

# Individual Development Plan for Employees

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An Individual Development Plan (IDP) allows users to create, delete, and categorize goals, add learning from a catalog, add custom learning activities and delete learning from a plan.

The following tasks are covered in this job aid:

- [Create Goals](#)
- [Add Learning Activities to the Goals](#)
- [View OLU Training Details](#)
- [Verifying Learning Assignments](#)
- [Create Custom Learning Activity](#)
- [Searching by Competency](#)
- [Add, Edit, Delete Comments to a Goal](#)
- [Deleting a Learning Activity](#)
- [Deleting a Goal](#)

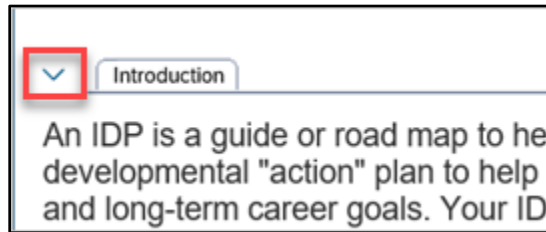
## Create Goals

1. [Log into OLU](https://hcm03.ns2cloud.com/sf/?company=GSAHCM03&loginMethod=SSO#/login)  
(<https://hcm03.ns2cloud.com/sf/?company=GSAHCM03&loginMethod=SSO#/login>)
2. Select the navigation drop-down at the top of the screen and select the **Career Development** link.



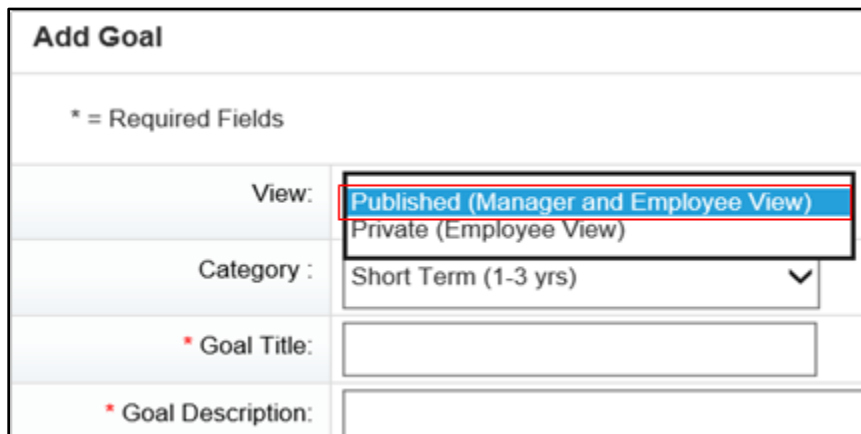
Note: Depending on the configuration of your personal starting page the navigation drop-down at the top of the screen may appear different.

- The IDP screen appears with the Introduction window displayed. If you want to hide this section, select the arrow to the left of the Introduction tab.



- To start your IDP, select the **+Add Goal** button that is displayed above the Introduction window.
- In the **Add Goal** window, select the **View** drop-down and select **Published**.

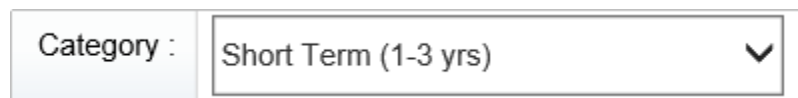
**Note:** When selecting **View** type, if **Private** is selected then only the user has the ability to see the goal. When **Published** is selected the user and the manager can see the goal.



The image shows the 'Add Goal' form. At the top, it says '\* = Required Fields'. The 'View:' dropdown menu is open, showing two options: 'Published (Manager and Employee View)' (highlighted in blue) and 'Private (Employee View)'. Below this, the 'Category:' dropdown is set to 'Short Term (1-3 yrs)'. There are also empty text boxes for 'Goal Title:' and 'Goal Description:'.

- Choose the appropriate drop-down: **Category (Short Term, Long Term, Archived)**.

**Note:** Only use the Archived Category when you have completed the goal.



The image shows a close-up of the 'Category:' dropdown menu, which is currently set to 'Short Term (1-3 yrs)'.

7. Enter a title for your goal in the **Goal Title** field.

* Goal Title:	<input type="text"/>
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8. Enter a description for your goal in the **Goal Description** field. The text field will automatically resize as needed.

* Goal Description:	<input type="text"/>
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9. The **Goal Start Date** and **Goal End Date** fields automatically default to the beginning and end dates of the current fiscal year. Selecting either date will display a calendar that will let you choose a starting date or ending date for your goal.

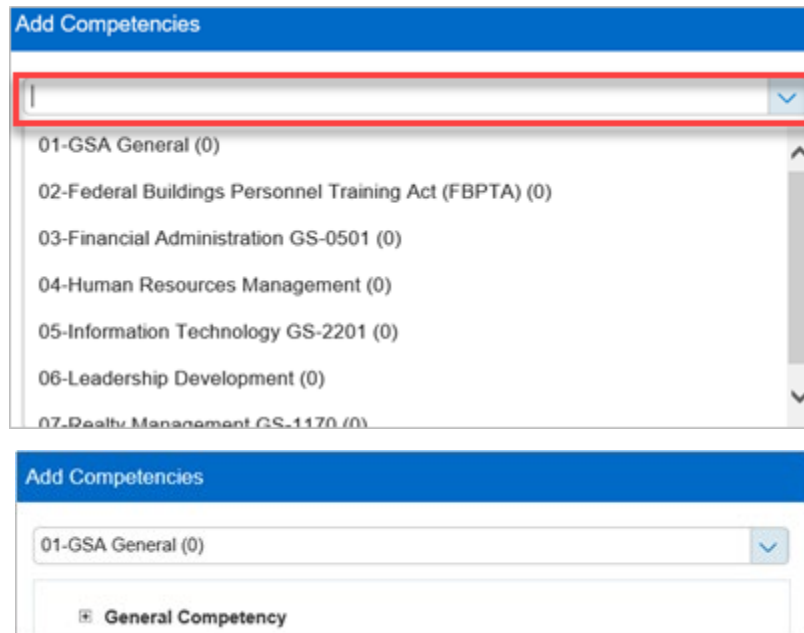
Goal Start Date:	<input type="text" value="10/01/2020"/>
Goal End Date:	<input type="text" value="09/30/2021"/>

10. Select the link **Select link to add competencies**.

Competencies:	<input type="text"/>
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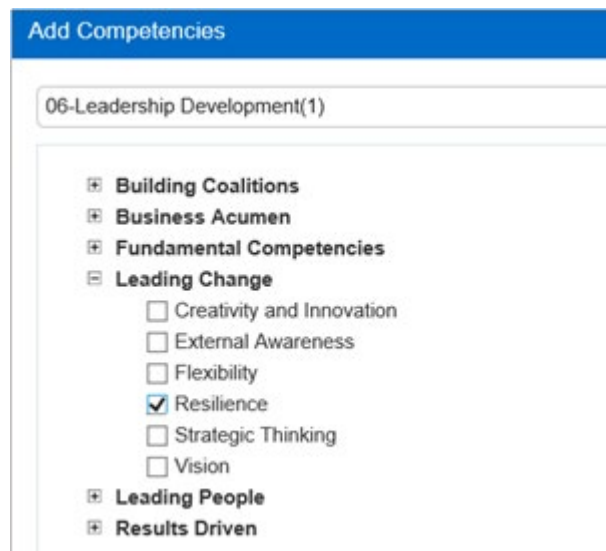
[Select link to add competencies](#)

11. Select the drop-down arrow next to the library called **01-GSA General (0)** and view the other competency libraries that are available.



12. The list displayed shows the categories available for the library you selected.

Select the plus symbol (+) next to a category. In this example, the **Leading Change** category has been selected.



Select the checkbox next to any competency displayed in the list. In this example, the **Resilience** competency is selected.

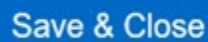
**Note:** You can select any competency of your own choosing – this is an example of a competency linked to an OLU learning item.

13. Choose the **Select** button at the bottom right of the window.



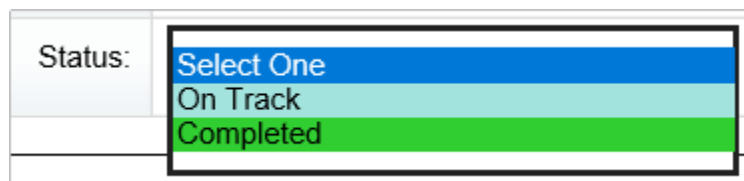
Select

14. Select the **Save & Close** button at the bottom right of the window.



Save & Close

15. Select the **Status** drop-down and select any status. In this case, **On Track** will be selected.



Status: Select One  
On Track  
Completed

16. The **Individual Development Plan** screen is displayed.

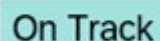


Short Term (1-3 yrs)							
View	#	Goal Title	Goal Description ↓	Competencies	Goal Start Date	Goal End Date	Status

To confirm that the values you entered have appeared as they should, view the data below the header fields:

- **Goal Title**
- **Goal Description**
- **Competencies**
- **Goal Start Date**
- **Goal End Date**

If you chose the status of **On Track** it should have a light blue background.



On Track

17. In the **Comments** field that displays below the goal you just created, enter text, and select **Post**.

Further information on comments will be provided in **Add, Edit, Delete Comments to a Goal** section of this job aid.



## Add Learning Activities to the Goals

You can access the OLU catalog directly from the IDP. From the catalog you can associate OLU training to your IDP goal. If the competency selected within your goal is already associated with OLU training, you can search for it based on the competency. Finally, you can add custom learning activities to the goal that are not found in the OLU. In this task you will see three ways to add learning to a goal.

**Note:** Not all competencies are linked to OLU Learning Items.

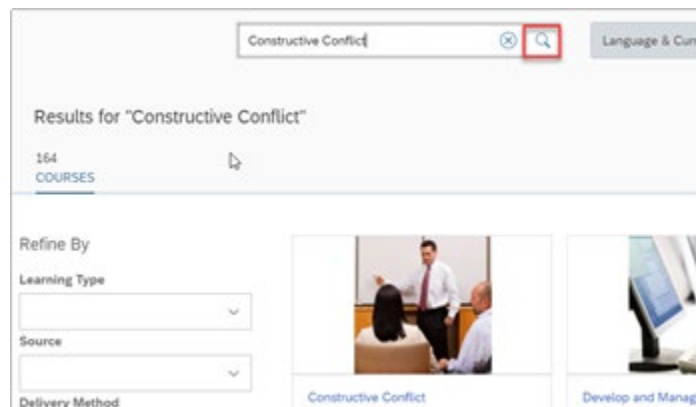
1. If you aren't on the **IDP** screen, select the navigation drop-down at the top of the screen and select the **Career Development** link.



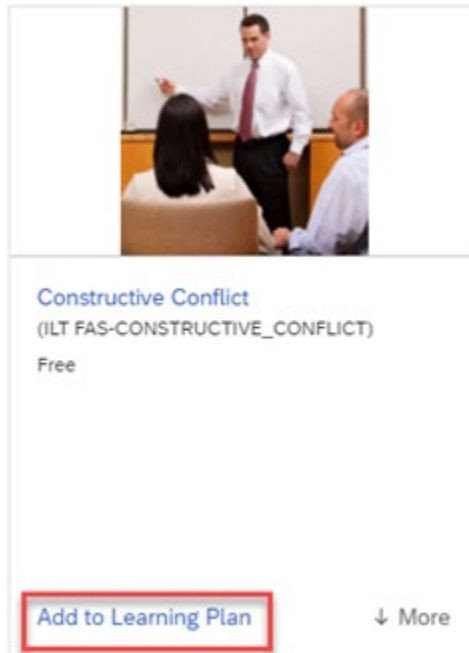
2. From the IDP window locate any goal in your IDP to assign specific OLU training.
3. Select the link **+Add to Learning Activities** and the **Find in OLU Catalog**.



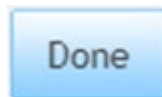
4. Type an OLU training title (e.g., **Constructive Conflict**) in the search field and select the magnifying glass to search.



5. For the OLU training, (e.g., **ILT FAS-CONSTRUCTIVE\_CONFLICT**), select **Add to Learning Plan**.



6. Select the **Done** button at the bottom of the catalog window.

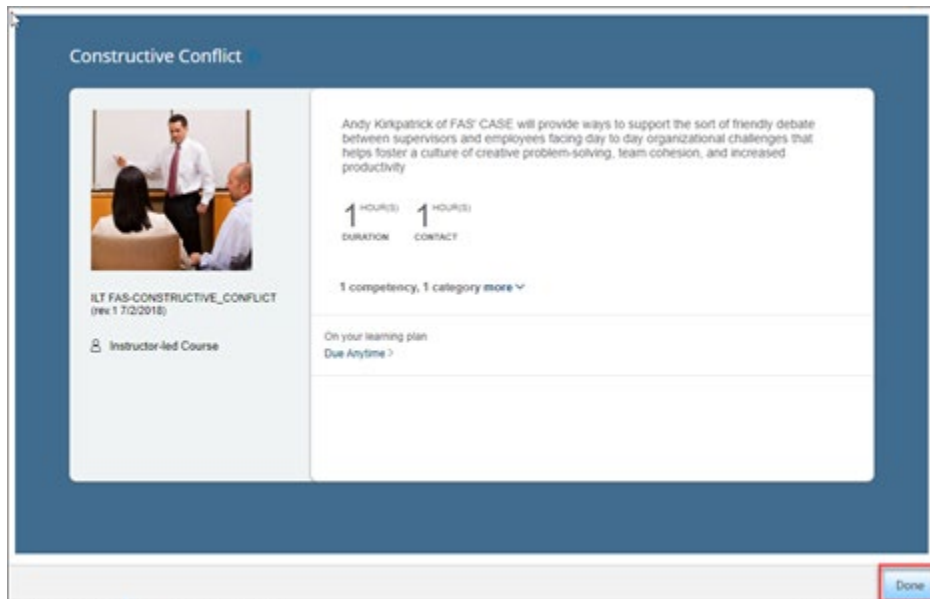


7. To view the details of the OLU training, select the **"i"** icon to the right of the **Activity Name**. View the details of this item.



8. Select the **Done** button after viewing the OLU training details.





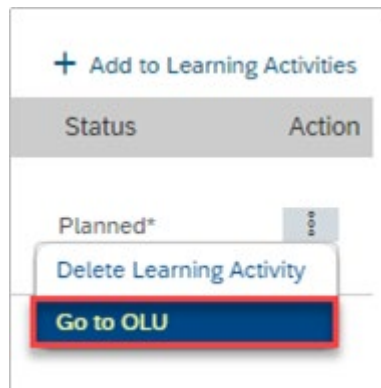
**Note:** The course is then added to the users **My Learning Assignments** section as Self Assigned.



## View OLU Training Details

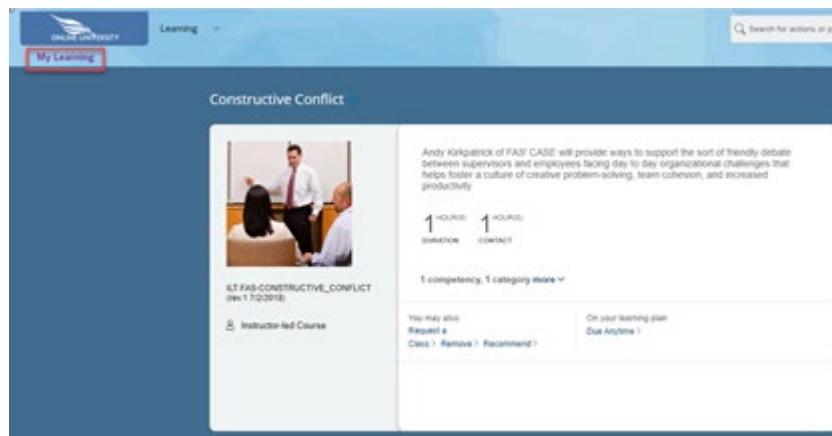
1. Navigate back to the IDP by selecting the **Career Development** link. To navigate to the learning window, select the ellipses (3 vertical dots) to the right of the OLU training and select **Go to OLU**.

**Note:** Selecting on **Go to OLU** will take you to OLU to view the learning.



2. View the details of the OLU training.

Select the **My Learning** sub-menu in the upper left-hand corner to navigate to the learning home screen and locate the OLU training that you assigned through the IDP. You may need to scroll to the bottom of your **My Learning Assignments** tile to see the OLU training.



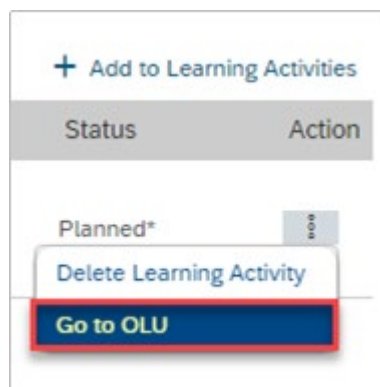
## Verifying Learning Assignments

1. Navigate back to the IDP by selecting the **Career Development** link. To navigate to the learning window, select the ellipses (3 vertical dots) to the right of the OLU training and select **Go to OLU**.

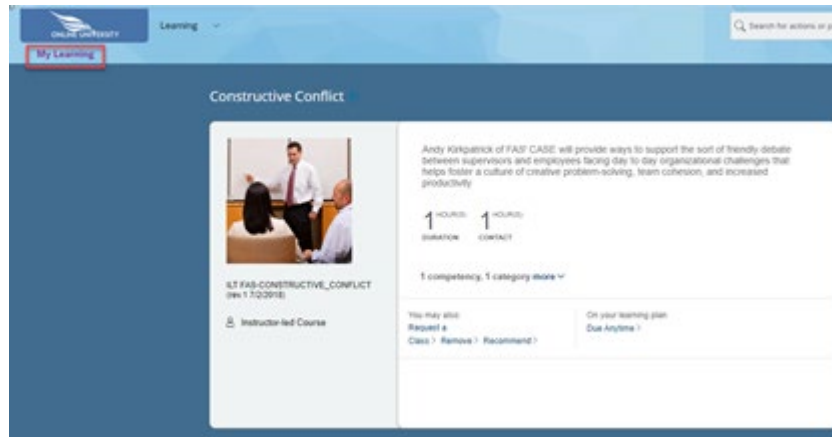


2. To navigate to the **Learning Activities** section of the goal you just edited, select the ellipses (3 vertical dots) to the right of the OLU training and select **Go to OLU**.

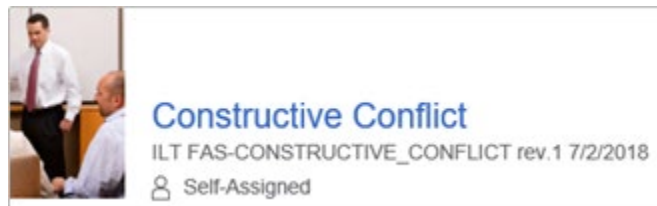
**Note:** Selecting on **Go to OLU** will take you to the OLU to view the learning.



3. Select the **My Learning** sub-menu to navigate to the learning home screen.



4. Locate the OLU training that you assigned through the IDP. You may need to scroll to the bottom of your **My Learning Assignments** tile to see the OLU training.



## Create Custom Learning Activity

1. Navigate back to the IDP by selecting the **Career Development** link. To navigate to the learning window, select the ellipses (3 vertical dots) to the right of the OLU training and select **Go to OLU**.

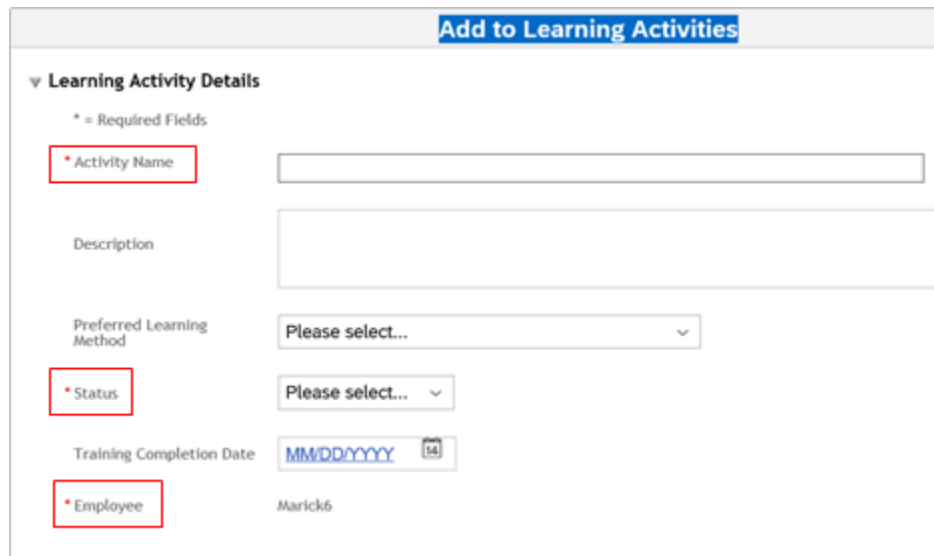


2. Locate any goal in your IDP to add a custom learning activity. Select the link **+Add to Learning Activities**.

Then select **Create Custom Learning Activity**.

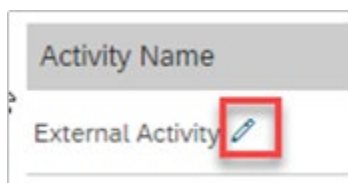


3. Fill out all fields with the **red asterisk**. The other fields are optional.



A screenshot of the 'Add to Learning Activities' form. The form is titled 'Add to Learning Activities' and has a section for 'Learning Activity Details'. A legend indicates that an asterisk (\*) denotes required fields. The following fields are marked as required with red boxes: 'Activity Name', 'Status', and 'Employee'. Other fields include 'Description', 'Preferred Learning Method', and 'Training Completion Date'. The 'Employee' field is pre-filled with 'Marick6'.

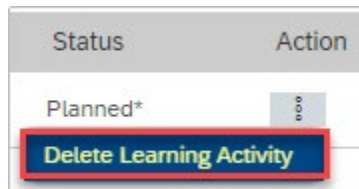
4. To edit this activity, select the **pencil icon** to the right of the **Activity Name**.



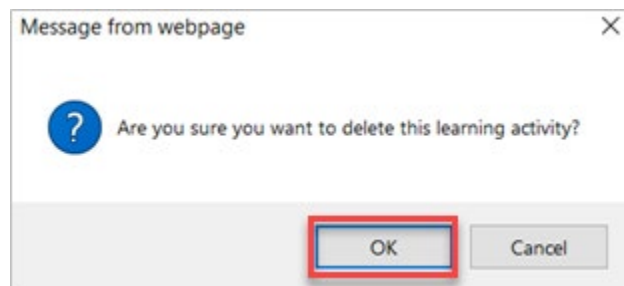
5. Make changes needed and select the **Save button**.



- On the far right, select the vertical ellipsis (3 dots) to delete this activity. Select **Delete Learning Activity**.



- Select **“OK”** in the pop-up message.



## Searching by Competency

Not all competencies are directly related to OLU learning. This task will either allow you to select competency related OLU training or provide you with a screen stating that you need to search the OLU catalog for training that meets your needs. If the competency selected within your goal is already associated with OLU training, you can select it in the window that appears.

- From the IDP home screen, locate the goal with one or more competencies assigned.

View	# Goal Title	Goal Description	Competencies	Goal Start Date	Goal End Date	Status	Action
Published (Manager and Employee View)	11 Competency Test	Competency Test	Creativity and Innovation, External Awareness, Flexibility, Resilience	10/01/2020	09/30/2021	Select One	

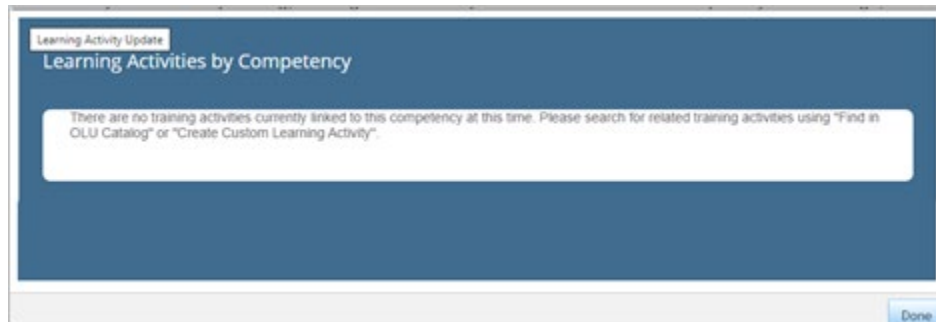
**Note:** You should see at least one competency listed under the **Competencies** header before going to the next step.

2. Select the link **+Add to Learning Activities**. Then select **Search by Competency**.

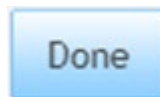


**Note:** Any competencies that are returned in the **Search By Competency** search are those that are mapped in the OLU to specific training.

3. If you receive a screen that says **“There are no training activities linked to this competency at this time. Please search for related training activities using “Find in OLU Catalog” or “Create Custom Learning Activity”**, there is no associated OLU training mapped to this competency.

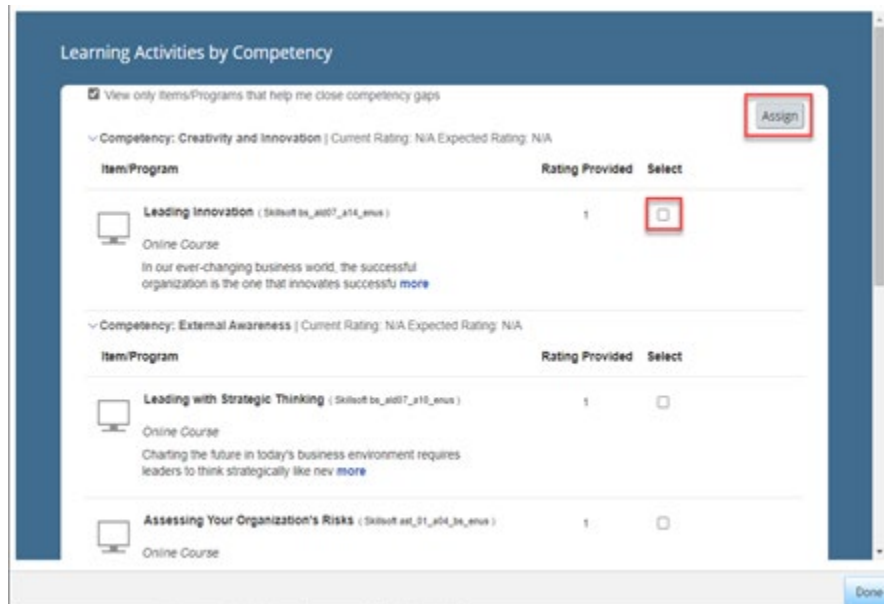


If you see this screen, select the **Done** button. and either go back to the step on assigning competencies or go to the next task.

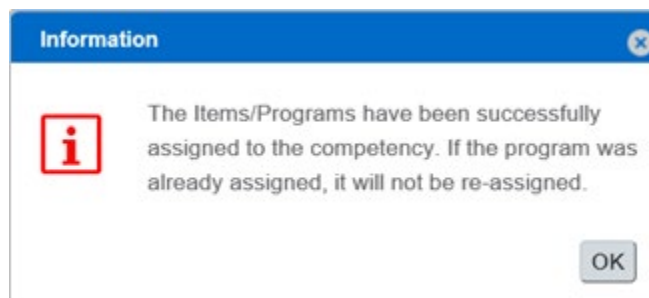


**Note:** Any competencies that are returned in the **Search By Competency** search are those that are mapped in the OLU to specific training.

4. Select the checkbox to the right of a learning item. Then select the **Assign** button at either the top or bottom of the screen. Wait for the Information dialog window to appear.



5. In the Information dialog window select **OK**.



6. In the **Learning Activities by Competency** pop-up window, select the **Done** button.





## Add, Edit, Delete Comments to a Goal

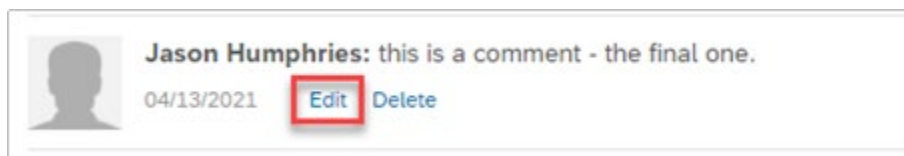
1. Select the navigation drop-down at the top of the screen and select the **Career Development** link.



2. From the IDP window you should see goals that you have created earlier. Locate any goal in your IDP. For this goal, you will add a comment. Enter your comment in the **Comment** field. Select the **Post** button.

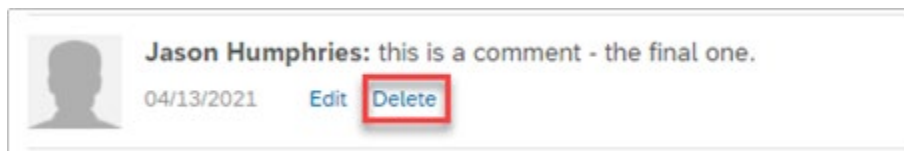


3. To edit the comment, select the **Edit** link to make changes. When you are finished, select the **Post** button.

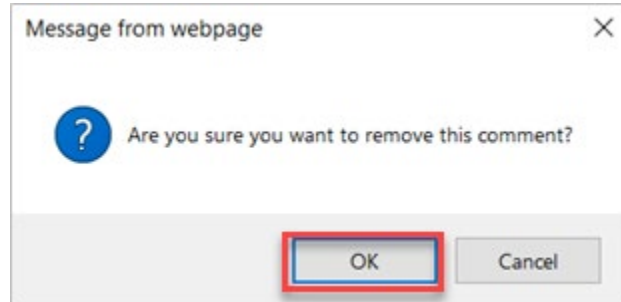


**Note:** As a user, you can **Edit** and **Delete** your own comments but can only view the comments from the manager.

4. To delete the comment, select the **Delete** link.



5. A dialog window will appear **“Are you sure you want to remove this comment?”**  
Select the **OK** button.



**Note:** As a user, you can **Edit** and **Delete** your own comments but can only view the comments from the manager. Emails are generated to the manager when you post comments.

Your manager will receive an email after you post a comment as long as your goal has the View field set to Published. In turn, you may also receive an email when your manager posts a comment.

## Deleting a Learning Activity

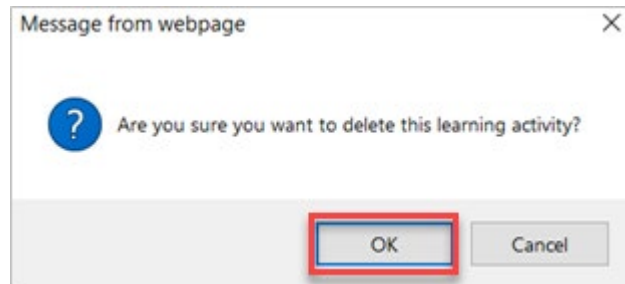
1. Navigate back to the IDP by selecting the **Career Development** link.



- From the IDP home screen, locate the goal with the OLU training you just added. You will want to delete the activity you added (as if you added it in error). Select the ellipses (3 vertical dots) to the right of the OLU training and select **Delete Learning Activity**.



- The dialog window will appear: **Are you sure you want to delete this learning activity?** Select **OK**.



## Deleting a Goal

- Navigate back to the IDP by selecting the **Career Development** link.



- Locate the goal you want to delete. On the far right of the goal, under the Actions header, select the vertical ellipsis (3 dots). Select **Delete** goal from the dropdown.

View	#	Goal Title	Goal Description	Competencies	Goal Start Date	Goal End Date	Status	Action
Private (Employee View)	1.4	Communication	Communicating to my Manager	Agility; Creativity and Innovation	10/01/2020	09/30/2021	On Track	<a href="#">Edit goal</a> <a href="#">View goal details</a> <a href="#">Delete goal</a>

Learning Activities

3. Select **OK** in the dialog box to delete.

