

Creating a Training Plan on eDoc

When do I need to complete a Training Plan?

All PGRs should complete an initial Training Plan (TP) in the first few months of starting a PhD, before the Programme Approval is submitted (three months for full-time PGRs, six months for part-time PGRs). After that, a new Training Plan should be completed annually, in advance of each Annual Progress Review.

How do I create a Training Plan?

Before starting your Training Plan, you should undertake a Training Needs Analysis (TNA), to identify your training and development priorities. You can use the interactive TNA function on eDoc to do this (see the guide on '[Using eDoc for a Training Needs Analysis](#)').

You can find the Training Plan function on the bottom right-hand corner of your project page on eDoc:

The screenshot shows a project page on eDoc. On the left, there are fields for 'Mode' (Full Time), 'Registered degree' (PhD), 'Collaborating Establishment' (LFC), 'Faculty' (Science and Technology), and 'Department' (Engineering). Below these is a table with columns 'Date completed', 'Deadline', and 'Reminder sent'. The table contains three rows: 'Project start' (07 Apr 2023), 'Programme approval, submission' (07 Jul 2023, 07 Jun 2023), and 'Project end' (07 Apr 2027). To the right of the table is a vertical list of buttons: 'Programme approval', 'Confirmation of registration', 'Annual progress review', 'Examinations', 'Ethics', 'Request a change', 'Collaborating establishments (if applicable)', and 'Recording Short Term Absence'. Below these is a section titled 'RESEARCHER DEVELOPMENT' containing buttons for 'Training Needs Analysis', 'Training Plan', and 'Training Record'. A blue arrow points from this section to a larger box on the right that lists 'RESEARCHER DEVELOPMENT' followed by 'Training Needs Analysis', 'Training Plan', and 'Training Record'.

Select 'Add plan' to create a new TP, and then 'continue':

The screenshot shows a navigation bar with three buttons: 'Training Needs Analysis', 'Training Plan', and 'Training Record'. Below the navigation bar are three buttons: 'My priorities', 'My plan', and 'My objectives'. In the bottom right corner, there is a button labeled 'Add plan...' which is circled in red.

Training Needs Analysis ▶ **Training Plan** ▶ Training Record

My priorities | My plan | My objectives

You are creating a new training plan for current academic year.

Please note that you should create ONLY ONE training plan per academic year.

Cancel **Continue**

You can now start adding objectives:

Training plan -- 2024 - 2025 -- Mrs Candice Ashton

Training plan

| | | |
|---------------|--|---|
| Title | Training plan -- 2024 - 2025 -- Mrs Candice Ashton | STATUS Waiting for submission |
| Academic year | 2024 - 2025 | CURRENTLY WITH Candice Ashton |
| Date | 20 Sep 2024 | Add objective |
| Project | Issue and of issue party president name | Print training plan record |
| Supervisor | Prof Marquita Moran Dr Leslie Higgins | |
| Researcher | Mrs Candice Ashton | |

For each objective, you will be asked to complete the following fields, the ones marked with * are mandatory:

- Objective title*
- What skills do you already have related to this objective?
- Researcher Development Framework (RDF) skills area to develop*
- Development support identified
- What else will you need to do to achieve this objective and how will your measure your success?
- Expected completion date*

The questions are guiding you to formulate specific, measurable and timely objectives.

Objective title *

Develop a more strategic approach to identifying and managing my

What skills do you already have related to this objective?

Basic knowledge of EndNote although did not use it for masters dissertation.

RDF skills area to develop *

Information literacy and management
Remove

Information seeking
Remove

Add another

This field is pre-populated with skills from the RDF or **Researcher Development Framework** (see Appendix). If you start to type a skill it will auto-complete it. You can add multiple skills areas if relevant.

Development support identified

Training courses, etc.

Introduction to Endnote (28 Oct 2024, from 13:00 to 15:00) ▼
Remove


Strategic Literature Searching (19 Nov 2024, from 14:00 to 16:00) ▼
Remove

-- select -- ▼
Remove

Add another

Drop-down menu of forthcoming training workshops available to book via eDoc. You can choose multiple events if relevant, or you can use the free text box to describe other kinds of support or events.

Once you have completed each objective, select 'save'. You will need to repeat this for each objective you create. The number of objectives you choose to create will vary but, as a guide, somewhere between 2-5 objectives per year is reasonable.

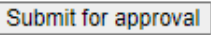
| |
|---|
| STATUS Waiting for submission |
| CURRENTLY WITH Candice Ashton |
|  Submit for approval |

 Add objective

| |
|---|
| OBJECTIVES |
| Develop a more strategic approach to identifying and managing my literature |
| Increase confidence in presenting |
| Establish a routine to manage my research time and ensure a work-life balance |

When you have added all of your objectives, follow the green button to progress your TP to the next stage.



You have chosen to submit your training plan for approval

Confirm:  Cancel

Notes (Notes can be seen by the applicant and all staff reviewing this application.)

This sends your Training Plan to your Lead Supervisor for approval.

Supervisors: you will receive an email notification to let you know that a Training Plan has been submitted for your approval. It will also be in your tasks on eDoc:

| | |
|--|---|
| Tasks | |
|  Supervision meeting | Waiting for Prof Marquita Moran to review the notes |
|  Training plan – 2023 - 2024 – Mrs Candice Ashton | Waiting for Supervisor approval |

Supervisors: you can either 'Approve' the TP or return to the PGR with notes if you have any comments. The PGR will then need to resubmit it to you.

Click on the title to read each objective in full.

What happens after I have completed my Training Plan?

Once you have submitted your Training Plan and your Lead Supervisor has approved it, you just need to mark your objectives as 'complete' when applicable. To do this, select the 'My objectives' tab under your Training Plan:

Click on the title of the objective, and then fill in the 'completed' field with a date. Alternatively, you can tick the 'no longer relevant' box, and then press submit:

Development support identified

What else will you need to do to achieve this objective and how will you measure your success?

Expected completion date
25 Apr 2024

No longer relevant

Completed

Then select 'Submit'.

Once completed, this will show up on the objectives tab on your Training Plan, and also on your Training Record:

| Training Needs Analysis | | Training Plan | | Training Record | |
|---|---|---------------|-----------------|-----------------|--|
| My priorities | | My plan | | My objectives | |
| ◀ 2023 - 2024 ▶ | | | | | |
| Objective | Skills covered | Status | Completion date | | |
| Develop a more strategic approach to identifying and managing my literature | Information seeking, Information literacy and management | In progress | | | |
| Increase confidence in presenting | Self-confidence, Communication methods, Communication media | In progress | | | |
| Establish a routine to manage my research time and ensure a work-life balance | Time management, Work-life balance | Completed | 17 Sep 2024 | | |

| Training Needs Analysis | | Training Plan | | Training Record | | |
|--|--|-----------------|--|-------------------|--------------------------|--|
| Display of overall log of training activity. | | | | | | |
| My training record | | Upcoming events | | Attendance record | | |
| Add other activity... | | | | | | |
| Download development log: with notes <input type="checkbox"/> for year All <input type="button" value="Download"/> ◀ 2024 - 2025 ▶ | | | | | | |
| 17 Sep 2024 | Objective completed: Establish a routine to manage my research time and ensure a work-life balance Skills: Time management, Work-life balance | | | | Add note | |

Please note that once a Plan has been approved and your objectives are in progress, you won't be able to add any additional objectives. You will need to create an additional plan for the year or include them in the following year's Training Plan.

Appendix: The Researcher Development Framework

When filling in your Training Plan objectives, you need to link them to one of the descriptors from the Researcher Development Framework (RDF). Each objective asks you for the RDF skills area that you want to develop, and the field is pre-populated with the skills descriptors from the outer circle of the Framework.

