Managing Learning Plans

Skip to end of metadata
Go to start of metadata

The *My Learning* tab contains a link to the *Learning Plans* page. The page contains a list of your learning plans. A summary of the learning plan including the due date and progress status is displayed. Learning plans are grouped into *Active*, *Unapproved,* and *Completed,* and they are displayed chronologically.

The way learning plans work in your organisation is determined by the learning plan template set by the site administrator. See 'Templates' to learn more.

Create a learning plan

1. Click *My Learning > Learning Plans* and click **Create new learning plan**.
2. Select a **Plan template**.
3. Enter the **Plan name**, **Plan description**, **Date started** and **Completion date**.
4. Click **Create plan**.

Courses

1. Click the *Courses* tab to view the course options for your learning plan.
2. Click **Add courses** to add a course to your learning plan.
3. Select the course(s).
4. The selected courses appear in the right hand column. Click the delete icon to remove the course.
5. Click **Save** to add the course(s) to your learning plan.

   When there are more than 100 courses in the category, you can only use the search function to select courses.

6. Once a course has been added you are able to set the **Priority** and **Due date** (depending on the template settings).
7. Click the delete icon to remove a course from your learning plan.

Competencies

1. Click the *Competencies* tab to view the competencies options for your learning plan.

   Your site administrator can set up your learning plan to work in a specific way, so for example they can select for competencies assigned to your position and/or organisation to automatically appear in your learning plan when created.

2. Click **Add competencies** to add a competency to your learning plan.
3. Select the competency framework you wish to add competencies from.
4. Select the competencies you wish to add.
5. The selected competencies appear in the right hand column. Click the delete icon to remove a competency.
6. Click **Continue**.
7. When you select a competency with a course assigned as an evidence item, the course(s) are displayed and selected by default. Uncheck the checkbox to prevent the course(s) being added to your learning plan.
8. Click **Save** to add the competencies and course(s) to your learning plan.

   When there are more than 100 competencies in the framework, you can only use the search function to select competencies.

9. Once a competency has been added, you are able to set the **Priority** and **Due date** (depending on the template settings).
10. Click the delete icon to remove a competency from your learning plan.

Objectives

1. Click the *Objectives* tab to view the objective options for your learning plan.
2. Click **Add new objective** to add an objective to your learning plan.
3. Enter an **Objective Title** and **Objective description**.
4. Set a **Priority**, if available.
5. Set a **Status** if available.
6. Click **Add objective**.
7. Once an objective has been added you are able to set the **Priority**, **Status**, and **Due date** (depending on the template settings).
8. Click the delete icon to remove an objective from your learning plan.

Submitting a learning plan for approval

Once you have completed the plan click **Send approval request** to submit your plan for approval. A notification is sent to your manager and a new task appears on your manager's **My Learning** dashboard.

When your manager approves or declines your plan a notification is sent to you.

Auto-create learning plans

1. As admin, go to *Site Admin > Users > Accounts > Audiences* and create a dynamic audience.
2. Add a rule to select some users.
3. Go to the **Learning plan** tab to create new learning plans for all members in the audience.
4. **Plan template** should let you pick from the visible plan templates which template you want the user's plans to be based on.
5. **Exclude users who** lets you define audience members who shouldn't get a new plan created. If the user meets any of the checked criteria, a plan won't be created for them.
6. **Manually created** means the user created a plan by pressing 'Create new plan'.
7. **Automatically created** means it was created via this process.
8. **Create new plans as** should let you define the status of the newly created plans (Draft or active).
9. Select **Create plans**.

When you select **Create plans** you should see a confirmation dialog, explaining how many users will be affected and giving you the chance to confirm.

If you continue the plans should be created, you should get a confirmation message and the history table will populate showing what was done.

If no users meet the plan creation criteria (no one in the audience, or all users meet the 'exclude users who' criteria) then the dialog should tell you 'This action will not affect any users' and prevent any further action.

Editing a learning plan

Before a plan is submitted for approval you can go in and add/remove courses, competencies, and objectives.

Once you have submitted your learning plan for approval what you can edit depends on how your Totara site administrator has set up the workflow for the learning plan template being used.

Click **Add courses**, **Add competencies**, and **Add new objective** to add an item to the learning plan. When an item is added to an approved plan a notice of draft item appears, click **Send approval request** to request approval of the added item.

Learning plan comments

Learning plans have a comments section, which allows a dialogue between the learner and their manager. Comments can be added to the plan as a whole and to each individual item (course, competency, etc.) in the plan. Comments appear in a linear list and comment notifications are emailed to the users involved in the conversation. This would typically be the learner and the manager, although comment notifications will also be sent to other users who have participated in a conversation e.g. a previous manager.

To add a comment on a team members learning plan:

1. Select *My Learning* > *Learning Plans*.
2. Select the plan you want to comment on.
3. Type in the comment.
4. Click **Save comment**.
5. A history of the saved comments will be kept on the learning plan.

Viewing learning plans

Learning plans are viewable by the learner's manager and site administrators.

Viewing learning plans as a manager

As a manager you are able to view the learning plans for all your direct reports. The permissions you have when viewing your staff's learning plans are defined in the learning plan template set by the administrator.

View learning plans

1. Click **My Team** on the navigation bar.
2. Click **Plans** under each staff member to view all their learning plans. You are able to see all completed and active learning plans for each staff member.
3. Click the name of the plan to view the details of the plan.

Approving a plan

You are notified when a learner submits a plan for approval. When viewing a plan which requires an approval, the approval and decline buttons appear on the learning plan overview page and in a box above the plan when viewing the plan details.

Learning plan comments

To add a comment on a team member's learning plan:

1. Click **My Team** on the navigation bar.
2. Click **Plans** under the staff member.
3. Select the plan you want to comment on.
4. Type in the comment.
5. Click **Save comment**.
6. A history of the saved comments will be kept on the learning plan

Viewing Learning Plans as an Administrator

As an administrator you have the ability to view and edit all users learning plans.

To view a users learning plan:

1. Click *Users > Accounts > Browse list of users.*
2. Search for the user you want.
3. Click the name of the user to view their user profile.
4. Click **Learning Plans** to view the users learning plans.

As an administrator you have the ability to edit plans, delete plans, create a new plan, reactivate a completed plan, and approve plans.