

How to Run a Learning Plan Report

The purpose of this 'How To' is to walk you through the creation and running of a **Learning Plan** report.

- You would choose this report to check currently assigned, incomplete training as well as completed training that has periodicity or retraining requirements.
- The report includes the following data:
 - User name,
 - Penn ID,
 - Item,
 - Item Title,
 - Required Date,
 - Remaining Days,
 - Assignment Type,
 - Curriculum ID (if applicable),
 - Complete Date (if completed with retraining need or periodicity)
 -
- A CSV option is available so data can be downloaded in order to be manipulated or shared.

This report takes the place of the following BEN reports: Current Status of Required and Optional Courses, for the Org./Business Unit; Current Course by Trainee; and Current Required Course Status, by Course.



Generally speaking you will follow these steps when running a report:

1. Select the **Admin** tab
2. Click the **Reports** button
3. Choose the category and report type
4. Choose the search criteria and elements to filter (items, or users, organizations, etc.)
5. Set up your filters making sure that you submit each one of them (*There can be filters within filters so you have to be careful with these.*)
6. Review the criteria for your report
7. Run the report (or decide to schedule it later if it involves a heavy amount of data)
8. Save the report criteria and filters so you don't have to rebuild it again
9. Set up a regular schedule to automatically run the report and email the results to you

How to Run a Learning Plan Report

User Learning Plan

PENN EXAMPLE: You need to select all temporary employees in ULAR to monitor their current training.

The upper half of the **Run Report** screen allows you to customize the formatting of the report's title, header, footer, destination and overall format (html or pdf).

This report can be used for individuals as well as groups that you define through filters. These filters are the same type that you used to find users to assign items and curricula.

Click the **User filter**

TIP: Best practice would be to always click on the blue filter which offers you the widest variety of criteria for your report.

Learning Plan | Browse | Help

> Run Report

Run Learning Plan

Report Title:

Report Header:


Report Footer:

Report Destination:

Report Format:

Page Break Between Records

Case sensitive search: Yes No

User: 

User Status: Active Not Active Both

Sort By: Item Required Date Assignment Type Curriculum

List By: All Needs Requirements

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The **Users Filter for Learning Plan, Search Users** screen is displayed.

Enter **“8306”** for the **Organizations** and **“temporary”** for the **Employee Statuses**. This will select all employees in ULAR who are temporary.

Notice that there are additional filter options for Organizations and Employee Statuses if your needs are more complicated than simply ULAR temps.

Click **Search**.

Users Filter For Learning Plan

Create the filter using the search below. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Be aware of case insensitive search could take long time.

Search Users

Search Submit Criteria Reset

Case sensitive search: Yes No

User ID: Starts With []

Last Name: Starts With []

First Name: Starts With []

Middle Initial: Starts With []

Role ID: Starts With []

User Status: Active Not Active Both

Profile Status: Active Expired Both

Organizations: Contains [8306]

Employee Statuses: Contains [temporary]

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The **Users Filter for Learning Plan, Select Users from List** screen is displayed.

1. Click **Select All** to select all of the users that you just filtered for, **ORG 8306 temporary employees**. (You can tweak this selection by unchecking boxes if you need to.)

NOTE that the **Records per Page** setting should be higher than the number of total records so that when you click **Select All**, you catch everyone.

2. Click **Add to Filter**
3. Notice that the filter box at the top of the screen shows that 37 users are in the filter. **YOU MUST CLICK THE SUBMIT FILTER BUTTON TO ACTUALLY CREATE THE FILTER!!**

Users Filter For Learning Plan

Learning Plan

Filter: 37 Users **Submit Filter**

Select Users from list

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

Records per Page 50 Page: 1 2 3 4 «Previous Next» (37 total records) Page 1 of 4. Go

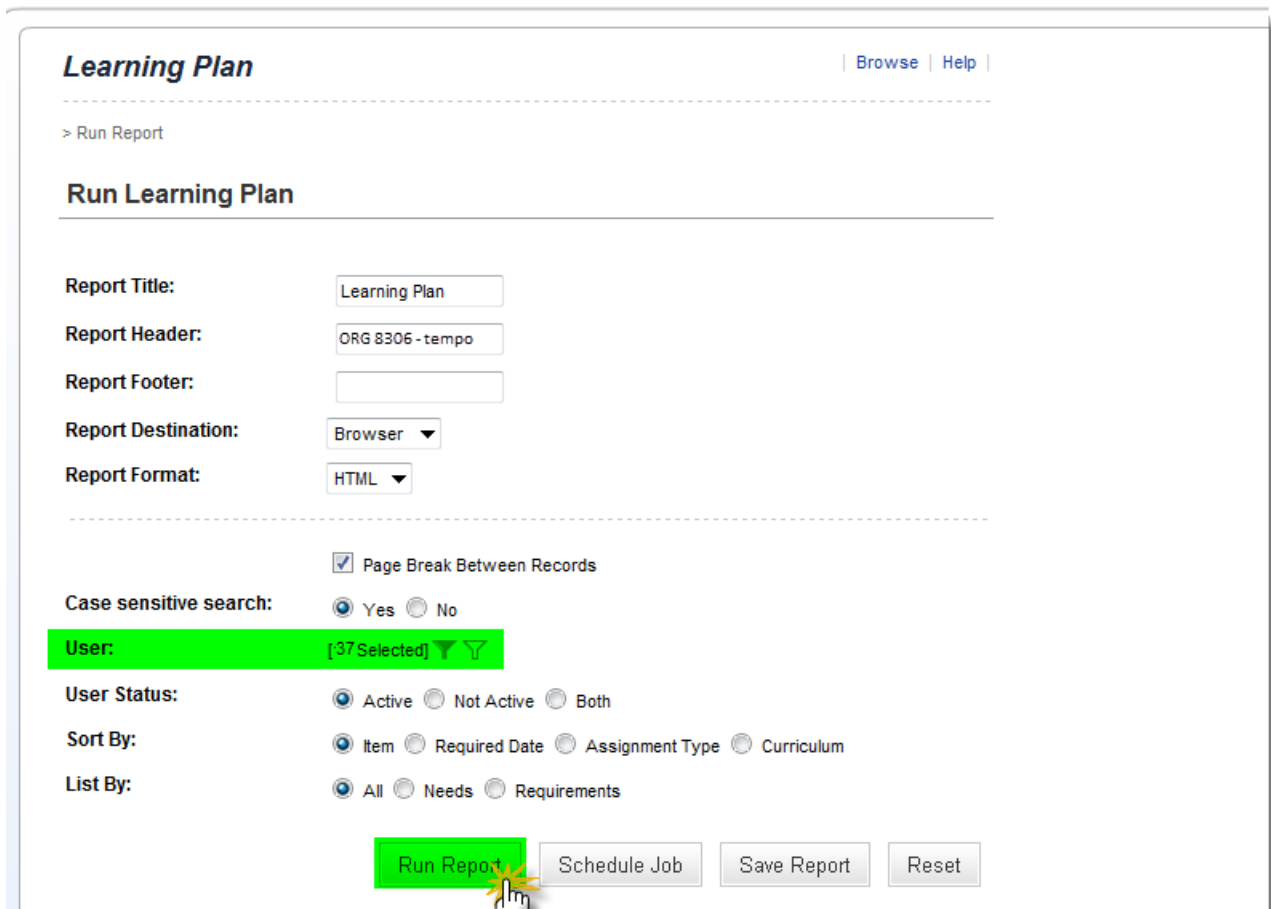
User ID	User Name	Job Location	Organization ID	Select
		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>

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After clicking the **Submit Filter** button, you return to the main screen for the **Learning Plan** report. Note that the filters have been “activated”. 37 users have been selected. (To clear the filter, click on the outlined funnel and to revise the filter, click on the solid funnel.)

Click the **Run Report** button to get your results.

You also have the options of **Schedule Job**, **Save Report** and **Reset** buttons. *We will discuss scheduling and saving in another guide.*



The screenshot shows the 'Learning Plan' report configuration interface. At the top right, there are links for 'Browse' and 'Help'. Below the title, there is a breadcrumb '> Run Report'. The main heading is 'Run Learning Plan'. The form contains several fields: 'Report Title' (Learning Plan), 'Report Header' (ORG 8306 - tempo), 'Report Footer' (empty), 'Report Destination' (Browser), and 'Report Format' (HTML). A checkbox for 'Page Break Between Records' is checked. The 'Case sensitive search' section has 'Yes' selected. The 'User' field is highlighted in green and shows '[37 Selected]' with two funnel icons. The 'User Status' section has 'Active' selected. The 'Sort By' section has 'Item' selected. The 'List By' section has 'All' selected. At the bottom, there are four buttons: 'Run Report' (highlighted in green with a mouse cursor), 'Schedule Job', 'Save Report', and 'Reset'.

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The results include the **User ID** (Penn ID) and **User Name** as well as

- **Item ID**
- **Item Title**
- **Required Date** (if applicable)
- **Days remaining until due** (If there are negative **Days Remaining**, it's overdue!)
- **Assignment Type**
- **Curriculum ID** (if the item is part of a curriculum)
- **Complete Date** (if it has been completed and has a retraining requirement, like annually, it will remain in the **Learning Plan**)

The report displays in a new window of your browser because we chose HTML.

The CSV version of this report contains several additional little-used fields. You might want to check and see if they are useful to you. Depending on the security settings of your computer, you might have to click several times to download and save the data to an Excel spreadsheet on your computer.

User

User ID : 12345678 User Name : Ross, Betsy

Learning Plan

Item	Item Title	Required Date	Days Rem	Assignment Type	Curriculum ID	Complete Date
COURSE UP.83019.ITEM.INTROM (Rev '1' - 8/7/2012 12:00 AM America/New York)	Introduction to Mouse Handling - IACUC-ULAR	10/5/2012 America/New York	25	REQ		
COURSE UP.83019.ITEM.SSHOTM (Rev '1' - 8/7/2012 12:00 AM America/New York)	Species-Specific Hands-on Training -- Mouse - ULAR	10/5/2012 America/New York	25	REQ	UP.83019.CURR.CURRMOUSE	
COURSE UP.83019.ITEM.SSTPM (Rev '1' - 8/7/2012 12:00 AM America/New York)	Mouse Training Pre-requisite - ULAR	10/5/2012 America/New York	25	REQ	UP.83019.CURR.CURRMOUSE	
COURSE UP.91028.ITEM.PROFILER (Rev '1' - 8/7/2012 12:00 AM America/New York)	PennProfiler- Required Training Assessment-VPR	9/30/2012 America/New York	20	REQ	UP.91028.CURR.PROFILER	

User

User ID : 12398765 User Name : Franklin, Ben

Learning Plan

Item	Item Title	Required Date	Days Rem	Assignment Type	Curriculum ID	Complete Date
COURSE UP.83019.ITEM.INTROM (Rev '1' - 8/7/2012 12:00 AM America/New York)	Introduction to Mouse Handling - IACUC-ULAR	10/5/2012 America/New York	25	REQ		
COURSE UP.83019.ITEM.SSHOTM (Rev '1' - 8/7/2012 12:00 AM America/New York)	Species-Specific Hands-on Training -- Mouse - ULAR	10/5/2012 America/New York	25	REQ	UP.83019.CURR.CURRMOUSE	
COURSE UP.83019.ITEM.SSTPM (Rev '1' - 8/7/2012 12:00 AM America/New York)	Mouse Training Pre-requisite - ULAR	10/5/2012 America/New York	25	REQ	UP.83019.CURR.CURRMOUSE	