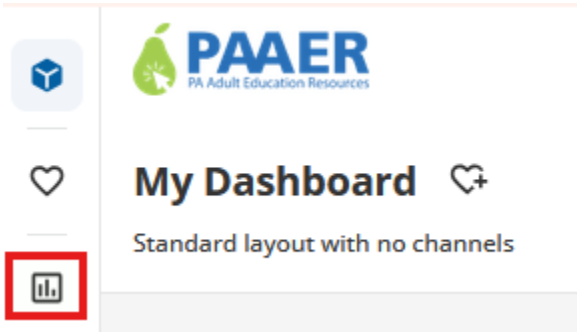
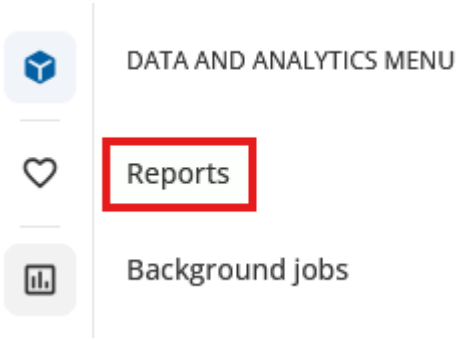
PD Portal Agency Reports Guide

How to Run Your Agency Report in the PD Portal

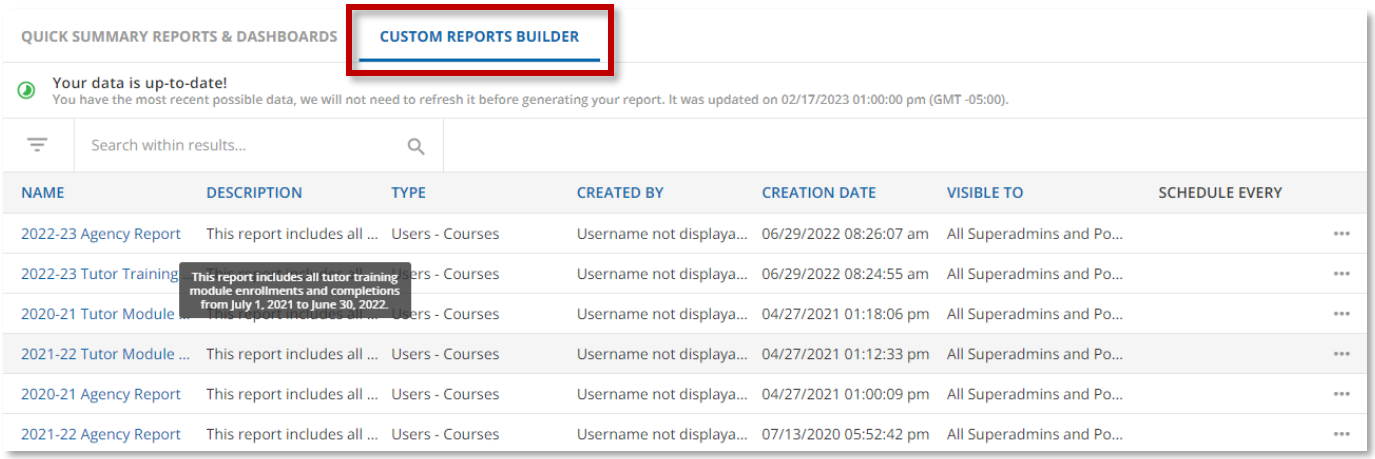
1. Log into the PD Portal at https://pdportal.paadultedresources.org.
2. Click the chart icon located on the left side of the page to open the **Data and Analytics** menu.



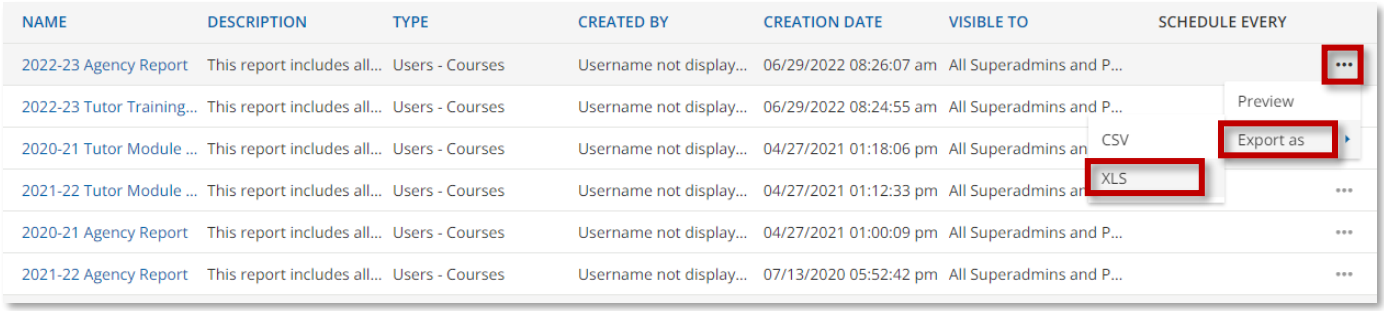
From the Data and Analytics menu, click the **Reports** option to access the Reports page.



3. Click on the **Custom Reports Builder** tab. The reports available to you will be listed. Hover over the **Description** column to read a description of each report. Take note of the program year of the report you want to run.



4. Click the ellipsis menu at the end of the row for the report. To generate an Excel spreadsheet of your report, select **Export as**, and click **XLS**. (If you choose to **Preview** your report instead, the first 100 rows of your report will display on your screen.)



5. A dialog box will appear. Click **Export.**

6. A link to the report will be sent to your email address. Click the link in your email to download the report. You will be prompted to sign into the PD Portal if you are not already signed in. Save the report to your computer.

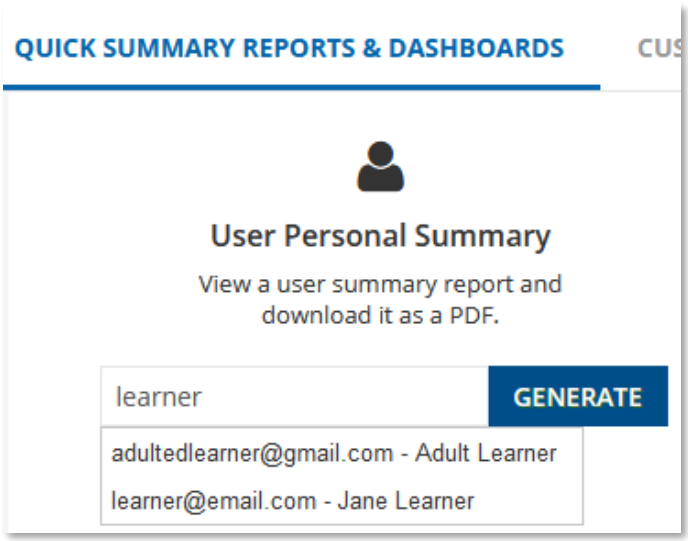
How to Run a Report on a Staff Member in the PD Portal

1. Follow steps #1-3 on page 1 to access the **Reports** page.

2. Under the **Quick Summary Reports & Dashboards** tab, in the **User Personal Summary** field, type the staff person's first name, last name, or email address.
   Do not include any spaces in your search or attempt to type both first and last names.

3. As you type, the staff person's email address and name will appear below the search field. Select and click on the correct name.

4. Click **Generate**. You can print or download the complete user profile and course enrollment history of the staff person.



How to Read Your Agency Report

Term	Description
Username	All users are assigned a username, which is their email address.
Course Code	All courses are assigned a code based on the current program year, which helps clarify whether or not the course offers Act 48 credit. For example: • "2022-23" indicates a course that is offered within the 2022-23 program year and is not eligible for Act 48 credit hours. • "2022-23 ACT 48" indicates a course that is offered within the 2022-23 program year and is eligible for Act 48 credit hours.
Enrollment Date	This field indicates the date when a user enrolled in a course, not the date when the course began or will begin.
Completion Date	This field indicates when the user completed the course, not when the course itself was closed.
Course Enrollment Status	This field indicates a user's status within individual courses. • "Completed" indicates the user has completed all assignments for the course and has been given credit for completing the course. • "In Progress" indicates that the user has begun work in the course, but has not yet finished the course. If a user starts a course and does not complete it before the course's end date, the user will be marked as "In Progress" for the rest of the year. Check with your staff members if you have questions about their progress in a course. • "Subscribed" indicates a user has been enrolled in a course, but has not yet accessed it. • "Waiting Users" indicates a user has been placed on a waiting list for a course that has reached maximum enrollment. The user will be added to the course if a spot becomes available. • "Suspended" indicates that the user has been suspended from the course.
PPID#	If a user has a PPID number entered into their PD Portal account, it will appear on the report. This field will remain empty if the user does not have a PPID. (**Note:** Because Tutor Training modules are not eligible for Act 48 credit, PPID numbers are not included on Tutor Module Reports.)

Please Note:

- All courses available during the program year are included on the Agency Report. Only Tutor Training Module courses are included on the Tutor Module Report.
- Report data may not be real-time. Report data is updated when you run your report only if it has not been updated in the last four hours.
- If there is no data in your report, it means that no users at your agency were enrolled in the courses included on your report at the time the data was last updated in the system.
- Agencies with subcontractors will see their subcontractors' enrollments on their report. You may want to sort your report by agency after downloading it.

Contact pdportal@tiu11.org for questions about your agency report or the PD Portal.