Skills Assessor 8.5.648

Administration Guide

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Each product has its own documentation for online viewing at the Genesys Documentation website.

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1 Logging In

Optimizer is accessed through a web browser, pointing at a site either either on the Internet (externally hosted) or over an internal company intranet (installed 'on-premise' at a site managed by the user's organisation).

Once the landing page is reached, a login screen similar to the one shown below will be displayed. (The application can be customized so that your organisation's branding standards, including logo and colour scheme, are used.)

Enter your unique user name and password, and click on the **Log In** button.

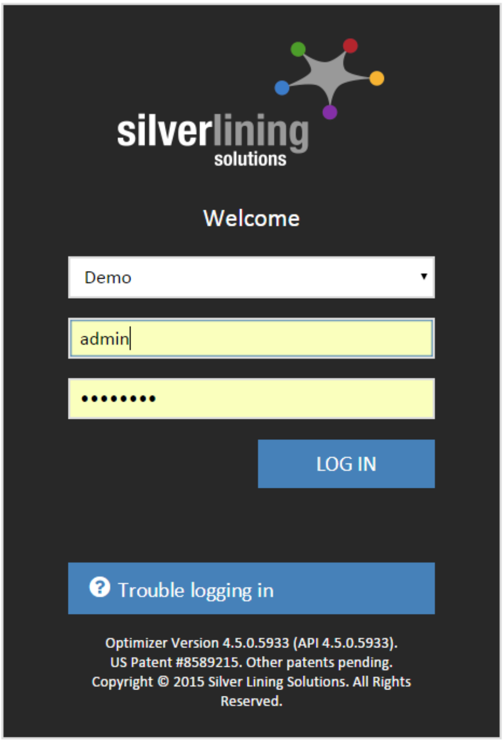


Figure 1: Log on screen

Note: depending on the configuration of the installation, login details may not need to be entered in order to access Optimizer (e.g., if Acitive Directory authentication has been enabled). Your trainer will guide you on the login rules for your organization.

A user logging in as an Administrator usually has full access to Optimizer. The home screen will look different depending on permissions assigned. A home page screen is shown below.

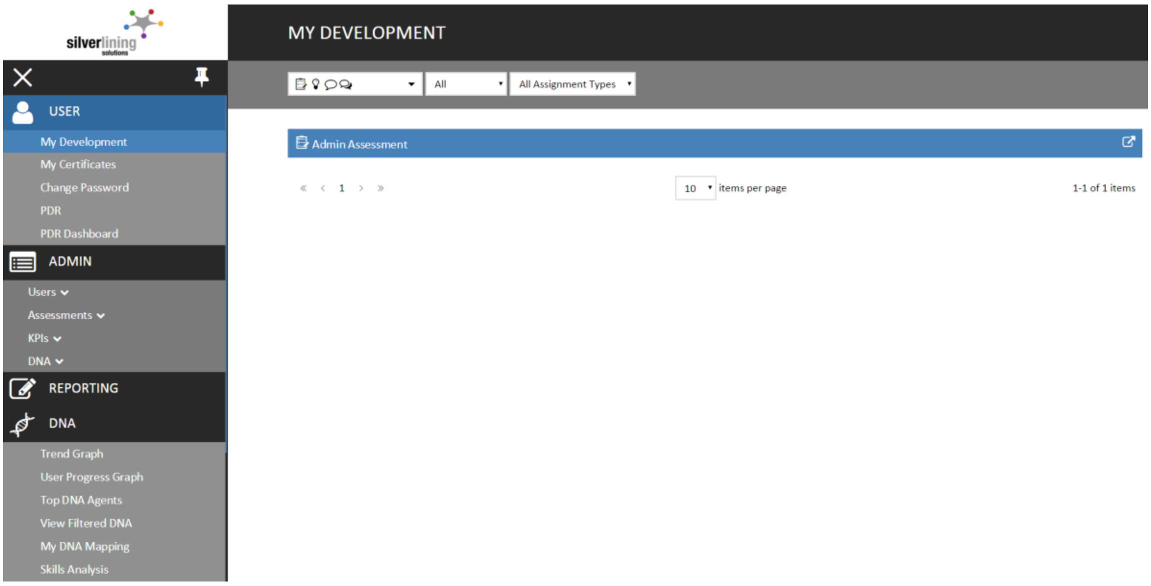


Figure 2: Optimizer Home Page

The left side of the screen always includes an expandable navigation menu. In the above example the My Development page is displayed (this will only be visible to users with the permissions to view the My Development page within Optimizer). The widgets displayed in the menu are based on the user's role as well as the available product licences.

2 Manage Hierarchy

The Users & Hierarchy page shows the organisational structure that has been set up within Optimizer. This hierarchy includes positions, users and the manager-subordinate relationships between individuals. Multiple users can be assigned to the same position.

Note: If the hierarchy will be managed and maintained by importing data or through integration with an existing HR system, the following section can be skipped as any manual changes made to the hierarchy will be lost the next time that the hierarchy is refreshed.

2.1 Managing Organisational Structure in Optimizer

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

Positions are created and inserted into the hierarchy by right clicking and creating a new position and dragging it under the existing position in the hierarchy.

Note: The top position in the hierarchy cannot be deleted.

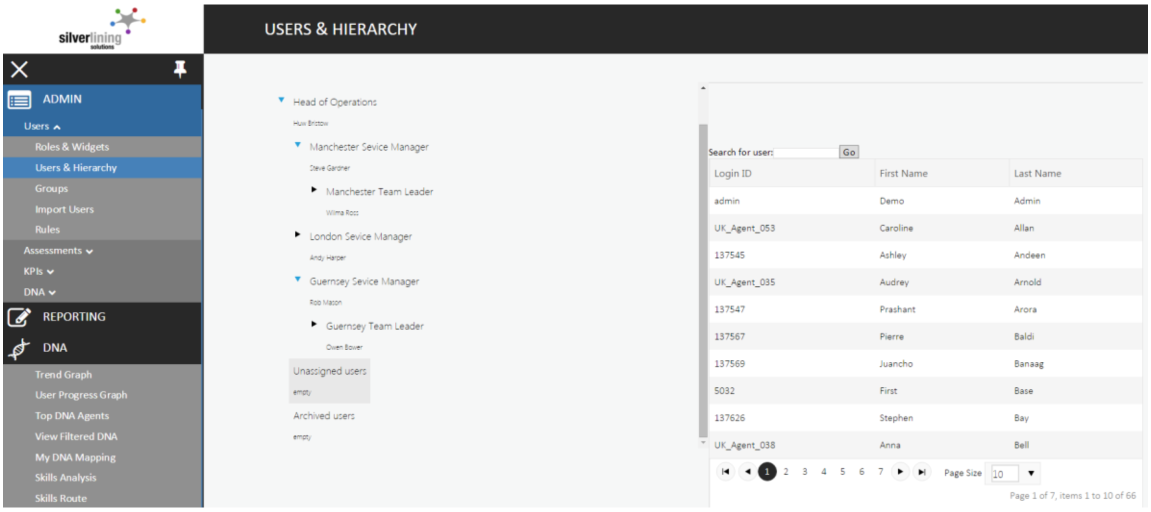


Figure 3: Hierarchy Management

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

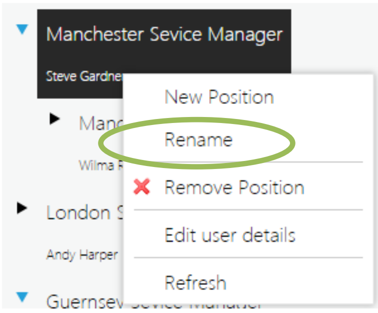


Figure 4: Creating a new position

The position will then appear in the hierarchy.

Right click on the new position to give it a unique name by clicking on the **Rename** option.

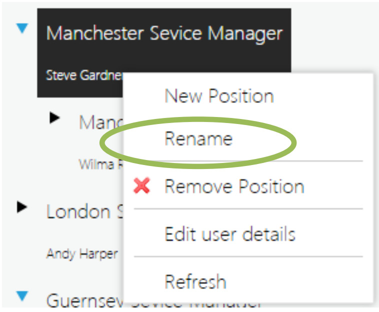


Figure 5: Renaming a position

To assign a user to the new position first highlight the position. Next right click on the user and select **Add Selected User**. This will assign the individual to the new position.

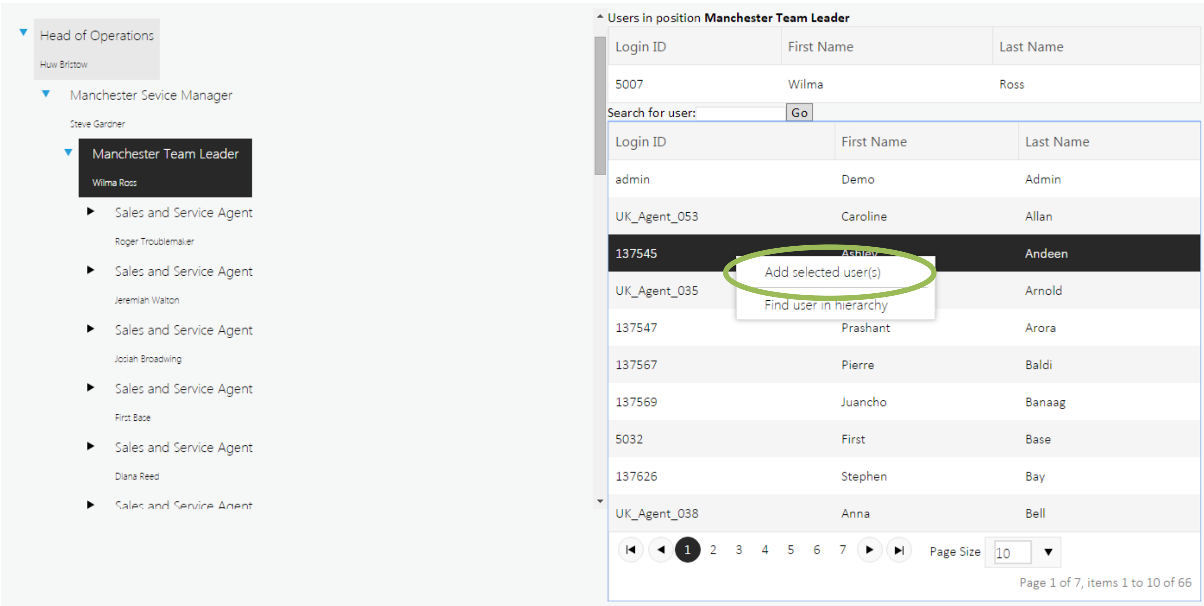


Figure 6: Assigning a user to a position

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

To manually maintain the hierarchy:

Create new users manually (see next page for instructions) and then assign them to the relevant position.

Amend any position changes manually and then the users assigned to the positions.

See Hierarchy Import Functionality for information on how to maintain the hierarchy by importing hierarchy data from a file.

3 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. To create a new user to assign to a new position, first create the new position and then right click and select **Edit user details**. This will allow you to create a new user and automatically assign them to the position.

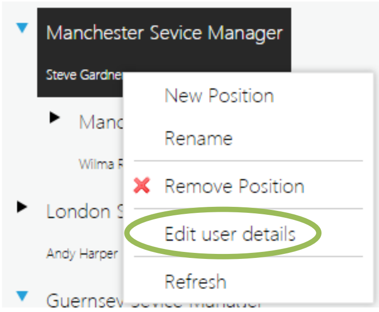


Figure 7: Assigning a user to a position by editing user details

To create a new user to assign to an existing position, first right click on the position you wish to assign the user to, and select **Edit user details**.

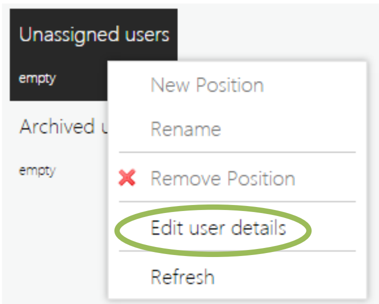


Figure 8: Creating new unassigned users

Click on **Create New User**.

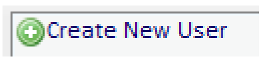


Figure 9: Creating a new user

A template will be presented similar to the example below (the field names will vary based on your organisation's field names).

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

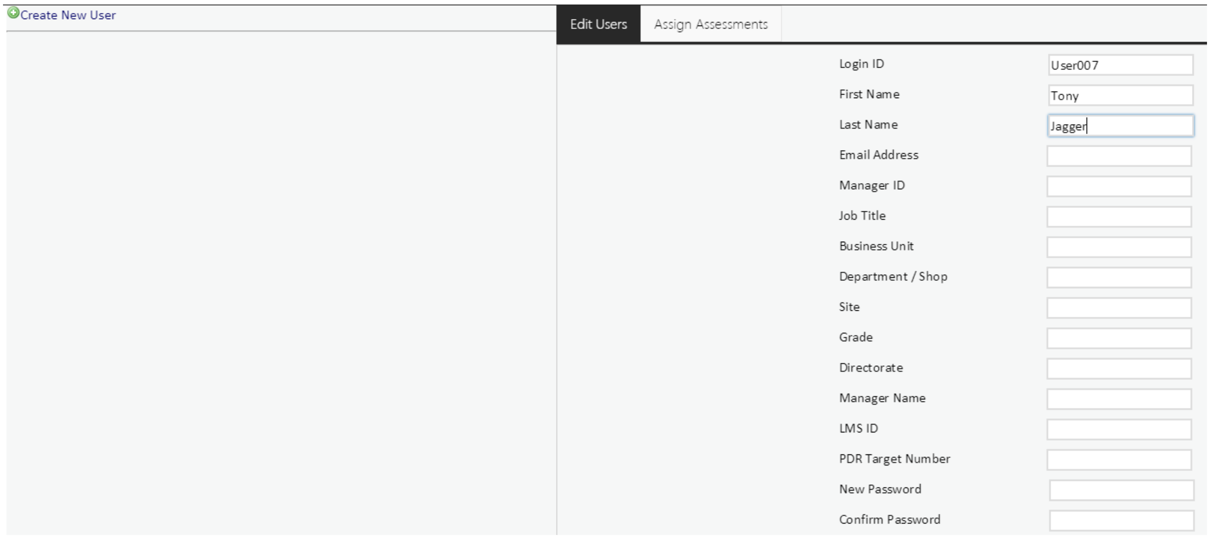


Figure 10: Entering new user details

The newly created user will then be assigned to the position.

4 Hierarchy Import Functionality

Organizations can import their organisational hierarchy directly into Optimizer using the **Import Users** page.

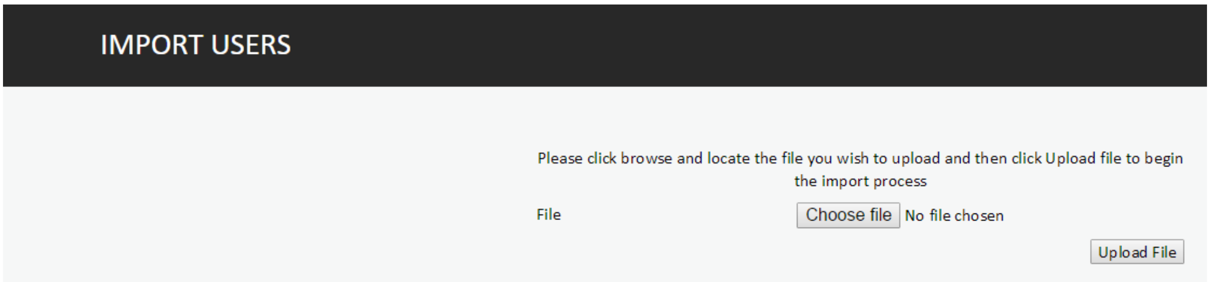


Figure 11: Import Users page

First, select the file that contains your Hierarchy information. This should be a .CSV file.

The following example hierarchy includes KPI data for use in correlation analysis and DNA (discussed later in this document). Including this data as part of the hierarchy import will not cause any issues.

In this example, Tony Price is the manager at the top level.

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

Figure 12: Importing users from spreadsheet or CSV file

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

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

Notes:

- If you are managing Planner users through Optimizer, ensure that you have first created and mapped the Portal Employee ID Field and Portal Username Field mappings in Optimizer -> System Settings -> General Settings tab.
- Portal users may only have one Portal role at a time. Users who have been assigned to the Portal Trainer role cannot become Portal Managers and vice versa.
- Users who have the Portal administrator role and any other Portal role will be treated as Portal administrators only.

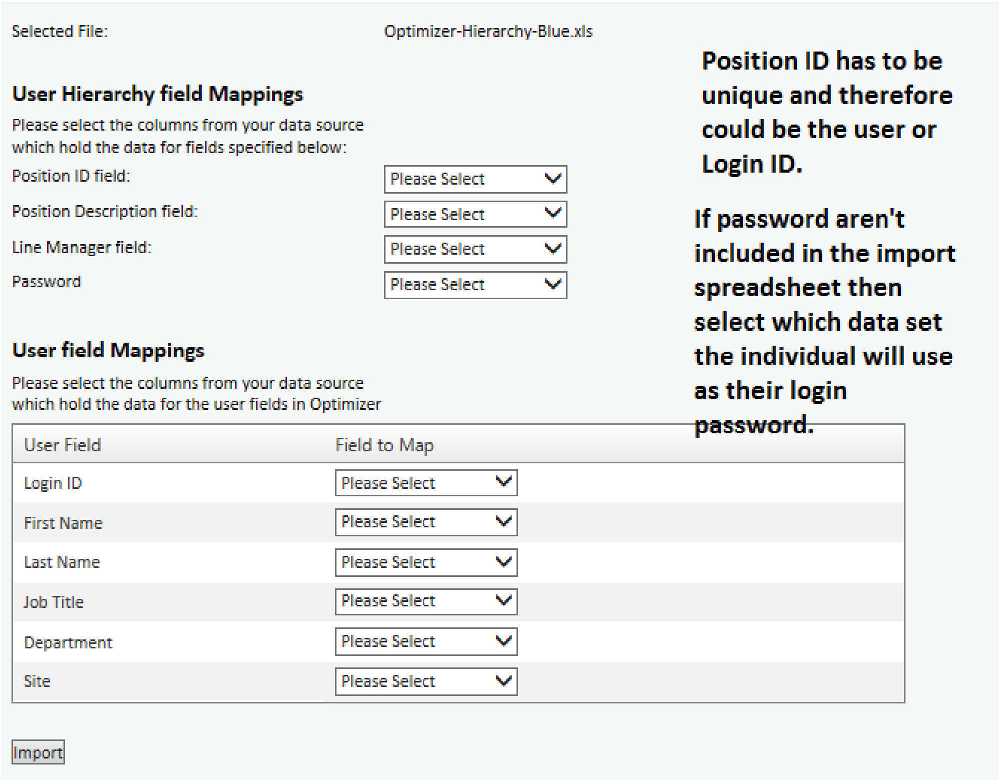


Figure 13: Mapping user position fields

Once selections are completed, click the **import** button to begin the import process (progress can be monitored).Once the file import process has been completed, the status will change to Complete. The hierarchy and user data can now be viewed within the **Users & Hierarchy** page.

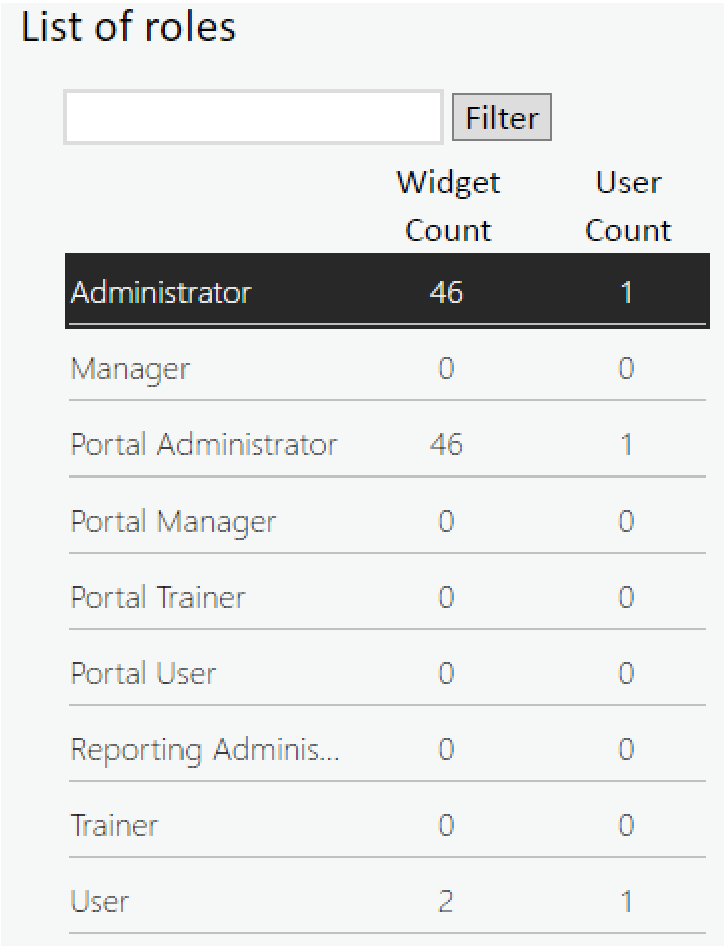
Note: As part of the import process individuals will automatically be assigned to User Roles (see Roles & Widgets). Any individual who has a subordinate will also be assigned to a Manager Role.

5 Managing User Permissions

User permissions – which features, functionality, and areas of the system a user has access to are defined in the **Roles & Widgets** page.

In the following example there are five default Optimizer Roles and four default Portal roles (Note: if the hierarchy is maintained via the import hierarchy feature, all users with subordinates will automatically be assigned to both the Manager and User Roles). The Portal roles will only appear if you have set up both products and the host name for Optimizer and Planner match.

The number of users and widgets (features and pages accessible to a role) associated to the Role is visible under **User Count** and **Widget Count**.


List of roles

Filter

	Widget Count	User Count
Administrator	46	1
Manager	0	0
Portal Administrator	46	1
Portal Manager	0	0
Portal Trainer	0	0
Portal User	0	0
Reporting Adminis...	0	0
Trainer	0	0
User	2	1

Figure 14: Managing user permissions

6 Defining and Managing Roles

The following section demonstrates how to create and manage a role. The Manager role is used as an example.

First, select a Role by clicking on the name of the role to view the list of users in the role.

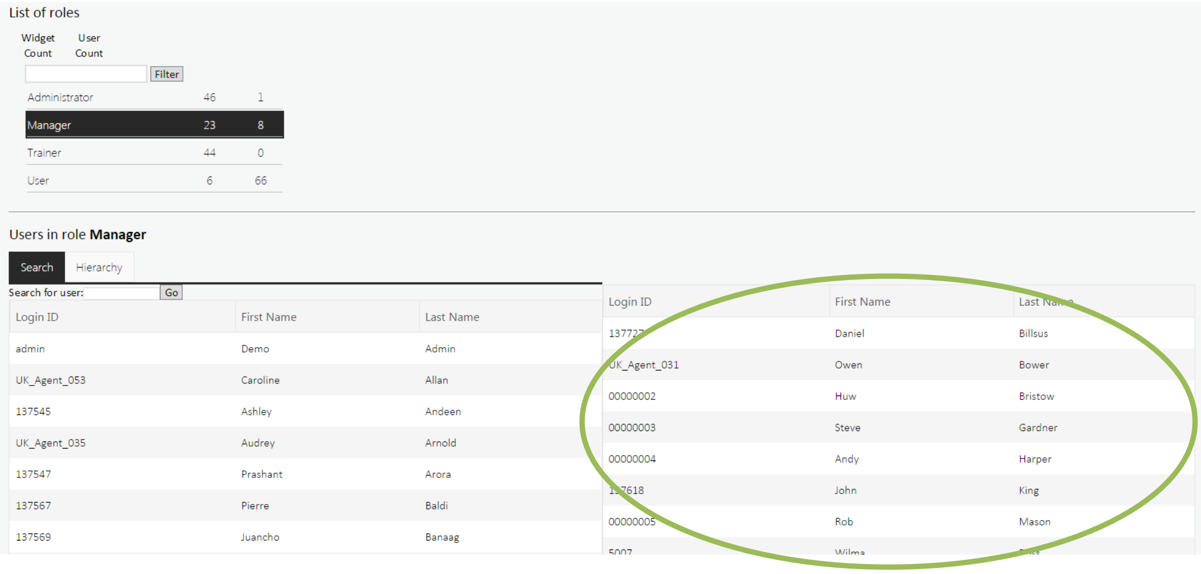


Figure 15: Viewing users with a specific role

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

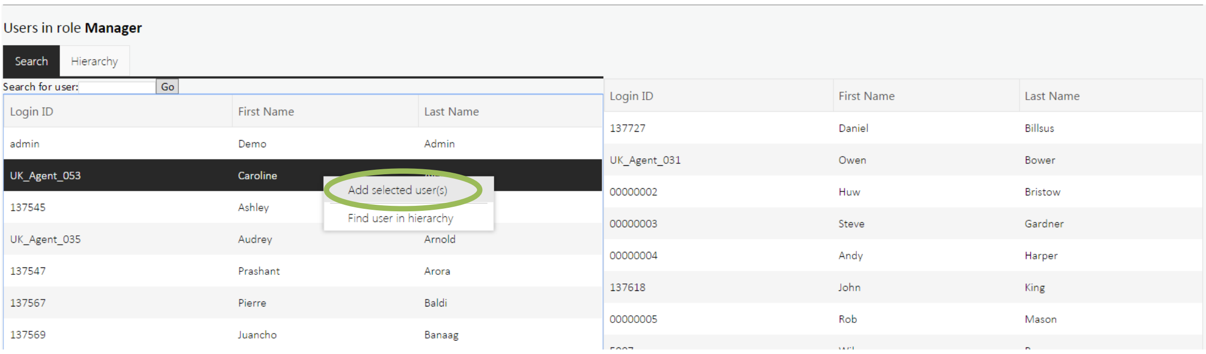


Figure 16: Assigning additional users to a role

There is also a search utility to quickly select the individual rather than manually scrolling to select users.

To use the search utility, select **Search**, enter the First Name, Last Name, or LoginID of the individual to be selected in the search box, and then click on **Go**.

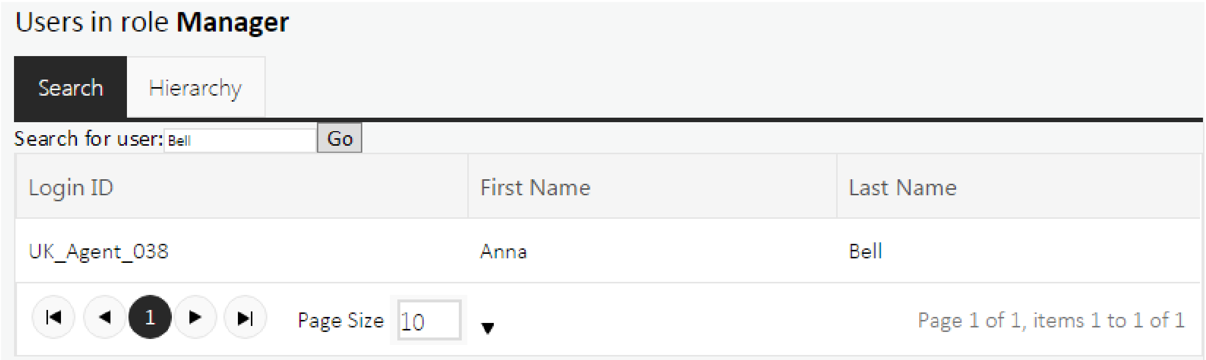


Figure 17: Searching for users

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

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

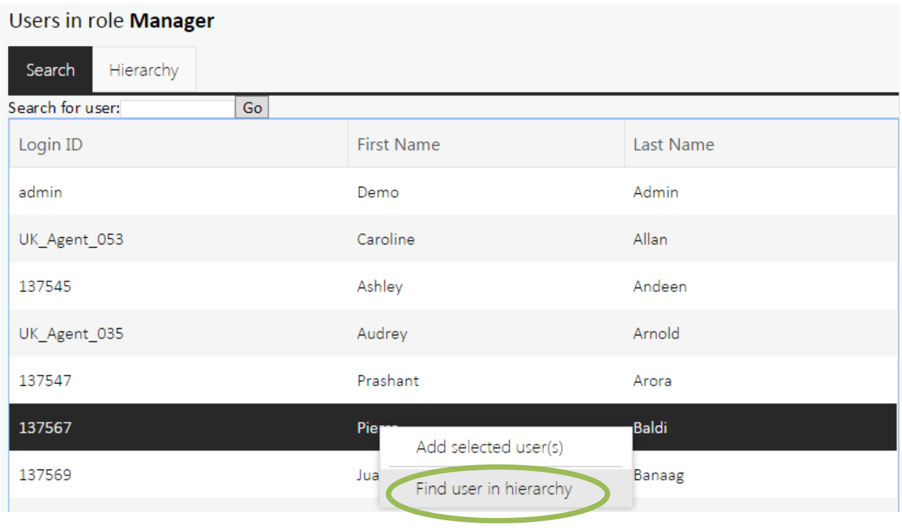


Figure 18: Finding a user in the hierarchy

The User name and Position will be visible in the bottom right hand side window, as shown in the following example.

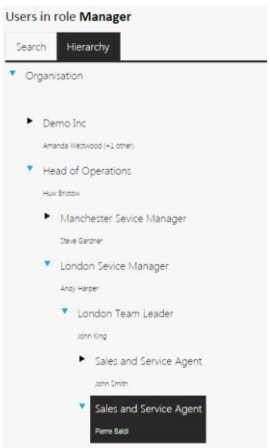


Figure 19: Search results

The roles and widgets page is also used for managing Portal users and their roles. There are four inbuilt Portal roles: Portal Administrator, Portal Manager, Portal Trainer and Portal User. Adding users to these roles will grant them access to the related Portal features. Their position in the hierarchy is also used for Portal Managers to see their Portal Agents.

Note:

- Portal users may only have one Portal role at a time. Users who have been assigned to the Portal Trainer role cannot become Portal Managers and vice versa.
- Users who have the Portal administrator role and any other Portal role will be treated as Portal administrators only.
- Any changes to Locations in Planner will be overwritten using the locations setup in Optimizer.
- Changing a user’s role from Portal Trainer to Portal Manager (and vice versa) is not supported. Changing a user’s role in this way will result in Optimizer temporarily displaying that the change has been successful, however, the role change has not been saved.

7 Creating Templates Associated to Roles

To create a template for individual Roles you first need to understand which Pages are potentially available for the user to access, and their associated features and functions:

7.1 Pages

The following pages are available:

- **About** – Displays the about screen for the application, information such as application version, etc.
- **Admin Reports** – The 3 standard administrator reports installed by default are the following:
    - **User Result Detail** – User assessment results, with ability to drill down to question level and the option to export the data.
    - **User Feedback Response Percentages** – User feedback response results, reported as the percentage of users who selected specific responses.
    - **Question Response Summary** – Overall summary, by assessment, at question or criteria level, or percentage of users who selected specific answers or ratings
- **Branding** – Application branding settings, including colour scheme, font size and logo.
- **User Field Mapping** – Control which user fields can be used for filtering DNA data.
- **Feedback Deployment Model** – Feedback model management – controls who is able to access a user's feedback assessment, for example, **Self & Manager**, **Self, Manager & Peers** etc. 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 next user in the **model** such as manager or peer.
- **Feedback Results Report** – Individuals or combination, (e.g. manager and individual/self) ratings by specific/selected criteria.
- **Import Users** – Import user details and Hierarchy.
- **Manage KPI Data** –Manage KPI data to be used within DNA and SkillsAnalysis.
- **Job Role Mapping** – Assign employees to DNA Job Roles.
- **Knowledge Nudge Report** –Knowledge Nudges time and usage results – when, and how long, a user accessed a knowledge nudge. Knowledge nudges are reading material or other information associated with specific assessments. A user may have access to the knowledge nudge prior to taking the assessment.
- **Licensing** – Optimizer license information, including the number of licences and expiry date.
- **Assessments** – Create, modify, import, export and assign assessments.
- **Certificates** – Create certificates to associate with assessments.
- **Blocks** – Create and edit DNA blocks (combinations of measurable metrics within a job role), representing Job Roles and/or components of those roles.
- **Components** – Create and manage DNA Components (KPIs and assessment scores that are part of a DNA Block).
- **Groups** – Groups of users that are assigned specific assessments.
- **Roles and Widgets** – Define permissions and system feature/function access for users.
- **System Settings** – Create user fields and field mappings (including login field) for all users.

- **Users & Hierarchy** – Organisational structure and user data. The hierarchy defines used to define the structure within the organization e.g. positions and associated users. The hierarchy defines reporting visibility, i.e. which users are able to see which other users in reports.
- **My Development** – Employee visibility and access to any assigned assessments.
- **Reset Tests** – Reset User Tests.
- **Skills Analysis** –Correlation analysis of KPI data and assessment results used to identify the skills that are driving performance.
- **SkillsRoute** – Updates employee skills and associated skills data in Genesys via excel spreadsheet file transfer.
- **Top DNA Agents** – View employee performance rankings and compare employee performance across an organisation or at other levels as selected/desired.
- **Update Routing Skills** – Link routing Skills to DNA, to allow updating of Skill data from Optimizer to Genesys.
- **DNA Cube** – Process and update DNA data when changes are made to DNA blocks and/or associated components.
- **User Results Report** – User assessment results at individual or manager level, for individual, team, group, site or other filtered criteria. Note: Non-managers can only view their own user results.
- **View Filtered DNA** – View DNA across your organisation, filtered in various ways.
- **My Certificates** – View and print individual completed certificates.
- **My DNA Mapping** – Show the DNA mappings for the selected user.
- **Messaging Log** – Show logs produced by the Optimizer Email Notification Service
- **Trend Graph** – Show changes in individual/team DNA data over selected date range.
- **Change Password** – Change password
- **Learning Items** – Create, edit, and link Learning items to DNA components
- **Manage Import templates** – Manage the list of import templates used for importing KPI data
- **Manage Knowledge Nudges** – Create and manage Knowledge Nudges. Knowledge Nudges are reading material or other information associated with specific assessments. A user may have access to the Knowledge Nudge prior to taking the assessment.
- **Manage Reports** – Upload, edit and delete Crystal reports
- **Report Categories** – Manage Crystal report categories
- **User Selections** – Manage DNA User Selections that can be used in other pages, e.g. The Trend Graph
- **View Reports** – View Crystal reports

Portal widgets may also be available if you have applied a Portal licence.

Once you have identified which pages are required to be accessed for which role, they can then be associated to that role.
To associate pages to a role, first select the role from the **List of roles** and then click on the **Widgets** tab in the selection box (Widgets are the Page names).

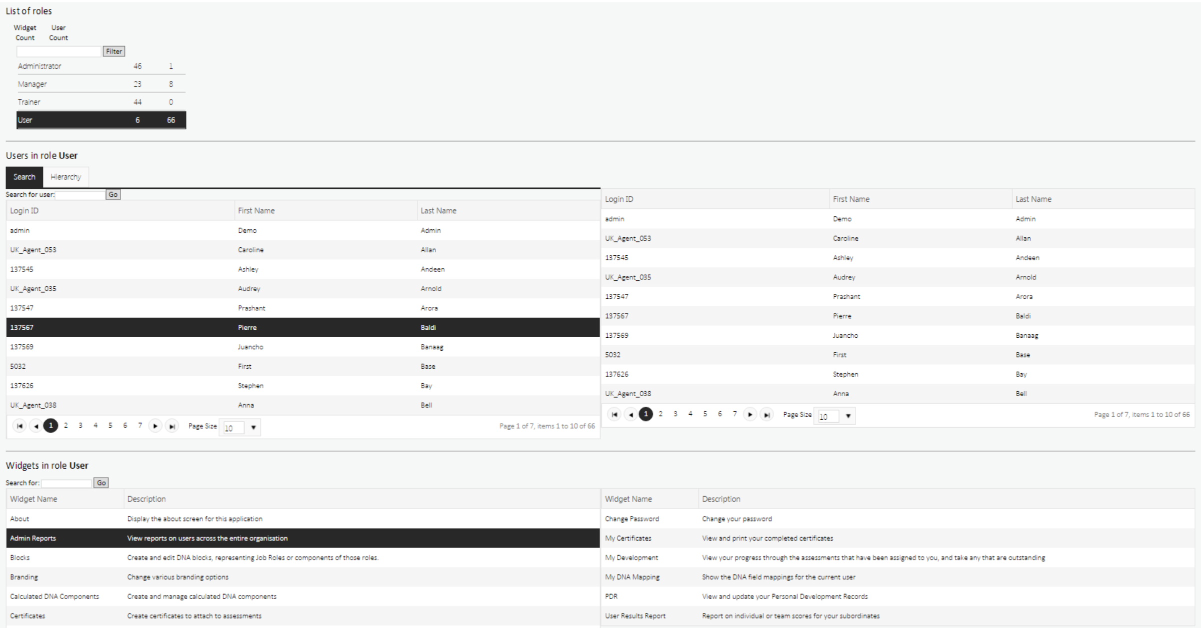


Figure 20: Associating a widget with a role

Right click on the required widget and select **Add to role**.
Users can create their own tabs and associate the widgets, or create pre-defined templates by role (see next section).

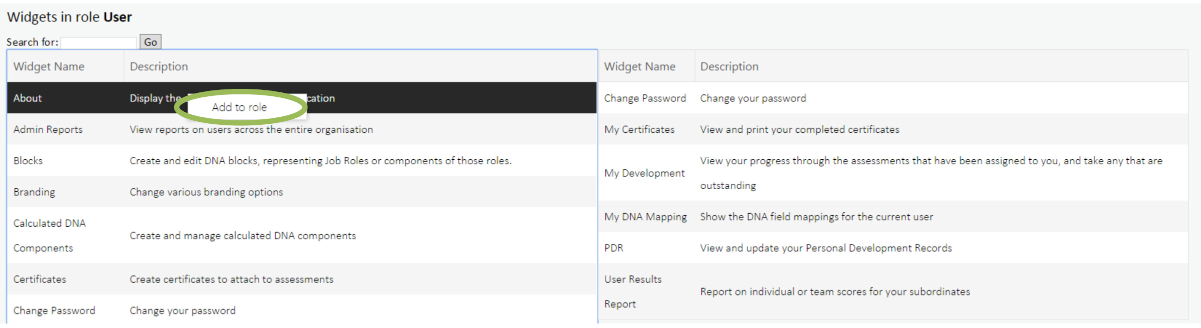


Figure 21: Creating tabs and associating widgets

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

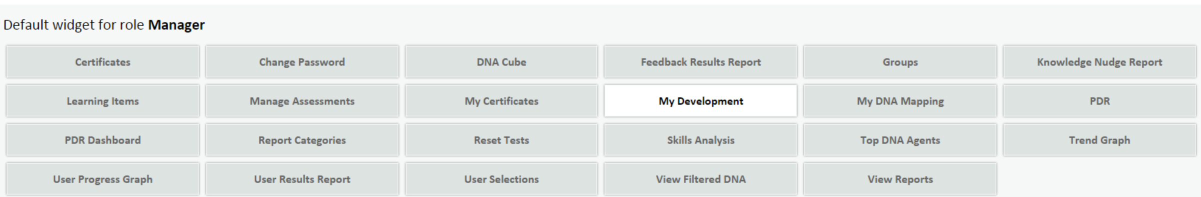


Figure 22: Setting the default widget for a role

8 Create New Roles

To create a new Role, right click on an existing role and select **New Role**. There is also the option to **Rename** the role or **Remove the Role**.
Once the new Role has been created, users and widgets can then be associated and a template containing the pages can be created.

Note: Trainers must be assigned to the trainer role so that they are listed in the assessment trainer selection screen.

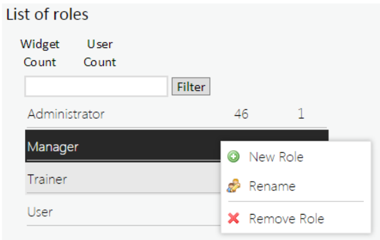


Figure 23: Managing roles

9 System Settings

The **User Fields**, **Field Mappings** and customized **Widgets** are found on the **System Settings** page.

9.1 User Fields

The user fields are the fields which contain the mandatory Login ID, Last Name & First Name along with any other required or desired user information that can be used for filtering and viewing report and DNA data.

The LoginID (or whichever user field is being used for authentication) must be unique to the user.

Additional user fields can be added by entering the desired field name and clicking the '+' icon.

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

If you wish to manage Planner/Portal users via Optimizer, create a Portal Employee ID and Portal Username user field to support Optimizer-Planner user mapping and specify this mapping in the General Settings tab (by specifying the appropriate field for the Portal Employee ID Field, Portal Username Field and Locations field options).

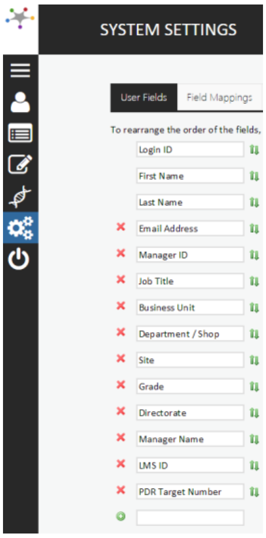


Figure 24: Adding additional user fields

9.2 Field Mappings

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

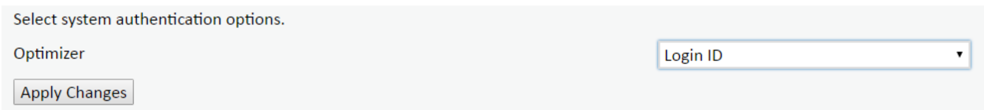


Figure 25: User login credentials

9.3 Widgets

The Widgets tab allows for external widgets (pages) to be accessed through Optimizer. Enter the required information and the relevant URL to be able to access them.

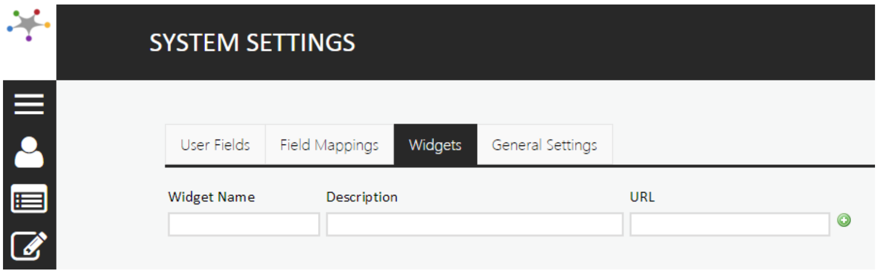


Figure 26: Widgets tab and external widgets

9.4 General Settings

The following additional settings are configured in the **General Settings** tab:

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

AICC – Used only when integrating with a third-party LMS (Learning Management System)

CSV Extension – Specifies which extension should be used for exporting data to a file.

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

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

Assessment Defaults – Note: leave this selected as default.

Combined tests require signing with a password – Requires password input as part of completion of a combined manager/user feedback assessment that requires agreement between the two parties.

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

Email Field – select the relevant email field.

User Field for PDR target counts – the user field used to store the number of possible targets for users' PDR.

Reporting API Identifying User Field – The user field to identify an optimizer user when using the Reporting API.

Portal Employee ID Field – The user field that is used to store Portal Employee IDs. This field must be set and all values must be unique to support Optimizer-Planner user integration.

Portal Username Field – The user field that is used to store Portal usernames. This field must be set and all values must be unique to support Optimizer-Planner user integration.

Locations Field – The user field that will hold Portal Manager and Trainer Locations. The locations can be delimited by using the character below.

Locations Field Delimiter – The single character delimiter used for the locations field.

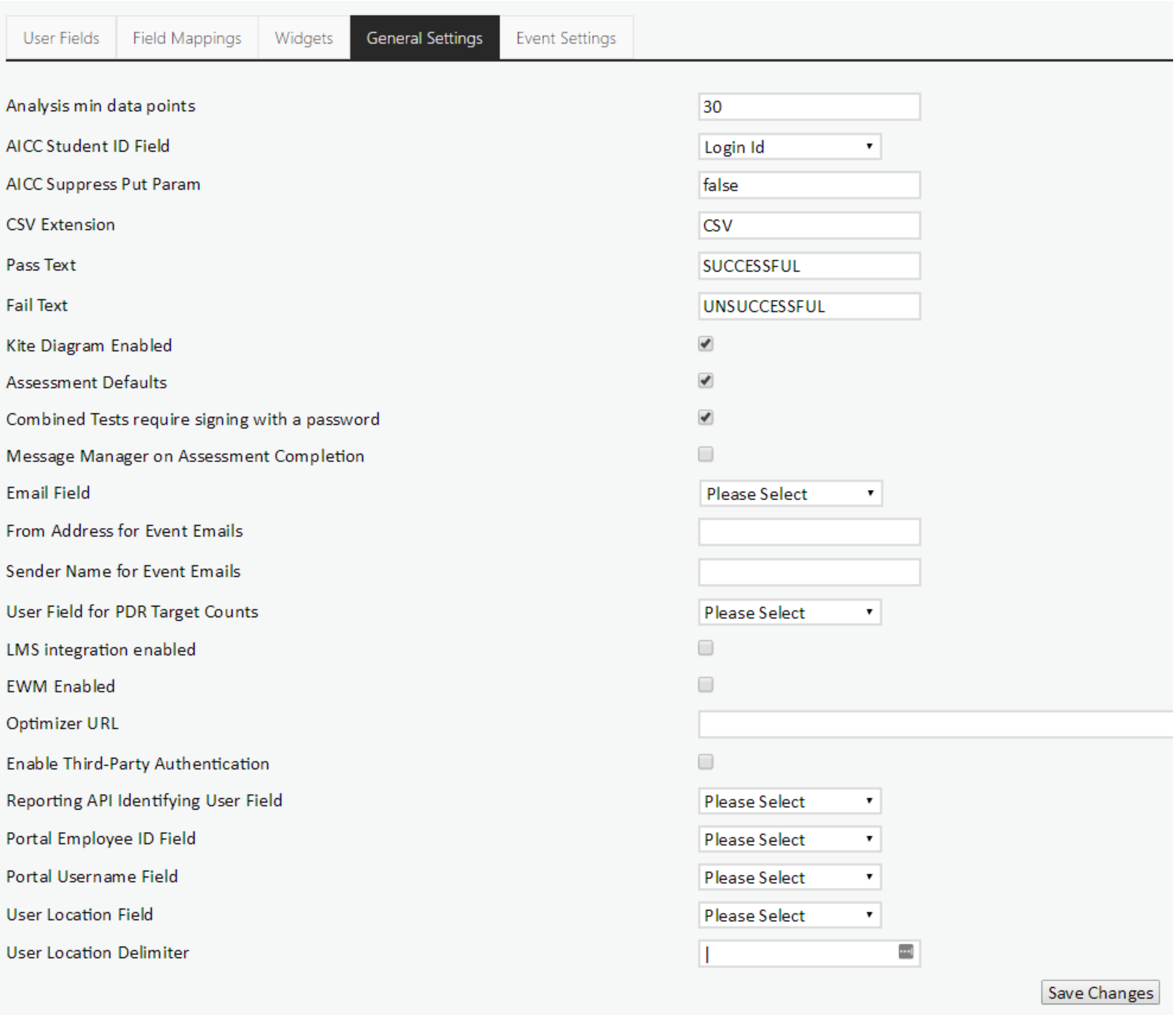


Figure 27: General Settings

9.4.1 Learning Management System Integration

If you wish to enable LMS integration, tick the **LMS Integration enabled** option. After checking this option, the following additional configuration fields will be available:

LMS Type – Select the required Learning Management System from the dropdown list.

LMS Url – Enter the full Url, including http:// or https://, of the LMS.

LMS Employee ID – for Moodle / ScofoldLMS based solutions enter the Webservice Token.

LMS UserID Filed – Select the Optimizer user field that contains the User’s LMS UserID.

LMS Proxy Server – Enter the full Url, including port number, for the LMS proxy server. For example, *http://lmsproxy.domain.com:1234* or *https://192.168.123.45:7890*

LMS Proxy User Name – If required, enter the proxy server user name.

New LMS Proxy Password – Use to set / update the proxy server password.

Confirm new LMS Password – Use to validate and confirm the proxy server password.

Test LMS Settings – click the test button to validate the LMS settings and connection.

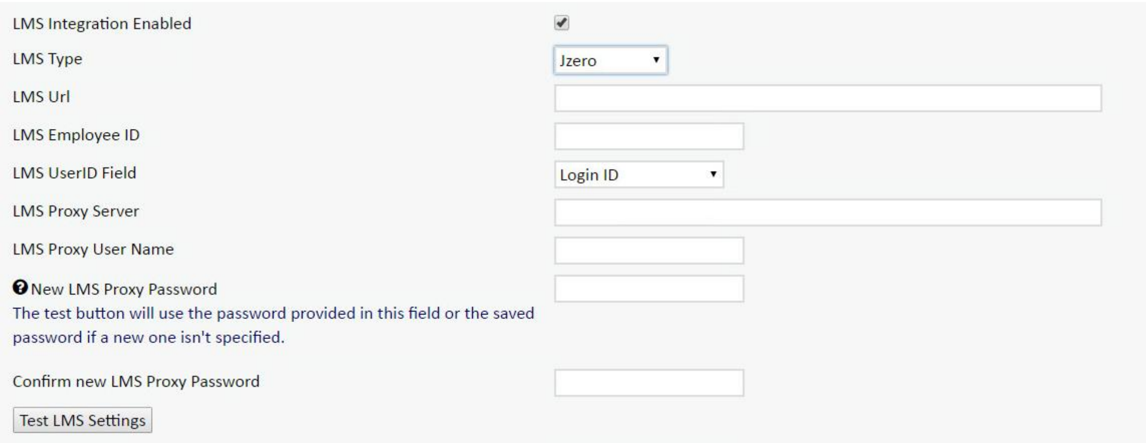


Figure 27: LMS Settings

9.5 Event Settings

The Event Settings tab contains settings and information about different types of configurable events. Events can be enabled/disabled and the interval between the events occurring can be modified in this tab. The events in this tab are described in the following sections.

9.5.1 Learning Items Assignment Email

This option is available in the System Settings page, in the Event Settings tab and sets the frequency for processing notifications of the assignment of learning items. To enable it, tick the Enabled checkbox for the Learning Items Assignment Email item. The ‘Interval in Minutes’ setting specifies how frequently emails will be processed. Any learning item assignments that occur within the interval period will be combined into a single email per user. Note: This feature requires that certain other settings have been specified; including the email field (specified in the general settings tab) and that users must have valid email addresses specified for this user field.

9.5.2 Completed Assessments Email

This option is available in the System Settings page, in the Event Settings tab and sets the frequency for processing notifications of the completion of assessments. To enable it, tick the Enabled checkbox for the Learning Items Assignment Email item. The ‘Interval in Minutes’ setting specifies how frequently emails will be processed. For each assessment that is completed within the interval period, an email will be sent to the manager(s) or trainer of the user who has completed the test. Note: This feature requires that certain other settings have been specified; including the email field (specified in the general settings tab) and that users must have valid email addresses specified for this user field. The email is only sent for normal assessments and “self” only assessments. Combined Feedback assessments have a different setting in the system settings screen. “Peer” assessments do not send emails.

9.6 HTTPS Support

The services, sites and planner client can be run in either HTTP or HTTPS.

10 Groups

Groups are created for the purpose of managing multiple users who need to take the same assessment(s).

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

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

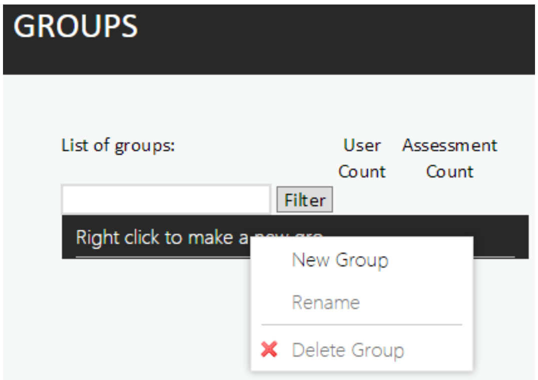


Figure 28: Managing groups

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

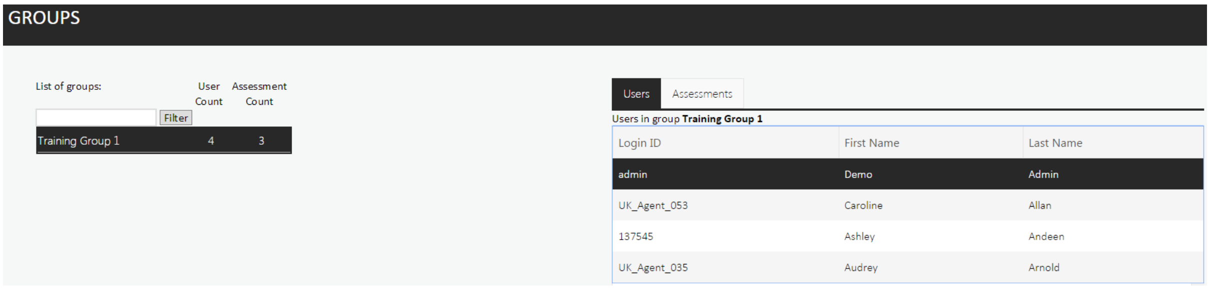


Figure 29: Viewing a group's users

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

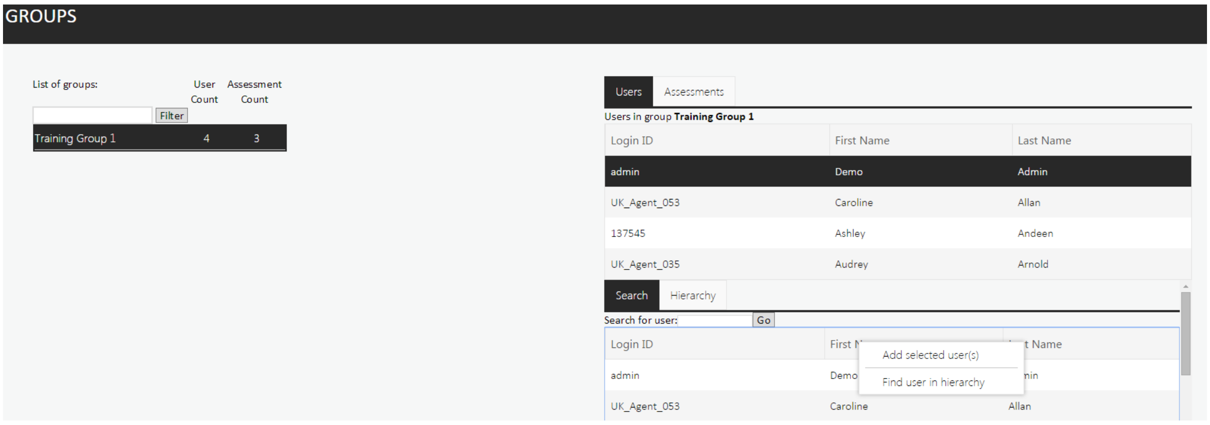


Figure 30: Adding a user to a group

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

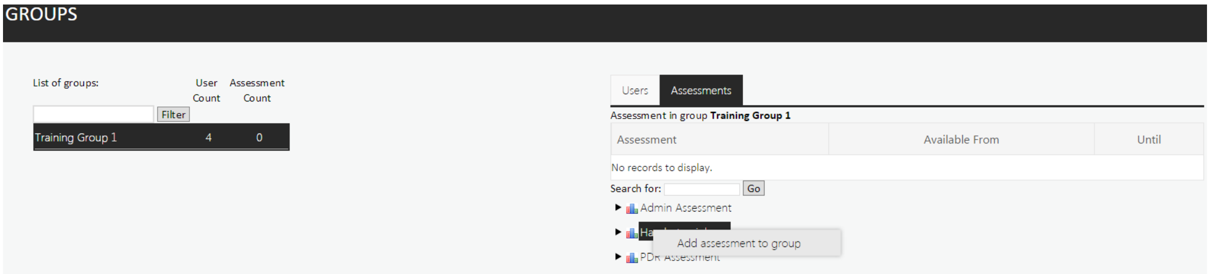


Figure 31: Associating assessments with groups

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

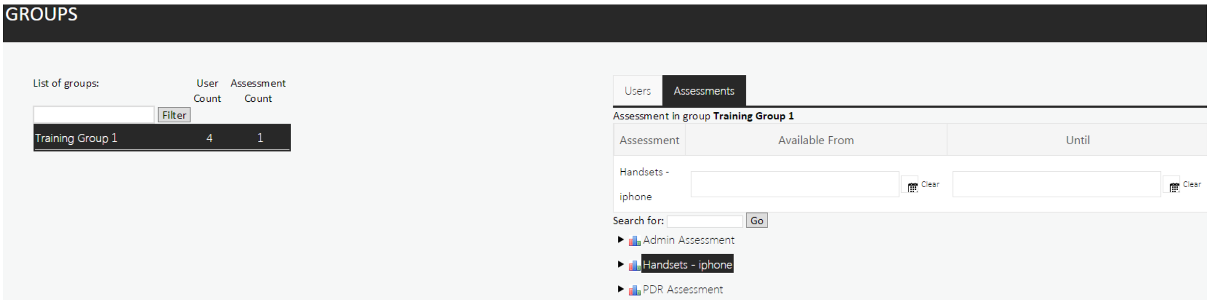


Figure 32: Setting assessment dates

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

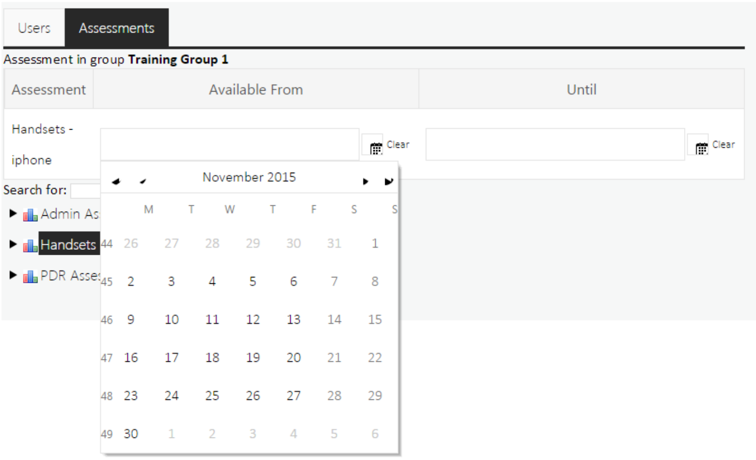


Figure 33: Setting assessment dates

Upon viewing assessments with assigned completion dates, if an assessment is not yet available (i.e. if it will not be available until a future date), the assessment will be visible but not available, as shown below.

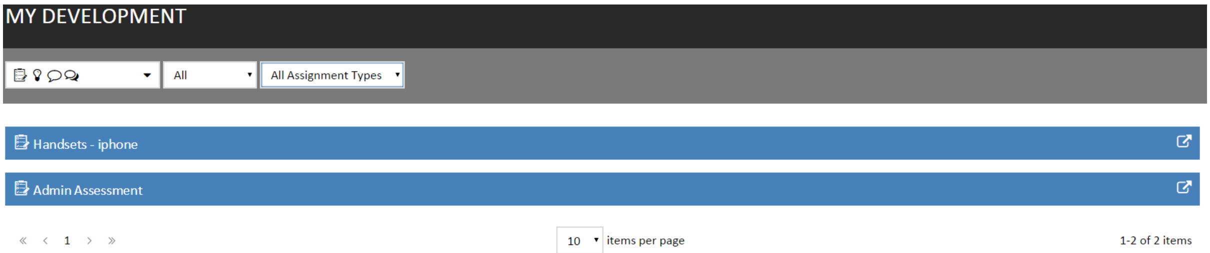


Figure 34: View assessment and assigned completion dates

10.1 Assigning Users into Groups based on Hierarchy

Users can also be assigned to a Group(s) based on their position(s) in the hierarchy.

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

Or

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

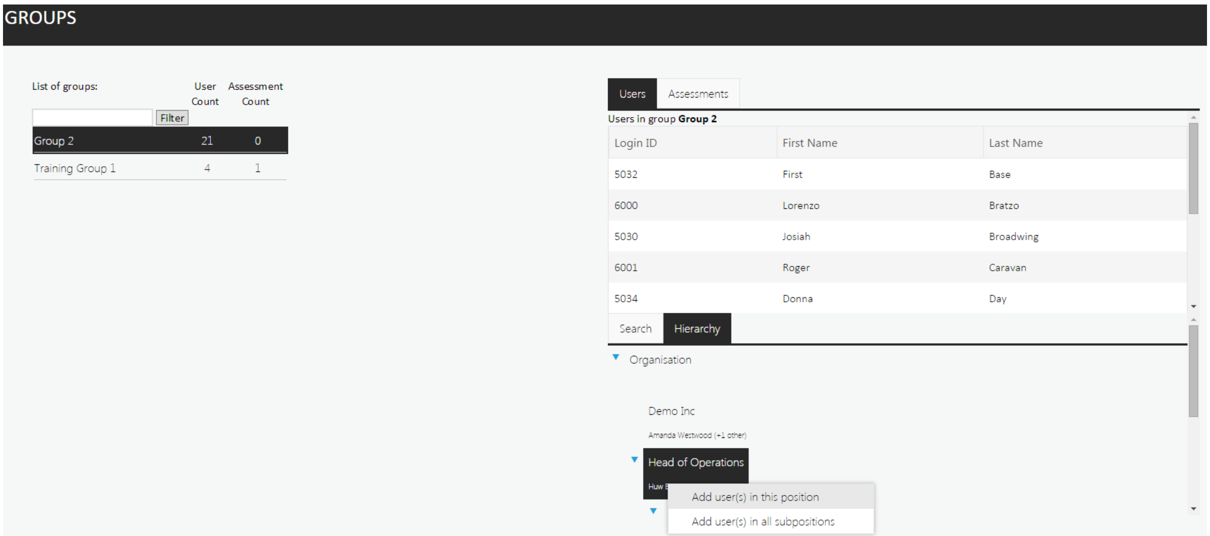


Figure 35: Assigning users to groups based on hierarchy

11 Rules-Based Assignments

Optimizer allows the creation of rules for easy assignment of users to groups, roles and job roles based on their data. The rules page initially displays a grid of existing rules with options to create new rules or to edit existing rules.

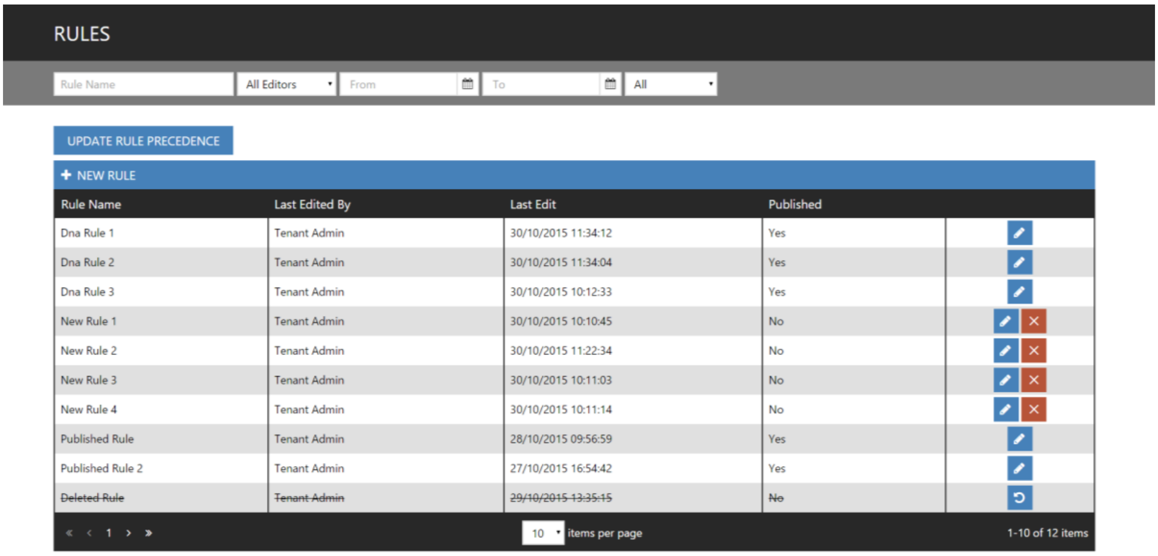


Figure 36: Rules grid

11.1 Rule Logic

Each rule must be given a unique name for clarity.

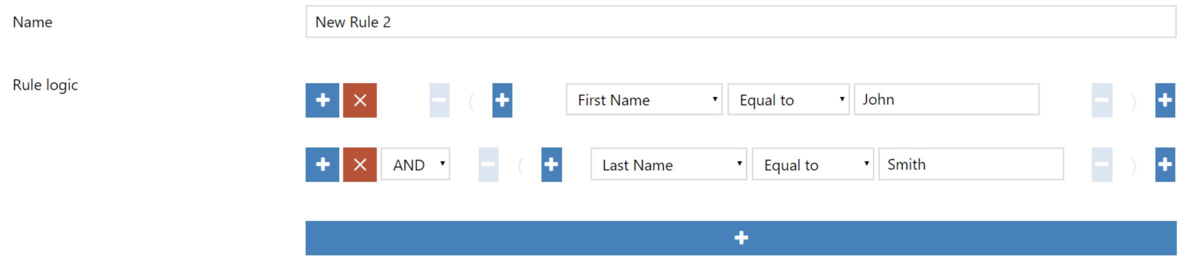


Figure 37: Rule logic editor

A rule is constructed by stringing together a series of logical clauses, each of which applies to a single User Field. Clauses can be added, removed and grouped using brackets.

11.2 Assignments

Rules can be set to assign users to Roles, Groups and DNA Job Roles. Note: Users can be assigned to multiple Roles and Groups but a user can only be assigned to a single DNA Job Role at any time.

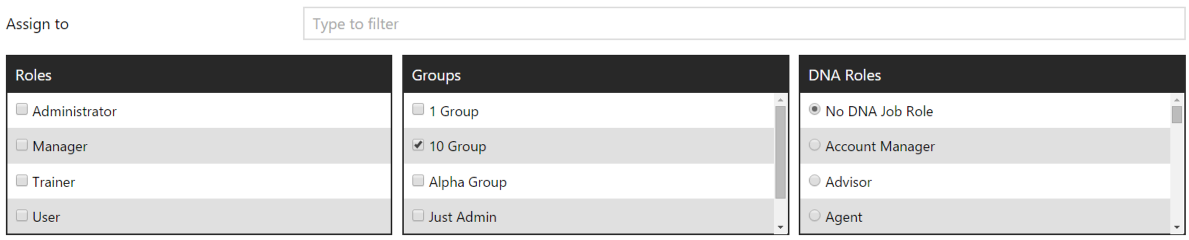


Figure 38: Rule assignment selection

11.3 Workflow

Figure 39: Workflow actions

For a rule to take effect, it must be published. When a rule is published it will be evaluated and its assignments applied to matching users. A rule may be modified without affecting users until it is published or re-published.

Unpublished rules may be renamed and/or deleted via the rules grid.

11.4 Precedence

A user can only be in a single DNA Job Role at any time. The precedence of rules that set a DNA Job Role can be set via the **Update Preference** button. If multiple rules exist that could potentially assign a user to a DNA Job role, the one with the highest precedence will be used.

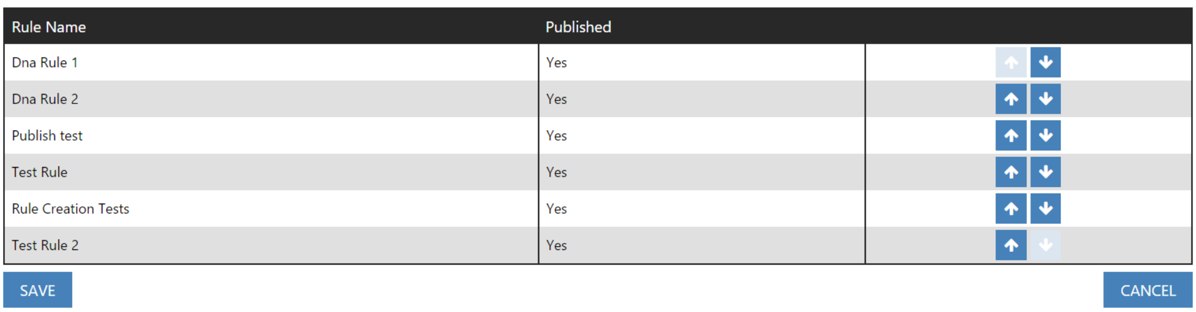


Figure 40: Rule precedence editor

12 Manage Assessments

Assessments are created and managed in the Assessment page.

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

There are four functions available:

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

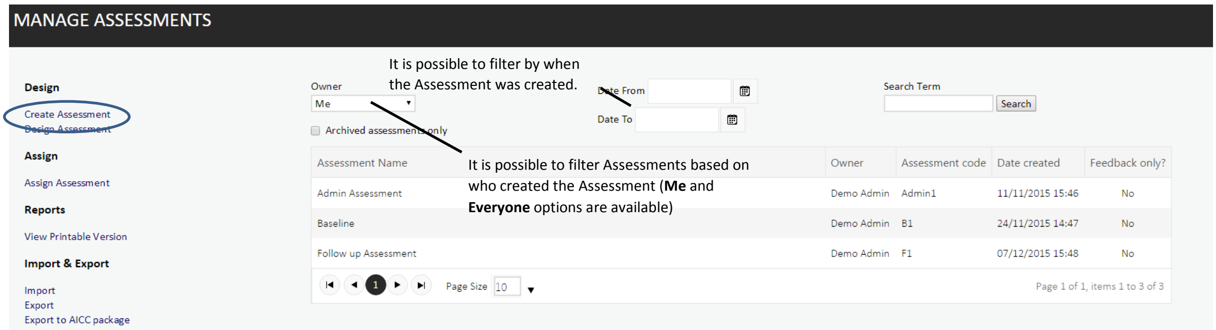


Figure 41: The Assessments page

To create a new assessment, click on **Create Assessment**.

12.1 Creating an Assessment

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

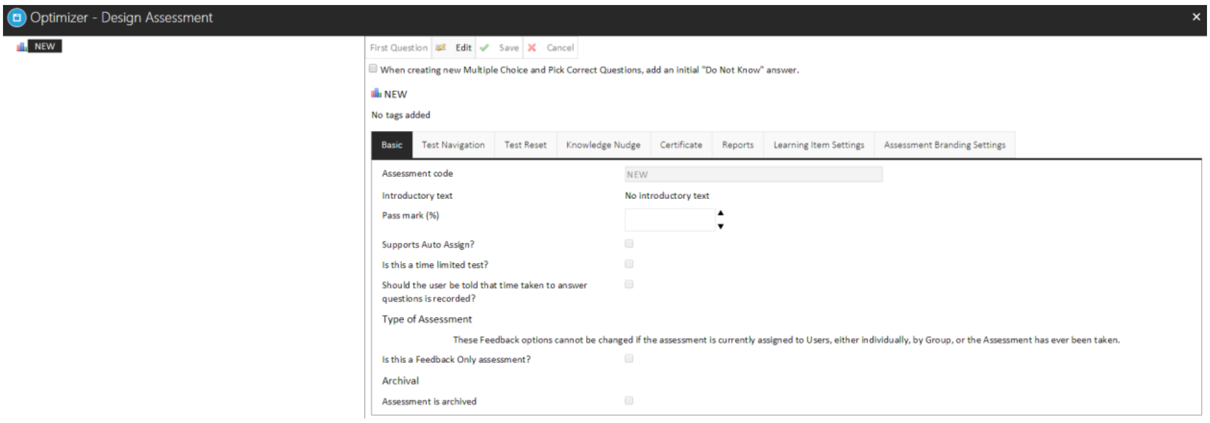


Figure 42: Creating assessments

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

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

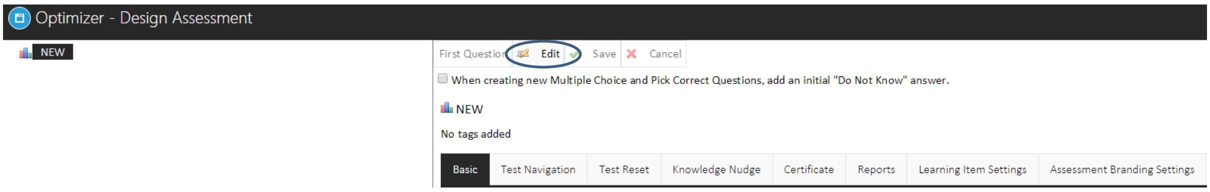


Figure 43: Editing assessment details

12.1.1 Basic Settings

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

Automatically insert a **Do Not Know** answer for multiple choice and pick correct answer questions.

Enter matching LMS code in the **Assessment Code** field if the assessment will be exported to an LMS.

Create customized introductory text for the assessment in the **Introductory text** field.

Enter a required overall pass score in the **Pass mark** field.

Automatic Assignment of Assessments

By default, assessments are only available to the users to whom the assessment has been assigned. It is, however, possible to set an assessment to support auto-assignment so that users who receive the URL to the assessment can launch it immediately without it being assigned to them manually. To enable this option, tick the checkbox labelled 'Supports Auto Assign?'. This will result in an Assessment URL appearing under the checkbox. This URL can be sent via email or other means to Optimizer users. Once they click on this link, the assessment will be automatically assigned to them and they'll be able to start it immediately.

Note: This option does not interfere with users who have already had the assessment manually assigned to them.

If a user clicks on the link and had already has the assessment assigned to them and has completed it, the assessment will have to be manually reset before it can be taken again.

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

Tick **is this a Feedback Only assessment?** If the assessment is a feedback-only assessment (will contain only ratings/ranking questions).

Tick **Assessment is archived** to archive an assessment.

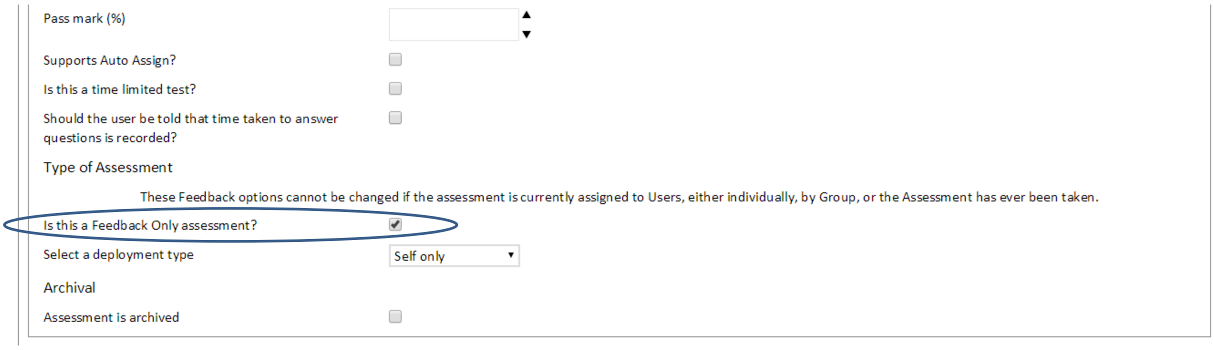


Figure 44: Feedback only and archive settings

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

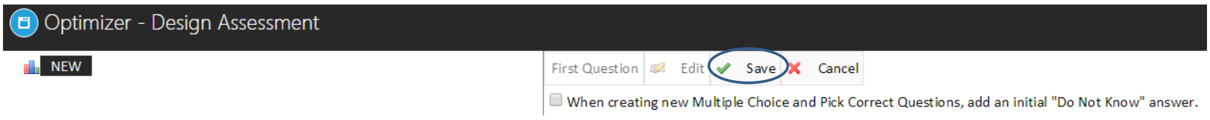


Figure 45: Saving changes

12.1.2 Contents

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

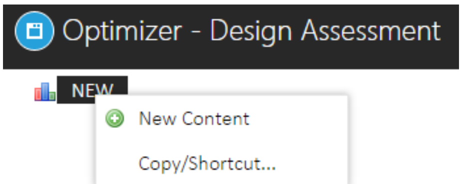


Figure 46: Adding new content to an assessment

The option to configure the minimum and maximum number of questions for the content is then available along with the option of creating custom introductory text and setting the content pass mark. Leaving **Can Copy** selected allows the content of this assessment to be copied or linked to another assessment.

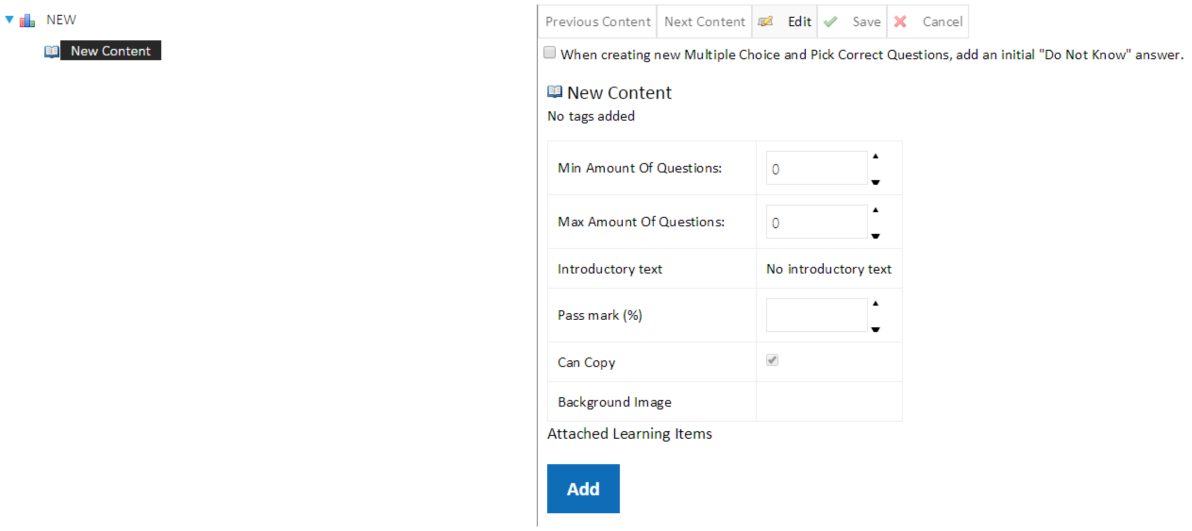


Figure 47: Assessment settings

12.1.3 Questions

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

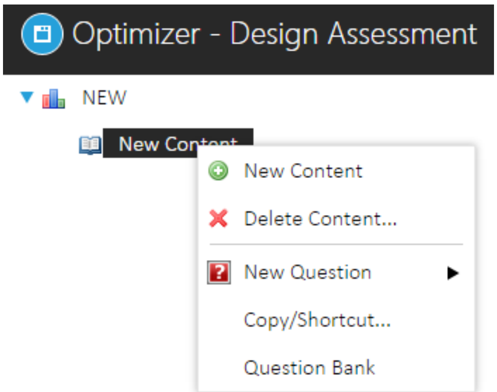


Figure 48: Adding questions to assessments

Select the appropriate question type when the **New Question** menu appears.

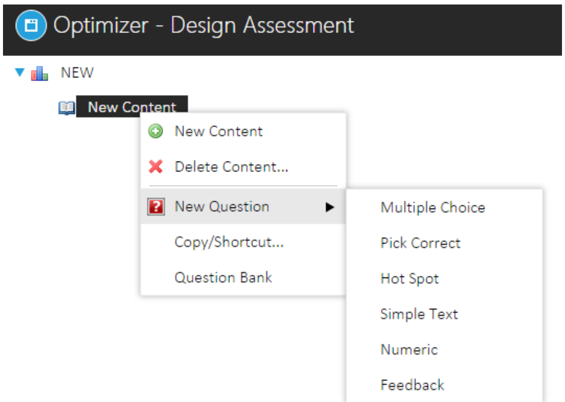


Figure 49: Setting the type of new questions

All questions (except feedback) have the option to be Critical or Mandatory and also have an option to request additional information.

Critical Questions must be answered correctly for the assessment to pass. If any Critical question is answered incorrectly, the assessment will fail regardless of the percentage scored.

Mandatory questions will always appear in the assessment.

Additional information may be provided with an answer which may allow “working out” or other information related to why someone chose that particular answer to a question.

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

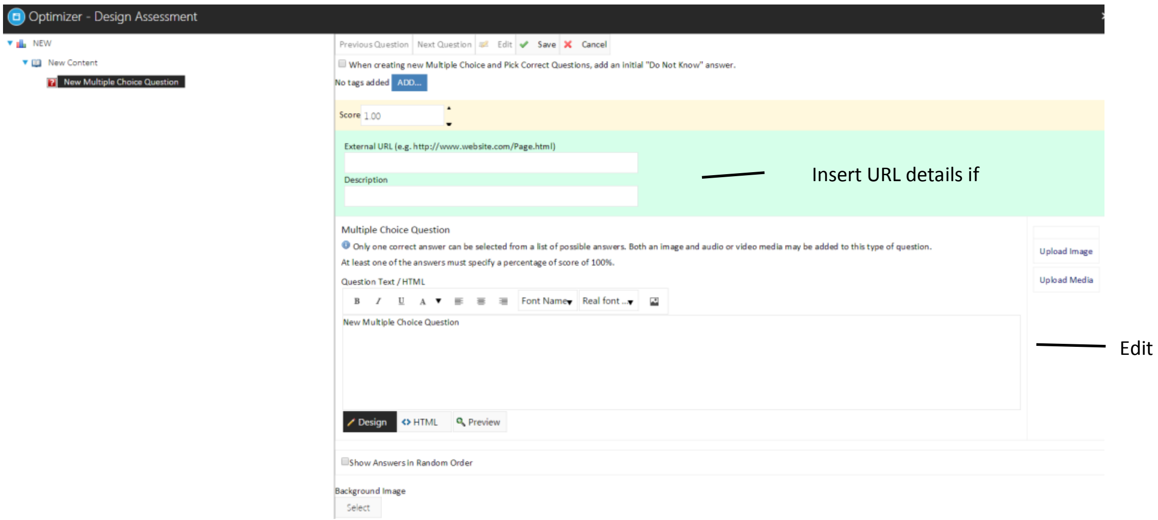


Figure 50: Adding external URLs to questions

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

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

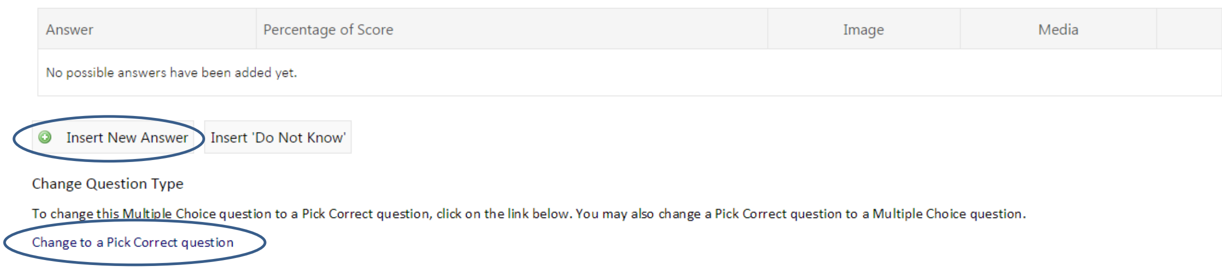


Figure 51: Changing question types and adding answers

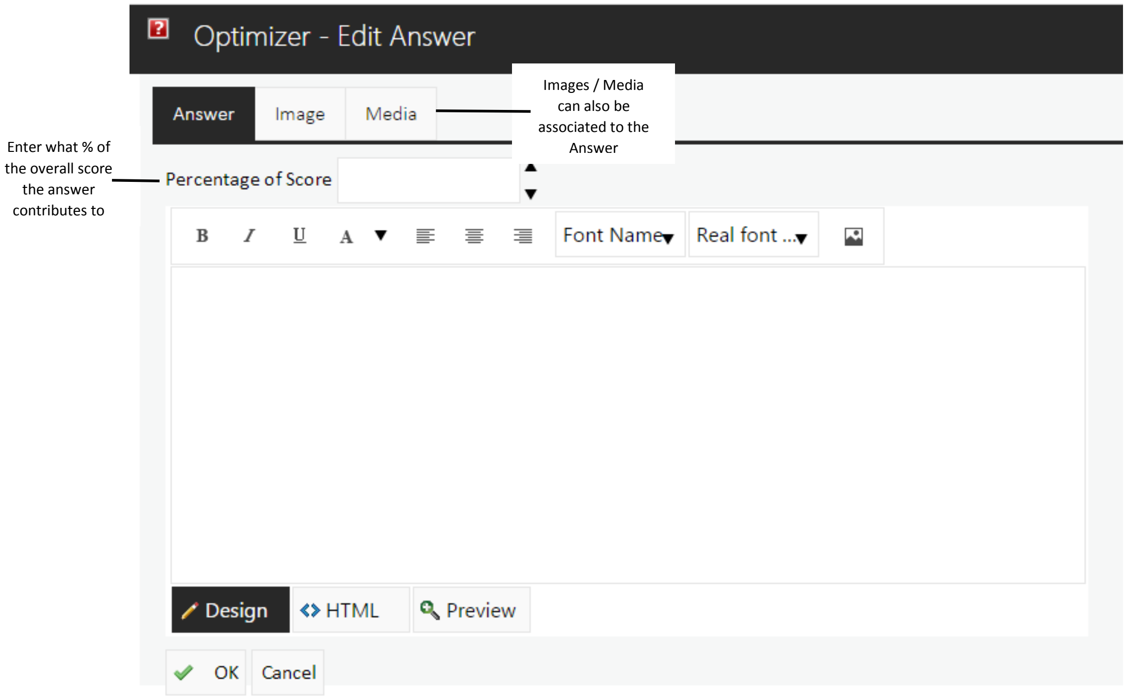


Figure 52: Setting question value, additional media and text

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

Image and **Media** files may be embedded into questions. To embed an image, select **Image**. The following window will appear to browse for the desired 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.

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

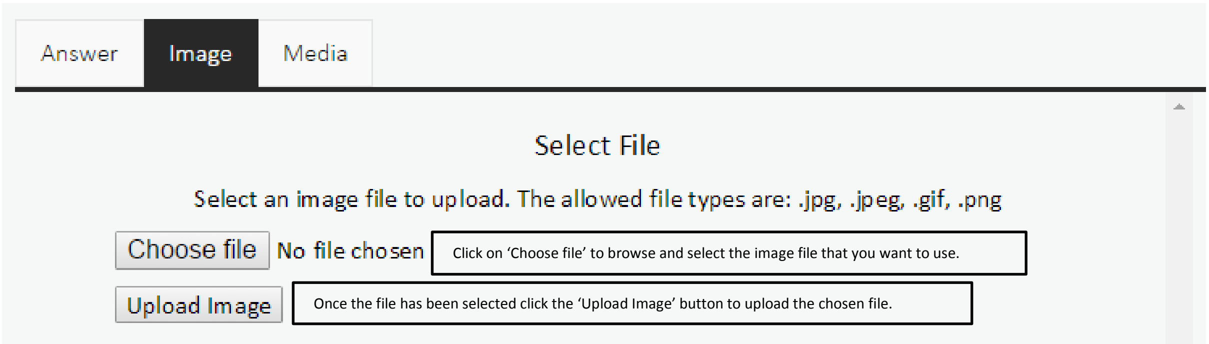


Figure 53: Adding an image to an Answer

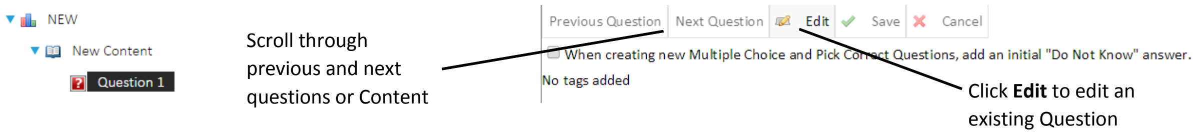


Figure 54: Editing and navigating between Assessment Questions

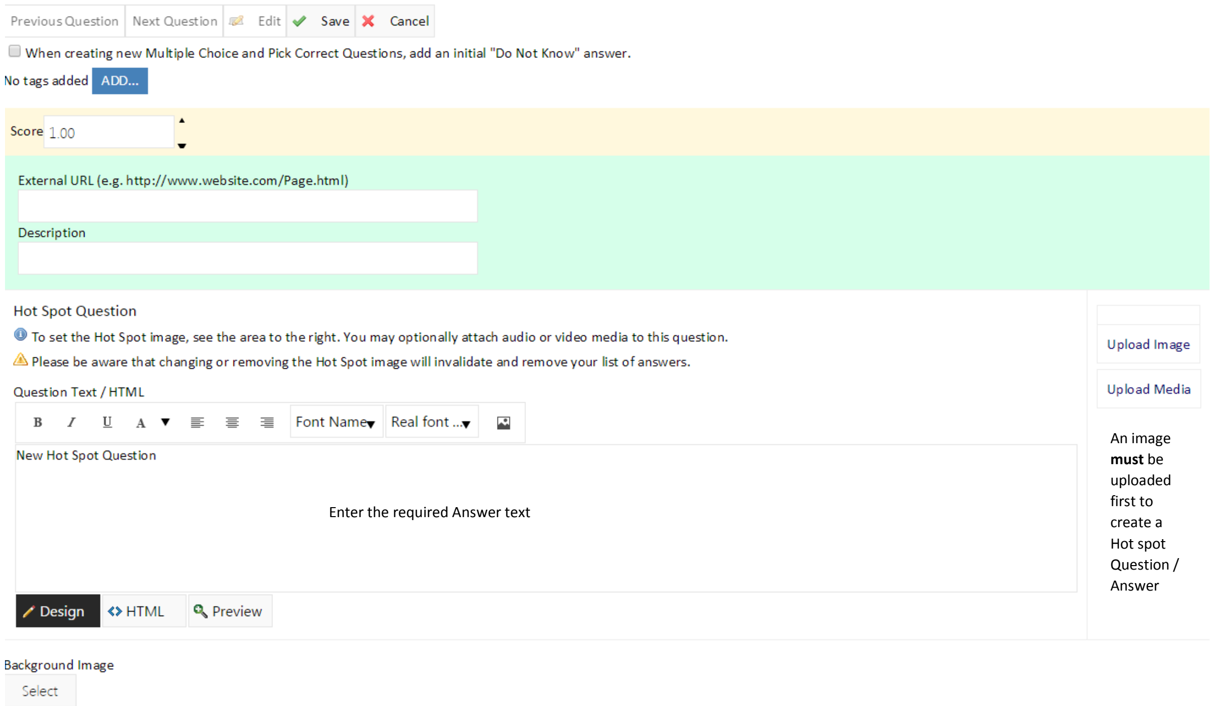


Figure 55: Preparing a hot spot image question

Hot Spot Questions

Follow the instructions to define the hot spot answer area.

Click **Define HotSpot Area…** then click where the top left and bottom right corners of the hotspot will be to define the area.

Figure 56: Defining a hot spot answer area

This will create a red box around the required answer

Figure 57: Defining a hot spot answer area

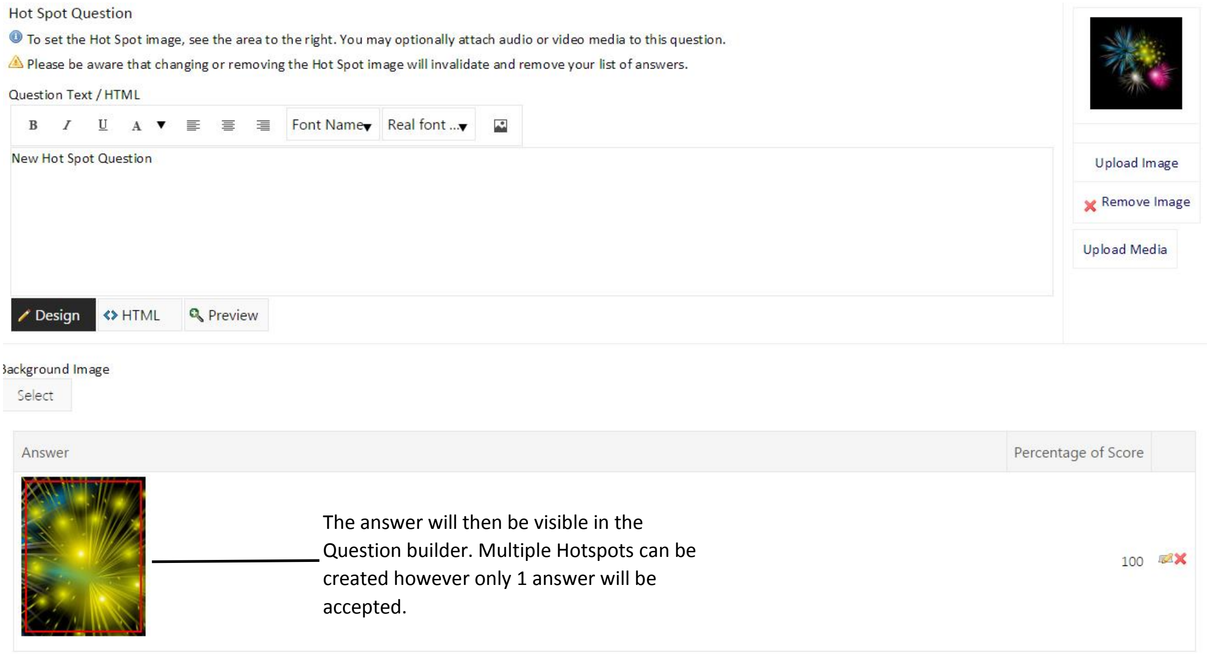


Figure 58: Display of hot spot answer

Select **Save** to save the completed Question.

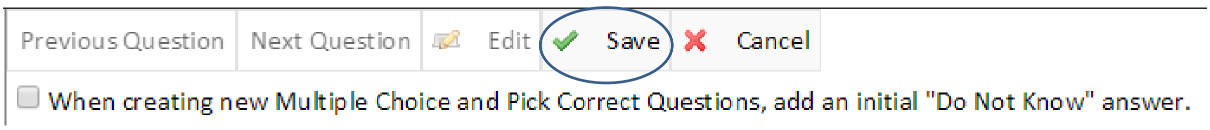


Figure 59: Saving completed questions

Simple Text Question

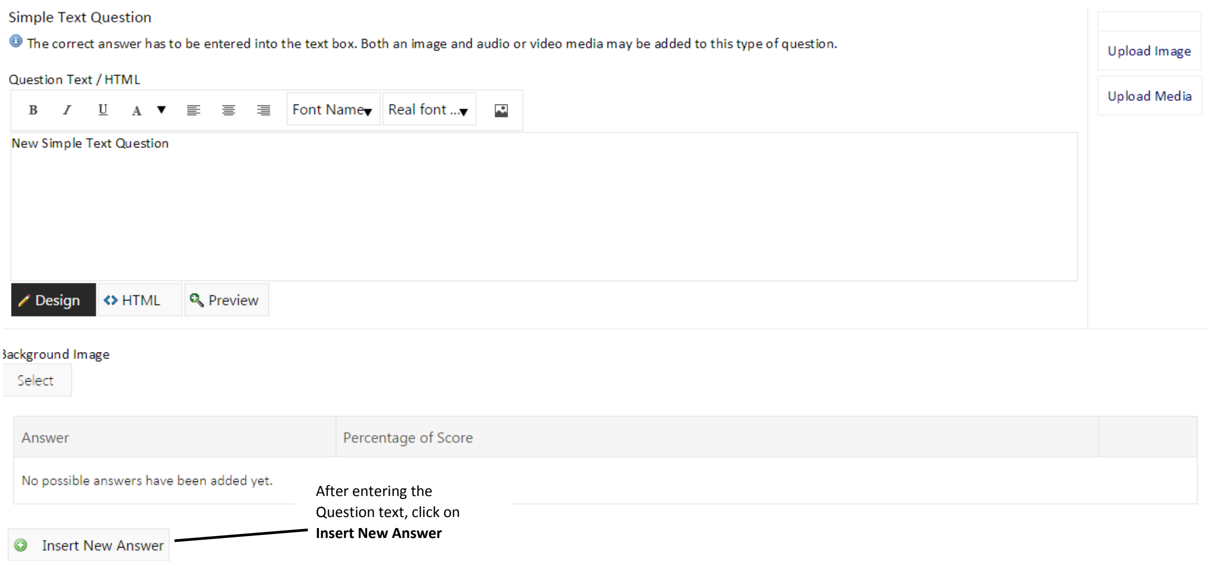


Figure 60: Creating question text and adding an answer

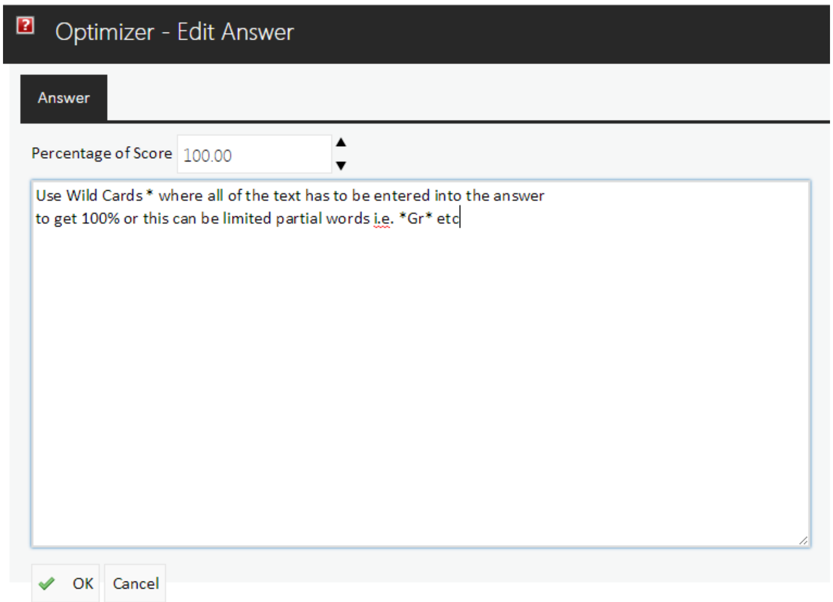


Figure 61: Adding answers and using wild cards

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

Numeric Question

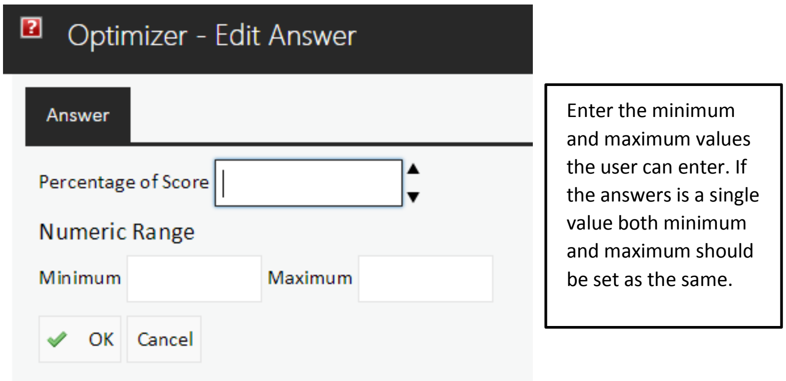


Figure 62: Delimiting ranges for numeric questions

Feedback Questions

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

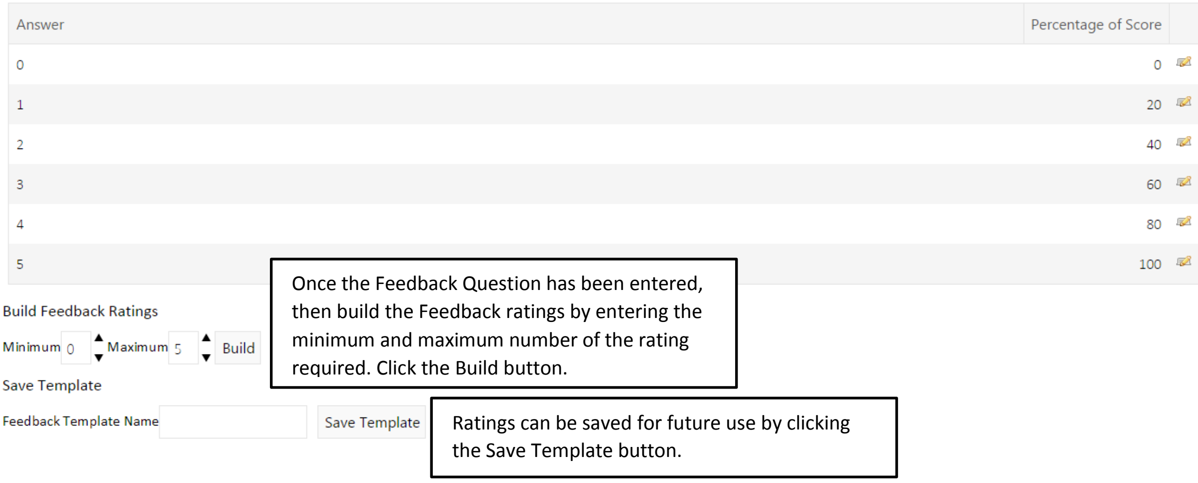


Figure 63: Delimiting ranges for feedback ratings

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

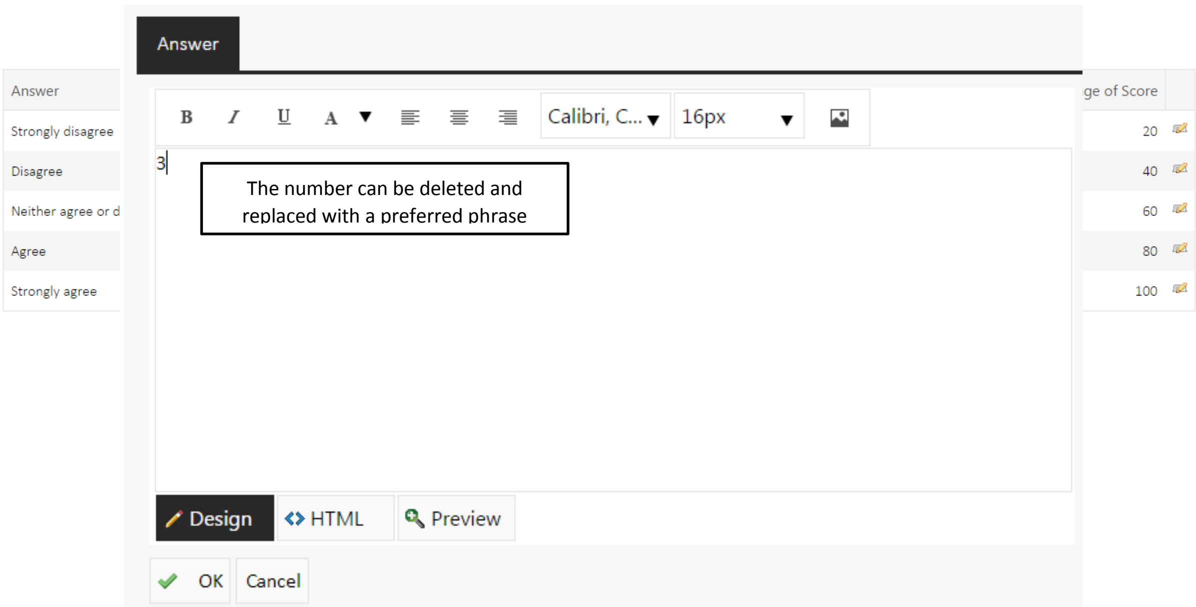


Figure 64: Adding detail to ratings

Figure 65: Display of rating detail and associated question

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

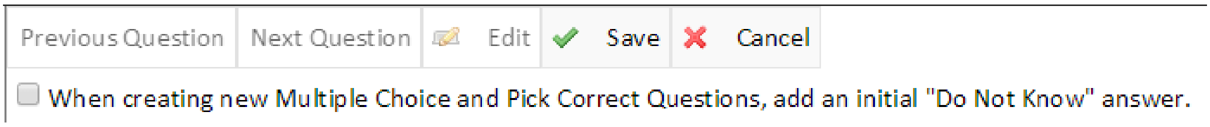


Figure 66: Editing existing questions

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

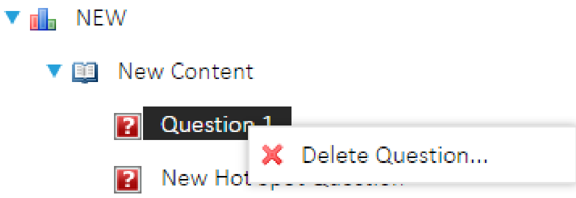


Figure 67: Deleting questions

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

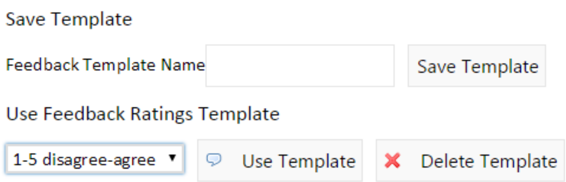


Figure 68: Associating existing templates with feedback questions

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

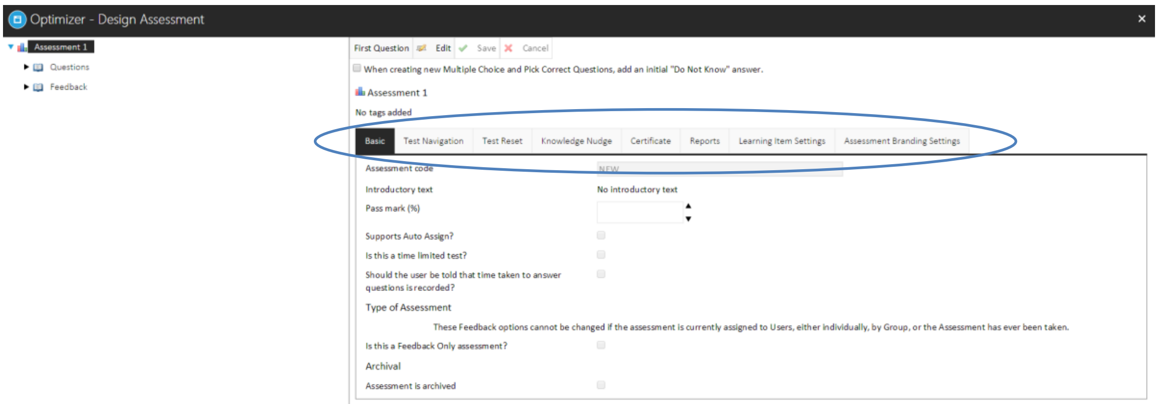


Figure 69: Accessing additional assessment detail and options

12.1.4 Answer Layout

When creating the answers for an assessment, it is possible to align the answers either horizontally or vertically. This can be done by selecting the “Question Layout” option dropdown as show below. This will allow for the format of the answers to be changed depending on the users desired presentation of the answers.

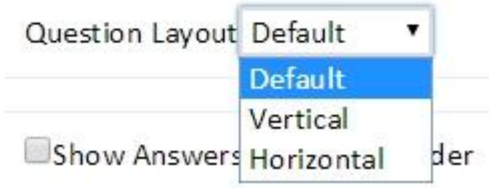


Figure 70: Question Layout Option

Selecting the Vertical option will present the answers in a column.

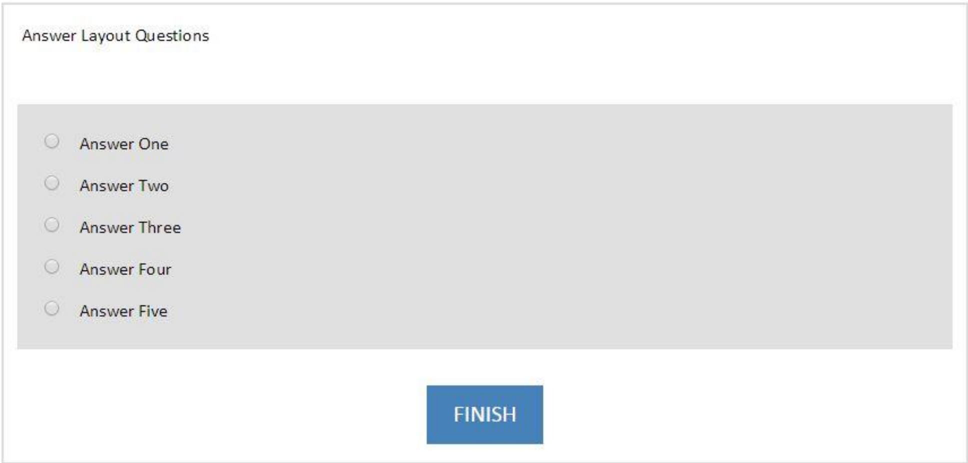


Figure 71: Vertical Answer Alignment

Selecting the Horizontal option will present the answers in a row.

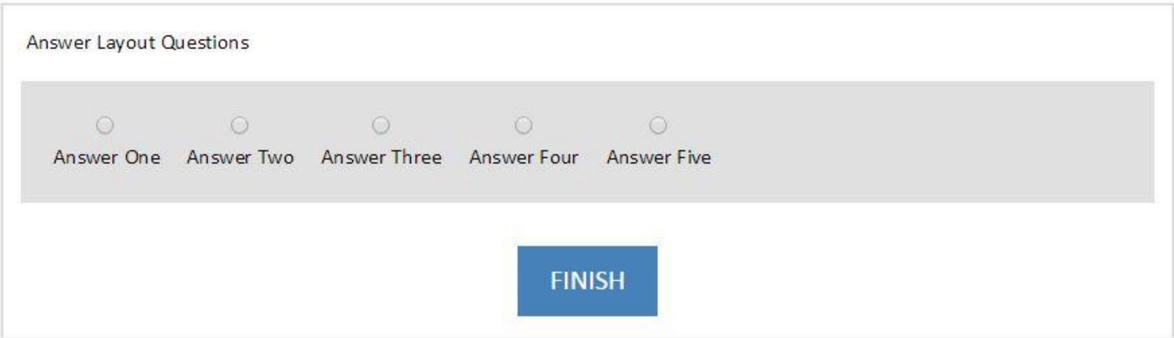


Figure 72: Horizontal Answer Alignment

12.1.5 Test Navigation

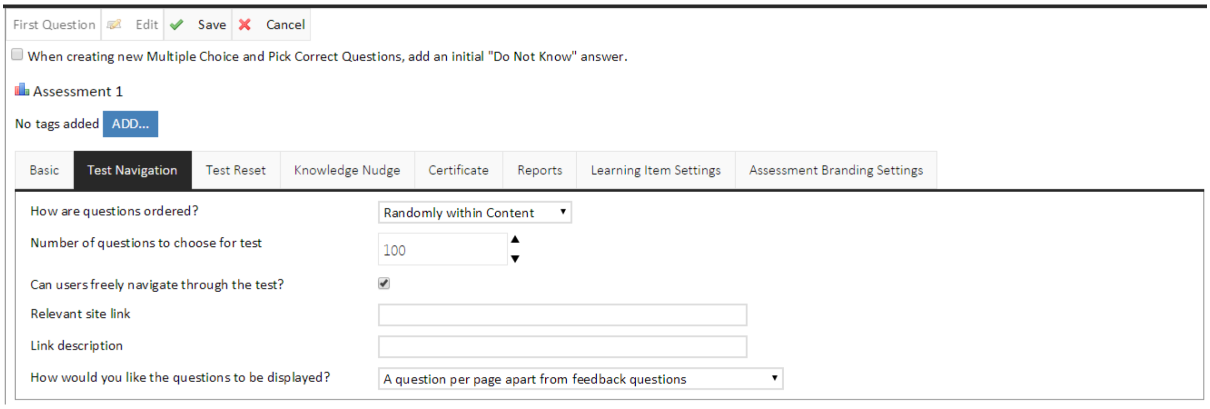


Figure 73: Test navigation tab

Click on **Edit** to access the Test Navigation settings

Define how questions are ordered by selecting one of the following options from the **How are questions ordered?** Dropdown list

- **In Order** – presents the questions in the order that they were created.
- **Random within Content** – keeps the content order but randomises the question order within the Content.
- **Randomly across Content** – Questions are presented completely randomly; without clear Conent sections.

Allow users to move ahead or back through the assessment (rather than having to answer the questions in a specific order) by checking the **Can users freely navigate through the test?** box

Allow addition of a website URL that may be helpful in answering the question by including a **Relevant site link**, which can include a **Link description** (User friendly description of the URL).

12.1.6 Test Reset

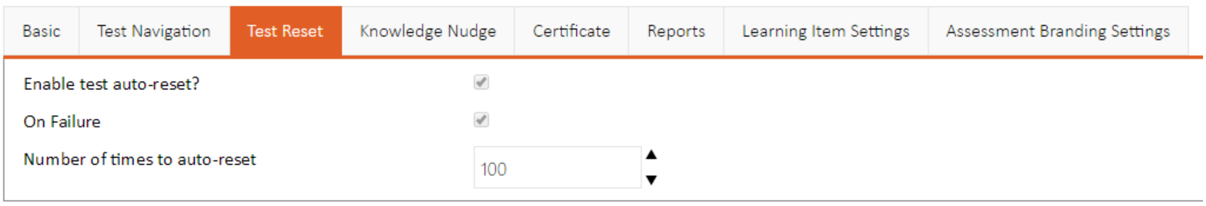


Figure 74: Automatic test reset

Checking **Enable test auto-reset?** will automatically reset the Assessment if the User doesn't achieve the required Pass Mark.

The **On Failure** checkbox is ticked by default. This will result in assessments only resetting if the user fails the test. If the checkbox is unticked, the assessment will reset regardless of whether the test is passed or failed.

Number of times to auto-reset enables you to set the maximum number of resets / retries the User can have before a Manager / Administrator has to reset the Assessment.

12.1.7 Knowledge Nudge

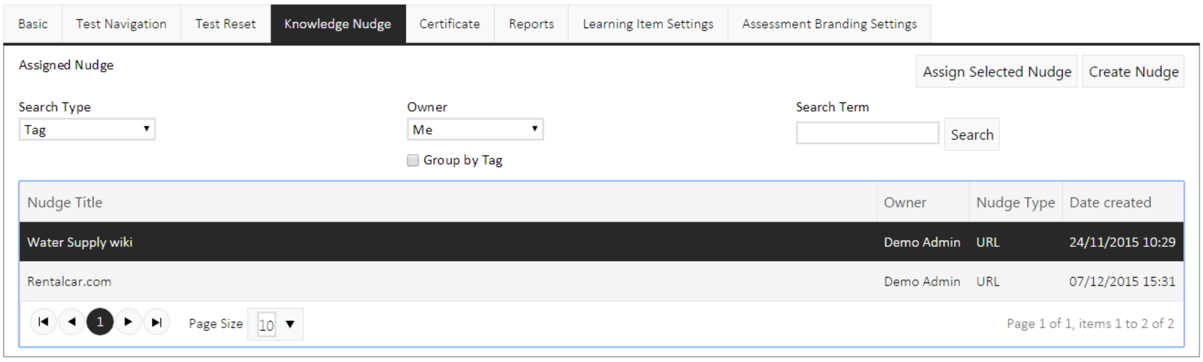


Figure 75: Associating a knowledge nudge URL or PDF

Existing Knowledge Nudges (described in Section **Error! Reference source not found.**) can be embedded into Assessments. Search for the Knowledge Nudge that you want to attach to the assessment, then highlight the Knowledge Nudge and click on Assign Selected Nudge. New Knowledge Nudges can be created from within this tab as well. For further information on Knowledge Nudges, please see Section 13.

12.1.8 Certificates

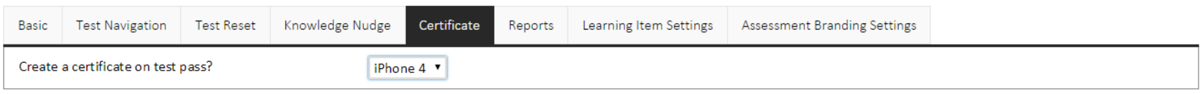


Figure 76: Associating a certificate with an assessment

Printable Certificates can be attached to Assessments by selecting the existing certificate from the dropdown list in the Certificates tab.

12.1.9 Reports

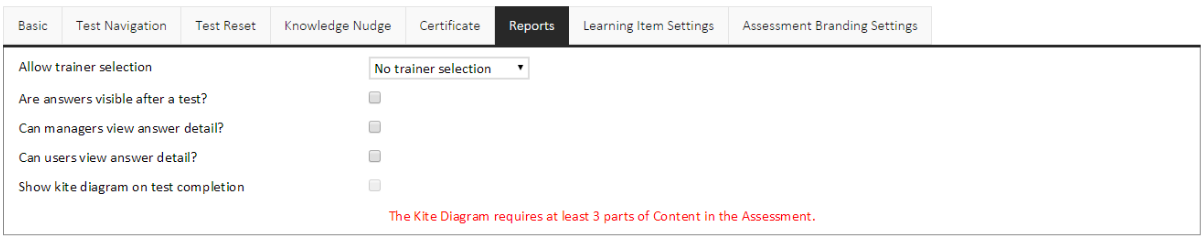


Figure 77: Viewing assessment results and additional options

Options for viewing assessment result reports include the following:

Allow trainer selection – allows users to select specific trainer who can have access to the results at the start of the Assessment.

Are answers visible after a test? – enables users to view the Assessment answers following completion.

Can managers / users view answer details? – manages who can view the given answers.

Show kite diagram on test completion –displays the content scores as a kite diagram (radar chart). Note: For this function to work, the Assessment must have a minimum of 3 Content sections.

12.1.10 Learning Items Settings

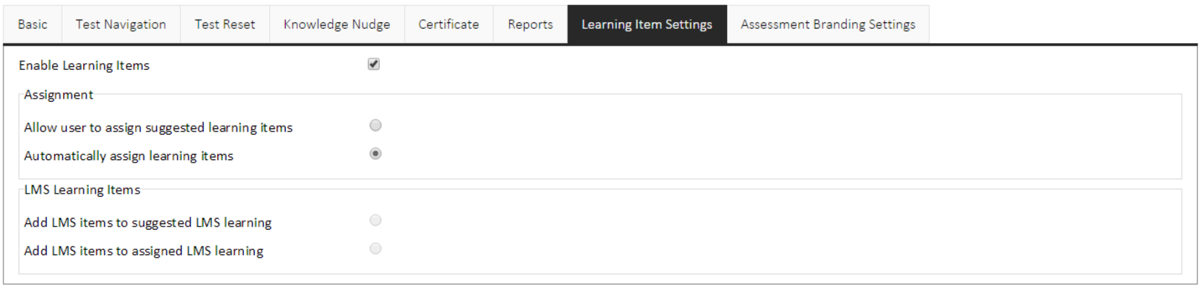


Figure 78: Assessment Learning Items settings

Options for enabling Learning Items (described in detail in Section Error! Reference source not found.) include the following:

Enable Learning Items – enables Learning Items to be attached to the Assessment

Assignment

Allow users to assign suggested learning items – enables the user to self-select / self-enrol for the Learning Items suggested based on their performance.

Automatically assign learning Items – enables the automatic assignment of Learning Items following an Assessment based on the user's performance.

12.1.11 Assessment Branding Settings

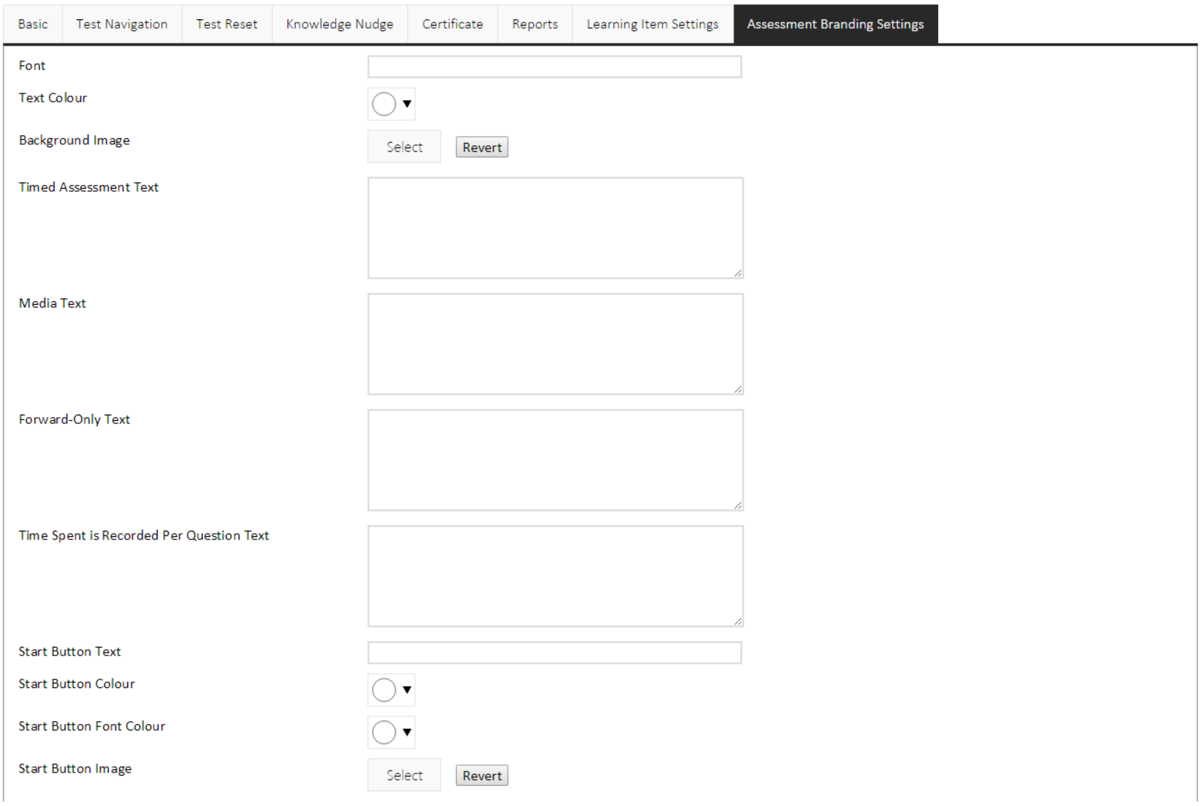


Figure 79: Assessment Branding Settings

The Assessment Branding Settings allow:

- Standardised fonts and colours to be applied throughout the Assessment.
- Customisation of Assessment instruction text.
- Customisation of navigation buttons.
    - Setting the wording and colours
    - Or select a custom button image to be used.

12.1.12 Question Bank

The question bank allows Assessment designers to quickly search for existing questions and copy/shortcut them into new assessments. This feature is accessible from the context menu after right-clicking on a content section in the assessment designer.

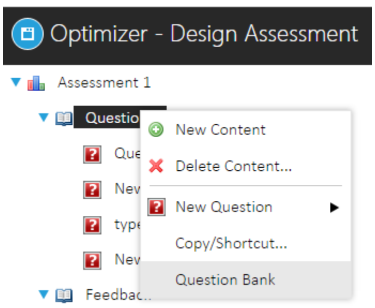
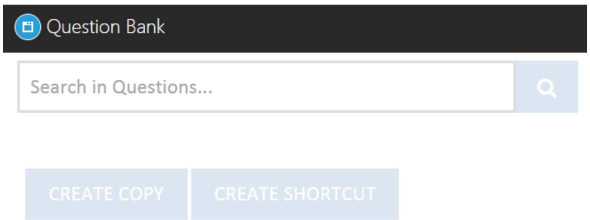


Figure 80: Question Bank

The question bank page initially includes a search bar and button. Entering a search term and clicking the search icon will result in a table of search results appearing below the search bar.

Figure 81: Search bar



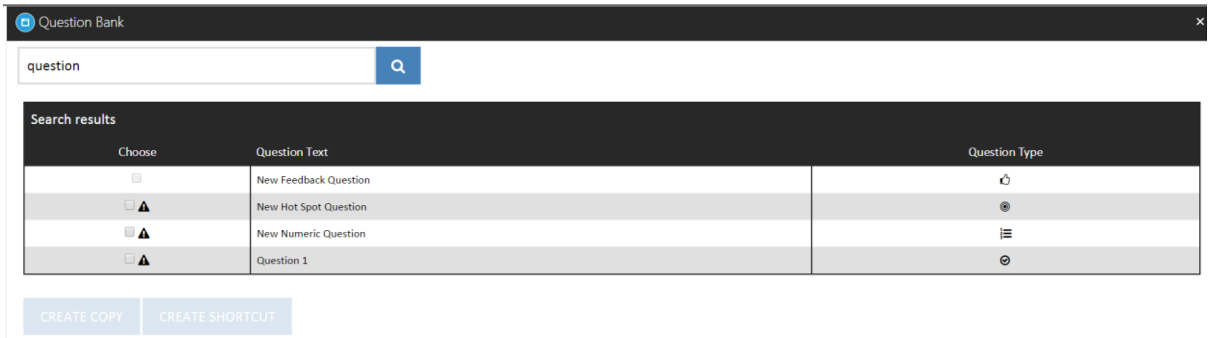
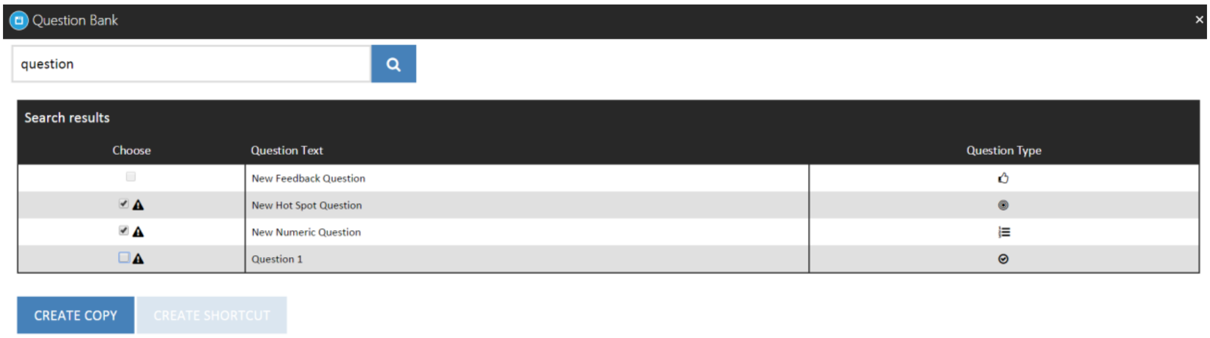


Figure 82: Search results

The table of results includes checkboxes allowing the selection of questions for copying/shortcutting into the current assessment, question text, and an icon representing the question type. Hovering over the question type icons will enable a text-based description of the question type to appear.

Figure 83: Selecting questions to copy/shortcut



Selecting one or more questions from the search results will activate the create copy and create shortcut buttons. Copying a question creates a duplicate of the question, so should be used when changes to the question are required. If no changes are required then shortcut should be used instead. Copy/shortcut follows the following restrictions:

- Content cannot contain both feedback and non-feedback questions.
- Content cannot contain both sub-contents and questions.
- A question can only be shortcutted into content once.
- Non-feedback questions cannot be added to feedback-only assessments.

12.1.13 Associating Learning Items with Assessment Content Sections

Optimizer supports the ability to associate learning items with assessment content sections along with score ranges for the content sections. Users are either assigned learning items automatically once they've completed an assessment, or may have the option to assign learning items to themselves if their score for the content section is within the range specified for the content-learning item association.

To associate learning items to content sections, open the assessment that you wish to modify and click on the content section in the assessment hierarchy:

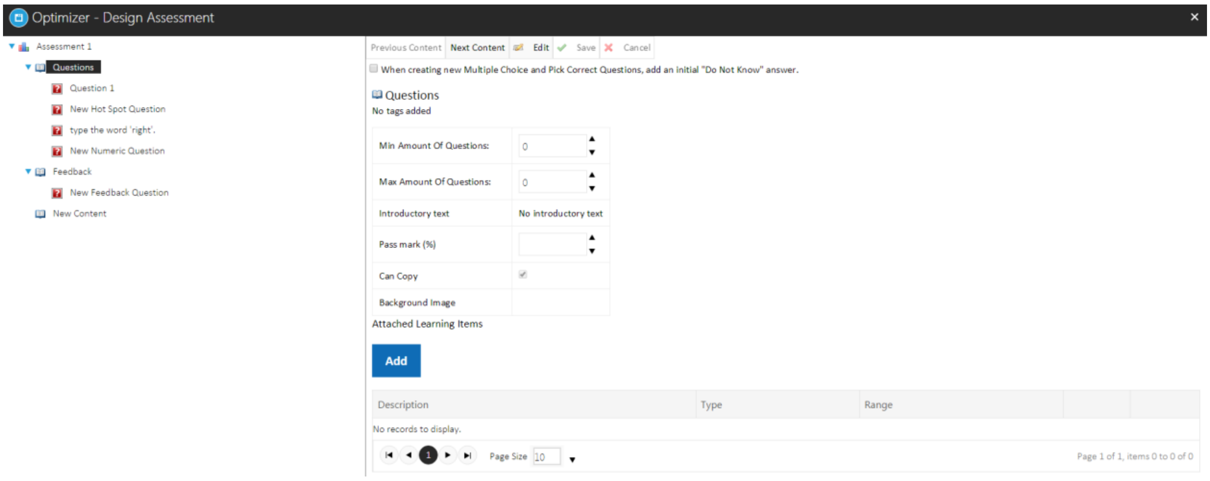
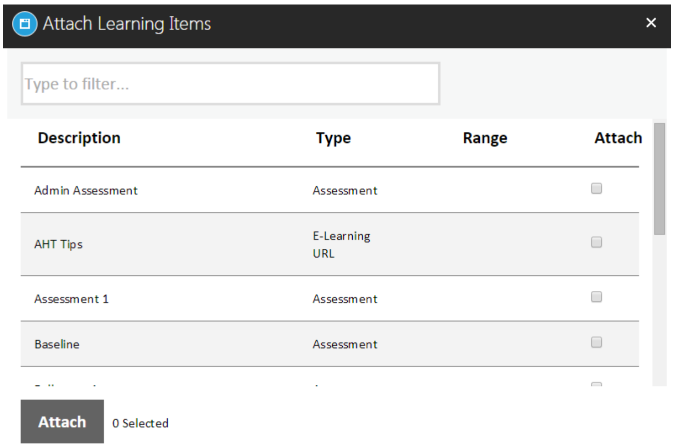


Figure 84: Attaching learning items to a content section

Click the Add button under **Attach Learning Items** to open the **Attach Learning Items** screen.

Figure 85: Searching for learning items



This form lists all available learning items that can be attached to the content section. The search bar at the top can be used to search for specific learning items. To associate learning items, tick the **Attach** checkbox and set a score range for the learning item. Different learning items can have different score ranges so users will be presented with different learning items depending on the score they achieved for that content section. Once you've finished attaching and setting score ranges for the learning items, click the **Attach** button to complete the process.

The attached learning items will then appear in the table under the add button for the related content section.

Note: entering values into the search bar will hide learning items from the display even if they've been attached. This is reflected in the number of selected items counter next to the **Attach** button.

To change the setting of the learning item assignment, i.e. whether users are given the choice to assign learning items to themselves or whether the learning items are automatically assigned, click on the root assessment node in the root hierarchy view. Click on the **Learning Item Settings** tab and click the **Edit** button to enable editing of the Learning Item settings.

Check the **Enable Learning Items** option if you want learning items to be either automatically or manually assigned to users once they complete the assessment. Enable the appropriate radio button in the Assignment section based on your preference.

Note: If you have integrated Optimizer with a third-party LMS, you will also have an additional set of radio buttons in the assessment's Learning Item Settings tab. These radio buttons are used to control whether learning items are added to the suggested list or the assigned list for users who complete the assessment.

12.2 Printing an Assessment

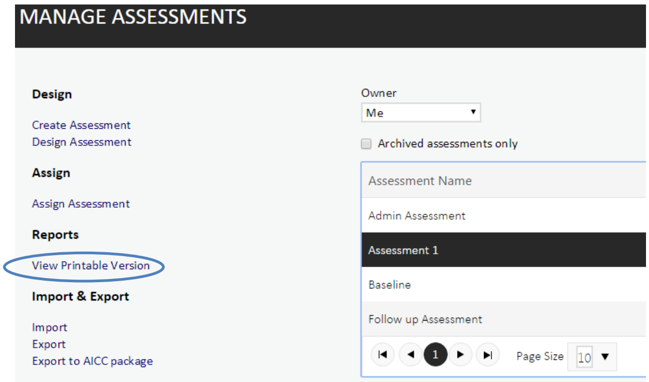


Figure 86: View Printable Version

To print off a version of the assessment, highlight the assessment first and then click on **View Printable Version.**

12.3 Import / Export

The **Import and Export** options enable the sharing of existing Assessments with other Optimizer users. The **Export to AICC package** creates an AICC course descriptor that can be used with Learning Management Systems.

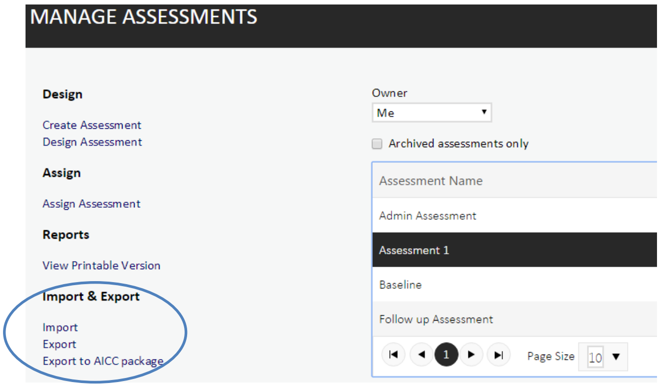


Figure 87: Import/Export options

Note: Exporting assessments will not include the following settings:

Learning Item Settings tab: Enable Learning Items

LMS: Enable this assessment in the LMS

Certificate: Create a certificate on test pass

13 Knowledge Nudges

Knowledge Nudges are simply information that a user must view, and are normally associated with assessments of the same topic/information. Knowledge nudges are created in one of 3 formats:

- A URL that points to a website on the internet or an internal intranet site
- A PDF document
- A Multimedia file (video, audio)

Knowledge Nudges are often used as robust replacements to paper briefings as each user's understanding of the contents can be assessed.

Standard reports available in Optimizer can also detail the number of times that a user has accessed any Knowledge Nudges and the average and overall duration of each view.

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

In order for Optimizer to display PDF content correctly, Adobe Acrobat must be installed on the user's computer. The Adobe Acrobat Reader is freely available from Adobe.

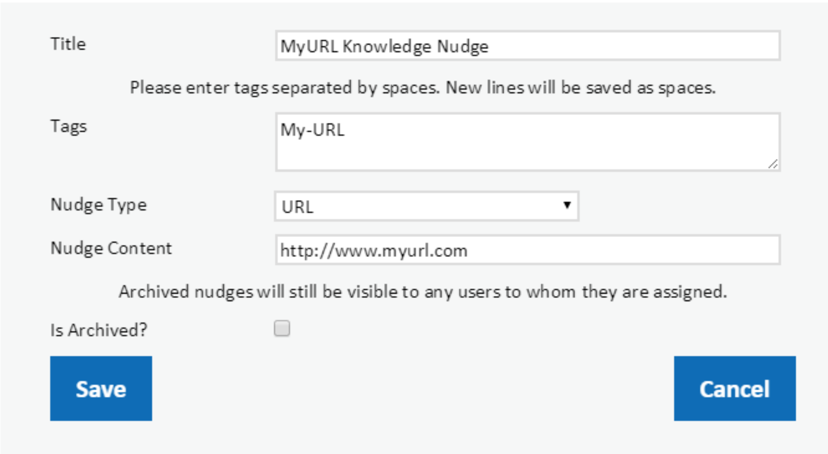
Note: Only one knowledge nudge can be assigned per assessment.

13.1 Creating Knowledge Nudges

To create new Knowledge Nudges, go to the **Knowledge Nudge** page and select **Create Nudge**. Select whether you require your Knowledge Nudge to be a website/external URL, a PDF or a multimedia file by selecting the appropriate option from the **Nudge Type** drop-down list.

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

Figure 88: Creating a URL knowledge nudge



Please note that if the Optimizer application is running over https, then URL nudges must also be accessed over https.

If you wish to upload a PDF to Optimizer to be used as your Knowledge Nudge, select the **PDF (Portable Document Format)** option from the **Nudge Type** drop-down list. This will display a **Select** button for you to locate the PDF document on your computer, as shown.

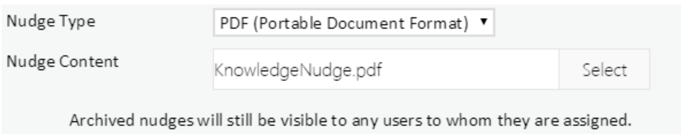


Figure 89: Creating a PDF knowledge nudge

Multimedia knowledge nudges can be created in the same way as PDF knowledge nudges; first select **Multimedia** from the **Nudge Type** drop-down list, then click the **Select** button to choose a multimedia file.

Note: Viewing of multimedia nudges is not supported in Internet Explorer 8.

In order to create some types of interactive multimedia nudges you may require additional software not supplied with Optimizer such as Microsoft PowerPoint and Adobe Acrobat.

Changes to Knowledge Nudges such as text modification, images, charts and colour schemes are managed within the program that was used to create the original content. For example, if the original content was created using Microsoft PowerPoint, changes can be made as shown in the PowerPoint screenshot below. Additional help on using PowerPoint can be found within its Help Menu.

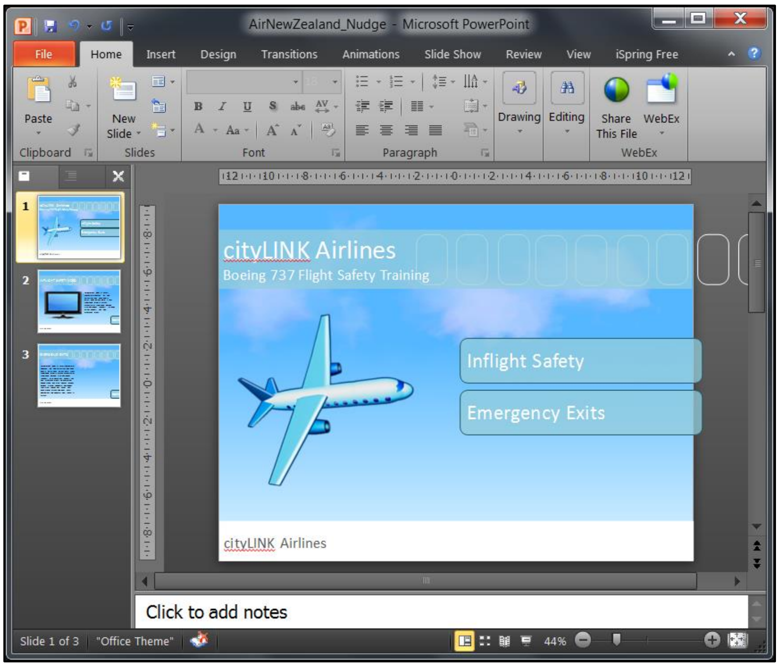


Figure 90: Using Microsoft PowerPoint or Adobe Acrobat to create multimedia nudges

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

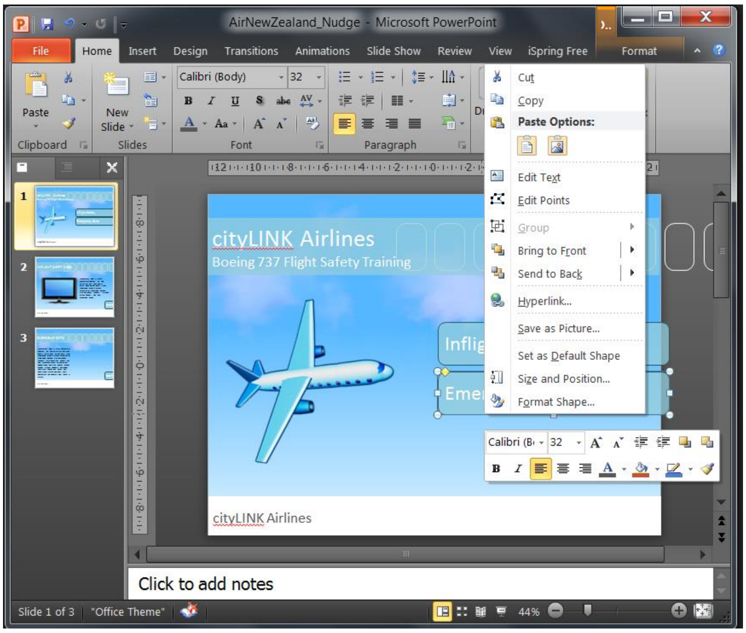


Figure 91: Setting presentation elements as hyperlinks

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

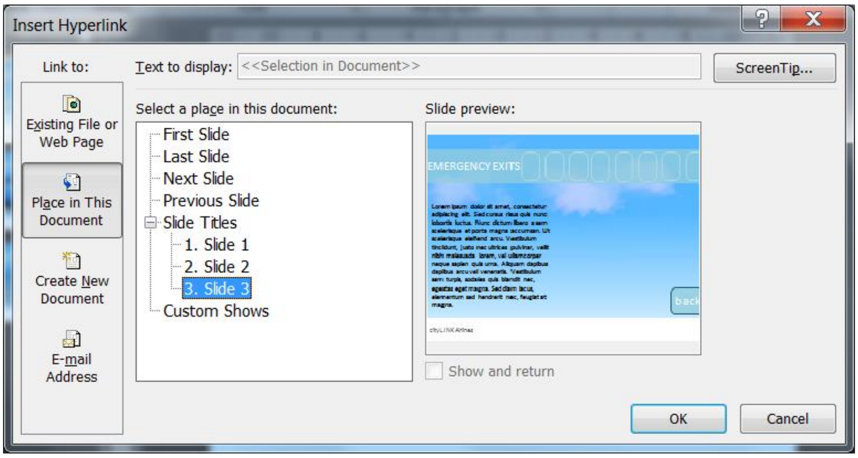


Figure 92: Setting hyperlink target

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

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

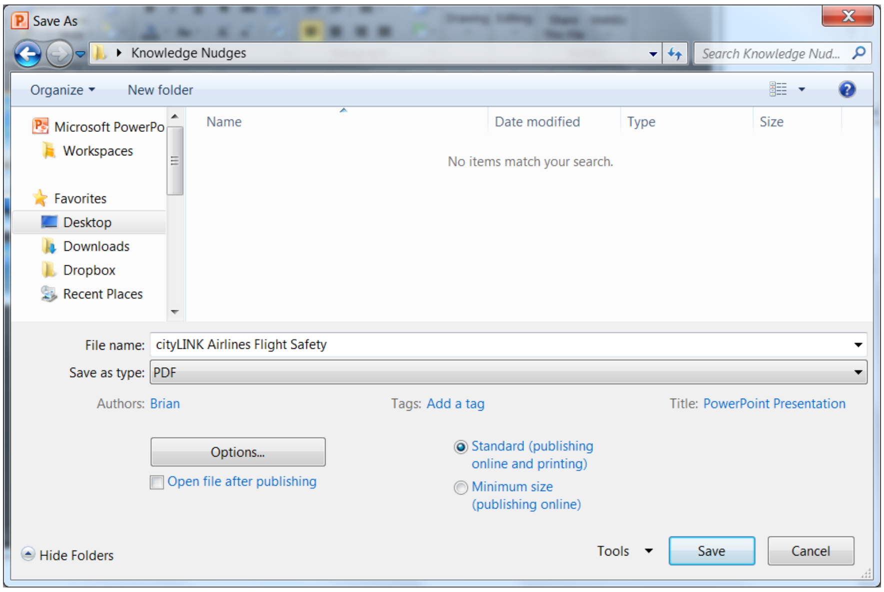


Figure 93: Saving PowerPoint presentations as PDF documents

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

Insert Video Content

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

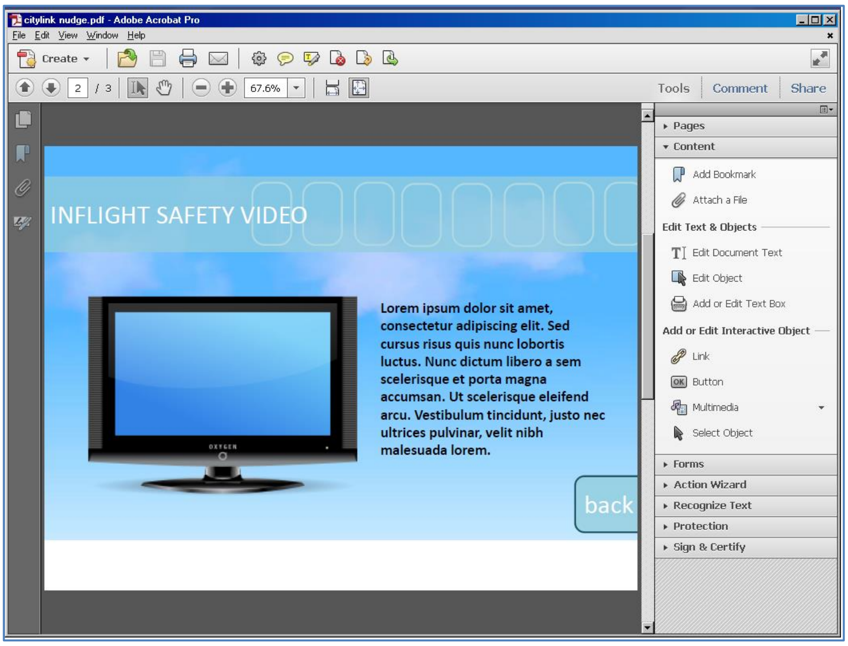


Figure 94: Adobe Acrobat multimedia content types

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

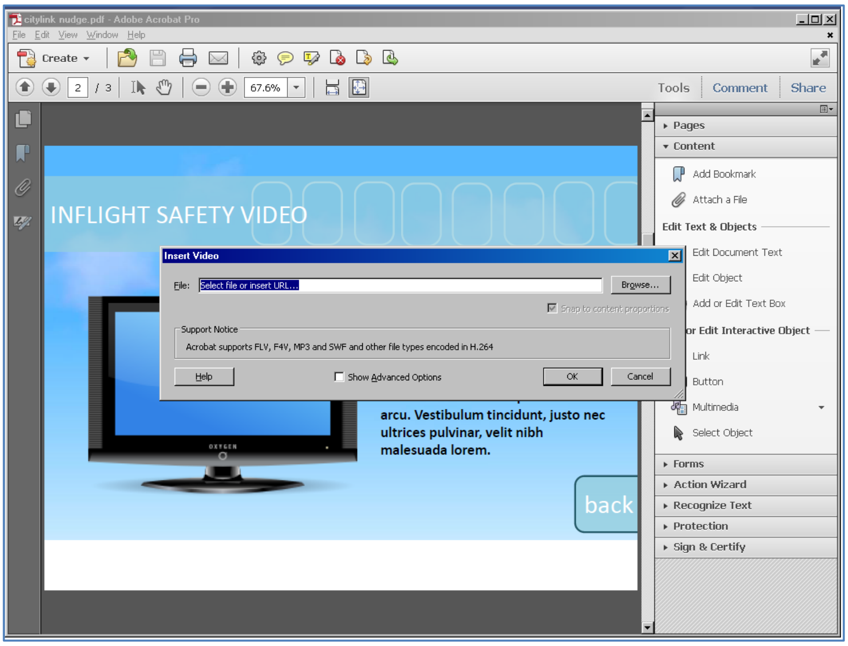


Figure 95: Inserting a video file into a PDF document

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

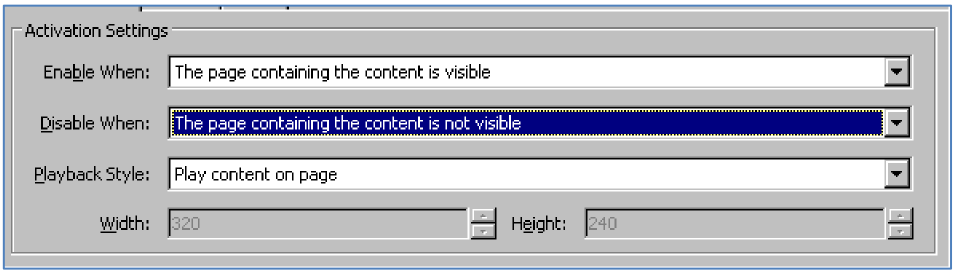


Figure 96: Multimedia advanced options

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

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

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

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

Follow the steps below to assign a Knowledge Nudge to an assessment:

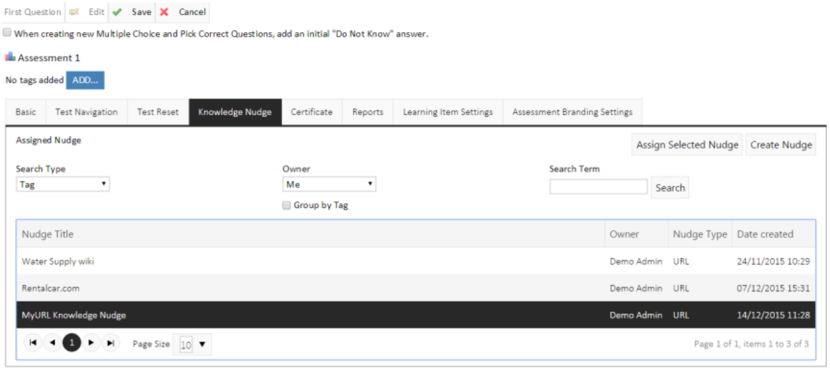


Figure 97: Selecting a knowledge nudge

1. Go to the **Manage Assessments** page
2. Select the assessment
3. Click the **Design Assessment** link
4. Click the **Edit** button at the top of the page
5. Click the **Knowledge Nudge** tab
6. Select the Knowledge Nudge from the table (it is possible to search for the Knowledge Nudge via tag/title/tag & title options)
7. Click the **Assign Selected Nudge** button.

When a user begins an Assessment, the Knowledge Nudge icon will appear on the first page of the Assessment. Clicking on this item will then launch the associated Knowledge Nudge (URL or PDF).

When a user selects an Assessment, they are advised that there is an attachment to view before accessing the test. The user will not be able to begin the Assessment until they have viewed the Knowledge Nudge

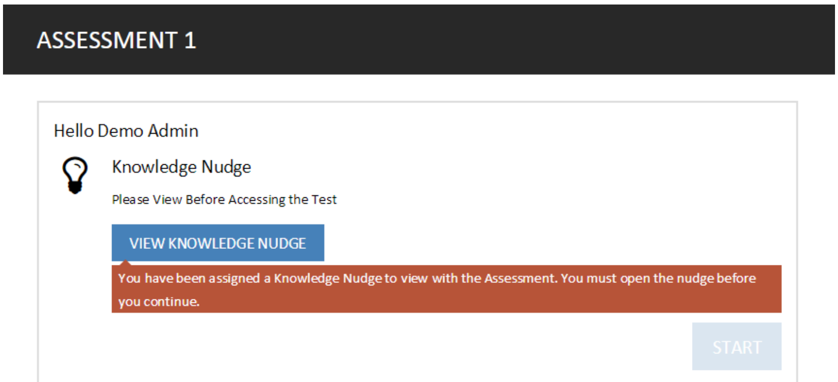


Figure 98: Mandatory pre-assessment attachment

14 Managing Learning Items

Optimizer supports the creation of a range of learning items which can be associated with DNA components (Discussed in further detail in Section **Error! Reference source not found.**) to assist in improving user performance. Supported learning item types include: **Assessment**, **Knowledge Nudge**, **E-Learning URL** and free text. The **JLMS Course** learning type may also be available if you have configured the optional LMS integration feature.

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

14.1 Creating Learning Items

To create a new learning item, go to **Learning Items** page and click the **Create Learning Item** link.

Next, specify the **Type** of item that you wish to create.

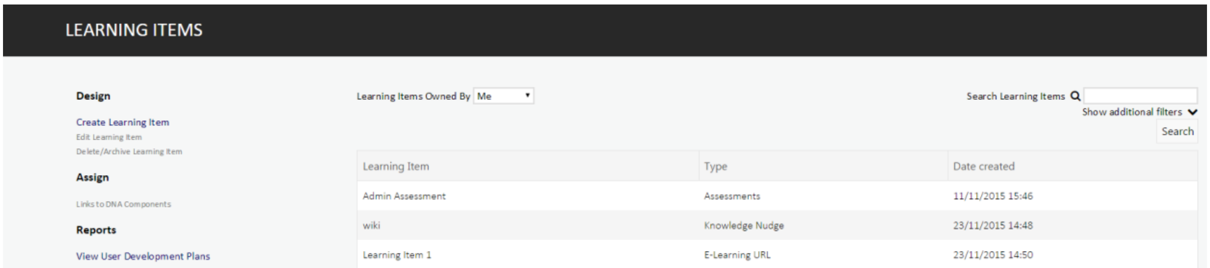


Figure 99: Learning Items Page

Note: When creating an Assessment or Knowledge Nudge an associated Learning Item is automatically created.

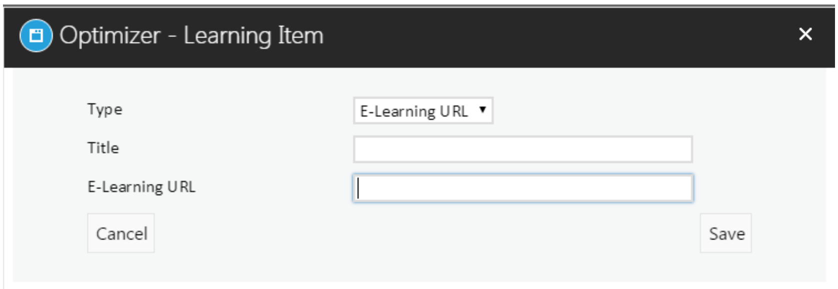


Figure 100: Creating Learning Items

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

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

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

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

14.2 Editing Learning Items

To edit a learning item, browse to the Learning Items page. Select a learning item from the table and click the **Edit Learning Item** link. A dialog box will appear that includes the item's current settings. You can then edit these settings before clicking **Save** to apply the changes.

14.3 Deleting Learning Items

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

14.4 Filtering View of Learning Items

Optimizer supports a range of options to filter the display of Learning Items, including restricting the items shown based on the user who created them (i.e. either display all Learning Items or just those created by currently logged in user), constraining by date created range, and choosing whether to include archived Learning Items. It is also possible to search for a specific Learning Item by entering a set of keywords in the **Search Learning Items** text box and clicking the **Search** button.

14.5 Assigning Learning Items to DNA Components

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

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

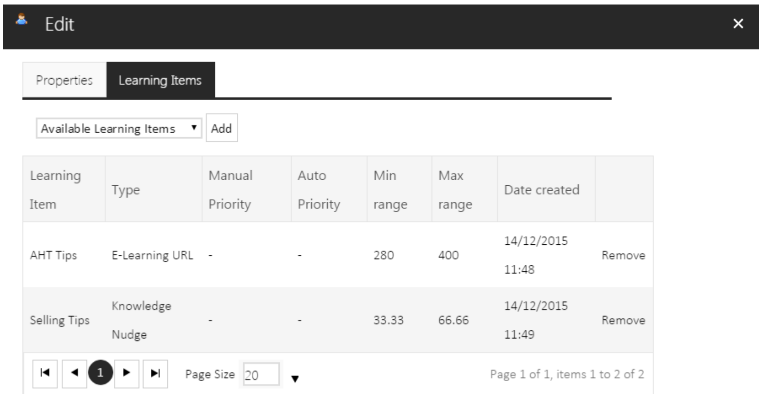


Figure 101: Assigning Learning Items to DNA Components

The Learning Item can also be associated with a specific range of component values. This range will determine whether the Learning Item is displayed as **‘Recommended’**, **‘Extended’** or **‘Core’**.

- If the user’s DNA score is above the range specified for the item it will be marked as ‘Core’.
- If the user’s DNA score is in the defined range then it will be marked as ‘Recommended’.
- If the user’s DNA score is below the range of the learning item it will be marked as ‘Extended’.

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

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

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

14.6 Manually Assigning Learning Items to Users

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

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

14.7 Automatically Assigning Learning Items to DNA Components

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

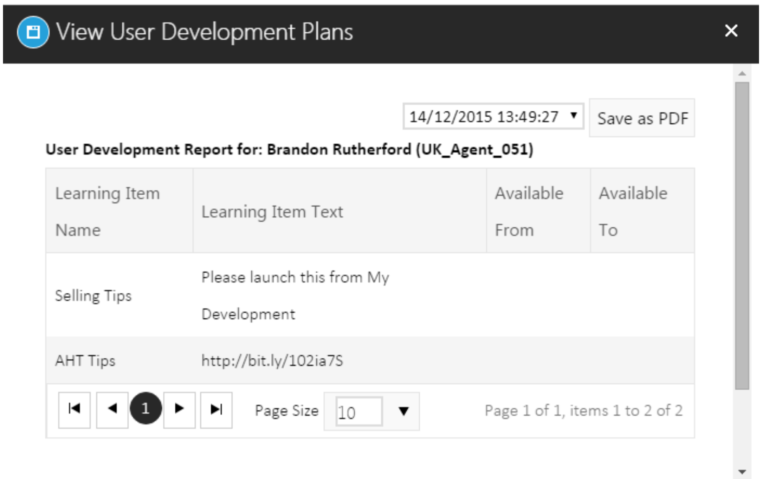


Figure 102: Viewing User Development Plans

Notes:

- Assigning learning items causes previously assigned learning items to be removed from the user's learning plan. It is possible to view previous learning plans from the Learning Items page by clicking the **View Users Development Plan(s)** link. A dialog box will appear. Click the **View** link for the chosen user to view their development plans. The dropdown box in the top right of the form will include all previous development plans which will then be displayed in the form's table and can be saved as PDF files.
- The Learning Item Auto-Assignment application creates learning plans for users in the same way as manual assignment of Learning Items.

14.8 Genesys EWM Learning Item Integration

Optimizer has an integration feature with Genesys WFM which allows learning items to be sent to agents in EWM. To enable this feature, go to the System Settings page in Optimizer and tick the EWM Enabled tickbox in the General Settings tab. Once this tickbox has been ticked an EWM Url Endpoint textbox will appear underneath it. Set the value of this textbox to the EWM Url Endpoint in your environment and click Save Changes.

Figure 103: EWM Integration

Once this setting has been enabled it will be possible to set learning items as EWM Enabled in the Learning Items page. Once a learning item has been enabled for EWM integration it will be sent to the corresponding Genesys agents in EWM as well as to the agent's account in Optimizer when it is assigned.

Notes:

- This feature requires that Genesys employee IDs match Optimizer users' Login IDs.
- To set up the EWM capture points and routing rules required for EWM, please see the EWM documentation.

15 Creating Feedback Assessments

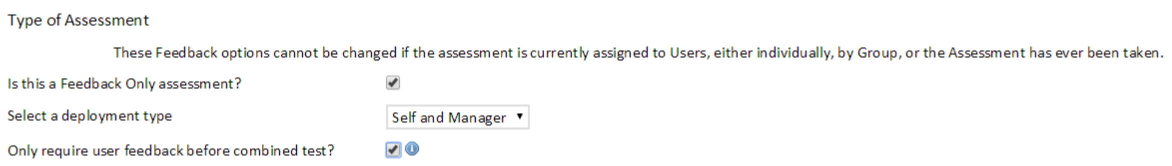
Feedback Assessments are used for providing rating and ranking responses only. They are created the same way as standard assessments, but there are unique settings and constraints which set them apart.

To create a feedback assessment, select '**Is this a Feedback Only Assessment?'** The option enables the settings for who will have access to the assessment in the feedback model; e.g. 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 that reports to him/her, 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 will prevent the manager from seeing the feedback assessment until it has been completed and submitted by the user. Once the user's feedback is submitted, the manager will get the option to create a combined feedback assessment without completing their own version of the feedback assessment first.

Figure 104: Self and manager feedback assessments



Both the Manager and User will see the Feedback Assessment listed in their My Development page. Managers can use the dropdown filters to display specific Assessment types.

After selecting the **Combined Feedback** filter, the assessment will be presented.

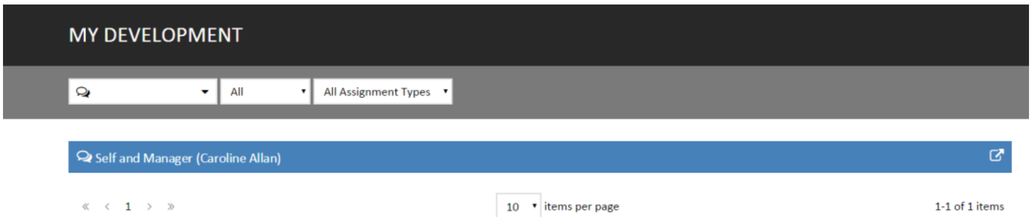


Figure 105: Viewing assessments using the 'feedback on other users' tab

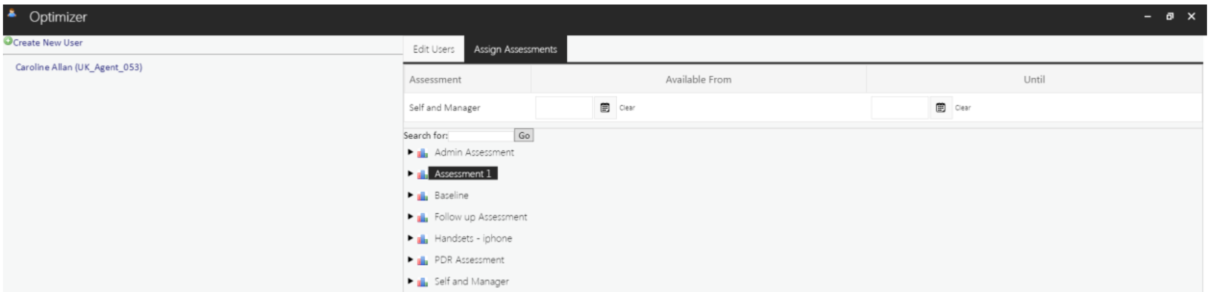
16 Email Notification Service

It is possible to set Optimizer 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 ‘**Optimizer 4.6.0 Email Messaging Service Installation Guide**’ document for instructions relating to the installation and configuration of this service.

17 Assigning Assessments to Individual Users

The option to assign an assessment to an individual is available in the User Detail window. After selecting an individual user, click on **Assign Assessments**.

Figure 106: Assigning assessments to individual users



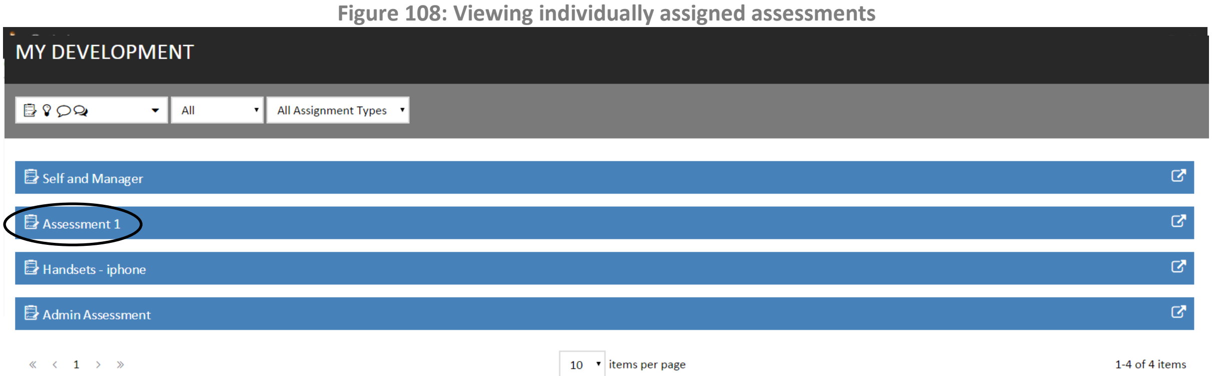
The assessments available for assignment are visible to select and assign to the user.

Right Click on the desired assessment and select **Add assessment to user**.

Figure 107: Assigning assessments to individual users

The individually assigned assessment will be visible on the user's **My Development** screen.

Figure 108: Viewing individually assigned assessments



18 Date Restrictions on Assessments

The **My Development** page displays the date that an assessment needs to be completed by (providing a date constraint was applied to the assessment and/or individual).

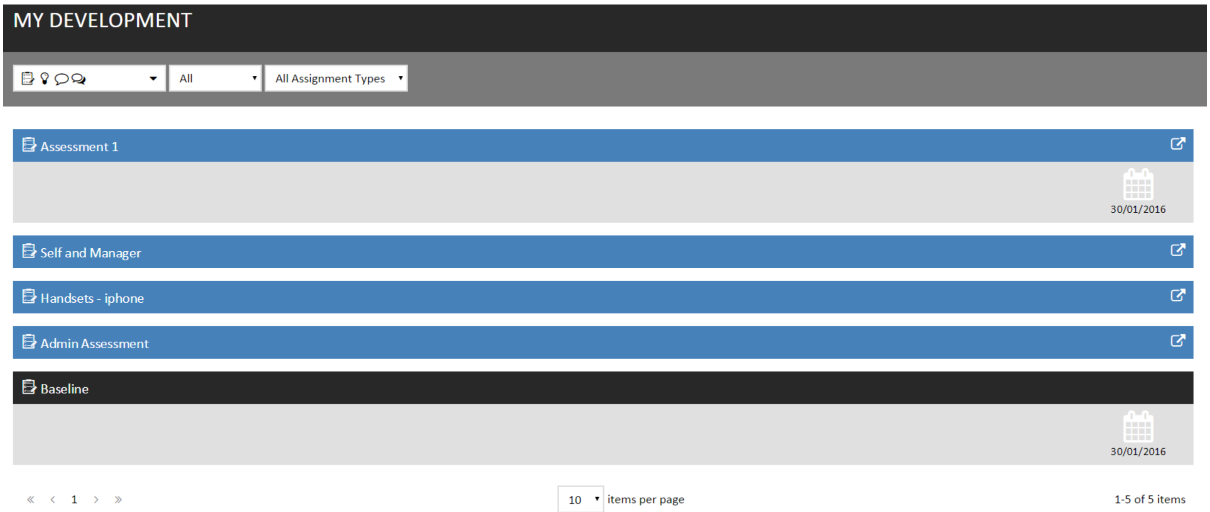


Figure 109: Deadline assessment dates

Assessments that have been assigned before the start date will appear at the bottom of the list as inactive. On the day of the start date the Assessment will move up the list and become active and ready for the user to launch.

19 Ability to Reset Multiple User Tests

User Assessments can be reset in the **Reset Tests** page (this page needs to be added to the relevant job roles).

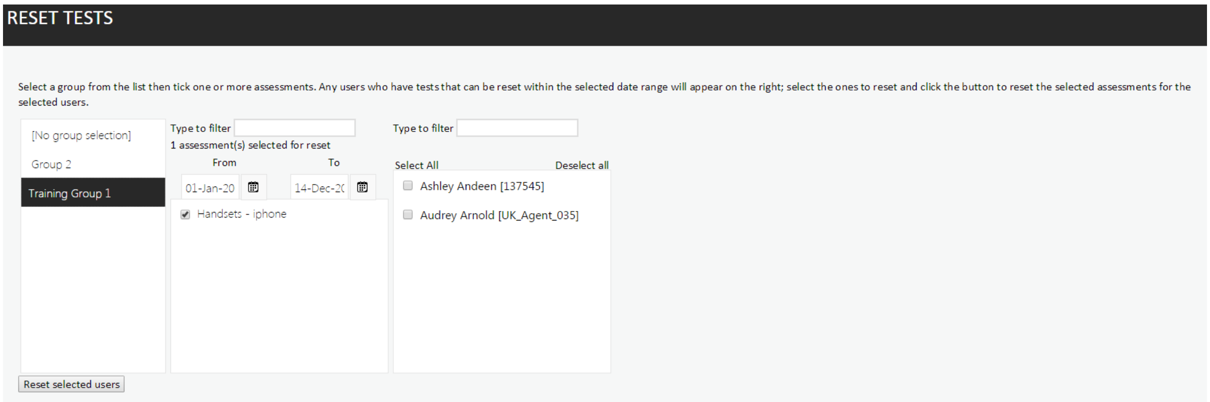


Figure 110: Resetting user assessments

Assessments can be reset by group or for an individual. The Group names will appear at the left hand side with the option of selecting the group or an individual within the group only.

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

Note: 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 assessments by name. 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 following example:

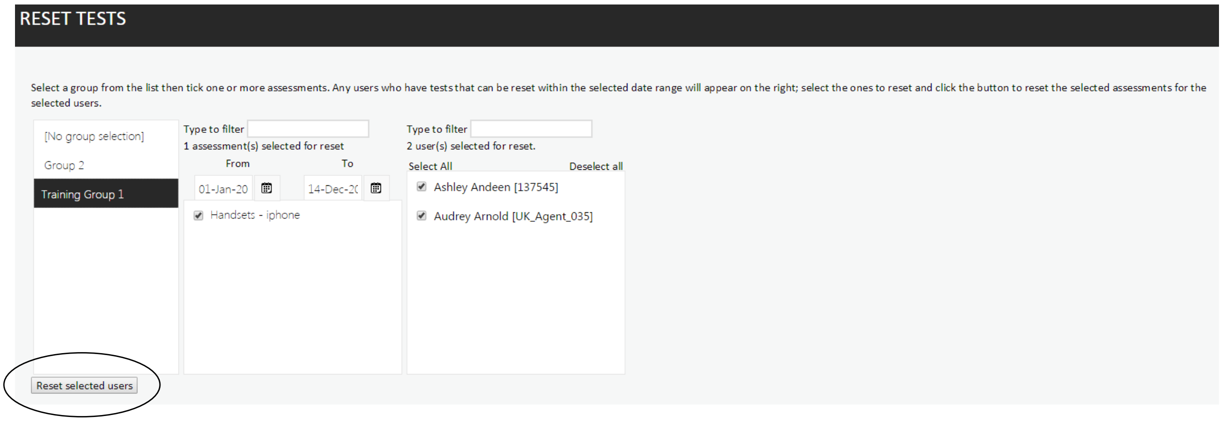


Figure 111: Resetting assessments for specific users

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

20 Create Customizable Certificates per Assessment

20.1 Creating Certificates

Go to the Certificates page. Any existing certificates will be visible. To create a new certificate, Click the **click here** text ment.

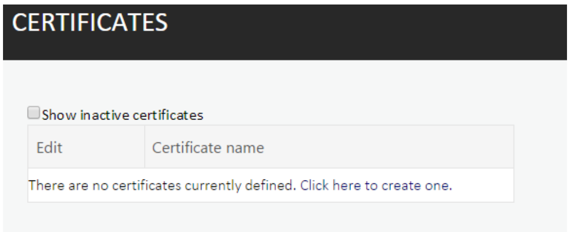
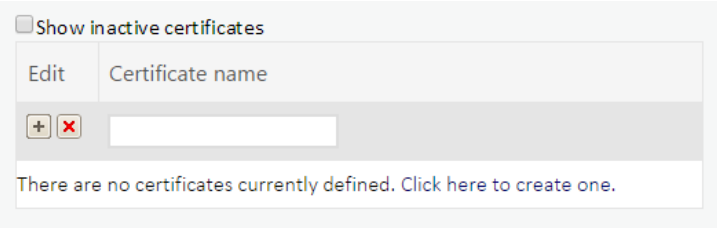


Figure 112: Creating new certificates

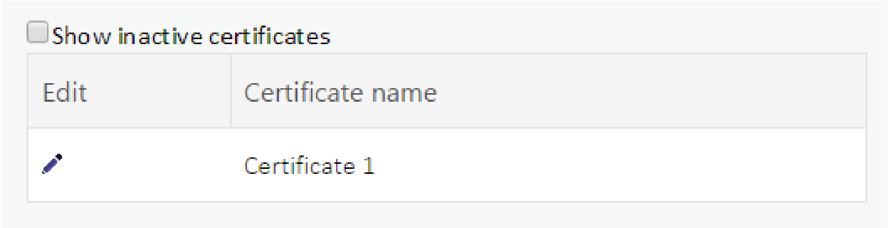
Enter a meaningfull name for the Certificate in the field provided. It is important that you name your certificate appropriately as you will need to assign this to individual assessments at a later date.

Figure 113: Setting certificate name



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

Figure 114: Saving certificate name



If you wish to rename the Certificate click the icon which will enable you to change the Certificate name.

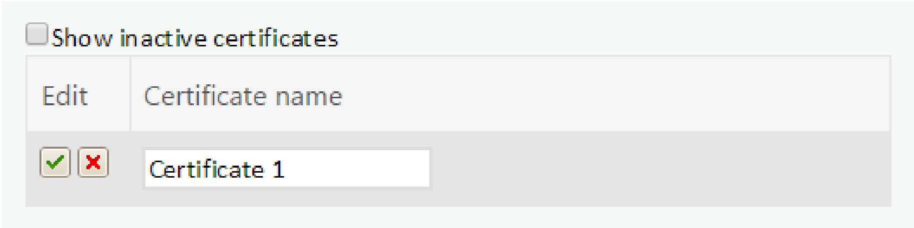
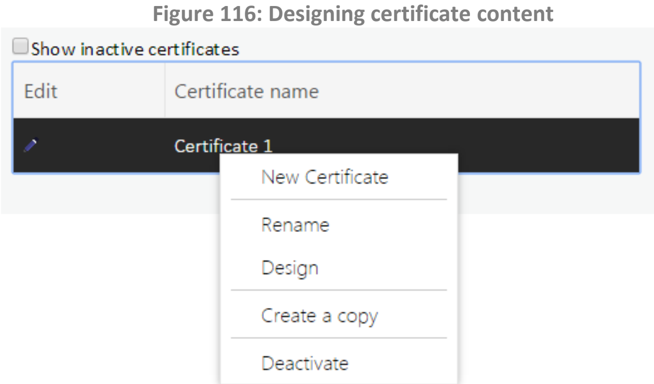


Figure 115: Confirming changes to certificate details

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

To design the content within the Certificate, right click on the certificate name and select **Design** from the drop down options. (You will notice that you can also rename existing and create new Certificates from this menu as well.

Figure 116: Designing certificate content



After selecting **Design** you will be presented with a blank page containing the **toolbox**.

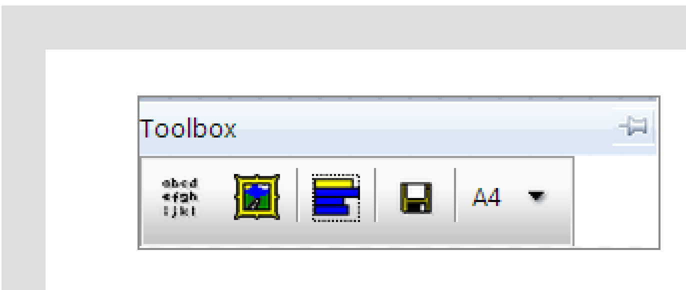


Figure 117: Designing certificate content

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

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

20.2 Adding Text to a certificate

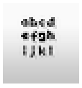


Figure 118: Certificate design toolbox

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

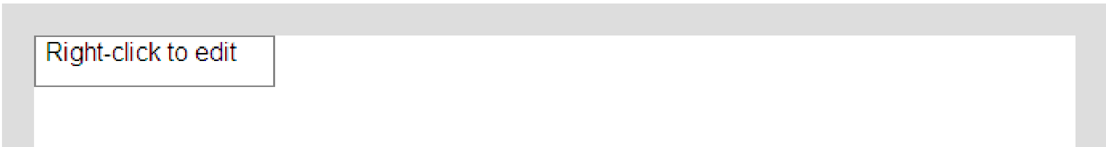


Figure 119: Adding text to a certificate

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

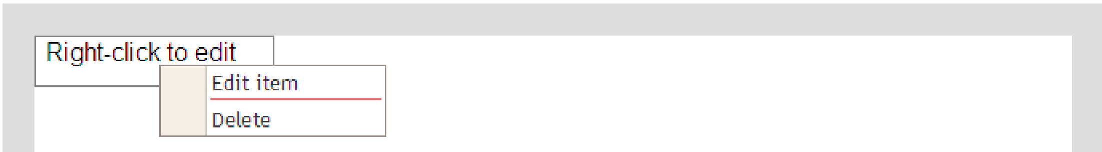


Figure 120: Text editing menu

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

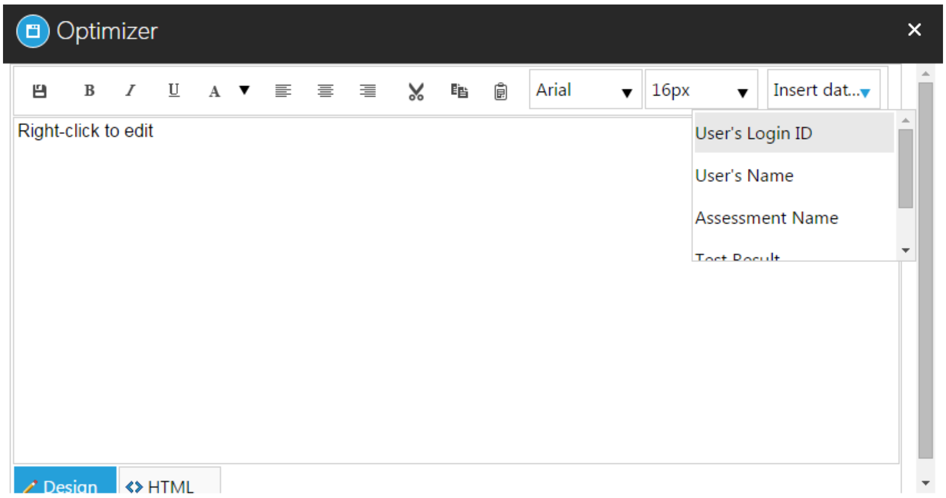


Figure 121: Editing certificate text

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

If you wish to add elements of dynamic text, such as the name of the Assessment or User, 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 satisfied with your text press the  icon. This will add your text to the certificate. In most cases you will need to resize the box to accommodate your text. To do this, click on the right hand corner of the text box (the icon will change to a double pointed arrow) and you can drag to resize.

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

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

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

You can add multiple text boxes within your certific.

20.3 Adding an image to your certificate

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

Figure 122: Replacing and deleting certificate images

Select **Replace image.**

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

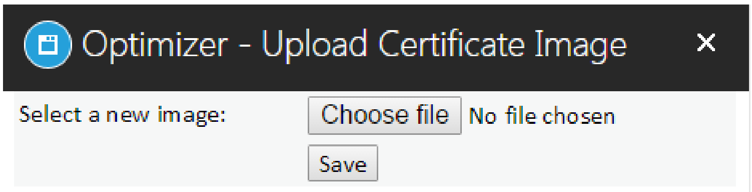
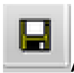
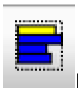


Figure 123: Browsing for replacement images

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

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

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

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

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

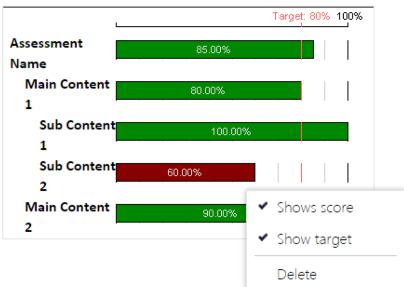


Figure 124: Adding a results graph to a certificate

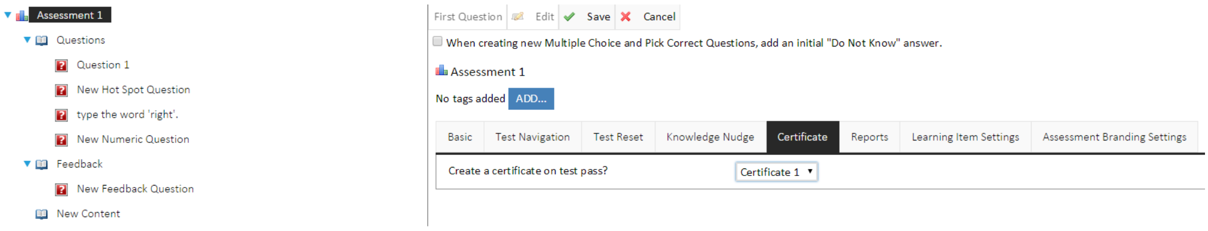
Once you are satisfied with your certificate ensure that it is saved and then close down the designer window. By default your certificate is now available to be attached to any existing or new assessments.

To remove a certificate, right click on the certificate name and select **deactivate**.

20.4 Assigning your certificate to an assessment

The option to assign a certificates to an assessment is located in the Assessment properties.

Figure 125: Assigning a certificate to an assessment



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

This setting 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.

20.5 Recalling Awarded Certificates

If a user has achieved the required pass mark, the certficate will be presented automatically upon completion and can be printed, if necessary, 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 user's **My Certificate** page for viewing at any time.

A list of assessments that the user has successfully completed is visible in the **My Certificate** page. To view a certificate, 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 and prepare it for printing.

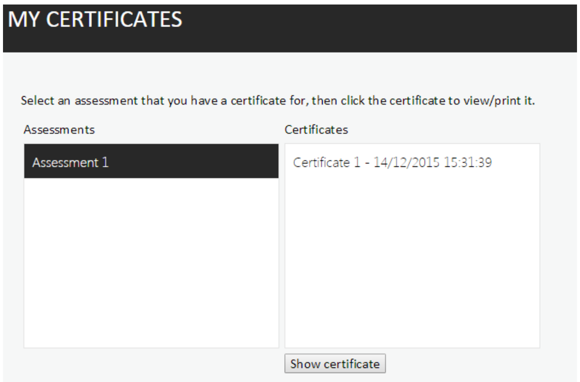


Figure 126: Viewing certificates

21 Reports

21.1 Feedback Results Report

The Feedback Results Report displays a comparison of feedback assessment answers. To generate a report, select a date range at the top of the page to filter the list of assessments available for selection, then select a user from the hierarchy and one of the user's feedback assessments from the bottom-left of the screen. Click the 'Rebuild report' button to generate the report.

The resulting graph will display the possible answers for each question with a line showing the answers chosen by the user and their manager (if the assessment has also been taken by the manager).

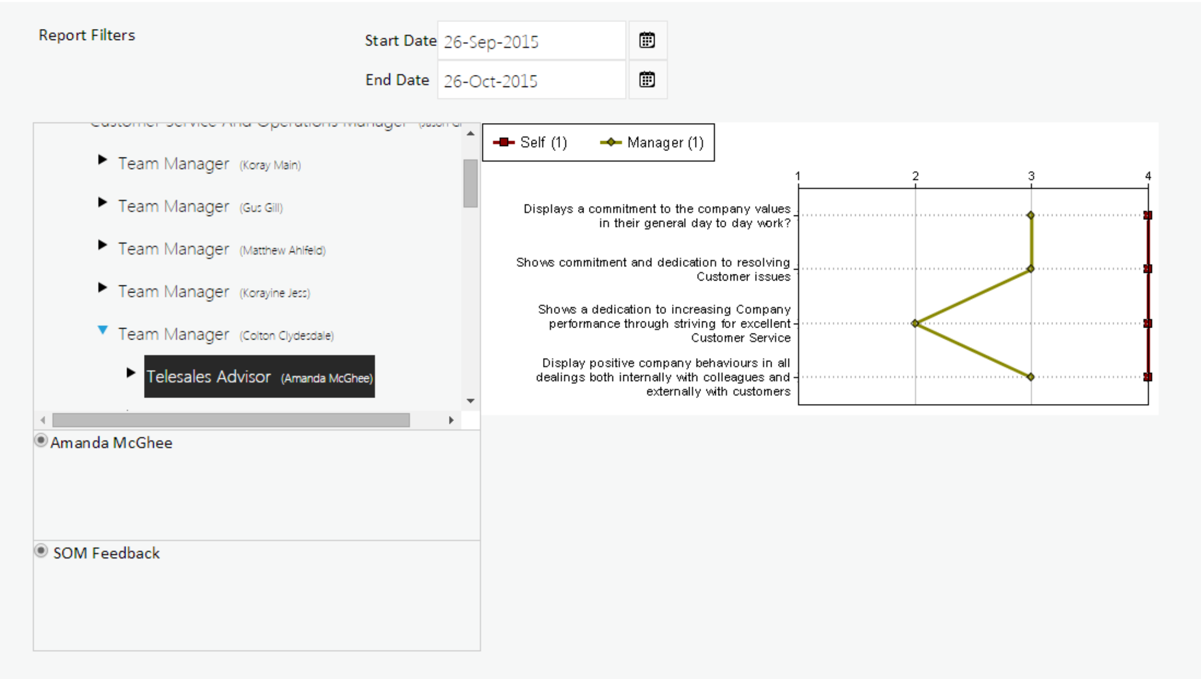


Figure 127: Feedback results report

21.2 Knowledge Nudge Reports

Select the **Knowledge Nudge Report** (location of this report depends on application setup settings; default location is under the **Reports** tab).

Select a user (**Note**: available user information will depend on where the individual is situated in the hierarchy).

In the following example the user has been selected by **selected position only** but users may also be selected in the **hierarchy**.

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

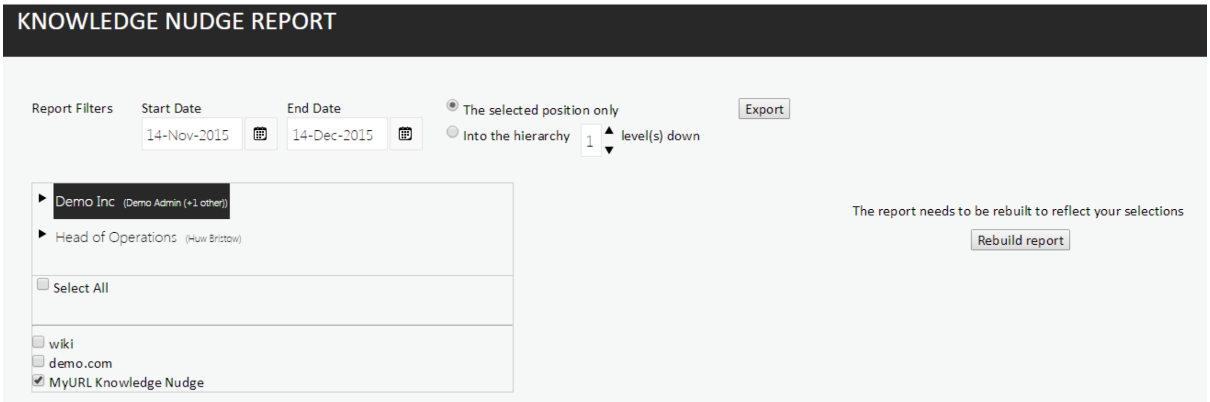


Figure 128: Knowledge nudge report

Click on **Rebuild Report**.

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

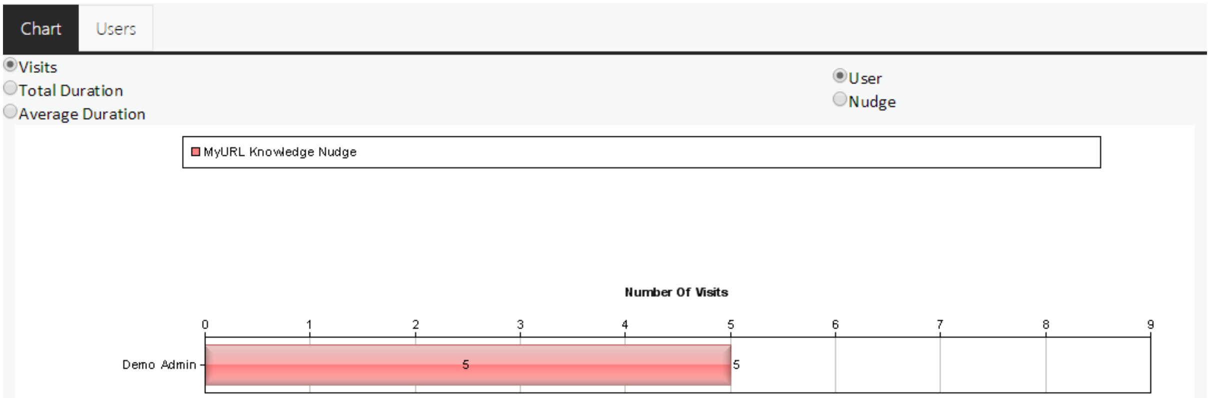


Figure 129: Nudge report information and options

21.3 Assessment Report

Select **User Results Reports** from the **Reporting** section to view Assessment results. Based on the user's position within the hierarchy, the **User Results Report** can be run for a whole site, department, team or individual.

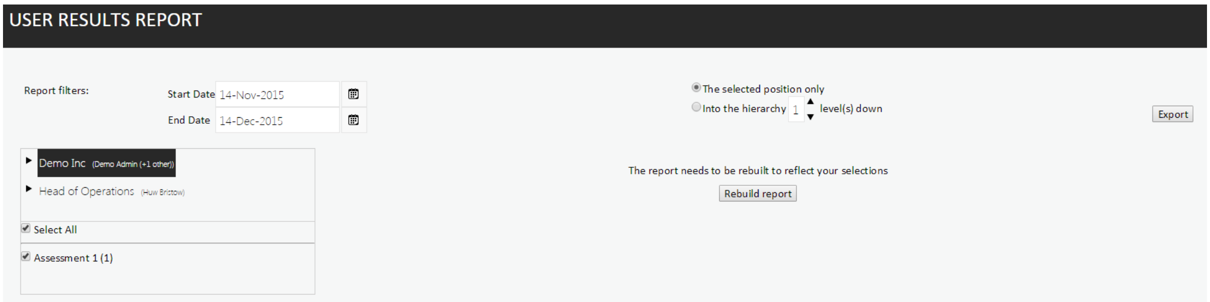


Figure 130: Viewing assessment reports by individual or team

- Select required date range.

- From the hierarchy view select the hierarchy level or individual.
- Select the assessments from the bottom left hand window. These are all of the assessments that the individual has completed.
- Click on **Rebuild report** to view the results.

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

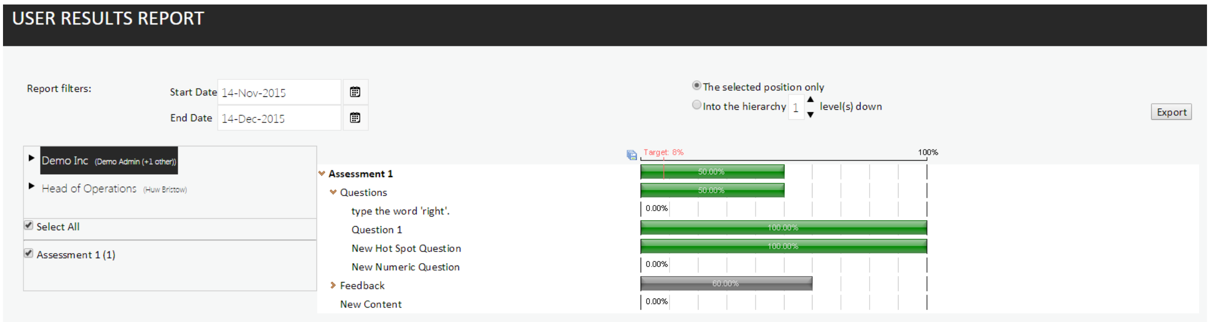


Figure 131: Detailed assessment results

Right-click on a question to **View Detail** about a question.

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 members with their respective answers.

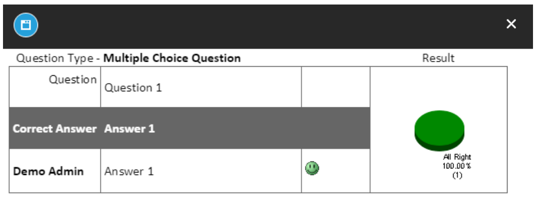


Figure 132: Viewing question detail and provided answers

Click on the **select for export** button and then click on **Export** to export the data into an Excel spreadsheet.

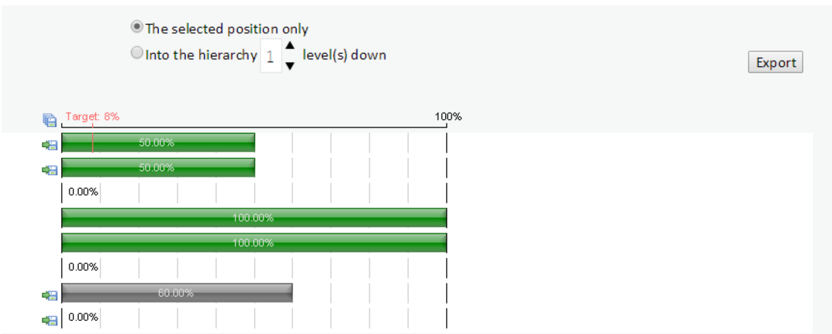


Figure 133: Exporting assessment details

Click on the disk icon to select the level of data that you want to export. After selecting your required level of data aggregation click on the Export button to download the data as a CSV file.

21.4 Feedback Report

Users can be selected at a hierarchy level or individually within the hierarchy structure.

Using the date range will filter the feedback assessments that the individual has completed in the bottom left hand window. Select the specific assessment and click on **Rebuild report**.

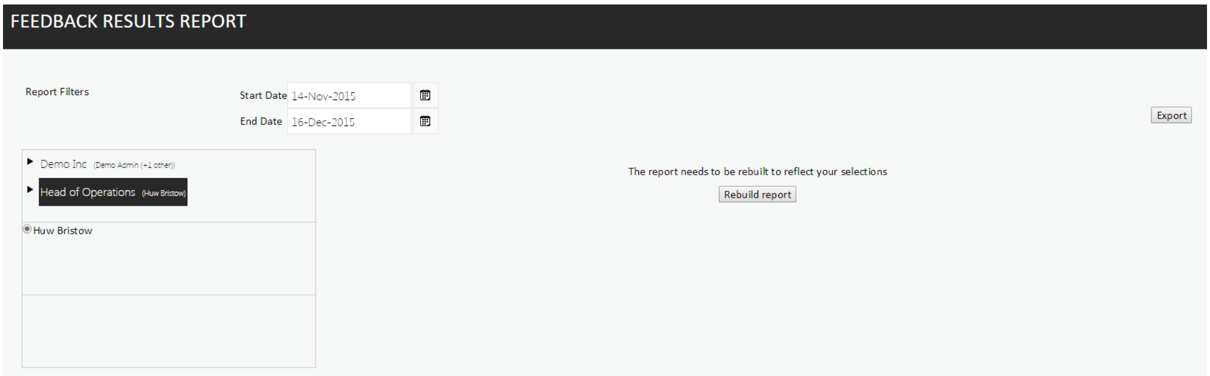


Figure 134: Rebuilding feedback reports

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

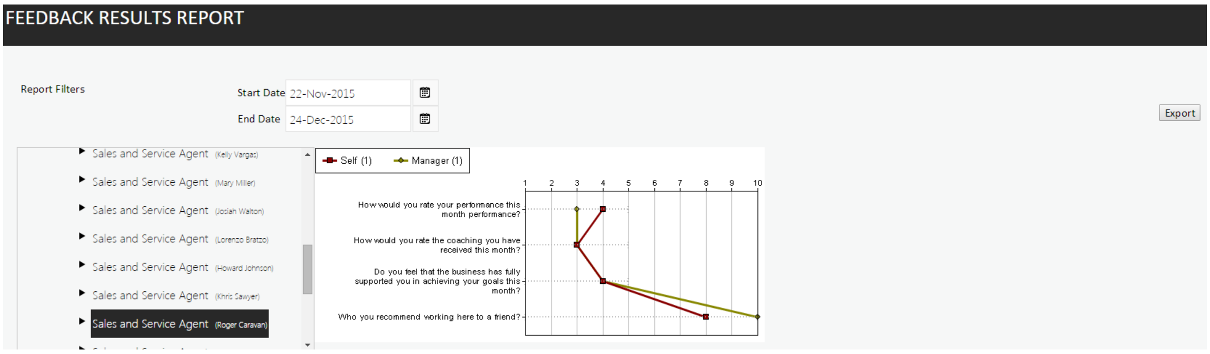


Figure 135 Feedback Results

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.

21.5 Admin Reports

To access the Admin Reports select the Admin Reports page and a window similar to the one below will be visible.

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.

21.6 User Result Detail

Select the **User Result Detail** report from the drop down box at bottom of the Admin Reports screen**.**

Next, click on **Create Report**.

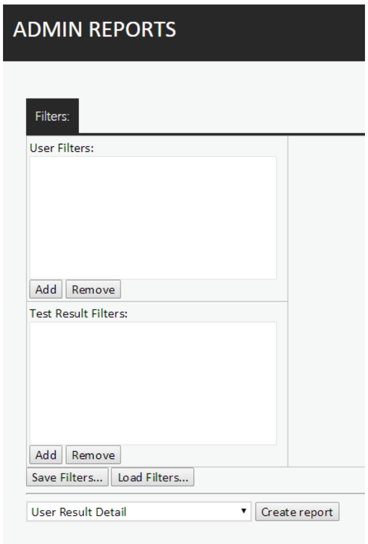


Figure 136: User result detail report

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

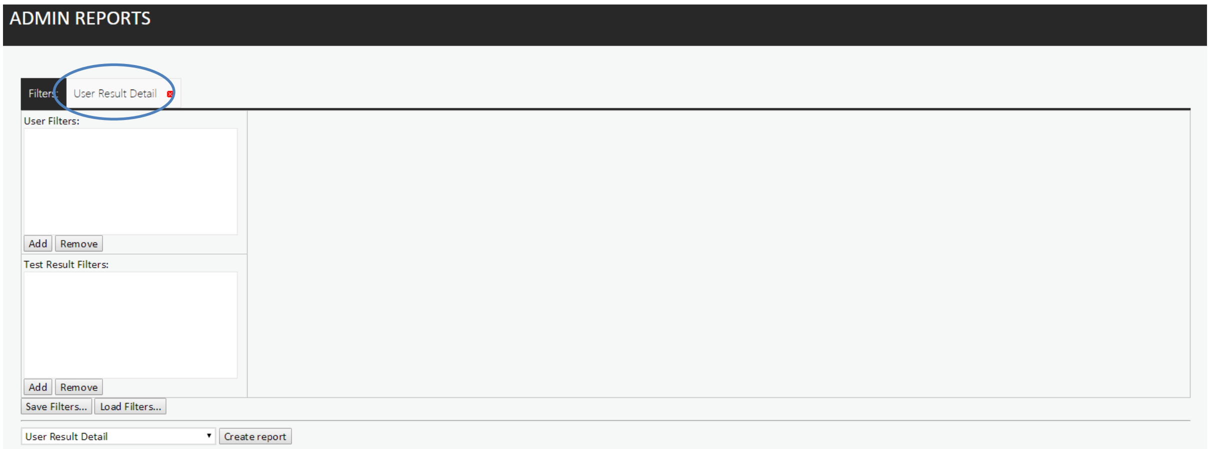


Figure 137: User result detail report

The option to select a specific assessment from the available assessments is visible after selecting the report.

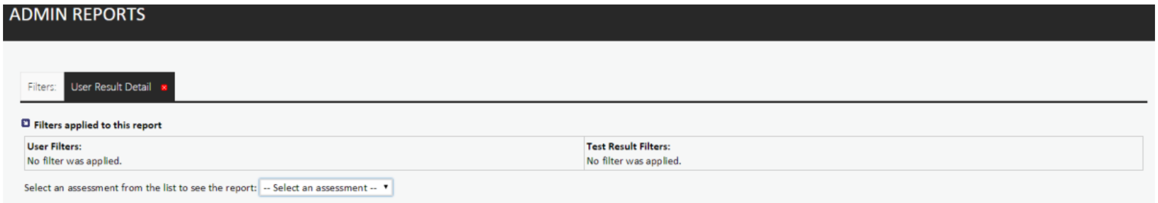
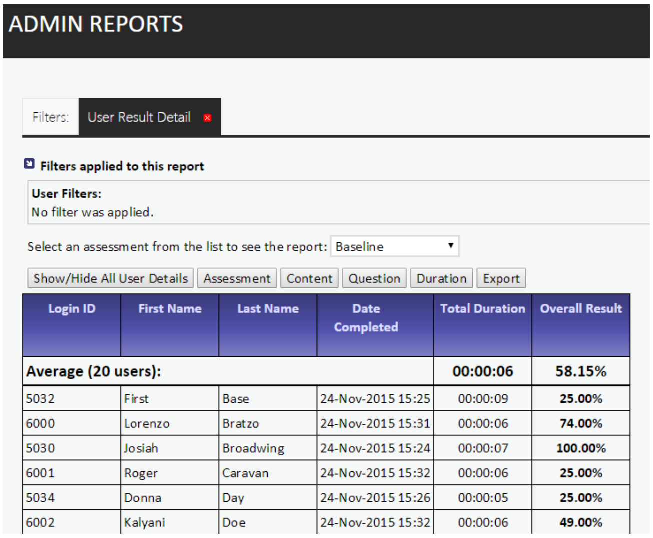


Figure 138: Selecting an assessment for the report

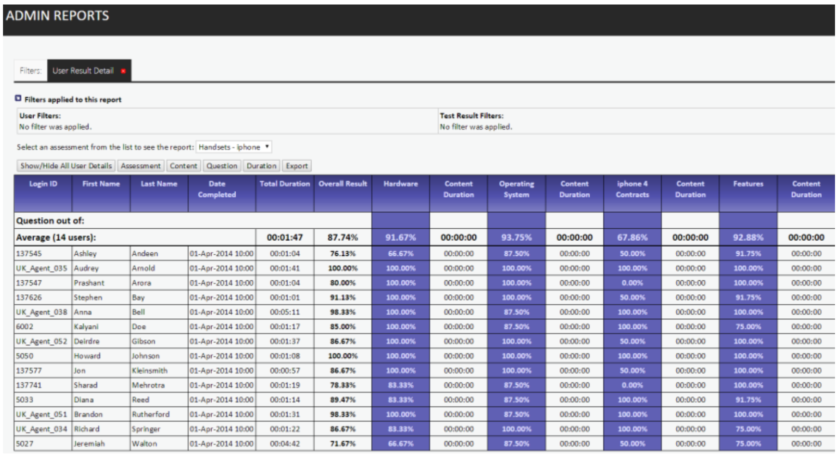
The data can then be expanded to Content and Question level with the option to Export into Excel. Click on the relevant buttons to expand the data.



Login ID	First Name	Last Name	Date Completed	Total Duration	Overall Result
Average (20 users):				00:00:06	58.15%
5032	First	Base	24-Nov-2015 15:25	00:00:09	25.00%
6000	Lorenzo	Bratzo	24-Nov-2015 15:31	00:00:06	74.00%
5030	Josiah	Broadwing	24-Nov-2015 15:24	00:00:07	100.00%
6001	Roger	Caravan	24-Nov-2015 15:32	00:00:06	25.00%
5034	Donna	Day	24-Nov-2015 15:26	00:00:05	25.00%
6002	Kalyani	Doe	24-Nov-2015 15:32	00:00:06	49.00%

Figure 139: Expanding report detail

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



Login ID	First Name	Last Name	Date Completed	Total Duration	Overall Result	Hardware	Content Duration	Operating System	Content Duration	iphone 4 Contracts	Content Duration	Features	Content Duration
Question out of:													
Average (14 users):				00:01:47	87.74%	91.67%	00:00:00	93.75%	00:00:00	67.86%	00:00:00	92.88%	00:00:00
137545	Ashley	Andeen	01-Apr-2014 10:00	00:01:04	76.13%	66.67%	00:00:00	87.50%	00:00:00	50.00%	00:00:00	91.75%	00:00:00
UK_Agent_035	Audrey	Arnold	01-Apr-2014 10:00	00:01:41	100.00%	100.00%	00:00:00	100.00%	00:00:00	100.00%	00:00:00	100.00%	00:00:00
137547	Prashant	Arora	01-Apr-2014 10:00	00:01:04	80.00%	100.00%	00:00:00	100.00%	00:00:00	0.00%	00:00:00	100.00%	00:00:00
137626	Stephen	Bay	01-Apr-2014 10:00	00:01:01	91.13%	100.00%	00:00:00	100.00%	00:00:00	50.00%	00:00:00	91.75%	00:00:00
UK_Agent_038	Anna	Bell	01-Apr-2014 10:00	00:05:11	98.33%	100.00%	00:00:00	87.50%	00:00:00	100.00%	00:00:00	100.00%	00:00:00
6002	Kalyani	Doe	01-Apr-2014 10:00	00:01:17	85.00%	100.00%	00:00:00	87.50%	00:00:00	100.00%	00:00:00	75.00%	00:00:00
UK_Agent_052	Deirdre	Gibson	01-Apr-2014 10:00	00:01:37	86.67%	100.00%	00:00:00	100.00%	00:00:00	50.00%	00:00:00	100.00%	00:00:00
5050	Howard	Johnson	01-Apr-2014 10:00	00:01:08	100.00%	100.00%	00:00:00	100.00%	00:00:00	100.00%	00:00:00	100.00%	00:00:00
137577	Jon	Kleinsmith	01-Apr-2014 10:00	00:00:57	86.67%	100.00%	00:00:00	100.00%	00:00:00	50.00%	00:00:00	100.00%	00:00:00
137741	Sharad	Mehrotra	01-Apr-2014 10:00	00:01:19	78.33%	83.33%	00:00:00	87.50%	00:00:00	0.00%	00:00:00	100.00%	00:00:00
5033	Diana	Reed	01-Apr-2014 10:00	00:01:14	89.47%	83.33%	00:00:00	87.50%	00:00:00	100.00%	00:00:00	91.75%	00:00:00
UK_Agent_051	Brandon	Rutherford	01-Apr-2014 10:00	00:01:31	98.33%	100.00%	00:00:00	87.50%	00:00:00	100.00%	00:00:00	100.00%	00:00:00
UK_Agent_034	Richard	Springer	01-Apr-2014 10:00	00:01:22	86.67%	83.33%	00:00:00	100.00%	00:00:00	100.00%	00:00:00	75.00%	00:00:00
5027	Jeremiah	Walton	01-Apr-2014 10:00	00:04:42	71.67%	66.67%	00:00:00	87.50%	00:00:00	50.00%	00:00:00	75.00%	00:00:00

Figure 140: Question and content duration

21.7 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. In the example below the options are – Hierarchy, User Field & Group.

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

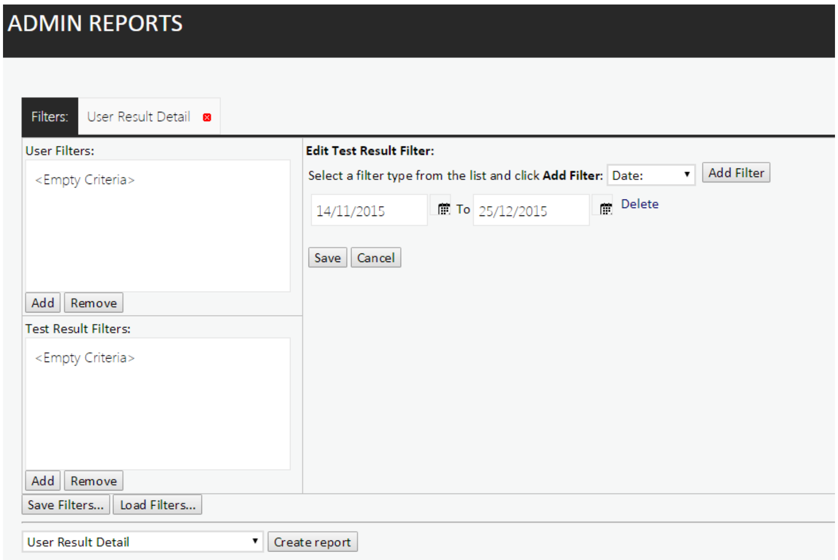


Figure 141: Using report filters

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

Select the additional filter.

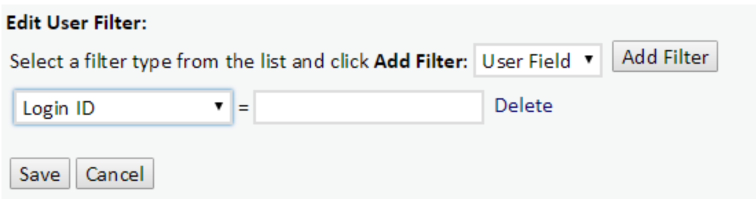


Figure 142: Adding additional filters

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

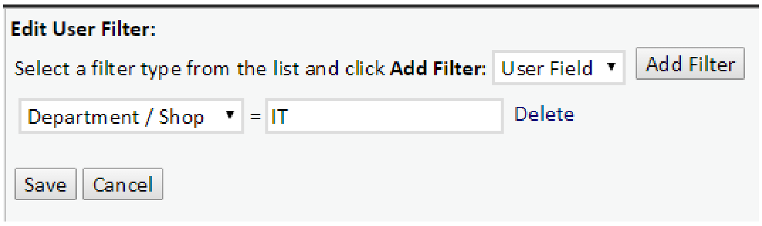


Figure 143: Adding a Department Filter

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

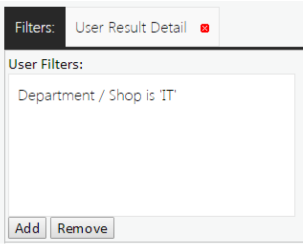


Figure 144: Saving filter options

Additional **Test Result Filters** can also be created.

Click on the **Add** button under the **Test Result Filters** box.

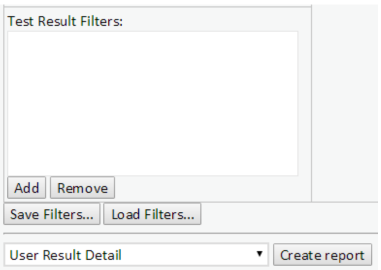


Figure 145: adding test result filters

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

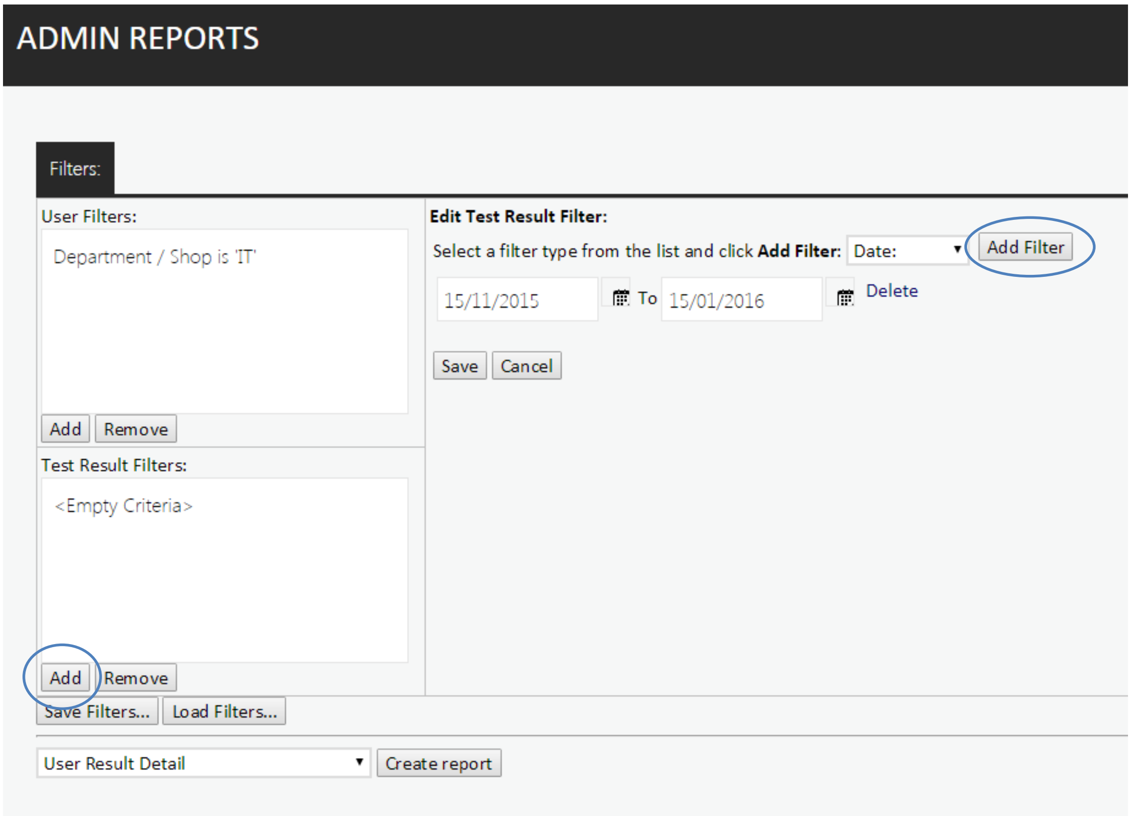


Figure 146: Selecting a test result filter

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

Test Result filter as per the example below.

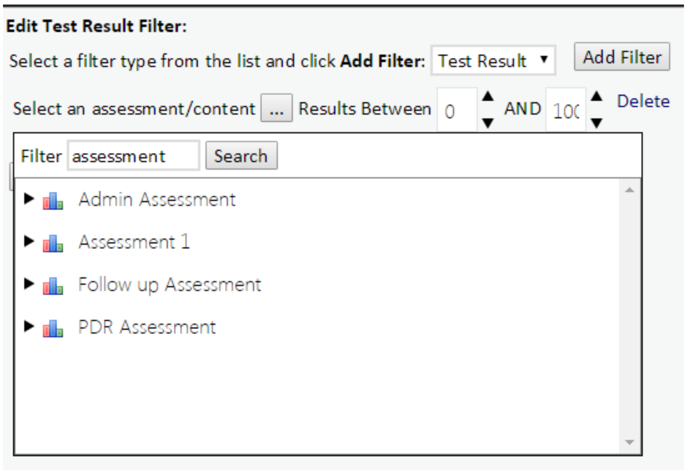


Figure 147: Test result filter options

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

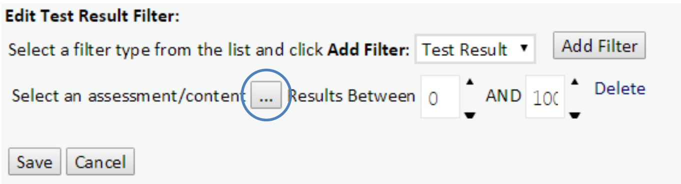


Figure 148: Saving an assessment with an associated filter

Click on the … button to open the Assessment Search window.

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

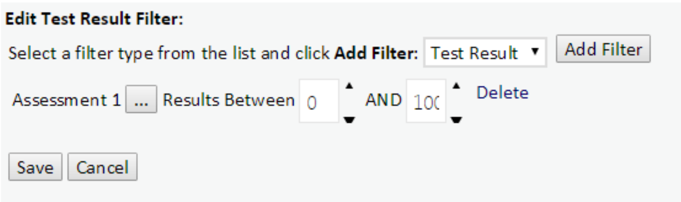


Figure 149: Saving an assessment with an associated filter

Selecting the **Date** filter enables you to filter Test results by date range.

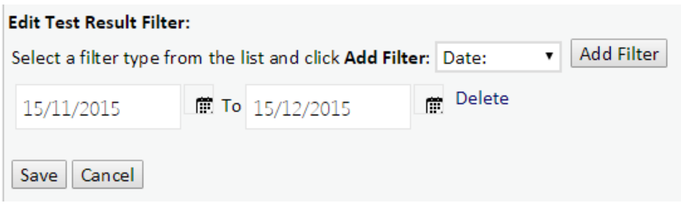


Figure 150: Saving the date filter

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

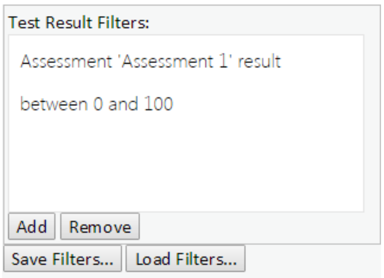


Figure 151: Display of a saved filter

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

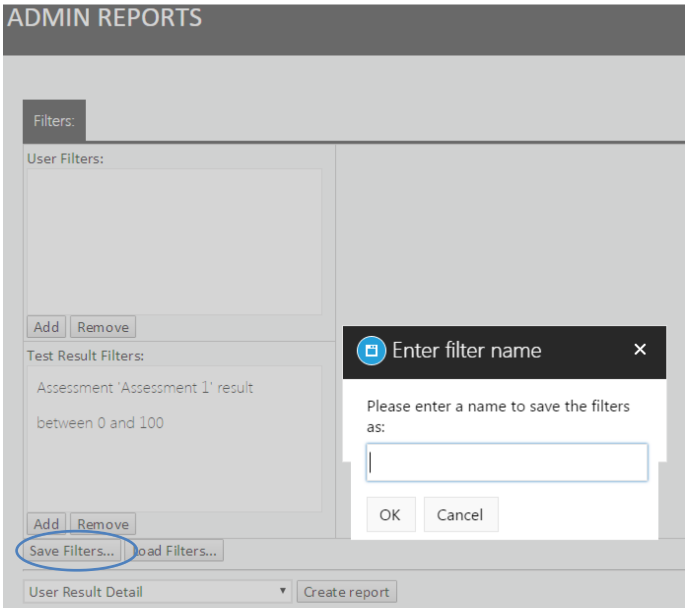


Figure 152: Saving filters

A Notification screen will appear once the filter has been changed.

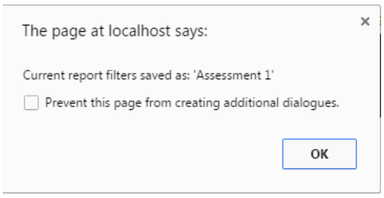


Figure 153: Filter update notification

21.8 Loading Report Filters

Filters are enabled for use and selection by clicking on **Load Filters**. The available saved filters are presented. Highlight the desired filter and then click on **Select**.

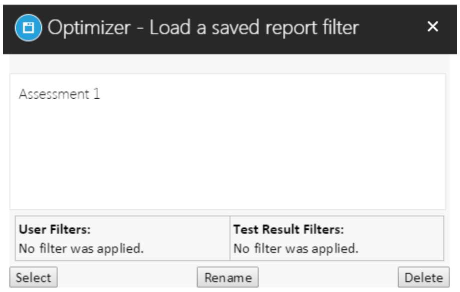


Figure 154: Loading saved filters

The filter then appears in the relevant filter box.

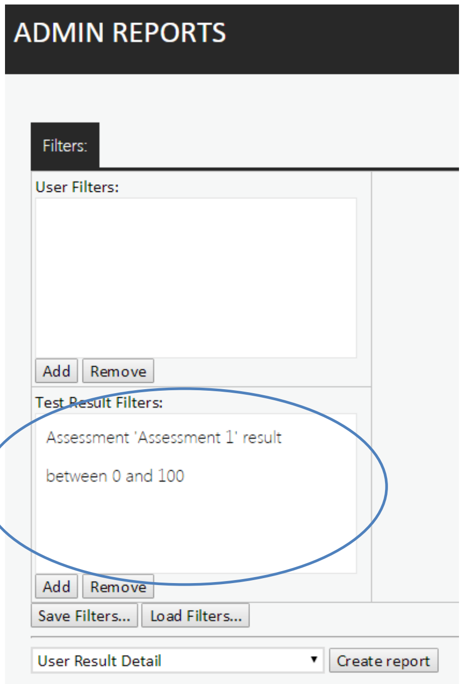
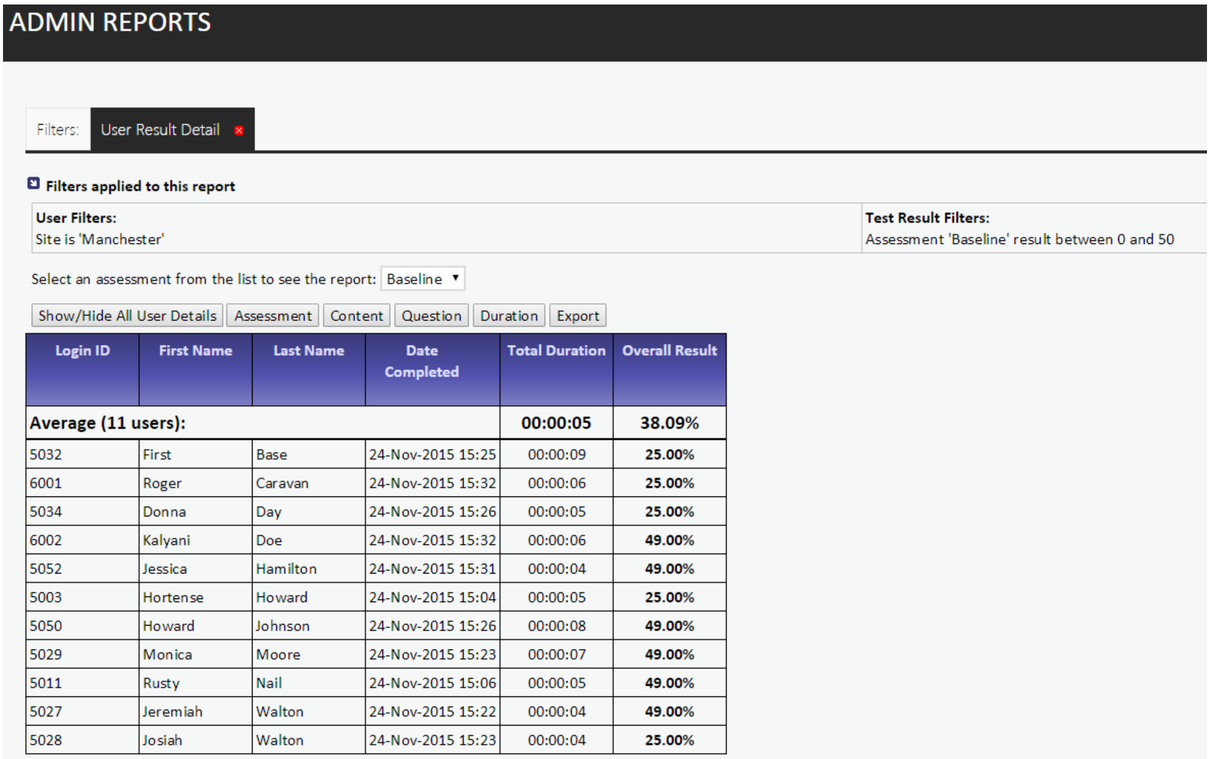


Figure 155: Display of selected filters

Select the report type (e.g. **User Results Detail**). The filter information will appear as part of the report selection after clicking on the report at the top of the screen:



Login ID	First Name	Last Name	Date Completed	Total Duration	Overall Result
Average (11 users):				**00:00:05**	**38.09%**
5032	First	Base	24-Nov-2015 15:25	00:00:09	**25.00%**
6001	Roger	Caravan	24-Nov-2015 15:32	00:00:06	**25.00%**
5034	Donna	Day	24-Nov-2015 15:26	00:00:05	**25.00%**
6002	Kalyani	Doe	24-Nov-2015 15:32	00:00:06	**49.00%**
5052	Jessica	Hamilton	24-Nov-2015 15:31	00:00:04	**49.00%**
5003	Hortense	Howard	24-Nov-2015 15:04	00:00:05	**25.00%**
5050	Howard	Johnson	24-Nov-2015 15:26	00:00:08	**49.00%**
5029	Monica	Moore	24-Nov-2015 15:23	00:00:07	**49.00%**
5011	Rusty	Nail	24-Nov-2015 15:06	00:00:05	**49.00%**
5027	Jeremiah	Walton	24-Nov-2015 15:22	00:00:04	**49.00%**
5028	Josiah	Walton	24-Nov-2015 15:23	00:00:04	**25.00%**

Figure 156: Viewing filtered report information

21.9 User Feedback Response Percentages

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

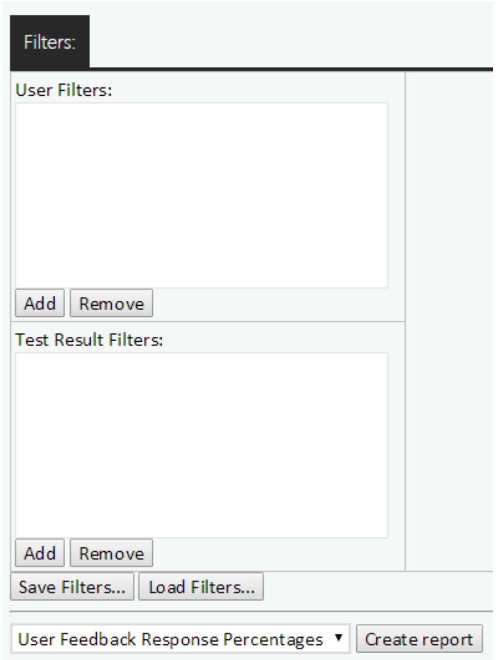


Figure 157: Creating a user feedback response percentages report

The report will appear at the top next to the **Filters**.

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

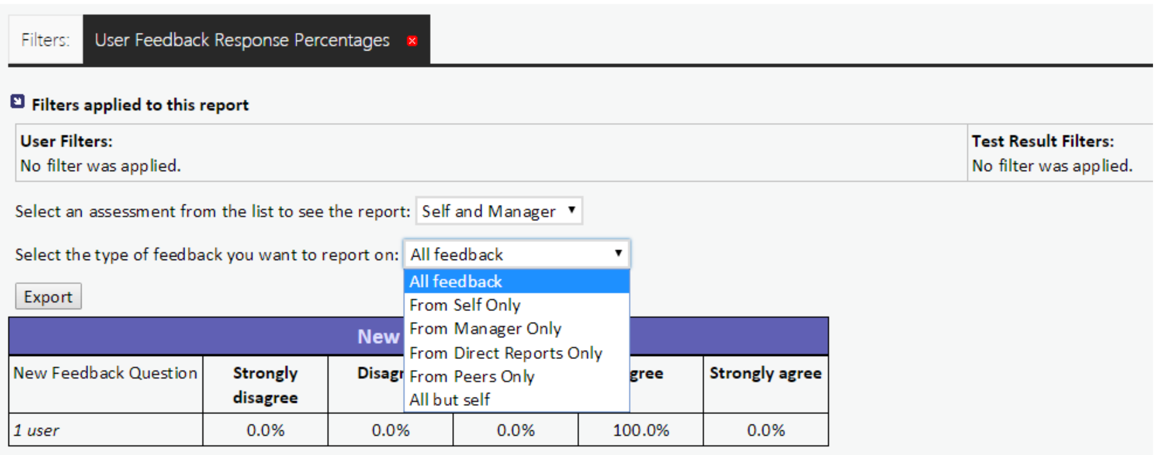


Figure 158: Selecting the report's assessment and feedback type

21.10 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 may be used to reduce the volume of answers).

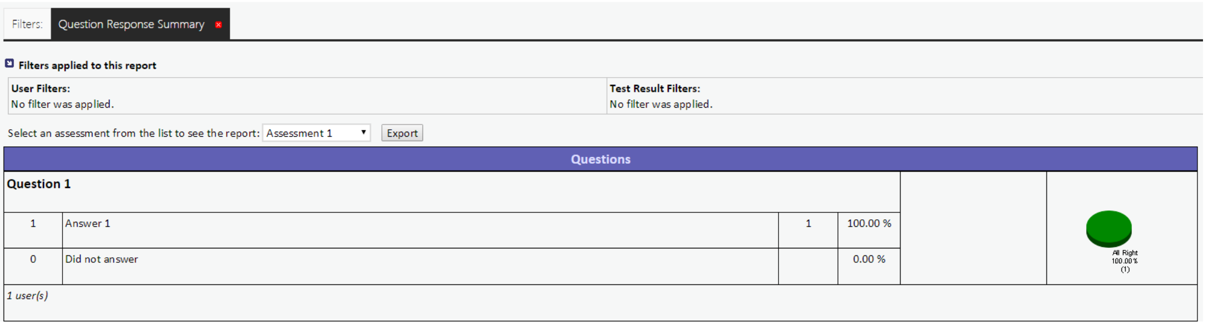


Figure 159: Selecting an assessment for the Question Response Summary Report

Results from this report can be exported to a PDF file. This can be done by selecting a report from the dropdown and clicking the **Export** button.

21.11 Admin Report User Filter – Hierarchy

You can use the organisational hierarchy as a filter within the Admin report by selecting the **Add Filter** button under the **Edit User Filter** section of the **Admin Reports** page.

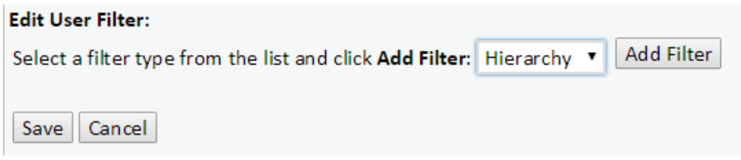


Figure 160: Using the organisational hierarchy as a filter

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

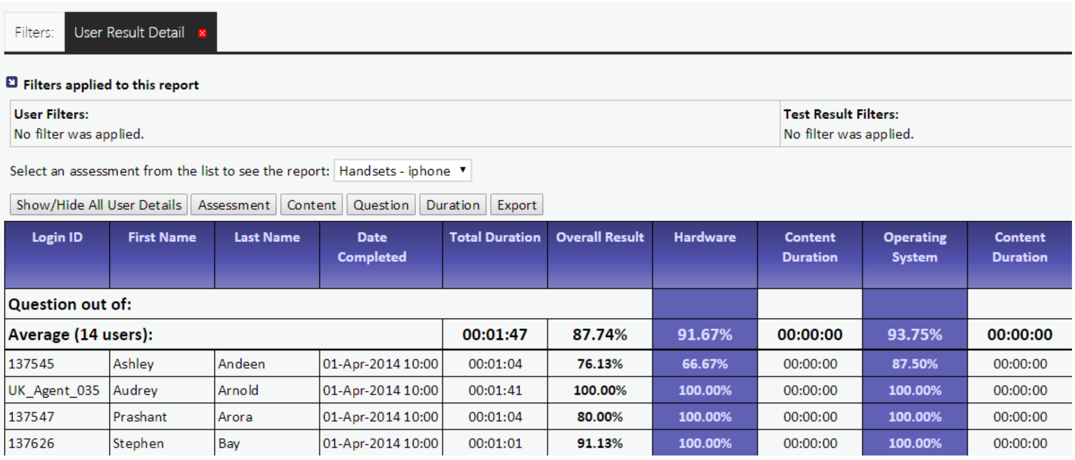
Figure 161: Using the organisational hierarchy as a filter

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

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

21.12 Duration Column within the User Result Detail Report

Duration of time spent (overall and by content) on an assessment is included within the **User Result Detail** admin report. This report also includes the overall average duration of for all selected users.



Login ID	First Name	Last Name	Date Completed	Total Duration	Overall Result	Hardware	Content Duration	Operating System	Content Duration
Question out of:									
Average (14 users):				00:01:47	87.74%	91.67%	00:00:00	93.75%	00:00:00
137545	Ashley	Andeen	01-Apr-2014 10:00	00:01:04	76.13%	66.67%	00:00:00	87.50%	00:00:00
UK_Agent_035	Audrey	Arnold	01-Apr-2014 10:00	00:01:41	100.00%	100.00%	00:00:00	100.00%	00:00:00
137547	Prashant	Arora	01-Apr-2014 10:00	00:01:04	80.00%	100.00%	00:00:00	100.00%	00:00:00
137626	Stephen	Bay	01-Apr-2014 10:00	00:01:01	91.13%	100.00%	00:00:00	100.00%	00:00:00

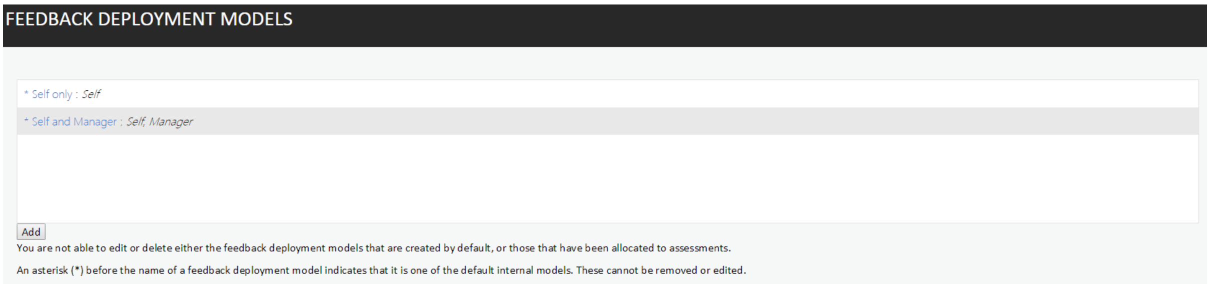
Figure 162: Duration column within the user result detail report

21.13 Feedback Deployment Models

This page allows the creation of feedback models which may be selected as part of the properties option of an assessment.

I In the example below, the standard feedback models (Self and Self & Manager) are available.

Figure 163: Feedback Deployment Models



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

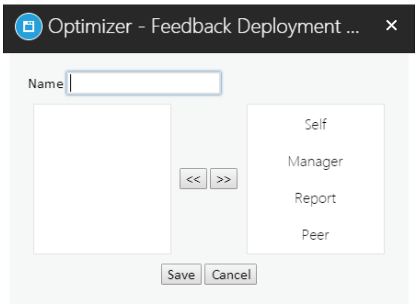


Figure 164: Creating feedback models

To create a new feedback model, select the desired options (individuals who will have access to the assessment) and move them across to the left hand box.

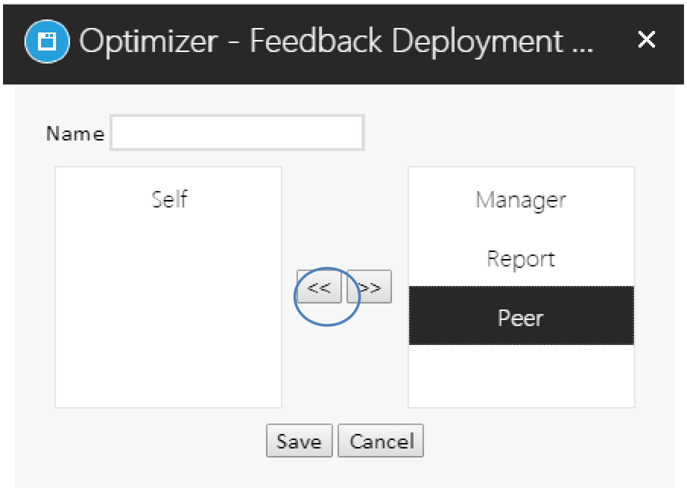


Figure 165: Selecting a feedback model

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

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

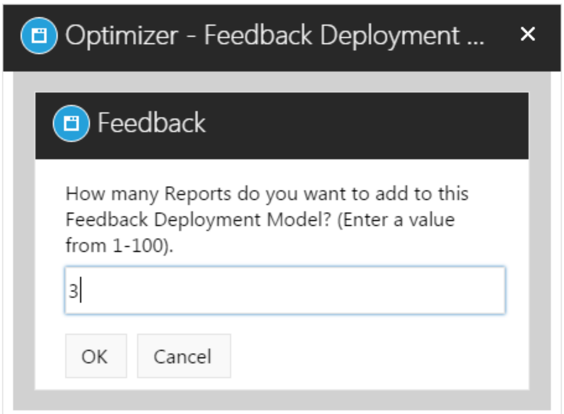


Figure 166: Setting the number of required reports

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

22 Managing and Viewing Crystal Reports

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

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

22.1 Managing Report Settings

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

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

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

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

22.2 Managing Reports

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

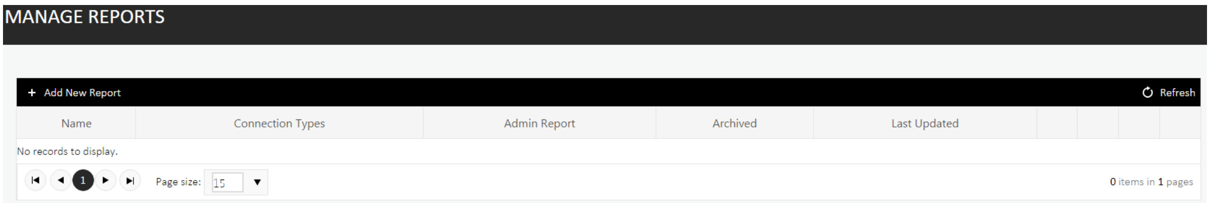


Figure 167: Manage Reports Page

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

Once the upload has completed, two additional settings will need to be defined. The connection type checkboxes should be used to set which users you want the report to run against. It is possible for a report to run against Optimizer, Planner and DNA users, and any combination of the three different databases. The second option should be used to map the report database to the name of the database used for your system. After entering these settings click the 'Add' button to complete the report upload.

Note: In certain cases it is possible for users to upload Crystal Report files to the web server without completing the setup of the report item in Optimizer. This will result in the report file being retained by the server; however, it will not be accessible via Optimizer. These files will be prefixed with

‘TEMPFILE’ and may be manually deleted from the server’s Crystal Reports upload folder by administrators.

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

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

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

22.3 Viewing Reports

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

22.4 Restricting Report Results

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

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

23 Skillsroute

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

The prerequisites are:-

GIS 7.5 & CME 7.5 on the server.

Select the Skillsroute page, as shown in the example below.

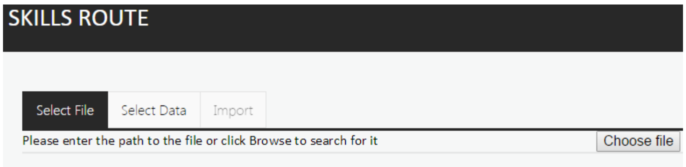


Figure 168: Selecting the Skillsroute page

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

Figure 169: Select a spreadsheet for data import

The spreadsheet must be created in the format as per the example below and be in Excel 97 – 2003 format file (.xls). The actual format of the information (skill names, Employee ID label, etc) 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 used reflect actual organizational skill routing proficiency settings.

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

Figure 170: Spreadsheet format

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

Figure 171: Creating a new employee

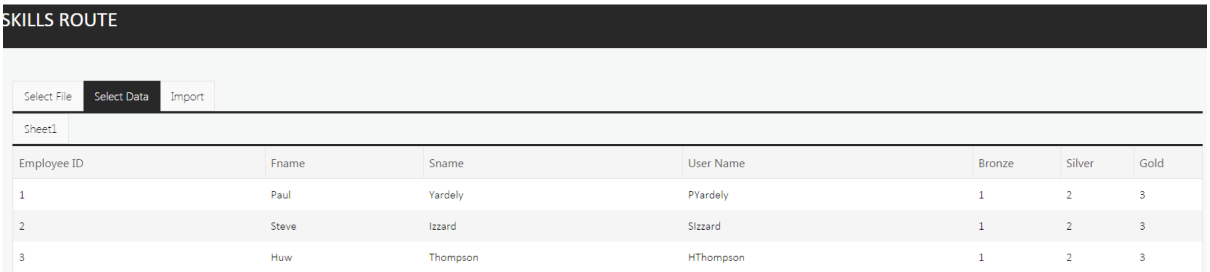
Employee ID	First Name	Last Name	User Name	Bronze	Silver	Gold
jhiggins	Joanne	Higgins	jhiggins	1	2	3
jparker	Jerry	Parker	jparker	2	3	3

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

Skills are added in the columns after the Employee ID, First Name, Last Name and User Name and the proficiency level associated with the Skill is entered in the cell against the relevant employee.

Figure 172: Setting employee skills

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

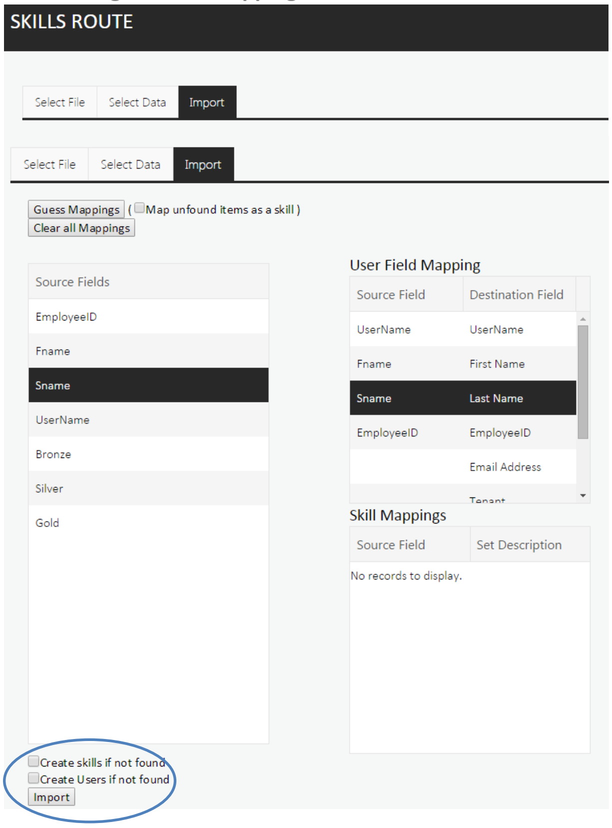


Employee ID	Fname	Sname	User Name	Bronze	Silver	Gold
1	Paul	Yardely	PYardely	1	2	3
2	Steve	Izzard	SIzzard	1	2	3
3	Huw	Thompson	HThompson	1	2	3

Figure 173: Confirming accuracy of input data

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

Figure 174: Mapping source and user fields



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

Figure 175: Finalising the import of employee data

24 CME Authentication (Genesys environment only)

If Optimizer is being used within a Genesys environment there is the option now to authenticate user access using their CME log in details. To enable this, ensure that the user's Genesys CME username is included in the user upload or that the relevant field has been included in the hierarchy import.

To configure this setting, select the **Systems Settings** page within Optimizer and select the **Field Mappings** tab.

This will display a screen similar to the following example:

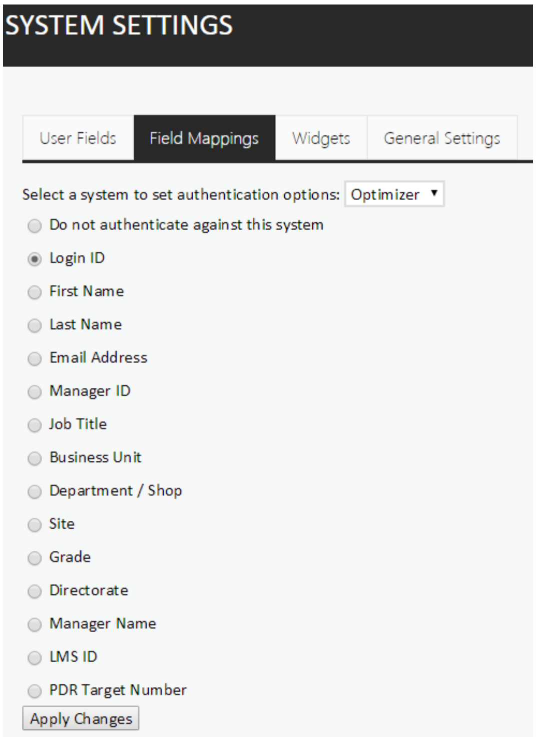


Figure 176: Authenticating user access via their CME credentials

Next, select Genesys from the drop down menu (Available only if Genesys CME authentication has been enabled) and select the field from which data will be used for authentication.

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

Once enabled, when users log into Optimizer they will be able to select **Genesys GIS** as the **Select System** option rather than Optimizer.

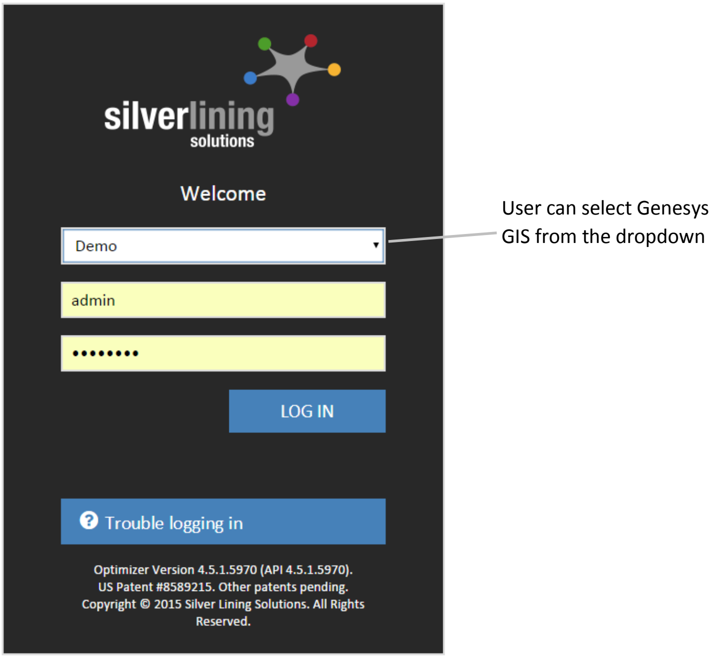


Figure 177: Selecting Genesys for authenticating user credentials

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

25 SkillsDNA Creation

Before DNA Roles and Blocks can be created DNA Components must be defined and KPI data imported. The DNA Component and KPI data is also used in the SkillsAnalysis page for correlation analysis.

25.1 Manage DNA Components

To begin creating DNA roles, first select the **DNA Components** page.

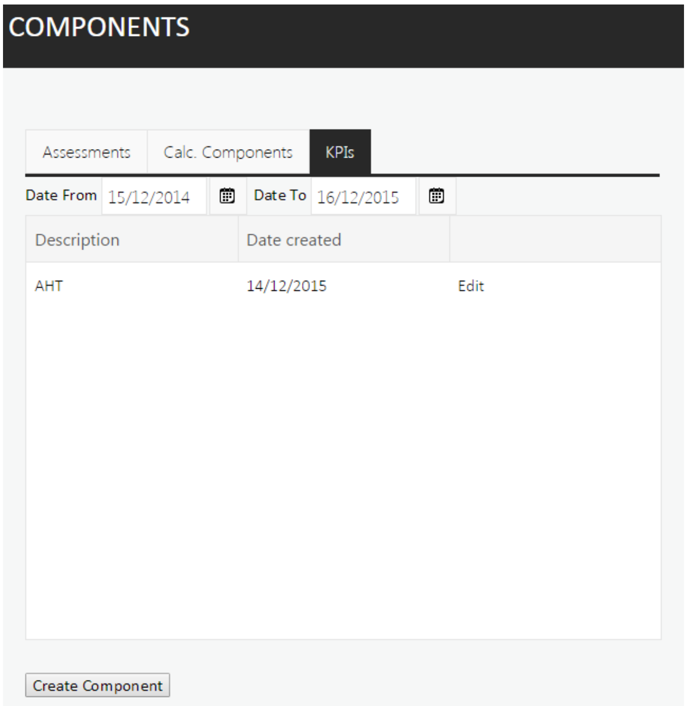


Figure 178: DNA Components page

There are 3 types of DNA Components:

1. **Assessments** – Imported Assessment scores (historical) or Assessment data from a 3rd party system.
2. **KPI** – Imported Key Performance Indicators and other Performance data.
3. **Calculated Components** – Performance scores or KPI's that are calculated based on other performace data.

To Create a new DNA Component, click on the **Create Component** button.

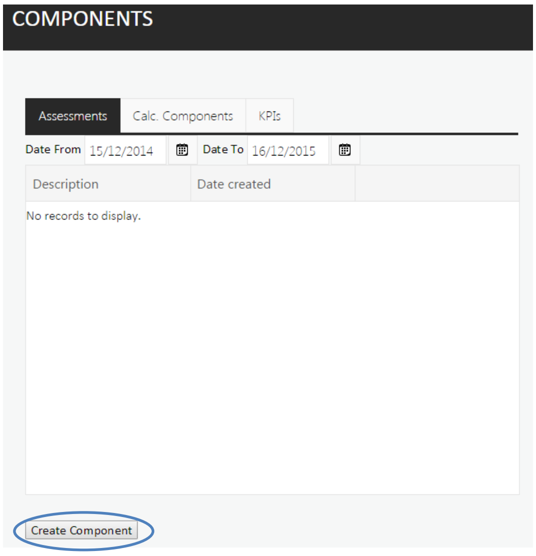


Figure 179: Create DNA Component

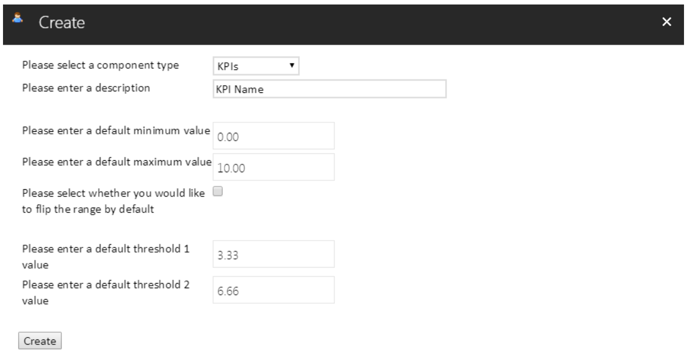


Figure 180: Defining DNA Component

Use the drop down box to select the component type. The example above shows a KPI component.

For the KPI Component, provide a description and then configure the remaining information as required, including:

- **Default minimum value** – this is used to normalise the lowest value expected for the KPI. For example if you enter 5 as the default minimum value, any imported values that are less than 5 will be rounded up to 5.
- **Default Maximum value** – this is used to normalise the highest value expected for the KPI. For example if you enter 100 as the default maximum value, any imported values that are greater than 100 will be rounded down to 100.
- **…flip the range by default** – by default Optimizer assumes that higher scores are indicative of better performance (‘better’). In some cases like Average Handle Time (AHT) or Hold Time (HT) lower values are normally considered better. By checking this option, Optimizer knows that lower scores are better.
- **Threshold 1** – For a default-set KPI where high scores are better, this will be the value that defines the Red / Amber boundary. Less than this value and performance is rated as Red and greater than this value performance is rated as Amber.*

- Threshold 2 – For a default-set KPI where high scores are better this will be the value that defines the Amber / Green boundary. Less than this value and performance is rated as Amber and greater than this value performance is rated as Green.*

*When …flip the range by default is selected the Thresholds are reversed making threashold 1 the boundary between Green and Amber and threshold 2 the boundary between Amber and Red.

Once you have configured the component details click **Create** to create the component.

After creating the component it will appear in a list like the following example:

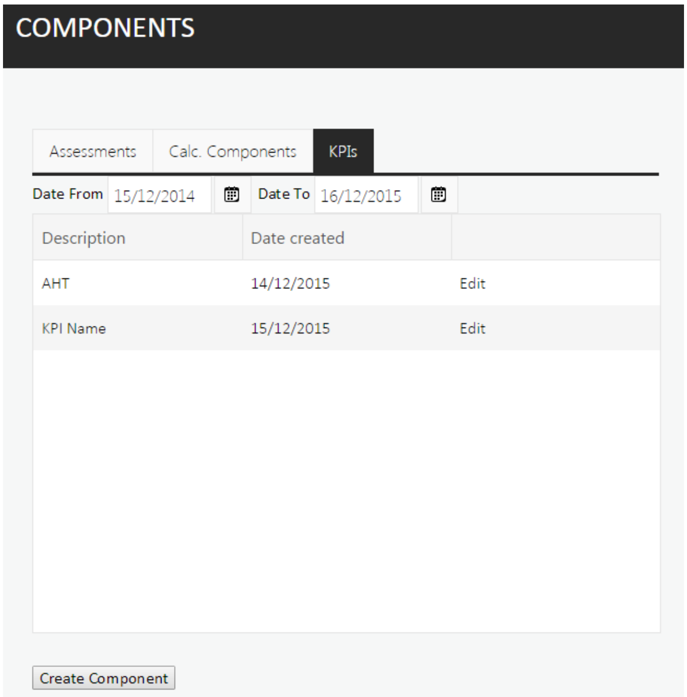
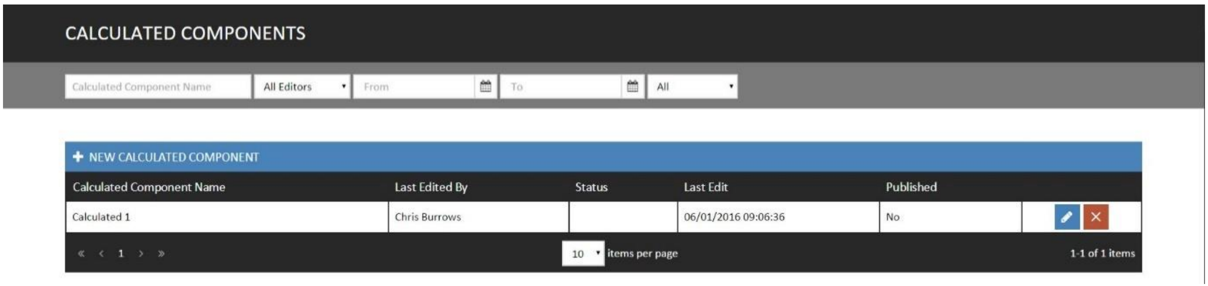


Figure 181: Display of the created DNA component

25.2 Calculated Components

The Calculated Components page supports the creation and management of DNA Calculated Components. Calculated Components consist of a formula which can include arbitrary numbers and KPI components as the operands. Calculated components can be used within DNA blocks in the same way as KPI components. Calculated components are useful if DNA blocks are insufficient to provide a combined score from multiple KPIs. As with KPIs and blocks, each DNA user will have a score for the calculated component based on the formula and their KPI scores. To manage calculated components, browse to the **Admin -> DNA -> Calculated Components** page in the menu.

Figure 182: Calculated Components page



25.2.1 Searching and filtering Calculated Components

The top of the Calculated Components page includes a search bar and filters to restrict the number of calculated components based on entered criteria. The first box at the top of the page supports searching of calculated components for specific criteria. Entering a value into the calculated component search box will result in the page removing all calculated components which do not contain the value in the component's name. The search results are updated automatically while value is being input; there is no button to begin the search. The second item at the top of the page allows for the filtering of calculated components based on the editor. Selecting an editor from this drop-down will remove any calculated components that were created by other users. The third and fourth controls at the top of the page allow for the filtering of the view of calculated components to just the items that were last edited in the specified time period (using the 'from' and 'to' date picker controls). The last item at the top of the page allows for the filtering of results based on whether items are published/unpublished. This option is set to 'All' by default. This control can be used if you only wish to see published or unpublished calculated components.

25.2.2 Calculated Component Status

The Calculated Components page includes a status bar under the searching and filtering features. This bar shows how many published calculated components are in each state of processing. The allowed states are: Successfully Processed, Awaiting Processing, Processing, Completed with Errors and Failed. By default, the processing of calculated components occurs automatically every minute (**Note**: there is no option to manually process calculated components). This will only occur if there is new KPI data or new calculated components have been published since the last time the components were processed. Users will not have a value for calculated components until the component has been published and processed.

25.2.3 View of Calculated Components

The main part of the Calculated Components page includes a table listing the Calculated Components for the current database. This view may not include all calculated components depending on whether a search value has been specified or if any of the filters are set to non-default values. The table includes columns for: Calculated Component Name, Last Edited By, Status, Last Edit, published. The last column includes controls for edit and delete (**Note**: the delete control isn't available once a calculated component has been published). The bottom of the page includes paging controls on the left side, a drop-down control for selecting the number of items that should be displayed per page, and the number of calculated components available. The top of the table includes a button that allows for the creation of new calculated components. The table headers also support sorting, clicking multiple times will cycle through ascending/descending order for the selected column.

25.2.4 New Calculated Component Form

To create a new calculated component, click the '+ New Calculated Component' at the top of the table of calculated components. The form includes a name field (a value must be provided for this field) and a section for calculation details. The calculation details section initially includes a drop-down control.

Figure 183: Creating a new calculated component

It is possible to either type numbers/operators/KPI names into this control directly or use the down arrow to view and select the available options. Clicking the down arrow will display available operands, brackets, and KPIs. Pressing the space bar will create the first element of the formula based on what was entered/selected and set the cursor focus to a new dropdown control to the right of the first element. Once you've created multiple elements, it is possible to edit them by double-clicking to move the focus to the element and enable the drop-down control.

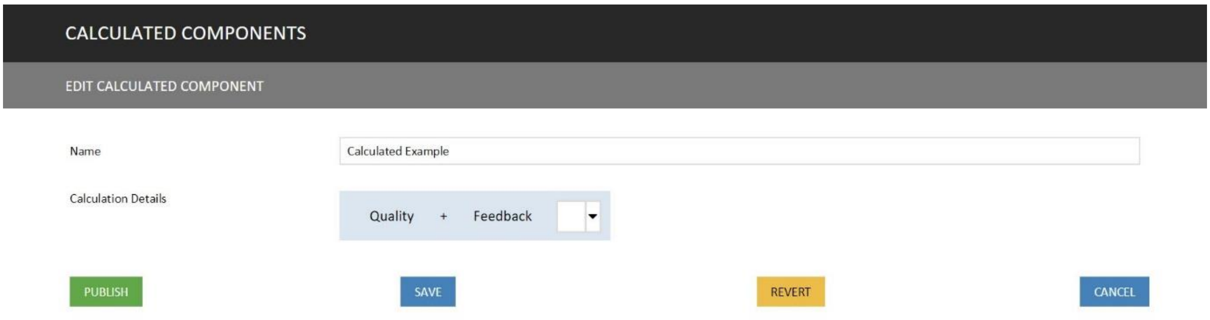


Figure 184: Editing a calculated component

The bottom of the page include Publish, Save, Revert and Cancel buttons. The publish button immediately saves and publishes the formula. The save button saves the currently specified formula so that it is available for editing in the future. It is possible to save a rule that is syntactically invalid. The publish button, however, is only enabled if the formula is valid (i.e. valid syntax). If you open an existing formula, make changes, then click the Revert button, the formula will be changed back to the last previously saved state. Clicking the cancel button undoes all changes made to the formula if it is an existing formula or cancels the creation of a new formula.

Once a formula is published it will be added to the queue of formulas that require processing. Users will have a value for the calculated component once the formula has been processed.

Notes:

Only published calculated components can be added to DNA blocks.

Published calculated components cannot be deleted.

Once a calculated component has been published, it can still be edited; however, it must then be re-published for the changes to take effect.

25.3 Import KPI Data

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

In the following sample, there is a unique identifier for the individual, a date and associated data.

Figure 185: Importing Key Performance information via a spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Firstname	Surname	Employee number	Manager	Position	Region	Location	Team	Company	Date	**Product Knowledge (Assessment)**	**Agent Attitude**	**Customer Info Fit**	**Identify Problem&Soln**
2	Tianni	Ayala	tayala	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	8	6	9	8
3	Lisa	Barnes	lbarnes	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	3	7	5
4	Lonnie	Bruce	lbruce	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	9	4	10	9
5	Shane	Carlson	scarlson	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	10	6	3	4
6	Brian	Chen	bchen	atalbot	Agent	Manchester	Worsley	Team 1	My Company	01/11/2011	7	6	1	1

25.3.1 Manually Importing KPI data

KPI data is manually imported into Optimizer by selecting the **Import KPI Data** page and clicking on **Import New Data**., as shown below.

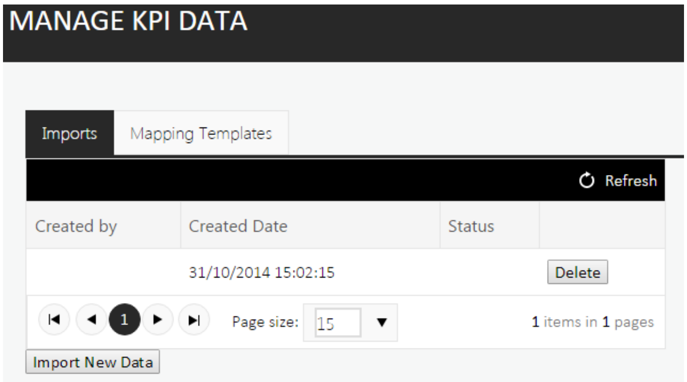


Figure 186: Importing KPI data

Use this process to upload any new data.

Note: The ability to archive KPI imports has been removed from version 2.7 onwards. Any KPI imports which were archived prior to an upgrade will be un-archived.

Next, the Import Wizard will appear, as shown in the following example.

After selecting the file with the KPI data, click on **Next**.

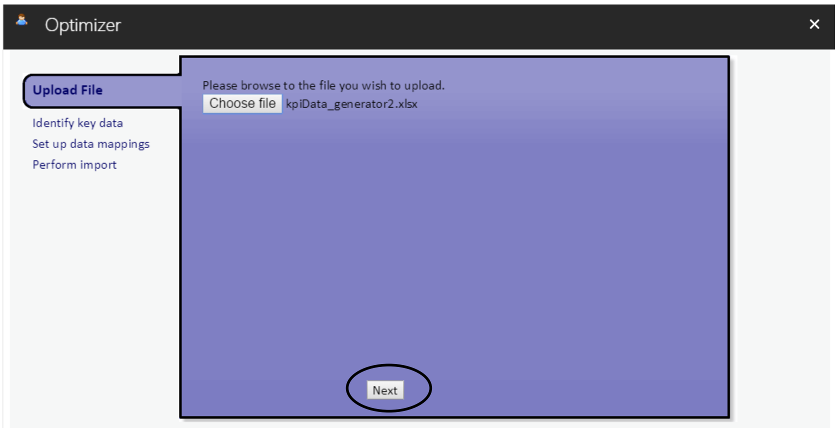


Figure 187: Importing KPI data

From the drop down box select the sheet that contains the data that you want to import and Map the required fields to the corrosponding Spreadsheet column headers.

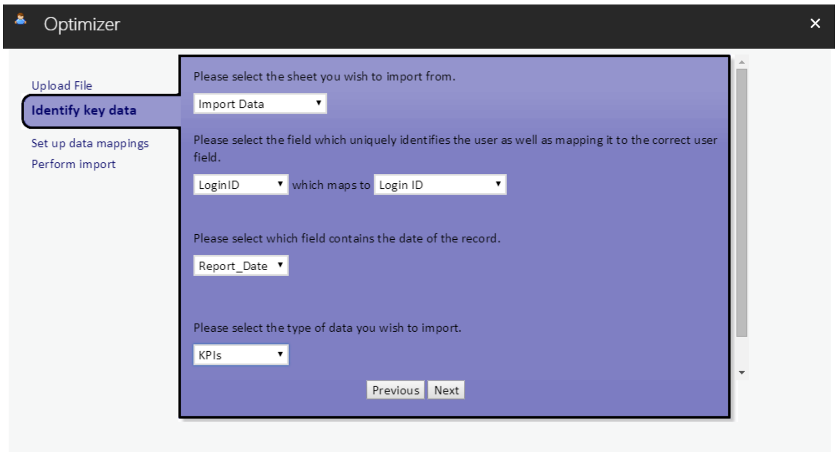


Figure 188: Importing KPI data

Click on **Next** once mappings are completed.

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

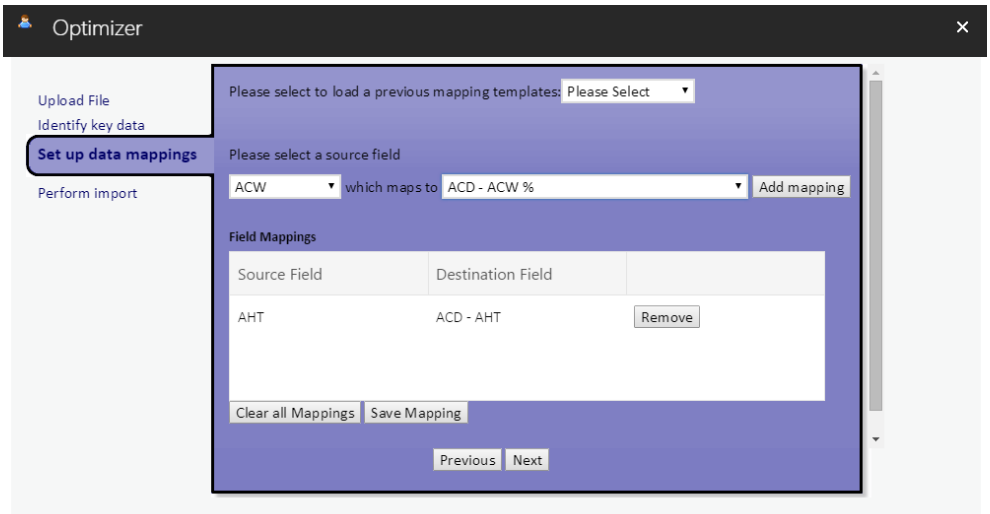


Figure 189: Mapping source fields to existing components

After selecting **Add mapping** the selected source and destination fields will appear within the **Field Mappings** list. Repeat this process until all of the KPIs on the spreadsheet have been mapped to their corrosponding DNA Components.

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

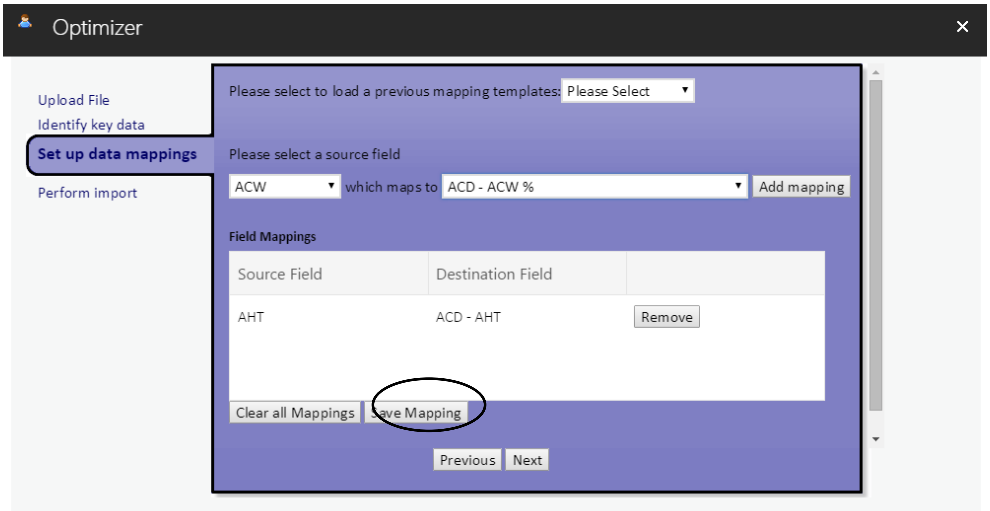


Figure 190: Viewing mapping results and saving import templates

Any saved templates will be availabile from the 'Please select to load a previous mapping template:' dropdown list for future imports.

Click on **Next** to navigate to the import process.

Click on **Start Import** to import the data.

Note: clicking Finish at this stage will not import the data and you will need to start the process again**.**

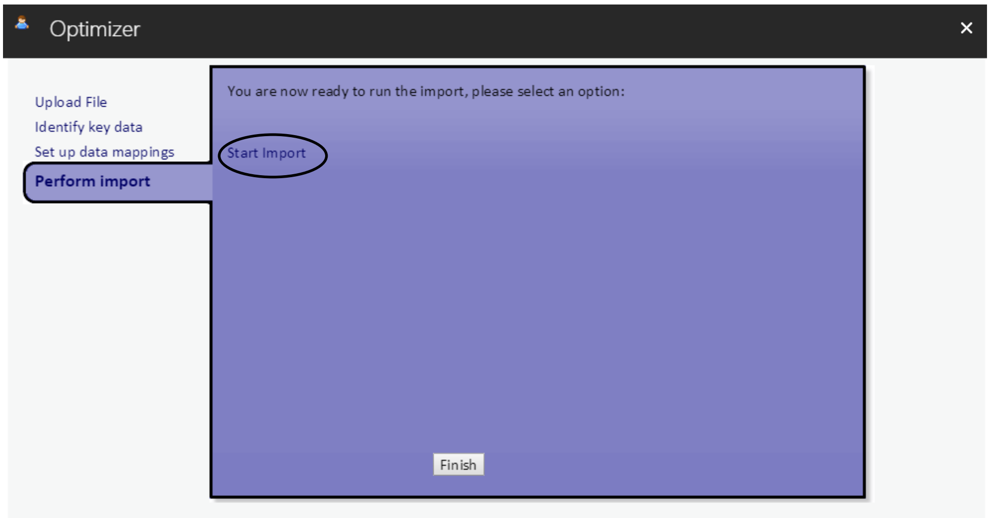


Figure 191: Starting data import

Once the import has been completed you are safe to click on **Finish**.

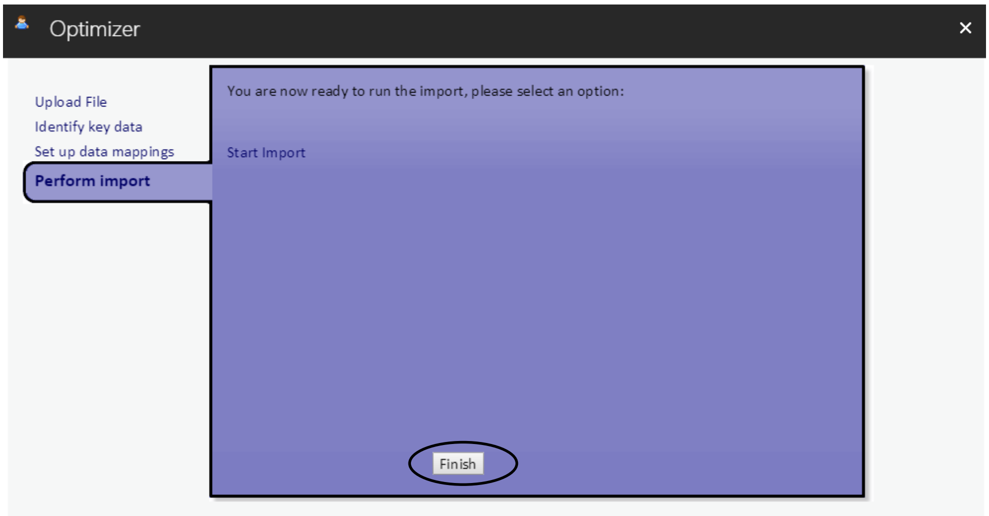


Figure 192: Finalising data import

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

25.3.2 Automatically Importing KPI Data

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

DNA User Field Mapping

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

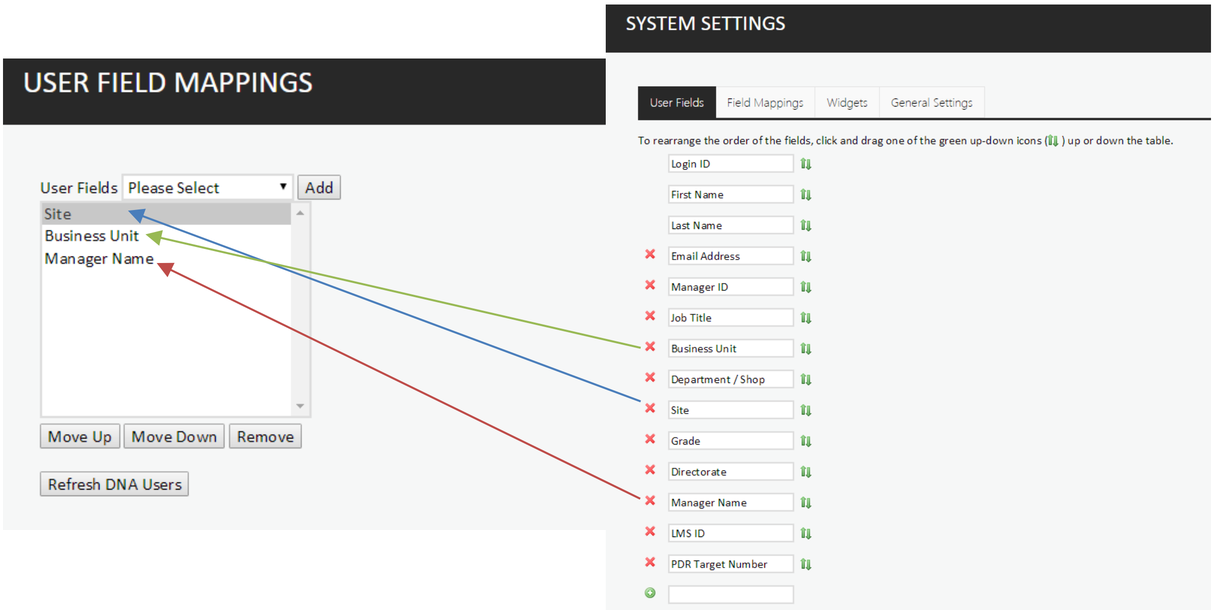


Figure 193: Setting DNA data filters in the DNA User Field Mapping page

25.4 Manage DNA Blocks

DNA blocks are combinations of measurable performance metrics and are created in the **DNA Blocks** page as per the example below.

To create a DNA Block, first select desired DNA components and drag and drop them into the DNA block to the right. The following example shows the DNA component ACW (a KPI) being added to a DNA Blocks.

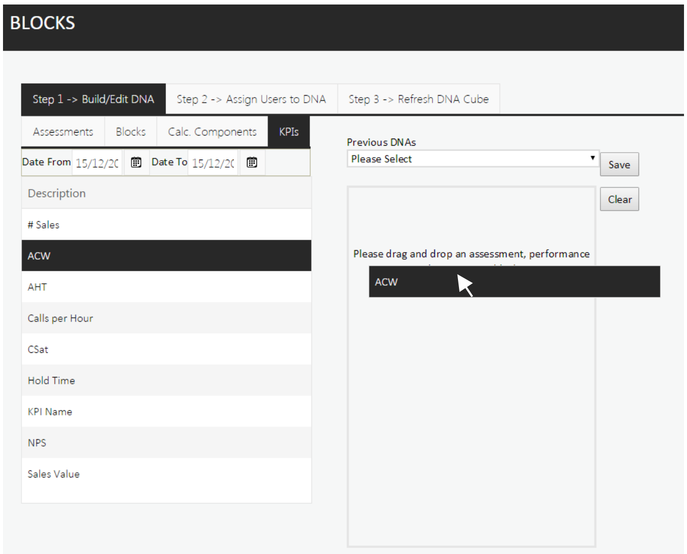
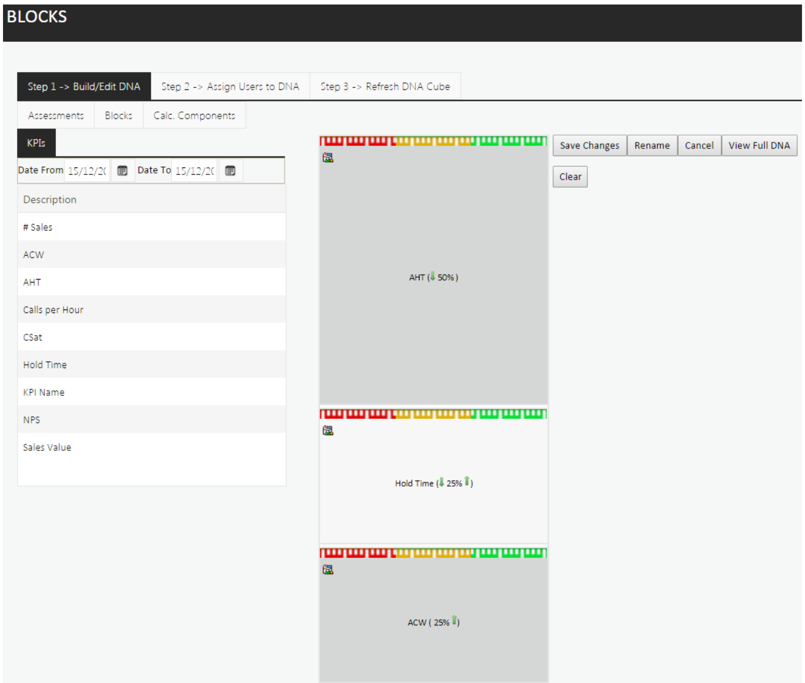


Figure 194: Creating DNA blocks

Multiple components can be used to create a single DNA block, as shown in the example below:

Figure 195: Creating DNA blocks using multiple components



Each element within the DNA Block can have its own weighting. The weighting can be altered by either draging the dividing line up / down or by clicking on the green arrows ↓↑.

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

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

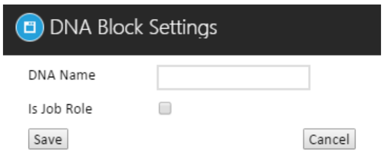


Figure 196: Saving a new DNA block

The newly created DNA block will now be available for selection in the **Previous DNAs** drop down box and within the **DNA** tab.

25.5 Job Roles

In Multiple DNA Blocks can be combined within one **DNA Job Role**. In the following example several DNA blocks have been combined to create a Sales Employee job role.

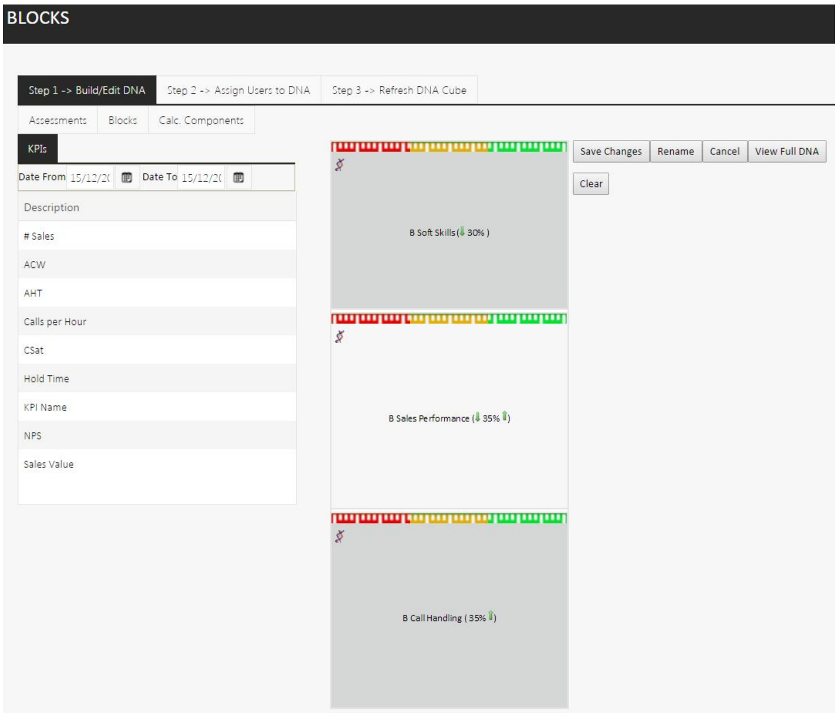


Figure 197: Display of existing DNA blocks

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

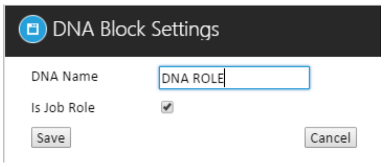


Figure 198: Creating a new job role

Once DNA Blocks have been saved as Job Roles, they can be associated with users. **Note**: Users can only be assigned to one job role.

To assign an individual to a job role, highlight the user(s) and drag and drop them into the desired job role. The following example shows an employee being assigned to the Sales Rolele.

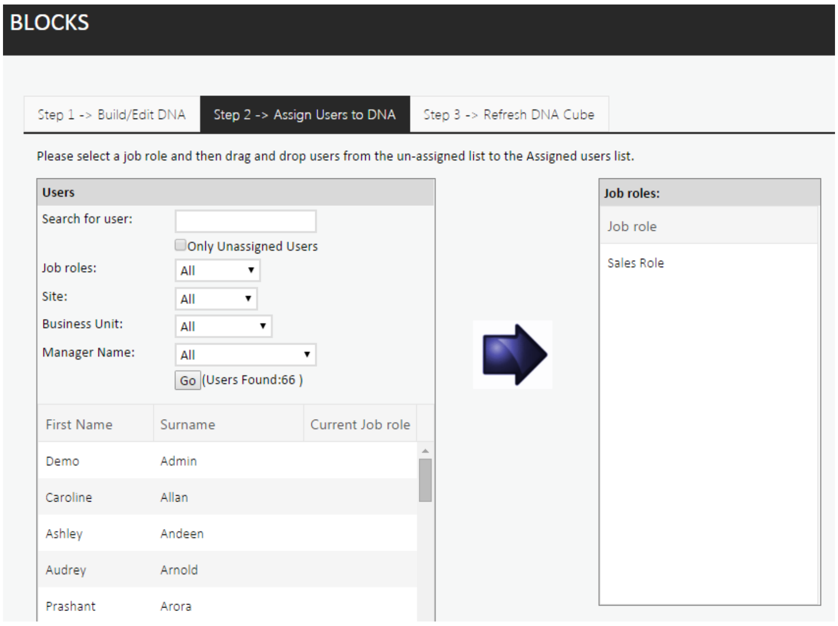


Figure 199: Assigning individuals to job roles

After assigning users to roles, select the last tab and refresh the DNA Cube.This will process all of the DNA data updating DNA scores, Agregations and User associations.

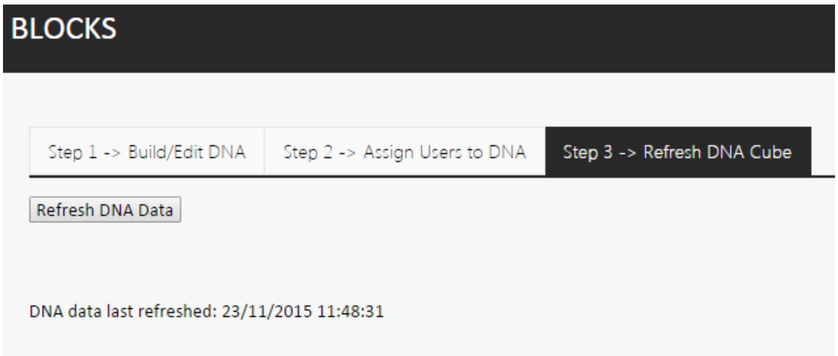
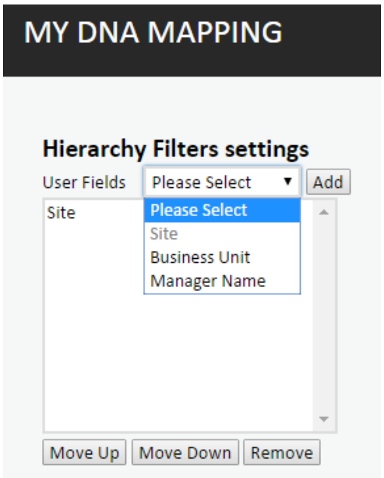


Figure 200: Refreshing the DNA cube

25.6 My DNA Mapping

Settings for options for filtering data on View Filtered DNA Page are set using My DNA Mapping. The options available are based on the user fields selected in the **DNA User Field Mapping** page.

Figure 201: Filtering the DNA view



25.7 View Filtered DNA

The **View Filtered DNA** page shows user performance, compared to the aggregate DNA block and can be viewed by hierarchical position or at individual level. **Note**: Hierarchical viewing options depend on permissions user has assigned.

In the following 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 and as donut graphs.

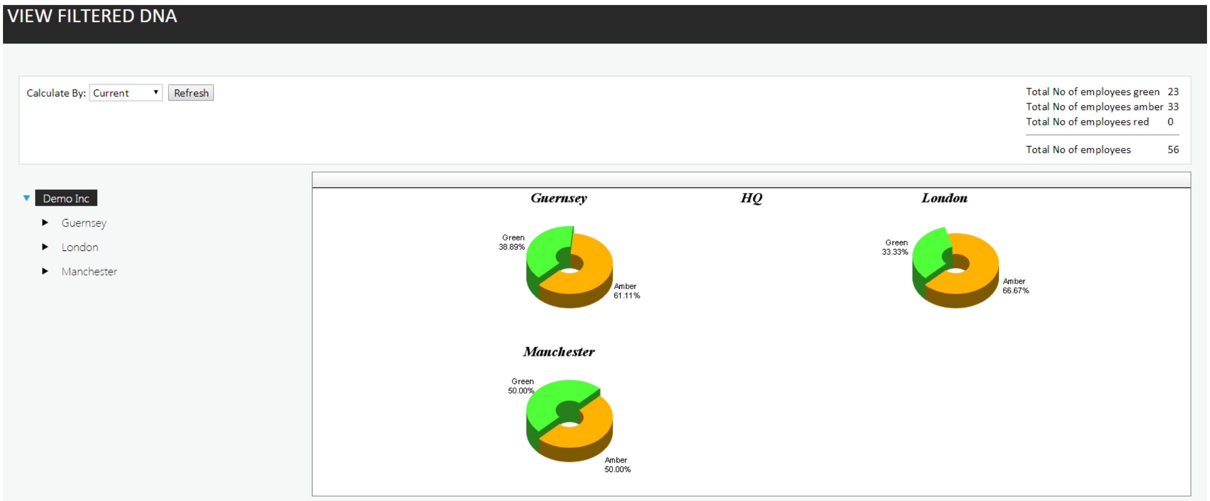


Figure 202: View Filtered DNA page

To view the individual user results, either click on the graph or expand the hierarchy. **Note**: Managers will only have access to see data of their direct reports, and employees without direct reports will only be able to view their own data.

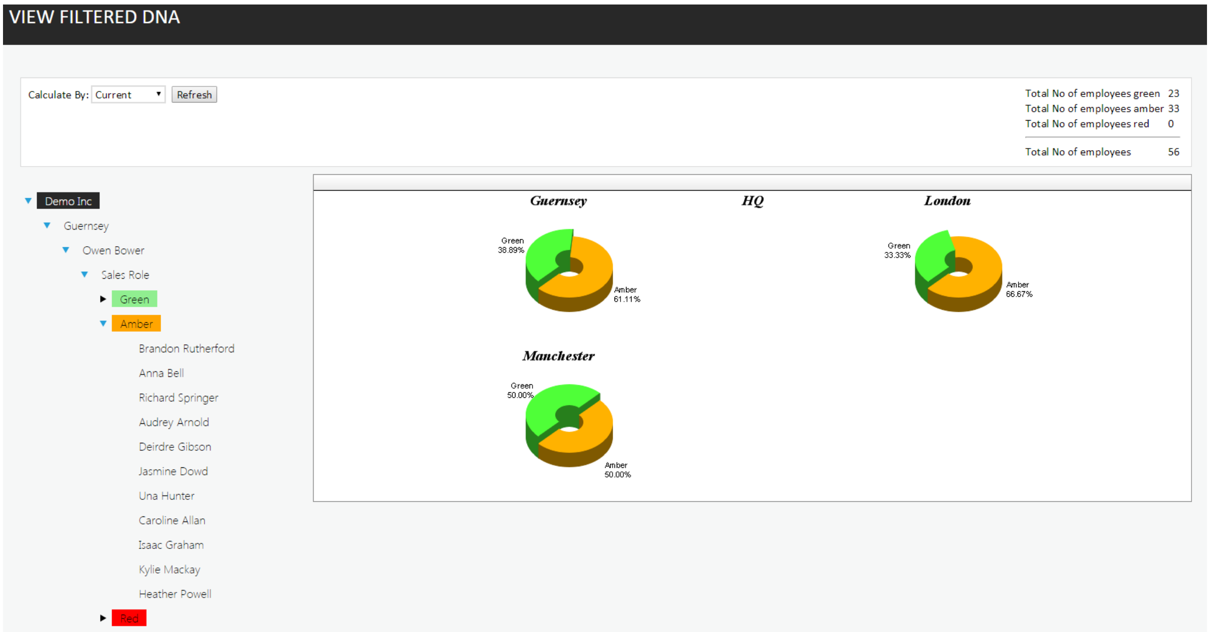


Figure 203: Viewing detailed information in the View Filtered DNA page

Select an individual user to view their DNA results. Any under performing areas will show on the right under Alerts.

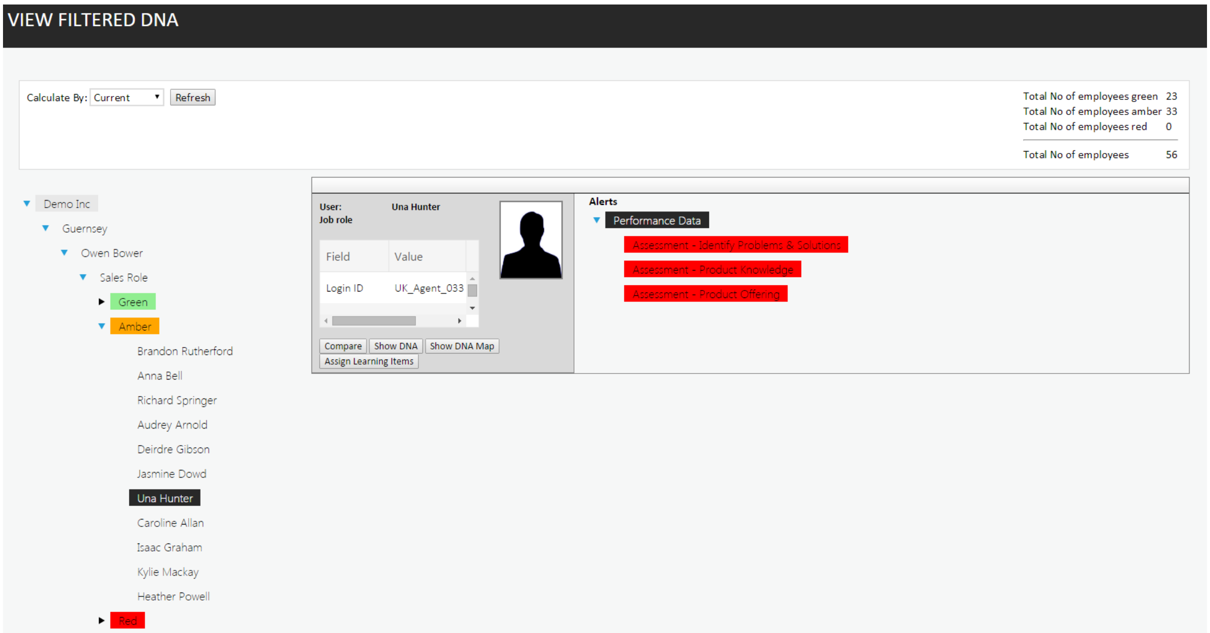


Figure 204: Viewing individual DNA results

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

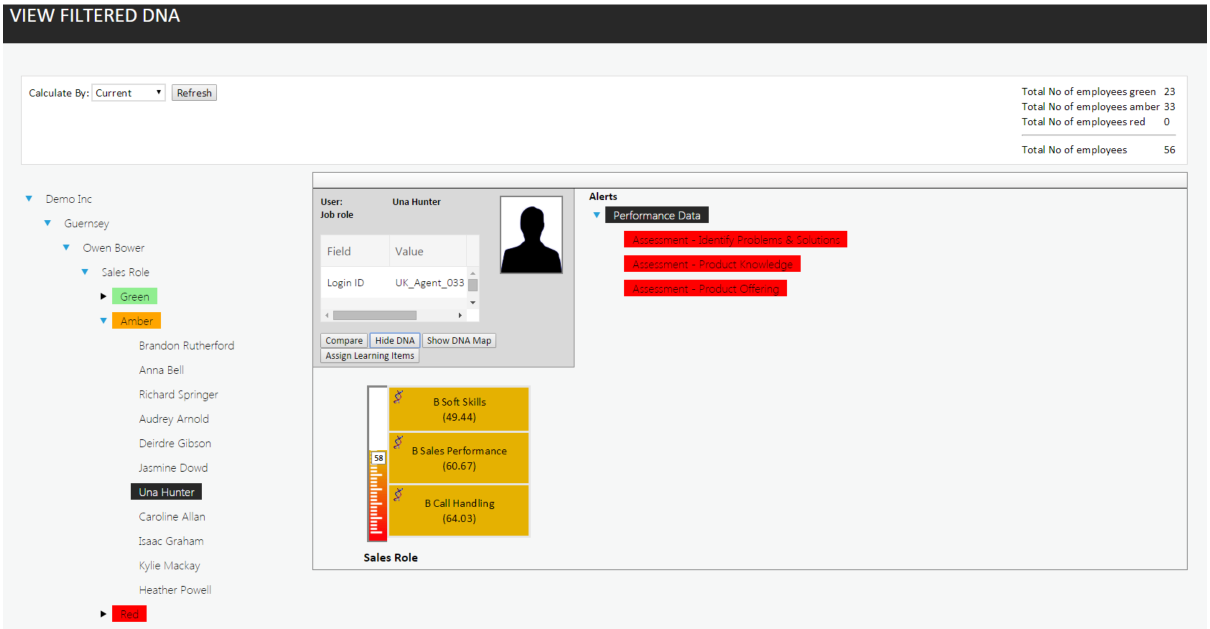


Figure 205: Viewing individual DNA results

lick on **Show DNA Map** to view the full DNA breakdown.

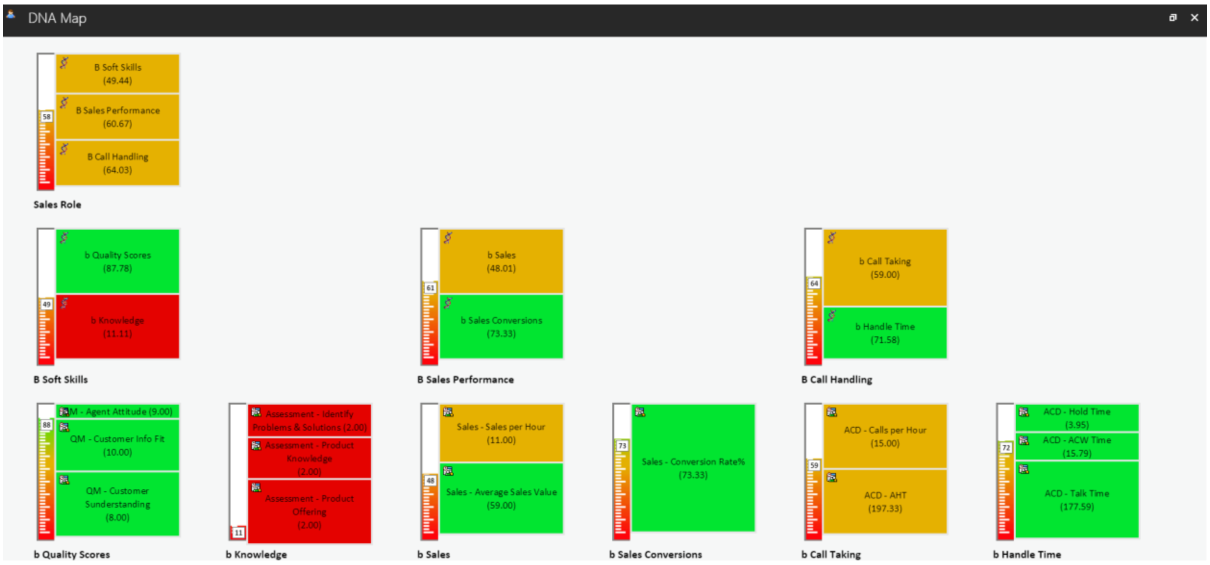


Figure 206: Viewing the DNA map

There is also the option to compare an individual's scores against another job role to identify possible development areas or career progression.

Figure 207: Comparing individuals with other job roles

To view any associated learning items that might be available to assign to the individual, click on **Assign Learning Items**.

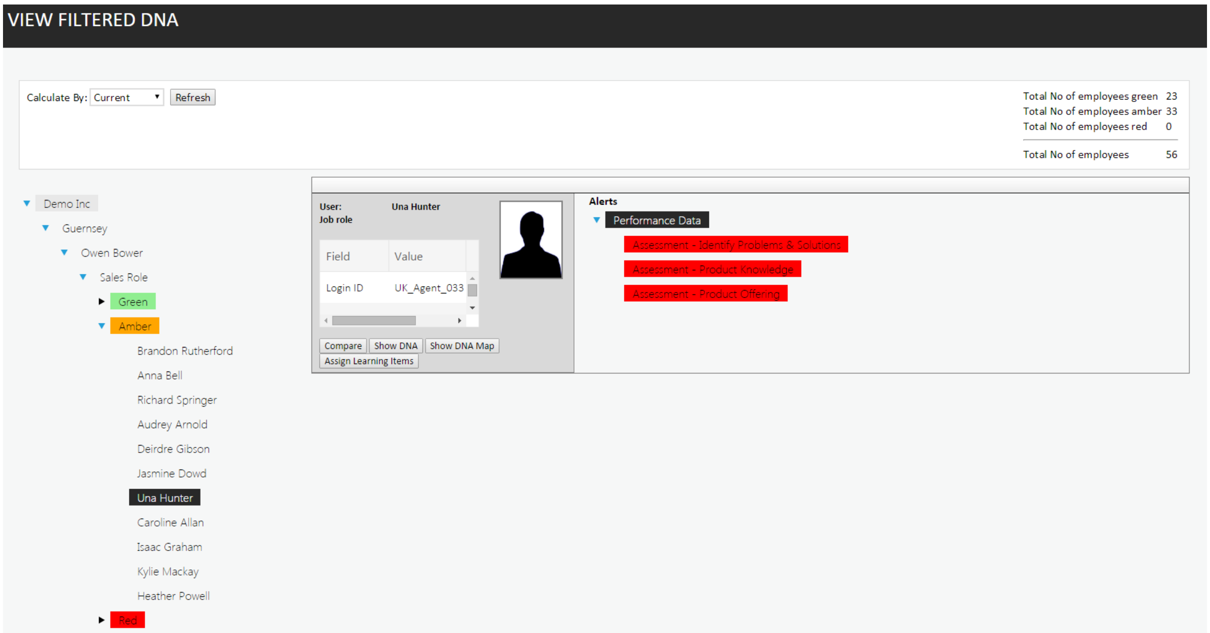
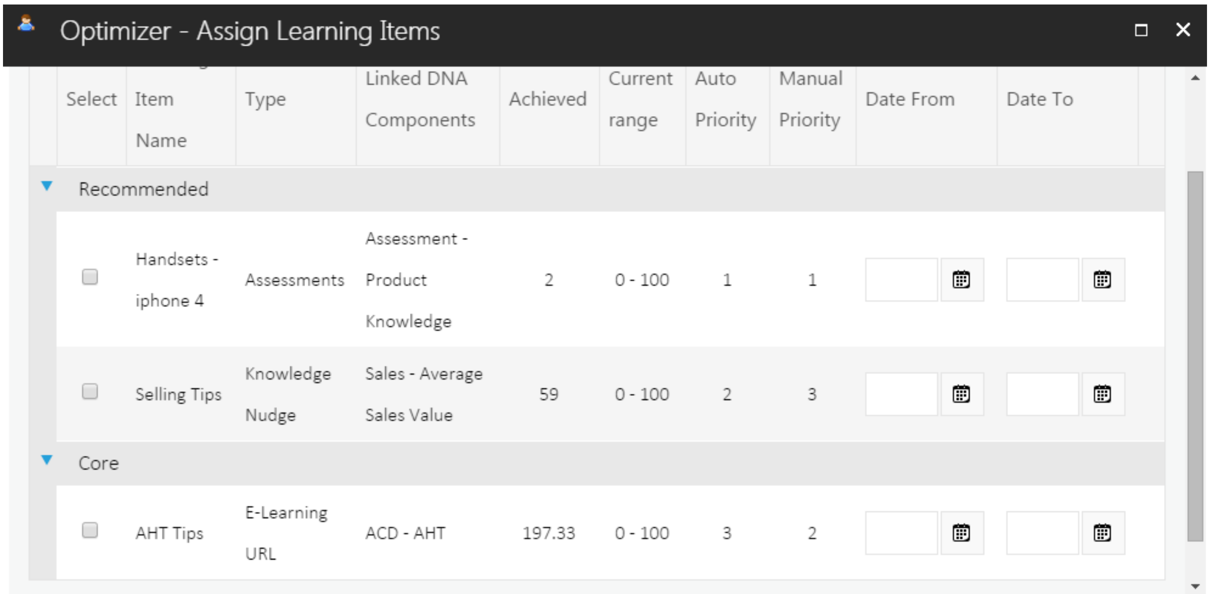


Figure 208: Assigning Learning Items

Recommended learning items will be presented as per the following example. Tick the box at the left hand side to select and assign them. In the example below, Objection Handling has been selected.



Select	Item Name	Type	Linked DNA Components	Achieved	Current range	Auto Priority	Manual Priority	Date From	Date To
Recommended									
☐	Handsets - iphone 4	Assessments	Assessment - Product Knowledge	2	0 - 100	1	1		
☐	Selling Tips	Knowledge Nudge	Sales - Average Sales Value	59	0 - 100	2	3		
Core									
☐	AHT Tips	E-Learning URL	ACD - AHT	197.33	0 - 100	3	2		

Figure 209: Assigning Learning Items

Scroll down to the bottom to select **Assign and View Users Report.**

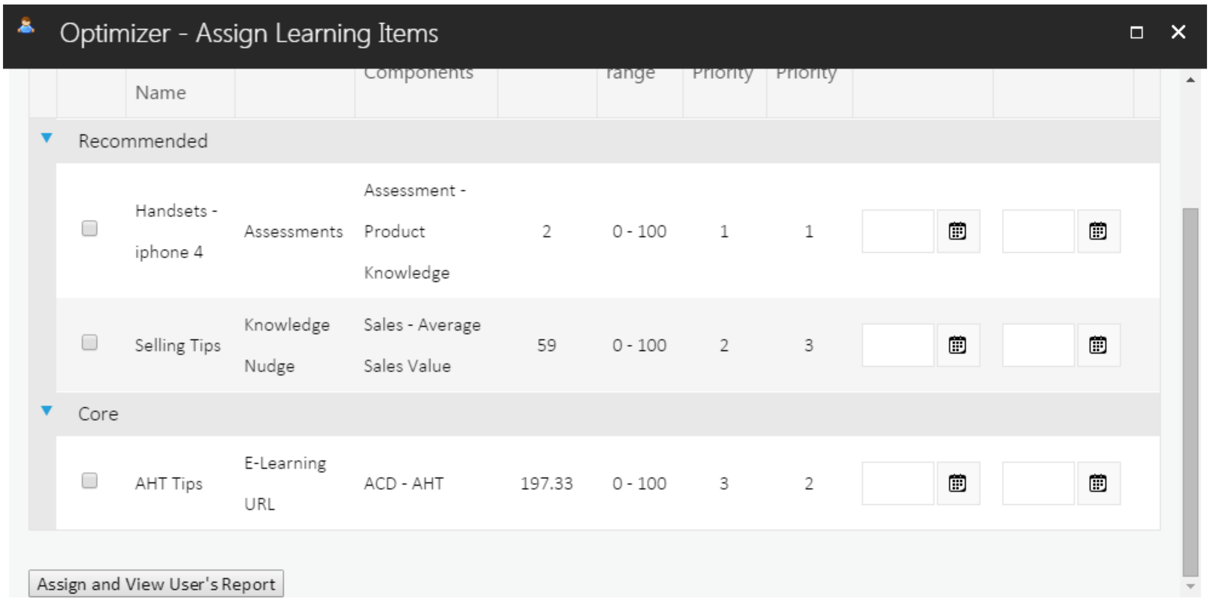


Figure 210: Assigning Learning Items

Assigned Learning Items will be added to the list of Assessments, Learning Items and Knowledge Nudges available to the user under their My Development page. In addition to this a PDF file will be created and downloaded detailing which Learning Items have been assigned to the user.

25.8 Top DNA Agents

The **Top DNA Agents** page is used for viewing and reporting DNA and performance.

In the following example, 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 they are still measured for the aggregate DNA components.

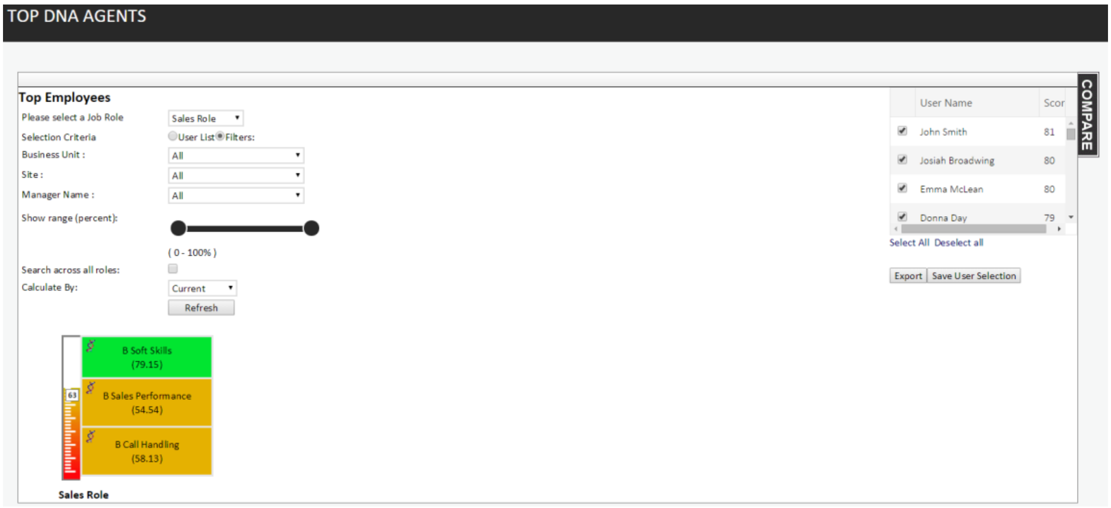


Figure 211: Top DNA Agents page

Results can then be filtered. The following example displays users with an overall DNA (for selected job role) between 90 and 100%.

Custom user selections can be created by selecting specific users from the list on the right side of the page and clicking the **User List** radio button in **Selection Criteria**. This will then load data based on the users in the saved selection.

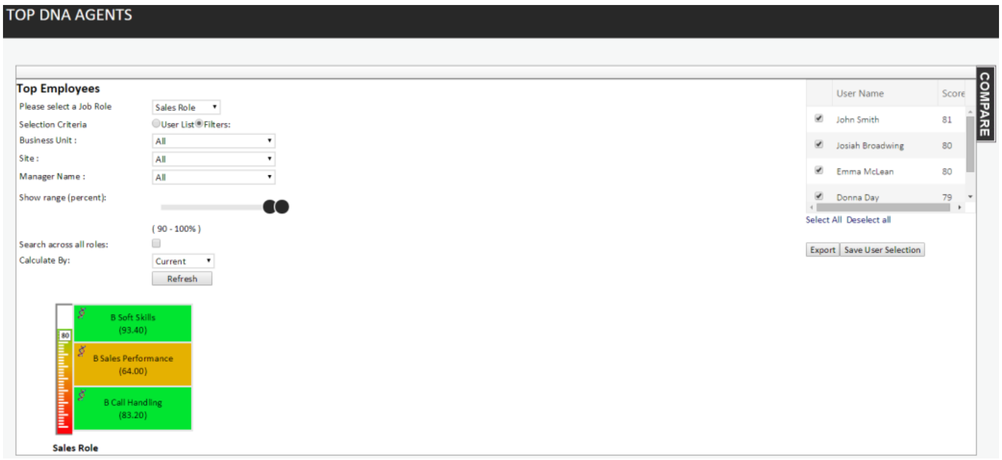


Figure 212: Filtering results in the top DNA Agents page

Individual users can also be selected. However, this will ignore any filters applied in the **Top Employees** section.

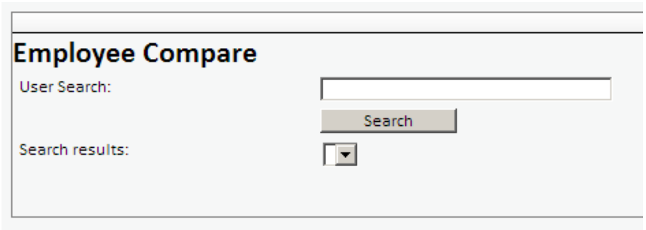


Figure 213: Viewing detail about a selected user

25.9 DNA Trend Graph

Changes in individual or group DNA data over time can be viewed using the **DNA Trend Graph**. It is possible to view DNA trends at a high level, e.g. for DNA blocks and job roles or to track progress of individual KPIs for one or a group of selected users.

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

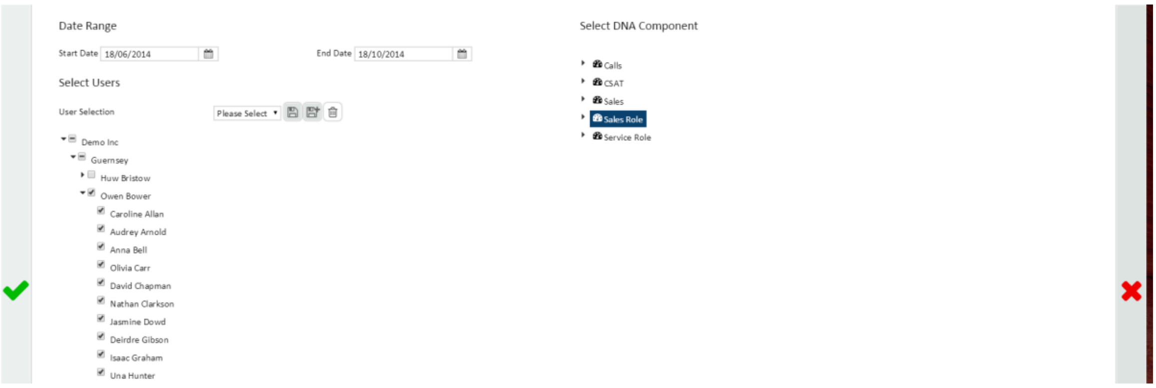


Figure 214: Trend graph date range, user and DNA component options

The DNA trend graph date range is defined using the Date Range drop down calendars on the top left side of the page.

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

Note: Administrators are able to view DNA data for all users. Other user types will be limited to viewing data for users who appear under them in the Hierarchy. An individual will only see their own DNA data if there are no sub-positions beneath him/her in the hierarchy.

Once a date range, user(s), and a DNA role/component have been selected, click the green tick icon on the left side of the page. The requested data will then be loaded and displayed.

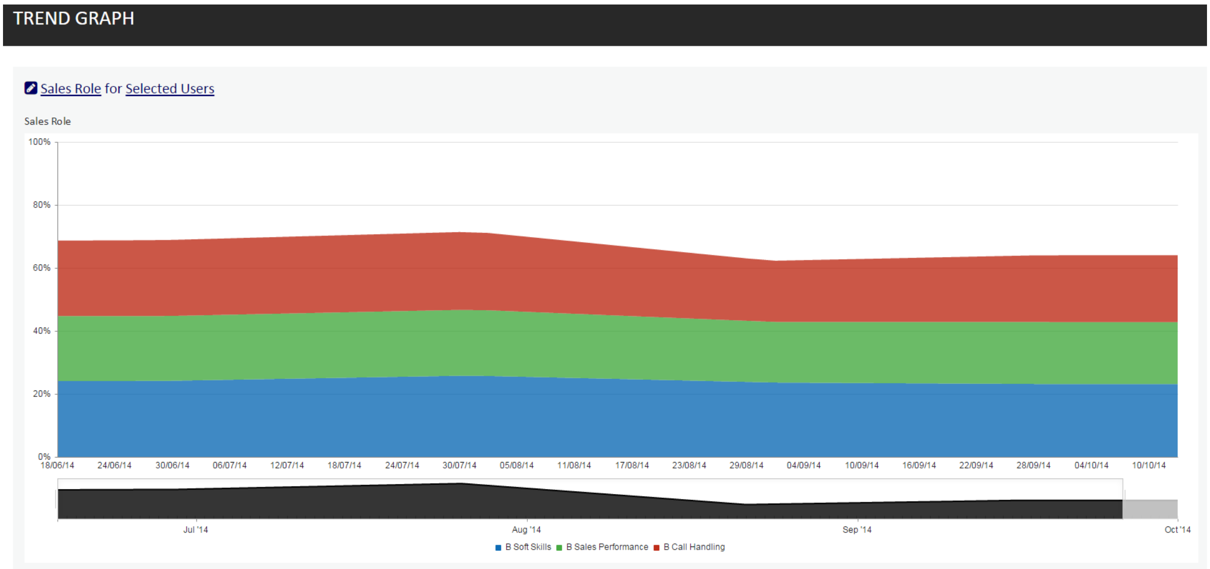


Figure 215: Trend Graph

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

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

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

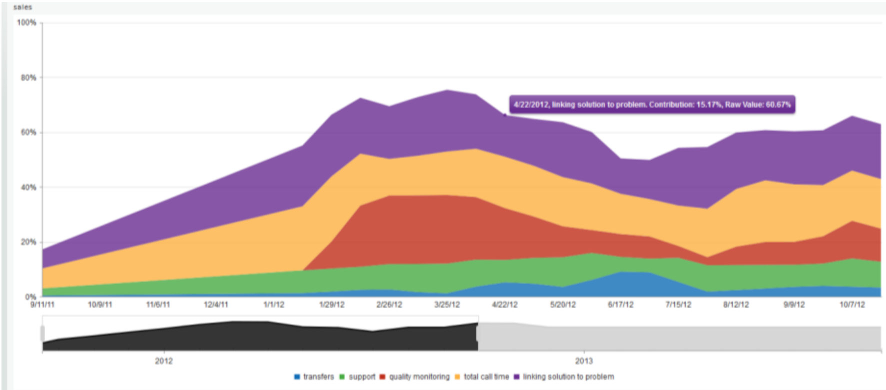


Figure 216: Trend Graph

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

25.9.1 User selections

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

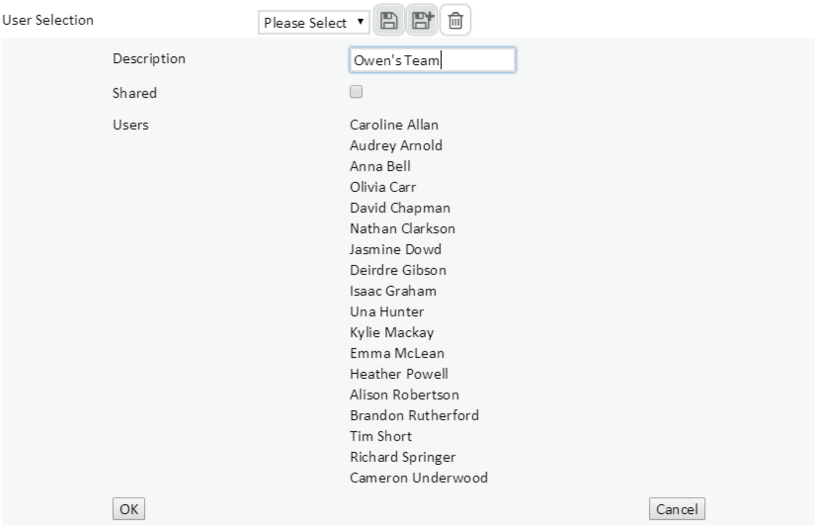


Figure 217: User selection options

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

6. Click **OK** to save the new user selection.

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

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

1. Select the saved user selection from the dropdown menu.

   Edit the description and/or the **Shared** status checkbox.

   Click the **OK** button.

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

2. Select the saved user selection from the dropdown menu.
3. Add/remove users via the user selection checkboxes.
4. Click the Save icon.
5. Verify that the listed users are the ones you wish to save in the user selection and click the **OK** button.

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

25.10 User Progress Graph

Users can view their progress over time and identify whether they are in the red, amber or green band for their job role using the **User Progress Graph**. The User Progress Graph page is not available to users by default and must be added to roles via the **Roles & Widgets** page.

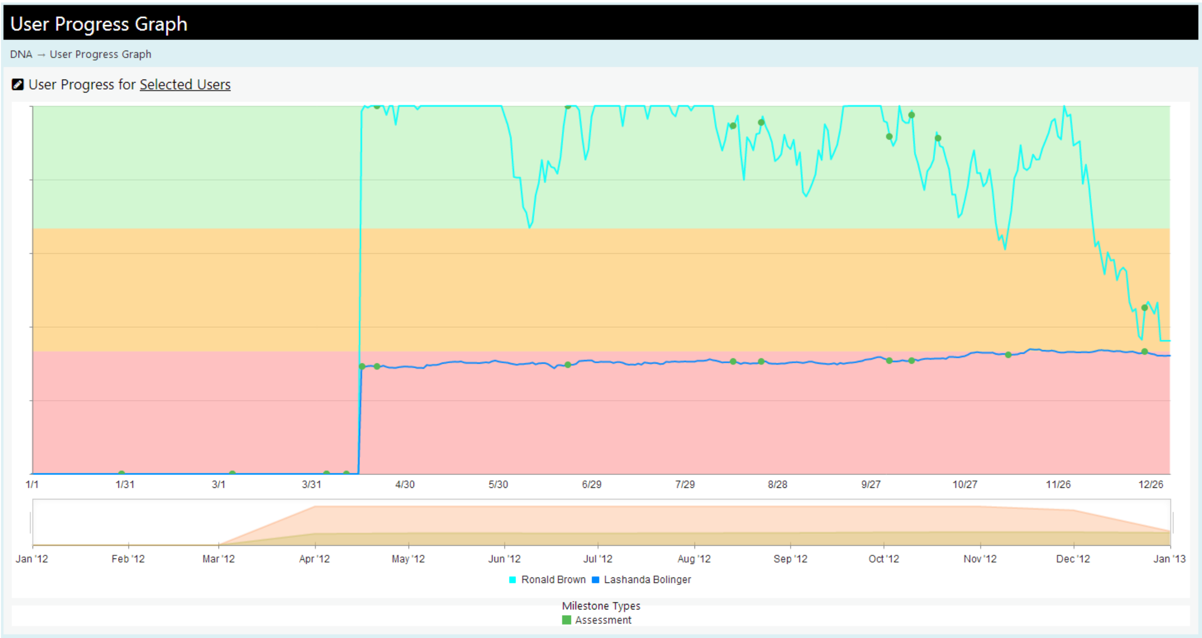


Figure 218: User Progress Graph

To view a progress graph for users, select the page from the DNA element of the navigation menu. Click the edit icon or the **User Progress for Selected Users** text at the top of the page to edit the graph date range and selected users.

Notes:

- The list of users available will depend on the logged in user's role. Administrators can view information about all users, managers can view information about themselves and their reports and employees without reports can only see information about themselves.
- The progress graph data is based on the current definition of the job role. If the structure of a job role is changed, the result of the progress graph for that job role will be different for all users over the whole time period for which data is available.

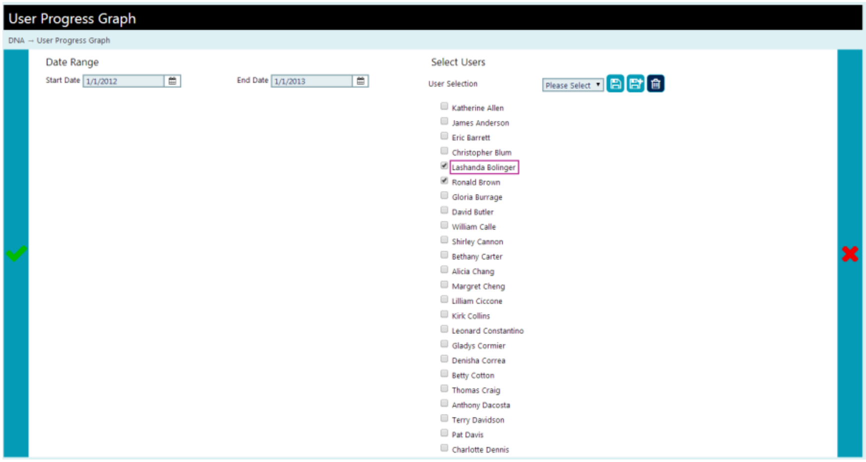


Figure 219: Selecting users

Use the start and end date pickers to select the graph's time range and select the users that you wish to see displayed on the graph from the **Select Users** page. Click the tick bar on the left of the page to confirm selections and view the graph, or use the cross bar on the right to cancel changes and return to the graph.

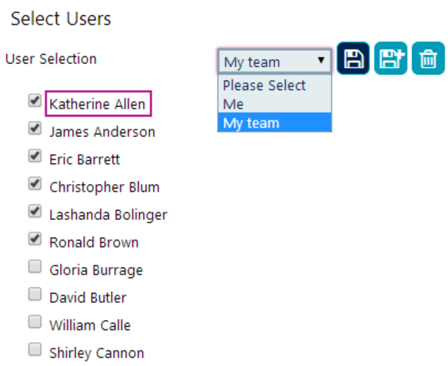


Figure 220: User selections

It is possible to save user selections to avoid the need to repeatedly select the same users when viewing the graph. This can be achieved by selecting a group of users and clicking the **Save** icon at the top right of the screen. Set a description for the team, enable the **Shared** option if you wish to share the user selection with other users and click OK. The new user selection will then be included in the user selection drop-down box. User selections can be deleted using the Delete icon.

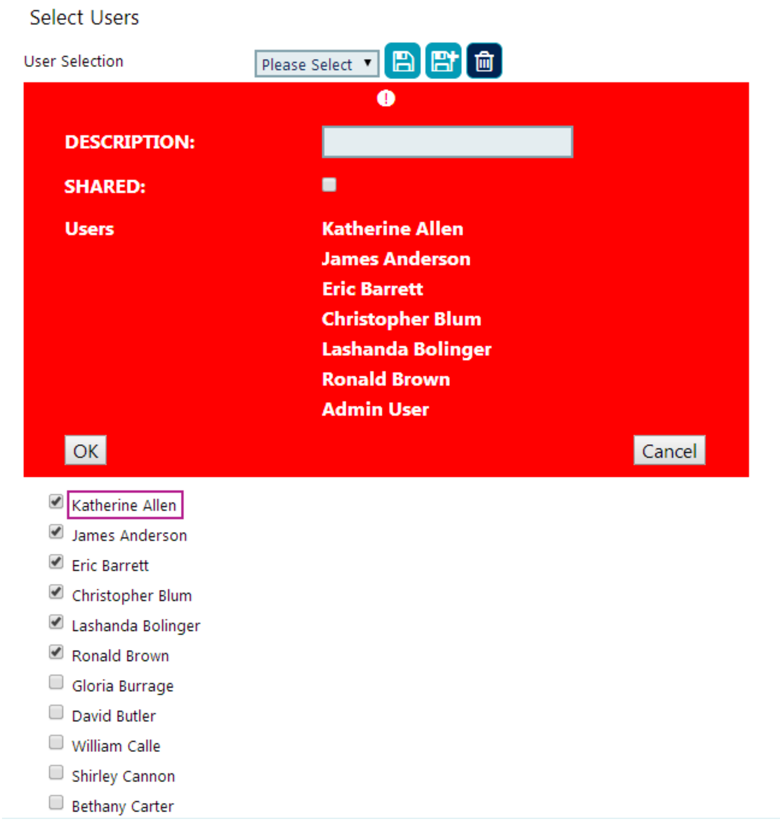


Figure 221: Creating user selections

If you wish to create a copy of another user's user selection, select it from the drop-down box and click the **Save As** icon, give it a new name and click OK.

The graph will plot a line per selected user. Selecting the users at the bottom of the page will toggle the display of the selected user in the graph. The circles drawn on the lines indicate assessments taken by the users and viewed knowledge nudges. Hovering the mouse over the circles will show a label listing the taken assessment.

The bottom of the page also includes a slider which can be resized and moved to increase/decrease the level of detail displayed by the graph.

25.11 Update Routing Skills from DNA

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

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

Tempates are required to create links between DNA items and CME Skills. Click the **New Template** button, set its name and click OK to create a new template.

The DNA components and CME Skills need to be **linked** in the right table. In this example the **sales** DNA has been linked to the **WFM_Gold** skill. To link items, select the DNA from the left table and tick the related skill/skills in the middle table, then click the right arrow button.

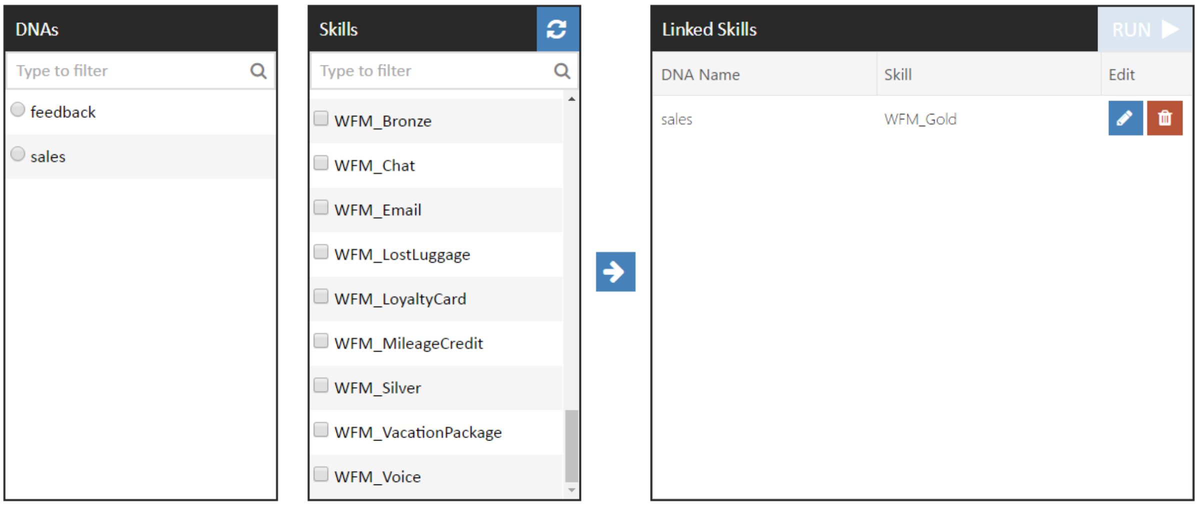


Figure 222: Linking DNA components and CME skills

Click the Edit icon in the Linked Skills table to specify whether skills are directly mapped or whether the DNA results provide a scale to match the proficiency levels in CME.

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

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

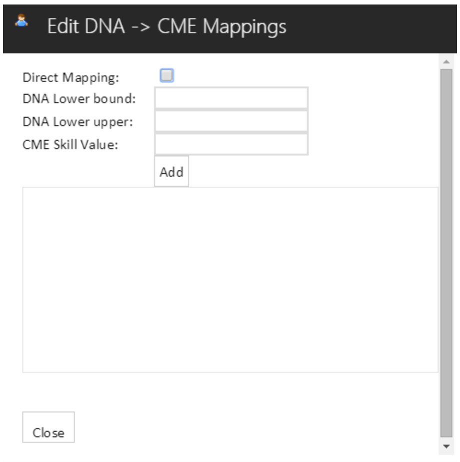


Figure 223: Setting skill link properties

Click on **Run** to update the CME Skill levels.

Before importing the new Skill levels to CME you can preview the skill levels by clicking Preview. Once you are satisfied that the skill levels are accurate, click **Import**.

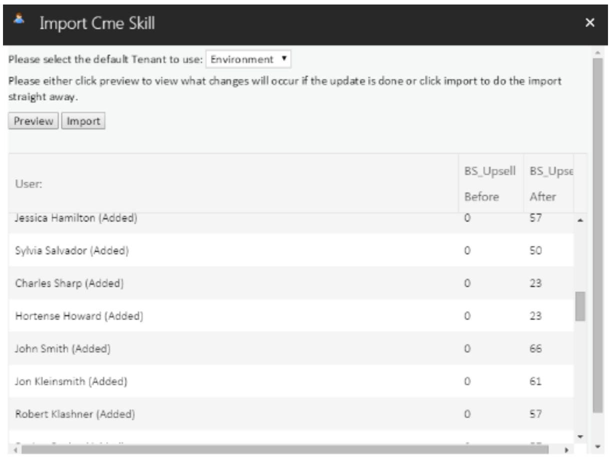


Figure 224: Previewing the CME skill levels

26 SkillsAnalysis

Thhe SkillsAnalysis page enables you to correllate performance with learning interventions, and coorelate performance in one area against another. Sessions can be saved for future reference.

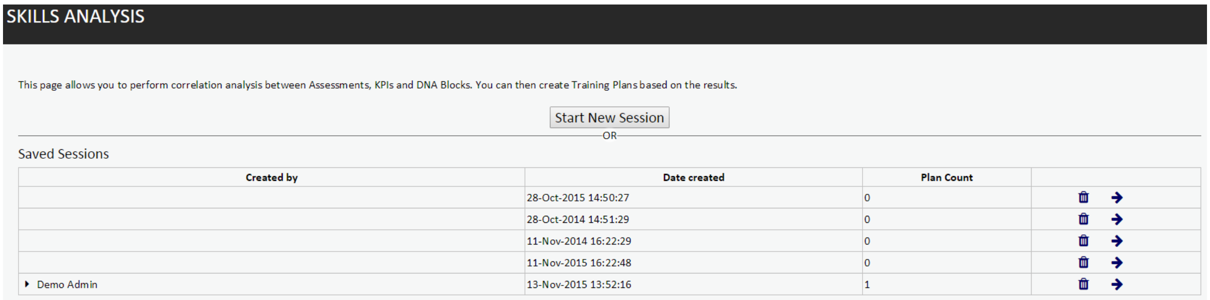


Figure 225: Skills Analysis Page

To begin a new Session, follow the following steps:

1. **Choose items to Analyse**.

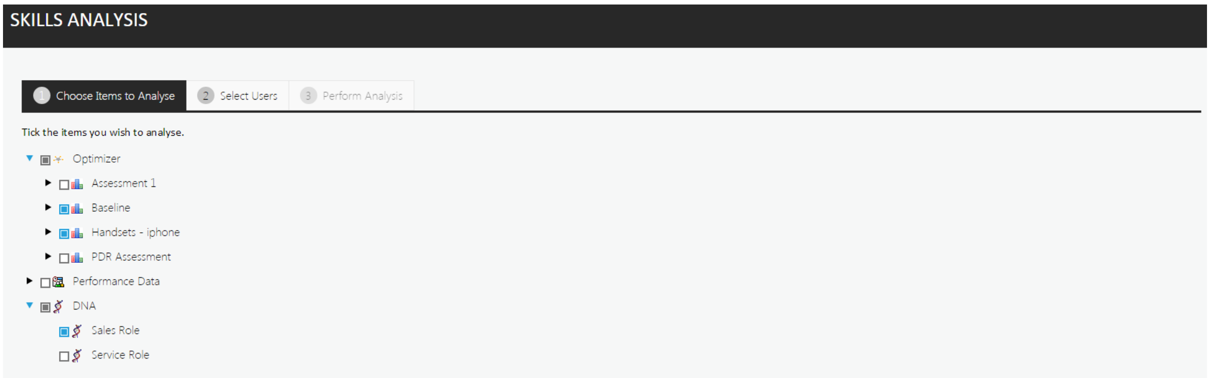


Figure 226: Choose items to analyse

- Optimizer – Assessment data
- Performance Data – DNA Component / KPI
- DNA – DNA Blocks or DNA Roles

Select the items that you wish to correlate.

2. **Select Users** from the hierarchy. It is possible to select all users or specific users. In the following example a particular manager has been selected, which would select all members of this manager's team.

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

Figure 227: Select users

3. **Perform Analysis**, to perform the corrolation analysis on the select data types for the selected user(s), click **Run Analysis**.

Figure 228: Data analysis

To view the **Analysis Results,** click on the arrow at the end of the session details.

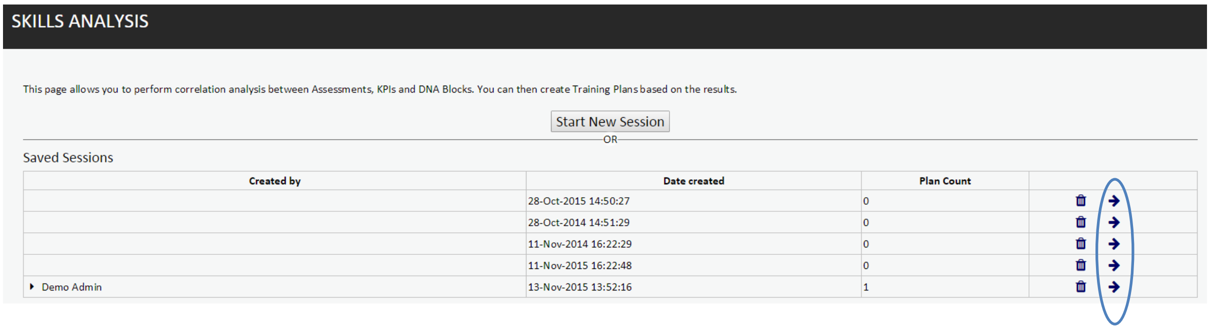


Figure 229: Data analysis

Three options are available for viewing the correlation results on the **Correlations** page. The following example shows the **Best Correlations** option**.** The higher the correlation, the stronger the influence on the output.

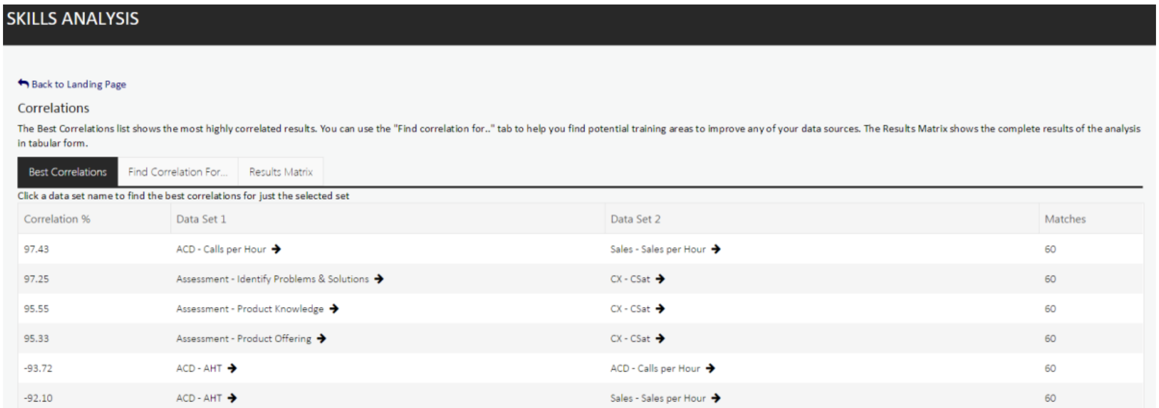


Figure 230: Analysis results

The **Find Correlation For…** option allows a specific data set to be selected to view the correlation results.

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

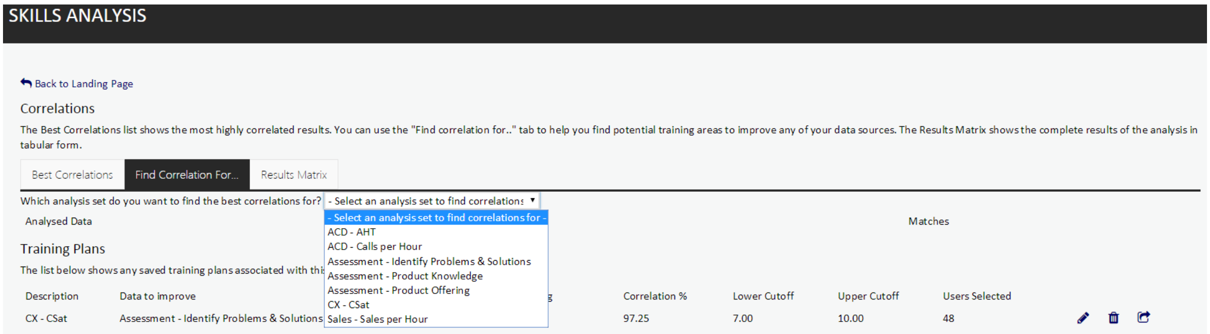
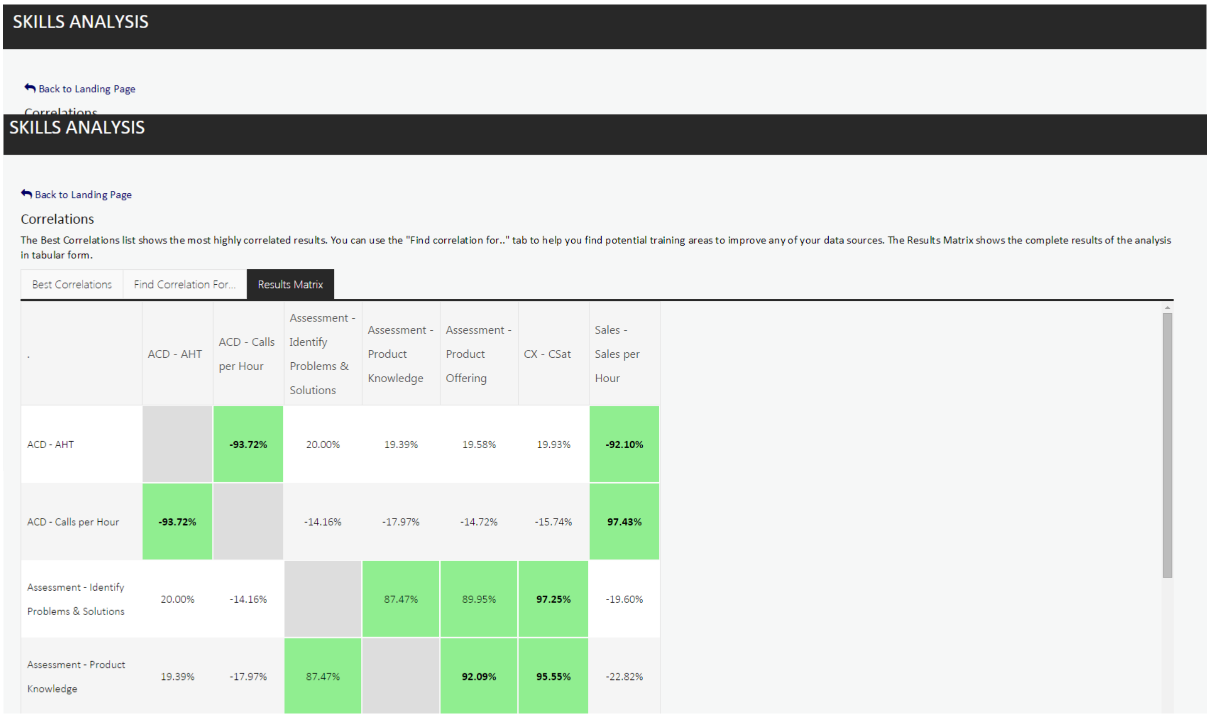


Figure 231: Viewing correlation results for a specific data set

In the following example Customer Satisfation (CSat) has been selected with all correlation results:

Figure 232: Viewing correlation results for a specific data set



The third option, shown below, is to to view the **Results Matrix** as a heat map view, with the highest (strongest) correlation results highlighted in green.

Figure 233: Results matrix

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

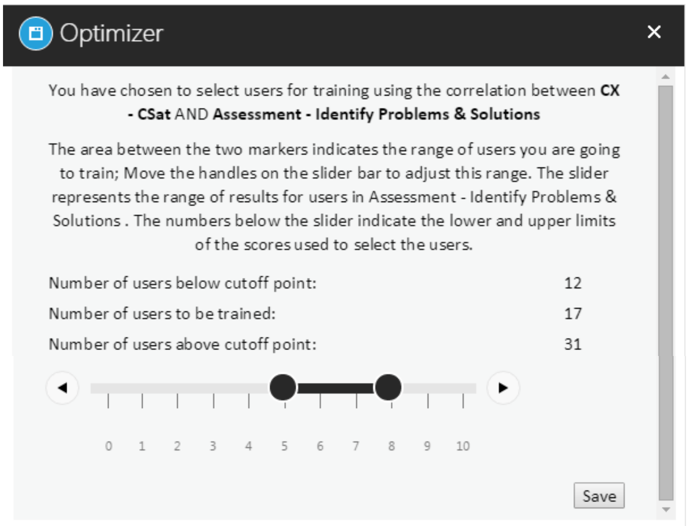


Figure 234: Selecting users for training based on results

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

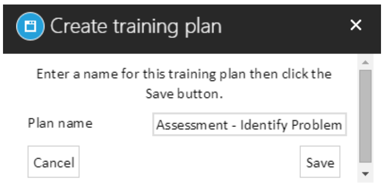


Figure 235: Saving the training plan

27 Personal Development Review

The PDR feature allows employees to define a set of personal development objectives and agree to them with a manager. Once objectives have been approved, employees can submit files to demonstrate that the objectives have been completed. Managers can also create, delete, approve and complete objectives (i.e. set the statuses to ‘completed’). Managers can then combine the results of the PDR Potential Assessment and the achieved objective targets to give the employee a score on the talent matrix.

There are three pages of PDR features: **PDR**, **PDR Dashboard** and **PDR Admin**. The PDR and PDR Dashboard pages are in the User section of the menu. The PDR Admin page is in the Admin section of the navigation menu.

These pages will not automatically be assigned to user roles, so it is recommended that the Manager role is granted access to the PDR Dashboard page and the User role is granted access to the PDR page. Administrators and/or managers should be granted access to the PDR Admin page in order to support the management of review periods.

The PDR page is primarily for employees to define their development objectives, whilst the dashboard allows managers to create, edit, approve and monitor the status of their reports’ PDRs.

27.1 Setting the number of objective targets for users

The number of targets that appear in users’ PDR pages is one by default for all users, however, this can be modified on a per-user basis. Follow the steps below if you wish to change the number of targets (per objective) users will see in their PDR page:

1. Login as a system administrator
2. Select the System Settings page
3. Create a new user field to store the value for the number of PDR targets
4. Select the general settings tab
5. Set the user field for PDR target counts to the new PDR user field
6. Populate the user field for users either by importing a spreadsheet of users that includes a value for the PDR field or by editing existing users in the **Users & Hierarchy** widget and setting a value for their PDR target counts field

27.2 PDR Page

The PDR widget is divided into 5 tabs by default: **Environmental**, **Finance**, **Vision**, **Operating Efficiency** and **Customer**. It is possible to define multiple objectives within each of these tabs. Select one of the tabs and click the **Add Objective** button to create a new objective. The new objective will appear as ‘Objective 1’, followed by **Objective Detail** and **How will this be achieved** fields. The target can then be set by selecting either **Goal** or **Measured** from the **Target type** field.

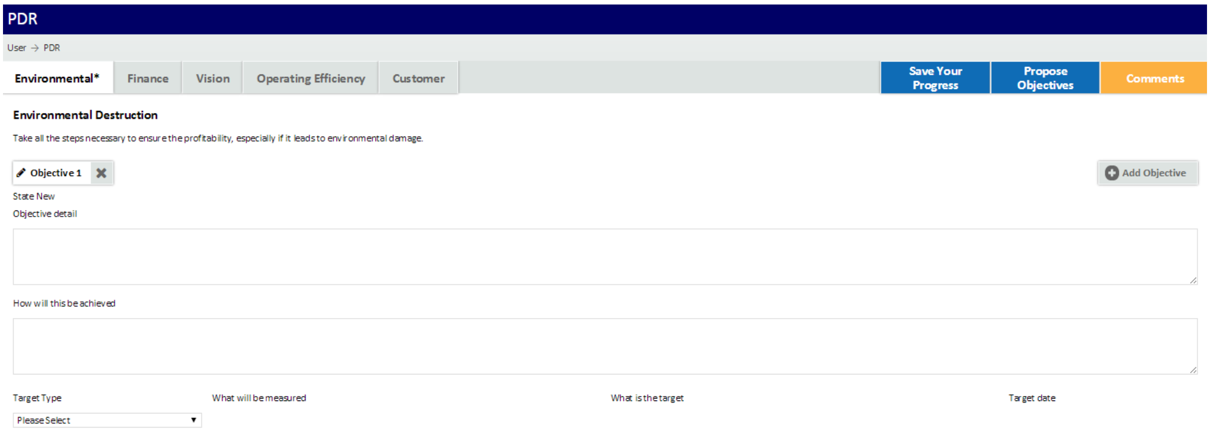


Figure 236: Creating objectives

The **Goal** objective type will require the user to enter content in the **What will be measured**, **What is the target** and **Target date** fields.

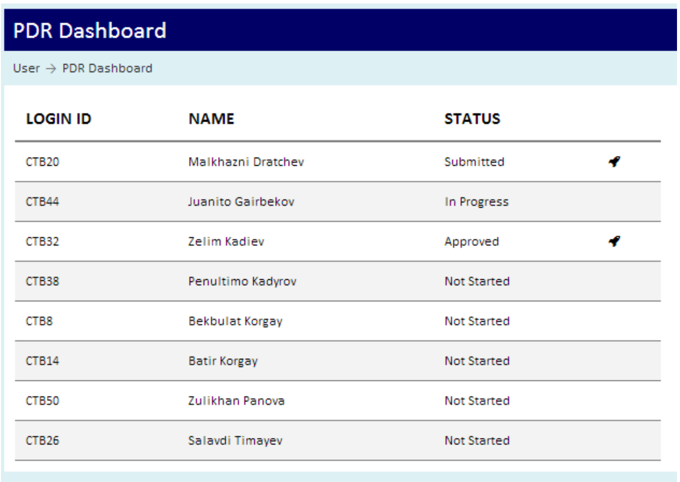
The **Measured** objective type includes the same options, except that the **What will be measured** element allows for the selection of a KPI/DNA component rather than free text.

The **Save your progress** button will become enabled once there are unsaved changes in the PDR, and allows the user to save the current state of their PDR. Clicking the **Propose Objectives** button will update the state of the new objectives to 'pending approval'. They will then become visible to the user's manager. The manager can then make changes to the objectives, delete them and approve them.

It is possible to continue adding and proposing new objectives after the initial set have been proposed to the manager. The manager will then have to review the new objectives and decide whether to delete, modify and/or approve them.

27.3 PDR Dashboard Page

Managers can view the status of their reports' PDRs, as well as edit and approve PDR objectives submitted by their reports via the **PDR Dashboard** widget.


PDR Dashboard
User → PDR Dashboard

LOGIN ID	NAME	STATUS
CTB20	Malkhazni Dratchev	Submitted
CTB44	Juanito Gairbekov	In Progress
CTB32	Zelim Kadiev	Approved
CTB38	Penultimo Kadyrov	Not Started
CTB8	Bekbulat Korgay	Not Started
CTB14	Batir Korgay	Not Started
CTB50	Zulikhan Panova	Not Started
CTB26	Salavdi Timayev	Not Started

Figure 237: PDR Dashboard

Selecting the **PDR Dashboard** widget from the navigation menu will display the logged-in manager's list of direct reports, including their Login IDs, names and PDR statuses. The status column will contain either: **Not started**, **In Progress** (there are objectives that have yet to be submitted to the manager for approval), **Submitted for Approval** (available for review and approval by the manager) or **Approved** (all objectives have been approved/deleted by the manager). Submitted objectives can be edited by the manager prior to approval. Once the employee submits an objective, they can no longer make changes to the objective detail, how will this be achieved, or target type sections. Similarly, the manager will be able to make changes to submitted objectives up until they are approved.

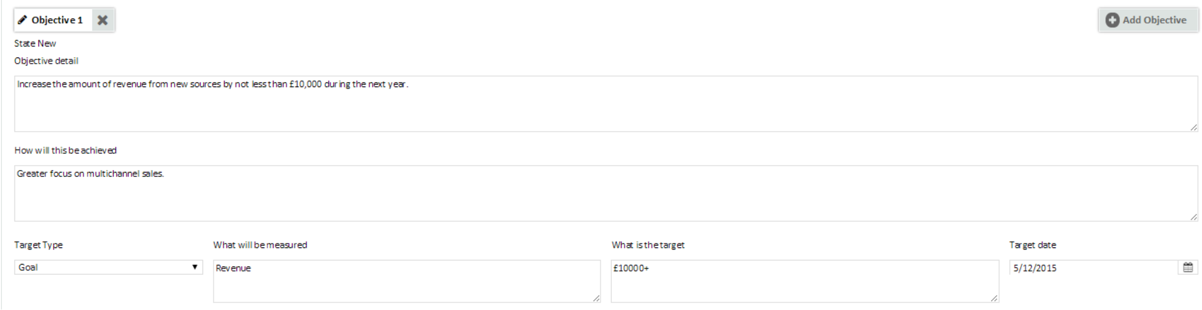


Figure 238: Creating an objective

Once an objective has been approved both the agent and the manager will be able to add comments and evidence file uploads to the objective.

Figure 239: Adding comments and evidence file uploads

27.3.1 Objective Actions Screen

The objective actions screen lists all objectives with labels on the left side indicating each objective's PDR section (e.g. Environmental, Finance etc.). Click on the title of the Objective to expanded to show further detail. Objectives that are pending approval can be approved or deleted via the tick and cross icons on the right. Objective details can also be edited for objectives that are pending approval by making changes to the relevant elements and clicking the **Save Your Progress** button.

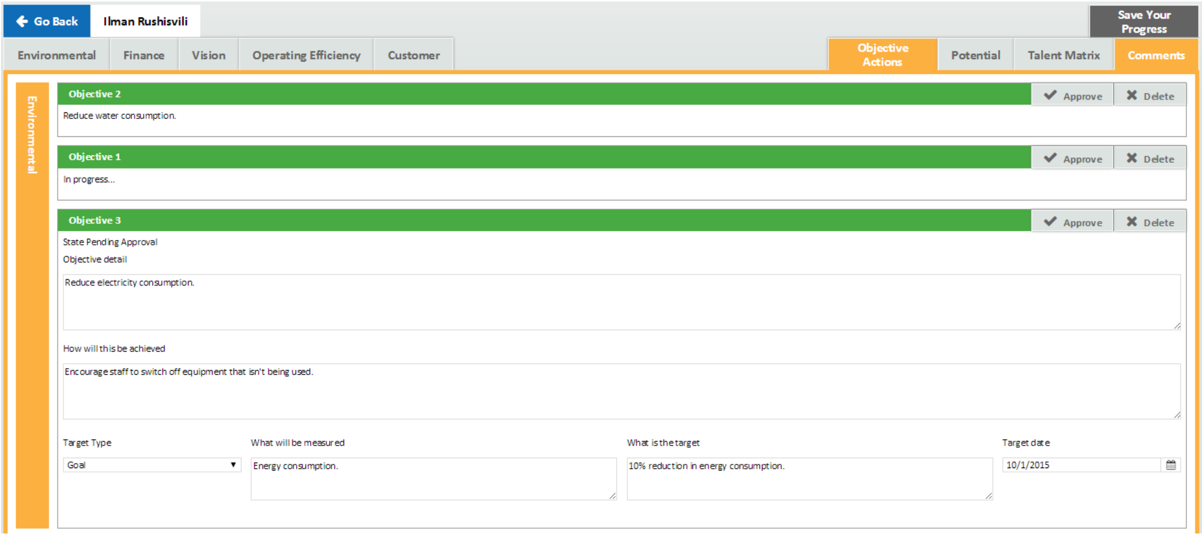


Figure 240: Objective actions screen

Tasks that have been approved can also be set to **Complete** status in this screen by selecting the appropriate Target rating (based on which target level the employee achieved) and clicking the Complete checkbox. Once an objective has been set to complete it can be moved back to approved status by unchecking the **Complete** checkbox.

27.3.1.1 Potential tab

The **Potential** tab within the PDR Dashboard page allows managers to complete the PDR Potential Assessment for their reports. The questions that appear in this tab are based on the assessment selected in the PDR Admin page. The scores selected in this tab will affect the report's potential value in the Talent Matrix tab.

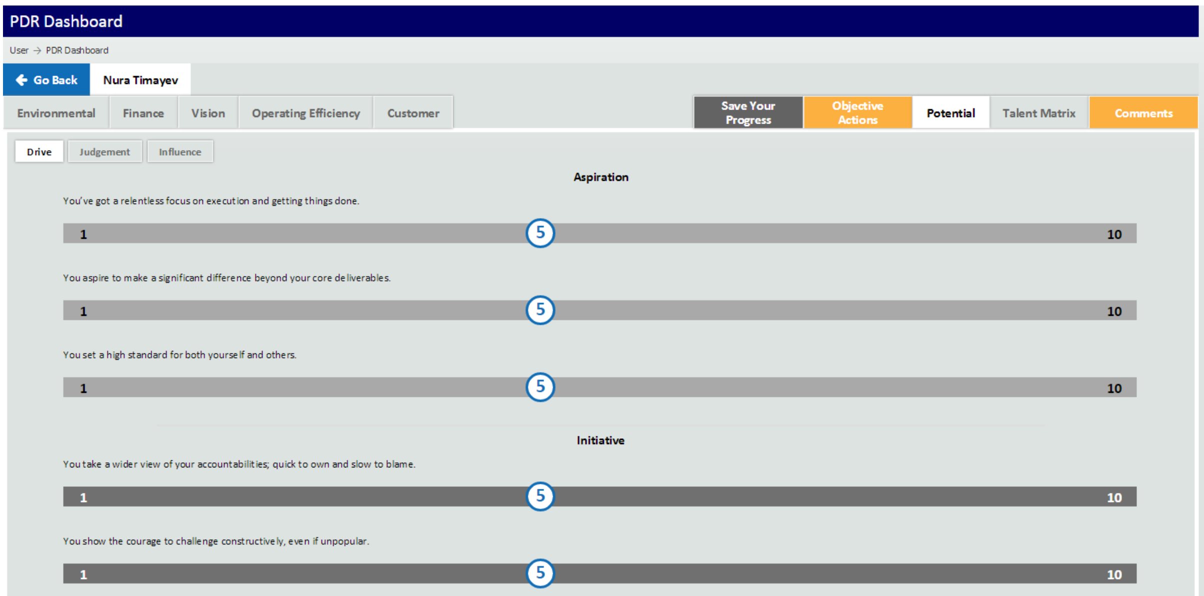


Figure 241: Potential tab

27.3.1.2 Talent Matrix Tab

The talent matrix tab combines an employee's potential score (based on the values selected in the Potential tab) and the employee's objective performance (based on the level achieved for defined objectives). If all of the user's PDR objectives are measured, a recommended score will be displayed in the top-right area of the page. This score is based on the combination of the extent to which the user has achieved their objectives and the values specified in the Potential assessment. If the recommended rating is shown and the manager opts to override this recommendation, a comment will be required prior to saving. This should be entered into the comments box.

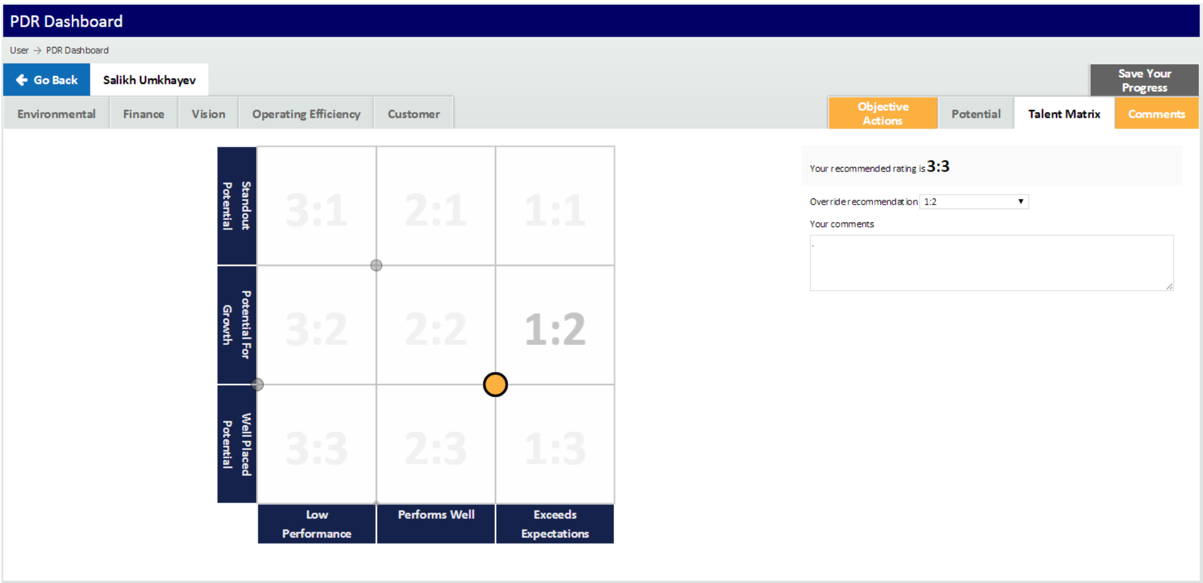


Figure 242: Talent Matrix tab

The **Save Matrix Position** button will be visible if the manager accesses the Talent Matrix tab for an employee's PDR within a review window (see the following section for creating review windows). Saving the Matrix position creates a historical snapshot of the employee's current position on the talent matrix. These snapshots are displayed on the talent matrix grid via grey circles. The orange circle indicates the employee's current position, the largest grey circle indicates the most recently taken snapshot, with smaller circles indicating the employee's past position(s) on the talent matrix.

27.4 PDR Admin Page

27.4.1 PDR Potential Assessment

The PDR Admin page allows for the setting of the **PDR Potential Assessment** that will be assigned to employees as part of the PDR process. The information gained from completed PDR assessments will then be used as an input into the talent matrix feature. To select an assessment, select an assessment from the PDR Potential Assessment dropdown and click the Save icon. **Note**: Only assessments that are set to feedback only with a deployment type of **self only** will be available in the dropdown.

27.4.2 PDR Defined Review Windows

PDR administrators are also able to define review windows. These are pairs of dates that can be used to define the date ranges during which PDR reviews may occur. It is only possible to save Talent Matrix snapshots during a review window.

27.4.3 PDR Email Notifications

The PDR functionality includes the option for email notifications for managers when certain events occur. These options are available from the PDR Admin page.

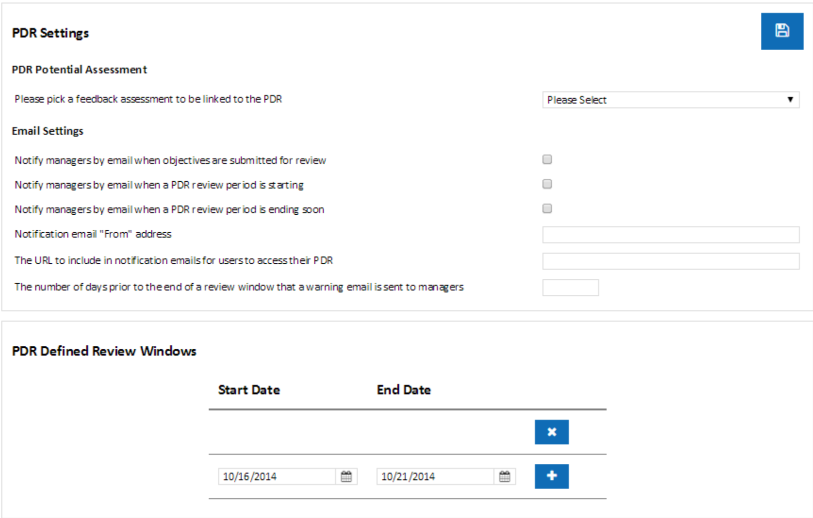


Figure 243: PDR Admin Page Settings

It is possible to enable email notifications for managers when the following events occur:

- A manager's reports submits objectives for review
- A PDR review period is starting
- A PDR review period is ending

Additionally, this page allows the user to set the 'from' address for all email notifications, a URL to include with the notifications, and the number of days prior to the end of a review window that the notification should be sent.

27.5 Feature notes

27.5.1 PDR Dashboard Widget

- Managers will only be able to see the PDRs of users who are directly below them in the hierarchy.
- Any objectives that are created by the manager will initially have their state set to 'pending approval', rather than new.
- Objectives that are new will not be visible to the manager until they have been submitted by the user.
- Deleted objectives are hidden from both the employee and their manager.

The PDR Potential Assessment will be available to managers when viewing their reports' PDRs. The assessment should **not** be manually assigned to Optimizer users.

28 Appendix 1: Optional components

Optimizer includes several additional components that provide the ability to:

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

Please refer to the corresponding install/upgrade guides for installation instructions for each of these components.

28.1 DNA Import Service

Automatic import of new KPI spreadsheets by copying them into the folder of your choice can be enabled with the DNA Import **Service**. The setup of this service requires the definition of a KPI import folder (e.g. "C:\KPI_Imports") and an archive folder (e.g. "C:\KPI_Archive"). Copying a KPI spreadsheet into the import folder will enable the service to automatically import the data into Optimizer and then move the file into the archive folder. The file will be renamed prior to being moved to the archive folder in order to prevent naming conflicts. This removes the need to import KPI data manually through the Optimizer **Manage KPI** page.

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

28.2 Learning Item Auto-Assignment Application

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

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

28.3 Learning Item Auto-Ranking Application

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

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

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

28.4 LMS Learning Item Integration

The LMS learning item integration feature allows Optimizer administrators to assign Optimizer assessments to LMS users (JZero and Scaffold LMS are currently supported). These assessments can then be viewed and launched from the LMS.

To create an LMS learning item:

1. Click on the **Learning Items** page
2. Click the **Create Learning Item** link
3. Select **LMS Course** from the **Type** select box.
4. An LMS hierarchy containing the courses will then appear and allow a course to be selected.
5. Click **Save** to complete the creation of the learning item.

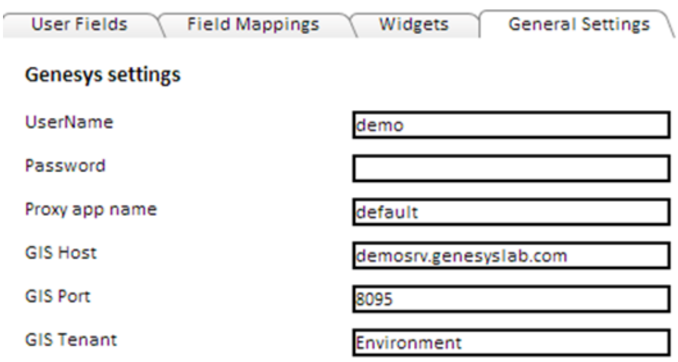
LMS learning items can be assigned to users and DNA components in the same way as other learning item types.

Note: LMS course learning items can only be assigned to LMS users who are mapped to a valid LMS user (via the user field defined for the LMS integration feature).

28.5 Configuring GIS Authentication

In Optimizer, open the **System Settings** page and select the **General Settings** tab. Here, you'll see the settings you need to configure GIS integration.

Note that these options are not visible until you've made the database change mentioned previously.



- The GIS tenant will vary depending on your installation, but for a single tenant GIS it should be Environment.
- Typically the proxy app name can be left as default.

- The user name and password provided here are only used for the Skills Route part of the application. If Optimizer is configured to use GIS as an authentication source, the username and password of the user who is logging in is used instead of these values.
- The GIS host and GIS port can be found by launching the status page from the Genesys server, and checking the URL – the port will be shown as a number after a colon following the host name. The Status Page should be accessible in the Start menu in **Genesys Solutions** > **Genesys Integration Server** > **SOAP** > **Status Page** (or OS equivalent).

  In the example below, the host is **demosrv.genesyslab.com** and the port is **8095**.
- Save the changes once you've completed all the fields.

The "Update Routing Skills" page in the Administration > DNA menu should now work as per the documentation.