

PERSONAL DEVELOPMENT PLAN

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.

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User Manual - PDP Discussion Dashboard

What is a Personal Development Plan Discussion Dashboard?

The PDP Discussion Dashboard allows the PDP 1st approver or 2nd approver (PDP Practitioner) to initiate a PDP Discussion for the employees for whom they are the first approver. The dashboard displays the progress of the discussions with your employees. All of the information necessary for a PDP discussion is located in one convenient central location.

There are 6 steps in the PDP Discussion process. Use the tabs to guide you to complete the process in a logical way. You can however navigate between these tabs in any order you wish. The results of the discussion will be saved and generated into a specific report.

What is the purpose of the process?

The PDP Discussion provides the opportunity for an employee and their PDP 1st and 2nd approvers to discuss their training requirements.

1. These requirements aim to help the employee to be successful in their current job and to grow within the role. This means that the discussion facilitates and starts the process of closing existing skills gaps that an employee currently has.
2. The PDP Discussion will also identify performance-related training that has been identified through the Performance Appraisal process. This training is compulsory and must address performance-related issues where a lack of skills is hampering desired performance levels.
3. Lastly, the discussion helps to identify training required for the employee's current role and gives sight to an employee of their career path possibilities.

When will these discussions take place?

1. PDP discussions are held within the financial period of the business. This means that it now has a specific start date and end date that fall in a closed period. This closed period runs concurrently to the financial year of the business.
2. PDP 1st and 2nd approvers will thus within this period have the opportunity to conduct at least one but a maximum of three discussions with their respective employees.

Note: Only PDP 1st and 2nd approvers have access to the PDP Discussions.

Process/data flow diagram

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



Process of completing a PDP discussion

The full process can be described as:

1. Start the Personal Development Plan discussion.
2. Discuss the PDP with the employee while updating and completing the fields necessary.
3. Finalise the discussion and print the specific report.
4. Sign the document by both parties and upload the document to the finalised discussion.

We will follow these steps to create a new PDP discussion for an employee. We will demonstrate the PDP 1st approver perspective on the process.

Working with the PDP Discussion: PDP 1st Approver

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

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

The PDP Discussion dashboard allows the PDP first approver or second approver (PDP Practitioner) to initiate a PDP Discussion for the employees who are included in the process and for whom they are the 1st approver. The PDP will then be exported in a specified format.

This module will be discussed from the PDP 1st Approver's perspective.

How did I get here?

- *From the portal, click - My PDP*
- *Then select the PDP Discussion tab*

What can I expect in this section?

- How to use the PDP Discussion Dashboard.
- Where does all the information come from.
- How to complete and finalise a PDP Discussion.

What configuration and Master library Data should be in place?

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

Accessing the PDP Discussion Dashboard as a Manager

Login to the Signify HR system. From the Home page navigate to the **My PDP** link in the side bar menu to access the PDP module.



After you have accessed the PDP module you are now able to select the **PDP Discussions** tab. This is your PDP Discussion Dashboard.



PDP Discussion Dashboard Overview

In this section we will discuss what is displayed on the PDP Discussion Dashboard page and its functionality.

The manager's PDP Discussion Dashboard consists of three sections:

1. Search options.
2. Progress Dials.
3. Employee information.

Each of these sections will be discussed in more detail below.

The screenshot displays the PDP Discussion Dashboard interface. It is divided into three main sections, each highlighted with a red border and a numbered callout:

- Section 1 (Search):** A search bar with filters for Employee Number, Employee Name / Surname, Subgroup (Employees Reporting directly to Fanie Mahlangu (10063741)), Position (All Positions), Legal Entity (All), and IDP Year (2020). It includes 'Search' and 'Reset' buttons.
- Section 2 (Progress Dials):** A summary bar showing progress for 5 employees of IDP Year: Completed (2 of 5, 40%), Not Completed (3 of 5, 60%), and Excluded (7 employees, 7).
- Section 3 (Employee Information):** A table listing employees with their details and status.

Employee	Position Title	Start Date in Position	Documents	Status
Adri	Specialist HRD Compliance	2018/12/10	0	Not Started
Hannes	Superintendent Technical Training	2018/09/17	1	Completed
Louis	Senior Training Officer SHERQ	2019/08/01	0	Not Started
Mumsy	Senior Training Officer SDF and HRD	2018/09/17	0	Not Started
Vincent	Superintendent HRD Systems and Compliance Reporting	2019/11/01	1	Completed

Search Options

The PDP Discussion Dashboard offers an extended search functionality that will make it easier to locate employees:

- Employee Number
- Name or Surname
- Subgroup
- Position
- Legal Entity/Company
- PDP Year

The screenshot shows a search interface with the following filters:

- Employee Number: [Empty field]
- Employee Name / Surname: [Empty field]
- Subgroup: Employees Reporting directly to Fanie Mahlangu (10063741)
- Position: All Positions
- Department: All
- IDP Year: 2020

Buttons: Search, Reset

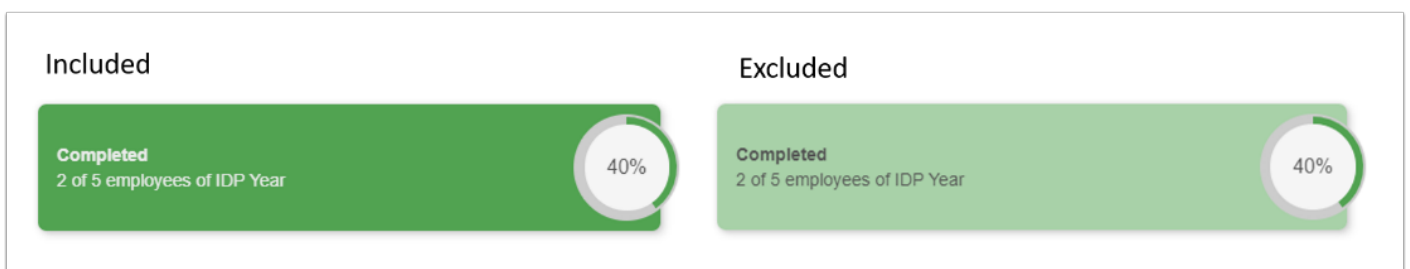
Progress Dials

The progress dials display the progress of the PDP Discussions per category of employees who are included in the PDP Discussion process.

Note: The progress dials indicator percentage exclude the number of employees who are excluded from the PDP Discussion process.

These interactive progress dials can be selected to include or exclude completed, not completed or excluded employee in employee information listed below. By default only the Complete and Not Completed employees are selected.

To include or exclude any of the three categories, simply click on the relevant dial and the employees will be included or excluded in the employee information list. The category that is excluded will be grayed out like the example below.



The progress dials categories and the employees the include are explained below:

Completed:

This is the number of employees that have an approved PDP Discussion.

Not Completed:

Employees listed here have discussions that have not been started and include discussions that are in progress.

Excluded:

These employees have been excluded from the PDP Discussion process. Reasons why an employee is excluded from the PDP Discussions include:

- Employees that are not appointed in an included appointment category.
- Employees that have not concluded their probation period.

Note: Exclusions are controlled with settings. Depending on the company requirements Contingent workers may or may not be included in the PDP Discussion process.

Tip: The probation period is calculated from the start date in position of the employee. The start date in position is displayed in the employee information list. When the employees is in the probation period they will not be eligible for a PDP Discussion.

The probation period can be set to the client requirements in system administration settings.

Tip: The exclusion reason can be seen when hovering over the Excluded status.




Employee Information

The list of employees are displayed and is dependent on the information selected in the search criteria and the progress dials selected or excluded.

The following information is displayed per employee:

1. Employee photo.
2. Employee Name, Surname and Employee number.
3. Position Title.
4. Start Date in Position.
5. Documents.
6. PDP Discussion Status.

Employee	Position Title	Start Date in Position	Documents	Status
 Adri	Specialist HRD Compliance	2018/12/10	10	In Progress

Note: An employees 'Known As' name is displayed in this list when it is entered in the employees details.

Tip: To get quick access to the documents in the PDP Discussion click on documents number icon in the employee information.



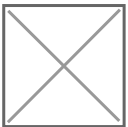
PDP Discussion Status:

a PDP Discussion has the following statuses:

- Not Started.
- In Progress.
- Completed.
- Excluded.

Tip: When a discussion is accessed the status moves from Not Started to In Progress. The status will only change to Completed when the discussion is approved.

Click on the discussion status to open the PDP Discussion for that employee. We will discuss the PDP Discussion in the net section.



PDP Discussion Overview

In this section we will discuss the process of a PDP Discussion, where the information comes from in each section and how to finalise the PDP discussion.

What you see when you open a PDP Discussion for the first time:

1. The name of the employee will be displayed at the top of the screen.
2. The PDP discussion is divided into sections that needs to be completed by the PDP 1st approver.
3. A progress bar is displayed that indicates the progress of the discussion.
4. The 'Back to List' button takes you back to the discussion dashboard.
5. The 'Approve' button indicates the completion and final approval of the entire process. This button will only become active once all the sections have been completed and approved.
6. The 'Print' button will become active once you have approved the discussion.

The PDP Discussion sections can be completed in any order.



Tip: Only sections where confirmation is required will update the progress of the progress bar.

Note: The sections displayed in the PDP Discussion can be switched on or off and are customisable by a system administrator.

Each section in the PDP Discussion will be discussed separately in the sections below.

Personal Detail

The information in this section displays the employee's personal information derived from the "manage employees" database.

The information is not editable the only action required from the PDP 1st approver is to verify and confirm that the information is correct and save.

Tip: If any detail on this screen requires amendment, please send a request to HR to make the necessary changes. For more information on where this data comes from refer to the PDP Discussion Administration manual.

Employee Number	<input type="text"/>	Grade	<input type="text"/>
Name	Adri	Position Title	Specialist HRD Compliance
Surname	<input type="text"/>	Start Date in Current Position	2018/12/10 12:00:00 AM
Race	Coloured	Date of Appointment in Group	2018/12/10 12:00:00 AM
Age	36	Division	<input type="text"/>
ID Number	<input type="text"/>	Section	<input type="text"/>
		Line Manager	Jacob <input type="text"/>

I confirm this section is completed and correct.

Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Development Information

In this section the following information is displayed that is related to the employees job title:

- Essential Skills
- Qualifications Required
- Qualifications Achieved

The action required from the manager is to confirm that the information is correct and to select the Check box 'I confirm this section is completed and correct' and save this section.

Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Essential Skills

These skills are extracted directly from the job profile. This means you cannot add any essential skills to the list. Here you can indicate;

1. Whether a training intervention is required,
2. the type of intervention that is required,
3. the proficiency level at which training should be aimed and,
4. the priority level that the training should have.

Select the applicable option from the drop down menu items.

Tip: The Essential Skills and Description are auto populated from the Job Profile Module of the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.

Essential Skills	Description	Intervention Required	Type of Intervention	Required Proficiency Level of Skill	Priority
Communication skills	Ability to communicate effectively across all levels in written and verbal communication (Intermediate level)	Yes	N/A	N/A	N/A

1 2 3 4

Note: When the Intervention Required is set to 'N/A' or 'No' the fields 'Type of Intervention', 'Required Proficiency Level of Skill' and 'Priority' will be grayed out.



Qualifications Required

The action required from the manager is to confirm that this information is correct.

Tip: The Qualifications Required are auto populated from the Job Profile Module of the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.



Qualifications Achieved

The action required from the manager is to confirm that this information is correct.

Tip: The Qualifications Achieved are auto populated from the employees Learner Records. For more information on where this data comes from refer to the PDP Discussion Administration manual.











Development Identified

The information in this section identifies training linker to the 'Performance Contract Development Plan'. The training requirements listed here were identified during the performance appraisal process. The purpose of this information is to help you to facilitate the discussion to create a bigger picture of the employee's Development Plan.

The action required from the manager is to confirm that the information is correct and to select the Check box 'I confirm this section is completed and correct' and save this section.

Tip: This data can not be edited. The Development Identified Related to Performance is auto populated from the Job Profile Module in the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.

 Personal Detail	 Development Information	 Development Identified	 Career Path	 Development Plan	 Comments	 Signature & Documents
Development Identified related to Performance						
120A Drill Millwright Course						
A+ (Comptia)						
<input type="checkbox"/> I confirm this section is completed and correct.						
						

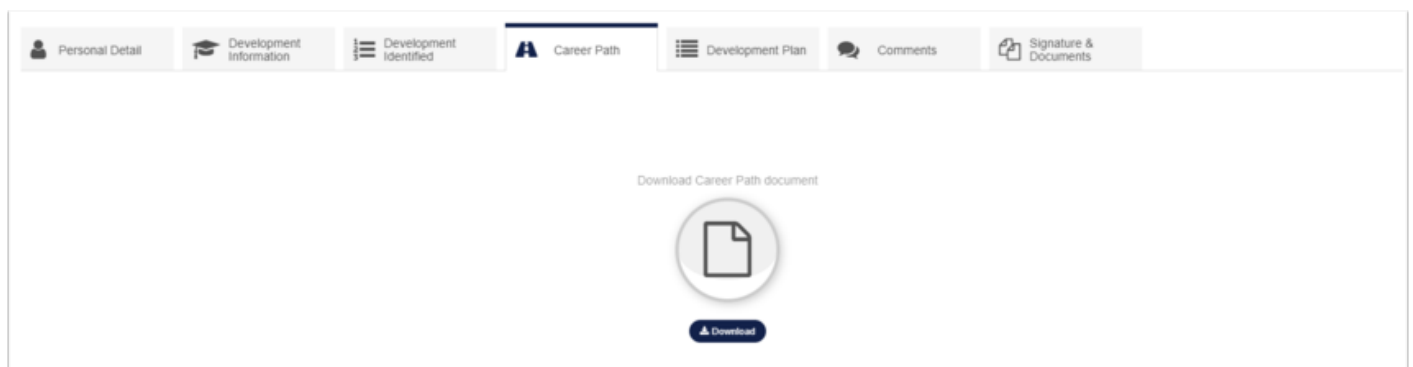
Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Career Path

In this section you will be able to download the career path document pertaining to the specific function and role of the employee. Use the information in this document to facilitate your discussion with the employee.

The action required from the manager is to download the document and discuss its content with the employee.

Tip: This document is only available per specific organisational level and can be configured by a system administrator. For more information on where this data comes from refer to the PDP Discussion Administration manual.



Note: When a new career path document is uploaded by an administrator the old career path document will not be available when accessing historic career path.

Information: This step in the discussion does not contribute to the PDP discussion progress bar.



Development Plan

This section will list all other the training interventions linked to the employees job profile that is not related to performance.

The actions required by the manager are to confirm the training interventions and the set following for each training intervention:

1. Priority.

2. Projected date, this date indicates when the employee is expected to complete the training. The projected date can also fall within the next PDP period if the discussion is done late in the year.

PDP 1st approver is to confirm that the information is correct and to select the Check box 'I confirm this section is completed and correct' and save this section.

Tip: The Essential Plans are auto populated from the Job Profile Module in the system. For more information on where this data comes from refer to the PDP Discussion Administration manual.

Training & Learning Interventions Required	Priority	Projected Date
Lead Auditor Training ISO 9001:2015	Pr 3	2020/05/21

Information: If essential training expires during the PDP period, the training intervention will be listed here. It will be grayed out and indicate an expiry date.

Training & Learning Interventions Required	Priority	Projected Date
Lead Auditor Training ISO 9001:2015	Pr 3	2020/05/21
Red Book	Pr 3	Dec 19 2020 11:59:14

Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Comments

In this section of the PDP Discussion the employee, manager and PDP practitioner has the opportunity to capture their comments.

Actions of the PDP 1st or 2nd approver is to capture the comments and to select the Check box 'I confirm this section is completed and correct' and save this section.

Employee's Comment

(2000/2000)

Manager's Comment

(2000/2000)

PDP Practitioner's Comment

(2000/2000)

I confirm this section is completed and correct.

Save

Note: Comments for the PFP 1st, 2nd approvers and employee are not mandatory. There is however one exception: when a projected date for essential training falls outside of the current PDP period it is mandatory for the PDP 1st approver to motivate why the projected date falls within the next PDP period.

Warning: This section will not be saved if the check box 'I confirm this section is completed and correct' is not selected.

Finalising the PDP Discussion

When you have completed all the sections in the PDP Discussion and the progress indicator indicated 100% you will be able to Approve and complete the PDP Discussion.

IDP Discussion: Adri

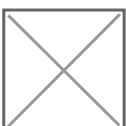
Back to List Approve Print

The 2020 PDP Discussion for Adri is 100% complete.

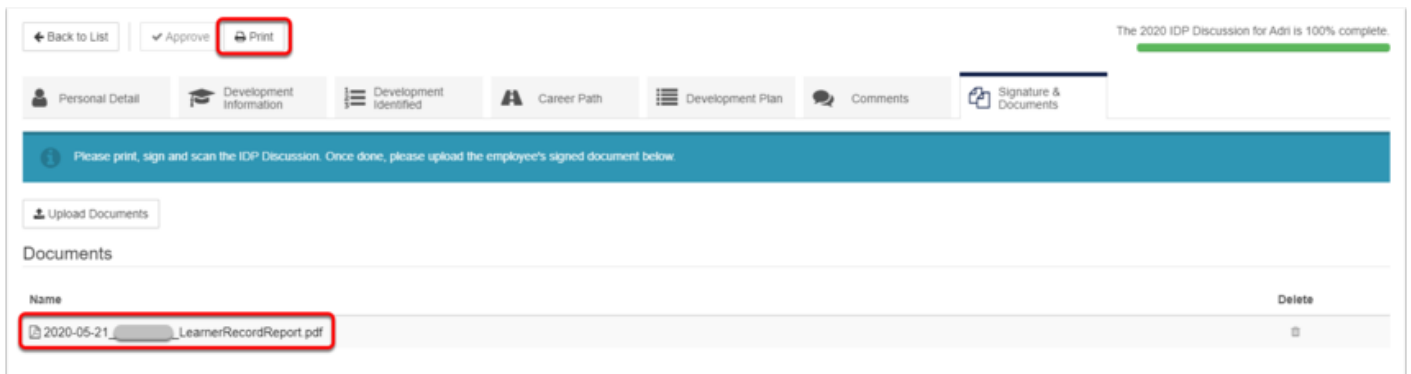
Personal Detail Development Information Development Identified Career Path Development Plan Comments Signature & Documents

Note: Once the PDP Discussion has been approved you will not be able to unapprove the discussion or edit any detail on the discussion.

Information: It is essential that you first review all the information on all the tabs before clicking the 'Approve' button. Remember once you click the 'Approve' button the discussion is locked for editing and no changes can be made.



Once the PDP Discussion is approved you will notice a Learner Record Report is automatically created and is available for download in this tab. The report is a summary of the training that the employee has completed in the past.



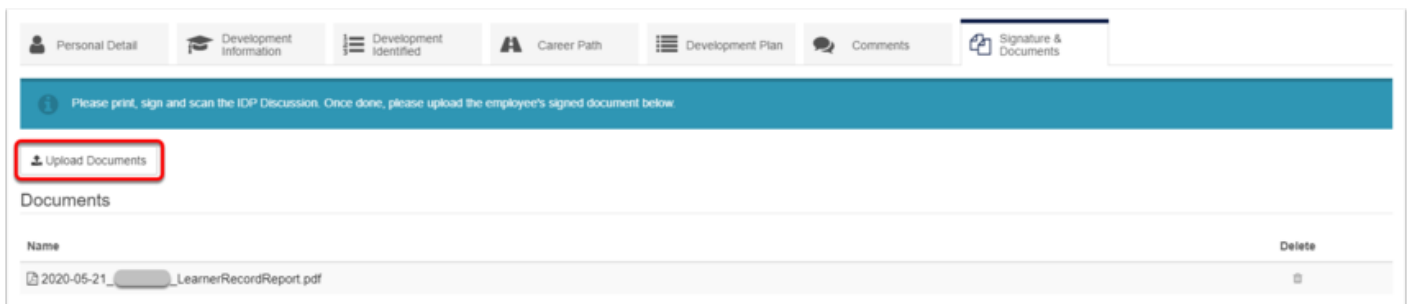
The screenshot shows the 'Signature & Documents' tab of the PDP Discussion interface. At the top right, a green progress bar indicates 'The 2020 IDP Discussion for Adri is 100% complete.' The navigation menu includes 'Personal Detail', 'Development Information', 'Development Identified', 'Career Path', 'Development Plan', 'Comments', and 'Signature & Documents'. A blue banner contains the instruction: 'Please print, sign and scan the IDP Discussion. Once done, please upload the employee's signed document below.' Below this is an 'Upload Documents' button. The 'Documents' section contains a table with one entry:

Name	Delete
2020-05-21_..._LearnerRecordReport.pdf	

The last steps will be to select the Print button to print the PDP Discussion. This document must be signed by the relevant parties and scanned to a computer.



The signed and scanned document must then be uploaded to the employees discussion's last section 'Signature & Documents'. To do this select the Upload Documents button in the last section.



This screenshot is similar to the previous one but highlights the 'Upload Documents' button with a red box. The document list below it is identical, showing the file '2020-05-21_..._LearnerRecordReport.pdf'.

Congratulations you have successfully completed a PDP discussion.

Working with the PDP Discussion: Employee View

What is the purpose of the process?

The PDP discussion provides the opportunity for an employee and their Supervisor and/or PDP Practitioner to discuss their training requirements.

- These requirements aim to help the employee to be successful in their current job and to grow within that role. This means that the discussion facilitates and starts the process of closing existing skills gaps that an employee currently has.
- The PDP Discussion will also cover performance-related training that has been identified through the Performance Appraisal process. This training is compulsory and must address performance-related issues where a lack of skills is hampering desired performance levels.
- Lastly, the discussion helps to identify training required for the employees' current role, and gives sight to an employee of their career path possibilities.

When will these discussions take place?

PDP Discussions are held within the financial period of the business. This means that it now has a specific start date and end date that fall in a closed period.

This closed period runs concurrently with the financial year of the business.

The PDP First approver and PDP Practitioner will thus within this period have the opportunity to conduct at least one but a maximum of three discussions with employees.

Who are the role-players involved in the PDP Discussion process?

There are 3 role-players involved in this process, namely:

- The Employee
- The PDP Practitioner
- The PDP First Approver

How do editing rights work in the system-based process?

It is important to note that the Supervisor and PDP Practitioner are the only people who are able to access and edit the PDP Discussion information, once a PDP has been completed and approved it can no longer be edit.

An employee will only have access to the reports generated once a discussion has been approved and the Signed PDP report uploaded.

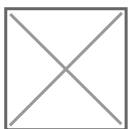
Process of completing a PDP Discussion

The full process can be described as:

1. Have the PDP Plan Discussion with your PDP 1st Approver and/or PDP Practitioner.
2. Sign the document which will be uploaded to the finalized discussion.
3. You will be able to access this on the PDP discussion section on the My Training Requirements Tab.

How to access the PDP Discussion Plan Reports:

1. Login to the system and select PDP from the list of Portal Menu Items.



2. You will have access to the “My Training Requirements” tab.

3. The tab is divided into 2 sections you will have access to your own training requirements displayed on the first section of this tab.



4. On the PDP Discussion section, you will be able to access the following reports:

1. Learner Record report this is a list of completed formal qualifications, Unit Standards, Programmes, and training.
2. IDP Discussion report this is a summary of the PDP Discussion held with either the PDP Practitioner or PDP 1st Approver. You will only have access to the report once your discussion has been completed and your PDP Practitioner or Approver has upload it.

5. If you are excluded from the PDP Discussion Process or if a discussion has not been finalised a system message will be displayed informing you whether you have been excluded from the process or if a discussion is incomplete.



User Manual - PDP

What is a Personal Development Plan (PDP)?

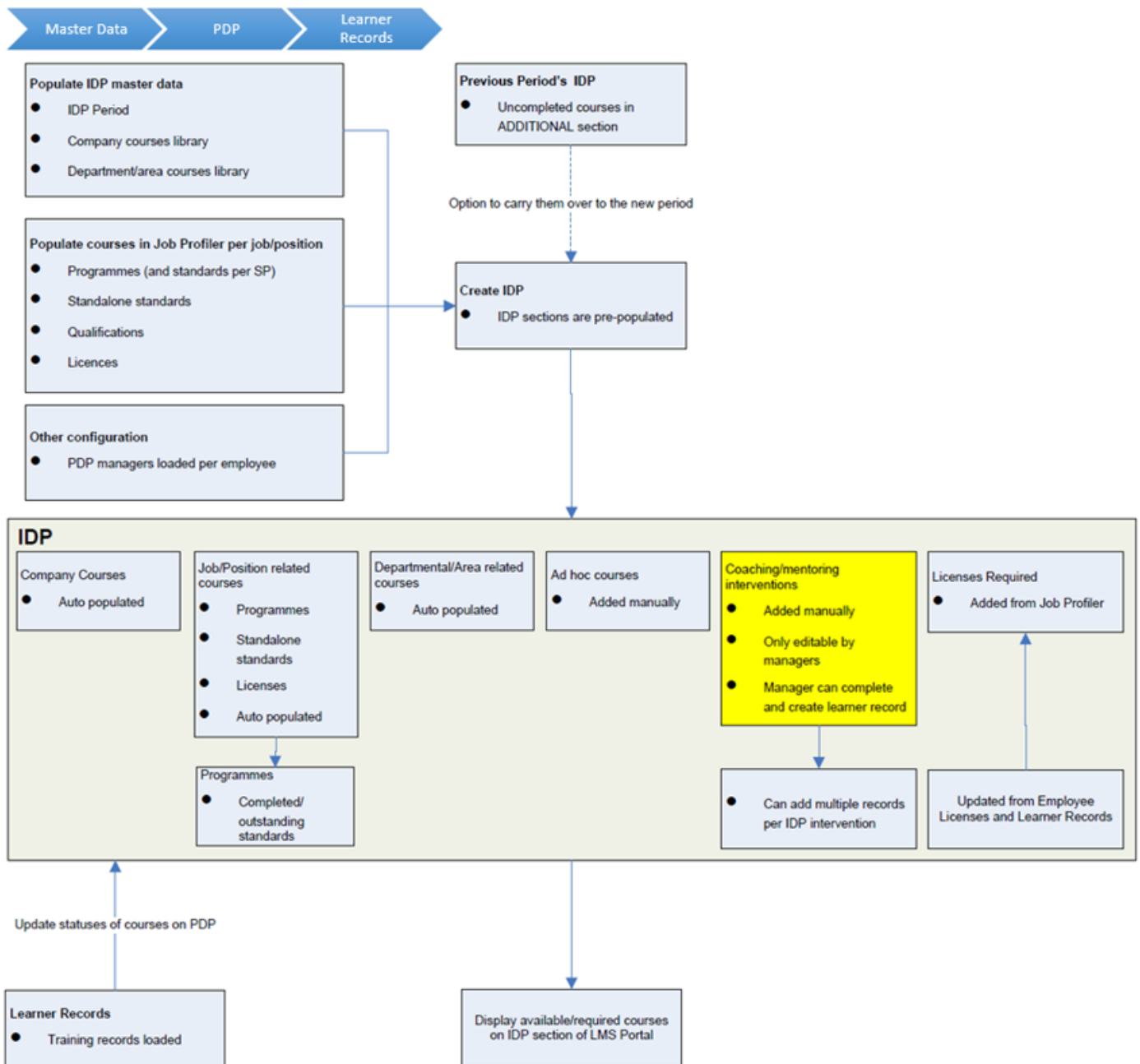
Personal Development Planning is the process of creating an action plan based on goal-setting and planning for personal development within the context of a career, education or for self-improvement.

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.





 - View and / or edit the courses included in your PDP.
- If you are a PDP manager, view / edit / approve PDP's for the employees reporting to you.

 **Personal Development Plan Approval Section**

Status	Number of Employees	View Detail
Not approved yet	3	
Approved by Administrator	2	

 **My Personal Development Plan**

[Create new PDP](#)

PDP Period	Approval Status	Courses Completed	Preview	View / Edit
2015 (2015/01/01-2015/11/30)	Approved by Administrator	2 / 7 (29 %)		
2012 (2013/01/01-9999/12/31)	Not approved yet	1 / 4 (25 %)		

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.



i 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 employee's Learner Records which will then reflect here. The PDP can be approved in its entirety by an employee's PDP/Talent manager. The sections displayed on this screen depend on a company'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	PDP Course / Standard Name	PDP Course Expiry Date	Include in PDP	PDP Course 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		<input checked="" type="checkbox"/>	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	<input type="checkbox"/>	Approval Status: Completed Status: No PDP Category: Compulsory Training
View / Edit Status Book	Event 2		<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	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](#)

Quick Reference Guides and Practical Exercises

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