April 20, 2011

Running the User Plan Status Legacy Report

Notes

Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

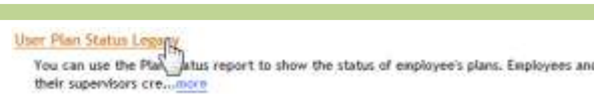
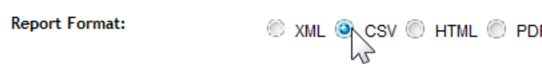
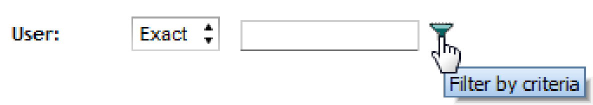
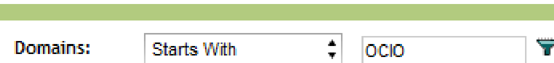
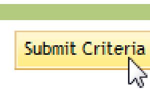
If your agency has a large population, you will probably find that the legacy report meets your needs better than the newer report. The **User Plan Status Legacy Report** shows the status of each employee's IDP plan. Because this report is usually run for an entire agency, it is important to know how to set the report parameters so that the report does not strain system resources and does not "time-out" trying to select each agency employee record. This job aid shows you how to define the plans you wish to see for the most current time period. You will see plans that are in Submit Pending Status, Active Approved Status, No Plan, and Draft/Rejected or Expired status.

Since this report is often run on a weekly basis to keep track of agency progress, the job aid walks you through the steps of creating a recurring report that will be emailed to yourself each week. The job aid also illustrates how to select a CSV format, compatible with Excel.

Depending on the size of your agency, you may be able to run the legacy report during business hours. However, if the report fails to complete and "times out" on your initial attempt, schedule the report to run overnight. **Do not repeatedly try to run the report during business hours if your first attempt fails.**

The CSV report format creates an Excel compatible output to download onto your PC. Data in this format can be manipulated and sorted in Excel.

It is critical to follow these steps to select your users. Do **not** try to select all of your users by name, as this will certainly "time out" your process and disable your ability to run the report.

Step	Activity	View
1.	From the AgLearn Admin Home Page, select **Reports**.	
2.	In the Search box, enter **User Plan**; then select only the **Performance** category.	
3.	Click **Submit**.	
4.	Select the **User Plan Status Legacy** report.	
5.	Select the **Local File** option.	
6.	Select the **CSV** option.	
7.	Click the User **Filter by criteria** icon.	
8.	Enter your Agency acronym.	
9.	Click **Submit Criteria**.	

Notes

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10. Note that the User field indicates criteria have been specified.

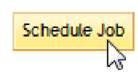
11. Select the statuses you wish to see in the report.

12. In the **Expiration Date From** box, enter a current expiration date.

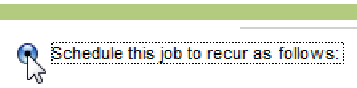
Note: In this example, the report will return all plans with an expiration date after September 25th of 2011.

Notes: Entering a date of 9/25/YYYY will return plans whose expiration date is after September 25th of the current cycle. This includes both Fiscal and Calendar Year plans.

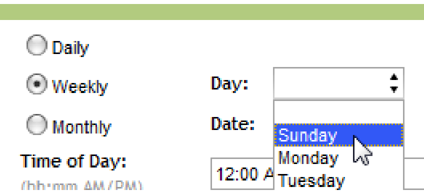
13. Click **Schedule Job**.



14. Click the **Schedule this job to recur as follows** option button.

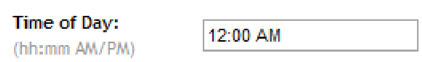


15. Select the Weekly option; then select the day you wish to run the report.



16. Enter the time that you wish to run the report.

Notes: You must select a time between 12:00 AM and 5:00 AM.



17. Enter a **Job Description**.

Notes: Descriptions help to identify the report after it's created.

18. Check the **Notify via email upon completion** and the **Email the Report** checkbox. Be sure your correct email address is identified.

19. Click **Finish**.

20. Observe the message; then click the **Finished** button to complete the scheduling process.

Notes: You will receive a weekly email from AgLearn.System@ocio.usda.gov with the CSV report attached.

Note: The CSV file produced by the Legacy report will summarize your data for you in the first four lines of the report. See "**Analyzing User Plan Status Reports CSV files**" to learn more.