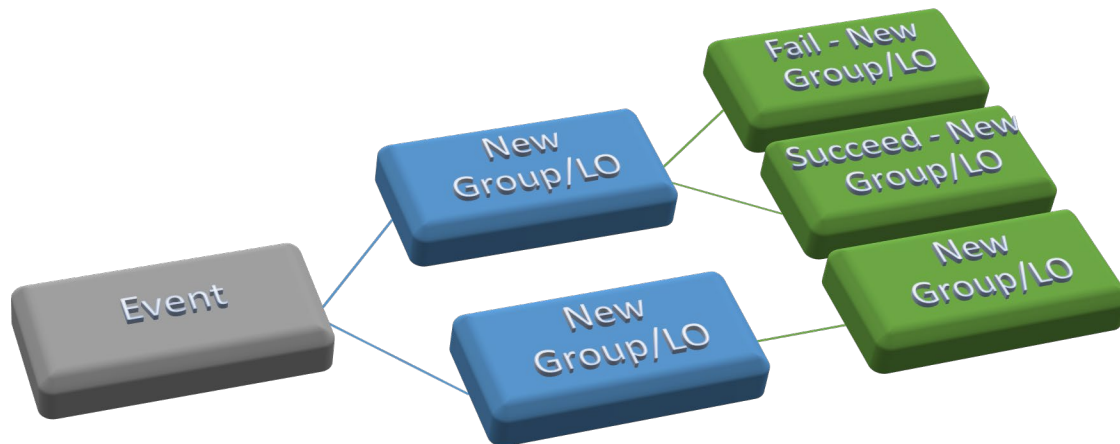# LEARNING PLANS

Add automation to learning paths, and efficiency and convenience to your role as Admin/Author in the Adobe Captivate Prime LMS

ABSTRACT
Create Learning Plans that automatically enroll learners in new Groups and/or Learning Objects when they meet certain criteria.

Ashwini Jaisim

- ✓ Do you want new hires enrolled in pre-determined training?
- ✓ Would you like successful course completion to automatically lead to enrollment in new training?
- ✓ Would it be helpful if employees who changed locations were automatically enrolled in new Groups – and assigned learning pertinent to that Group?
- ✓ Would you like to make Catalogs of learning material available to learners contingent on completion of a certain Course?
- ✓ Would you like to drive learning along a path with learning objects as stepping stones?

Contents

A Learning Plan

A Learning Plan is a set of rules that, once configured in the LMS, constantly watch for certain learning events and upon their occurrence, perform a specified set of actions. The events that are watched for and acted upon cover a wide gamut. Primarily, they include the following type of occurrences:

- When a user/set of users is newly added to the LMS.
- When a user/set of users is added to a particular User Group.
- When a user/set of users completes a training either successfully or unsuccessfully.
- When a user/set of users achieves a particular Skill.
- A specific date.

The actions that are triggered by these occurrences include:

- The assignation of a new training
- Adding the user/set of users to a new User Group.

Why use a Learning Plan?

Frequently in training management there are recurring events that require straightforward actions. For example, when new learners are added to the system and require onboarding. Although they may be simple procedures, they do consume time and other resources. Therefore, in the interest of conserving resources, you could choose to use a Learning Plan to automate certain processes.

Create a Learning Plan in Adobe Captivate Prime

First, it is important to note that a Learning Plan is not a Learning Object (LO). It is an "automated enrollment plan".

Note: In the Adobe Captivate Prime LMS an LO only refers to a Certification, a Course, Learning Program, or Job Aid.

When you log in as Admin/Author, go to Learning Plans and click on 'Add' or 'Add Learning Plan' as in the screenshot below.

Now, name your Learning Plan. For example, if it is a compulsory security training requirement for all new hires, you could call it "Mandatory Security Training". Next, In the 'Occurs when' drop-down menu you must select the 'event' that triggers this Learning Plan ('New learner is added', 'Learner gets added to a group', 'Learner completes a learning object', 'Learner achieves a Skill level', or 'On a specific date').
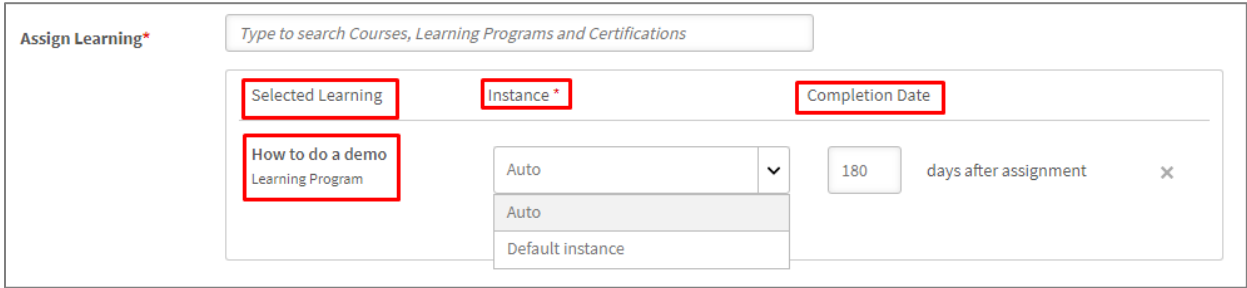
[The event, 'Learner completes a learning object' is an interesting use case where a Learning Plan can be used to automatically enroll learners who have completed a beginner's courses in to more advanced courses. In this manner, a learning path can be created to continuously direct a learner's progress in the LMS.]

Then assign the Learning Object (enter the name of the Certification, Course or Learning Program) to the group.
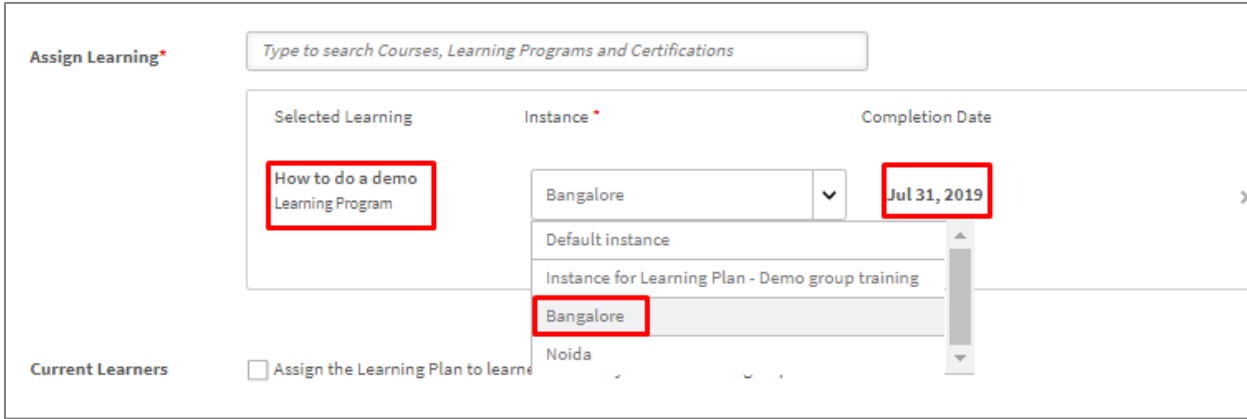

Note: In all these events you must further specify group/learning object/Skill & level/date.

Once you pick the LO you want to assign, decide to which 'Instance' of this training you wish to enroll the learner(s). If you pick 'Auto' from the drop-down menu, you must specify the number of days from enrollment within which the learner must complete the LO. If the course has another specified instance and you choose that, then the deadline will be as per that specific instance.

E.g. If there are two other instances, one in Bangalore and one in Noida (different locations in India), you would choose the one you want your learner to attend.
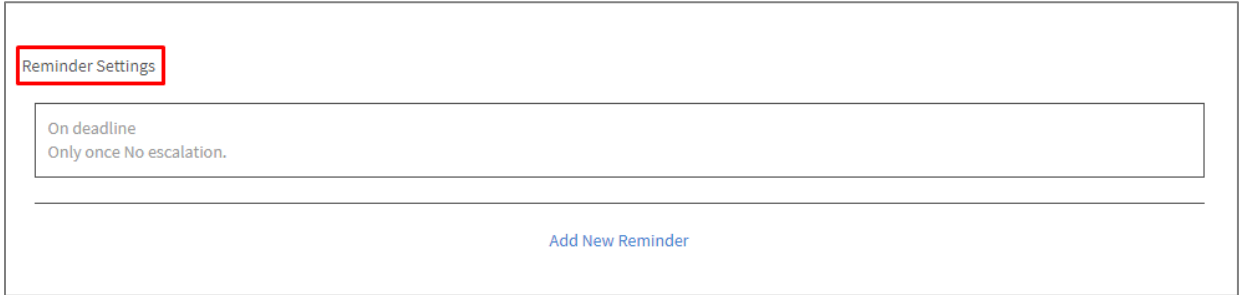

The 'Default Instance' is what the learner will automatically be enrolled in if you do not specify an Instance.

If you wish learners to receive reminders to complete this training requirement, you can set this up here too.

Once you create and save a Learning Plan, it will appear under 'Learning Plans', as below. When you have several Learning Plans in place, you can view them as shown below. You can view 'All' or those you have 'Enabled' or 'Disabled' and filter them as shown in the drop-down menu, according to when they occur.
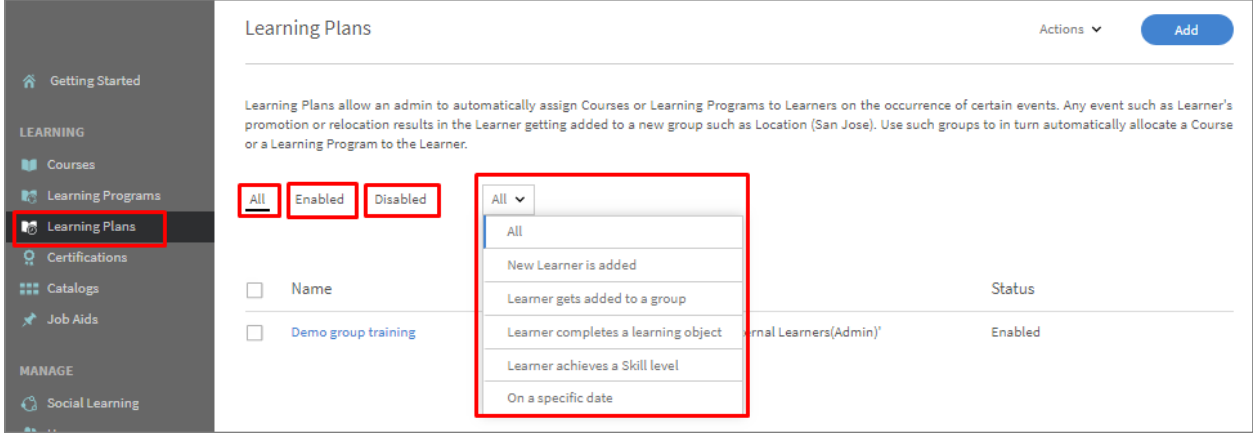
To 'Enable', 'Disable' or to 'Delete' a Learning Plan, select the checkbox next to the Learning Plan you choose, and go to the 'Actions' drop-down menu as seen below.
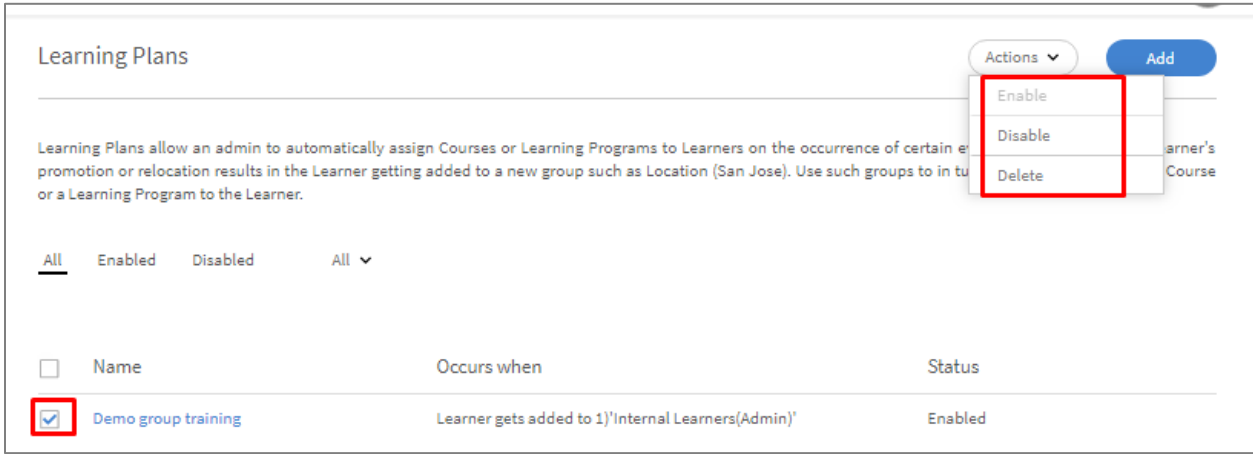
Please Note: Currently you cannot edit a Learning Plan. If you wish to modify the LO, event or user group within a Learning Plan, you must disable/delete the current one and create a new Learning Plan.

Use Cases

Automatically enroll newly added learners to an orientation program

Organizations may recruit employees almost on a daily or weekly basis. A Learning Plan lets you assign learning to new hires immediately, avoiding any manual or other delays and enabling timely onboarding.

Configure a Learning Plan to ensure that every new learner is assigned an orientation training as soon as they are added to the LMS.

Follow the process described above under 'Create a Learning Plan'. In the 'Occurs when' drop-down menu, select 'New Learner is added'. For example:

Once you have selected the event, you can assign the learning and an instance of that learning:

Set a reminder if you think it is required.

Automatically enroll learners who get promoted or relocated, to training programs for their new roles. Other similar events that trigger similar actions.

A learner who experiences either a relocation or a promotion will usually find themselves added to a new User Group. You can create a Learning Plan so that when such an event occurs, he/she is automatically assigned required training. See below:

Similarly, there may be other such movements of learners from one User Group to another that require training for their new role. As Admin you could create these User Groups and automatically assign training programs when learners are added to them.

Automatically assign follow up training to learners who fail a training program.

In this instance, a learner who completes an assigned training but fails, may need to take some additional training to ensure he gains enough understanding.

The screenshot below shows you how to create a Learning Plan for these learners.

Add Learning Plan

Learning Plan Name *   Re-learn

Occurs when *   Learner completes a learning object

Completed Learning *   How to do a demo
Learning Program

Completion Status   Completed but Failed

Select Group   Type to search a group

Add More Learners

Action*   ● Assign Learning   ○ Add to Custom User Group

Assign Learning*   Type to search Courses, Learning Programs and Certifications

Selected Learning	Instance *	Completion Date	
Never again Certification	Not Applicable	1 days after assignment	×

Assign after   1   Days

Current Learners   ☐ Assign the Learning Plan to Learners who have already completed the selected learning.

Note: You can "chain link" Learning Plans by assigning learning to the Group that learners move to to finish the new training, and so in this way, learners automatically and continuously move from group to group.

For example, learners who fail Learning Program A, may be automatically enrolled in Group X which is assigned Course D. On *successful* completion of Course D, learners may be assigned Learning Program A again. On successful completion of LP-A, they will then be assigned LP-B, and so on.
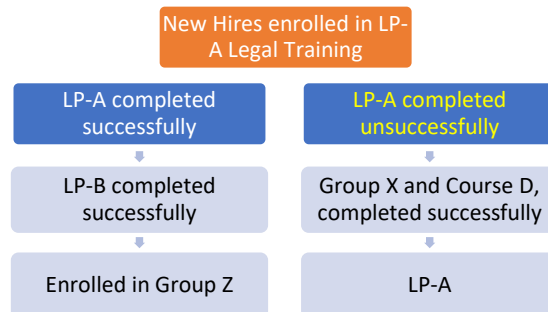
Ensure learners get access to a new Catalog only after they complete a specific training program.

Sometimes, e.g. for security reasons, employees must complete specified training before they can have access to other training. In cases like this you can create a Learning Plan so that a learner must complete a stipulated training before they can access a certain catalog. The Catalog would be available to a certain group, and the Learning Plan would move the learner to this Group once s/he completes the stipulated learning.

Assign Legal Training Course to Learner	→	Learner successfuly completes Legal Training Course	→	Autmatically enrolled in new User Group with access to Catalog

Create a Learning Plan chain to drive learners for over a year with specified goals.

Via the use cases described above, learners can automatically move along a learning path from User Group to User Group and training to training, for over a year, achieving training Goals.

Create a new Learning Plan to drive a specific training initiative for new learners, and simultaneously assign this training to existing users in the system.

When you create a new training program and assign it to a new learner/User Group, you have the option to assign this training to existing learners in the System. Check the box at the bottom of the page to assign it to them as well.

The events include –

When you add a learner to a new User Group – assign the new learning to all other learners who are already in this new User Group and have not completed this particular learning.

When a Learner/User group achieves a Skill Level – you can assign the new learning to all other learners who have achieved this same Skill Level.

When a Learner/user Group completes an LO – you can assign the new learning to all the other learners who have competed the same LO by clicking on the checkbox at the bottom of the page.

The Case Study below shows how a large multinational organization uses Learning Plans to advantage. (The Company name has been changed to protect privacy.)

Biz Internal

Biz Internal, the L&D team at Biz uses Learning Plans extensively.

The Learning Objects used in their Learning Plans are only Certifications and Learning Programs. Employees are constantly being hired, moved across Business Units, locations and added to new user groups for a variety of reasons. The Biz Internal team has Learning Plans across the organization to automate enrollment into about 10 Certifications on the occurrence of these events. Custom Admin roles created for various teams within the organization use Learning Plans with Learning Programs for their respective groups.

The example below shows a Learning Plan for a Certification called "Mandatory Code of Business Conduct Training".

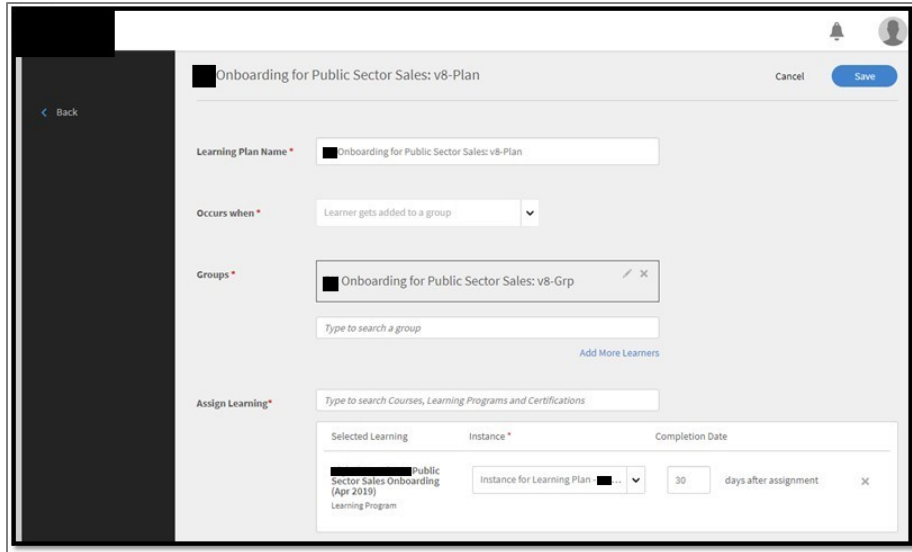The training is assigned to all learners who are added to specific groups:

- Worker Type (regular)
- Worker Type (intern)

- Worker Type (agency temp)
- Worker Type (paid temp (fixed term))

As you can see, there is no specific instance of the Certification to which learners are enrolled. A learner who is added to any of the specified groups is automatically assigned this training. The completion date is set to 30 days after assignment of training.
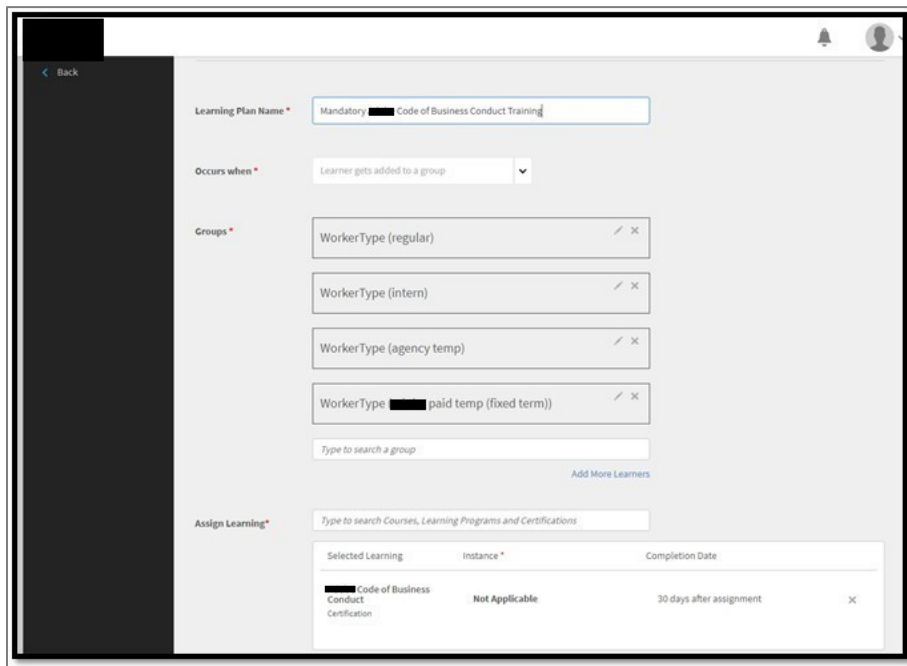
The next screenshot is an example of a Learning Plan that automatically enrolls people into a Learning Program for learners in a sales group. The Learning Plan is called "… Onboarding for Public Sector Sales: v8-Plan". It occurs when a learner gets added to the '… Onboarding for Public Sector Sales: v8-Grp' group. There is no specific instance of this Learning Object. You can see that the learner must complete it within 30 days of assignment.

Summary

Use a Learning Plan to ease the workload of an Admin/Author. The automation of assigning LOs on the occurrence of certain events is a useful tool to ensure timely assignation of training requirements. It also ensures that no learners are missed out and that a process is accurately followed. You can keep track of all the Learning Plans in the Learning Plans page. You can filter them, and easily enable, disable or delete them as required. Learn more about creating Learning Plans in Adobe Captivate Prime here.