

## Job Aid: Accessing Learning Plans

### Core Concepts

Learning plans allow you to track and report progress on activities that are important to your organization's success. A learning plan's details include the approval policy, plan status, activities and plan start and end dates among other information.

The actions available to you in the learning plan depend on the plan status and how the plan was designed to behave, i.e. the plan's policies.

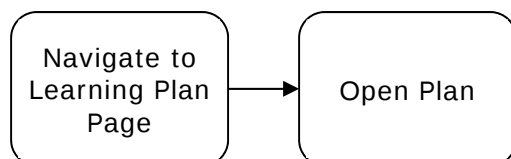
Below are learning plan statuses with a brief description.

➡ *Note: Plans do not need to go through all statuses.*

- **Draft:** Status of a performance plan upon initial creation or when making changes. Both managers and employees can perform changes in this status. Such changes include adding, removing or updating progress for activities.
- **Activated:** Status of a performance plan that has been submitted and either formally approved or acknowledged, if necessary. In plans with a Formal approval policy, changes are limited to activity progress updates. In plans with an Acknowledgment approval policy, making a change other than updating activity progress automatically changes the status to Pending Acknowledgment.
- **Pending Approval:** Only applicable to plans with a Formal approval policy. The plan remains in this status until all designated approvers formally approve the plan. Changes in this status are limited to activity progress updates.
- **Pending Acknowledgment:** Only applicable to plans with an Acknowledgement approval policy. The plan will remain in this status until all designated approvers acknowledge they've seen the plan.
- **Rejected:** Only applicable to plans with a Formal approval policy. The plan has been declined by an approver and will remain in this status until it has been re-submitted for approval. Changes in this status include removing or updating progress for activities. Adding new activities must be done in Draft status.
- **Cancelled:** An administrator has cancelled the plan. No changes can be made.
- **Completed:** Depending on the plan's policy, either employee or manager has marked the plan complete. Individual activities may or may not be 100% complete. No changes can be made.

### Process

#### Process flow



### Process steps

| Step                     | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Navigate to Plan Page | <ul style="list-style-type: none"> <li>Navigate to: <b>Menu &gt; Me</b></li> <li>The <b>My Plan</b> page displays.</li> <li>Click <b>Learning and Certifications</b> to display all of your planned courses.</li> <li>Note: By default the <b>My Plan</b> windows displays all current pending action and in-progress items. Current plans are in Draft, Activated, Pending Approval, Pending Acknowledgement or Rejected status. You can use the filters to show only pending items.</li> </ul> |
| 2. Open Plan             | <ul style="list-style-type: none"> <li>In the <b>Plan Name</b> column, click the title of the plan to open and view the plan's activities. The <b>Plan Details</b> page displays.</li> </ul>                                                                                                                                                                                                                                                                                                     |

## Additional Information

### 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.

- Click **[App Menu] > Me > Plan**. The **My Plan** page opens.
- If you don't see the filters below the plan category, then click **Show filters**. The filters for the selected plan category appear.
- Specify your filter criteria.
- Click **Apply filters**. The plan items matching the filter that you have specified are listed.

The filters that you can apply for are as follows:

| Plan Category             | Filter                       | Criteria                                                                                                                                                                                  |
|---------------------------|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Learning & Certifications | <b>Type</b>                  | Choose one of the following from the dropdown: <ul style="list-style-type: none"> <li>Course</li> <li>Certification</li> <li>Curriculum</li> <li>Evaluation</li> <li>Checklist</li> </ul> |
|                           | <b>Status</b>                | Choose the appropriate status depending on the type of learning you selected.                                                                                                             |
|                           | <b>Due date on or before</b> | Specify the due date.                                                                                                                                                                     |
|                           | <b>Due date on or after</b>  | Specify the due date.                                                                                                                                                                     |

|  |                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <b>Filter by list</b> | Select a list name to view only those learning and certifications in your plan that belong to the selected list.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|  | <b>Source</b>         | <p>Select the source who assigned the learning items to the learner.</p> <p>Learners can filter their learning items using the following source filters:</p> <ul style="list-style-type: none"> <li>• Job</li> <li>• Role</li> <li>• Manager (Includes manager, indirect manager, and alternate manager)</li> <li>• Self</li> <li>• System (Includes prescriptive rule and new user sign-up)</li> <li>• Person (Includes people administrator)</li> </ul> <p>The source of assignment is displayed below each learning item in the filtered results.</p> |
|  | <b>Organization</b>   | Select the organization that is assigned through position management. Learning items belonging to that organization will be displayed in the search results.                                                                                                                                                                                                                                                                                                                                                                                             |
|  | <b>Job Type</b>       | Select the job type that is assigned through position management. Learning items associated with the job type will be displayed in the search results.                                                                                                                                                                                                                                                                                                                                                                                                   |

## References

- Saba Online Help
- [http://sabacloud.com/support/index.php/Main\\_Page](http://sabacloud.com/support/index.php/Main_Page)