

iLearn

PDP reporting

PDP reporting

This guide provides a general overview on how to run PDP reports.

For	PDP Supervisor – PDP Reporting Administrator
Last Updated	March 2016 (Version 1.1)
Menu	My PDP– run a report
Department	NPSR, EHP

In this guide:

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- ‘Stages of P&DP’ report **Pages 4, 5, 6, 7, 8**
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- Exporting the PDP report to Excel **Page 13 & 14**

Available reports

As a supervisor you have access to a variety of reports that can assist you in managing the PDP process for your team. There are five different reports to choose from and the report you select depend on the information you require. Below is a description on each of the available reports.

[← Back to Dashboard](#)

Reports

Stages of P&DP

This report extracts the **details for all PDPs** in a work unit, for plans started during the selected date span.

To run this report go to page 4.

P&DP Reporting Structure

This report displays the **supervisors** and the **names** of their **current team members** within a work unit.

To run this report go to page 9.

Overdue Plans

This report displays any plans in a work unit where the **closing review conversation is overdue**.

To run this report go to page 9.

Team Members with No Supervisor

This report displays any team members who **do not have a PDP supervisor** set up in PDP online.

To run this report go to page 9.

Team Members with No P&DP

This report displays any team members who **do not have a PDP recorded**.

To run this report go to page 9.

'Stages of PDP' report

The screenshot shows the iLearn home page. At the top, there is a search bar and a user profile for 'iLearn *Training51' with a notification badge for '12'. Below this is a navigation menu with the following items: Home, My Learning, My Learning Transcript, Browse Learning, My PDP (highlighted with a red box and a '1' above it), Discussion Forums, and Training Calendar. The main content area features a 'Welcome to iLearn!' section with a list of capabilities: complete interactive online training programs, track your own training and development, and record the dates of your Performance and Development Planning cycle. There is also a 'Community Recovery' section with a link to 'View more details here'. At the bottom, there is a 'Training Calendar' section with a map of Queensland divided into regions: Far North Queensland, North Coast, Brisbane CBD, Brisbane, South East, North Queensland, Central Queensland, and South West. A list of regions is provided: All Regions, Brisbane Region excl CBD, Brisbane CBD, Central QLD, Far North QLD, North Coast, North QLD, South East, South West, and Webinar/Online Event.

1
To 'run a report' click 'My PDP' from the iLearn home page.

Search

12 iLearn *Training51

Home My Learning My Learning Transcript Browse Learning **My PDP** Discussion Forums Training Calendar

Performance and Development Planning

Welcome to P&DP Online. P&DP Online is a tool to record Performance and Development conversations.

What do I do? If this is your first time in setting up an Performance and Development Plan (P&DP) for yourself or your team, it is recommended you view the P&DP resources located at the bottom of the screen.

My P&DP

My Plan

My Past Plans

My Team

My Teams Plans

My Teams Past Plans

Run a Report **2**

Useful links & tools

Resources

* Please note this link should not be opened in a new window

2

Under the 'My Team' section, click 'Run a Report'.

TIPS

If you are unable to see the 'My Team' section contact the iLearn support team to set-up your access.

From the header, hover the mouse over the '≡' icon and select 'iLearn Support' from the menu. You can submit the request using the 'Submit Support Ticket' link located on the left hand side of the screen.

Search [magnifying glass icon]

iLearn *Training51 [12 notifications]

Home My Learning My Learning Transcript Browse Learning **My PDP** Discussion Forums Training Calendar

← Back to Dashboard

Reports

3 Stages of P&DP

P&DP Reporting Structure

Overdue Plans

Team Members with No Supervisor

Team Members with No P&DP

3 Click 'Stages of P&DP' to access the P&DP report.

4

Select the required **'Work unit'** from the dropdown.

5

Select :

'Yes' to retrieve all **open plans** (i.e. 'In Progress', 'Review Due', 'Review Overdue' excluding 'Plan Complete'; and

'No' to retrieve **all plans** started during the period (i.e. 'In Progress', 'Review Due', 'Review Overdue', including 'Plan Complete')

TIPS

It is recommended you leave the default option as **'Exclude completed plans - Yes'**. This will remove all plans that have been closed from the report.

6

Select the date span from the calendar pop-up by clicking in the date boxes.

TIPS

Date Span: Leave the **'Plan started after'** date **blank** to retrieve all plans that are **'In Progress'**.

7

Click **'Run Report'**.

8

Indicates that your report is running.

[← Back to Reports](#)

Stages of P&DP

Work Unit:

Exclude completed plans:

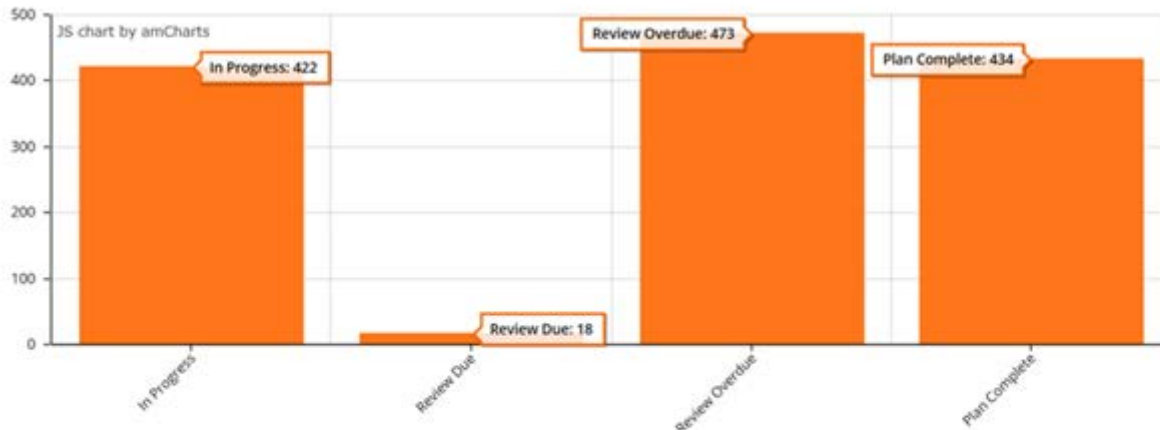
Plan started after:

Plan started before:

Human Resources Work Unit

- 11/12/2015 date range

913 users found



Team Member	Email	Work Unit	Supervisor	Stage	Duration	Start Date	Mid Point Date	Close Date	Completed Date
ACP, Learner	acp.learner@qld.gov.au	Human Resources	ACP Supervisor	Plan Complete	3 months	24/03/2015	1/02/2015	30/06/2015	29/09/2015
Basic, User	basic, user@qld.gov.au	Human Resources	Mary Supervisor	In Progress	12 months	29/09/2015	29/03/2016	28/09/2016	
Jo, Soap	jo.soap@qld.gov.au	Human Resources	Basic Supervisor	Closing Review Overdue	3 months	30/03/2015	1/02/2015	30/06/2015	

9

The report results display on screen.

TIPS

Interpreting the Stages:

In Progress – refers to all plans that are in progress within your specified date span.

Mid Point Review Due / Closing Review Due – refers to all plans that have a midpoint or closing review coming up within the next two weeks from the date the report is generated.

Mid Point Review Overdue – all plans with midpoint reviews outstanding.

Closing Review Overdue – all plans with closing reviews outstanding.

Note: If both the Midpoint Review and the Closing Review is outstanding, the report will return that a Mid Point Review is overdue (this should be the earlier of the two dates).

Plan Complete – all plans with Mid Point and Closing Reviews signed off.

TIPS

To export the report to **Microsoft Excel**, follow steps 1 to 7 on page 13-14.

All other reports

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Search

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[← Back to Dashboard](#)

Reports

Stages of P&DP

Overdue Plans

Team Members with No P&DP

P&DP Reporting Structure

Team Members with No Supervisor

3

3

Click on the report of your choice to access the P&PD report.

Search

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Home My Learning My Learning Transcript Browse Learning **My PDP** Discussion Forums Training Calendar

[← Back to Reports](#)

P&DP Reporting Structure

Work Unit:

Run Report

Report Running

4

5

6

4



Select the required 'Work unit' from the dropdown.

5

Click 'Run Report'.

6

Indicates that your report is running.

Search  iLearn *Training51 

Home My Learning My Learning Transcript Browse Learning **My PDP** Discussion Forums Training Calendar

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P&DP Reporting Structure

Work Unit:

[Run Report](#)

[Microsoft Excel Version](#)

Human Resources Work Unit 7

36 users found

Team Member	Email	Supervisor	Organisation	Org Unit	Work Unit - Level 2
ACP, Learner	acp.learner@qld.gov.au	ACP Supervisor	Environment and Heritage Protection	4102 Corporate Services	10204 Human Resources
Basic, User	basic.user@qld.gov.au	Mary Supervisor	Environment and Heritage Protection	4102 Corporate Services	10204 Human Resources
Jo, Soap	jo.soap@qld.gov.au	Basic Supervisor	Environment and Heritage Protection	4102 Corporate Services	10204 Human Resources

7 The report results display on screen.

TIPS
To export the report to **Microsoft Excel**, follow steps 1 to 7 on page 13-14.

Exporting the P&DP report to Excel

Search 12 iLearn *Training51

Home My Learning My Learning Transcript Browse Learning **My PDP** Discussion Forums Training Calendar

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P&DP Reporting Structure

Work Unit:

1

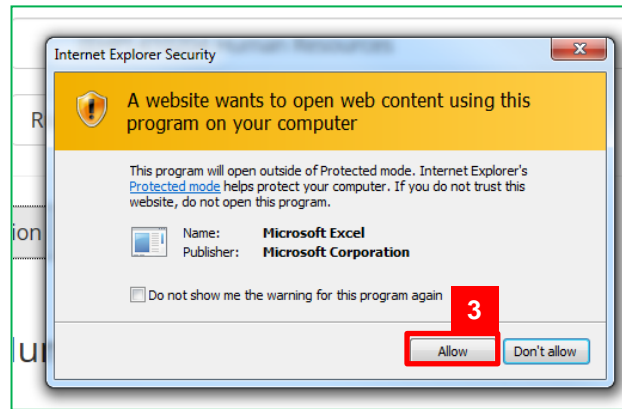
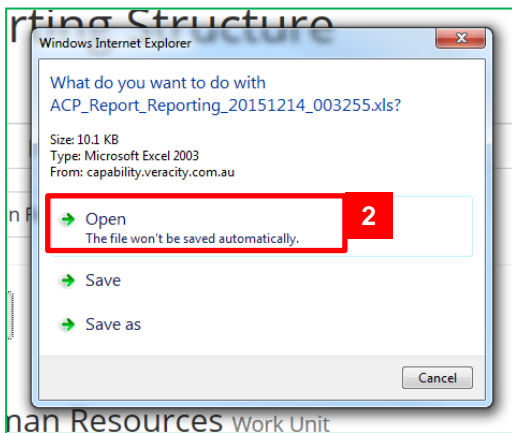
Human Resources Work Unit

36 users found

Team Member	Email	Supervisor	Organisation	Org Unit	Work Unit - Level 2
ACP, Learner	acp.learner@qld.gov.au	ACP Supervisor	Environment and Heritage Protection	4102 Corporate Services	10204 Human Resources
Basic, User	basic.user@qld.gov.au	Mary Supervisor	Environment and Heritage Protection	4102 Corporate Services	10204 Human Resources
Jo, Soap	jo.soap@qld.gov.au	Basic Supervisor	Environment and Heritage Protection	4102 Corporate Services	10204 Human Resources

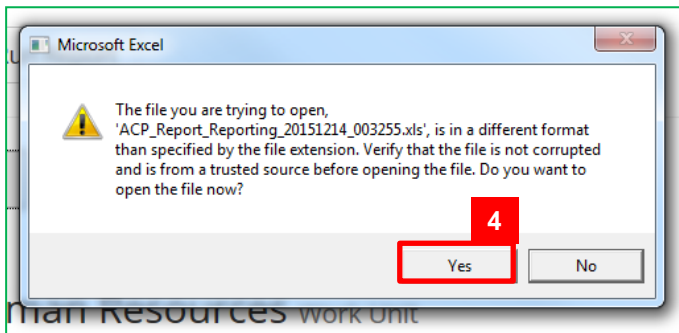
1

Click 'Microsoft Excel Version' to export the report to Microsoft Excel.

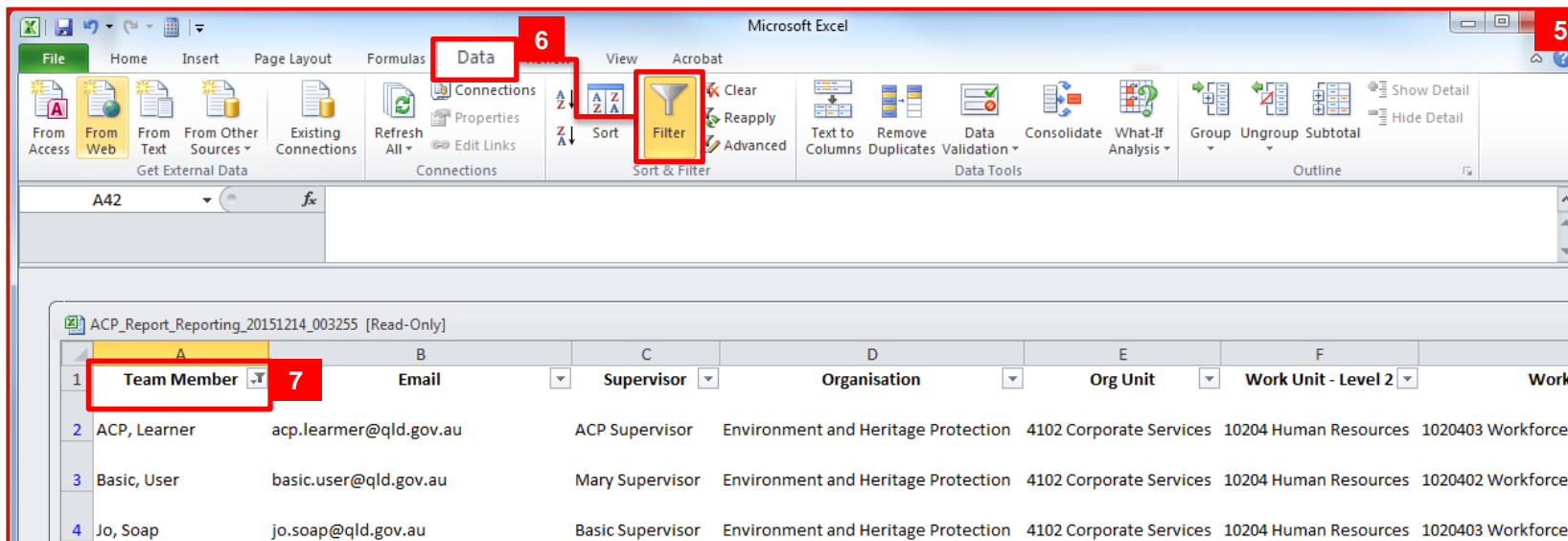


2
Click 'Open' to open the file.

3
If you get a warning screen advising that a website wants to open web content using this program on your computer, just click 'Allow' to continue and open the file.



4
If you get a warning screen advising that the file is in a different format, just click 'Yes' to continue and open the file.



5
The Report should now appear in Microsoft Excel.

6
You can apply a simple Auto filter to the header row by selecting Row 1 and clicking 'Data' and then 'Filter'.

7
Then you can filter by 'Team Member', or any other row header as required.

Save the Excel file in your directory as required.