

# Editing Learning Plans

## The Rules

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Learning Plans are simple to set up and edit, but it is important to keep in mind a few rules so that your editing does not result in unintended consequences.

### THE FIRST RULE OF EDITING LEARNING PLANS:

**Once a User completes a Learning Plan, they retain that completion.\***

Retiring / editing a Learning Plan or unsubscribing a User from a Learning Plan does NOT negate the completion, and these results will be visible in all Learning Plan reports and User Listing records.

**\*Unless a Course is added to a Fixed Date Learning Plan prior to the Due Date – in that case, all associated Users will be required to complete the added Course.**

### THE SECOND RULE OF EDITING LEARNING PLANS:

**Fixed Date Learning Plans are forgiving, *Relative Date Learning Plans are not.***

Fixed Date Learning Plans can be edited quickly and easily with minimal considerations.

*Editing the date, time or Course on a Relative Date Learning Plan forces the original plan into retirement, and a new, edited Learning Plan is created.*

**New to Learning Plans? Start with Fixed Date Learning Plans. And don't forget the First Rule!**

### THE THIRD RULE OF EDITING LEARNING PLANS:

**Retired Learning Plans stay retired.**

Once retired, Learning Plans can no longer be edited and are never deleted. Make sure that you have made any necessary edits to a Learning Plan prior to retiring it.

**Consider carefully the timing of Learning Plan retirement.**

### THE FOURTH RULE OF EDITING LEARNING PLANS:

**Know your reporting goals beforehand and partner with Alchemy to get the best results!**

We want your Learning Plans to be successful and sustainable, enabling you to quickly access the training information you need with minimal maintenance. Let your Alchemy contact know the results that you wish to achieve with your Learning Plan edits, and we will gladly assist you towards scalable solutions!

**Questions? Contact Alchemy Support at 1-888-988-8832 or [support@alchemysystems.com](mailto:support@alchemysystems.com).**

*Please see the following pages for a list of typical desired outcomes and items to consider when editing Learning Plans.*

# Editing Learning Plans

## General Considerations

Desired Outcome	Considerations
Quick, accurate reports	<p>S.M.A.R.T.* goals and a well-managed User Listing make for clear Learning Plans and quick, accurate reporting.</p> <p>*Specific, Measurable, Attainable, Relevant and Time-Bound</p>
Retire a Learning Plan	<p>Learning Plans are never deleted, and cannot be brought out of retirement for additional editing. They can, however, be copied and edited as a new Learning Plan.</p>
Remove a Learning Plan and any associated reporting	<p><b>First unsubscribe all Users, THEN retire the Learning Plan.</b></p> <p>The Learning Plan will still show up in lists and reports with the Show Retired option enabled, but no results will be reported... unless someone has completed the Learning Plan (Rule #1).</p>
Edit a Learning Plan name	<p>The name change will be reflected throughout all reporting, past and present. XLS-Refresh reports will need to be re-run from Manager.</p>
Add or remove Users from a Learning Plan with a <u>Manual Subscription</u>	<p>This can be done in the Subscription tab, and will not cause any Learning Plans to retire.</p>
Add or remove Users from a Learning Plan with an <u>Automatic Subscription</u>	<p>Automatic Subscriptions are managed by Group or Worksite association, so to change the Learning Plan subscription, you must change the individual's association to the subscribed Group or Worksite.</p> <p>Any User who has completed a Learning Plan will retain that completion, regardless of Group association (Rule #1).</p>
Make minor edits to a Company Specific Course that is on a Learning Plan	<p>Best Practice: Make editorial changes to the file and upload the corrected file to the Course.</p> <p>No adjustments need to be made on the Learning Plan, but keep in mind that Users who took and passed the original Course will retain that credit on the Learning Plan (Rule #1).</p>
Make major edits / regulation changes to a Company Specific Course that is on a Learning Plan	<p>Best Practice: Archive the original Course and create a new Course with the updated content. Edit or rebuild the Learning Plan based on whether or not any of your Users completed the original plan.</p> <p><b>Where possible, avoid major Course changes midway through a Learning Plan.</b></p>
Add an equivalent / translated version of a Company Specific Course that is on a Learning Plan	<p>Best Practice: Create the additional Courses as necessary, and use the Parent / Child feature to link the translations to the original Course.</p> <p>The Learning Plan will not need to be edited, and credit will be given on the Learning Plan for whichever child of the Course was taken.</p>

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## Relative Date Considerations

Desired Outcome	Considerations
Run an XLS Refresh report on an edited <u>Relative Date</u> Learning Plan	Since most edits to Relative Date Learning Plans cause the original plan to retire, you will generally need to re-run any XLS-Refresh reports based on that Learning Plan.
Make Course selection changes to a <u>Relative Date</u> Learning Plan	<p>The initial Learning Plan is retired behind the scenes, and a new, edited Learning Plan is created with the remaining Users who did not complete the original Learning Plan (Rule #3).</p> <p>Users who completed the original Learning Plan will retain their completion and will NOT be associated to the new Learning Plan (Rule # 1).</p> <p>Both the retired and the active Learning Plans will be available for reporting. XLS-Refresh reports will need to be re-run from Manager.</p>
Make Completion Window changes to a <u>Relative Date</u> Learning Plan	All of the above; the start date remains the same as the original Learning Plan.
Edit an individual's due date on any <u>Relative Date</u> Learning Plan	<p>If you are not extending the Completion Window, then you will need to edit the Start Date for the individual in the All Subscriptions tab</p> <p><b>Make sure that the new Start Date does not exclude training that occurred in the original time frame!</b></p> <p>If you need to make this change for a number of Users, consider retiring this Learning Plan and starting over with a Fixed Date Learning Plan (Rule # 2).</p>
Make Course or Completion Window changes to a <u>Repeating Relative Date</u> Learning Plan	You must retire and copy the Learning Plan to make this adjustment (Rule #2). Don't forget to re-subscribe your Users!
Make a <u>Relative Date</u> Learning Plan into a Repeating Learning Plan	This option is not available. You will need to start with a new Repeating Relative Date Learning Plan.
Stop the repeating cycle of a <u>Repeating Relative Date</u> Learning Plan	You cannot stop the repeating cycle; however, you can retire the Repeating Learning Plan and start over with a new Relative Date Learning Plan.
Make Subscription Changes on any <u>Relative Date</u> Learning Plan	<p><b>Unsubscribing and re-subscribing the same Users on a Relative Date Learning Plan will restart the Completion Window. Any courses taken prior to the new Start Date will not be credited on the plan.</b></p> <p>Users who have completed the Learning Plan will not be affected by these changes and will retain their completion (Rule #1).</p>

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## Fixed Date Considerations

Desired Outcome	Considerations
<b>Make Course selection changes to a <u>Fixed Date</u> Learning Plan</b>	These changes are generally straightforward. If another Course is added prior to the due date of the Learning Plan, all Users – including those who completed the original plan – will be required to complete the added Course.
<b>Make date-time changes to a <u>Fixed Date</u> Learning Plan</b>	<b>Make sure that the date-time edits do not exclude training that occurred in the original time frame.</b>
<b>Add the Repeating function to a <u>Fixed Date</u> Learning Plan</b>	This edit can be made within the Learning Plan, but cannot be undone.
<b>Stop the repeating cycle of a <u>Repeating Fixed Date</u> Learning Plan</b>	You cannot stop the repeating cycle; however, you can retire (and copy, if necessary) the Learning Plan.
<b>Make additional Subscription Changes on any <u>Fixed Date</u> Learning Plan</b>	Subscription changes (example: switching from Manual to Automatic, or vice-versa) can be made within the subscription tabs.  Subscription changes will not affect any User that has completed the Learning Plan.