Learning Plan templates

Introduction

Totara learning plans allow your staff quick and targeted access to relevant learning; including face to face events and e-learning. The learning plan enables staff to see at a glance their progress against specific learning events and the whole plan.

Learning plans are based on a site-wide template. The template is configured by the site administrator. There is a wide range of implementation and configuration options to support the different ways organisations want to use learning plans to support their staff.

You can configure different models of learning plans:

- Competency centric (switch off Objective, Programs & Course assignment)
- Program centric (switch off Objectives, Courses and Competencies assignment)
- Competency/Objective model (switch off Course and Program assignment)
- Hybrid model allows mixture of Competencies, Courses, Programs and Objectives.\

Manage Templates

The learning plans your staff create are based on a template created by the Site Administrator. You can have multiple templates set up but there can only be one active template at a time. When you have multiple templates, the active template appears at the top of the 'Manage Templates' list and has '(default)' after the plan title.

Create a New Learning Plan Template

 Learning Plan Templates demonstration

To create a new learning plan template, under the 'New Template' section:

1. Enter the 'Name' of your template.
2. Enter the 'End date' of your template. The end date can be used to automatically complete the learning plans created from this template.
3. Click 'Save changes'.

Your new plan is now created, the next step is to set the components and workflow you want the learning plan template use.

Edit a Learning Plan Template

Click the 'Edit' icon next to the learning plan template you wish to edit.

Note: The changes you make to the learning plan template are applied to all existing and future learning plans created using the learning plan template.

Components

By default a learning plan has four components:

1. **Courses** – the courses the learner is scheduled to complete under the learning plan
2. **Competencies** - the competencies the learner is scheduled to complete under the learning plan
3. **Objectives** – Objectives are a free text field that allow the Manager or Learner to enter objectives which are perhaps not covered by competencies
4. **Programs** - the programs the learner is scheduled to complete under the learning plan

Components can be hidden and the order of the components changed to suit the requirements of your organisation.

- Click 'Hide' to remove a component from the learning plan template
- Click 'Show' to add a hidden component to the learning template
- Click the up and down arrows to change the order of the components

Click 'Save changes' to save your changes on the components tab before leaving the tab.

Workflow

A learner and their manager have access to a learner's learning plan. Workflow settings allow you to control who is able to perform the different tasks related to setting a learning plan up, including:

- Adding courses, competencies, objectives and programs
- Approving a plan
- Completing a plan

Pre-set Workflow settings

There are four pre-set workflow settings and a custom option:

1. **Basic workflow**: Is a simple manager driven workflow. Options such as due date and priority on course, competencies and programs are turned off.
2. **User driven workflow**: In this workflow the learner has control of the learning plan. The Manager is able to view the plan, but is not able to make any changes.
3. **Manager driven workflow**: In this workflow the manager assigns content staff learning plans. The learner can request that content is added, but everything requires manager approval.
4. **Custom workflow**: Allows you to customise all the learning plan workflow settings to meet your requirements. See Advanced Workflow Settings to learn more about custom workflow settings.

Advanced Workflow

- You are here: Home > Administration > Learning Plans > Manage Templates >Advanced Workflow

Using the advanced workflow settings you can define what permissions a Learner and a Manager have when accessing a Learning Plan.

Plan Settings

Plan settings allow you to set how the learning plans are marked as complete. There are three available options:

1. **Manually, by a user with 'complete' permission**: Either the learner or the Manager is able to manually mark the plan complete. This permission is set in Plan Permissions. The Manager has this permission by default.
2. **Automatically, when all items have completed**: The plan automatically completes when all items in the plan have a complete status. A learning plan can be reactivated by an Administrator or a Learner or Manager with 'Complete/Reactivate' status.
3. **Automatically, when the plan completion date has passed**: The plan automatically completes when the end date set on the learning plan has passed. A learning plan can be reactivated by an Administrator or a Learner or Manager with 'Complete/Reactivate' status.

When the Learning Plan is set to automatically complete the 'Plan Complete' message states the reason the plan has been marked as complete.

Plan permissions

The plan permissions allow you to set the global learning plan permissions.

There are four permission levels available:

1. **Allow** allows the user to perform the action.
2. **Deny** prevents the user from performing the action.
3. **Reques**t allows the user to request that this action is performed.
4. **Approve** allows the user to approve an action.

Permissions are further refined for each component.

Remember to click 'Save changes' before moving on to set the component permissions.

Course Settings and Permissions

Course Settings

Course settings allow you customise the settings available for courses.

Select the **'Due dates'** setting:

- **None:** No due date field appears on the learning plan
- **Optional**: The due date field is optional
- **Required**: The due date must be completed

Select the **'Priorities'** setting

- **None**: No priority is set for courses in a learning plan using this template
- **Optional:** A priority can be set if required on courses in a learning plan using this template
- **Required**: A priority must be set on courses in a learning plan using this template

Select a **'Priority Scale'**

- When priorities is set to none a priority scale is not required.

Course Permissions

Course permissions allow you to define the level of actions that can be performed by the Learner and Manager in the learning plan.

There are four permission levels available:

1. **Allow** allows the user to perform the action.
2. **Deny** prevents the user from performing the action.
3. **Request** allows the user to request that this action is performed.
4. **Approve** allows the user to approve an action.

Click '**Save changes**' before leaving this page.

Competency Settings and Permissions

Competency Settings

Competency settings allow you customise the settings available for competencies.

Select the 'Due dates' setting.

- **None**: No due date field appears on the learning plan
- **Optional**: The due date field is optional
- **Required**: The due date must be completed

Select the 'Priorities' setting

- **None:** No priority is set for competencies in a learning plan using this template
- **Optional:** A priority can be set if required on competencies in a learning plan using this template
- **Required**: A priority must be set on competencies in a learning plan using this template

Select a 'Priority Scale'

- When priorities is set to none a priority scale is not required

Set the Automatic assignment

Automatic assignment allows the learning plan to automatically pull through competencies assigned the learners position and organisation, with any courses linked to the competencies.

There are four options you can use to set automatic assignment

1. **Automatically assign by position**: When this option is checked the learning plan automatically pulls competencies assigned to the learner's position into their learning plan.
2. **Automatically assign by organisation**: When this option is checked the learning plan automatically pulls competencies assigned to the learner's organisation into their learning plan.
3. **Include completed competencies**: When this option is checked all competencies assigned to the learners position and/or organisation appear in the learning plan, even if the learner has completed the competency.
4. **Include linked course**s: When this option is checked courses that have been linked to competencies are automatically pulled through into the learning plan.

Set the 'Default Status': By default when a competency is pulled into a learning plan the status field shows as blank. When you check 'Assign newly approved competencies their default status' the default status from the competency scale displays in the learning plan when the competencies is assigned.

Competency Permissions

Competency permissions allow you to define the level of actions that can be performed by the Learner and Manager in the learning plan.

There are four permission levels available:

1. **Allow** allows the user to perform the action.
2. **Deny** prevents the user from performing the action.
3. **Request** allows the user to request that this action is performed.
4. **Approve** allows the user to approve an action.

Click 'Save changes' before leaving this page.

Objectives Settings and Permissions

Objective Settings

Objective settings allow you customise the settings available for objectives.

Select the '**Due dates**' setting.

- **None**: No due date field appears on the learning plan
- **Optional**: The due date field is optional
- **Required**: The due date must be completed

Select the **'Priorities**' setting

- **None**: No priority is set for objectives in a learning plan using this template
- **Optional:** A priority can be set if required on objectives in a learning plan using this template
- **Required**: A priority must be set on objectives in a learning plan using this template

Select a **'Priority Scale'**

- When priorities is set to none a priority scale is not required.

Select an **'Objective Scale'**

- An objective scale is used to measure a learners' progress towards their objectives. Set up objective scales using the menu option under Site Administration > Learning Plans.

Objective permissions

Objective permissions allow you to define the level of actions that can be performed by the Learner and Manager in the learning plan.

There are four permission levels available:

1. **Allow** allows the user to perform the action.
2. **Deny** prevents the user from performing the action.
3. **Request** allows the user to request that this action is performed.
4. **Approve** allows the user to approve an action.

Click **'Save changes**' before leaving this page.

Programs settings and permissions

Program Settings

Select the 'Due dates' setting.

- **None:** No due date field appears on the learning plan
- **Optional:** The due date field is optional
- **Required**: The due date must be completed

Select the 'Priorities' setting

- **None**: No priority is set for programs in a learning plan using this template
- **Optional:** A priority can be set if required on programs in a learning plan using this template
- **Required**: A priority must be set on programs in a learning plan using this template

Select a 'Priority Scale'

- When priorities is set to none a priority scale is not required.

Program permissions allow you to define the level of actions that can be performed by the Learner and Manager in the learning plan.

There are four permission levels available:

1. **Allow** allows the user to perform the action.
2. **Deny** prevents the user from performing the action.
3. **Request** allows the user to request that this action is performed.
4. **Approve** allows the user to approve an action.

Click 'Save changes' before leaving this page.