User Manual - PDP

- What is a Personal Development Plan (PDP)?
- Working with the PDP: Employee/Manager
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What is a Personal Development Plan (PDP)?

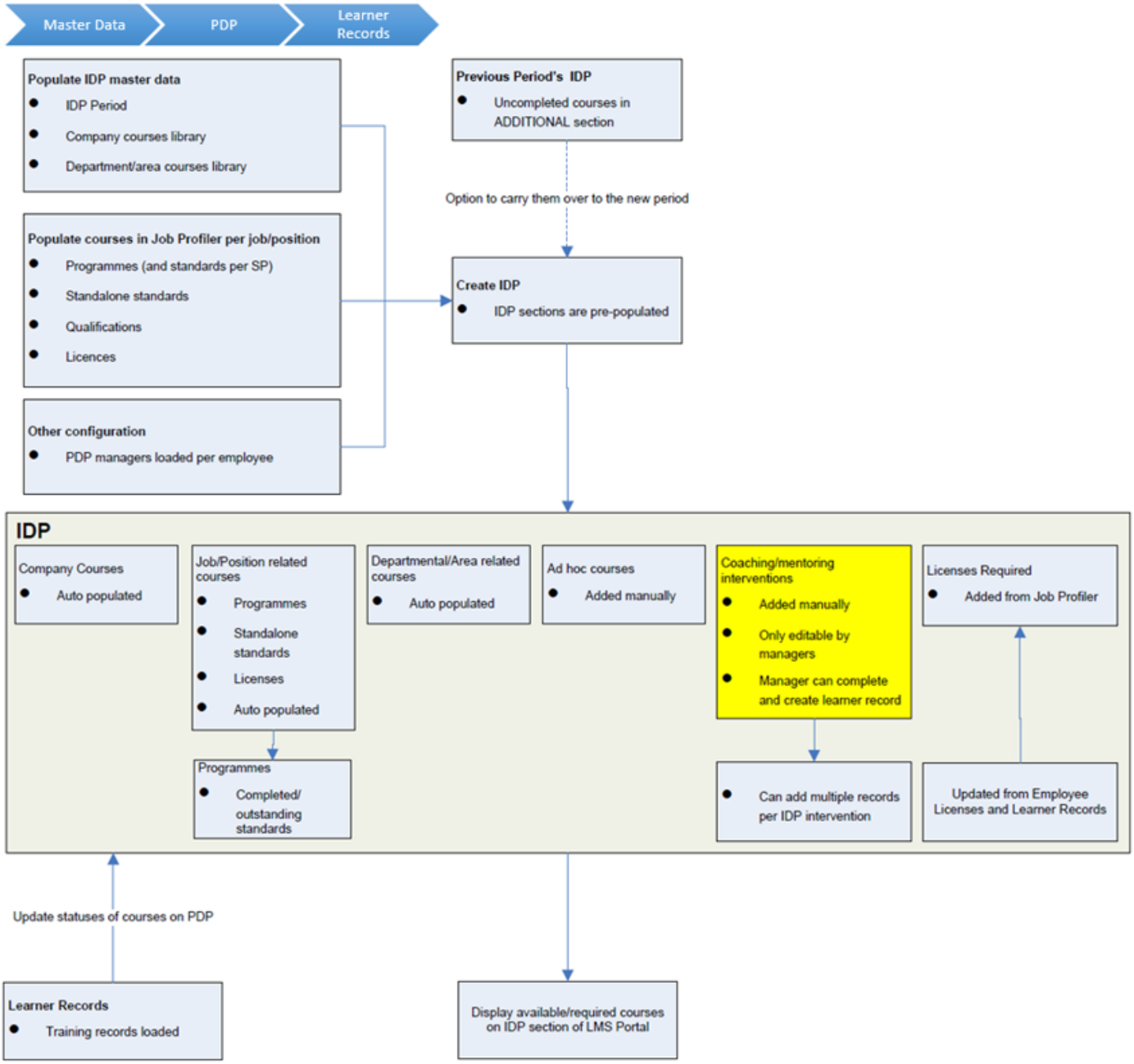
Personal Development Planning is the process of creating an action plan based on goal-setting and planning for personal development within the context of a career, education or for self-improvement.

The PDP, also called an IDP (Individual Development Plan) or a PEP (Personal Enterprise Plan), usually includes a statement of one's aspirations, strengths or competencies, education and training, and stages or steps to indicate how the plan is to be realized. Personal development plans may also include a statement of one's career and lifestyle priorities, career positioning, analysis of opportunities and risks, and alternative plans.

The use of the PDP module in the Signify System is aimed at creating and maintaining an employee's PDP.

Process/data flow diagram

The following process/data flow diagram highlights all system components supporting the PDP and its usage.



Process of creating a personal development plan

Before looking into the steps required for registering PDP initiatives, it must be understood that registering a PDP initiative is but one step in the bigger process of creating a Personal Development Plan. The full process can be described as:

1. Create a Personal Development Plan (listing amongst other things career aspirations).
2. Add initiatives/courses to the PDP.
    - Some initiatives/courses will be added on behalf of the company.

    - Some initiatives will be added by the employee and his manager.
3. Approve the PDP.
4. Maintain and update the courses’ progress.

We will follow these steps to create a new PDP for an employee. We will demonstrate both the employee and the manager’s perspective on the process. Creating a PDP, forms the backdrop for the discussion as to how to link PDP initiatives from the **Performance Management** module.

Process of creating a personal development plan

Working with the PDP: Employee/Manager

In the previous article we have learned what is a PDP, as well as the steps to follow in the PDP process.

In this article we will learn how to work with a PDP.

The employee's PDP plays a central part in the LMS, bringing programmes, standards, licences and other training like company training together on one screen from where an employee can get sight of and action his outstanding training.

This module will be discussed from the employee/manager's perspective.

How did I get here?

- *From the portal, click - My PDP*

What can I expect in this section?

- How to open the PDP.
- How to view a list of your own PDP's.
- How to view a PDP summary.
- Open on of your PDP's.

What configuration and Master library Data should be in place?

- All the master data components listed in the PDP Configuration and Administration section in this manual.

Accessing the PDP Module as an Employee / Manager

There are different entry points into the PDP module but we will first focus on how an employee or manager will use the module.

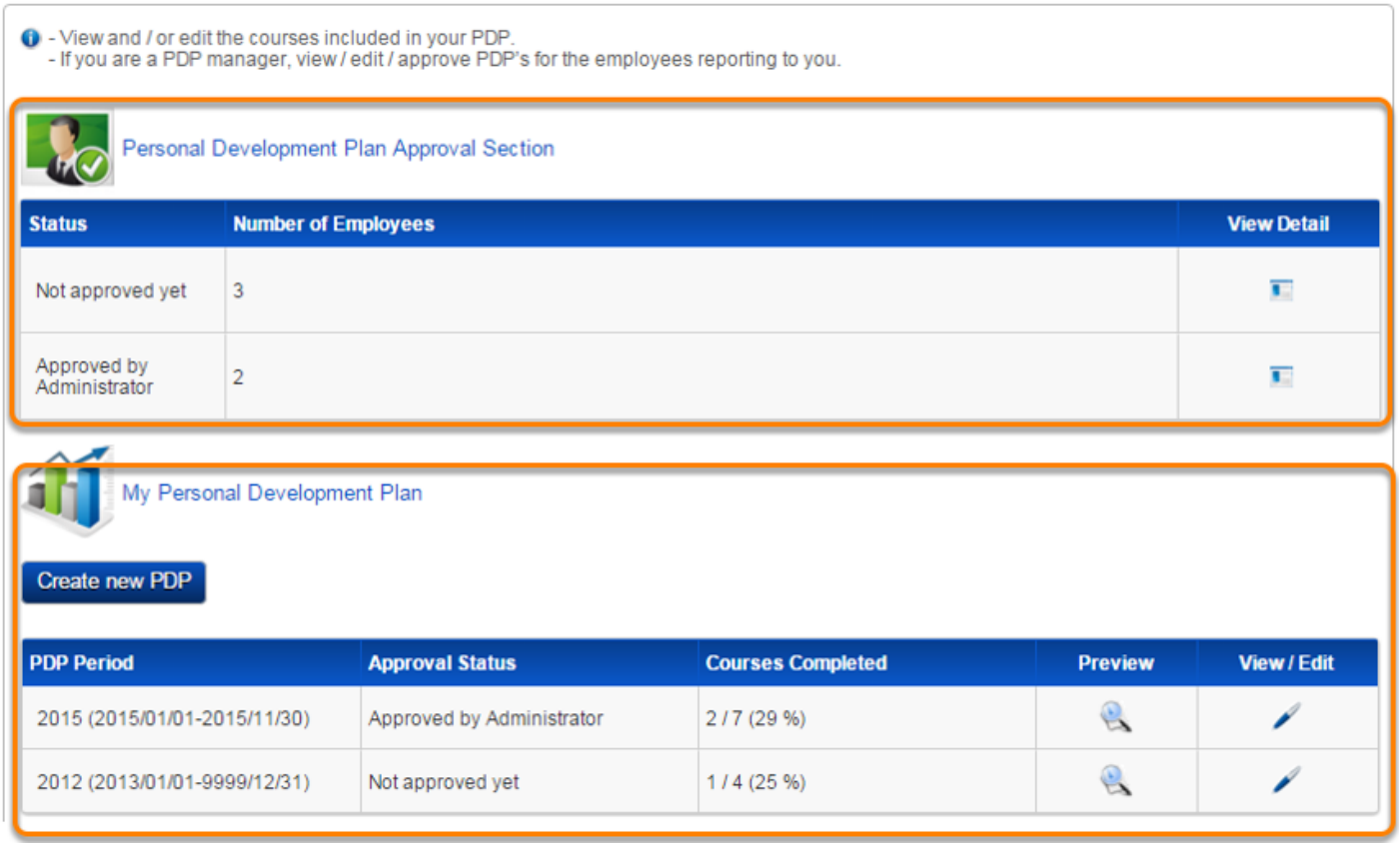
Login to the Signify HR system. From the Home page navigate to the **My PDP** link in the My Quick Start Menu to open the PDP module.

Accessing the PDP Module as an Employee / Manager

View/Edit the Courses in the PDP

The PDP Dashboard are divided into two sections:

- Personal *Development Plan Approval Section:* This section is for viewing a summary of employees' PDP statuses under a manager's control and working on them if applicable. **This section is only available to managers that have been set up as PDP approvers** in their employee's reporting lines.
- *My Personal Development Plan:* this section is for creating a new PDP or manage your own PDP.



Personal Development Plan Approval Section (PDP Managers)

At the top of the **My PDP** screen is a section summarising the statuses of all PDPs under a manager’s control.

Click on any status '**Not approved yet**' OR '**Approved by administrator**' to view the list of employees who's PDP's are in that status.

To open a specific employee's PDP either click on the record or click **Open PDP** in the Action column.

Personal Development Plan Approval Section (PDP Managers)

How a Manager Approves one of his Employee's PDPs

- At this point in the PDP process, the employee’s PDP manager will log in and navigate to the employee’s PDP as show above.
- After opening the employee's PDP locate and click **Approve PDP** to approve the PDP and all its courses.
- From now on no new interventions can be added to the PDP unless it is firstly unapproved.

How a Manager Approves one of his Employee's PDPs

My Personal Development Plan

Locate the **My Personal Development Plan** section on the My PDP screen.

This screen presents the user with a few options as well as important information regarding the progress and status of his PDP.

- A new PDP can be created by using the **Create new PDP** button.
- Existing PDPs can be opened for editing by clicking a PDP’s **View / Edit** icon.
- A summary of an existing PDP can be generated by using the **Preview** icon.
- Every PDP’s **Approval Status** is visible.
- The number of courses completed per PDP can be checked.

My Personal Development Plan

Open One of My Existing PDP's

On the list of your own PDP's select and open one by clicking on the **View / Edit** icon to open the **Personal Development Plan** screen.

- This screen will not be discussed now but rather when we create and build a new PDP.
- Locate and click on **Back to Self Service** to at the bottom of the page to return to the **My PDP** page.

An employee's personal development plan (PDP), containing interventions loaded either here or originating from other modules (e.g. Performance Management, Talent Management, Job Profiler etc.). Courses attended by an employee are not completed on this page but should be loaded in the employeeâ€™s Learner Records which will then reflect here. The PDP can be approved in its entirety by an employeeâ€™s PDP/Talent manager. The sections displayed on this screen depend on a companyâ€™s preferences.

[Ref:93] 2012

Name	Joe Black
Current Job Title	Group CEO
Job Title when PDP created	Group CEO
PDP Period	2012 (2013/01/01 - 9999/12/31)
Academy status level	
Status	Approved by Administrator

Detail | Courses | Documents

Back

Legend

Completed courses and found competent – on an indicated course or an equivalent thereof

To be completed and not yet competent

Courses required by my company required by company

Action	PDPCourse / Standard Name	PDPCourse Expiry Date	Include in PDP	PDPCourse Status
	JOHN DORYS Mod 1 Customer Service	2016/02/19		Approval Status: Completed Status: No PDP Category: Compulsory Training
View / Edit Status Book	LMS Showcase Certification		✓	Approval Status: Completed Status: No PDP Category: Compulsory Training
	Safety Officers Course 1	2015/06/02		Approval Status: Completed Status: No PDP Category: Compulsory Training

Courses part of my job description

There are no specific courses configured for this section.

Human Competence (competencies required to work and interact with people at all levels) & **Professional, Technical & Business Competence** (competencies specific for achieving the desired results and to understand the business

How to create a new PDP

For the purposes of this article we will assume that a PDP for the current active PDP period does not yet exist.

When an employee's PDP is created, the system checks whether there are mandatory courses that must be automatically loaded into the PDP. These courses have different sources e.g.:

- Mandatory courses required by a company.
- Mandatory courses part of a position's profile.
- Mandatory courses required by a learning provider/training department etc.

The courses behind these sections are setup by the PDP administrators. Not all sections are necessarily available. These sections can be identified by the absence of ADD buttons.

Examples of such sections are *Courses required by my company* and *Courses part of my job description*.

The **Personal Development Plan section** will appear as follows on the new portal.

How to create a new PDP

PDP Courses List

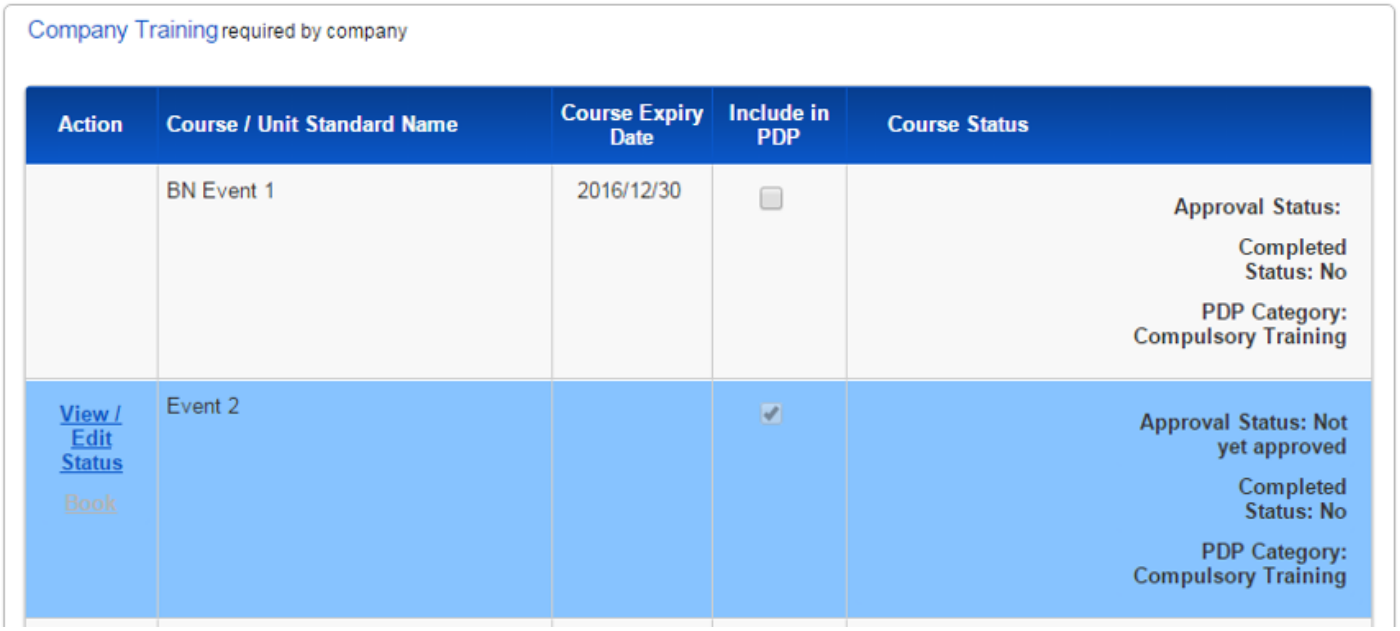
On the **My PDP** page, under the **Personal Development Plan** section, locate and click the hyperlink (You do not have an active PDP. Click here to create one.) to open the following screen. When this screen is opened, a number of actions have already taken place. These are:

- The employee's details (including current job title) are shown at the top of the page. The **Current Job Title** is used to identify courses appropriate to this employee.
- A PDP was created and saved for the currently active PDP period as configured by the PDP Administrator. In this case for 2015.
- The screen is opened on the **Courses** tab.
- The basic PDP properties are automatically set. These can be viewed by clicking the PDP's **Detail** tab, this screen's contents will be discussed later.

PDP Courses List

PDP Company Training List

- Appropriate and mandatory courses (e.g. courses required by a company for all employees) are loaded against the PDP and into their respective sections. An example is shown below.


Company Training required by company

Action	Course / Unit Standard Name	Course Expiry Date	Include in PDP	Course Status
	BN Event 1	2016/12/30	☐	Approval Status: Completed Status: No PDP Category: Compulsory Training
View / Edit Status Book	Event 2		☑	Approval Status: Not yet approved Completed Status: No PDP Category: Compulsory Training

PDP Job Title Courses List

- Mandatory courses required by your job title are loaded against the PDP and into their respective sections. An example is shown below.

Courses linked to my Job Title

Action	Course / Unit Name	Include in PDP	Course Status	
View / Edit Status Book	People skills training	☑	2016/01/04	Approval Status: Not yet approved Completed Status: Yes PDP Category: Compulsory Training

The PDP Process next steps

After creating a new PDP for an employee, typical steps in the PDP process include the following which will be discussed further.

1. Review the mandatory courses automatically added by the system when the PDP was created.
2. Add additional PDP initiatives. These could come from various sources and are discussed later.
3. Discuss the completed PDP with your manager.
4. Your manager will then approve the PDP.
5. Another manager can also approve the PDP but this is an optional step.

Add training initiatives to a PDP

PDP (Personal Development Plan) records or initiatives can originate from a number of sources e.g.:

- Compulsory training interventions/initiatives expected by the company.
- Courses requested by the employee.
- Courses addressing potential performance gaps identified during an employee's performance management process.
- Courses supporting promotion.

In this section we are primarily concerned with adding a training initiative directly to the PDP. In other words adding a course that is not automatically part of the employee's PDP because of job or other company requirements.

The following procedure is used to add training initiatives to the different sections on the PDP screen. We will be using the **Additional Courses** section for our example.

Add training initiatives to a PDP

PDP Training Intervention Detail

- In the section to which a training intervention is to be added, locate and click **Add** to open the following screen.
- Complete the **PDP Training Intervention Detail** screen with suitable information.
- To select the applicable training intervention, click on the orange hand next to the course text box to open the training intervention library.
- Select the appropriate training intervention and click **Save** to update the **PDP Training Intervention Detail** screen.

PDP Training Intervention Detail

PDP Additional Courses

- Close the **PDP Training Intervention Detail** screen and locate the **Additional Course** section to verify that the course has been added.
- To delete the course from the PDP, tick the **Delete** check box and click the **Delete** button.
- The same procedure is followed to add training interventions to all the discretionary sections.

PDP Additional Courses

Employee is Scheduled/Booked on a Course

So far we may have referred to “courses” being added to an employee’s PDP. Actually they were not courses but rather proposed training interventions.

The next step is for the employee to be booked on an actual course, based on an identified training intervention.

Bookings made on courses that are managed and booked externally will not reflect on the employee’s PDP. However, if the employee is booked on a course managed by the Signify Event Management module, the booking will reflect on the PDP. In the screenshot below the employee is scheduled to go on a course on 11 January 2016.

Employee is Scheduled/Booked on a Course

Employee Attends a Training Course

After approval of the employee’s PDP, the employee starts attending the courses indicated on his PDP. For each of these courses the following process should be followed if the course is to be marked as completed on the employee’s PDP.

1. The employee attends and successfully completes the course. A course can be managed externally or internally in the Signify Event Management module.
2. The course results are fed back to the PDP or HR Administrator.
3. The course results are logged in the system’s Learner Records section. Depending on how the course was managed, externally or in Event Management, a learner record is

either created manually or automatically from Event Management.
4. The employee's course in the PDP is updated from the Learner Record to show the employee's completion of the course.

Create a Learner Record for a Completed Course

The only way in which a course on a PDP can reflect as being completed is via the existence of a matching learner record against an employee's name. To log a learner record for an employee, follow these steps (unless the learner record is automatically created from the Event Management or Pathway modules):

- Navigate to the **Manage Employees** module.
- Search for and open the employee's record.
- On the side menu, navigate to **Employee Development | Learner Records**.
- Open the employee's **Learner Records** and enter a learner record for the completed course. Two scenarios are possible for the creation of learner records.
  - If a course is done via the Signify Event Management or E-learning modules, a learner record is automatically created on the successful completion of the course.
  - If a course is done externally and the results obtained e.g. via hard copy, a learner record needs to be manually created for the employee.

An example of a learner record is shown below.

Create a Learner Record for a Completed Course

PDP Course is Updated

Once a learner record for the course is available, the employee's course results are updated on his PDP as well. The completed course is highlighted in green as shown below.

PDP Course is Updated

A few implications of the fact that a learner record's existence updates a course on an employee's PDP are:

- A learner record is matched to a course based on a common Training Intervention name.
- A learner record can only be added for a course if the course already exists in the Training Intervention library. Refer to the chapter on creating a training intervention later in this document.

- If a learner record exists for a course completed in the past and this course is included in an employee’s PDP, the course in the PDP will automatically be updated. Therefore a situation could occur where a course is added and then immediately reflects as being done. If there is doubt about the correctness of this, open the employee’s learner records, search for the applicable learner record and check its details.

Working with the PDP: Administrator

In the previous article we have learned what is a PDP, how to work with the PDP from an employee/managers's perspective.

In this article we will learn how to work with a PDP from an administrator's perspective. A PDP administrator has to support employees completing their PDPs. One functionality available to a PDP administrator is to open the PDPs of such employees. This is done via the **Manage Employees** module

How did I get here?

- *From the portal, click* **- Manage Employees**
- Search for and locate the applicable employee.
- Click to expand the **Employee Development** section from the side menu.
- Click on **PDP** to open the Personal Development Plan for the applicable employee.

What can I expect in this section?

- How to access PDP records as an administrator.
- How to view a list of employee's PDP's.
- How to approve an employee's PDP.

What configuration and Master library Data should be in place?

- All the master data components listed in the PDP Configuration and Administration section in this manual.

Accessing PDP Records as an Administrator

Accessing PDP Records as an Administrator

Employee PDP List

A list of personal development plans for the employee is located at the bottom of the screen.

Select the Personal development plan that you wish to view / edit and click the **Edit** icon to open the Personal development plan screen.

Employee PDP List

How an Administrator Approves an Employee's PDP

The PDP can be approved in its entirety by the Administrator or an employee's PDP/Talent manager. The sections displayed on this screen depend on a company's preferences.

Click on the **Approve PDP** link/button to approve an employee's PDP.

How an Administrator Approves an Employee's PDP

Employee PDP List - Approved by Administrator

Employee PDP List - Approved by Administrator

The list of PDP's will show who approved the employee's PDP as indicated above.

Personal Development Plan Reports

The following standard PDP reports are available:

PDP Detail Needs Analysis Report

A detail list of all PDP training per employee.

The following filter criteria can be entered.

PDP Detail Needs Analysis Report

Report Example

Report Example

How to Create Master Data and Configure the PDP Module

In the previous articles we have learned how an Employee, Manager and Administrator work with the PDP module.

In this article we will learn how to create the PDP master data and how to configure the PDP module.

How did I get here?

- *From the portal, click - System Administration | Personal Development Plan*

What to expect in this section?

- Where to maintain administration and master data and how to configure the PDP module.

Accessing the PDP Administration information and Master Data

To get to the **PDP Administration** and **Master Data** screens:

- Open the Signify HR Portal.
- From the **Administration** menu select **System Administration**.

Accessing the PDP Administration information and Master Data

How to access the Administration and Master Data information

From the main menu select **Modules | Personal Development Plan**.

How to access the Administration and Master Data information

How to Maintain the Administration Information

The following information is available under the Administration menu and will be discussed in the next articles:

- Company Training Intervention List
- In-Dealer Training Requirements
- Additional Courses offered by my learning provider

How to Maintain the Administration Information

Company Training Interventions List

A list of training interventions required by a company. The courses listed here can be set as mandatory on an employee's PDP. Select the training activity you want to edit click **Add** to create a new company training activity.

Company Training Interventions List

How to Add/Edit Company Training Interventions

The following information is available creating/editing the training interventions required by the company. Enter the applicable information and **Save**.

How to Add/Edit Company Training Interventions

How to Add/Editt the In-Dealer Training Requirements

A list of training interventions required by a dealer/branch/division specifically. This section is optional for most companies. Select the training activity you want to edit click **Add** to create a new

training activity.

How to Add/Editt the In-Dealer Training Requirements

How to access and setup the Additional Courses

A list of courses that will be available for selection under the Additional Courses section on a PDP. Courses are selected from the standard Training Intervention library. If a course is selected, only those courses will be available for selection on the PDP. If no course(s) are selected then all courses from the standard Training Intervention library will be available.

Add an additional course by clicking on **Add** and select an intervention from the Intervention Library. An additional course can also be deleted from the list.

How to access and setup the Additional Courses

Master Data

Category

List of the PDP categories.

Category

Period

List of periods for which PDPs can be created. One of these will be the current active period e.g. 2015.

Period

Training Category

List of Training Categories e.g. Training linked to Qualification.

Training Category

Development Priority

List of Development Priorities e.g. Priority 1, High, Medium etc.

Development Priority

Development Reason

List of reasons why certain training is recommended e.g. Career Opportunities.

Development Reason