Skills Assessor 8.5.648

Agent User Guide

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1 Overview

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

2 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.

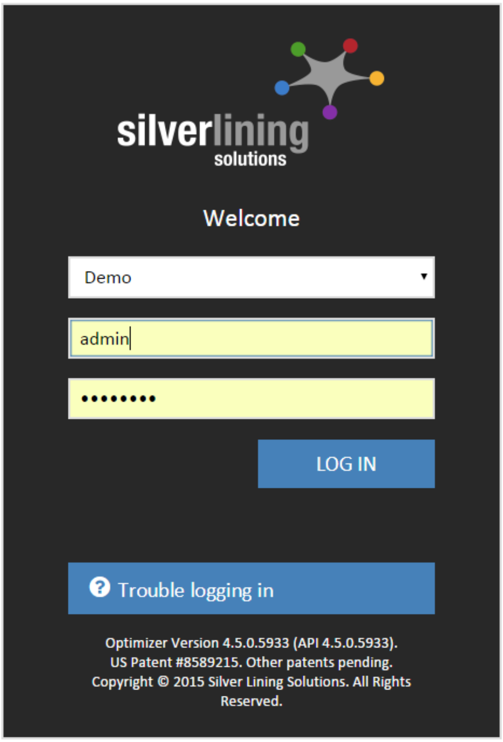


Figure 1: Log on screen

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 and learning items that have been assigned. This screen contains any assessments and learning items that have been assigned. Learning items may include useful website links, text, knowledge nudges or other assessments developed by trainers or managers.

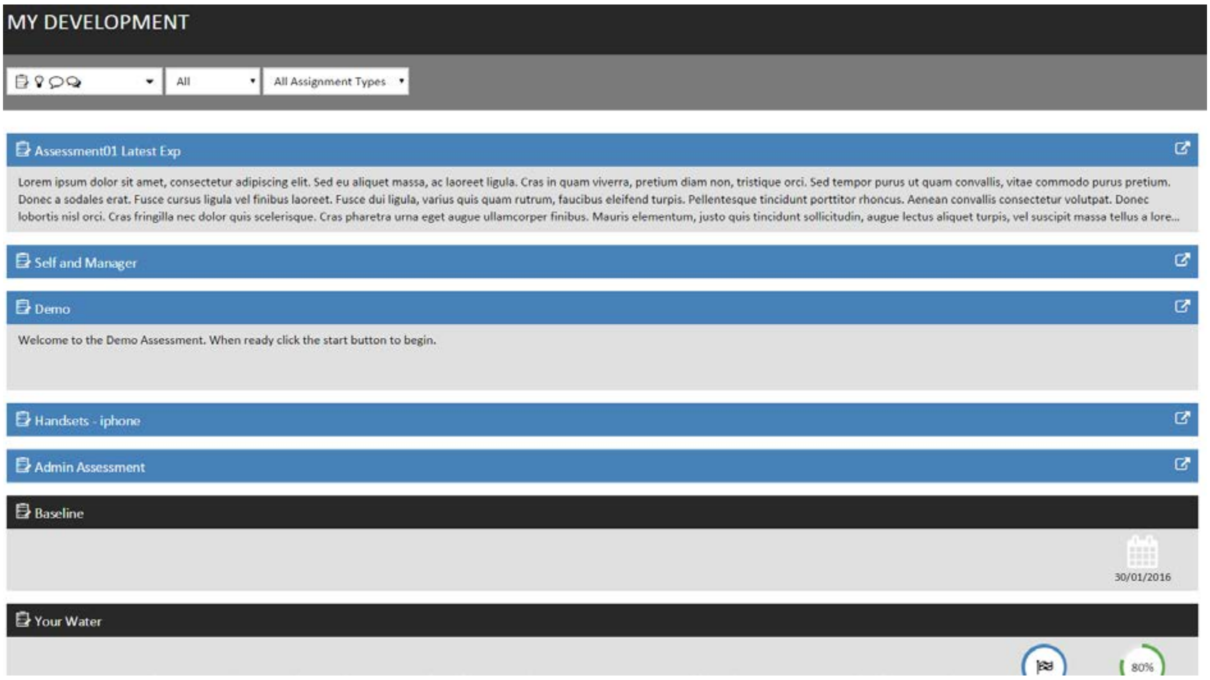


Figure 2: My Development Screen

If any of the assessments have been given a cview all stylesompletion date, the date will be listed in the “Date By” column.

3 Taking an Assessment

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

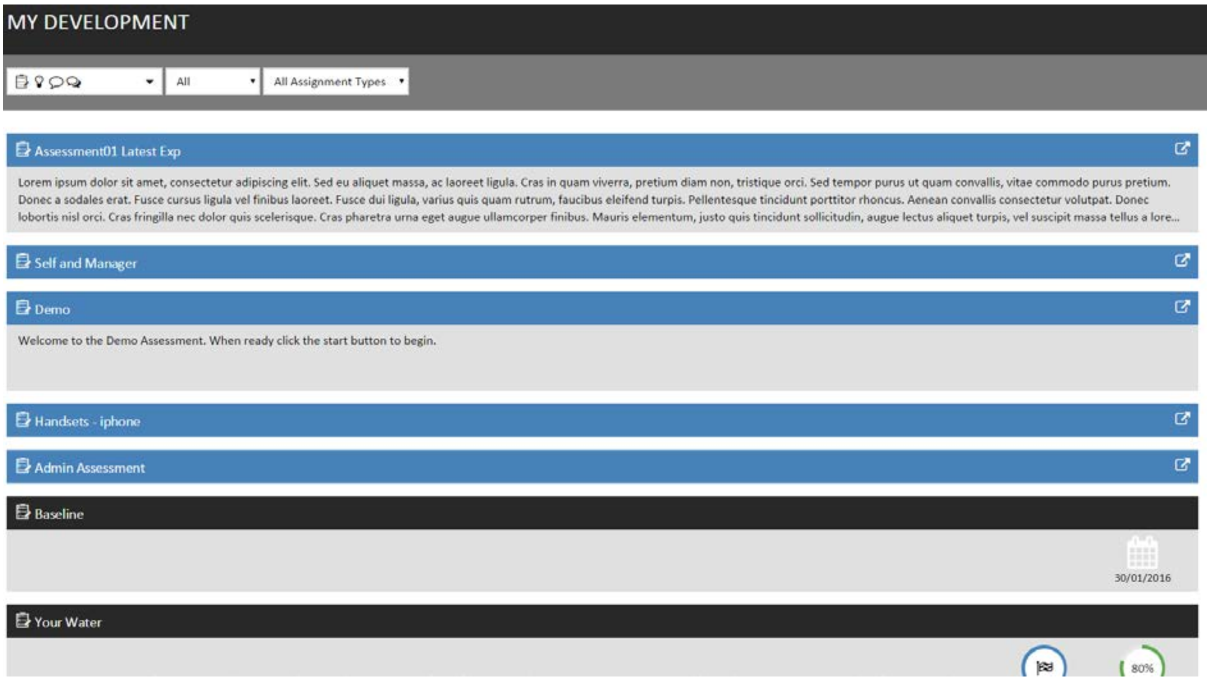
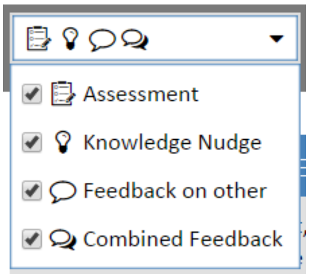


Figure 3: Assessments on the My Development Screen

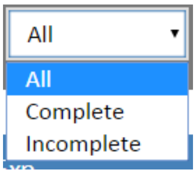
Active Assessments are presented at the top of the list. Under each Assessment a snippet of any introduction text is also displayed enbling the user to quickly see key information regarding the Assessment.

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

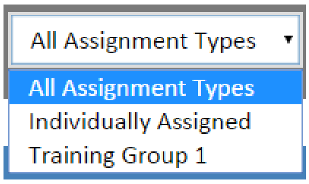
Assessment Style



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.

- Combinde 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.

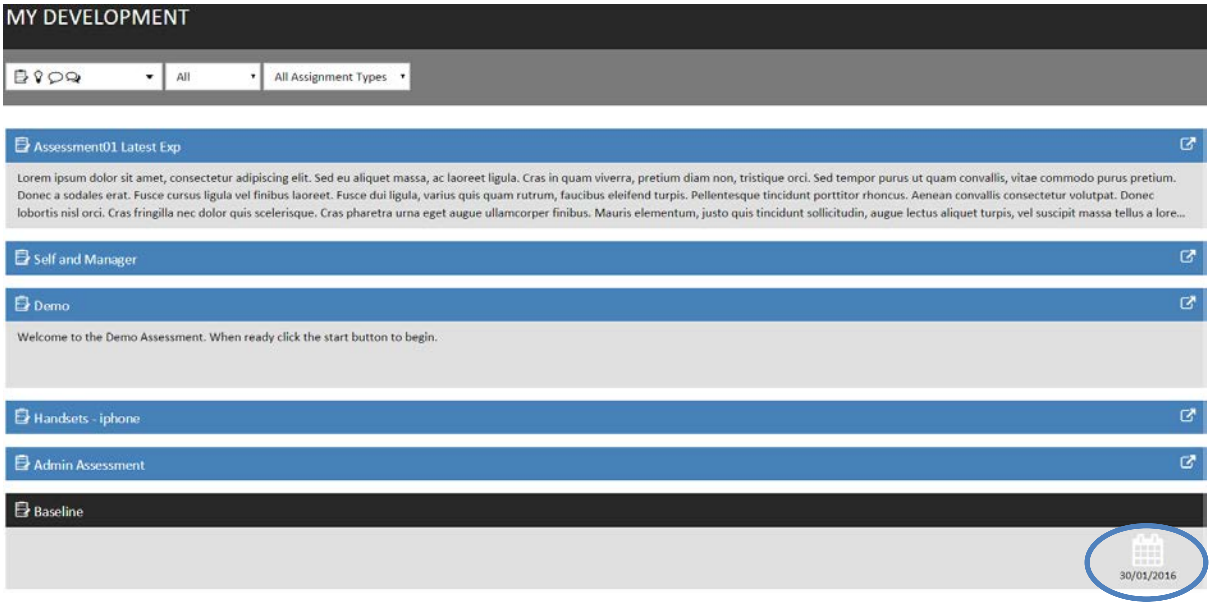


Figure 4: Assessment with dates

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 5: Assessment Completion

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

Figure 6: 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.

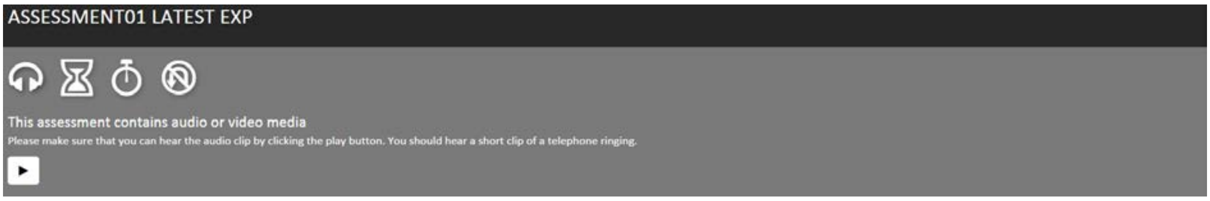


Figure 7: Media information

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

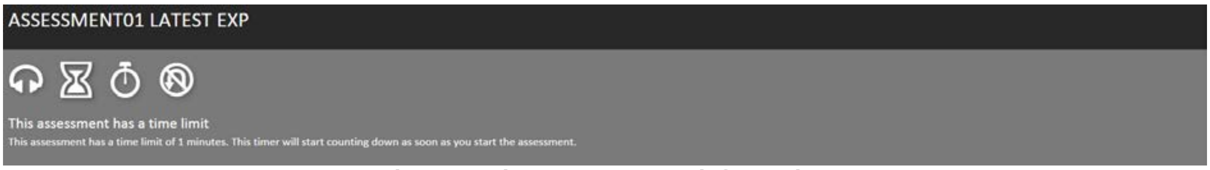


Figure 8: Time Assessment information

Figure 9: 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.

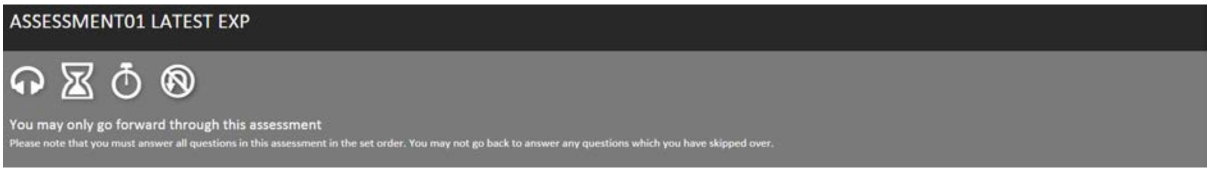


Figure 10: Forward only navigation.

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

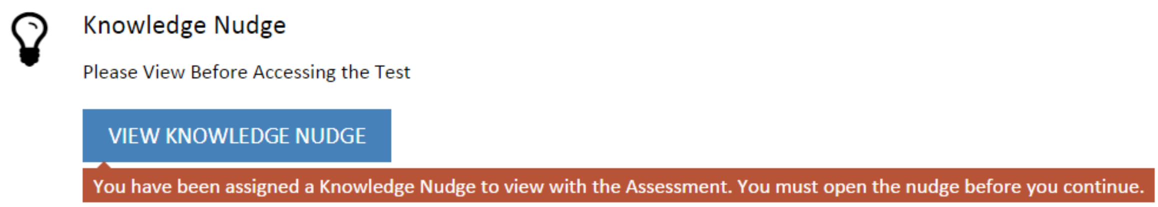


Figure 11: Knowledge Nudge Information.

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.

3.1 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 12: 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

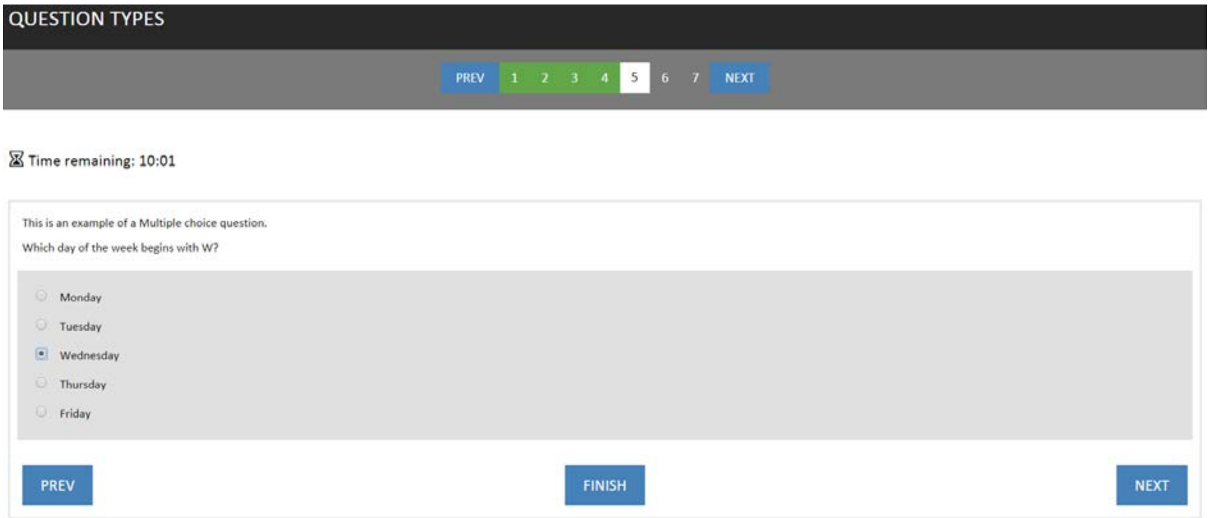


Figure 13: Multiple Choice question

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

Pick Correct

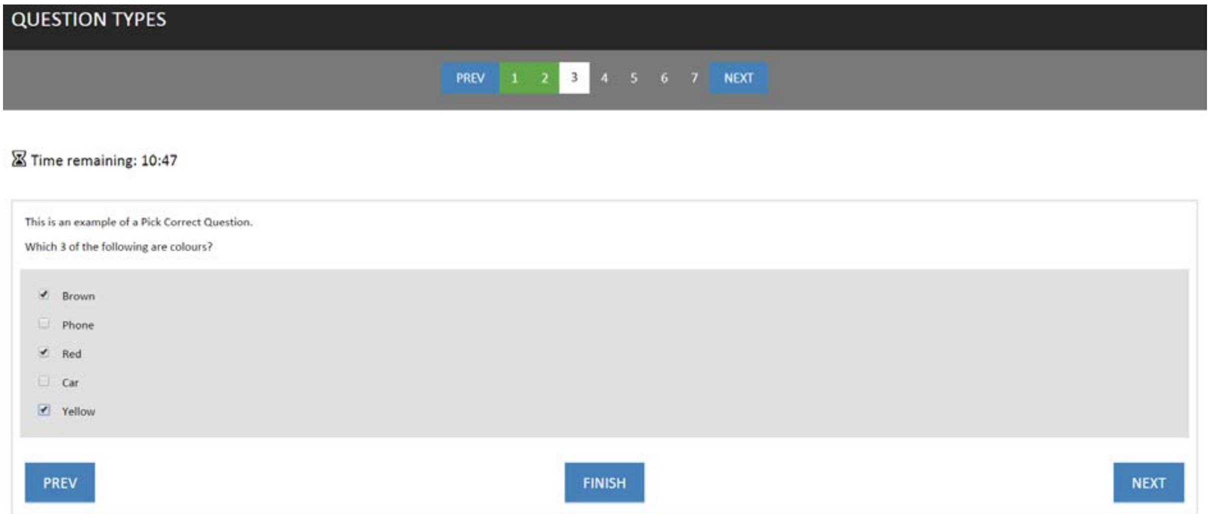


Figure 14: Pick Correct question

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

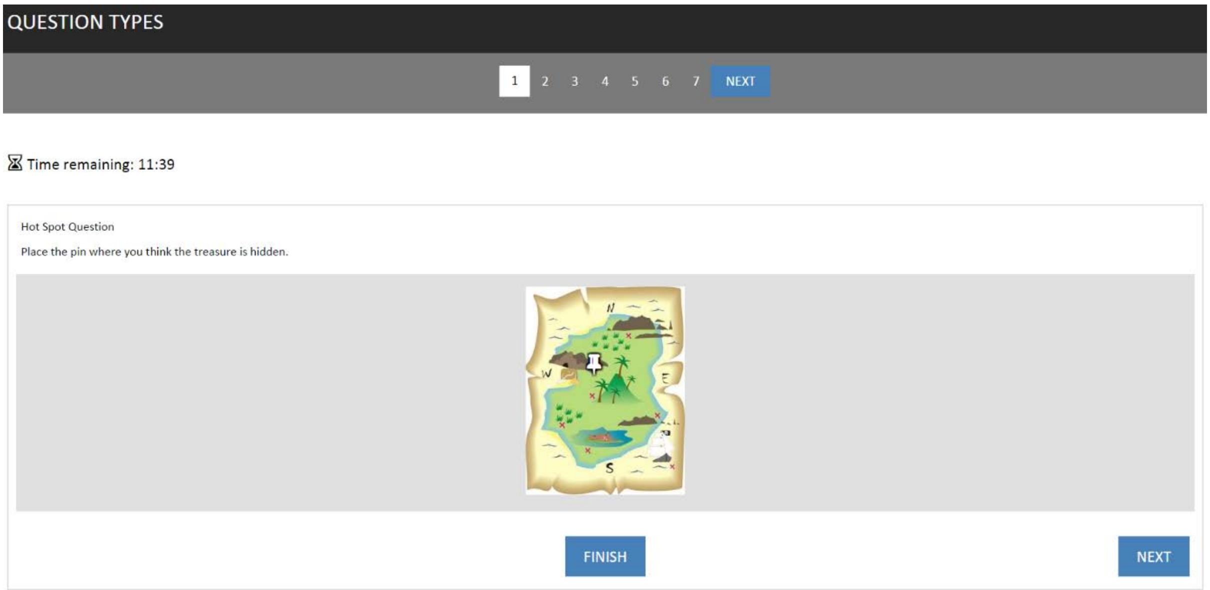


Figure 15: Pick Correct question

Hot Spot questions test you understanding by asking you to identify a specific item on 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

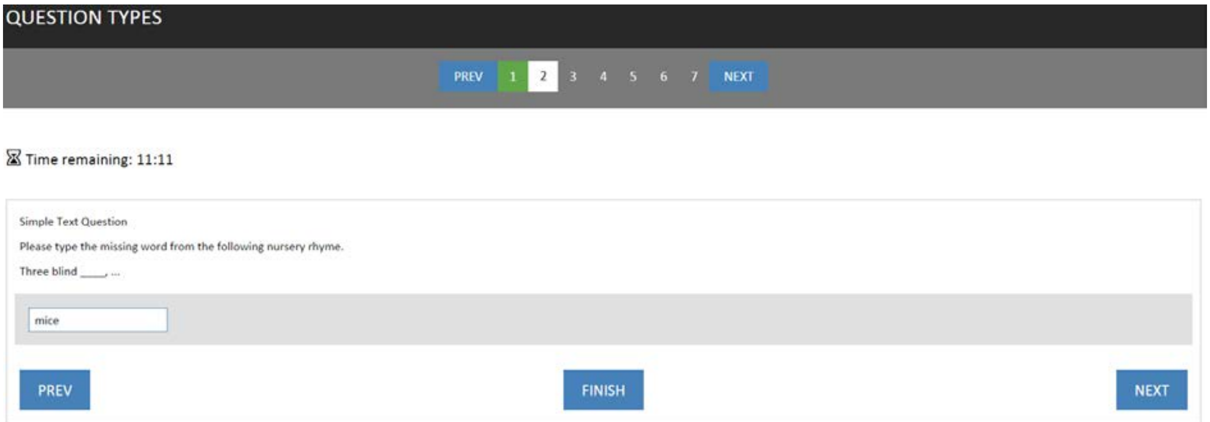


Figure 16: Text question

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

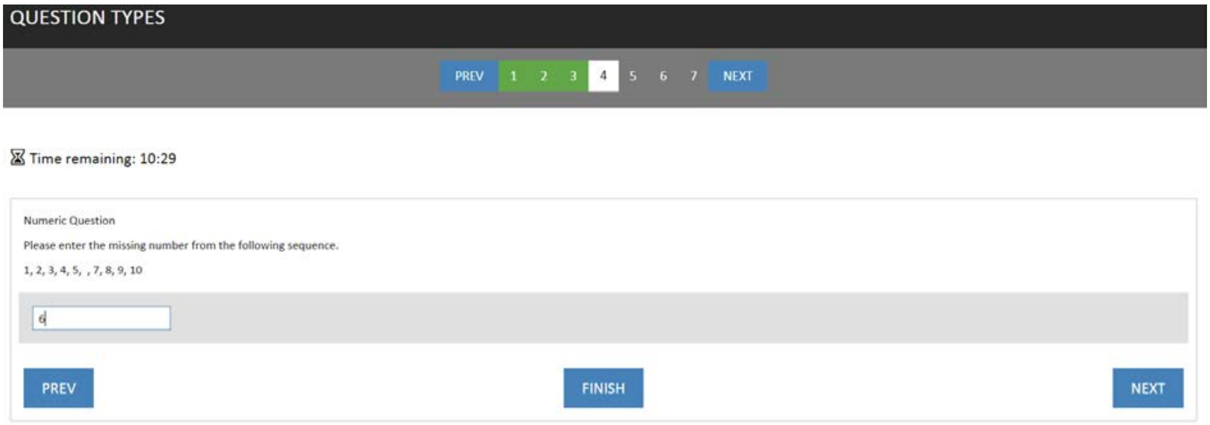


Figure 17: Numeric question

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

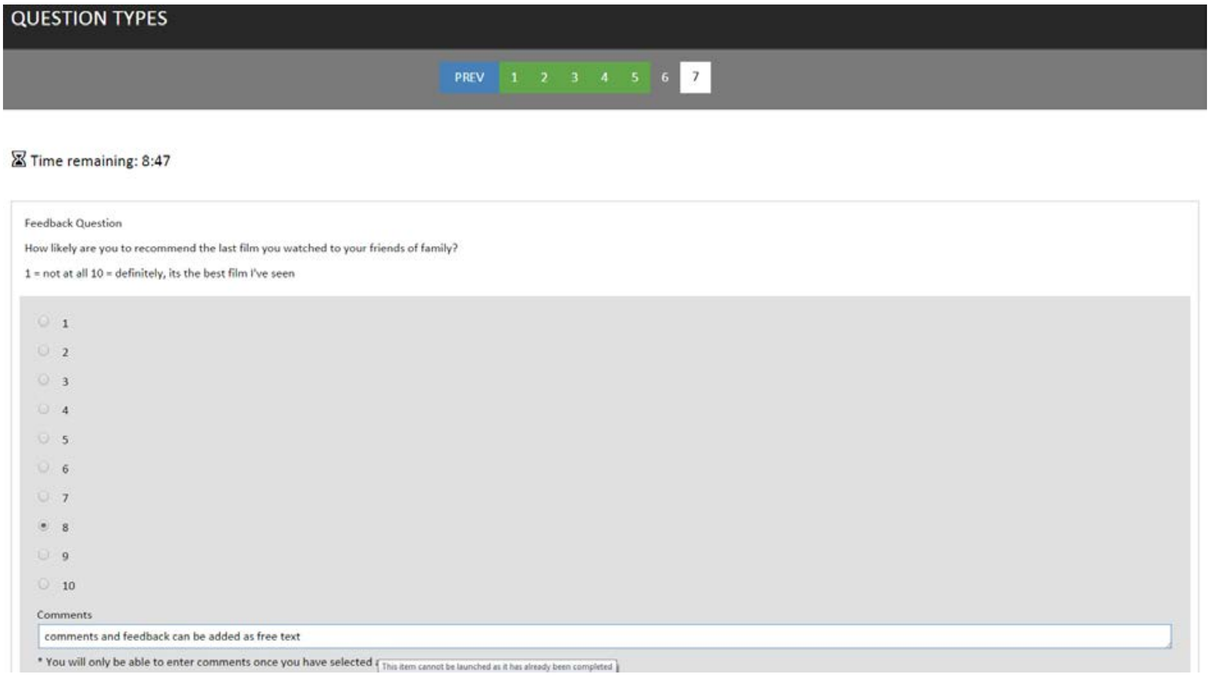


Figure 18: Feedback question

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 19: Question media

Additional Info

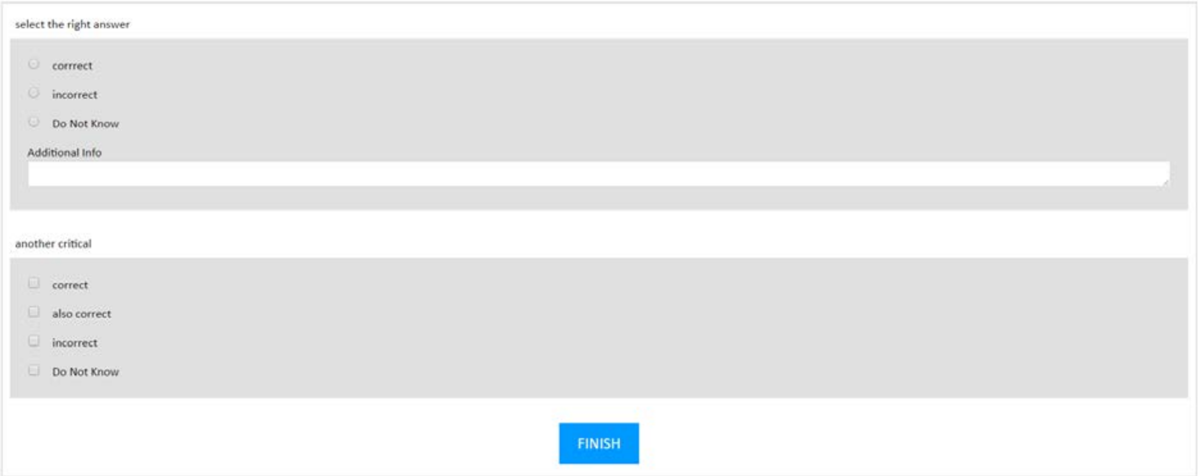


Figure 20: Additional Information

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.

4 Viewing Results

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.

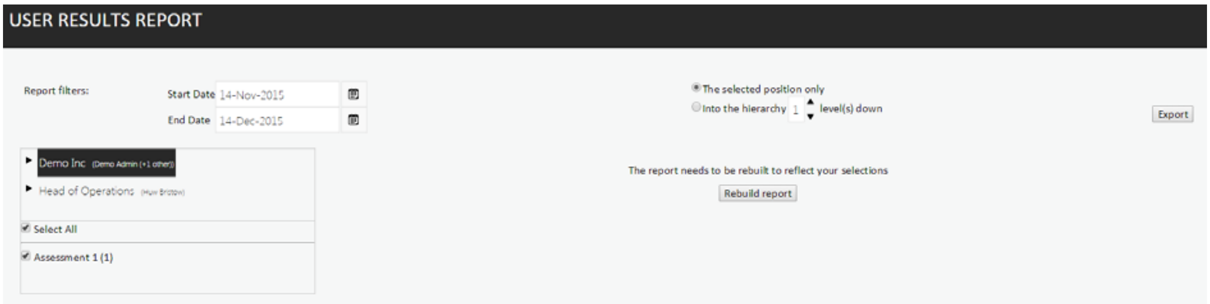


Figure 21: Viewing assessment reports by individual or team

- 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.

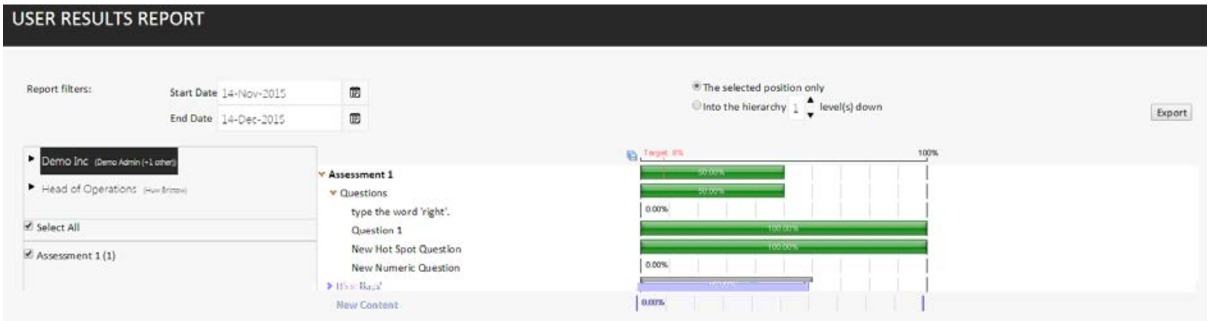


Figure 22: Detailed assessment results

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.

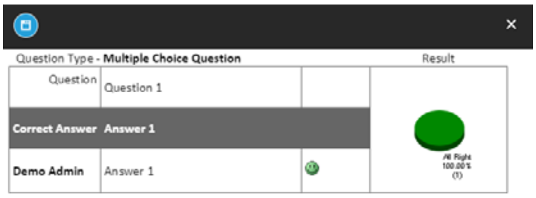


Figure 23: Viewing question detail and provided answers

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

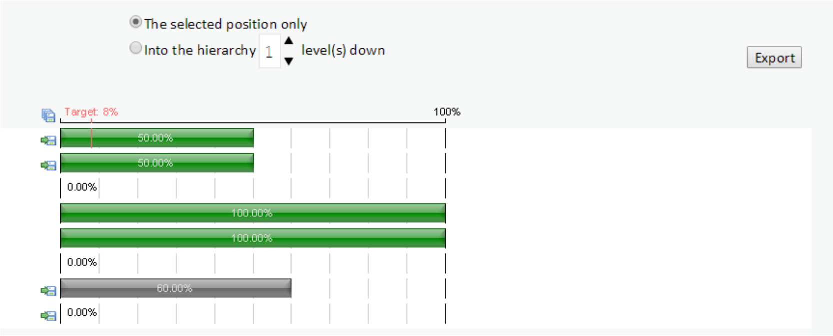


Figure 24: Exporting assessment details

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**.

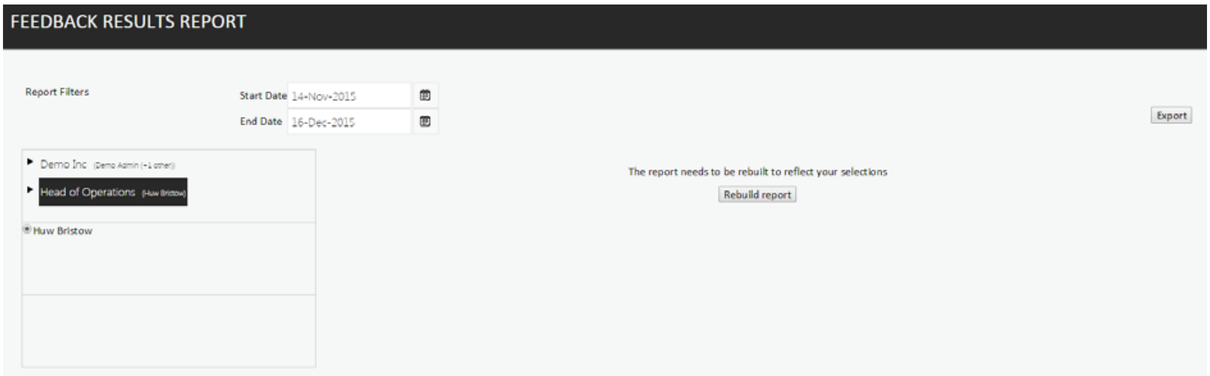


Figure 25: Rebuilding feedback reports

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.

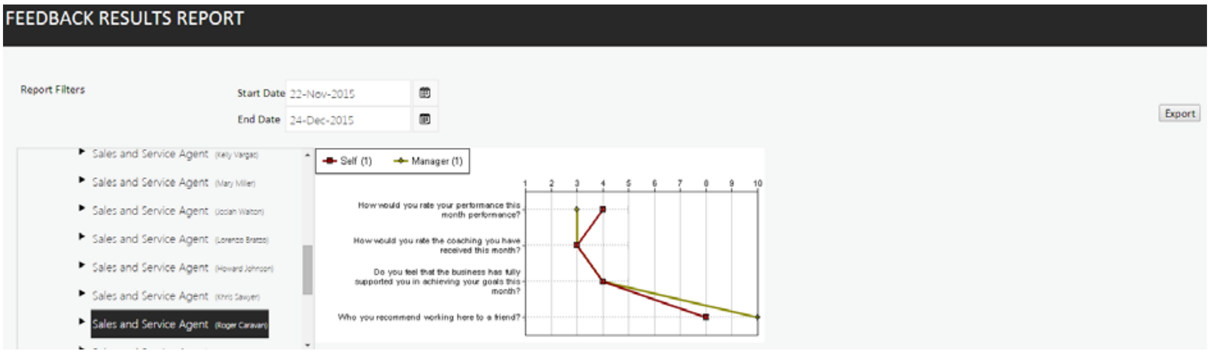


Figure 26: Feedback Results

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 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.

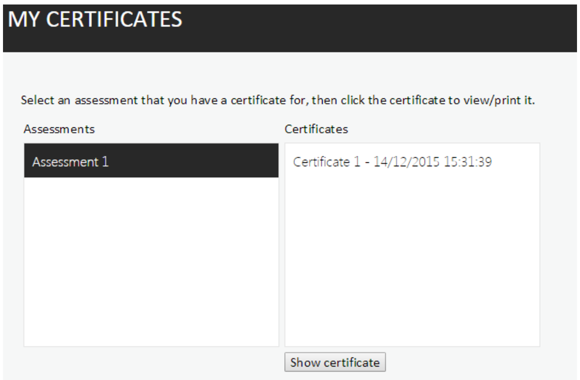


Figure 27: Viewing certificates

7 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.

7.1 Filtered DNA Report

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.

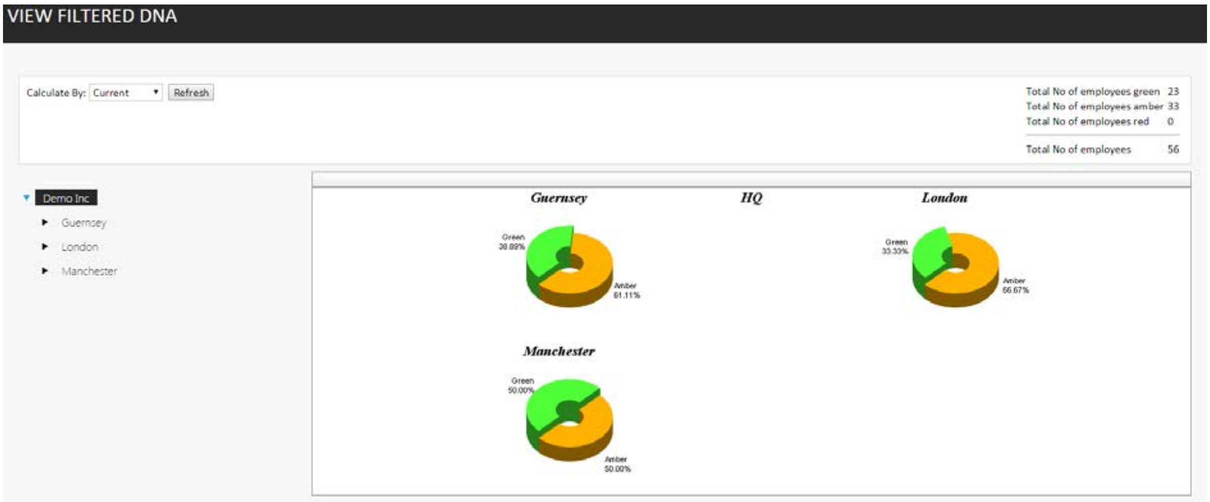


Figure 28: View Filtered DNA page

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.

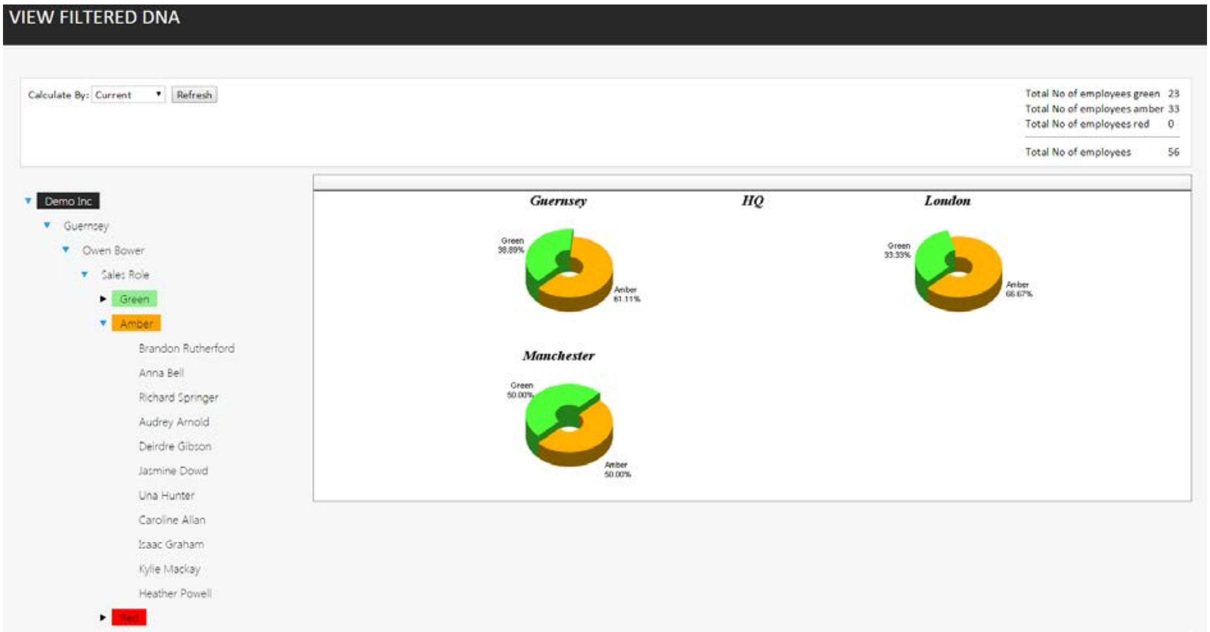


Figure 29: Viewing detailed information in the View Filtered DNA page

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

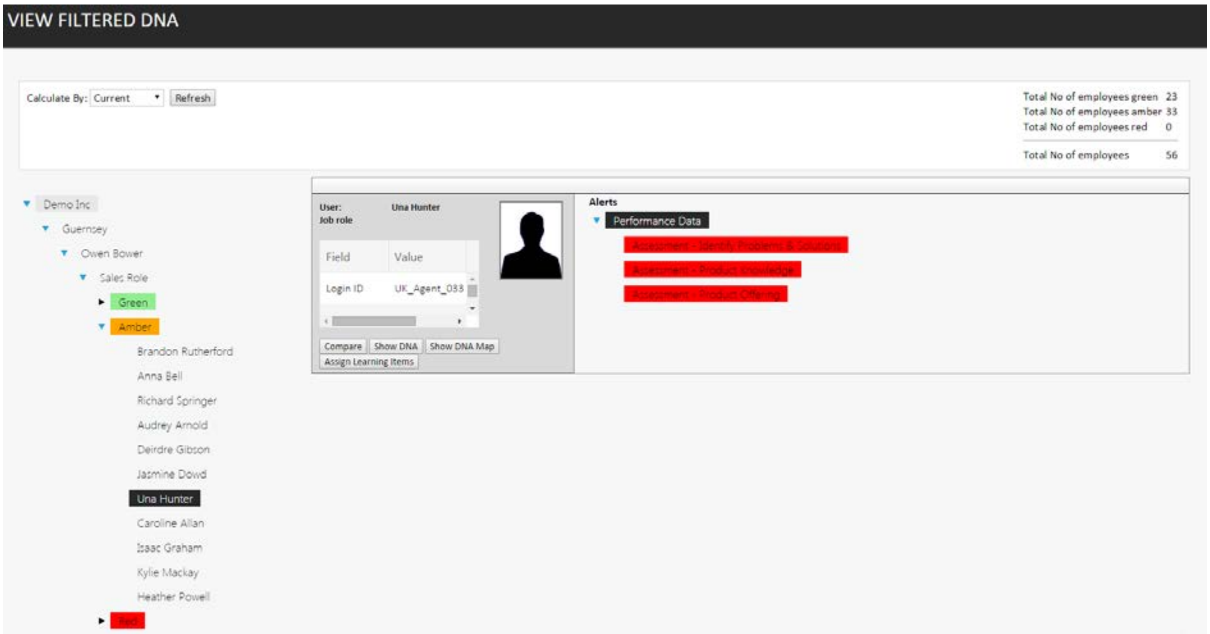


Figure 30: Viewing individual DNA results

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

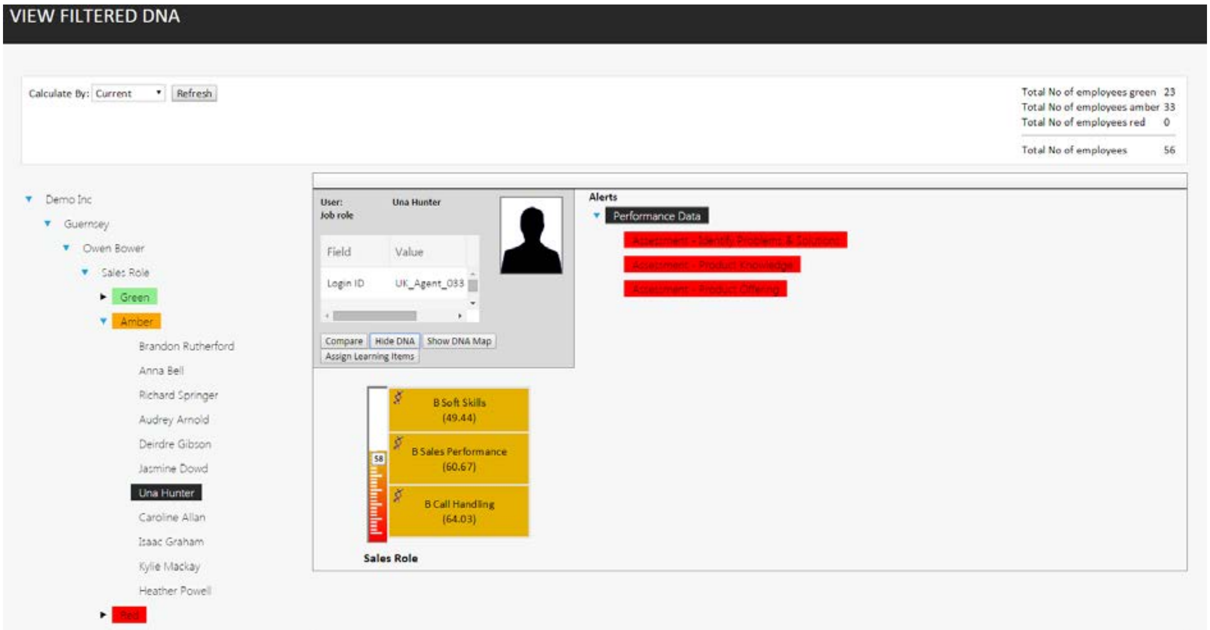


Figure 31: Viewing individual DNA results

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

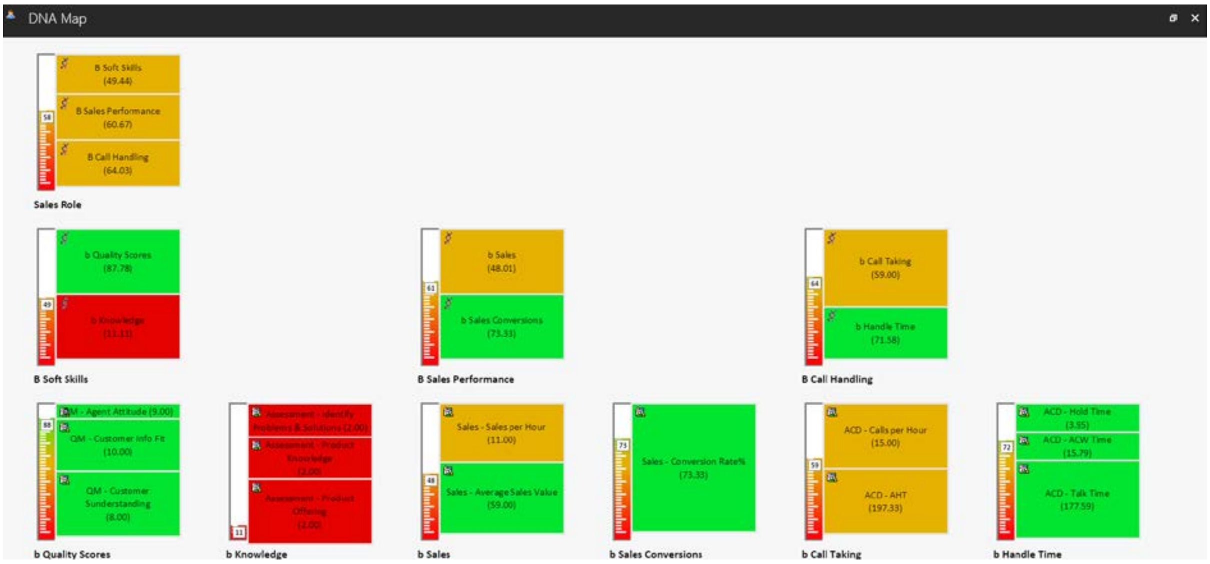


Figure 32: Viewing the DNA map

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

Figure 33: 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**.

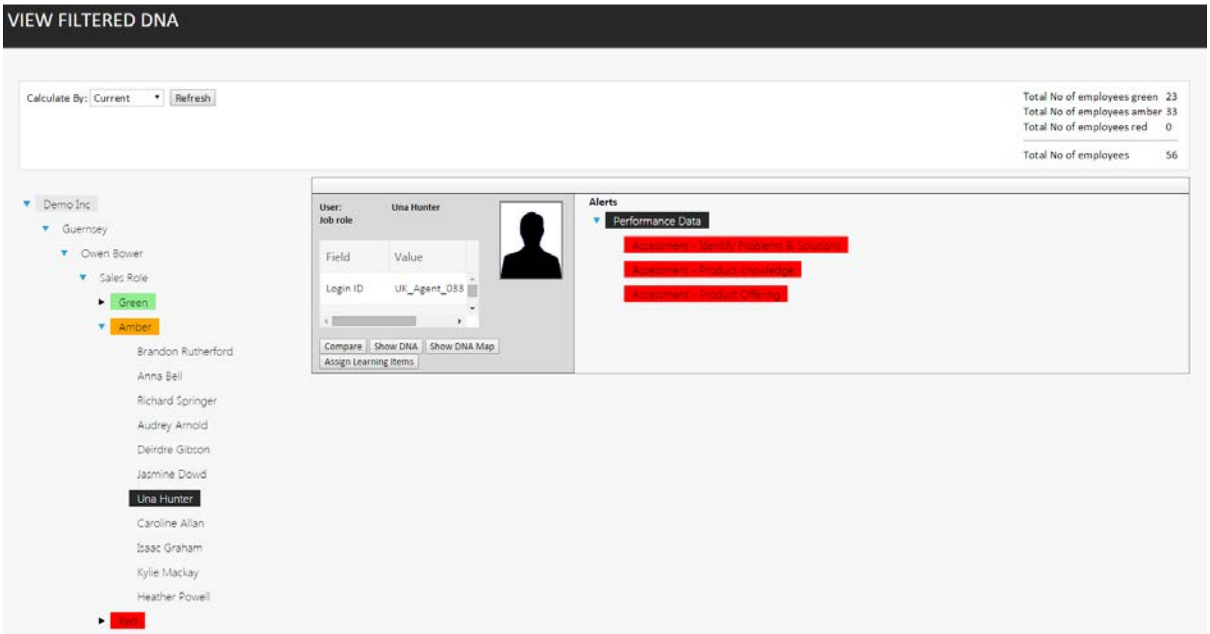


Figure 34: Assigning Learning Items

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.

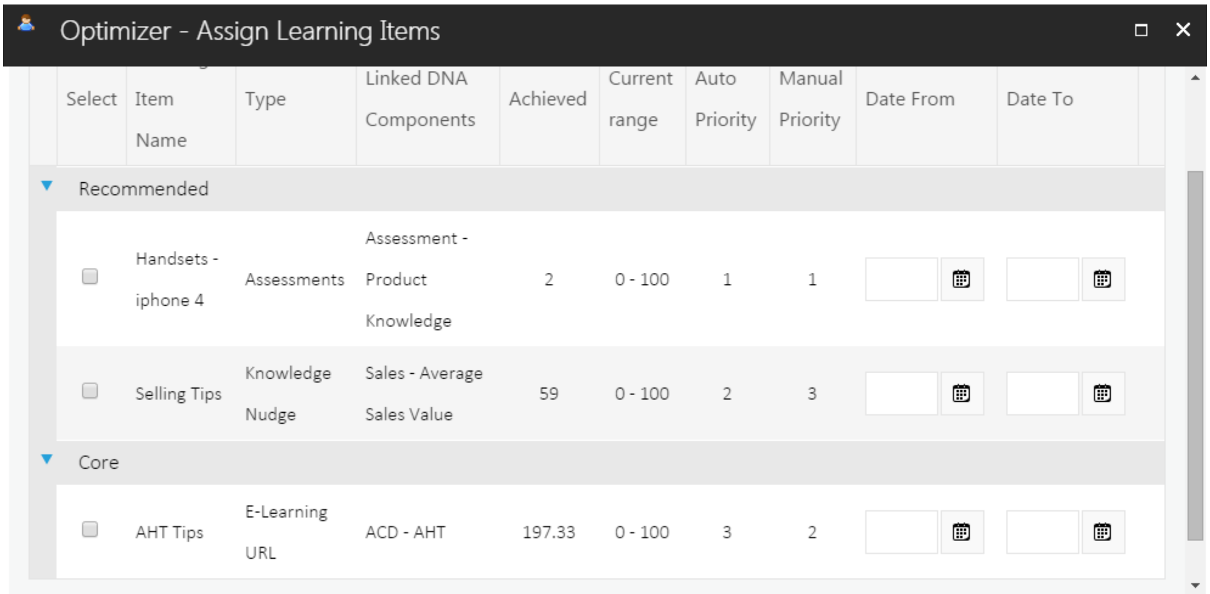


Figure 35: Assigning Learning Items

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

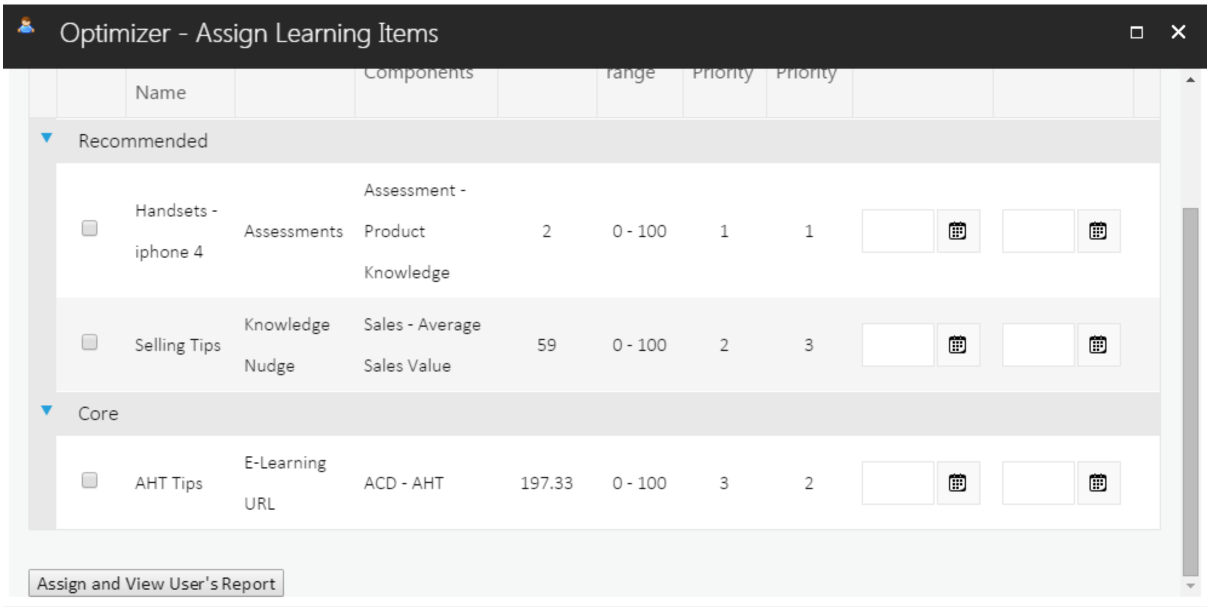


Figure 36: Assigning Learning Items

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.

8 Personal Development Review

The PDR page allows you to manage your Personal Development Review, including creating objectives, adding objective comments and uploading evidence files for objectives.

The PDR page is accessible from the User section of the navigation menu. This page will be divided into multiple tabs with different labels depending on how your company has set up the PDR process. Each tab includes a description of the PDR section and includes a button to add a new objective.

To create a new objective, navigate to the PDR page and select one of the tabs at the top of the page then click the Add Objective button.

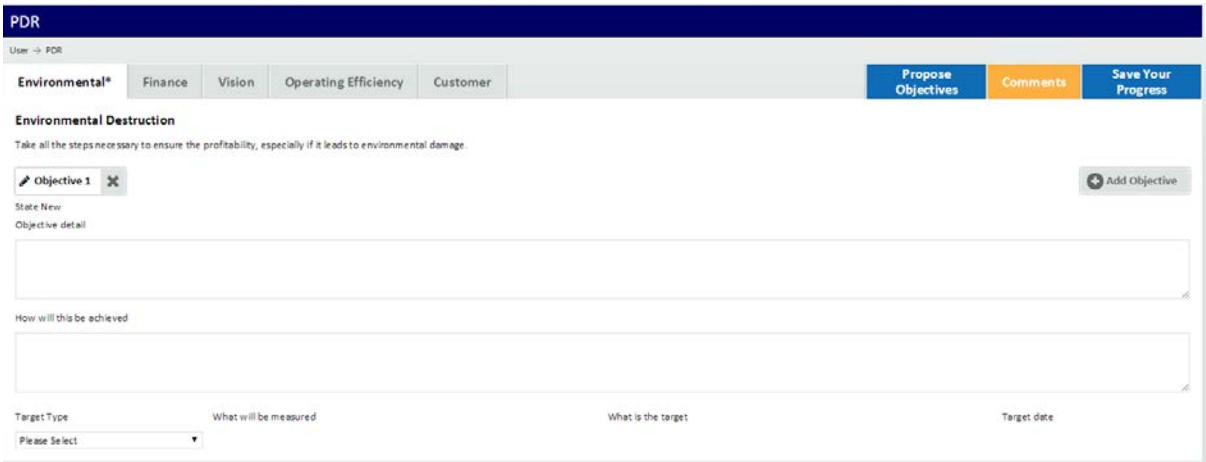


Figure 37: Add objective form

To create a new objective, specify the objective name (optional), objective detail, how will this be achieved and the target type (either goal or measure).

Goal targets require that you specify entries in the following fields:

- What will be measured
- What is the target
- Target date

If you create a measured target, the following fields will be required:

- DNA/KPI (via the 'What will be measured' dropdown box)
- What is the target (this must be a numeric value)
- Target date

You may be required to provide multiple targets for the objective, e.g. target, stretch and super-stretch, depending on how your company have defined the PDR process.

Once you've entered the required information, click the Save Your Progress button to save the new objective. To delete a saved objective, navigate to the tab that includes the objective, then click the 'X' icon next to the objective name at the top of the page.

Note: Once you've proposed an objective/objectives to your manager, you will no longer be able to delete them. Your manager will be able to delete or approve them.

Once you're happy with your objectives, click the Propose Objectives button. This will change the state of all new objectives to 'pending approval'. They will then become visible to your manager who will review them and either approve or delete them.

If the manager approves your objectives, they will become visible again in the PDR page and you will be able to add comments and upload evidence file to prove that you have completed the objective. These two options will appear at the bottom of the objective display in the PDR page.

Figure 38: Comments and file upload section

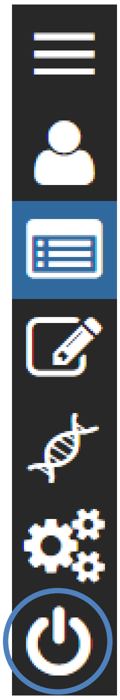
The Comments tab at the top-right of the page also allows you to submit a comment to your manager regarding your PDR.

You can always return to the PDR page to add more objectives. Each time you add and submit objectives to your PDR, your manager will review the objectives and decide whether to edit and approve or delete them. Your manager will also have access to the PDR comments and file uploads and will be able to review the target level achieved for each PDR objective.

9 Logging Out

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

Collapsed Menu



Expanded Menu

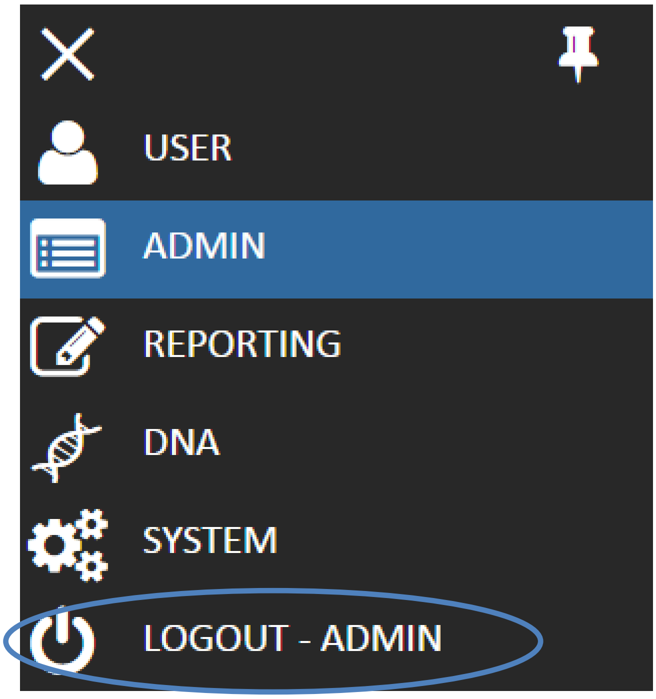


Figure 39: Logout