

# CPD Online

## Getting Started: Learner Mode

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**CUNA**

Credit Union National Association

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## Introduction

TotalLMS is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through TotalLMS, your organization provides you with instant access to online learning courses, schedules and details about traditional learning events, as well as access to performance support and knowledge documents.

### Objectives for This Guide

In this document, you will learn how to use TotalLMS for finding and managing your training. You will also learn about performance management tasks, such as taking a competency assessment and creating a development plan. You will not learn everything about TotalLMS—just enough to get comfortable navigating and exploring some key features and capabilities.

### TotalLMS Overview

Learner mode provides many features. Below is an overview of the feature groups and how you can use them to increase your knowledge and your productivity.

- **Training:** You can access online courses, instructor-led training, seminars, documents and more in one easy-to-use location.
- **Performance Management:** Using CPDOnline, you can map skills, competencies, and development plans against your credit union's business objectives. You can manage your career and growth through alternate job analysis and personal development plans.

## New Student Registration

- Click on the “New Student Registration” link on the home Page.



- The Student Registration Page should open as seen below.
- Enter your First and last name.
- Click on the **Browse...** button to the right of CUID

### Student Registration

To register as a student, please enter First Name, Last Name in the spaces provided, select the CUID and click the Register button.

First name: \*  Last name: \*

CUID (Click browse to select):\*

Credit Union:

If you have forgotten your student ID or password please do not re-register as a new student, this will create a separation of your transcript records.  
[Forgot Your Password? Click Here.](#)

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- All employees will search by City and State of their Credit Union's main branch.

### Organization Lookup

To search for an organization, please key your search criteria below in the spaces provided and click the search button.

City

State/Province

[https://staging.cuna-cpd.org/cunaaffiliates/core/SYS\\_ModalDialog.asp?Path=/cunaaffiliates/Ar](https://staging.cuna-cpd.org/cunaaffiliates/core/SYS_ModalDialog.asp?Path=/cunaaffiliates/Ar) Internet

- Select the bubble to the left of your CU from the list displayed
- Click on the **OK** button

### Select Organization

Select one organization from the list below and click OK.

Search:

< PREVIOUS 1 2 3 4 NEXT >

Records: 34

| Organization Code                       | Name                            | State/Province |
|---|---------------------------------|----------------|
| <input type="radio"/> 032771            | Dane County Credit Union        | WI             |
| <input type="radio"/> 000342            | Filene Research Institute       | WI             |
| <input type="radio"/> 032837            | FPL Credit Union                | WI             |
| <input checked="" type="radio"/> 032763 | Great Wisconsin CU              | WI             |
| <input type="radio"/> 032999            | Heartland CU                    | WI             |
| <input type="radio"/> 033100            | Heritage Credit Union           | WI             |
| <input type="radio"/> 032943            | Kilowatt Credit Union           | WI             |
| <input type="radio"/> 032732            | Madison Credit Union            | WI             |
| <input type="radio"/> 032996            | Madison Fire Dept. Credit Union | WI             |
| <input type="radio"/> 032714            | Madison News Credit Union       | WI             |

[https://staging.cuna-cpd.org/cunaaffiliates/core/SYS\\_ModalDialog.asp?Path=/cunaaffiliates/Ar](https://staging.cuna-cpd.org/cunaaffiliates/core/SYS_ModalDialog.asp?Path=/cunaaffiliates/Ar) Internet

- The User Properties page should open.
- Enter Student Id and password/confirm password
- Fill in remaining required information, Click 'OK' at bottom of screen
- You will automatically be directed to the User home page

After the student Properties have been entered, your student profile will generate and you will be taken to the *welcome* page where you can begin your training.

## Logging on to CPDOnline

The first time you access the Log On page (reference Figure 1, Page 3); you will be prompted to enter the student ID and password that you created at registration.

## Forgot Your Password?

You can change your password after you have successfully logged in to the system. If you forget your password, click on **Forgot Your Password? Click Here** to reset your password and gain immediate access to the system. You will be required to fill out the screen shown below. Once data has been entered, click **Set New Password** to reset your password. At that time your Student ID will also be presented to you, in the case you have forgotten that as well. If you are unable to reset your password, contact us at 800.356.9655, ext. 4072 or via e-mail at [CPDOnline@cuna.coop](mailto:CPDOnline@cuna.coop).

### Forgot Password

To Change your password and to display your User Name, please key your information in the spaces provided below and click the Set New password button.

Last Name:\*       New Password:\*

---

**Security Questions**

Birth Month\*       Birth Day\*       Favorite Color\*       Home Town\*

**Please remember that passwords ARE case sensitive**

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Figure 4: Forgot Password Screen

## Exploring the CPDOnline Interface

After you log in to the system, you will see the Home page.

The screenshot shows the CPDOnline Home page in Learner mode. The page features a blue header with the CPDOnline logo and navigation links: Assess, Plan, Learn, and Contact Us. A user profile bar at the top right displays the user's name, Rachel Immsland, and a search bar. The main content area includes a 'Welcome Rachel Immsland' message, a 'Your Name' section, and a 'Your League' section with 'The League' logo. A 'CPDOnline NEWS' section highlights an event: 'Attend the CUNA Future Forum September 24-27, 2005 in San Francisco'. A search bar is located at the bottom of the page. Annotations with arrows point to various elements: 'mode buttons' (home icon), 'search' and 'help' (top right), 'location path' (Home >), 'shortcuts' (Getting Started menu), 'categories' (My Favorites menu), and 'Your Name' and 'Your League' (user profile and league logo).

Figure 5: Home page in Learner mode

The Home page offers an array of items, including:

**Help:** Help provides step-by-step instructions on how to perform tasks.

**Modes:** Up to four modes may be available depending on the permissions granted to you. Navigate to a different mode by clicking the appropriate button.

**Location path:** A quick glance at the location path will tell you where you are in CPDOnline. You can also use the location path to navigate to other screens quickly.

**Learn menu:** This menu provides you access to most of the learning-related activities.

**Plan menu:** This menu provides you access to Development Plan information.





**Search:** Find the catalog items that you need quickly by using the CPDOnline search feature.

**Categories:** CPDOnline allows items to be displayed in categories. Information is easy to locate and access.

**Search:** Find the catalog items that you need quickly by using the CPDOnline search feature.

## About User Modes




Depending on your role in CPDOnline (manager, employee, and so forth) you may access different pages that appear in different modes. Each mode provides features for specific roles, such as the ability to manage employee information. If you have permission to access features in more than one mode, you can switch between these modes by choosing one of the mode buttons at the top of each page. Below is a table displaying the mode names and related buttons. In this document, we will focus on Learner mode.




| Mode name  | Icon  |
|--|---|
| <b>Learner mode:</b> Provides access to training and learning activities available to you.   |    |
| <b>Manager mode:</b> Provides information about training and performance management for users that managers are allowed to view. Reports are available for individuals and workgroups.                                 |    |
| <b>Report Manager mode:</b> Allows administrators to process existing reports or create their own using this report query tool. All results can be presented in a variety of formats and can be exported to Excel.     |   |
| <b>Administrator mode:</b> Allows users to create, manage, and configure all components that are tracked by CPDOnline. Employees with permissions to publish online training use this mode to make training available. |  |

## Establishing Your Preferences

CPDOnline allows you to arrange how you will see and access information on the site. Once you access the site, you should immediately set your preferences to ensure that you have quick access to the information you need. See Figure 5 on Page 7.

### ► To establish your preferences:

1. Click the  link in the top, right-hand corner of the CPDOnline interface.
2. Click .
3. **Time Zone** defaults to GMT (Greenwich Mean Time).
4. **Language** is defaulted to English (United States).
5. Use the **Options** menu to determine those items that will appear on your Home page.
6. Click  at the bottom of the screen to save your changes.

Note: You can update your password and other information in CPDOnline. To do this, click the  link, then select . Be sure to click the  button at the bottom of the screen to save your changes.

**Profile**

Profile  Preferences

Set your preferences, including your selected language, time zone and shortcut boxes to display on your Home page.

Language:  Time zone:

**Learner Mode Home Page Shortcuts**

Options:

| <input type="checkbox"/>            | Name               | Description   | Number of Links                | Shortcut Box Collapsed   |
|-------------------------------------|--------------------|---|--------------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Getting Started    | Links to common tasks to get you started.   |                                | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | My Favorites       | Items you added as favorites, including categories, documents, activities, collaboration centers, and more. | <input type="text" value="5"/> | <input type="checkbox"/> |
| <input type="checkbox"/>            | Current Training   | Activities you are currently taking.  | <input type="text" value="1"/> | <input type="checkbox"/> |
| <input type="checkbox"/>            | Upcoming Training  | Future activities you are scheduled to take.  | <input type="text" value="1"/> | <input type="checkbox"/> |
| <input type="checkbox"/>            | Pending Activities | Activities for which you are on the waiting list or pending approval.                                       | <input type="text" value="1"/> | <input type="checkbox"/> |
| <input type="checkbox"/>            | Assigned Training  | Required or recommended activities for you, your job, or your organization.                                 | <input type="text" value="1"/> | <input type="checkbox"/> |

Figure 6: Options for setting your preferences

## About the Search Feature

You can enter words in the Search text box available on any page or select from multiple search criteria using the **Advanced** button. When you enter search items, these rules apply:

- Searches are not case sensitive.
- Exact matches for the word or words you enter in the Search box will appear in the search results.
- If you use a space between words in the Search box, the results will include all records that contain both search words.
- You can use an asterisk (\*) as a wildcard character to substitute for zero or more characters.
- Punctuation marks and common short words (or "noise" words) are ignored when used as search criteria. Examples of common short include "and", "or", "the", "as", "after", and "much".

The following table shows some examples of searches including sample results.

| Search using...  | Example of search text | Search results  |
|--|------------------------|---|
| A single word  | Register               | Returns all records that contain the word register. Does not return records that contain variations of this word, such as registering.  |
| Multiple words   | Class List             | Returns all records that contain both "class" and "list" in any order or position. Does not return records that contain only one of these words or variations of the words. An example of a search result could be "The resource <b>list</b> for the Finance Fundamentals <b>class</b> ". |
| A phrase in quotes                                     | "Class Registration"   | Returns all records that contain this exact phrase in the searched content. An example of a search result could be "The Accounting II class registration will be held on January 5".  |
| Single search word with an asterisk wildcard character | class*                 | Returns all records that contain terms that begin with "class" such as <b>classroom</b> or <b>classes</b> .   |
| Multiple search words with wildcard characters         | class* acc*            | Returns all records that contain both the terms that begin with "class" and "acc". Examples of results: " <b>Accident Reporting Classes</b> " and "The available <b>classrooms</b> for <b>Accounting</b> ".   |

## Finding the Right Training

On some occasions you will be automatically registered for training. These classes will appear on your Training Schedule. All you have to do is click the name of an activity to review the details. You can also search for documents, classes, and other learning opportunities to satisfy a specific goal or increase your skill set. In CPDOnline you have two main ways to access training: by looking in the catalog or by using the search feature.

### Using the Catalog to Find Training

On your CPDOnline Home page, you may see categories that contain courses and classes that are available to your credit union from the CPDOnline database. You can also access the items in the catalog by selecting the **Learn** menu and clicking **Catalog**.

**RegTraC**

Search:  [Help](#)

Entire site  This category

---

**Category Listings**

[Add Category to Favorites](#)

|                                     |                          |  |            |                       |        |                 | Records: 1  |
|-------------------------------------|--------------------------|--|------------|-----------------------|--------|-----------------|---|
| <input type="checkbox"/>            | <input type="checkbox"/> | Name ▲                                   | Start Date | Training Organization | Region | Code            | Language  |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Curriculum: <a href="#">R101A Reg CC</a> |            | Global                |        | R101A<br>070706 | <input type="button" value="Register"/><br><input type="button" value="Register Others"/> |

Figure 7: Example of a category in the catalog

## Using Advanced Search

Sometimes you may want to locate items by a certain set of criteria:

- Click **Advanced** next to the Search box.
  - From the search criteria text boxes and lists, enter or select your search criteria.
  - Use the check boxes and selection options, if applicable, to refine your search.
    - CPDOnline searches for exact, whole-word matches including spaces and correct spelling.
    - CPDOnline searches are not case sensitive.
    - You can use an asterisk as a wildcard character that represents zero or more characters. For example, to search for all words beginning with "a", type "a\*".
  - Click **Search**.
  - Scroll through the search results to find the items you require.
 

Notice the options beneath each item. You can register for a class, display more information about an activity, and more.

Keywords:  
  
(Name, Description, Code)

**Advanced Search** ⌵

|   |   |
|---|---|
| Activity type:<br><input type="text" value="None"/> | Delivery method:<br><input type="text" value="None"/> |
| Content type:<br><input type="text" value="None"/>  | Media type:<br><input type="text" value="None"/>      |

---

|   |  |
|---|--|
| Region:<br><input type="text"/><br><input type="button" value="Browse..."/> | Location:<br><input type="text"/><br><small>(Example: 'Lakewood Center' or 'Bellevue')</small> |
|---|--|

Include child regions

---

Has scheduled activities starting within:

1 week from current date  
 1 month from current date  
 Select start and end dates

Start date:    
 End date:

---

Return items not organized into categories

Figure 8: Advanced search page

# Registering for a Learning Activity

After you locate a learning activity that interests you, click **Register** to sign up for the activity.

Select the course and/or exam you wish you register for and click **Finish** to complete your registration. See Figure 9 below for example:

Some online activities do not require registration. The Register button will not appear for these types of activities.



Figure 9: Course/Exam Registration

## Launching Online Learning

When you locate a course or document or online activity that displays the Launch icon, you can access it immediately.

► **To launch online learning:**

7. Locate an activity by using the Search feature or by looking in the catalog.
8. After completing registration, you'll be taken to your Learning Activity Details screen (see Figure 9 below). Next to the name of the activity you want, click **Start**.

### R101-A - Reg CC - Expedited Funds Availability and Collection of Checks




Figure 10: Learning Activity Details **Start**

## Viewing Your Training Schedule

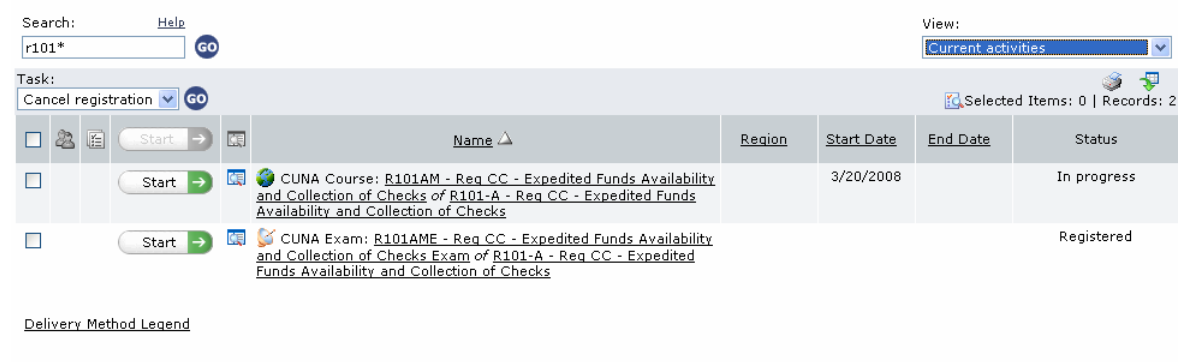
CPDOnline makes it easy for you to access the activities and courses you are registered to take. You can choose to view your upcoming scheduled activities or completed activities. On the Training Schedule page, you can also search for specific courses or cancel a registration.

### ► To view your Training Schedule:

1. From the **Learn** menu, select **Training Schedule**.
2. In the View list, select the type of training you would like to see (such as Current or Completed). A grid displays the names of activities. From this grid you can access information about your progress.
3. If  appears next to the name of the course, you can open it by clicking this button.

### Training Schedule

This is a list of current training activities for which you are registered.





The screenshot shows the Training Schedule page interface. At the top, there is a search bar with the text 'r101\*' and a 'GO' button. To the right, there is a 'View:' dropdown menu set to 'Current activities'. Below the search bar, there is a 'Task:' dropdown menu set to 'Cancel registration' and another 'GO' button. A status indicator shows 'Selected Items: 0 | Records: 2'. The main content is a table with columns: Name, Region, Start Date, End Date, and Status. There are two rows of activities, each with a checkbox and a 'Start' button next to it.

|                          | Name  | Region | Start Date | End Date | Status      |
|--------------------------|---|--------|------------|----------|-------------|
| <input type="checkbox"/> | CUNA Course: R101AM - Reg CC - Expedited Funds Availability and Collection of Checks of R101-A - Reg CC - Expedited Funds Availability and Collection of Checks     |        | 3/20/2008  |          | In progress |
| <input type="checkbox"/> | CUNA Exam: R101AME - Reg CC - Expedited Funds Availability and Collection of Checks Exam of R101-A - Reg CC - Expedited Funds Availability and Collection of Checks |        |            |          | Registered  |

Delivery Method Legend

Figure 11: Training Schedule page


### ► To cancel your registration for a class or activity:


4. From the Training Schedule page, select the check box next to the activity you wish to cancel.
5. In the Task list select **Cancel Registration**.
6. Click .
7. Confirm the selection is the one you intend to cancel and click .

## Viewing Your Progress

Once an activity or class is underway, you can check your progress at any time by visiting the Learning Activity Progress Detail page. This page displays information such as the content type, your total score, elapsed time, status, launch date and completion date. If there are lessons associated with the class, the Lesson grid displays name, total score, status, and first launch date.

### ► To view information about your progress:

1. From the **Learn** menu, click **Training Schedule**.
2. Click the **View progress detail**  button to the left of the activity name. The Learning Activity Progress Detail page appears (see Figure 11).

- If information is available under the Lesson section, click a lesson name to view the status and other details.
- When you are finished, click  to return to the Training Schedule page.

Rachel Immsland

## Learning Activity Progress Detail

R101A Reg CC  
CUNA RegTrac R101A - Reg CC - Expedited Funds Availability and Collection of Checks Course

---

**General**

|   |   |
|---|---|
| Content type:<br>SCORM 1.2                                    | First launch date:<br>Wednesday, August 09, 2006 7:37:23 PM GMT |
| Total score:<br>100 %   | Grade:<br>P   |
| Completion date:<br>Wednesday, August 09, 2006 8:42:44 PM GMT | Elapsed time:<br>2 minutes                                      |

| Name   | Topic Status | Score % | Time in Topic |
|--------|--------------|---------|---------------|
| Course | Passed       | 100%    | 2.21 min      |



Figure 12: Learning Activity Progress Detail

## Viewing Your Transcript


You can access your transcript of completed activity through two paths:

- In Learner mode, click on [View my training transcript](#) in Getting Started box
- In Learner mode, click on Learn > Learning Activity Reports > Training Transcript

Note: Your transcript will include activity code, course name, start and completion dates, percent score, grade, and attended duration. The View filter allows you to show Most Recently Completed courses/exams, All Completed courses/exams, or CUNA Certificates only. To access a printer friendly version of your transcript, click [Printable Transcript](#).

### Training Transcript

An amazing learner



Username: alearner      User number: 00436771  
E-mail:                      NT account:

[Printable Transcript](#)

View:

---

**Activities**











| Activity Code | Activity  | Start Date | Completion Date | Score   | Grade     | Attended Duration                          |
|---------------|---|------------|-----------------|---------|-----------|--|
| A1000PX       |  CUNA Exam: Basic Math Lending and Credit PRE-ASSESSMENT | 4/3/2007   | 4/3/2007        | 16.6667 | COMPLETED | Days: 0, Hours: 0, Minutes: 8, Seconds: 49 |
| A1004A        |  CUNA Course: The Credit Union Difference                | 1/9/2007   | 1/9/2007        | 100     | COMPLETED | Days: 0, Hours: 0, Minutes: 0, Seconds: 23 |
| A1004B        |  CUNA Course: Member Service: The Core of Credit Unions  | 1/9/2007   | 1/9/2007        | 100     | COMPLETED | Days: 0, Hours: 0, Minutes: 0, Seconds: 11 |
| A1004D        |  CUNA Course: A Tradition of Community Involvement       | 1/9/2007   | 1/9/2007        | 100     | COMPLETED | Days: 0, Hours: 0, Minutes: 0, Seconds: 16 |
| A1004PX       |  CUNA Exam: Introduction to Credit Unions PRE-ASSESSMENT | 1/9/2007   | 1/9/2007        | 28      | COMPLETED | Days: 0, Hours: 0, Minutes: 0, Seconds: 25 |
| IS            |  Credit Union Express LA: Information Security           | 11/1/2007  | 11/1/2007       | 94      | P         |  |
| NH - 1        |  Credit Union Express LA: Internal New Hire Training     | 3/14/2008  | 3/14/2008       | 100     | P         |  |
| NHT           |  Credit Union Express LA: New Hire Training              | 11/1/2007  | 11/1/2007       | 85      | P         |  |
| S120EC        |  CUNA Exam: S120EC - Cross-Selling, 4th ed               | 4/24/2007  | 3/21/2008       | 80      | P         | Days: 0, Hours: 0, Minutes: 1, Seconds: 21 |
| S120M         |  CUNA Course: S120M - Cross-Selling, 4th ed              | 4/24/2007  | 4/24/2007       |         | P         |  |

Figure 13: Sample Training Transcript

# Using CPDOnline for Competency Assessments

A competency assessment is a type of online survey created by someone in your company. It may measure how well an individual understands concepts and utilizes acquired skills. Competency assessments can be used to:

- Analyze employee skills and competencies
- Assist with employee reviews
- Survey employee satisfaction
- Conduct 360-degree reviews
- Generate needs assessments
- Assist with planning for the future

Individual users can view performance ratings, see how their performance compares to others in the organization, and use this information to create development goals. Managers can compare individual ratings to the goals of the organization and identify any gaps in necessary skills.


The information below will provide you general direction on competency assessments. For more instructions, go to CPDOnline's online Help and search for [Completing a competency assessment](#).

## ► To access the assessments assigned to you:

1. From the Assess menu, click **Competency Assessments**.
2. Use the View list to select the type of assessments you want to view. Select Pending Assessments to view assessments you need to complete for yourself (where you are rating your own abilities) as well as the ones you need to complete to evaluate other employees.


Note: Assessments you have completed and submitted will not be available to you until the completion period is over. Once the assessment is closed, you will be able to access your completed assessments by selecting Completed Assessments in the View list.

## ► To launch a competency assessment:

3. Select the assessment you want to launch.
4. Click **Launch** next to the assessment.
5. Click .

You can complete an assessment that has been assigned to you by filling out each item in the assessment. The items in an assessment are grouped as competencies, individual skills, and survey questions. You may answer items in a linear fashion or in any order by clicking on the item name. You can also choose to comment about an item or decline any item. Your progress will be noted in the sidebar.

## ► To complete a competency assessment:

6. For each question select the appropriate option button to indicate your response.
7. If desired, enter comments in the **Comment** text area.
8. To clear your selection and comments, click .
9. Click  to move to the next question.
10. Enter general comments, if applicable.

11. When you are done, click **Finish** on the bottom menu.
12. Click **Submit**.

## Using Development Plans to Map Your Growth

Development plans bring together skills, training, experiences, and user-defined items to:

- Establish goals and activities for personal development.
- Establish timeframes and actions for addressing the goals.
- Track and report progress.

### Features of Development Plan



You can create your own individual development plan or use a group plan assigned by your manager using the Development Plans page. Depending on your permissions, some of the features on your Development Plans page may include the items below. Use the CPDOnline online Help to learn more about these features.

- *Create, delete, and update plans.* Development plans are powerful tools if they are relevant and up-to-date. Keep your development plans current by updating them to reflect goals.
- *Change the status of a plan.* You can activate or deactivate a plan.
- *Print a plan.* If you prefer to review details in a hard copy format, you can print a development plan.
- *Export data.* You can review a plan offline by exporting it to Microsoft Excel.

### Creating an individual development plan

You can create your own individual development plan. Also, you can create individual plans for people you manage.

#### To create a new individual development plan:

1. From the **Plan** menu, select **Development Plans**.
2. Verify that the View list below the date states **Individual**.
3. Click .
4. Enter the required information and any optional information you want to provide.
5. Click .

### Adding to a Plan



You can add goals and activities to an existing individual development plan from many sections in CPDOnline. A development plan contains goals and goals contain activities. You can add goals and activities as your need for learning develops. This keeps your development plan relevant and current.

#### *Adding a goal to a development plan*

You can add a goal to a development plan from the Development Plans page.

#### To add a goal to a development plan:






1. From the **Plan** menu, select **Development Plans**.
2. On the Development Plans page, click  next to the appropriate plan.

3. On the Goals page click .
4. Enter the required information.
5. Click .

### ***Adding a new activity***

You can define any kind of activity to meet a goal in a development plan. Training from existing [learning activities](#) may be assigned. Analysis performed by the system can help you locate existing training if you want to move into another job or organization.



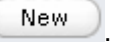


#### **To define an activity for a goal:**

1. From the **Plan** menu, select **Development Plans**.
2. On the Development Plans page, click  next to the relevant plan.
3. On the Goals page, click  for the relevant goal.
4. Click .
5. On the Select Activity Type page, choose **Define your own activity**.
6. Click .
7. Enter the information for the new activity.
8. Click .

### ***Adding an existing learning activity to a goal***

A development plan can show activities which contribute towards a goal. You can add any of the learning activities which you are allowed to view as a manager in the system.

#### **To add a learning activity to a goal:**

1. From the **Plan** menu, select **Development Plans**.
2. On the Development Plans page, click  next to the relevant plan.
3. On the Goals page, click  for the relevant goal.
4. Click .
5. On the Select Activity Type page, choose **Select from all learning activities**.
6. Click .
7. Select the check box next to the learning activity you want to add.
8. Click .

### ***Adding Skills***

If you select a skill and add it to a development plan, CPDOnline will add a new goal with the name of the skill. You can add skills to a development plan from the following sections:



- Assess > Skill analysis

- Assess > Alternate Job Analysis > Job Skills Required

### *Adding to a plan based on skill analysis*

Using a skill analysis report, you can select one or more skills that will become goals in an individual development plan.

#### **To add to a development plan from a skill analysis:**

1. From the **Assess** menu, choose **Skill Analysis**.
2. On the Skill Analysis page, select the skills you want to improve (use the View list to select the desired skills).
3. In the Task list, select **Add to a Development Plan**.
4. Click  .
5. On the Select Development Plan page, select a plan.
6. Click  .

### *Adding to a plan based on job analysis*

Using a job analysis report, you can select one or more skills that will become goals in an individual development plan.

#### **To add to a development plan from a job analysis:**

7. From the **Assess** menu, choose **Alternate Job Analysis > Job Skills Required**.
8. On the Alternate Job Analysis page, select the job with the skills you want to add to your development plan.
9. In the Task list, select some or all skill and then **Add to a Development Plan**.
10. Click **GO**.
11. On the Select Development Plan page, select a plan.
12. Click **OK**.

### *About development plan reports*

Development plan reports make it easy to view the progress of the people you manage. These reports provide more information than the development plan summary page.

The Development Plan Details report includes sections about the owner or participants, plan summary, and goals. This report can be generated for both individual and group development plans.

For group plans, the Development Plan Progress report is available. You can choose to view progress by user or by goal. In both cases, you can filter the results by business objective, if an objective has been associated with a goal.

The information provided above gives you general direction on development plans. For more instructions, go to CPDOnline's Help and search for [Development Plan](#).

## Additional Information

Online help has more information about tasks you can complete in Learner mode. Click the [help](#) link at the top of the page in Learner mode to access these topics.