Genesys Skills Assessor 8.1.127

Administrator Guide

About Genesys

Genesys is the world's leading provider of customer service and contact software - with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service - and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesys.com for more information.

Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc. cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the ***Genesys Licensing Guide*****.**

Released by: Genesys Telecommunications Laboratories, Inc. http://www.genesys.com/

Document Version: 81skillsassessor_administrator_03-2014_v8.1.103.00

Table of Contents

Preface

Welcome to the *Genesys Skills Assessor 8.1.127 Administrator Guide*. This User Guide has been designed to walk the user through how to use and navigate the Skills Assessor application.

This document is valid only for the 8.1.127 release of this product.

Note:	For versions of this document created for other releases of this product, visit the Genesys documentation website

About Genesys Skills Assessor

Genesys Skills Assessor allows companies to use a combination of online tests, self-assessment, and observational feedback to assess the level of agent skills across their contact center. Agent skill levels are stored in a central skills database and can be combined with performance data from legacy systems—for example, CRM sales data and Learning Management System courses.

Centralizing agent skills information allows contact centers to build a “DNA profile” of skills for each agent to identify:

- What are the “must have” and “nice to have” skills for each job type?
- Who really knows what across the contact center?
- Who has what skills and skill levels?
- Who requires what type of training, and when?

Skillsroute enables companies to create and manage multiple agents, skills, and skill levels in Configuration Manager. Skill assessment results exported directly from Skills Assessor can be used to optimize multi-skilling and call routing, to ensure that the customer is always presented to the most knowledgeable agent available.

Intended Audience

This document is primarily intended for system administrators or other individuals who install Genesys Skills Assessor.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to Techpubs.webadmin@genesys.com.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, see the Contact Information on the Customer Care website. Before contacting technical support, refer to the *Genesys Care Program Guide* for complete contact information and procedures.

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

- The *Framework 8.0 Configuration Manager Help*, which will help when using Configuration Manager.
- The Release Notes, Product Advisories, and all technical documentation for this product, which are available on the Genesys Documentation website at http://docs.genesys.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthand for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

`81skillsassessor_user_08-2013_v8.1.101.00`

You will need this number when you are talking with Genesys Technical Support about this product.

Type Styles

The Type Styles table describes and illustrates the type conventions that are used in this document.

Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories,	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula.

	files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host <confighost>`

Chapter

1 Administrator Guide

Overview

This Administrator Guide will walk you through how to administer Skills Assessor from building the hierarchy to creating assessments and viewing the results.

Logging On

When you first access the application you will either be presented with a screen similar to the one below (the format of the actual screen will depend on whether this has been customized) or access the application directly through an internal link.

Enter the unique log on and password and click on **Continue**.

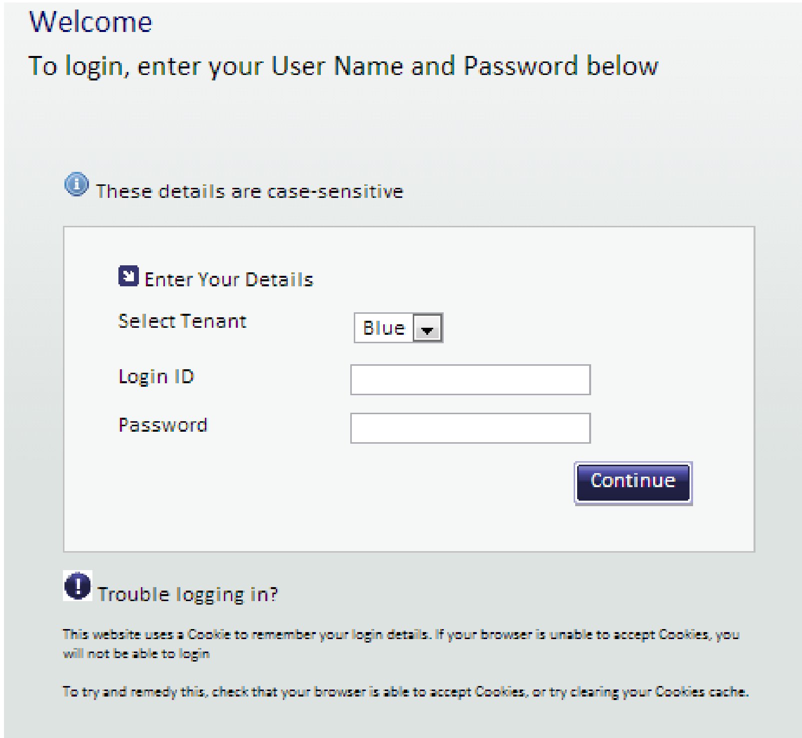


Figure 1: Log on Screen

An Administrator usually has full access to Skills Assessor which could also include user (or agent) permissions, as per the example below.

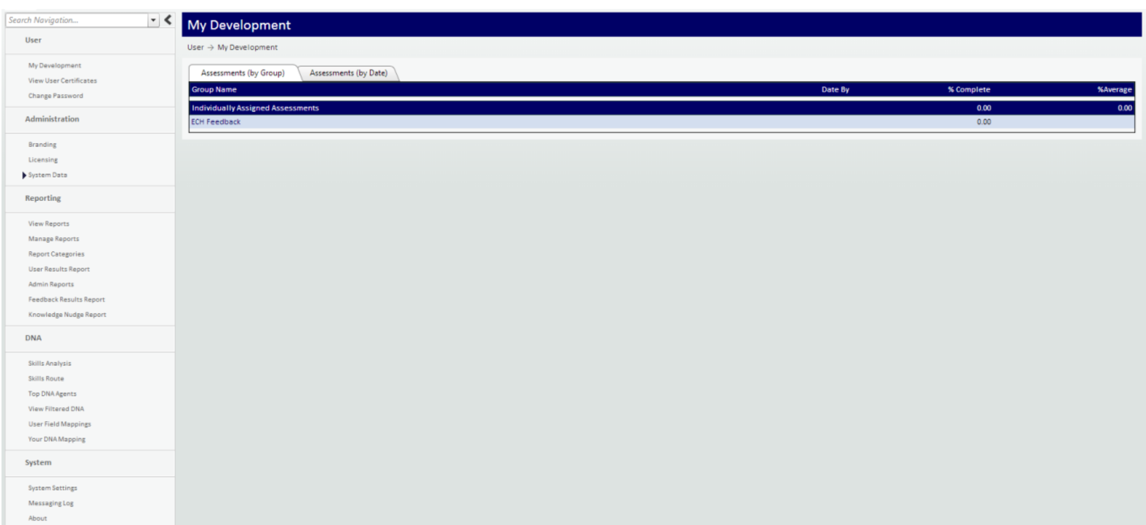


Figure 2: Skills Assessor Home Page

The left side of the screen includes an expandable navigation menu. In the above example the My Development page is displayed.

Manage Hierarchy

If the hierarchy is maintained through integration into a HR system or by importing data, there will be no requirement to manually make any changes as this will be managed automatically.

Select the `Users & Hierarchy` option to create and manage the hierarchy. The hierarchy structure automatically gives visibility of any subordinate assessment results in the Report page.

The top position in the hierarchy cannot be deleted, however additional positions can be created and inserted into the hierarchy by right clicking and creating a new position and then dragging it to under the existing position in the hierarchy.

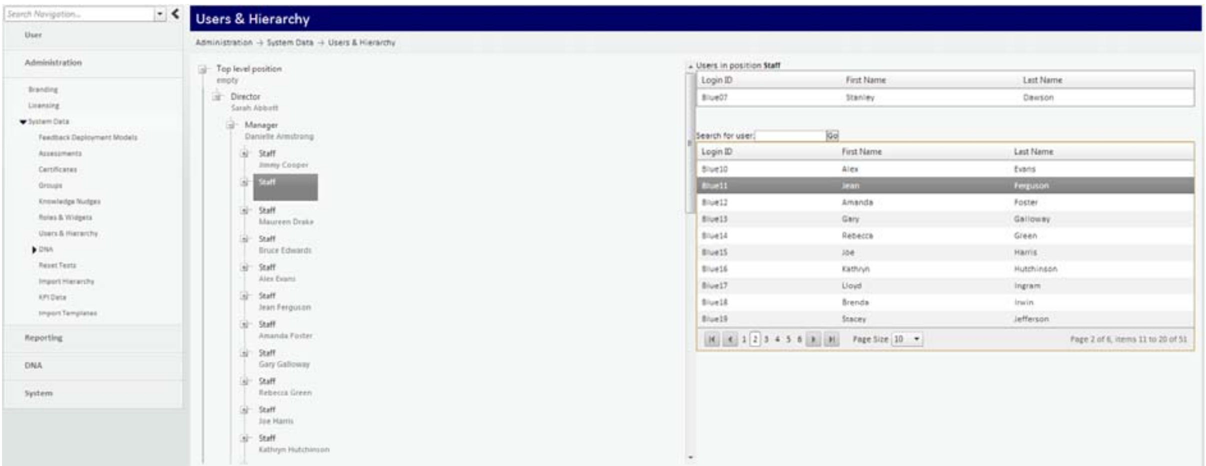


Figure 3: Hierarchy Management

To create a new position, right click on a position in the hierarchy and select `New Position`.

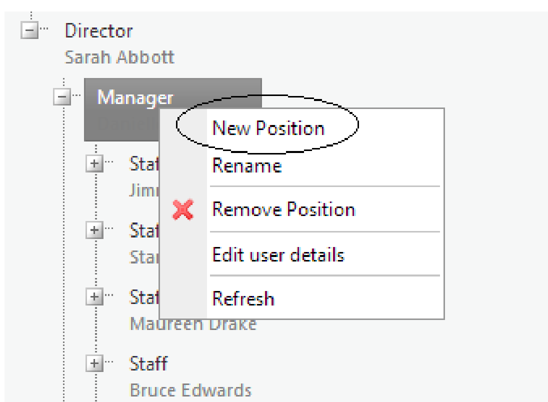


Figure 4: Creating a New Position

The position will then appear in the hierarchy.

Right click on the new position and the option is then available to rename it.

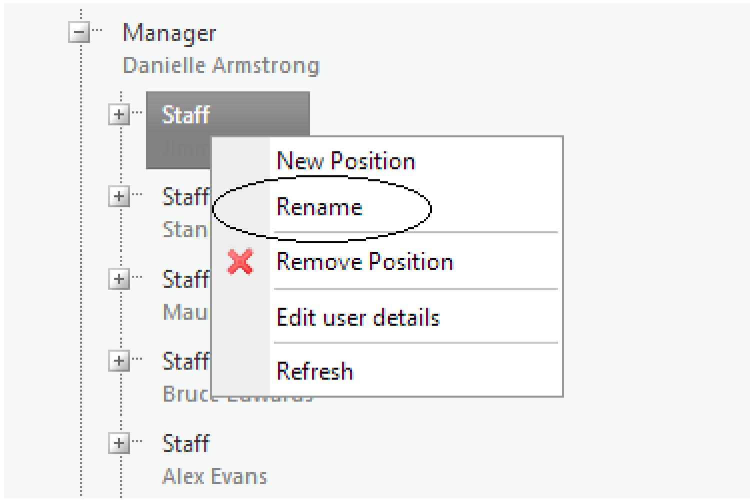


Figure 5: Renaming a Position

To assign a user to the new position first highlight the position and then right click on the user selecting `Add to position`. This will assign the individual to the new position.

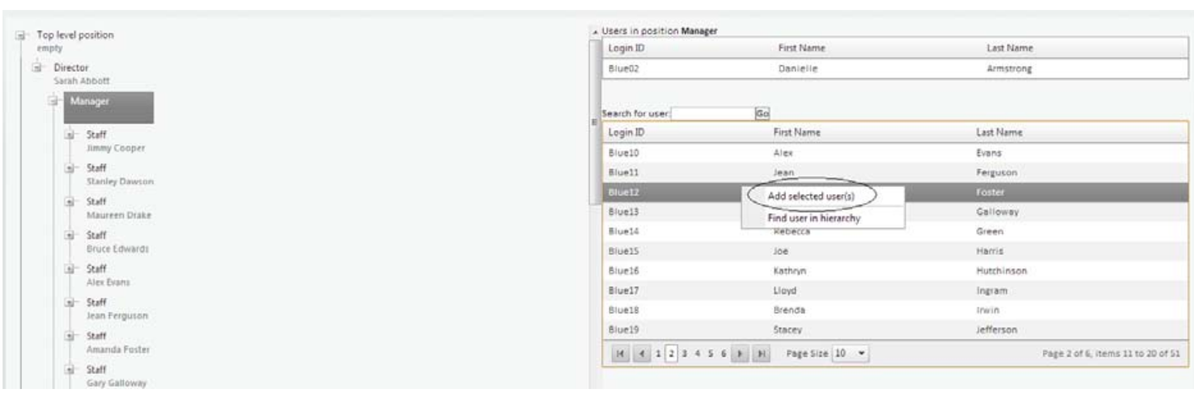


Figure 6: Assigning a User to a Position

The hierarchy is usually created prior to receiving the application; however this will have to be maintained.

To manually maintain the hierarchy:

1. Create new users manually (see next page for instructions) and then assign them to the relevant position.
2. Amend any position changes manually and then the users assigned to the positions.

See hierarchy import functionality for information on how to maintain the hierarchy by importing hierarchy data from a file.

It is also possible to automatically maintain the hierarchy from a HR import – this would need to be discussed separately.

Creating and Managing Users

If the hierarchy is maintained through integration into a HR system or by importing data, there will be no requirement to manually make any changes as this will be managed automatically.

There are two options when creating a new user. If creating a new user to assign to a new position, then first create the new position and then right click and select `Edit user details`. This will allow you to create a new user and automatically assign them to the position.

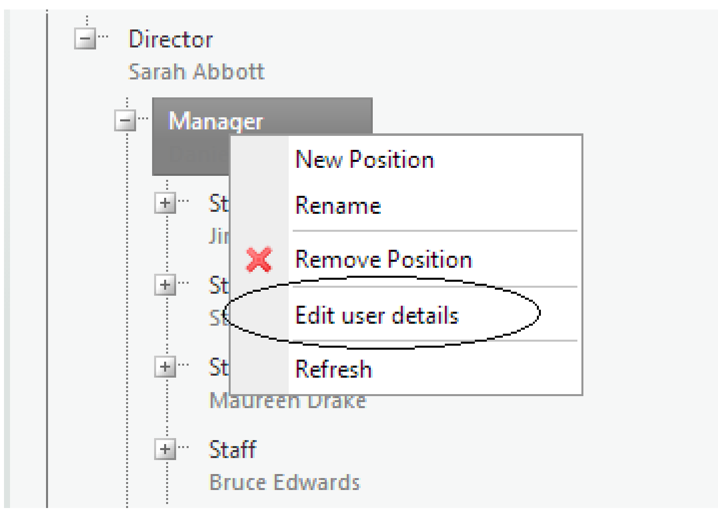


Figure 7: Assigning a User to a Position by Editing User Details

If creating new users only, then right click on the unassigned user's position and select `Edit user details`.

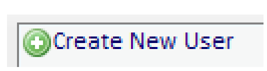


Figure 8: Creating new Unassigned Users

A template will be presented as per the example below.

Enter the information as required and select `Create` to save the new user details.

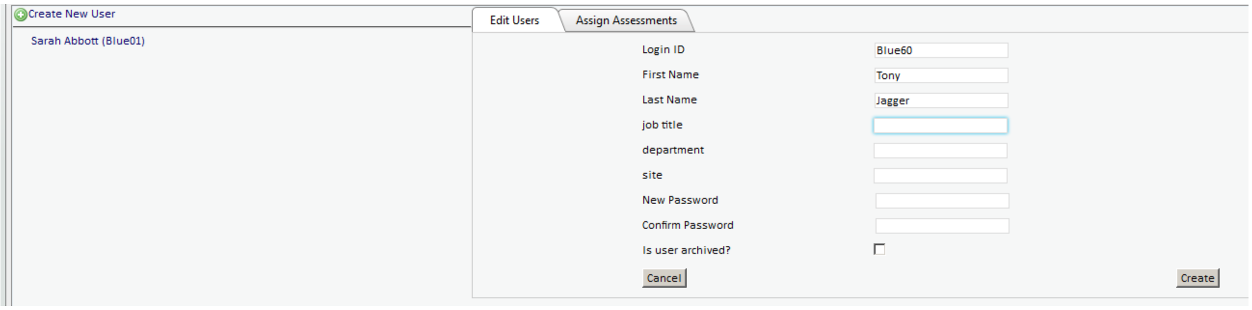


Figure 9: Entering New User Details

The newly created user will then be assigned to the position or visible within the unassigned user list.

Hierarchy Import Functionality

Organizations can import their organization hierarchy directly into Skills Assessor using the `Import Hierarchy` page.

First select the file that contains your Hierarchy information. This should be in either a .csv or .xls file. ***Please note that .xlsx is not supported by the application*.**

The example hierarchy below includes KPI data for use in correlation analysis and DNA. Including this data as part of the import will not cause any issues.

Tony Price is the manager at the top level.

Firstname	Surname	Employee number	Manager	Position	Region	Location	Team	Company	Date	Product Knowledge (Assessment)	Agent Attitude	Customer Info Fit	Identify Problem&Soln
Misti	Pivero	mpivero	owilson	Agent	Liverpool	Merseyside	Team 2	My Company	01/11/2011	10	3	6	4
Cassandra	Poorman	cpoorman	owilson	Agent	Liverpool	Merseyside	Team 2	My Company	01/11/2011	2	8	2	3
La Tasha	Porras	lporras	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	3	5	9	6
Megan	Powell 111	mpowell	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	4	8	2	3
Romana	Privett	rprivett	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	4	3	6	1
Debra	Proctor	dproctor	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	5	9	1	5
William	Radosevic	wradosevic	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	8	7	9	7
Fertisha	Ramero	framero	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	1	1	1	5
Lydia	Ramirez	lramirez	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	4	1	2	3
Crystal	Ramos	cramos	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	3	1	5	3
Lori	Wang	lwang	owilson	Agent	Liverpool	Cressington Park	Team 2	My Company	01/11/2011	10	1	6	3
Owen	wilson	owilson	tprice	manager	Liverpool	Cressington Park	Team2	My Company	01/11/2011				
Cath	white	cwhite	tprice	manager	Liverpool	Merseyside	Team1	My Company	01/11/2011				
Lisa	spencer	lspencer	tprice	manager	Manchester	Deansgate	Team2	My Company	01/11/2011				
Ann	talbot	atalbot	tprice	manager	Manchester	Worsley	Team1	My Company	01/11/2011				
Tony	Price	tprice		manager	Manchester	Worsley		My Company	01/11/2011				
Kathy	Gurin	kgurin	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	8	10	7
Loretta	Hammond	lhammind	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	10	1	5
Louise	Jacobs	ljacobs	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	7	8	9
Amy	Jay	ajay	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1	2	6
Ian	Johnson	ijohnson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	2	4
Gurutej	Kaur	gkaur	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	3	6	3	3
Ann	Larson	alarson	atalbot	Agent	Manchester	Deansgate	Team 1	My Company	01/11/2011	9	4	9	8
Kai	Lemieux	klemieux	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	4	3	6	10
Kim	Lewis	klewis	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	6	6	5	3
Ben	Lin	blin	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	1	3	7	10
Pele	Lolani	plolani	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	2	10	4	3
Rebecca	Lorraine	rlorraine	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	9	9	6	6

Figure 10: Importing Users from Spreadsheet or CSV Files

Use the Browse…option to select the required file and then click on `Upload File`.

Once the file has been uploaded, map the user fields to those required by selecting the relevant fields from the drop down menus**.**

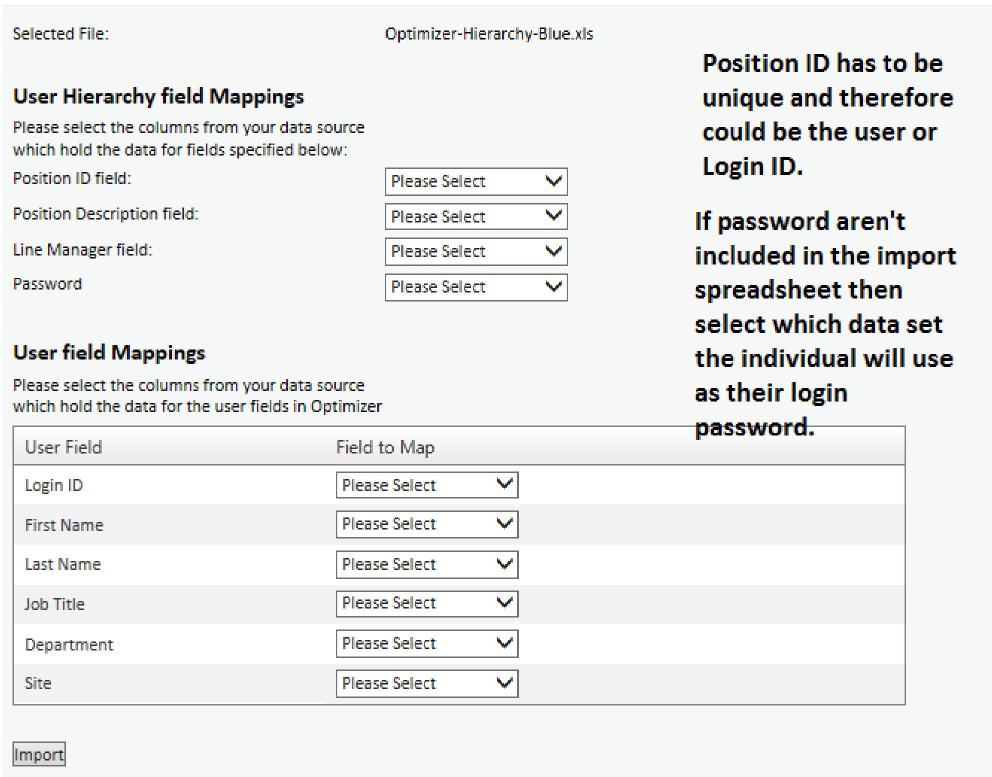


Figure 11: Mapping User Position Fields

When you are happy with your selections click the import button. The import process will then begin and you can monitor its progress. Upon completion the status will change to Complete.

The hierarchy can now be amended, if required within the `Users & Hierarchy` page.

As part of the import process individuals will automatically be assigned to User Roles (see Roles & Widgets). Any individual who has a subordinate will also be assigned to a Manager Role.

Managing User Permissions

User permissions and therefore what functionality the user has access to, is defined in the `Roles & Widgets` page.

In the example below there are four default Roles (if the Organization hierarchy is maintained using the import hierarchy page, than any users with subordinates will automatically be assigned to both the Manager and User Roles.

The number of users and pages associated to the Role is visible under `User Count` and `Widget Count`.

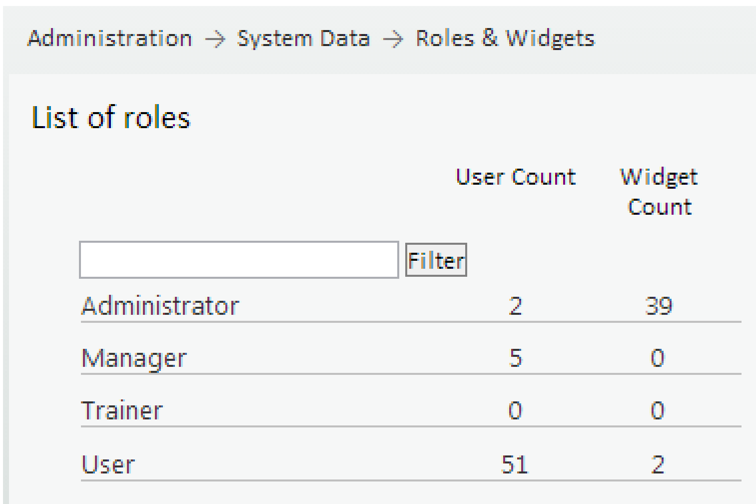


Figure 12: Managing User Permissions

Defining, Creating, and Managing Roles

The next pages will demonstrate how to create and manage the Manager role, which is the same for each role.

Select an individual Role to view any associated users and their details will appear in the `Users in role` box.

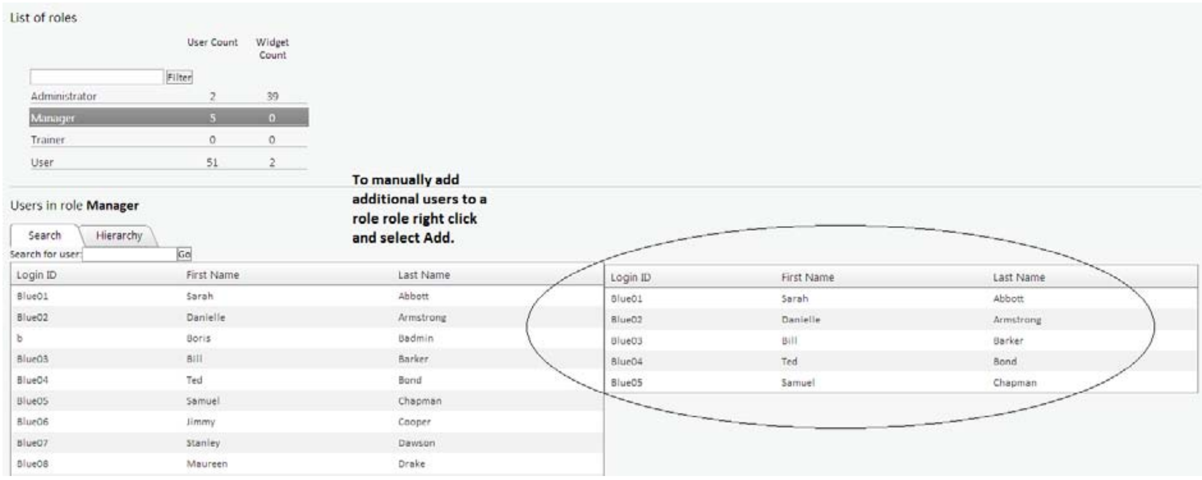


Figure 13: Viewing Users with a Specific Role

Additional users can be assigned to the Role by clicking on the individual in the user selection window and then right click and select `Add selected user(s).` Once the user has been selected they will appear in the `Users in role` window.

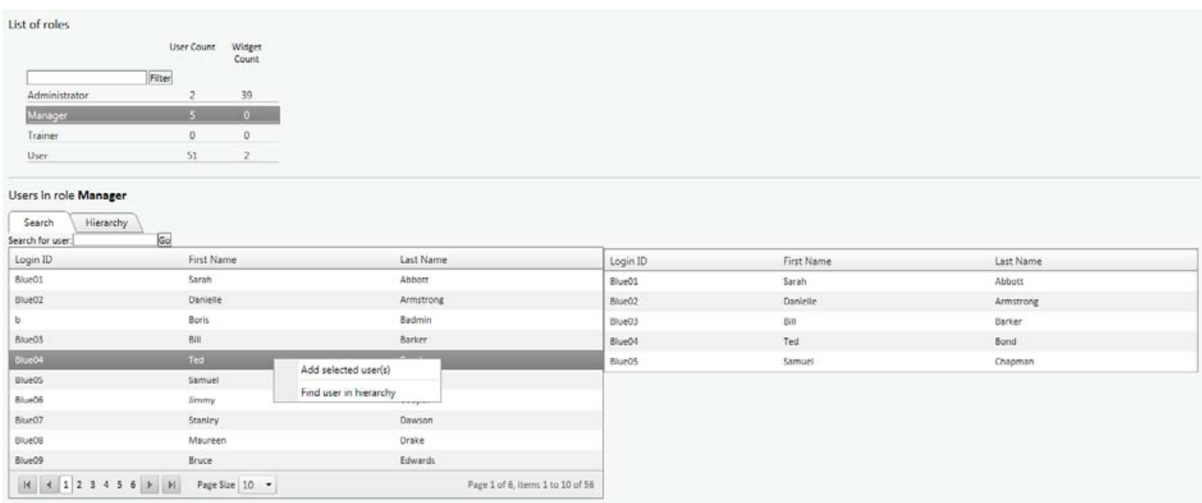


Figure 14: Assigning Additional Users to a Role

There is also a search facility to quickly select the individual rather than having to go through each page to find them manually.

Enter the name of the individual to be selected in the search box and then click on `Go`.

Figure 15: Searching for Users

A list of possible individuals will then be presented to select from.

There is also the option to search for an individual user in the organization hierarchy. Right click on the individual in the bottom window and select `Find user in hierarchy`.

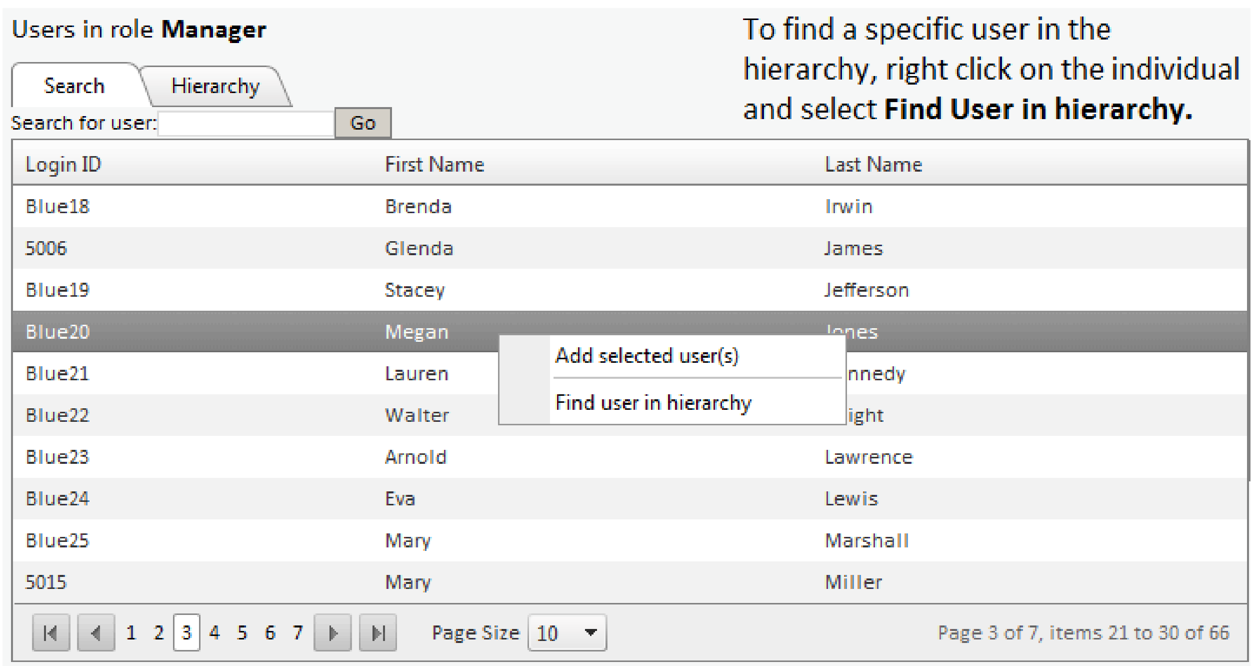


Figure 16: Finding a User in the Hierarchy

Where the individual is situated within the organization hierarchy is presented in the bottom right hand side window as per the example below.

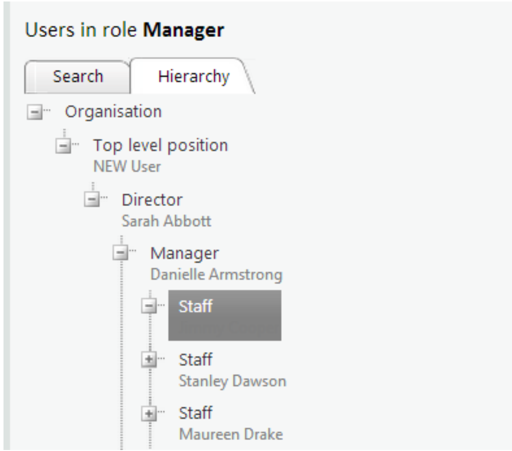


Figure 17: Search Results

Creating Templates Associated to Roles

To create a template for individual Roles you first need to understand which pages are available and their functionality:

Pages

The following pages are available:

- **About** – Displays the about screen for the application.
- **Admin Reports** – There are 3 administrator reports currently available:
    - User Result Detail – this will report the user results by assessment down to question level with the option to export the information.
    - User Feedback Response Percentages – this will report the percentage of users who selected which criteria
    - Question Response Summary – gives an overall summary by assessment at question or criteria level, of what percentage of users selected which answer or rating
- **Branding –** used to change the branding on the application e.g. color and logo.
- **User Field Mapping** – Map user fields to DNA filters.
- **Feedback Deployment Model –** this allows feedback models to be created, for example, **Self & Manager, Self, Manager & Peers** and so on. A feedback assessment is created using one of the feedback models once it has been assigned to a user and it will automatically assign the assessment to the **model** such as manager or peer.
- **Feedback Results Report –** this report displays how individuals or combination, (manager and individual) have rated themselves against specific criteria.

- **Import Users –** Import user details and Organization structure.
- **Manage KPI Data –**Manage KPI data to be used within SkillsDNA and SkillsAnalysis.
- **Job Role Mapping –** Map agents to SkillsDNA Job Roles.
- **Knowledge Nudge Report –** this reports on the time and usage of Knowledge Nudges. Knowledge Nudges are reading material associated to specific assessments and a user has to access the Knowledge Nudge before taking the assessment.
- **Licensing –** gives visibility of the license information which includes the number of licences and the expiry date.
- **Assessments –** this is where the assessments are created.
- **Certificates –** create certificates to attach to assessments.
- **Blocks –** Create and edit SkillsDNA blocks, representing Job Roles or components of those roles.
- **Components –** Create and manage DNA Components.
- **Groups –** Groups are created in Skills Assessor for the purpose of managing which assessments specific groups of users are required to take.
- **Roles and Widgets –**This page is similar to security permissions. Depending on the role and the pages associated to that role, will define what a user has access to.
- **System Settings –** This page is used to create the user fields for all users, such as first name and surname. It also defines the field mappings (what the system will expect the user to login with) and manage additional non-standard pages.
- **Users & Hierarchy –** used to define the structure within the organization e.g. positions and associated users. The hierarchy defines who has what reporting visibility.
- **My Development –** this gives visibility and access to any assigned assessments.
- **Reset Tests –** Reset User Tests.
- **Skills Analysis –** allows correlation analysis using imported data and assessment results to identify what skills are driving performance. Select the **Widget** tab to display the functionality or pages associated to the role.
- **SkillsRoute –** Transfer agent and associated skills data to Genesys from an excel spreadsheet file.
- **Top DNA Agents –** Show the top agents and compare one agent against another.
- **Update Routing Skills–** Link routing Skills to DNA, to allow updating of Skill data from calculated DNA values.
- **DNA Cube –** Process and update the data in the DNA Data Warehouse.
- **User Results Report –** allows access to users' assessment results at an individual level, or at manager level the ability to view team results.
- **View Filtered DNA –** View DNA across your organization, filtered in various ways.
- **My Certificates –** View and print your completed certificates.
- **My DNA Mapping –** Show the DNA mappings for the current user.
- **Messaging Log –** Shows logs produced by the Skills Assessor Email Notification Service
- **Trend Graph –** Shows changes in individual/team DNA data

- **Change Password** – Change your password
- **Learning Items** – Create edit and link Learning items
- **Manage Import templates** – Manage the list of import templates used for importing KPI data
- **Manage Knowledge Nudges** – Create and manage knowledge nudges
- **Manage Reports** – Upload, edit and delete Crystal reports
- **Report Categories** – Manage Crystal report categories
- **User Selections** – Manage DNA User Selections
- **View Reports** – View Crystal reports

Once you have identified which pages are required for which role, they can then be associated to that role.

To associate pages to a role, first select the role from the **List of roles** and then click on the **Widgets** tab in the selection box.

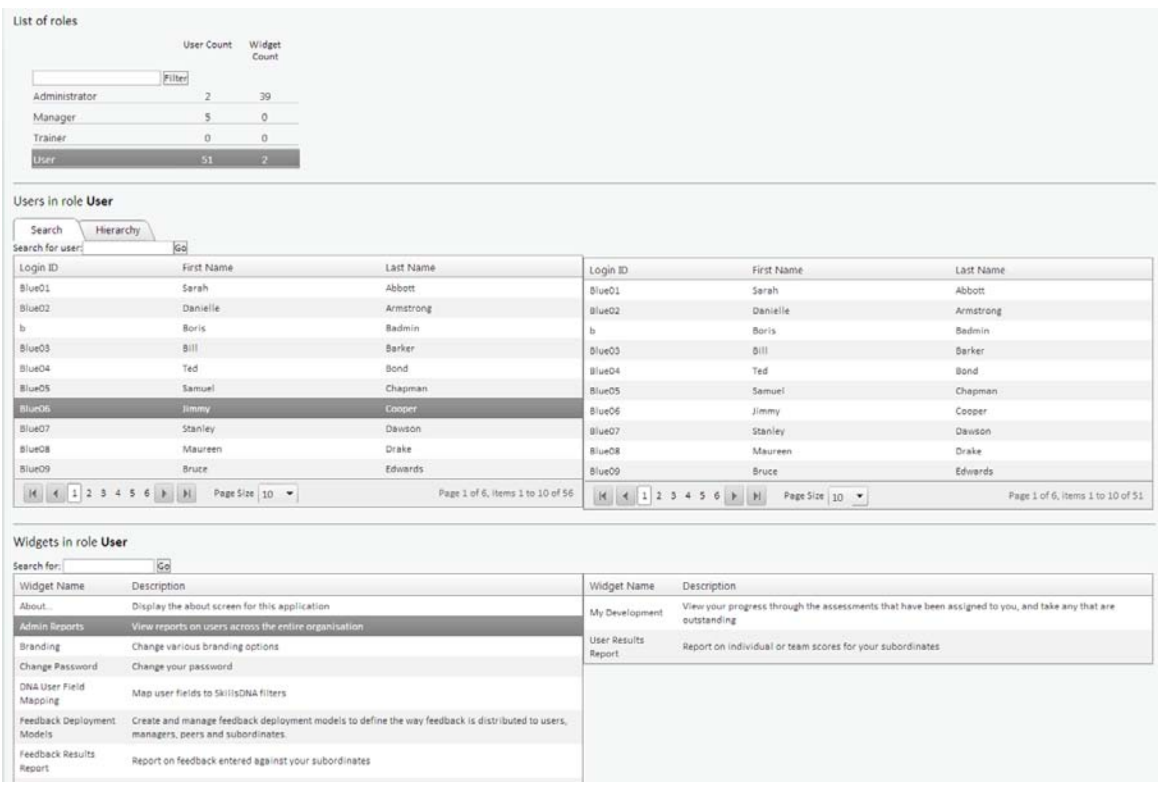


Figure 18: Associating a Widget with a Role

Right click on the required widget and select `Add to role`.

Users can then create their own tabs and associate the widgets or see the next section on how to create pre-defined templates by role.

Figure 19: Creating Tabs and Associating Widgets

It is possible to set the default page for individual roles by selecting a role and then choosing one of the available widgets for the role from the `Default widget for role` section located at the bottom of the `Roles & Widgets` page. The default widget will be the widget that open automatically when the user logs into the system.

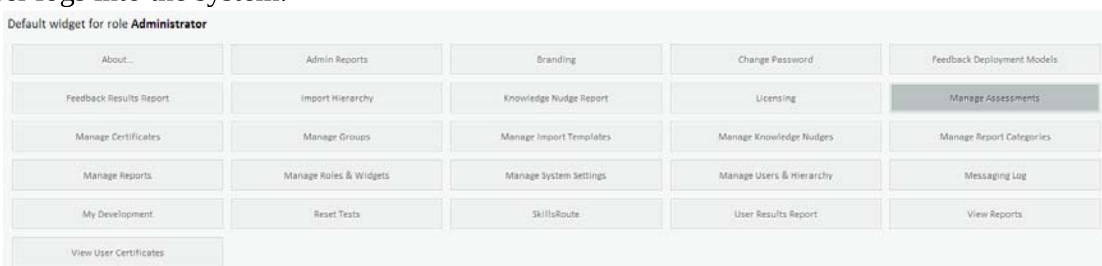


Figure 20: Setting the Default Widget for a Role

Create New Roles

To create a new Role, right click on an existing position and select `New Role`. There is also the option to `Rename` the position or `Remove the Role`.

Once the new Role has been created, users and pages can then be associated and a template containing the pages can be created.

Trainers must be assigned to the trainer role so that they appear in the assessment `Select a Trainer` screen.

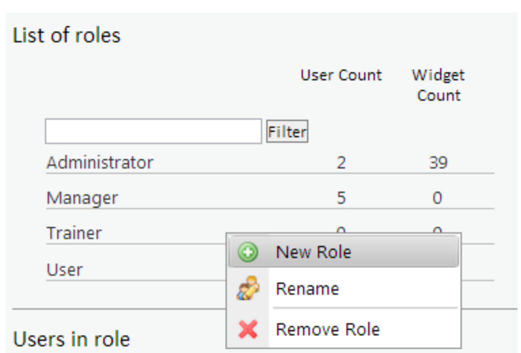


Figure 21: Managing Roles

System Settings

In the System Settings page, the User Fields, Field Mappings and customized Widgets are found.

User Fields

The user fields information contains the mandatory Login ID, Last Name & First Name detail together with any other relevant information for the user. This information is also used for reporting purposes and for viewing filtered DNA.

Mandatory information has to be unique to the user.

Additional user fields can be added by entering the information and clicking the '+' icon.

The order in which the user fields are displayed can be changed by using the up or down icons at the side of the specific user field.

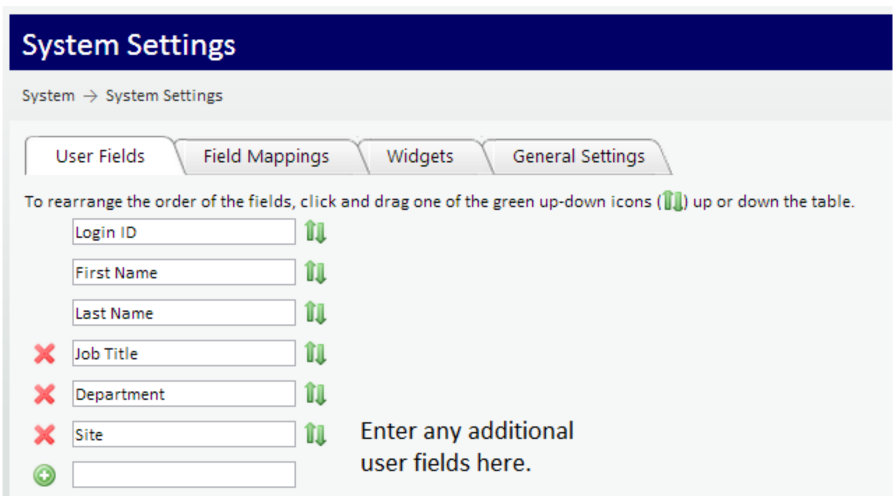


Figure 22: Adding Additional User Fields

Field Mappings

The Field Mappings information is used to select which user field should be used to verify individual users when they log on to the system. In the example below, users will be required to provide their Login ID and their password to log in.

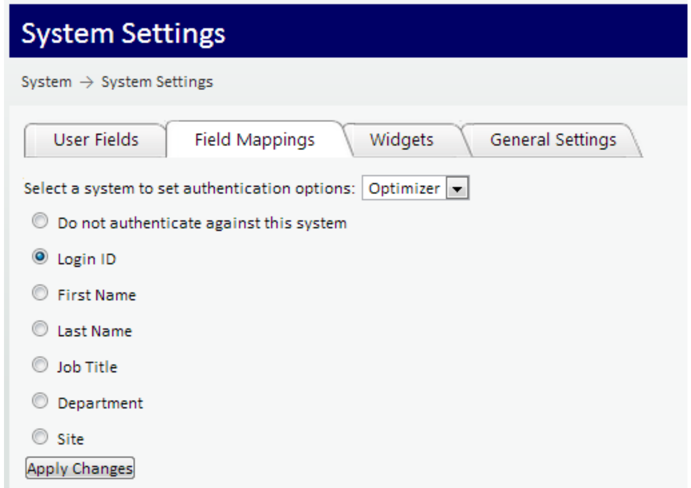


Figure 23: User Login Credentials

Widgets

The Widgets tab allows for external widgets to be included in the application. Enter the required information and the relevant URL to be able to access them.

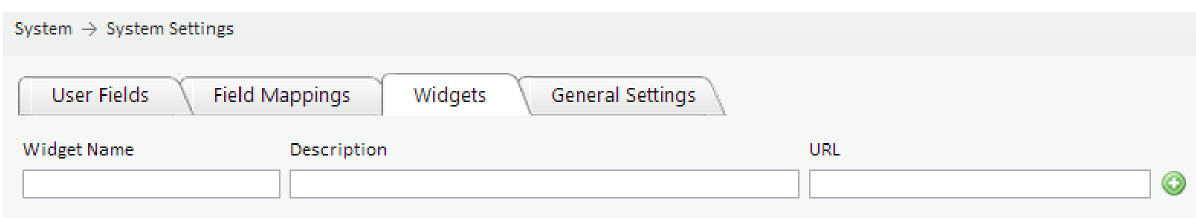


Figure 24: Widgets Tab and External Widgets

General Settings

General Settings allows configuration of `other settings` as per the example below.

Analysis min data points - enables the exclusion of low volume data points presented in SkillsAnalysis.

AICC – is only for use in conjunction with an LMS.

CSV Extension – specify which extension should be used for exporting data.

Pass text / Fail Text – this information is presented back to the user on completion of an assessment.

Kite Diagram Enabled – a one off report view on completion of an assessment.

Assessment Defaults – leave this selected as default.

Combined tests require signing with a password – selected where a combined manager/user feedback assessment requires agreement between the two parties and the password is used as part of the completion process.

Message manager on assessment completion – selected to notify the manager when a team member completes a combined feedback assessment.

Email Field – select the relevant email field.

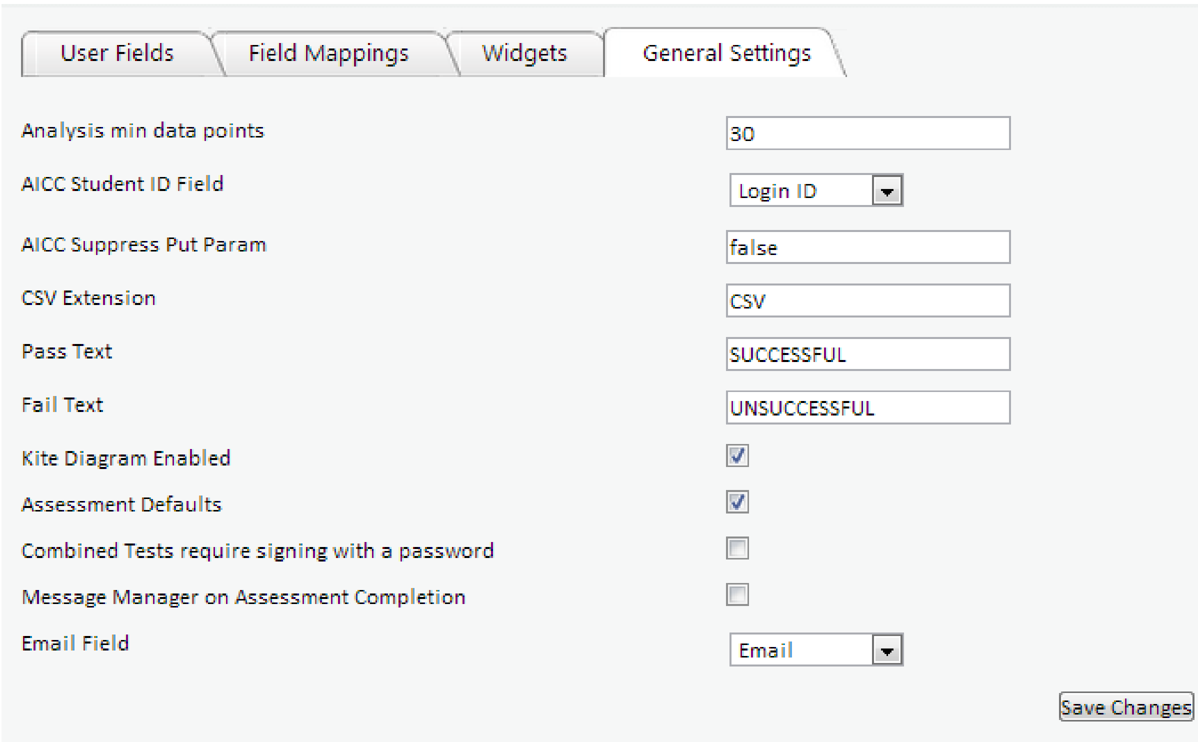


Figure 25: General Settings

Groups

Groups are created for the purpose of managing multiple users who need to take the same assessments.

The Groups page will contain any existing Groups together with the number of users and assessments associated to them.

New Groups can be created by right clicking on an existing group and selecting `New Group`. There is also the option to rename or delete the Group.

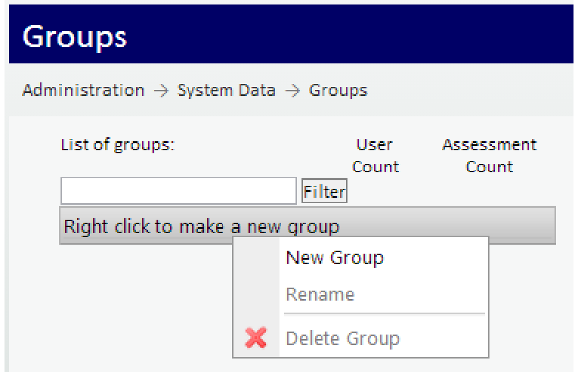


Figure 26: Managing Groups

By clicking on a Group in the left hand window the users and assessments associated to that group are visible in the `Users in Group` window.

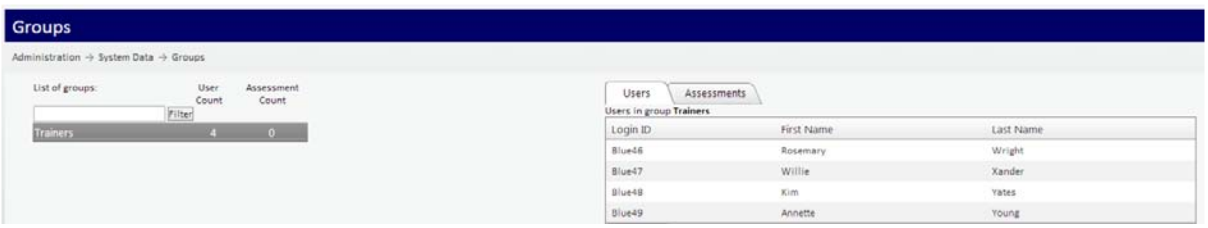


Figure 27: Viewing a Group's Users

To add a user highlight the required Group, right click on the user and select `Add selected user(s)`. Viewing the user within the hierarchy is available by selecting `Find user in hierarchy`.

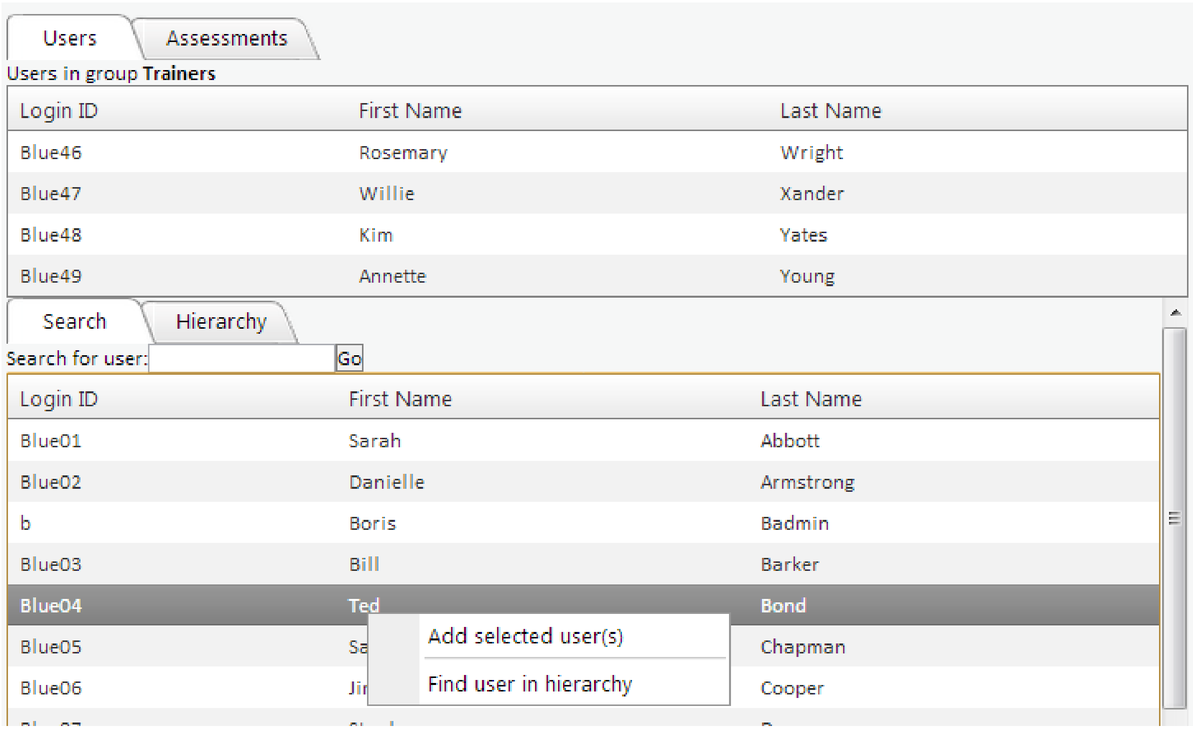


Figure 28: Adding a User to a Group

To associate an assessment to the Group, highlight the Group, select the `Assessments` tab and right click on the assessment to select `Add assessment to group`.

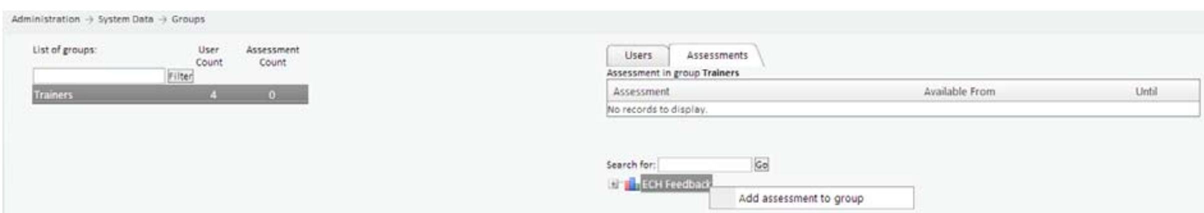


Figure 29: Associating Assessments with Groups

After the assessment has been associated there is the option to give it an available to / from date. This ensures that the users cannot take the assessment before or after the date is required.

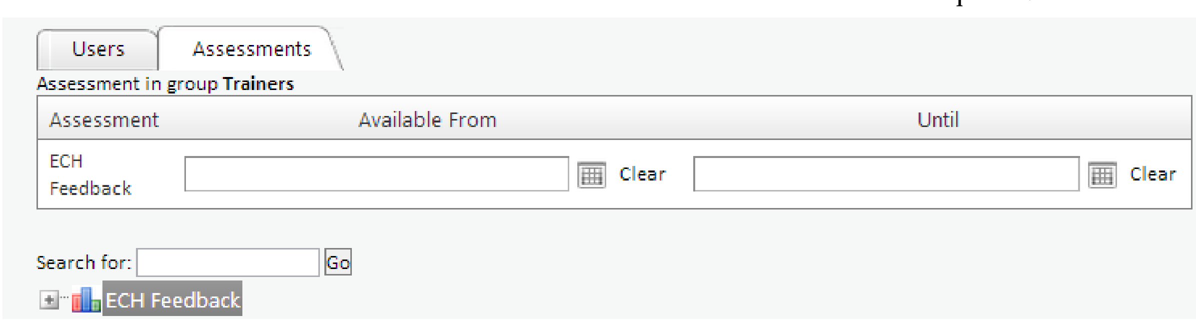


Figure 30: Setting Assessment Dates

To set the `Available from` and `Until` date for an assessment, click on the calendar icon. A calendar will be presented, as per the example below. Select the required date and this will then automatically appear against the assessment. If a date is entered in the `Until` column against the assessment, then this will be visible in the users `My Development` window. If a date is entered in the `Available from` then the user will not be able to launch the assessment and will receive a message accordingly.

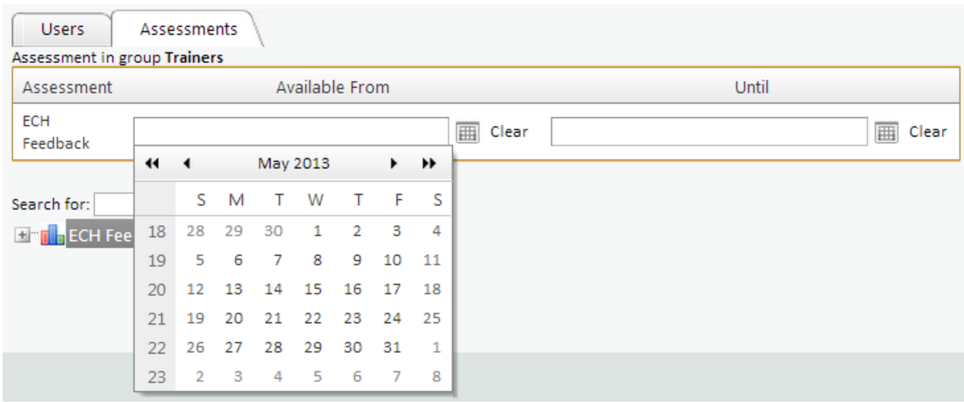


Figure 31: Setting Assessment Dates

User view of assessments with assigned completion dates. Where there is a start date in the future the assessment will be visible but not available.

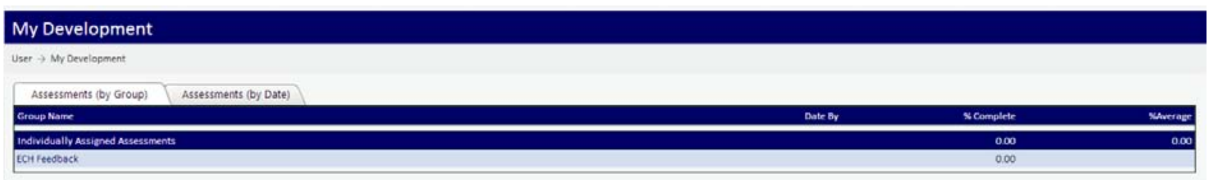


Figure 32: View Assessment and Assigned Completion Dates

Assigning Users into Groups Based on Hierarchy

Users can also be assigned to a Group(s) based on hierarchy.

Highlight the required Group and then select the `Hierarchy` tab. After selecting the required user, right click and select either `Add user(s) in this position` – which will only add the selected user

Or

`Add user(s) in all sub-positions` which will add all of the subordinates underneath the initial user, into the selected Group.

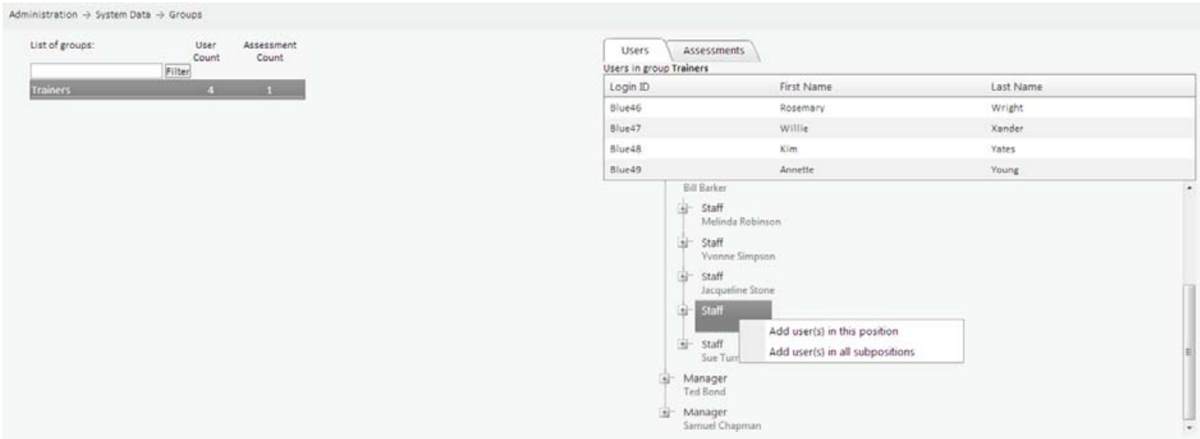


Figure 33: Assigning Users to Groups based on Hierarchy

Manage Assessments

Assessments are created and managed in the Assessment page.

After selecting the page, the assessments window will be presented as per the example below.

There are three modules available:

1. Design – create and design the assessment
2. Reports – print an assessment.
3. Import/Export – import existing assessments, export an assessment to share or export for use in an LMS

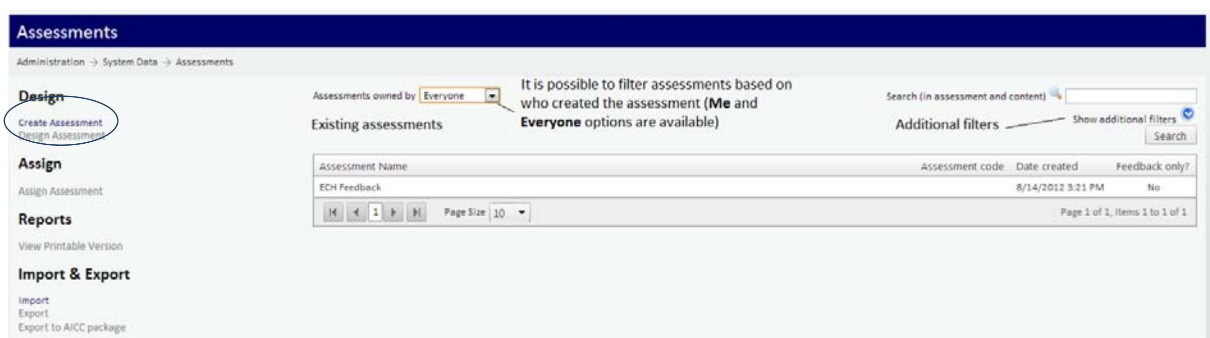


Figure 34: The Assessments Page

To create a new assessment click on `Create Assessment`.

This will present you with the creation template as per the example below.

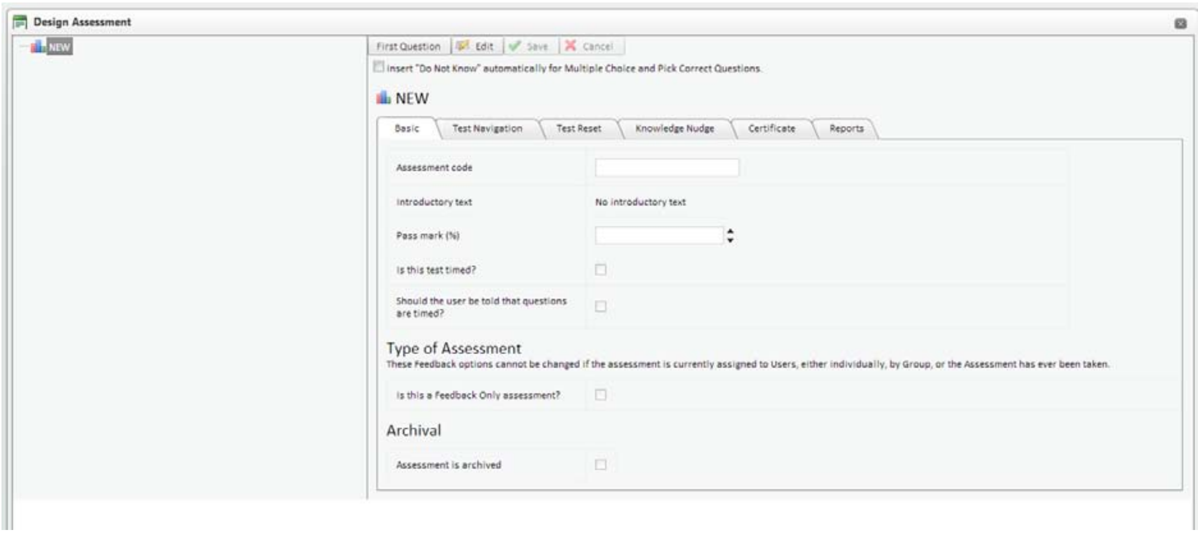


Figure 35: Creating Assessments

Rename the assessment by clicking on `New` in the left hand box.

Basic information can now be configured for this assessment by selecting `Edit`.

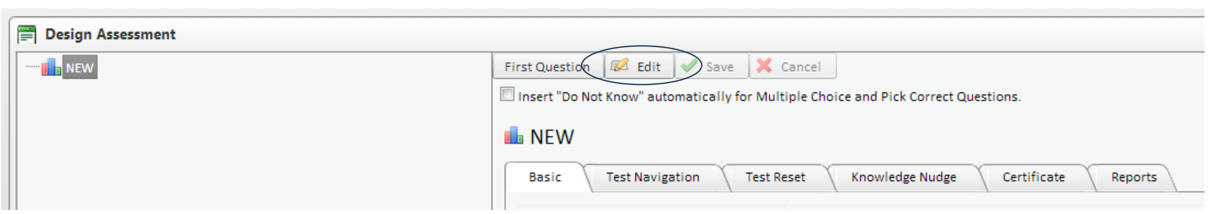


Figure 36: Editing Assessment Details

There are several options that can now be selected and configured:

There is the option to insert `Do Not Know` automatically for multiple choice and pick correct answer questions.

Enter information in the `Assessment Code` field if this is for an LMS.

Customized introductory text can be created in the `Introductory text` field.

Enter a required overall pass mark in the `Pass mark` field.

Select `is this test timed?` to make the assessment timed which will then allow you to enter a duration for the assessment.

If the assessment is a feedback only assessment, then check the `is this a Feedback Only assessment?` checkbox.

To archive an assessment tick the `Assessment is archived` checkbox.

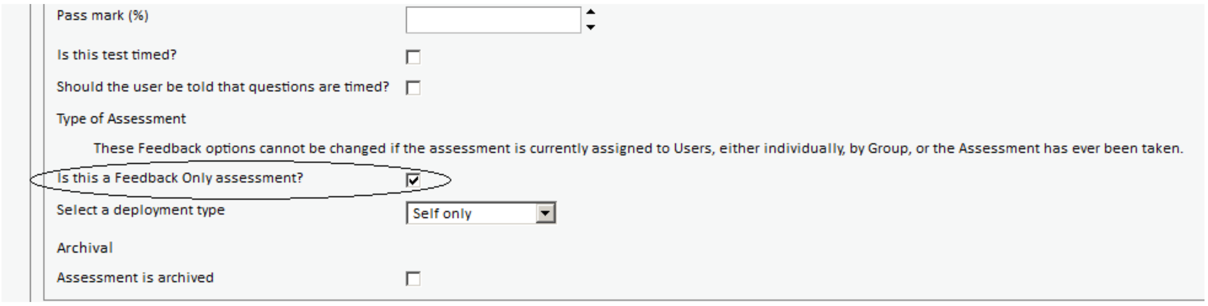


Figure 37: Feedback only and Archive Settings

Click on `Save` when you have finished making changes.

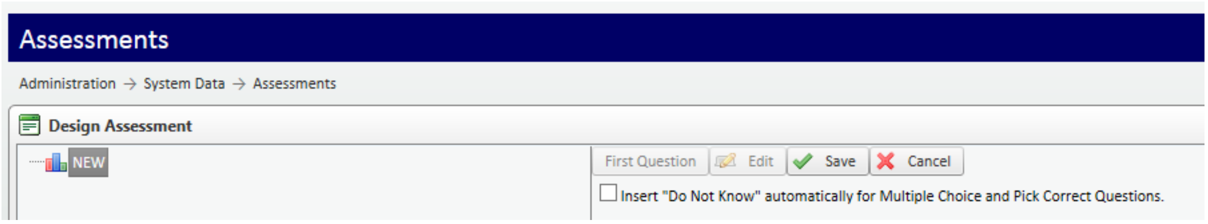


Figure 38: Saving Changes

Once the basic information has been completed, create new content by right clicking on the assessment at the left hand side and select `New Content`. There is also the option to copy or link (shortcut) to existing content.

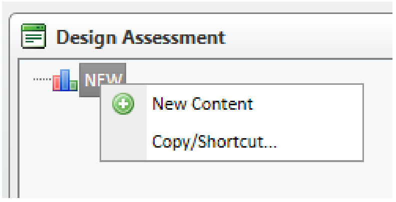


Figure 39: Adding New Content to an Assessment

The option to configure the minimum and maximum number of questions for the content is then available together with the option of an introductory text and the content pass mark. By leaving `Can Copy` selected this will allow the content to be copied or linked to another assessment.

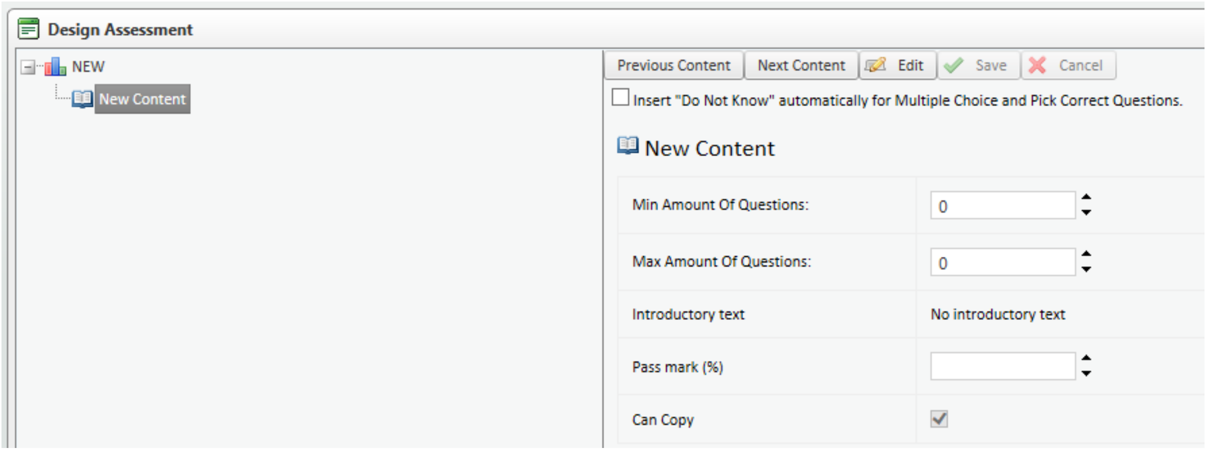


Figure 40: Assessment Settings

To create a new question, right click on the Content and hover over the `New Question` option.

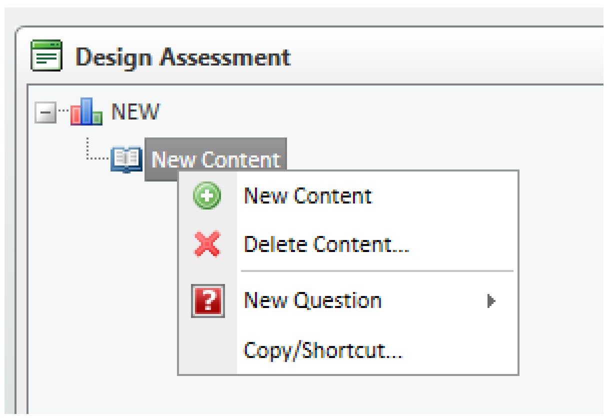


Figure 41: Adding Questions to Assessments

Select the appropriate question type when the `New Question` menu opens.

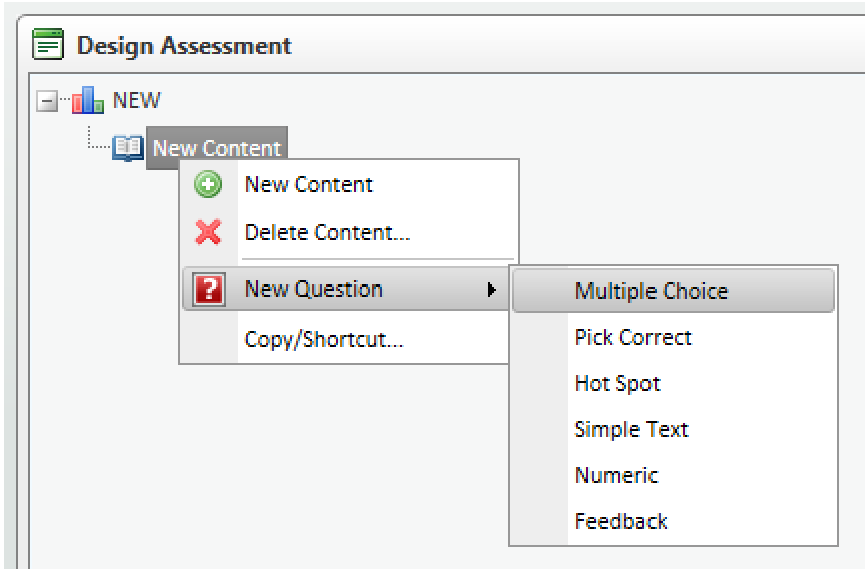


Figure 42: Setting the Type of a New Question

In the example Multiple Choice question below, a default score of 1.00 will already be associated. There will also be the option to include an external URL together with a description of the URL site. This allows a link to be included in the question text for the user to click on to access. This allows the user to connect to this application and search for the correct answer.

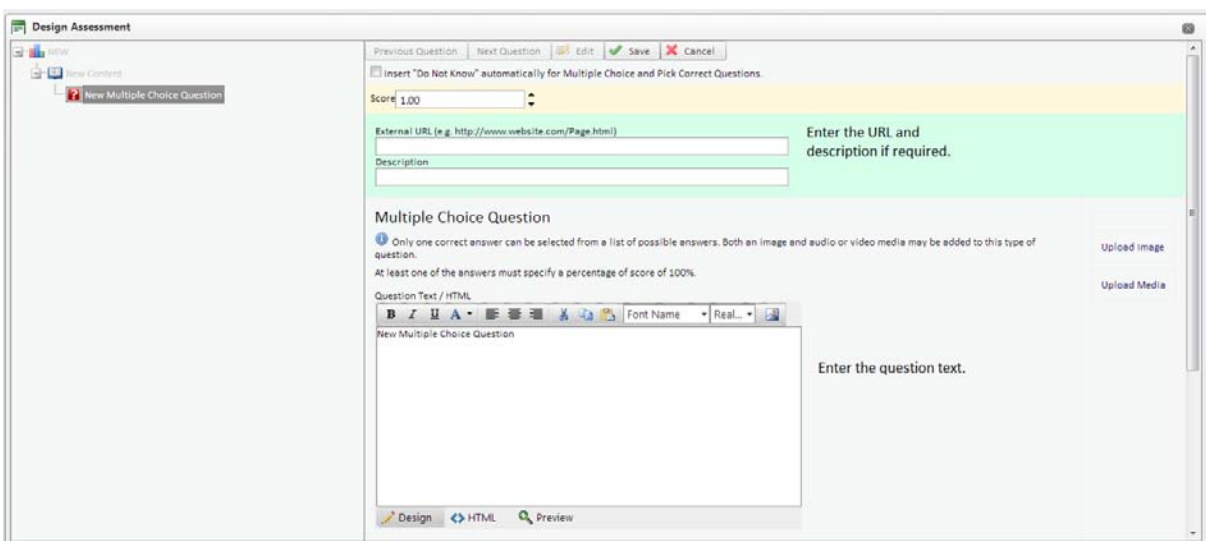


Figure 43: Adding External URLs to Questions

To create a new answer, click on the `Insert New Answer` box.

There is also the option to change the question type between Multiple Choice and Pick Correct Answer.

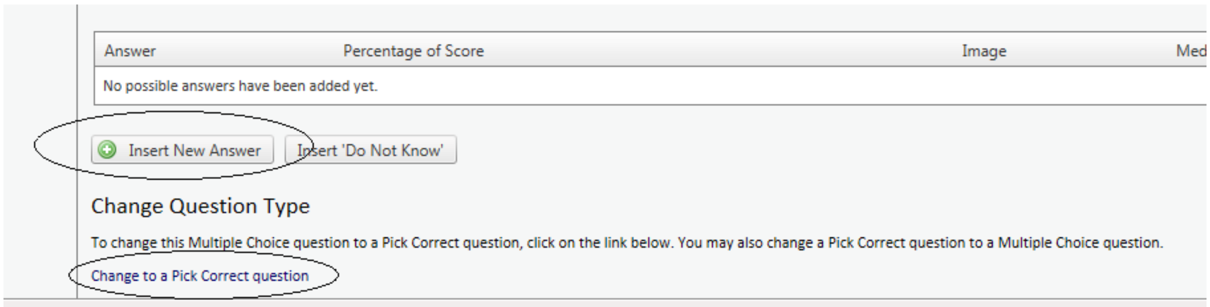


Figure 44: Changing Question Types and Adding Answers

The create new answer window will then be presented to enter the answer text.

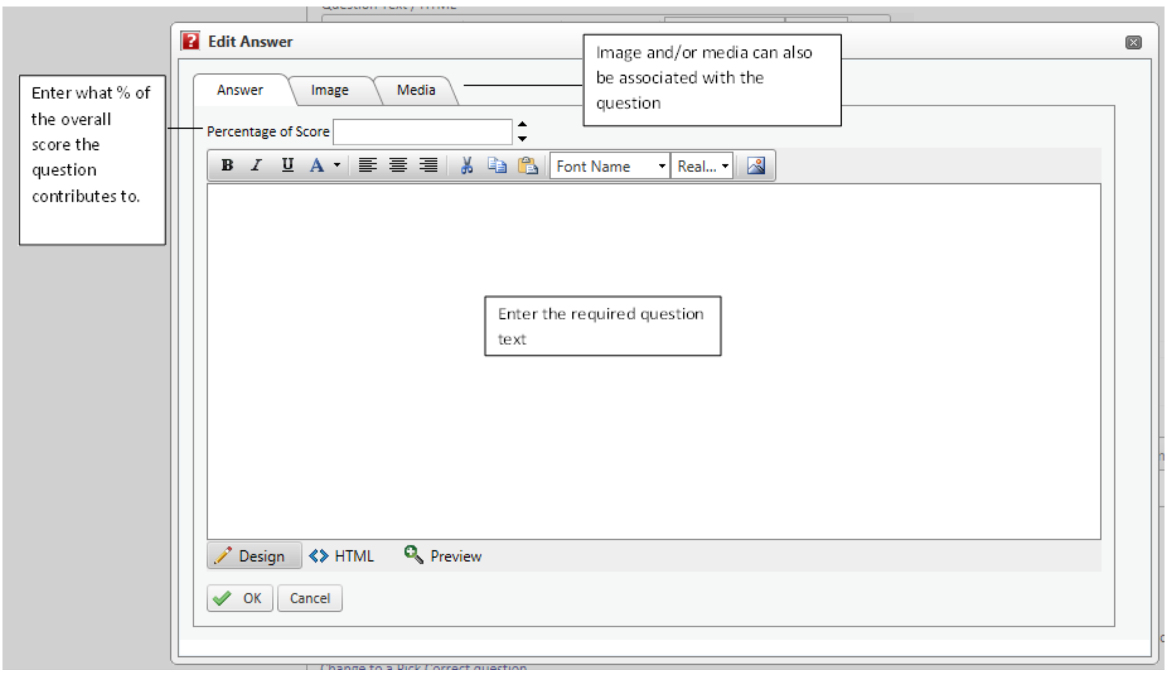


Figure 45: Setting Question Value, Additional Media and Text

After selecting `Image` the following window will appear to browse for the required image. After selecting `Upload Image` the image will appear below `Preview` to confirm that the correct image has been selected. To save the information return to the `Answer` tab to click on OK once the question has been completed.

It is recommended that media files using the .FLV, .MP3 or .MP4 formats are used in Skills Assessor. The in-built media player may work with other media formats but these are not supported.

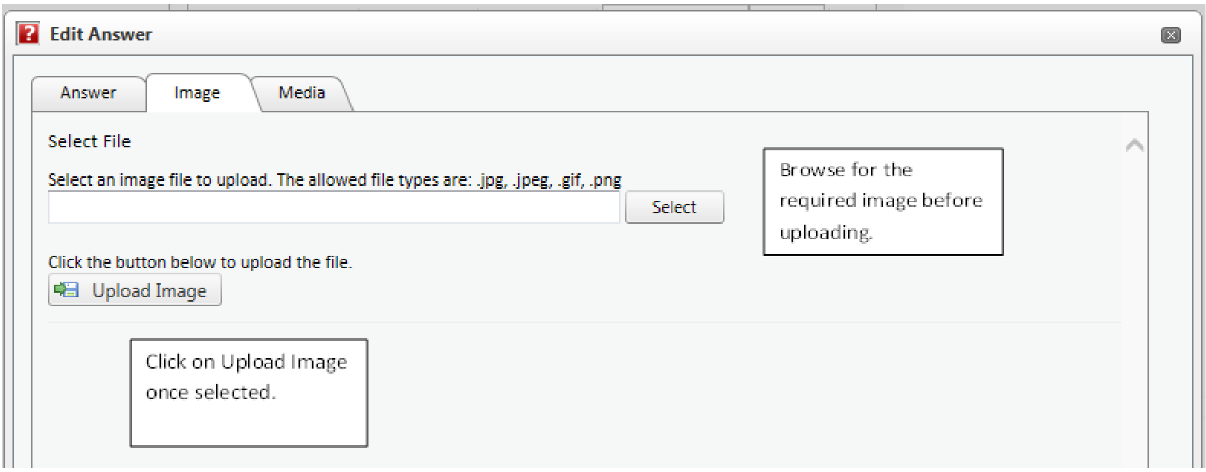


Figure 46: Adding an Image to a Question

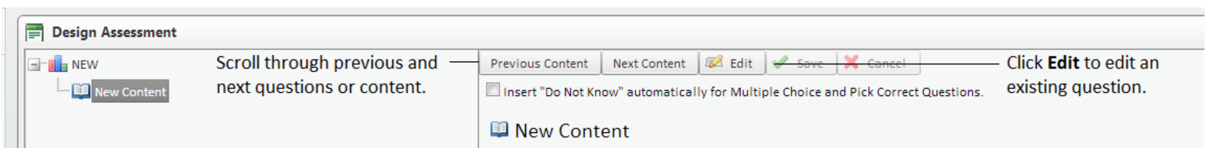


Figure 47: Adding an Image to a Question

Hot Spot Questions

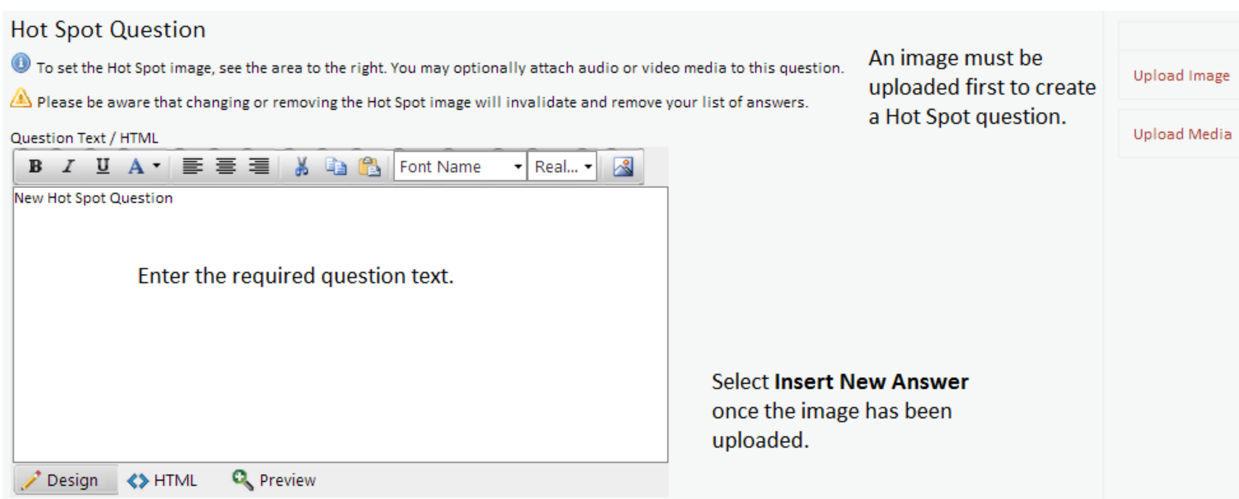


Figure 48: Preparing a Hot Spot Image Question

Follow the instructions to define the hot spot answer area.

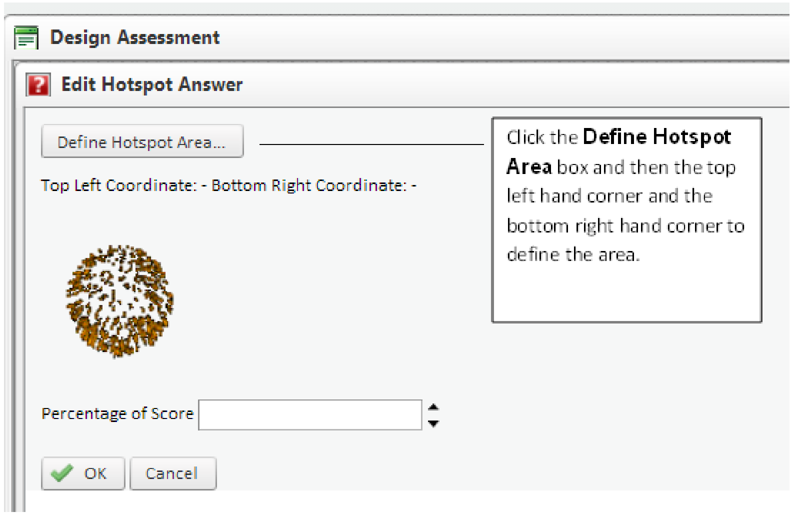


Figure 49: Defining a Hot Spot Answer Area

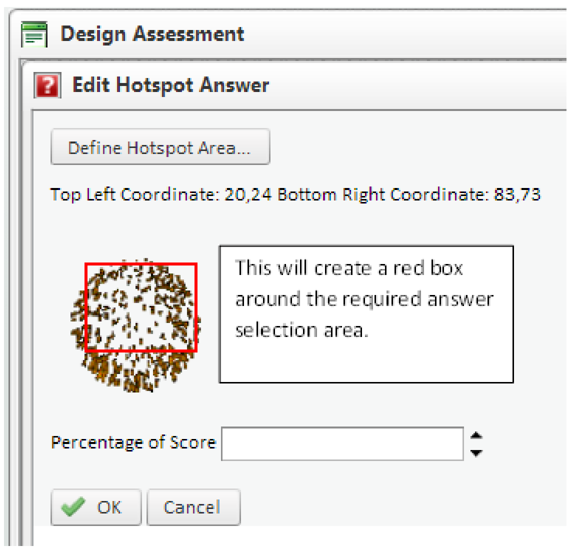


Figure 50: Defining a Hot Spot Answer Area

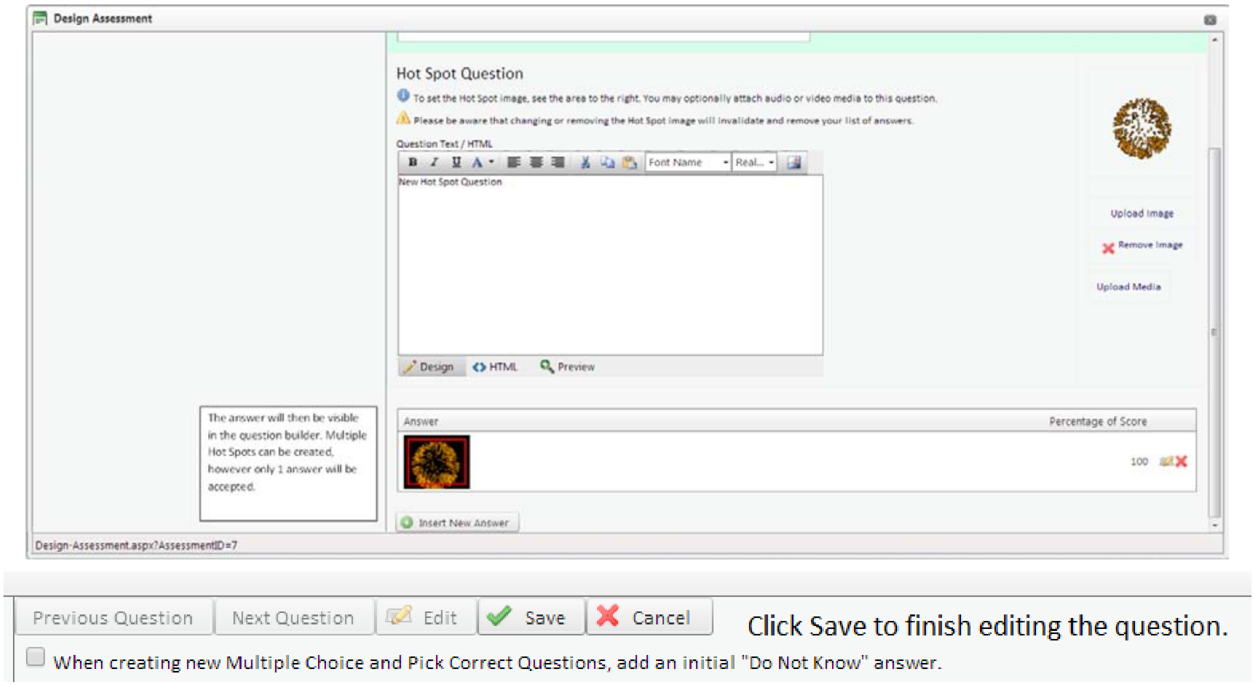


Figure 51: Display of Hot Spot Answer

Simple Text Question

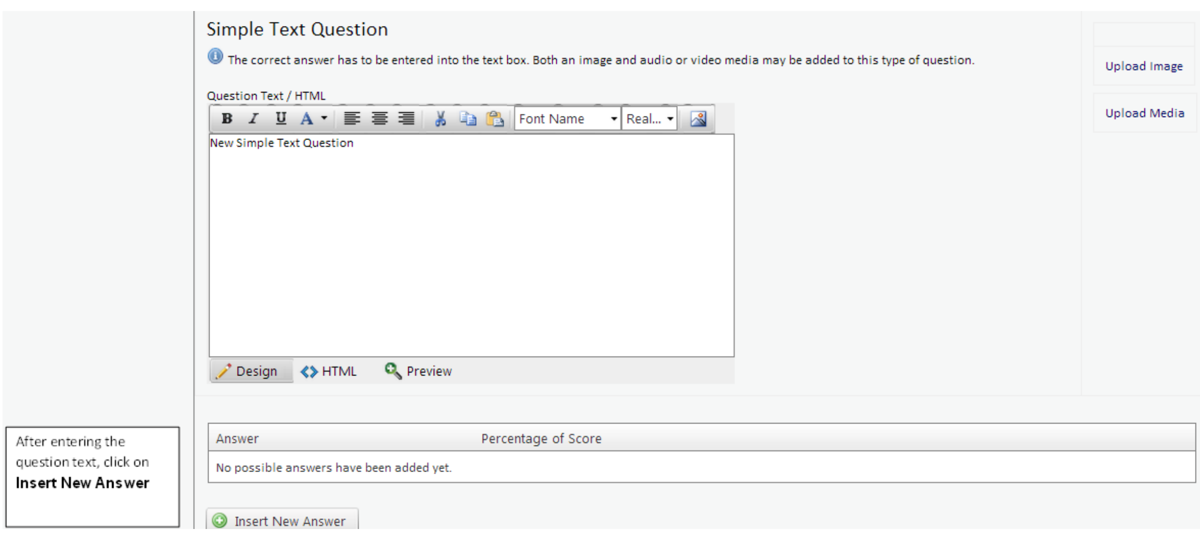


Figure 52: Creating Question Text and Adding an Answer

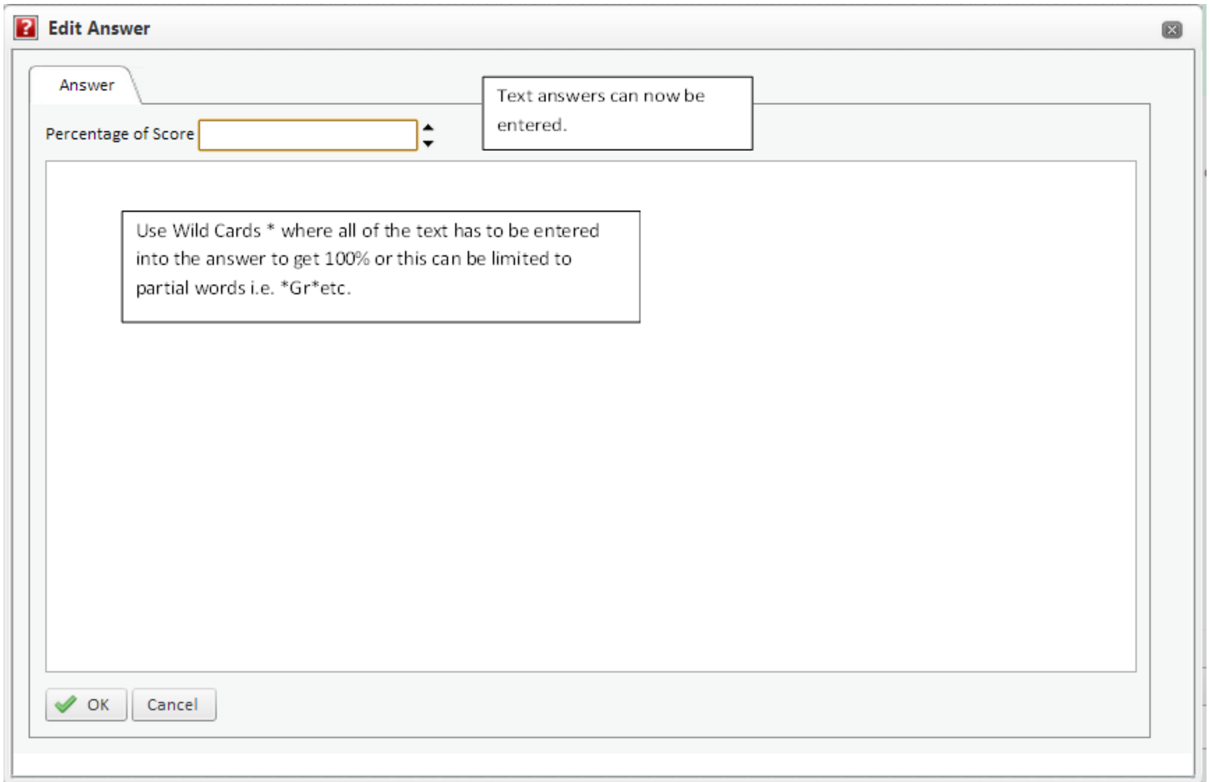


Figure 53: Adding Answers and Using Wild Cards

Wild card characters can be used when defining answer text for a simple text question. For example if a set of words are required to be entered in order, e.g. 'red', 'green', 'blue' the entered answer text should be: "*red*green*blue*" (without quotes). Alternatively, if the exact order of the words is not important, the entered text should follow the format: "*red*,*green*,*blue*" (without quotes). Note that commas in the expression should not be followed by space characters.

Numeric Questions

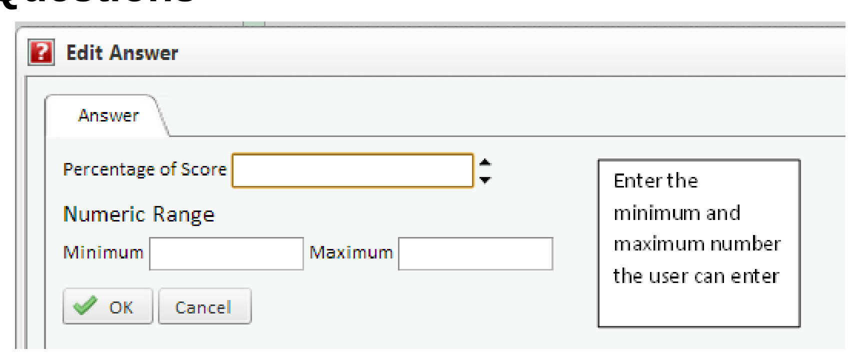


Figure 54: Delimiting Ranges for Numeric Questions

Feedback Question

Note: Feedback questions cannot be combined with any other question types. Different content sections are created to separate feedback and non-feedback questions.

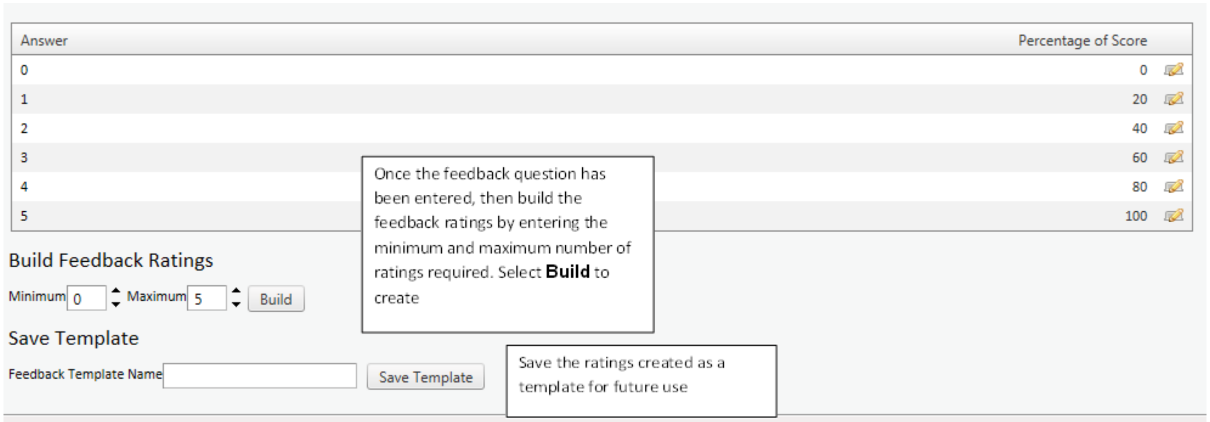


Figure 55: Delimiting Ranges for Feedback Ratings

After selecting `Build` the number of minimum and maximum ratings will be presented for completion. Clicking on `Build` will present the ratings to be completed. Click on the number at the left hand side to enter the detail.

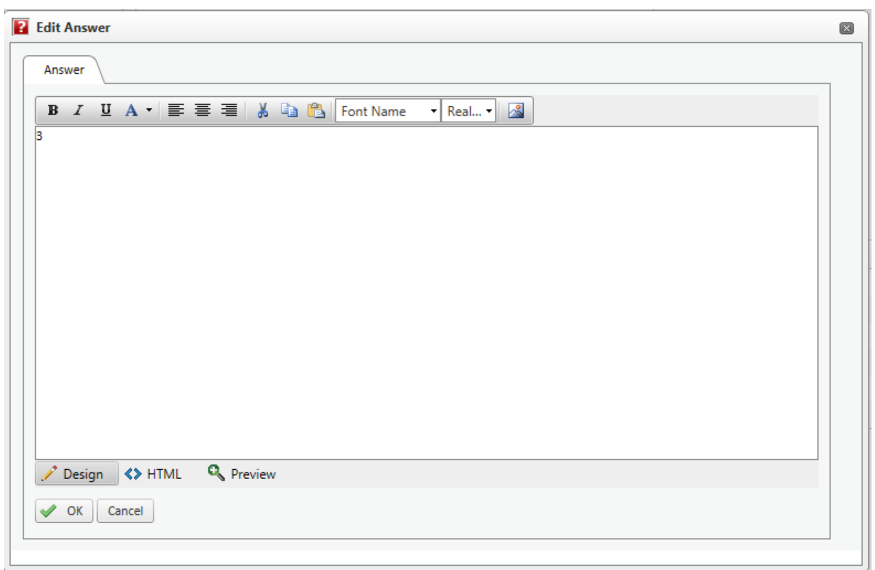


Figure 56: Adding Detail to Ratings

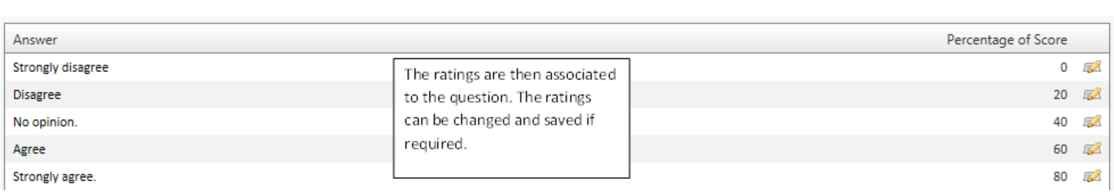


Figure 57: Display of Rating Detail and Associated Questions

To edit an existing question, select the question and click on `Edit`.

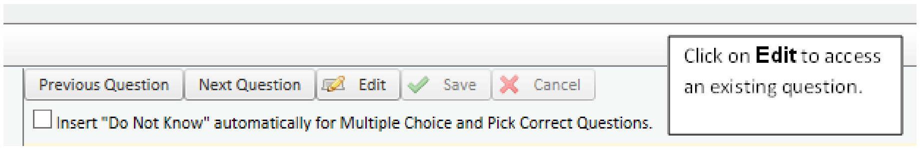


Figure 58: Editing Existing Questions

To delete a question right click on the question and then select `Delete Question`.

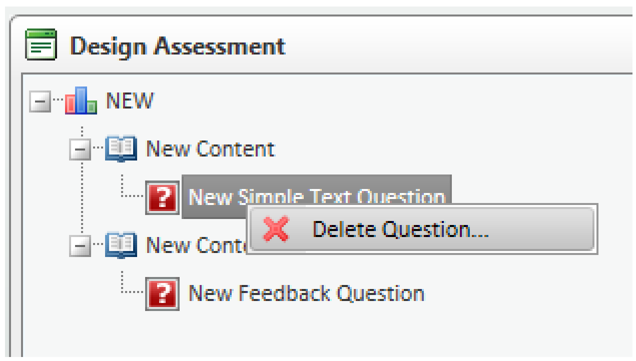


Figure 59: Deleting Questions

To use an existing template for a feedback question, first create a new question and then click on the `Use Template` button after first selecting the required template from the drop down box.

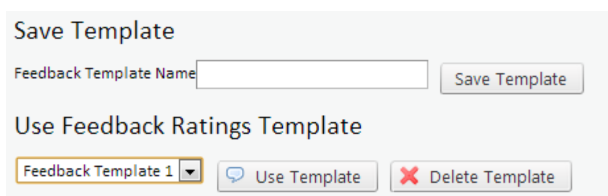


Figure 60: Associating Existing Templates with Feedback Questions

Once the assessment has been completed, click on the assessment name to access the additional functionality.

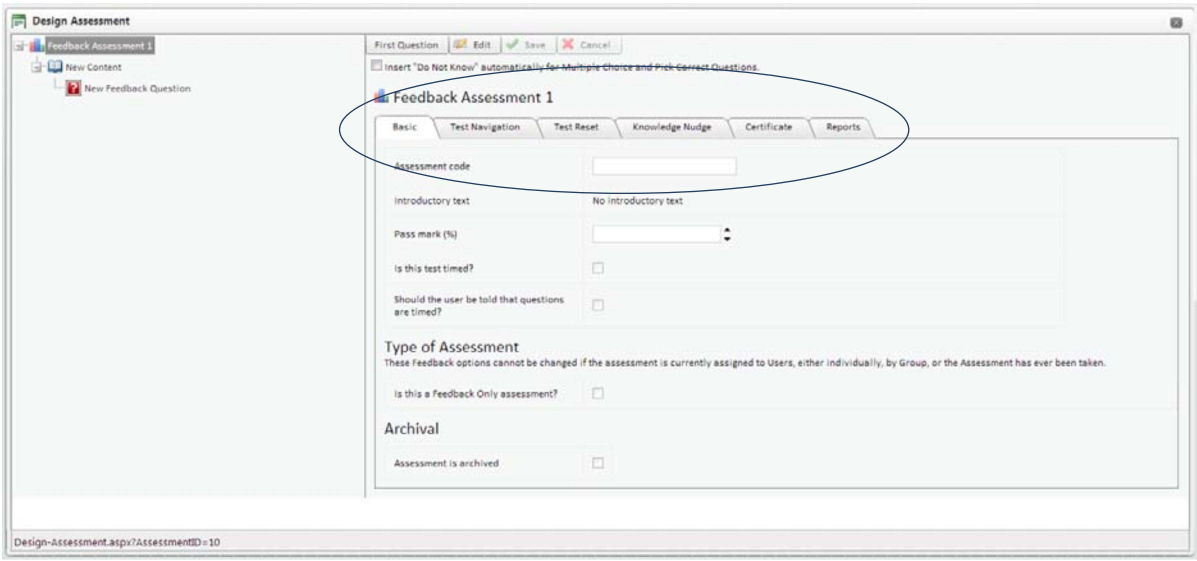


Figure 61: Accessing Additional Assessment Detail and Options

Test Navigation

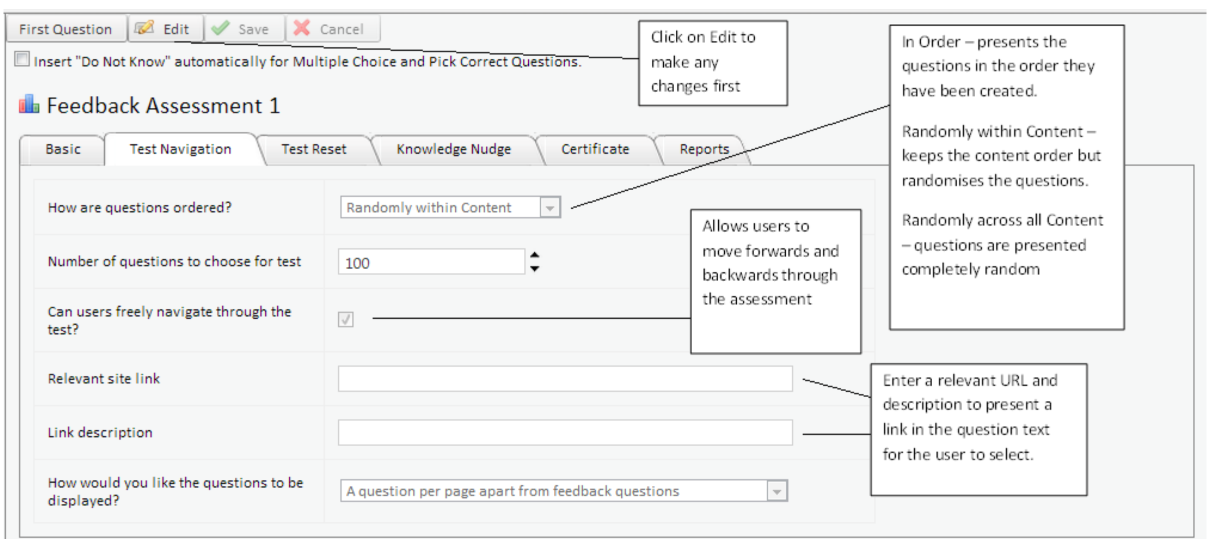


Figure 62: Test Navigation Tab

Test Reset

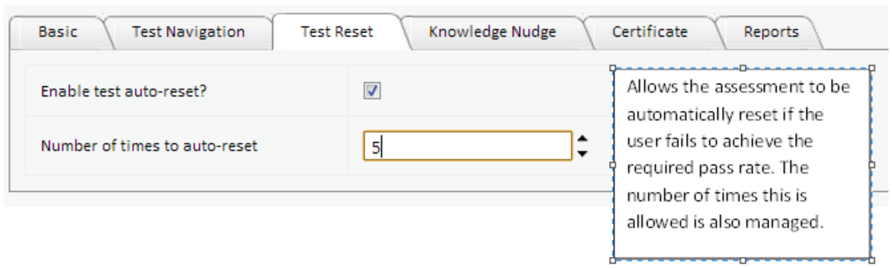


Figure 63: Automatic Test Reset

Knowledge Nudge

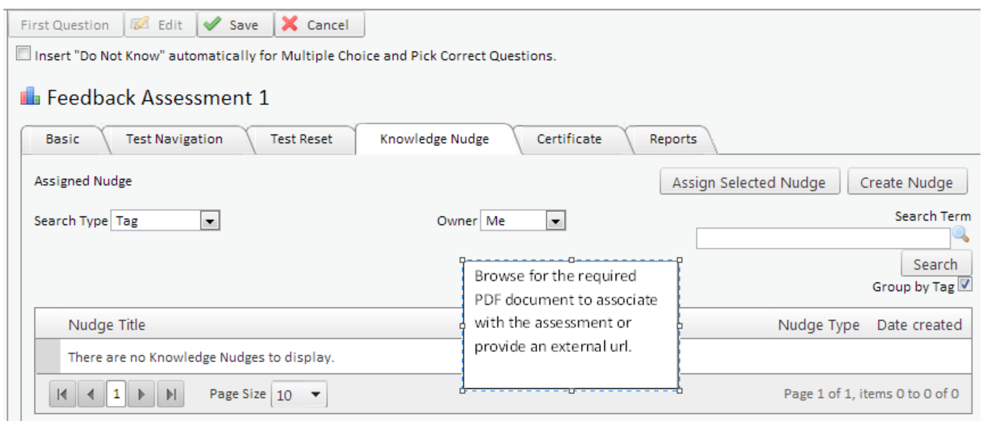


Figure 64: Associating a Knowledge Nudge URL or PDF

Certificates

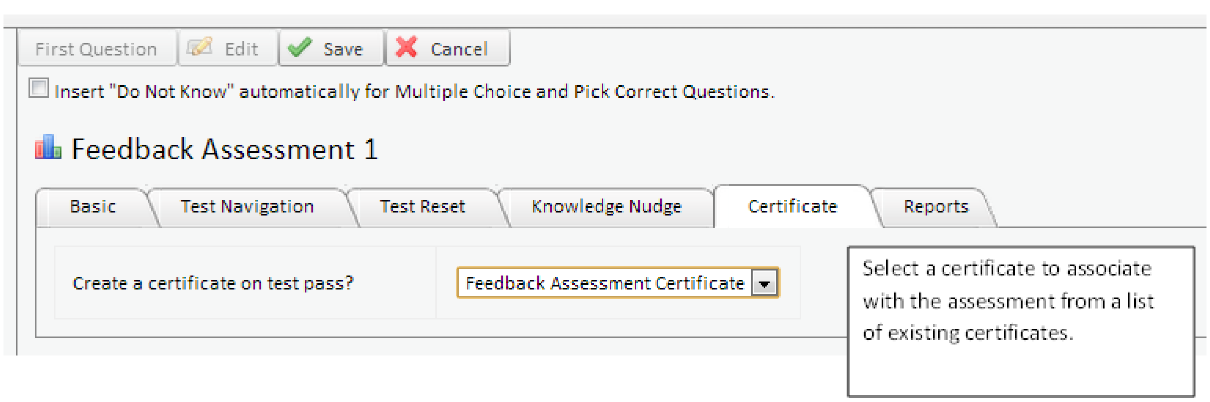


Figure 65: Associating a Certificate with an Assessment

Reports

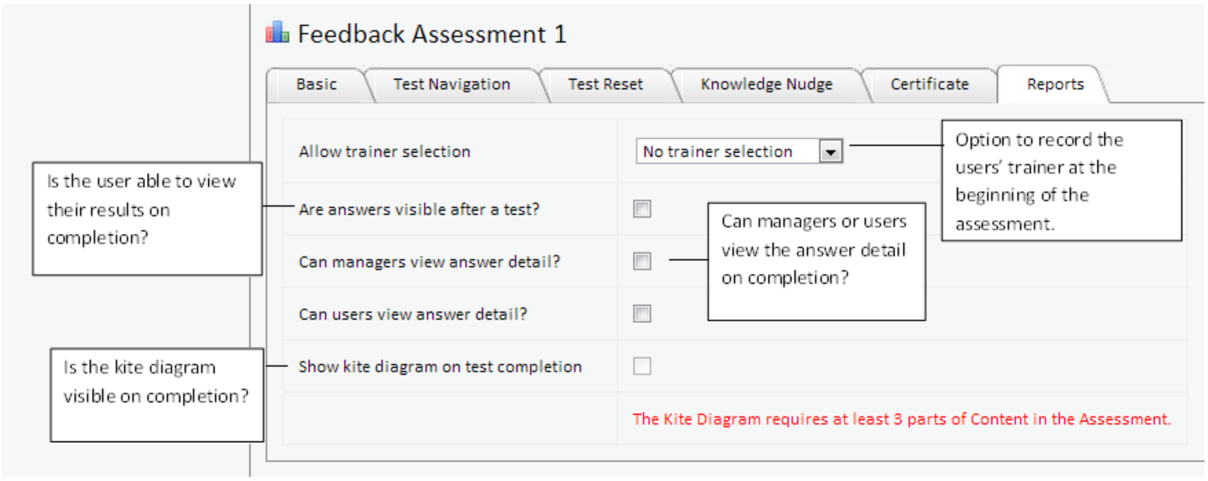


Figure 66: Viewing Assessment Results and Additional Options

To print off a version of the assessment, highlight the assessment first and then click on `View printable version`.

Import/Export

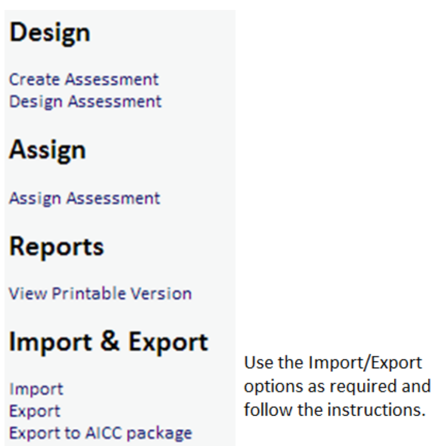


Figure 67: Import/Export Options

Knowledge Nudges

Knowledge nudges are pieces of information that a user must read before they can undertake an assessment. A knowledge nudge can take 2 formats;

- A URL pointing to a website on the internet or an internal intranet site.
- A PDF document.

Knowledge Nudges can therefore be used as a powerful replacement to paper briefings as a user's understanding of the contents can be assessed.

Reporting within Skills Assessor will also detail the number of times that a user has accessed any Knowledge Nudges and the average and overall duration of each view.

Skills Assessor is able to display PDF content. With the use of Microsoft's PowerPoint, Adobe Acrobat or Adobe Captivate interactive PDF documents can be created to deliver a crystal clear message to users which can include video, audio and hyperlinks. Microsoft's PowerPoint, Adobe Acrobat or Adobe Captivate interactive is not included with Skills Assessor and separate licenses are required for these software applications.

In order for Skills Assessor to display PDF content correctly Adobe Acrobat should be installed on the user's computer and this is freely available from Adobe.

Note: Only one knowledge nudge can be assigned per assessment.

Creating Knowledge Nudges

To create new knowledge nudges, go to the Knowledge Nudges page and click Create Nudge. Select whether you require your Knowledge Nudge to be a website external URL or a PDF by selecting the relevant radio button.

The example below shows a website URL of www.myurl.com.

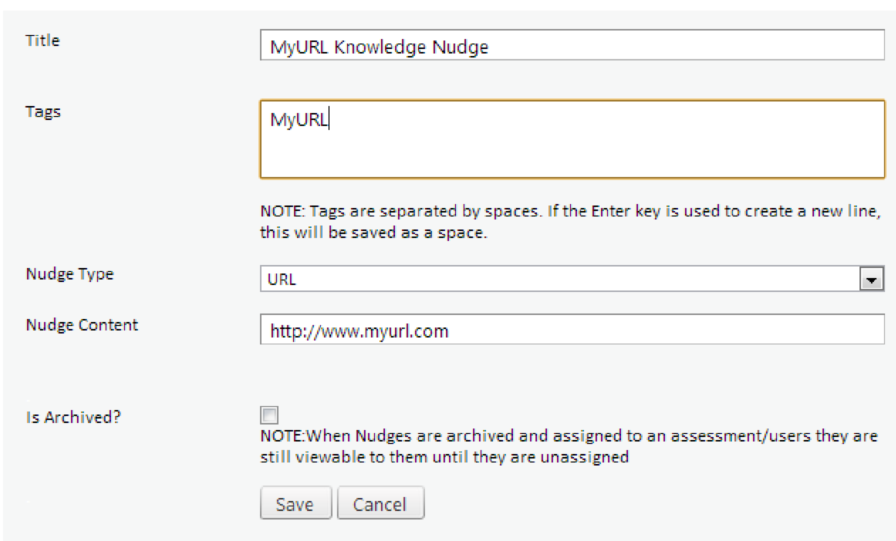


Figure 68: Creating a URL Knowledge Nudge

Alternatively if you wish to upload a PDF to Skills Assessor to be used as your Knowledge Nudge this can be done by selecting PDF in the Nudge Type select box. This will display a `Select` button for you to locate the PDF document on your computer, as shown.

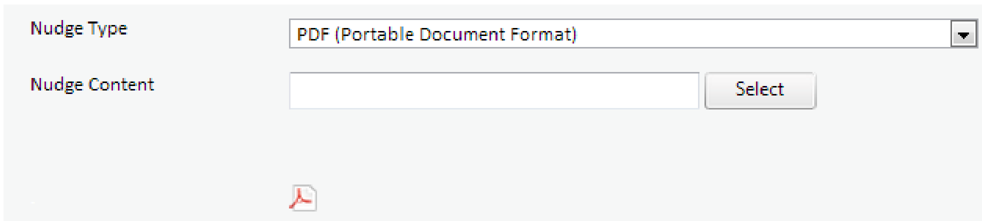


Figure 69: Creating a PDF Knowledge Nudge

In order to create interactive multimedia nudges then you will require additional software not supplied with Skills Assessor such as Microsoft PowerPoint and Adobe Acrobat. If you are using Microsoft PowerPoint you can create a new presentation or use an existing presentation you may have.

You can then design or make changes to your nudges using the wide array of tools available to the user such as text boxes, images, charts and alter color schemes etc. as shown in the PowerPoint screenshot below. Additional help on using PowerPoint can be found within its Help Menu.

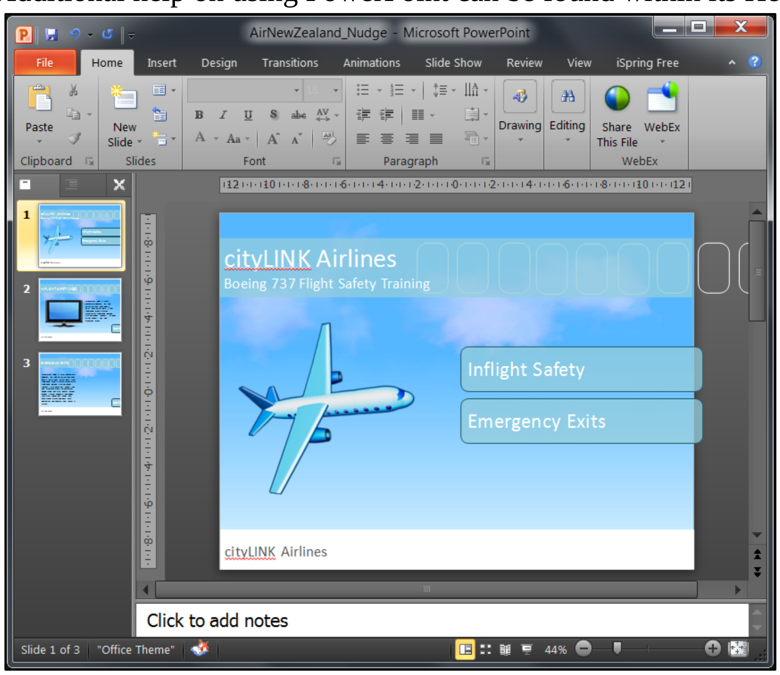


Figure 70: Using Microsoft PowerPoint or Adobe Acrobat to create multimedia nudges

In order to make your presentation interactive you will need to add hyperlinks. These hyperlinks will allow the user to navigate around the presentation by clicking in certain areas. To make an element of your PowerPoint presentation a hyperlink, simply right click it and select hyperlink.

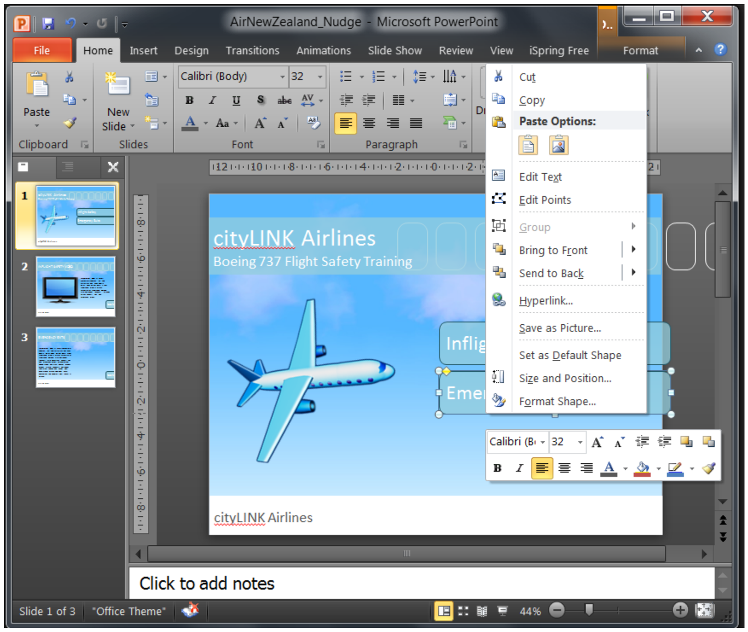


Figure 71: Setting presentation elements as hyperlinks

The hyperlink dialogue box will then be displayed similar to that below. Select the “Pages within this document” option and select the page of the PowerPoint presentation that should be displayed on clicking.

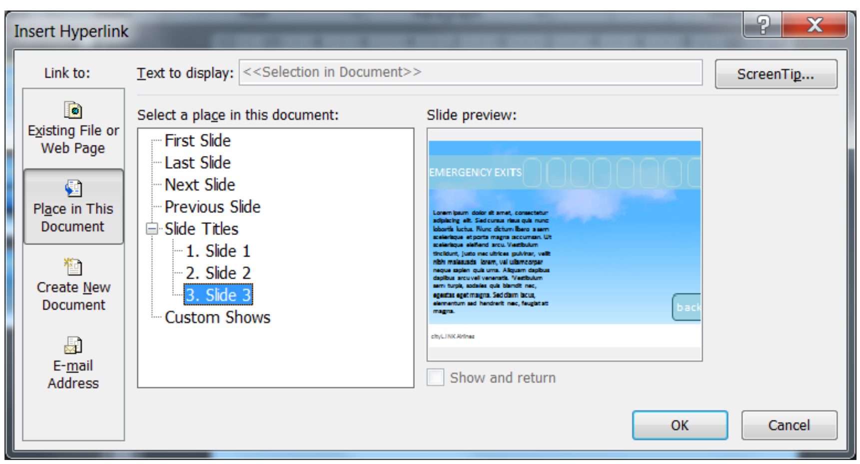


Figure 72: Setting hyperlink target

Click OK when you are happy with your selection. Repeat this process for each of the hyperlinks within your presentation. If you run your slideshow in PowerPoint you will be able to test all of your hyperlinks. When you are satisfied that everything is in the correct place you will need to save your presentation as a PDF document.

More recent versions of Microsoft PowerPoint have the ability to create the PDF document from within it. In the save as dialogue box select PDF in the `Save As Type` drop down menu and locate where on your computer you wish to save the file.

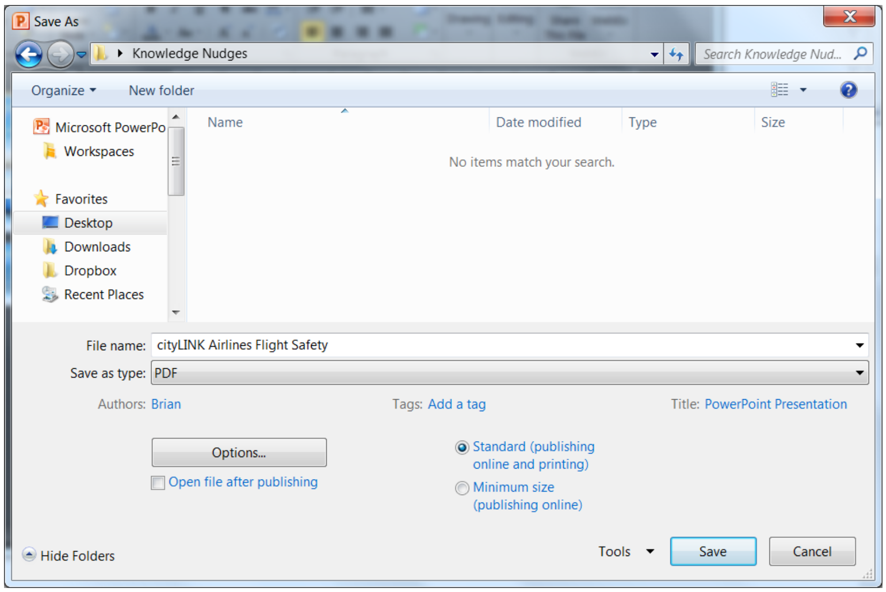


Figure 73: Saving PowerPoint presentations as PDF documents

A PDF of your presentation will then be created with all hyperlinks included. If you do not intend to use any video or audio within your knowledge nudge then it is ready to be included in your assessment as detailed above. If you do wish to add multimedia content then you should open the newly created pdf document within Adobe Acrobat. You will notice that you can navigate around your presentation.

Insert Video Content

Locate a page that you wish to add your multimedia content to then locate your Tools menu in Acrobat. This will display a list of various content types that can be inserted. As shown below.

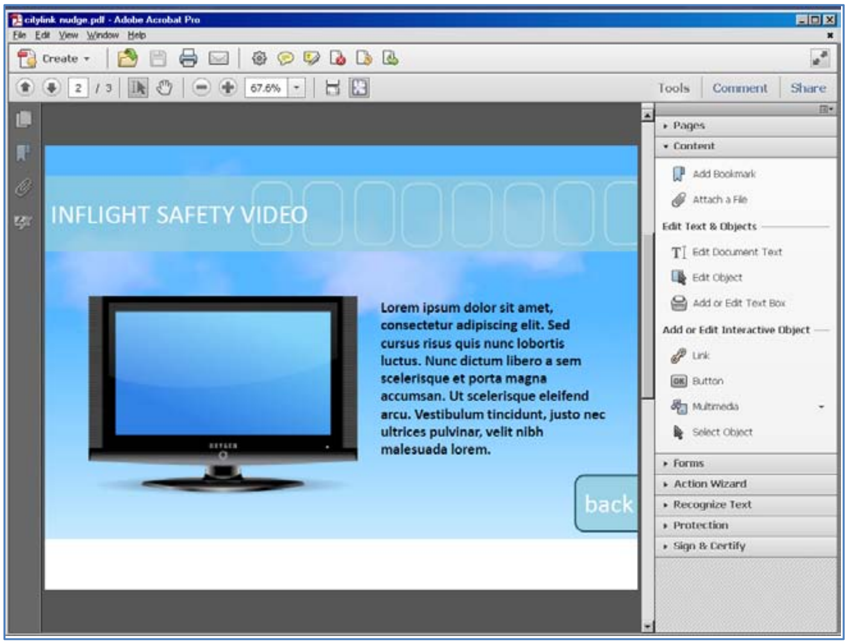


Figure 74: Adobe Acrobat multimedia content types

Select the Multimedia option and choose Video. This will allow you to select an area of your PDF where you wish to insert your video. A dialogue box will be displayed allowing you to select the location of the video you wish to insert.

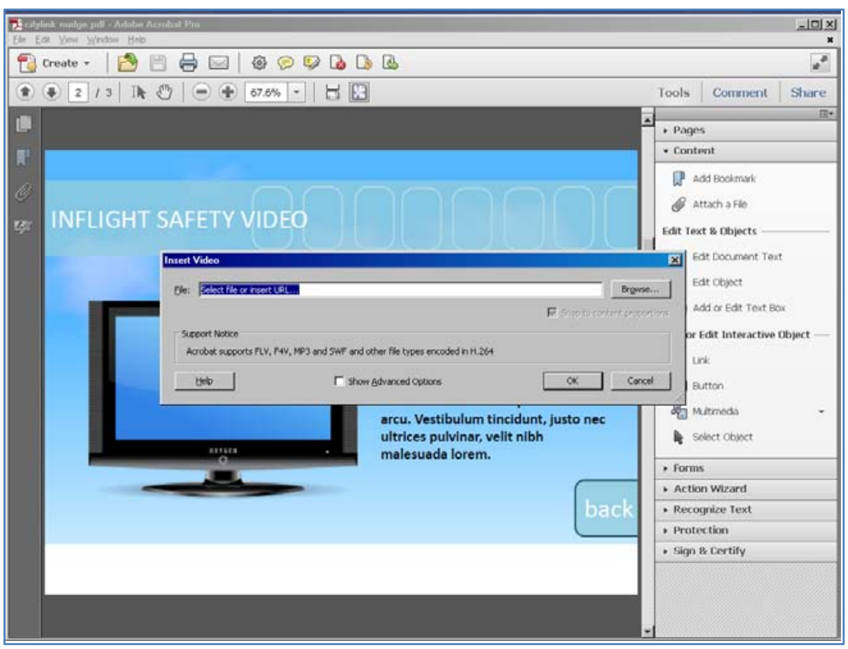


Figure 75: Inserting a video file into a PDF document

Select the `Show Advanced Options` selection. This will enable you to select how you would like the video to be played to the user. You can choose to have the video play automatically as soon as the page is opened or you can only play the video when the video is clicked by the user.

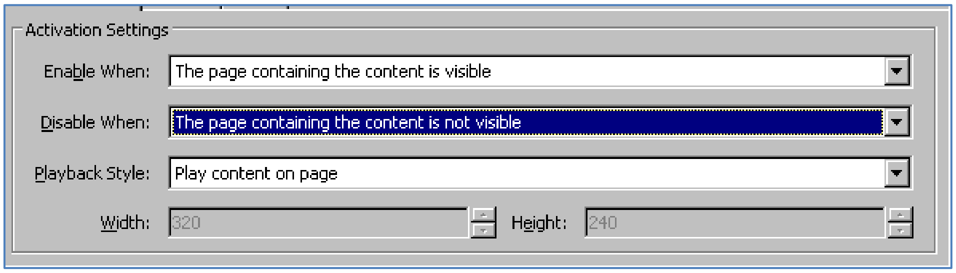


Figure 76: Multimedia advanced options

It is also advisable to select that the content should be disabled when the page containing the video content is not visible to the user otherwise the media will continue to play.

When you are happy with your selections select ok and your video will be embedded.

If you navigate away from your page and return you will be able to see your media display in the way you selected above.

Save your PDF document from the File menu of Acrobat. This document is now ready to be attached to an assessment within Skills Assessor.

When the user selects the assessment they will be advised that there is an attachment to view before accessing the test. The user will not be able to move on to the assessment until they have read the attachment.

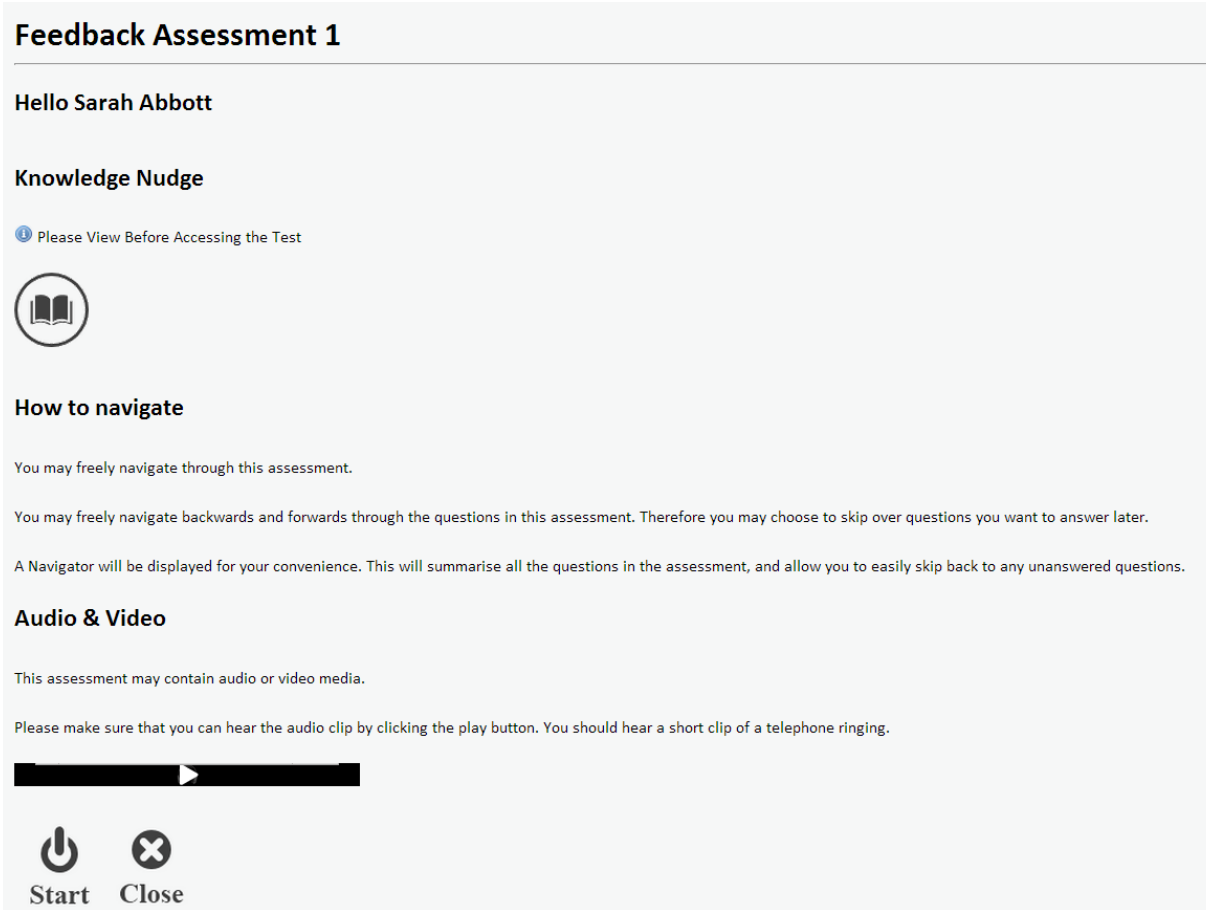


Figure 77: Mandatory pre-assessment attachment

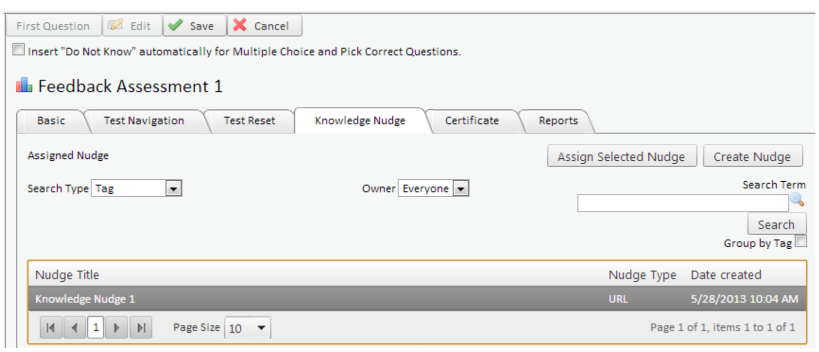


Figure 78: Selecting a knowledge nudge

Follow the steps below to assign a knowledge nudge to an assessment:

1. Go to the **Manage Assessments** page
2. Select the assessment
3. Click the **Design Assessment** link
4. Click the **Edit** button at the top of the page

5. Click the `Knowledge Nudge` tab
6. Select the knowledge nudge from the table (it is possible to search for the knowledge nudge via tag/title/tag & title options)
7. Click the `Assign Selected Nudge` button.

When the assessment is started by a user, the knowledge nudge icon will appear on the first page of the assessment. Clicking on this item will then launch the associated knowledge nudge (URL or PDF).

Users will not be allowed to begin assessments with knowledge nudges assigned to them without first opening the knowledge nudge.

Managing Learning Items

Skills Assessor supports the creation of a range of learning items which can be associated with DNA components to assist in improving user performance. Supported learning item types include: `Assessment, Knowledge Nudge, E-Learning URL` and free text. The `JLMS Course` learning type may also be available if you have configured the optional LMS integration feature.

Administrator users can create learning items and assign them to DNA components. Once DNA data for users is available, administrators can assign related learning items based on their performance. Assigned learning items are then added to the users' development plans and are visible from the `My Development` page.

Creating Learning Items

To create new a new learning item, browse to Learning Items page and click the `Create Learning Item` link. The following popup form will ask you to specify the type of item that you wish to create.

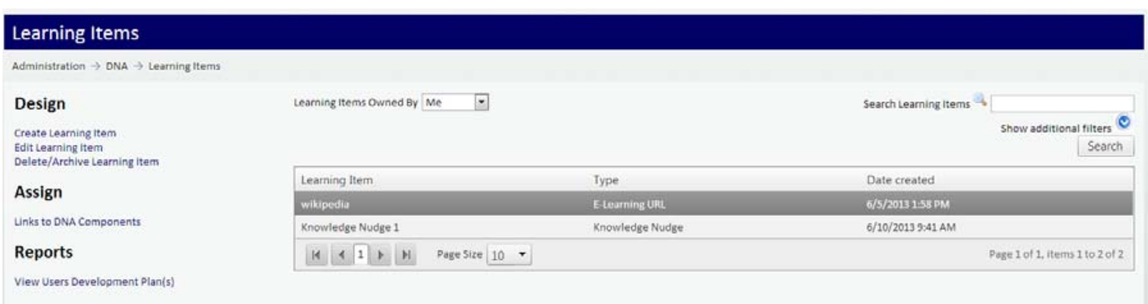


Figure 79: Learning Items Page

If you opt for an assessment or knowledge nudge, the following screen will require you to specify which assessment you wish to set as the learning item.

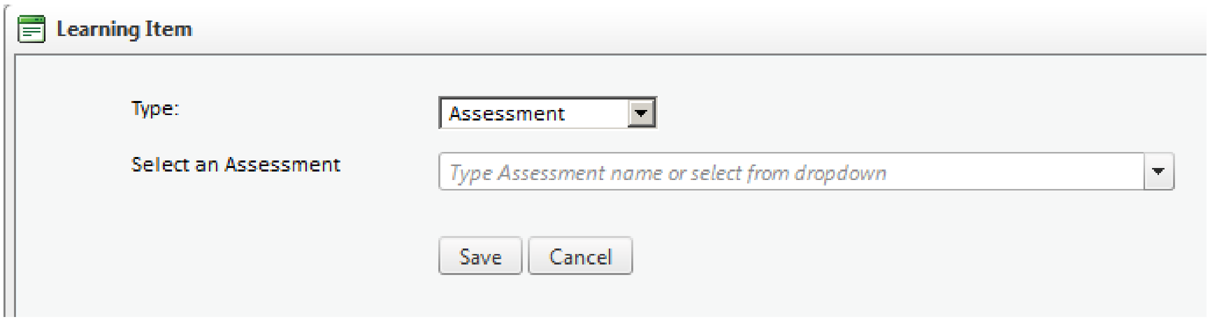


Figure 80: Creating Learning Items

If you choose to create an E-Learning URL, you will be required to enter a title and URL for the new item. The URL must start with either ‘http://’ or ‘https://’. Similarly, if you choose to create a free text learning item, you will be required to enter a title for the item and the associated text.

If you choose to create a new JLMS Course learning item, select the `JLMS Course` option from the `Type` select box. Three additional dropdowns will appear allowing you to select a category, curriculum and a course. It is necessary to select these items in order, i.e. category first, then curriculum and, finally, a course. However, once you set a category, the curriculum select box will become optional.

JLMS learning items can be assigned to users in the same way as other learning item types.

Note: the option to create a JLMS course learning item will only be available if the user who is logged in is mapped to a valid JLMS user (via the user field defined for the LMS integration feature). Similarly, JLMS course learning items can only be assigned to valid JLMS users.

Editing Learning Items

To edit a learning item, browse to the Learning Items page. Select a learning item from the table and click the `Edit Learning Item` link. A popup form will appear that will include the item’s current settings. You can then edit these settings before clicking **save** to apply the changes.

Deleting Learning Items

To delete a learning item, browse to the Learning Items page. Select a learning item from the table and click the `Delete/Archive Learning Item link`. Attempting to delete a learning item that is associated with a DNA component or assigned to users will cause it to be archived, otherwise it will be deleted.

Filtering View of Learning Items

Skills Assessor supports a range of options of filtering the display of learning, including restricting the items shown based on the user who created them (either all users or the currently logged in user options are available), by date created and whether the items to be displayed are archived or not. It is also possible to search for a specific learning item by entering a set of keywords in the `Search Learning Items` text box and clicking the `Search` button.

Assigning Learning Items to DNA Components

To assign a learning item to a DNA component, browse to the Components page. Select a DNA component and click its `Edit` link. A popup form will appear. Click the `Learning Items` tab. The Learning Items tab allows for the association of learning items with DNA components, its priority and the value range at which the learning item will be available for assigning to users. To assign a learning item to a DNA component, click the `Available Learning Items` select box, select a learning item, then click the `Add` button. Double click on an associated learning item to edit its priority and ranges. The `Manual Priority` text box defines the relative priority of this learning item in relation to other items associated with the same DNA component. A learning item with a priority value of 1 will appear before an item with priority of 10.

The `Auto Priority` field is populated by running the `Learning Item Auto-Ranking` application. By default the application requires a minimum number of 50 data points for KPI scores and assessment results (for matching users) before it produces a rank for the component-learning item association. The stronger the correlation result between a DNA component and its associated learning items the higher the ranking (starting with '1'). Weak (below 40%) and negative correlation results will leave the learning items un-ranked.

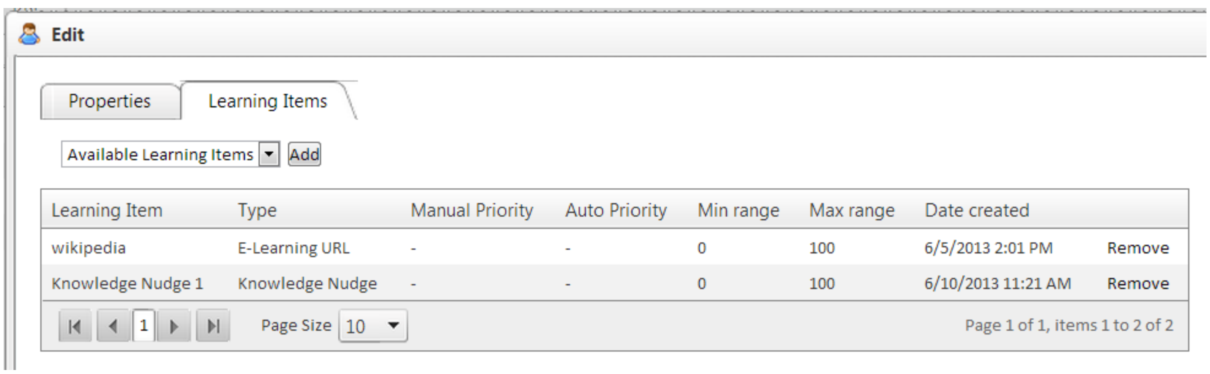


Figure 81: Assigning Learning Items to DNA Components

The learning item can also be associated with a specific range of component values. This range will determine whether the learning item is displayed as 'Recommended', 'Extended' or 'Core'. Learning items will appear as 'Recommended' if the user's value for the associated DNA component lies within the range assigned to the learning item. Items will appear as 'Core' if the user's DNA component score is lower than the learning item's range. If the user's DNA component score is above the learning item range, the item will be displayed as an 'Extended' item.

If more than one learning item is linked with a DNA component the learning item that falls into the `Recommended` group takes priority over `extended` learning items. Similarly, `Extended` learning items take priority over `Core` learning items.

Learning items' ranges can be defined manually by setting the minimum and maximum range values. Alternatively, the range can be set to match one of the associated DNA component's ranges, i.e. Red, Amber or Green ranges, by selecting one of these options from the `Preset Ranges to` select box.

Note: If the learning item range is set to match one of the RAG (Red/Amber/Green) ranges of the associated DNA component, this range will not be kept up-to-date if the component's RAG ranges change.

Manually Assigning learning Items to Users

Once you have created DNA components and blocks, assigned learning items to the DNA components and imported some DNA data, it will be possible to assign learning items to users based on their DNA values. To do this, browse to the `View Filtered DNA` page and select a user from the hierarchy. A table will appear showing the user's details. Click the `Assign Learning Items` button. A popup form will appear listing the learning items that are linked to the user's pre-defined DNA blocks. The displayed learning items will be divided into 3 groups: `Recommended, Extended` and `Core`.

Once you have selected the learning items you wish to assign to the user and, (optionally) assigned a date range for which the learning item will be available, click the `Assign and View User's Report` button. This will cause a PDF file download which will contain the user's development plan. The selected user will also have the newly added learning items assigned to them. These will be visible on the `My Development` page in the `My Development Plan` tab.

Automatically Assigning Learning Items to DNA Components

It is possible to automatically assign learning items to users if they fall in their 'recommended' range via the `Learning Item Auto-Assignment` application. This application checks which DNA job roles are associated with which users and assigns any learning items linked to the DNA to the users if they are in the 'recommended' range.

Note: Assigning learning items via the View Filtered DNA page creates a new development plan for users which is accessible via their My Development page. As a result, all learning item types are supported when manually assigning them via the View Filtered DNA page. The auto-assignment learning item application, however, does not create development plans for users when it assigns learning items. As a result, only Skills Assessor assessment (via Skills Assessor) and JLMS course (via JLMS) learning items will be visible to users.

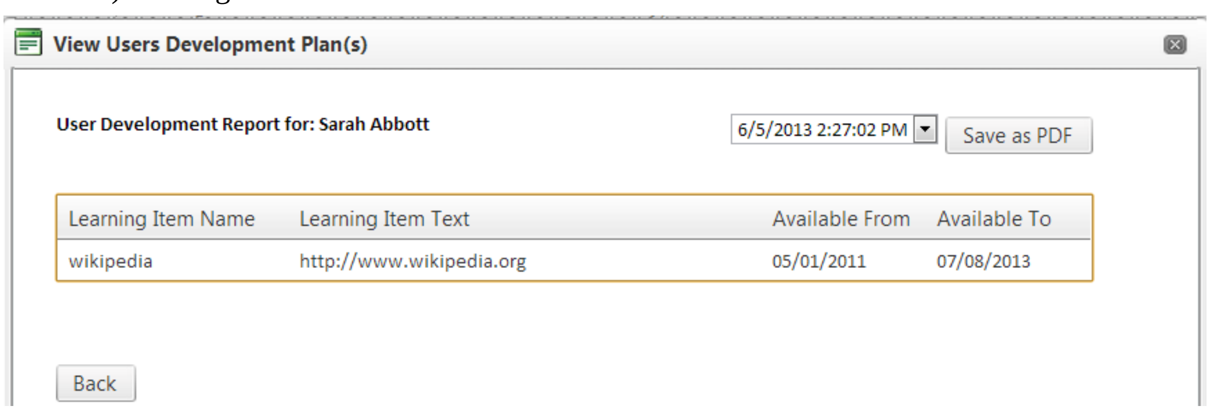


Figure 82: Viewing User Development Plans

Note: from version 8.1.125 onwards, assigning learning items causes previously assigned learning items to be removed from the user's learning plan. It is possible to view previous learning plans from the Learning Items page by clicking the `View Users Development Plan(s)` link. A popup form will appear. Click the `View` link for the chosen user to view their development plans. The dropdown box in the top right of the form will include all previous development plans which will then be displayed in the form's table and can be saved as PDF files.

Creating Feedback Assessments

When creating a feedback assessment, create the assessment in the normal way but select `Is this a Feedback Only Assessment?` The option is then available to create the assessment for `Self` or `Self and Manager`.

Where the assessment has been created for `Self` and `Manager` the manager will automatically be assigned the assessment to complete on the user, based on the hierarchy.

If the feedback assessment has been set to 'self and manager' an additional checkbox (labelled `Only require user feedback before combined test?`) will appear. Enabling this checkbox will prevent the manager from seeing the feedback assessment until the user has completed it. Once the user's feedback is complete, the manager will get the option to create a combined feedback assessment without completing their own version of the feedback assessment first.

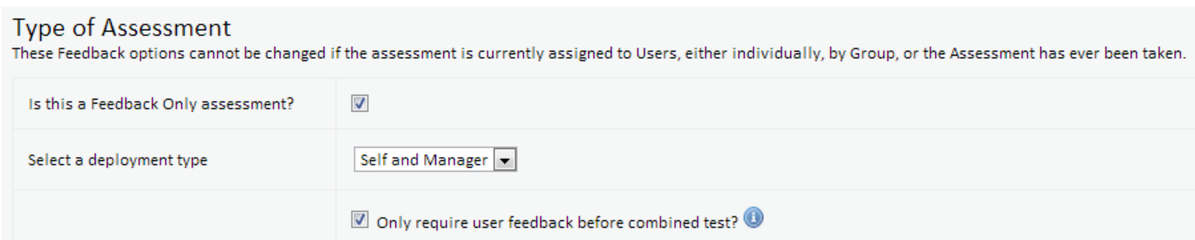


Figure 83: Self and manager feedback assessments

The user will see the assessment in their list of assessments to take and the manager will see a separate tab identifying that they have a feedback assessment to complete. See the example below.

After selecting `the Feedback on other users` tab, the assessment will be presented.

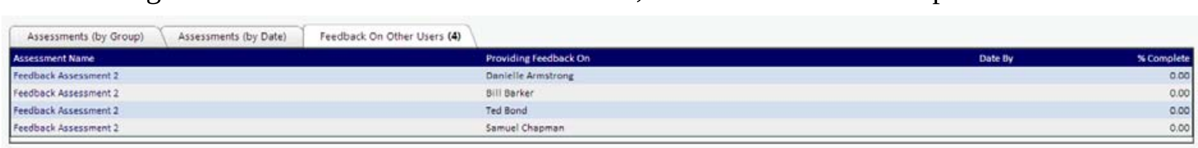


Figure 84: Viewing assessments using the 'feedback on other users' tab

Once the manager has completed their feedback assessment on the individual this will then be removed from the `Feedback on other users` list.

Email Notification Service

It is possible to set Skills Assessor to automatically send an email notification to managers when their subordinates have completed a 'self & manager' feedback assessment. This optional feature is enabled via the Email Notification Service. Please see the 'Assessment Messaging Service Installation Guide' document for instructions relating to the installation and configuration of this service.

Assigning Assessments to Individual Users

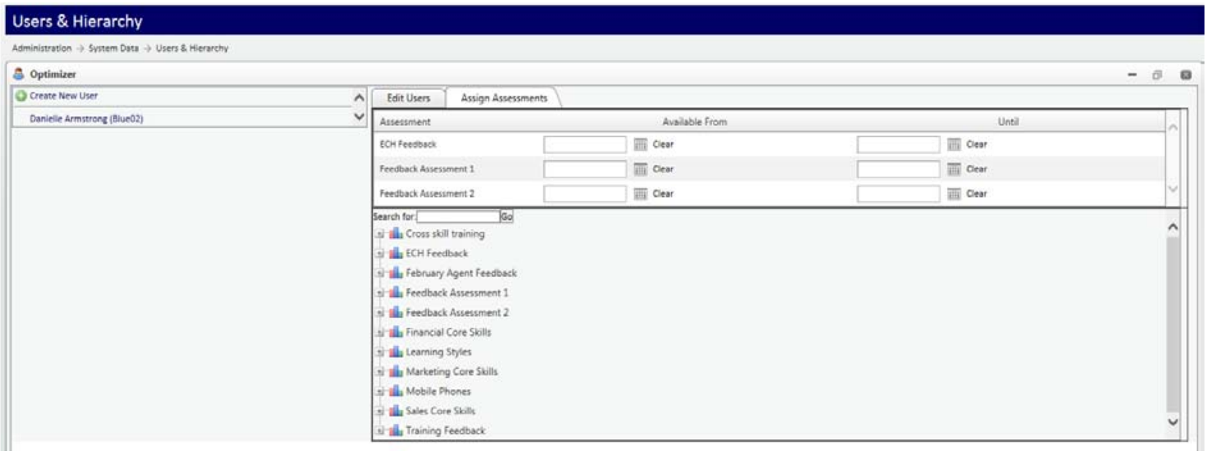


Figure 85: Assigning assessments to individual users

The option to assign an assessment to an individual is available in the user detail window. After selecting the individual user click on `Assign Assessments`.

The assessments are then available in the assessment window to select and assign to the user. Click on the required assessment and select `Add assessment to user`.

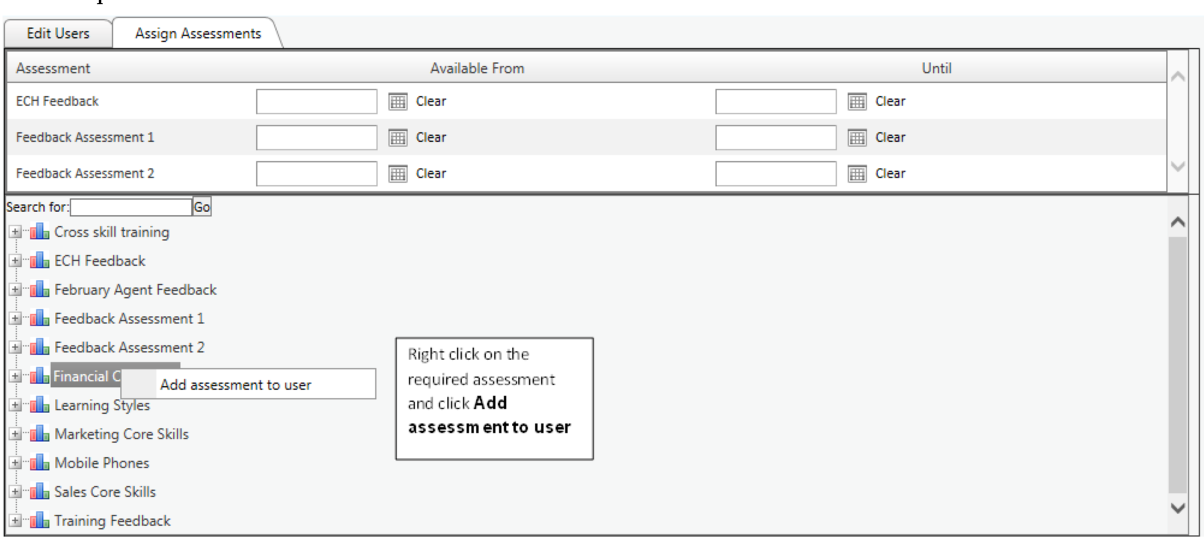


Figure 86: Assigning assessments to individual users

The individually assigned assessment will be visible under `individually assigned assessments` in the `My Development` screen of the individual.

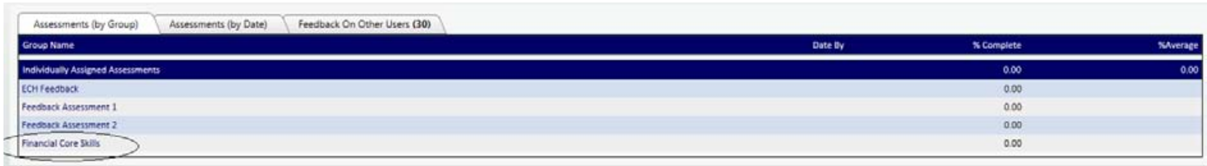


Figure 87: Viewing individually assigned assessments

Date Restrictions on Assessments

The `My Development` page displays the date that an assessment needs to be completed by (providing it has been configured as part of it being assigned to the user).

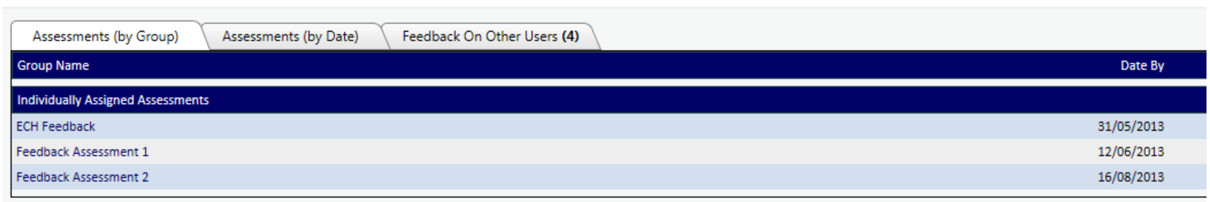


Figure 88: Deadline assessment dates

If a user attempts to launch an assessment before the start date they will be presented with a message indicating that the assessment cannot be launched.

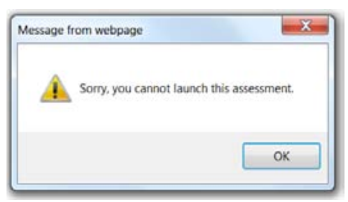


Figure 89: Date restrictions on launching assessments

Ability to Reset Multiple User Tests

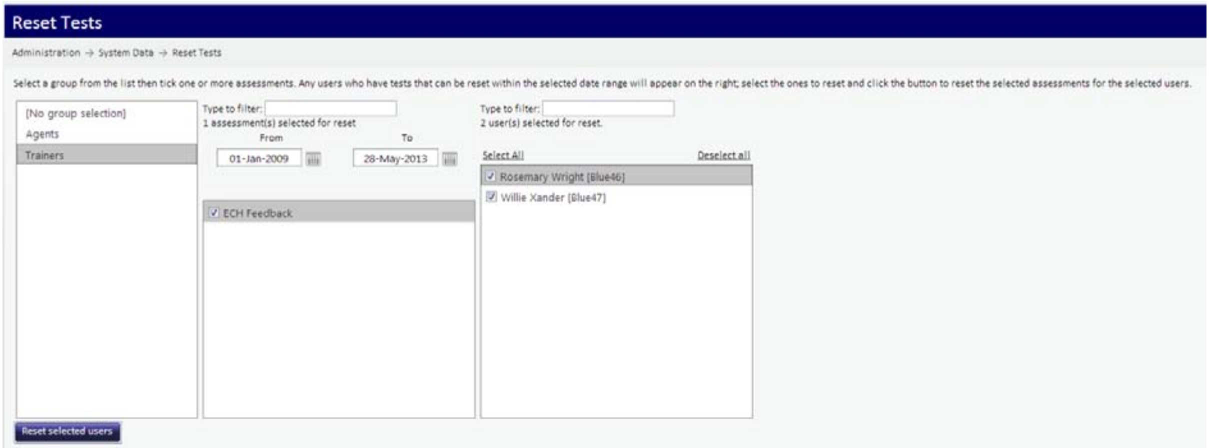


Figure 90: Resetting user assessments

There is a `Reset Tests` page for resetting user assessments (this page needs to be added to the relevant job roles).

There is the option to reset by group or for an individual. The Group names will appear at the left hand side with the option then of selecting the group or an individual within the group only.

The second column will then be populated with the titles of any assessments that have been taken. If this list is large you can apply a date filter by entering the date range.

N.B. The date range needs to include the dates when the users have taken the assessments.

A free text filter can be used to search for a specific assessment names.If you change any of the filtering criteria the list of assessments will update automatically.

Select the title of the assessment you wish to reset, multiple assessments can be selected at this stage if required. A third column will then appear showing the names of users who have taken the selected assessment as shown in the example**.**

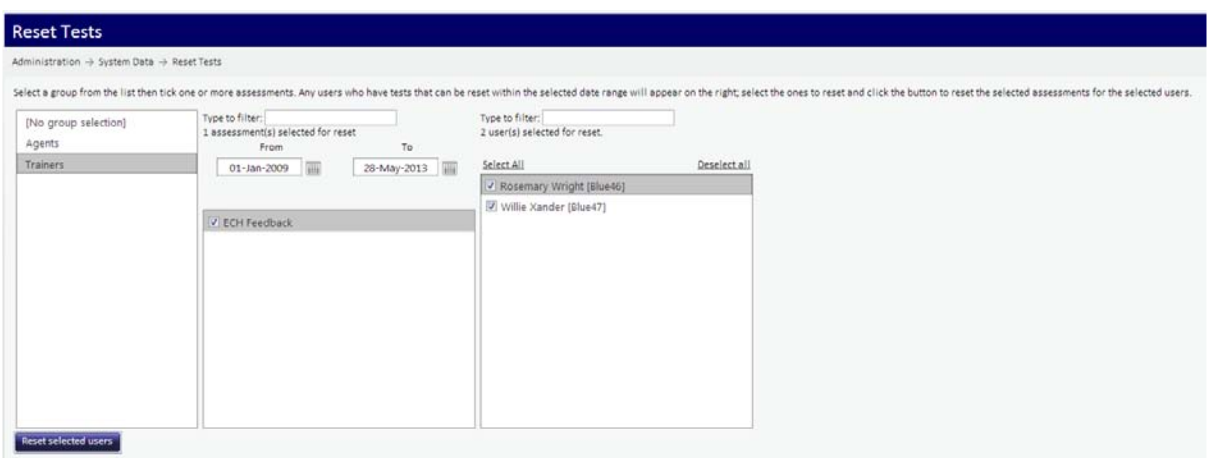


Figure 91: Resetting assessments for specific users

Select the names of any users you wish to reset then click the `Reset Selected Users` button. If there are a number of users shown you can use the filter to search for a particular user.

Create Customizable Certificates per Assessment

Creating Certificates

Select the certificates page. You will be presented with a list of any existing certificates (if any). Click the `click here` text in order to create a new assessment.

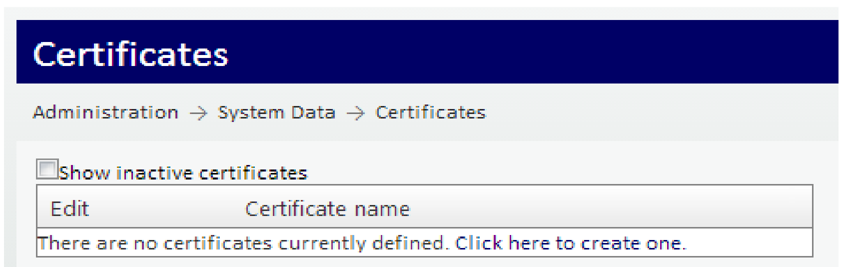


Figure 92: Creating new certificates

You will then be able to give your assessment a name. Enter a meaningfull name in the field provided. It is important that you name your certificate appropriatly as you will need to assign this to individual assessments at a later date.

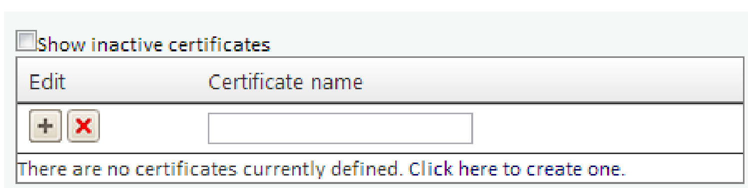


Figure 93: Setting certificate name

When you have entered your certificate name, click the plus icon to save the name change.

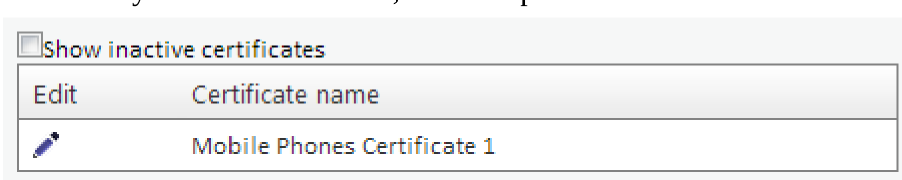


Figure 94: Saving certificate name

If you wish to rename your certificate click the icon and this will enable you to amend the certificate name.

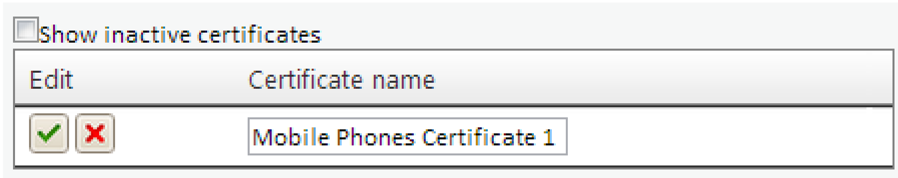


Figure 95: Confirming changes to certificate details

Click the icon to confirm your changes. If you wish to cancel your changes you can select the icon.

After creating a new certificate you will want to design the content within it. In order to do this, right click on the certificate name and select `Design` from the drop down options. You will notice that you can also create new certificates from this menu as well as rename them.

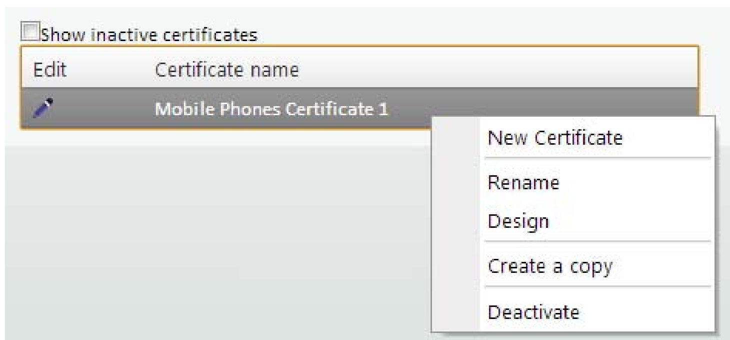


Figure 96: Designing certificate content

When you select `Design` you will be presented with a blank page containing the `toolbox`.

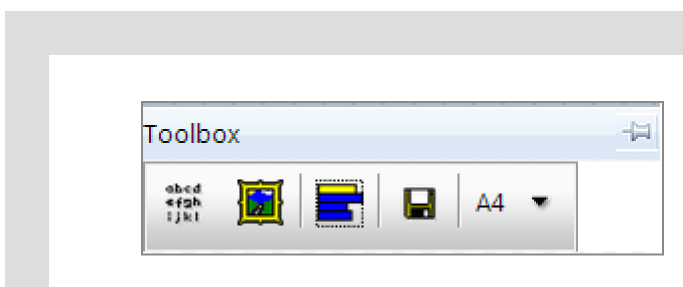


Figure 97: Designing certificate content

The white area within the grey border represents your certificate page. By clicking on the title bar of the `Toolbox` you can drag this around the screen in order to make it easier to see more of your page.

Items are added to your page by selecting them from the toolbox. Once selected they will be added to the top left hand corner of the screen and can then be dragged and resized into position.

Adding Text to a Certificate

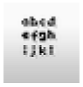


Figure 98: Certificate design toolbox

Click the text icon from the toolbox. This is the first icon as shown in the diagram above. Clicking this icon will add a new next box into the top left hand corner of the screen.

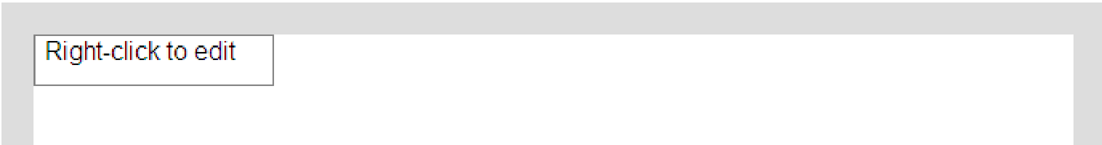


Figure 99: Adding text to a certificate

Right click the text as shown and you will be presented with a menu to edit the item.

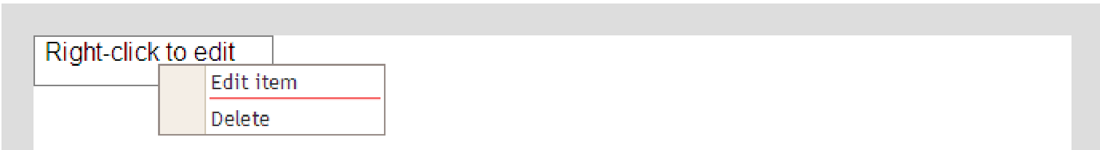


Figure 100: Text editing menu

Select `Edit Item` and you will have the ability to edit the text in the box.

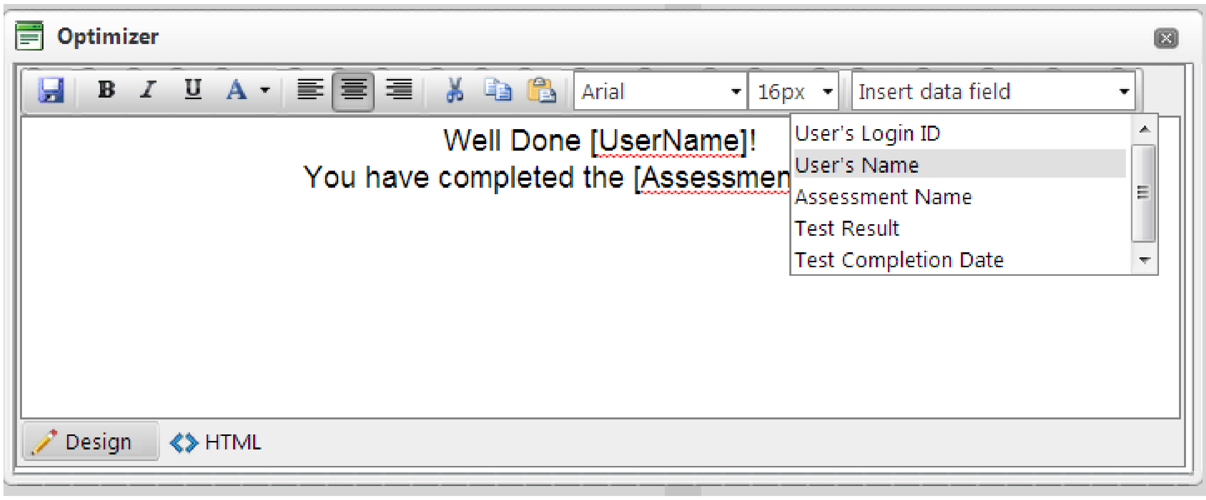


Figure 101: Editing certificate text

You can then use the text editing tools as normal such as Bold, Italic and Underline as well as change the font sizes and colors etc.

If you wish to add elements of dynamic text, such as the assessment or user's name, this can be selected from the `Insert data field` dropdown box, as per the example above. This will create an area for this information to be included wherever the cursor was positioned within the text box.

Once you are happy with your text press the  icon. This will add your text to the certificate. In most cases you will need to resize the box to accommodate your text. To do this click on the right hand corner of the text box (the icon will change to a double pointed arrow) and you can drag to resize.

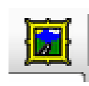
To move your text place your mouse pointer over the text box, click and you can drag it around the screen.

Remember to ensure your text box is large enough to accommodate any dynamic text that will be entered such as a user's full name or the name of an assessment.

Use the save icon within the tool box (1st icon) to regularly save your certificate. If any items such as text or images are outside the boundaries of the page these will be brought back into alignment automatically to ensure they fit the page.

You can add multiple text boxes within your certificate.

Adding an Image to a Certificate



Click the image icon, this is the 2nd icon within the toolbox. As before this will be added to the top left hand corner of your certificate. Right clicking it will open a menu allowing you to replace the image with one of your own or the ability to delete the image.

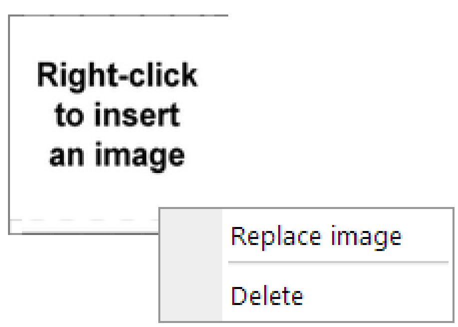


Figure 102: Replacing and deleting certificate images

Select `Replace image`.

This will open a dialogue box allowing you to locate an image on your computer to be included as part of the certificate.

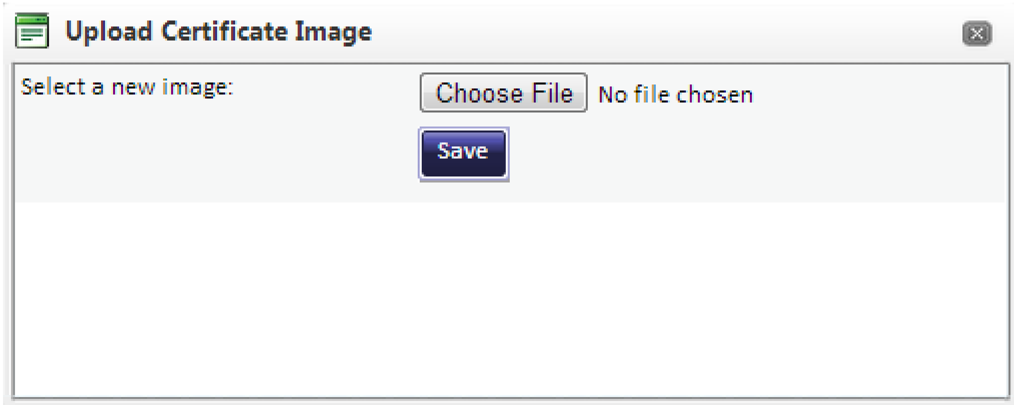
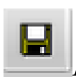


Figure 103: Browsing for replacement images

Once you have selected your image click `Save` and the certificate will be updated with the chosen image.

As before this will be in the top right hand corner and can be resized and moved into the appropriate position.

As you progress through the design of your certificate it is recommended that you use the Save icon to save any changes you make to your work. Should any items be placed outside the page size defined for your certificate you will be presented with a warning and the offending elements will be moved to within the page.

If you wish to add additional details of the user results then the third icon as shown will add a graph to your certificate. As with the previous items this will be added to the top left hand corner of the certificate and you can drag and resize this into the required position.

Right clicking this item however has a number of different options that you can select from. You can choose whether you wish the graph to show the achieved scores including the required pass mark. By default these will be available and simply select them to toggle whether they are visible within the certificate. If you wish to delete a chart then right click also provides you with the delete option.

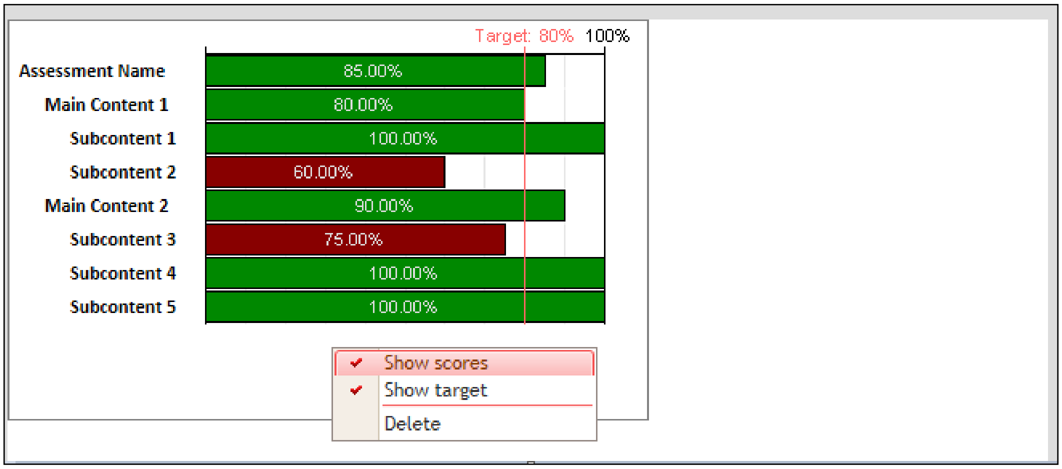


Figure 104: Adding a results graph to a certificate

Once you are satisfied with your certificate ensure that it is saved and then close down the designer window. By default your certificate is now available to be selected against any existing or new assessments.

If you would prefer to remove your certificate you can right click its name and select deactivate.

Assigning Certificates to Assessments

After you have created a certificate you can assign it to an assessment. In the assessment properties you will see the option together with the drop down menu to select the required certificate.

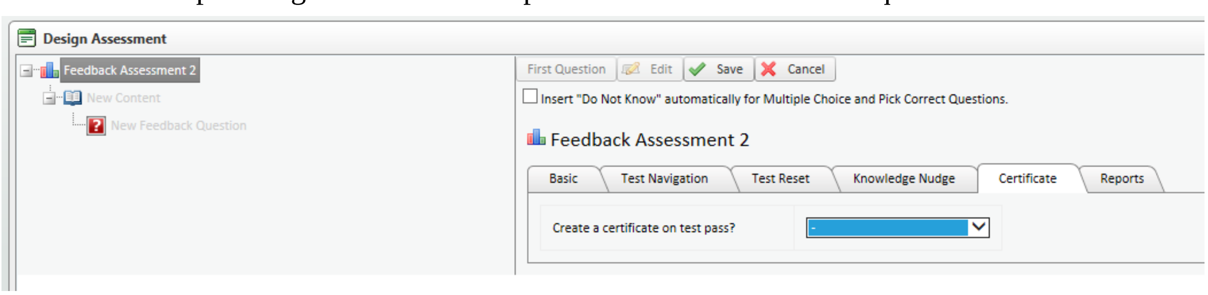


Figure 105: Assigning a certificate to an assessment

Remember to save any changes you make to the assessment properties as normal. If a certificate has been defined against an assessment this will be loaded automatically for the user to print when they have achieved the required pass mark.

This can be changed at any time by selecting a new certificate or the `No Certificate Selected` option. Should an assigned certificate become deactivated the certificate will no longer be presented to the user upon completion.

Recalling Awarded Certificates

If a user has achieved the required pass mark, the certficate will be presented automatically upon completion and can be printed off, if required, as a record of achievement. If a printer is not available or there is only a requirement to store it electronically, it will be saved within the `users Certificate` page for them to view at any time in the future.

In the `users Certificate` page there will be a list of assessments that the user has successfully completed. To view the certificate simply click on an assessment name and all of the associated certificates will be displayed along with the date and time they were awarded.

Click on the certificate to open it and a new window will open ready for printing.

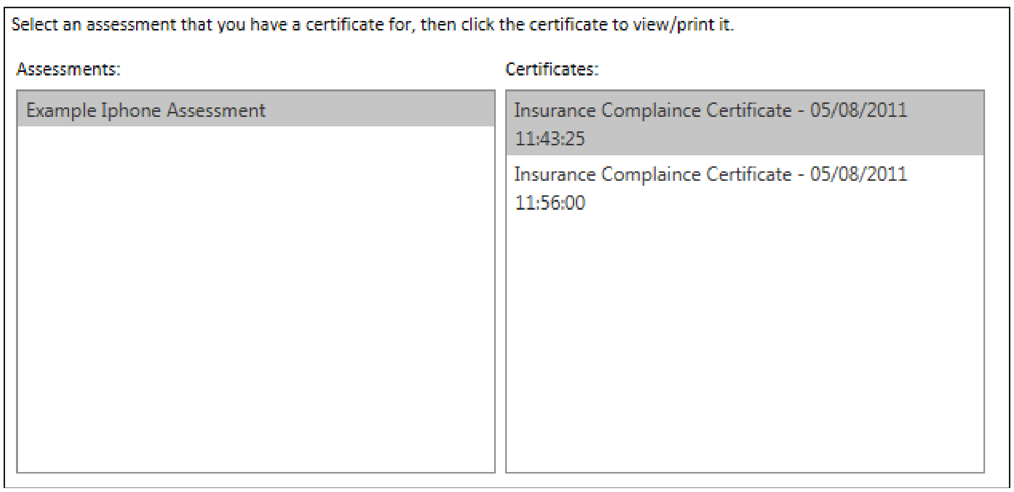


Figure 106: Viewing certificates

Reports

Knowledge Nudge Reports

Select the `Knowledge Nudge Report` (this may be in the Report page depending on how the application has been set up).

Click on the user and the available user information will depend on where the individual is situated in the hierarchy.

In this example the user has been selected by `selected position only` but users can be selected in the hierarchy.

After selecting the individual a list of the assessments where knowledge nudges have been accessed is presented in the bottom left hand window.

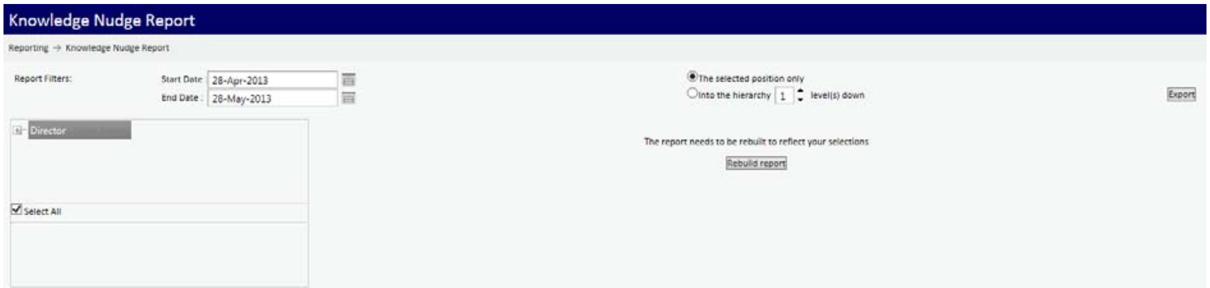


Figure 107: Knowledge nudge report

Click on `Rebuild Report` once the individual has been selected.

The information is then available to view and there are several options to select from.

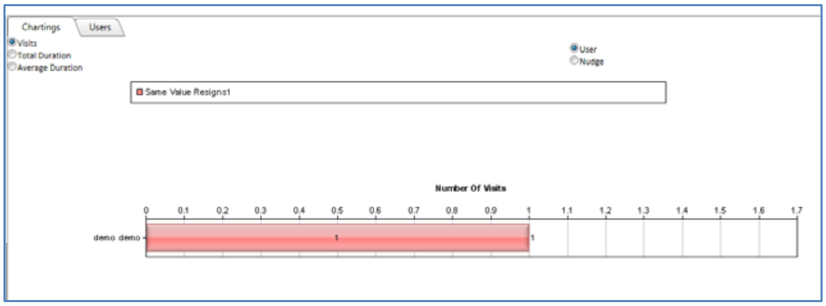


Figure 108: Nudge report information and options

Assessment Report

Select Reports to view the individual results or a team results based on the hierarchy.

Select the individual and the required date range.

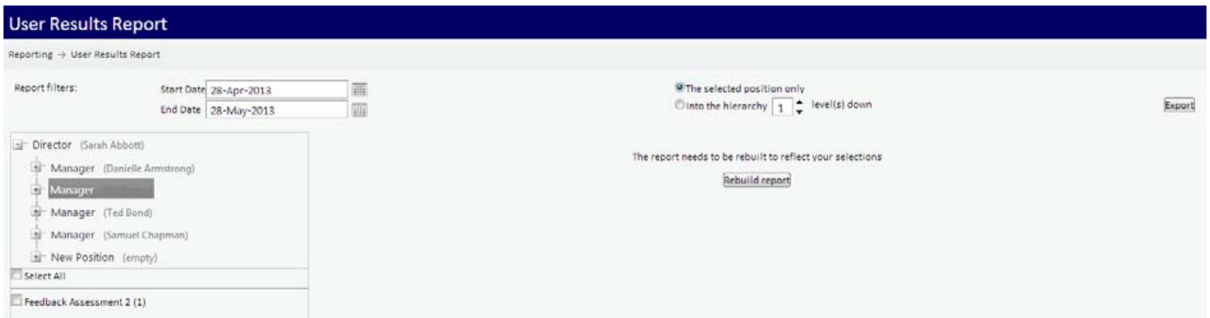


Figure 109: Viewing assessment reports by individual or team

Select the assessments from the bottom left hand window. These are all of the assessments that the individual has completed. Once selected, click on `Rebuild report` to view the results.

The results can be expanded by clicking on the Assessment name to reveal the Content level results. Click on the Content name to view the individual questions as per the example below.

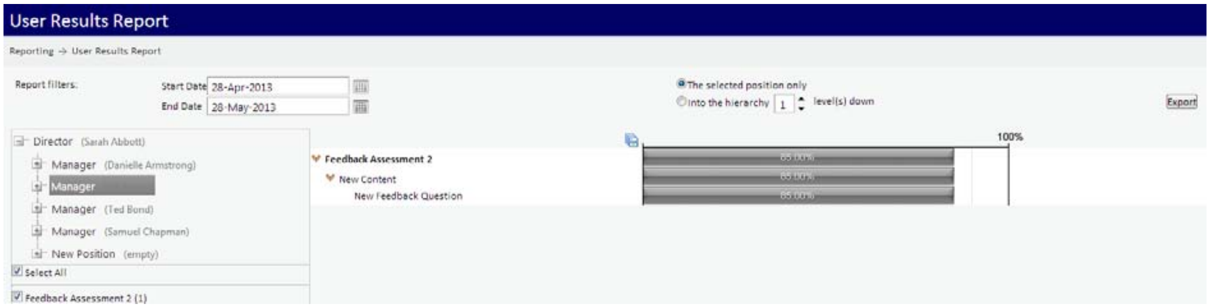


Figure 110: Detailed assessment results

By right clicking on a question the option to `View Detail` is presented.

Click on `View Detail` to reveal the answer given and the correct answer. Where a team has been selected, (x levels into the hierarchy) it will list all of the team with their respective answers.

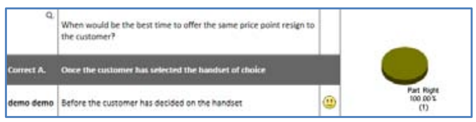


Figure 111: Viewing question detail and provided answers

The option to export the information into an Excel spreadsheet is also available by clicking on the `select for export` button and then click on `Export`.

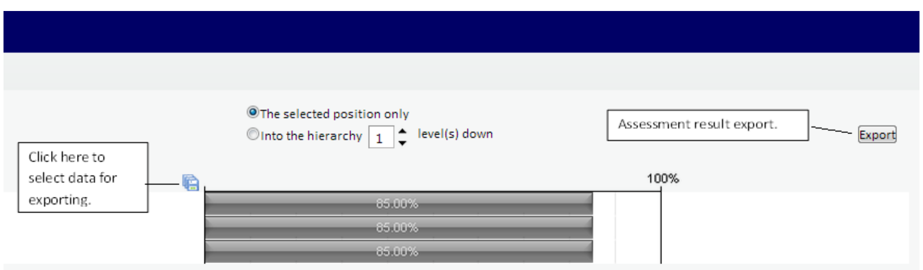


Figure 112: Exporting assessment details

Feedback Reports

Similar to the assessment report the users can be selected individually within the hierarchy structure. Using the date range this will display any feedback assessments that the individual has completed in the bottom left hand window. Select the specific assessment and click on `Rebuild report`.

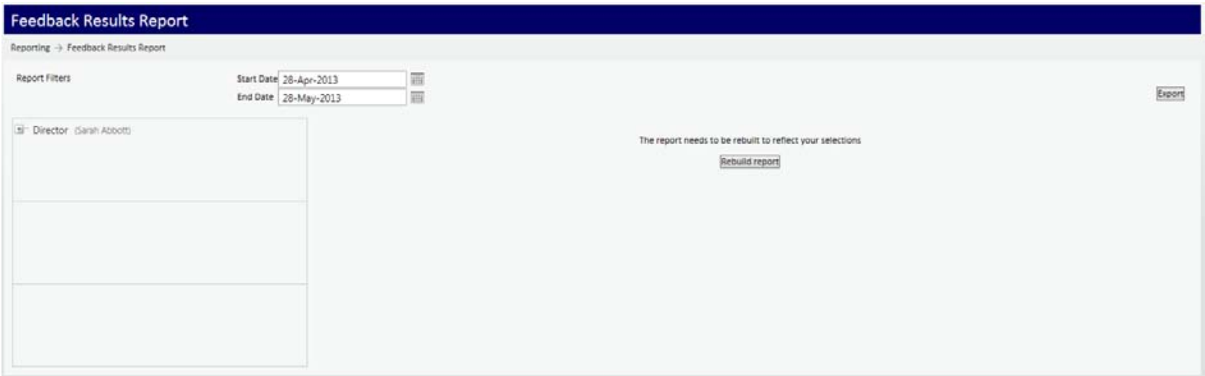


Figure 113: Rebuilding feedback reports

The information presented will display the user feedback together with the manager feedback depending on whether the assessment has been created as user and manager and if the manager has completed their feedback assessment.

The information is also available for exporting to an Excel spreadsheet by selecting `Export`. The Excel spreadsheet will contain the criteria used in the assessment.

Admin Reports

To access the Admin Reports select the Admin Reports page and a window will appear as per the example below.

There are 3 Admin Reports:

- User Result Detail
- User Feedback Response Percentages
- Question Response Summary

Reports can be generated without any filters, therefore presenting all of the associated detail.

User Result Detail

Select the required report at the bottom of the Admin Reports screen. Use the drop down box to select the required report. In this example the report selected is the `User Result Detail`.

Once the required report has been selected, click on `Create Report`.

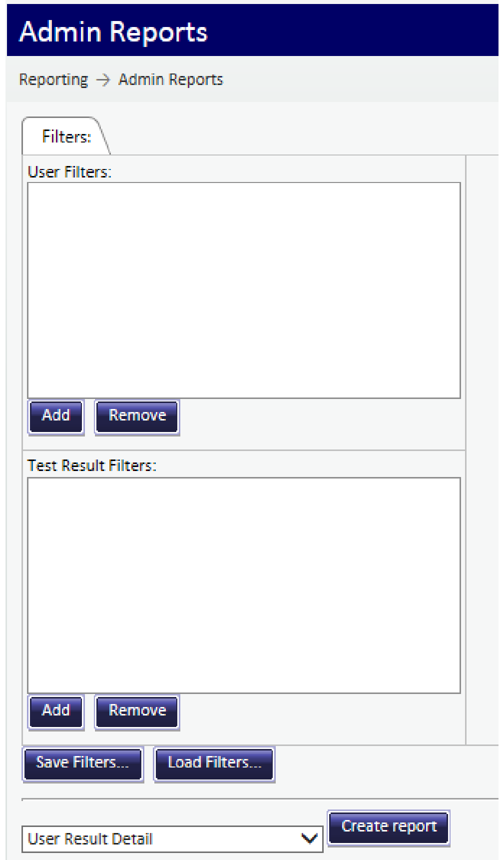


Figure 114: User result detail report

The report will then automatically appear at the top of the page next to the Filters tab.

Figure 115: User result detail report

After selecting the report the option is then available to select the specific assessment from the assessments available.

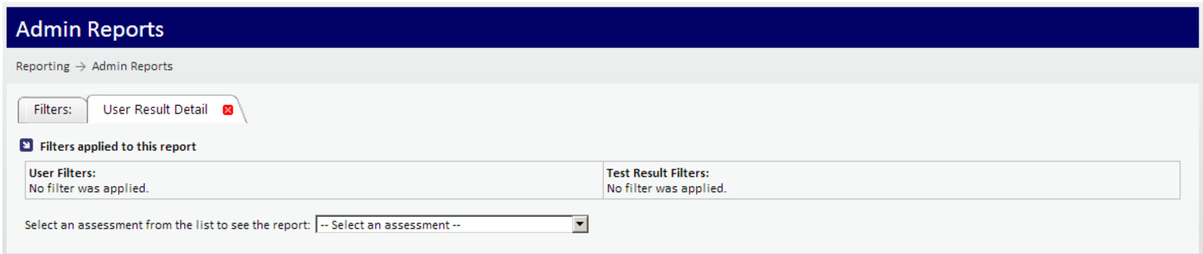


Figure 116: Selecting an assessment for the report

The data can then be expanded to Content and Question level with the option to Export into Excel. Click on the relevant buttons to expand the data.

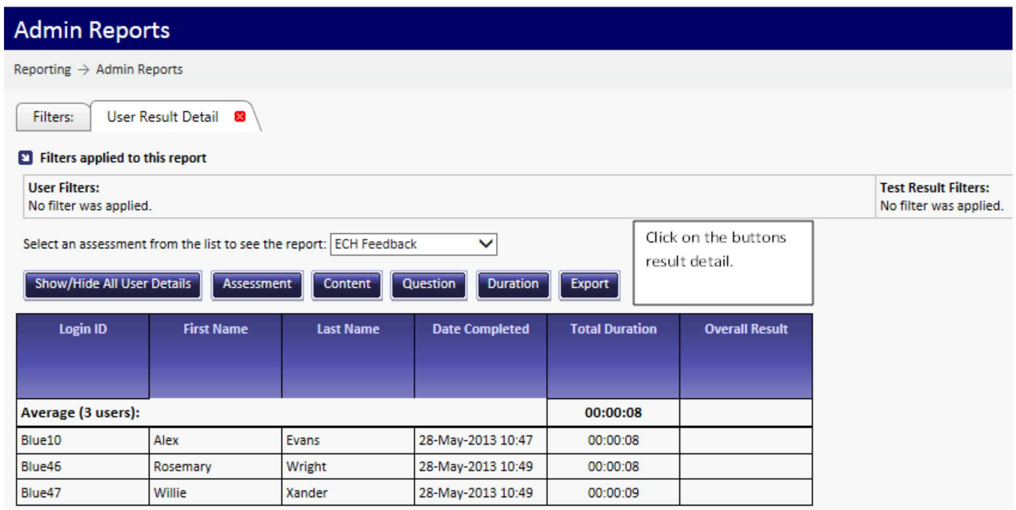


Figure 117: Expanding report detail

Clicking the 'Duration' button will show how long each user spent on each question in the assessment, as well as the total duration spent per content section.

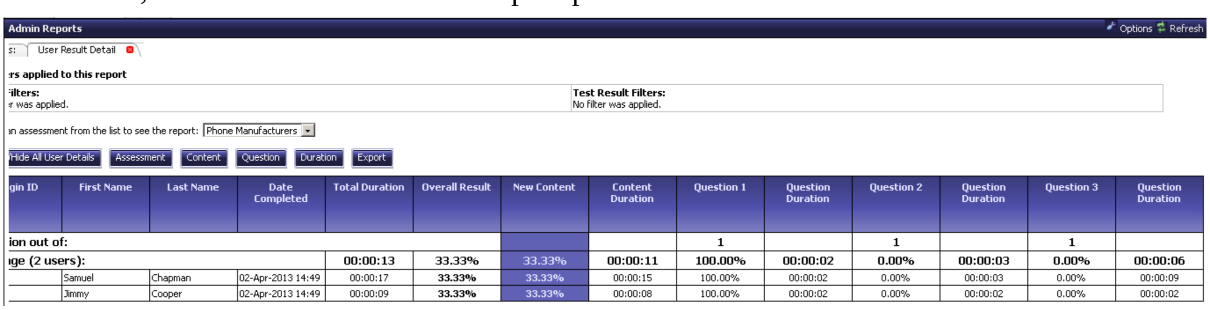


Figure 118: Question and content duration

Using the Report Filters Option

Filters can be created and saved by selecting `Add` which will then present the `Edit User Filters` as per the example below.

Use the drop down box to select the filter required. In the example below the options are – Hierarchy, User Field & Group.

Once the filter has been selected click on `Add Filter`.

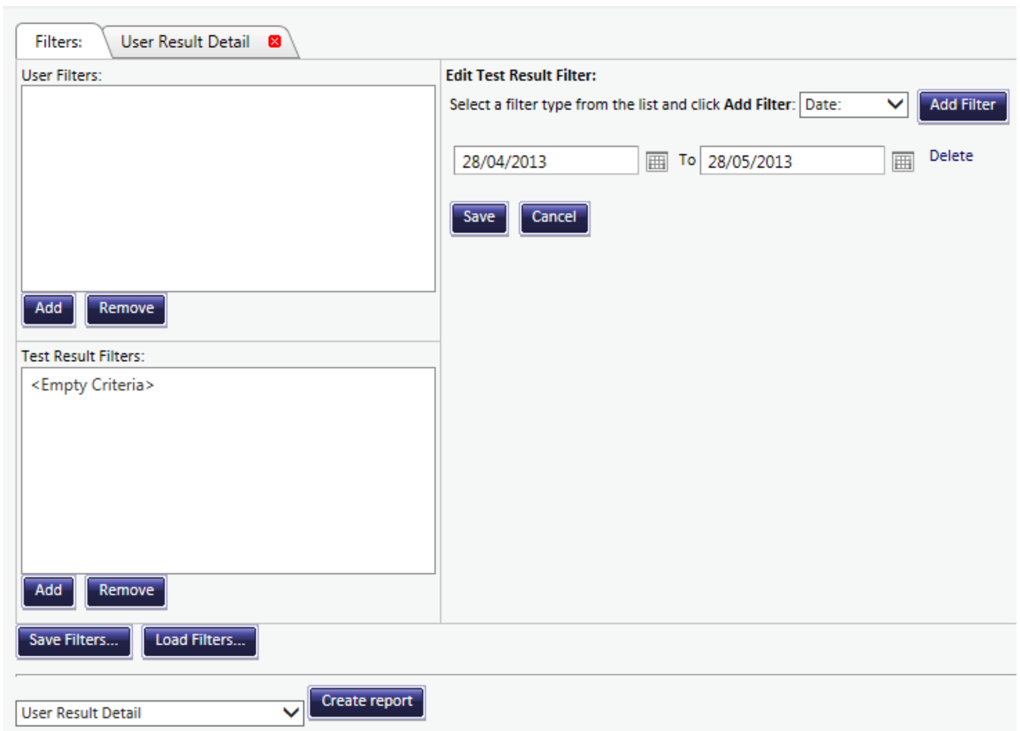


Figure 119: Using report filters

In the example below the filter added is the `User Field`, which then reveals the fields available.

Select the additional filter.

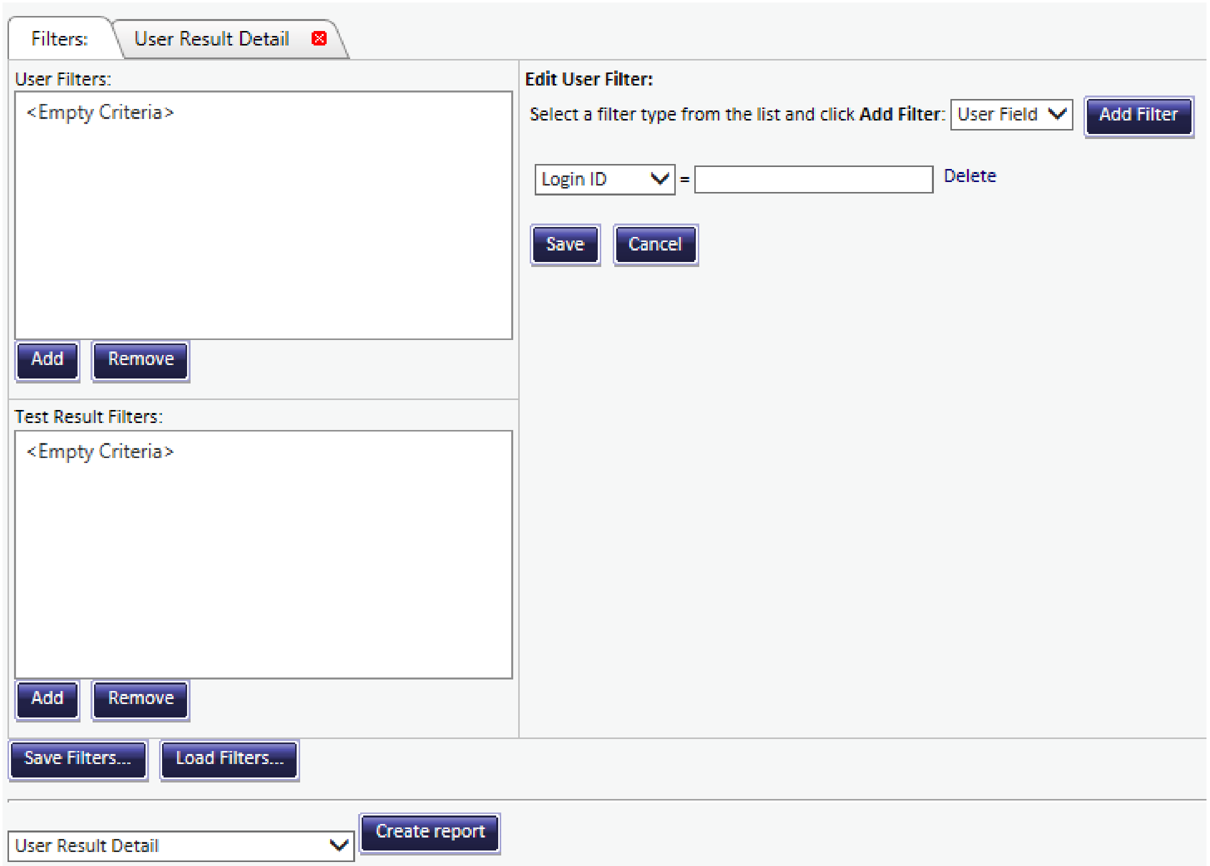


Figure 120: Adding additional filters

In the example below the field selected is Department and this is set to show results for ‘IT’. ‘IT’ has to be manually entered into the right hand box.

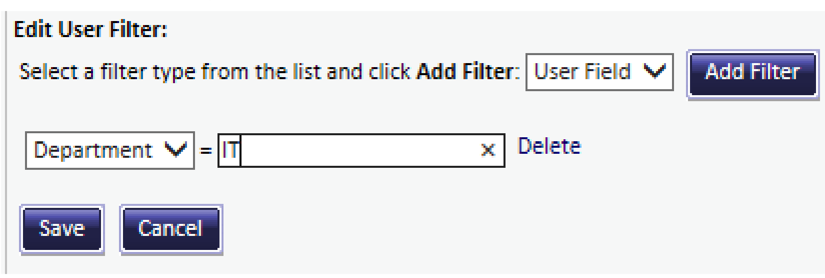


Figure 121: Adding a Department Filter

Once the filter has been created, this can be saved to use against any report selected. Click on `Save` which will then save the filter to be used as and when required in the `User Filters` box.

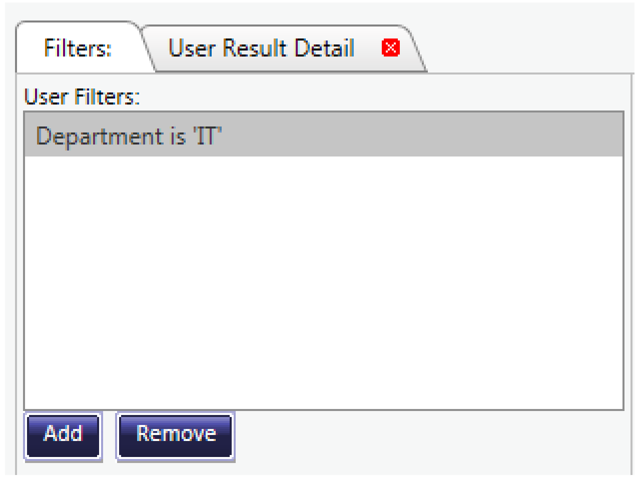


Figure 122: Saving filter options

There is also the option to create additional `Test Result Filters` in the same way as `Filters`. Click on the `Add` button under the `Test Result Filters` box.

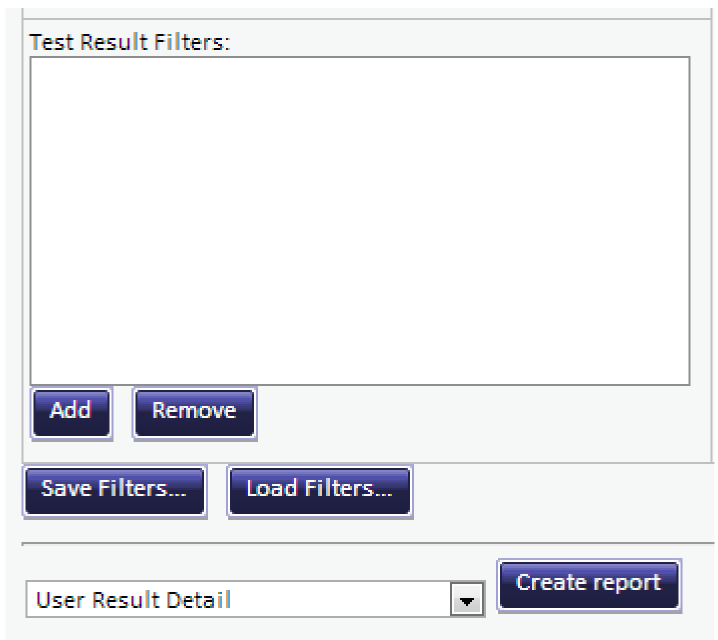


Figure 123: adding test result filters

The available filters are then visible in the drop down box. Once the filter has been selected, click on `Add filter`.

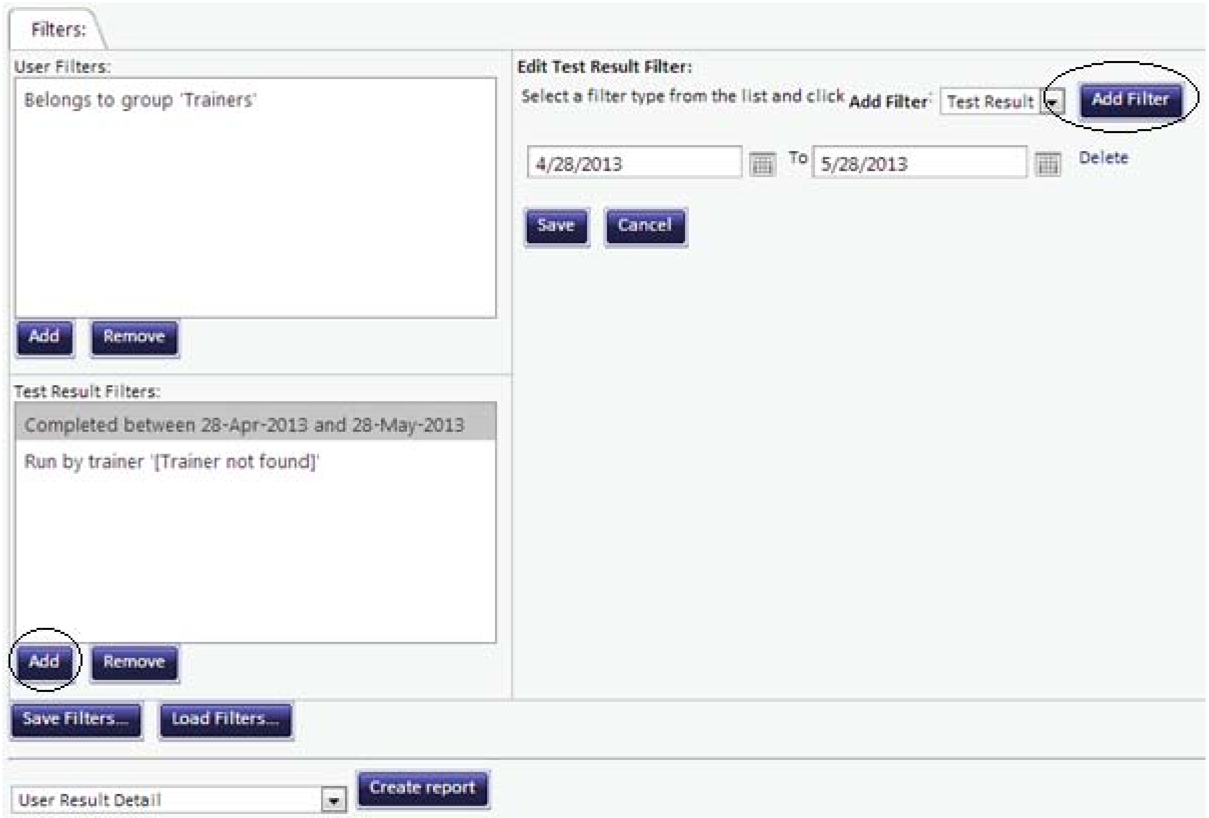


Figure 124: Selecting a test result filter

There are two available options in the `Edit Test Result Filter`:

`Test Result` filter as per the example below.

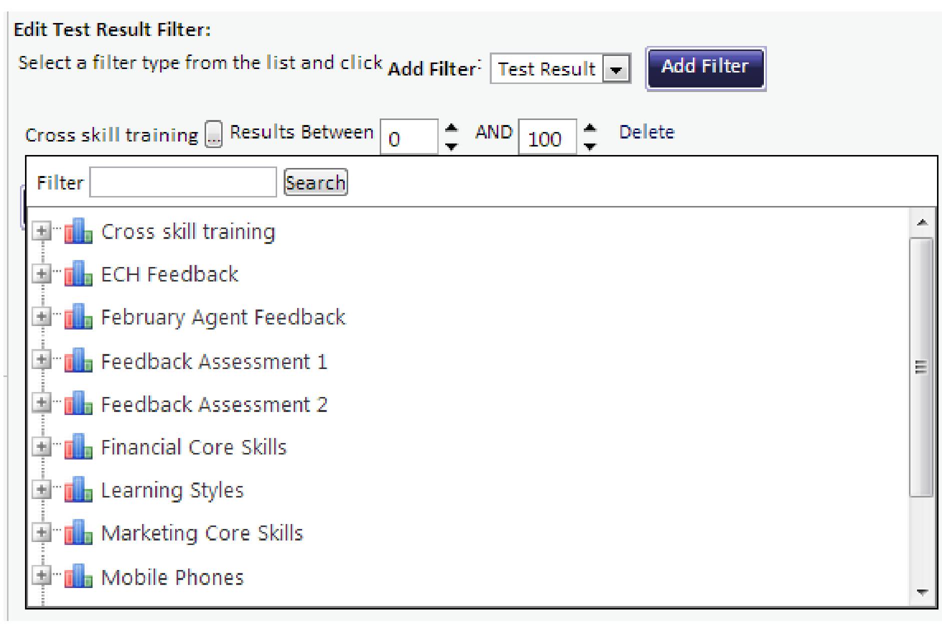


Figure 125: Test result filter options

There is also the option to save a specific assessment with the filter if this is a report that has to be created on a regular basis.

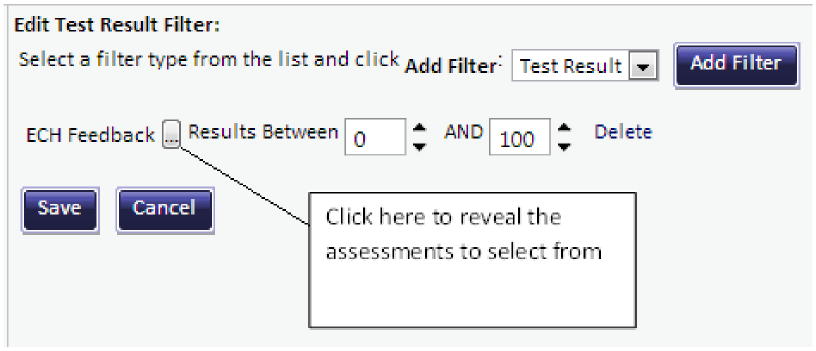


Figure 126: Saving an assessment with an associated filter

Once an assessment has been selected, this will save the details together with the results as a filter once `Save` has been selected.

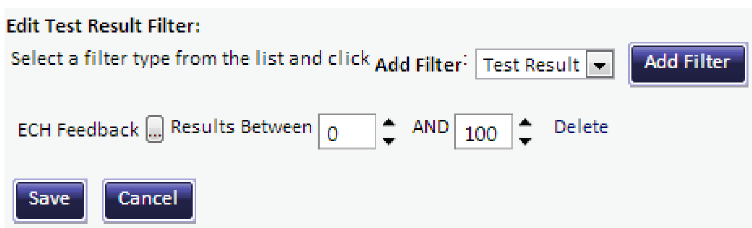


Figure 127: Saving an assessment with an associated filter

`Date` filter

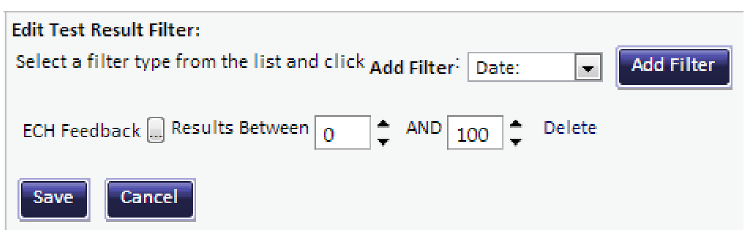


Figure 128: Saving the date filter

Once the filter has been saved it will appear in the `Test Result Filter` box.

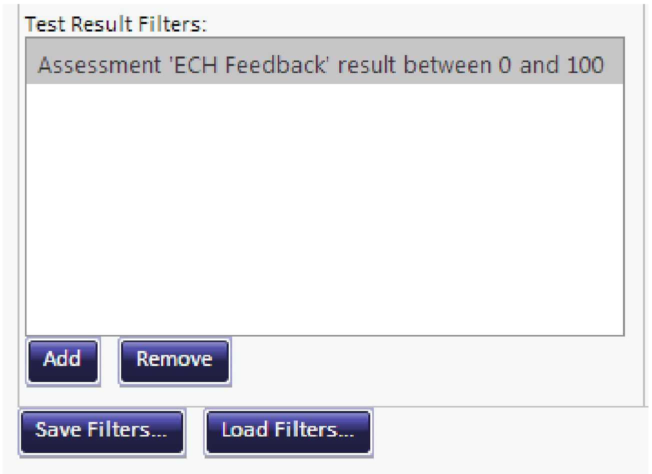


Figure 129: Display of a saved filter

To save the filter for future use, click on `Save Filters...` and give the filter a new name.

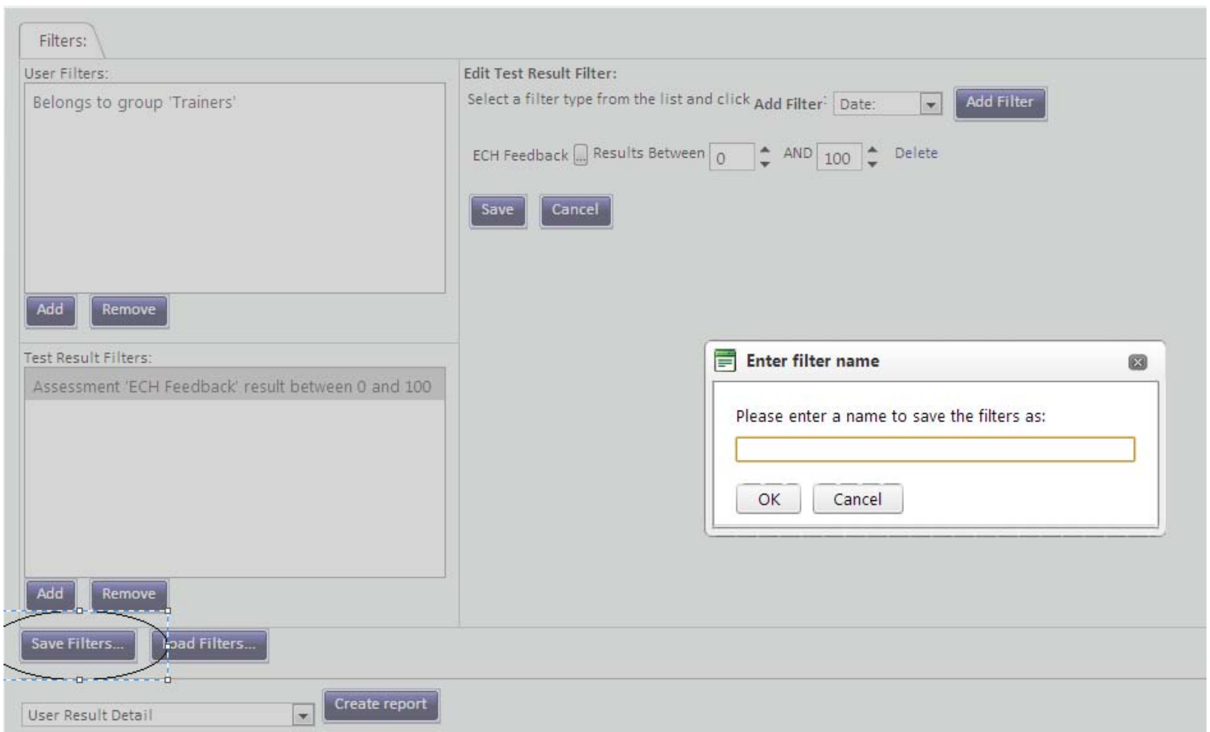


Figure 130: Saving filters

Notification given once the filter has been changed.

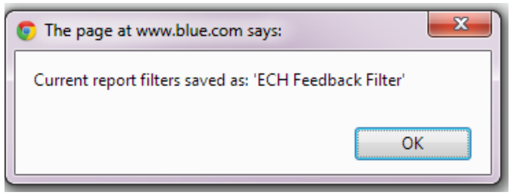


Figure 131: Filter update notification

Loading Report Filters

The filter is then available to select from by clicking on `Load Filters` and the available saved filters are presented. Highlight the required filter and then click on `Select`.

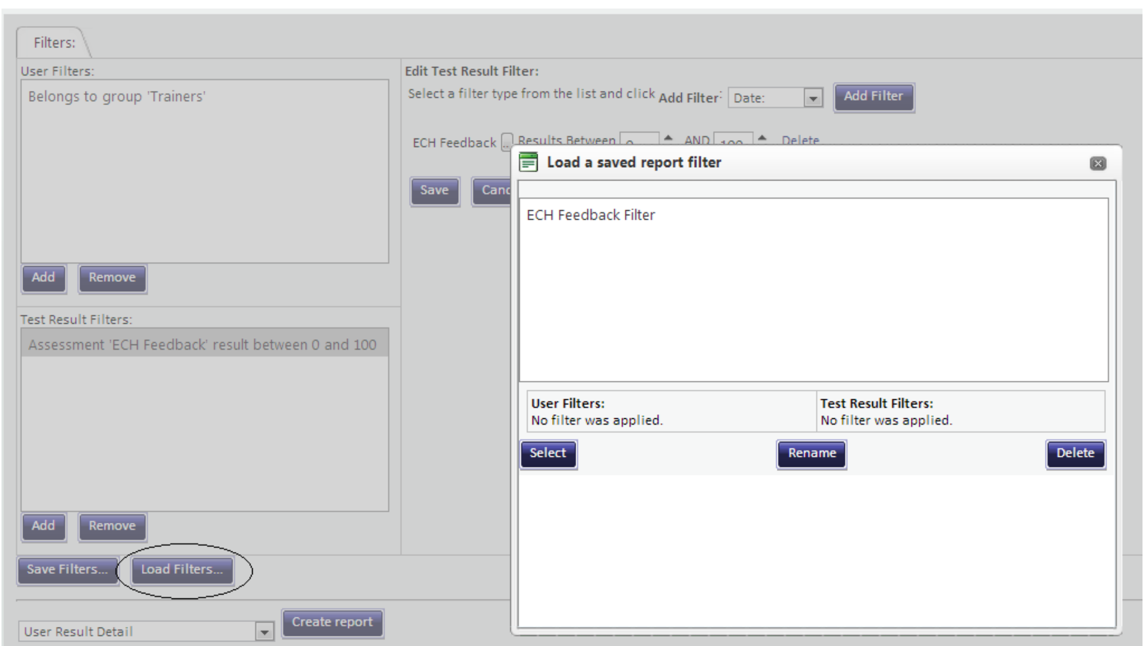


Figure 132: Loading saved filters

The filter then appears in the relevant filter box.

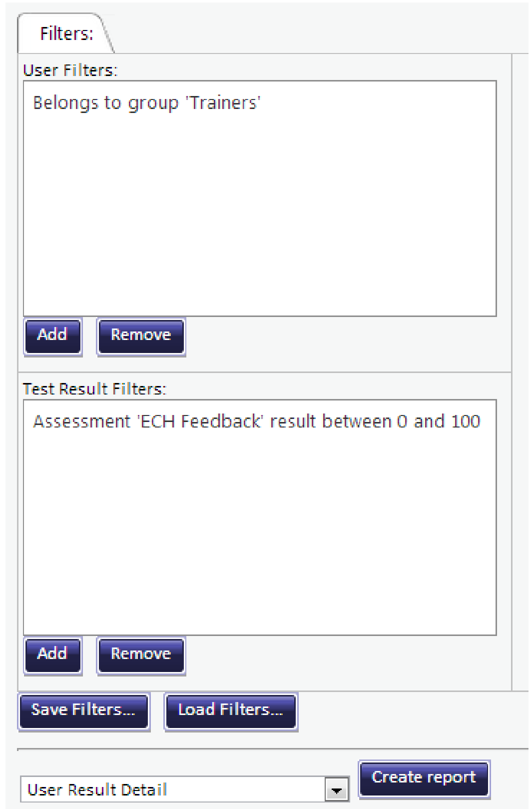


Figure 133: Display of selected filters

Select the report type e.g. `User Results Detail` and after clicking on the report at the top of the screen the filter information will then appear as part of the report selection.

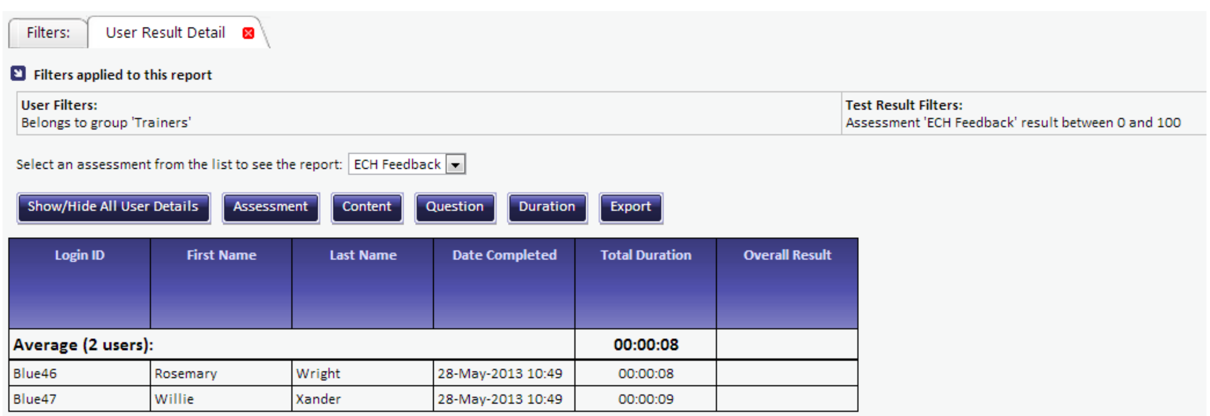


Figure 134: Viewing filtered report information

User Feedback Response Percentages

Select the `User feedback Response Percentages` report from the drop down box and select `Create Report`.

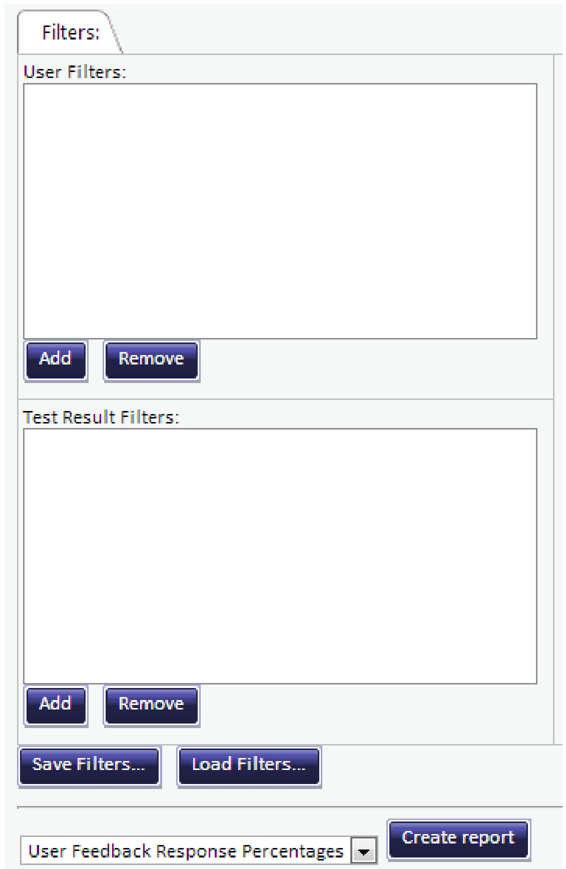


Figure 135: Creating a user feedback response percentages report

The report appears at the top next to the `Filters`.

Select the relevant assessment. There is also the option to select the type of feedback to view from a drop down box.

Figure 136: Selecting the report's assessment and feedback type

Question Response Summary

The Question Response Summary allows immediate visibility across an assessment for all of the results by question within an assessment (date filters could be used to reduce the volume of answers).

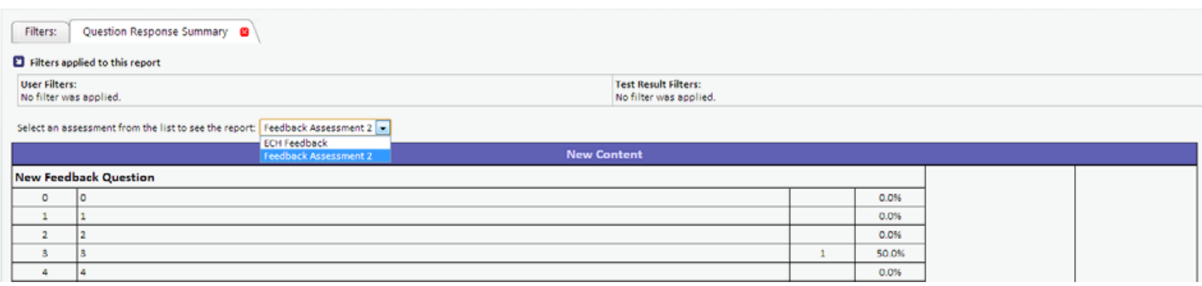


Figure 137: Selecting an assessment for the Question Response Summary Report

Admin Report User Filter-Hierarchy

You can use the organization hierarchy as a filter within the Admin report. Simply select the `Add Filter` button under the `Edit User Filter` section of the `Admin Reports` page.

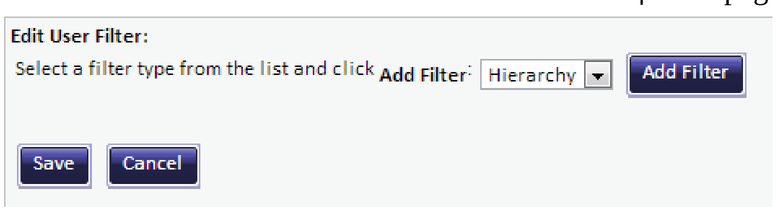


Figure 138: Using the organizational hierarchy as a filter

You will then be presented with a drop down as displayed in the example below:

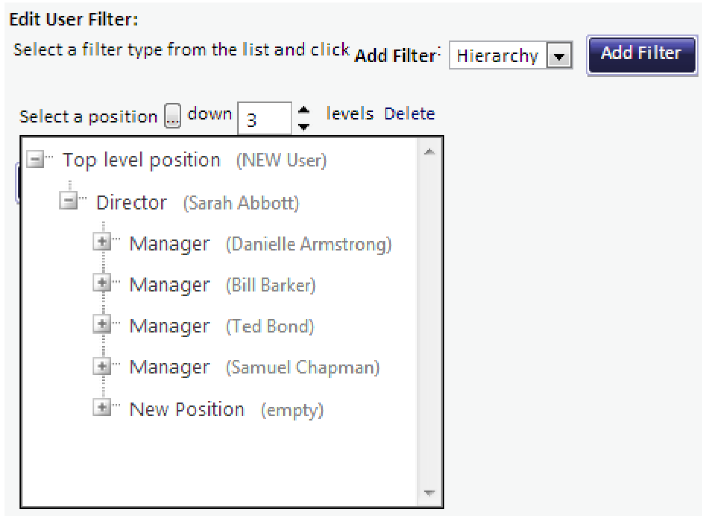


Figure 139: Using the organization hierarchy as a filter

The hierarchy will then be presented to either expand it as required and select the relevant nodes or select a specific position. To include any subordinates simply increase the number of `levels` as required.

Click on the `Save` button to apply the filter for reusing at a later date. To select and use an existing filter select `Load Filters` and click on the required filter or to remove a filter click on the filter name and after selecting it click on `Remove`.

Duration Column within the User Result Detail Report

Duration is included within the `User Result Detail` admin report together with the overall average duration of all users in the report.

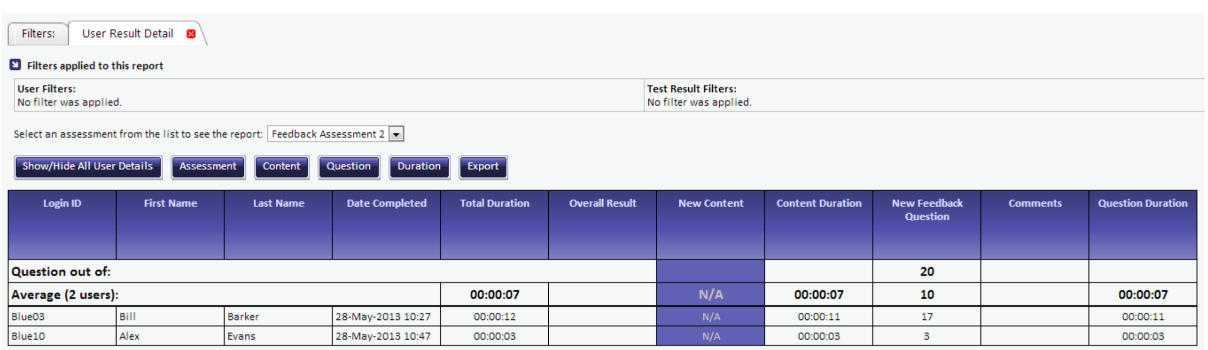


Figure 140: Duration column within the user result detail report

Feedback Deployment Models

This page allows the creation of feedback models for selection as part of the properties option for an assessment.

In the example below the standard feedback models are available.

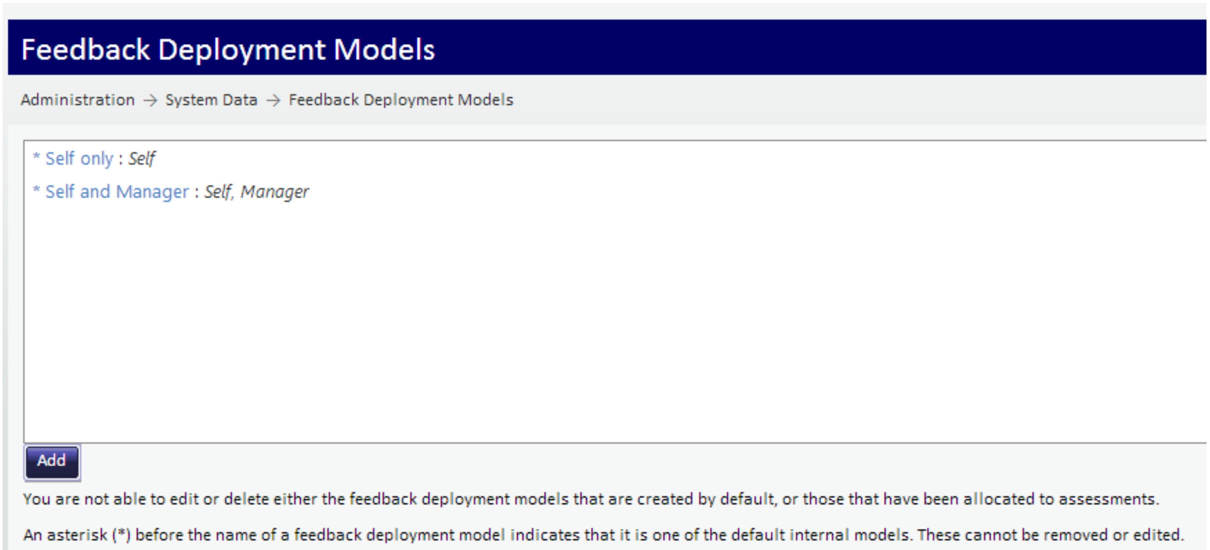


Figure 141: Feedback Deployment Models

To create a new feedback model for use in a feedback assessment, click on Add and additional options are available to select from to build another profile.

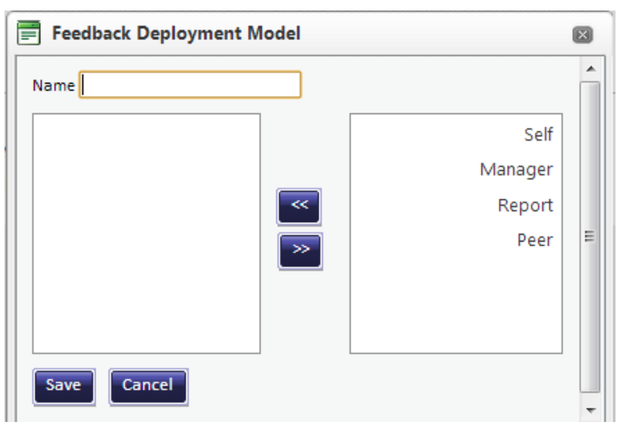


Figure 142: Creating feedback models

To create a new feedback model, select the required options and move them across to the left hand box.

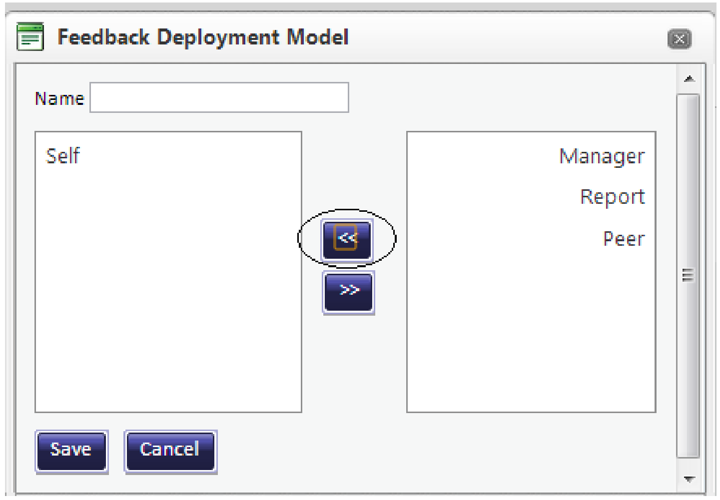


Figure 143: Selecting a feedback model

If Reports is selected, the number of Reports will be requested.

Enter the number of Reports and click on OK.

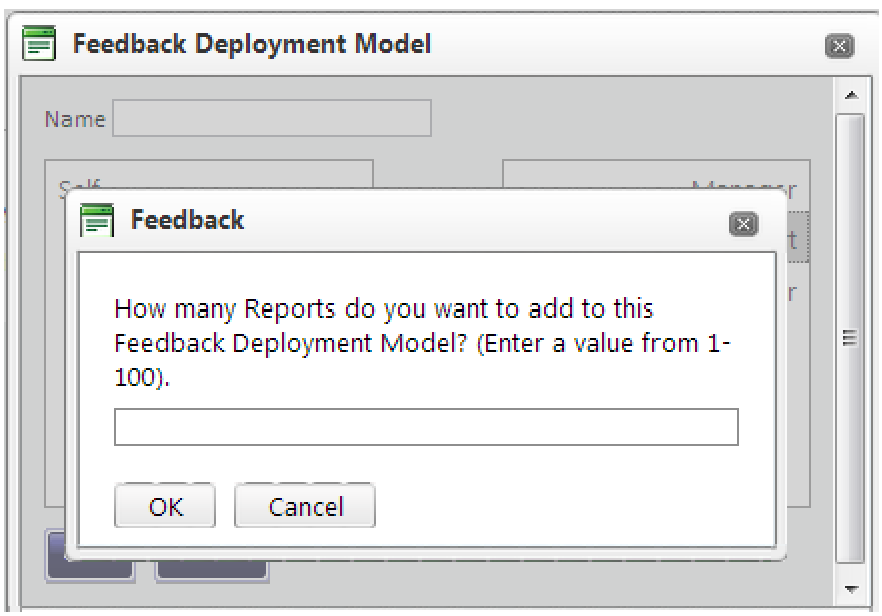


Figure 144: Setting the number of required reports

Once the new feedback model has been created click on Save for it to be available for selection against feedback assessments within the assessment properties.

Managing and Viewing Crystal Reports

Skills Assessor supports the importing and viewing of custom-designed Crystal Reports. The features associated with Crystal Reports are located in the Manage Reports, Report Categories and View Reports pages.

Note: The new Crystal Reports functionality is only supported for Internet Explorer version 8 or above and the latest versions of other browsers (e.g. Chrome, Firefox and Safari).

Managing Report Settings

The Manage Reports page allows users to create, edit, delete and re-arrange report categories. Reports can then be associated with specific categories.

To create a new category, first select the parent category (i.e. the one that you want the new category to be under in the hierarchy), then click the green ‘+’ icon.

Clicking on the new category twice will allow you to rename it. It is also possible to move categories to different locations by dragging them into other categories.

To delete a category, select it from the hierarchy and click the red ‘X’ icon. If the delete icon is disabled (if it is grey instead of red) then the selected category cannot be deleted. A category can be deleted only if it does not contain any other categories or reports.

Managing Reports

The manage reports page allows the user to view, add, edit, delete and archive reports. The main controls in this page are displayed in a screenshot below.

Figure 145: Manage Reports Page

To upload a report, click the ‘Add New Report’ link. A pop-up form will appear. Set the report’s name and category. The ‘Admin Report’ checkbox allows you to make the report available to administrators only and allow them to run the report against all users in the system. Reports that are not set as admin reports will only provide information about the logged in user’s subordinates. Click the ‘select’ button to choose a Crystal Report .rpt file to upload.

Once the upload has completed the two additional settings will need to be defined. The connection type checkboxes should be used to set which users you want the report to run against. It is possible for a report to run against Skills Assessor and/or Training Manager users. The second option should be used to map the report database to the name of the database used for your system. After entering these settings click the ‘Add’ button to complete the report upload.

Note: In certain cases it is possible for users to upload Crystal Report files to the web server without completing the setup of the report item in Skills Assessor. This will result in the report file being retained by the server; however, it will not be accessible via Skills Assessor. These files will be prefixed with ‘TEMPFILE’ and may be manually deleted from the server’s Crystal Reports upload folder by administrators.

To edit report settings, select a report from the table in the Manage Reports page and click it’s associated ‘Edit link’. A popup window will appear allowing you to change the details of the report, including name, category, the Crystal Reports .rpt file and database connection details. Once you have finished editing the report click the ‘Update’ button to apply the changes.

To archive a report, click it’s associated ‘Archive’ link from the table in the Manage Reports page. An archived report can be unarchived in a similar manner. Reports that are archived will not be listed in the ‘View Reports’ page.

All uploaded reports can also be downloaded via the ‘download’ link from the Manage Reports page.

Viewing Reports

Reports can be generated from the ‘View Reports’ page. The page will initially display the category hierarchy, including the reports that have been allocated to each category. Browse the category hierarchy and select the report that you want to view. A Crystal Reports popup window will appear. Depending on how the report was developed, this window will either show the report immediately, or request additional information before displaying the report.

Restricting Report Results

If you wish to restrict report results so that only the details of the logged-in user’s subordinates are displayed, the Crystal Report will need to include a UserID parameter. This parameter should have the ‘Show on (Viewer) panel’ attribute set to ‘Do not show’.

Omitting this parameter will cause report results to include data about all Skills Assessor users, regardless of the access level of the logged in user.

Skillsroute

Skillsroute allows the management of bulk changes (inserting new agent, adding and updating skills and adding and updating proficiency levels) in Genesys CME

The prerequisites are:-

- GIS 7.5 & CME 7.5 on the server.

Select the Skillsroute page, as per the example below.

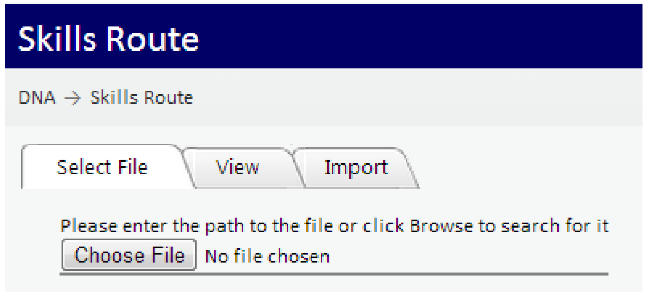


Figure 146: Selecting the Skillsroute page

Browse and select the relevant spreadsheet containing the data for updating Genesys.

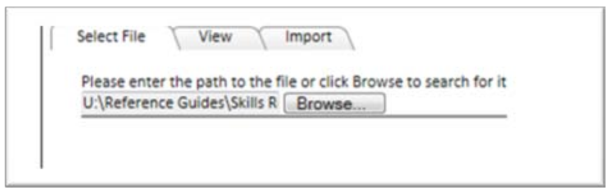


Figure 147: Select a spreadsheet for data import

The spreadsheet must be created in the format as per the example below and be in Excel 97 – 2003 format file (.xls). The actual format of the information will be dictated by what is already in CME.

The Skill levels in the example below are displayed as Bronze, Silver and Gold, with the proficiency levels associated to the employee as 1, 2 or 3 (in this example 1 is the highest proficiency level).

The proficiency levels will be decided by the individual organization as used within their routing strategies.

Employee ID	First Name	Last Name	User Name	Bronze	Silver	Gold
jhiggins	Joanne	Higgins	jhiggins	1	2	3
jparker	Jerry	Parker	jparker	2	3	3

Figure 148: Spreadsheet format

To create a new employee, the employee details are entered under the first four column headings as per the example below and the format will be as per the existing information as expected in CME.

Employee ID	First Name	Last Name	User Name	Bronze	Silver	Gold
jhiggins	Joanne	Higgins	jhiggins	1	2	3
jparker	Jerry	Parker	jparker	2	3	3

Figure 149: Creating a new employee

To create a new Skill, this is included at the end of the spread sheet after the Employee ID, First Name, Last Name and User Name and the proficiency level associated with the Skill is entered in the column against the relevant employee.

Employee ID	First Name	Last Name	User Name	Bronze	Silver	Gold
jhiggins	Joanne	Higgins	jhiggins	1	2	3
jparker	Jerry	Parker	jparker	2	3	3

Figure 150: Setting employee skills

After selecting the file, click on **View** to confirm the information is correct.

Figure 151: Confirming accuracy of input data

Map the **Source Fields** to the **User Fields** by dragging and dropping the information across.

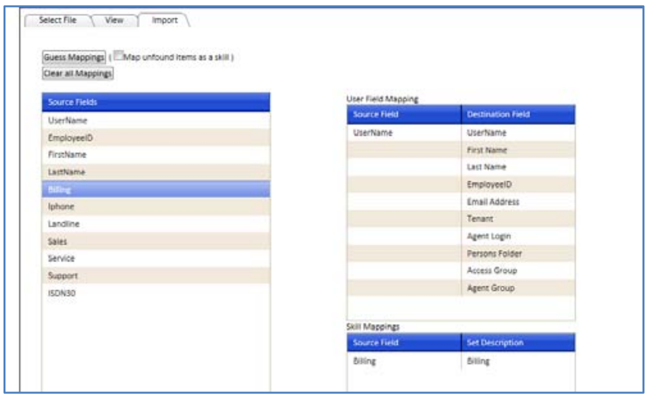


Figure 152: Mapping source and user fields

Once the mapping has been done, select the relevant options at the bottom and click on **Import**. The information will then be updated in CME.

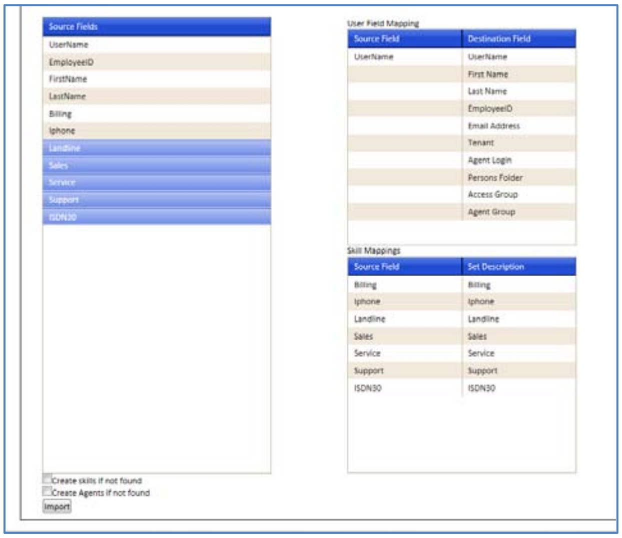


Figure 153: Finalizing the import of employee data

CME Authentication

Skills Assessor has the option to authenticate users via their CME log in details. To enable this ensure that the users' Genesys CME username is included in the user upload or that the relevant field has been included in the hierarchy import.

In order to configure this setting first select the `Systems Settings` page within Skills Assessor and select the `Field Mappings` tab.

This will display a screen similar to the example below:

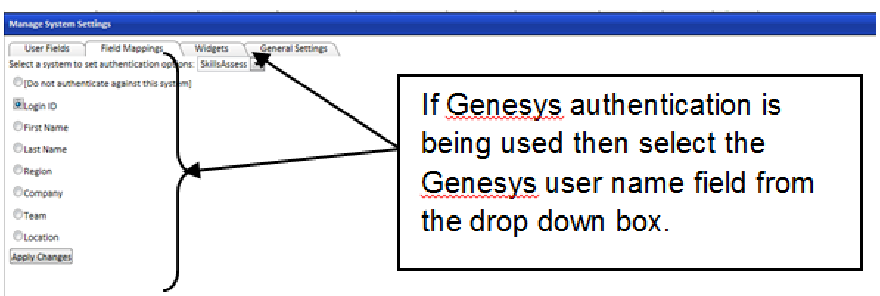


Figure 154: Authenticating user access via their CME credentials

If Genesys CME authentication has been enabled you will be able to select Genesys from the drop down menu. The field name then has to be selected from the list i.e. Genesys username.

Click on `Apply Changes` to save any changes you have made and to enable Genesys to authenticate the user.

When a user logs into Skills Assessor they can then select `Genesys GIS` as the `Select System` option rather than Skills Assessor.

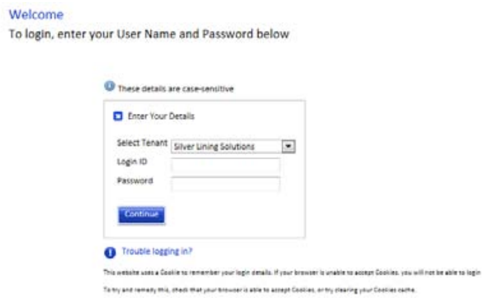


Figure 155: Selecting Genesys for authenticating user credentials

The user entered `UserName` will then be authenticated and validated against Genesys login details.

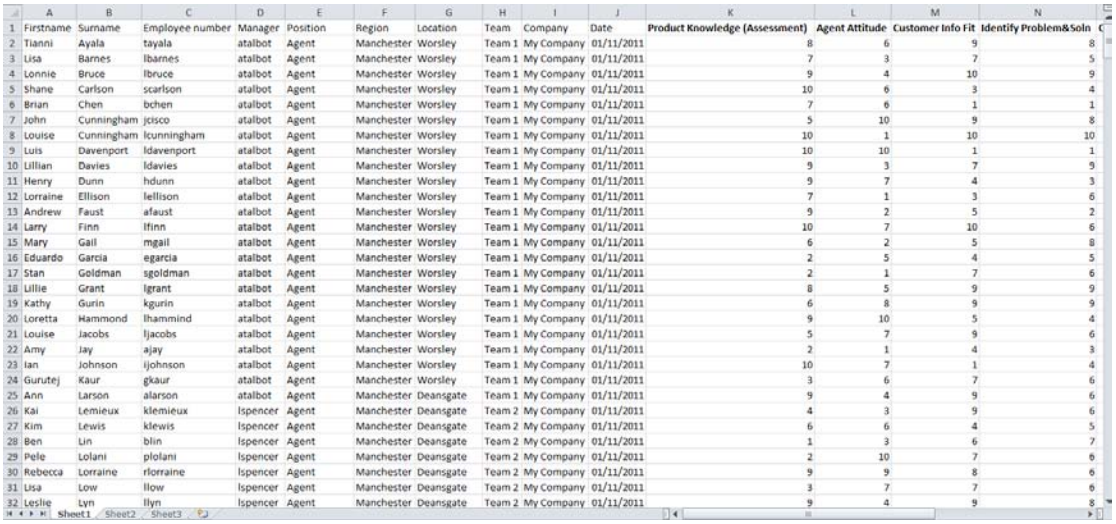
SkillsDNA Creation

Manage DNA Components

Before DNA Blocks can be created Key Performance information has to be imported (this data is also used in the SkillsAnalysis page for correlation analysis).

In the example extract below, there is a unique identifier for the individual, a date and associated data.

This is the data spreadsheet that will be imported into Skills Assessor to create the Skills DNA blocks and for use in the correlation analysis page.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Firstname	Surname	Employee number	Manager	Position	Region	Location	Team	Company	Date	Product Knowledge (Assessment)	Agent Attitude	Customer Info Fit	Identify Problem&Soln
2	Tianni	Ayala	tayala	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	6	9	8
3	Lisa	Barnes	lbarnes	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	3	7	5
4	Lonnie	Bruce	lbruce	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	4	10	9
5	Shane	Carlson	scarlson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	6	3	4
6	Brian	Chen	bchen	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	6	1	1
7	John	Cunningham	jcisco	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	10	9	8
8	Louise	Cunningham	lcunningham	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	1	10	10
9	Luis	Davenport	ldavenport	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	10	1	1
10	Lillian	Davies	ldavies	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	3	7	9
11	Henry	Dunn	hdunn	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	7	4	3
12	Lorraine	Ellison	lellison	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	1	3	6
13	Andrew	Faust	afaust	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	2	5	2
14	Larry	Finn	lfinn	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	10	6
15	Mary	Gail	mgail	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	2	5	8
16	Eduardo	Garcia	egarcia	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	5	4	5
17	Stan	Goldman	sgoldman	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1	7	6
18	Lillie	Grant	lgrant	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	5	9	9
19	Kathy	Gurin	kgurin	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	8	9	9
20	Loretta	Hammond	lhammind	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	10	5	4
21	Louise	Jacobs	ljacobs	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	7	9	6
22	Amy	Jay	ajay	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1	4	3
23	Ian	Johnson	ijohnson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	1	4
24	Gurutej	Kaur	gkaur	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	3	6	7	6
25	Ann	Larson	alarson	atalbot	Agent	Manchester	Deansgate	Team 1	My Company	01/11/2011	9	4	9	6
26	Kai	Lemieux	klemieux	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	4	3	9	6
27	Kim	Lewis	klewis	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	6	6	4	5
28	Ben	Lin	blin	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	1	3	6	7
29	Pele	Lolani	plolani	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	2	10	7	6
30	Rebecca	Lorraine	rlorraine	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	9	9	8	6
31	Lisa	Low	llow	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	3	7	7	6
32	Leslie	Lyn	llyn	lspencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	9	4	9	8

Sheet1 Sheet2 Sheet3

Figure 156: Importing Key Performance information via a spreadsheet

To import the data, first select the **DNA Components** page as per the example below.

Use the drop down box to select the component type and in this example the component type will be KPI.

Provide a description and then configure the remaining information as required.

Click **Create** to create the component once the information has been entered.

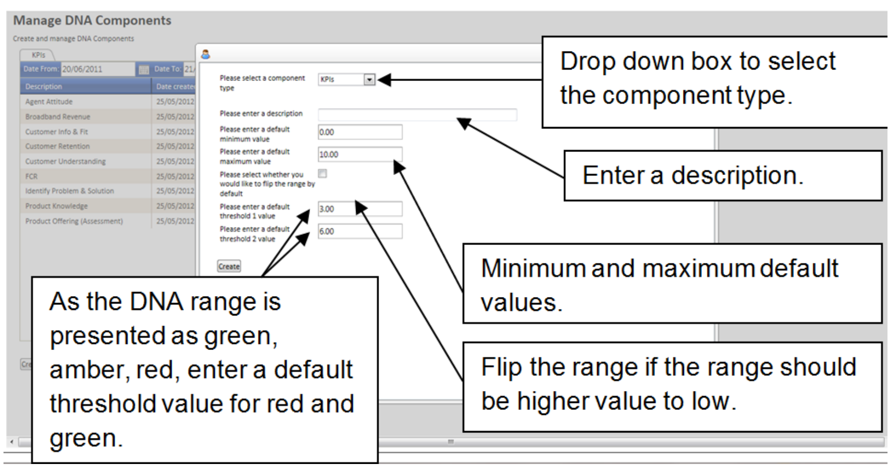


Figure 157: Display of the created DNA component

Import KPI Data

Manually Importing KPI data

The next step is to import the data into the SkillsDNA repository. To do this select the `Import KPI Data` page as per the example below and click on `Import New Data`.

Use this process to upload any new data.

Note: The ability to archive KPI imports has been removed from version 8.1.127 onwards. Any KPI imports which were archived prior to an upgrade will be un-archived.

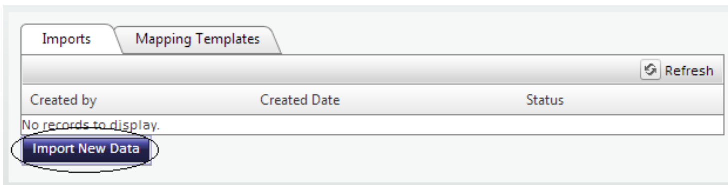


Figure 158: Importing KPI data

This will bring up the import wizard as per the example below.

After selecting the required file click on **Next**.

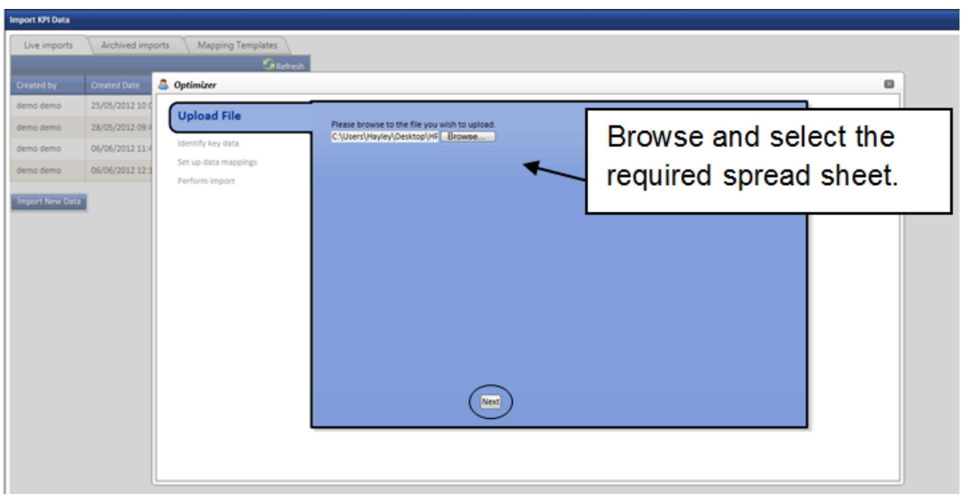


Figure 159: Importing KPI data

Select the required sheet from the drop down box.

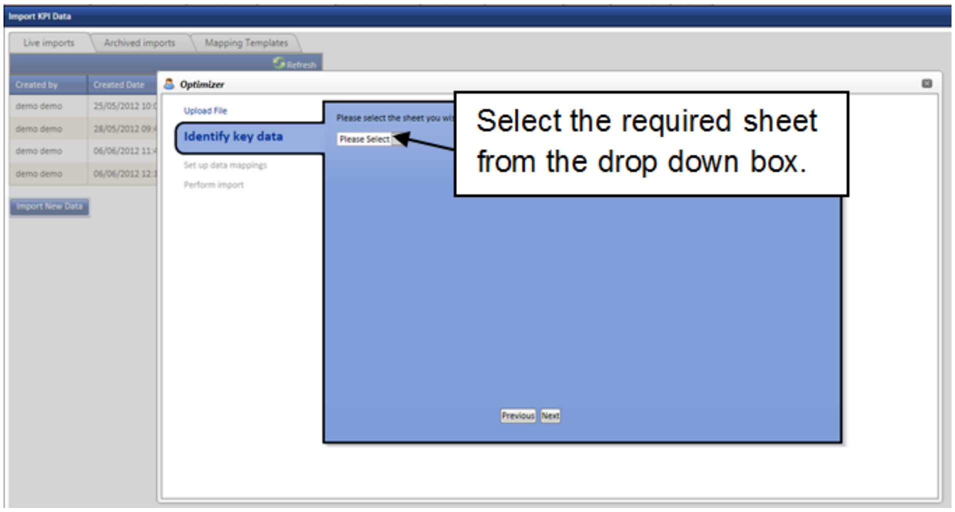


Figure 160: Importing KPI data

Selecting the required sheet brings up the next step for importing the data.

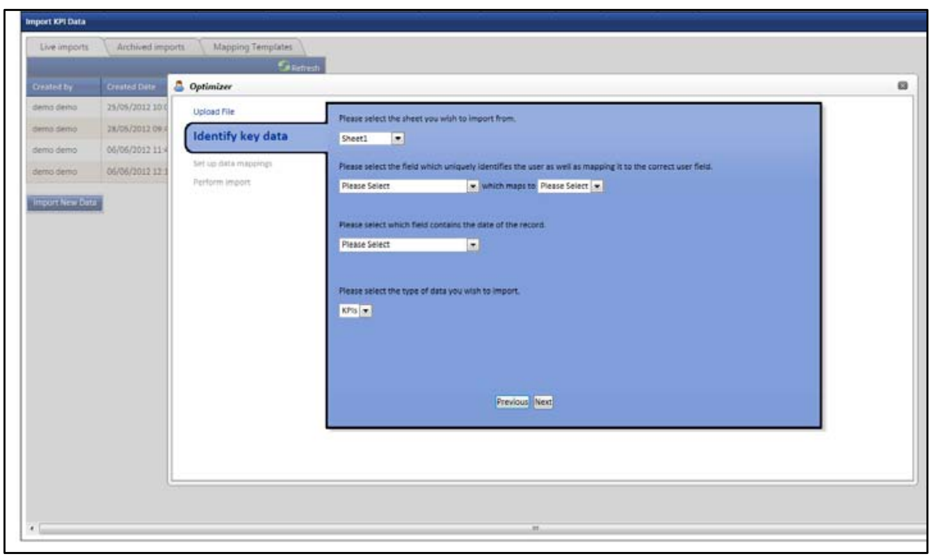


Figure 161: Importing KPI data

Select the correct fields from the drop down boxes. Click on `Next` once completed.

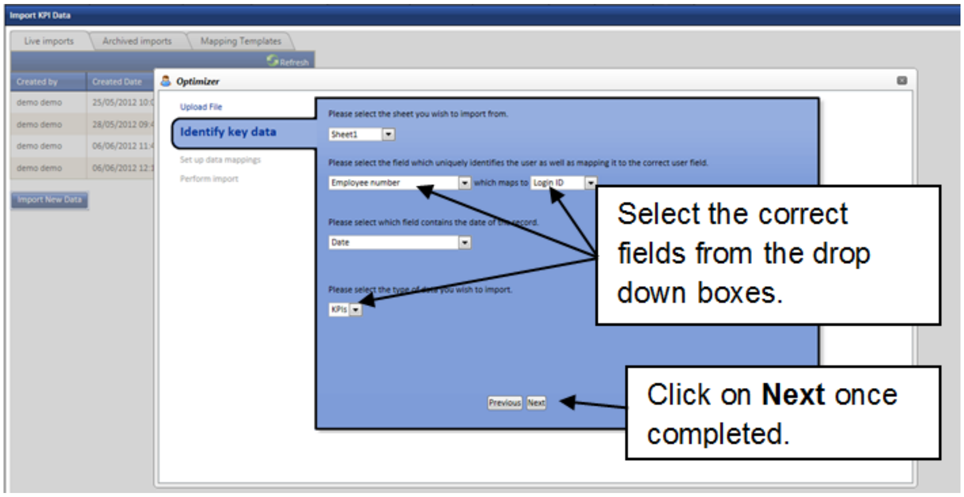


Figure 162: Importing KPI data

Select the the relevant source field and which component it maps to from the components created previously.

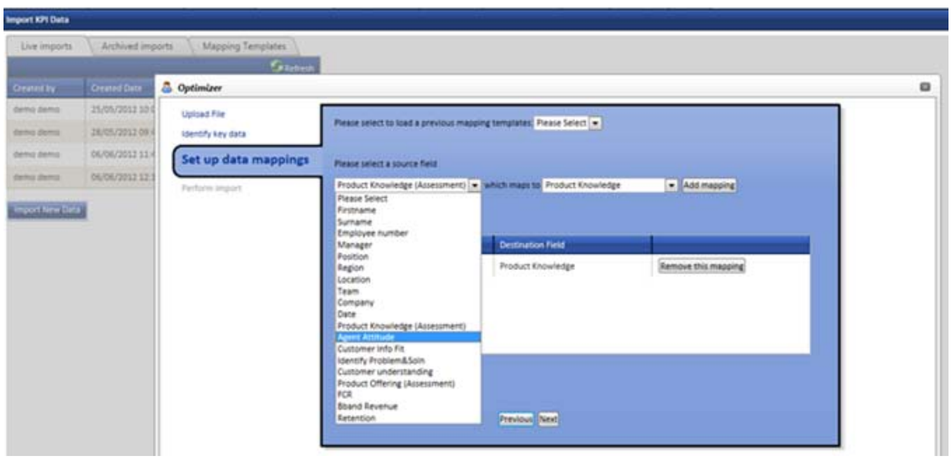


Figure 163: Mapping source fields to existing components

After selecting `Add mapping` it will then appear within the `Field Mappings` list.

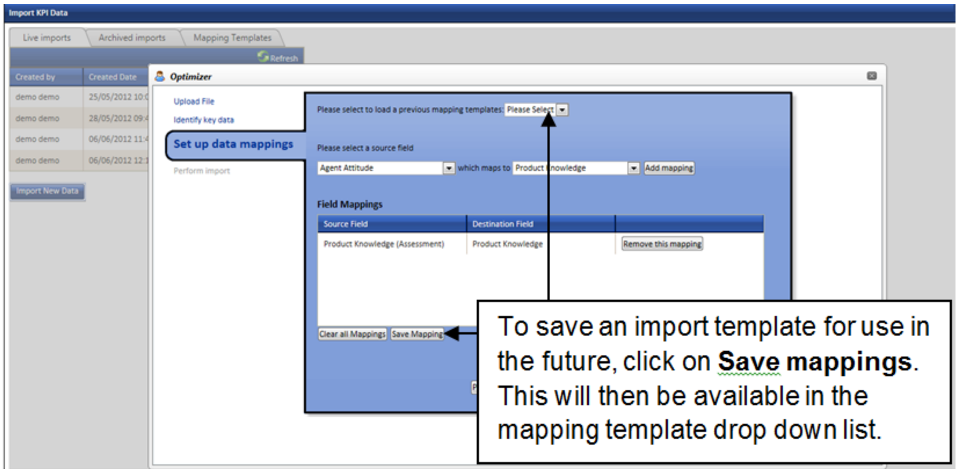


Figure 164: Viewing mapping results and saving import templates

To save the mapping template to reuse for future data imports, click on `Save Mappings`.

Click on `Next` to import the data once complete. The import mapping template will be really useful if new data is imported on a regular basis.

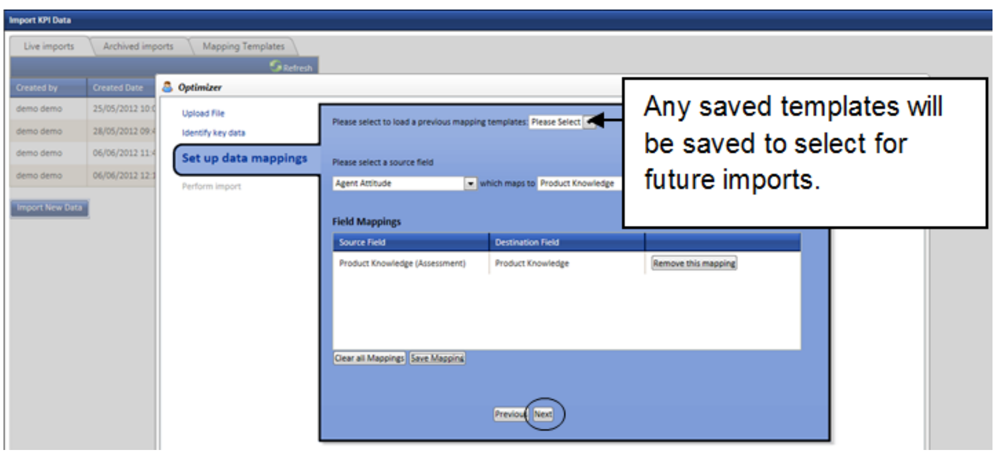


Figure 165: Saving an import template

Click on `Start Import` to import the data.

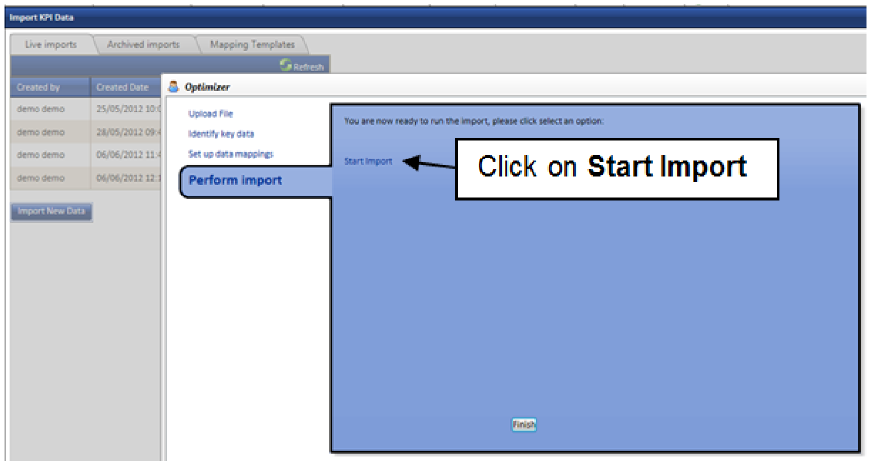


Figure 166: Starting data import

Once the import has been completed click on `Finish`.

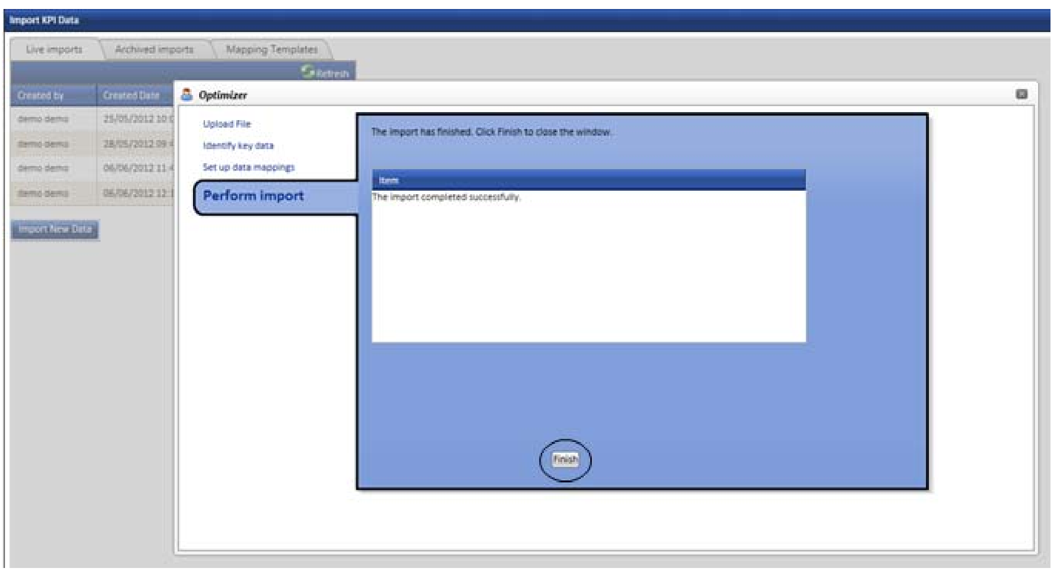


Figure 167: Finalizing data import

The data import will then show in the import log. This is where data previously imported can be deleted.

Automatically Importing KPI Data

The process of importing KPI data can be partly automated via the DNA Import Service. Once you have installed and configured this service it is necessary only to copy a KPI import file into the defined import folder. The service will automatically recognize that a file has been added, process the import and then move the file to the archives folder.

DNA User Field Mapping

To create the `View Filtered DNA` view, user fields (from the `System Settings` fields page) have to be selected in order in the `DNA User Field Mapping` page.

Refresh the DNA users once these fields have been selected.

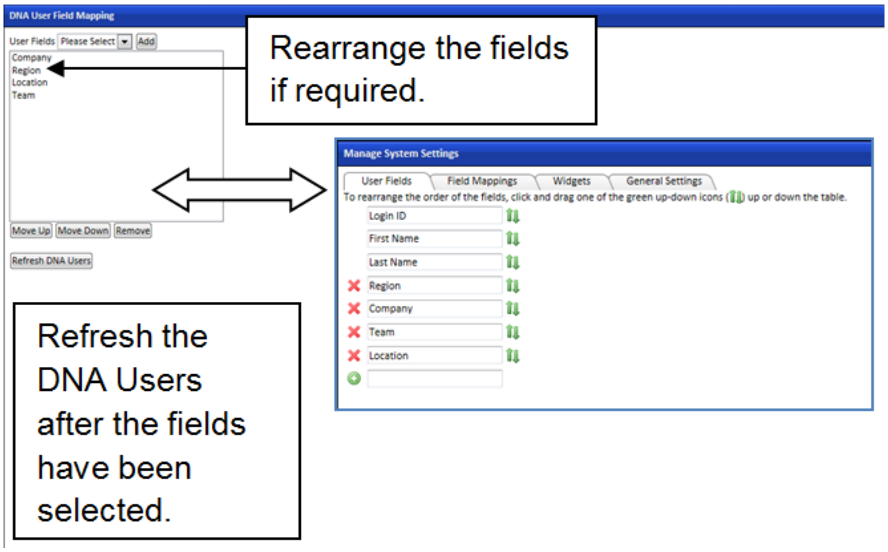


Figure 168: Setting DNA data filters in the DNA User Field Mapping page

Manage DNA Blocks

DNA blocks are created in the **DNA Blocks** page as per the example below.

Drag and drop the DNA components into the block to create DNA blocks.

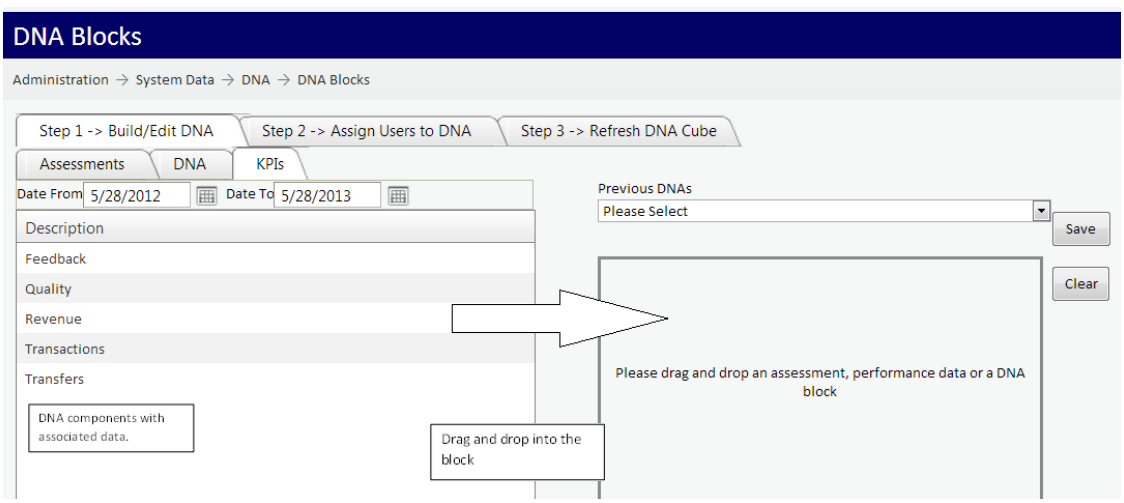


Figure 169: Creating DNA blocks

Multiple components can be used to create a DNA block as per the example below.

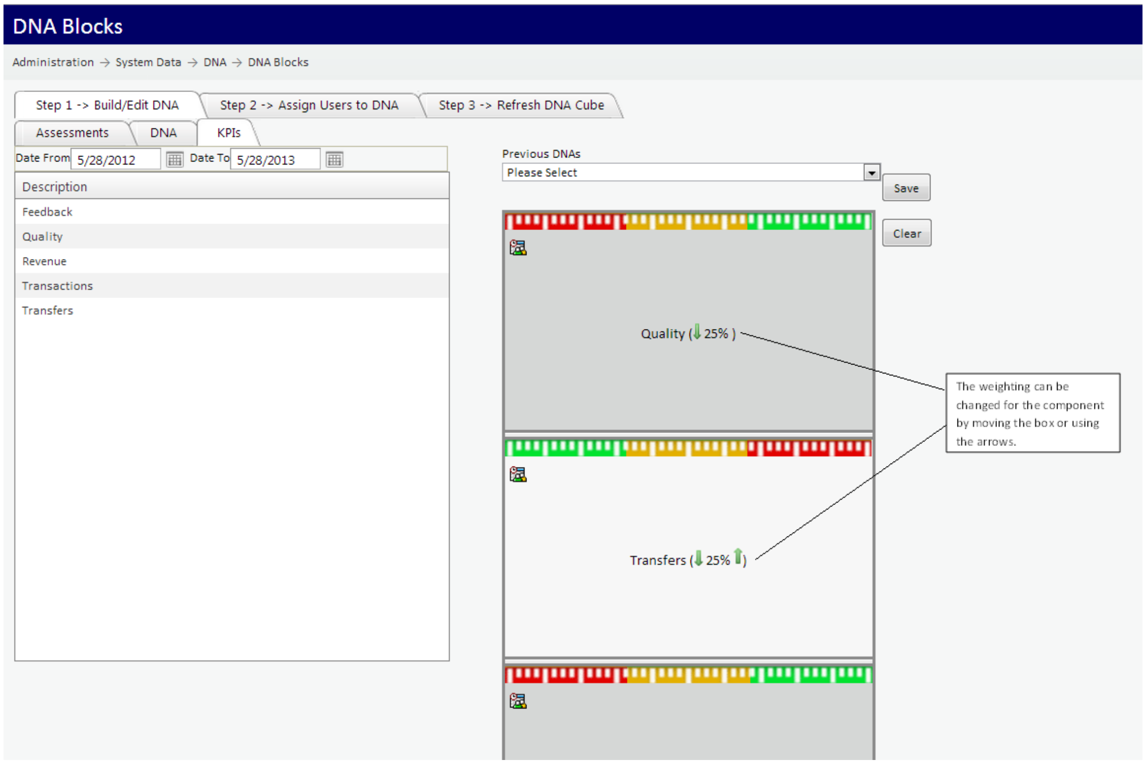


Figure 170: Creating DNA blocks using multiple components

Click on the ruler to amend the distribution. It is important to note that if the highest value for the component is for example 10 then the range in the example below would need to be amended to show a maximum value of 10.

Once the DNA block has been created click on `Save` and give the DNA block a name.

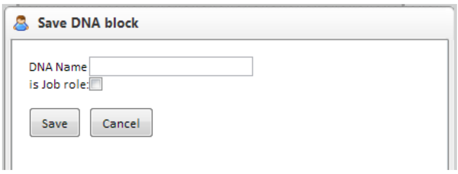


Figure 171: Saving a new DNA block

The new DNA block will then be available in the `Previous DNA's` drop down box and within the `DNA` tab.

In this example several DNA blocks have been combined to create a job role.

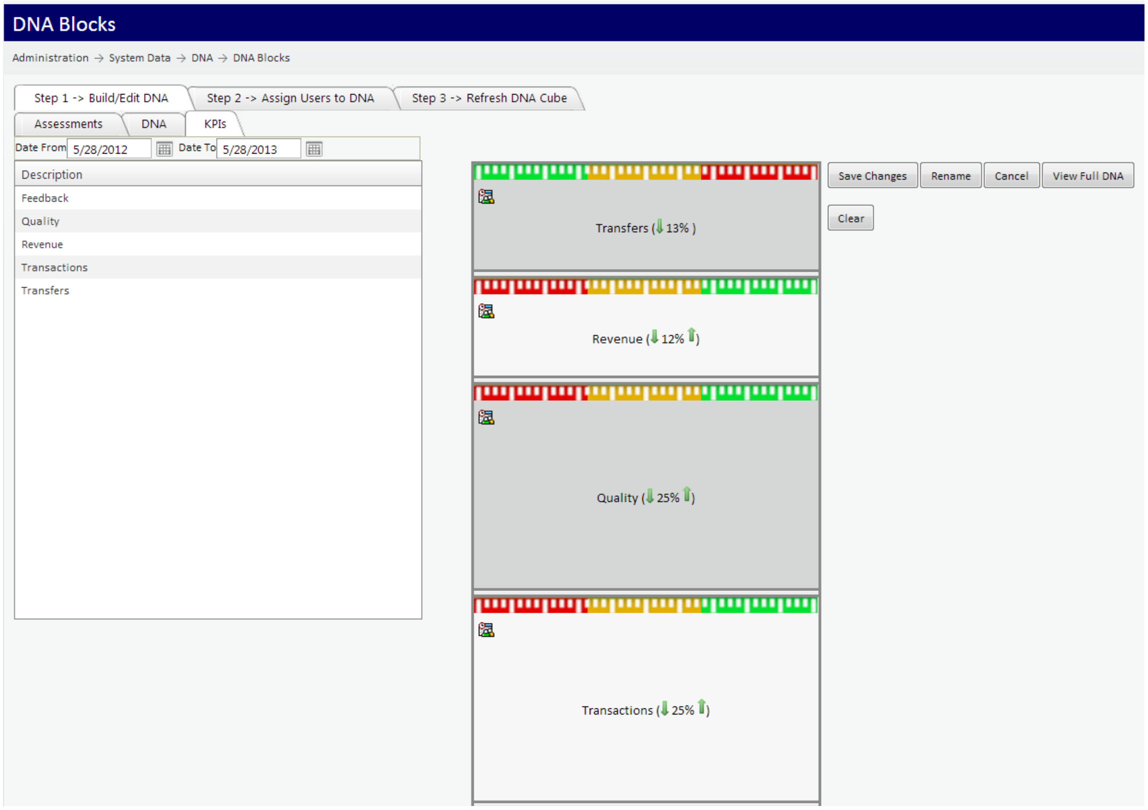


Figure 172: Display of existing DNA blocks

To create a job role, first create the DNA block and then click on `Save`. The `Save DNA Block` window will then be presented. Check the `Is Job Role` checkbox and give the job role a name. This job role will then be available for mapping to users.

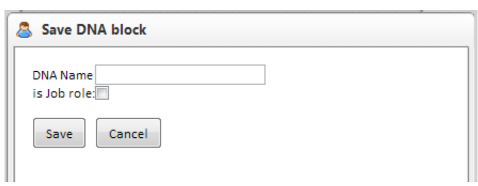


Figure 173: Creating a new job role

After building the DNA blocks assign the agents to DNA / roles. Users can only be assigned to one job role.

To assign an individual to a job role, highlight the users and drag and drop them onto the job role, in the example below this would be onto the Sales Agent role.

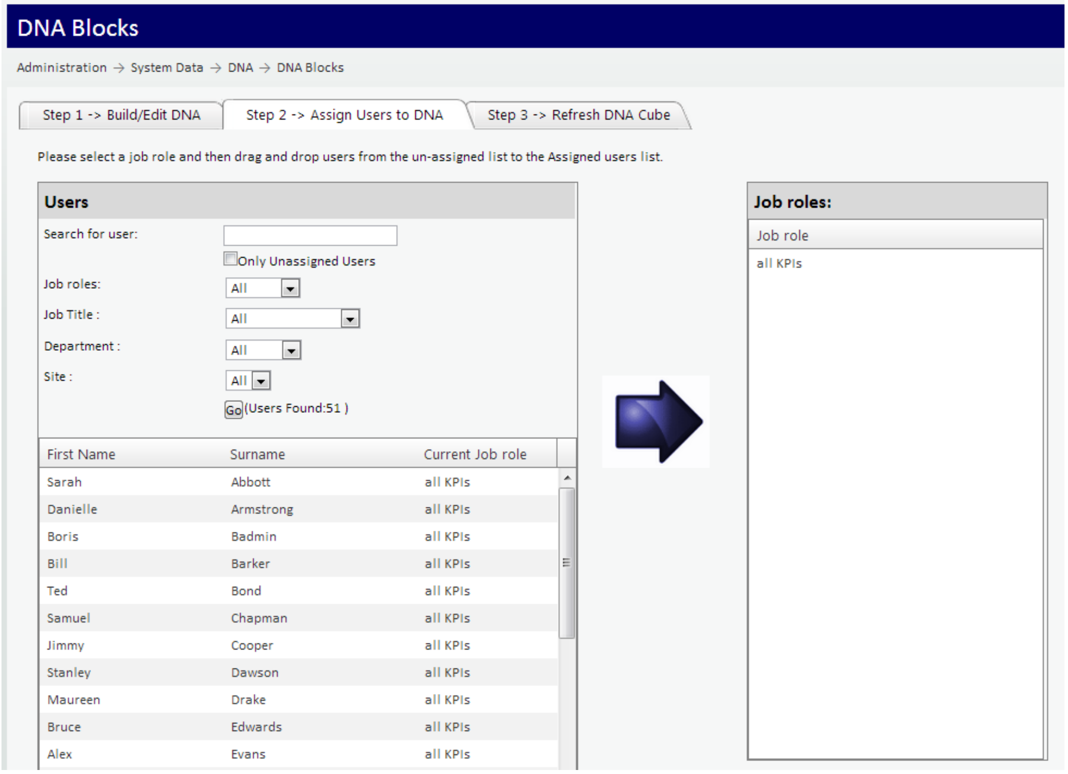


Figure 174: Assigning individuals to job roles

After assigning users to roles, select the last tab and refresh the DNA Cube.

Figure 175: Refreshing the DNA cube

Your DNA Mapping

This page allows the filtered DNA view and the options to choose from are available from the user fields selected in the `DNA User Field Mapping` page previously.

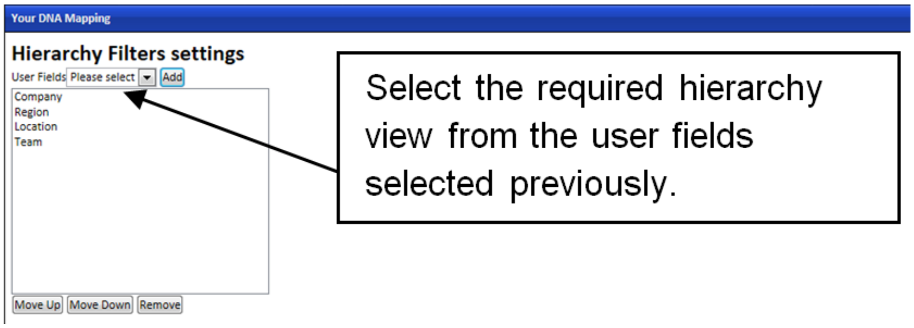


Figure 176: Filtering the DNA view

View Filtered DNA

The `View Filtered DNA` page gives visibility by hierarchy of where the associated users are within the aggregate DNA block.

In this example the total number of users who are in green, amber or red based on their aggregated DNA score (based on the DNA components and the weightings) are shown in the top right hand corner. They are also displayed visually as per the example below.

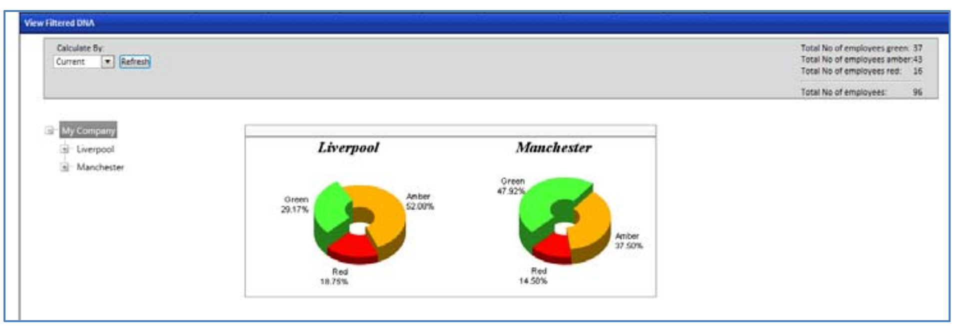


Figure 177: View Filtered DNA page

Either click on the donuts or expand the hierarchy at the left hand side to view the individual user results.

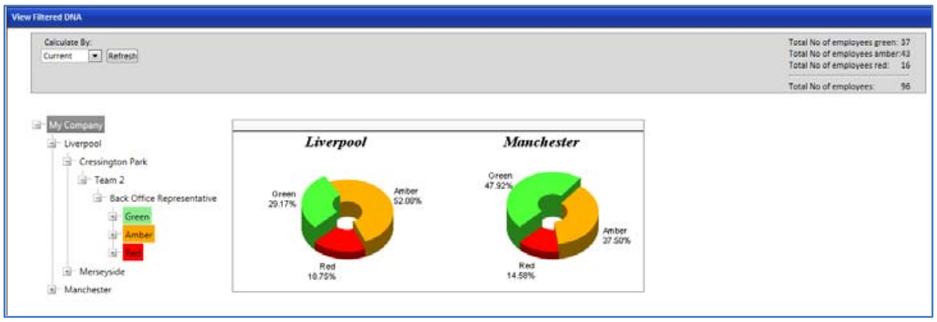


Figure 178: Viewing detailed information in the View Filtered DNA page

Select an individual user to reveal their DNA results.

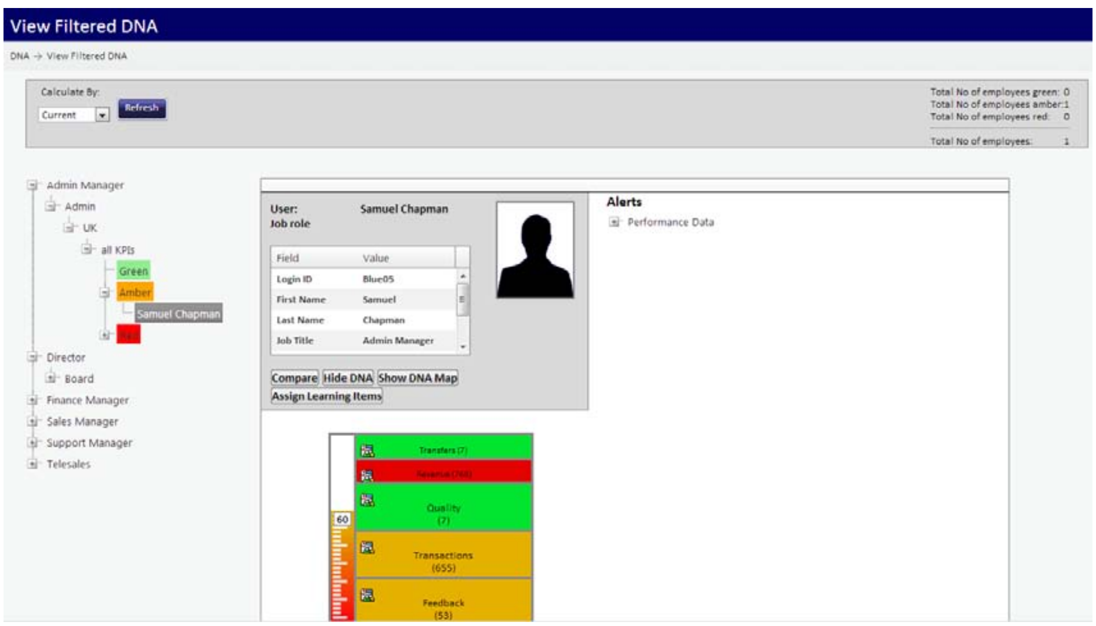


Figure 179: Viewing individual DNA results

Click on `Show DNA` to view the DNA block for the individual.

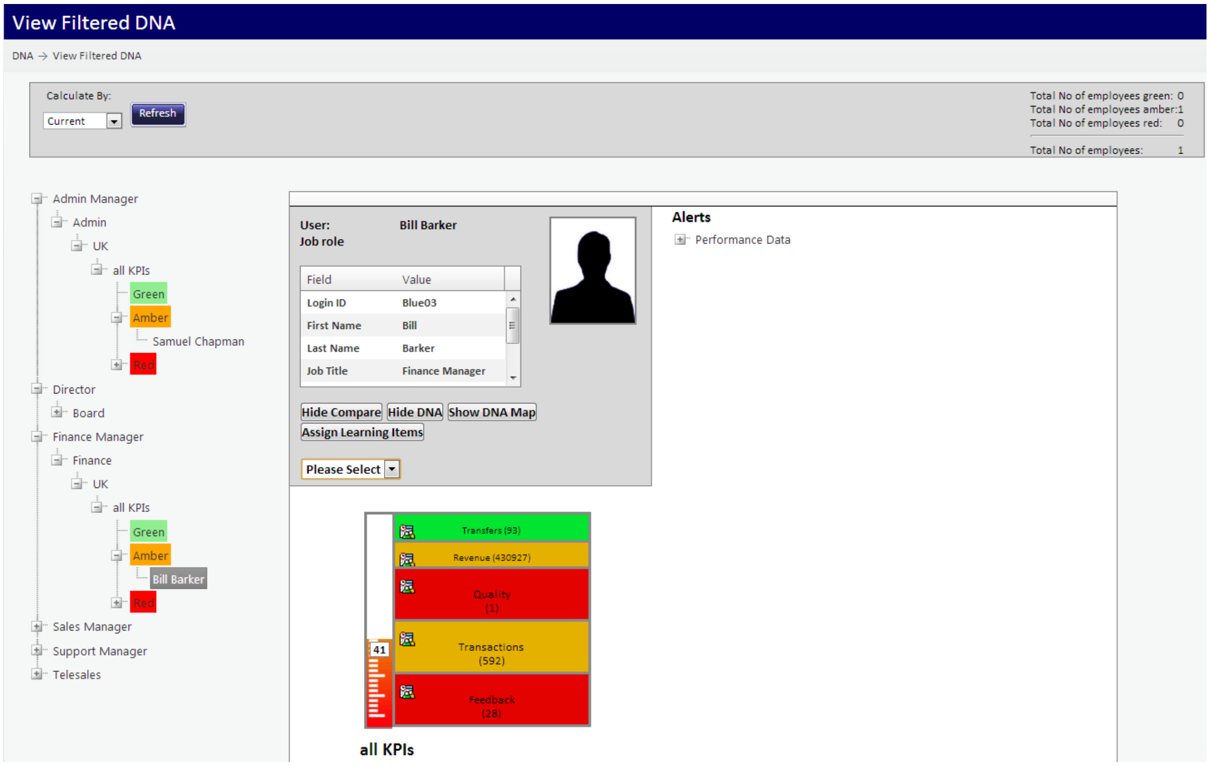


Figure 180: Viewing individual DNA results

Click on `Show DNA Map` to view the full DNA breakdown.

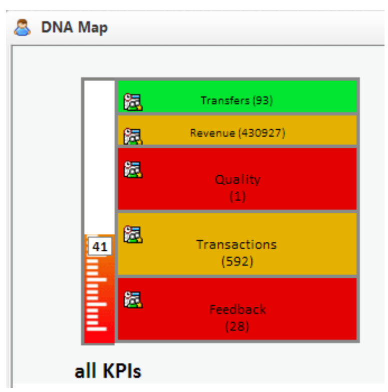


Figure 181: Viewing the DNA map

There is also the option to compare the individual against their scores in another job role to identify the areas for attention.

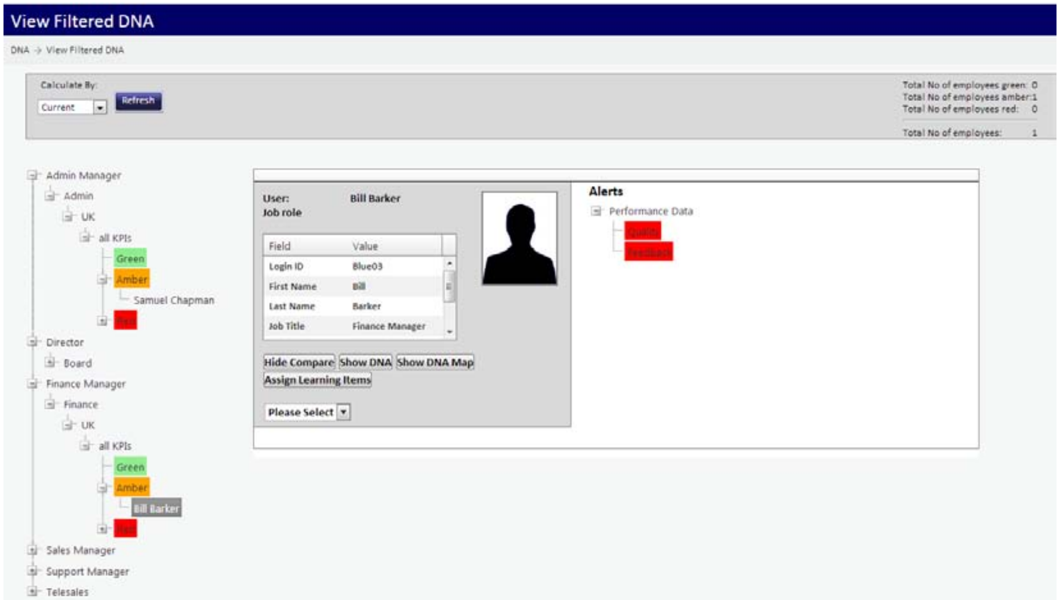


Figure 182: Comparing individuals with other job roles

Top DNA Agents

The `Top DNA Agents` page is used for DNA reports.

In the example below the role selected is Sales Agent; however the application has searched across all job roles to present the top agents based on the aggregate DNA components for the Sales Agent. This means that potentially the top performing agents may not necessarily be associated to the actual job role but may belong to a different job role, but has the aggregate DNA components.

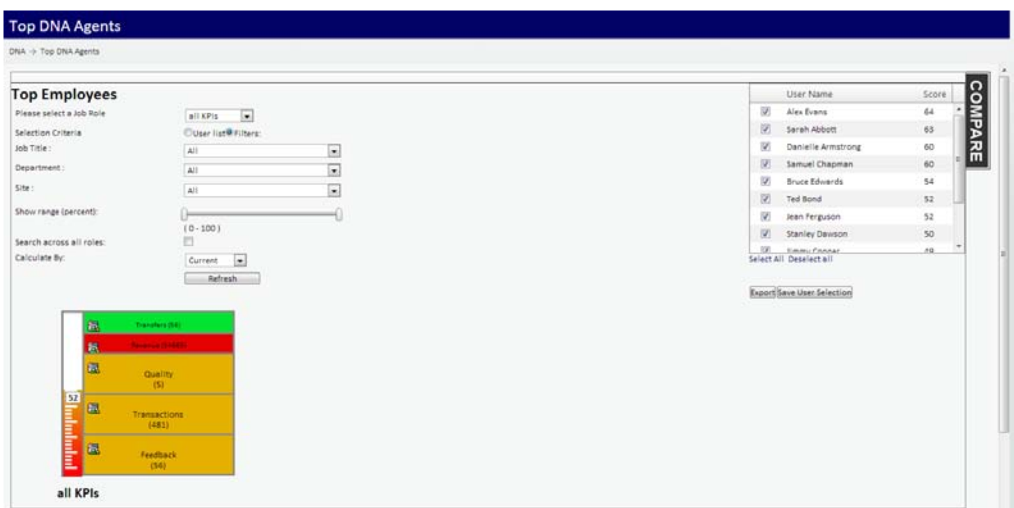


Figure 183: Top DNA Agents page

Results can then be filtered. In the example below this displays users between 90 and 100%.

The section on the right of the page can be used to create custom user selections, which can then be applied by clicking the `User List` radio button in `Selection Criteria`. This will then load data based on the users in the saved selection.

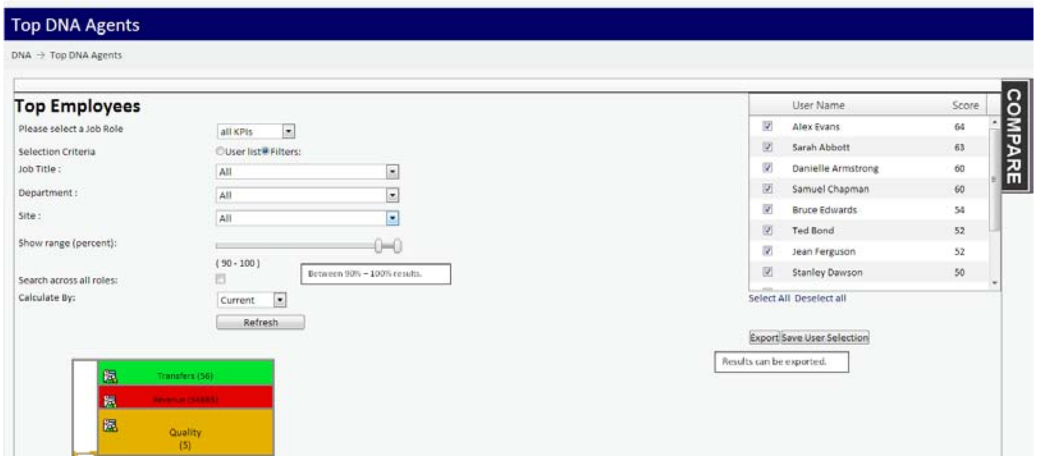


Figure 184: Filtering results in the top DNA Agents page

Individual users can be selected, however, this will ignore any filters applied in the `Top Employees` section.

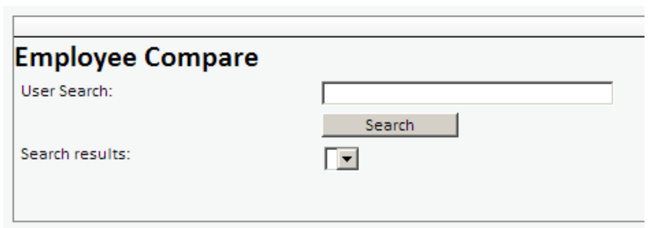


Figure 185: Viewing detail about a selected user

DNA Trend Graph

The DNA trend graph allows users to view changes in individual or group DNA data over time. It is possible to view DNA trends at a high level, e.g. for DNA blocks and job roles. Alternatively, users can track progress of individual KPIs for one or a group of selected users.

To view a trend graph for a specific DNA and user selection, click on the Trend Graph link in the navigation menu. Click the `Select DNA Component for Selected Users` link at the top of the page or the pencil icon to the left of the link. The following screen will allow you to select the date range for which you wish to view DNA data trends, user selection and DNA component selection options.

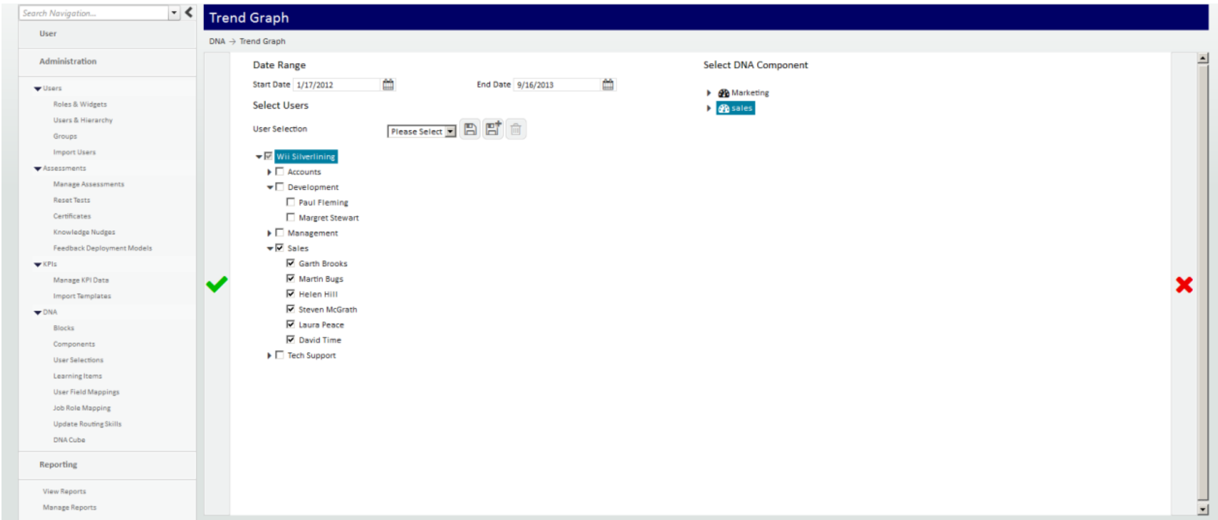


Figure 186: Trend graph date range, user and DNA component options

The date pickers in the top left of the screen allow you to define the time period for the DNA trend graph.

The `User Selection` section area allows you to select which users or groups you wish to be included in the trend graph. The `Select DNA Component` section on the right of the page allows you to select either a DNA block or a specific component. DNA blocks are listed in the Select `DNA Component` area by default but each role can be expanded by double-clicking on it or clicking the triangle icon next to it. This will expand the role and show its components. The components can be selected if you only wish to see DNA trend data for the component rather than a block.

Note: Administrators are able to view DNA data for all users. Other user types will be limited to viewing data for users who appear under them in the organization’s hierarchy. Alternatively, if the user does not manage other users, only the agent’s DNA data will be available in the trend graph.

Once you’ve selected a date range, users and a DNA job role/component, click the green tick icon on the left side of the page. The requested data will then be loaded and displayed.

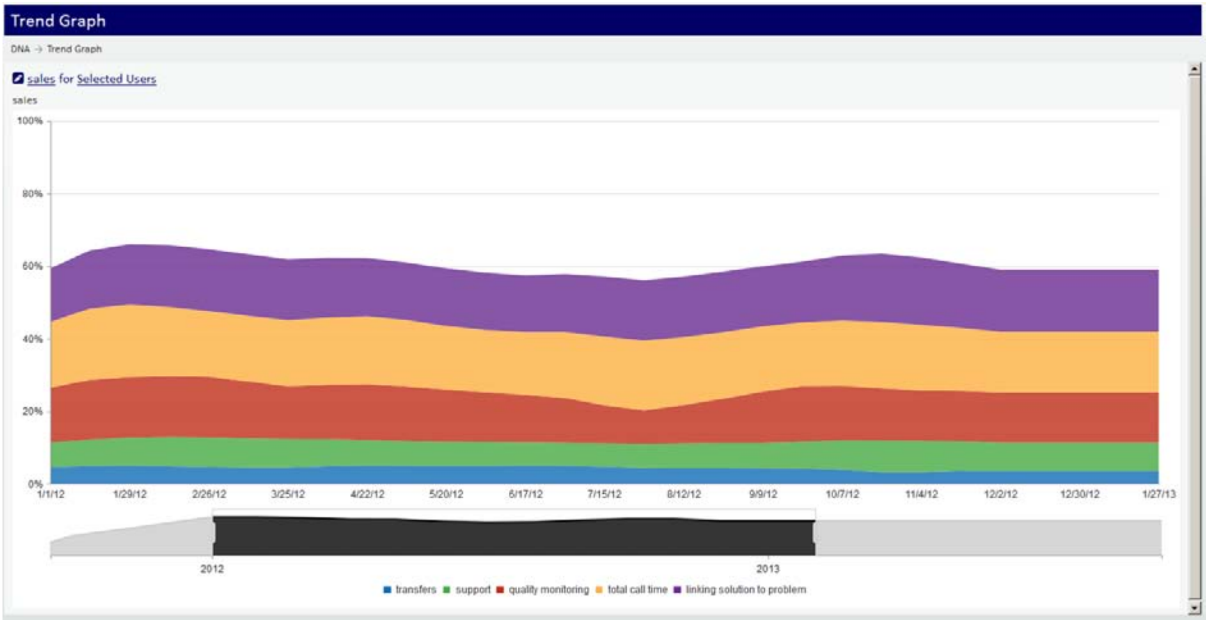


Figure 187: Trend Graph

The trend graph screen includes the main graph area and an associated date slider below the graph. The date slider allows the user to shift the time period displayed by the graph forward and backward by dragging the highlighted area left and right. The end points of the date slider can also be dragged individually in order to expand/contract the displayed time period.

If you opted to view a DNA block you should see a graph similar to the one shown above. Each stacked area in the graph shows DNA data for one of the block's components. The key for the graph is shown at the bottom of the page. The total height of the graph shows the value of the block. This can be used to gauge whether the performance of the selected users increased or decreased in the selected time period based on their DNA data values.

Hovering over individual components will show additional information including the segment date, component name, contribution and raw value. The contribution relates to the component value's contribution to the whole block value expressed as a percentage. The raw value relates to the percentage of the highlighted component/date combination out of the maximum possible score defined for the component.

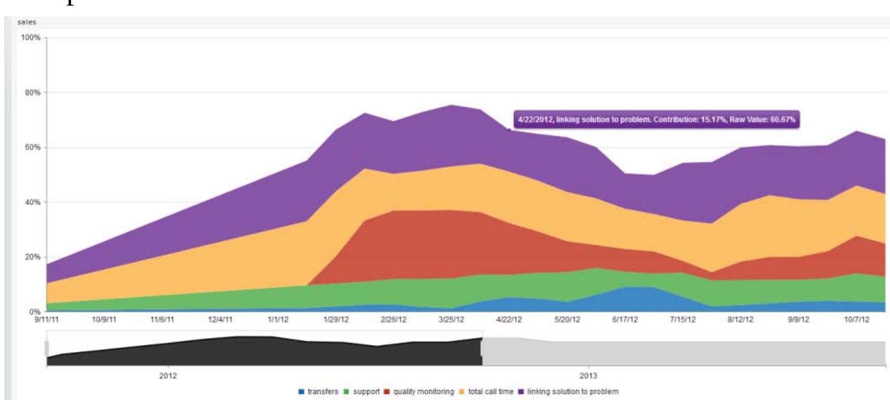


Figure 188: Trend Graph

Clicking on any of the stacked areas will result in the display of a new graph including only the selected DNA component for the previously selected users and time period. It is possible to return to the parent block via the breadcrumb in the top left of the page.

User selections

It is possible to define custom user selections within the trend graph page. These can be used to group users and quickly load the trend graph for the users listed in the saved user selection. Follow the steps below to create a new custom user selection.

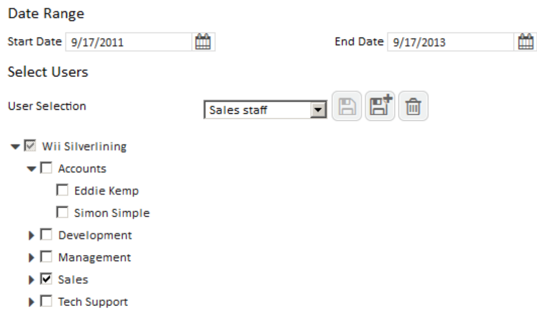


Figure 189: User selection options

1. To do this, click on the Trend Graph link in the navigation menu.
2. Click on either the `Select DNA Component` or `Selected Users`.
3. Select some users in the `User Selection` area.
4. Click the Save icon to the right of the `User Selection` area.
5. Set a name for the user selection in the `Description` field.
    a. Optionally – Tick the `Shared` checkbox if you want the new user selection to be available to other users. Access restrictions will be applied, i.e. users will only have visibility of others based on their position in the hierarchy and access permissions.
6. Click `OK` to save the new user selection.

Once you have saved a user selection it will be available from the dropdown box in the user selection area. This allows you to quickly load a Trend Graph for a specific list of users.

If you wish to edit the description or shared status of a user selection:

1. Select the saved user selection from the dropdown menu.
2. Edit the description and/or the `Shared` status checkbox.
3. Click the `OK` button.

If you wish to edit the list of users for a saved user selection:

1. Select the saved user selection from the dropdown menu.
2. Add/remove users via the user selection checkboxes.

3. Click the `Save` icon.

4. Verify that the listed users are the ones you wish to save in the user selection and click the `OK` button.

If you wish to delete a saved user selection select it from the dropdown list and click the `Delete` icon.

Update Routing Skills from DNA

This page enables Skills and proficiency levels in CME to be updated for the SkillsDNA output.

The DNA components are presented in the left hand side table and the CME skills in the right hand table.

The DNA components and CME Skills need to be `linked` in the middle table. In this example the `Revenue` DNA has been linked to `Broadband` skill. To link drag and drop the individual components into the middle table.

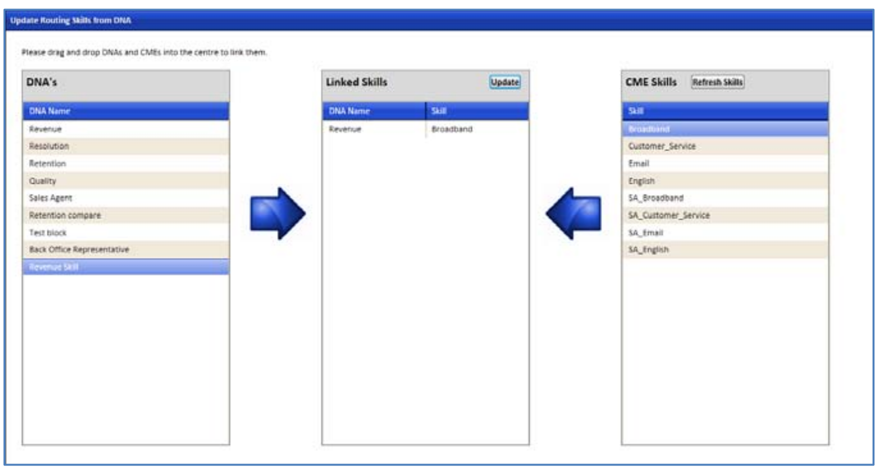


Figure 190: Linking DNA components and CME skills

Configure whether the DNA skill and CME skill are directly mapped or whether the DNA results provide a scale to match the proficiency levels in CME**.**

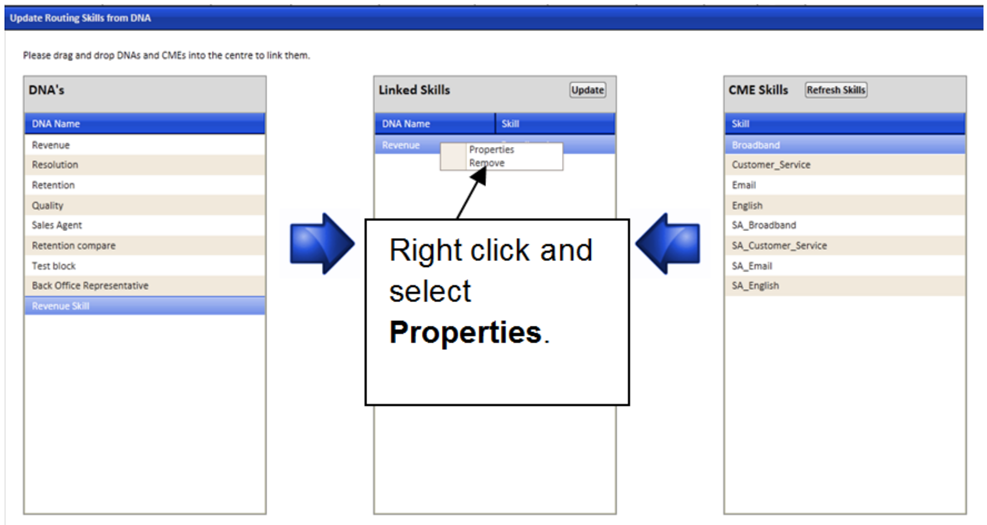


Figure 191: Setting skill link properties

To use levels of DNA results for proficiency levels in CME, enter the DNA Lower bound and DNA Upper values and associate these with a level in CME associated to the Skill. Click on `Add` once complete to create the required levels.

If there is a direct mapping select `Direct Mapping`.

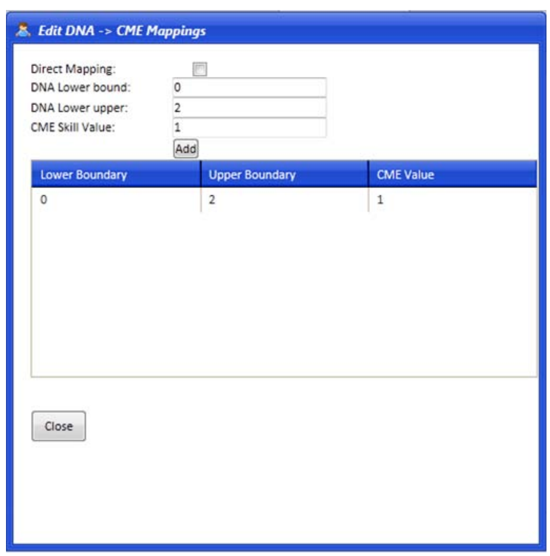


Figure 192: Setting skill link properties

Click on `Update` to update the CME Skill levels. The information will be presented prior to updating CME.

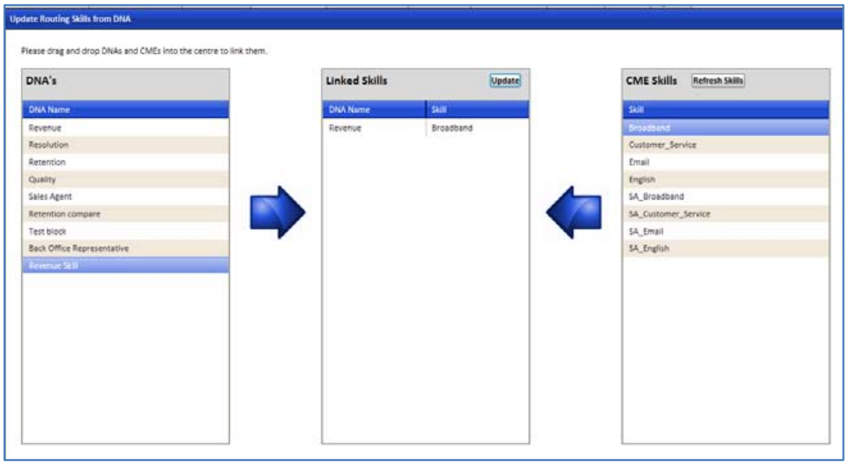


Figure 193: Updating the CME skill levels

SkillsAnalysis

The SkillsAnalysis page works in three stages.

Stage 1, select the users and users are selected from the hierarchy. It is possible to select all users or specific users. In the example below a particular manager has been selected and by leaving this selection the application would only look at this managers team.

If all users are to be selected as part of the analysis, click on `Select all users`.

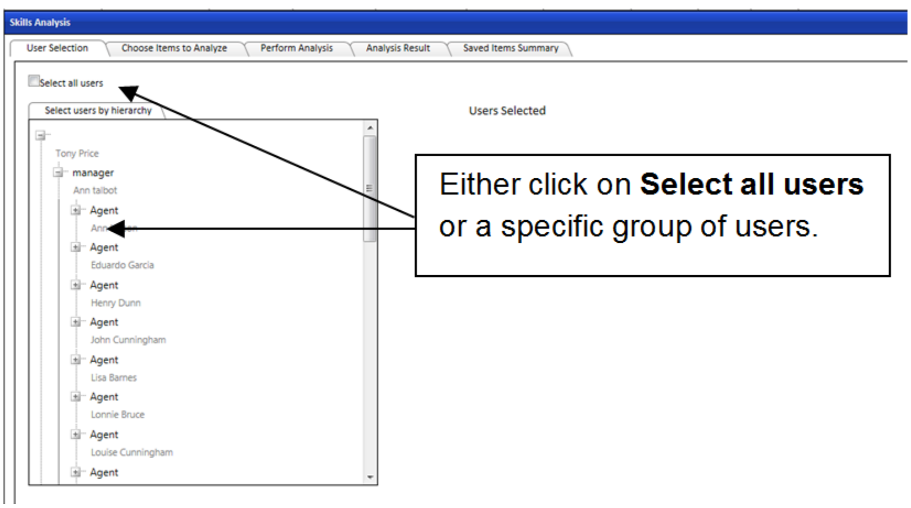


Figure 194: Select users

Click on `Choose items to Analyze` once the users have been selected.

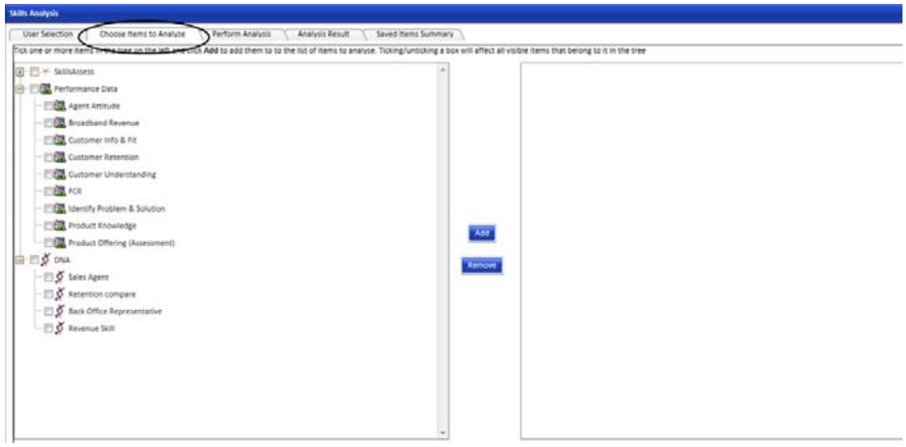


Figure 195: Choose items to analyze

Select which data to use for analysis.

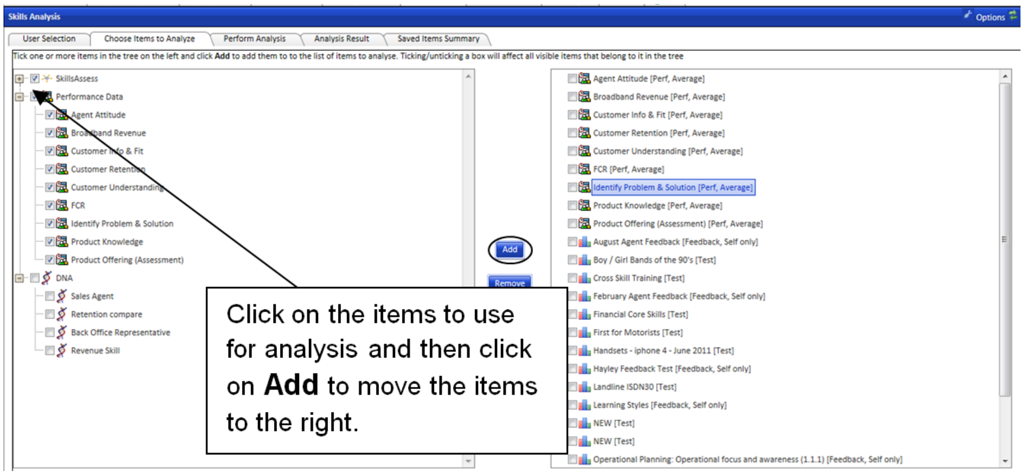


Figure 196: Select data to use for analysis

Click on `Perform Analysis` to analyse the data.

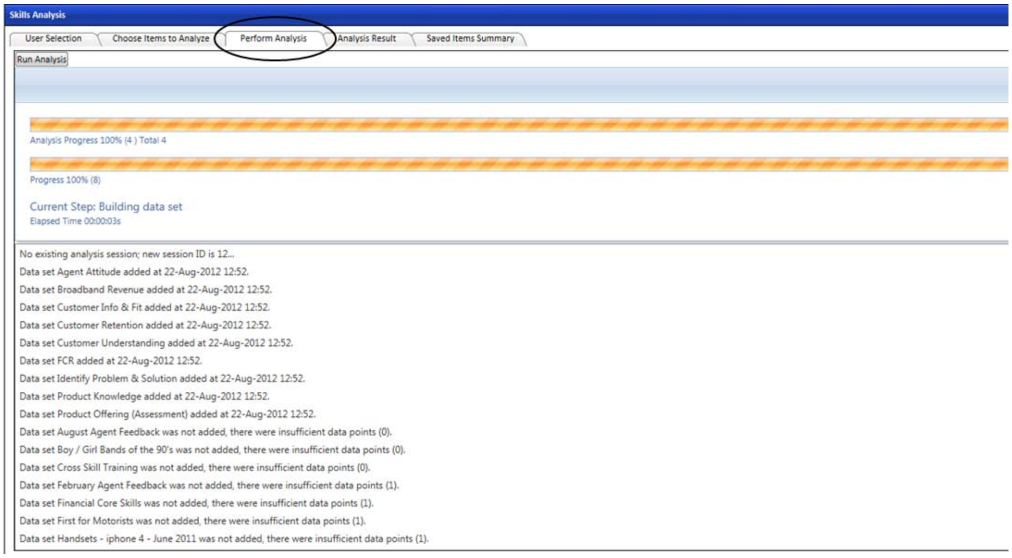


Figure 197: Data analysis

Select `Analysis Result` and three option are then available to view the correlation results. In the example below this view is `Best Correlations`**.** The higher the correlation the stronger the influence on the output.

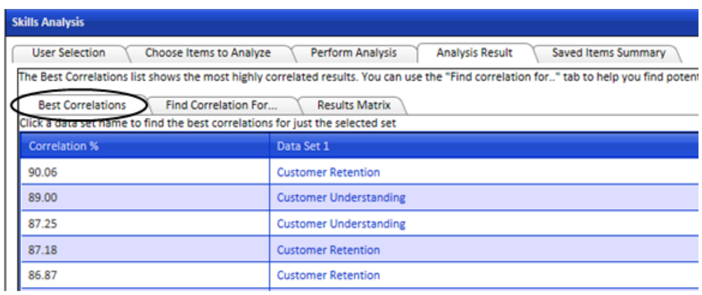


Figure 198: Analysis results

The `Find Correlation For·` allows a specific data set to be selected to view the correlation results.

Use the drop down box to select a specific data set to view.

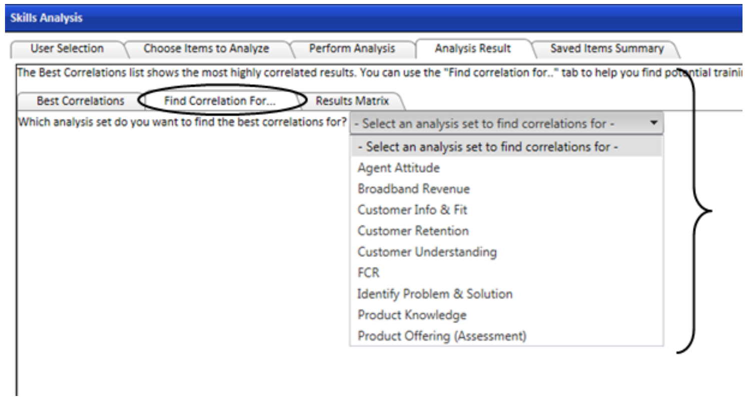


Figure 199: Viewing correlation results for a specific data set

In this example Broadband Revenue has been selected with all correlation results visible.

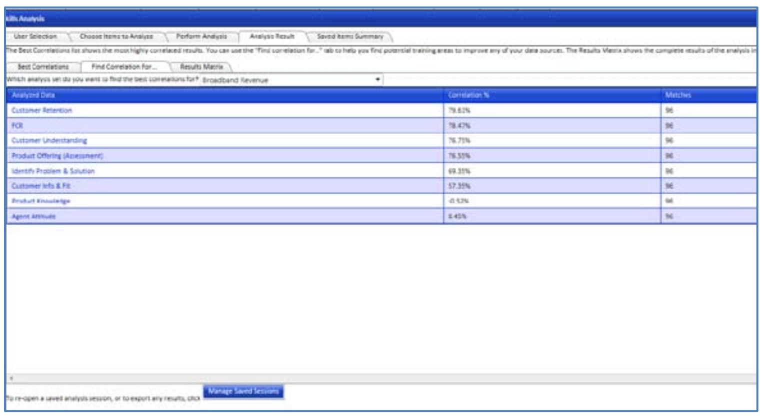


Figure 200: Viewing correlation results for a specific data set

The third option is to to view the `Results Matrix` as a heat mat view with the highest correlation results being highlighted in green.

Figure 201: Results matrix

To select users for training based on the correlation results, click on the analysed data and a separate window is presented to select the number of users based on results.

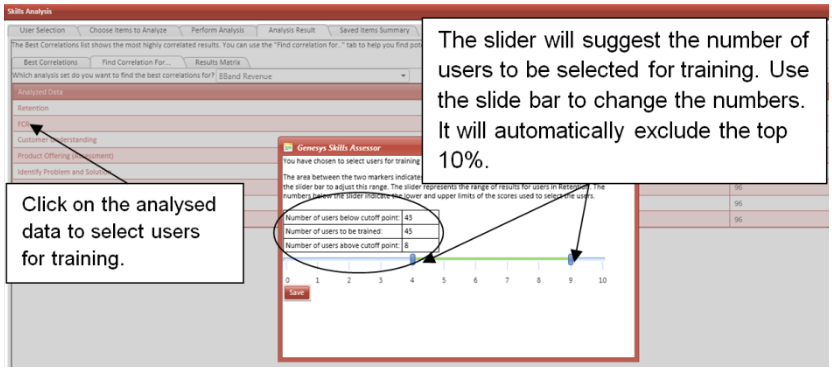


Figure 202: Selecting users for training based on results

Once the users have been selected click on `Save` to save that training plan and give the new plan a name if required then click `Save`. The saved training plan will then be available to view or export the details out by selecting `Manage Saved Sessions`. This will then reveal the user names that have been selected against the training plan.

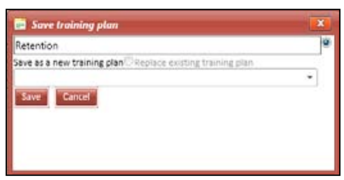


Figure 203: Saving the training plan

Appendix 1: Optional components

Skills Assessor includes several additional components that provide the ability to:

- Automatically import DNA KPI data via the `DNA Import Service`.
- Automatically assign learning items to users via the `Learning Item Auto-Assignment` application.
- Automatically calculate the correlation between KPIs and learning items via the `Learning Item Auto-Ranking` application.
- Allow administrators to create JZero LMS learning items and assign them to users via the `JLMS Learning Item Integration` functionality.

Please see the install/upgrade guide for installation instructions.

DNA Import Service

Once you have installed and configured this service it will be possible to automatically import new KPI spreadsheets by copying them into the folder of your choice. The setup of this service requires the definition of a KPI import folder (e.g. “C:\KPI_Imports”) and an archive folder (e.g. “C:\KPI_Archive”). Copying a KPI spreadsheet into the import folder will cause the service to automatically import the data into Skills Assessor and then move the file into the archive folder. The file will be renamed prior to being moved to the archive folder in order to prevent naming conflicts. This removes the need to import KPI data manually through the Skills Assessor `Manage KPI` page.

Notes: This service is not currently supported within an Active Directory (Secure Token Service) based environment.

Learning Item Auto-Assignment Application

The Learning Item Auto-Assignment application can be used to automatically assign recommended learning items to users based on their DNA scores. This removes the need for administrators to manually and assign learning items that fall into users’ `recommended` ranges. Follow the steps below to install the application.

This application should be installed on a server and set to run on a defined schedule (as per the installation guide). The application is not interactive since it takes its inputs from the Skills Assessor database.

Learning Item Auto-Ranking Application

Learning items can be associated with DNA components. A priority can be assigned to the DNA component-learning item association. This priority can either be defined by admins manually or automatically by the auto rank calculation application.

The auto rank calculation application correlates learning item results (e.g. assessments) with DNA component scores. Items are ranked highly if there is a positive correlation between a learning item's scores and a subsequent improvement in the associated DNA component score. Items that have a weak or negative correlation are left un-ranked by the application.

This application should be installed on a server and set to run on a defined schedule (as per the installation guide). The application is not interactive since it takes its inputs from the Skills Assessor database.

JLMS Learning Item Integration

The JLMS learning item integration feature allows Skills Assessor administrators to assign Skills Assessor assessments to JZero LMS users. These assessments can then be viewed and launched from the JLMS.

To create a JLMS learning item:

1. Click on the `Learning Items` page
2. Click the `Create Learning Item` link
3. Select `JLMS Course` from the `Type` select box.
4. Once you have selected a course
5. Three additional dropdowns will appear allowing you to select a category, curriculum and a course. It is necessary to select these items in order, i.e. category first, then curriculum and, finally, a course. However, once you set a category, the selection of a curriculum will become optional.
6. Click `Save` to complete the creation of the learning item.

JLMS learning items can be assigned to users and DNA components in the same way as other learning item types.

Note: the option to create a JLMS course learning item will only be available if the user who is logged in is mapped to a valid JLMS user (via the user field defined for the LMS integration feature). Similarly, JLMS course learning items can only be assigned to valid JLMS users.