

Module 3

Phase 2: Create Your IDP

IDP Create Phase



IDP Create Phase (cont.)

This module will review all of the steps involved in creating your IDP.

You will be able to:

- Navigate to the IDP in SATERN
- Verify Profile Details
- Create a new plan
- Enter plan information
- Add goals to your plan
- Add development activities to your plans

Verify Profile Details

When you log in to SATERN, your Learner tab will display.

- To verify your supervisor and add a coach or mentor that you want to review your IDP, click on your name on the Learner card to access your profile.

The screenshot displays the SATERN interface. At the top left is the NASA logo. The main header contains the text "SATERN" and "System for Administration, Training, and Educational Resources for NASA". Below this are two tabs: "Learner" (selected) and "Admin". The user's name, "JAMES S MITCHELL", is displayed in a blue box and is circled in red. A green callout box with the text "Click on your name." points to the name. To the right of the name is a warning message: "Your Talent Profile is Incomplete" with a yellow warning icon. Below the name is a "Learning Plan" section with a search bar, a "Show: Everything" dropdown, and a list of items including "No due date", "BACKUP AND SECURITY SETTINGS IN MICROSOFT WINDOWS XP" (In progress), and "BOOKS 24 X 7". To the right is a "Catalog" search bar and an "Easy Links" section with links for "Advanced Catalog Search", "Approvals", "Books 24x7", "Calendar of Scheduled Offerings", and "Options and Settings".

To Verify your Supervisor

1. Click on the pencil icon (✎) in the Employee Information section.
2. Verify that your supervisor is correct. If not, Click browse (🔍) to search for and select your supervisor
3. Set the **Supervisor By-pass Flag** to **Yes (Y)**.
4. Click **Save**.

Employee Information

Learner ID: C-jsmitchell4

Edit Employee Information

* Required Field(s)

Resume Location

Supervisor **2** 🔍 lksmith

Organization 🔍

Coach 🔍

Summary Statement

3990 characters remaining

Supervisor By-pass Flag: No (N) **3** Yes (Y) **4**

Save

Only set the **Supervisor By-pass Flag** to **Yes (Y)** if you have changed your supervisor. In addition, before changing your supervisor, be sure any old IDPs have been approved to avoid routing errors.

Add a Coach/Mentor

1. Click browse (🔍) to search for and select your coach/mentor.
2. Once selected, click **Save**.

The screenshot shows a web form titled "Edit Employee Information". The form contains several fields: "Resume Location", "Supervisor", "Organization", "Coach", and "Summary Statement". The "Coach" field has a search icon (🔍) next to it, which is circled in red. A yellow circle with the number "1" is also next to the search icon. Below the "Summary Statement" field, there is a character count "3990 characters remaining" and a dropdown menu for "Supervisor By-pass Flag" with the value "No (N)". At the bottom right, there are two buttons: "Save" and "Cancel". The "Save" button is circled in red, and a yellow circle with the number "2" is next to it.

Navigate to IDP

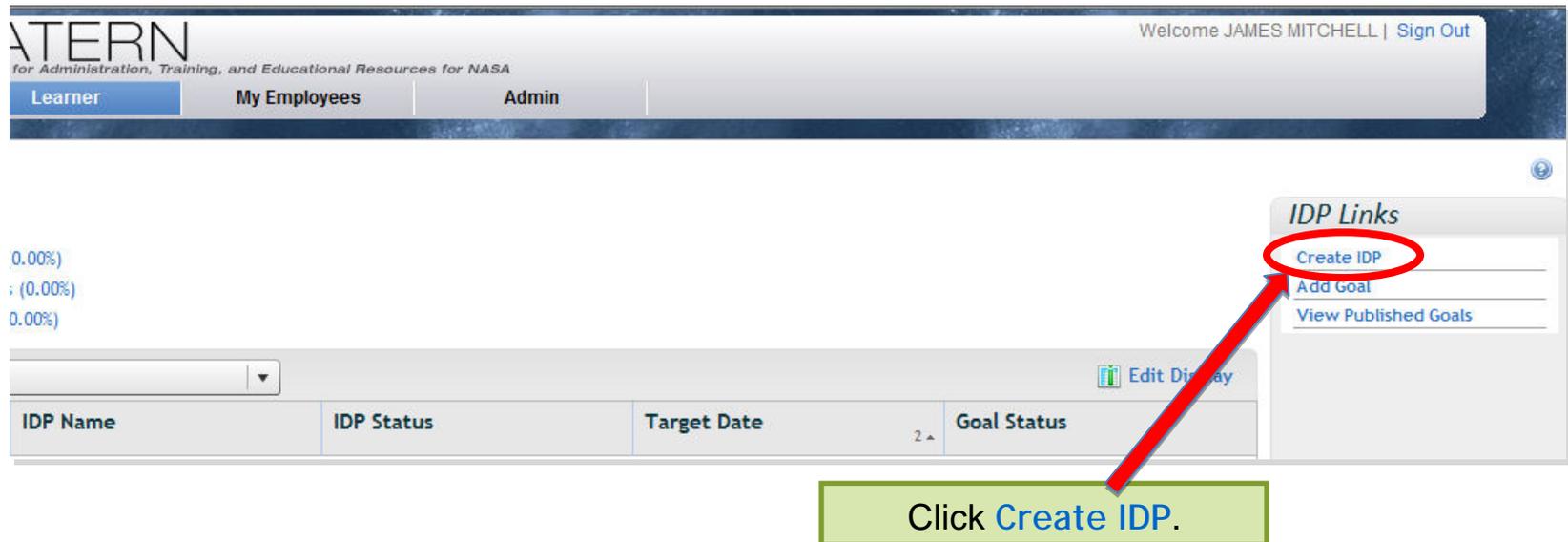
Click the **Individual Development Plan(s)** link in the Easy Links section

Alternatively, you will find the **IDP Goals** Pod on the Learner tab, under the Easy Links section.

The screenshot displays the SATERN interface. At the top is a search bar labeled 'Catalog'. Below it is the 'Easy Links' section, which contains a list of links: 'Advanced Catalog Search', 'Approvals', 'Books 24x7', 'Calendar of Scheduled Offerings', 'External Requests (SF-182)', 'Individual Development Plan(s)', 'Options and Settings', 'Record Learning', 'Reports', 'SATERN Guides & Aids', and 'Talent Profile'. The 'Individual Development Plan(s)' link is circled in red. Below the 'Easy Links' section are four pods: 'Curricula' (showing 1 overdue, 0 due in 30 days, and 0 due later), 'Learning History' (showing 1 item completed in the last 30 days), 'Competencies' (showing no assigned competencies), and 'IDP Goals' (showing 0% complete, 0% in progress, and 100% behind). The 'IDP Goals' pod is also circled in red.

Create a New Plan

Now that you have navigated your way to the IDP, it is time to create your plan.



The screenshot shows the SATERN user interface. At the top, the logo "SATERN" is displayed on the left, and the user's name "Welcome JAMES MITCHELL" and a "Sign Out" link are on the right. Below the header, there are three navigation tabs: "Learner" (selected), "My Employees", and "Admin".

The main content area shows a table with columns for "IDP Name", "IDP Status", "Target Date", and "Goal Status". The table is currently empty. To the right of the table is a sidebar titled "IDP Links" containing three buttons: "Create IDP", "Add Goal", and "View Published Goals". The "Create IDP" button is circled in red, and a red arrow points from a green box below the arrow to this button. The green box contains the text "Click Create IDP."

IDP Name	IDP Status	Target Date	Goal Status
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Enter Plan Information

The IDP system requires that you provide some information about your new plan.

- This information will help you find your plan in the future and make sure your plan is active on the correct date.

The screenshot shows a 'Create IDP' dialog box with the following fields:

- IDP Type ***: A dropdown menu with 'Development' selected. A red arrow points to this field.
- IDP Name ***: An empty text input field. A red arrow points to this field.
- Description**: A rich text editor with formatting options (B, I, U, list) and an empty text area.
- IDP Period ***: A dropdown menu with 'Please Select One' selected. A red arrow points to this field.

A green callout box on the right contains the text: **IDP Type, IDP Name and IDP Period are required fields.**

At the bottom of the dialog are three buttons: 'Save and Add Goal', 'Save and Close', and 'Cancel'.

The **IDP Name** should be intuitive, so that others (e.g., supervisor, coach) can identify this plan.

Enter Plan Information (cont.)

- The IDP Period is the time period during which you intend to reach the goals on the plan.
- Standard date periods are provided for selection.
- Choose the 2-Year Performance Year if beginning mid-year, because Calendar Year is no longer an option

The screenshot shows the 'Create IDP' form with the following fields:

- IDP Type: Development
- IDP Name: My IDP
- Description: (empty text area)
- IDP Period: Please Select One

The IDP Period dropdown menu is open, showing the following options:

- Performance Year 2010 (3 year) (4/30/2010 to 4/29/2013)
- Performance Year 2011 (2 year) (4/30/2011 to 4/29/2013)
- Performance Year 2011 (3 year) (4/30/2011 to 4/29/2014)
- Performance Year 2012 (2 Year) (5/1/2011 to 4/30/2013)
- Performance Year 2012 (3 Year) (5/1/2011 to 4/30/2014)
- Leadership Programs - Physical Year 2012 (9/30/2011 to 9/29/2012)
- MLLP - 14 Months (12/1/2011 to 4/28/2013)
- Calendar Year 2012 (1/1/2012 to 12/31/2012)
- Performance Year 2013 (1 Year) (5/1/2012 to 4/20/2013)
- Performance Year 2013 (2 Year) (5/1/2012 to 4/30/2014)

Annotations in the screenshot:

- A green box with the text 'Click the drop down.' points to the dropdown arrow.
- A yellow circle with the number '1' is next to the dropdown arrow.
- A red circle highlights the dropdown arrow.
- A yellow circle with the number '2' is next to the 'Performance Year 2013 (1 Year) (5/1/2012 to 4/20/2013)' option.
- A red oval highlights the 'Performance Year 2013 (1 Year) (5/1/2012 to 4/20/2013)' option.
- A green box with the text 'Click on applicable Date Period.' points to the highlighted option.

Enter Plan Information (cont.)

Finish creating your Plan:

- Click **Save and Close** when finished.

The screenshot shows a 'Create IDP' dialog box with the following fields and options:

- IDP Type ***: Development (dropdown menu)
- IDP Name ***: My IDP (text input field)
- Description**: A rich text editor with formatting options (B, I, U, list) and a large text area.
- IDP Period ***: Performance Year 2013 (1 Year) (5/1/2012 to 4/30/2013) (dropdown menu)

At the bottom, there are three buttons: 'Save and Add Goal', 'Save and Close' (circled in red), and 'Cancel'.

Enter Plan Information (cont.)

- Let us quickly review:
 - If applicable, you added a Coach/Mentor to your profile.
 - You created a new plan that contains the necessary plan information: IDP Type, IDP Name and IDP Period.
- Your Plan Information is complete.

My IDPs Workspace

Goal Status

- Complete (0%)
- In Progress (0%)
- Behind (0%)

Select IDP: My IDP (Draft) Edit Display

Submit for Approval Hide IDP Details

Create IDP >> Create Goals >> Submit for Approval

Status: Draft

IDP Type: Development

Description: Text here

IDP Period: (Performance Year 2013 (2 Year)) 5/1/2012 to 4/30/2014

Edit IDP

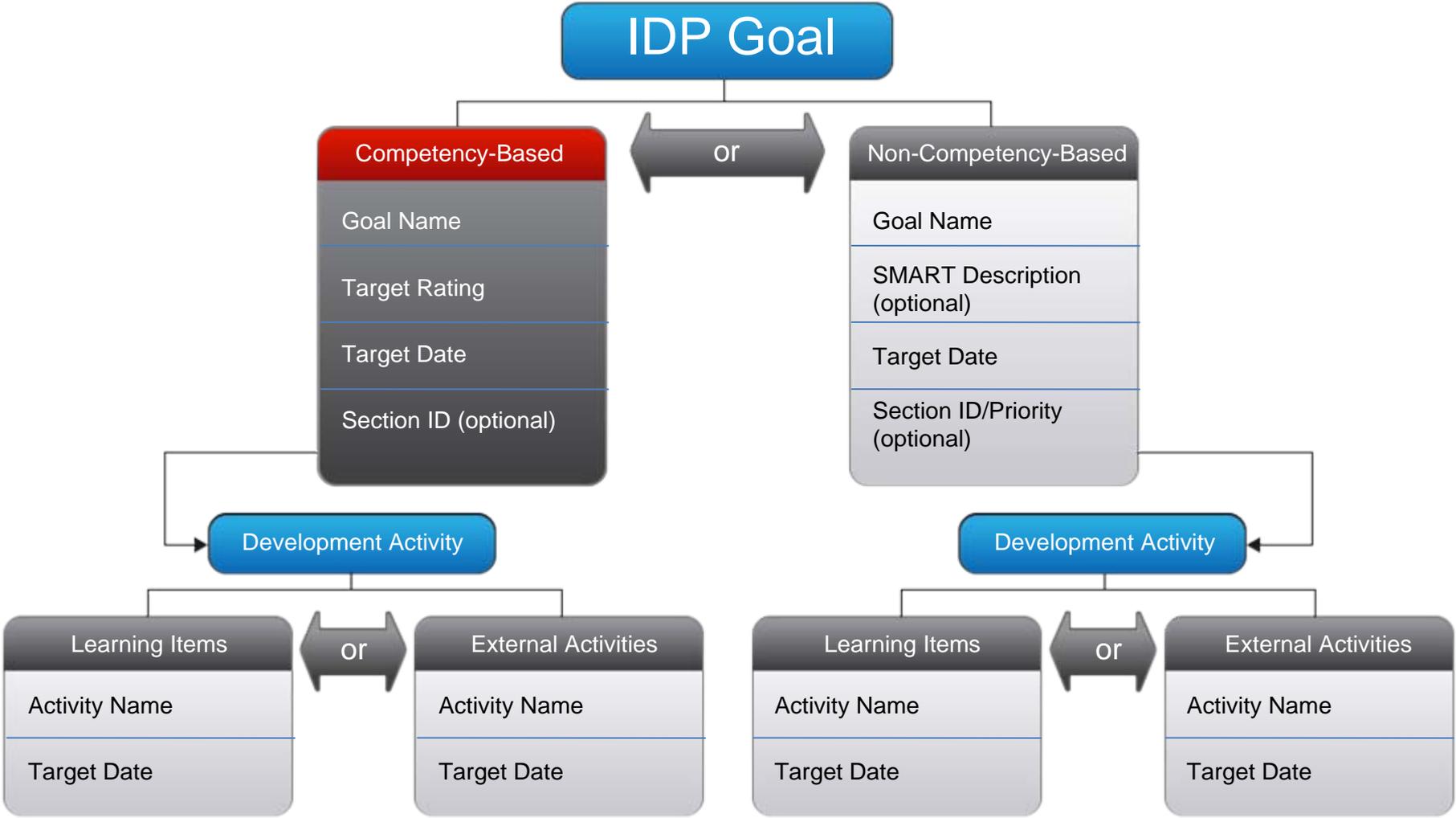
- Add/Edit IDP Notes
- Add Goal
- Print IDP
- View Changes Log
- Delete IDP

Goal Name	1	Target Date	2	Description
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IDP Flow Chart



Competency-Based



Add a Competency-Based Goal

- The next step in creating your plan is to add goals.
- There are two types of goals: competency-based goals and non-competency-based goals.
- In the next several slides, you will learn how to add a competency-based goal to your plan.

Add a Competency-Based Goal (cont.)

The intent of a competency-based goal is to build skills or develop expertise in a NASA competency from the Competency Management System.

My IDPs Workspace

Goal Status

- Complete (0%)
- In Progress (0%)
- Behind (0%)

Select IDP: My IDP (Draft) [v]

Submit for Approval [button] Edit Display [button]

Hide IDP Details [button]

Create IDP [arrow] Create Goals [arrow] Submit for Approval [arrow]

Status: Draft

IDP Type: Development

Description: Text here

IDP Period: (Performance Year 2013 (2 Year)) 5/1/2012 to 4/30/2014

Click **Add Goal.**

Edit IDP [button]
Add/Edit IDP Notes [button]
Add Goal [button]
Print IDP [button]
View Changes Log [button]
Delete IDP [button]

Goal Name	Target Date	Description
1	2	

Add a Competency-Based Goal (cont.)

Use the IDP Goal Wizard to create competency-based goals.

Add Goal

My IDP (Development) [Goal Wizard](#) [Goal Notes](#)

Goal Name *

Description

Click **Goal Wizard**.

Priority Start Date Target Date * Section

Activities [Create New Activity](#)

Activity Name	Status	Target Date
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Save Save and Close Close

Add a Competency-Based Goal (cont.)

- The first thing you will be asked to do is to choose your Goal Type.
- Choosing Competency will allow you to search the CMS dictionary and choose a CMS competency on which to base your goal.

Goal Wizard

Help

You have chosen to add a goal to your IDP. Specify whether you wish to add a competency-related goal, copy goals from another IDP or you wish to Adopt another Learner's published Goals. If you have a Targeted Job Position, you may choose to directly search for Competency based goals for your targeted Job code. If you wish to cancel adding a goal, close the window.

My IDP

IDP Period: PY 2013 - 1 Year
Expiration Date: 4/30/2013
Effective Date: 5/1/2012

Choose Goal Type

Add Competency Related Goals

Add Goals from Other IDPs

Next

Click **Next**.

Select **Add Competency Related Goals**.

Add a Competency-Based Goal (cont.)

- When you choose a competency-based goal, you will search the CMS by entering keywords.
- You can choose to:
 - **Search from all Competencies** within the CMS catalog.
 - **Show Only Competencies Assigned to You**: this includes competencies assigned to your job ID and competencies you have added to your CMS profile.
 - **Show Competencies Assigned to Job Position**: this includes competencies related to a specific job ID.

The screenshot shows the 'Search Competencies' interface. At the top right, there are 'Previous' and 'Next' buttons, with the 'Next' button circled in red and labeled with a '2'. Below this is a search bar with the text 'Enter Keywords to search for a Competency.' and a text input field containing 'systems engineering', which is labeled with a '1'. To the right of the input field is a green callout box that says 'Enter the **Keywords** you wish to search for and select your category.' Below the input field are five radio button options: 'Search from all Competencies' (selected), 'Show Only Competencies Assigned to You', 'Show Competencies assigned to Job Position', 'Show Competencies associated with Subject Area', and 'Show Competencies associated with Competency Profile'. To the right of these options is another green callout box that says 'Click **Next**.'.

Add a Competency-Based Goal (cont.)

When the keyword search returns selections, choose the best fit:

Goal Wizard

Choose Goal Type > Search Competencies > **Select Competencies**

The list below contains the results from your competency search. Select the competency or competencies you wish to add as goal(s) to your IDP to continue, or choose Previous to go back and modify your search criteria.

Keywords: *systems engineering*
Exact Phrase: *No*
Your Competencies Only: *No*
Job Position: *(none specified)*
Subject Area: *(none specified)*
Competency Profile: *(none specified)*

Previous **Next**
Select All / Deselect All

Competency Search Results

Competency Description	Current Assessed Rating	Required Rating	Gap	Select
Computer Systems and Engineering	0.0	4.0		<input type="checkbox"/>
Systems Engineering	0.0	4.0	Actual:1.00 Req:1	<input checked="" type="checkbox"/>

Add a Competency-Based Goal (cont.)

- In order to finish adding this goal, you need to enter Goal Details.
- There are three required fields:
 - **Goal Name** will default to the competency name, but you can rename it if you wish.
 - **Target Rating** must always default to “1”.
 - **Target Date** is the date by which you want to achieve the goal (typically the end of the plan period).

* = Required Fields

Previous Finished Save and Add Another Close

Select All / Deselect All

Goal Details

Competency	* Goal Name	Last Assessment	* Target Rating (1000)	* Target Date (MM/DD/YYYY)	Select to Add	Create Activities
Systems Engineering	<input type="text" value="Systems Engineering"/>		<input type="text" value="1"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select All / Deselect All

Add a Competency-Based Goal (cont.)

Once you have completed your goal information, click **Finished**.

Click **Finished**.

* = Required Fields

1

Previous **Finished** Save and Add Another Close

Select All / Deselect All

Goal Details						
Competency	* Goal Name	Last Assessment	* Target Rating (1000)	* Target Date (MM/DD/YYYY)	Select to Add	Create Activities
Systems Engineering	<input type="text" value="Systems Engineering"/>		1 ▾	08/24/2012	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2

Select All / Deselect All

Be sure the **Select to Add** box is checked

Add a Competency-Based Goal (cont.)

Let us quickly review:

- You searched the CMS dictionary for a competency on which to base your goal.
- You entered the **Goal Details** required by the IDP tool.

You have now completed the addition of a competency-based goal.

Learning Items



Add a Learning Item

- In order to reach your goals, you will need to engage in some kind of expertise or skill-building activity. In the IDP, these are called **Development Activities**. The IDP tool requires that you add at least one such development activity to each goal.
- There are many different types of development activities, including, but not limited to:
 - Coursework
 - On-the-job training
 - Attending professional conferences

Add a Learning Item (cont.)

- In the IDP tool, development activities fall into two categories:
 - Learning Items: consist of SATERN catalog items.
 - External Activities: include everything else.
- In the next several slides, you will learn how to add Learning Items to your plan.

Add a Learning Item (cont.)

- Go back to the goal you have just created.
- Click on the **Goal Name** to open the goal for editing.

Select IDP: My IDP (Draft) ▼

Submit for Approval ⚠ Changes to the IDP requires approval

Create IDP >>> Create Goals >>>

Status: Draft

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name
+ Systems Engineering	My IDP

Click the **Goal Name**.

Add a Learning Item (cont.)

From the Edit Goal screen, click the **Create New Activity** drop down box and choose **Create Activity using Learning Items**.

Edit Goal

My IDP (Development) Goal Notes

Goal Name * Systems Engineering

Description

Priority Start Date Target Date * 8/24/2012

Section

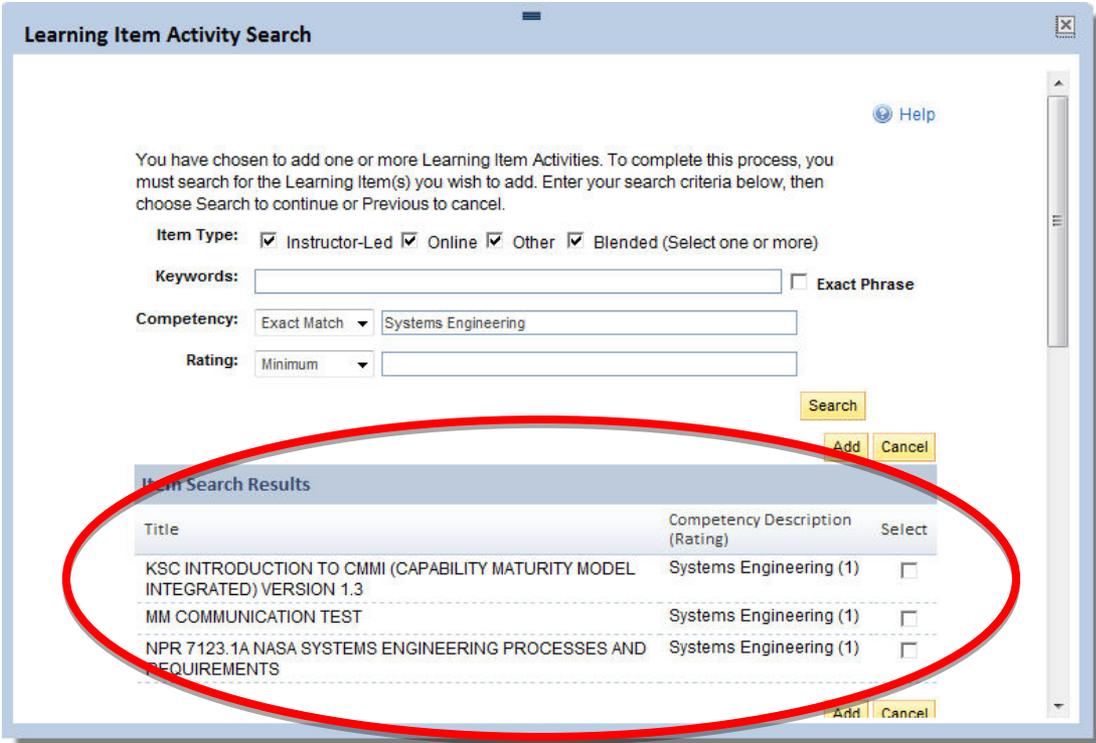
Choose **Create Activity using Learning Items**.

Activity Name	Status

Create New Activity
Create Activity using Learning Items
Create External Activity

Add a Learning Item (cont.)

SATERN automatically searches for and returns a list of Learning Items by competency.



Learning Item Activity Search

[Help](#)

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.

Item Type: Instructor-Led Online Other Blended (Select one or more)

Keywords: Exact Phrase

Competency: Exact Match

Rating: Minimum

Item Search Results

Title	Competency Description (Rating)	Select
KSC INTRODUCTION TO CMMI (CAPABILITY MATURITY MODEL INTEGRATED) VERSION 1.3	Systems Engineering (1)	<input type="checkbox"/>
MM COMMUNICATION TEST	Systems Engineering (1)	<input type="checkbox"/>
NPR 7123.1A NASA SYSTEMS ENGINEERING PROCESSES AND REQUIREMENTS	Systems Engineering (1)	<input type="checkbox"/>

Add a Learning Item (cont.)

- You can search the entire SATERN catalog for other items that will help you achieve your goal.
- Search using the **Keyword** criteria to find other SATERN course titles or descriptions.

The screenshot shows the search interface with the following elements:

- Item Type:** Instructor-Led Online Other Blended (Select one or more)
- Keywords:** Exact Phrase
- Competency:**
- Rating:**
- Search Button:** A yellow button labeled "Search" is circled in red.

Annotations:

- A red arrow points to the **Keywords** input field.
- A green box on the right contains the text: "After you have entered your search criteria, click **Search**."
- A green box at the bottom left contains the text: "Do not use **Rating** as a search criterion."

For a broader search, you will need to remove the competency that populates automatically.

Add a Learning Item (cont.)

- Be aware that competencies have not been assigned to all learning items.
- If you perform a search based on a competency, it is possible that the results may not show all relevant courses, and you may wish to broaden your search.

After you have selected your items, click **Add**.

2

Add Cancel

Title	Competency Description (Rating)	Select
KSC INTRODUCTION TO CMMI (CAPABILITY MATURITY MODEL INTEGRATED) VERSION 1.3	Systems Engineering (1)	<input type="checkbox"/>
MM COMMUNICATION TEST	Systems Engineering (1)	<input type="checkbox"/>
NPR 7123.1A NASA SYSTEMS ENGINEERING PROCESSES AND REQUIREMENTS	Systems Engineering (1)	<input checked="" type="checkbox"/>

1

Select the desired item/s.

Add Cancel

Add a Learning Item (cont.)

At this point, you are able to enter Development Activity Details.

Goal Name	IDP Name	IDP Status	Target Date
 Systems Engineering	My IDP	Draft	8/24/2012

To begin editing activity details, click the **Goal Name**.

From the Edit Goal screen, click the **Activity Name**

Activities			Create New Activity
Activity Name	Status	Target Date	
 NPR 7123.1A NASA SYSTEMS ENGINEERING PROCES	Must be registered	8/24/2012	

Click the **Activity Name**.

Add a Learning Item (cont.)

There are two required fields:

- **Activity Name** will default to the item name, but you can expand it to be more descriptive if you choose.
- **Target Date** will default to the plan expiration date, but you can change it to any date by which you want to complete the activity.

Edit Activity

Activity Notes

Activity Name * NPR 7123.1A NASA SYSTEMS ENGINEERING PROCE

Activity Type Item

Related Item NPR 7123.1A NASA SYSTEMS ENGINEERING PROCESSES AND REQUIREMENTS

Target Date * 8/24/2012

Activity Status Must be registered

Click **Save**.

Save Cancel

Confirm or enter
the required
activity
information.

Add a Learning Item (cont.)

You have now completed the addition of a Learning Item.

Goal Name * Systems Engineering

Description

Priority Start Date Target Date * 8/24/2012

Section

Activities

Activity Name	Status	Target Date
NPR 7123.1A NASA SYSTEMS ENGINEERING PROCE...	Must be registered	8/24/2012

Click **Save and Close**

Add a Learning Item (cont.)

Let us quickly review:

- You searched through the SATERN catalog for Learning Items related to your competency.
- You entered the development activity details required by the IDP tool.

You have now completed the addition of a Learning Item development activity.

Non-competency-based



Add a Non-Competency-Based Goal

- Now you have created a competency-based goal and added Learning Items from SATERN to support your achievement of that goal.
- You also have the option to add goals that are not based on competencies.
- In the next several slides, you will learn how to add a non-competency-based goal to your plan.

Add a Non-Competency-Based Goal (cont.)

From the IDP Workspace click [Add Goal](#):

My IDPs Workspace

Goal Status

- Complete (0%)
- In Progress (0%)
- Behind (0%)

Select IDP: My IDP (Draft) [Edit Display](#)

[Hide IDP Details](#)

Create IDP > **Create Goals** > Submit for Approval

Status: Draft

IDP Type: Development

Description: Text here

IDP Period: (Performance Year 2013 (2 Year)) 5/1/2012 to 4/30/2014

Click [Add Goal](#)

Edit IDP

- Add/Edit IDP Notes
- Add Goal**
- Print IDP
- View Changes Log
- Delete IDP

Goal Name	Target Date	Description
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Add a Non-Competency-Based Goal (cont.)

Now you are ready to complete the details of your goal.

The screenshot shows a web-based form titled "Add Goal" for a user named "My IDP (Development)". The form includes the following fields and sections:

- Goal Name ***: A text input field.
- Description**: A large text area for entering details.
- Priority**: A dropdown menu.
- Start Date**: A date picker.
- Target Date ***: A date picker.
- Section**: A dropdown menu.
- Activities**: A section with a "Create New Activity" dropdown and a table with columns for "Activity Name", "Status", and "Target Date".

At the bottom of the form are three buttons: "Save", "Save and Close", and "Close".

Add a Non-Competency-Based Goal (cont.)

Add the Goal Name and the Goal Description:

- **Goal Name** is the name you choose to give this goal.
- **Goal Description** should be SMART.
 - Specific
 - Measureable
 - Aggressive yet Achievable
 - Results-Oriented
 - Time-Based

Add Goal ✕

My IDP (Development) Goal Wizard  Goal Notes

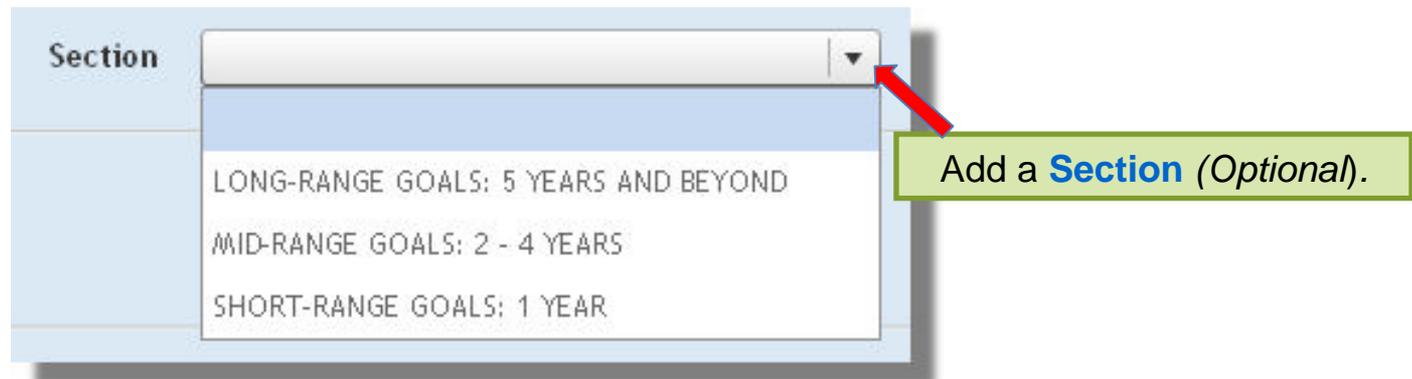
Goal Name * Goal Name is a required field.

Description Description should be SMART.



Add a Non-Competency-Based Goal (cont.)

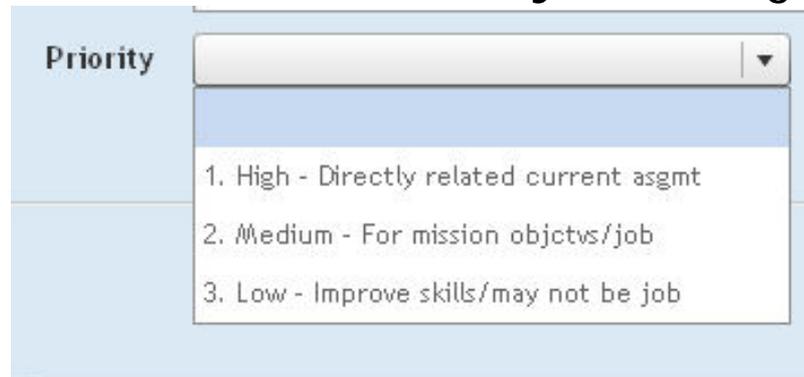
You can create Short-, Mid-, or Long-Range goals, though you are not required to have all three in your plan:



- **Short-Range** - Goal you plan to achieve *within the next year*
 - Often focus on development related to your current job assignment or technical/job specific skills needed now.
- **Mid-Range** - Goal you intend to achieve in *2-4 years*
 - Often development objectives important for growth within your present position or for developing a new skill or area of knowledge.
- **Long-Range** - Goal you wish to achieve in *5 years and beyond*
 - Often development goals that reflect career aspirations, taking on greater responsibility, or moving to a new area of work.

Add a Non-Competency-Based Goal (cont.)

You are also able to add the Priority for this goal:



A screenshot of a web form showing a dropdown menu for 'Priority'. The dropdown is open, displaying three options:

- 1. High - Directly related current asgmt
- 2. Medium - For mission objctvs/job
- 3. Low - Improve skills/may not be job

Select a **Priority** (Optional).

- 1 - High** - Development necessary and directly linked to job assignments, job-specific skill sets, and will likely lead to improved job performance and ability to accomplish mission objectives.
- 2 - Medium** - Necessary to accomplish organization strategic goals and objectives, not directly needed to perform job responsibilities, but would improve and enhance job performance.
- 3 - Low** - The development activity supports goals not directly related to your current job description, but will appreciably improve your skill set.

Add a Non-Competency-Based Goal (cont.)

Finally, select your Target Date:

- **Target Date** is the date by which you want to achieve the goal (typically the end of the plan period).

Target Date * 8/24/2012

Section SHORT-RANGE GOALS: 1 YEAR

August 2012

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Set a **Target Date**, considering the **Section** selected.

Add a Non-Competency-Based Goal (cont.)

- Let us summarize the required fields of our goal:
 - Goal Name
 - Target Date
- It is suggested that you include a SMART description.

When complete, click **Save and Close**.

Add a Non-Competency-Based Goal (cont.)

You have now completed the addition of a non-competency-based goal.

Select IDP: My IDP (Draft)
 Edit Display

[Submit for Approval](#)
 Changes to the IDP requires approval
[Hide IDP Details](#)

Create IDP
Create Goals
Submit for Approval

Status: Draft

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (2 Year)) 5/1/2012 to 4/30/2014

Edit IDP

[Add/Edit IDP Notes](#)

[Add Goal](#)

[Print IDP](#)

[View Changes Log](#)

[Delete IDP](#)

Goal Name	IDP Name	IDP Status	Target Date	Goal Status
Develop People Manage...	My IDP	Draft	6/28/2013	No Value

External Activities



Add an External Activity

- SATERN catalog items are an effective way to build skills, but there are many other options available, including, but not limited to, academic courses, professional conferences, and seminars.
- In order to add non-SATERN-based development activities to your plan, you will add **External Activities**. In the next several slides you will learn how to add such external activities to your plan.

Add an External Activity (cont.)

- Return to the goal you have just created.
- Click on the **Goal Name** to open the goal for editing.

Select IDP: My IDP (Draft) ▼

Submit for Approval ⚠ Changes to the IDP requires approval

Create IDP >>> Create Goals >>>

Status: Draft

IDP Type: Development

Description:

IDP Period: (Performance Year 2013 (1 Year)) 5/1/2012 to 4/30/2013

Goal Name	IDP Name
 Systems Engineering	My IDP

Click the **Goal Name**.

Add an External Activity (cont.)

From the Edit Goal screen, click the **Create New Activity** drop down box and choose **Create External Activity**.

The screenshot shows the 'Edit Goal' interface for 'My IDP (Development)'. The goal name is 'Systems Engineering'. The description field is empty. The priority is set to a dropdown menu. The start date is empty, and the target date is '8/24/2012'. The section is set to a dropdown menu. At the bottom, there is a table with columns 'Activity Name' and 'Status'. A dropdown menu labeled 'Create New Activity' is open, and the option 'Create External Activity' is highlighted with a red circle. A green callout box points to this option with the text 'Choose Create External Activity.'

Activity Name	Status

Add an External Activity (cont.)

For an external activity, there are two required fields:

- **Activity Name** should describe the activity in enough detail for a reviewer to understand.
- **Target Date** is the date by which you want to achieve the activity.

Activity Notes

Activity Name * Job Aid Creation

Activity Type External

Target Date * 8/24/2012

Activity Status Select Status

Target Actual

Activity Status, Target and Actual fields are optional.

Once complete click Save.

Save Cancel

Add an External Activity (cont.)

You have now completed the addition of an External Activity.

Goal Name * Systems Engineering

Description

Priority Start Date Target Date * 8/24/2012

Section

Activities

Activity Name	Status	Target Date
Job Aid Creation	Not Started	8/24/2012
NPR 7123.1A NASA SYSTEMS ENGINEERING PROCE...	Must be registered	8/24/2012

Click **Save and Close**

Add an External Activity (cont.)

Let us quickly review:

- You selected **Create New Activity** to create a External development activity.
- You entered the *required* development activity details required by the IDP tool:
 - Activity Name
 - Target Date

IDP Flow Chart

