

## Create an Individual Development Plan for the First Time

### Purpose

The purpose of this job aid is to provide step by step instructions for creating an Individual Development Plan (IDP) in the LMS. The procedure consists of several tasks that are listed below.

Task

#### **Update Talent Profile**

[Note: This is where you update your email, supervisor, and other pertinent information]

Task

#### **Initiate an IDP**

Task

#### **Add a Goal**

Task

#### **Add Activities to Goals**



Task

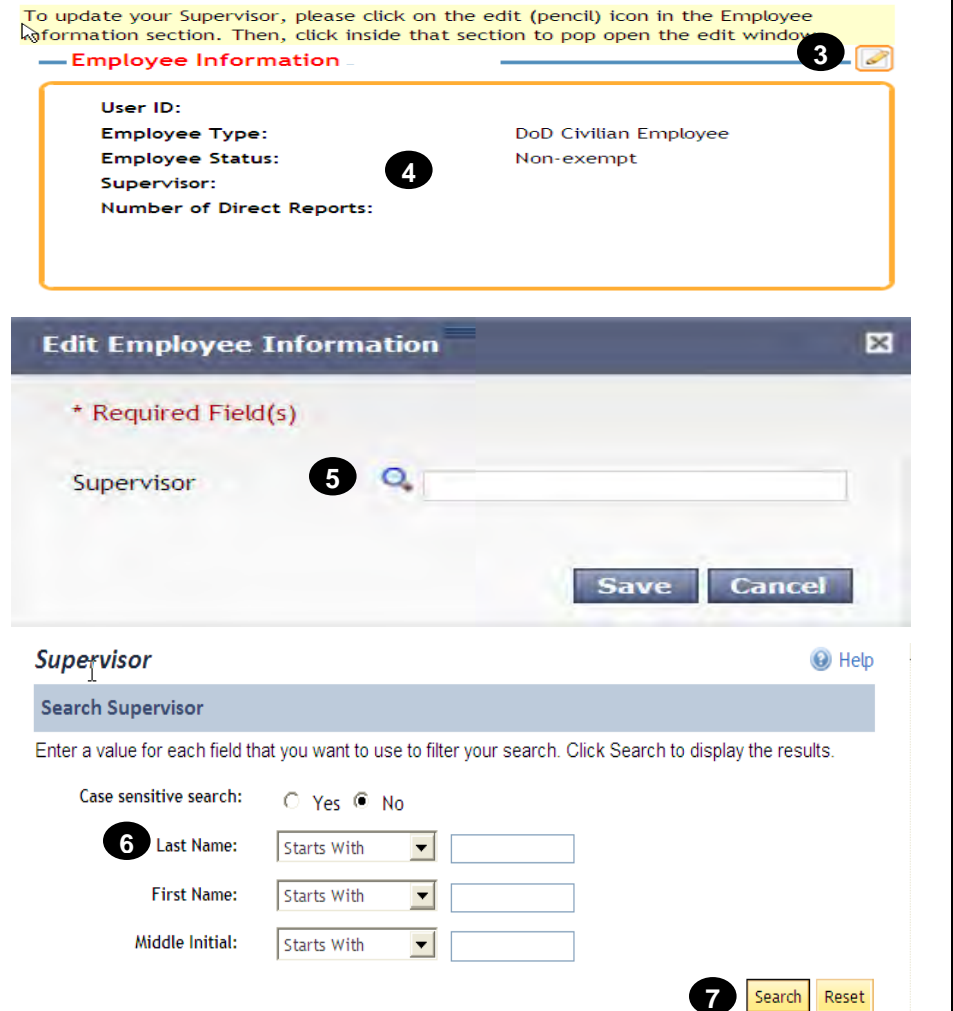
#### **Submit the IDP for Approval**

## Update Talent Profile and Supervisor

- 1 From the **Home** page, click on your name.
- or
- 2 Click the **Your Talent Profile is incomplete** link in the Alerts section of your **Home** page.



- 3 Your **Profile** screen displays. Scroll down to see the Employee Information box.
- 3 Click on the **Edit** icon (  ) An orange outline displays around the section.
- 4 Click within the Employee Information Box to Edit. An Edit dialog box displays.
- 5 Click the magnifier  and a **Search Supervisor** screen will appear.
- 6 Complete the **Last Name** field. If the last name is common, complete the **First Name** field. Note: Pay attention to spelling and keep search criteria as simple as possible.
- 7 Click **Search**.



## Update Talent Profile and Supervisor, Continued

**8** Click **Select** beside the correct name of your Supervisor.

Note: If more than one person with the same name shows up, pay attention to the location and/or middle initial to select your correct supervisor.

**Supervisor** [Help](#)

[← Refine Search](#)

**View Supervisor Results**

User ID	User Name	Job Location	
12372584	SMITH, JOHN L.	512060760 (Richmond, VA)	<b>8</b> <a href="#">Select</a>
12372583	SMITH, JOHN C	426540101 (Philadelphia, PA)	<a href="#">Select</a>
12364689	Smith, John I	421943133 (Defense Logistics Agency-New Cumberland)	<a href="#">Select</a>
12361147	Smith, John D	404780143 (Tulsa, Tulsa, OK)	<a href="#">Select</a>
12390483	Smith, John Everett	425010041 (Mechanicsburg, PA)	<a href="#">Select</a>
12347295	Smith, John M	425010041 (Mechanicsburg, PA)	<a href="#">Select</a>
12355802	Smith, John S	BA3000000 (Manama, Bahrain)	<a href="#">Select</a>
12352200	Smith, Johnna L	063880077 (Tracy, San Joaquin, CA)	<a href="#">Select</a>

Records per Page  (8 total records)

**9** Click **Save**.

**Edit Employee Information**

\* Required Field(s)

Supervisor

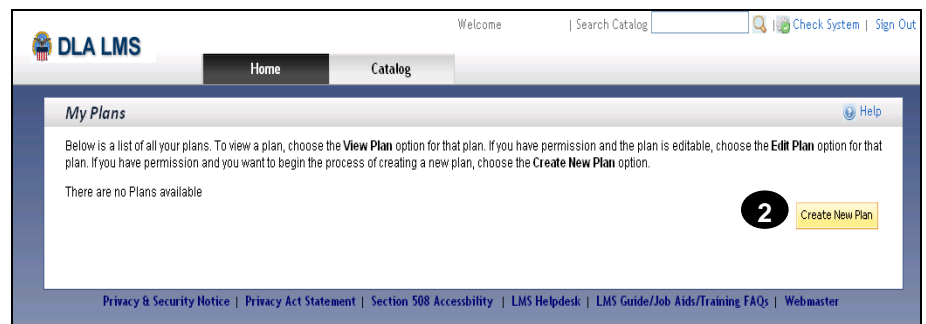
**9**

## Initiate an IDP

**1** From the **Home** page, click on **Plans** located in the Easy Links box.

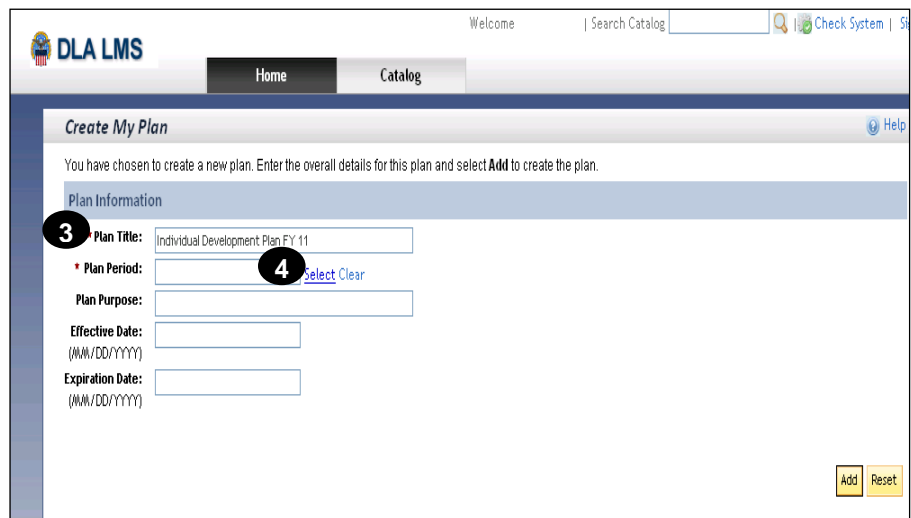


**2** Click **Create New Plan** to create a new IDP.




**3** Type in the **Plan Title**.

**4** Click **Select** beside the Plan Period field.



## Initiate an IDP, Continued

- 5 A **Date Periods** screen will pop up.
- 5 Select the **Date Period ID** and **Description** that applies to your organization. Your selection will populate the **Effective Date** and **Expiration Date** fields.
- 6 Click **Add**  in the bottom right hand corner.

**Date Periods** | Search | Help |

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
> Search Results

Search **Results**

**View Item Results**

Records per Page  (18 total records)

Date Period ID	Description	5
DAPS IDP - CY10	DAPS IDP OPEN SEASON - CY10	<a href="#">Select</a>
DESC IDP - FY10	DESC IDP OPEN SEASON - FY10	<a href="#">Select</a>
DESC IDP - FY11	DESC IDP OPEN SEASON - FY11	<a href="#">Select</a>
DLA L&M - FY11	DLA Land and Maritime - FY 11	<a href="#">Select</a>
DLIS IDP - FY10	DLIS IDP OPEN SEASON - FY10	<a href="#">Select</a>
DLIS IDP - FY11	DLIS IDP Open Season - FY11	<a href="#">Select</a>
DORRA IDP - FY10	DORRA IDP OPEN SEASON - FY10	<a href="#">Select</a>
DORRA IDP FY 11	DORRA IDP OPEN SEASON - FY11	<a href="#">Select</a>
DSCC IDP - FY10	DSCC IDP OPEN SEASON - FY10	<a href="#">Select</a>
DSCP FY11 IDP	DSCP OPEN SEASON - FY11	<a href="#">Select</a>
DSCP IDP - FY10	DSCP IDP OPEN SEASON - FY10	<a href="#">Select</a>

- 7 After you click , a screen like the one on the right will appear.
- \*You have now completed the process of initiating an IDP – the first step in creating an IDP.**

**DLA LMS** Welcome | Search Catalog | Check System | Sign

Home **Catalog**

**My Plans and Goals** Help

The details of this plan are shown below. You may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. You must submit the Plan for Approval. Once your Plan is approved by your Supervisors, you will be allowed to update the status of Goals and Activities. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.

\* = Required Fields

**Plan Title:** Individual Development Plan FY 11 (Select Other Plan) **Plan Period:** DSCP OPEN SEASON - FY11 [Select](#) | [Clear](#)

**Plan Purpose:**

**Plan Status:** Draft **Version:** 0 (current)

**Effective Date:** 2/1/2010 **Expiration Date:** 9/30/2011

[Print Plan](#) [List all Plans](#) [View/Add Notes](#) [Save](#) [Submit for Approval](#)

**Development**

Title:  [Add Description](#)

Group By: Section  [Field Chooser](#) [New Goal](#)

[RETURN TO TABLE OF CONTENTS](#)

## Add a Goal

1 Click the **New Goal** button.

The screenshot shows the 'My Plans and Goals' page in the DLA LMS system. The page title is 'My Plans and Goals'. Below the title, there is a paragraph of instructions. The main form area contains several fields: 'Plan Title' (Individual Development Plan FY 11), 'Plan Period' (DSCP OPEN SEASON - FY11), 'Plan Purpose' (empty), 'Plan Status' (Draft), 'Version' (0 (current)), 'Effective Date' (2/1/2010), and 'Expiration Date' (9/30/2011). There are buttons for 'Print Plan', 'List all Plans', 'View/Add Notes', 'Save', and 'Submit for Approval'. At the bottom, there is a 'Development' section with a 'Title' field and an 'Add Description' button. A circled '1' is placed over the 'New Goal' button at the bottom right.

**\*You must complete all Required Fields (\*).**

\*2 \*Type the **Goal Name** in the field. See Note at the bottom of the illustration.

3 Type your **Goal Description** in this field. (optional)

4 Select whether you want to add this goal to your list of short term or long term goals **Section** of your IDP. (recommended)

**Short Term**—A goal that must be met within the timeframe of the IDP period (typically the goal and activities associated with these goals are priorities one and two—Mission Essential and Enhancement).

**Long Term**—A goal that is needed, but can be met beyond the IDP time period (typically the goal and the activities associated with these goals are priority 3—Optional).

The screenshot shows the 'Add Goal to Plan' page in the DLA LMS system. The page title is 'Add Goal to Plan'. Below the title, there is a paragraph of instructions. The main form area contains several fields: 'Goal Number' (empty), 'Goal Name' (Improve project management skills), 'Goal Description' (Acquire skills to manage a project from inception to completion), 'Goal Category' (empty), 'Section' (List of Long Term Goals), 'Priority' (1 (Mission Essential)), 'Target Date' (08/19/2011), 'Target Value' (1000,001), and 'Stretch Value' (1000,001). There are buttons for 'Finished', 'Save and Add Another', and 'Cancel'. A circled '\*2' is placed over the 'Goal Name' field, a circled '3' is placed over the 'Goal Description' field, and a circled '4' is placed over the 'Section' dropdown menu.


\*2 **Note:** A **Goal** is the purpose of the training, the end result desired. In the example above, the **Goal Name** is “Improve project management skills”. A Goal is NOT a specific course. When you add **Activities** to your goal a course or courses may be among the activities you add to help you achieve the goal.

**\*Every IDP MUST have at least one goal.**

## Add a Goal, Continued

**\*You must complete all Required Fields (\*).**

**5** Select the appropriate **Priority** for this goal. (optional)

**\*6** \*Select a **Target Date** for meeting the goal from the calendar . Select the month first, and then the specific day to get the information to populate the field.

**7** To add more goals: click **Save and Add Another**.  
To continue forward with no more goals: click **Finished**.

Welcome | Search Catalog | Check System | Sign Out

**DLA LMS** Home Catalog

### Add Goal to Plan Help

[← Back](#)

You have chosen to add a goal to your Plan. Enter the details for the goal below or use the Goal Wizard, then choose Save to add the goal to your plan. To cancel, choose the Back option.  
You can fill out the Goal Details section below to add an ad-hoc Goal. If you would like instead to add Goals based on your competencies, add goals for a targeted job position, copy goals from other plans or even to adopt another user's Goals then use the Goal Wizard

**Individual Development Plan FY 11**

Plan Period: DSCP FY11 IDP  
Plan Purpose:  
Expiration Date: 9/30/2011  
Effective Date: 2/1/2010

[Goal Wizard](#)

**\* = Required Fields**

#### Goal Details

Goal Type: Other Finished Save and Add Another Cancel

Goal Number:


\* Goal Name:

Goal Description:

Goal Category:

Section:


Priority:  **5**

\*6 \* Target Date:  

Target Value:   
(1000,001)

Stretch Value:   
(1000,001)

## Add Activities to Goals

1 Click the small blue arrow  beside the **Goal Name** to reveal the **Add Activity** button.

2 Click the **Add Activity** button.

3 Click **Search for Activity** if you want to search the catalog for trainings and/or Tuition Assistance.

\*For Tuition Assistance, you must choose **Undergraduate** or **Graduate** courses.

\***ONLY** click on **Unique Training** for unique trainings outside of tuition assistance and the catalog.

4 Type in **Keywords** to search the catalog. **Note:** Keep search criteria as simple as possible.

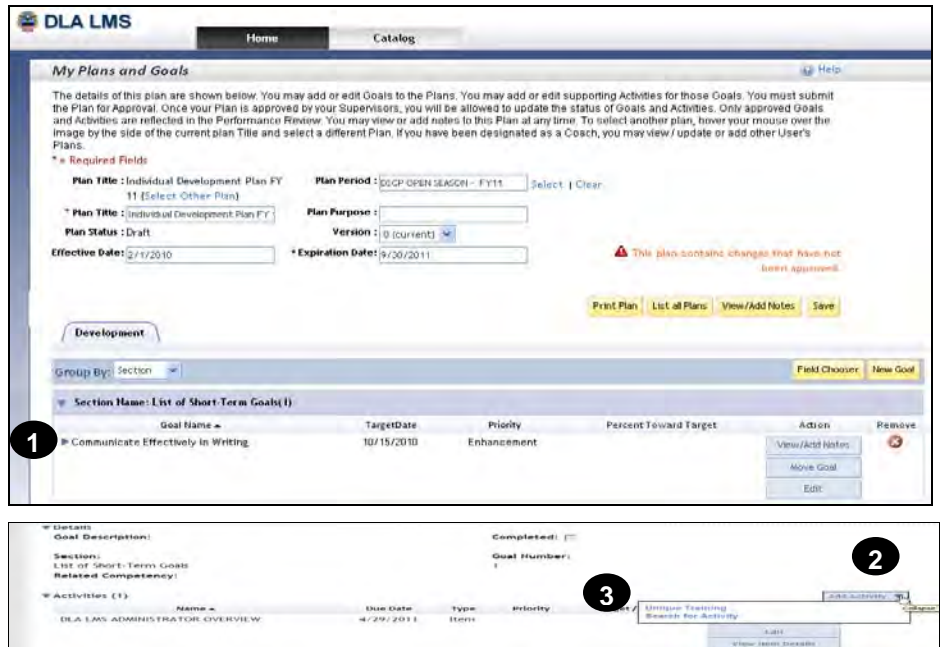
5 Click **Search**

6 Review the **Item Search Results** to find appropriate activities/courses.

7 Click the course name under **Title** to see the description. See Note at the bottom of the illustration to the right.

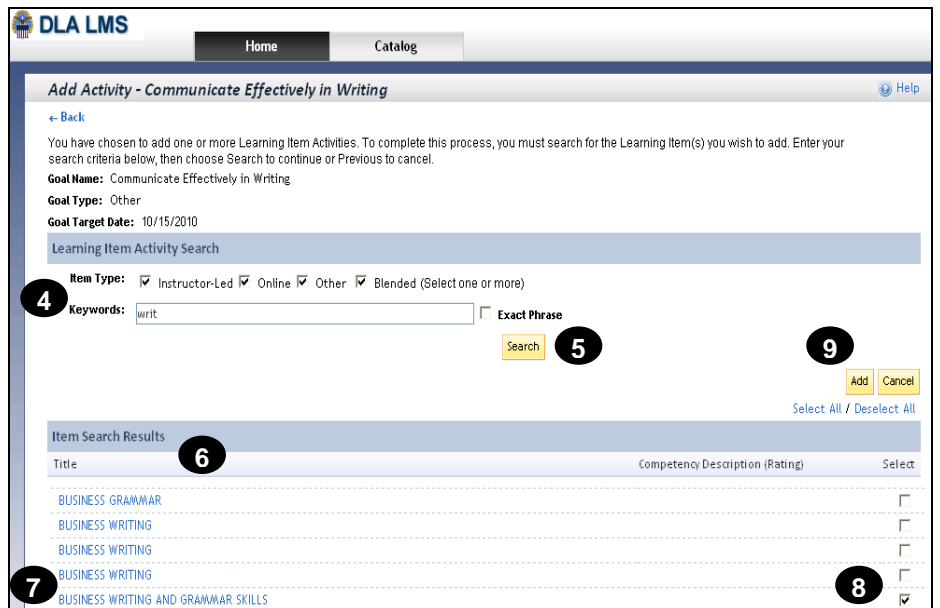
8 Click the box in the **Select** column to select the course.

9 Click **Add**.



The screenshot shows the 'My Plans and Goals' interface. At the top, there are navigation tabs for 'Home' and 'Catalog'. Below that, the 'My Plans and Goals' section displays details for a plan titled 'Individual Development Plan FY 11'. The plan status is 'Draft', and the effective date is 2/17/2010. The plan period is 'OCCP OPEN SEASON - FY11'. The plan purpose is 'Enhancement'. The plan status is 'Draft', and the version is '0 (Current)'. The expiration date is 9/30/2011. There are buttons for 'Print Plan', 'List all Plans', 'View/Add Notes', and 'Save'. Below the plan details, there is a 'Development' section with a 'Group By: Section' dropdown and a 'Field Chooser' button. The 'Section Name: List of Short-Term Goals (1)' section shows a table with columns for Goal Name, TargetDate, Priority, Percent Toward Target, Action, and Remove. The first row is 'Communicate Effectively in Writing' with a target date of 10/15/2010 and a priority of 'Enhancement'. Below the table, there is a 'Details' section with a 'Goal Description' and a 'Completed' checkbox. The 'Activities (1)' section shows a table with columns for Name, Due Date, Type, Priority, and Action. The first row is 'Unique Training Search for Activity' with a due date of 4/29/2011 and a type of 'Item'. There are buttons for 'View/Add History', 'Move Goal', and 'Edit'.

**Note:** When using **Unique Training**, type in the Activity Name of the conference or training NOT found in the catalog that you would like to attend. If it is in the catalog, choose **Search for Activity**.



The screenshot shows the 'Add Activity - Communicate Effectively in Writing' page. The page has a 'Back' button and a 'Help' button. The main content area contains the following information: 'You have chosen to add one or more Learning Item Activities. To complete this process, you must search for the Learning Item(s) you wish to add. Enter your search criteria below, then choose Search to continue or Previous to cancel.' The goal name is 'Communicate Effectively in Writing', the goal type is 'Other', and the goal target date is 10/15/2010. Below this is the 'Learning Item Activity Search' section. The 'Item Type' section has checkboxes for 'Instructor-Led', 'Online', 'Other', and 'Blended', all of which are checked. The 'Keywords' field contains 'writ' and there is an 'Exact Phrase' checkbox. A 'Search' button is located to the right of the keywords field. Below the search section is the 'Item Search Results' table. The table has three columns: 'Title', 'Competency Description (Rating)', and 'Select'. The first row is 'BUSINESS GRAMMAR' with a rating of 4.0 and a select box. The second row is 'BUSINESS WRITING' with a rating of 4.0 and a select box. The third row is 'BUSINESS WRITING' with a rating of 4.0 and a select box. The fourth row is 'BUSINESS WRITING' with a rating of 4.0 and a select box. The fifth row is 'BUSINESS WRITING AND GRAMMAR SKILLS' with a rating of 4.0 and a select box. At the bottom right of the table, there are 'Add' and 'Cancel' buttons and a 'Select All / Deselect All' link.

**Note:** For Step 7: **Do not click** the **Request Schedule** or **Add to To-Do List** buttons on the description page. Doing so will bypass the IDP process and add the item directly to your To-Do List.

**\*If your goal is to maintain your current position and you require no training, do not select any activities.**



## Add Activities to Goals, Continued

**10** Click the **Edit** button to add a priority to your activity.

**11** Click on the drop down next to **Priority**.

**Note:** If this step is not completed, your activities will default to 3 if not updated.

Choose the **Priority** for your Activity:

**1. Mission Essential**—

Training required during the forthcoming annual training cycle considered essential to mission accomplishment.

**2. Enhancement**—Training, the omission of which might impact adversely on complete and qualitative mission accomplishment.

**3. Optional**—Training of a broadening nature that might be helpful in enhancing the overall performance levels of employees already considered being competent.

**12** Click **Apply Changes** when finished.

Section Name: None(1)

Goal Name ▲	TargetDate	Priority	Percent Toward Target	Act
goal	1/31/2011			View/A Move E

►Details

▼Activities (1)

Name ▲	Due Date	Type	Priority	Target / Stretch	Action
7 HABITS OF HIGHLY EFFECTIVE PEOPLE	1/31/2011	Item			View/Add Notes <b>10</b> Edit View Item Details

Section Name: None(1)

Goal Name ▲	TargetDate	Priority	Percent Toward Target	Act
goal	1/31/2011			View/Ad Move Ed

►Details

▼Activities (1)

Name ▲	Due Date	Type	Priority	Target / Stretch	Action
7 HABITS OF HIGHLY EFFECTIVE PEOPLE	1/31/2011	Item			View/Add Notes View Item Details

\* Activity Name: 7 HABITS OF HIGHLY EFFECTIVE PEOPLE

Related Item: 7 HABITS OF HIGHLY EFFECTIVE PEOPLE

\* TargetDate: 1/31/2011

Priority: **11** 1 (Mission Essential)  
2 (Enhancement)  
3 (Optional)

**12** Apply Changes

**\*Follow Steps 1-12 to add more activities to goals when needed.**

## Submit IDP for Supervisory Approval

- 1 Once you have finished adding Goals and Activities, on the **My Plans and Goals** page click the **Save** button.
- 2 Click the **Print Plan** button to print and discuss with your supervisor.
- 3 Discuss plan with your supervisor and come to an agreement on goals and activities. (This is done outside of LMS).
- 4 Re-enter LMS and go back to your plan. Click the **Submit for Approval** button.

The system will notify your supervisor that the IDP needs to be approved. Your screen will show “**Currently this plan is pending approval. You can continue to make changes, however you cannot submit for approval until the submitted version is approved or rejected.**”

DLA LMS

Welcome | Search Catalog | Check System | Sign Out

Home Catalog

### My Plans and Goals

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\* = Required Fields

Plan Title : Individual Development Plan FY 11 (Select Other Plan) Plan Period : DSCP OPEN SEASON - FY11 Select | Clear

\* Plan Title : Individual Development Plan FY 1 Plan Purpose :

Plan Status : Draft Version : 0 (current)

Effective Date : 2/1/2010 \* Expiration Date : 9/30/2011

This plan contains changes that have not been approved.

Print Plan List all Plans View/Add Notes Save Submit for Approval

Development

Title: Add Description

Group By: Section Field Chooser New Goal

Section Name: List of Long Term Goals(2)

Section Name: List of Short-Term Goals(2)

**Note:** Prior to submitting your IDP, printing your plan to discuss with your supervisor eliminates sending your IDP back and forth within LMS.

**Note to Supervisors:** Click this link to learn how to [Approve or Disapprove](#).

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