GENESYS™

Skills Assessor 8.5.648

Manager User Guide

About Genesys

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

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1 Overview

This Manager Guide has been designed to walk the user through the use and navigation of the Skills Assessor application.

1 Logging In

Skills Assessor 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.

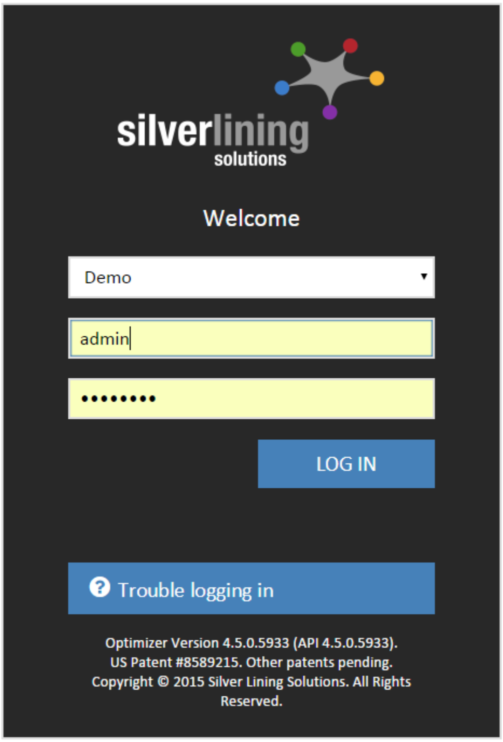


Figure 1: Log in screen

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

The My Development screen will be displayed, containing any assessments that have been assigned.

If any of the assessments have been given a completion date, the date will be listed in the **Date By** column.

2 Taking an Assessment

Any assessments that have been assigned will be visible under My Development page.

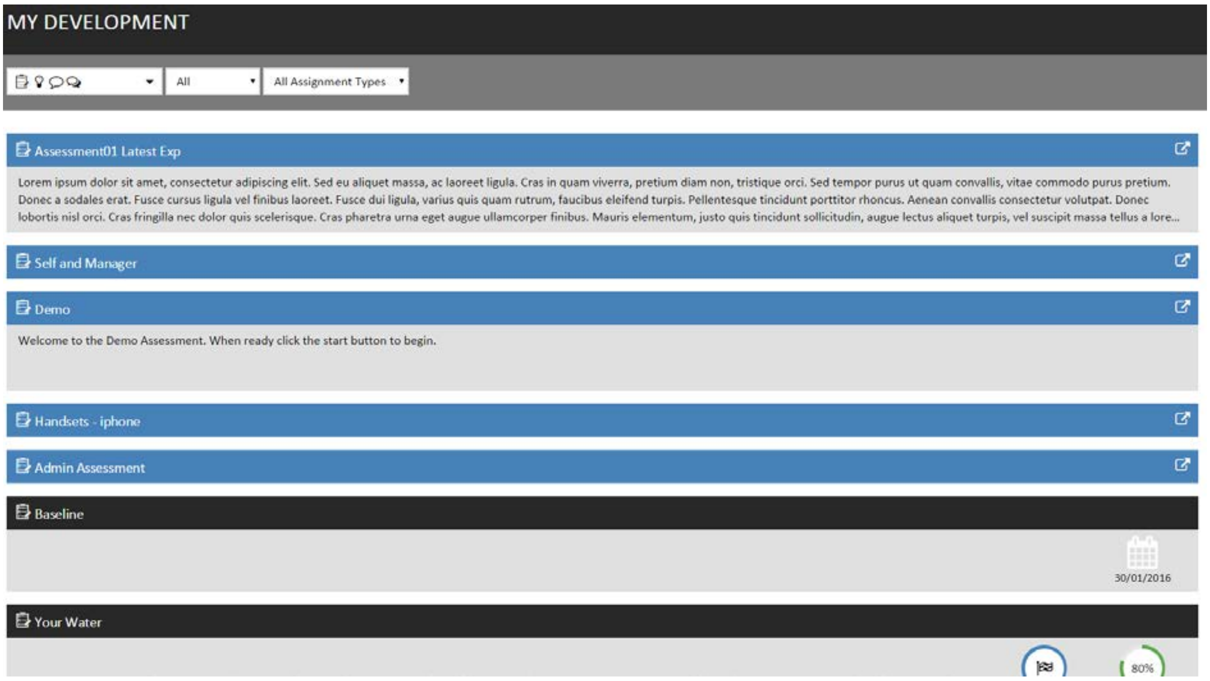
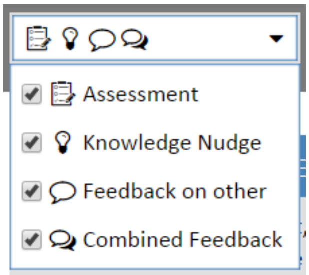


Figure 2: Assessments on the My Development Screen

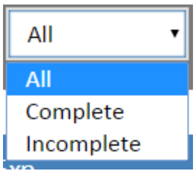
Active Assessments are presented at the top of the list. Under each Assessment a snippet of any introduction text is also displayed enbling the user to quickly see key information regarding the Assessment.

The list can be filtered using the 3 drop down menus at the top of the page.

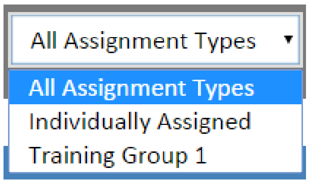
Assessment Style



Assessment Status



Assessment type



Assessment Style:

- Assessment – Standard Assessments are typically used as a knowledge check to assess the users understanding of a specific subject.
- Knowledge Nudge – This is a piece of learning that has been assigned to the user. This can be in the form of an e-learning course, document, referal to a web site or knowledge base.
- Feedback on others – This is used when requesting feed back on peers and is typically used for 360º feedback reviews.
- Combined Feedback – this is typically used for employee review periods / 1-2-1's and requires both the Agent and Manager scores, which form the basis for the review

conversation. Once the scores have been agreed and signed by both parties the final ratings are recorded.

Assessment Types

- Individually Assigned – these are Assessments that have been directly assigned to the user.
- Group Assigned – these Assessments have been automatically assigned based on the user being part of a Group. Groups are used to filter users for reporting and Assessment purposes. For example new recriuts could be added to the Induction Group, in doing this all of the induction specific Assessments are automatically assigned to the users.

When assigning Assessments specific date ranges or completion dates can be applied to the Assesment. Assessments with dates applied will be displayed with a calendar icon and the completion date. If the current date is within the Assessment date range then the Assessment will be listed as part of the active Assessments, if the current date is before the date range the Assessment will be listed with the completed / inactive Assessments.

The below example shows the Baseline Assessment that have been assigned with a date range that is in the future.

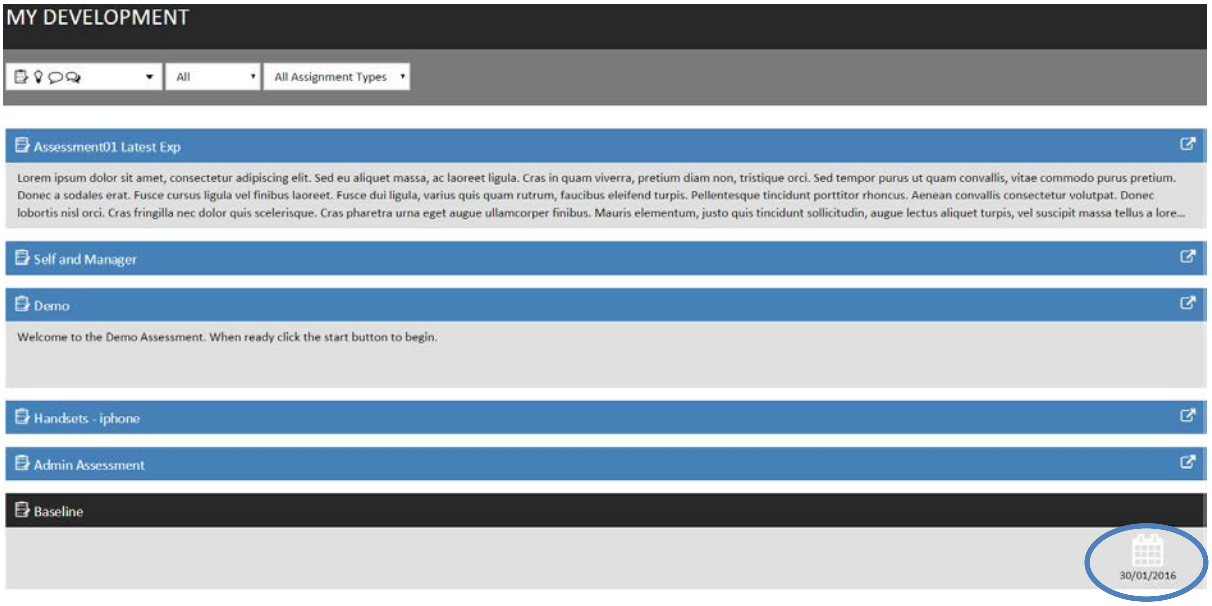


Figure 3: Assessment with dates

Once started, an Assessment will display a completion icon and the percentage completed so far. The below example shows that the Demo Assessment is 75% complete.

Figure 4: Assessment Completion

To start taking an assessment, click the name or launch icon .This will display a screen similar to the one below.

Figure 5: Launching an Assessment

Based on the content of the Assessment a number of informational icons may be displayed under the Assessment name. When clicked on the icon will reveal additional information around playing media, timed Assessments, question timing and navigation.

Below is an example of the information available when the Assessment contain audio or video clips.

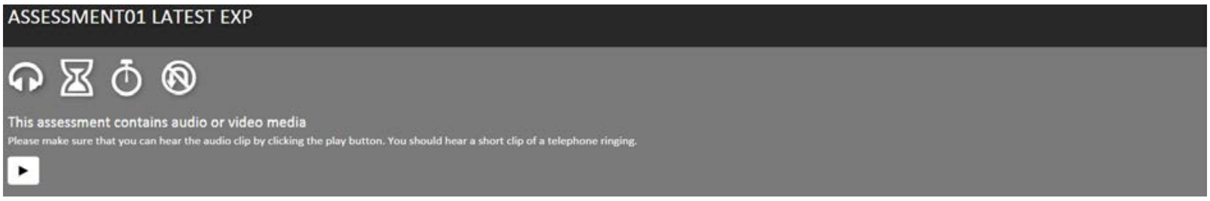


Figure 6: Media information

The following examples are displayed when either the Assessment or Individual questions are being timed.

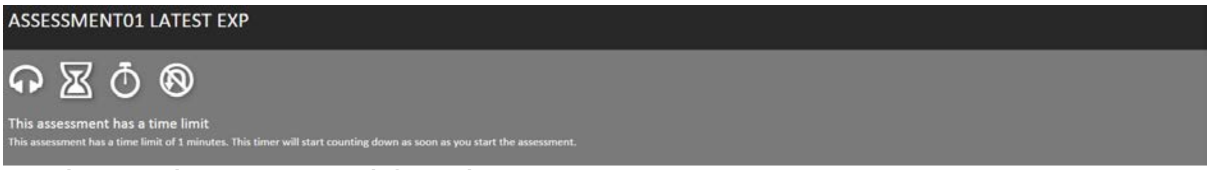


Figure 7: Time Assessment information

Figure 8: Question time recorded

The final example is displayed when an Assessment can only be taken in the order that it was created and any skipped questions can't be revisited.

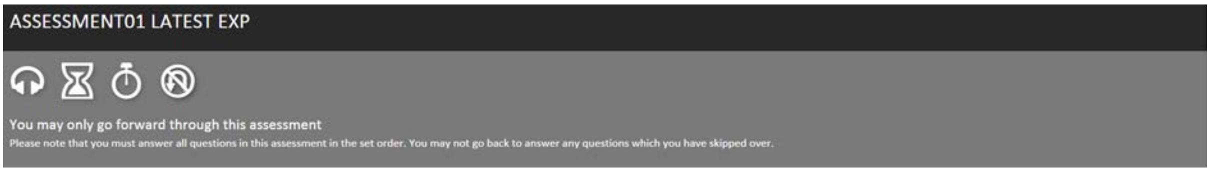


Figure 9: Forward only navigation.

If a Knowledge Nudge have been assigned to the Assessment then the following will be displayed.

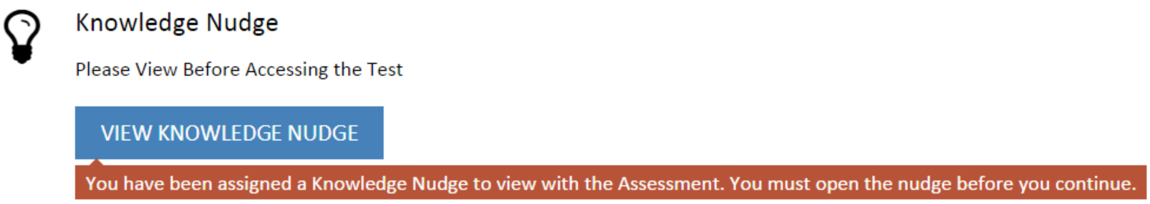


Figure 10: Knowledge Nudge Information.

A Knowledge Nudge can be either a document, website or e-learning that the user must read, visit or watch before taking the Assessment. The following Assessment could be a series of questions to test the users understanding of the Knowledge Nudge content or simple Feedback form.

It is important to remember that the Assessment can't be started until the Knowledge Nudge has been opened and closed.

Once ready to take the Assessment click on the Start button to begin.

When the Assessment has been completed it will be move to the bottom of the users My Development page and will display both the finished icon and the percentage score.

3 Types of Assessments

There are three types of assessments:

Timed – This type of assessment has to be completed in one session, and a clock in the top-left corner of the window will indicate the time available to complete the assessment.

Not Timed – This type of assessment can be accessed more than once, allowing completion at any time before the completion date.

Feedback – For this type of assessment, individuals rate themselves against specific criteria.

Feedback assessments can be set to different deployment modes which control who the assessment is assigned to, e.g. **self only** or **self and manager**. If an assessment is set to the **self and manager** deployment mode, both users will be required to complete a combined feedback assessment together and for this assessment to be signed (via user password) before it is recorded in the system. If a **self and manager** assessment has been set to only require user feedback before a combined test, the manager will have the option of initiating a combined feedback test without having previously completed their individual feedback assessment.

3.1 Timed and Untimed Assessments

To start taking an assessment, click the name, as shown below.

If the assessment is timed, the time allowed will be displayed in the top-left corner of the window.

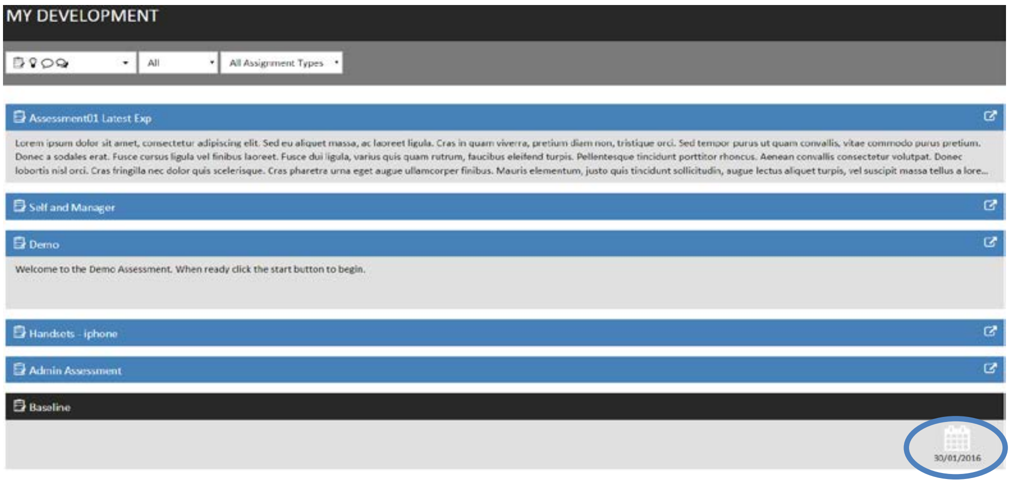


Figure 11: List of assessments

This will display a screen similar to the one shown in the following image.

At the bottom of the screen is an option to check that any audio can be heard. Click the **Play** button to check this.

When you are ready to take the assessment, click **Start**. To close the assessment and take it later, click **Close**.

Figure 12: Starting an assessment

3.1.1 Question Examples

There are different types of assessments and questions. If the Navigator appears on the top of the window, you can click a question number jump to a specific question or the Prev(ious) and Next buttons to move back and forward through the Assessment.

If the assessment is timed, the time remaining will be displayed between the navigation bar and the Question.

Figure 13: The Navigator

Follow the instructions for each of the questions, and after selecting the answer, click Next to move to the next question. After each question has been completed, the Navigator will be updated (if available) to indicate which questions have been completed.

There are 6 different question types that can be used during an Assessment:

- Multiple Choice – pick 1 correct answer from the list.
- Pick Correct – pick multiple correct answers from the list.
- Hot Spot – mark the answer on an image with a 'pin.'
- Text – asnwer using a simple word or phrase.
- Numeric – answer using a numberic value.
- Feedback – provided a rating between x and y.

Each question may also contain additional content such as:

- A link to a website

- An image
- A video clip

Multiple Choice

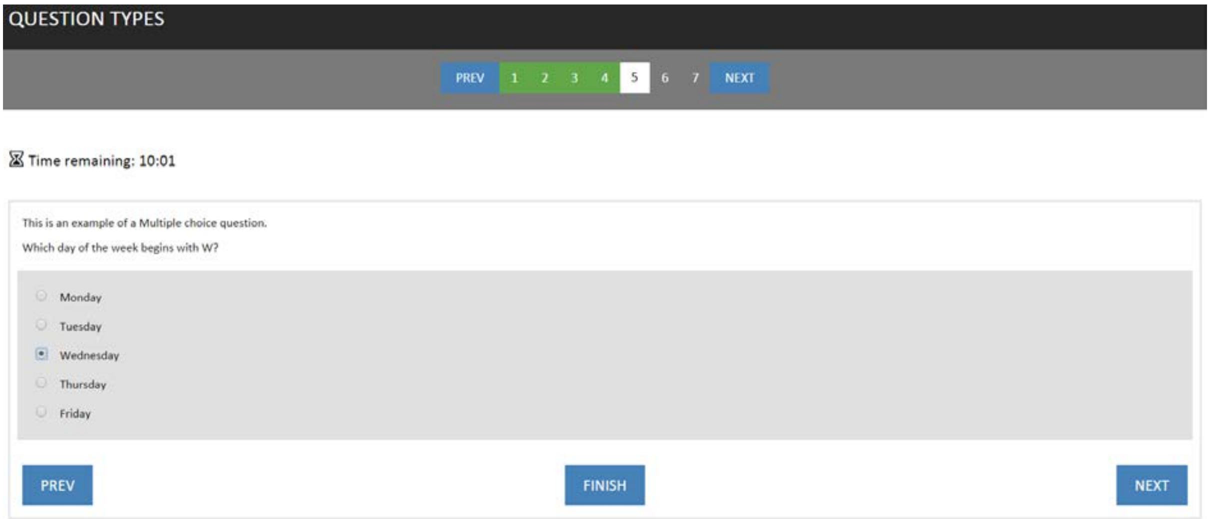


Figure 14: Multiple Choice question

A Multiple choice question may contain multiple answer but only 1 can be selected as your answer.

Pick Correct

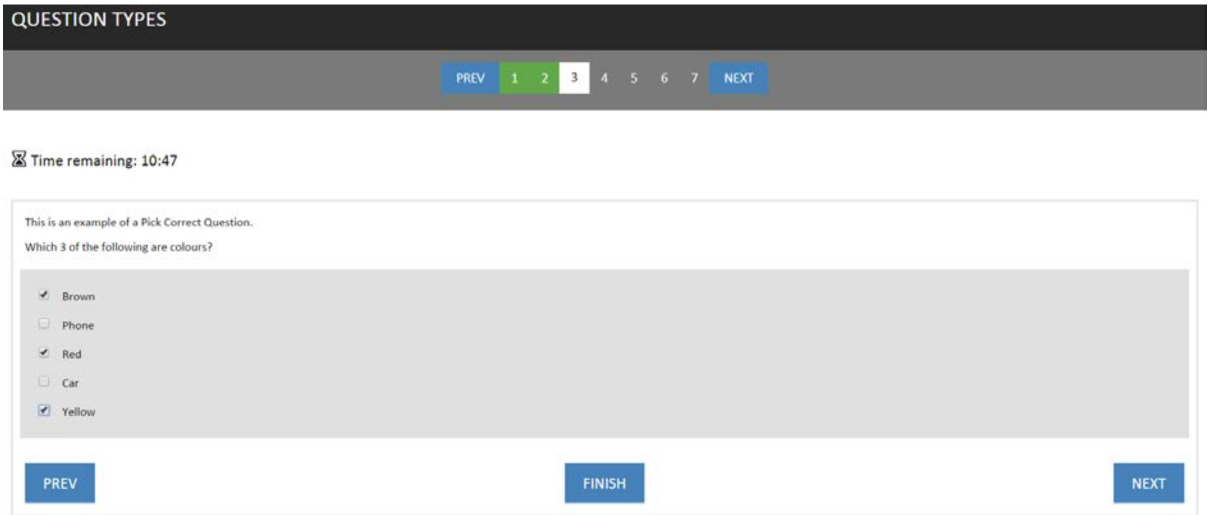


Figure 15: Pick Correct question

With Pick Correct question you have the ability to select multiple answers, as you can see from the example above.

Not all questions will specifically ask for X correct answers so it is important to remember when the answers use a 'check box' ☑ you are able to select more than one answer. If the answers are marked with a radio button ❍ then the question is a Multiple Choice and only 1 answer can be selected.

Hot Spot

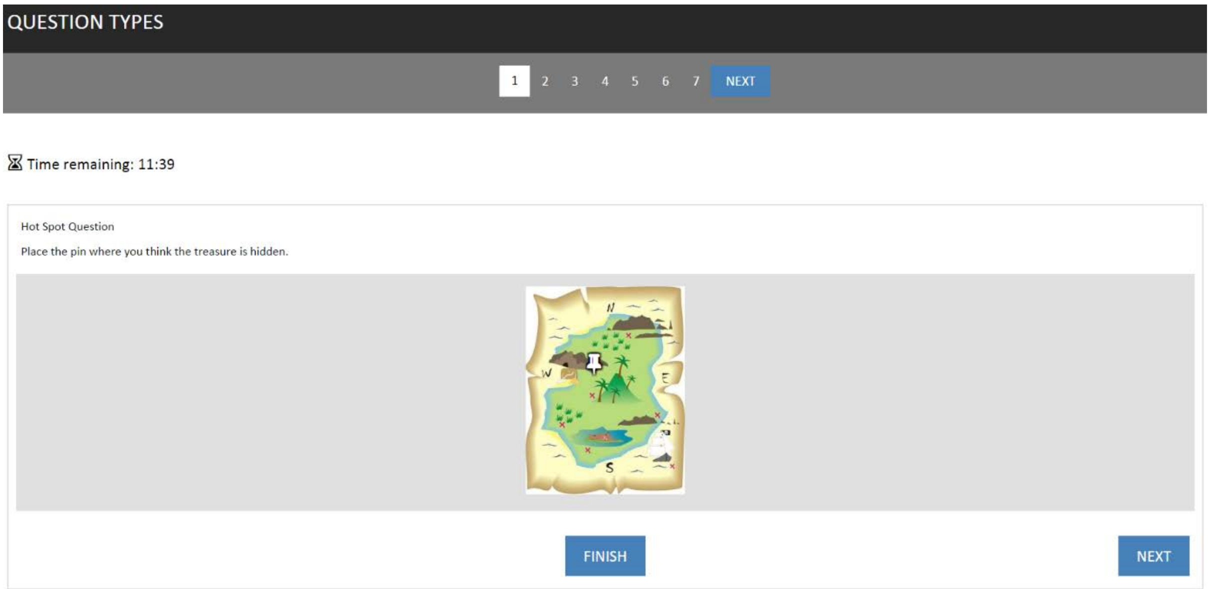


Figure 16: Pick Correct question

Hot Spot questions test you understanding by asking you to identify a specific item ion a picture. This could be along the lines of ‘Please identify the power button on our new product.’ In the example above the question is just for fun and you have to guess where the treasure has been buried.

Text

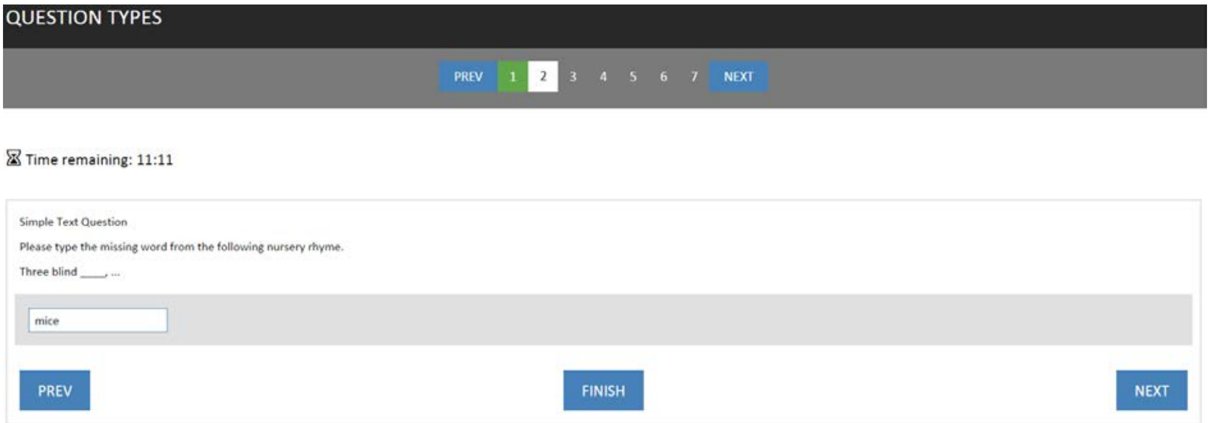


Figure 17: Text question

Text questions require you to provide either a single work or simple phrase to assess whether you know the correct term, name or phrase.

Numeric

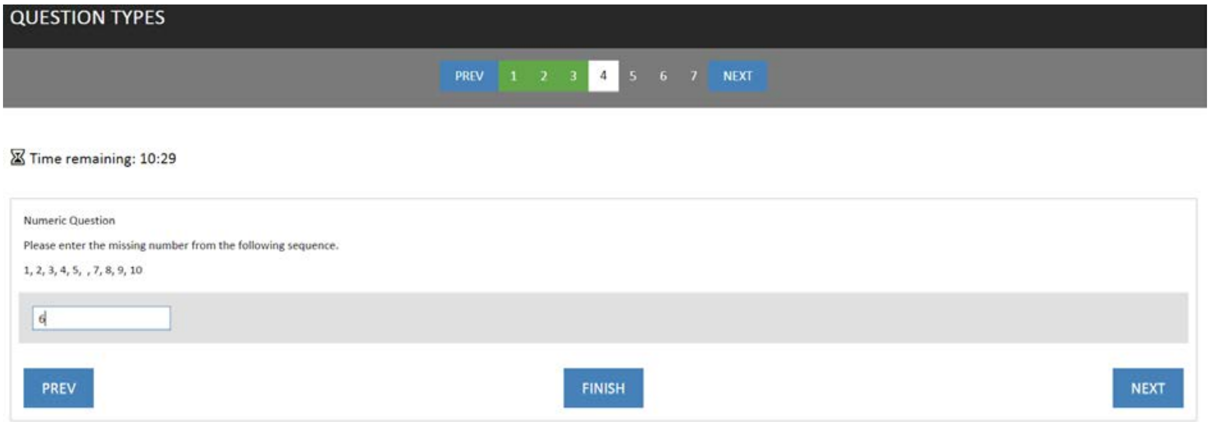


Figure 18: Numeric question

Numeric questions are similar to Text questions only the answer is a number. This might be used to assess whether you know the price of a new product or the maximum fine if there has been a breach of regulations.

Feedback

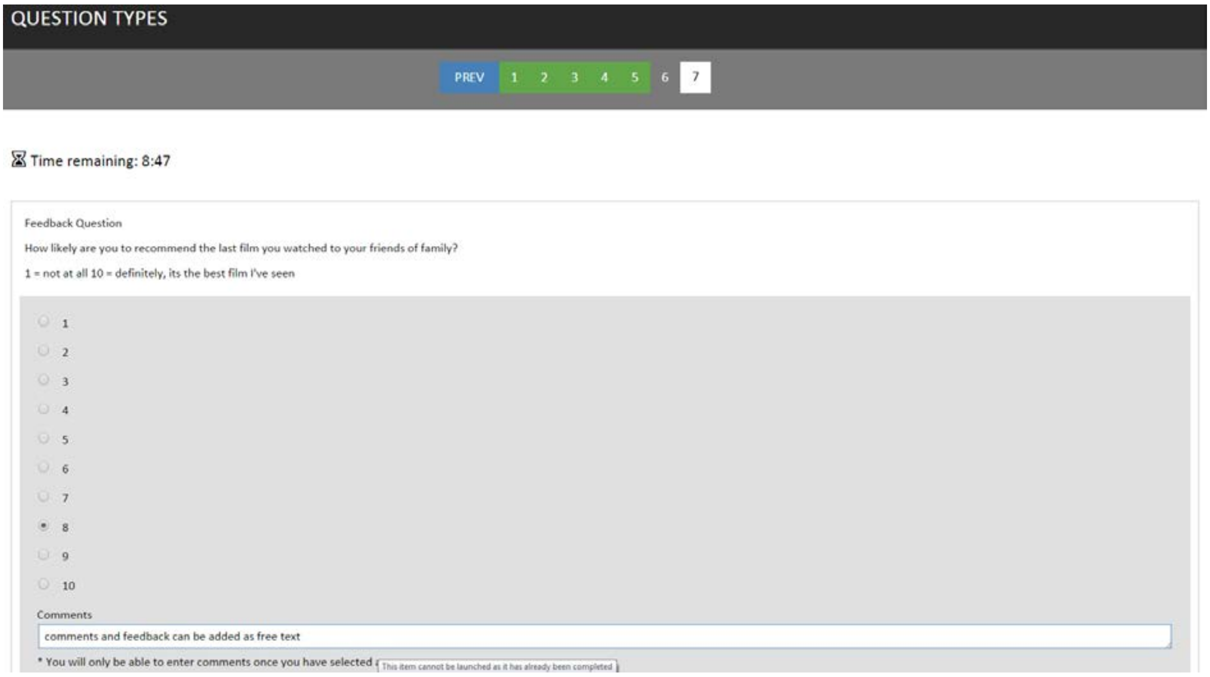


Figure 19: Feedback question

Feedback questions are not designed to assess your knowledge but to gather feedback in the form of a rating. The most common feedback question that you are likely to have seen is 'Out of 10, where 1 is not very likely and 10 is exttemely likely, how likely are you to recommend out services to a friend?'

In a work environment you may see questions along the lines of:

- How would you rate this Assessment / the Training course content.
- How would you rate your performance this month?
- Do you feel that you are fully supported by the management team to carry out your role?

Feedback questions can have any scale and in some cases the scale might be replaced with phrases rather than numbers.

Media within questions.

As mentions previously questions can have URLs, Images and Videos attached. The below demonstrates how each of these are displayed within the Assesment question.

The URL / web address and description are displayed above the question text. Clicking on the link will launch the web page so that you can read the information before answering the question.

Videos / Images will display next to the question text. Video clips can be viewed as displayed or full screen and you can play / pause / rewind / fast forward the clip as required.

Images can be views as displayed or made full size by clicking on the image.

Images and videos can also be attached to the answers and have the same controls as those attached to the question.

Figure 20: Question media

Additional Info

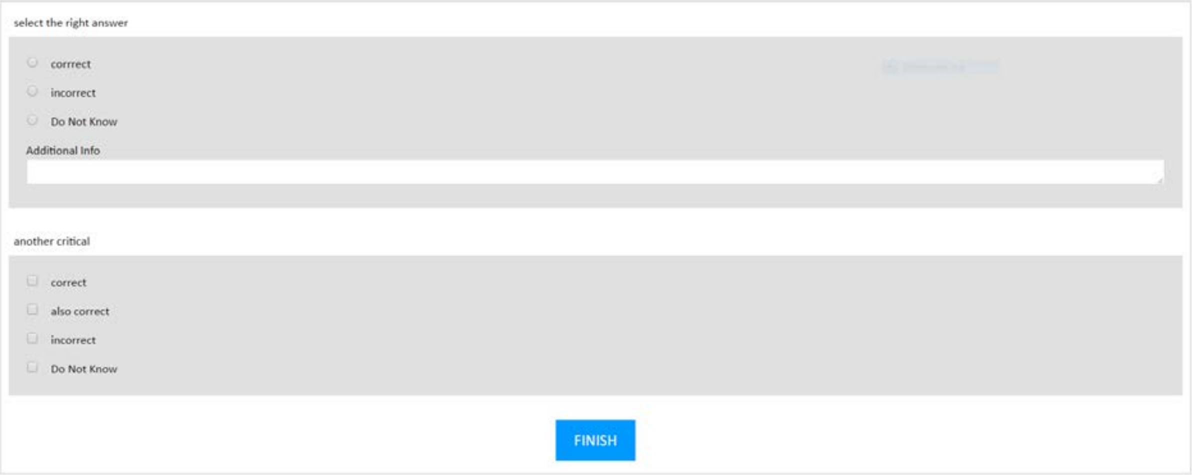


Figure 20: Additional Information

If a question asks for additional info a text box will appear for you to enter any reasoning for your answer or for any information regarding the answer or question that you may have.

3.2 Feedback Assessments

If a feedback assessment has been assigned to you to complete for one of your team members, this will appear in the list of assessments. You can view just these assessments via the filters.

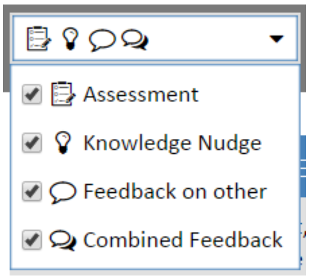


Figure 21: Feedback on other users

Click on the individuals name to select the assessment to complete.

Work through the assessment selecting the relevant answer.

You can also have the option of completing **combined feedback assessments**. These assessments allow you to see the employee's results, your own feedback results and then enter the agreed combined results.

4 Viewing Results

To view Assessment results from the menu select **User Results Reports** from the **Reporting** section. Based on your position within the hierarchy you can run the **User Results Report** for a whole site, department, team or individual.

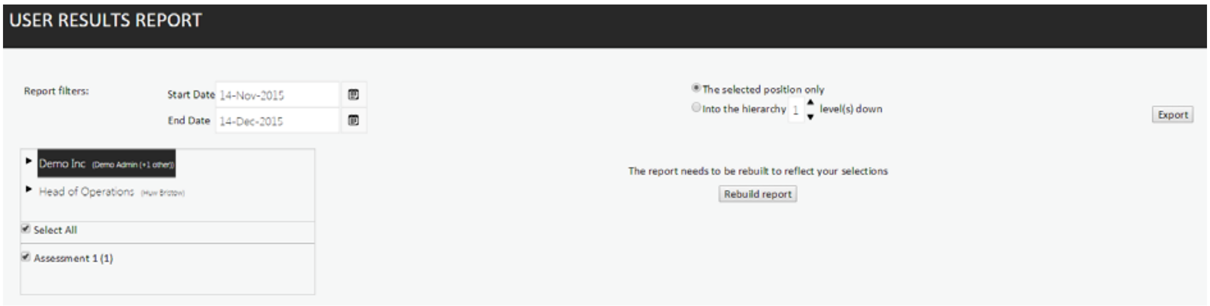


Figure 22: Viewing assessment reports by individual or team

- 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.

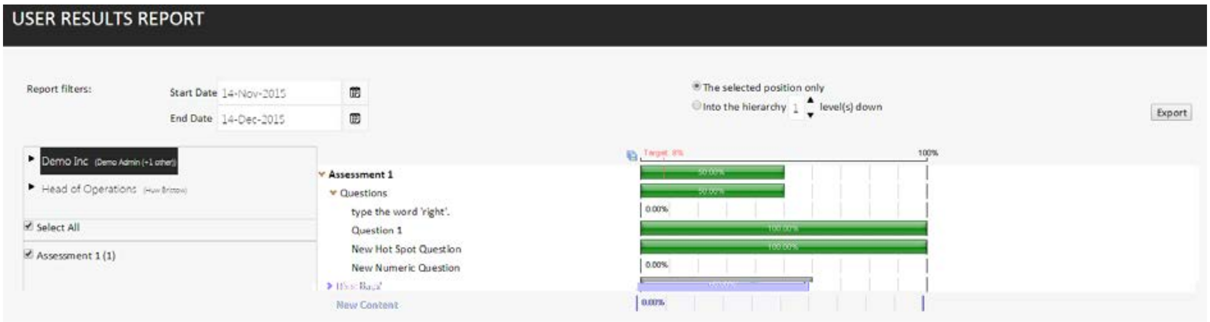


Figure 23: Detailed assessment results

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

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

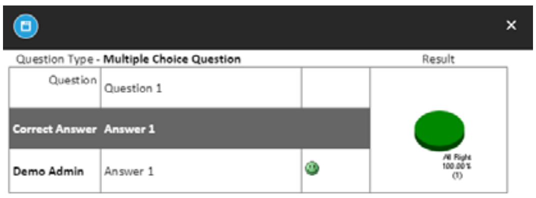


Figure 24: Viewing question detail and provided answers

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

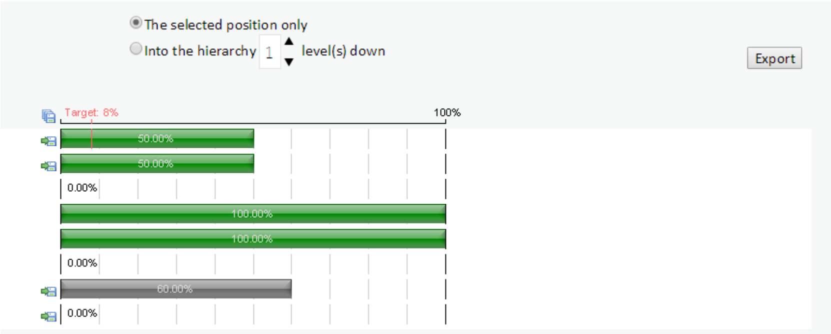


Figure 25: Exporting assessment details

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.

5 Viewing Feedback Results

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**.

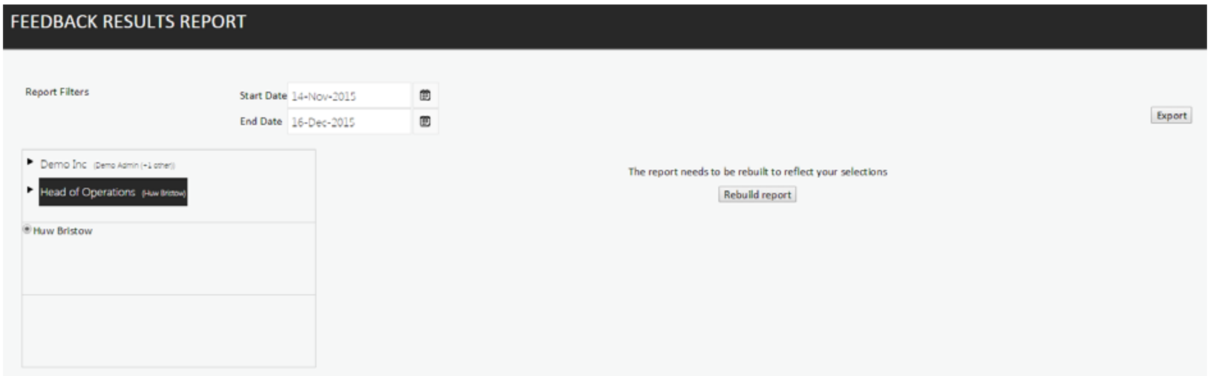


Figure 26: Rebuilding feedback reports

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.

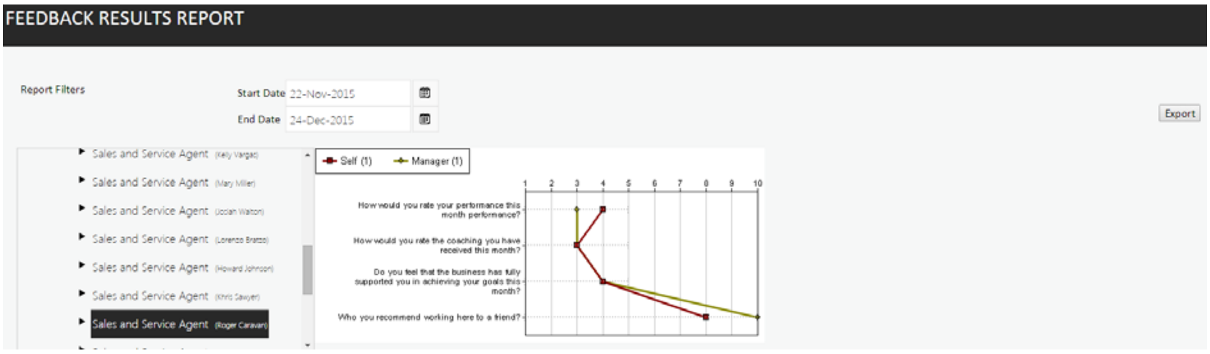


Figure 27 Feedback Results

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.

6 Managing and Viewing Crystal Reports

Skills Assessor 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).

6.1 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.

6.2 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:

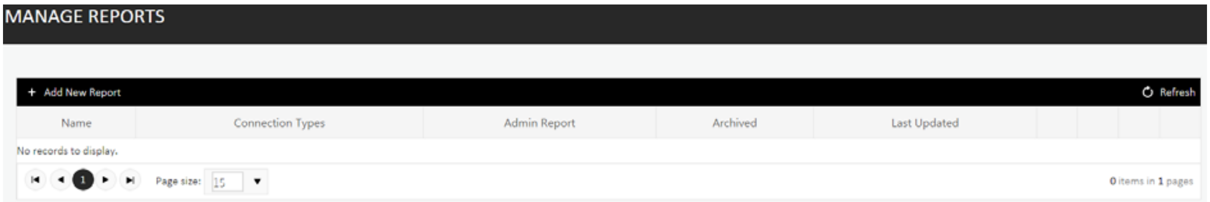


Figure 28: Manage Reports Page

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 Skills Assessor, Training Manager 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 Skills Assessor. This will result in the report file being retained by the server; however, it will not be accessible via Skills Assessor. These files will be prefixed with ‘TEMPFILE’ and may be manually deleted from the server’s Crystal Reports upload folder by administrators.

To edit report settings, select a report from the table in the Manage Reports page and click 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.

6.3 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.

7 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.

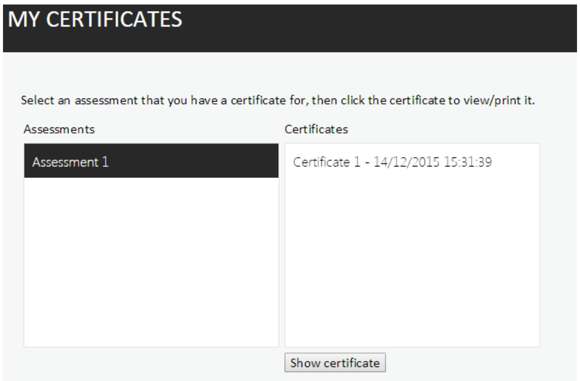


Figure 29: Viewing certificates

8 DNA

DNA is where key business data, for example, quality monitoring, sales and revenue, customer satisfaction etc., has been used in creating a job role profile and the data is weighted in order of importance to the business.

This allows visibility of where there is a potential training requirement or where performance has exceeded expectation.

There may also be the opportunity for self-learning by assigning learning items to enhance performance based on the results achieved. As a manager you will have visibility of these performance results for your team and be able to assign learning items if required to individual team members.

8.1 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.

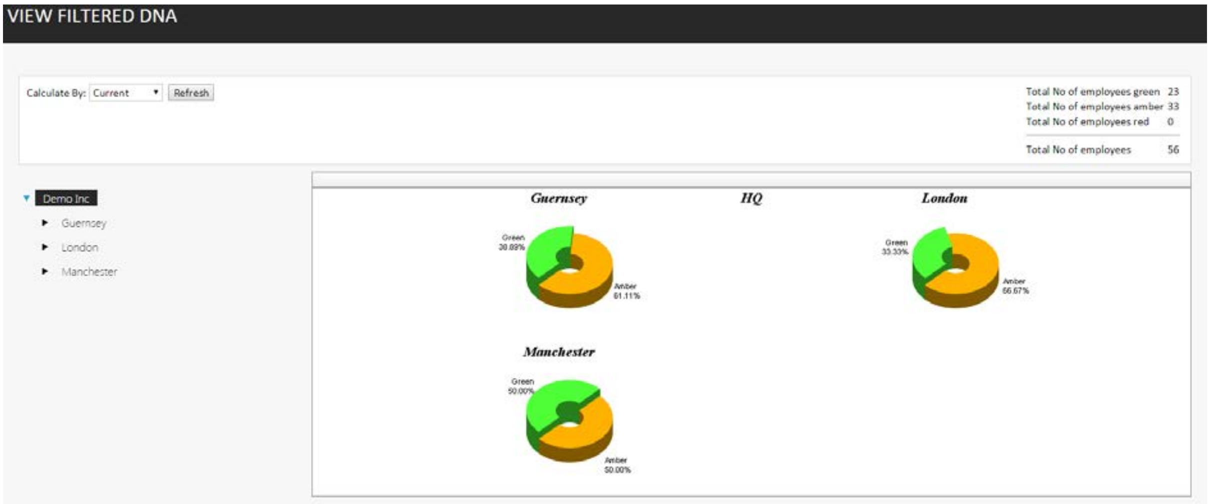


Figure 30: View Filtered DNA page

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.

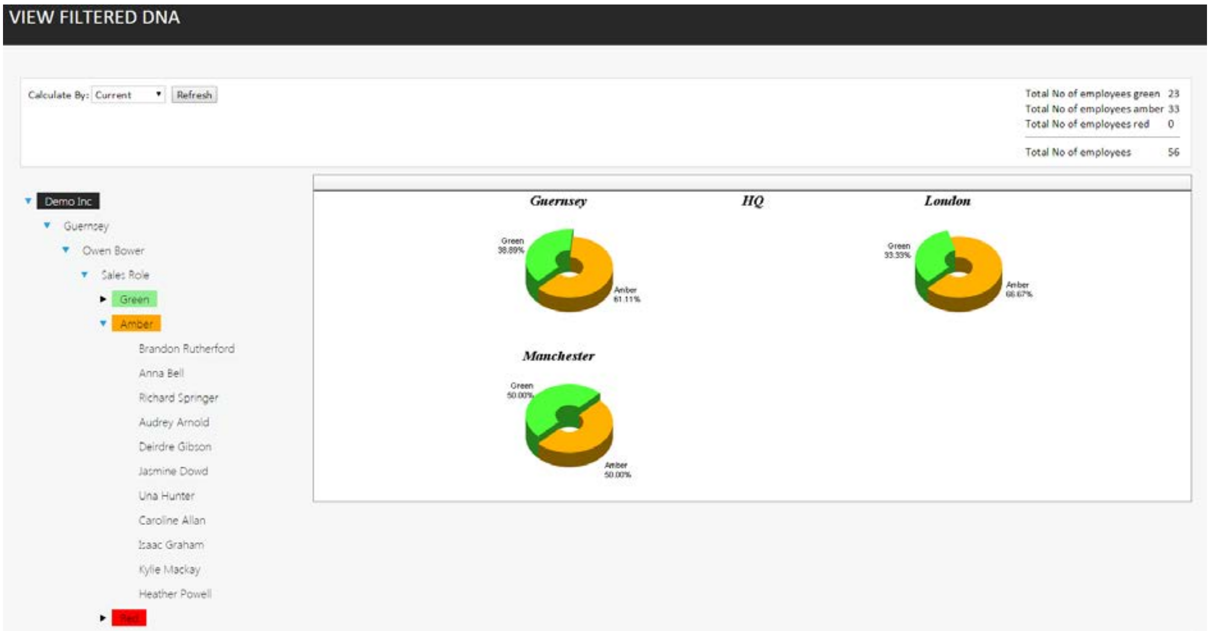


Figure 31: Viewing detailed information in the View Filtered DNA page

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

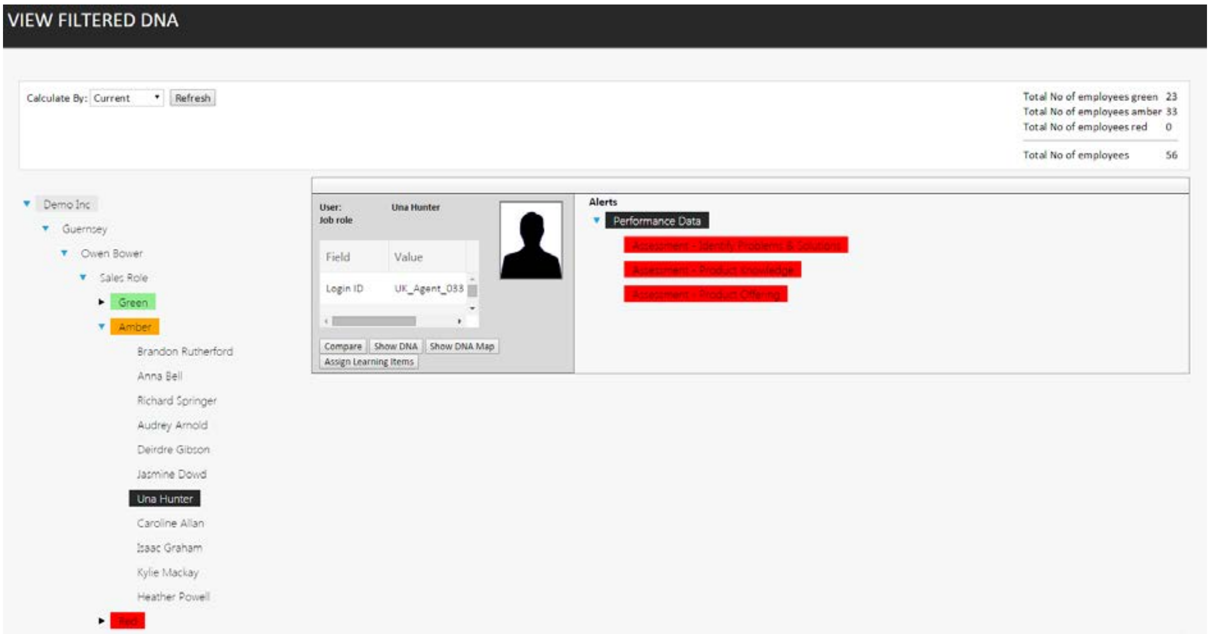


Figure 32: Viewing individual DNA results

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

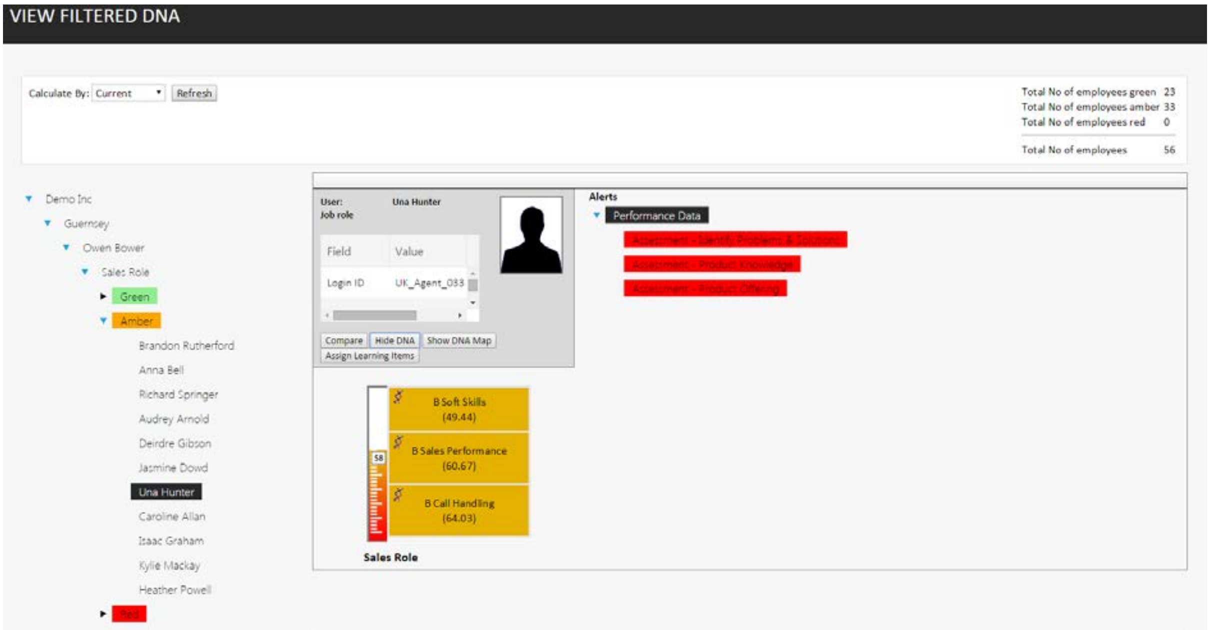


Figure 33: Viewing individual DNA results

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

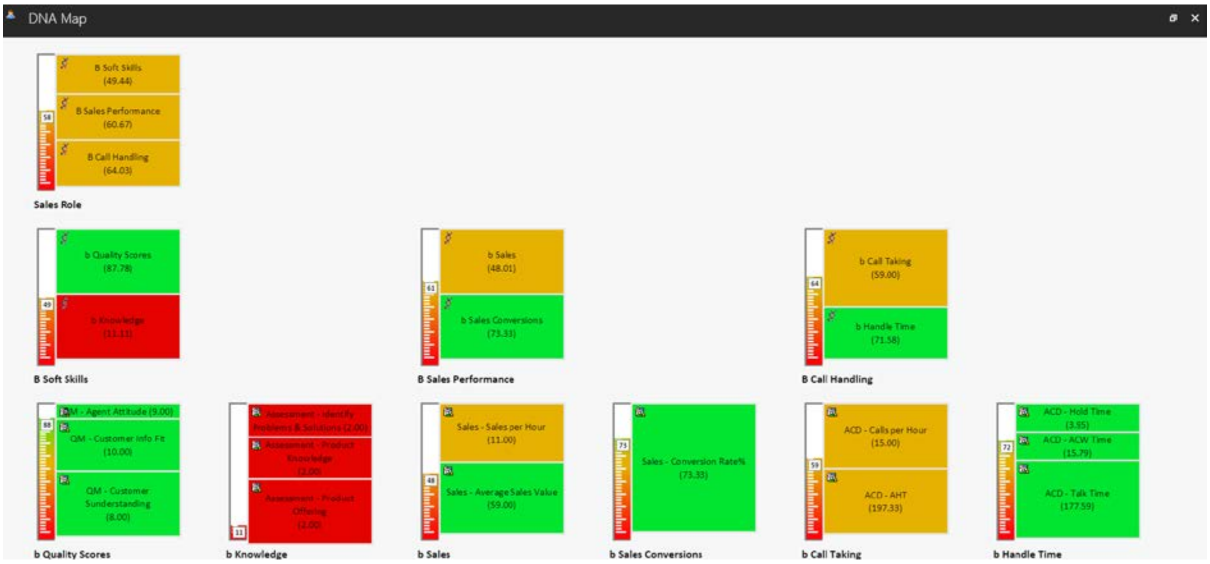


Figure 34: Viewing the DNA map

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

Figure 35: 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**.

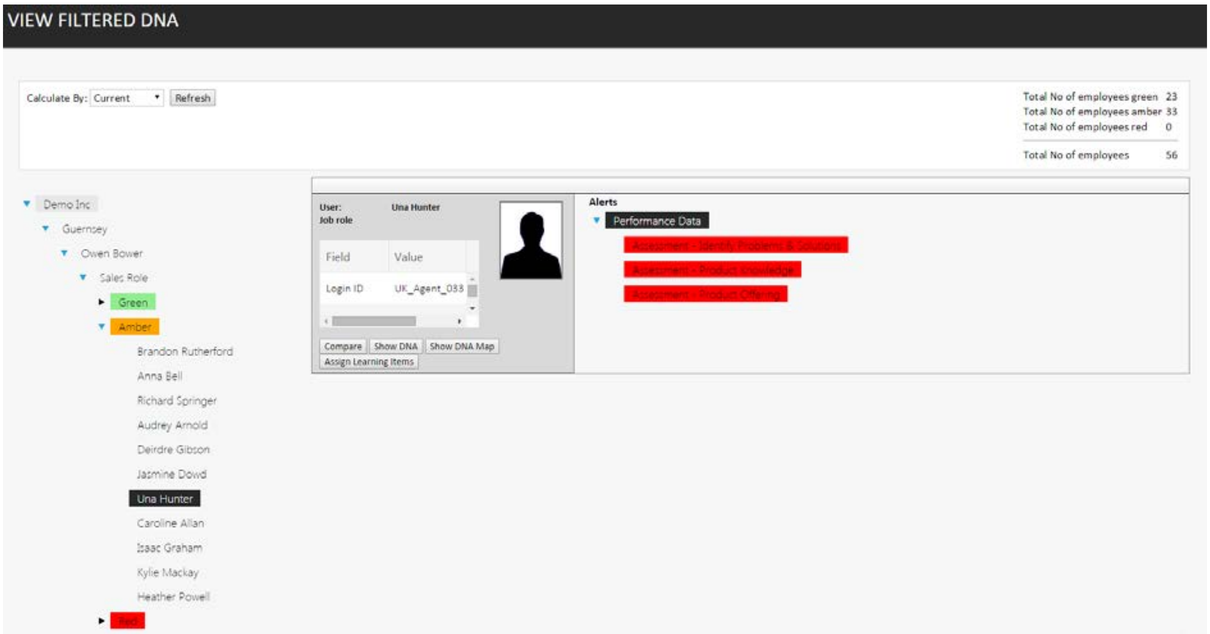


Figure 36: Assigning Learning Items

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.

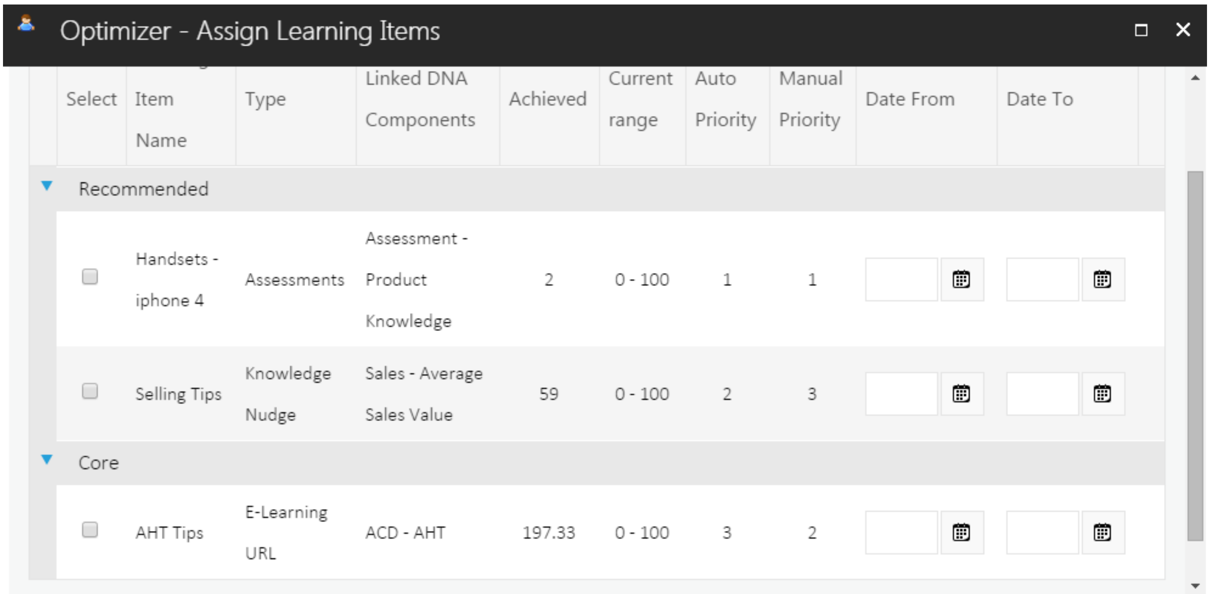


Figure 37: Assigning Learning Items

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

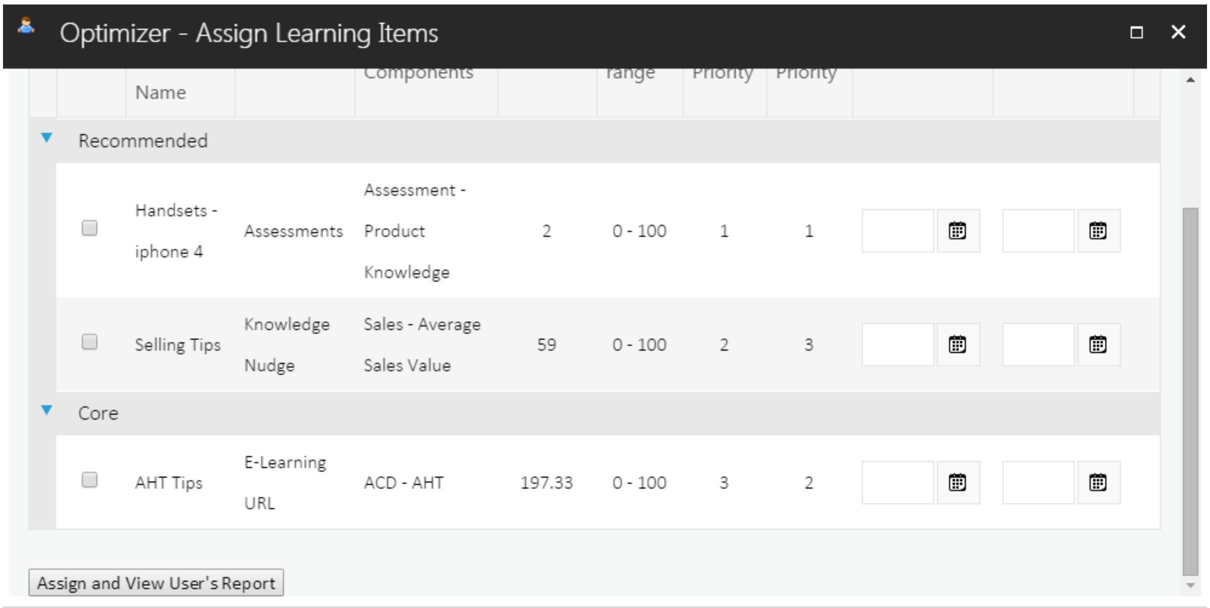


Figure 38: Assigning Learning Items

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.

9 Changing Your Password

To change your account password select the **Change Password** link from the navigation menu. Enter your existing password and new password into the form, then click **Save** to confirm the change.

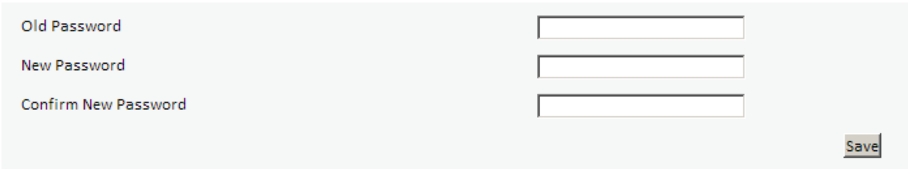


Figure 39: Changing your passwordTagging

The tagging feature allows the user to be able to assign a tag reference to an assessment, assessment content, knowledge nudges as well as to individual questions.

10 Adding a new Tag within manage assessments

To add a tag to an assessment, assessment content or a Question, click the edit button within the assessment manager. This will enable the option to add a new tag to the assessment as show below.

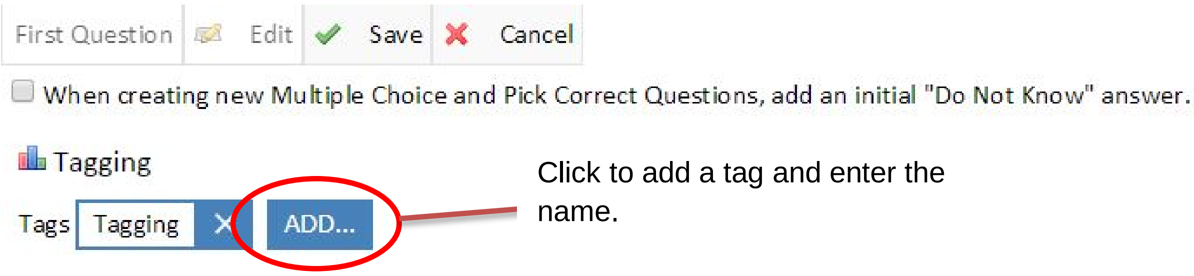


Figure 40: Adding a Tag

After the save button has been pressed, the new tags will be added and the editor will exit the edit mode.

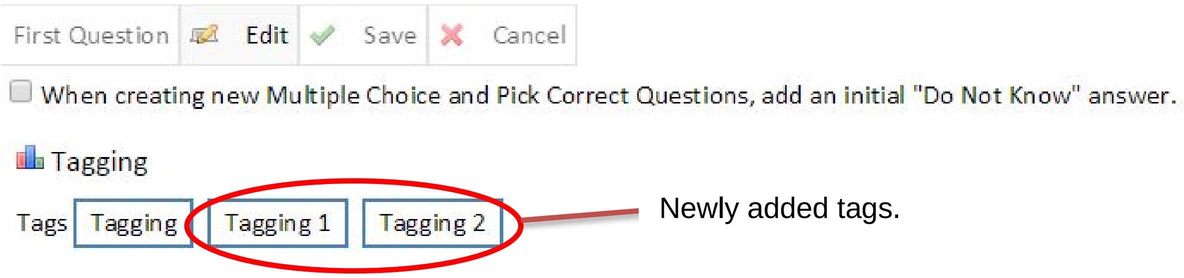


Figure 41: Newly added tags

Deleting a Tag

Deleting a tag simply requires the user to press the ‘X’ (as show below) whilst in the edit mode. Once this is done and the user has clicked save, the tag will be removed.

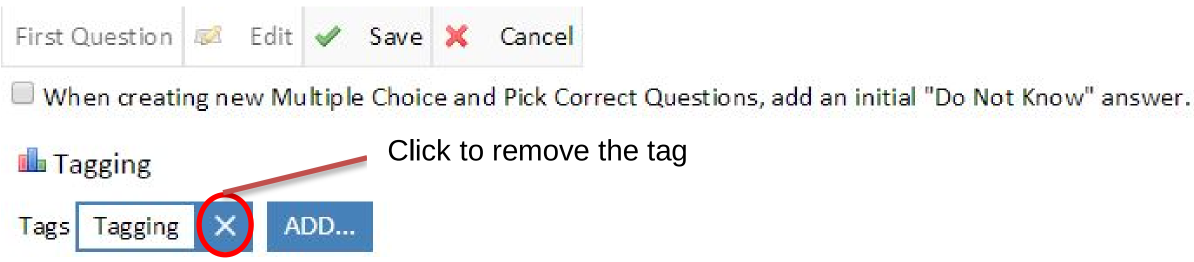


Figure 42: Removing a Tag

11 Personal Development Reviews

The new PDR feature allows agents to specify their personal development objectives and have these objectives reviewed and approved by their manager.

The feature is divided into two new widgets: PDR and PDR Dashboard. The PDR page is primarily for agents to define their development objectives, whilst the dashboard allows managers to edit, approve and check the status of their reports' PDRs.

11.1 PDR Dashboard Widget

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.

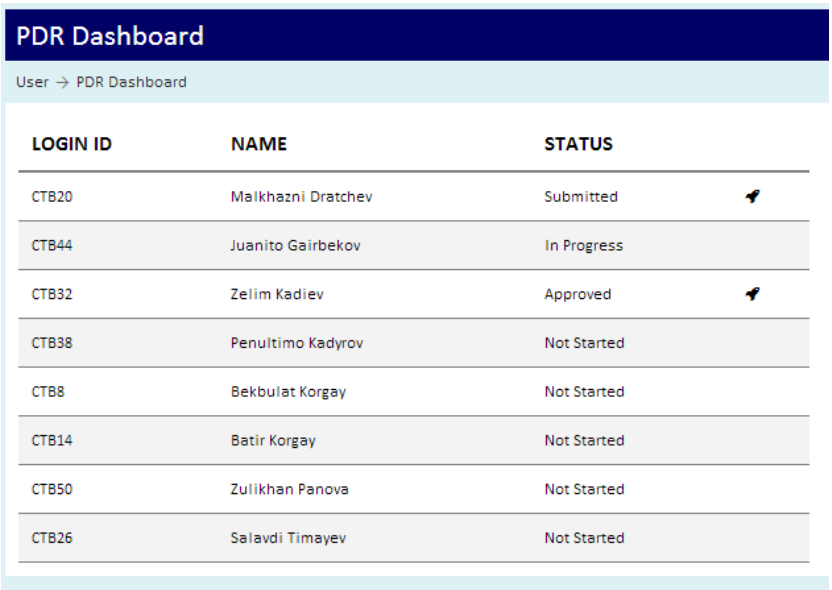


Figure 43: PDR Dashboard

Selecting the **PDR Dashboard** widget from the navigation menu will display the logged-in manager's list of direct reports, including their Login ID, name and PDR status. The status column will contain either: **Not started**, **In Progress**, **Submitted for Approval** (available for review and approval by the manager) or **Approved** (for PDRs that have been approved by the manager). Reports' PDRs will become available for viewing and editing by the manager once they've been submitted. Once a PDR has been approved it will become available to both the agent and manager in read-only mode.

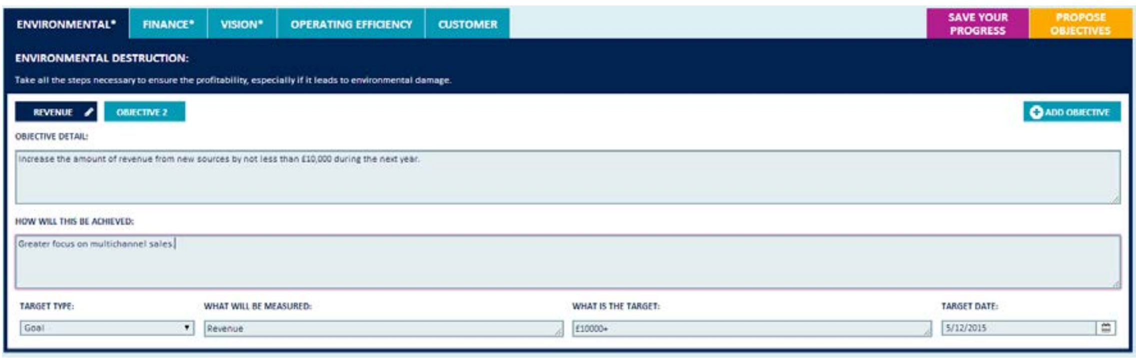


Figure 44: Reviewing objectives

11.2 Feature notes

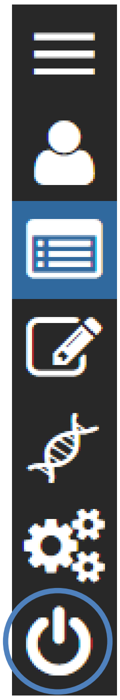
11.2.1 PDR Dashboard Widget

Managers will only be able to see the PDRs of users who are directly below them in the hierarchy.

12 Logging Out

To logout ensure that you have no open assessments and click the click **Logout** link as shown below.

Collapsed Menu



Expanded Menu

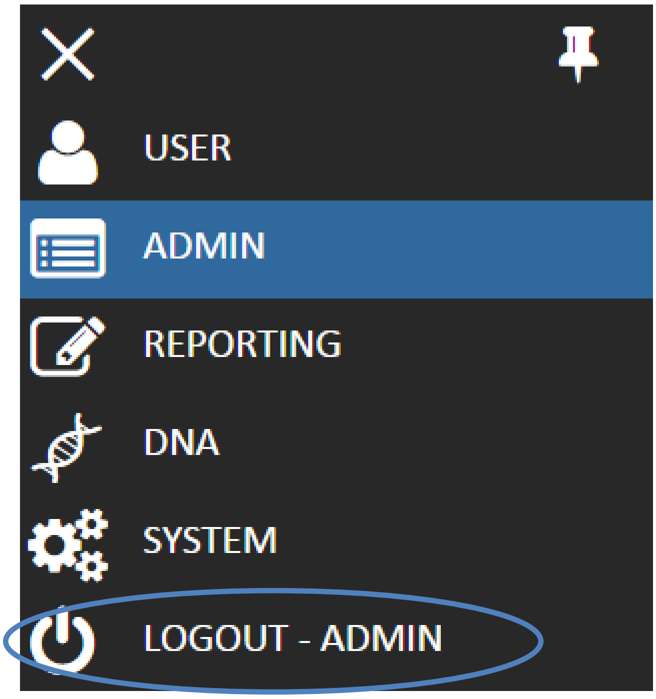


Figure 45: Logout