

Adding Goals from Expired Plans to Your IDP

Moving uncompleted goals from your old IDP to your new plan can happen in two ways. If your old fiscal year plan is in an Approved status and the current date is prior to the plan's expiration date, simply create your new plan before the old plan's expiration date and all uncompleted goals will automatically appear in your new plan.

Many people, however, do not think about creating a new plan until after their old plan has expired. The following procedure will show you how to add a goal to your new plan that you did not have an opportunity to complete during a previous plan.

Step	Activity	View																		
1.	From the My Goals Workspace, select your newly created IDP. Note: Reach the My Goals Workspace by selecting the IDP Goals status pod on the AgLearn Home Page.																			
2.	Select Add Goal .																			
3.	From the Add Goal window, select Goal Wizard .																			
4.	From the Goal Wizard window, select the option to Add Goals from Other Plans .																			
5.	Select Next .																			
6.	From the list of plans displayed, select the plan that contains the goal you wish to copy.	<table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Plan Name</th> <th>Plan Period</th> <th>Plan Status</th> <th>Effective Date</th> <th>Expiration Date</th> <th>Select</th> </tr> </thead> <tbody> <tr style="background-color: #e0e0e0;"> <td>My 2012(Development)</td> <td>Fiscal Year 2012</td> <td>Expired</td> <td>10/1/2011 12:00 AM America/New York</td> <td>9/30/2012 12:00 AM America/New York</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>My FY11 Development Plan (Development)</td> <td></td> <td>Expired</td> <td>10/1/2010 12:00 AM America/New York</td> <td>9/30/2011 12:00 AM America/New York</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Plan Name	Plan Period	Plan Status	Effective Date	Expiration Date	Select	My 2012(Development)	Fiscal Year 2012	Expired	10/1/2011 12:00 AM America/New York	9/30/2012 12:00 AM America/New York	<input checked="" type="checkbox"/>	My FY11 Development Plan (Development)		Expired	10/1/2010 12:00 AM America/New York	9/30/2011 12:00 AM America/New York	<input type="checkbox"/>
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7.	Select Next .																			

Notes

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8. Select all of the goals you wish to copy to your new plan.



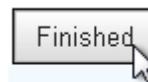
9. Select **Next**.



10. Enter a target date for this new goal. Select **Copy Activities** if you'd like to move the associated activities to the new plan as well.



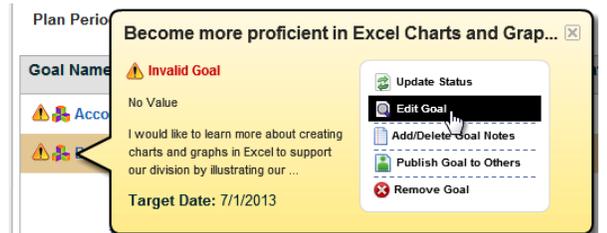
11. Select **Finished**.



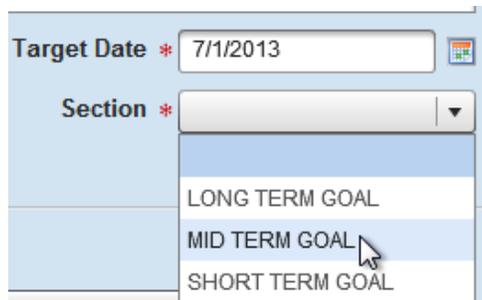
12. The goal now appears in your new plan. Note the **Invalid Goal** alert next to the goal. You'll need to edit this goal to make one final change.



13. Hover over the goal and select **Edit Goal**.



14. From the Section drop-down list, choose a goal type.



15. Click **Save and Close**.

