

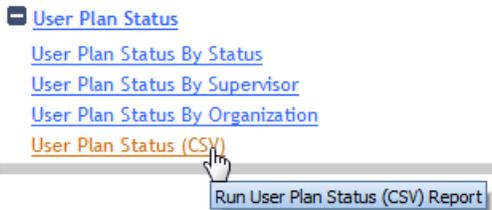
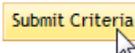
Notes

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.

Running the User Plan Status Report

The **User Plan Status 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, so that you can sort the data by any of the fields provided.

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.	Click the + to expand the .	
5.	Select the User Plan Status (CSV) report.	
6.	Click the User Filter by criteria icon.	
7.	Enter your Agency acronym.	
8.	Click Submit Criteria .	

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.

Notes

Running the User Plan Status Report

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.

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

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

You will receive a weekly email from AgLearn.System@ocio.usda.gov. Attached to the email will be the CSV report with the most recent data.

9. Observe that the User field now indicates criteria have been specified.

Mask User IDs

User: [Criteria Specified] ▼ ▼

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

Expiration Date From:

(MM/DD/YYYY)

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

11. Click **Schedule Job**.

Note: Do *not* click Run Report. Your report will strain system resources. A report capturing all agency data is too large to run during normal operating hours.

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

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

Daily
 Weekly
 Monthly

Day:

Date:

Time of Day:

(hh:mm AM/PM)

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

Time of Day:

(hh:mm AM/PM)

15. Enter a **Job Description**.

Job Description:

16. Check the **Notify via email upon completion** as well as the **Email the Report** checkbox. Be sure your correct email address is identified.

Notify via email upon completion

Email:

Email the Report

17. Click **Finish**.

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

Recurring Report Job Scheduled

Status: