

Job Aid: Accessing My Plan Page

Core Concepts

The My Plan page is a single page that lists activities such as courses or certifications that have been assigned to you or that you have registered for. It can be thought of as an outstanding to-do list. Depending on which modules you have purchased and enabled, there can be up to 4 different sections of the plan including the following:

- Goals & Objectives
- Skills Development
- Learning & Certifications
- Reviews, Meetings, & Interviews

Plan items can be filtered based on criteria like type, status, or list. There is also a **List View** and **Calendar View** option for viewing and managing your activities.

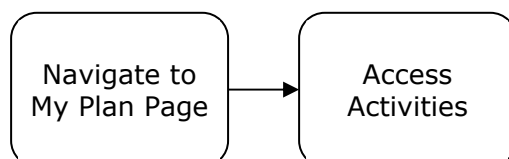
How do I filter my plan items?

If you have a long list of plan items, then you can use the filters on the plan page to easily find the plan items that you are looking for.

1. Click **Me > Plan**. The **My Plan** page opens.
 2. If you don't see the filters below the plan category, then click **Show filters**. The filters for the selected plan category appear.
 3. Specify your filter criteria.
 4. Click **Apply filters**. The plan items matching the filter that you have specified are listed.
- ➡ *Note: The criteria on which you can filter your plan items depends on the plan category and items in it.*

Process

Process flow



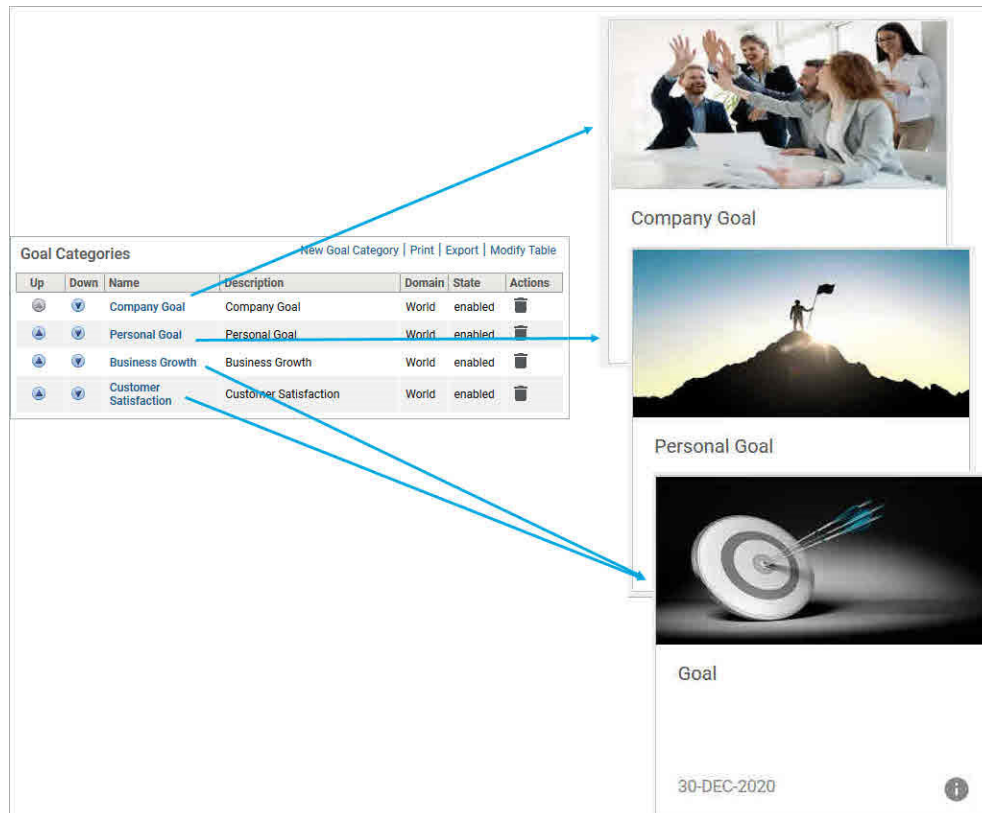
Process steps

Step	Action
1. Navigate to My Plan Page	• Navigate to: Menu > Me • The My Plan page displays.
2. Access Activities	• Click on the desired section to access activities relating to that section such as Learning & Certifications. • Click on the name link for the item or use the Actions drop-down to perform the desired action for that item.

Additional Information

In the Update 47 release (July 2020), there is a new My Plan page that is in Beta. It includes new goal cards and images for goal categories:

- Company goals – common goals assigned to all users of the organization
- Personal goals – goals that an employee wants to accomplish
- Other goals – any other goals



Up	Down	Name	Description	Domain	State	Actions
		Company Goal	Company Goal	World	enabled	
		Personal Goal	Personal Goal	World	enabled	
		Business Growth	Business Growth	World	enabled	
		Customer Satisfaction	Customer Satisfaction	World	enabled	

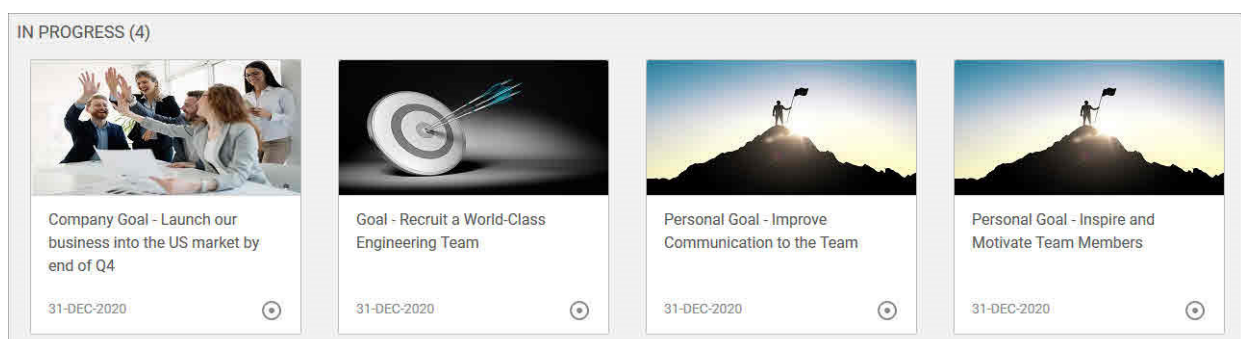
Company Goal

Personal Goal

Goal

30-DEC-2020

Here is how they look on the new My Plan page:



IN PROGRESS (4)

Company Goal - Launch our business into the US market by end of Q4

31-DEC-2020

Goal - Recruit a World-Class Engineering Team

31-DEC-2020

Personal Goal - Improve Communication to the Team

31-DEC-2020

Personal Goal - Inspire and Motivate Team Members

31-DEC-2020

🔔 **Note:** In this update, you are unable to customize the image.

References

- Saba Online Help
- http://sabacloud.com/support/index.php/Main_Page