

Managing Learning Plans

The **Learning Plans** block on the Record of Learning tab contains a list your Learning Plans. Learning plans are grouped into **Active**, **Unapproved**, and **Completed**, and they are displayed chronologically.

The way learning plans work in your organisation is determined by the learning plan template set by the site administrator. See [Templates](#) to learn more.

 You will also need to ensure that the Learning Plan enrolment plugin is enabled, by default this is turned off. You can read more in the [Enrolments](#) page.

Create a learning plan

To assign a learning plan to a user you need to go to their profile. If you wish to bulk assign a learning plan to a group of people then this can be done via audiences, see the [Auto-create learning plans](#) section below.

1. Select **Learning Plans** and select **Create new learning plan**.
2. Choose a **Plan template**.
3. Enter the **Plan name**, **Plan description**, **Date started** and **Completion date**.
4. Select **Create plan**.

Permissions for a learning plan will be inherited from the permission settings for the template that plan is based off. Changing the permissions for the learning plan template will affect all plans created from that template.

Learning plan components

Learning plans have a number of components that you can add items to. The components are: courses, competencies, objectives and programs. Depending on how the learning plan template has been set up by your site administrator, you may have access to all components, or just specific ones.

Courses

1. Select the **Courses** tab to view the course options for your learning plan.
2. Select **Add courses** to add a course to your learning plan.
3. Choose the course(s).
4. Your chosen courses appear in the right hand column. Select the **delete** icon to remove a course.
5. Select **Save** to add the course(s) to your learning plan.

 When there are more than 100 courses in the category, you can only use the search function to select courses.

6. Once a course has been added you are able to set the **Priority** and **Due date** (depending on the template settings).
7. Select the **delete** icon to remove a course from your learning plan.

Competencies

1. Select the **Competencies** tab to view the competencies options for your learning plan.

 Your site administrator can set up your learning plan to work in a specific way. For example, they can choose to allow competencies assigned to your position and/or organisation to automatically appear in your learning plan when created.

2. Select **Add competencies** to add a competency to your learning plan.
3. Choose the competency framework you wish to add competencies from.
4. Choose the competencies you wish to add.
5. Your chosen competencies appear in the right hand column. Select the **delete** icon to remove a competency.
6. Select **Continue**.
7. When you select a competency with a course assigned as an evidence item, the course(s) are displayed and selected by default. Uncheck the checkbox to prevent the course(s) being added to your learning plan.
8. Select **Save** to add the competencies and course(s) to your learning plan.

On this page



The Totara Academy has a whole course dedicated to using [Learning plans](#) in Totara Learn. Here you can learn more on how to use learning plans, see best practice, and give it a go yourself.



When there are more than 100 competencies in the framework, you can only use the search function to select competencies.

9. Once a competency has been added, you are able to set the **Priority** and **Due date** (depending on the template settings).
10. Select the **delete** icon to remove a competency from your learning plan.

Objectives

1. Select the **Objectives** tab to view the objective options for your learning plan.
2. Select **Add new objective** to add an objective to your learning plan.
3. Enter an **Objective title** and **Objective description**.
4. Set a **Priority**, if available.
5. Set a **Status**, if available.
6. Select **Add objective**.
7. Once an objective has been added you are able to set the **Priority**, **Status**, and **Due date** (depending on the template settings).
8. Select the **delete** icon to remove an objective from your learning plan.

Programs

1. Select the **Programs** tab to view the program options for your learning plan.
2. Select **Add programs** to add a program to your learning plan.
3. Choose the programs you wish to add.
4. Your chosen programs appear in the right hand column. Select the **delete** icon to remove a program.
5. Select **Save**.



When there are more than 100 programs in the category, you can only use the search function to select programs.

Submitting a learning plan for approval

Once you have completed the plan, select **Send approval request** to submit your plan for approval. A notification is sent to your manager(s) and a new task appears in their **Tasks** block.

When your manager approves or declines your plan a notification is sent to you.



Approval and multiple job assignments

If you have multiple job assignments linked to different managers, approval requests and other learning plan notifications go to all of your managers. All of your managers have the ability to approve, decline or delete your learning plan and its components (depending on your plan permissions).

The first manager to act on any approval will be successful and other managers will see that approval has already occurred.

Auto-create learning plans

1. Go to *Site Administration > Users > Accounts > Audiences* and create a dynamic audience.
2. Add a rule to select some users.
3. Go to the **Learning plan** tab to create new learning plans for all members in the audience.
4. The **Plan template** option will allow you to pick the template you want the users' plan to be based on.
5. The **Exclude users who** option lets you define audience members who shouldn't get a new plan created. If a user meets any of the excluded criteria, a plan won't be created for them.
6. The **Create new plans** as option lets you define the status of newly created plans (draft or active).
7. You can also choose to **Automatically create a new learning plan for every new user who becomes a member of this audience**.
8. Select **Save and create plans**.

When you select **Save and create** plans, you will see a confirmation dialog explaining how many users will be affected and giving you the chance to confirm. If you continue, the plans will be created and you will get a confirmation message. The history table will also be populated to show what was done. If no users meet the plan creation criteria i.e. there is no-one in the audience, or all users meet the exclusion criteria, then the confirmation dialog will display **No users require having learning plans created**, the settings will be saved and the history table will be populated to show what was done. If the **have an existing, automatically created plan based on this template** option for the **Exclude users who** setting is not set, automatic creation of learning plans will not be available. If a user is removed from the audience any learning plans already created will not be affected.

It may take a few moment for the new learning plan to appear (depending on the frequency of your cron).

Editing a learning plan

Before a plan is submitted for approval you can go in and add or remove courses, competencies, and objectives.

Once you have submitted your learning plan for approval, what you can edit depends on how your Totara site administrator has set up the workflow for the learning plan template being used.

Select **Add courses**, **Add competencies**, and **Add new objective** to add an item to the learning plan. When an item is added to an approved plan, a notice of a draft item appears. Select **Send approval request** to request approval of the added item.

Learning plan comments

Learning plans have a comments section, which allows a dialogue between the learner and their manager (s). Comments can be added to the plan as a whole and to each individual item (course, competency, etc.) in the plan. Comments appear in a linear list and comment notifications are emailed to the users involved in the conversation. This would typically be the learner and the manager, although comment notifications will also be sent to other users who have participated in a conversation e.g. a previous manager.

To add a comment on a team member's learning plan:

1. Select **Learning Plans**.
2. Select the plan you want to comment on.
3. Type in the comment.
4. Select **Save comment**.
5. A history of the saved comments will be kept on the learning plan.

Viewing learning plans

Learning plans are viewable by the learner's manager(s), temporary manager(s) and site administrators.

Viewing learning plans as a manager/temporary manager

As a manager you are able to view the learning plans for all your direct reports. The permissions you have when viewing your team members' learning plans are defined in the learning plan template set by the administrator.

View learning plans

1. Select **My Team** on the navigation bar.
2. Select **Plans** under each staff member to view all their learning plans. You are able to see all completed and active learning plans for each staff member.
3. Select the name of the plan to view the details of the plan.

Approving a plan

You are notified when a learner submits a plan for approval. When viewing a plan which requires approval, the approve and decline buttons appear on the learning plan overview page and in a box above the plan when viewing the plan details.



Approval and multiple job assignments

If your team member has multiple job assignments linked to different managers, approval requests and other learning plan notifications go to all of their managers. The first manager to act on any approval will be successful and other managers will see that approval has already occurred.

Note that whilst you will be able to see approval status changes completed by another manager, you will not be notified that it has been completed and approval tasks will remain on your dashboard until dismissed.

Learning plan comments

To add a comment on a team member's learning plan:

1. Select **My Team** on the navigation bar.
2. Select **Plans** under the staff member.
3. Select the plan you want to comment on.
4. Type in the comment.
5. Select **Save comment**.
6. A history of the saved comments will be kept on the learning plan.

Viewing learning plans as an administrator

As an administrator you have the ability to view and edit all users' learning plans.

To view a user's learning plan:

1. Select *Users > Accounts > Browse list of users*.
2. Search for the user you want.
3. Select the name of the user to view their user profile.
4. Select **Learning Plans** to view the users learning plans.

As an administrator you have the ability to edit plans, delete plans, create a new plan, reactivate a completed plan, and approve plans.