

Genesys Skills Assessor 8.1

Administrator Guide

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

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

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Preface

Welcome to the *Genesys Skills Assessor 8.1.1 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 8.1.125 releases of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at <u>orderman@genesyslab.com</u>

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 6.

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 centre. 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, Learning Management System courses and so on.

Centralizing agent skills information allows contact centers to build a skills DNA profile 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 centre?
- Who has what skill and skill levels?
- Who requires what type of training and when.

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

Intended Audience

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

Making Comments on This Document

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

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

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

Contacting Genesys Technical Support

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

Related Documentation Resources

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

• The *Framework 8.0 Configuration Manager Help*, which will help when using Configuration Manager.

• The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at http://genesyslab.com/support.

Genesys product documentation is available on the:

Genesys Technical Support website at http://genesyslab.com/support.

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:

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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

Screen Captures Used in This Document

Screen captures from the Configuration Manager graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the GUI; the error would not be corrected in any accompanying text. Preface



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 be presented with a screen similar to the one below (the format of the actual screen will depend on whether this has been customized).

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

Senesys		Genesys Skills Assessor
Welcome Welcome To login, enter y	your User Name and Password below	
	These details are case-sensitive	
	Continue Con	
	Trouble logging in? This waters as a Casin to reventer your login status. If your browser is unable to assign Casina, you will not be able to login This waters associated to check that your browser is able to associate Casina, or try clearing your Casina cable.	

The administration screen will be presented after logging in, similar to the example below. The tabs available will depend on what has been defined in the user role template and this will be explained in more detail later in the document. In the example below this user has been configured to Manage Assessments and also take assessments as a User and therefore has those two tabs available. The Tabs at the top of the home page are customizable and additional ones can be created.

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

ello, Gerry Cafolla				Logout
My Development Reports Manage Groups & Users System S	ettings Manage Assessments)		Add stuff.
ly Development		¥ (Options 🛸 Refresh 💽	🔪 a My Development 🛛 🗸 🗸
Assessments (by Group) Assessments (by Date) Feedback on othe	r users (3)			view your progress through the
Sroup Name	Date By	% Complete	% Average	as essments that have been assigned to you, and take any that are outstanding
New Starters Q4 2009		41.18	0.00	you, and take any that are outstanting
nsurance Knowledge		41.18		× Remove
Consumer Sales		36.52	0.00	
Mortgage Selling			0.00	
Pre-Sales Team		30.39	0.00	
Health Care New Starters		18.75	0.00	Expand or reduce th
Skills Mauritius		0.00	0.00	Expand of feduce in
Senesys New Group		50.00	25.00	window to view the
NHS		50.00 58.92	0.00 27.80	window to view the
rest Group ndividually assigned assessments		58.92	0.00	available
namadany assigned assessments		30.00	0.00	available

The right hand side window is expandable to show the functionality (or widget/s) associated to the tab. In the above example the tab open is My Development which has the My Development widget associated with it.

The application has been developed to allow the user the flexibility to individually customize their home page.

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 'Manage Hierarchy' option to create and manage the hierarchy. The hierarchy structure automatically gives visibility of any subordinate assessment results in the 'Report' widget.

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



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



The position will then appear in the hierarchy.

Genesys [®]			Genesys Ski	ills Asses
lo, Gerry Cafolla				Lo
ly Development Reports Manage Groups & Users System Settin	igs 🛛 Manage Assessments 🛛 💿			Add
age Users & Hierarchy			🖌 Opt	tions 🛸 Refres
CEO	Users in position New po			~
Bob Andrews	Login ID	First Name	Last Name	
Contact Centre Training Manager	No records to display.			
Peter Ardon				
New position				
Contact Centre Team Leader - Green Team Frankie Davies				~
	Search for user:	Go		<u>^</u>
 Green Team Agent Helen Jackson 	1 2 3 Page1 of 3	3, items 1 to 10 of 27.		
Contact Centre Team Leader - Blue Team	Login ID	First Name	Last Name	
Thomas Anderson (+2 others)	Tanderson	Thomas	Anderson	=
Director of Customer Communications / Experience	bandrews	Bob	Andrews	
Carly Maplin	pardon	Peter	Ardon	
Administrator	bbaxter	Bob	Baxter	
Hayley Binns	Hayley	Hayley	Binns	
Unassigned users	dbraun	Dirk	Braun	
Dirk Braun (+ 8 others)	✓ demo	Gerny	Cafolla	~

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



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

Genesys			1	Skills Asses
illo, Gerry Cafolla				Log
My Development Reports Manage Groups & Users System Settir	ngs 🔰 Manage Assessments 🛛 🙆			Add :
mage Users & Hierarchy				Options 🗯 Refresh
CEO	Users in position			<u> </u>
Bob Andrews	Login ID	First Name	Last Name	
Contact Centre Training Manager	No records to disp	olay.		
Peter Ardon				
New position				
empty				
Contact Centre Team Leader - Green Team	≡			~
Frankie Davies	Tanderson	Thomas	Anderson	^
Green Team Agent	bandrews	Bob	Andrews	=
Bob Baxter	pardon	Peter	Ardon	
🔳 Green Team Agent	bbaxter	Bob	Baxter	
In the Burthaux of the the st	Hayley	Hayley	Binns	
Jackie Button (+ 1 other)		D. 1	Braun	
🗷 Green Team Agent	dbraun	Dirk		
Green Team Agent Helen Jackson	Dutter .		Button	=
 Green Team Agent Helen Jackson Contact Centre Team Leader - Blue Team 	dem Add to	o position	Button Cafolla	1
Green Team Agent Helen Jackson	dem Add to			8

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

Any new users can be created manually and then assigned to the relevant position(s) in the hierarchy. If there are any structure changes these can be amended in the hierarchy and then the users assigned to the positions.

If any new positions need to be created and slotted into an existing structure, this can be amended by creating the position and then clicking on the existing position and dragging it on top of the new position. The hierarchy will automatically be amended to include this new position.

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.

Genesys				Skills Asses
llo, Gerry Cafolla				Log
1y Development Reports Manage Groups & Users System Settin	ngs 🛛 Manage Assessments 🛛 📀			Add
nage Users & Hierarchy			1	Öptions 🛸 Refresh
Contact Centre Team Leader - Green Team	Users in position New	v position		<u>^</u>
Frankie Davies	Login ID	First Name	Last Name	
 Green Team Agent Bob Baxter 	No records to display			
 Green Team Agent Jackie Button (+ 1 other) 				
Image: Green Team Agent Helen Jackson		Thomas		
Helen Jackson	Tanderson	Thomas	Anderson	~
Helen Jackson	bandrews	Bob	Andrews	
Helen Jackson Contact Centre Team Leader - Blue Team	bandrews pardon	Bob Peter	Andrews Ardon	
Helen Jackson Contact Centre Team Leader - Blue Team Thomas Anderson (+2 others)	bandrews pardon bbaxter	Bob Peter Bob	Andrews Ardon Baxter	
Helen Jackson Contact Centre Team Leader - Blue Team Thomas Anderson (+ 2 others) Director of Customer Communications / Experience	E bandrews pardon bbaxter Hayley	Bob Peter Bob Hayley	Andrews Ardon Baxter Binns	
Helen Jackson Contact Centre Team Leader - Blue Team Thomas Anderson (+ 2 others) Director of Customer Communications / Experience Carly Maplin	bandrews pardon bbaxter Hayley dbraun	Bob Peter Bob Hayley Dirk	Andrews Ardon Baxter Binns Braun	
Helen Jackson Contact Centre Team Leader - Blue Team Thomas Anderson (+2 others) Director of Customer Communications / Experience Carly Maplin Admin Hayles Rename	bandrews pardon bbaxter Hayley dbraun jbutton	Bob Peter Bob Hayley Dirk Jackie	Andrews Ardon Baxter Binns Braun Button	
Helen Jackson Contact Centre Team Leader - Blue Team Thomas Anderson (+2 others) Carly Maplin Admi Hayles Rename	bandrews pardon bbaxter Hayley dbraun	Bob Peter Bob Hayley Dirk	Andrews Ardon Baxter Binns Braun	

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



If creating a new user to associate to a position then the example below will be presented. There will no unassigned users listed as these will only be presented when creating a new user through the unassigned user position in the hierarchy. Click on 'Create New User'.

ello, Gerry Cafolla			Logo
My Development Reports	Manage Groups & Users System Settings Manage As:	essments 💿	Add st
nage Users & Hierarchy			🖌 Options 🛸 Refresh
Genesys Skills Assessor			_ 🗖 💌 📤
Dirk Braun Bernard Downes User 23 New Charlie Pugash Theresa Ricky Dee Ross John Smith Danny Wallace			2

Click on 'Create New User' and a message will be presented to confirm that a new user is being created.

Click on 'OK' to continue.

Senesys:		Genesys Skills Assessor
Hello, Gerry Cafolla My Development Reports Manage Groups & Users & Manage Users & Hierarchy	rstem Settings 🔷 Manage Assessments 🛛 💽	Logout Add stuff ≁ Options ⊠ Refresh 🥑
Create New User Dirk Braun Bernard Downes User 29 New User 38 New Charlie Pugash Theres Ricky Dee Ross John Smith Danny Wallace wascript:dopostBack('newUser','')	The page at http://localhost/ says: 🔀 Are you sure you want to create a new user here? OK Cancel	

A template will be presented as per the example below.

Enter the information as required and select 'Apply' to save the new user details.

Genesys		Genesys Skills Assess
<mark>ello, Gerry Cafolla</mark> My Development Reports Manage Groups & Users	System Settings Manage Assessments 🕼	Loge Add st
lanage Users & Hierarchy		🖋 Options 🛸 Refresh
🙇 Genesys Skills Assessor		_ 0 💌 🎦
Create New User Dirk Braun Bernard Downes User 29 New User 33 New User 33 New User 33 New User 38 New Charlie Pugash Theresa Richy Dee Ross John Smith Danny Wallace	Edit User Details Assign Assessments Login ID User 38 Last Name New First Name User 38 Function	

The newly created user will then be visible within the unassigned user list in the left hand side window available to be assigned to a position.

Hierarchy Import Functionality

Organizations can now import their organisational hierarchy directly into Skills Assessor using the 'Import Hierarchy' widget.

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*.



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

mport Hierarachy		🐔 Options 🛱 Refi
elected File:	Copy of People Listing Report - L and D 110411v2.xls	
Jser Hierarchy field Mappings		
lease select the columns from	you data source which hold the data for fields specified below:	
osition ID field:	Please select	
osition Description field:	Please select	
ine Manager field:	Please select	
Jser Password:	Please select	
	your data source which hold the data for the user fields in skills assess:	
Please select the columns from	Field to Map	
Please select the columns from	Field to Map Please select	
Please select the columns from	Field to Map	
Please select the columns from User Field Employee ID	Field to Map Please select	
Please select the columns from User Field Employee ID Last Name	Field to Map Please select Please select	
Please select the columns from User Field Employee ID Last Name First Name	Field to Map Please select Please select	
Please select the columns from User Field Employee ID Last Name First Name User name	Field to Map Please select Please select Please select	
Please select the columns from User Field Employee ID Last Name First Name User name Skill	Field to Map Please select Please select Please select Please select Please select	
Please select the columns from User Field Employee ID Last Name First Name User name Skill Site	Field to Map Please select	
Please select the columns from User Field Employee ID Last Name First Name User name Skill Site Line Manager 1	Field to Map Please select Please select	

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 within the 'Manage Users And Hierarchy' widget.

As part of the import process individuals will automatically be assigned to User Roles (see Manage 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 is accessible is specified and managed in the

'Manage Roles & widgets' widget.

In the example below the 'Manage Roles & Widgets' widget is available from the Manage Groups & Users tab. Expanding the functionality or Widget window allows visibility of what other functionality is available.

In this example there are 5 Roles and additional roles can be created if required.

Against each role is a visible count of the number of users and widgets associated to the role.

Senesys [.]		Ger	nesys Skills Assessor
Hello, Gerry Cafolla			Logout
My Development Reports Manage Groups & Users Sys	stem Settings 🔰 Manage Assessments 🛛 💿		Add stuff
Manage Roles & Widgets		🎤 Options 🛸 Refresh 횓 🎴 Manage Group	ns ^
List of roles: User Widget Count Count	Users Widgets Template Tabs Users in role:	Manage Roles	& Widgets 🗸 🗸
Administrator 3 16		and define which role	widgets are visible to each
Assessment Designer 0 1		role	
Manager 7 4		Click on the required	
Test 0 2			k Hierarchy 🔨 🔨
User 14 3	Search Hierarchy	Widget to view the	^
	Search for user: Go		
	Login ID First Name	functionality and	
	Tanderson Thomas		
	bandrews Bob	information.	
	pardon Peter bbaxter Bob	Baxter	J
	Hayley Hayley	Binns	
	dbraun Dirk	Braun	

Defining, Creating and Managing Roles

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

By selecting the 'User' role, any users associated will appear in the 'Users' window.

	Genesys [.]				Genesys Skills Assess
Anage Roles & Widgets User User Count Count Administrator 3 16 Assessment Designer 1 3 User 14 3 User Search Hierarchy Search For user: 1 2 3 Page 1 of 5 Bob Andrews Page 1 o	llo, Gerry Cafolla				Logr
List of roles: User Widget Count Template Tabs Administrator 3 16 Assessment Designer 0 1 Manager 7 4 Test 0 2 User Jane Doe Search Hierarchy Search First Name Last Name Search Hierarchy Search Search Jace Doe Vec Jane Doe V Manage Users & Hierarchy Search First Name Search Hierarchy Search First Name Search Page 1 of 5 Nomin Bob Andrews pardon Poter Ardon baxter Bob Baxter Hayley Binns Hierarchy	1y Development 💦 Report	.s Manage Groups & Users	System Settings Manage Assessments 0.		Add st
Count Count Count Widges Template rais Administrator 3 16 Assessment Designer 0 1 Manager 7 4 Test 0 2 User Jane Doe Vises Page 1 or 5 Manage Users & Hierarchy React Tests Bob Andrews Pardon Bob Bob Andrews Pardon Bob Bob Baster Hayley Binns	nage Roles & Widgets			🖌 Options 🤹 Refresh	🕗 🎽 Manage Groups
Test 0 2 User Jane Doe Image: User search for user. Search for user. Search litrarchy Search litrarchy Search for user. Image: User selection window Window Image: User selection window Bob Anderson Bob Baxter Hayley Hayley Bob Baxter Hayley Binns	Administrator Assessment Designer	Count Count Filter 3 16 0 1	Users in role User Login ID First Name bbaxter Bob demo Gerry	Last Name Baxter Cafolla	Manage the roles within your organisation, and define which widgets are visible to each role
User 14 3 User Search Hierarchy search for user: Go 1 2 3 Search For user: Go 1 2 3 Login ID Tandason Bob Bob Andrews Bob Bob Andrews Peter Ardon Bob Baxter Hayley Binns	Test	0 2			
User search for user: Go selection I 2 3 Page 1 of 3 Variation First Name Last Name Tandascon Bob Andrews pardon Peter Andrews pardon Bob Baxter Hayley Hayley Binns	User	14 3		•	
		selection	Login ID First Name Tandoson Thomas bandret Bob pardon Peter bbaxter Bob Hayley Hayley	Last Name E Anderson E Anderson E Andrews Ardon E Baxter Binns E E E E E E E E E E E E E E E E E E	
			¢	bandrews	Andrews
Add setested user(s) Andrews pardon Find user in hierarchy Andrews bbaxter Bob Baxter				bbaxter Bo	b Baxter
bandrews Add sensed user(s) Andrews pardon Find user in hierarchy Ardon				bbaxter Bo Hayley Ha	b Baxter yley Binns

Additional users can be assigned 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.

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'.



A list of possible individuals will then be presented to select from. There is also the option to search for a user in the hierarchy. Right click on the individual in the bottom window and select 'Find user in hierarchy'.

Search Hi	erarchy		
Search for user: do	e Go		~
Login ID	First Name	Last Name	
jdoe	lane	Doe	
Add se	lected user(s)	_	
Find us	er in hierarchy		
			\sim

Visibility is immediately given of where the user is situated in the hierarchy in the user selection window, as per the example below.



Widgets

There are 34 widgets 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.
- DNA 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 Hierarchy Import user details and organisation structure.
- Import KPI Data Import 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.
- Manage Assessments -this is where the assessments are created, edited, deleted and assigned.
- Manage Certificates create certificates to attach to assessments.
- Manage DNA Blocks Create and edit SkillsDNA blocks, representing Job Roles or components of those roles.
- Manage DNA Components Create and manage DNA Components.
- Manage Groups Groups are created in Skills Assessor for the purpose of managing which assessments specific groups of users are required to take.
- Manage Roles and Widgets –This widget is similar to security permissions. Depending on the role and the widgets associated to that role, will define what a user has access to.
- Manage System Settings This widget 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 widgets.
- Manage Users and 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 widgets associated to the role.
- SkillsRoute Transfer agent and 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 from DNA Link routing Skills to DNA, to allow updating of Skill data from calculated DNA values.
- Update the 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 organisation, filtered in various ways.
- View User Certificates View and print your completed certificates.
- Your DNA Mapping Show the DNA mappings for the current user.
- Manage Knowledge Nudges Used for creating, editing, deleting, searching and previewing knowledge nudges.
- Manage Learning Items Used for creating, editing, deleting, archiving and associating learning items with DNA components.

An additional 'Messaging Log' widget may also be present depending on whether the Skills Assessor Email Notification Service has been enabled.

Genesys Skills Assessor Senesys⁻ Hello, Gerry Cafolla Logout My Development Reports Manage Groups & Users System Settings Manage Assessments 💿 ... Add stuff.. Manage Roles & Widgets 🖌 Options 🛸 Refresh 🔇 List of roles: User Count Widget Count Template Tabs Users Widgets Filter idgets Select the 16 Administrator 3 My View your progress through the assessments that have been assigned to you, and Development take any that are outstanding Assessment Designer 0 1 role and Manager 7 4 Reports Report on individual or team scores Feedback Test 2 Report to display Feedback then click Renort Admin Reports Administration Reports on Widgets. Branding Change Branding Feedback Models Define Feedback Feedback Report Report to display Feedback Knowledge Nudge Report Report on time and usage of Knowledge Nudge KPI Dashboard Dashboard view of results Licensing View and update your licensing information

To add additional widgets to the role click on 'Widgets' in the widget selection box.

Right click on the required widget and select 'Add to role'. This will then be available for any users to access who are associated to the role.

Users	Widge	ts Template Tabs			
Widgets in role	User		^		
Widget	Des				
My Development		w your progress through the assessments that have been assigned to you, and e any that are outstanding	Ш		
Reports	Rep	ort on individual or team scores			
Feedback Report	Rep	ort to display Feedback	~		
Widget		Description	^		
Admin Report Add t		Ardmins tration Reports Branding	=		
Feedback Models		Define Feedback			
Feedback Rep	ort	Report to display Feedback			
Knowledge N Report	udge	Report on time and usage of Knowledge Nudge			
KPI Dashboar	d	Dashboard view of results			
Licensing		View and update your licensing information	~		

Template Tabs

The template tab is used to define the view that the user is presented with after logging on to the system.

In the User example below anyone associated to that role will automatically have two widgets displayed in their home page:

- Reports with the Report widget displayed
- User with the individual's assessments visible.

The widgets associated to the role, as per the example on the previous page, are visible in the Widget selection box.

, Gerry Cafolla	Manage	Groups & Users	ystem Settings Mai	nage Assessm	ents 🛛 🕥	La ba
e Roles & Widgets	wanage	oroups de osers	ystem settings (Iwia	lage Assessin		✓ Options ⊈ Refre:
t of roles:	User Count Filter	Widget Count		/	Users Template tabs i	Widgets Template Tabs
dministrator	3	16		(here to add a new template tab
ssessment Designer	0	1			 Reports Rep 	
lanager	7	4			🔪 🖃 User	
est	0	2				Development
ser	14	з		(Widget	Description
					My Development	View your progress through the assessments that have been assigned to you, and take any that are outstanding
					Reports	Report on individual or team scores
	Wi	dget selec	tion box	$\left\{ \right.$	Feedback Report	Report to display Feedback

Example of what a user would be presented with based on the template above.

Senesys		Genesys	Skills Assessor
Hello, Jane Doe			Logout
Reports User 📀			Add stuff
My Development			🖌 Options 🛸 Refresh 🧕
Assessments (by Group) Assessments (by Date)			
Group Name	Date By	% Complete	% Average
Consumer Sales		22.22	58.57
Pre-Sales Team			62.22
Genesys New Group			25.53
Individually assigned assessments		100.00	0.00

To create an additional tab in the user template, right click on the 'right click here to add a new template tab' and click on 'New Tab'.

Manage	Groups & Users	ystem Settings 🔪 Manage Assessments 🔪 Reports 👋 User 🔰 💿	Add
			🧨 Options 🤹 Refresh
User Count ter	Widget Count	Users Widgets Template Tabs Template tabs in role:	~
3	16	O New Tab	
0	1		
7	4	User	
0	2	My Development	S
14	3	Widget Description	
		My View your progress through the assessments that have be Development take any that are outstanding	en assigned to you, and
		Reports Report on individual or team scores	
		Feedback Report Report to display Feedback	
	Count ter 3 0 7 0	Count Count 3 16 0 1 7 4 0 2	Count Count a 16 0 1 7 4 0 2 14 3 Widget Description Wy Development Widget Description Wy We vour progress through the assessments that have be Development Reports Reports Reports Reports

A new template tab will appear.

Senesys [®]			G	enesys Skills Assessor
Hello, Gerry Cafolla				Logout
My Development Reports	Manage	Groups & Users	System Settings 🛛 Manage Assessments Reports User 💿	Add stuff
Manage Roles & Widgets				🧨 Options 🔹 Refresh 🧕
	User Count Filter	Widget Count	Users Widgets Template Tabs Hight-click here to add a new template tab Reports	
Administrator	3	16	Reports	
Assessment Designer	0	1	🗐 User	
Manager	7	4	No Development	
Test	0	2	(User)	~
User	14	3	Widget Description	
			My View your progress through the assessments that have to Development take any that are outstanding	een assigned to you, and
			Reports Report on individual or team scores	
			Feedback Report Report to display Feedback	
				~

Double click on the new template name to rename the template tab or right click and select 'Rename Tab'.

Genesys [.]				Genesys Skills Asses
lo, Gerry Cafolla				Log
y Development Report	s Manage	Groups & Users	stem Settings Manage Assessments Reports	User 💿 Add s
age Roles & Widgets				🖌 Options 🛸 Refresh
List of roles:	User Count Filter	Widget Count	Right-click her	dgets Template Tabs re to add a new template tab
Administrator	3	16	Reports	
Assessment Designer	0	1	Report: User	3
Manager	7	4		<u>velo</u> pment
Test	0	2	User	
User	14	3	Widget	Description
				View your progress through the assessments that have been assigned to you, and take any that are outstanding
			Reports F	Report on individual or team scores
			Feedback Report	Report to display Feedback
			L	
				V

Г

Select the widget to associate to the new tab by right clicking on the widget and selecting 'Add to tab'.

Genesys [.] Io, Gerry Cafolla						Genesys Skills /	Log
ly Development Repor	ts Manage	e Groups & Users	System Settings	Manage Assessm	ents Repor	ts User 🔘	Add s
nage Roles & Widgets						🖨 Options 💈	Refresh
List of roles:	User Count Filter	Widget Count			Users V Template tabs in	Vidgets Template Tabs	^
Administrator	3	16				ere to add a new template tab	
Assessment Designer	0	1			Reports Repo	urts	=
Manager	7	4			🔳 User		
Test	0	2			My E	Development	~
User	14	3			Widget	Description	
					My Development	View your progress through the assessments that have been assigned to you, and take any that are outstanding	
					Reports	Report on individual or team scores	
					Feedbark Report	Report to display Fredor. Add to tab	
							~

To set the associated widget as mandatory and therefore not possible to delete, right click on the widget and select Toggle mandatory status.

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 Widgets can then be associated and a template containing the widgets can be created.

Genesys ⁻				Genesys Skil	lls Assesso
lello, Gerry Cafolla					Logo
My Development Report	:s Manage	e Groups & Users	System Settings Manage Assessments Repo		Add stu
Aanage Roles & Widgets				🖌 Opti	ons 🛸 Refresh 🤇
List of roles:	User Count Filter	Widget Count	Users Template tabs i	Widgets Template Tabs	^
Administrator Assessment Designer	3	16	Reports		
Manager	7	4	I User	oorts	
Test	<u> </u>	2	My	Development	~
User 💿 New Role	14	3	Widget	Description	
Rename Remove Role			My Development	View your progress through the assessments that have been assigned to you take any that are outstanding	i, and
			Reports	Report on individual or team scores	
			Feedback Report	Report to display Feedback	

Creating Customized User Views

Once a role has been created with widgets associated to the role, it is now possible for a user to customize their application.

By right clicking on the end tab, the option to enter a new tab name is available. Enter a new name and select ok.

ello, Jane Doe			Log
Reports User 🔇			Add s
y Development			🧨 Options 🛸 Refresh
Assessments (by Group) Assessments (by Date)			
	The page at localhost says:	M Comolete	01 4
iroup Name	Enter the name for the new tab (maximum 50 characters)	% Complete	% Average
ionsumer Sales	New Tab Name	22.22	
nnual Feedback Review from Agents	an 2010	0.00	
atest Product Launch - Support Information	OK Cancel	0.00	
kyblue Products		0.00	
lobilephone Consumer Sales	25 Jul 2010	100.00	62.22
Phone Support	11 Jul 2010	0.00	
nsurance Knowledge	18 Dec 2009	0.00	
lackberry Support	19 Jul 2010	100.00	54.92
eadership Capability Program		0.00	
est Feedback3		0.00	
re-Sales Team		33.33	62.22
			25.53
ndividually assigned assessments		100.00	0.00

Once the new tab has been created, click on 'Add stuff' and the 'Add Widgets' option is then presented. Click on 'Add to associate the Widget to the tab'. Once the Widget has been selected and marked as 'Added' use the X in the top right hand corner to close the window.

GENESYS	🕄 Add Widget 🔗 🌘	þ	Genesys Skills Assessor
Hello, Jane Doe Reports User New Tab Name 🔘	Feedback Report Image: Constraint of the second		Logout Add stuff
	any that are outstanding	8	After the widget has been added click on the 'X' in the top right hand side to close the window.
	Search :		

Manage System Settings

In the 'Manage System Settings' widget, 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 together with any other relevant information for the user. The mandatory information is unique information required to identify the individual agent. This information is also used for reporting purposes and for viewing filtered DNA. The user field's information is also visible against the individual in the Hierarchy to be covered later in this document.

Additional user fields can be added by entering the information and select +.

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.

Genesys			Genesys Skills Assessor
Administrator User Manage Users anage System Settings User Pields Field Mappings Widget cearrange the order of the fields, click and drage	Reports Analytics Routing DNA Admin DNA	Reporting Admin Manage Assessments 🥥	Change Font: A A A Add Stuff
Last Name 11 First Name 11 Last Name 11 < Company 11 < Region 11 < Team 11 < Lossion 11 < Lossion 11 < Monager 11 <	Enter any additional user	User detail in Skills	
	fields here.	Edit User Details Assign Assessments Login ID jsmith Last Name Smith	
		First Name John Function Department Location	
		Cost Centre Email EIN Validating system: SkillsAssess M	
		New Password	
		Delete	Apply

Field Mappings

The 'Field Mappings' information is used as security for Skills Assessor to identify individual users when they log on to the system. In the example below the 'Login ID' is expected and therefore the user would be logging in as 'bandrews'.

Senesys:	Genesys Skills Assesso
Hello, demo demo	Logo
Administrator User Manage Users Reports Analytics Routing DNA Admin DNA Reporting Admin Manage Assessments 🖉 Manage System Settings	Change Font: A A A Add S
User freids Neid Mapping: Wingers General Settings To rearrange the order of the freids, click and drag one of the green up-down locnd ()) up or down the table. Login 10 Login 10 11 Lexibure 11 X Region 11 X Location 11 X Manager 12 Image: 12	
Edit User Details Assign Assessments Lagin 10 junith Last Norie (smith)	
International In	
Validating system: Skillskassess @ New Password Confirm Password Is user archived? Extend Ext	

Senesys Wekome			Genesys Skills Assessor	
Welcome	These details are case anothe These details are case anothe Enter Your Details UserName Passevrd Select System ChillsAssessor (w) Continue	ord below		Skills Assess expect this u jsmith as the Name' when
	Trouble logging in? The ansatz wave a Cashington member your login detail To try and remedy this, check that your browser is able to	n Mysier forme er in undelte te notzen Gastine, van witt net te alle te ingen netzen Gastine, er try denorgi peur Gastine aucha.		

sor will iser to use eir 'User

n they login.

Widgets

The Widgets tab allows additional widgets to be included in the application by entering the required information and the relevant url.



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 - report view on completion of an assessment.

Assessment Defaults - leave this selected as default.

Combined Tests require signing with a password – This setting toggles whether combined feedback assessments must be signed via a password by the user who isn't logged in to the system when participating in a combined feedback assessment.

Message manager on assessment completion – This checkbox toggles the Email Notification Service on/off

Email field – This select box should be set to the user field that is used to store users' email addresses. This field is used by the Email Notification Service if it is enabled.

User Fields 🔨 Field Mappings	Widgets General Setting		
Other settings			
Analysis min data points	βο		
AICC Student ID Field	Login ID		
AICC Suppress Put Param	false		
CSV Extension	csv		
Pass Text	SUCCESSFUL - blue		
Fail Text	UNSUCCESSFUL - blue		
Kite Diagram Enabled	N		
Assessment Defaults			
Combined Tests require signing with a password	N		
Message Manager on Assessment Completion	V		
Email Field	email 💌		

Manage Groups

Groups are created in Skills Assessor for the purpose of managing which assessments specific groups of users are required to take. The assessments are used to test and verify the users to either confirm that they have the skills to do their job roles competently or identify a training requirement which enables the organization to identify and understand who has what skills. By assigning users and assessments to specific groups this ensures that the assessments are managed effectively and efficiently, that is, everyone in the group gets all the associated assessments.
Select the 'Manage Groups' widget and visibility of any existing Groups will be presented. There is a counter which identifies the number of assessments within the group together with the number of users.

New Groups can be created by right clicking on an existing group and select 'New Group'.

llo, Gerry Cafolla							Lo
Ny Development Reports	Mana	ge Groups & Users	System Settings Manage	Assessments My	Development Rep	orts 🛛 🕥	bbA
nage Groups					🧨 Options	🔹 Refresh 📀	Manage Groups
List of groups:	User Count ilter	Assessment Count	Users in group Skills I				Assign assessments to groups of users by creating a group
Consumer Sales	13	9	Login ID	First Name	Last Name		
Genesys New Group	7	3	demo	Gerry	Cafolla	_	X Remove
Health Care New Starters	1	2	bdownes	Bernard	Downes		Manage Roles & Widgets
Mortgage Selling	4	1	jdrews	Julianne	Drews	_	Manage Users & Hierarchy
		_	dgorman	Dave	Gorman		≥ Reset Tests
New Starters Q4 2009	2	1				~	■ Training Portal
NHS	1	2		archy			
Pre-Sales Team	4	3	Search for user:	Go	Page	• 1 of 3	
Skills Maur New Group	\geq	1	Login ID	First Name	Last Name		
Test Group Rename		8	Tanderson	Thomas	Anderson		
🗙 Remove Group	,		bandrews	Bob	Andrews	=	
			pardon	Peter	Ardon		
			bbaxter	Bob	Baxter		
			Hayley	Hayley	Binns		
				Dirk	Braun		

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.

Clicking on the 'Users' tab will present the users.

lo, Gerry Cafolla								
ly Development Reports	Manag	ie Groups & Users	System S	iettings Manag	ge Assessments My	Development Rep	orts 💿 💈 Refresh 📀	Manage Groups
List of groups:	User Count Filter	Assessment Count	(Users in group Con:				Assign assessments to groups of users by creating a group
Consumer Sales	13	9		Login ID	First Name	Last Name		¥ .
Genesys New Group	7	3	ſ	bandrews	Bob	Andrews		X Remove
Health Care New Starters	1	2		pardon	Peter	Ardon		Manage Roles & Widgets
Mortgage Selling	4	1	1	bbaxter Hayley	Bob	Baxter Binns		Manage Users & Hierarchy
New Starters Q4 2009	2	1		demo	Hayley Gerry	Cafolla	~	≥ Reset Tests
NHS	1	2			erarchy	Calona		Training Portal
Pre-Sales Team	4	3		Search for user:	Go		<u> </u>	
Skills Mauritius	4	1		123		-	≘1 of 3	
Test Group	6	8		Login ID	First Name	Last Name		
rest oroup	0	0		Tanderson	Thomas	Anderson		
				bandrews	Bob	Andrews	=	
				pardon	Peter	Ardon		
				bbaxter	Bob	Baxter		
				Hayley	Hayley	Binns		
				dbraun	Dirk	Braun		

To add a user into the group right click on the user and select 'Add selected user(s)'. There is also the option to view where the user is within the hierarchy, by selecting 'Find user in hierarchy'.

llo, Gerry Cafolla								Log
fy Development Reports	Manag	e Groups & Users	System Settings	Manage Ass	ssments	/ly Development	Reports 🔨 🕥 .	Add
nage Groups						🖌 Opt	ons 🦈 Refresh 🤇	Manage Groups
List of groups:	User Count Filter	Assessment Count		group Consumer	Sales		<u>^</u>	Assign assessments to groups of users by creating a group
Consumer Sales	13	9	Login		First Name	Last Name Andrews		× Remove
Genesys New Group	7	3	pardo		Peter	Ardon		
Health Care New Starters	1	2	bbaxt		Sob	Baxter		➢ Manage Roles & Widgets
Mortgage Selling	4	1	Hayle		Hayley	Binns		 Manage Users & Hierarchy Reset Tests
New Starters Q4 2009	2	1	demo		Gerry	Cafolla	~	■ Reset Lests
NHS	1	2	Sear	h Hierarch				 Training Forta
Pre-Sales Team	4	3		or u er:	- GO		^	
Skills Mauritius	4	1	1 2 3				Page 1 of 3	
Test Group	6	8	Login		First Name	Last Name		
			Tande		Thomas	Anderson		
			bandr		Bob Peter	Andrews		
			bbaxt		Bob	Baxter		
			Hayle		Hayley	Binns		
			dt	Add selected us		Braun		

Ay Development Report	s Manage	e Groups & Users		
hage Groups			System Settings 🔨 Manage Assessments 👋 My Development 👋 Reports 👋 💿	Add
			na Sefresh 🕗 🗅 Manage Groups	
List of groups:	User Count Filter	Assessment Count	Users Assessments Assessments to groups of users by creating a group	
Consumer Sales	13	9	Assessment Available From Until	
Genesys New Group	7	3	Feedback Review from El dear 29-Jan-2010	
Health Care New Starters Mortgage Selling	4	2	Agents Manage Users & Hierarchy	
New Starters Q4 2009	2	1	Latest Product	
NHS	1	2	Index Interior Interi	
Pre-Sales Team	4	3	🕷 💼 Blackberry Support	
Skills Mauritius	4	1	🗷 💼 BT Vision	
Test Group	6	8	🗑 💼 Feedback Assessment to Test Feedback Models	
			E in Genesys Pre-Test System Consultant, Inbound Voice	
			🛞 💼 Genesys Pre-Test V2	
			💌 📊 Health Care	
			🐨 🖬 IPhone Support	
			🖲 💼 Genesys Pre-Test V2	

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.

Once an assessment has been associated to a Group an 'Available From' and 'Until' date can be assigned to the assessment. This will make sure that the users cannot take the assessment before it is required and that the assessments are completed by the due date as the required date is visible against the assessment.

To set the completion date for an assessment, click on the calendar icon in the 'Available from' and 'Until' window and a calendar will be presented to select the relevant date. Once dates have been entered these will show against the assessment and appear in the 'User Development' screen against the assigned assessment.

lo, Gerry Cafolla									
ly Development Reports	Manag	ge Groups & Users	System Settings Manage Assessments	My Dev	elopmer	t (I	leports	(💽 .	
age Groups						🛃 Optio	ns 🤹 Ref	resh 🤇	Manage Groups
List of groups:	User Count Filter	Assessment Count	Users Assessments Assessments in group Consumer Sales						Assign assessments to groups of users by creating a group
Consumer Sales	13	10	Assessment Available From			Until			× Remove
Genesys New Group	7	3	Annual Feedback		-Jan-201				
Health Care New Starters	1	2	Agents	_			🗄 dear		Manage Roles & Widgets
Mortgage Selling	4	1	latest distant	Augus		- F 1			 Manage Users & Hierarchy Reset Tests
New Starters Q4 2009	2	1	Product 31 26	T W			S 1 clear	~	 ■ Reset Tests ■ Training Portal
NHS	1	2	Annual Feedback Revie 32	27 28 3 4	29 30 5 6		8	^	• Training Portai
Pre-Sales Team	4	3	📧 💶 Blackberry Support		12 13		-		
Skills Mauritius	4	1		17 18	19 20	21 3	2	=	
Test Group	6	8		24 25	26 27	28 2	9		
			🛞 🚮 General 36 30			4	5		
			Genesys Pre-Test System Consultar Image: Genesys Pre-Test V2	it, Inbour	d Voice				
			🕷 📊 Genesys Pre-Test V2						
			📧 🚮 Theore Support						
			🔳 📶 Insurance Knowledge					~	

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.

ENESYS solution table		Genes	s Skills Assess
lello, Gerry Cafolla			Logo
My Development Reports Manage Groups & Users System Settings Manage Assessm	nents My Development Reports	O	Add st
ly Development			🖌 Options 🤹 Refresh
Assessments (by Group) Assessments (by Date) Feedback on other users (3)			^
Group Name	Date By	% Complete	% Average
New Starters Q4 2009		41.18	0.00
Consumer Sales			3.09
Annual Feedback Review from Agents	29 Jan 2010	0.00	
Latest Product Launch - Support Information		0.00	
Skyblue Products		100.00	9.26
Mobilephone Consumer Sales	25 Jul 2010	50.00	
Phone Support	11 Jul 2010	0.00	=
insurance Knowledge	18 Dec 2009	41.18	
Blackberry Support	19 Jul 2010	37.50	
eadership Capability Program	29 Aug 2010	100.00	
Fest Feedback3		100.00	
Mortgage Selling		0.00	0.00
Pre-Sales Team		30.39	0.00
Health Care New Starters		18.75	0.00
skills Mauritius			0.00
Genesys New Group		33.33	25.00

Assigning Users into Groups Based on Hierarchy

There is also the option to assign users into Groups based on hierarchy.

Select the 'Hierarchy' tab and then once the required user has been selected, right click and select either 'Add user(s) in this position' – which will only add the selected user

Or

'Add user(s) in all subpositions' which will add all of the subordinates underneath the initial user, into the selected Group.

llo, Hayley Binns							Log
Ay Development Reports	Manage	Roles and Groups	Manage Assessments	Administrator Skillsa	nalysis 💽		Add s
nage Roles & Widgets						🐔 Opti	ions 🤹 Refresh
List of roles:	User Count	Widget Count		Users Widge	ts Template Tabs		
	Filter	Count		Users in role Assessm	ent Designer		~
Administrator	2	19		Login ID	First Name	Last Name	
Assessment Designer	0	1		No records to display	,		
		-					
Manager	9	5					×.
Super Administrator	1	18			archy		
User	92	5		CEO			~
				Bob Andrews			
				Carl Ad	d user(s) in this position		
				H Adr Ad	d user(s) in all subpositions)	

Manage Assessments

Assessments are created and managed in the Manage Assessment widget.

After selecting the widget the manage assessment window will be presented as per the example below.

There are four modules available:

- 1. Design create and design the assessment
- 2. Assign assign a selected assessment to one or a group of users
- **3.** Reports print an assessment
- **4.** Import/Export import existing assessments, export an assessment to share or export for use in an LMS

To create a new assessment click on 'create assessment'.

Manage Assessments	The option to view assessments created by 'Me' or 'Everyone' is also available.			Additional search filters are also available.
Design Create Assessment Design Assessment Assign	Assessments owned by Me		Search (in as	ssessment and content) 🖳 🛛 Show additional filters 🔮 Search
Assign Assessment Reports View Printable Version Import & Export Import	Assessment Name Mobilephone Consumer Sales NEW trainer selection option test K < 1 > X Page Size 10 •	Assessment code 123	Date created 22/01/2013 13 13/12/2012 13 12/12/2012 13	3:59 No
Export Export to AICC package		Any existing assessments will listed. Double cl view / edit them	lick to	

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

Genesys			Genesys Skills Assess
<mark>ello, demo demo</mark> Administrator User Manago Users Reports Analyti famage Assessments	s Routing DNA Admin DNA	Reporting Admin Manage Assessments 🛛 🕥 \	Log Change Font: A A A Ado Coptions 🛱 Refresh
C Design assessment - ∰NEW	First Question 2002 Edit 2015 Some 2010 Insert "Do Not Know" automatically for M Els NEW Dasic Test Navigation Test Assessment code Introductory text		
	Pass mark Is this test timed?	÷	
	Type of Assessment These values cannot be changed if the ass Is this a Feedback Only assessment?	essment has been assigned to users.	
	Archival Assessment is archived		

Rename the assessment by clicking on 'New' in the left hand box. In this example the assessment has been renamed as 'Test Assessment'.

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

Senesys [.]			Genesys Skills Assessor
Hello, demo demo			Logout
Administrator User Manage Users Reports Analytics Manage Assessments	Routing DNA Admin DNA F	Reporting Admin Manage Assessments 🕜	Change Font: A A A Add Stuff Change Font: A A A Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A C A C Add Stuff Change Font: A A A A A A Add Stuff Change Font: A A A A A A A A A A A A A A A A A A A
	Prise Question @ Eals Prise Question Test Roow Test Assessment Basic Test Navigation Test Reset Assessment code Introductory test Pass mark Is this test timed? Type of Assessment These values cannot be changed if the assessme Is this a Feedback Only assessment? Archival	Click on Edit to configur basic information.	🐔 Options 🍄 Refresh 🔇

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 box if this is for an LMS. Customized introductory text can be created in the 'Introductory' text box. Enter a required overall pass mark in the Pass mark box.

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

Senesys			Genesys Skills Assessor
Hello, demo demo			Logout
Administrator User Manage Users Reports Analytics	Routing DNA Admin DNA	Reporting Admin Manage Assessments 💿	Change Font: A A A Add Stuff
Manage Assessments			🖌 Options 📽 Refresh 🔇
Design assessment	First Question 🛛 🔊 Edit 🖌 🖌 C	tansal	
	Insert "Do Not Know" automatically for Mult		
	ݭ Test Assessment		
	Basic Test Navigation Test Re	eset Knowledge Nudge Certificate Reports	
	Assessment code		
		B I U A ▼ 등 등 ⋶ 送 & Calibri ▼ 9pt ▼ 3	
			E
	Introductory text		
		🥕 Design 📣 HTML 🔍 Preview	
	Pass mark	85 🗢	
	Is this test timed?		

If the assessment is a feedback only assessment, then select 'is this a Feedback Only assessment'. To archive an assessment select 'Assessment is archived'.

		Genesys Skills Assessor
		Logout
Counting DNA Admin DNA	Reporting Admin Manage Assessments	Change Font: A A A Add Stuff
Introductory text	B Z U A • E E E I Calibri • 9pt • S	
	Design ↔ HTML ♀ Preview	=
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Click on Save when completed.

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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.

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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.

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To create a new question, right click on the Content and select 'New Question'.

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Right click on 'New Question' to select the appropriate question type.

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 may be used for the user to search for the correct answer.

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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.

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Change the question type.	Show Answers in Random Order Answer I Answer 1 Answer 1 Answer 2 Insert 'Do Not Know' Insert 'Do Not Know' Change Question Type To change this Multiple Choice question to a Pick Carrect question, click on the link below. You may also change a Pick Carrect question to a Multiple Choice question. Change to a Rick Carrect question to a Pick Carrect question, click on the link below. You may also change a Pick Carrect question to a Multiple Choice question. Change to a Rick Carrect question

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

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After selecting 'Image' the following window will appear for browsing and selecting 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.

] Edit Answer	X
Answer Image Media Select File Select an image file to upload. The allowed file types are: .jpg, .jpeg, .gif, .png Click the button below to upload the file.	Browse for the required image before uploading.
Preview	

To create the next question associated to the Content, right click on the content and select 'New Question'.

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Hot Spot Questions

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Follow the instructions to define the hot spot answer area.



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	To set the Hot Spot Image, see the area to the right. You may optionally attach audio or video media to this question. Ar Rese be aware that changing or removing the Hot Spot Image will invalidate and remove your list of answers.	2
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Simple Text Question

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Numeric Question

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Feedback Questions

Feedback questions cannot be combined with any other question types.

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In this example a separate Content level has been created for	Feedback Question	Once the feedback question has been entered, build the feedback ratings by entering the minimum and maximum number of ratings required.
Feedback Questions.	Answer Percentage of Sci No possible answers have been added yet. Build Feedback Ratings Minimum : Maximum : Build Save Template Feedback Template Save Template	Save the ratings created as a template for future use.

After selecting Build the number of minimum and maximum ratings will be presented for completion.

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

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

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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.

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It is possible to change the order of content sections and questions by dragging them to a new

location within the assessment's element hierarchy.

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

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Test Navigation



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Test Reset



Knowledge Nudge

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Certificates

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Reports

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Is the user able to view their results on completion.		There is the option of recording the trainer within the assessment
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To assign an assessment, select an assessment from the main table and click the 'Assign Assessment' link. A new screen will appear allowing you to search for users to whom the assessment will be assigned. It is possible to search based upon date ranges, user fields, other assessments assigned to users, DNA components, roles and groups. Once you have entered search criteria, click the 'Search' button. Any results will be displayed in the table below. Check the checkboxes in the first column of the table to select the users to whom the assessment will be assigned, then click the 'Assign' button. A dialog box will appear requesting that you confirm your choice, click OK to finalise the assigning of users to the assessment.

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

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(mport & Export				Page 1 of 1, items 1 to 3 of 3

Import / Export

Creating Knowledge Nudges

Knowledge nudges are used when there is some information that the user has to read before taking 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's ability to display PDF's allows rich PDF content to be displayed. 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.

In order to add a Knowledge Nudge to an assessment select the Knowledge Nudge tab in the assessment builder, as per the example below.

📄 Design assessment			
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Select whether you require your Knowledge Nudge to be a website external URL or a PDF by selecting the relevant radio button.

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

nowledge nudge document type	©PDF	
	ORL Link	
Knowledge Nudge	http://www.myurl.com	

Alternatively if you wish to upload a PDF to Skills Assessor to be used as your Knowledge Nudge this can be done by selecting the PDF Radio Button. This will display a browse button for you to locate the PDF document on your computer, as shown.

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knowledge nodge document type		Select
	Click the button below to upload the file.	

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.



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.



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 Hyperlinl	_	? ×
Link to:	Text to display: < <selection docum<="" in="" td=""><td>nent>> ScreenTig</td></selection>	nent>> ScreenTig
Existing File or Web Page Place in This Document Create <u>New</u> Document	Select a plage in this document: First Slide Last Slide Next Slide Previous Slide Slide Titles 1. Slide 1 2. Slide 2 3. Slide 3	Slide preview: EMERCENCY ENTS
E- <u>m</u> ail Address	Custom Shows	british and result for the second secon
		OK Cancel

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	e Nudges	a contraction from the	- ↓ ₇	Search Knowledge	Nud 🔎
Organize 🔹 New folder	r			811 -	0
 Microsoft PowerPo Workspaces Favorites Desktop Downloads Dropbox Recent Places 	Name	Date modified No items match your search.	Туре	Size	
File name: cityLIN	NK Airlines Flight Safety				•
Save as type: PDF					•
Authors: Brian		Tags: Add a tag	Title	e: PowerPoint Prese	ntation
Dpe	Options en file after publishing	 Standard (publishing online and printing) Minimum size (publishing online) 			
Hide Folders		Тоо	ls 🔻	Save	incel

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.



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.



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	5
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 Height: 240

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.





Assessment Details

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. 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

Managing Knowledge Nudges

The 'Manage Knowledge Nudges' widget can be used to search, create, edit, delete and preview knowledge nudges. Existing knowledge nudges are listed in the middle of the widget. The management and preview controls are on the left side of the widget. The searching controls are at the top of the widget as shown in the image below.

Manage Knowledge Nudg	es			🖌 Optic	ons 🛸 Refresh
Manage	Search Type	Tag 💌	Owner	Me	•
Create Nudge Edit Nudge Delete/Archive Nudge	Search Term	Search	5.		
Preview			Show Archived Nudges	Only 🗖 Gro	oup by Tag 🔽
Preview Nudge	续 了一个				
	Nudge Title			Nudge Type	Date created
	👻 🛛 Tag: Broa	dband		AT 2	a)
	Broadband Si	ales Knowledge Nudge		URL	22/01/2013 16:20
	К <1>>	Page Size 10 🔻	Pa	ige 1 of 1, iten	ns 1 to 1 of 1
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 have the option of either completing their part of the feedback assessment or immediately creating a combined feedback assessment without completing their own version of the assessment first. The combined feedback assessment will require that the manager and the agent collaboratively take the assessment again and agree on the answers provided to the questions using the Manager's Skills Assessor account. The agent will then be required to provide their password to confirm that they agree with the provided answers.

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 and Manager
	Only require user feedback before combined test?

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.

	× × ×		Logo
My Development Reports Manage Groups & Users System Settings Manage Assessments My Development	Reports 🛛 🕥		Add st
ly Development			🥕 Options 🛸 Refresh
Assessments (by Group) Assessments (by Date) Feedback on other users (3)			
Group Name	Date By	% Complete	% Average
New Starters Q4 2009		41.18	0.00
			3.09
Mortgage Selling		0.00	0.00
Annual Feedback Review from Agents	30 Nov 2009	0.00	
Pre-Sales Team		30.39	0.00
			0.00
			0.00
			25.00
NHS			0.00
			27.80
			3.09

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

ello, Gerry Cafolla			Logo
My Development Reports Manage Groups & Users	System Settings Manage Assessments My Development Report	5 3	Add stu
ly Development			🕹 Options 💈 Refresh 【
Assessments (by Group) Assessments (by Date) Feedb	back on other users (3)		
Assessment Name	Feeding back on	Date By	% Complete
eadership Capability Program	Christine Lace	29 Aug 2010	50.00
eedback Assessment 2	Christine Lace		0.00
uly Leadership Capability Program	Christine Lace		0.00

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

Genesys		Genesys	Skills Assess
ello, Gerry Cafolla			Logo
My Development Reports Manage Groups & Users	System Settings Manage Assessments My Development F	Reports 💿	Add st
ly Development			🖌 Options 🛸 Refresh
Assessments (by Group) Assessments (by Date) Feedba	ick on other users (3)		
Assessment Name	Feeding back on	Date By	% Complete
eadership Capability Program	Christine Lace	29 Aug 2010	50.00
eedback Assessment 2	Christine Lace		0.00
uly Leadership Capability Program	Christine Lace		0.00

Email Notification Service

It is possible to configure SkillsAssessor 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 'SkillsAssessor 8.1.1 Email Notification Service' document for instructions relating to the installation and configuration of this service.

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'.

illo, Gerry Cafolla		Log
My Development Reports	Manage Groups & Users System Settings Manage Assessments My Development Reports 🔘	Add
nage Users & Hierarchy	🖌 Options 🖞 Refresh 🧕 🎽 Manage (Groups
Genesys Skills Assessor		Roles & Widgets
Create New User Hayley Binns	Edit User Details Assign Assessments	ests

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'.

Genesys [.]			Log
My Development Reports	Manage Groups & Users System Settings Manage Assessments	My Development Reports 💿	Add s
nage Users & Hierarchy		🧭 Options 🛸 Refresh	≥ Manage Groups
Genesys Skills Assessor		- 6 🗙	Manage Roles & Widgets
🕑 Create New User	Edit User Details Assign Assessments		Manage Users & Hierarchy
Hayley Binns	Assessment Available From Feedback Assessment to Test	Until	Define the structure of your organisation and manage the users within it.
	Feedback Models		× Remove
			¥ Reset Tests
			➤ Training Portal
		~	
	Annual Feedback Review from Agents	<u>^</u>	
	🗑 🚮 Blackberry Support	=	
	BT Vision Feptback Assessment to Test Feedback Models		
	Add assessment to user	>	
	🗰 🛻 Genesser Fre-Test System Consultant, Inbound Voice		
Right clic	k on the	v	
• · · ·	ssessment.		

The individually assigned assessment will be visible under 'individually assigned assessments' in the selected user's 'My Development' widget.

iello, Gerry Cafolla			Logo
My Development Reports Manage Groups & Users System Settings Manage A	ssessments My Development Reports 🥥		Add st
4y Development			🧨 Options 🤹 Refresh 🛛
Assessments (by Group) Assessments (by Date) Feedback on other users (3)			
Group Name	Date By	% Complete	% Average
New Starters Q4 2009		41.18	0.00
			3.09
Mortgage Selling			0.00
			0.00
Health Care New Starters		18.75	0.00
			0.00
			25.00
			0.00
Test Group			27.80
Individually assigned assessments			3.09
Leadership Capability Program		100.00	
Management Capability Program		100.00	
Skyblue Products		100.00	9.26
TV Deals	27 Nov 2009	0.00	

_

'My Development' Displays the Assessment due date

The 'My Development' widget 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).



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.

1						
4	Sorry	vou canno	ot launch thi	s assess	sment.	
6		,,				
				_		_
					OK	

Ability to Reset Multiple User Tests

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

Http://localhost Compared to the second	/SkillsDN 🔎 👻 🗟 🖒 🗙 🙋 localhost	×	☆ ☆
Senesys [®]		Gene	esys Skills Assessor
Hello, demo demo			Logout
Administrator Assessment Bu Reset Tests		DNA DNA Admin Analysis 🔘	Change Font: A A A Add stuff
Select a group from the fist then tick one button to rever the selected assessments [No group selection] Administrator User		eset within the selected date range will appear on the right; selec	the ones to reset and click the

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.

+ O ttp://localho	ost/SkillsDN 🔎 - 🗟 🖒 🗙 🎯 localhost	×	
Senesys [.]		Gene	sys Skills Assesso
Hello, demo demo Administrator Assessment Reset Tests	Builder / Manage Users and Groups / Reports	DNA DNA Admin Analysis 🛛 🖉	Change Font: A A A Add stuf Options The Refresh
Select a group from the list then tick botton to reset the selected assessme [No group selection] Administrator User		eset within the selected date range will appear on the right; select No users were found who have tests to reset.	the ones to reset and click the

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.



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.

Individual User Level Access to Increase Application Font Sizes

In order to improve the usability of Skills Assessor individual users have the ability to increase and decrease font sizes. To increase the font size the user can select either the small, medium or large text as shown.

This menu is available on every page of Skills Assessor in the top right hand side once the user has logged in.

It is important to remember however that if you have chosen a specific text size when creating an assessment question this will override any changes the user makes to their text size.

Create Customizable Certificates per Assessment

Creating A New Certificate

Select the manage certificate widget. 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.



You will then be able to give your assessment a name. Enter a meaningful 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.

Show inact	ive certificates
Edit	Certificate name
(+)×	
There are no ce	ertificates currently defined. Click here to create one.

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

Show inacti	ive certificates
Edit	Certificate name
A	Silver Lining Certificate

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
××	Silver Lining Certificate

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

Show inactive certificates				
Edit	Certificate nam	ne		
1	Silver Lining Ce		New Certificate	
		6	Rename Design	
			Create a copy	
			Deactivate	1

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



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.

Add Text to your certificate

abcd Cřyh Lijkl 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

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

Right-click to edit				
		Edit item		
		Delete		

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



You can then use the text editing tools as normal such as Bold, Italic and Underline as well as change the font sizes and colours 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 \square 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 (1^{st} 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 your 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.

Right-clic to insert	k
an ima	Replace image
	Delete

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 a new certificat	e image	x
Select a new image:		Browse
	Save	

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.



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 your certificate to an assessment

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.

📄 Design assessment		
Gr IIIa Gross Stat Training	Tret Overston State Save Cancel Insert "Do Not Know" automatically for Multiple Choice and Pick Correct Questions. Cross Skill Training.	
	Basic Test Navigation Test Reset Knowledge Nudge Certificate Reports Create a certificate on test pass?	

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' widget for them to view at any time in the future.

In the 'users Certificate' widget 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.

Assessments: Certificates:				
Example Iphone Assessment	Insurance Complaince Certificate - 05/08/2011 11:43:25			
	Insurance Complaince Certificate - 05/08/2011 11:56:00			

Reports

Knowledge Nudge Reports

Select the 'Knowledge Nudge Report' (this may be in the Report Widget 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.

Senesys:			Genesys Skills Assessor
Hello, Gerry Cafolla My Development Reports Manage	roups & Users System Settings Manage Assessments My D	Development Reports 📀	Logout Add stuff
Knowledge Nudge Report	oups a osers (ossien searings (manage Assessments (my c	🖉 Options 🖆 Refresh	
Report filters: Start Date: 01-Mar-2010 End Date: 14-Aug-2010	Image: Control of the selected position only Image: Control of the hierarchy Image: Control of the hierarchy		 ■ Feedback Report ▲ Knowledge Nudge Report
	The report needs to be rebuilt to reflect your s <u>Rebuild report</u>	elections	Report on time and usage of Knowledge Nudge Remove Reports

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

Senesys [.]				Genesys Skills Assessor
Hello, Gerry Cafolla My Development Reports Manage 0 Knowledge Nudge Report Report filters: Start Date: 01-Mar-2010	iroups & Users 🔷 System Settings	Manage Assessments My Development OThe selected position only	Reports 🕢 🕢	Logout Add stuff * Admin Reports * Feedback Report
End Date: 11-Mar 2010		Onto the hierarchy 1		Knowledge Nudge Report Report on time and usage of Knowledge Nudge K Remove Reports
Belect all Broadband Support Mobilephone Consumer Sales Blackberry Support NNS Mertal Health Disorders BT Vision	The re	port needs to be rebuilt to reflect your selections		

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

Senesys:				Genesys Skills A	ssessor
Hello, Gerry Cafolla					Logout
My Development Reports Manage Groups &	Users System Settings Manage Assessment	s My Development Report:	s 💽		Add stuff
Knowledge Nudge Report		🖋 Opti	ons 🛸 Refresh 횓 🎽 Admi	in Reports	^
Report filters: Start Date: 01-Mar-2010 Image: Comparison of the start Date: End Date: 14-Aug-2010 Image: Comparison of the start Date:		sition only ny 1 🗘 level(s) down		back Report vledge Nudge Report	< >
Director of Contact Centres Charti Ovisits Total D Averag Select all	uration 2 Duration Broexband Support	Ouser Onudge	Report o Nudge * Report		
Broadband Support Mobilephone Consumer Sales Blackberry Support NHS Mental Health Disorders BT Vision	Gerry Cafolla - 1	1 1.5	2		

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.

Senesys Hello, Gerry Cafolla	Genes	sys Skills Assesso Logout
My Development Reports Manage G Reports Report filters: Start Date 15-Jul-2010 Emc Date 14-Aug-2010	roups & Users System Settings Manage Assessments My Development Reports S Coptions Reports Admin Reports Coptions Admin Reports S Admin Reports Coptions Reports S Admin Reports S Feedback Report Notice the hierarchy 1 + level(s) down	Add stuf
	Select the individual from the hierarchy.	Eam scores

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 be 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.

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

Genesys			Ger	nesys Skills Assesso
My Development Reports Manage	e Groups & Users System Settings	Manage Assessments My Development Re	ports 💿	Add stuf
Reports		1	Options 🗯 Refresh 💿 🎽 Admin Reports	
Report filters: Start Date: 15-Jul-2010 End Date 14-Aug-2010		OThe selected position only ○Into the hierarchy 1	Feedback Report Knowledge Nud	
	 Skyblue Products Basic Knowledge Awareness How much Which of A custom Brand Identification Website Information Skyblue Upgrades Basics Course Feedback 	9.26%	Target: 80% ▲ Reports A Report on individua ★ Remove	al or team scores

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.

	Genesys	Genesys Skills A	SSESS
	My Development	Reports Manage Groups & Users System Settings Manage Assessments My Development Reports 💿	Add st
Question type: Multiple Choice Result Q. How much does it cost (per month) to subscribe to all Sports Channels? Sports Channels? Correct A. £36 Gerry Cafolla £100 Wrong 100 AD % Select all	En	ind Date 14-Aug-2010 III Clinto the hierarchy 1 \$ level(s) down Export * Knowledge Nudge Report * Knowledge Nudge Report * Knowle	
Select all Skyblue Products (1 Leadership Capabili Management Capab		Question type: Multiple Choice Result Q How much does it cost (per month) to subscribe to all Sports Channels? Image: Correct A. E36 Gerry Cafolla E100 Gerry Cafolla E100 Image: Correct A. E36 Minorging 100.00% Image: Correct A. E36	
	Select all Skyblue Products (1 Leadership Capabili Management Capab		

The option to export the information into an Excel spreadsheet is also available by clicking on the



Feedback Report

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'.

l o, Gerry Cafolla ly Development Reports Manage Groups & Users System Settings h	anage Assessments My Development Reports 🛛 🚳 🔪	Log Add s
dback Report		Add s Admin Reports
ent filters: Start Date 15-Jul-2010 Till End Date 14-Aug-2010 Till	Export	Preciback Report Report to display Feedback
Director of Contact Centres		X Remove
		Knowledge hudge hepart Reports
Serry Cafolla	is to be <u>rebuilt to</u> reflect your selections	
	Rebuild report	
Management Capability Program		
Leadership Capability Program July Leadership Capability Program		

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.

Genesys			nesys Skills Assess
ello, Gerry Cafolla			Logo
My Development Reports Manage (roups & Users System Settings Manage Assessments My Dev	elopment Reports 💿	Add st
edback Report		🖌 Options 🤹 Refresh 횓 🎽 Admin Reports	
eport filters: Start Date 15-Jul	2010	E Feedback Repo	нt
End Date 14-Au		Export Report to display F	eedback 🚽
Director of Contact Centres (Germ Carolin		A Remove	
i i i i i i i i i i i i i i i i i i i	I have a clear understanding of which direction the Company is going and readily contribute with any suggesting and readily contribute with any suggesting and readily contribute with any suggesting and any eternal participation and suggesting and any new projects where possible	3 4 ¥ Knowledge Nu	dge Report
Management Capability Program Deadership Capability Program July Leadership Capability Program Deadership Capability Program	I am able to communicate effectively "What of gat JIRGAA (LUSER) for all of the operational systems and feed into the development team with any recommendations I manage my teams development clear objectives and KPI measures- I understand the strategic direction that the Company is going in and I am be to motive my team		

Admin Reports

To access the Admin Reports select the Admin Reports widget 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 as per the examples below.

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'.

Hello, Gerry Cafolla My Development Reports Admin Reports Admin Reports Visit 11/00120 Visit 11/00120 Add Remove Test Result Filters:	kills Assesso
Admin Reports Image: Admin Reports Oper (Treels) Image: Administration Reports Administration Reports Image: Administration Reports Image: Administration Report Image: Remove Image: Remove Image: Remove	Logou
Add Remove	Add stu
Administration Reports Add Remove Add	
Add Remove * Feedback Report	4
Add Remove	-
Add Remove	
Add Remove	
Test Result Filters:	
est Résult riners.	
Add Remove	
Save Filters	
elect a report from the list. User Result Detail	

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

Senesys [.]				Genesys Skills Assessor
Hello, Gerry Cafolla				Logout
My Development Reports Manage Groups	& Users System Settings Manage Assessme	ents My Development Reports 🗿 .		Add stuff
Admin Reports		🥕 Options 🛸 Refi	resh 횓 🖻 Admin Re	ports 🗸 🗸 🗸
Filters User Result Detail			Administration	
Add Remove			8	
Add Remove Save Filters				

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

Genesys			Genesys Skills Assess
llo, Gerry Cafolla			Logo
My Development Reports Manage Group:	& Users System Settings Manage Assessments My Dev	relopment Reports 💿	Add st
min Reports		🎤 Options 🔹 Refresh 횓 🖬 /	Admin Reports
Filters User Result Detail 🛛		Adr	ninistration Reports
Filters applied to this report		X	Remove 🥌
lser Filters: Io filter was applied.	Test Result Filters: No filter was applied.	5 F	eedback Report
, , , , , , , , , , , , , , , , , , ,	Select an assessment nual Feedback Review from Agents ackberry Support Vision edback Assessment to Test Feedback Models neral nesys Pre-Test V2 aith Care bine Support surance Knowledge y Management Capability Program test Product Launch - Support Information biblephone Consumer Sales w Product Quit IS Mental Health Disorders fek Rating of New Cars		

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.

Genesys Skills Assessor										
Hello, Gerry C	Cafolla									Logo
My Developme	ent Reports	Manage Groups & U	sers Sustem Setti	ngs Manage A	Assessments M	he Development	Reports 🛛 🕥			Add st
Admin Reports Click on the button										
5 11	er Result Detail 🛛 🛛			K OII the	Dutton					
Filters Use	er Result Detail 🛛 🛛			1.1						
🕽 Filters applie	d to this report		to e	xpand th	e view.					
User Filters: No filter was a	pplied.	/				s: Ilied.				
Select an assessment from the list to ge the report Mobilephone Consumer Sales										
Assessment Content Question Export										
Login ID	First Name	Last Name	Date Completed	Overall result	Mobile Phones	What are the pay- monthly tariffs for Sim-only plan	Which of these Mobile Phones are exclusive to TP ²	Broadband	Where would you click to order Broadband?	Which of these a Cereal Commercial?
Login ID Question out		Last Name	Date Completed	Overall result	Mobile Phones	monthly tariffs for	Mobile Phones	Broadband	click to order	a Cereal 🔳
Question out	t of:	Last Name	Date Completed	Overall result	Mobile Phones	monthly tariffs for Sim-only plan	Mobile Phones are exclusive to TP?	Broadband 59.21%	click to order Broadband?	a Cereal ≣ Commercial?
Question out Average (8 u	t of:	Last Name	Date Completed			monthly tariffs for Sim-only plan 40	Mobile Phones are exclusive to TP? 80		click to order Broadband? 60	a Cereal E Commercial?
Question out Average (8 u pandrews	t of: sers):			63.89%	47.92%	monthly tariffs for Sim-only plan 40 43.75%	Mobile Phones are exclusive to TP? 80 50.00%	59.21%	click to order Broadband? 60 100.00%	a Cereal Commercial? 70 0.00%
	t of: sers): Bob	Andrews	13-Jan-2010 12:35	63.89% 62.22%	47.92% 16.67%	40 43.75% 50.00%	Mobile Phones are exclusive to TP? 80 50.00% 0.00%	59.21% 63.16%	click to order Broadband? 60 100.00% 100.00%	a Cereal Commercial? 70 0.00%
Question out Average (8 u bandrews bardon	t of: sers): Bob Peter	Andrews Ardon	13-Jan-2010 12:35 19-Apr-2010 11:29	63.89% 62.22% 60.00%	47.92% 16.67% 83.33%	40 43.75% 50.00%	Mobile Phones are exclusive to TP? 80 50.00% 0.00% 100.00%	59.21% 63.16% 63.16%	click to order Broadband? 60 100.00% 100.00%	a Cereal Commercial? 70 0.00%
Question out Average (8 u bandrews bandon tayley	t of: sers): Bob Peter Hayley	Andrews Ardon Binns	13-Jan-2010 12:35 19-Apr-2010 11:29 11-May-2010 20:18	63.89% 62.22% 60.00% 80.00%	47.92% 16.67% 83.33% 83.33%	40 3.75% 50.00% 50.00% 50.00% 50.00%	Mobile Phones are exclusive to TP? 80 50.00% 0.00% 100.00% 100.00%	59.21% 63.16% 63.16% 63.16%	Click to order Broadband? 60 100.00% 100.00% 100.00%	a Cereal Commercial? 70 0.00%

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'.

Senesys [.]		Genesys Skills Assessor
Hello, Gerry Cafolla My Development Reports Manage Groups (& Users 🔰 System Settings 🚶 Manage Assessments 🗍 My Development 👖 Reports 🗍 🎧)	Logout
Admin Reports	a con (your comy (may commu (ny congram (ny co	🖌 Options 🛱 Refresh 🔇
Filters User Filters: Add Remove Test Result Filters: Add Remove Save Filters	Edit User filter: Select a filter type from the list and click Add Filter: Hierarchy viscon type from the list and click Add Filter: User filter User filter Second Sove Concel Second	

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

enesys [®]		Genesys Skills Assesso
Iello, Gerry Cafolla		Logo
My Development Reports	Manage Groups & Users 🛛 System Settings 🔹 Manage Assessments 🛛 My Development 🔹 Reports 🜍	Add stu
dmin Reports		🖌 Options 🛸 Refresh
Filters		
Add Kemove est Result Filters:	Failt User Filter: Select a filter type from the list and click Add filter: User Field () Add filter Log in 10 = Delete Kagin 10 = Delete First Name Function Delete First Name Function Exercised () First Name Function Exercised () First Name Function Exercised ()	
Save Filters Load Filters		~

In the example below the field selected is Department and the department to view the results for is Customer Services. Customer Services has to be manually entered into the right hand box.

Senesys		Genesys Skills Assessor
Hello, Gerry Cafolla		Logout
My Development Reports Ma	nage Groups & Users 🔰 System Settings 🔰 Manage Assessments 🦳 My Development 👘 Reports 👘 🔘	Add stuff
Admin Reports		🖌 Options 🛸 Refresh
Filters User Filters: Add Remove Test Result Filters: Add Remove	Edit User Filter: Select a filter type from the list and click Add Filter: Department Im = Customer Services Delete Save Cancel	
Save Filters Load Filters		

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.

Hello, Gerry Cafolla My Development Reports Admin Reports Filters User SHitrs Department is 'Customer Services'	Genesys Skills Assesso
Admin Reports Filters User/EHters	Logout
Filters User Filters	Add stuff.
User Filters.	🖌 Options 🦈 Refresh
Adg Remove Test Result Filters:	

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.

Senesys:	Genesys Skills Assessor
Hello, Gerry Cafolla	Logout
My Development Reports Manage Groups & Users System Settings Manage Assessments My Development Reports 💿	Add stuff
Admin Reports	🖌 Options 💈 Refresh 🤇
Filters	<u>^</u>
User filters: Department is "Customer Services" Add Remove Test Result Filters:	2
Add Remove Save Filters	

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

Senesys:		Genesys Skills Assessor
Hello, Gerry Cafolla		Logout
My Development Reports Manage Gro	ups & Users 🔰 System Settings 📄 Manage Assessments 🦷 My Development 🦷 Reports 👘 🔘	Add stuff
Admin Reports		🖌 Options 🕏 Refresh 🥝
Filters User Filters: Department is 'Customer Services' Add Remove Test Result Filters:	Edit Test Result Filter: Select a filter type from the list and click Add Filter: Date Date Test Result	
Save Filters		

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

'Test Result' filter as per the example below.

		Genesys Skills Assess
illo, Gerry Cafolla		Logo
My Development Reports Manage (roups & Users 🔰 System Settings 🔷 Manage Assessments 🔷 My Development 🔷 Reports 🔷 😳	Add stu
min Reports		🖍 Options 🛸 Refresh 🕻
Filters		<u>^</u>
ser Filters:	Edit Test Result Filter:	
Department is 'Customer Services'	Select a filter type from the list and click Add Filter Test Result V Add filter	
	<select an="" assessment="" content=""> 🔜 Result between 0 💠 and 100 💠 Delete</select>	
	Save Cancel	
Add Remove		
		1
st Result Filters:		
Add Remove		-
ave Filters		×

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.

lello, Gerry Cafolla My Development Reports Manaq	: Groups & Users System Settings Manage Assessments My Development Reports 🕥	Logo Add st
dmin Reports Filters Jser Filters: Department is 'Customer Services'	Edit Test Result Filter: Select a filter type from the list and click Add Filter: Test Result	🖌 Options 🗳 Refresh
Add Remove fest Result Filters:	<pre><select an="" and="" assessment="" contents="" of="" s<="" select="" td="" the="" use="" we=""><td>E</td></select></pre>	E
Add		

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

Senesys		Genesys Skills Assessor
Hello, Gerry Cafolla My Development Reports Mana	age Groups & Users System Settings Manage Assessments My Development Reports 🔘	Logout Add stuff
Admin Reports	age Groups & Users 🔰 System Settings 🔰 Manage Assessments 👘 My Development 👘 Reports 🛛 🔕 🔪	🖌 Options 🔹 Refresh 🔇
Filters User Filters: Department is "Customer Services" Add Remove Test Result Filters:	Edit Test Result filter: Select a filter type from the list and click Add Filter: Test Result v Add filter Mabilephone Consumer Sales Result between 80 and 100 Delete Save Cancel	
Save Filters		

'Date' filter

	Genesys Skills Assessor
Hello, Gerry Cafolla	Logout
My Development 🛛 Reports 🔰 Manage Groups & Users 🔷 System Settings 🔷 Manage Assessments 🔪 My Development 👘 Reports 🔰 🚱	Add stuff
Admin Reports	🧨 Options 🔹 Refresh 🧕
Filters	
User Filters: Department is 'Customer Services' Department is 'Customer Services' Select a filter type from the list and click Add filter Mobilephone Consumer Sales Result between 80 ÷ and 100 ÷ Delete 14/07/2010 im to 14/08/2010 im Delete Save Cancel	

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

Senesys	Genesys Skills Assessor
Hello, Gerry Cafolla	Logout
My Development Reports Manage Groups & Users System Settings Manage Assessments My Development Reports 🔘	Add stuff
Admin Reports	🥓 Options 🛸 Refresh 🥝
Filters	
User Filters:	
Department is 'Customer Services'	
Add Remove	≡
Test Besuit Fritters:	
Assessment 'Mobiliphone Consumer Sales' result	
between 80 and 100, Completed between 14-Jul-2010	
Add Remove	
Save Filters Load Filters	

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

Hello, Gerry Cafolla My Development Reports Manage Groups & Users Sys	tem Settings 🔰 Manage Assessments 🔰 My Development 🔷 Reports 🖉 💽 🔪	Log Add s
Admin Reports		🖌 Options 💈 Refresh
Filters User Filters: Department is 'Customer Services' Add Remove Test Result Filters: Assessment 'Mobilephone Consumer Sales' result between 01 and 100, Completed between 14-Jul-2010 and 14-Aug-2010	Enter filter name Please enter a name to save the filters as: OK Cance	

Genesys		Genesys Skills Assesso
Hello, Gerry Cafolla My Development Reports Manage Groups	8: Users System Settings Manage Assessments My Development Reports 🔘	Logout Add stuff
dmin Reports		🖌 Options 💈 Refresh 🤇
Filters User Filters: Department is 'Customer Services' Add Remove Test Result Filters: Assessment 'Mobilephone Consumer Sales' result between 80 and 100, Completed between 14-Jul-2010 and 14-Aug-2010 Add Remove Save Filters Load Filters	Current report filters saved as 'Test'	

Notification given once the filter has been changed.

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.

Senesys		Genesys Skills Assessor
Hello, Gerry Cafolla		Logout
My Development Reports Manage Groups &	Users System Settings Manage Assessments My Development Reports 📀	Add stuff
Admin Reports		🖌 Options 🛸 Refresh 🔇
Filters		
User Filters:	🗐 Genesys Skills Assessor - [Load a saver report filter]	
Department is 'Customer Services' Add Remove Test Result Filters: Assessment Mobilephone Consumer Sales' result between 80 and 100, Completed between 14-Jul-2010 and 14-Aug-2010 Add Remove	Select a saved filter from the list below then click Select to load it. Clicking on a saved filter will show its definition below the list. Test User filter No filter was applied. Select Rename Delete	
Save Filters		

The filter then appears in the relevant filter box.

Senesys [.]		Genesys Skills Assessor
Hello, Gerry Cafolla		Logout
My Development Reports Manage Groups	Jsers System Settings Manage Assessments My Development Reports 🔇	Add stuff
Admin Reports		🖌 Options 🛸 Refresh 🥝
Department is 'Customer Services' Department is 'Customer Services' Addi Remove Test Result Filters: Assessment 'Mobilephone Consumer Sales' result between 80 and 100, Completed between 14-Jul-2010 and 14-Aug-2010 Addi Remove Save Filters: Select a report from the list.	Create report	

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.

Genesys	Ger	nesys Skills Assesso
ello, Gerry Cafolia		Logou
My Development Reports Manage Groups & Users System Settings Manage A	ssessments My Development Reports 💿	Add stu
lmin Reports		🧨 Options 🛸 Refresh 🤇
Filters User Result Detail 😆		
Filters applied to this report		
User Filters: Department is 'Customer Services'	Test Result filters: Assessment 'Mobilephone Consumer Sales' result between 80 and 100, Complet 14-Aug-2010	ted between 14-Jul-2010 and

User Feedback Response Percentages

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

Senesys:	Genesys Skills Assessor
Hello, Gerry Cafolla	Logout
My Development Reports Manage Groups & Users System Settings Manage Assessments My Development Reports 🔘	Add stuff
Admin Reports	🖌 Options 🛸 Refresh 🧕
Department is 'Customer Services' Image: Services is a service is in the	
Add Remove Save Filters Load Filters	
Select a report from the list. User Feedback Response Percentages Create report	

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

Genesys [.]		Genesys Skills Assessor
lello, Gerry Cafolla		Logout
My Development Reports Manage Groups	Settings 🔰 Manage Assessments 🦳 My Development 💦 Reports 🛛 🔕	Add stuff
idmin Reports		🖌 Options 💈 Refresh 🤇
Filters User Feedback Response Percentages 😆		
Add Remove Test Result Filters:		-

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

Genesys [.]					Genesys Skills Assess
Hello, Gerry Cafolla					Log
My Development Reports Manage Grou	os & Users System	m Settings M	anage Assessments	My Developme	ent Reports 🕥 Add s
dmin Reports		, i i i i i i i i i i i i i i i i i i i		(🖌 Options 💈 Refresh
Filters User Feedback Response Percentages 🛚	\				•
	\				
Filters applied to this report					
iser Filters: Io filter was applied.				st Result Filters: filter was applied.	
Export	All feedback From Self Only From Manager Only From Direct Reports C From Peers Only	only			
am able to confidently coach any individual team	All but self	ıgree	Адтее	Strongly Agree	
user(s):	0.0%	75.0%	25.0%	0.0%	
have all of the tools available for me to identi	Strongly Disagree	Disagree	Адтее	Strongly Agree	
user(s):	25.0%	50.0%	25.0%	0.0%	
	Leadership				
ead by example.	Strongly Disagree	Disagree	Адтее	Strongly Agree	
user(s):	25.0%	50.0%	25.0%	0.0%	
	Strategic Directi	on			
understand the strategic direction that the Comp	Strongly Disagree	Disagree	Agree	Strongly Agree	
1 user(s)	0.0%	75.0%	25.0%	0.0%	~

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).
Senesys.	Genesys Skills Assessor
Hello, Gerry Cafolla	Logout
My Development Reports Manage Groups & Users System Settings Manage Assessments My Development Reports 🔘	Add stuff
Admin Reports User Frides	🖌 Options 🛸 Refresh 🔇
Add Remove	
Test Result Filters:	
	≡
Add Remove	
Save Filters	
Select a report from the lift Question Response Summary 🛛 🔽 Create report	~

enesys [.]			Genesys Skills Assesso
Hello, Gerry Cafolla			Logour
My Development Reports Manage Gro	ups & Users System Settings Manage Assessmer	nts My Development Reports 💿	Add stuff
Admin Reports			🧨 Options 🛸 Refresh 🧕
Filter Question Response Summary			
Filters applied to this report			
		Test Result Filters:	
No filter was applied.		No filter was applied.	
Select an assessment from the list to see the report	Select an assessment - Select an assessment - Annual Feedback Review from Agents Blackherry Support Blackherry Support Bredback Assessment to Test Feedback Models General General General For-Test V2 Health Care Phone Support Insurance Knowledge July Management Capability Program Latest Product Launch - Support Information Mobilephone Consumer Sales New Product Qui NtS Mental Health Disorders Safety Rating of New Cars Safety Rating of New Cars Safety Rating of New Cars Supplus House TV Deals Working with the local labour market		

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G	enesys			Genesys Skills Asses
ello,	Gerry Cafolla			Lo
My D	evelopment Reports Manage Groups & Users System Settings Manage Assessments N	1y Development Rep	orts 🛛 🤇	bbA 😧
dmin I	Reports			🖌 Options 🤹 Refrest
Filter:	g Question Response Summary 😆			
	rs applied to this report filters: Test Besult			=
	ilters: Test Result ter was applied. No filter wa			
o.l	an assessment from the list to see the report. Mobilephone Consumer Sales			
Select	An assessment nom die nist to see die report. Moonephone consumer sales Mobile Phones			
20	are the pay-monthly tariffs for Sim-only plans?		25.0%	
20	12 month plan	2	62.5%	(1)
0	3 month plan	4	50.0%	- 🦰
0	5 month plan	3	37.5%	- Part Right
				87.50% (7)
8 user(:	s)	I		
Whic	h of these Mobile Phones are exclusive to TP?			
80		4	50.0%	Witning 60,00 % 44 Flight 50,00 %
				(4) 00.00%

Admin Report User Filter – Hierarchy

You can now use the organisational hierarchy as a filter within the Admin report. Simply select the 'Add Filter' button under the 'Edit User Filter' section of the 'Admin Reports' widget.

Admin Reports		🦸 Options 🛱 Refresh
Filters		
User Filters:	Edit User Filter:	
<empty criteria=""></empty>	Select a filter type from the list and click Add Fleer. Hierarchy 🔽 🖓 dd filter	
	Save Cancel	
Add Temove		
Test Result Filters:		
Test result inters.		
Add		
Save Filters		

Wrong 50.00 % (4)

50.0%

4

All 100 50.00% (4)

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

Filters	
User Filters: <empty criteria=""></empty>	Edit User Filter: Select a filter type from the list and click Add Filter: Hierarchy 💌 Add filter
Add Remove Add Remove Test Result Filters: Add	Select a litter type from the list and click Add Hitter: Hierarchy Add Inter Team Leader down i
Save Filters	

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 now included within the User Result Detail Report

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

Employee ID	First Name	Last Name	Date Completed	Duration	Overall result
Average (1 users):		00101112	92.86%		
TestAgent03	TestAgent03	TestAgent03	18-Aug-2011 10:42	00:01:15	92.86%

Feedback Deployment Models

This widget 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.

Hello, System Administrator	
System Admin Manage Users Reports Mana	age Assessments
Feedback Deployment Models	
Self only : Self	
Self and Manager : Self, Manager	
	🛱 Assessment Builder 🛛 🗙
	Test Properties Basic Advanced
	Assessment Code: Number of questions to choose for test 100 🗘
	Question order in order within content 🔹 Introductory Text
Add	
	Pass mark 80 ÷
	Create a bertificate on test pass? [No certificate selected] • Are answer subtle after a Test? Can users freely navigate through the test?
	Is this test med?
	Is this a Feedback Only assessment? If I the set of the
	[Save changes]

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.

System Admin Manage Users Reports N	Manage Assessments My Development Skillsroute Skillsanalysis 🜍
edback Deployment Models	
elf only : Self elf and Manager : Self, Monager	Name: Self Manager Report Peer Save

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

Hello, System Administrator	
System Admin Manage Users Reports Manage Asses	sments My Development Skillsroute Skillsanalysis 🔇
Feedback Deployment Models	
Self and Manager : Self, Manager	Genesys Skills Assessor

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

Enter the number of Reports and click on 'OK'.

System Admin Manage Users Reports A	Manage Assessments My Development	Skillsroute Skillsanalysi	s 🛛 🛈 🕽
Feedback Deployment Models			
Self only : Self Self and Manager : Self, Monoger	Feedback	that are needed	

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.

Hello, System Administrator System Admin Manage Users Reports Manage Assee	ssments My Developn	nent Skillsroute	Skillsanalysis 🛛 🔇
Feedback Deployment Models		\ 	
Self only : Self Self and Manager : Self, Manager	Self Report(2)	Manager Peer	

Reset Tests

To reset assessments, select the 'Reset Tests' widget. The individual Groups will be listed down the left hand side. Any assessments taken within the date range will be presented in the box underneath the date range window.

Reset Tests	🖌 Options 🋱 Refresh 🔇	
Select a group from the list then tick of the selected assessments for the sel	one or more assessments. Any users who have tests that can be reset within the selected date range will appear on the right; select the ones to reset and click the button to reset ected users.	
Reset selected users	Voice	

After selecting an assessment any users that have completed the assessment within the date range will be presented in the third window under 'Select all'.

To reset an assessment either select and individual or 'Select all' and then click on 'Reset selected users'.

Any reset assessment will then appear in the users 'My Development' widget to be retaken.

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:-

 \checkmark GIS 7.5 & CME 7.5 on the server.

Select the Skillsroute Widget, as per the example below.



ystem Admin 🛛 Manage Users 🛛 Re Ny Development 👋 Reports 🖉 💭	ports Manage Assessments	My Development	Skillsroute Ski	llsanalysis SkillsDNA	SkillsDNA Admin	Change Font: A A A Add
sRoute						🧨 Options 🍄 Refres
Select File View Import						
Please enter the path to the file or click Br U:\Reference Guides\Ski Browse	owse to search for it					

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

The spread sheet 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 organisation as used within their routing strategies.

Employee ID	First Name	Last Name	User Name	Bronze	Silver		Gold
jhiggins	Joanne	Higgins	jhiggins		1	2	9
jparker	Jerry	Parker	jparker	2	2	3	3

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

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

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

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

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

elect File View	Import							
Sheet1 Sheet2	Sheet3							
User Name	Employee ID	First Name	Last Name	Billing	Sales	Service	e Su	
Jay	U_8306_Simulator	Amy	Jay	1	1	2	3	
afriio	afriio	Andrea	Friio	1	1	2	3	
asmith	asmith	Angela	Smith	1	1	2	3	
aosborn	aosborn	Ann	Osborn	1	1	2	3	
brigel	brigel	Barb	Rigel	1	1	2	3	
btamzarian	btamzarian	Barney	Tamzarian	1	1	2	3	
bcarlson	bcarlson	Brad	Carlson	2	1	2	3	
cspencer	cspencer	Carole	Spencer	2	1	2	3	
clee	clee	Charles	Lee	2	1	2	3	
		11						

o, System Administrator		Lo
stem Admin 🛛 Manage Users 🔹 Reports	Manage Assessments My Development Skillsroute Skillsanalysis SkillsDNA SkillsDNA Admin Change Font: A A	Add
Route	🛃 Options 🛱 i	Refres
Clear all Mappings		
Source Fields	User Field Mapping	
UserName	Source Field Destination Field	
EmployeeID	UserName	
FirstName	First Name	
LastName	Last Name	
Billing	EmployeeID	
Sales	Email Address	
Service	Tenant	
Support	Agent Login	i
	Persons Folder	
	Access Group	
	Agent Group	
	Skill Mappings	
	Source Field Set Description	
	No records to display.	

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

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.

Route				🖌 Options 🍄 Refre
		Email Address		options + nem
Sales		Tenant		
Service		Agent Login		
Support		Persons Folder		
		Access Group		
		Agent Group		
	Skill Mappings			
	Source Field	Set Description		
	Billing	Billing	-	
	Sales	Sales		
	Service	Service		
	Support	Support		

CME Authentication (Genesys environment only)

If Skills Assessor is being used within a Genesys environment there is the option to authenticate user access using 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 'Manage Systems Settings' widget within Skills Assessor and select the 'Field Mappings' tab.

This will display a screen similar to the example below:



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.



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 Widget for correlation analysis).

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

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

	А	В	С	D	E	F	G	н	L. L.	J	к	L	М	N
1 Fir	rstname	Surname	Employee number	Manager	Position	Region	Location	Team	Company	Date	Product Knowledge (Assessment)	Agent Attitude	Customer Info Fit	Identify Problem&Soln C
2 Tia	anni	Ayala	tayala	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	6	9	8
3 Lis	sa	Barnes	Ibarnes	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	3	7	5
4 Lo	nnie	Bruce	Ibruce	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	4	10	9
5 Sh	nane	Carlson	scarlson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	6	3	4
6 Br	'ian	Chen	bchen	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	6	1	1
7 Jo	hn	Cunningham	jcisco	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	10	9	8
8 Lo	uise	Cunningham	lcunningham	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	1	10	10
9 Lu	is	Davenport	Idavenport	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	10	1	1
10 Lil	llian	Davies	Idavies	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	3	7	9
11 He	enry	Dunn	hdunn	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	7	4	3
12 Lo	rraine	Ellison	lellison	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	1	3	6
13 Ar	ndrew	Faust	afaust	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	2	5	2
14 La	rry	Finn	lfinn	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	10	6
15 M	ary	Gail	mgail	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	2	5	8
16 Ed	luardo	Garcia	egarcia	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	5	4	5
17 St	an	Goldman	sgoldman	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1	7	6
18 Lil	llie	Grant	Igrant	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	5	9	9
19 Ka	athy	Gurin	kgurin	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	6	8	9	9
20 Lo	retta	Hammond	Ihammind	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	10	5	4
21 LO	uise	Jacobs	ljacobs	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	5	7	9	6
22 Ar	my	Jay	ajay	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	2	1	4	3
23 Iai	n	Johnson	ijohnson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	7	1	4
24 Gu	urutej	Kaur	gkaur	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	3	6	7	6
25 Ar	nn	Larson	alarson	atalbot	Agent	Manchester	Deansgate	Team 1	My Company	01/11/2011	9	4	9	6
26 Ka	ai 👘	Lemieux	klemieux	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	4	3	9	6
27 Ki	m	Lewis	klewis	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	6	6	4	5
28 Be	en	Lin	blin	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	1	3	6	7
29 Pe	ele	Lolani	plolani	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	2	10	7	6
30 Re	ebecca	Lorraine	rlorraine	Ispencer	Agent	Manchester	Deansgate	Team 2	My Company	01/11/2011	9	9	8	6
31 Lis	sa	Low	llow	Ispencer		Manchester	Deansgate	Team 2	My Company	01/11/2011	3	7	7	6
32 Le	slie	Lyn	llyn	Ispencer	-	Manchester	Deansgate	Team 2	My Company	01/11/2011	s	4	9	8
4 + >	>> She	et1 Sheet2	Sheet3 2								I 4			▶ []

To import the data first select the 'Manage DNA Components' widget 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.



Once the component has been created it will appear in a list as per the example below.

o, demo demo				
	ge Users Reports	Analytics Routing DNA	A Admin 🗍 DNA 🕺 Reporting Admin 👋 Manage Assessments 👋 💭 🔄	Change Font: A A A
ge DNA Components				🕈 Options 🏛 Refree
anage DNA Compor	ients			
te and manage DNA Components				
KPIs				
late From: 09/06/2011	Date To: 10/06/2012	Refresh		
Description	Date created			
Agent Attitude	07/06/2012	Edit		
BBand Revenue	07/06/2012	Edit		
Customer Info Fit	07/06/2012	Edit		
Customer Understanding	07/06/2012	Edit		
FCR	07/05/2012	Edit		
identify Problem and Solution	07/05/2012	Edit		
Product Knowledge (Assessment)	07/05/2012	Edit		
Product Offering (Assessment)	07/05/2012	Edit		
Retention	07/05/2012	Edit		
reate Component				
care component				

Import KPI Data

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

Use this process to upload any new data.

Senesys:	Genesys Skills Assessor
Hello, demo demo	Logout
Administrator User Manage Users Reports Analytics Routing DNA Admin DNA Reporting Admin Manage Assessments 🔘	Change Font: A A A Add Stuff
Live imports Archived imports Mapping Templates	
Created Dire Created Dire demo demo 07/06/2012 15:09:25 Archive Delete	
Import New Data	

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

After selecting the required file click on 'Next'.

Senesys [.]		Genesys Skills Assessor
Hello, demo demo		Logout
Administrator User Manage Users Reports Analytics Routi Import KPI Data	ting DNA Admin DNA Reporting Admin Manage Assessments 🕼	Change Font: A A A Add Stuff Change Font: A A A Add Stuff Coptions 🛱 Refresh
Live imports Archived imports Mapping Templates Sectorsh		Î
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Import New Data Upload File Peace Identify key data Set up data mappings	envoyae to the file you wint to under	
Perform import		
•		J



Select the required sheet from the drop down box.

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

Senesys		Genesys Skills Assessor
Hello, demo demo		Logout
Administrator 🔨 User 🏹 Manage Users 🏹 Reports 🏹 Analyt	cs 🔨 Routing 👘 DNA Admin 🔪 DNA 🔨 Reporting Admin 🔨 Manage Assessments 🏹 🕡 🚬	Change Font: A A A Add Stuff
Line imports Archived imports Mapping Templates Created by Created User		
Linkad file		
Identify key data	Please select the sheet you wish to import from. Sheet1	
Set up data mappings Perform import	Please select the field which uniquely identifies the user as well as mapping it to the correct user field. Please Select www.unichmaps.top Please Select	
	Please select which field contains the date of the record. Please Select	
	Please select the type of data you wish to import.	
	Prevous Next	
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Select the correct fields from the drop down boxes. Click on 'Next' once completed.

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

Senesys				Genesys Skills Assesso
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Use imports Archived imports Constant by Constant Date Dentes dems 07/06/2012 13:09	Mapping Templates			
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Import New Cotte	Upload File Identify key data	Please select to load a previous mappin	g templates: Please Select 💌			
	Set up data mappings	Please select a source field				
	Perform Import	Product Knowledge (Assessment)	which maps to Product Knowledge (Asse	issment) 💌 Add mapping		
		Field Mappings				
		Source Field	Destination Field			
		Product Knowledge (Assessment)	Product Knowledge (Assessment)	Remove this mapping		
		Clear all Mappings Save Mapping	Previous Next			

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

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

Click on 'Next' to import the data once complete.

calhost needs some information	23			Genesys Skills	Assesso
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	name	and 'OK' to	save.		AAA Add 51
Une Imports Archived Imports Mapping Templates Created by Created Date Greated Date	Please select to load a previous mapping the select a source field				A.

Click on 'Start Import' to import the date.

Senesys:		Genesys Skills Assessor
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Administrator 🔪 User 🔪 Manage Users 🔪 Reports 🔪 Analytics Import KPI Data	Routing 🔰 ONA Admin 👘 DNA 🚏 Reporting Admin 🦷 Manage Assessments 🦷 💭 🔪	Change Font: A A A Add Stuff
Live imports Archived imports Mapping Templates		ń
Created by Created Date		
demo demo 07/06/2012 15:09		
Import New Data Upload File Identify key data	You are now ready to run the import, please click select an option:	
Set up data mappings	start import	
Perform import	Click on 'Start	
	Import'.	
		=
	Finiah	

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

Senesys [™]		Genesys Skills Assessor
Helio, demo demo		Logout
Administrator User Manage Users Reports Analytics	Routing DNA Admin DNA Reporting Admin Manage Assessments 🔘	Change Font: A A A Add Stuff
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Created by Created Date demo.demo.07/06/2012 15:09 & Genesys Skills Assessor		8
Indexed File		
Import New Data Identify key data	The import has finished. Click Finish to close the window.	
Set up data mappings	Item	
Perform import	The import completed successfully.	
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The data import will then show in the import log. This is where data previously imported can be deleted. Use the Archive option to archive any data no longer required.

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inistrator	User Manage Use	rs Report	ts Analytics Ro	DNA Admin DNA Reporting Admin Manage Assessments	Change Font: A A.
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rt New Data					

DNA User Field Mapping

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

Refresh the DNA users once these fields have been selected.

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Administrator User Market DNA User Finted Mapping	r Users 🕆 Reports 🗍 Analytics 🗍 Routing 🔹 DNA Almin 👘 DNA 🦄 Reporting Admin 👘 Manage Assessments 👘 💭 🔪	Orange Font: A A A Add Stoff Options = Refresh
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Refresh the	if required.	
DNA Users after		
the fields have		
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Manage DNA Blocks

DNA blocks are created in the 'Manage DNA Blocks' widget as per the example below.

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



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



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.



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

Senesys -	Genesys Skills Assessor
Hello, demo demo	Logout
Administrator \ User \ Manage Users \ Reports \ Analytics \ Bouring \ DNA Admin \ DNA \ Beporting Admin \ Manage Assessments Manage DNA Blocks	Change fors: A A A Add Stat
Step 1 Multiple DNA Step 2 -> Astrogen Agents to DNA Step 3 -> Astrogen DNA Step 3 -> Astroge	Centel View Full DNA

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

Senesys:	Genesys Skills Assessor
Hello, demo demo	Logout
Administrator User Manage Users Reports Analytics Routing DNA Reporting Admin Manage Assessments Image Assessments Manage UMA Blocks Step 1 -> Build/Loit DNA Step 2 -> Assign Agents to DNA Step 3 -> Refresh DNA Cube	Change Font: A A A Add Stuff Customs ^{ca} Refresh
Date From [94/06/2011] Pervious DNM [seles Agent] Duality Reension Reension Sates Agent Droadband Skill (\$ 376) Pervious DNM [\$ 395% \$] Sates Changes Care View Full DNM Care Quality (255% \$) Quality (255% \$)	

To create a job role, first create the DNA block and then click on 'Save'. The 'Save DNA Block' window will then be presented. Select 'Is Job Role' and give the job role a name. This job role will then be available to associate user to.

Senesys:		Genesys Skills Assessor
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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.

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age DNA Blocks	\ Manage Users \ Repo	rts Analytics Ro	outing 🛛 DNA Admin 👘 DNA Reporting Admin Manage Assessments 🖓	Change Font: A A A
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gents			Job roles:	
earch for user:			Job role	
	Only Unassigned agents		Sales Agent	
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lease select a Team :	All			
	Go (Agents Found 3)			
	_			
irst Name	Surname	Current Job role		
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After assigning users to roles, select the last tab and refresh the DNA Cube.

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Step 1 → Build/Kat DNA \Step 2 → Assign Agents to DNA life you have built a new DNA then click Run Cube Translation.	ń
Run Cube: Translation If you have just ADD and to a new DNA or moved them from a DNA then just click RUN THE CUBE.	
Click on 'Run	
07/06/2012 16 26 09 Last Cube Transier The Cube'.	
	÷

Your DNA Mapping

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

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Hierarchy Filters settings		
Company Region Company Region	Select the required	
Team Location Team	hierarchy view from	
	the user fields	
Move Up Move Down Remove	selected previously.	

View Filtered DNA

The 'View Filtered DNA' widget 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.

🥯 Genesys∙			Ger	nesys Skills Assessor
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Calculate By: Current Retrests			Total No of employees green: 36 Total No of employees red: 15 Total No of employees red: 15 Total No of employees: 96	
급 : Liverpool 회 Manchester	Creen 27.08%	Manchester		

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

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Calculate By: Current V Refresh				Total No of employees green: 13 Total No of employees amber:26 Total No of employees red: 9 Total No of employees: 48	
My Company Unexpool Cressington Park Merseyside Manchester	Cressington Park	Merseyside Amber 03575 03575 03575 03575 03575			

Select and individual user to reveal their DNA results.



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



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My Company Uverpool Cressington Park Green Sales Agent Green Green	Image: state of the state		Resolution	

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

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



Comparison view.



Top DNA Agents

The 'Top DNA Agents' widget is the report widget.

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.



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



Individual users can be also be selected.



Update Routing Skills from DNA

This widget enable 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 'Broadband Skill' DNA has been linked to 'Broadband' skill. To link drag and drop the individual components into the middle table.

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ate Routing Skills from DNA				🐔 Options 🛱 Refresh
				*
lease drag and drop DNAs and CMEs into the centre to link them.				
DNA's	Linked Skills	Update	CME Skills Refresh Skills	
DNA Name	DNA Name	Skill	Skill	
Quality	Broadband Skill	Broadband	AgentScripting_Refer	
Retention			Alcatel Avaya	
Revenue			Billing	
Sales Agent	_ ▲		Branch	
Broadband Skill			Broadband	
Back Office			BroadBankTalk	
			Building	
			BusinessBanking	
			BusinessContracts	
			Callback	E
			CallHandling	
			ChatSpeed	
			ClscoCM	
			ClaimEnguiriesOnLine	
			CollegeFund	
			CorporateSchemeMembers	
			CreditCard CreditCards	
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.

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		ChatSpeed	
		CiscoCM	
		ClaimEnguirlesOnLine	
		CollegeFund	
		CorporateSchemeMembers	
		CreditCard	
		CreditCards	



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

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ministrator User Manage Users	Reports Analytics Routing DN	A Admin DNA Reporting Admin	Manage Assessments	Change Font: A A A
te Routing Skills from DNA				🖌 Options 🇯 Refresh
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			BusinessContracts	
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			CharSpeed	
			CiscoCM	
			ClaimEnquiriesOnLine	
			CollegeFund	
			CorporateSchemeMembers CreditCard	
			creatuard	

SkillsAnalysis

The SkillsAnalysis widget works in three stages.

Stage 1, select the users and users are selected from the hierarchy. All users can be selected 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'.



Click on 'Choose items to Analyse' once the users have been selected.



Select which data to use for analysis.

Senesys:	Genesys Skills Assessor
Hello, demo demo	Logout Change Font: A A A Add Souff
Observation Concertents to Analysis Perform Analysis Analysis Result Saved items summary Toch one of motion can be left and click. Add to add them to to the list of heme to analyse. Ticking/unticking a box will affect all visible items that belong to it in the tree Image: New York If the motion can be left and click. Add to add them to to the list of heme to analyse. Ticking/unticking a box will affect all visible items that belong to it in the tree Image: New York If the motion can be represented in the tree on the left and click. And the items to the ite	

Click on 'Perform Analysis' to analyse the data.

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User Selection 🕆 Choose Items to Analyzis 🚺 Perform Analysis 🔪 Analyzis Result 🔨 Saved Items Summary	
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Progress 100% (8)	
· · · · · · · · · · · · · · · · · · ·	
Current Step: Building data set	
Elapsed Time 00:0005s	
e existing analysis session; new session ID is 3	
ata set NEW was not added, there were insufficient data points (0).	
ata set Test Assessment was not added, there were insufficient data points (0).	
ata set Agent Attitude added at 10-Jun-2012 11:06.	
ata set 88and Revenue added at 10-Jun-2012 11:06.	
ata set Customer Info Fit added at 10-Jun-2012 11:06.	
ata set Customer Understanding added at 10-Jun-2012 11:06.	
ata set FCR added at 10-Jun-2012 11:06.	
ata set Identify Problem and Solution added at 10-Jun-2012 11:06.	
ata set Product Knowledge (Assessment) added at 10-Jun-2012 11:06.	
ata set Product Offering (Assessment) added at 10-Jun-2012 11:06.	
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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.

Analysis			
			🛃 Options 🛱 Re
Iser Selection Choc	se Items to Analyze Perform Analysis Analysis Result Saved Ite	ems Summary	
Best Correlations list show	is the most highly correlated results. You can use the "Find correlation for" tab to	help you find potential training areas to improve any of your data sources. The Results Matrix shows	the complete results of the analysis in tabular form.
	ind Correlation For Results Matrix		
arrelation %	he best correlations for just the selected set Data Set 1	Data Set 2	Matches
0.06	Customer Understanding	Retention	96
9.00	Customer Understanding	FCR	96
7.25	Customer Understanding	Product Offering (Assessment)	96
7.18	Product Offering (Assessment)	Retention	96
5.87	FCR	Retention	96
6.50	FCR	Product Offering (Assessment)	96
9.61	BBand Revenue	Retention	96
8.47	6Band Revenue	FCR	96
6.75	BBand Revenue	Customer Understanding	96
6.55	BBand Revenue	Product Offering (Assessment)	96
5.80	Identify Problem and Solution	Retention	96
3.19	FCR	Identify Problem and Solution	96
2.86	Identify Problem and Solution	Product Offering (Assessment)	96
1.76	Customer Understanding	Identify Problem and Solution	96
9.35	BBand Revenue	Identify Problem and Solution	96
5.57	Customer Info Fit	FCR	96
3.57	Customer Info Fit	Customer Understanding	96
2.86	Customer Info Fit	Retention	96
0.78	Customer Info Fit	Identify Problem and Solution	96
7.67	Customer Info Fit	Product Offering (Assessment)	96

The 'Find Correlation For...' allows a specific data set to be selected to view the correlation results. Use the drop down box to select a specific data set to view.

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llo, demo demo			Log
dministrator 🔨 User 🔨 Manage Users 认 Reports 🗍 Analytics 认 Routing 📉 DNA Admin 🔨 🛙	NA Reporting Admin Manage Assessments 🛛 🕥 🔪		Change Font: A A A Ad
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e Best Correlations list shows the most highly correlated results. You can use the "Find correlation for" tab to help you find	I potential training areas to improve any of your data sources. The Results Matr	ix shows the complete results of the analysis in tabular fo	arm. 🔺
Best Correlations Find Correlation For Results Matrix			
hich analysis set do you want to find the best correlations for? BBand Revenue	Correlation %	Matches	
Analyzeo Data Retention	Correlation %	96	
CR	79.01%	96	
Customer Understanding	76.75%	96	
roduct Offering (Assessment)	76.55%	96	
dentify Problem and Solution	69.35%	96	
Dustomer Info Fit	57.35%	96	
Product Knowledge (Assessment)	-0.52%	96	
Agent Attitude	0.45%	96	

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

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

Analysis										🛃 Options 🛱 Re
((Perform Analysis	Analysis Result	Saved Items Su		ing aceas to improve	any of your data so	irres. The Results Matr	ix shows the complete	results of the analysis in tabular form.
	Correlation For	Results Matrix								
	Agent Attitude	68and Revenue	Customer Info Fit	Customer Understanding	FCR	Identify Problem and Solution	Product Knowledge (Assessment)	Product Offering (Assessment)	Retention	, in the second s
tent Attitude		0.45%	2.14%	5.87%	12.27%	11.49%	4.64%	6.80%	10.61%	E
and Revenue	0.45%		57.35%	76.75%	78.47%	69.35%	0.52%	76.55%	79.61%	
stomer info Fit	2.14%	57.35%		63.57%	65.57%	60.78%	3.68%	57.67%	62.86%	
stomer Understanding	5.87%	76.75%	63.57%		89.00%	71.76%	1.98%	87.25%	90.06%	

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.

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Hello, demo			Log
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Which analysis set do you want to find the best correlations for? BBand R	bvenue ·		2
(Anatyzen Daja)		Correlation N-	Watches
Retention		79.61%	96
PCI	6-1	78,47%	96 26
Click on the analysed data to select users for training.	Checks Statistics Accesses To be accessed as a select user for training using the correlation between the two markers indicates the range of users you, the side for arc to access the training using the correlation between the two markers indicates the inverse of user to be user to be user to be trained. The best of the side of	re going to train; Move the handles on results for users in Retention. The	The slider will suggest the number of users to be selected for training. Use the slide bar to change the numbers. It will automatically exclude the top 10%.

Once the users have been selected click on 'Save' to save that training plan and give the new plan a new name if required. Click on '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.

Genesys			Genesys Skills Ass
ilo, demo demo			
Administrator User Manage Users Reports	Inalytics Routing DNA Admin DNA Res	oorting Admin 🔰 Manage Assessments 💦 🥥)	Change Font: A A A
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e Best Correlations list shows the most highly correlated results. You ca	n use the "Find correlation for" talt to help you find potential train	ing areas to improve any of your data sources. The Results Matrix thows	the complete results of the analysis in tabular form.
Best Correlations Find Correlation For Results Matrix			
ich analysis set do you want to find the best correlations for? Band	Revenue 🔹		· · · · · · · · · · · · · · · · · · ·
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dention		79.61%	96
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Managing Learning Items

The 'Manage Learning Items' widget allows users to create various types of learning items and associate them with DNA components. There are four types of learning item: Assessment, Knowledge nudge, E-Learning URL and Free text.

The left side of the 'Manage Learning Items' widget contains the various controls for designing, assigning and viewing users' development plans. The list of existing learning items is located in the widget's main table. It is also possible to filter the display of learning items by different users and search for learning items via the controls in the top section of the widget.



To create a new learning item, click the 'Create Learning Item' link. You will then be asked to select the type of learning item that you wish to create.

🧮 Learning Item		X
Type:	Please Select Please Select Assessment Knowledge Nudge E-Learning URL Free text	

To set an assessment or knowledge nudge as a learning item you must first create the assessment or knowledge nudge via the 'Manage Assessments' or 'Manage Knowledge Nudges' widget first. It will

then be possible to create a new learning item and associate it with this assessment or knowledge nudge.

📄 Learning Item		×
Туре:	Knowledge Nudge	
Select Knowledge Nudge		
	Save Cancel	

The creation of an E-Learning URL knowledge nudge involves the setting of a title and E-Learning URL for the learning item. The E-Learning URL must use correct formatting, e.g. start with either 'http://' or 'https://'.

📄 Learning Item		×
Туре:	E-Learning URL	
Title		
E-Learning URL		
	Save Cancel	

To create a 'Free text' learning item, enter a Title and some associated text in the 'Free text' field.

🧮 Learning Item		×
Туре:	Free text	
Title		
Free text		
	Save Cancel	

Once you've created a learning item, you can associate it with DNA components by selecting it from the widget's main table and clicking the 'Links to DNA components' link. A new window will appear allowing you to select the type of DNA component you wish the learning item to be associated with (either assessment or KPI) via the tabs. Select the appropriate tab, identify the component you wish to use and click its 'Assign' link.

escription	Date created		
eedback	12/12/2012	Assign	
Quality	12/12/2012	Assign	
Revenue	12/12/2012	Assign	
Transactions	12/12/2012	Assign	
Fransfers	12/12/2012	Assign	

Once the learning item has been associated with a DNA component it will appear in the relevant users' 'My Development' widget. Taking the assessments or learning from the content of other learning item types will allow them to improve their DNA scores.