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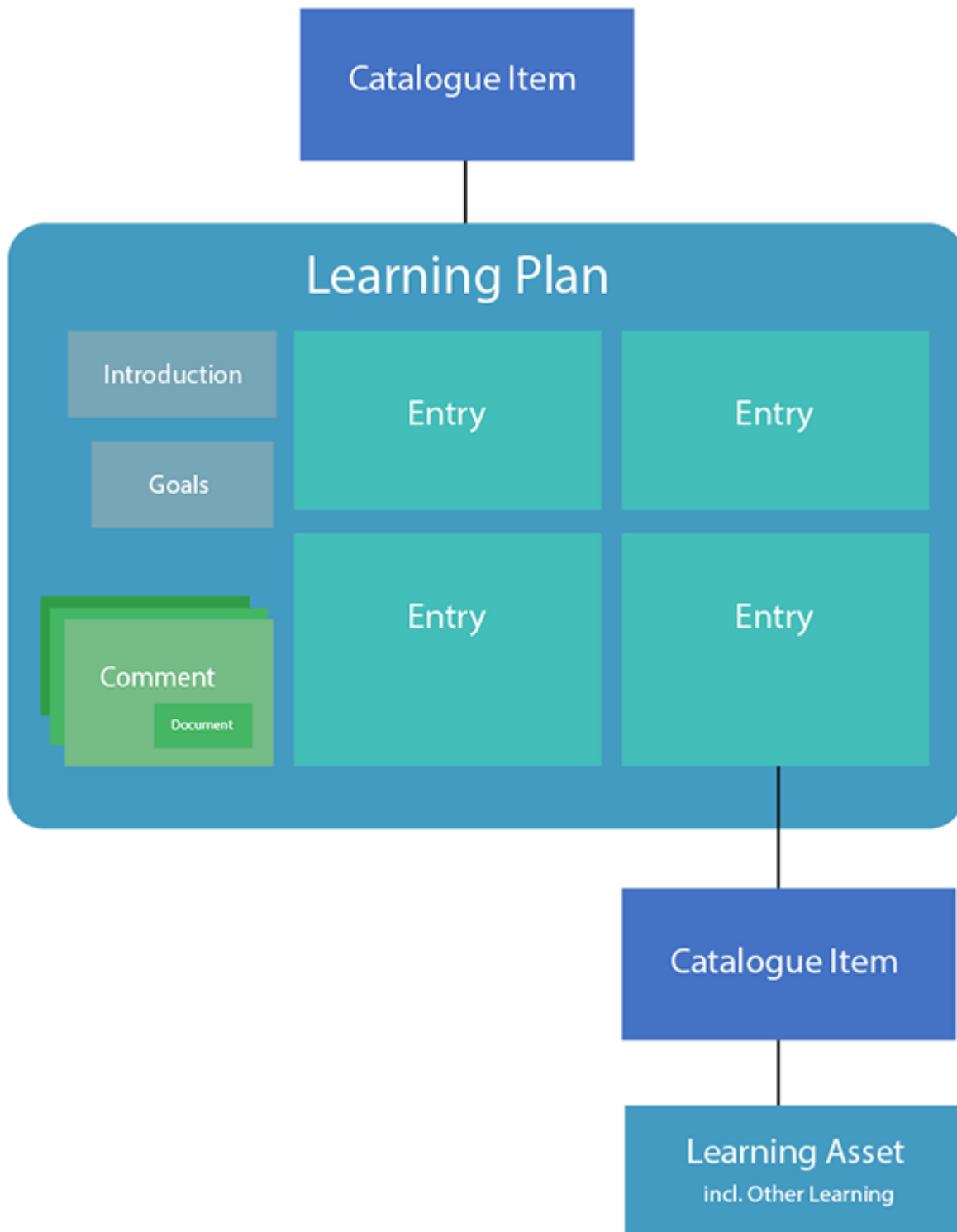
Learning Plan Introduction

A Learning Plan is a kind of enhanced learning journal for an individual. Learning Plans are often established for a particular period of time and can be subject to manager involvement.

The plan starts with an analysis of the knowledge and skills the learner needs in order to achieve career and personal goals. The most significant components of the plan are a series of **entries** specifying and logging the achievement of specific learning objectives and optionally linked to learning inside or outside the CLS. The plan also contains space for a number of personal comments and linked professional documents.

Thus, a Learning Plan is personal to the learner and contains:

- an introduction by the plan's creator, i.e. the manager of the learner;
- a statement about the learner's broad goals and direction;
- a number of Learning Plan Entries: sets of specific learning objectives and activities; and
- a journal made of a number of different kinds of comments.



In Learning Plan Entries the learner details a number of specific objectives that they would like to accomplish. Each entry has a number of parts:

- a description of the learning objective.
- the action the learner will take to meet that objective.

Learning Plans

- a date by which the learner would like to meet that objective.
- (possibly) the date on which the learner says that s/he has met that objective.
- (possibly) links to Catalogue Item(s) the learner will complete or has completed to help meet this objective.
- (possibly) links to external learning conducted outside the CLS.
- an indicator of the completeness of the entry.

Learning Plan Entries can be added or removed by the learner as desired, unless they have been made mandatory by an administrator, [see Default Learning Plan Entries](#). Managers can add entries and Tag Types to a plan in order to direct and guide the learning of their staff. Managers can also add new entries to a plan within its duration in order to respond, for example, to a change in professional expectations.

When a learner completes a Catalogue Item this information can be linked back to the plan. If the learner undertakes learning or professional development outside the JanisonCLS, they can get credit for that too using the Log external learning feature.

The comments journal serves three functions:

1. a way for learners to record different kinds of comments, e.g. questions and answers, as part of their learning process.
2. a place for learners to reflect on the learning they have undertaken and how effective it has been.
3. a place for the learner to upload documents that are valuable artefacts for future job applications, professional development audits etc. These might include a CV, letters of reference, certificates and qualifications.

Note that:

- Learners complete a Learning Plan **Entry** when they enter its completion date. They can do this whenever they choose and regardless of how far they have progressed through any linked Catalogue Item(s).
- At this stage dated Learning **Plans** (as opposed to continuous plans) can be set to a completed status by learners whenever they choose. This can occur regardless of the dates set for the plan's duration and of whether the Entries and/or linked Catalogue Items have all been completed.

Thus, the plan is very much a tool that can be shaped by managers but whose execution is in the hands of learners. It could be used, for example, to more overtly steer learners through CPD or Competency frameworks or through a huge catalogue of potential learning. And managers can update its mandatory items on-the-fly in order to respond to changes in the learner's professional environment.

In terms of the CLS, Learning Plans function in almost all respects like any other Learning Asset in the CLS. They can:

- be added to Catalogue Items.
- be enrolled in.
- be completed.
- be subject to enrolment rules and group enrolments.

Learners can have more than one plan at once, provided the Learning Asset is added to more than one Catalogue Item – you cannot have more than one enrolment in the same Catalogue Item at once.

Note that administrators can only delete a learner's enrolment in a Learning Plan if all of the Comments have been deleted.

Setting up for a Learning Plan

Activating the plug-ins

Your JanisonCLS will not support Learning Plans if you don't have the *Plans* plug-in activated.

If you are using the *Log external learning* feature, you will need to have the *Other Learning* plug-in activated.

If you don't have these activated, you will need to contact the Client Services Team at Janison. It will only take a moment to activate it.

Switch on Discussion Settings Post types

To allow learners to visually classify their journal comments you need to make sure that the Post Types are switched on. Go to **Settings > Discussion Settings** to select and save these.

Discussion Settings

Rating Type ?

None

Post Types ?

☒ General
☒ Question
☒ Support
☒ Challenge
☒ Journal

Doing the background work

Before your users can have a learning plan, you need to do some set up work. Firstly, ask yourself some questions.

Do I want my users to link their learning plans to a particular set of professional standards or similar?

If so, you will need to set up a Tag for each standard and group them into one or more Tag Types. You connect one or more Tag Types to a plan. Learners can link one or more of the Tags in these Tag Types to an individual entry. This also filters the list of possible Catalogue Items that they can link to that entry.

Do I want to manage their learning in any way? Some organisations want learning grouped into learning areas or need to record which competency certain pieces of learning relate to. This is particularly relevant if your learners need to meet CPD requirements. If so, you need to set up CPD points and link them to Tags and Catalogue Items beforehand so that learners can log the points acquired.

Do I want my users to be able to record learning they have done outside the JanisonCLS against their learning plans?

If so, you will need to set up a learning asset of type Other Learning and link it to a Catalogue Item. In addition to the basic steps you will need to do five things:

1. Check the *Allow learner to link to learning plan entry box*

Other Learning: DemoOtherLearning

Name	DemoOtherLearning
Identifier	demoootherlearning

Description

For Learning Plan demo
 Allow inclusion of learning outside CLS

☒ Active

› Verification Settings

▼ General Settings

☐ Requires Points

☐ Allow Provider

☒ Allow learner to link a learning plan entry ?

☒ Allow file upload of evidence

☐ File upload of evidence is mandatory

Submit button options ?

☒ Save & Submit

Note that you can optionally set the Other Learning asset to require points:

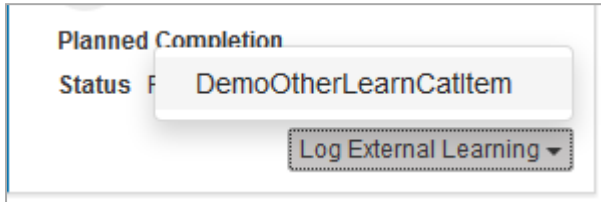
▼ General Settings

☒ Requires Points

If this is set then the learner must enter points against CPD Tags when logging external learning.

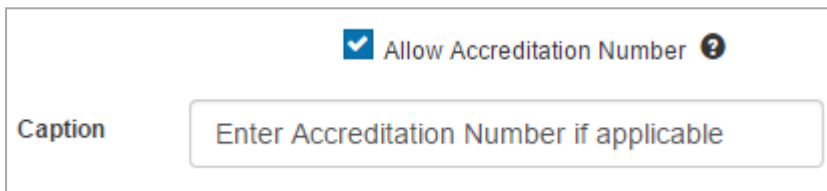
- Put the asset into a Catalogue Item alone, i.e. as the only Learning Asset in that Catalogue Item.
- Give the Catalogue Item a name that will be meaningful to your learners. This is particularly important if you are going to use more than one Catalogue Item so that external learning can be

recorded against different groups. Your learners will see the Catalogue Items in a drop down menu when they are editing their learning plans. The name in the screenshot below would not particularly enlighten learners!



The screenshot shows a form with a label 'Planned Completion' and a text input field containing 'DemoOtherLearnCatItem'. Below this is a button labeled 'Log External Learning' with a downward arrow.

4. If your learners need to record a course accreditation number when they record their learning, check the Allows accreditation number box



The screenshot shows a form with a checkbox labeled 'Allow Accreditation Number' which is checked. Below this is a text input field with the placeholder text 'Enter Accreditation Number if applicable'.

Note that if you are using this, it's probably because some of the learning your learners will do outside the JanisonCLS will be accredited and some won't be. Do not put a Course Accreditation Number on the Catalogue Item as well. If you do and the learner doesn't enter a Course Accreditation Number when they record their learning, it will default to the one you put on the Catalogue Item.

5. Make the Catalogue Item private (i.e. don't publish it in the catalogue), see Make a Catalogue Item private or public.

Create and Edit a Learning Plan

Note that you can't use the "Add Learning" wizard to create Learning Plans because they are too complex to work in the wizard. Instead go to **Manage Learning** > Manage Learning Assets and then add a new Learning Asset.

Select New Plan and fill in the basic information:

1. Enter a **Name**.
2. Enter an **Identifier**.
3. Enter a **Description**.
4. Click **Save Plan**.



New Plan











Name*

Identifier*

Description

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

Font Family ▾ Font Sizes ▾   Formats ▾ **B** *I*

          A ▾ A ▾

Words: 0

4







Save Plan or Cancel

Once you have created the plan, you see its inspection screen. You can go back and alter its basic information by clicking **Edit Plan** from this inspection screen.

In the inspection screen you specify the plan's settings in a number of separate categories. Click the chevron next to the category to view what has been specified; click the pencil to edit it and then click **Save**.

Plan: DemoPlan
[Edit Plan](#)

Name	DemoPlan
Identifier	demoplan
Description	Learning Plan for university lecturers.
Active	Yes

- Introduction Text 
- Plan Settings 
- Completion Rules 
- Start/End Date Rules 
- Plan Entry Tag Types 
- External Learning 
- Default Entries
- Recent activities

Introduction text

If you have a way you'd like learners to use learning plans, specific instructions or other information you'd like to convey to learners when they are creating their plans, include it here. The editor allows for rich text so you can link a video presentation or other media if you want to. Whatever you enter here will be presented to every learner at the top of their main learning plan screen.

Plan Settings

If you want your learners to link Catalogue Items to the entries in their learning plans check this option. They can then link particular Catalogue Item(s) to an entry. They see a link to take them to that learning and will get an acknowledgement within the entry tile when they have completed it:

Catalogue Items

Demo (Completed on 9/07/2015)

Note that they are not forced to actually complete it before completing the entry itself.

▼ Plan Settings

☐ Can Link Catalogue Items

Save

 or Cancel

If you do not select this option then learners enter only descriptions of activities and dates in their plan entries. They can however log external learning if that option has been switched on in the External Learning category (see [External Learning](#)).

Note also that when you can edit this setting when a plan is already underway and remove the option. References to Catalogue Item(s) are then removed from existing plans.

Completion Rules

Here you determine how your learner can complete their entire learning plan and what happens next. Note that plan *entries* can still be completed by the learner regardless of what is set for the completion of the *Plan* itself.

The on-screen instructions explain what each option means.

- The rule below is used to determine when and how a plan can be completed.

No Completion
The plan is continuous

Completion controlled by learner
Learners must self-enrol or be admin enrolled to get a new plan after completion

Completion Rule

No Completion ▼

☐ Enable Rollover ⓘ

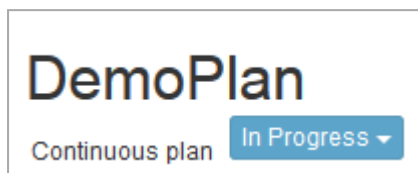
☐ Can Edit After Completion ⓘ

Save

 or Cancel

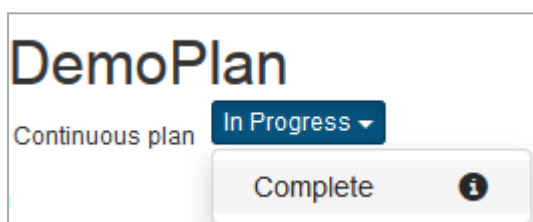
The options are:

- **No Completion** - the plan can never be completed. The learner cannot change the plan's status indicator from In Progress:



If desired, the administrator can of course force-complete the Catalogue Item that the plan is linked to, see the document on Inspect Catalogue Item.

- **Completion controlled by learner** –the learner can complete the plan by changing its status:

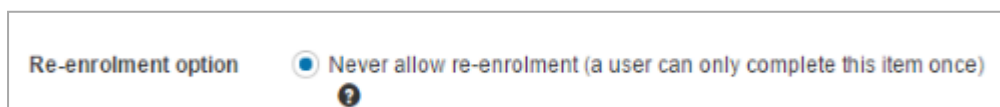


Note that the plan does not need to be 100% complete for this to be possible and the status of the entries is not changed by this action.

Additional options related to plans that can be completed are:

- **Enable Rollover** – this allows the learner to take incomplete learning plan entries from a current plan into a new plan. It also completes the old plan. When a learner rolls a plan over, a new enrolment in the same plan is automatically created. Incomplete learning plan entries are added to it. Comments from the old plan are not added.
- **Can edit after completion** – allows a learner to edit a plan, even if they've completed it.

Note that if learners roll their plan over, they are creating a new enrolment in the same Learning Plan. They can only have one current enrolment in a Learning Plan so once the new one is created and ready to edit, they will no longer be allowed to edit their old plan, even if the edit option is checked. They are however able to view it. Note also that this ability to re-enrol in the same Catalogue Item overrides what was set at the Catalogue Item level, i.e. the following setting:



Start and End Date rules

Some organisations want learning plans to have specific start/end dates. Others prefer to allow learners to choose their own dates or don't want plans to have end dates at all.

1. If you do not check *Allow Start/End Date* then the plan is labelled a *continuous* plan and there will be no start/end dates on the plan. Note that there will however be completion dates for the individual plan entries.

When you check Allow Start/End date a number of options appear in the settings.

2. If you want the learner to control their own dates, check *Allow Start/End Date* and *Allow Learner/Manager to control Dates* but don't set any rules for the Start date or the End date. Once dates are entered by the learner the plan becomes a *dated* plan.
3. If you want a dated plan but don't want the learner to control their own dates, you must select options for the Start and End date Rules.

▼ Start/End Date Rules

The rules below will be used when learners are first enrolled into this plan.

1

☒ Allow Start/End Date

2

☒ Allow Learner/Manager to control dates

Start date rule

3

Not Set

Not Set

Enrolment created date

Day of current calendar year

Day of year from today

End date rule

Not Set

Not Set

Number of days after start date

Save

or Cancel

Start date rule options are:

- The plan starts on the day the learner is enrolled in it.
- The plan starts on a particular day of the current year (even if that day is in the past).
- The plan starts on a particular date when it next occurs. This means that, for example, if today is 15th March 2015 and you select 1 May, the plan will start on 1 May 2015. However, if you choose 1 March, the plan won't start until 1 March 2016.

There is only one choice for the End date rule: the number of days or months after the plan starts should it end.

Note that these rules only apply at the time learners are enrolled in the plan. Once they are enrolled, any changes you make here won't affect their plans.

Note also that these start and end dates do not affect whether the learner can complete a dated plan.

Plan Entry Tag Types

This is where you use the Tags that you created for the professional standards you want your learners to link to their plans, see [Setting up for a Learning Plan](#).

Click and select the Tag Types that you created from the list that will appear in the box below. Click the cross icon to delete a Tag Type that you have selected.

▼ Plan Entry Tag Types

If specified, learners can link one or more tags to a plan entry. The list of tags for selection are filtered by the tag type selections below.

Link Tag Types

✕ university staff

Save

 or [Cancel](#)

The Tags in the Tag Type(s) that you choose will appear to the learners as options when they create or edit learning plan entries.

Learning Plan Entry ✕

Learning Objective ?

Planned Activities ?

Select which tags relate to this objective, you can select more than one.

Tags ?

Planned Completion ?

Completed Date ?

Save or **Cancel**

If Catalogue Items are also linked to plan entries (see [Plan Settings](#)) then learners will have the list of possible Catalogue Items filtered so that they only see those Catalogue Items that are linked to the Tag (s) selected.

Learning Plan Entry [X]

Learning Objective [?]

Planned Activities [?]

Tags [?] × OHS - UniversityStaff

Catalogue Items (filtered by selected tags) [?]
Cells - the basic units of living things

Planned Completion [?] [Calendar icon]

Completed Date [?] [Calendar icon]

Save or **Cancel**

The Tag(s) selected will also appear on their tile for that entry, see [Using a learning plan as a learner](#).

External Learning

This is for learners to record learning that happens outside the CLS. You use the Other Learning assets you set up previously, see [Setting up for a Learning Plan](#). Note that you don't have to have Can Link Catalogue Items set (Plan Settings) for this to function.

When you click in the **Link catalogue item** box, a list of Catalogue Items that contain only one "Other Learning" asset will appear. Choose the ones that you would like the users to use when recording their external learning.

External Learning

Link catalogue item

✕ DemoOtherLearnCatItem

Save

 or [Cancel](#)

If you can't see your Other Learning item here, check the following:

1. Is it actually in a Catalogue Item, not just a Learning Asset?
2. Did you check *Allow learner to link to learning plan entry* in the Other Learning set-up? If you didn't, it won't be visible to you.
3. Is there another Learning Asset in the same Catalogue Item as the Other Learning asset? If so, it won't be visible to you here. The Other Learning asset needs to be the only asset in the Catalogue Item for it to be used this way.

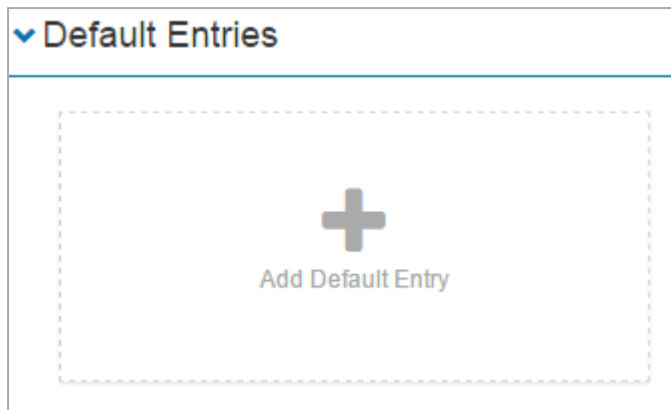
When learners are logging External Learning the Catalogue Items you chose appear as:

Planned Completion
Status F DemoOtherLearnCatItem
Log External Learning ▼

Default learning plan entries

You as a manager can add Learning Plan Entries to a plan before you allow learners to enrol. These can be ones that are mandatory for learners or ones that can be modified by them. Learners will see them in their plan.

Click **Add default entry** to add an entry:



The pop-up that appears will allow you to add an entry. The fields are the same as those that are visible to the learner when they create a new Learning Plan Entry (see [Add/Edit Learning Plan Entries](#)) except for Default behaviour.

A screenshot of a 'Default Entry' pop-up form. The form has a title bar with 'Default Entry' and a close button. It contains several fields: 'Learning Objective' with a red question mark icon and an empty text box; 'Default Behaviour' with a dropdown menu currently showing 'Pre-populated' (this section is highlighted with a red rectangle); 'Planned Activities' with a question mark icon and an empty text box; 'Tags' with a question mark icon and an empty text box; and 'Catalogue Items' with a question mark icon and an empty text box. At the bottom right, there are 'Save' and 'or Cancel' buttons.

Select an option for **Default Behaviour**:

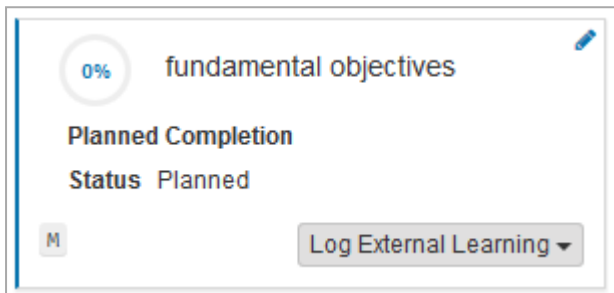
- **Pre-populated** means that the entry will appear in the plan of everyone who enrolls but it won't be made mandatory. This means that the learner will be able to edit every field, except Learning Objective and will be able to delete the entry from their plan.

Learning Plans

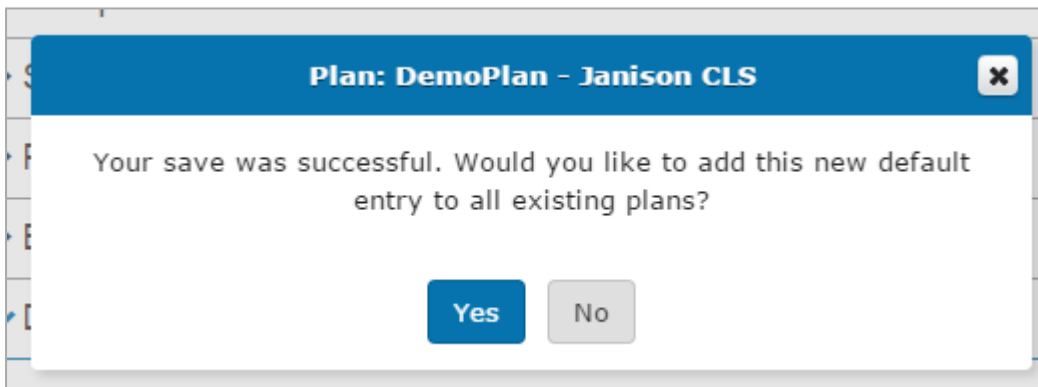
- **Mandatory** means that the entry will appear in the plan of everyone who enrolls and it will be mandatory. This means the learner will only be able to alter the planned and actual completion dates and will not be able to delete the entry from their plan.

Enter data in the rest of the fields as desired and Click Save

Mandatory items will appear with a small M on the entry tile – both to the administrator and to the learner:



When you click **Save** you will see a confirmation screen and you will be offered the option to add this entry to existing enrolments. This means that people who are already enrolled in this plan – but haven't yet completed it – will have this entry added to their plan.



If you choose to add this to existing plans, you will see a spinner appear over the tile that represents the entry and then a message telling you if the operation was successful or not. If not, you will have the option to retry.

If you try a couple of time and it still fails, contact your system administrator.

Note that the M is a string resource that you can alter. To change it, change the search parameters in string resources to search within the Janison.Plans plug in, look for Janison.Plans/UIElements.MandatoryItemLetter and then change the value "M". See document on String Resources for more information.

Learning Plans

ui elements	Janison.Plans/UIElements.LogExternalLearning	Log External Learning	
ui elements	Janison.Plans/UIElements.MandatoryItemLetter	M	

Editing and deleting Default Learning Plan Entries

If you need to edit a default learning plan entry that you have already created, click the pencil on its tile and make changes. When you save your changes, you will be offered the opportunity to push that change out to existing enrolments. However, if learners have already made changes to their version of the entry, your changes will not be applied.

You can also delete default entries from learning plans, and from existing enrolments in learning plans. To delete, click on the pencil icon on the top right of the tile to edit it and then click Delete.

Default Entry

Learning Objective ? fundamental objectives

Default Behaviour Pre-populated

Planned Activities ? testing 123

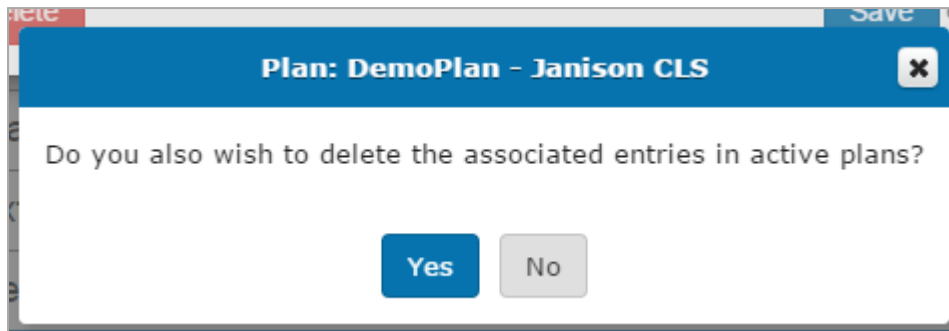
Tags ?

Catalogue Items ?

Delete Save or Cancel

You can delete any entry regardless of whether it is pre-populated or mandatory.

Once you have confirmed the deletion, you will be presented with an option to delete the entry from existing plans.



There are some rules around this

1. You cannot delete completed entries. If the learner has applied a completed date to the entry, it will not delete.
2. If the entry is mandatory, you have absolute control and you can delete the entry, regardless of whether the learner has recorded a planned date, subject to rule 1.
3. If the entry is optional (status = pre-populated) you can delete it (subject to rule 1) unless
 - a. The learner has changed the “Planned activities” text; or
 - b. The learner has added a planned completion date.

Sorting learning plan entries

Learning plan entries are sorted automatically using these three rules

1. Items with a completed date are put to the end of the list; then
2. Items with a planned completed date are put in order by that date ascending; then
3. Items are sorted by Learning Objective in alphabetical order.

If you would like to put entries in a certain order for a learner to follow, give them objective names in alphabetical order. The easiest way to do this is to put a number (1, 2 etc.) as the first part of the objective text.

Setting up the Catalogue Item for the plan

Use Manage Catalogue > **Add Catalogue Item** to create a new a Catalogue Item with its linked Learning Asset being the plan that you have created.

You can make the Catalogue Item public or private.

- If you want your learners to enrol themselves, make it public. It will then appear in the catalogue under *Browse Learning*.
- If you want to control enrolments using *Assign Learning* or any of the automatic enrolment options, make the item private.

You can assign any Catalogue Item settings you like however it's probably worth remembering:

- If you don't want users to have to pay to have a plan, make sure the price is zero and the self-enrolment method is set to *Self-enrol (free)*.
- Setting the self-enrol to *Manager approved* doesn't mean that the manager will be asked to check the content of the learning plan, just asked to approve the learner starting a plan.
- Learning Plans don't count as learning for the purposes of transcripts.

Using a learning plan as a learner

For learners, the Learning Plans offer a versatile and intuitive way to plan and record their learning.

- They can start from a blank learning plan or use a template that has been provided (from a rollover or a default entry).
- They can have more than one learning plan running concurrently.
- They can choose and link courses from the CLS to help meet learning goals or undertake learning outside the CLS and record it against their plan manually.
- Remember, they can enrol in more than one learning plan from the catalogue, they just can't enrol in the same plan a second time until they have completed the first enrolment or rolled it over.

Starting a new plan

Accessing a Learning Plans operates like the access to any other Catalogue Item in the CLS.

When you open a new Learning Plan you see:

1. The name of the plan.
2. An indication of how much has been completed.
3. Plan dates if applicable, otherwise the text continuous plan.
4. The status widget for the plan.

Learning Plans

5. The introduction written by the plan's creator.
6. Space to enter the goals of the plan.
7. Dates, if applicable.
8. A tile for Learning Plan Entry creation.
9. A comments window that opens when the chevron is clicked.
10. Previous plans can be examined by clicking this chevron.

The screen may also have one or more Default Entries depending on how the plan was set up.

The screenshot shows a 'DemoPlan' interface with the following elements and numbered callouts:

- 1**: Plan title 'DemoPlan'
- 2**: Progress indicator '0%'
- 3**: Date range '01/01/2015 - 10/02/2015'
- 4**: Status dropdown 'In Progress'
- 5**: Introduction text 'Welcome to your learning plan for developing your skills as a university lecturer.'
- 6**: 'Overall Goals' section with a 'Click to add a goal' button
- 7**: 'Dates' section with 'Start Date' (01/01/2015) and 'End Date' (10/02/2015) fields
- 8**: 'Add Learning Plan Entry' button with a plus icon
- 9**: 'Comments' section with a chevron icon
- 10**: 'Previous Plans' section with a chevron icon

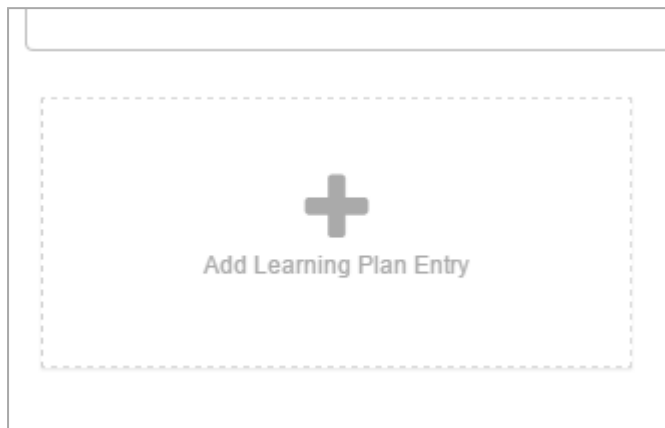
Populating the plan

- **Introduction:** If there is introductory text, it has been provided by your organisation to help you understand how they would like you to use learning plans.
- **Goals:** This is a free text field for you to outline, at a high level, what your goals and direction are for this plan. Click in it to edit it. When you're happy with your changes, click the green tick on the right or just click on another control and the text will save.
- **Dates:** You may not see these if your admin has disabled them. These are the start and end dates of your plan. Depending on what permissions your admin has allowed, you may be stuck with these dates or you may be able to edit them. Try to change them and, if you're not allowed to edit them, you won't be able to save the changes.
- **Learning Plan Entries:** These are the specific learning objectives that you have for this plan.
 - You can add learning plan entries by clicking the plus icon, see below for details.
 - If you would like to **edit** existing entries, use the pencil icon on the top right of the tile.
 - If you would like to **delete** an entry, click the pencil in the top right to edit then select Delete in the bottom left. If Delete is missing, it has been disabled by your administrator.
- **Log External Learning** on the bottom right of an entry tile allows you to record learning you've done outside the JanisonCLS. See below for details. If this option is missing, your administrator has disabled it.
- **Comment:** This is a journal that is specific to this plan. Only you can see what you write in this journal. You can use it for any purpose you like, including:
 - Recording comments, reflections, questions and answers on any learning you've undertaken
 - Uploading documents such as your CV, a referee's report or something else of relevance to you.
- **Status:** This allows you to complete your plan or roll your plan over. If this is missing, your admin has disabled it.

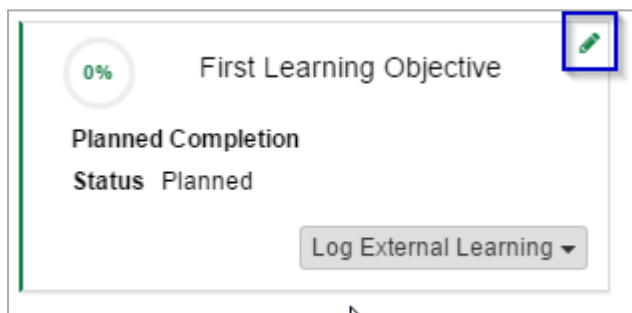
Note that if you complete your plan, you may not be able to edit it again so make sure you really want to complete a plan. If you roll a plan over, you will get a new plan using the same learning plan template. Any learning plan entries that are incomplete will be copied over into your new learning plan.

Add / Edit Learning Plan Entries

Add a learning plan entry by clicking on this tile



Edit a learning plan entry by clicking on the pencil icon on the top / right of an existing entry



This pop-up appears when you add or edit a Learning Plan Entry.

Learning Plan Entry

Learning Objective ? The learning objective is...

Planned Activities ? To study the Cells course and apply the knowledge to OHS issues, specially the use of chemicals.

Tags ? x OHS - UniversityStaff

Catalogue Items (filtered by selected tags) ? x Cells - the basic units of living things

Planned Completion ? 10/07/2015

Completed Date ? 6/08/2015

Save or **Cancel**

Learning Objective: You must fill in this field. It is a description that is meaningful to you about what your objective is. It might be something like “Improve my customer service skills” or “Achieve level 2 professional accreditation”. It can be whatever you like. The important thing is not to have two the same – it will cause you grief later.

Planned Activities: This is a free text field for you to outline, in a way that makes sense to you what you will do to achieve the objective you’ve set. You are not linking specific courses here; that part comes later.

Tags: This control may not be visible (the administrator can choose to disable it) but, if it is, you will need to choose which professional standards (or similar) this objective relates to. Choose one or more from the drop down.

Catalogue Items: This control may not be visible (the administrator can choose to disable it). If it is visible, you can choose any item from the catalogue to link to this entry. When you do this, your completion of the item and any CPD points you gain for it will be recorded in your learning plan. Note that choosing them here does not automatically enrol you in the relevant course.

Planned Completion: When do you think you’ll achieve this objective by?

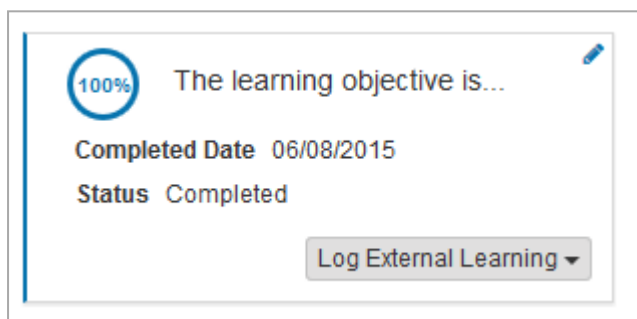
Completed Date: When did you actually achieve the objective? If you put a date into this field, the learning plan entry status will go to Completed.

Once you have completed this form and saved your changes, the details will appear on a Learning Plan Entries tile in the main screen. From there, you can link **External Learning** to this entry.

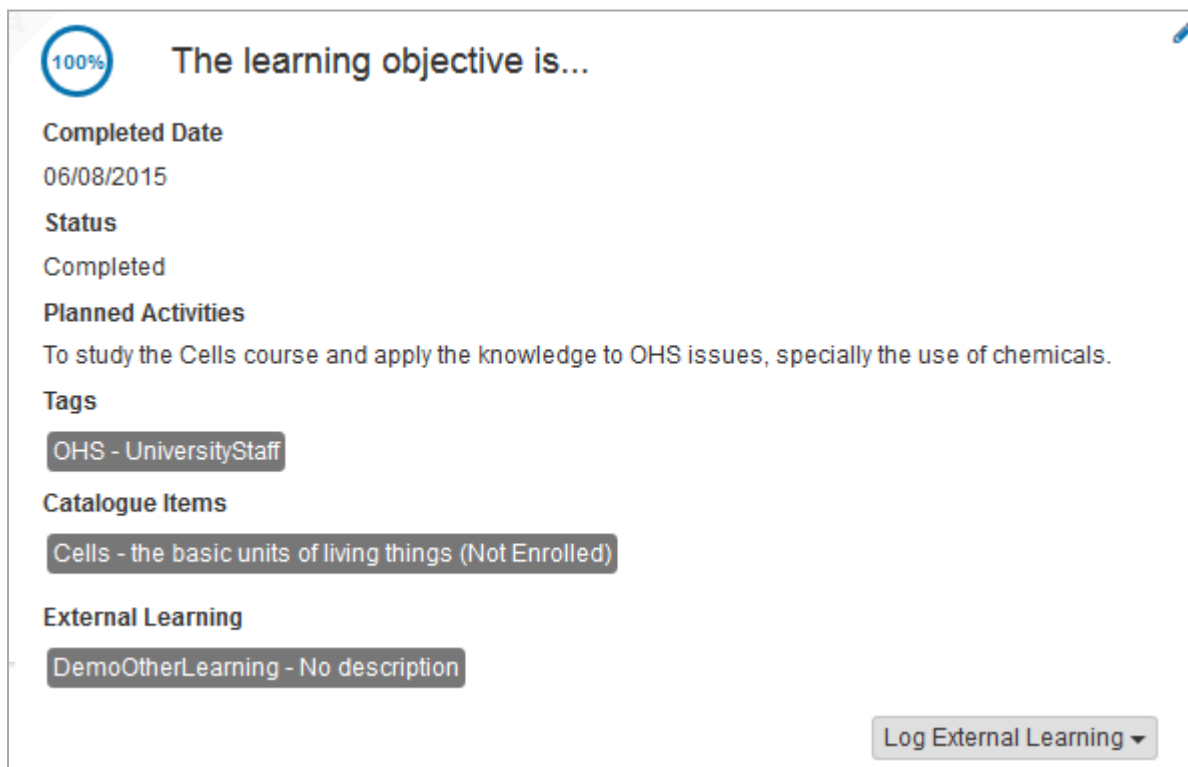
Making changes to your plan

Unless items have been locked as mandatory by your administrator, you can make changes to any part of your plan at any time. You can add, edit or delete learning plan entries, add or remove Catalogue Items, change your goals etc.

Learning plan entries are shown as tiles at the bottom of the screen:



To view the details of one of your learning plan entries, click the relevant tile. It will expand and, possibly, move to show you the details of that entry.



The Tags, linked Catalogue Items and recorded external learning are all clickable:

- Tags will open a new tab and will show you all the catalogue items that are associated with that tag.
- Catalogue items will open a new tab to allow you to enrol in or complete the catalogue item.
- External learning will open a summary screen of that external learning.

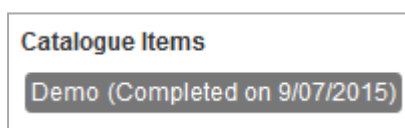
Note that you must click the text on the grey button, not the button itself.

To shrink the tile, click it again.

Recording your learning on your plan

As you complete your planned learning, you want to get credit for it on your plan. You can do a number of things:

- If the learning is in the CLS catalogue and you have linked the Catalogue Item to the plan (see above) then you will automatically get credit in your learning plan:



If there were CPD points attached to the Catalogue Item they are displayed, along with other details, when you click the text on this grey button.

- If the learning is external to the JanisonCLS, you can record it against a learning plan entry using the Log *External Learning* option on the tile.

If there are CPD points entered for the external learning item they are displayed, along with other details, when you click the text on its grey button.

- If this option is missing, it has been disabled by your administrator.
- See below for how to use this feature.
- You can note that an entire learning objective has been completed by editing the relevant learning plan entry and adding a completion date.
- You can make comments on your learning or upload documents to your plan through the Comments feature. See below for how to use this feature.

- Once everything is completed, you can select **Complete** from the Status widget on the main screen and this will close out the plan.

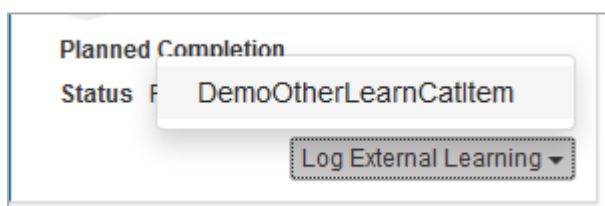
Recording external learning

When you go to a course or undertake other study or relevant professional development (such as attending a conference), you can record that in your learning plan.

Before you can record it, you need to have a learning plan entry to record it against. If you don't have one, create one (see above for how to do this).

To record your external learning:

- Find the relevant learning plan entry tile
- Click the **log external learning** control on the bottom right of the tile.
 - Note – if this feature isn't there, it has been disabled by your administrator.
- If there is more than one option in the drop down, choose the one most appropriate to the learning you have completed.



Once you select an option, the External Learning pop-up will appear.

1. **Plan Entry:** This is the Learning Plan Entry to which you would like to link this external learning record. It defaults to the one you selected but you can change it.
2. The **Instruction** field comes from what has been set up for this Learning Asset.
3. **Learner submission notes:** This is a free text field for you to make some notes about what you learned, what topics you covered etc.
4. Click **Save** to save the file.

The screenshot shows a form titled "DemoOtherLearnCatItem" with a close button (X) in the top right corner. The form contains three main sections: "Plan Entry", "Instruction", and "Learner Submission Notes".

- Plan Entry:** A text input field containing "The learning objective is..." with a dropdown arrow on the right. A callout bubble with the number "1" points to this field.
- Instruction:** A text area containing "For Learning Plan demo" and "Allow inclusion of learning outside CLS". A callout bubble with the number "2" points to this section.
- Learner Submission Notes:** A text area containing "First Aid Certificate, St Johns, 22.3.15". A callout bubble with the number "3" points to this section.

At the bottom right of the form, there is a callout bubble with the number "4" pointing to a "Save" button, with the text "or Cancel" next to it.

Once you save the record, it will appear on the relevant learning plan entry tile. To see it, click the tile to expand it:

The screenshot shows a learning plan entry tile. At the top left, there is a magnifying glass icon and a circular progress indicator showing "0%". The main title of the tile is "The learning objective is...".

Below the title, there is a list of categories with expandable arrows:

- Planned Completion
- Status
- Planned
- Planned Activities
- Tags
- Catalogue Items
- External Learning

Under the "External Learning" category, there is a grey button with the text "DemoOtherLearning - First Aid Certificate St Johns...".

Click the text on the grey button to open the record you have just created. Note that you can add more than one piece of External Learning but you can't delete them.

Note also that the screenshot above was the basic version of the external learning screen. Your administrator can customise the External Learning function and may have added extra fields that you need to

Learning Plans

fill in. The extra pieces of information you enter here will also be shown when you click the external learning 's grey button in the Learning Plan tile.

These extra fields include:

- **Certificate Number:** If you earned a certificate, licence or other accreditation from completing this learning, enter that number here.
- **Course Accreditation Number:** If the course you attended is accredited in some way, enter the course accreditation number here.
- **Upload file:** If you need to include documentary evidence of this learning, upload a file using this button.

Click **Select file** to upload the file.

Click the cross icon to delete the file.

- **Completed Date:** the date you actually did the training, attended the event etc.
- **Valid To / Expiry Date:** the date it expires.
- **Provider** – the provider of this training.

If the administrator has implemented **Points** for the external learning you will see some extra fields in this screen: the categories of points that are involved with CPD Plans.

Enter the number of points you earned from this learning into the relevant category or categories.

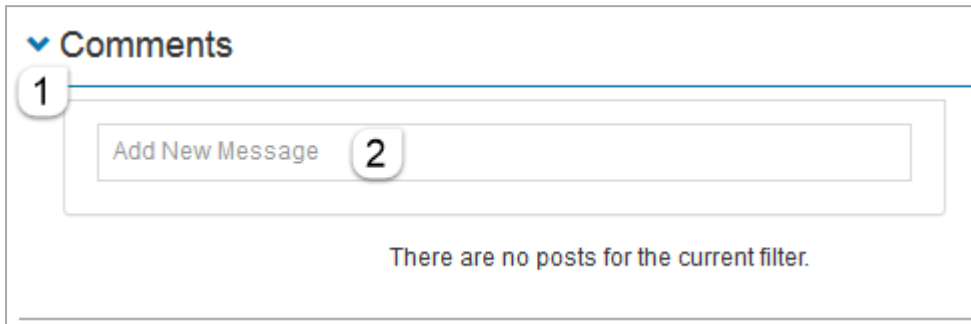
Points by Category*	
Category	Points
CLINICAL	<input type="text"/>
Mandatory Assessment	<input type="text"/>
NON CLINICAL	<input type="text"/>

Using the Comments feature

Comments are a private journal that only you can see. They are made up of a series of messages that can have files attached and extra comments added to them.

To add a new message to your journal:

1. Click the chevron next to **Comments**.
2. Click in the **New Message** box.



▼ Comments

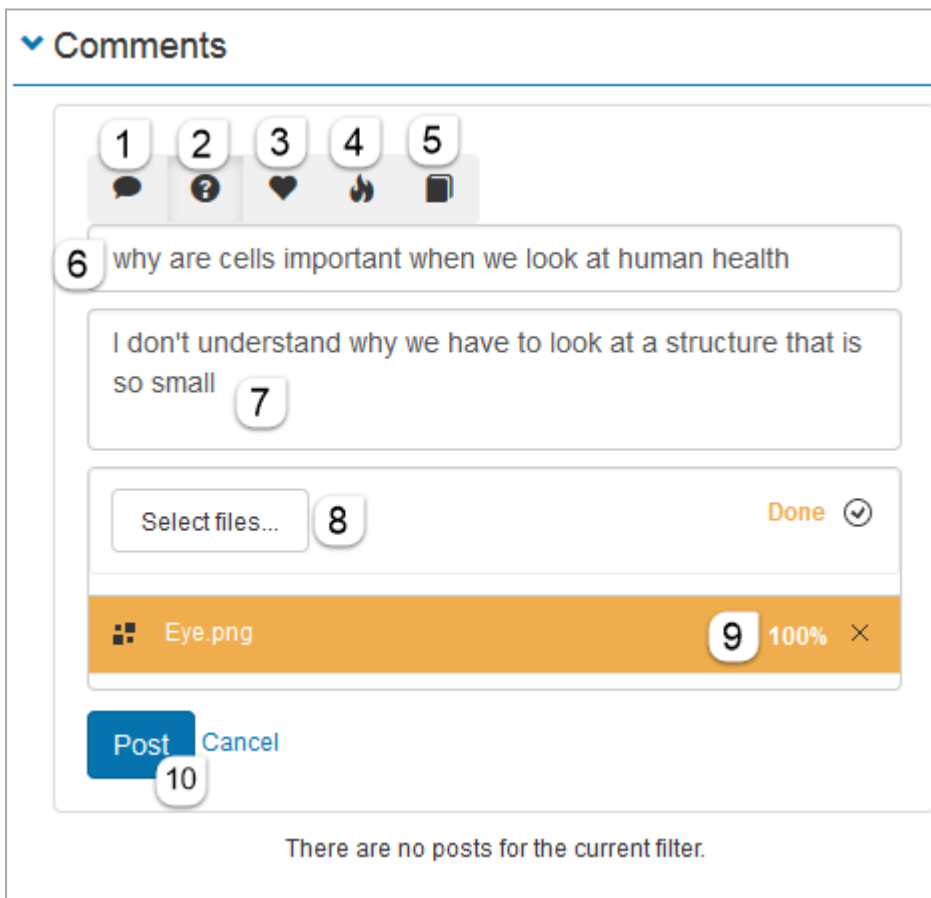
1

Add New Message 2

There are no posts for the current filter.

A message window pops up. Click one of the icons to visually classify the message:

1. General
2. Question
3. Support
4. Challenge
5. Journal



▼ Comments

1 2 3 4 5

6 why are cells important when we look at human health

I don't understand why we have to look at a structure that is so small 7

Select files... 8 Done ✓

Eye.png 9 100% ×

Post Cancel 10

There are no posts for the current filter.

Each message has a subject, a message body and the option to attach files.

6. Enter the message subject.
7. Enter the message body.
8. Click **Select files** to attach a file. You can do this more than once.
9. Click the cross icon to disconnect the attached file.
10. Click **Post** to add the message or cancel it.

Once the message is added to your journal you can see:

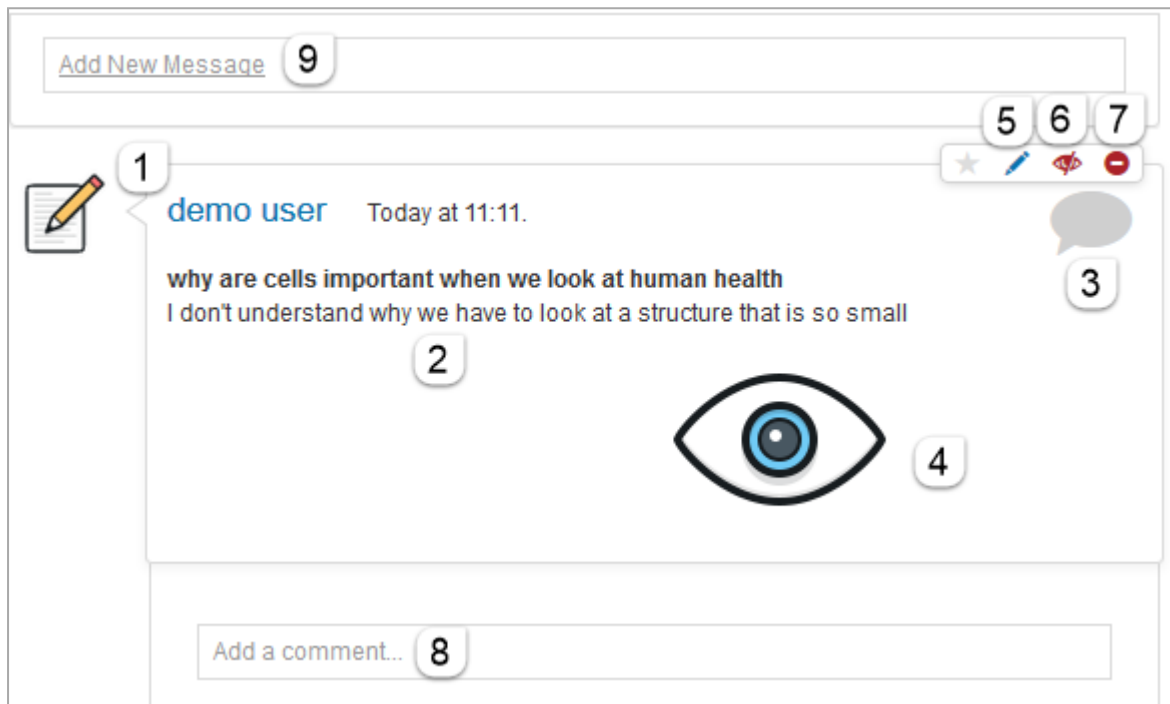
1. Your user name and picture.
2. The message subject and body.
3. The visual icon you chose for the message.
4. File(s) you attached to the message. When you move your mouse over the file, icons pop up to allow you to download it (left) or view it in full screen (right).



Note that if you had added more than one file you will see a slideshow where the icons at left and right allow you to move through the file, with the row of dots indicating where you are in the sequence.

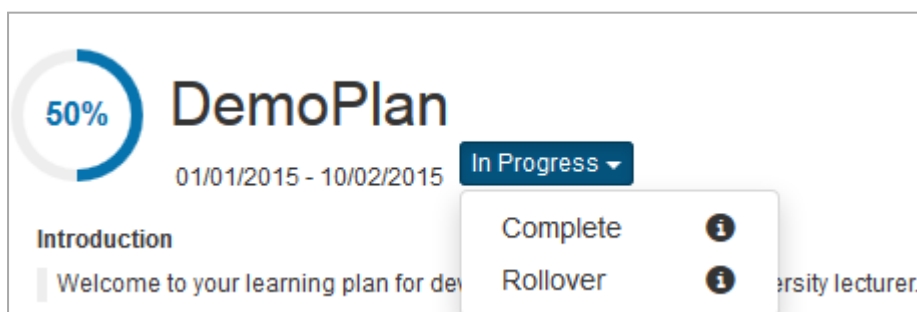


5. You can edit the message by clicking the pencil.
6. You can hide the message by clicking the red eye.
7. You can delete the message by clicking the minus icon.
8. You can add further comments to this message by clicking in the **Add a comment** box. After its creation the comment will have the same edit, hide and delete icons as the message itself.
9. You can enter another message by clicking **Add new message** as before.



Completing your plan

When you judge that you have completed your Learning Plan, you do so using its Status widget if the administrator has enabled learner completions. Select **Complete** to complete the plan.



If the administrator has enabled it, you can also select **Rollover** to roll an incomplete plan over.

If the administrator has disabled learner completions, the widget will be greyed out altogether:

DemoPlan

Continuous plan

In Progress ▼