

**Notes**

Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

## Creating an IDP in AgLearn 6.4

This job aid will take you through the steps for creating a new IDP, adding a goal, adding an activity and submitting your plan for approval.

Step	Activity	View
1.	From your AgLearn Home Page, select the <b>IDP Goals</b> status pod. <b>Note:</b> The <b>My Goals Workspace</b> appears.	
2.	In the upper right corner of the My Goals Workspace, select <b>Create Plan</b> .	
3.	From the Plan Type drop-down list, select <b>Development</b> .	
4.	Enter a <b>Plan Name</b> for your IDP.	
5.	Select a plan period	
6.	Select <b>Save and Add Goal</b> .	
7.	Enter a Goal Name. <b>Note:</b> You may also wish to enter an optional goal description.	
8.	Select the calendar icon to enter a <b>Target Date</b> for your goal.	
9.	Select a <b>Category</b> for your goal.	

You can also enter a description for your plan, although this is not a required field.

At this point, your plan is in Draft status, meaning that it has not yet been submitted to your supervisor.

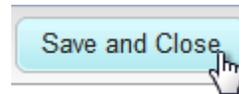
## Creating an IDP in AgLearn 6.4

10. Select a **Section** for your goal.



A screenshot of a web form element. It features a label 'Section \*' in red text to the left of a dropdown menu. The dropdown menu is open, showing three options: 'Long Term Goals', 'Mid Term Goals', and 'Short Term Goals'. The 'Mid Term Goals' option is highlighted in blue, and a mouse cursor is pointing at it.

11. Select **Save and Close** to save your goal and close your plan..



A screenshot of a button labeled 'Save and Close'. The button is light blue with rounded corners. A mouse cursor is pointing at the bottom right corner of the button.

Notes

## Adding a Goal Activity Using AgLearn Items

Activities can be attached to goals by you or your supervisor to identify what things you might do to help you reach your Goals. For example, if my goal is to become more proficient in Excel Charts, I might add an activity that would involve taking an AgLearn course (known as an AgLearn Item) that covers advanced topics like Excel Charts. The following task will show you how to create a goal activity by searching and using Items in AgLearn.

If you are continuing from the previous task, you can skip this step.

Step	Activity	View
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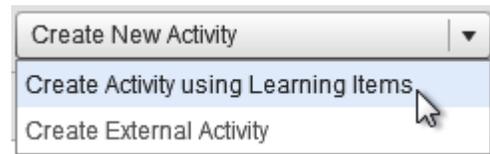
1. From the My Goals Workspace screen, hover over your goal name and select **Edit Goal**.



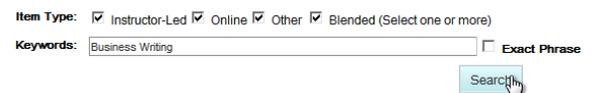
2. Scroll down to the Activities section of your goal.



3. From the Create New Activity drop down list, select **Create Activity using Learning Items**.



4. Enter a phrase to search for AgLearn courses related to your goal and click **Search**.



5. From the list of available courses, select one or more courses to add as goal activities.



6. Select **Add** to add the activities to your goal.

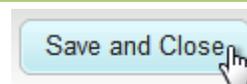


To edit or update your activity, hover over the activity title and select **Edit/Update**.

7. Review the Activities area to confirm your AgLearn courses are now listed as your goal activities.



8. Select **Save and Close**.



Notes

## Adding an External Goal Activity

Achieving your developmental goals may require activities that are not training related. Activities that don't involve AgLearn resources are called external activities.

Step	Activity	View
1.	From the My Goals Workspace screen, hover over your goal name and select <b>Edit Goal</b> .	
2.	Scroll down to the Activities section of your goal.	
3.	From the Create New Activity drop down list, select <b>Create External Activity</b> .	
4.	Enter a name for your activity.	
5.	Enter a target date for your activity's completion.	
6.	Select <b>Save</b> to save the external activity.	
7.	Select <b>Save and Close</b> to save and exit the goal.	

Be sure the target date for your activity is before the goal's target date.

**Tip:** Additional fields in the external activity form, such as Activity Priority and Target, Stretch and Actual fields are not required, but can be used to provide additional information. You may wish to identify your activity with a high, medium or low priority. Target and Stretch goals are associated with numeric goals, such as the example above to "submit at least 3 written reports for feedback". The Target activity in this case would be 3 (for 3 reports). A Stretch activity might be 4 (to submit 4 reports). The Actual field will be updated as the user makes progress on the activity. Target and Stretch fields are also used with assessed competencies, when added to your plan as goals because of identified competency gaps. The Target field will be populated with the required proficiency level for your job position. You can enter a level higher than the required level if you plan to increase your proficiency level beyond the required level.

Notes

## Submitting Your Plan For Approval

Once you have added at least one goal to your IDP, you will be able to submit your plan for approval by your supervisor. This will move your plan from Draft status to Pending Approval status. Once submitted, you'll be able to check on who's responsible for the next action by selecting **View Plan Approvals**.

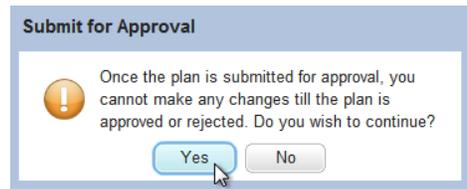
Step	Activity	View
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1. Click **Submit for Approval**.



There is an exception to this rule. See the task titled **Recalling an IDP Plan**.

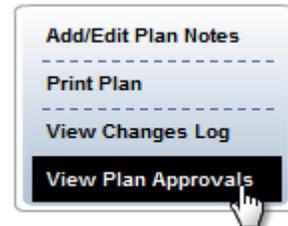
2. Select **Yes** to confirm your understanding that changes can no longer be made until the plan is approved or rejected.



3. Note that the current status of the plan is **Pending Approval**.



4. Select **View Plan Approvals** to view the name of the person who must take the next action.



There is no Action Date associated with the supervisor, indicating he is the person who must take the next action.

5. Note that your name is at the top of the list, along with the date on which you submitted your plan.

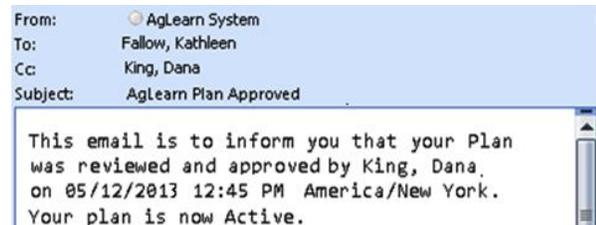
Approval Steps			
Step ...	Action	Name	Action Date
0	Submitted	Kathy Fallow	4/24/2012
1		Dana King	

6. Your supervisor will shortly receive an email from AgLearn System instructing him to log in to AgLearn and review and approve your plan.



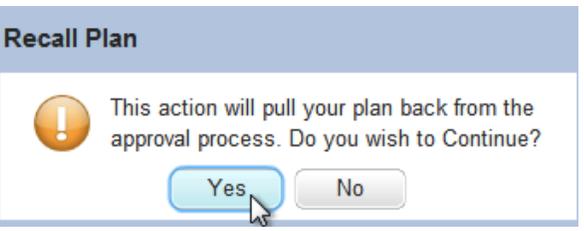
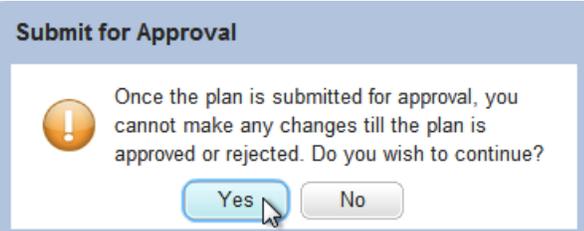
Keep in mind that significant changes requiring approval by the other party must be submitted for approval.

7. After your supervisor approves your plan, you will receive an email from AgLearn System. At this point you can continue to add goals and activities, or update the status of your goals as you make progress.



## Recalling a Plan

Normally, once a plan is submitted for approval, no additional changes should be made to the plan until it has been approved by your supervisor. If, however, you submit a plan for approval, and then realize you still have changes that you would like to make to the plan, you can select **Recall Plan** to return the plan to you before your supervisor approves it.

Step	Activity	View
1.	From the My Goals Workspace, select the plan you would like to recall. <b>Note:</b> Plans that appear with the phrase <b>(Pending Approval)</b> are eligible for recall.	 <p>My Goals Workspace</p> <p>Goal Status  <span style="color: green;">■</span> Complete (0.00%)  <span style="color: orange;">■</span> In Progress (0.00%)  <span style="color: red;">■</span> Behind (100.00%)</p> <p>View Plan: All Active Plans            Goal Name: All Active Plans            Kathy Fallow FY2012 IDP (Approved)            Kathy Fallow Fiscal Year 2013 IDP (Pending Approval)</p>
2.	Select <b>Recall Plan</b> .	 <p>View Plan: Kathy Fallow Fiscal Year 2013 IDP (Pending Approval)</p> <p>Recall Plan</p>
3.	Select Yes to confirm you understand and wish to continue the process.	 <p>Recall Plan</p> <p>This action will pull your plan back from the approval process. Do you wish to Continue?</p> <p>Yes No</p>
4.	Make any goal or activity changes you wish to make, and then select <b>Submit for Approval</b> .	 <p>View Plan: Kathy Fallow Fiscal Year 2013 IDP (Draft)</p> <p>Submit for Approval</p> <p>Changes to the Plan requires approval</p>
5.	Select <b>Yes</b> to confirm. At this point, make no additional changes until your supervisor approves or rejects your plan.	 <p>Submit for Approval</p> <p>Once the plan is submitted for approval, you cannot make any changes till the plan is approved or rejected. Do you wish to continue?</p> <p>Yes No</p>

Once you select Yes, your plan will change back to Draft status and the Recall button will change to a Submit for Approval button.

At this point the Recall button reappears, because the plan is now pending approval. If you find you need to make additional changes before your supervisor approves the plan, you must first recall the plan.

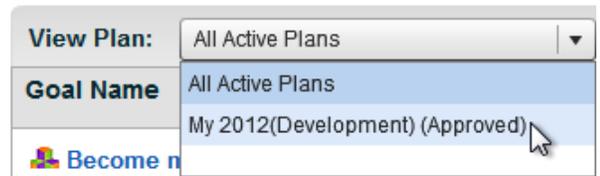
## Updating the Status of an Activity or Goal

The status of internal activities (those created using AgLearn Courses) will be automatically updated for us as you complete the course. External activities will need to be updated by you as will the associated goal. The following steps show you how to update an external activity and then how to update the status of a goal once all associated activities have been completed.

Step	Activity	View
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- From the My Goals Workspace, select the plan you would like to update.  
**Note:** The plan must be in Approved status. Plans that are in Pending Approval status cannot be edited unless recalled.

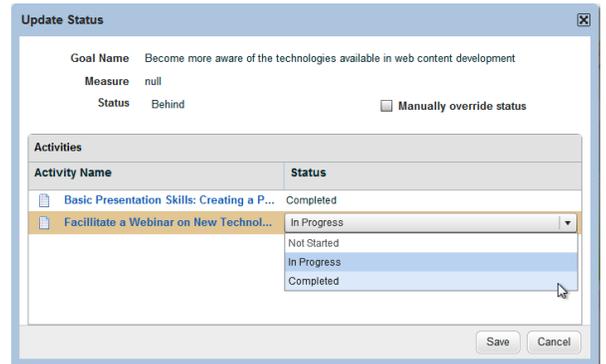
### My Goals Workspace



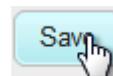
- Hover your mouse over the goal you wish to update and select **Update Status**.



- In the Update Status window, select the activity's new status from the corresponding drop-down list.



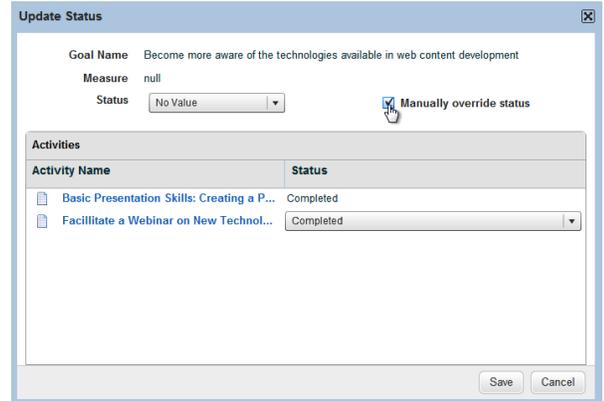
- Select **Save**.



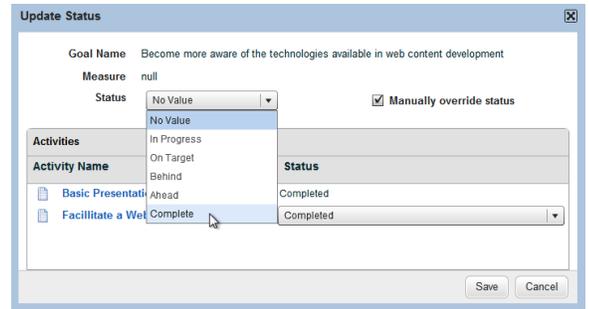
Notes

Updating the Status of an Activity or Goal

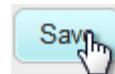
- When all goal activities have been completed, you can now update the status of the goal as Completed. In the Update Status window, select **Manually override status**.



- From the Status drop-down list, select **Completed**.



- Select **Save**.



- In the My Goals Workspace, your goal status now shows as **Complete**.

Goal Name	Plan Name	Plan Status	Target Date	Goal Status
Become more aware of L...	My 2012(Development)	Approved	2/14/2012	Complete
Become more proficient L...	My 2012(Development)	Approved	3/15/2012	Behind