

Genesys Skills Assessor 8.1.127

Administrator Guide

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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 <u>Genesys documentation website</u>

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

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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 <i>Genesys</i> <i>Migration Guide</i> for more information. Do <i>not</i> use this value for this option. A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where <i>x</i> stands for
Monospace font (Looks like teletype or typewriter text)	All programming identifiers and GUI elements. This convention includes:The <i>names</i> 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

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**.

Welc	ome	
To log	gin, enter your User N	Name and Password below
0	These details are case-se	nsitive
	Enter Your Details	
	Select Tenant	Blue 💌
	Login ID	
	Password	
		Continue
0	Trouble logging in?	
	vebsite uses a Cookie to remember you ot be able to login	r login details. If your browser is unable to accept Cookies, you
To tη	y and remedy this, check that your brow	vser is able to accept Cookies, or try clearing your Cookies cache.

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.

Inter User 4 MyDecologneet Mode statement (by Group)issuament (by Date) Scientyde of Mode Statement (by Group)issuament (by Date) Option (b) Option (Search Navigation 💌 🗲	My Development			
Message Regions Assemmets (by Gree)	User				
Second		Assessments (by Group) Assessments (by Date)			
Notion 000 000 Advisitation 0.00			Date By	% Complete	%Average
Inclusion Inclusion <t< td=""><td></td><td>Individually Assigned Assessments</td><td></td><td>0.00</td><td>0.00</td></t<>		Individually Assigned Assessments		0.00	0.00
Learning Reparting Magna Magna Magna Magna <td>Administration</td> <td>ECH Feedback</td> <td></td> <td>0.00</td> <td></td>	Administration	ECH Feedback		0.00	
Assentions Reporting Marga Magnatian Assent Assentian Assentian Statistic Statis Statistic Statistic Statistic Statistic Statis S	Branding				
Reporting Ver Reports Mage Reports Report Reports Mage Reports Report Reports Mage Reports </td <td></td> <td></td> <td></td> <td></td> <td></td>					
Wee Reprin Mage Reprins Reprint Reprint State Reprint Reprint Amont Reprint Amont Reprint Reprint Reprint Reprint Reprint State Reprint Reprint Reprint Reprint State Reprint Reprint Reprint State Reprint Reprint Reprint Reprint Reprint State Reprint Reprin Reprint Reprin Reprint Reprint Reprin Reprint Reprint Reprin Rep	System Data				
Mager Regins Regins Regins Star Regins Regins Antime Regins Antime Regins Regins Regins Testans Regins Bittle Regins Star Regins Star Regins Bittle Regins Star Regins Top Regins Star Re	Reporting				
Advantagenda Advantagenda Advantagenda Advantagenda Advantagenda Advantagenda Resets Statultafeora Advantagenda Kontaget hudge Nadje Nadje Advantagenda Kontage Nadje Nadje Nadje Advantagenda Kontage Nadje Nadje Nadje Advantagenda Kontagenda Advantag	View Reports				
Sele Sele Amon Reparts Sele Amon Reparts Sele Sele Sele	Manage Reports				
Admin Arguns Feddam Katuli Arguns Konslega Mudje Kator ORA Bills Analys Bills Analys Bills Analys Tar OMA Areas Tar OM	Report Categories				
Markan Kanada Kaga Kaga Kaga Kaga Kaga Kaga Kaga K					
Kosakaga hudga huga faqaat DNA Bills Analysis Bills Analysis Tay DNA Agencia Van Finanse DNA	Admin Reports				
DNA SUID-Analysis Suid-Shalpsis Tap DNA-Bandis Tap DNA-Bandis Wann Filmand DNA.	Feedback Results Report				
Sills Analysis Sills Revis Trig OMA period Van Hinard DMA	Knowledge Nudge Report				
Sinte Revise Trig DMA Agents Van Hinner DMA	DNA				
Top DMA Agents Here Hanerd 2014	Skills Analysis				
View Pittered DNA	Skills Route				
	Top DNA Agents				
UserField Mappings	View Filtered DNA				
	User Field Mappings				
Your DNA Mapping	Your DNA Mapping				
system	System				
System Settings	System Settings				
Massaging Log	Messaging Log				
Rest	About				

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.

arch Navigation	Users & Hierarchy			
User	Administration \rightarrow System Data \rightarrow Users & Hierarchy			
Administration	Top level position empty	+ Users in position Staff	First Name	Last Name
Branding Licensing	empty in: Director Sarah Abbett	Blue07	Stanley	Dawson
System Data Feedback Deployment Models	Danietle Atmutbong	Search for user:	100	
Assessmenta	a) Staff	Login ID	First Name	Last Name
Certificates	Junny Cooper	5/ue10	Alex	Evens
Groups	G- Staff	Atue11	Jean	Ferguson
Krewledge Nudges	a Sall	8/Ge12	Amanda	Foster
Roles & Widgets	Maureen Drake	Bioe13	Gary	Galloway
Users & Hierarchy	al Sull	81ve14	Rebecca	Green
Disk.	Bruce Edwards	Bise15	Joe .	Hamis
Report Festa	ei Staff	Blue16	Kathryn	Hutchinson
Import Hierarsha	Alex Expits	Blue17	Lloyd	ingram
KPIDeta	Staff Jean Ferguisen	8/ve18	Brenda	Invin
Import Templates	a Staff	Blue19	Stacey	Jefferson
Reporting	Amanda Poster	K K 1 2 3 4 5	5 6 🕨 🖬 Page Size 10 💌	Page 2 of 6, items 11 to 20 of 5
DNA	Gary Galloway			
System	al Staff Rebecca Green			
	(a) Staff Joe Harris			
	(a) - Staff Kathryn Hutzhinson			

Figure 3: Hierarchy Management

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

Director Sarah /		
	inager	
	- <	New Position
±	Stat	Rename
	Jimi 🗙	Remove Position
+	Stat	Edit user details
	Star	Edit üser details
+	Staf	Refresh
	Maureen	Drake
+	Staff Bruce Edv	words
	Druce Edi	wards

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.

∃ Manager Danielle Armst	rong	
	New Position	
	Rename	
🛨 Staff 🗙	Remove Position	
Mau	Edit user details	
	Refresh	
Bruck	0102	
H Staff Alex Evans		

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.

Top level position	 Users in position Manual 		
empty	Login ID	First Name	Last Name
al Director Sarah Abbott	6/ue02	Danielle	Armstrong
G Manager	Search for user	60	
isi Staff	Login ID	First Name	Last Name
Jimmy Cooper	Biue10	Alex	Evans
Staff Stanley Dawson	Bluell	Jean	Ferguson
n Staff	Blue12	(Add selected user(s))	
Maureen Drake	6/ue13	Find user in hierarchy	Galloway
E Staff	Blue14	Kebecca	Green
Bruce Edwards	Blue15	Joe	Harris
a- Staff	Biue16	Kathryn	Hutchinson
Alex Evans	Blue17	Llayd	ingram
(a) Staff Jean Perguson	Blue18	Brenda	Invin
	Blue19	Stacev	Jefferson
Amanda Foster	14 4 1 2 3 4	5 6 F Fi Page Size 10 💌	Page 2 of 6, items 11 to 20 o
a Staff		types treas	

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.

OCreate New User	Edit Users Assign Assessm	nents	
Sarah Abbott (Blue01)	Lo	ogin ID	Blue60
	Fir	irst Name	Tony
	La	ast Name	Jagger
	jol	b title	
	de	epartment	
	sit	ite	
	Ne	ew Password	
	Co	onfirm Password	
	Is	user archived?	
	C	Cancel	Create

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.

										Product			
		Employee								Knowledge	Agent	Customer	Identify
Firstname	Surname	number	Manager	Position	Region	Location	Team	Company	Date	(Assessment)	Attitude	Info Fit	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	Iporras	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	Iramirez	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	Iwang	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	Ispencer	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	Ihammind	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
lan	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	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	4	3	6	10
Kim	Lewis	klewis	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	6	6	5	3
Ben	Lin	blin	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	1	3	7	10
Pele	Lolani	plolani	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	2	10	4	3
Rebecca	Lorraine	rlorraine	Ispencer	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.

Selected File:	Optimizer-Hierarchy-Blue.xls	Desition ID has to be
User Hierarchy field Mappings Please select the columns from your data so which hold the data for fields specified belo	w:	Position ID has to be unique and therefore could be the user or Login ID.
Position ID field:	Please Select V	-
Position Description field:	Please Select 🗸	If password aren't
Line Manager field:	Please Select 🗸	included in the import
Password	Please Select 🗸	spreadsheet then
User field Mappings Please select the columns from your data so which hold the data for the user fields in Op		select which data set the individual will use as their login password.
User Field	Field to Map	P
Login ID	Please Select 💙	
First Name	Please Select V	
Last Name	Please Select V	
Job Title	Please Select V	
Department	Please Select V	
Site	Please Select	
Import		

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.

$Administration \rightarrow System Data \rightarrow Ro$	les & Widgets	
List of roles		
	User Count	Widget Count
Filt	er	
Administrator	2	39
Manager	5	0
Trainer	0	0
User	51	2

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.

	User Count	Widget Count				
Administrator	Filter	1922				
	2	39				
Manager Trainer	0	0				
User	51	2	To manually add			
sers in role Manage	er		additional users to a			
Search Hierard	chy Go		role role right click and select Add.			
rch for user				Login ID	First Name	Last Name
rch for user:	Go		and select Add.	Login ID alue01	First Name Sarah	Last Name Abbott
rch for user	Go First Name		and select Add.		0.00000000	
rch for user	Go First Name Sarah		and select Add. Last Name Abbott	8lue01	Sarah	Abbott
rch for user:	Go First Name Sarah Danielle		and select Add. Last Name Abbott Armstrong	Blue01 Blue02	Serah Daniell e	Abbott Armstrong
rch for user: ogin ID ue01 ue02 ue03	Go First Name Sarah Danielle Boris		and select Add. Last Name Abbott Armstrong Badmin	Blue01 Blue02 Blue03	Sarah Danielle Bill	Abbott Armstrong Barker
rch for user:	Go First Name Sarah Danielle Boris Bill		and select Add. Last Name Abbott Armstrong Badmin Barker	0/ue01 8/ue02 8/ue03 8/ue04	Sarah Danielle Bill Ted	Abbott Armstrong Barker Bond
arch for user ogin ID lue01 lue02 lue03 lue04 lue04	Ga First Name Sarah Danielle Boris Bill Ted		and select Add. Last Name Abbott Armstrong Bedmin Barker Bond	0/ue01 8/ue02 8/ue03 8/ue04	Sarah Danielle Bill Ted	Abbott Armstrong Barker Bond
Search Hierard arch for user Jogin ID Nue01 Nue01 Nue03 Nue03 Nue04 Nue05 Nue05 Nue05	Ge First Name Sarah Danielfe Boris Bill Ted Samuel		and select Add. Last Name Abbott Armstrong Bedmin Barker Bond Chapman	0/ue01 8/ue02 8/ue03 8/ue04	Sarah Danielle Bill Ted	Abbott Armstrong Barker Bond

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.

	User Count	Widget					
Filt	2	Count					
Administrator	2	39					
Manager	5	0					
Trainer	0	0					
User	51	2					
Search Hierarchy IG	2						
	a						
arch for user:	9 First Nan	ie	Last Name	Login ID	First Name	Last Name	
erch for user:		1e	Last Name Abbott	Login ID Blue01	First Name Sarah	Last Name Abbott	
arch for user: 6 ogin ID ilue01	First Nan	1e					
arch for user (6 ogin ID lue01 hue02	First Nan Sarah Danielle Boris	te	Abbott Armstrong Badmin	Blue01	Sarah	Abbott	
inch for user.	First Nan Sarah Danielle Boris Bill	1e	Abborr Armstrong	Blue01 Blue02	Sarah Danielle	Abbott Armstrong	
inch for user(g ogin ID use01 use03 use03 use04	First Nan Sarah Danielle Boris Bill Ted		Abbott Armstrong Badmin Barker	Blue01 Blue02 Blue03	Sarah Danielle Bill	Abbott Armstrong Barker	
inch for user(g ogin ID lue01 hue05 hue05 hue05	First Nan Sarah Danielle Boris Bill Tccl Samuel	Add s	Abbott Armstrong Bedmin Barker selected user(s)	Blue01 Blue02 Blue03 Blue04	Sarah Danlelle Bill Ted	Abbutt Armstrong Barker Bond	
rch for user(6	First Nam Sarah Danielle Boris Bill TCC Samuel Jimmy	Add s	Ahborr Armstrong Bedmin Barker selected user(s) user in hierarchy	Blue01 Blue02 Blue03 Blue04	Sarah Danlelle Bill Ted	Abbutt Armstrong Barker Bond	
inch for user: 6	First Nam Sarah Danielle Boris Bill Teo Samuel Jimmy Stanley	Add s	Ahbott Armstrong Badmin Barker selected user(s) user in herarchy Daeson	Blue01 Blue02 Blue03 Blue04	Sarah Danlelle Bill Ted	Abbutt Armstrong Barker Bond	
	First Nam Sarah Danielle Boris Bill TCC Samuel Jimmy	Add s	Ahborr Armstrong Bedmin Barker selected user(s) user in hierarchy	Blue01 Blue02 Blue03 Blue04	Sarah Danlelle Bill Ted	Abbutt Armstrong Barker Bond	

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.

Search Hierarc	hy	
Search for user: Edwards	Go	
Login ID	First Name	Last Name
Blue09	Bruce	Edwards
	Page Size 10 🔻	Page 1 of 1, items 1 to 1 of 1

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.

Users in role Manager Search Hierarchy Search for user:	Go	To find a specific user in the hierarchy, right click on the indivi and select Find User in hierarchy	
Login ID	First Name	Last Name	
Blue18	Brenda	Irwin	
5006	Glenda	James	
Blue19	Stacey	Jefferson	
Blue20	Megan	Add estad user(c)	
Blue21	Lauren	Add selected user(s) nnedy	
Blue22	Walter	Find user in hierarchyight	
Blue23	Arnold	Lawrence	
Blue24	Eva	Lewis	
Blue25	Mary	Marshall	
5015	Mary	Miller	
i i i i i i i i i i i i i i i i i i i	Page Size	10 Page 3 of 7, items 21 to 30	of 66

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.

	User Count	Widget					
		Count					
	Filter						
Administrator	2	39					
Manager	5	0					
Trainer	0	0					
User	51	2					
Jsers in role User							
Search Hierar							
earch for user:	Go						
Login ID	First Name		Last Name	Login ID		First Name	Last Name
Blue01	Sarah		Abbott	Blue01		Sarah	Abbott
Blue02	Danielle		Armstrong	Blue02		Danielle	Armstrong
b	Boris		Badmin	ь		Boris	Badmin
Blue03	8111		Barker	Blue03		0(1)	Barker
Blue04	Ted		Bond	Blue04		Ted	Bond
Blue05	Samuel		Chapman	Blue05		Samuel	Chapman
Blue05	Jimmy		Cooper	Blue06		Jimmy	Cooper
Blue07	Stanley		Dawson	Blue07		Stanley	Dawson
BlueOB	Maureen		Drake	Blue08		Maureen	Drake
Blue09	Bruce		Edwards	Blue09		Bruce	Edwards
H 4 1 2 3 4	5 6 F Fl Page S	lze 10 -	Page 1 of 6, items 1 to 10 of 56	14 4 1 2	3456 1	H Page Size 10 -	Page 1 of 6, items 1 to 10 of 5
	50						
Vidgets in role Use							
earch for:	Go						
Widget Name	Description			Widget Name	Description		
About	Display the about screen	for this application		My Development		ress through the assessments that h	we been assigned to you, and take any that are
Admin Reports	View reports on users ac	ross the entire organi	sation	Harry Dara-Iter	outstanding		
Branding	Change various branding	roptions		User Results Report	Report on Indiv	idual or team scores for your subor	Sinates
Change Password	Change your password			Distance.			
DNA User Field Mapping	Map user fields to Skills	ONA filters					
Feedback Deployment Models	Create and manage feedb managers, peers and sub		is to define the way feedback is distributed to users,				
Feedback Results							

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.

earch for: Go		
Widget Name Description	Widget Name	Description
AboutDisplay the about screen for this application	My Development	View your progress through the assessments that have been assigned to you, and take any that are
Admin Reports Q Add to role iss the entire organisation	No. of the second se	outstanding
Branding Change various branding eptions	User Results Report	Report on individual or team scores for your subordinates
Change Password Change your password		
DNA User Field Map user fields to SkillsDNA filters		
Feedback Deployment Create and manage feedback deployment models to define the way feedback is distrib Models managers, peers and subordinates.	uted to users,	

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.

About	Admin Reports	Branding	Change Password	Feedback Deployment Model
Feedback Results Report	Import Hierarchy	Knowledge Nudge Report	Ucensing	Manage Assessments
Manage Certificates	Manage Groups	Manage Import Templates	Manage Knowledge Nudges	Manage Report Calegories
Manage Reports	Manage Roles & Widgets	Manage System Settings	Manage Users & Hierarchy	Messaging Log
My Development	Reset Tests	SkillsRoute	User Results Report	View Reports

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.

List of roles		User Count	Widget Count
	Fil	ter	
Administrator		2	39
Manager		5	0
Trainer			•
User	(C) N	lew Role	
USEI	🧞 R	lename	
Users in role	× R	temove Role	

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.

System Settings				
System $ ightarrow$ System Settings				
User Fields Field Mapping	gs Widgets General Settings			
To rearrange the order of the fields, cl	lick and drag one of the green up-down icons ($ ho ho$) up or down the table.			
Login ID 1	14			
First Name 1	ļi l			
Last Name 1	14			
🗙 🛛 Job Title 🛛 1	14			
X Department 1	14			
🗙 Site 1	👔 Enter any additional			
	user fields here.			

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.

System $ ightarrow$ System Setting	S		
User Fields Fi	ield Mappings Widg	ts General Settings	
Widget Name	Description	URL	
			0

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.

User Fields Field Mappings Widgets	General Settings
Analysis min data points	30
AICC Student ID Field	Login ID
AICC Suppress Put Param	false
CSV Extension	CSV
Pass Text	SUCCESSFUL
Fail Text	UNSUCCESSFUL
Kite Diagram Enabled	
Assessment Defaults	
Combined Tests require signing with a password	
Message Manager on Assessment Completion	
Email Field	Email
	Save Changes

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.

Groups	
Administration $ ightarrow$ System Data	ightarrow Groups
List of groups:	User Assessment Count Count Filter
Right click to make a new	group
	New Group
	Rename
×	Delete 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.

Groups						
Administration \rightarrow System Da	ata $ ightarrow$ Groups					
List of groups:	User Assessment Count Count		Users Assess Users in group Trainers	ments		
Trainers	4 0		Login ID	First Name	Last Name	
		-	Blue46	Rosemary	Wright	
			Blue47	Willie	Xander	
			Blue48	Kim	Yates	
			Blue49	Annette	Young	

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.

Users Assess Users in group Trainers	ments		
Login ID	First Name	Last Name	
Blue46	Rosemary	Wright	
Blue47	Willie	Xander	
Blue48	Kim	Yates	
Blue49	Annette	Young	
Search Hierar Gearch for user:	Go		<u> </u>
Login ID	First Name	Last Name	
Blue01	Sarah	Abbott	
Blue02	Danielle	Armstrong	
b	Boris	Badmin	≡
Blue03	Bill	Barker	
Blue04	Ted	Bond	
Blue05	Sa Add selected user(s)	Chapman	
Blue06	Jir Find user in hierarchy	Cooper	
01 07			

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.

ist of groups:	User Count Filter	Assessment Count	Users Assessments Assessment in group Trainers		
rainers	4	0	Assessment	Available From	Until
Magnification (112		No records to display.		

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.

Users	Assessments	
Assessment in g	group Trainers	
Assessment	Available From	Until
ECH Feedback	Elear	Clear
Search for:	Go redback	

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.

Users Assessment in gro		ssme rainer												
Assessment			-	A۱	ailab	le Fro	om				Ur	ntil		
ECH Feedback									🖽 Clear					C
recoback	44	•		May	2013		•	**						
Search for:		S	м	Т	W	т	F	S						
🛨 📲 📊 ECH Fee	18	28	29	30	1	2	3	4						
	19	5	6	7	8	9	10	11						
	20	12	13	14	15	16	17	18						
	21	19	20	21	22	23	24	25						
	22	26	27	28	29	30	31	1						
	23	2	3	4	5	6	7	8						

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.

My Development			
User → My Development			
Assessments (by Group) Assessments (by Date)			3
Group Name	Date By	% Complete	Maverage
Individually Assigned Assessments		0.00	0.00
ECH Feedback		0.00	

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.

t of groups: User Assessment Count Count	Users Asses Users in group Trainers	sments	
ainers 4 1	Login ID	First Name	Last Name
	Blue46	Rosemary	Wright
	5/ue47	Willie	Xander
	Blue48	Kim	Yates
	Blue49	Annette	Young
	ig St y g St g St g St g St g St g St g Mana g Mana	Add user(s) in this position aff Add user(s) in all subpositions and end	8

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.
- Import/Export import existing assessments, export an assessment to share or export for use in an LMS

Administration $ i $ System Data $ i$ Assessments		
Design	Assessments owned by Everyone who created the assessment (Me and	Search (in assessment and content)
Create Assessment Design Assessment	Existing assessments Everyone options are available)	Additional filters Show additional filters Search
Assign	Assessment Name	Assessment code Date created Feedback only
Assign Assessment	ECH Feedback	8/14/2012 3:21 PM No
Reports	14 4 1 b b) Page Size 10 -	Page 1 of 1, items 1 to 1 of
View Printable Version		
Import & Export		
Import Export Export to AICC package		

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.

EW	First Question 🛛 🥵 Edit. 🖉 Save 🛛 🗶 Cancel					
	Insert "Do Not Know" automatically for Multiple Choice and Pick Correct Questions.					
	Basic Test Navigation Test Reset Knowledge Nudge Certificate Reports					
	Assessment code					
	Introductory text No introductory text					
	Poss mark (%)					
	Is this test timed?					
	Should the user be told that questions are timed?					
	Type of Assessment These Feedback options cannot be changed if the assessment is currently assigned to Users, either individually, by Group, or the Assessment has ever been	taken.				
	is this a Feedback Only assessment?					
	Archival					
	Assessment is archived					

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.

Design Assessment	
III NEW	First Question 🖉 Edit 🖉 Save 💢 Cancel
	Insert "Do Not Know" automatically for Multiple Choice and Pick Correct Questions.
	📠 NEW
	Basic Test Navigation Test Reset Knowledge Nudge Certificate Reports

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.

	Pass mark (%)	↓ ↓
	Is this test timed?	
	Should the user be told that questions are timed?	
	Type of Assessment	
	These Feedback options cannot be changed if	the assessment is currently assigned to Users, either individually, by Group, or the Assessment has ever been taken.
<	Is this a Feedback Only assessment?	
	Select a deployment type	Self only
	Archival	
	Assessment is archived	

Figure 37: Feedback only and Archive Settings

Click on Save when you have finished making changes.

Assessments	
$Administration \rightarrow System Data \rightarrow Assessments$	
E Design Assessment	
	First Question Image: Edit Image: Save Image: Cancel Insert "Do Not Know" automatically for Multiple Choice and Pick Correct Questions. Image: Cancel Image: Cancel

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.

📄 Design Assessment			
	w		
	٢	New Content	
		Copy/Shortcut	

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.

E Design Assessment		
□ 💼 NEW	Previous Content Next Content 📈 Ec	lit 🗹 Save 💢 Cancel
New Content	Insert "Do Not Know" automatically for Mi	ultiple Choice and Pick Correct Questions.
	🕮 New Content	
	Min Amount Of Questions:	0
	Max Amount Of Questions:	0
	Introductory text	No introductory text
	Pass mark (%)	\$
	Can Copy	\checkmark

Figure 40: Assessment Settings

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

📄 Design As	sess	ment		
🖃 📲 NEW				
💷 Nev	w Cor	itent		1
	٢	New Content		
	×	Delete Content		
	?	New Question	•	
		Copy/Shortcut		
				4

Figure 41: Adding Questions to Assessments

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

📄 Design Assess	sment	
⊡∎. NEW		
🛄 New Co	ntent	-
	New Content	
×	Delete Content	
2	New Question	Multiple Choice
	Copy/Shortcut	Pick Correct
		Hot Spot
		Simple Text
		Numeric
		Feedback

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.

📻 Design Assessment		
The Centrel Tree Centrel Tree Multiple Choice Question	Previous Question. Next Question I Litt & Save X Cancel Insert "Do Not Know" automatically for Multiple Choice and Pick Correct Questions. Score 1.00 External URL (e.g. http://www.website.com/Page.html)	
	Multiple Choice Question Only one correct narwer can be selected from a list of possible answers. Both an image and audio or video media may be added to this type of austion. At least one of the answers must specify a percentage of score of 100%. Duestion Text / ITML Duestion Text / ITML Duestion Course Question New Multiple Choice Question Enter the question text.	Upload image Upload Media

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.

	Answer	Percentage of Score	Image	Med
	No possible answers	have been added yet.		
<	Insert New Anse	wer Desert 'Do Not Know'		
	Change Questio	on Type		
	To change this Multiple	e Choice question to a Pick Correct question, click on the link below. You may a	lso change a Pick Correct question to a Multiple Choice ques	tion.
(Change to a Pick Corre	ct question		

Figure 44: Changing Question Types and Adding Answers

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

Enter what % of the overall score the question contributes to.	Image and/or media can also be associated with the question Percentage of Score B I II A < E E E I S I Font Name < Real < I Enter the required question text	
	OK Cancel	

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.
Edit Answer	1	×
Answer Image Media		
Select File Select an image file to upload. The allowed file types are: .jpg, .jpeg, .gif, .png Select	Browse for the required image before	
Click the button below to upload the file.	uploading.	
Click on Upload Image once selected.		



Design Assessment				
NEW	Scroll through previous and — next questions or content.	 now" automatical	 Save Cancel	Click Edit to edit an estions. existing question.

Figure 47: Adding an Image to a Question

Hot Spot Questions

Hot Spot Question		
(1) To set the Hot Spot image, see the area to the right. You may optionally attach audio or video media to this question	An image must be	Upload Image
A Please be aware that changing or removing the Hot Spot image will invalidate and remove your list of answers.	uploaded first to create	oprode mage
Question Text / HTML B I U A • E = I K I Font Name • Real • Rea	a Hot Spot question.	Upload Media
New Hot Spot Question		
Enter the required question text.		
	New Answer	
once the ima uploaded.	ge nas been	
Desian		
Design V FIVIL V Preview		

Figure 48: Preparing a Hot Spot Image Question

Follow the instructions to define the hot spot answer area.

Edit Hotspot Answer	
Define Hotspot Area Top Left Coordinate: - Bottom Right Coordinate: -	Click the Define Hotspot Area box and then the top left hand corner and the bottom right hand corner to define the area.
Percentage of Score	

Figure 49: Defining a Hot Spot Answer Area

📄 Design Assessment					
Edit Hotspot Answer					
Define Hotspot Area					
Top Left Coordinate: 20,24 Bottom Right Coordi	nate: 83,73				
This will create a red bo around the required an selection area.					
Percentage of Score	\$				
V OK Cancel					

Figure 50: Defining a Hot Spot Answer Area

📰 Design Assessment			6
		Hot Spot Question To set the Hot Spot image, see the area to the right. You may optionally attach audio or video media to this question. Measure back hanging or removing the Hot Spot image will invalidate and remove your list of answers. Question Text / HTML B I U A + IF TE TE A + Compared A + Comp	۲
		New Hot Spot Question	Upload Image
		✓ Design O HTML Q Preview	Upload Media
	The answer will then be visible in the question builder. Multiple Hot Spots can be created, however only 1 answer will be	Answer	Percentage of Score
Design-Assessment.aspx?Assessmer	accepted. httD=7	Insert New Answer	
Previous Question	Next Question	🖉 Edit 🖌 Save 🔀 Cancel Click Save to finish edi	ting the question

When creating new Multiple Choice and Pick Correct Questions, add an initial "Do Not Know" answer.

Figure 51: Display of Hot Spot Answer

Simple Text Question

	Simple Text Question	
	Interpret of the correct answer has to be entered into the text box. Both an image and audio or video media may be added to this type of question.	Upload Image
	Question Text / HTML	
	B I U A ▼ 三 三 三 从 小 代 Font Name ▼ Real▼ 図	Upload Media
	New Simple Text Question	
	Design	
After entering the	Answer Percentage of Score	
question text, click on Insert New Answer	No possible answers have been added yet.	
	S Insert New Answer	

Figure 52: Creating Question Text and Adding an Answer

2 Edit Answer	×	1
Answer Text answers can now be entered.		
Use Wild Cards * where all of the text has to be entered into the answer to get 100% or this can be limited to partial words i.e. *Gr*etc.		
V OK Cancel		

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

Edit Answer		
Answer		
Percentage of Score	\$	Enter the
Numeric Range		minimum and
Minimum	Maximum	maximum number
V OK Cancel		the user can enter

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.

Answer			Percentage of Score	
0				<i>i</i>
1			20	, R
2			40	, R
3		1	60	
4	Once the feedback question has been entered, then build the		80	<i>i</i>
5	feedback ratings by entering the		100	
Build Feedback Ratings Minimum 0	minimum and maximum number of ratings required. Select Build to create			
Save Template Feedback Template Name	Save Template Save the ratings cre template for future			

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.

2 Edit Answer	×
Answer	
B I 型 A → 譯 喜 理 说 4 1 1 1 Font Name → Real → 函	
3	
Consign I Design I Design I Preview	
V OK Cancel	

Figure 56: Adding Detail to Ratings

Answer		Percentage of Score
Strongly disagree	The ratings are then associated	0 📈
Disagree	to the question. The ratings	20 📈
No opinion.	can be changed and saved if	40 📈
Agree	required.	60 📈
Strongly agree.		80 📈

Figure 57: Display of Rating Detail and Associated Questions

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

Previous Question	Next Question	Edit	A Sava	Cancel	Click on Edit to access
Frevious Question	Mext Question	Land Cont	J ave		an existing question.

Figure 58: Editing Existing Questions

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

📄 Design Assessment	
⊡∎. NEW	
📄 🛄 New Content	
	Text Ouestion
🖃 🛄 New Cont 본	Delete Question
New Feedba	ck 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.

Save Template	
Feedback Template Name	Save Template
Use Feedback Ratings Template	
Feedback Template 1 🔽 🖓 Use Template	Delete Template

Figure 60: Associating Existing Templates with Feedback Questions

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

sign Assessment		
Feedback Assessment 1	First Question 2007 Edit 2008 X	
	Basic Test Navigation Test	Reset Knowledge Nudge Certificate Reports
	Introductory text	No introductory text
	Pass mark (%) Is this test timed?	
	Should the user be told that questions are timed?	0
	Type of Assessment These Feedback options cannot be changed	d if the assessment is currently assigned to Users, either individually, by Group, or the Assessment has ever been taken.
	Is this a Feedback Only assessment?	
	Assessment is archived	

Figure 61: Accessing Additional Assessment Detail and Options

Test Navigation

st Question 2 Edit 2 Save X nsert "Do Not Know" automatically for Mul Feedback Assessment 1 Basic Test Navigation Test R	tiple Choice and Pick Correct Questions.	Click on Edit to make any changes first	In Order – presents the questions in the order they have been created. Randomly within Content – keeps the content order but
How are questions ordered?	Randomly within Content	Allows users to move forwards and	randomises the questions. Randomly across all Content – questions are presented
Number of questions to choose for test Can users freely navigate through the test?	100 Ç	backwards through the assessment	completely random
Relevant site link			Enter a relevant URL and description to present a
Link description			link in the question text for the user to select.
How would you like the questions to be displayed?	A question per page apart from feedback of	questions 💌	

Figure 62: Test Navigation Tab

Test Reset

		lge Nudge 🔷 Cer	tificate Reports	1
Enable test auto-reset?			llows the assessment i utomatically reset if th	
Number of times to auto-reset	5		ser fails to achieve the equired pass rate. The	
			umber of times this is llowed is also manage	

Figure 63: Automatic Test Reset

Knowledge Nudge

First Question 2 Edit 2 Save 2 Cancel	pice and Pick Correct Questions.	
📠 Feedback Assessment 1		
Basic Test Navigation Test Reset	Knowledge Nudge Certificate R	leports
Assigned Nudge		Assign Selected Nudge Create Nudge
Search Type Tag	Owner Me	Search Term
	Browse for the required PDF document to associate	Search Group by Tag 🔽
Nudge Title	with the assessment or	Nudge Type Date created
There are no Knowledge Nudges to display.	provide an external url.	
I I Page Size 10 V		Page 1 of 1, items 0 to 0 of 0

Figure 64: Associating a Knowledge Nudge URL or PDF

Certificates





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



Use the Import/Export options as required and follow the instructions.

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.

Title	MyURL Knowledge Nudge
Tags	MyURL
	NOTE: Tags are separated by spaces. If the Enter key is used to create a new line, this will be saved as a space.
Nudge Type	URL
Nudge Content	http://www.myurl.com
Is Archived?	NOTE:When Nudges are archived and assigned to an assessment/users they are still viewable to them until they are unassigned Save Cancel

The example below shows a website URL of <u>www.myurl.com</u>.

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.

Nudge Type	PDF (Portable Document	Format)	•
Nudge Content		Select	
	Þ		
	Figure 69: Creating a PI	OF 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.

Insert Hyperlink	CONTRACTOR OF STREET, STRE		? X
Link to:	Text to display: < <selection document<="" in="" td=""><td>>></td><td>ScreenTi<u>p</u></td></selection>	>>	ScreenTi <u>p</u>
Existing File or Web Page Place in This Document Create New Document E-mail Address	Select a plage in this document: First Slide Last Slide Next Slide Previous Slide Slide Titles 1. Slide 1 2. Slide 2 Guide 3 Custom Shows	Slide preview: MERGENCY EXITS United and the sum of the set of the sum of the set of t	Cancel

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.

P Save As	owledge Nudges		Training Library States		← Search Knowledge Nud ♀
Organize 👻 Nev	v folder				≣ - 0
 Microsoft Power Workspaces Favorites Desktop Downloads Dropbox Recent Places 	Po Name	*	Date modified No items match your se	Type	Size
File name:	cityLINK Airlines Flight Safe	ty			•
Save as type:	PDF				•
Authors:	Brian	Tags:	Add a tag		Title: PowerPoint Presentation
	Options		 Standard (publishin online and printing) Minimum size (publishing online) 		
lide Folders				Tools 🔻	Save Cancel

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.

Activation Setting	s
Ena <u>b</u> le When:	The page containing the content is visible
Disable When:	The page containing the content is not visible
Playback Style:	Play content on page
<u>W</u> idth:	320 F Height: 240 F

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.

Feedback Assessment 1

Hello Sarah Abbott

Knowledge Nudge

Please View Before Accessing the Test



How to navigate

You may freely navigate through this assessment.

You may freely navigate backwards and forwards through the questions in this assessment. Therefore you may choose to skip over questions you want to answer later.

A Navigator will be displayed for your convenience. This will summarise all the questions in the assessment, and allow you to easily skip back to any unanswered questions.

Audio & Video

This assessment may contain audio or video media.

Please make sure that you can hear the audio clip by clicking the play button. You should hear a short clip of a telephone ringing.





Figure 77: Mandatory pre-assessment attachment

First Question 🛛 📈 Edit 🖌 🖌 Cancel			
Insert "Do Not Know" automatically for Multiple Cho	ice and Pick Correct Questions.		
💼 Feedback Assessment 1			
Basic Test Navigation Test Reset	Knowledge Nudge Certificate	Reports	
Assigned Nudge		Assign Selected Nudge	Create Nudge
Search Type Tag	Owner Everyone 💌		Search Term
			Search
			Group by Tag
Nudge Title		Nudge Type	Date created
Knowledge Nudge 1			5/28/2013 10:04 AM
Id d 1 b bl Page Size 10 V		Page 1 (of 1, items 1 to 1 of 1

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.

$Administration \to DNA \to Learning Items$			
Design Create Learning Item Edit Learning Item Delete/Archive Learning Item	Learning Items Owned By Me	Search Learning Items 🔍 🗌 Show additional filters	
	Learning Item	Туре	Date created
Assign	wikipedia	E-Learning URL	6/5/2013 1:58 PM
Links to DNA Components	Knowledge Nudge 1	Knowledge Nudge	6/10/2013 9:41 AM
Reports	H A 1 P Page Size 10	-	Page 1 of 1, items 1 to 2 of 2

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.

E Learning Item		
Type:	Assessment	
Select an Assessment	Type Assessment name or select from dropdown	•
	Save Cancel	

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.

Properties Le	earning Items						
Available Learning It	ems 💌 Add						
Learning Item	Туре	Manual Priority	Auto Priority	Min range	Max range	Date created	
Learning Item wikipedia	Type E-Learning URL	Manual Priority	Auto Priority	Min range 0	Max range	Date created 6/5/2013 2:01 PM	Remove

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 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.

View Users Developme	nt Plan(s)		×
User Development Report	for: Sarah Abbott	6/5/2013 2:27:02 PM 💌 Save as PDF]
Learning Item Name	Learning Item Text	Available From Available To	
wikipedia	http://www.wikipedia.org	05/01/2011 07/08/2013	
			1
Back			

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.

Type of Assessment These Feedback options cannot be changed i	if the assessment is currently assigned to Users, either individually, by Group, or the Assessment has ever been taken.
Is this a Feedback Only assessment?	V
Select a deployment type	Self and Manager 💌
	☑ Only require user feedback before combined test? ⁽¹⁾

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.

Assessments (by Group)	Assessments (by Date)	Feedback On Other Users (4)			
Assessment Name			Providing Feedback On	Date By	% Complete
Feedback Assessment 2			Danielle Armstrong		0.00
Feedback Assessment 2			Bill Barker		0.00
Feedback Assessment 2			Ted Bond		0.00
Feedback Assessment 2			Samuel Chapman		0.00

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

Administration $ ightarrow$ System Data $ ightarrow$ Users & Hierarchy				
S Optimizer				- 0 6
Create New User	Edit Users Assign Assessments	1		
Danielle Armstrong (Blue02)	Assessment	Available From	Until	
	ECH Feedback	Clear	Clear	
	Feedback Assessment 1	Cear	Cear	
	Feedback Assessment 2	Clear	Clear	~
	a) the Cross skill training a) the ECH Feedback (a) the Feedback (a) the Feedback Assessment 1 (a) the Feedback Assessment 2 (b) the Feedback Assessment 2 (c) the Feedback Assessm			

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.

Edit Users Assign Assessments		
Assessment	Available From	Until
ECH Feedback	Clear	Clear
Feedback Assessment 1	Clear	Clear
Feedback Assessment 2	III Clear	📰 Clear 🗸
Search for: Go 🖃 📲 Cross skill training		^
ECH Feedback Feedback Assessment 1 Feedback Assessment 2 Financial C Add assessment to user Marketing Core Skills Mobile Phones Sales Core Skills Tur Training Feedback	Right click on the required assessment and click 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.





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).

Assessments (by Group) Assessments (by Date) Feedback On Other Users (4)	
Group Name	Date By
Individually Assigned Assessments	
ECH Feedback	31/05/2013
Feedback Assessment 1	12/06/2013
Feedback Assessment 2	16/08/2013

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

id users.
2

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.

eset Tests	- Depart Tests						
				second with the this palastad data second will		the ones to reset and click the button to reset the selected assessments for	a the colored of
[No group selection] Agents	Type to filter: 1 assessment(s) selected for reserved From		t can be	Type to filter: 2 user(s) selected for reset.	appear on the right, sele	the ones to reset and click the button to reset the selected assessments for	r the selected u
Trainers	01-Jan-2009	28-May-2013	THE .	Select All	Deselect.all		
	100			Rosemary Wright (Blue46)			
	CH Feedback			[2] Wille Xander [6]ue47]			



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.

Certific	ates	
Administrati	on $ ightarrow$ System Data $ ightarrow$ Certificates	
Show inac	tive certificates	
Edit	Certificate name	
There are no	certificates currently defined. Click here to create one.	

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.

Edit	Certificate name	
+ 🗙		

Figure 93: Setting certificate name

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

Show in	active certificates
Edit	Certificate name
/	Mobile Phones Certificate 1

Figure 94: Saving certificate name

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

Show inactive certificates			
Edit	Certificate name		
×	Mobile Phones Certificate 1		

Figure 95: Confirming changes to certificate details

Click the $\boxed{\checkmark}$ icon to confirm your changes. If you wish to cancel your changes you can select the $\boxed{\checkmark}$ 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.

Edit	Certificate name	
1	Mobile Phones Certificate	1
		New Certificate
		Rename
		Design
		Create a copy
		Deactivate

Figure 96: Designing certificate content

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

Toolbox	_
	1

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

efgh Ijkl

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.

Right-click to edit		
	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.

Right-click	to edit	
	Edit i	tem
	Delete	e

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.

📄 Upload Certificate Image		×
Select a new image:	Choose File No file chosen	
	Save	

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.

Feedback Assessment 2	First Question 📈 Edit 🖌 Save 🔀 Cancel
📲 📲 New Content	Insert "Do Not Know" automatically for Multiple Choice and Pick Correct Questions.
New Feedback Question	Feedback Assessment 2
	Basic Test Navigation Test Reset Knowledge Nudge Certificate Reports
	Create a certificate on test pass?

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 certificate 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.

Select an assessment that you have a certificate for, then click the certificate to view/print it.				
Assessments:	Certificates:			
Example Iphone Assessment	Insurance Complaince Certificate - 05/08/2011 11:43:25			
	Insurance Complaince Certificate - 05/08/2011 11:56:00			

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.

Knowledge Nudge Report					
Reporting \Rightarrow Knowledge	Nudge Report				
Report Filters:		28-Apr-2013 28-May-2013		The selected position only Ointo the hierarchy 1 + level(s) down Export	
Director				The report needs to be rebuilt to reflect your selections Rebuild report	
I Select All					

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.

Chartings Users																
Visits																
Total Duration										®Us ⊜Nu	er					
Average Duration										0.00	oge					
	Same Value P	Inclosed											1			
	Same value r	resigns i											J			
							Number Of	Visits								
	0 0.1	0,2	0,3 0,4	0.5	0.6	0.7	0,8	0,9	1	1.1	1.2	1.3	1.4	1.5	1.6	1.7
			-			-			-	-		-		-		-
deno de	mo -			1					1							
		_														
																_

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.

The selected position only into the hierarchy	Export
The report needs to be rebuilt to reflect your selections Rebuild report	
	○ into the hierarchy 1

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.

Reporting \Rightarrow User Resul	Its Report				
Report filters.	Start Date 28-Apr-2013 End Date 28-May-2013		The selected position only The selected position only into the hierarchy 1 to level(s) do	wn	Expor
Director (Sarah A) Manager (Da Manager (Da Manager (Ea Manager (Te Manager (Sar Sara) Select All Feedback Assessment	d Bond) muci Chapman) (empty)	♥ Feedback Assessment 2 ♥ New Content New Feedback Question	0011006 0051006 0051006	100%	

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.

Click here to select data for the select data	The selected position only \mathbb{O} into the hierarchy $1 $ vel(s) down	Assessment result export. Export
exporting.	85.00%	
	85.00%	
	85.00%	

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.

Reports

Feedback Results Repo	ort		
$Reporting \to FeedbackResultsReport$			
Report Filters	Start Date 28-Apr-2013		Export
(3) Director (Sarah Aboott)		The report needs to be rebuilt to reflect your selections <u>Bebuild report</u>	

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.

Admin Reports
Reporting $ ightarrow$ Admin Reports
Filters:
User Filters:
Add Remove
Test Result Filters:
Add Remove
Save Filters
User Result Detail

Figure 114: User result detail report

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

Admin Reports
Reporting -> Admin Reports
Filters: User Result Detail
User Filters:
Xdd Remove
Test Result Filters:
Add Remove
Save Filters
User Result Detail

Figure 115: User result detail report

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

Admin Reports	
Reporting $ ightarrow$ Admin Reports	
Filters: User Result Detail Solution: G Filters applied to this report	
User Filters: No filter was applied.	Test Result Filters: No filter was applied.
Select an assessment from the list to see the report: Select an assessment	no me oppieu

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.

Admin Repo	orts						
$Reporting \to Admin$	Reports						
Filters: User	Result Detail 🛛 🛛 🛛 🛛 🛛 🛛 🛛 🖓						
User Filters: No filter was applie	ed.						Test Result Filters: No filter was applied.
Select an assessmen	nt from the list to see th er Details		k	Export		on the buttons It detail.	
Login ID	First Name	Last Name	Date Completed	Total Durat	tion	Overall Result	
Average (3 users)	:			00:00:0	8		
Blue10	Alex	Evans	28-May-2013 10:47	00:00:00	3		
Blue46	Rosemary	Wright	28-May-2013 10:49	00:00:08	3		
Blue47	Willie	Xander	28-May-2013 10:49	00:00:09)		

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.

Admin Rep	Admin Reports												f Options 🛱 Refresh
s: User	: User Result Detail												
rs applied	rs applied to this report												
Filters: In was applied	Iters: Text Besult= Filters: No filter use applied;												
in assessme	n assessment from the list to see the report: Phone Manufacturers												
(Hide All Use	Hide All User Detals Assessment Content Question Export												
gin ID	First Name	Last Name	Date Completed	Total Duration	Overall Result	New Content	Content Duration	Question 1	Question Duration	Question 2	Question Duration	Question 3	Question Duration
ion out of:							1		1		1		
ige (2 us	ers):			00:00:13	33.33%	33.33%	00:00:11	100.00%	00:00:02	0.00%	00:00:03	0.00%	00:00:06
	Samuel	Chapman	02-Apr-2013 14:49	00:00:17	33.33%	33.33%	00:00:15	100.00%	00:00:02	0.00%	00:00:03	0.00%	00:00:09
	Jimmy	Cooper	02-Apr-2013 14:49	00:00:09	33.33%	33.33%	00:00:08	100.00%	00:00:02	0.00%	00:00:02	0.00%	00:00:02

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.

Filters: User Result Detail	
User Filters:	Edit Test Result Filter:
	Select a filter type from the list and click Add Filter: Date: Add Filter Add Filter
	28/04/2013 III To 28/05/2013 III Delete
	Save
Add	
Test Result Filters:	
<empty criteria=""></empty>	
Add Remove	
Save Filters	
User Result Detail	

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.

Filters: User Result Detail	
User Filters:	Edit User Filter:
<empty criteria=""></empty>	Select a filter type from the list and click Add Filter: User Field Add Filter Login ID = Delete Save Cancel
Add	
Test Result Filters:	
<empty criteria=""></empty>	
Save Filters	
User Result Detail	

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.

Edit User Filter:
Select a filter type from the list and click Add Filter: User Field 🗸 🗛 Add Filter
Department V = IT × Delete
Save

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.

Filters: User Result Detail	8
User Filters:	
Department is 'IT'	
Add Remove	

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.

Test Result Filters:
Add Remove
Save Filters Load Filters
User Result Detail

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.

		i click Add Filter [:] Te	st Result	Add Filter
4/28/2013 Save Cancel	⊤]	0 5/28/2013		Delete
	Select a filter type fr	4/28/2013 III T	Select a filter type from the list and click Add Filter [®] Te 4/28/2013 To 5/28/2013	Select a filter type from the list and click Add Filter [:] Test Result

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.

Edit Test Result Filter: Select a filter type from the list and click Add Filter: Test Result 💌 Add Filter	
Cross skill training \square Results Between 0 \clubsuit AND 100 \clubsuit Delete	
Filter Search	
العامة المعاملة المعام المعام المعاملة المعاملة المعاملة المعاملة المعام المعاملة المعاملة المعام المعاملة المعاملة المعام المعام المعاملة ا	-
ECH Feedback	
February Agent Feedback	
Feedback Assessment 1	Ш
Feedback Assessment 2	
Financial Core Skills	
Learning Styles	
📲 📶 Marketing Core Skills	
🖆 💼 Mobile Phones	-

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.

Edit Test Result Filter: Select a filter type from the list and click Add Filter [:] Test Result 💌 Add Filter
ECH Feedback Results Between $0 \rightarrow AND 100 \rightarrow Delete$
Save

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.

Test Result Filters:
Assessment 'ECH Feedback' result between 0 and 100
Add Remove
Save Filters

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.

User Filters:	Edit Test Result Filter:
Belongs to group 'Trainers'	Select a filter type from the list and click Add Filter Date: Add Filter ECH Feedback Results Between 0 AND 100 Delete Save Cancel
est Result Filters:	Enter filter name
Assessment /ECH Feedback' result between 0 and 100	Please enter a name to save the filters as:

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.

Filters:		
User Filters: Belongs to group 'Trainers'		lFilter
Add	ECH Feedback Results Between AND AD Pelete	
Test Result Filters: Assessment 'ECH Feedback' result between 0 and 100		sult Filters: r was applied. Delete
Add Remove Save Filters User Result Detail Create report		-

Figure 132: Loading saved filters

The filter then appears in the relevant filter box.

Filters:
User Filters:
Belongs to group 'Trainers'
Add Remove Test Result Filters: Assessment 'ECH Feedback' result between 0 and 100
Assessment ECH Feedback result between 0 and 100
Add Remove Save Filters
User Result Detail

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.

Filters: User I	Result Detail 🛛 🛛					
Filters applied to	this report					
User Filters: Belongs to group 'Tr	ainers'					Fest Result Filters: Assessment 'ECH Feedback' result between 0 and 100
Select an assessmen	t from the list to see th	e report: ECH Feedbad	ck 💌			
Show/Hide All Use	r Details Assessm	ent Content (Question Duration	Export		
Login ID	First Name	Last Name	Date Completed	Total Duration	Overall Result	
Average (2 users):			00:00:08		
Blue46	Rosemary	Wright	28-May-2013 10:49	00:00:08		
Blue47	Willie	Xander	28-May-2013 10:49	00:00:09		

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.

Filters:
User Filters:
Add Remove
Test Result Filters:
Add
Save Filters
User Feedback Response Percentages 💌 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.

Reporting \rightarrow Admin	Reports																			
Filters: Use	Feedback R	esponse Pe	rcentages																	
Filters applied t	this report																			
User Filters: No filter was app	ed.									Test Resu No filter v	dt Filters: was applied.									
elect an assessm	nt from the li	st to see the	report: Feed	lback Asses	sment 2 💌															
			t on: All fee	dback	sment 2 💌															
Select the type of f			t on: All fee All fee From S	dback dback elf Only																
Select the type of f			t on: All fee All fee From S From N From D From P	dback dback elf Only Aanager On Direct Repor Veers Only	I Y				New	Content										
Select an assessm Select the type of f Export New 0 Feedback Question			t on: All fee From S From N From D	dback dback elf Only Aanager On Direct Repor Veers Only	I Y	6	7	8	New (Content 10	11	12	13	14	15	16	17	18	19	20

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).

Filters:	Question Response Summary				
User Filters: No filter was		Test Result Filters: No filter was applied.			
Select an ass	essment from the list to see the report. [redback Assessment 2 r (Cr1 FeeDback Teedback Assessment 2 New Co	ntent			
New Feedb	pack Question				
0	0		0.0%	1	
1	1		0.0%		
2	2		0.0%		
3	3	1	50.0%	1	
4	4		0.0%]	

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:

Б	dit User Filter:
S	Select a filter type from the list and click Add Filter [:] Hierarchy 💌 Add Filter
	Select a position 🛄 down 🧃 🖕 levels Delete
ſ	Top level position (NEW User)
Į	Director (Sarah Abbott)
	Manager (Danielle Armstrong)
	Manager (Bill Barker)
	Manager (Samuel Chapman)
	• New Position (empty)
	~

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.

Filters: User	Result Detail 🛛									
Filters applied to	this report									
User Filters: No filter was applie	ed.					Test Result Filters: No filter was applied.				
Select an assessmer	nt from the list to see th	e report: Feedback As	ssessment 2 💌							
Show/Hide All Use	r Details Assessm	ent Content	Question Duration	Export						
Login ID	First Name	Last Name	Date Completed	Total Duration	Overall Result	New Content	Content Duration	New Feedback Question	Comments	Question Duration
Question out of:								20		
Average (2 users):			00:00:07		N/A	00:00:07	10		00:00:07
Blue03	Bill	Barker	28-May-2013 10:27	00:00:12		N/A	00:00:11	17		00:00:11
Blue10	Alex	Evans	28-May-2013 10:47	00:00:03		N/A	00:00:03	3		00:00:03

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.

Feedback Deployment Models
Administration $ ightarrow$ System Data $ ightarrow$ Feedback Deployment Models
* Self only : Self * Self and Manager : Self, Manager
You are not able to edit or delete either the feedback deployment models that are created by default, or those that have been allocated to assessments.
An asterisk (*) before the name of a feedback deployment model indicates that it is one of the default internal models. These cannot be removed or edited.

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.

📄 Feedback Deployment Model		×
Name		Â
	Self	
	Manager	
	< Report	
	Peer	E
Save Cancel		-

Figure 142: Creating feedback models

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

Feedback Dep	loyment Model	×
Name		Â
Self	Ma	nager
	R	eport
		Peer
		=
Save Cance		
		-

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 0K.

Feedback Deployment Model	×
Name	-
Feedback	
How many Reports do you want to add to this Feedback Deployment Model? (Enter a value from 1- 100).	E
OK Cancel	
	-

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.

Manage Reports					
$Reporting \rightarrow Manage Reports$					
+ Add New Report					🧐 Refresh
Name	Connection Types	Admin Report	Archived	Last Updated	
No records to display.					
H 4 1 F FI Po	ge size: 15 💌				O items in 1 pages

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.

Please enter the path to the file or click Brow	se to search for i	t
U:\Reference Guides\Skills R Browse		

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	3	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	G	iold
jhiggins	Joanne	Higgins	jhiggins		1	2	3
jparker	Jerry	Parker	jparker	2	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. 	2	3	3

Figure	150:	Setting	employee	skills
--------	------	---------	----------	--------

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

Sheet1	Sheet2 Sheet3								_		
User Name	Employee ID	First Name	Last Name	billing	Iphone	Landine	Sales	Service	Support		
aosborn	aosborn	Ann	Osborn	1	3	2	2	3	2		
Jay	U_8306_Simulator	Amy	Jay	3	4	2	5	1	3		
Feust	U_7004_Simulator	Andrew	Faust	1	3	1	5	2	3		
Larson	U_8224_Simulator	Ann	Larson	1	3	4	5	2	3		
Neat	U_8232_Simulator	Bandi	Neal		4	.3	5	3	3		

Figure 151: Confirming accuracy of input data

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

Clear all Mappings		
Source Fields	User Field Mapping	
UserName	Source Field	Destination Field
EmployeeID	UserName	UserName
FirstName		First Name
LastName		Last Name
fullog		EmployeeID
lphone		Email Address
Landline		Tenant
Sales		Agent Login
Service		Persons Folder
Support		Access Group
ISDN30		Agent Group
	Skill Mappings	
		Set Description

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.

There details	are case-centitive		
Enter Your			
Select Tenant	Silver Lining Solutions		
Login ID Password			
Continue			

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.

à	A	В	C	0	E	F	G	н	1	1	К	L	M	N
Fir	rstname.	Sumame	Employee number	Manager	Position	Region	Location	Team	Company	Date	Product Knowledge (Assessment)	Agent Attitude	Customer Info Fit	Identify Problem& Sol
Tia	inni	Ayala	tayala	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	6		
Lis	a	Barnes	Ibarnes	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	3		·
LOI	nnie	Bruce	Ibruce	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	4	10	
sh	ane	Carlson	scarlson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	6		
Bri	lan	Chen	bchen	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7		1	
Jol	hn	Cunningham	jcisco	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	10		1
LO	uise	Cunningham	lcunningham	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	1	10	i i
Lui	is	Davenport	Idavenport	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	10	1	
Lil	lian	Davies	Idavies	ataibot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	3	3	
He	enry	Dunn	hdunn	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	7	4	
Lo	rraine	Ellison	lellison	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	1	3	
An	drew	Faust	afaust	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	2		
Lar	rry	Finn	Ifinn	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	10	
Ma	ary	Gail	mgail	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	2		
Ed	luardo	Garcia	egarcia	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	5	. 4	(j)
Sta	an	Goldman	sgoldman	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1		
LI	lie	Grant	Igrant	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	5	5	(
Ka	thy	Gurin	kgurin	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	8	5	14
Los	retta	Hammond	Ihammind	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	10		
Lo	uise	Jacobs	ljacobs	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	. 7		
Ап	nγ	Jay	ajay	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1	4	
lar	n	Johnson	ijohnson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	1	
Gu	irutej	Kaur	gkaur	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	3	6		
An	n	Larson	alarson	atalbot	Agent	Manchester	Deansgate	Team 1	My Company	01/11/2011	9	4		
Ka	d.	Lemieux	klemieux	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	4	3	5	
Kir	m	Lewis	klewis	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	6	6	4	
Be	:n	Lin	blin	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	1	3		
Pe	le	Lolani	plolani	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	2	10	1	r) .
Re	becca	Lorraine	rforraine	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	9	9	8	1
Lis		Low	llow	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	3	7	1	r .
Le		Lyn	tiyn	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011		4		Ê.
4.1	H She	et1 Sheet2	Sheet3 . Ca											

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.

Imports Mapp	ping Templates		
			S Refresh
Created by	Created Date	Status	
No records to display.			
Import New Data			

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**.

nport KPI Data				
Live imports	Archived imp			
		G Refresh		-
Created by	Created Date 25/05/2012 10:0	Optimizer	-	
demo demo		Upload File	Please browse to the file you wish to upload.	
demo demo	28/05/2012 09:4	Identify key data	C:\Users\Hayley\Desktop\HF _Browse	Browse and select the
demo demo		Set up data mappings	•	
demo demo	06/06/2012 12:1	Perform import		required spread sheet.
Import New Data				
			(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.

Import KPI Data				
Live imports	Archived imp			
		9 Retre	a	
Createst by	Created Date	Optimizer		8
demo deino	25/05/2012 10 0	Upload File	Please splect the sheet you wish to import from.	
dema demo	28/05/2012.09.4	Identify key data	Sheet1	
demo demo	06/06/2012 11 4	Set up data mappings		
demo demo	06/06/2012 12 1	Perform import	Please select the field which uniquely identifies the user as well as mapping it to the correct user field. Please Select Which maps to Please Select	
Import New Dat			Vierse Select	
	-		Please select which field contains the date of the record.	
			Please Select	
			Please select the type of data you wish to import.	
			KPs -	
			Previous, Next	
			HARMON MANY	
a (

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.

Live imports	Archived imp	orts Mapping Templates			
	Oreaned Date	🚨 Optimizer			
demo demo	25/05/2012 10 0 28/05/2012 09 0	Upload File Identify key data	Please select to load a previous mappi	ng templates. Please Select 💌	
deno deno	06/06/2012 11 4	Set up data mappings	Please select a source field		
Import New Tel	2	Perform import	Product Rooviedge (Absessment) • Prease Series Forstname Surrame Employee number Manager Postcon Location Team Company Dise Product Rooviedge (Absessment) Agent Attinué Customer traft Ro	Destination Held Destination Held Product Knowledge	Add mapping Semove this mapping
			Identify Problem&Soin Customer understanding Product Offering (Assessment) PCR 8band Revenue Retention	Previous Next	

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.

Import KPI Data						
Live imports	Archived imp	orts Mapping Templates				
		G Refresh				
Created by	Created Date	Optimizer				
demo demo	25/05/2012 10:0	Upload File	Please select to load a previous mapping to	Provide and	Any saved tem	plates will
demo demo	28/05/2012 09:4	Identify key data	Please select to load a previous mapping to	emplates: Please select	be saved to sel	ant for
demo demo	06/06/2012 11:4	Set up data mappings	Please select a source field		be saved to ser	ection
demo demo	06/06/2012 12:1	Perform import		ch maps to Product Knowledge	future imports.	
Import New Data		Perform import			interio importo.	
Import New Oata			Field Mappings			
			Source Field	Destination Field		
			Product Knowledge (Assessment)	Product Knowledge	Remove this mapping	
			Clear all Mappings Save Mapping			
				Previou Next		
				\sim		

Figure 165: Saving an import template

Click on Start Import to import the data.

port PI Data Live imports Archived imports Mapping Templates					
Created by Created Date	S Optimizer				
demo demo 25/05/2012 10:0	Upload File	You are now ready to run the import, please click select an option:			
demo demo 28/05/2012 09:4	Identify key data	Tou are now ready to that the import, prease click select an option.			
demo demo 06/06/2012 11:4	Set up data mappings	Click on Start Import			
demo demo 06/06/2012 12:3	Perform import	Click on Start Import			
import New Data		775			

Figure 166: Starting data import

Once the import has been completed click on Finish.

Live imports	Archived impo	ets Mapping Templates		
		Stere		
	Greated Date	🚨 Optimizer		
imo demo	25/05/2012 10 0	Upload File	The import has finished. Click Finish to clase the window.	
mo dema	28/05/2012 09 4	Identify key data		
mo dema	06/06/2012 11 4	Set up data mappings		
emo demo	06/06/2012 12 1	Perform import	The import completed successfully.	
port New Deta	1			
			(mat)	

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.

DNA Blocks	
$Administration \ {\rm \rightarrow} \ System \ Data \ {\rm \rightarrow} \ DNA \ {\rm \rightarrow} \ DNA \ Blocks$	
Step 1 -> Build/Edit DNA Step 2 -> Assign Users to DNA St Assessments DNA KPIs Date From 5/28/2012 Im Date To 5/28/2013 Imiliar	tep 3 -> Refresh DNA Cube Previous DNAs
Description	Please Select Save
Feedback	
Quality	Clear
Revenue	\sim
Transactions	
Transfers DNA components with associated data. Drag and drop block	Please drag and drop an assessment, performance data or a DNA block

Figure 169: Creating DNA blocks

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

DNA Blocks	
$Administration \rightarrow SystemData \rightarrow DNA \rightarrow DNABlocks$	
Step 1 -> Build/Edit DNA Step 2 -> Assign Users to DNA Ste	ep 3 -> Refresh DNA Cube
Assessments DNA KPIs	
Date From 5/28/2012 Date To 5/28/2013	Previous DNAs
Description	Please Select Save
Feedback	
Quality	Clear
Revenue	
Transactions	
Transfers	Quality (\$ 25%) The weighting can be changed for the component by moving the box or using the arrows. Transfers (\$ 25% \$)

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.

Save DNA block			

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.

DNA Blocks		
Administration $ ightarrow$ System Data $ ightarrow$ DNA $ ightarrow$ DNA Blocks		
Step 1 -> Build/Edit DNA Step 2 -> Assign Users to DNA Step 3 -> Assessments DNA KPIs	Refresh DNA Cube	
Date From 5/28/2012 III Date To 5/28/2013 III		
Description		Save Changes Rename Cancel View Full DNA
Feedback	a	
Quality	Transfers (🖡 13%)	Clear
Revenue		
Transactions		
Transfers		
	[温]	
	Revenue (🌡 12% 🕯)	
	1	
	Quality (4 25%)	
	Quanty (+ 25% =)	
	limini mimimi mimini mimi	
	2	
	Transactions (425%)	
	mansactions (+ 23/8 =)	

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.

Save DNA block				
DNA Name is Job role:				
Save				

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.

	Data → DNA → DNA Blocks			_	
Step 1 -> Build/Edit (ONA Step 2 -> Assign	Users to DNA Step 3 ->	 Refresh DNA Cub 	e	
lease select a job role	and then drag and drop users	from the un-assigned list to the	Assigned users list.		
Users				Job roles:	
Search for user:				Job role	
	Only Unassigned Us	ers		all KPIs	
lob roles:	All				
ob Title :	All]			
Department :	All				
Site :	All 💌				
	Go (Users Found:51)				
First Name	Surname	Current Job role			
Sarah	Abbott	all KPIs	<u>^</u>		
Danielle	Armstrong	all KPIs			
Boris	Badmin	all KPIs			
Bill	Barker	all KPIs	=		
Ted	Bond	all KPIs			
· · · ·	Chapman	all KPIs			
Samuel	Cooper	all KPIs			
	cooper				
Jimmy	Dawson	all KPIs			
Samuel Jimmy Stanley Maureen		all KPIs all KPIs			
Jimmy Stanley	Dawson				

Figure 174: Assigning individuals to job roles

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

Manage DNA Blocks		
Step 1 -> Build/Edit D	NA Step 2 -> Assign Agent: NA then click Run Cube Translatio	
if you have built a new bi	IA then click kun cube Translatio	n.
Run Cube Translation		
If you have just assigned	in agent to a new DNA or moved	them from a DNA then just click RUN THE CUBE.
RUN THE CUBE		
		Click on Run The Cube
		Click off Run The 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.

Calculate By: Current 💌 Refresh			Total No of employees gree Total No of employees amb Total No of employees red.
			Total No of employees:
My Company	Liverpool	Manchester	
Manchester	Oreen Anber S200%	Green	
	29.17%	Aniber 37 Sons	
	Red 18,75%	Red 14.50%	

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.

A -> View Filtered DNA		
Calculate By: Current 💌 Refresh		Total No of employees green: Total No of employees amber: Total No of employees red.
		Total No of employees.
Admin Manager Admin Admin Admin Admin Admin Server Amber Samber Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Admin Ad	Compare Hide DNA Show DNA Map Assign Learning Items	
	Anima (198) Log Log </td <td></td>	

Figure 179: Viewing individual DNA results

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

View Filtered DNA		
$DNA \rightarrow ViewFilteredDNA$		
Calculate By: Current		Total No of employees green: 0 Total No of employees amber:1 Total No of employees red: 0
		Total No of employees: 1
🖃 - Admin Manager		
Admin	User: Bill Barker Alerts	
UK	Job role	
all KPIs	Field Value	
Green		
Amber	First Name Bill	
Samuel Chapman	Last Name Barker	
	Job Title Finance Manager	
Director		
itaria Board ⊐ Finance Manager	Hide Compare Hide DNA Show DNA Map Assign Learning Items	
- Finance		
	Please Select	
all KPIs		
Green	Transfers (93)	
Amber	Revenue (430927)	
Bill Barker	85	
	Quality (1)	
🗐 🗉 Sales Manager		
Support Manager	Transactions (592)	
🖈 - Telesəles	Transactions (592) E Feedback (28)	
	all KPIs	

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.

Employees		User Name	Score
se select a Job Role	all KPIs	😥 Alex Evans	64
tion Criteria	OUser list@filters:	📝 Sarah Abbott	63
itle :	All	Danielle Armstrong	60
rtment :	Al	I Samuel Chapman	60
	Alt	2 Bruce Edwards	54
		V Ted Bond	52
range (percent):	(0-100)	🕅 Jean Ferguson	52
ch across all roles:	(6-10)	V Stanley Davison	50
ulate By:	Current	Select All Deselect all	40
18. i-	Refresh Sectors SIG Could for Could for Could for Could for	Exact[inveluer_felection	
	eedback (483)		

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.

lease select a Job Role	ali KPis 📼		
	800 NF 12	😢 Alex Ev	ans 64
election Criteria	OUser list# Filters:	😰 Sarah A	lbbott 63
ob Title :	All	🕅 Daniell	le Armstrong 60
epartment :	All	2 Samuel	I Chapman 60
ite :	All	Ruce 6	dwards 54
		2 Ted Bor	nd 52
how range (percent):	0	🕅 Jean Fe	erguson 52
earch across all roles:	(90 - 100) Between 90% - 100% results.	Z Stanley	Dawson 50
alculate By:	Current	Select All Desele	ect all
	Refresh		
		Export Save User	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.

Employee Compare	
User Search:	
	Search
Search results:	V

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.

th Navigation 💌 •	Trend Graph	
User	$DNA \rightarrow Trend Graph$	
Administration	Date Range Select DNA Component	
Users	Start Date 1/17/2012	
Roles & Widgets	Select Users Parts	
Users & Hierarchy Groups	Uper Selection Please Select 📰 🖺 📑	
Import Users	▼ IV Wilsilverlining	
Assessments	▶ Accounts	
Manage Assessments	T Development	
Reset Tests	Paul Fieming	
Certificates	Margret Stewart	
Knowledge Nudges	▶ Management	
Feedback Deployment Models	▼ 🗹 Sales	
KPIs	🖾 Garth Brooks	
Manage KPI Data	Vartin Bugs	x
Import Templates	K Helen Hill	•
DNA	₩ Steven McGrath	
Blocks	₩ Laura Peace	
Components	₽ David Time	
UserSelections	▶	
Learning Items		
User Field Mappings		
Job Role Mapping		
Update Routing Skills		
DNA Cube		
leporting		
View Reports		
Manage Reports		

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.

Date Range		
Start Date 9/17/2011	Ê	End Date 9/17/2013
Select Users		
User Selection	Sales staff	e et ø
👻 🗹 Wii Silverlining		
▼ ☐ Accounts		
🗌 Eddie Kemp		
Simon Simple		
Development		
Management		
Sales		
Tech Support		

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 **0**K 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.

👗 Edit DNA -> CME I	Mappings	
Direct Mapping:		
DNA Lower bound:	0	
DNA Lower upper:	0 2 1	
CME Skill Value:		
	Add	
Lower Boundary	Upper Boundary	CME Value
0	2	1
Close		

Figure 192: Setting skill link properties

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

INA's	~	Linked Skills		Update	CME Skills Refresh Skills
NA Name		DNA Name	Skill		Skill
leverue		Revenue	Broadband		Broasband
esolution		10000000			Customer_Service
etention					Email
buelity	100				English
ales Agent					SA_Broadband
etention compare					SA_Customer_Service
est block					SA_Email
lack Office Representative					SA_English
leverne: Skill					

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

Allti Analysis			
User Selection Choose Items to Analyze Perform Analysis Analysis	Result Saved Items Summary		
Tick one or more items in the time on the left are citik Add to add them to to the list of ite	ms to analyse. Ticking/unticking a box will affect all visible items that belo	ong to it in the tree	
To de la contra senti hime Lacardo da la del deen to lo tre set d'ite Contra de la deen t	m to anayor. Tocing uncoving a box will affect an visible term that bed	ng to a in the tree	

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.

Skills Analysis User Selection Choose	Items to Analyze Perform Analysis Analysis Result Saved Items Summary
Best Correlations Fin	the most highly correlated results. You can use the "Find correlation for" tab to help you find potent d Correlation For Results Matrix best correlations for just the selected set
Correlation %	Data Set 1
90.06	Customer Retention
89.00	Customer Understanding
87.25	Customer Understanding
87.18	Customer Retention
86.87	Customer Retention

Figure 198: Analysis results

The Find Correlation For \cdot 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.

Uter Selection \ Choose Items to Ansive \ Perform Analysis Availute	Result Saved Remu Summary	
e Best Correlations fat shows the must highly correlated results. You can use the "Find a	constitution for" (ab to help you find potential training areas to improve any of your date pources. T	The Results Metrix shows the complete results of the any
Sect Correlations Find Correlation For Assults Matrix		
thich analysis set du you want to find the best contriations for? Broadband Revenue	•	
Analyzed Deta	Constantion N	Matches
Customer Retention	79.625	96
fot	28.47%	96
Customer Understanding	76.75%	94
Product Offering (Assessment)	76.37%	94
Identify Problem & Solution	49.37%	14
Customer lefs & Fit	57.35%	96
Prutut Kossinge	43.62%	96.1
Agent Attitude	1455	N

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.

User Selection Choose It	errs to Analyze 🔨	Perform Analysis	Analysis Result	Seved Items 5	lummary				
e Best Correlations list shows th	e most highly correlat	ed results. You can	use the "Find correlatio	n for" tab to help	you find potential trail	ning areas to improv	e any of your data so	irces. The Results &	fatrix shows the comp
Best Correlations Find C	Results Matrix								
	Agent Attitude	Broedband Revenue	Customer Info & Fit	Customer Retention	Cuitomer Understanding	ю	identify Problem & Solution	Freduct Knowledge	Product Offering (Assessment)
lgent Attitude		0.45%	2.14%	10.61%	5.87N	12.27%	11.49%	4.57%	5.80%
inadiand Revenue	0.45%		57.33N	79.61%	78.75%	78.47%	69.55%	0.52%	78.55%
Customer Info & Fit	2.14%	\$7.35%		62.85%	63.57%	65.57%	60.78%	3.68%	57.67%
Customer Retention	10.51%	79.415	62.88N		90.06N	86.87N	75.87%	0.35%	87.055

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.

🧮 Save training plan	×
Retention	ġ.
Save as a new training plan [®] Replace existing training plan	1
Save	

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.