GENESYS™

Skills Management 9.0.0

Performance DNA Administration Guide

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1 Logging In

Performance DNA 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.

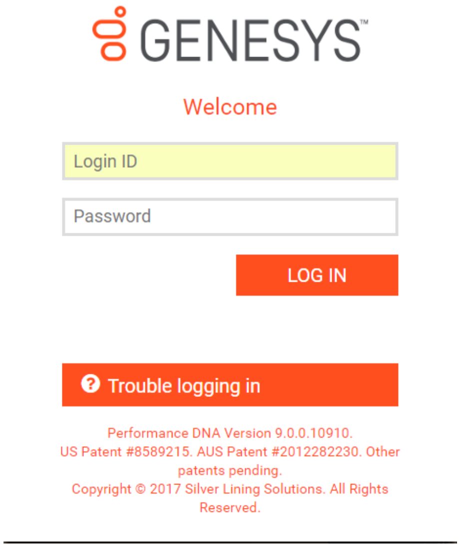


Figure 1: Log on screen

Note: depending on the configuration of the installation, login details may not need to be entered in order to access Performance DNA (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 Performance DNA. The home screen will look different depending on permissions assigned. A home page screen is shown below.

Figure 2: Performance DNA 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 Performance DNA). 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 Performance DNA. 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 Performance DNA

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.

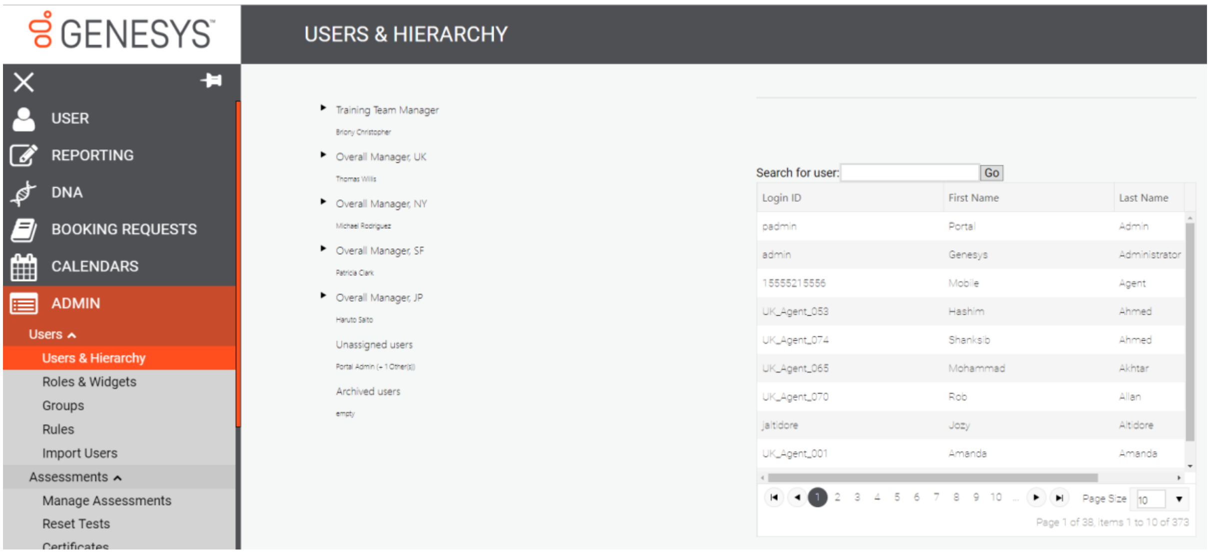


Figure 3: Hierarchy Management

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

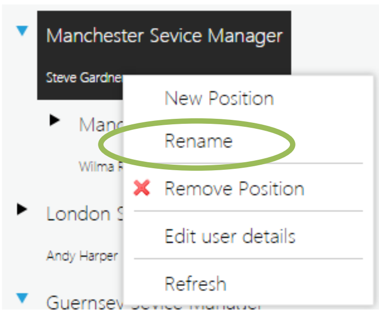


Figure 4: Creating a new position

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.

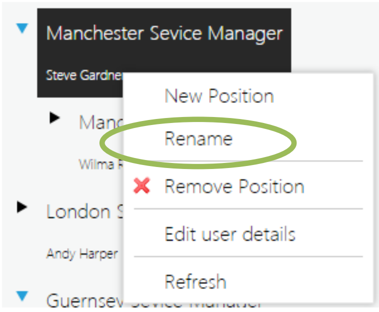


Figure 5: Renaming a position

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.

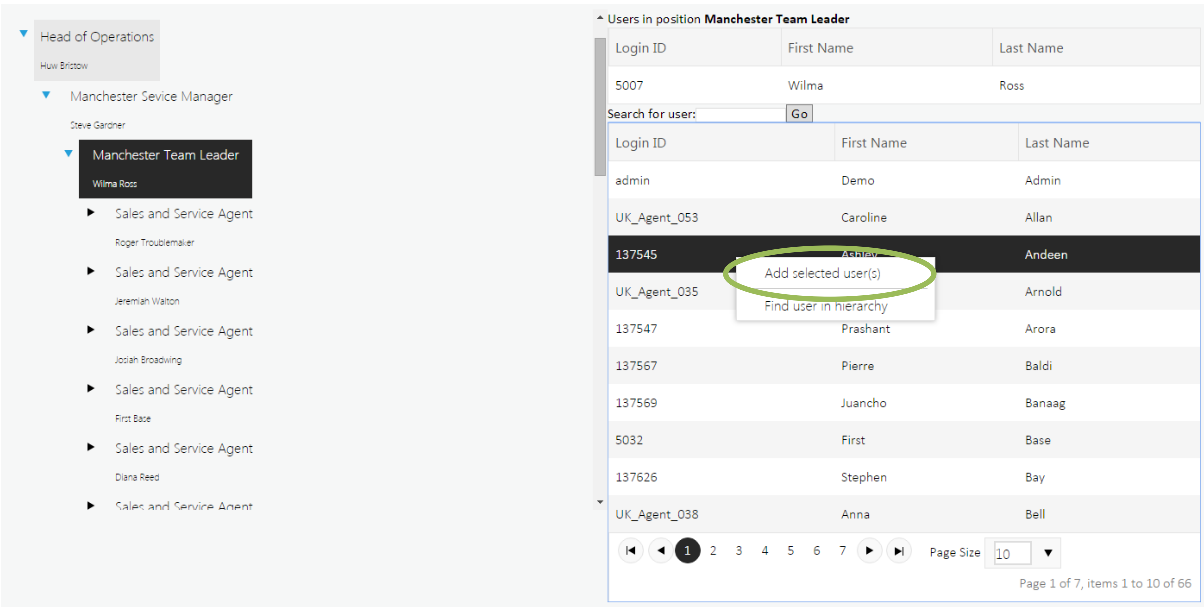


Figure 6: Assigning a user to a position

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.

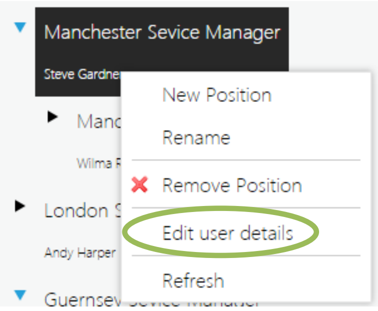


Figure 7: Assigning a user to a position by editing user details

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**.

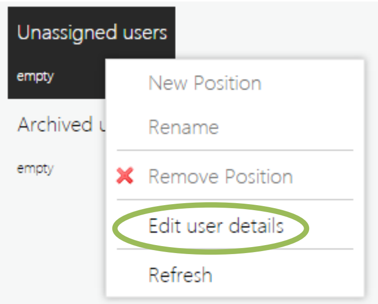


Figure 8: Creating new unassigned users

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.

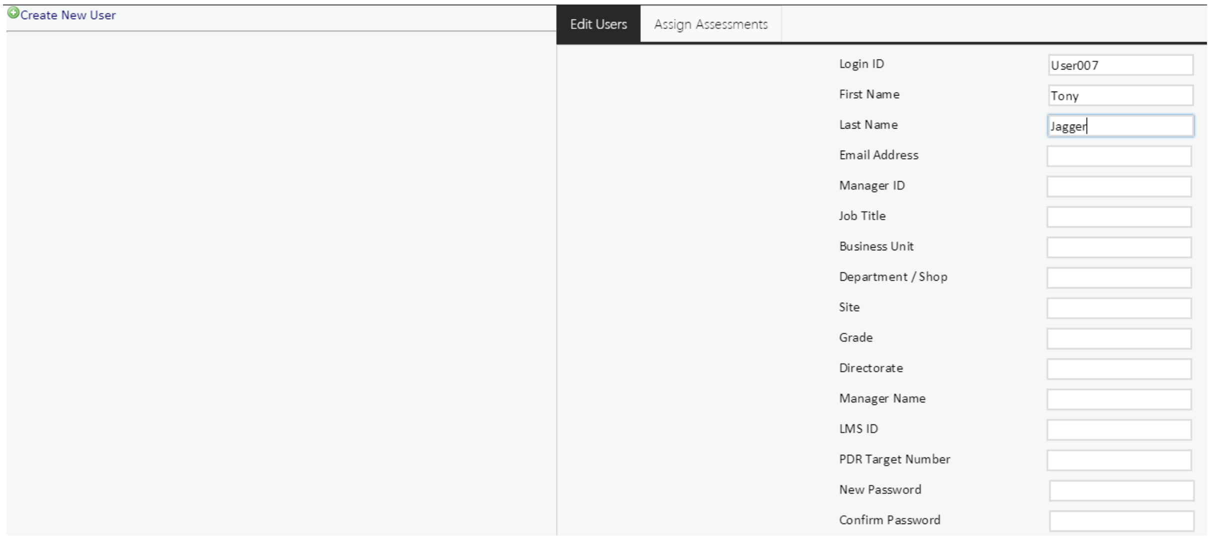


Figure 10: Entering new user details

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

4 Hierarchy Import Functionality

Organizations can upload files containing their organisational hierarchy to be processed as part of the **OrgData Import** using the **Import Users** page.

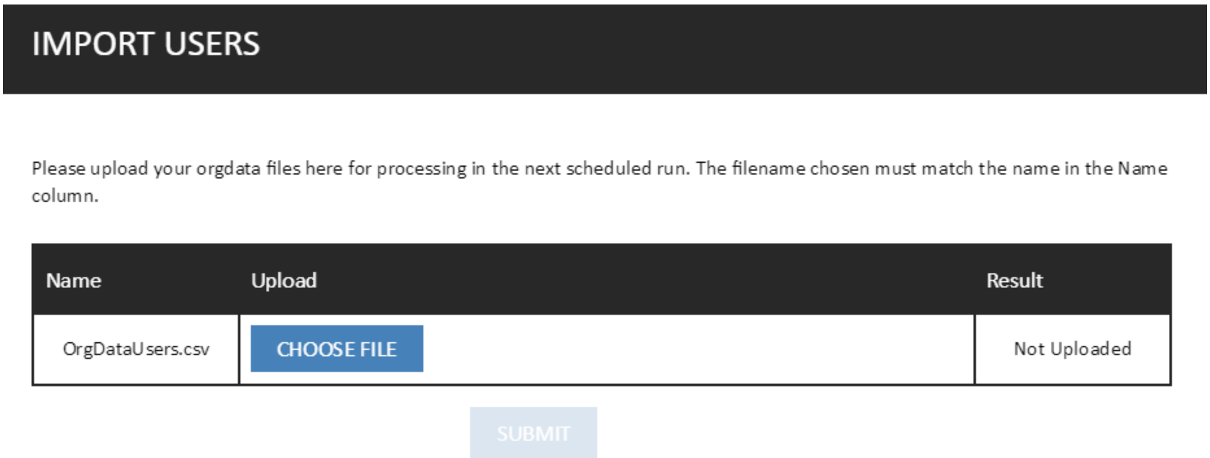


Figure 11: Import Users page

The screen will provide an upload control for each file specified in the import configuration file. These should all be .CSV files.

The following shows an example hierarchy. In this example, Tony Price is the manager at the top level. The format of the file must match that specified in the OrgData configuration for it to be processed correctly.

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

Figure 12: Importing users from CSV file

Choose each of the files that need to be updated and then click on **Submit**.

Once the files have been uploaded they will be processed as part of the next configured **OrgData** run and the user hierarchy will be updated.

Notes:

- If you are managing Training Manager users through Performance DNA, ensure that you have first created and mapped the Portal Employee ID Field mapping in Performance DNA -> 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.
- **OrgData** deletes the file specified after it has been imported.

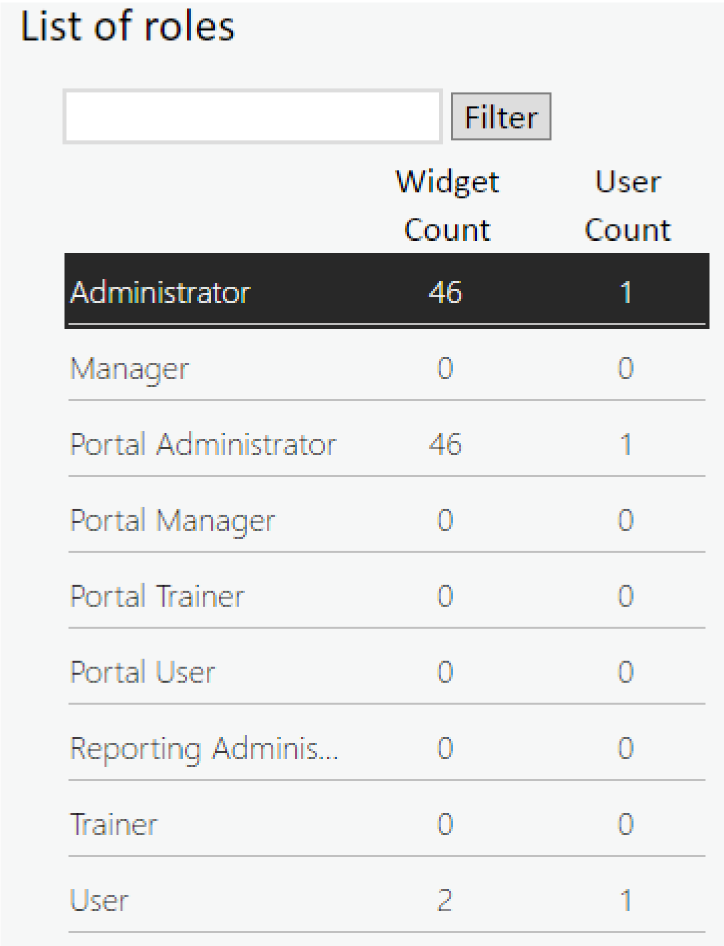
For more information please refer to the **OrgData** documentation.

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 Performance DNA 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 Performance DNA and Training Manager 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 13: 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.

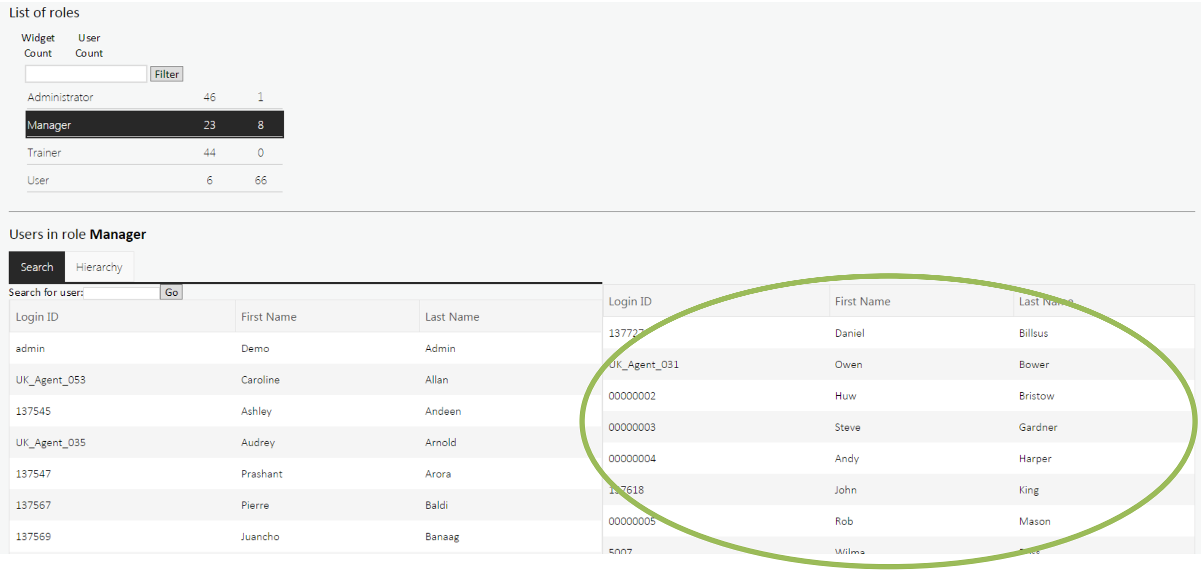


Figure 14: Viewing users with a specific role

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.

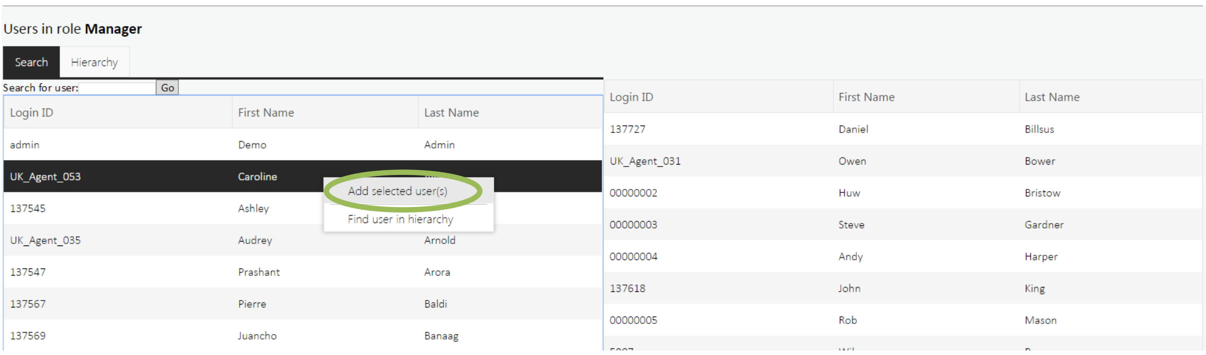


Figure 15: Assigning additional users to a role

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**.

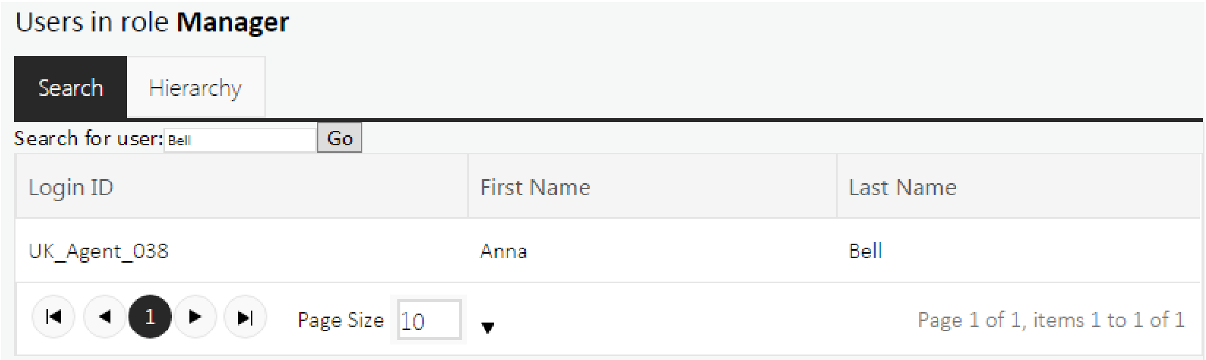


Figure 16: Searching for users

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**.

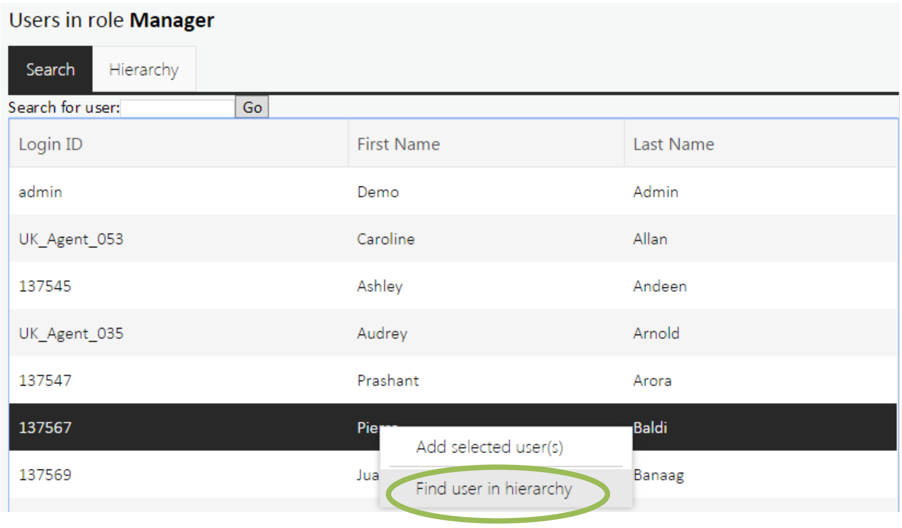


Figure 17: Finding a user in the hierarchy

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

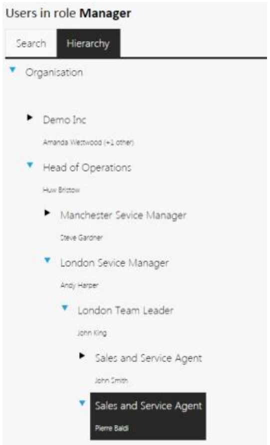


Figure 18: Search results

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 Training Manager will be overwritten using the locations setup in Performance DNA.
- 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 Performance DNA temporarily displaying that the change has been successful, however, the role change has not been saved.

6.1 Built-In Roles

The system has the following built-in roles:

- **Administrator** can see all users regardless of where they sit in the hierarchy, and has initial access to many widgets. The “Roles and Widgets” widget and the Tenant Administrator user cannot be removed from the Administrator role.
- **Manager** is a role for managers. If there are any widgets that you wish managers to see, you can add it to this group.
- **Reporting Admin** can see all users regardless of where they sit in the hierarchy.
- **Trainer** is a role for trainers. Users in the trainer role can be configured to appear for selection before an assessment is taken.
- **User** is a default role for basic users of the system.

The following roles are only available if you have a Training Manager license, and currently provide a fixed list of widgets. Portal Administrators, Trainers and Manager can also create booking requests.

- **Portal Administrator** gives access to various calendars as well as some Portal system administration widgets.
- **Portal Manager** gives access to various calendars, plus allows managers to set their working time.
- **Portal Trainer** gives access to various calendars, plus allows trainers to set their working time.
- **Portal User** allows agents to view their upcoming training/meeting events, and view the training roadmap.

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.
- **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** – Performance DNA 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.

- **DNA Sequencer** – Create and edit DNA Strands / Sequences (combinations of measurable metrics within a job role), representing Job Roles and/or components of those roles.
- **Base Data Definitions** – Create and manage DNA Base Data (KPIs and assessment scores that are part of a DNA Strand).
- **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 Performance DNA to Genesys.
- **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 Performance DNA Email Notification Service
- **Trend Graph** – Show changes in individual/team DNA data over selected date range.
- **Change Password** – Change password
- **Learning Items** – Create and edit Learning items
- **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).

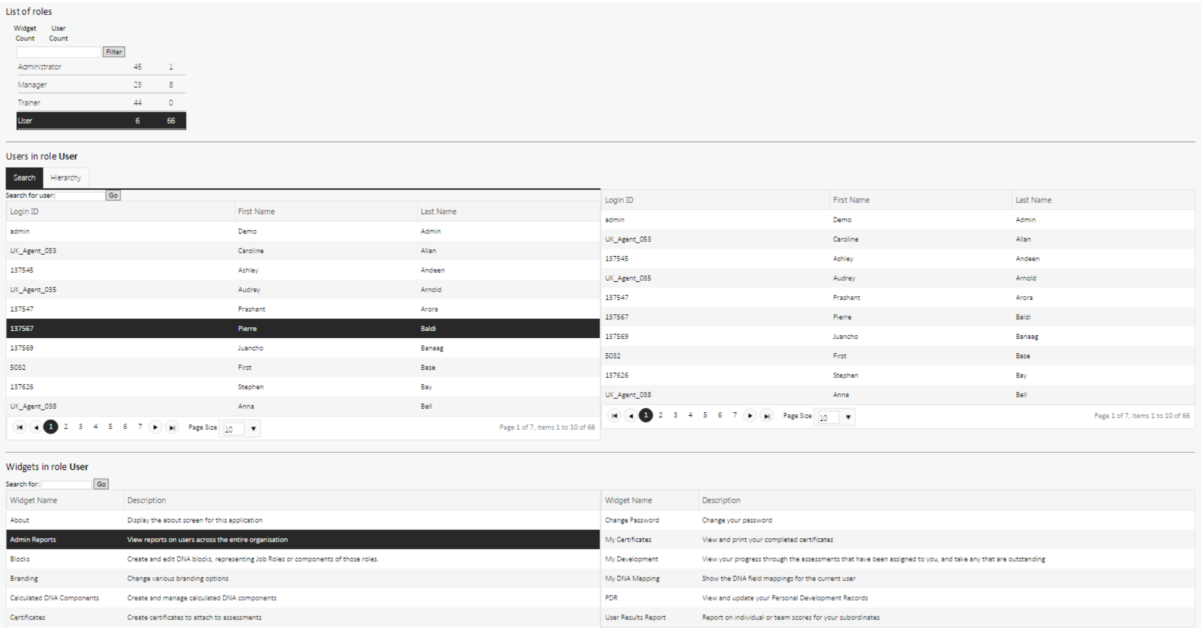


Figure 19: Associating a widget with a role

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).

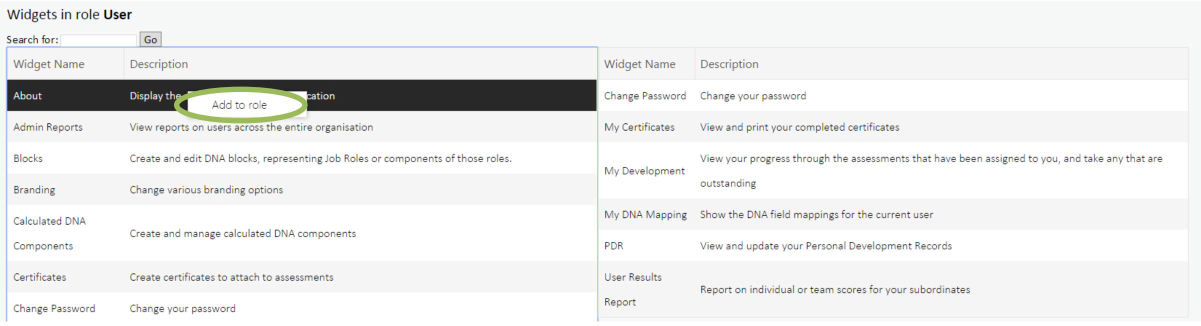


Figure 20: Creating tabs and associating widgets

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.

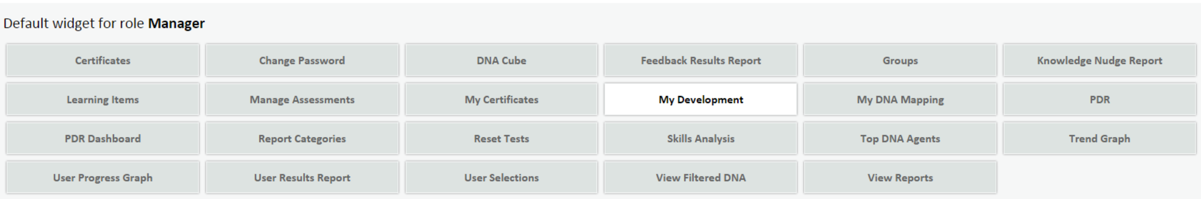


Figure 21: Setting the default widget for a role

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.

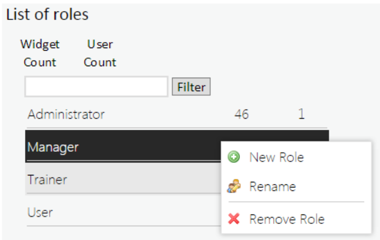


Figure 22: Managing roles

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 Training Manager/Portal users via Performance DNA, create a Portal Employee ID and Portal Username user field to support Performance DNA-Training Manager 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).

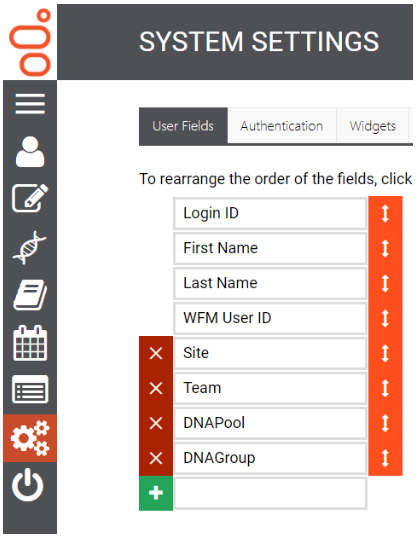


Figure 23: Adding additional user fields

9.2 Authentication

The **Authentication** section contains configuration options relating to **Field Mappings** and **SAML Authentication**.

9.2.1 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.

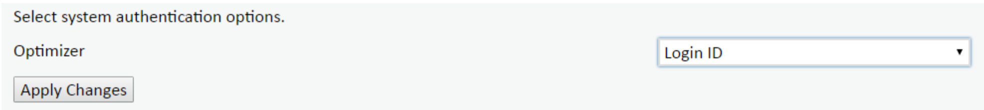


Figure 24: User login credentials

9.2.2 SAML Authentication

The **SAML Authentication** section allows the configuration of identity providers with Skills Management acting as a service provider. Skills Management supports service provider-initiated login for the top enabled IDP and IDP-initiated login for all enabled IDPs.

9.3 Widgets

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

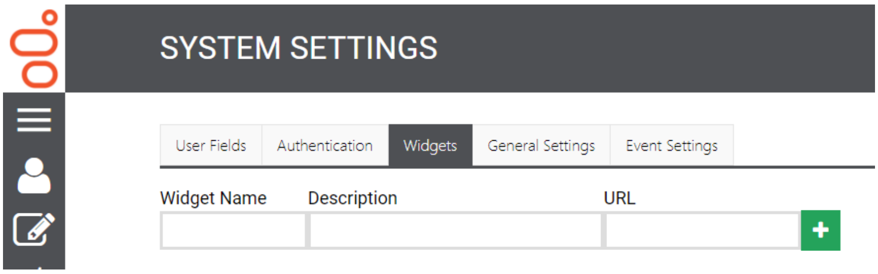


Figure 25: Widgets tab and external widgets

9.4 General Settings

9.4.1 Genesys Settings

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

Username – The username to use when authenticating against GIS.

Password – The passsword to use when authenticating against GIS.

Proxy app name – The proxy application name.

GIS Host – The host name of the GIS instance.

GIS Port – The port on which the GIS instance is accessible.

GIS Tenant – The name of the GIS Tenant with which to integrate.

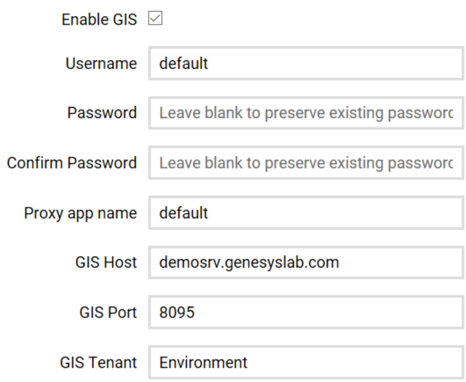


Figure 26: Genesys Settings

9.4.2 Proxy Settings

The proxy settings configure the proxy server to use when integrating with other systems. The use of a proxy can be enabled on a per-integration basis.

Proxy Server – The full URL of the proxy server, including port number. For example, *http://lmsproxy.domain.com:1234* or *https://192.168.123.45:7890*

Proxy User Name – The user name to use for the proxy if authentication is required.

Proxy Password – The password to use for the proxy if authentication is required.

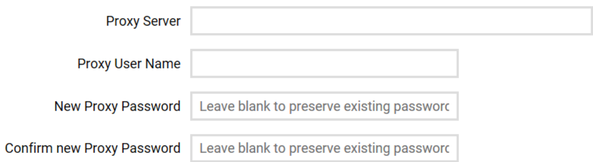


Figure 27: Proxy Settings

9.4.3 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 Proxy Enabled – Whether to use the configured proxy settings for connecting to the LMS.

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

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

LMS UserID Field – Select the Performance DNA user field that contains the User’s LMS UserID.

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

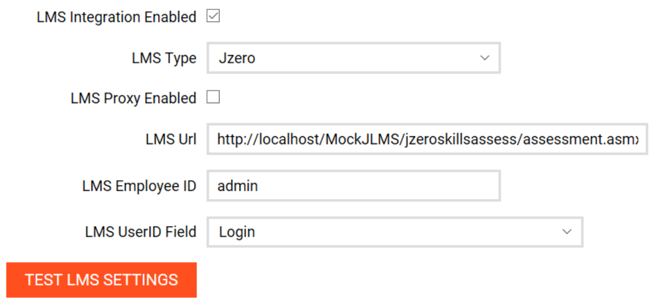


Figure 28: LMS Settings

9.4.4 Exchange Settings

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

Exchange Proxy Enabled – Whether to use the configured proxy settings for connecting to Exchange.

Exchange Access Username – The username of the account used to access Exchange.

Exchange Access Password – The password of the account used to access Exchange.

Discover Exchange WS URL – This button will attempt to autodiscover the URL of the Exchange Web Service.

Exchange Web Service URL – The URL of the Exchange Web Service. This can be manually entered if autodiscovery fails.

Test Exchange Settings – Validates the Exchange settings and connection.

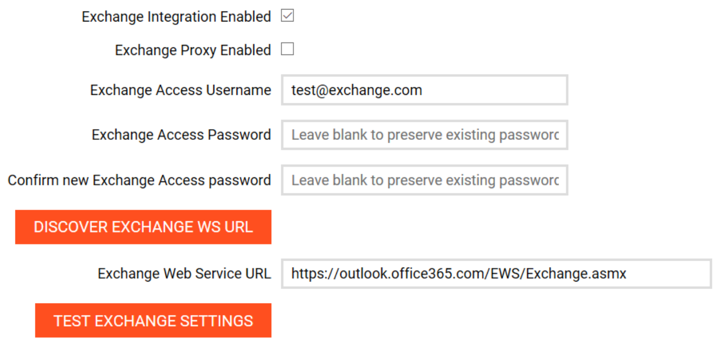


Figure 29: Exchange Settings

9.4.5 Email Settings

Message Manager on Assessment Completion – Whether to message a user's manager when that user completes an Assessment.

Email Field – The User Field containing a user's email address.

From Address for Event Emails – The from email address that appears on event emails.

Sender Name for Event Emails – The sender name that appears on event emails.

SMTP Server – The SMTP Server name from which event emails are sent.

SMTP Port – The port over which the SMTP server is accessed.

Enable TLS for SMTP – Enables Transport Layer Security when accessing the SMTP server.

Use SMTP Default Credentials – If this is enabled then default credentials will be used to connect to the SMTP server. Otherwise the username and password must be provided.

SMTP Username – The username to use when accessing the SMTP server.

SMTP Password – The password to use when accessing the SMTP server.

Use Default Organiser – If this is enabled then the default organiser will be used for event emails.

9.4.6 Other 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.

Correlation Period (Days) – The number of days' worth of data either side of a learning item being taken to use to analyse its impact.

Learning Item Impact Period (Days) – The number of days into the past to search when performing analysis of learning item impact.

Percentage Correlation Threshold for Learning Item Auto-Assignment – The correlation threshold above which learning items will be automatically assigned to users for whom the learning items are recommended based on their data scores.

Automatically assign learning items – Whether to automatically assign learning items when the correlation matches or exceeds the percentage correlation for learning item auto-assignment.

AICC Student ID Field – The User Field used to identify a user in the integrated LMS. Used only when integrating with a third-party LMS (Learning Management System).

AICC Suppress Put Param – Suppressed PUT parameters when communicating with the LMS over AICC.

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 chart that is shown 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.

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

EWM Enabled – Whether to enable integration with an EWM system. If this is enabled then the other EWM settings are visible.

EWM Proxy Enabled – Whether to use the configured proxy when connecting to EWM.

EWM URL Endpoint – The full URL of the EWM Endpoint.

Performance DNA URL – The URL of the installed Performance DNA application.

Enable Third-Party Authentication – Whether to enable users to log in using custom third-party authentication.

Third-Party Authentication Login Page URL – The login page of the third-party authentication provider.

Third-Party Authentication Logout Page URL – The logout page of the third-party authentication provider.

User Field for Third Party Authentication – The user field to use when mapping users from the third-party system.

Reporting API Identifying User Field – The user field to identify a 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 Performance DNA-Training Manager 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 Performance DNA-Training Manager user integration.

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

User Location Delimiter – The single character delimiter used for the locations field.

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 Assessment Completion 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.

9.5.3 Process Queued Booking Requests

This event processes a booking request queued through Skills Portal.

9.5.4 Process Email Queue

The event processes queued emails.

9.5.5 Process Learning Items Queue

This event processes the assignment of queued learning items.

9.5.6 Learning Item Auto Rank

This event generates automatic ranking numbers for links between learning items and user performance data and automatically assigns those which exceed the correlation threshold if learning item auto-assignment is enabled.

For any links that have been created between learning items and user performance data, this event finds instances of users taking the learning item within the impact period before the time of the event running. It then retrieves user data within the correlation period either side of these instances, performs a correlation and then assigns the correlation percentage to the auto rank value of the learning item.

If learning item auto-assignment is enabled, this event then proceeds to find users whose performance data scores for the impact period fall within the assignment ranges of linked learning items and assigns those learning items to matching users.

9.6 HTTPS Support

The services, sites and Training Manager 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.

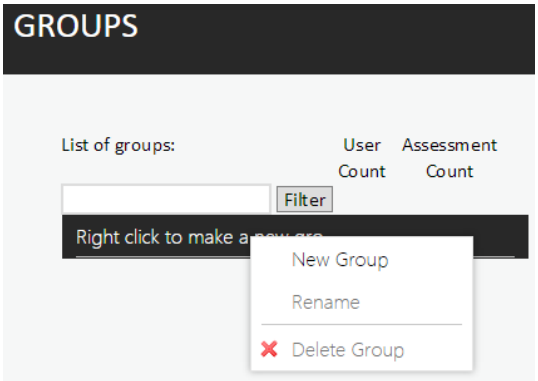


Figure 30: Managing groups

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.

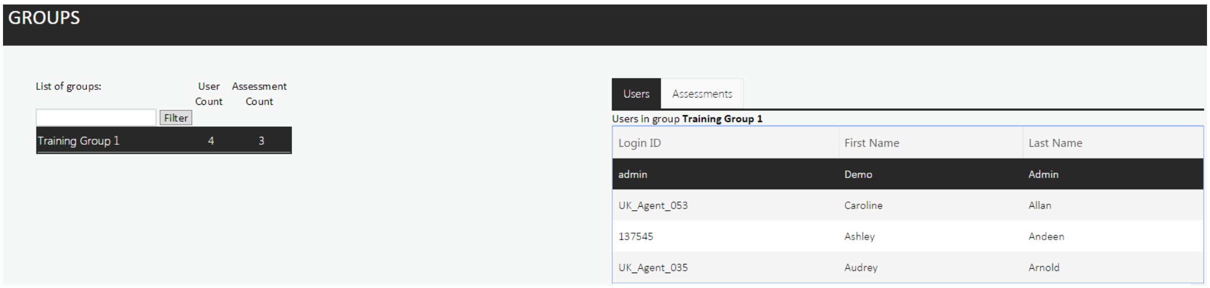


Figure 31: Viewing a group's users

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**.

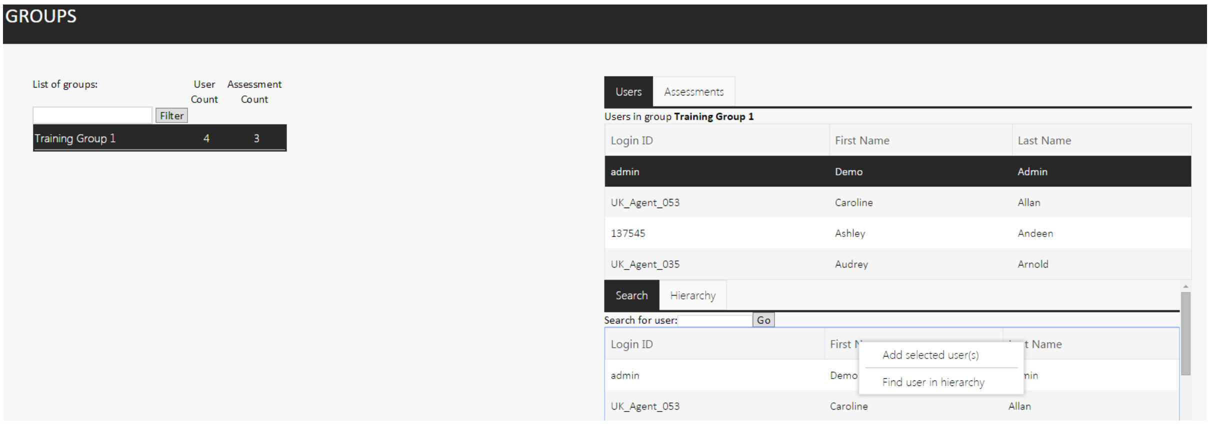


Figure 32: Adding a user to a group

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**.

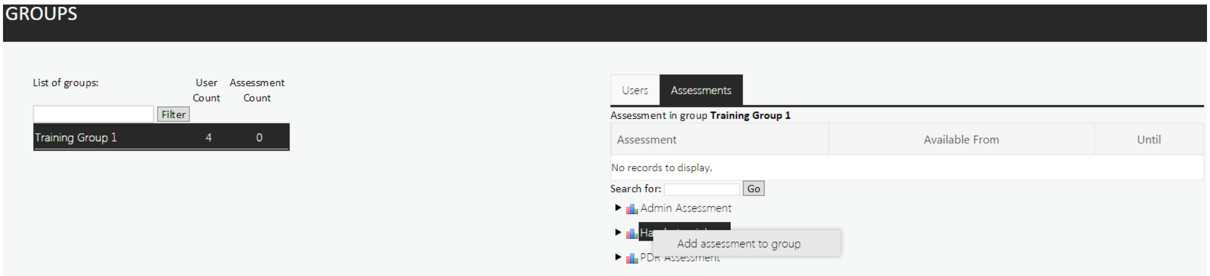


Figure 33: Associating assessments with groups

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.

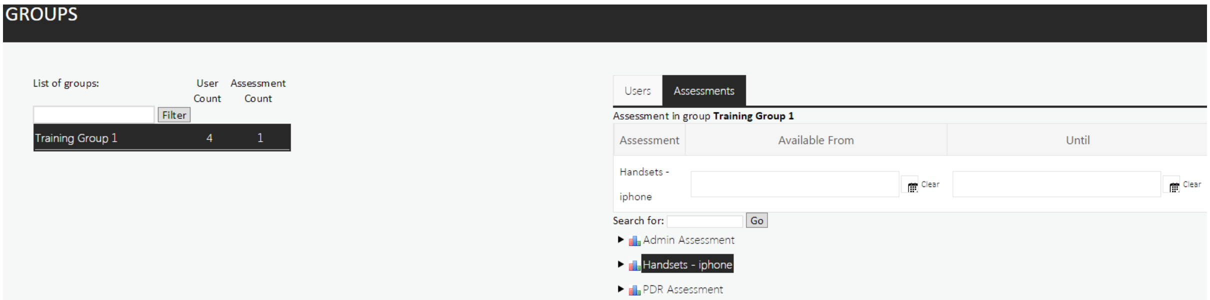


Figure 34: Setting assessment dates

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.

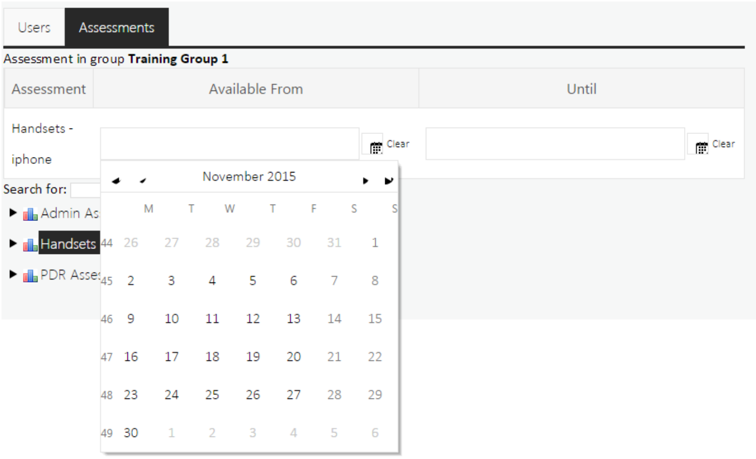


Figure 35: Setting assessment dates

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.

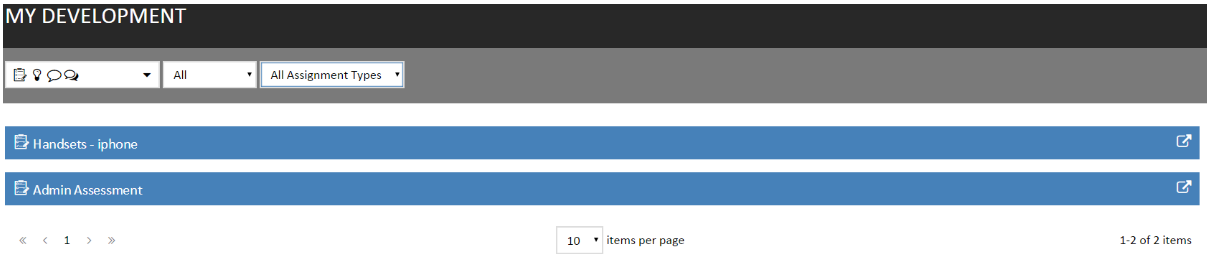


Figure 36: View assessment and assigned completion dates

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.

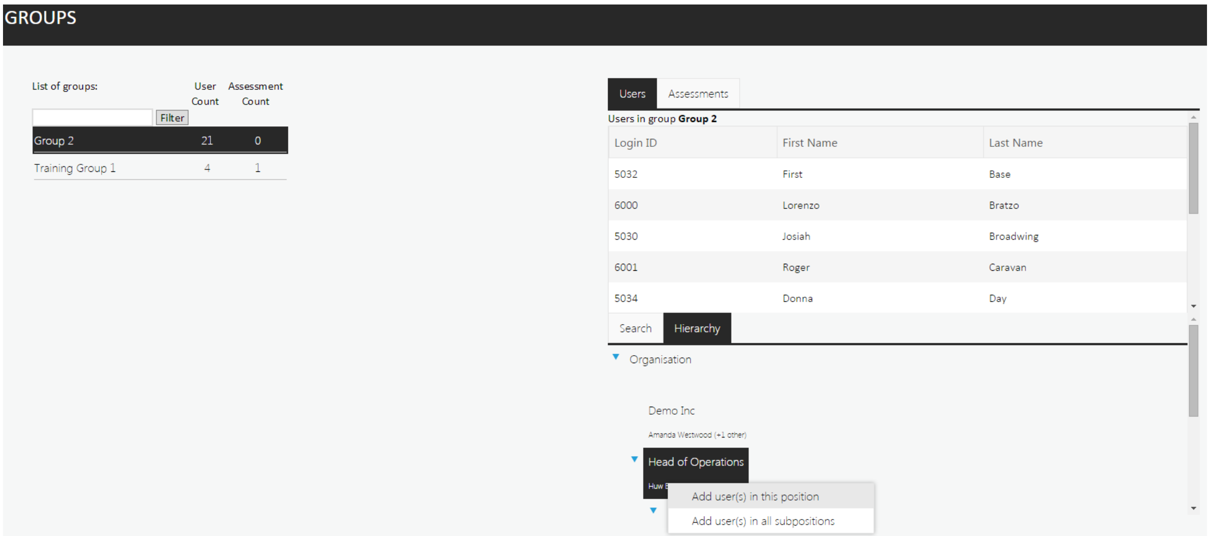


Figure 37: Assigning users to groups based on hierarchy

11 Rules-Based Assignments

Performance DNA 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.

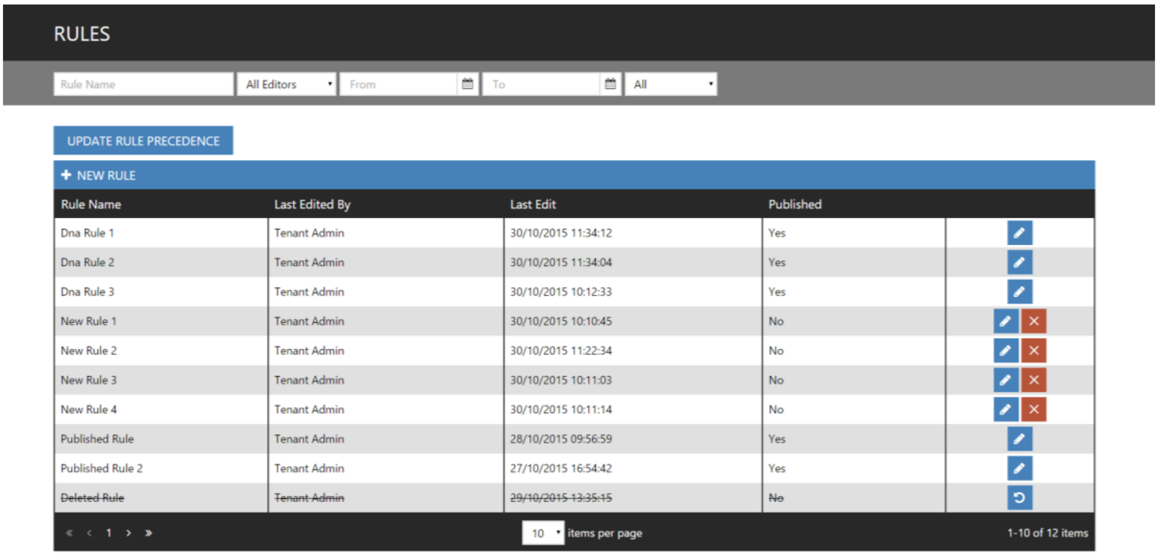


Figure 38: Rules Grid

11.1 Rule Logic

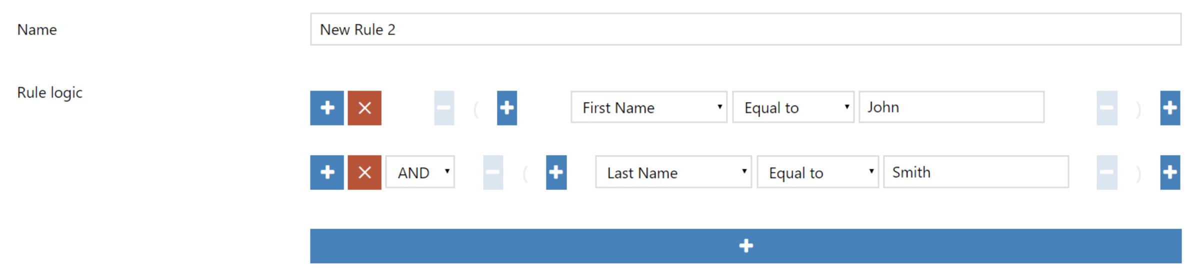


Figure 39: Rule logic editor

Each rule must be given a unique name for clarity.

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 Strands.

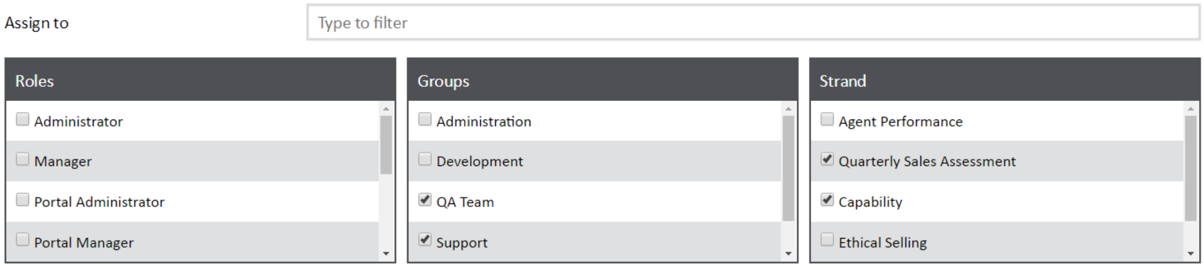


Figure 40: Rule assignment selection

11.3 Workflow

Figure 41: 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.

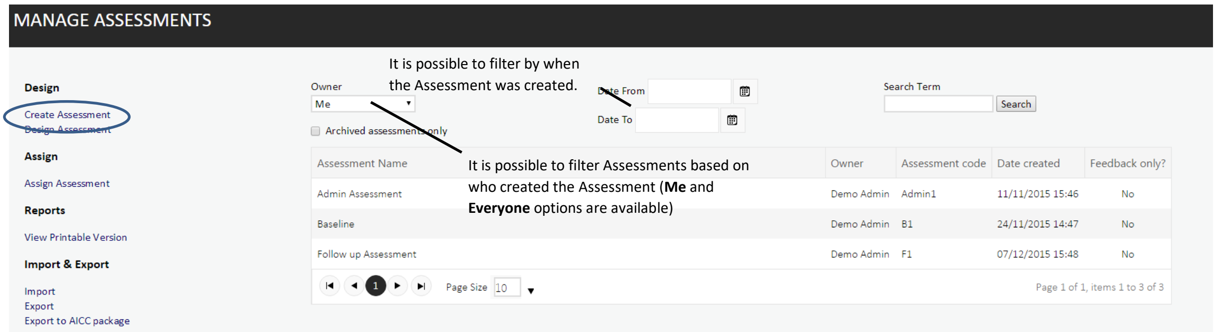
12 Manage Assessments

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 42: 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.

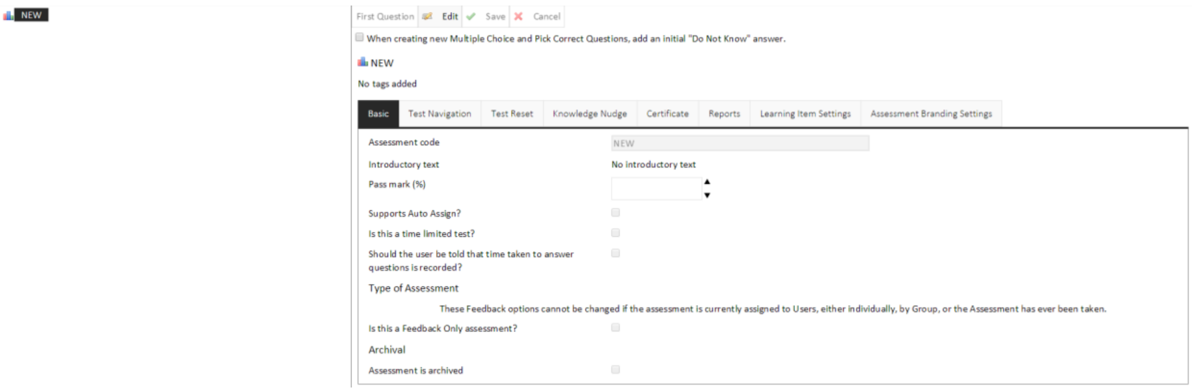


Figure 43: Creating assessments

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

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

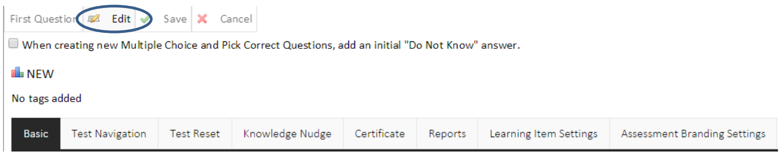


Figure 44: Editing assessment details

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 Performance DNA 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.

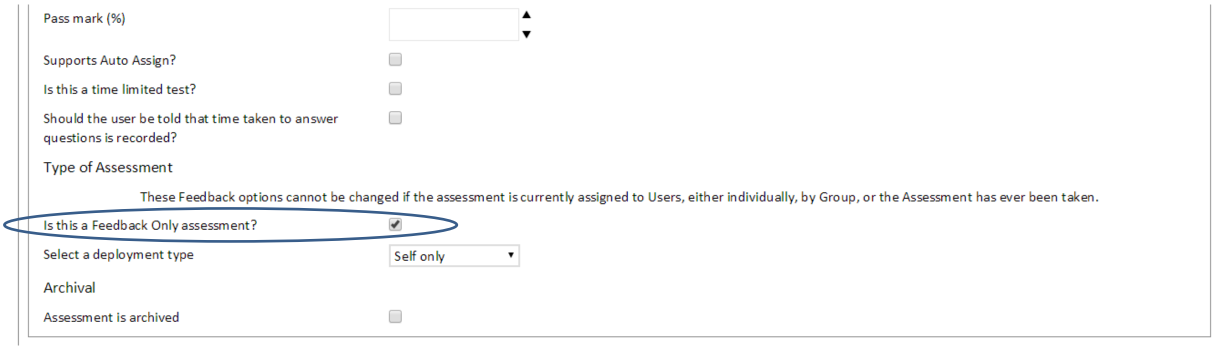


Figure 45: Feedback only and archive settings

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

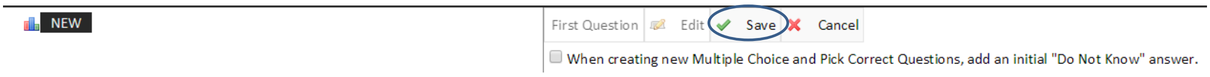


Figure 46: Saving changes

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.

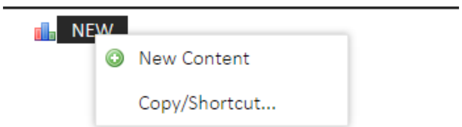


Figure 47: Adding new content to an assessment

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.

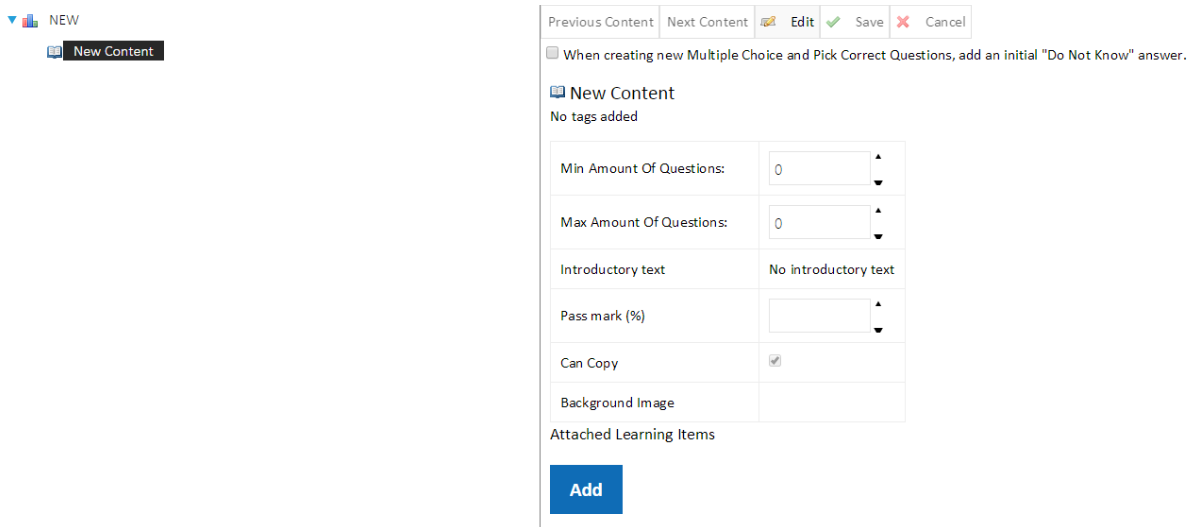


Figure 48: Assessment settings

12.1.3 Questions

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

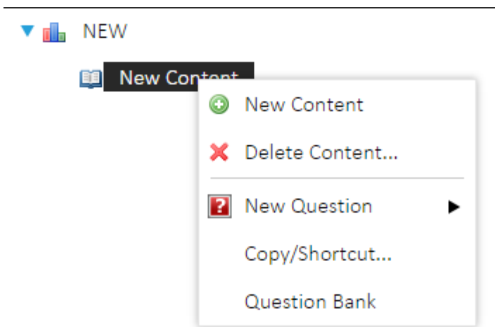


Figure 49: Adding questions to assessments

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

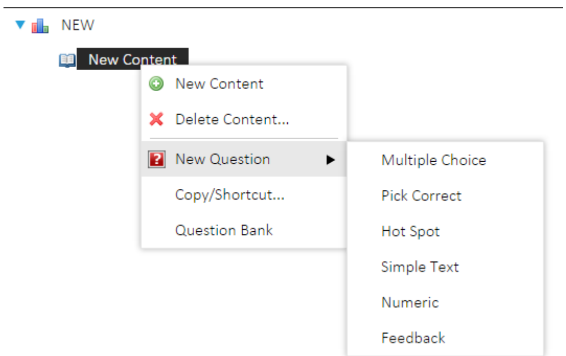


Figure 50: Setting the type of new questions

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.

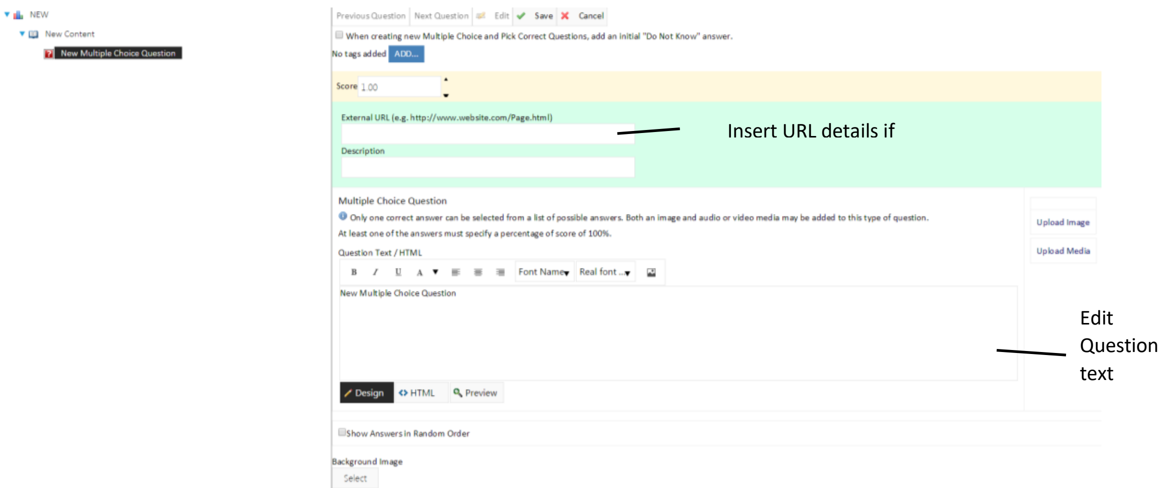


Figure 51: Adding external URLs to questions

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.

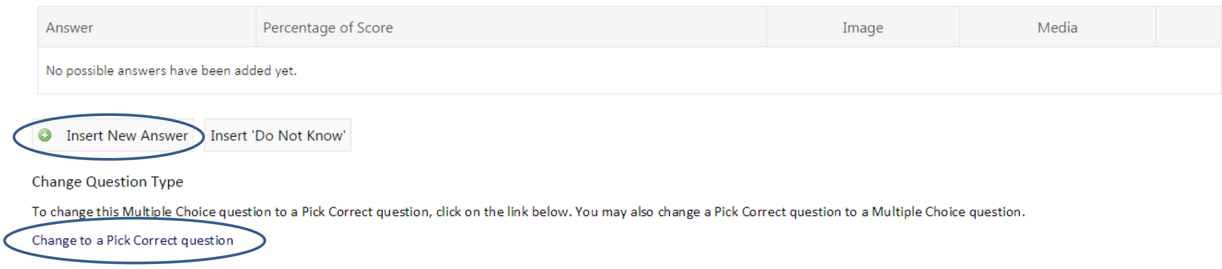


Figure 52: Changing question types and adding answers

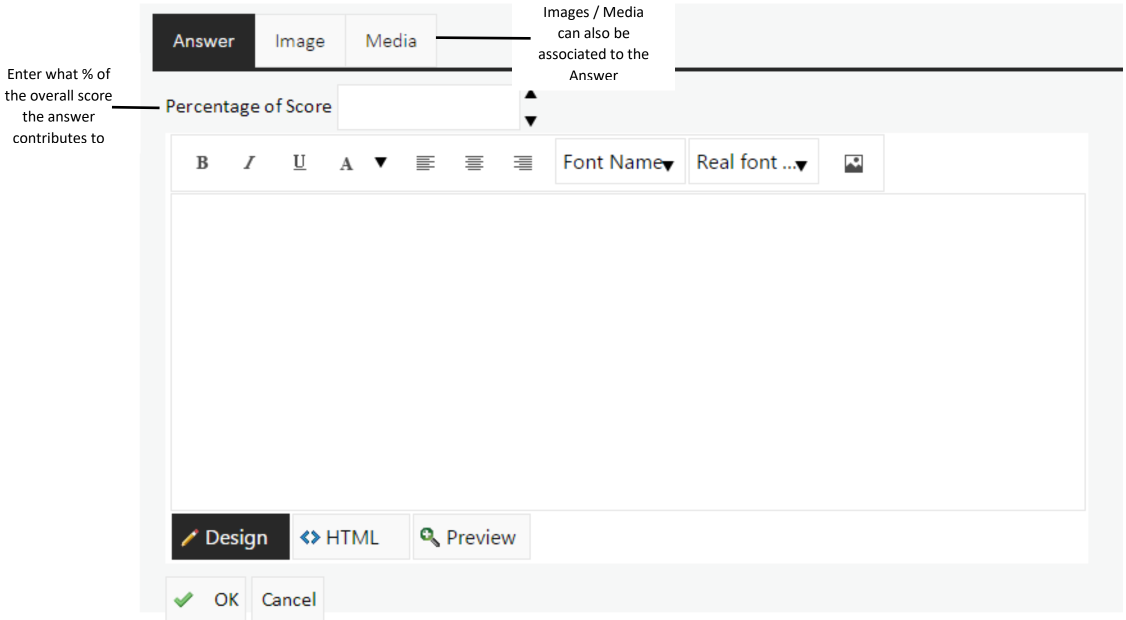


Figure 53: Setting question value, additional media and text

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 Performance DNA. The in-built media player may work with other media formats but these are not supported.

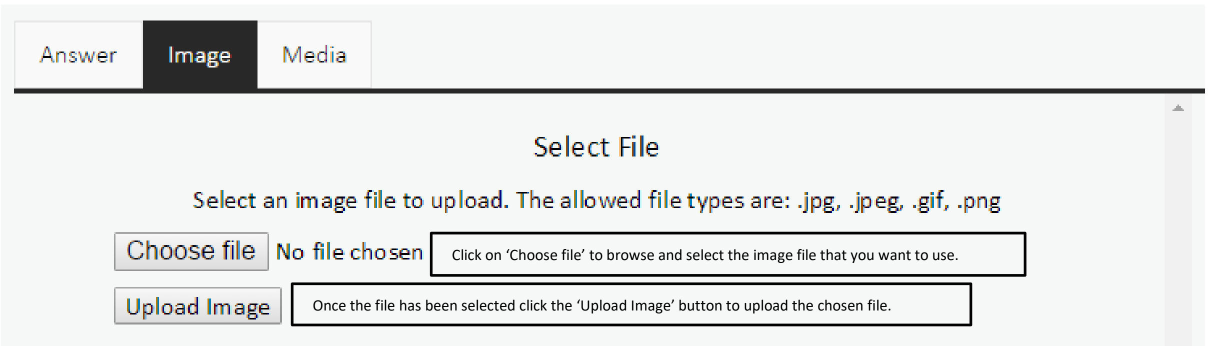


Figure 54: Adding an image to an Answer

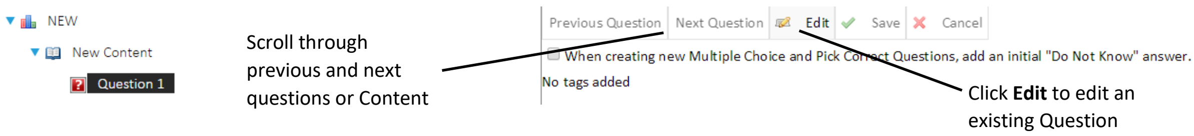


Figure 55: Editing and navigating between Assessment Questions

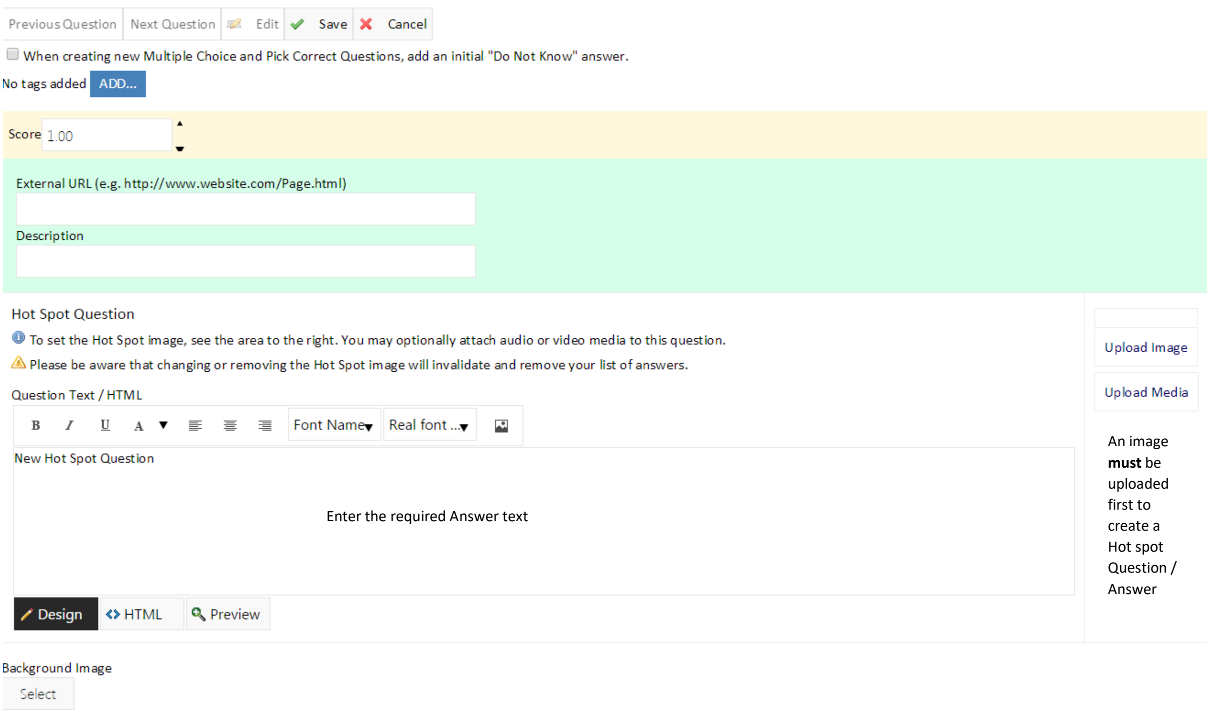


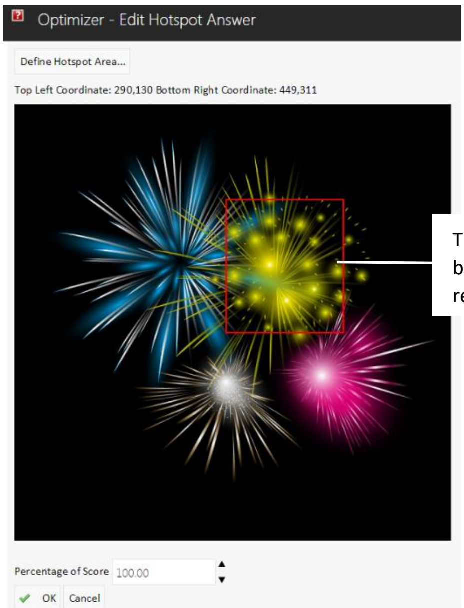
Figure 56: Preparing a hot spot image question

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 57: Defining a hot spot answer area



This will create a red box around the required answer

Figure 58: Defining a hot spot answer area

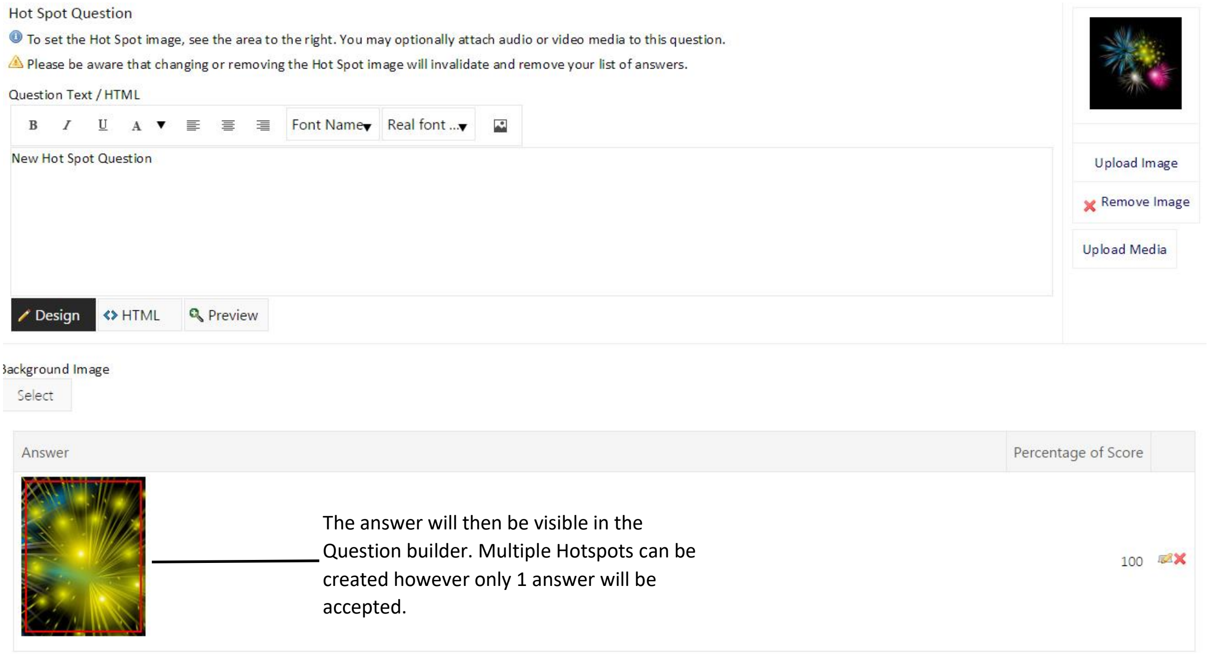


Figure 59: Display of hot spot answer

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

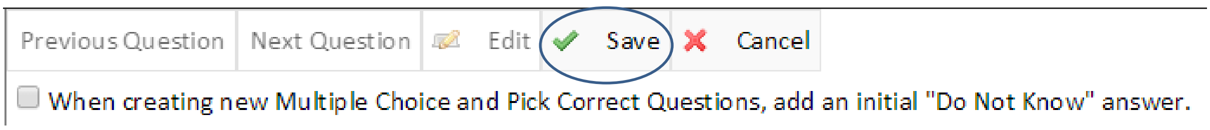


Figure 60: Saving completed questions

Simple Text Question

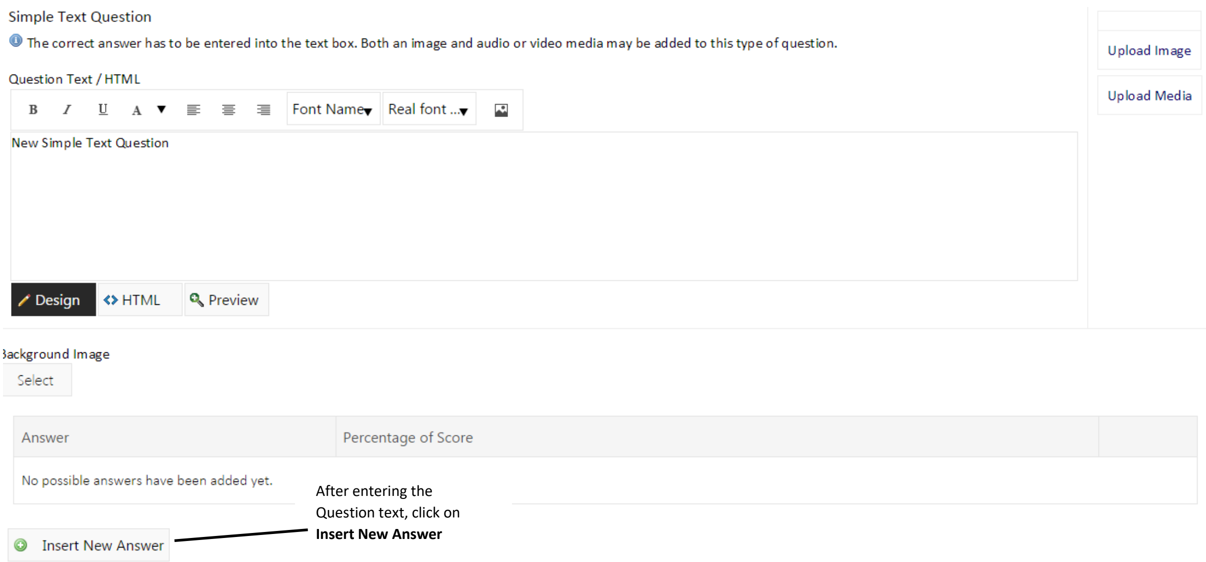


Figure 61: Creating question text and adding an answer

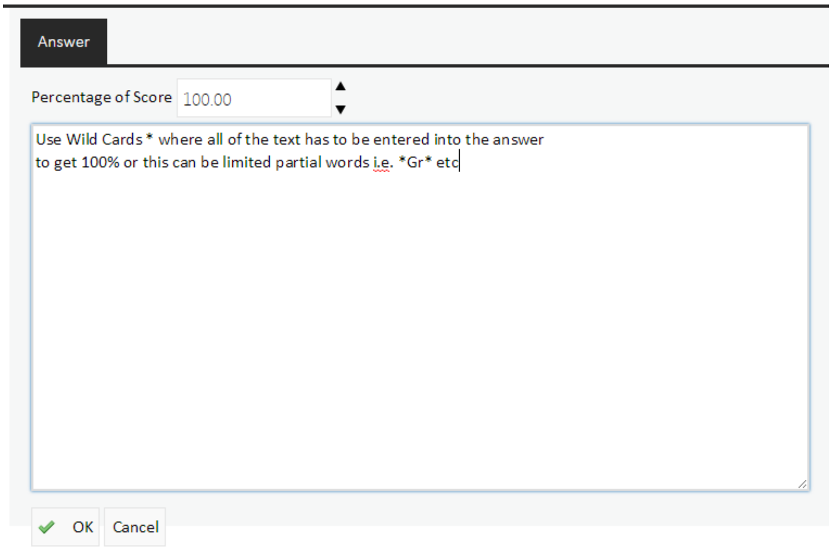


Figure 62: Adding answers and using wild cards

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

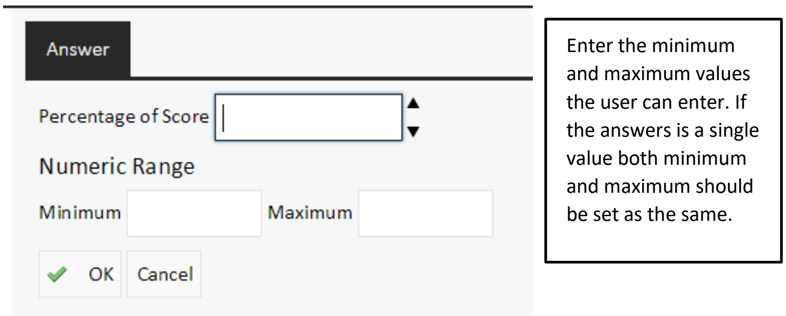


Figure 63: Delimiting ranges for numeric questions

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.

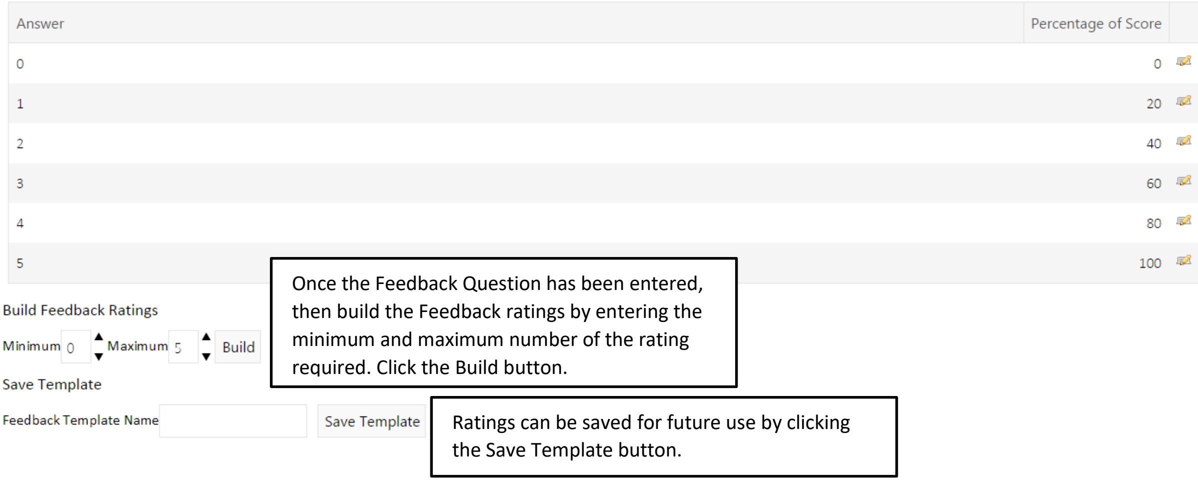


Figure 64: Delimiting ranges for feedback ratings

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.

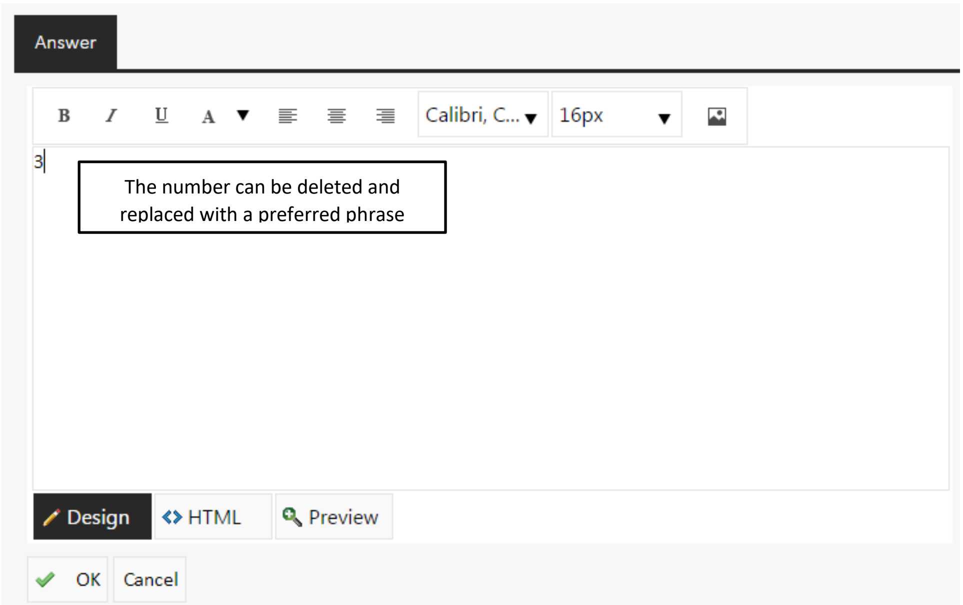
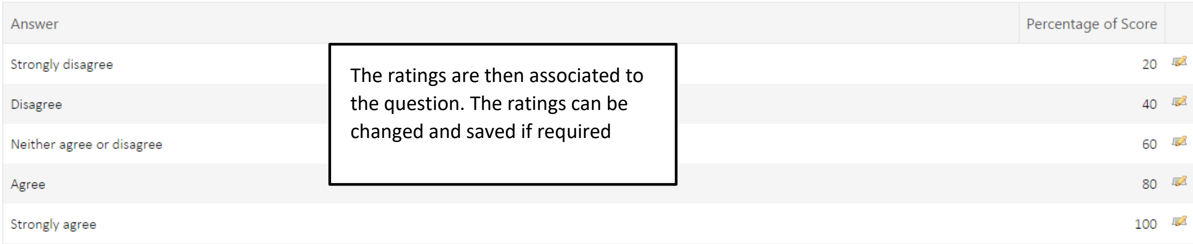


Figure 65: Adding detail to ratings



Answer	Percentage of Score
Strongly disagree	20
Disagree	40
Neither agree or disagree	60
Agree	80
Strongly agree	100

Figure 66: Display of rating detail and associated question

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

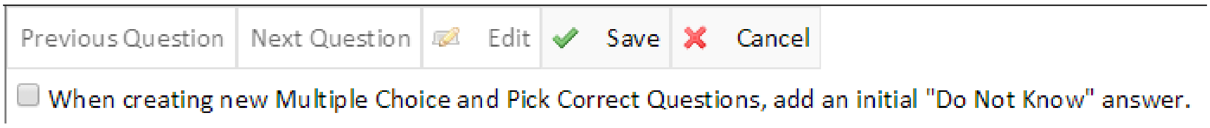


Figure 67: Editing existing questions

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

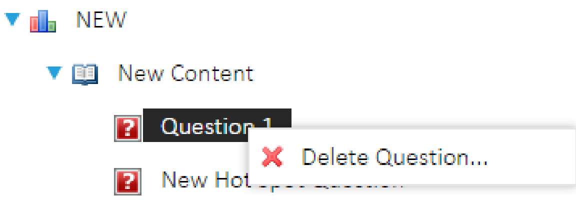


Figure 68: Deleting questions

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.

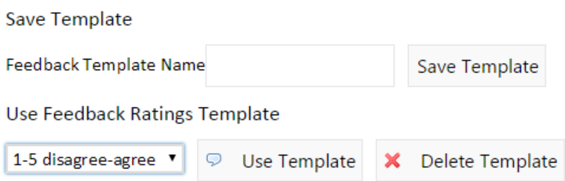


Figure 69: Associating existing templates with feedback questions

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

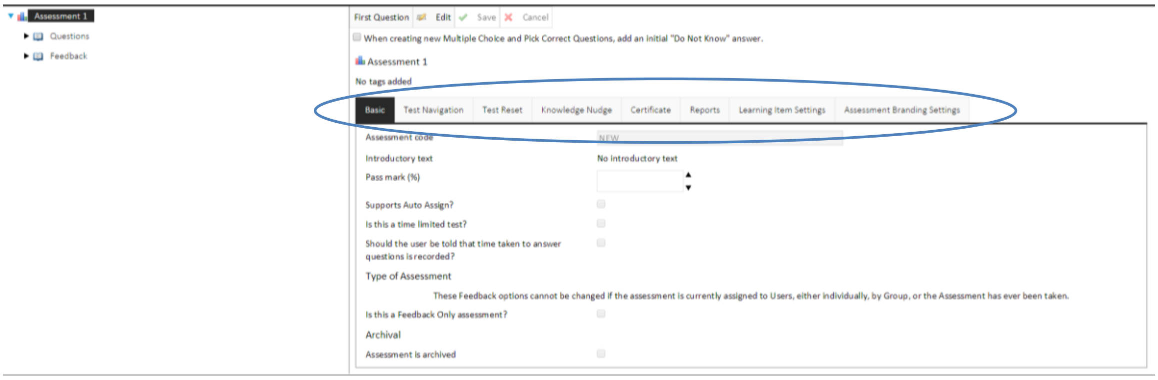


Figure 70: Accessing additional assessment detail and options

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.

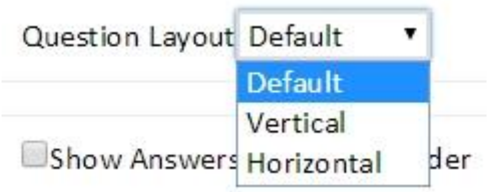


Figure 71: Question Layout Option

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

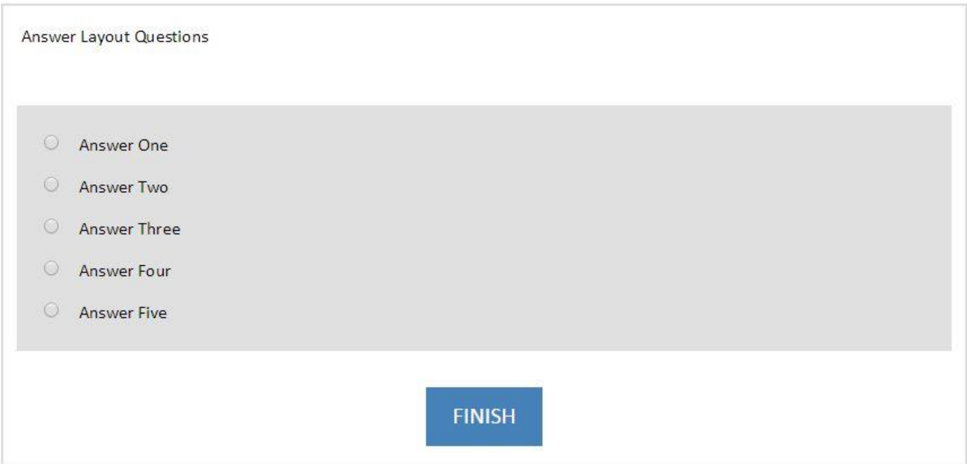


Figure 72: Vertical Answer Alignment

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

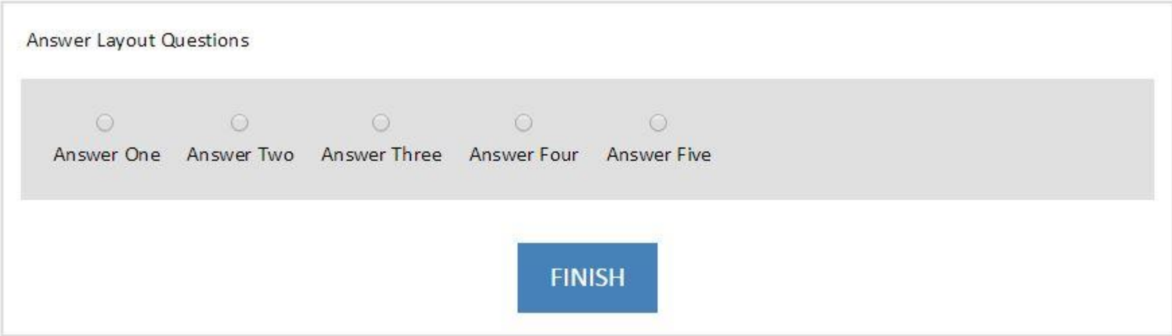


Figure 73: Horizontal Answer Alignment

12.1.5 Test Navigation

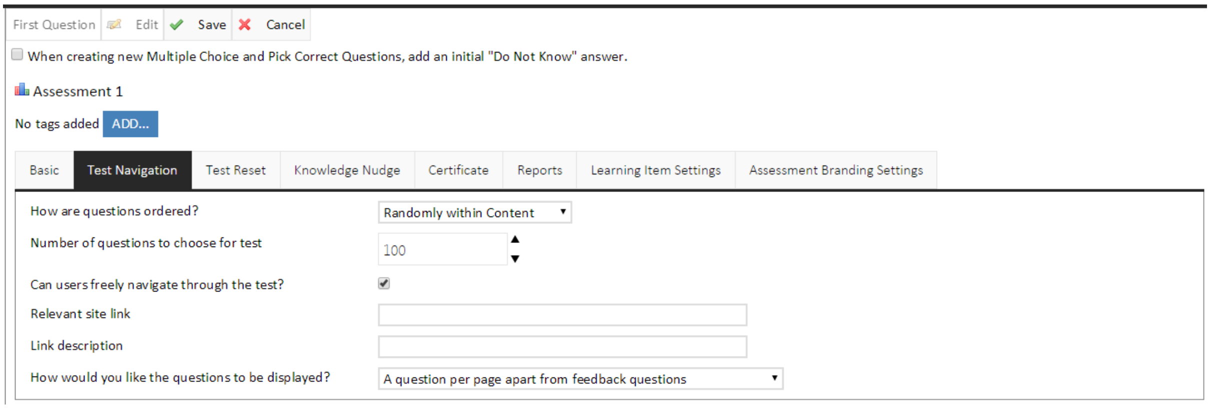


Figure 74: Test navigation tab

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

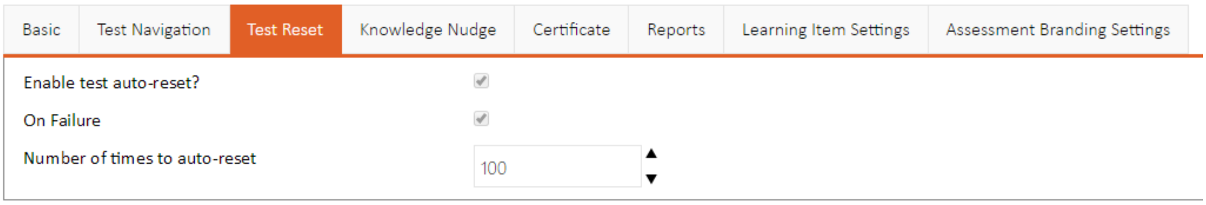


Figure 75: Automatic test reset

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

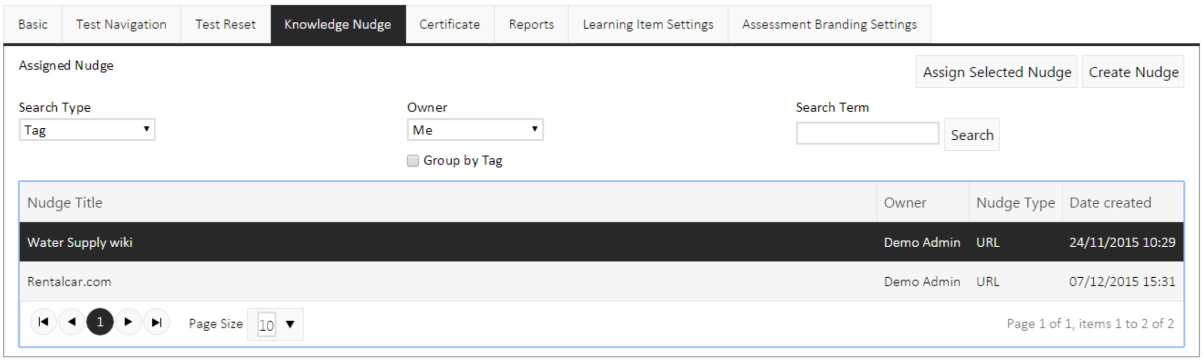


Figure 76: Associating a knowledge nudge URL or PDF

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

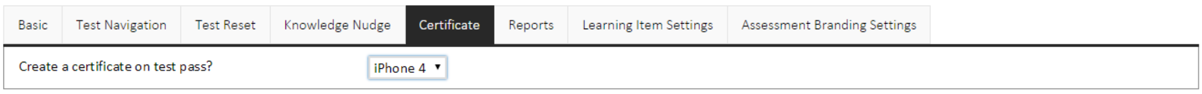


Figure 77: Associating a certificate with an assessment

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

12.1.9 Reports

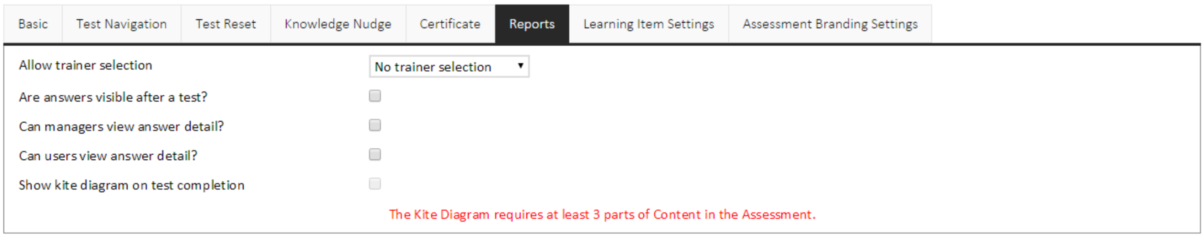


Figure 78: Viewing assessment results and additional options

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

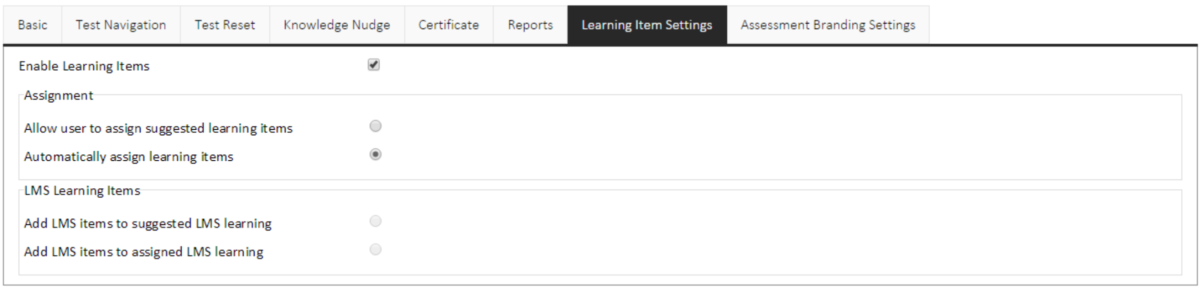


Figure 79: Assessment Learning Items settings

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

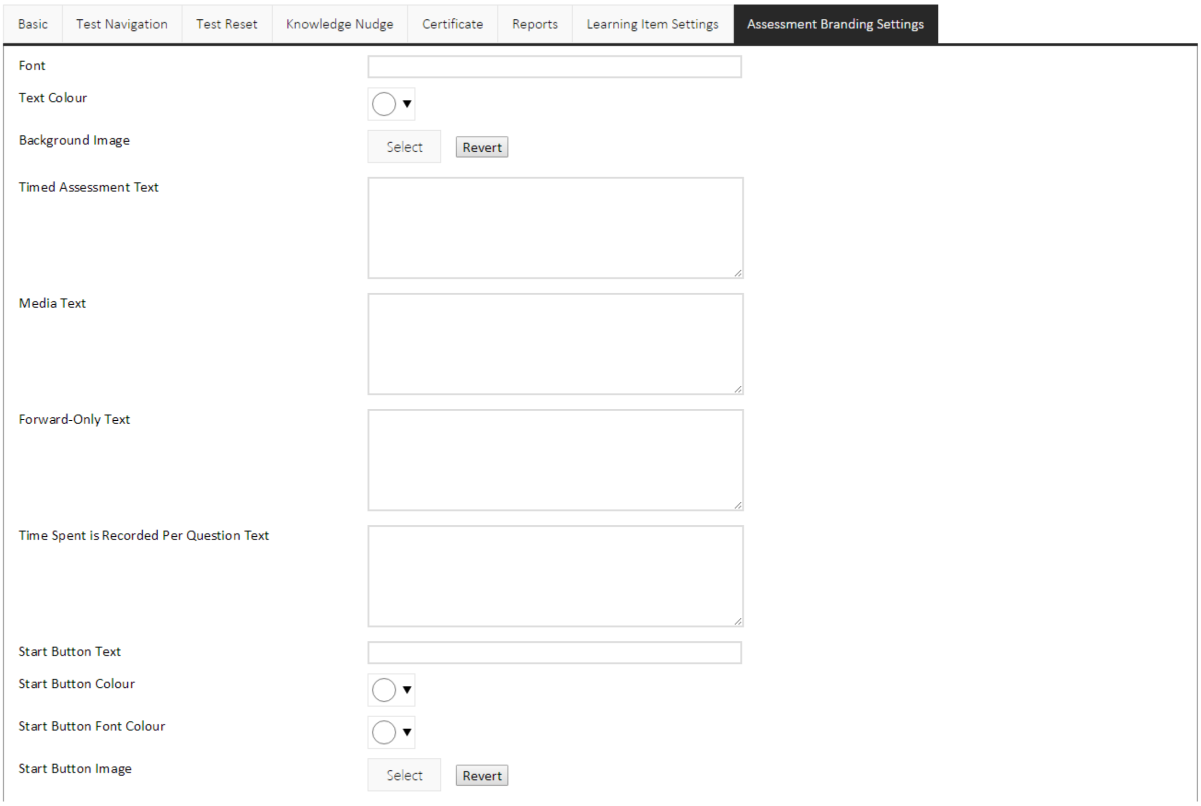


Figure 80: Assessment Branding Settings

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.

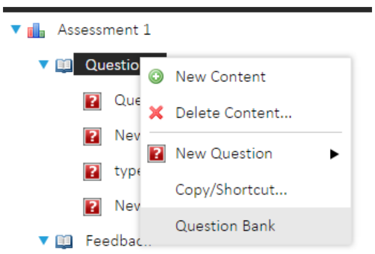
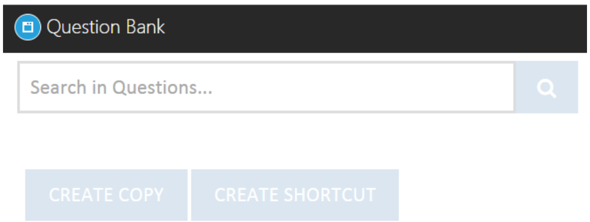


Figure 81: Question Bank



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 82: Search bar

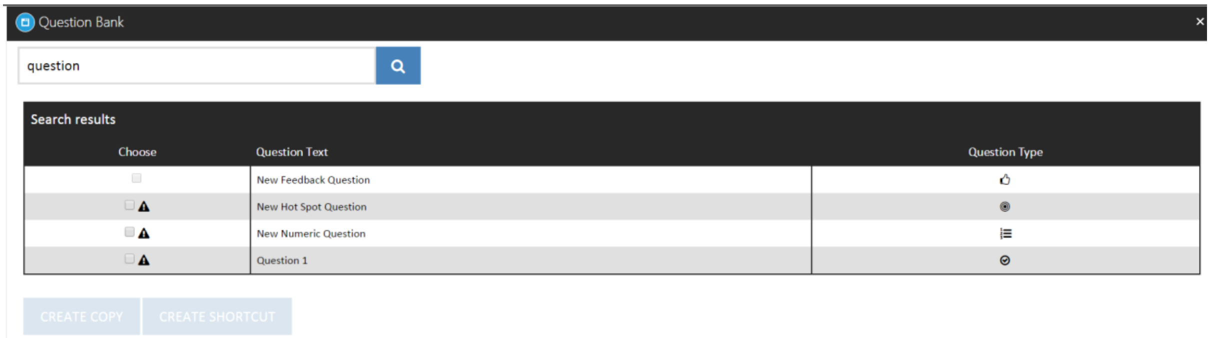


Figure 83: Search results

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.

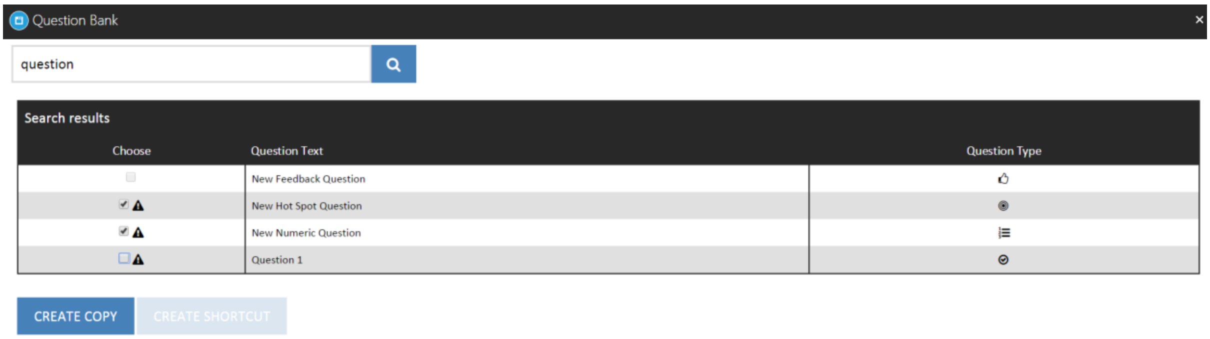


Figure 84: Selecting questions to copy/shortcut

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

Performance DNA 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:

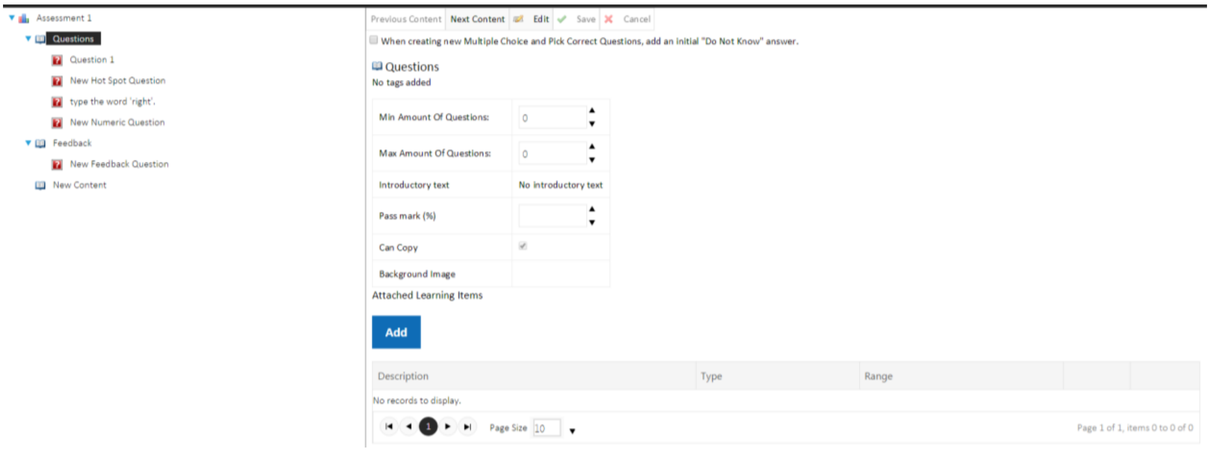


Figure 85: Attaching learning items to a content section

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

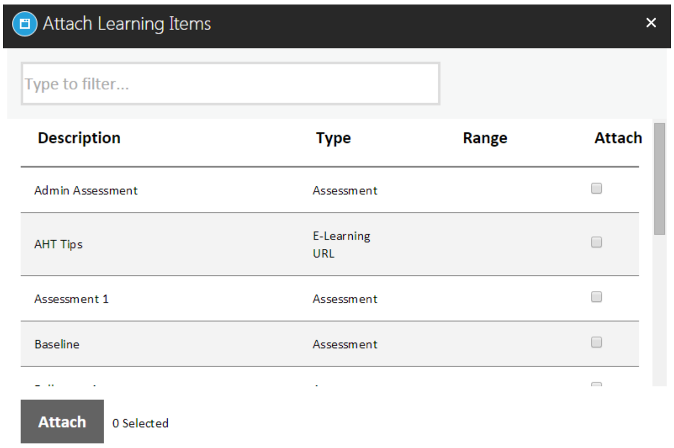


Figure 86: Searching for learning items

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 Performance DNA 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

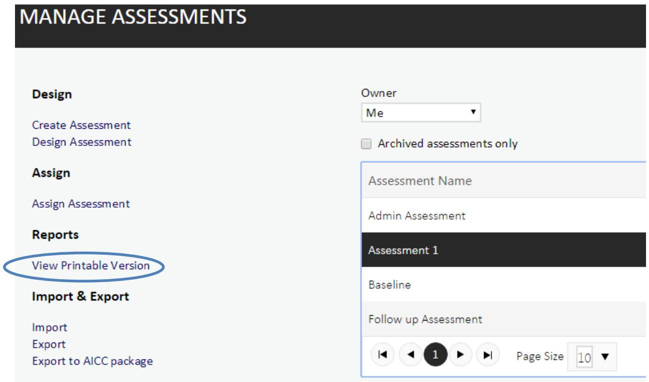


Figure 87: View Printable Version

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 Performance DNA users. The **Export to AICC package** creates an AICC course descriptor that can be used with Learning Management Systems.

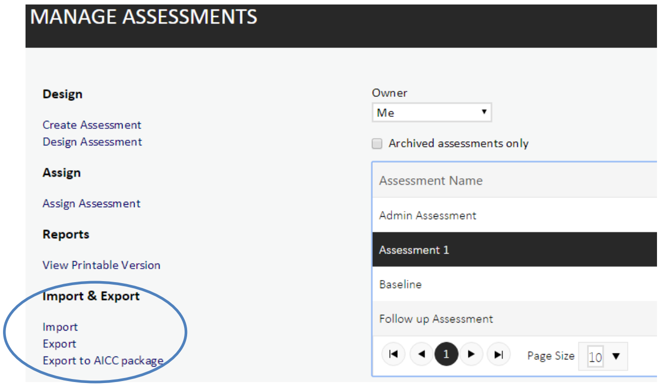


Figure 88: Import/Export options

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 Performance DNA can also detail the number of times that a user has accessed any Knowledge Nudges and the average and overall duration of each view.

Performance DNA 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 Performance DNA and separate licenses are required for these software applications**.

In order for Performance DNA 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.

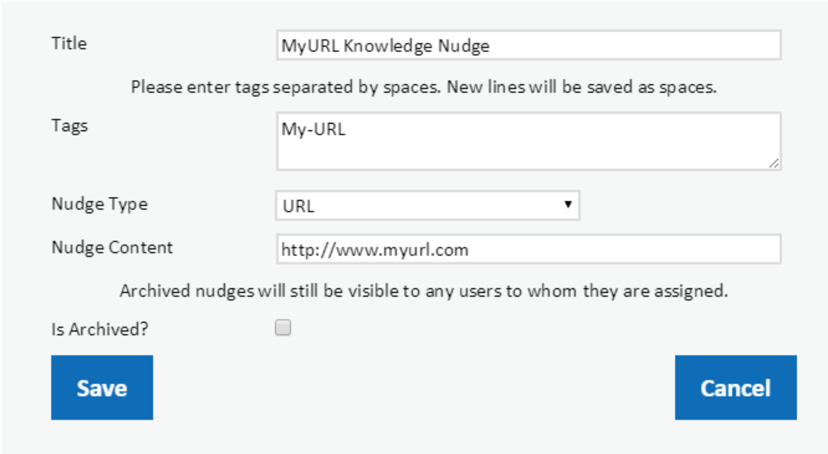


Figure 89: Creating a URL knowledge nudge

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

If you wish to upload a PDF to Performance DNA 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.

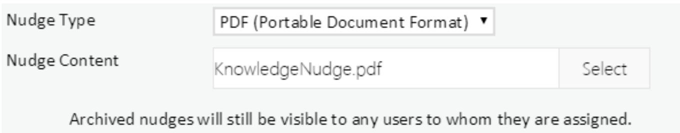


Figure 90: Creating a PDF knowledge nudge

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 Performance DNA 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.

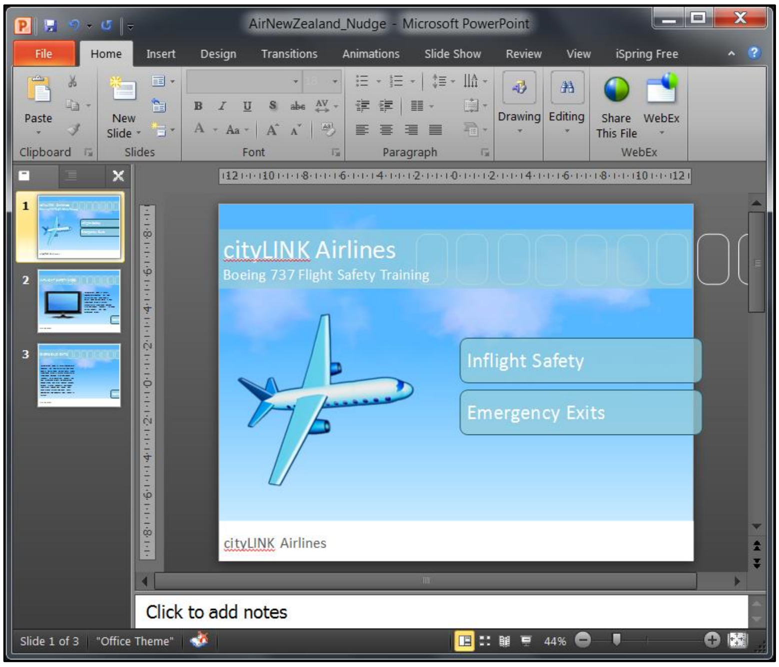


Figure 91: Using Microsoft PowerPoint or Adobe Acrobat to create multimedia nudges

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.

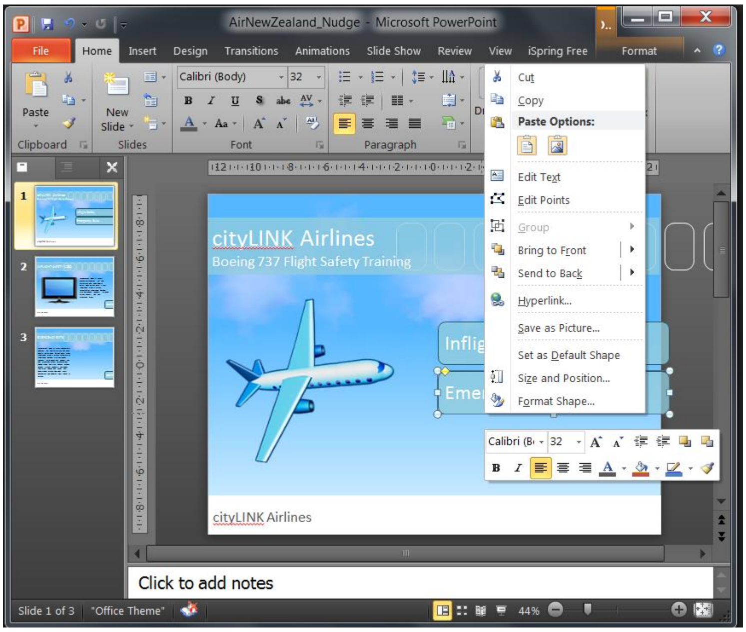


Figure 92: Setting presentation elements as hyperlinks

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.

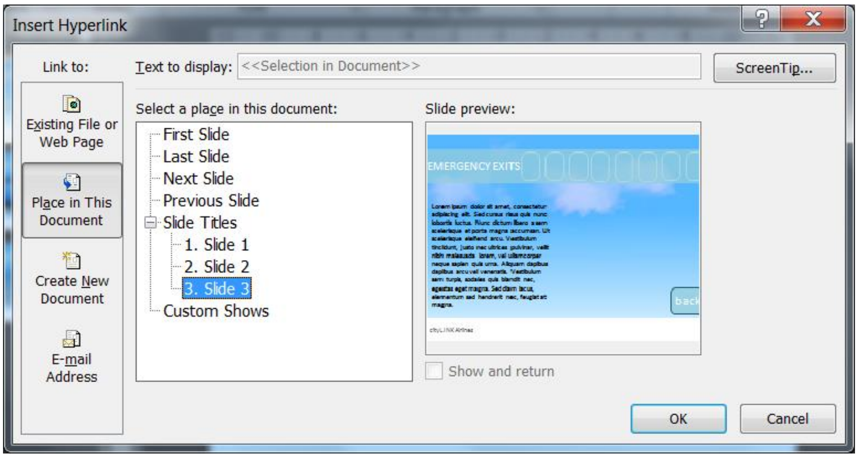


Figure 93: Setting hyperlink target

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.

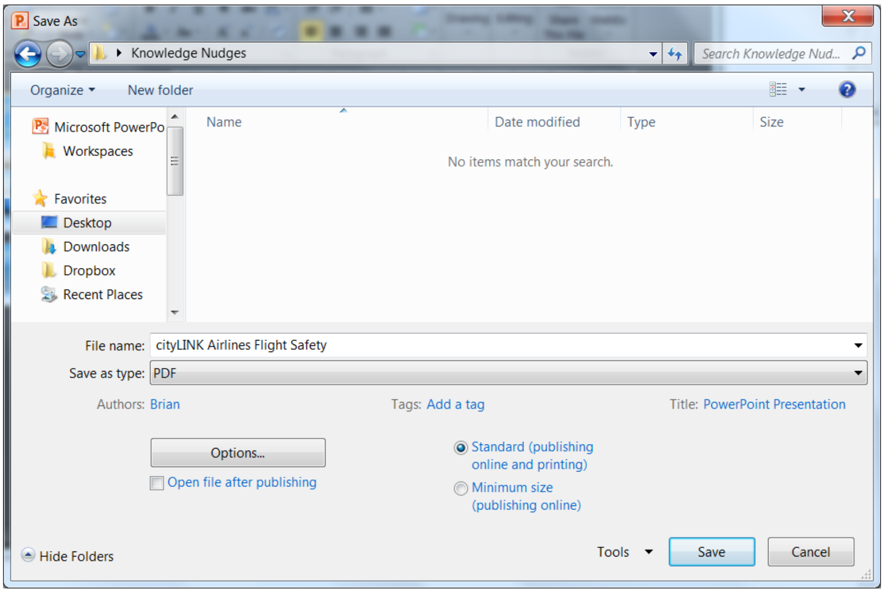


Figure 94: Saving PowerPoint presentations as PDF documents

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.

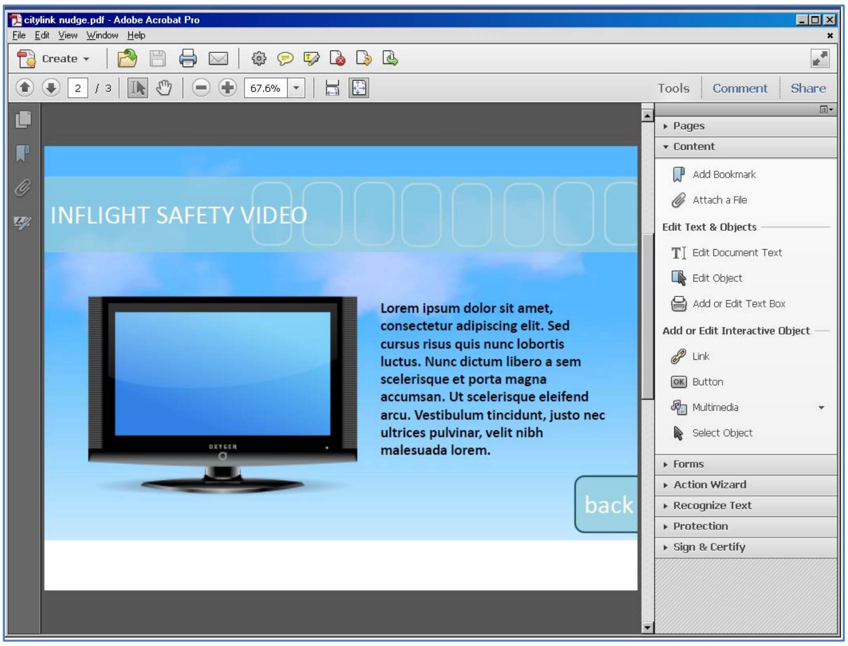


Figure 95: Adobe Acrobat multimedia content types

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.

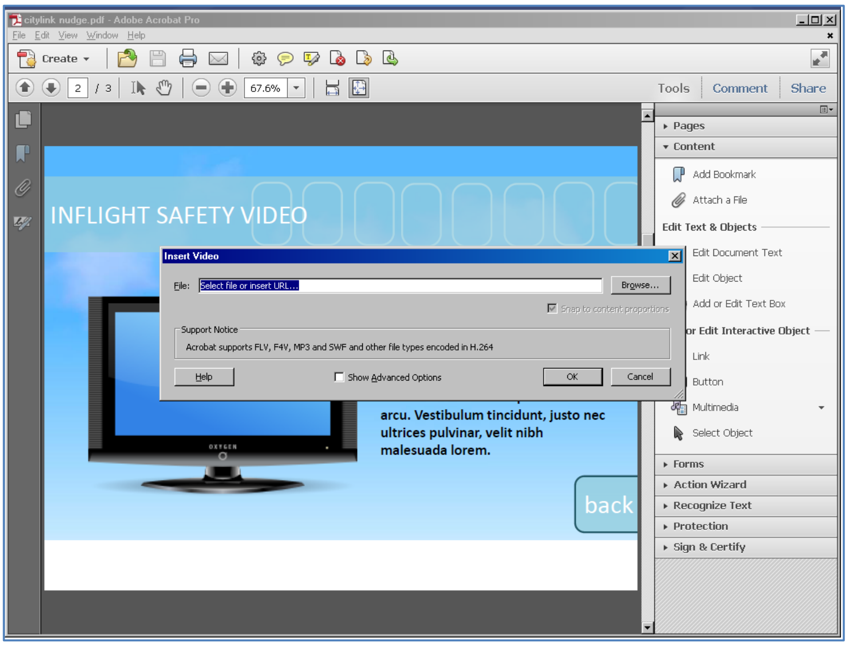


Figure 96: Inserting a video file into a PDF document

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.

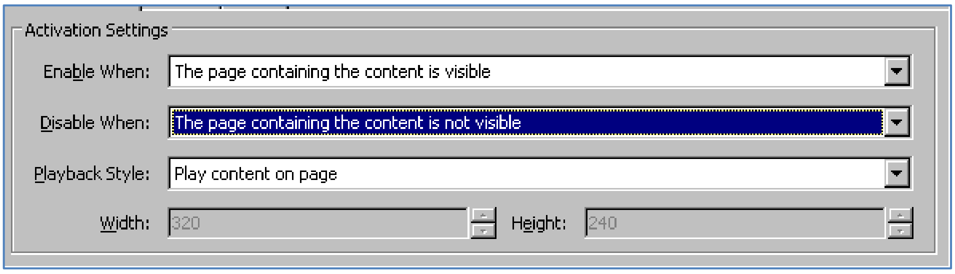


Figure 97: Multimedia advanced options

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 Performance DNA.

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

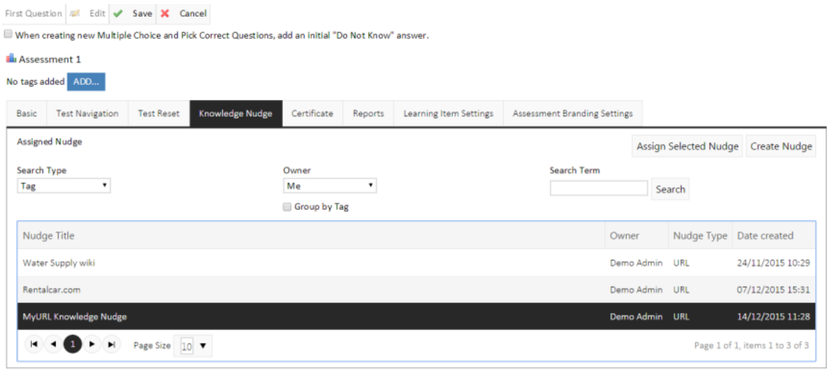


Figure 98: Selecting a knowledge nudge

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

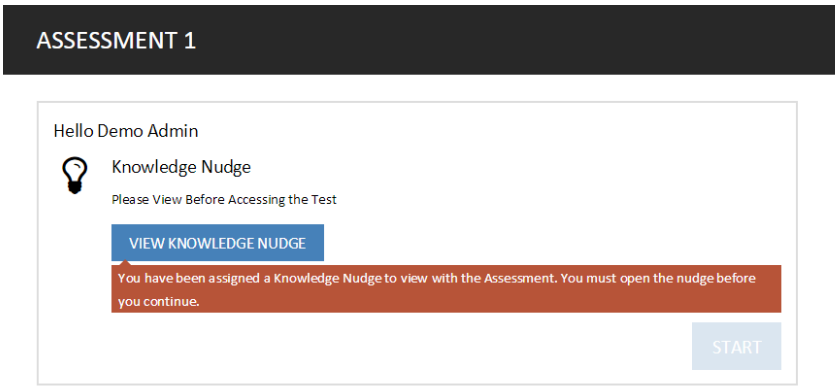


Figure 99: Mandatory pre-assessment attachment

14 Managing Learning Items

Performance DNA 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.

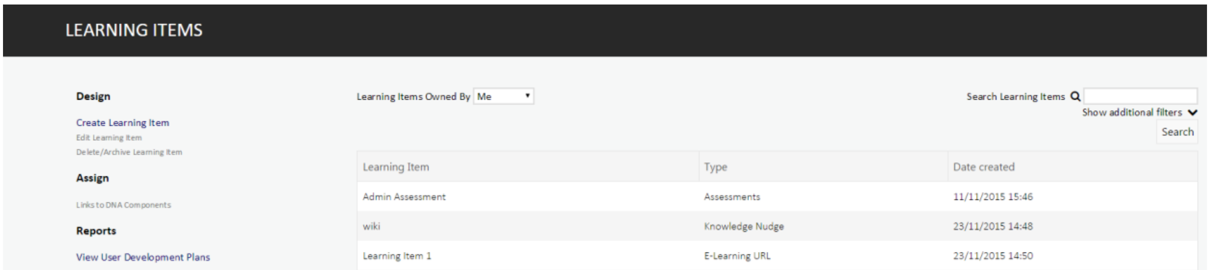
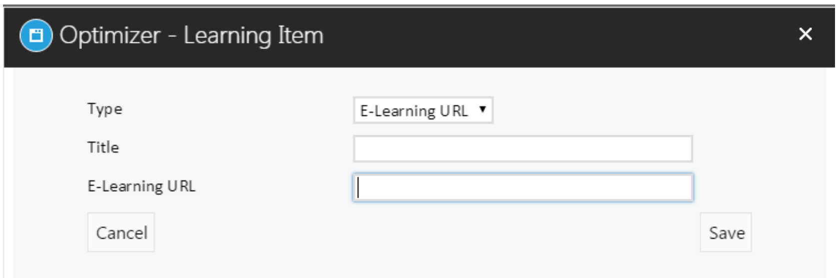


Figure 100: Learning Items Page

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



automatically created.

Figure 101: 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

Performance DNA 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 Genesys EWM Learning Item Integration

Performance DNA 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 Performance DNA 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.

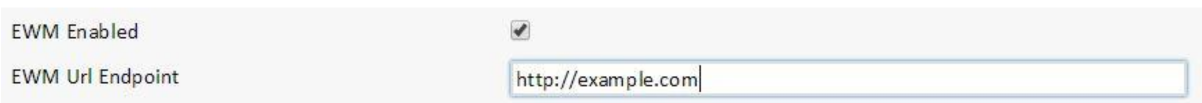


Figure 102: EWM Integration

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 Performance DNA when it is assigned.

Notes:

> This feature requires that Genesys employee IDs match Performance DNA 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.

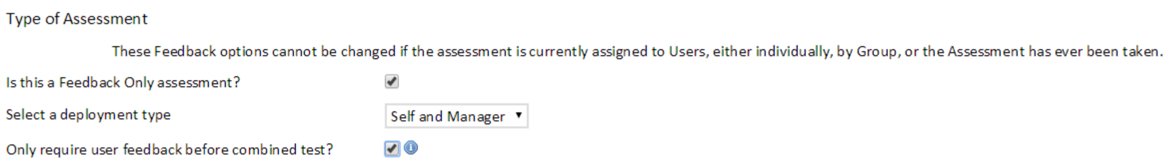


Figure 103: Self and manager feedback assessments

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.

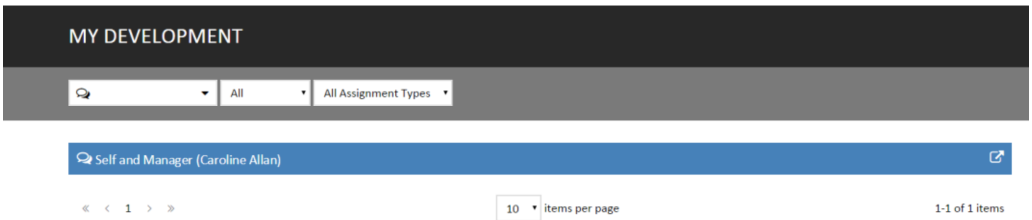


Figure 104: Viewing assessments using the 'feedback on other users' tab

16 Email Notification Service

It is possible to set Performance DNA to automatically send an email notification to managers when their subordinates have completed an Assessment. This optional feature is enabled via the **Systems Settings** menu.

16.1 Configuring Email Settings

From the **Systems** menu select **Systems Settings** and the **General Settings** tab.

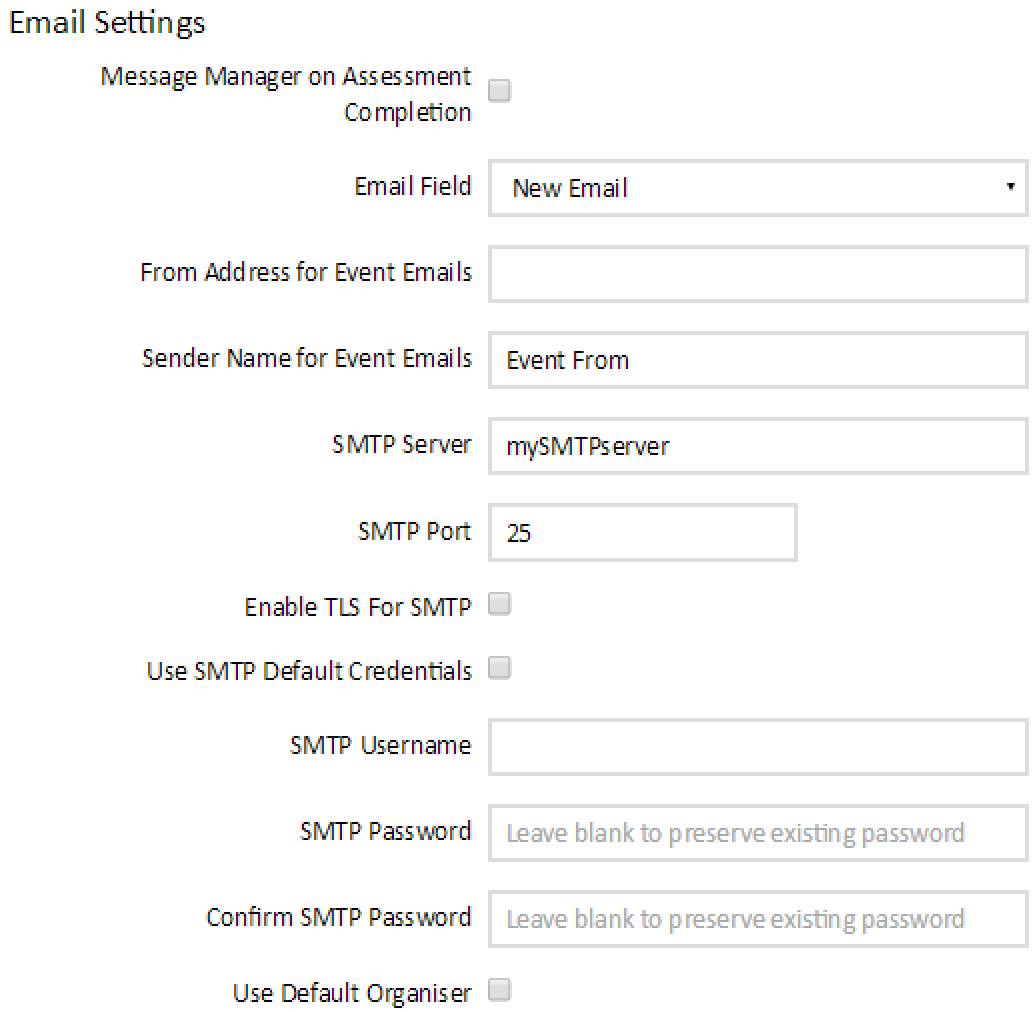


Figure 105: Viewing Email Settings

Message Manager on Assessment Completion – Check to enable sending Assessment completion emails to the users Manager.

Email Field – From the dropdown box select the User Field that is used to store the email address. This will be used as the recipient's email address.

From Address for the Event Emails – this is the default sender address that will be used when creating email notifications. This would typically be a team or department inbox.

Sender Name for Event Emails – This is the default senders name, typically this would be the Team / Department name of the business area responsible for assigning learning.

SMTP Server – the name / IP address of the outgoing mail server that will be used to send out the notification emails.

SMTP Port –the port assigned to SMPT traffic on the email server.

Enable TLS For SMPT – this should be selected if an encrypted / secure connection to the email server is being used.

Use SMTP Default Credentials – this should be checked if the email server doesn't require specific account details for sending emails. If unchecked the following additional settings are required:

SMTP Username – Username for the account being used for sending email notifications.

SMTP Password – SMTP account password.

Use Default Organiser – When selected all email notifications will be sent from the configured **From Address for the Event Emails** and **Sender Name for Event Emails**. When unselected emails will be sent using the user details of the person organising the training / **Assessment**

16.1.1 Enabling Email Events

After configuring the email settings email notifications can be enabled using the **Event Settings** tab.

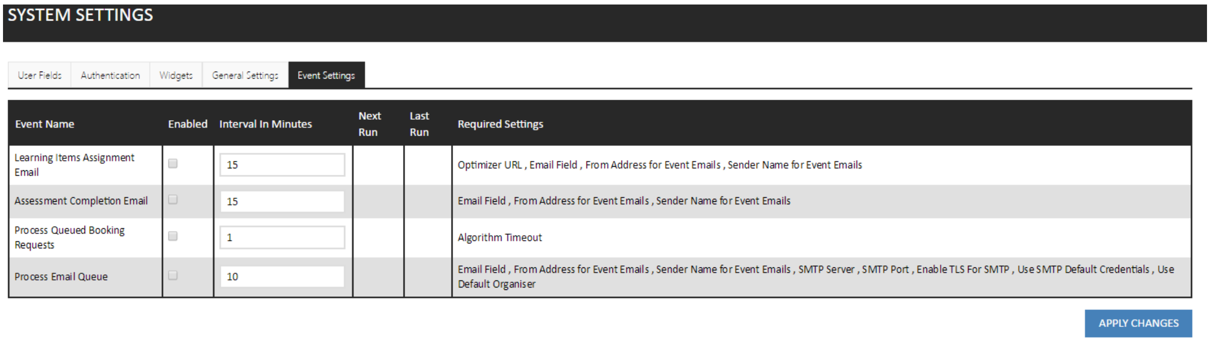


Figure 106: Event Settings

From the **Event Settings** tab check the **Enable** box for each of the different email notifications that you wish to use and set the **Interval in Minutes** column to the frequency that you want emails sending.

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**.

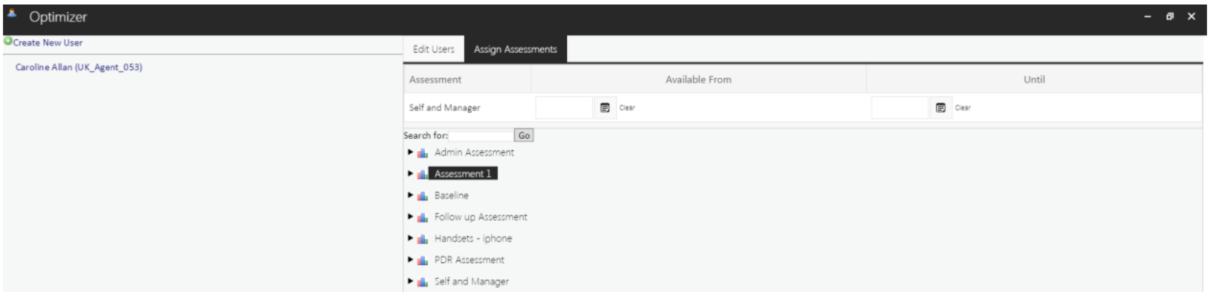


Figure 107: Assigning assessments to individual users

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**.

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

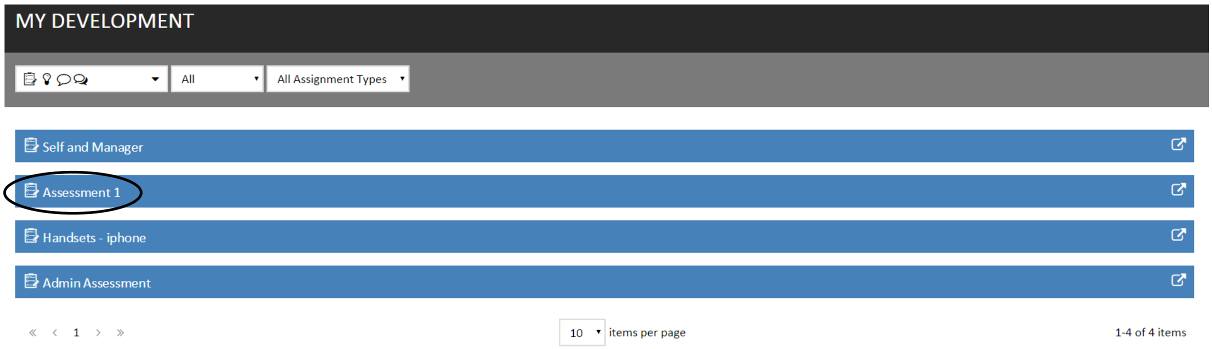


Figure 108: Viewing individually assigned assessments

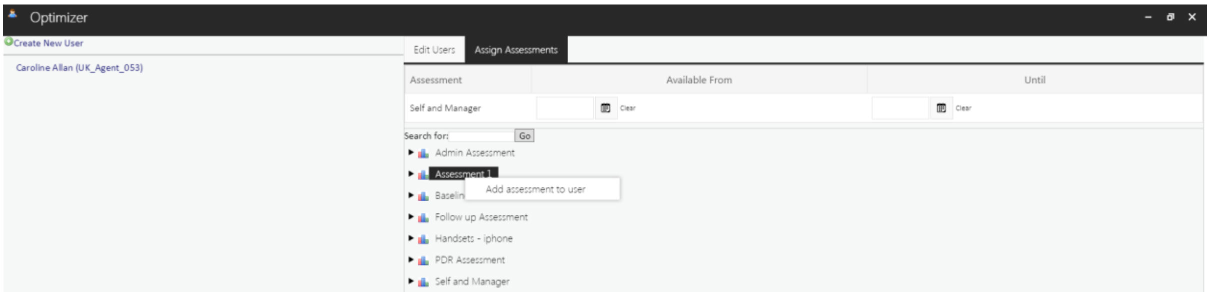


Figure 109: Assigning assessments to individual users

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).

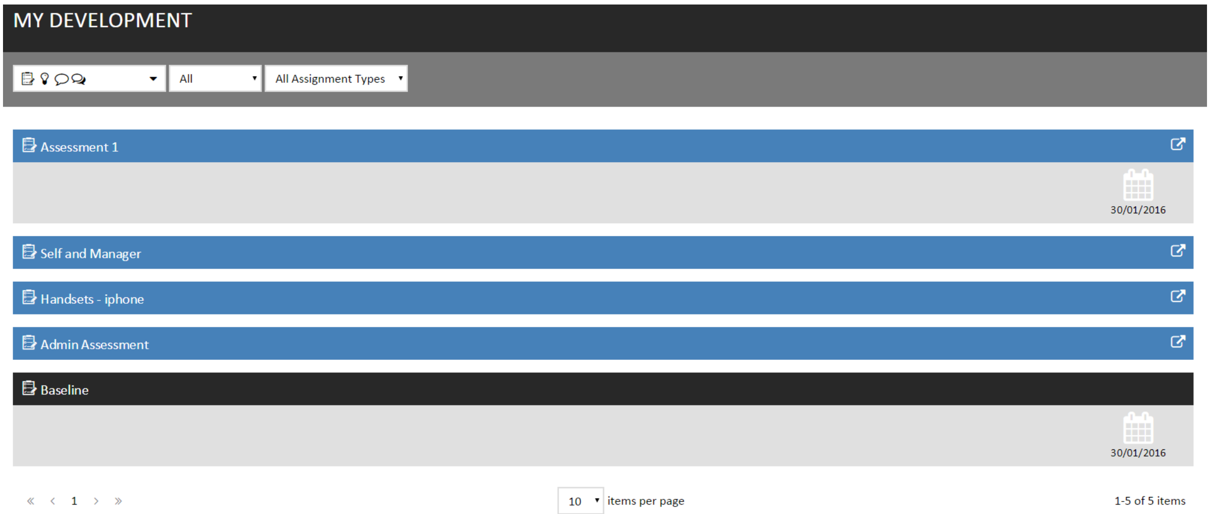


Figure 110: Deadline assessment dates

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).

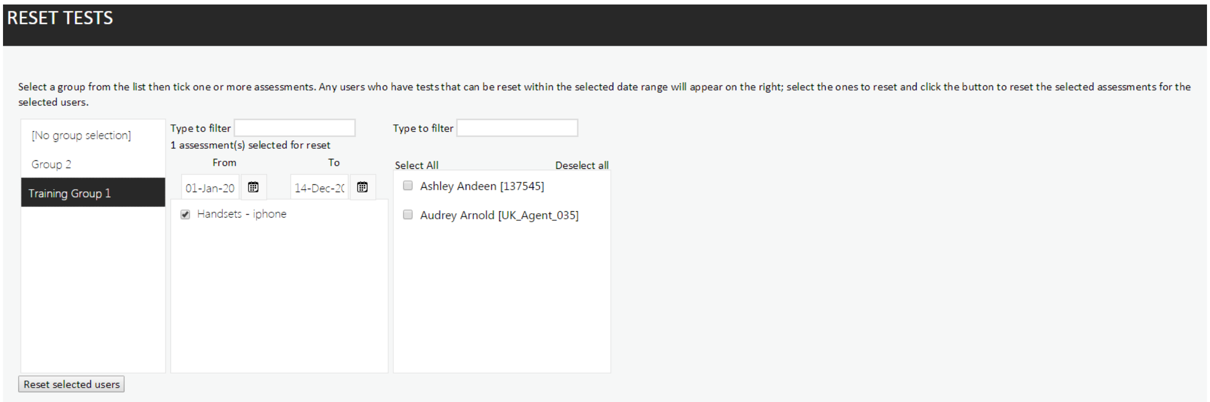


Figure 111: Resetting user assessments

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:

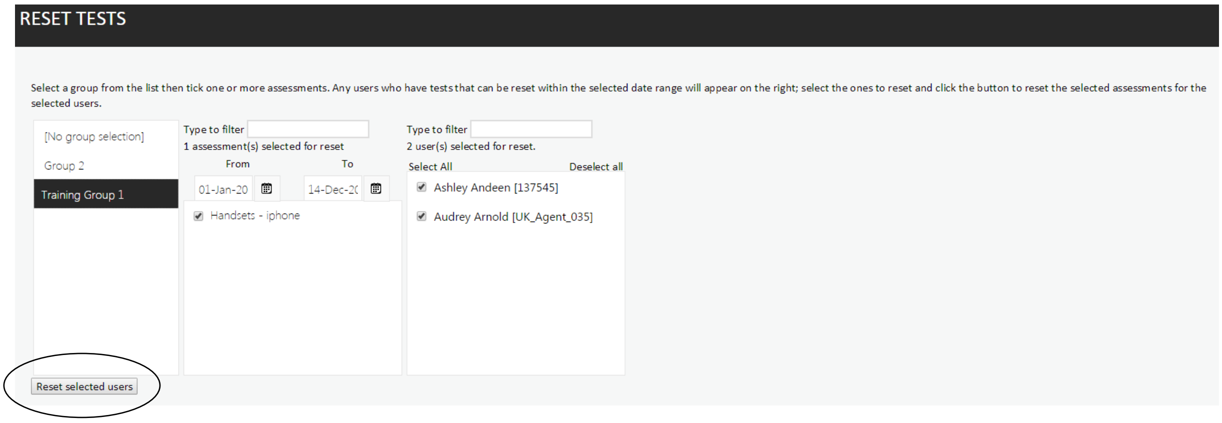


Figure 112: Resetting assessments for specific users

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.

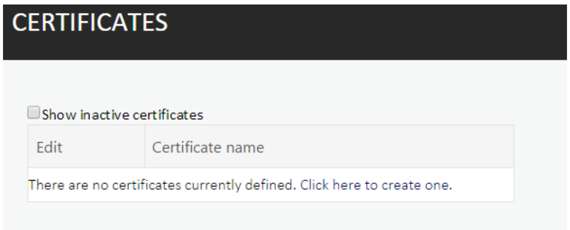


Figure 113: Creating new certificates

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.

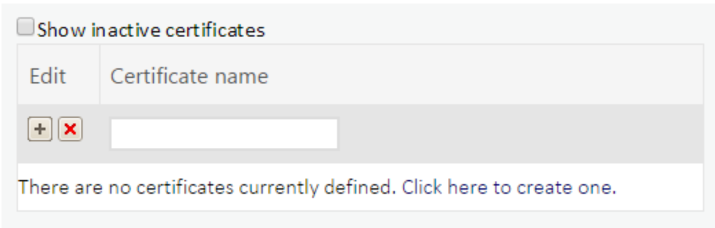


Figure 114: Setting certificate name

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

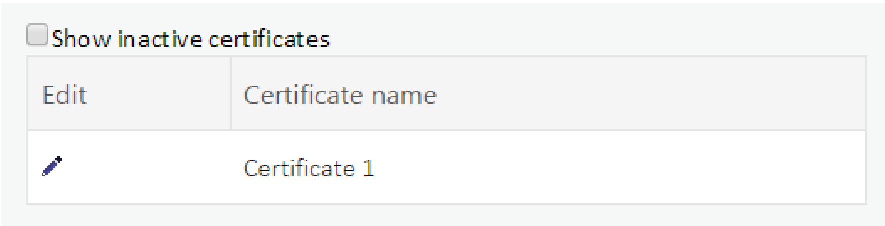
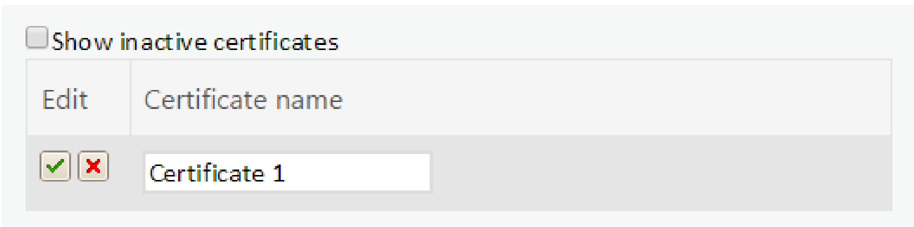


Figure 115: Saving certificate name

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



Certificate name.

Figure 116: 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.

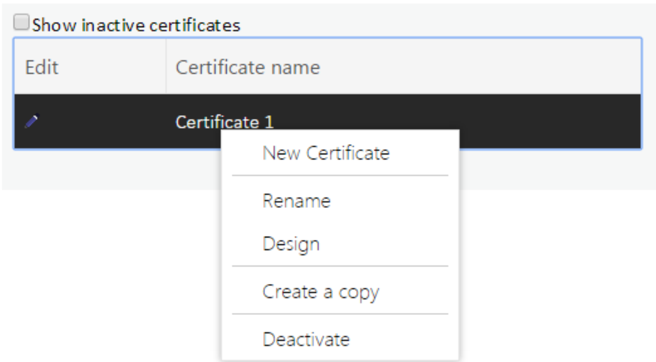


Figure 117: Designing certificate content

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

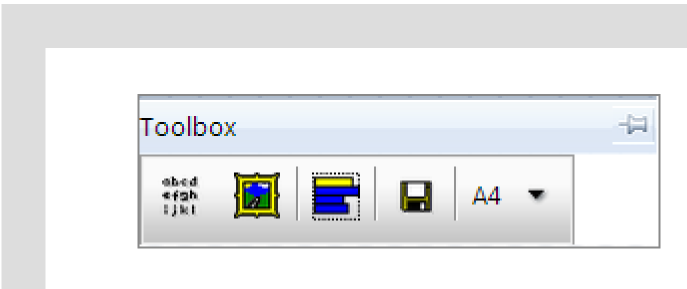


Figure 118: Designing certificate content

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 119: 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.

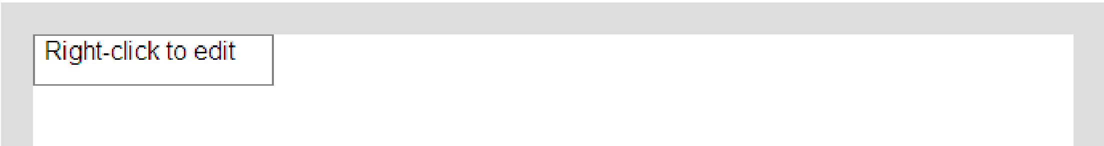


Figure 120: Adding text to a certificate

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

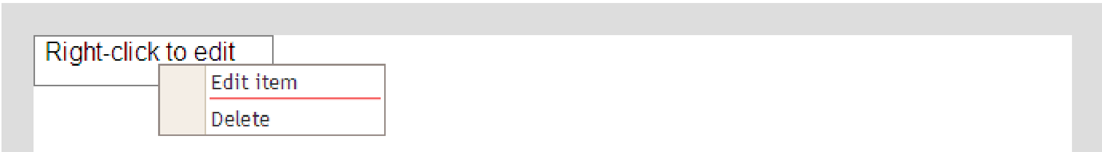


Figure 121: Text editing menu

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

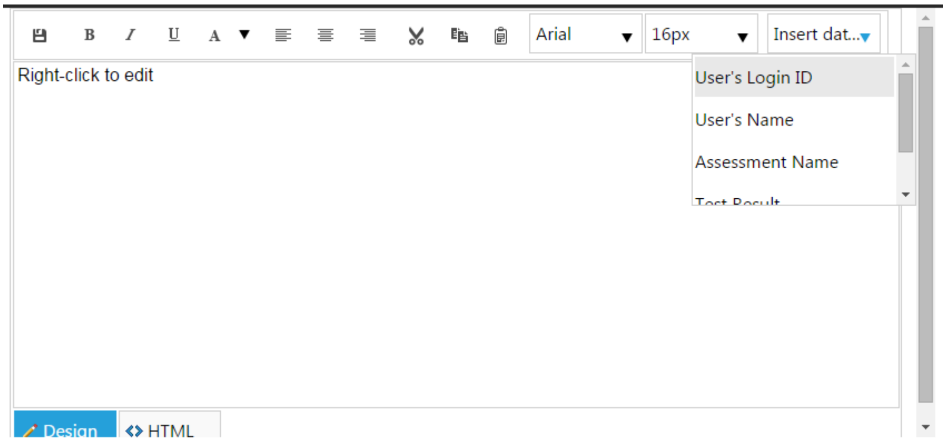


Figure 122: Editing certificate text

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 123: 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.

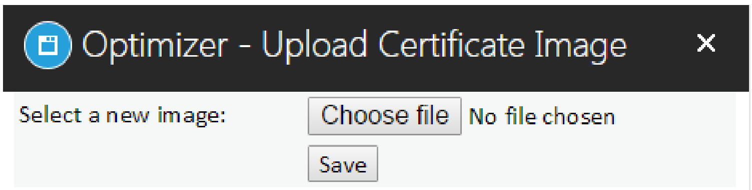
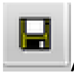
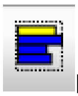


Figure 124: Browsing for replacement images

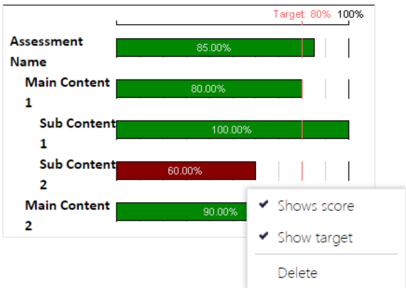
Once you have selected your image click **Save** and the certificate will be updated with the chosen image.

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 125: 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.

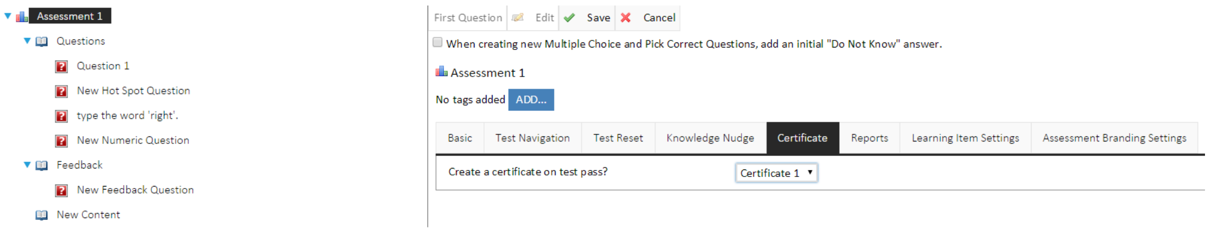


Figure 126: Assigning a certificate to an assessment

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.

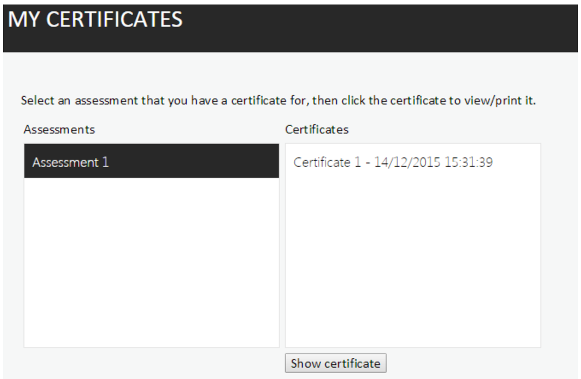


Figure 127: Viewing certificates

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).

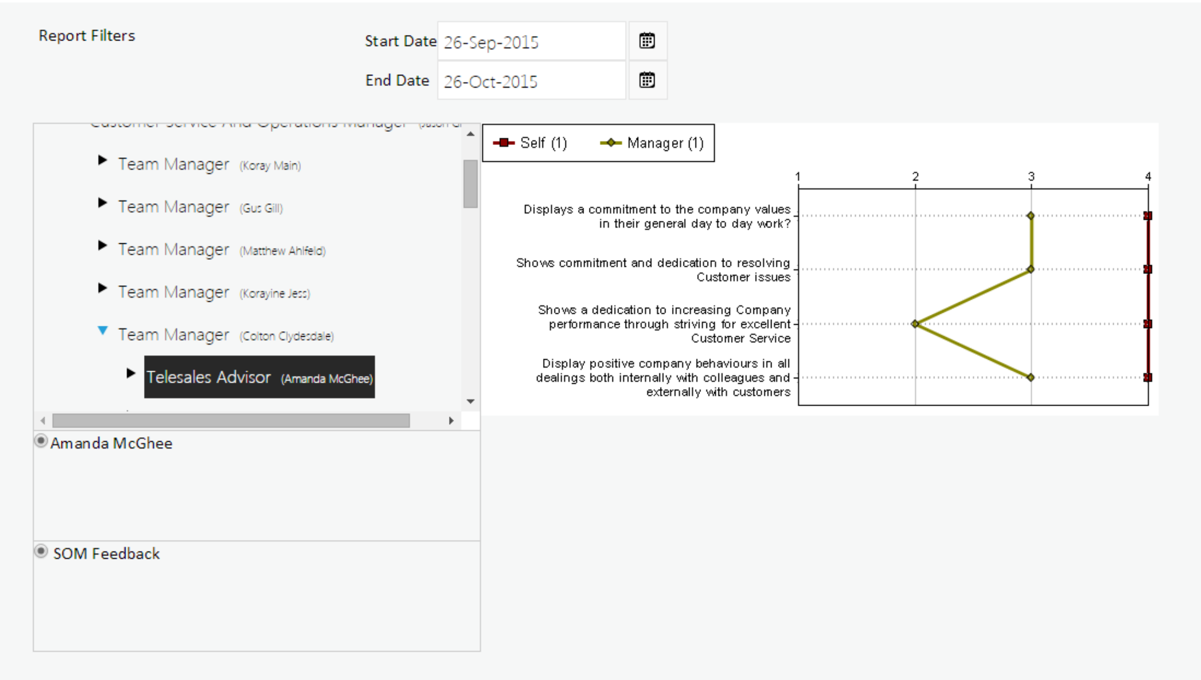


Figure 128: Feedback results report

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.

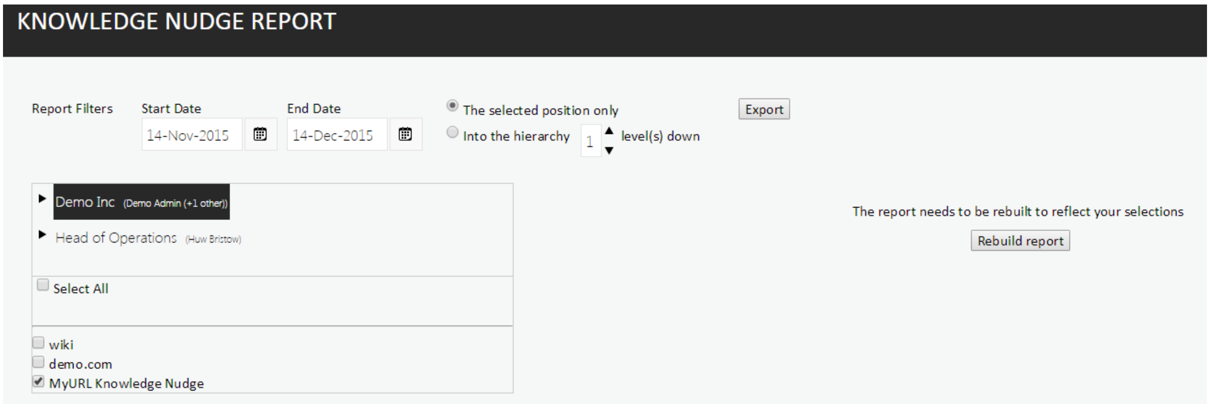


Figure 129: Knowledge nudge report

Click on **Rebuild Report**.

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

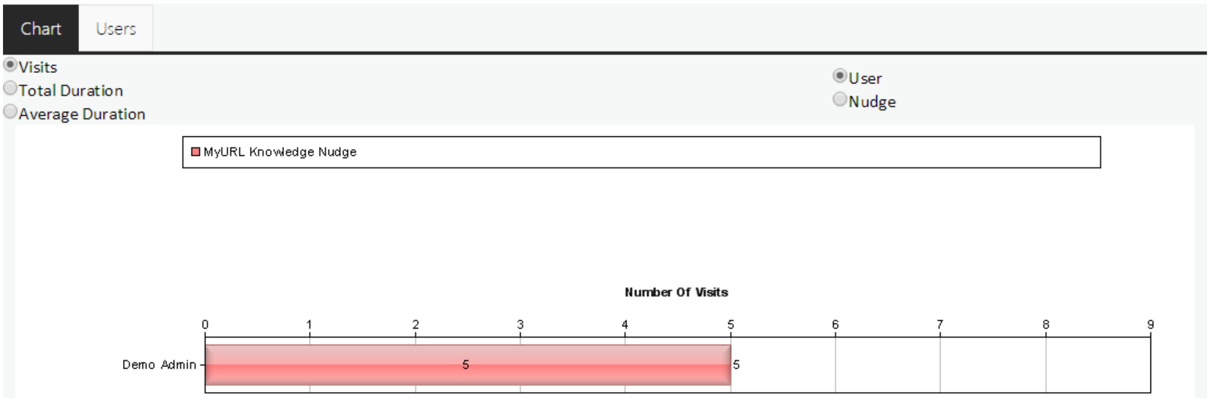


Figure 130: Nudge report information and options

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.

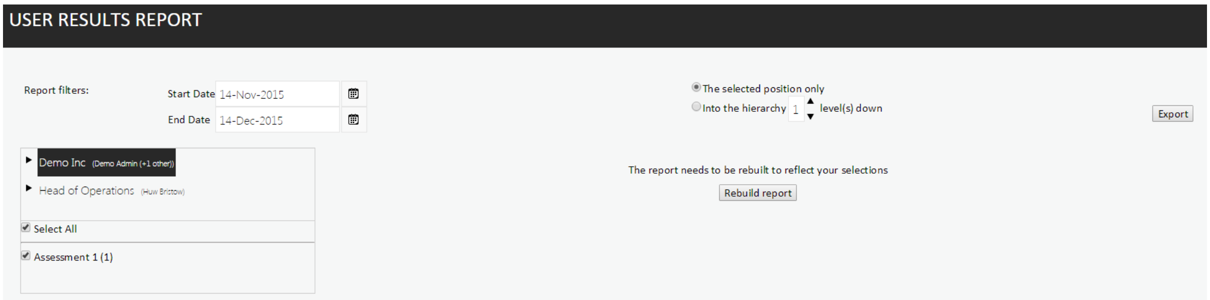


Figure 131: Viewing assessment reports by individual or team

- 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.

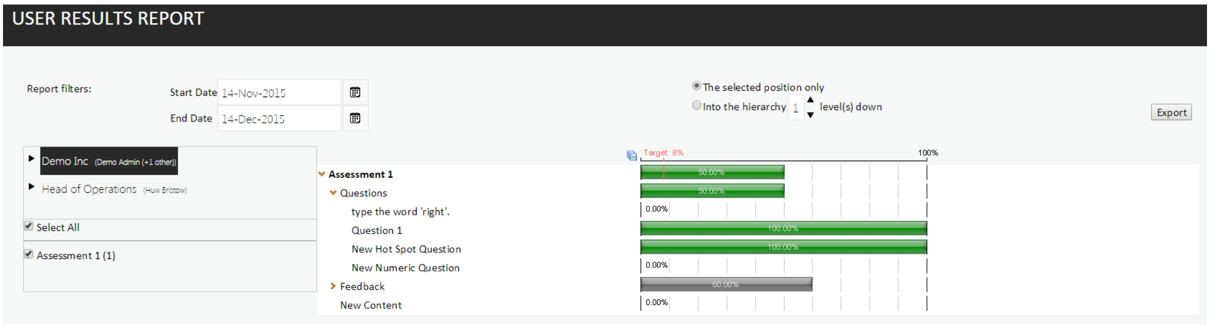


Figure 132: Detailed assessment results

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.

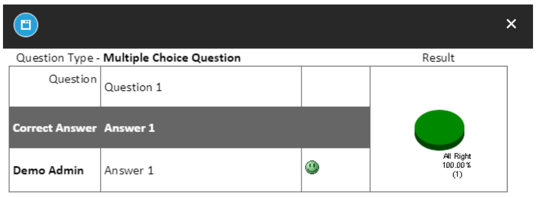


Figure 133: Viewing question detail and provided answers

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

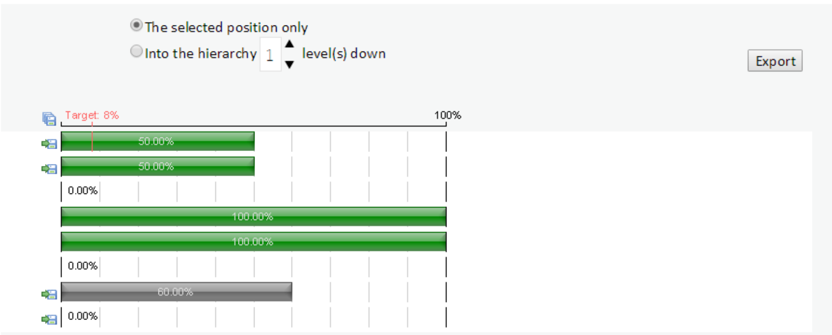


Figure 134: Exporting assessment details

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**.

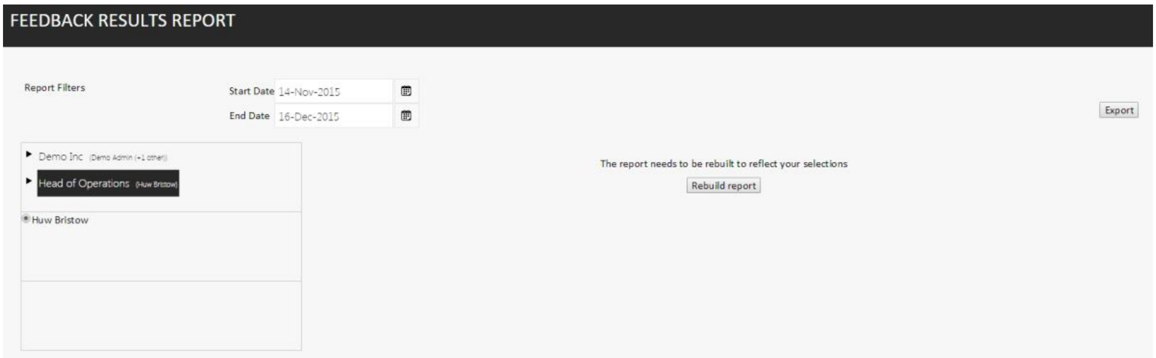


Figure 135: Rebuilding feedback reports

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.

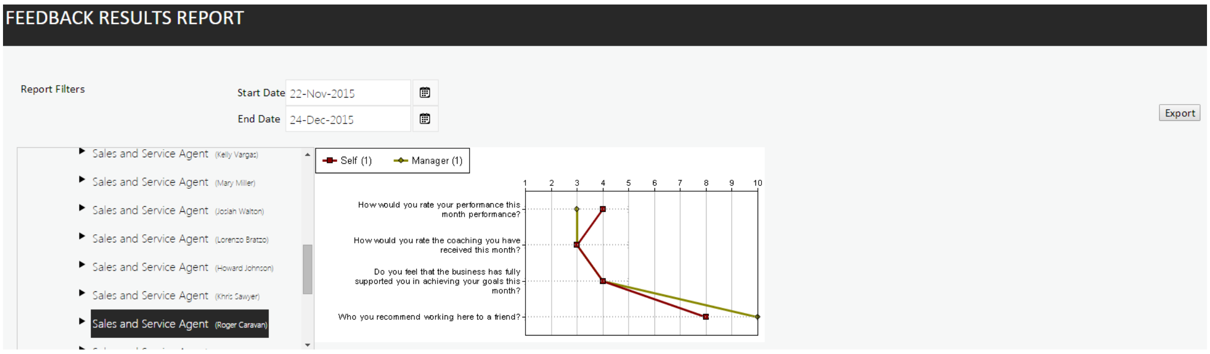


Figure 136: Feedback Results

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**.

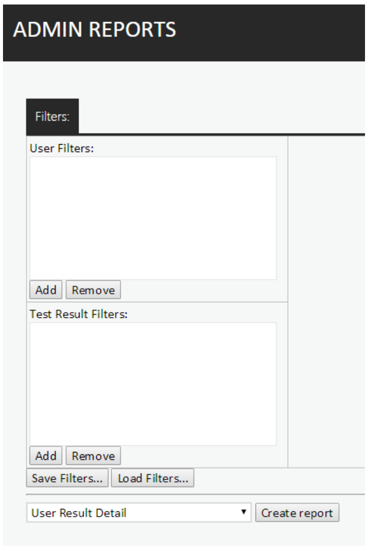


Figure 137: User result detail report

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

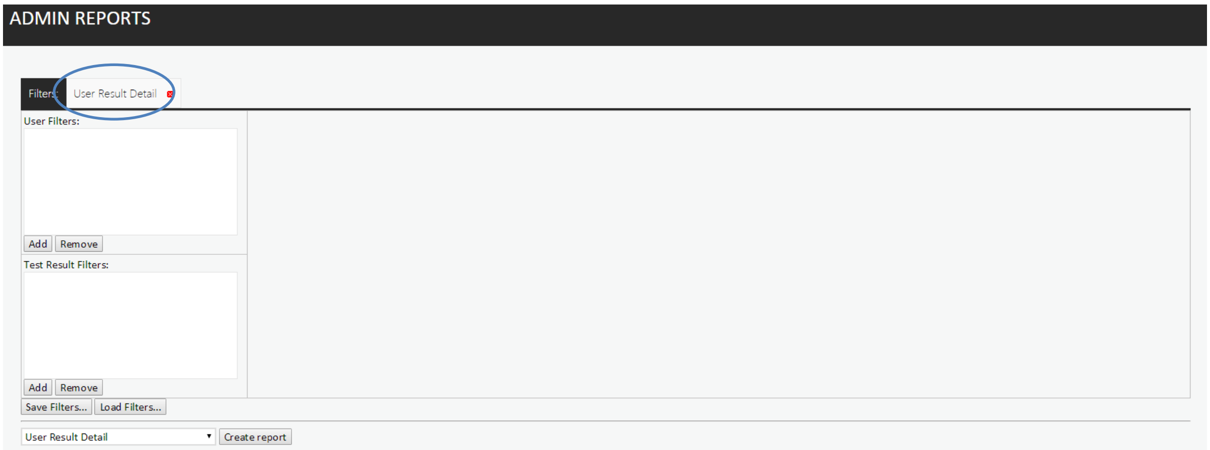


Figure 138: User result detail report

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

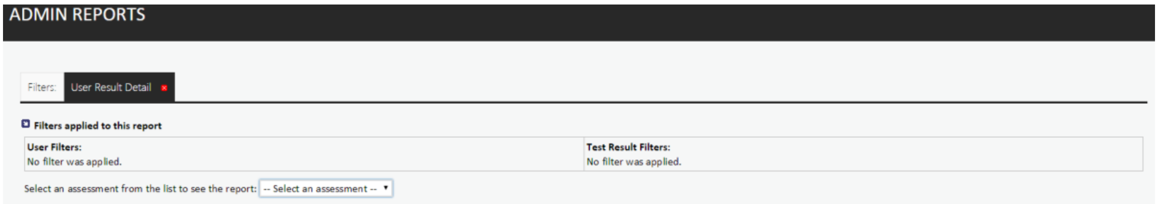
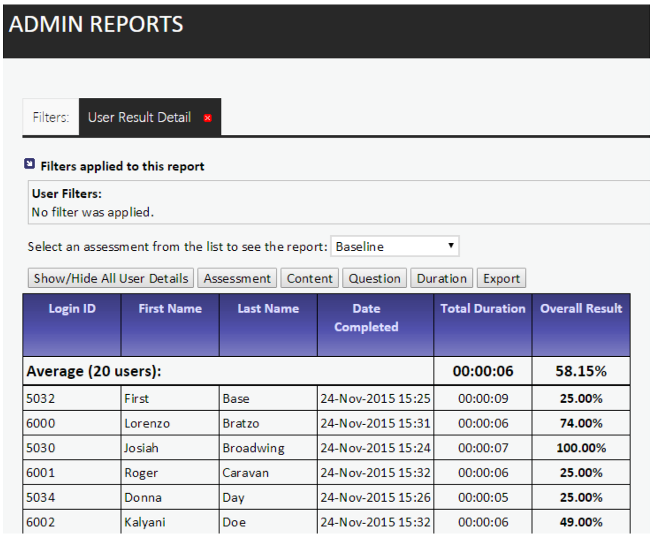


Figure 139: Selecting an assessment for the report

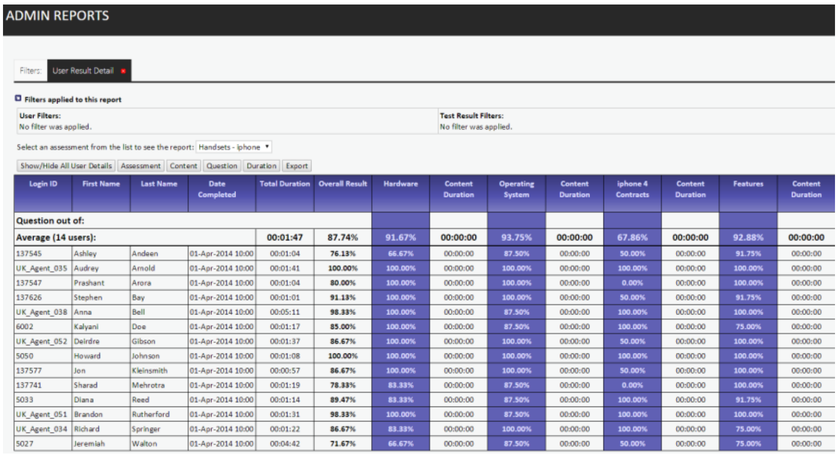
The data can then be expanded to Content and Question level with the option to Export into Excel. Click on the relevant buttons to expand the data.



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 140: 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 141: 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**.

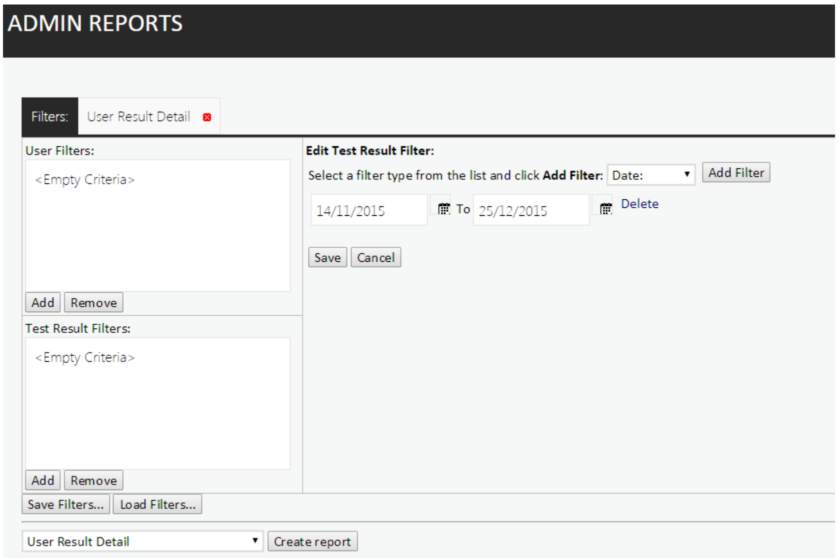


Figure 142: Using report filters

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

Select the additional filter.

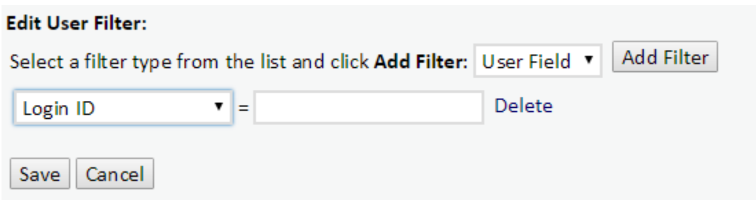


Figure 143: Adding additional filters

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.

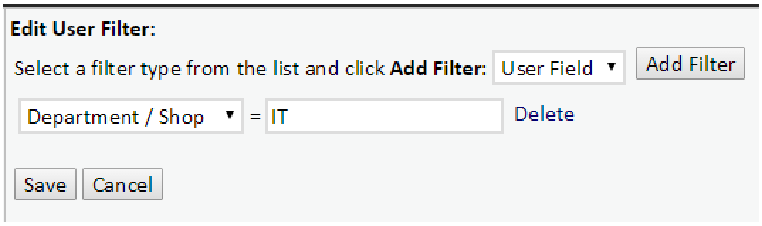


Figure 144: Adding a Department Filter

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.

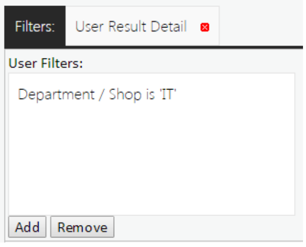


Figure 145: Saving filter options

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

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

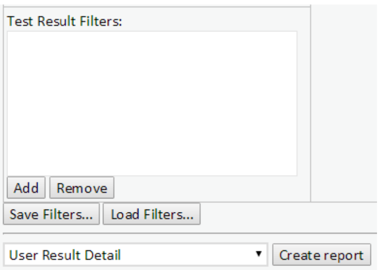


Figure 146: adding test result filters

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

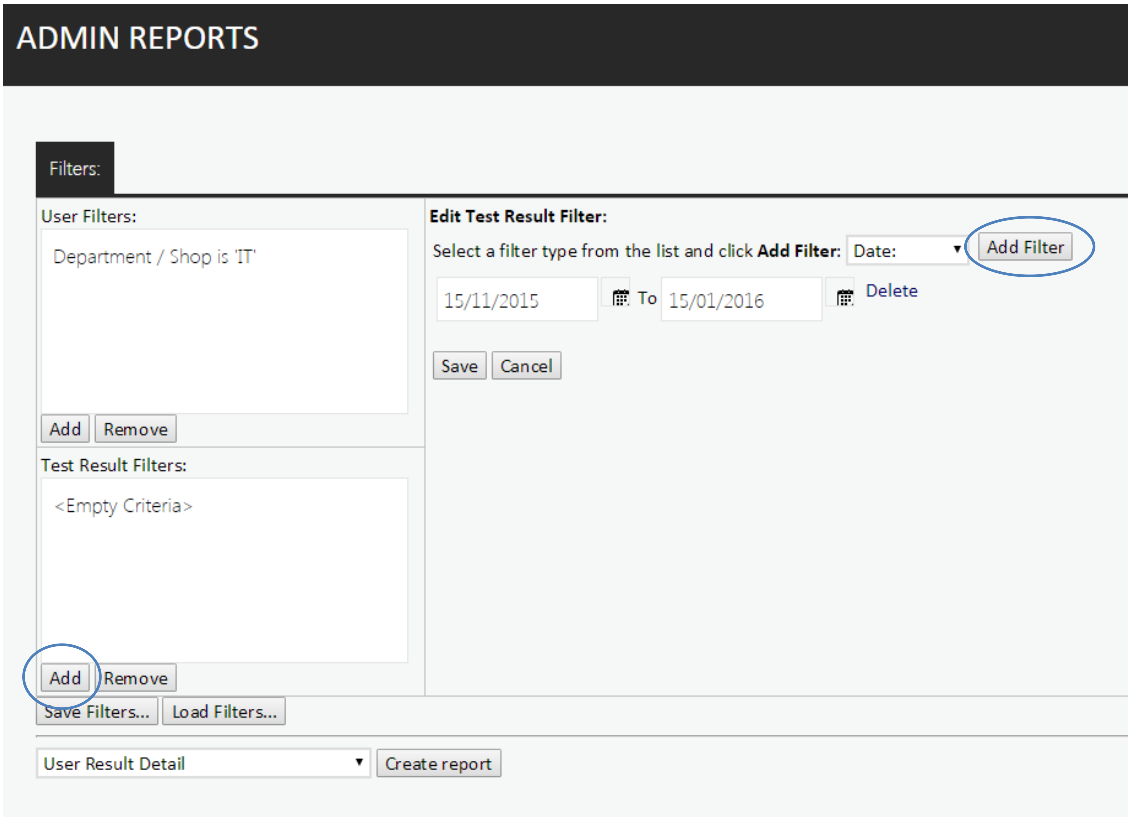


Figure 147: Selecting a test result filter

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

Test Result filter as per the example below.

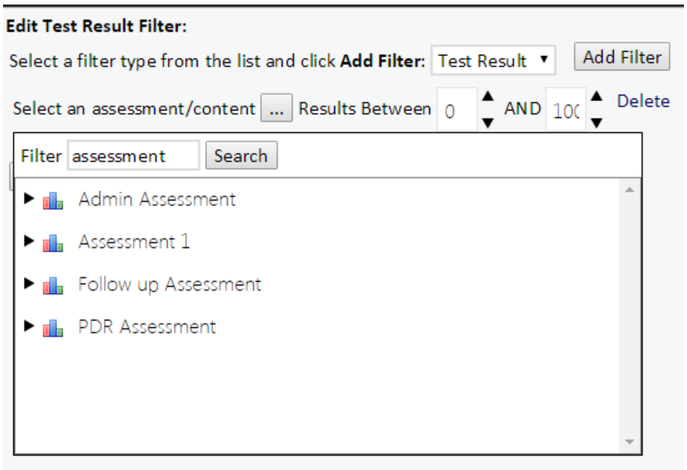


Figure 148: Test result filter options

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.

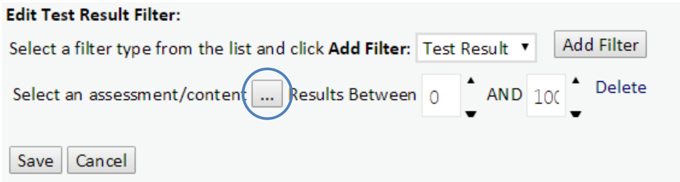


Figure 149: Saving an assessment with an associated filter

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.

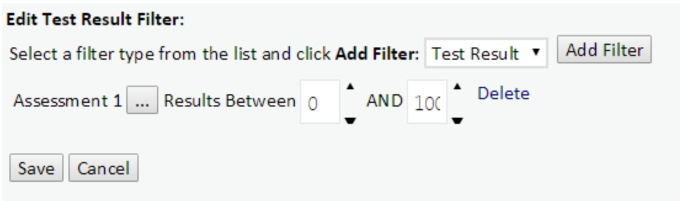


Figure 150: Saving an assessment with an associated filter

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

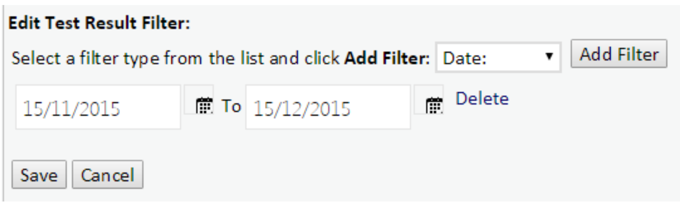


Figure 151: Saving the date filter

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

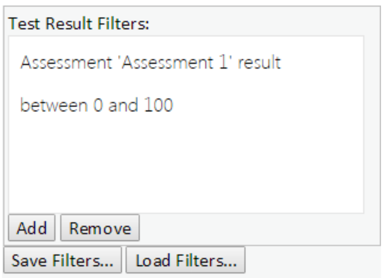


Figure 152: Display of a saved filter

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

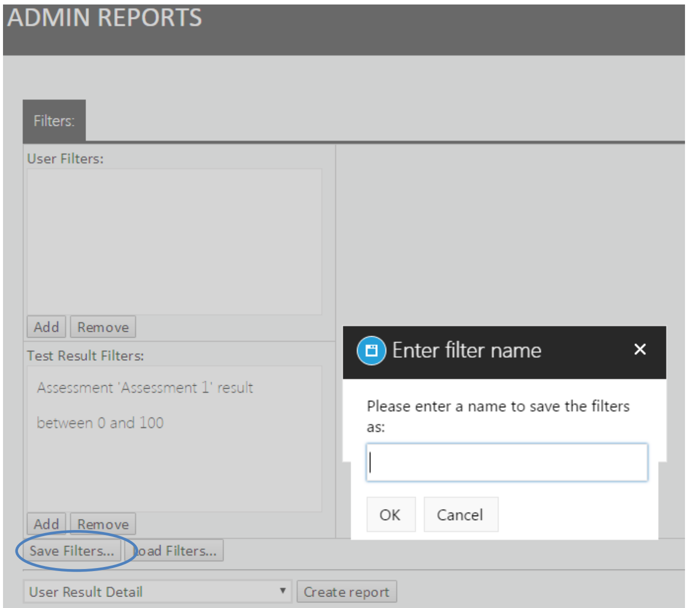


Figure 153: Saving filters

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

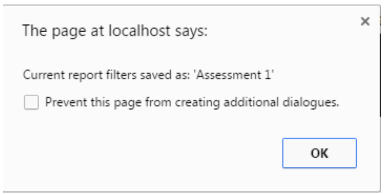


Figure 154: Filter update notification

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**.

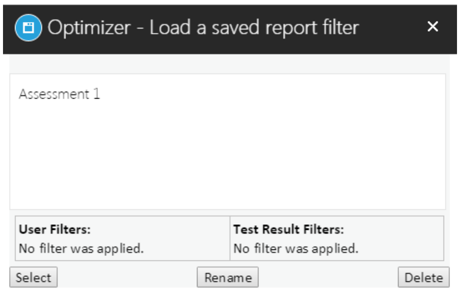


Figure 155: Loading saved filters

The filter then appears in the relevant filter box.

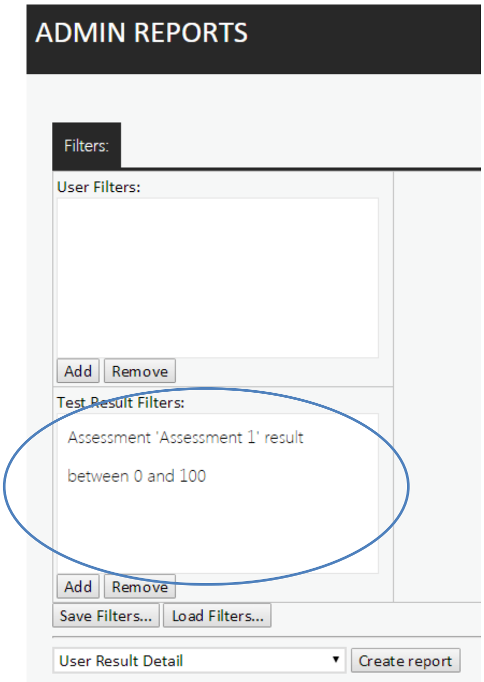
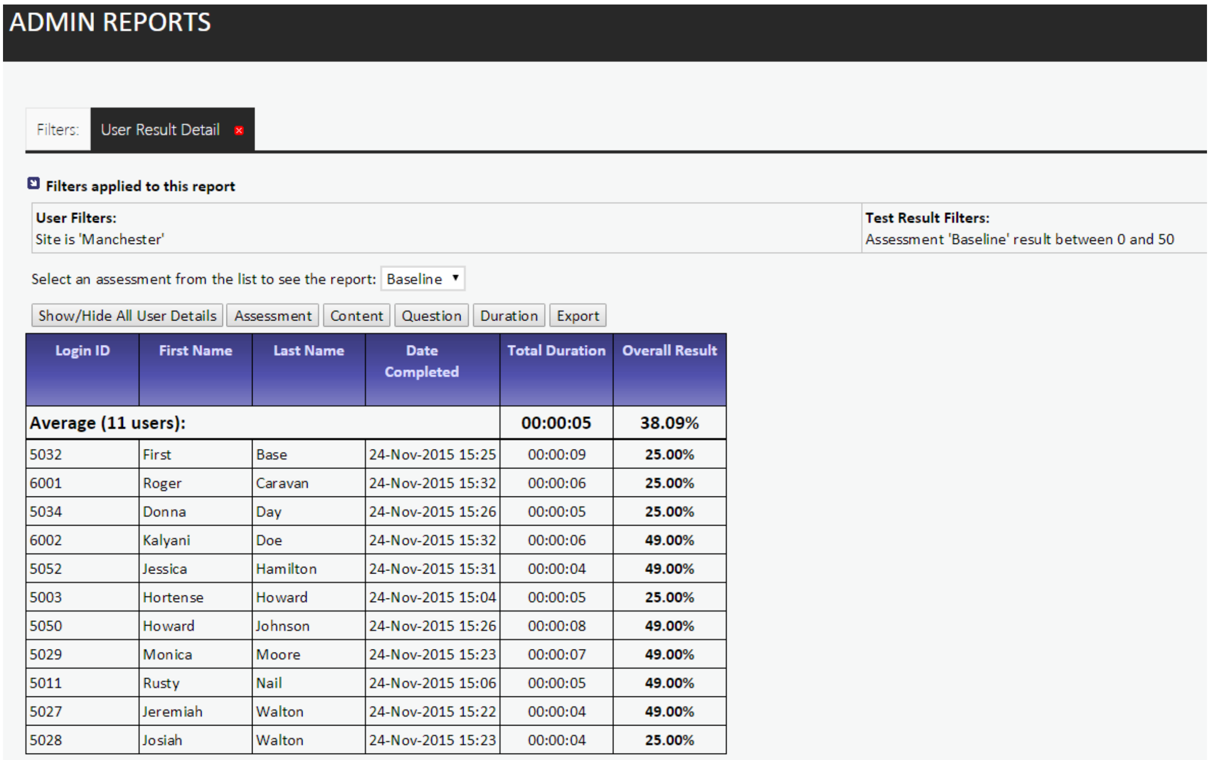


Figure 156: Display of selected filters

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:


ADMIN REPORTS

Filters: User Result Detail

Filters applied to this report

User Filters:
Site is 'Manchester'

Test Result Filters:
Assessment 'Baseline' result between 0 and 50

Select an assessment from the list to see the report: Baseline

Show/Hide All User Details | Assessment | Content | Question | Duration | Export

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 157: 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**.

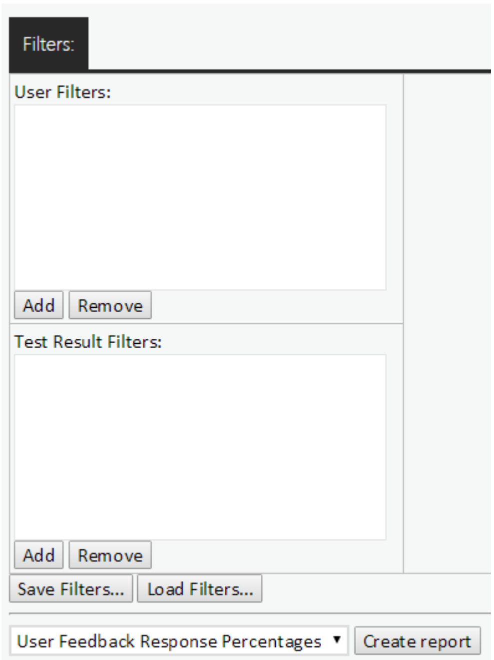


Figure 158: Creating a user feedback response percentages report

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.

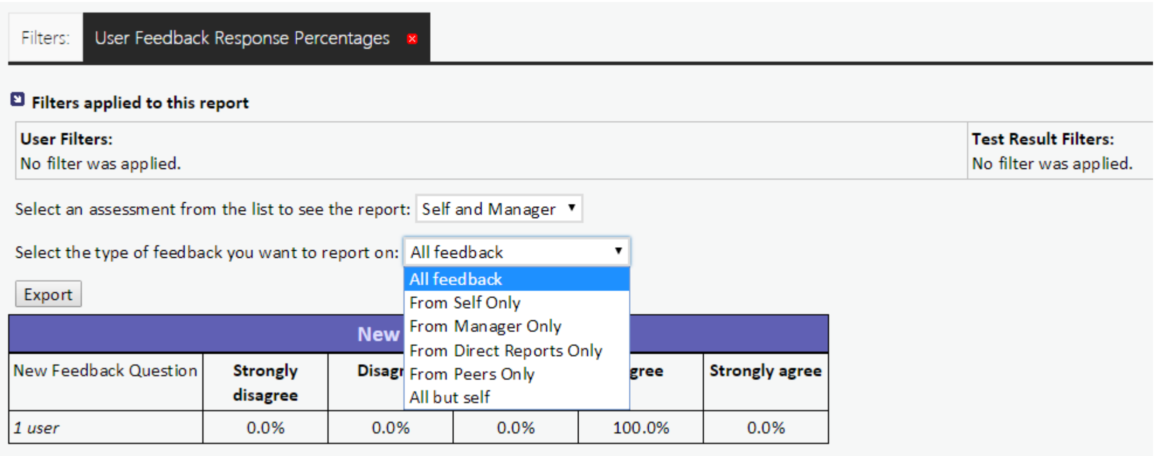
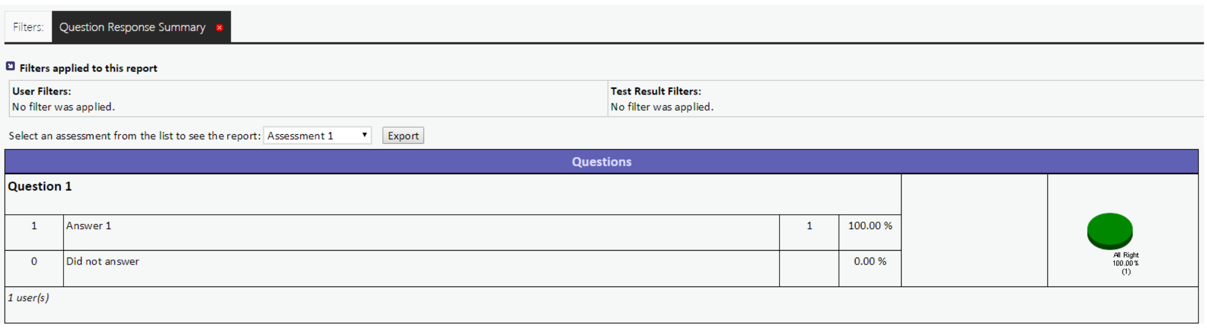


Figure 159: Selecting the report's assessment and feedback type

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 160: 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.

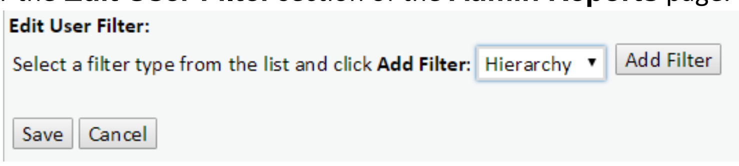


Figure 161: Using the organisational hierarchy as a filter

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

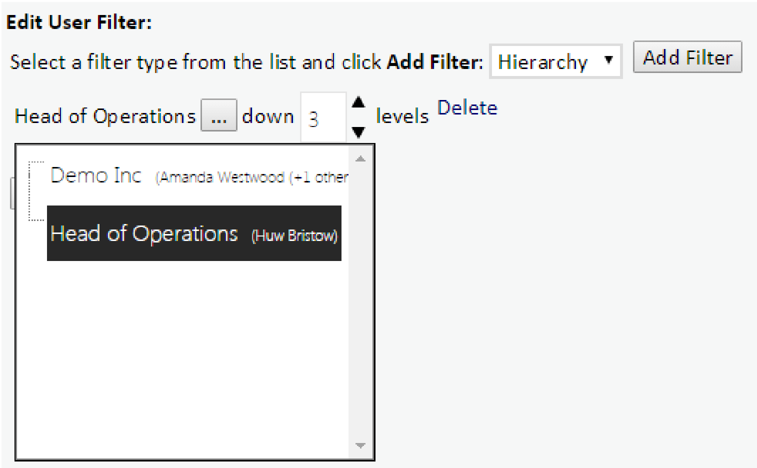


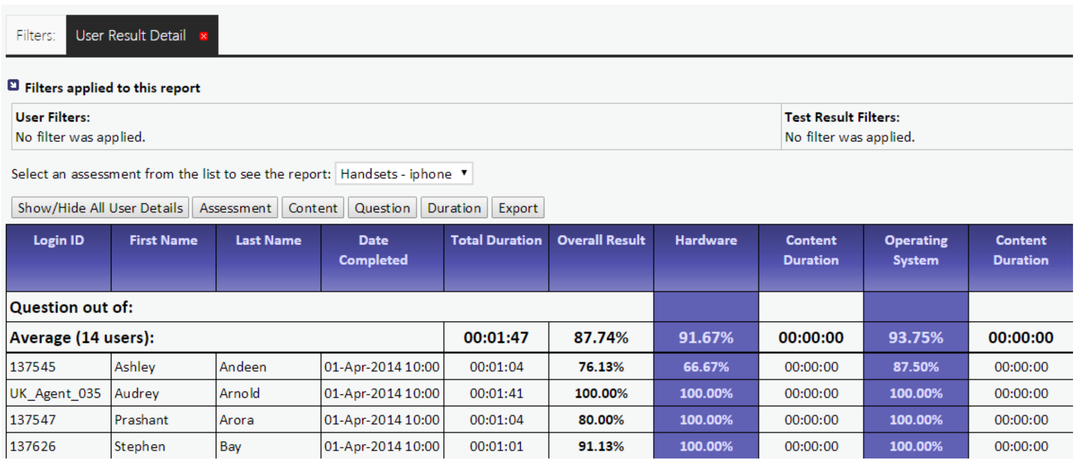
Figure 162: Using the organisational hierarchy as a filter

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 163: 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.

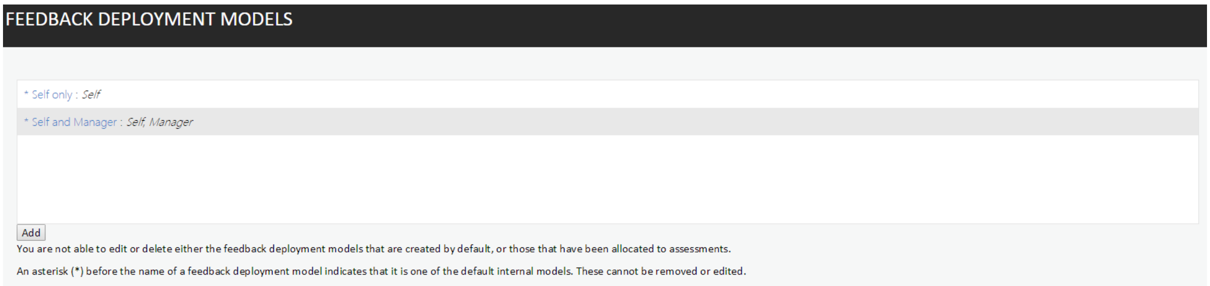


Figure 164: Feedback Deployment Models

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.

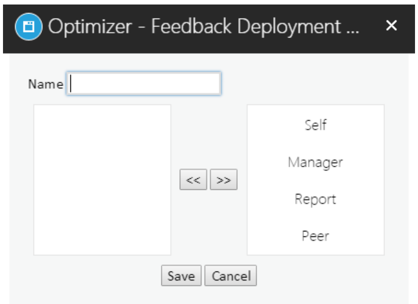


Figure 165: Creating feedback models

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.

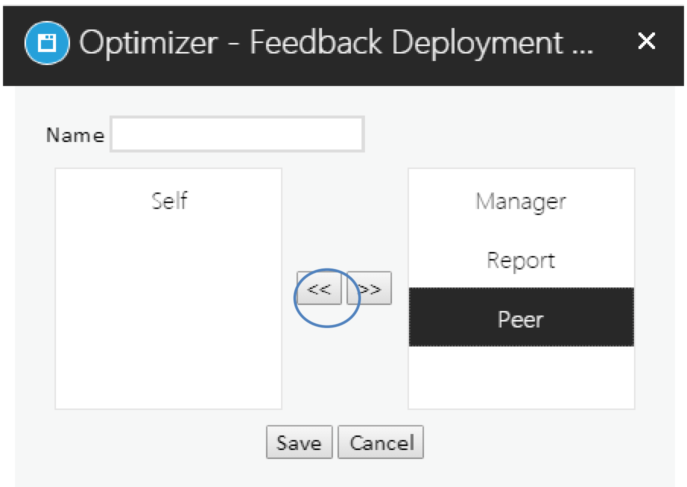


Figure 166: Selecting a feedback model

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

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

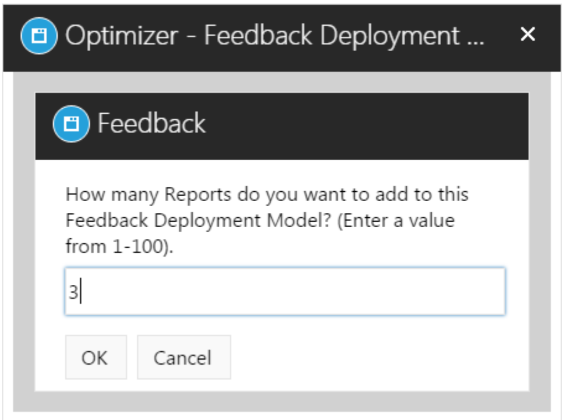


Figure 167: Setting the number of required reports

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

Performance DNA 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:

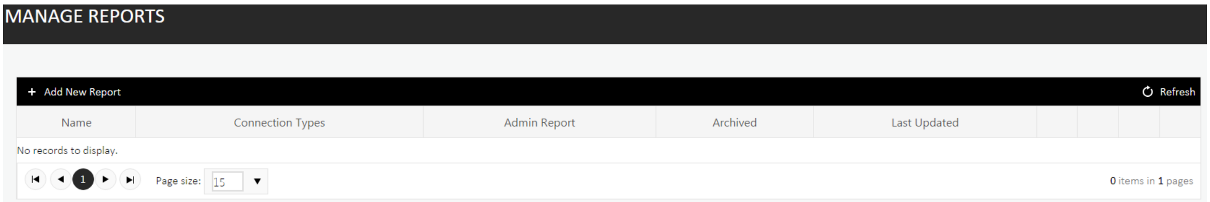


Figure 168: Manage Reports Page

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 Performance DNA and Training Manager and any combination of the two 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 Performance DNA. This will result in the report file being retained by the server; however, it will not be accessible via Performance DNA. 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 Performance DNA 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 169: Selecting the Skillsroute page

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

Figure 170: 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 171: 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.

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

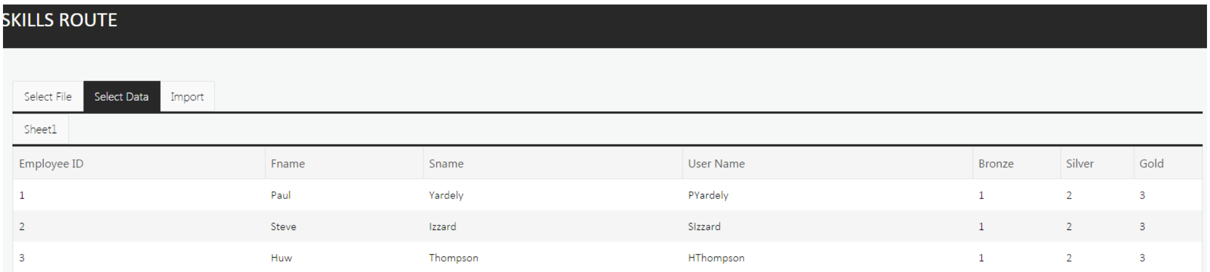
Figure 172: Creating a new employee

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.

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 173: 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 174: Confirming accuracy of input data

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

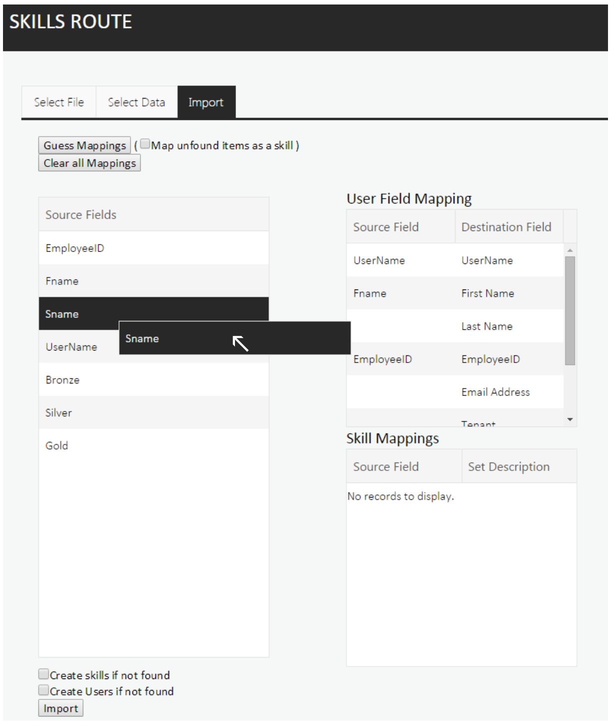


Figure 175: Mapping source and user fields

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.

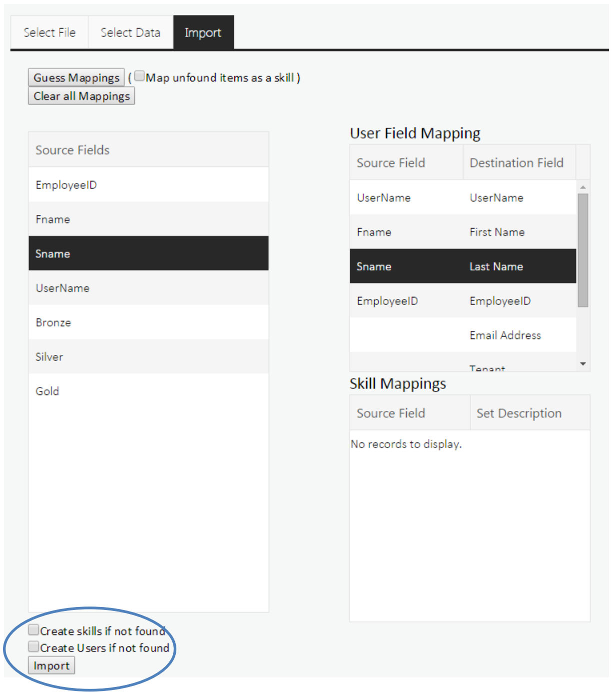


Figure 176: Finalising the import of employee data

24 CME Authentication (Genesys environment only)

If Performance DNA 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 Performance DNA and select the **Field Mappings** tab.

This will display a screen similar to the following example:

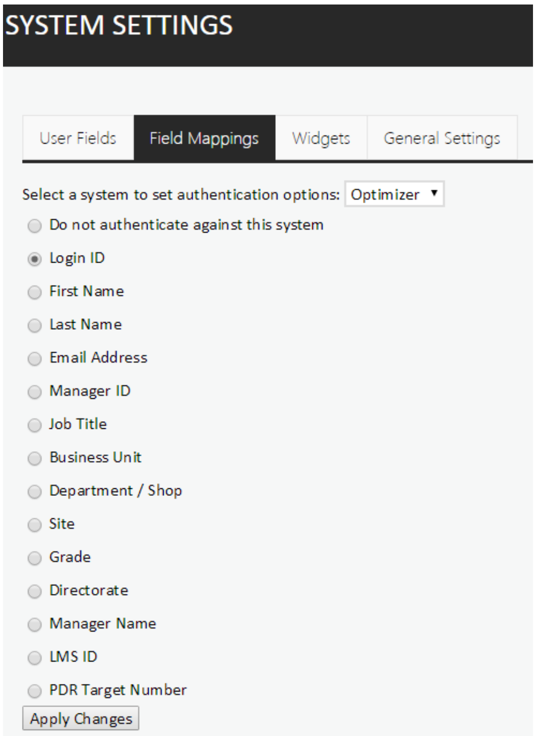


Figure 177: Authenticating user access via their CME credentials

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 Performance DNA they will be able to select **Genesys GIS** as the **Select System** option rather than Performance DNA.

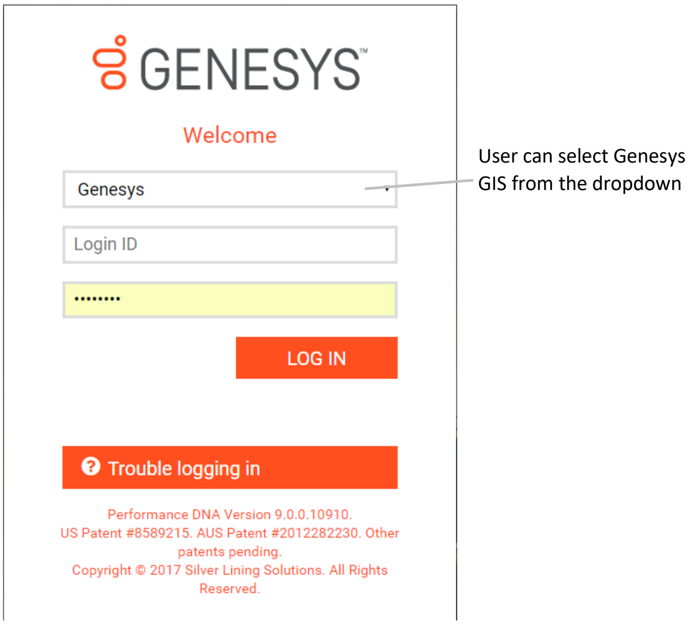


Figure 178: Selecting Genesys for authenticating user credentials

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

25 SkillsDNA Creation

Before DNA Sequences and Strands can be created DNA Base Data must be defined and KPI data imported. The DNA Base Data and KPI data is also used in the SkillsAnalysis page for correlation analysis.

25.1 Manually Managing DNA Base Data

To begin creating DNA Strands, first select the **DNA Base Data Definitions** page.

Figure 179: DNA Base Data Definitions page

There are 2 types of DNA Base Data:

1. **Assessments** – Imported Assessment scores (historical) or Assessment data from a 3rd party system.
2. **KPI** – Imported Key Performance Indicators and other Performance data.

To Create a new DNA Base Data, click on the **+ ADD** button.

Figure 180: Create DNA Base Data

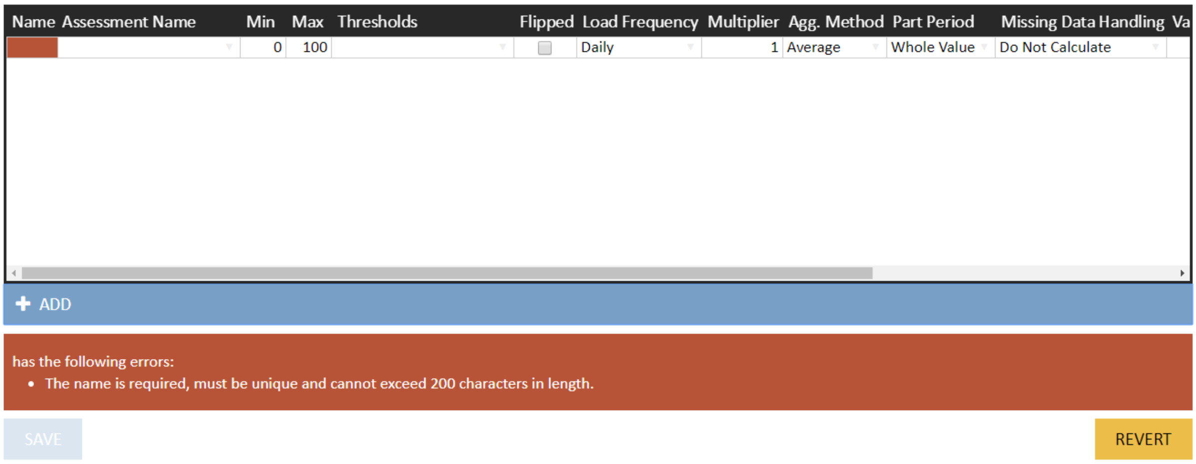


Figure 181: Defining DNA Base Data

For the Base Data, provide a unique Name, description and then configure the remaining information as required, including:

- **Name** – this must be a unique name. In environments with several measures of similar names best practice would be to prefix the name with the business area i.e. Sales – AHT, Email – AHT.
- **Assessment Name** – this links the imported value to a specific Assessment within the system. To select the Assessment, you can either start typing the name and select the Assessment from the auto filtered list, or you can select the Assessment manually from the dropdown list.
- **Min (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.
- **Max (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.
- **Thresholds** – this allows you to assign a previously created Threshold to this base data definition*. If there are no Thresholds available, this column will just show “<None>”.

- **Flipped*** – by default Performance DNA 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, the system treats lower scores as better.
- **Load Frequency** – From the dropdown select if the Base Data is measured, and imported, at a Daily, Weekly or Monthly level.
- **Multiplier** – this is used to set the Load Frequency recurrence.
  - 1 means the data is expected every Day, Week or Month
  - 2 would indicate the data is expected every 2nd Day, Week or Month
- **Agg. Method** – defines the aggregation method used when reporting on this data. The options are:
  - **Sum** – the values are added together
  - **Average** – the values are averaged
  - **No Aggregation Allowed** – if the reporting period is larger than the data frequency, then no value will be available for this item. (i.e. if you try to view a "daily" data item for a reporting period of more than one day)
- **Part Period** – defines how data is reported when the data frequency is smaller than the reporting period (i.e. reporting for a week when the data is imported monthly). The options are:
  - **Whole Value** – uses the value for the period in its entirety
  - **Fraction –** scales the value for the data to the fraction of the reporting period that it falls within (i.e. a weekly value of "7" would score "1" for a single day)
  - **Reporting not allowed –** if the reporting period does not match the data frequency, no value will be available for this item.
- **Missing Data Handling** – defines what data is to be used if there is gap in the imported values. The options are:
  - **Default Value** – User defined default value
  - **Skip** – Just use the data that is in the system
  - **Do Not Calculate** –No value is used if there is missing data for a Base Data Definition.
- **Value** – this is the user defined value that will be used if there is missing data for this Base Data Definition.
- **Precision** – The number of decimal places that this Base Data Definition should be reported to.

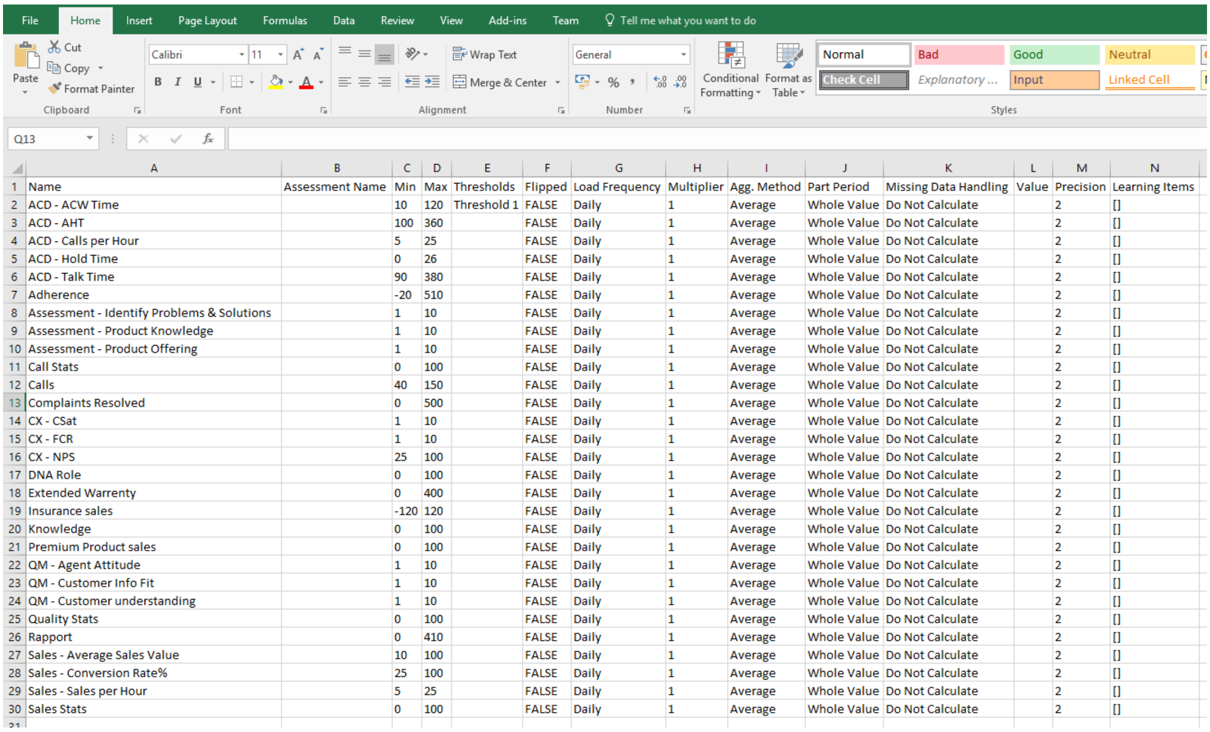
*When **Flipped** is checked, the lower end of the data value range aligns with the upper end of Thresholds, and vice-versa.

Note: Once a valid and unique name has been created the validation error with be removed.

Once you have configured the Base Data details click **Save** to create the Base Data. If there are any validation errors these will be shown below the Base Data Definitions grid.

25.2 Managing Base Data Definitions with Excel

For environments with many Base Data Definitions it is possible to replicate the Base Data Definitions grid within a spreadsheet and copy them into Performance DNA.



	Name	Assessment Name	Min	Max	Thresholds	Flipped	Load Frequency	Multiplier	Agg. Method	Part Period	Missing Data Handling	Value	Precision	Learning Items
2	ACD - ACW Time		10	120	Threshold 1	FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
3	ACD - AHT		100	360		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
4	ACD - Calls per Hour		5	25		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
5	ACD - Hold Time		0	26		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
6	ACD - Talk Time		90	380		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
7	Adherence		-20	510		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
8	Assessment - Identify Problems & Solutions		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
9	Assessment - Product Knowledge		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
10	Assessment - Product Offering		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
11	Call Stats		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
12	Calls		40	150		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
13	Complaints Resolved		0	500		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
14	CX - CSat		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
15	CX - FCR		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
16	CX - NPS		25	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
17	DNA Role		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
18	Extended Warrenty		0	400		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
19	Insurance sales		-120	120		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
20	Knowledge		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
21	Premium Product sales		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
22	QM - Agent Attitude		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
23	QM - Customer Info Fit		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
24	QM - Customer understanding		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
25	Quality Stats		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
26	Rapport		0	410		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
27	Sales - Average Sales Value		10	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
28	Sales - Conversion Rate%		25	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
29	Sales - Sales per Hour		5	25		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
30	Sales Stats		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]

Figure 182: Defining DNA Base Data Spreadsheet

25.2.1 Creating New Base Data Definitions from a Spreadsheet

To copy Base Data Definitions from your spreadsheet you will need to create a new entry line in the Base Data Definitions grid by Clicking the **+Add** button.

Figure 183: Create DNA Base Data

Copy the Base Data information from your spreadsheet and select the highlighted cell on the Base Data Definitions grid using Ctrl+V to paste the data.

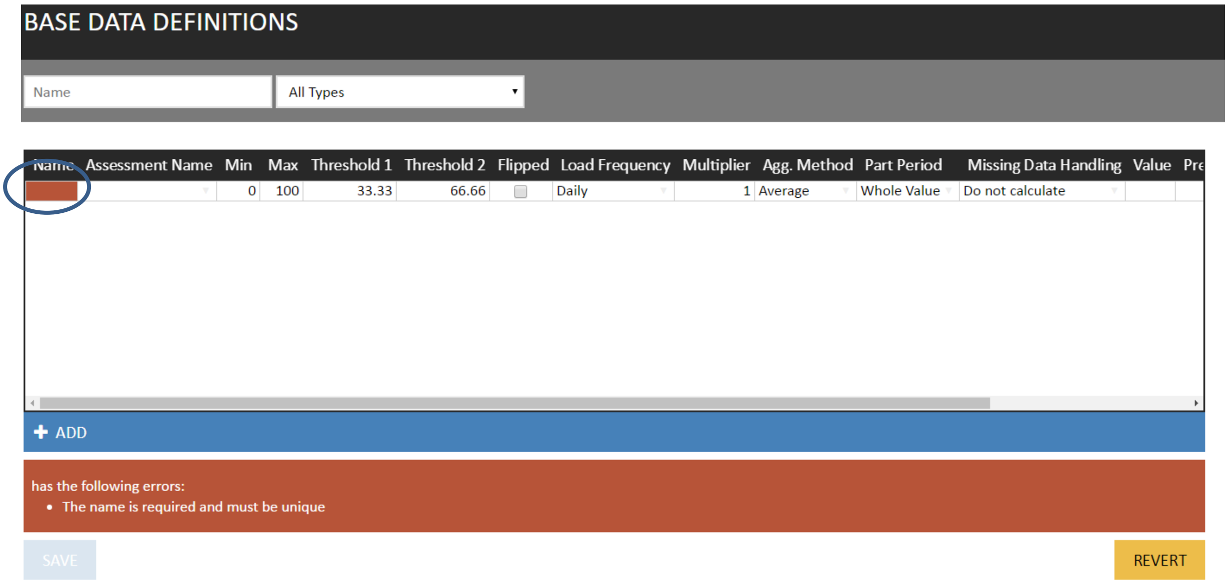
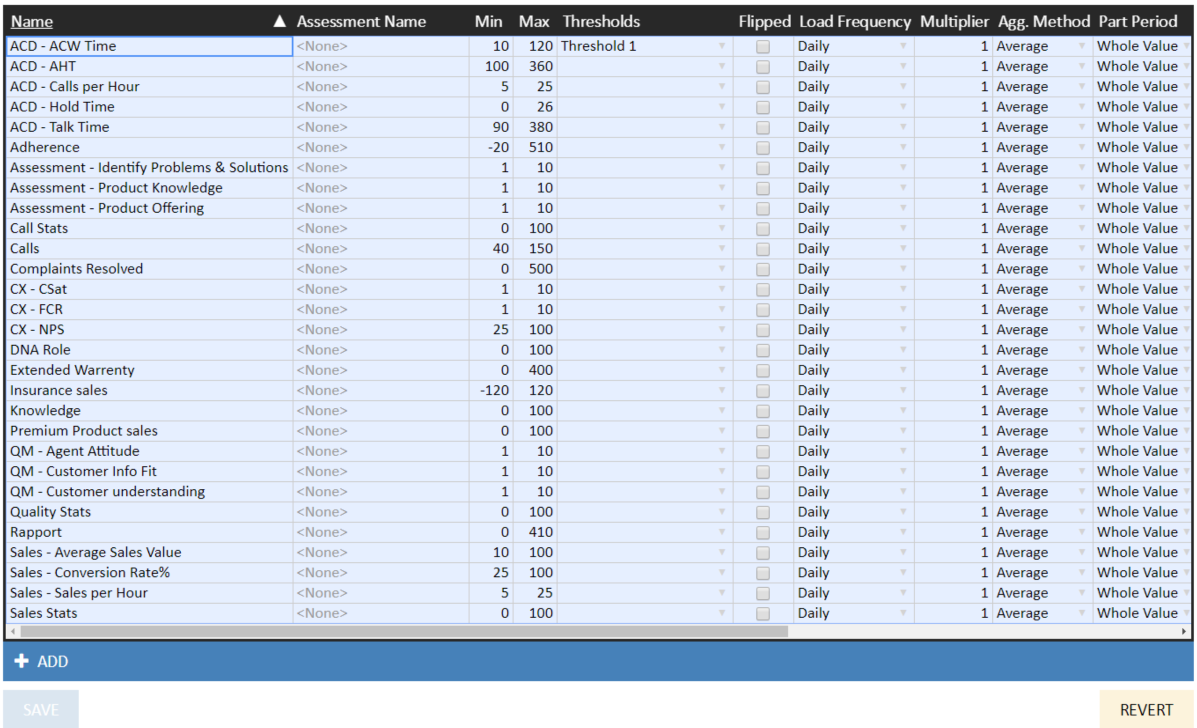


Figure 184: New Base Data Entry Line



Name	Assessment Name	Min	Max	Thresholds	Flipped	Load Frequency	Multiplier	Agg. Method	Part Period
ACD - ACW Time	<None>	10	120	Threshold 1		Daily	1	Average	Whole Value
ACD - AHT	<None>	100	360			Daily	1	Average	Whole Value
ACD - Calls per Hour	<None>	5	25			Daily	1	Average	Whole Value
ACD - Hold Time	<None>	0	26			Daily	1	Average	Whole Value
ACD - Talk Time	<None>	90	380			Daily	1	Average	Whole Value
Adherence	<None>	-20	510			Daily	1	Average	Whole Value
Assessment - Identify Problems & Solutions	<None>	1	10			Daily	1	Average	Whole Value
Assessment - Product Knowledge	<None>	1	10			Daily	1	Average	Whole Value
Assessment - Product Offering	<None>	1	10			Daily	1	Average	Whole Value
Call Stats	<None>	0	100			Daily	1	Average	Whole Value
Calls	<None>	40	150			Daily	1	Average	Whole Value
Complaints Resolved	<None>	0	500			Daily	1	Average	Whole Value
CX - CSat	<None>	1	10			Daily	1	Average	Whole Value
CX - FCR	<None>	1	10			Daily	1	Average	Whole Value
CX - NPS	<None>	25	100			Daily	1	Average	Whole Value
DNA Role	<None>	0	100			Daily	1	Average	Whole Value
Extended Warrenty	<None>	0	400			Daily	1	Average	Whole Value
Insurance sales	<None>	-120	120			Daily	1	Average	Whole Value
Knowledge	<None>	0	100			Daily	1	Average	Whole Value
Premium Product sales	<None>	0	100			Daily	1	Average	Whole Value
QM - Agent Attitude	<None>	1	10			Daily	1	Average	Whole Value
QM - Customer Info Fit	<None>	1	10			Daily	1	Average	Whole Value
QM - Customer understanding	<None>	1	10			Daily	1	Average	Whole Value
Quality Stats	<None>	0	100			Daily	1	Average	Whole Value
Rapport	<None>	0	410			Daily	1	Average	Whole Value
Sales - Average Sales Value	<None>	10	100			Daily	1	Average	Whole Value
Sales - Conversion Rate%	<None>	25	100			Daily	1	Average	Whole Value
Sales - Sales per Hour	<None>	5	25			Daily	1	Average	Whole Value
Sales Stats	<None>	0	100			Daily	1	Average	Whole Value

ADD

SAVE

REVERT

Figure 185: Pasted Base Data Definitions

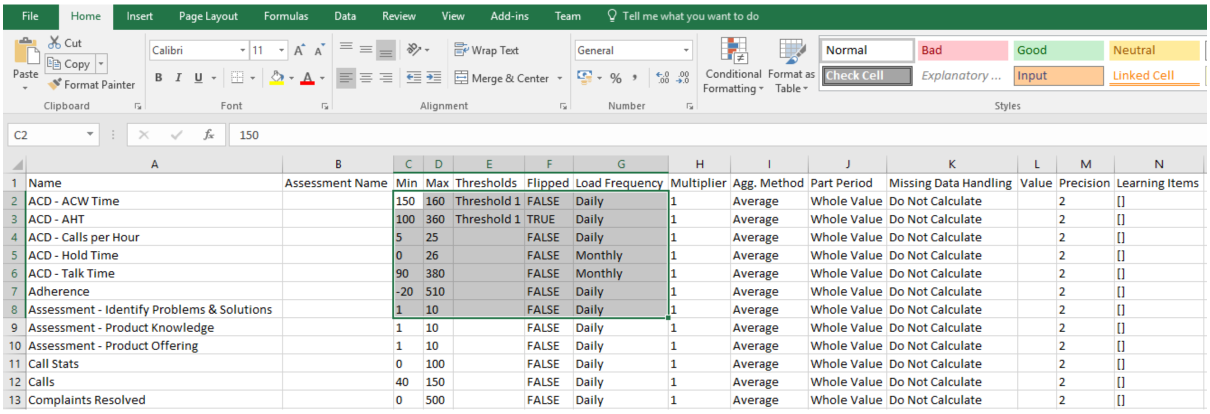
After sense checking the data click **Save** to create the new Base Data Definitions.

Notes:

For optimum performance, it is recommended that Base Data Definitions are pasted and saved to the grid in batches of 50.

25.2.2 Updating Base Data Definitions from a Spreadsheet

Over time Base Data targets may change. After updating your Base Data Definitions spreadsheet to reflect these trends or business changes it is possible to copy and paste sections of the data to reflect the changes in Performance DNA.

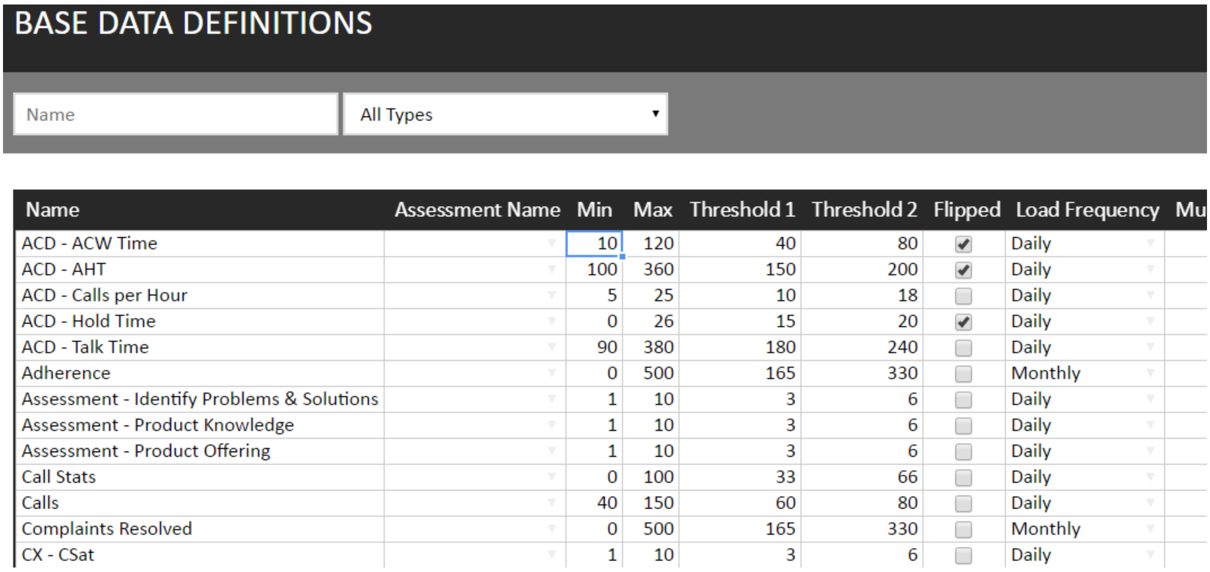


	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Name	Assessment Name	Min	Max	Thresholds	Flipped	Load Frequency	Multiplier	Agg. Method	Part Period	Missing Data Handling	Value	Precision	Learning Items
2	ACD - ACW Time		150	160	Threshold 1	FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
3	ACD - AHT		100	360	Threshold 1	TRUE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
4	ACD - Calls per Hour		5	25		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
5	ACD - Hold Time		0	26		FALSE	Monthly	1	Average	Whole Value	Do Not Calculate		2	[]
6	ACD - Talk Time		90	380		FALSE	Monthly	1	Average	Whole Value	Do Not Calculate		2	[]
7	Adherence		-20	510		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
8	Assessment - Identify Problems & Solutions		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
9	Assessment - Product Knowledge		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
10	Assessment - Product Offering		1	10		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
11	Call Stats		0	100		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
12	Calls		40	150		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]
13	Complaints Resolved		0	500		FALSE	Daily	1	Average	Whole Value	Do Not Calculate		2	[]

Figure 186: Updated Base Data Definitions

Select the Cells that have been updated in the spreadsheet and copy them.

From the Base Data Definitions grid select the first cell of the data range that is to be updated and paste the data using Ctrl+V.

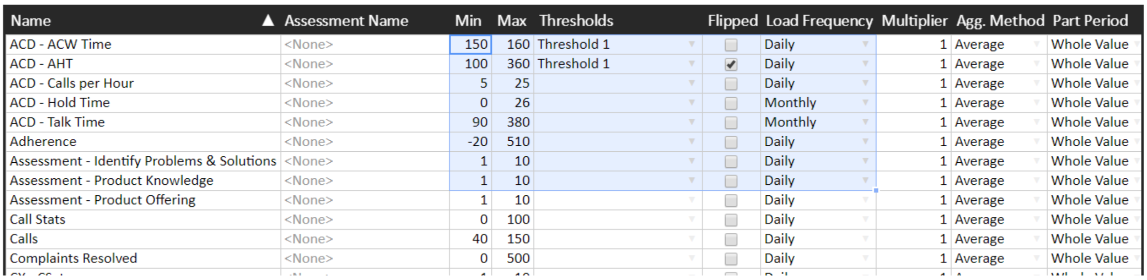


BASE DATA DEFINITIONS

Name | All Types

Name	Assessment Name	Min	Max	Threshold 1	Threshold 2	Flipped	Load Frequency
ACD - ACW Time		10	120	40	80	✓	Daily
ACD - AHT		100	360	150	200	✓	Daily
ACD - Calls per Hour		5	25	10	18		Daily
ACD - Hold Time		0	26	15	20	✓	Daily
ACD - Talk Time		90	380	180	240		Daily
Adherence		0	500	165	330		Monthly
Assessment - Identify Problems & Solutions		1	10	3	6		Daily
Assessment - Product Knowledge		1	10	3	6		Daily
Assessment - Product Offering		1	10	3	6		Daily
Call Stats		0	100	33	66		Daily
Calls		40	150	60	80		Daily
Complaints Resolved		0	500	165	330		Monthly
CX - CSat		1	10	3	6		Daily

Figure 187: Selecting data range



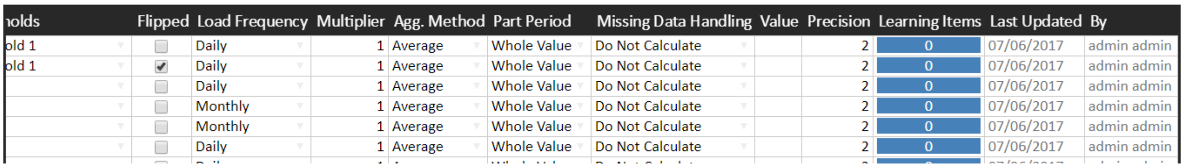
Name	Assessment Name	Min	Max	Thresholds	Flipped	Load Frequency	Multiplier	Agg. Method	Part Period
ACD - ACW Time	<None>	150	160	Threshold 1		Daily	1	Average	Whole Value
ACD - AHT	<None>	100	360	Threshold 1	✓	Daily	1	Average	Whole Value
ACD - Calls per Hour	<None>	5	25			Daily	1	Average	Whole Value
ACD - Hold Time	<None>	0	26			Monthly	1	Average	Whole Value
ACD - Talk Time	<None>	90	380			Monthly	1	Average	Whole Value
Adherence	<None>	-20	510			Daily	1	Average	Whole Value
Assessment - Identify Problems & Solutions	<None>	1	10			Daily	1	Average	Whole Value
Assessment - Product Knowledge	<None>	1	10			Daily	1	Average	Whole Value
Assessment - Product Offering	<None>	1	10			Daily	1	Average	Whole Value
Call Stats	<None>	0	100			Daily	1	Average	Whole Value
Calls	<None>	40	150			Daily	1	Average	Whole Value
Complaints Resolved	<None>	0	500			Daily	1	Average	Whole Value

Figure 188: Selecting data range

After checking for any validation errors click **Save.**

25.2.3 Learning Items.

Each base data definition can be linked to multiple Learning Items.



olds	Flipped	Load Frequency	Multiplier	Agg. Method	Part Period	Missing Data Handling	Value	Precision	Learning Items	Last Updated	By
old 1		Daily	1	Average	Whole Value	Do Not Calculate		2	0	07/06/2017	admin admin
old 1	✓	Daily	1	Average	Whole Value	Do Not Calculate		2	0	07/06/2017	admin admin
		Daily	1	Average	Whole Value	Do Not Calculate		2	0	07/06/2017	admin admin
		Monthly	1	Average	Whole Value	Do Not Calculate		2	0	07/06/2017	admin admin
		Monthly	1	Average	Whole Value	Do Not Calculate		2	0	07/06/2017	admin admin
		Daily	1	Average	Whole Value	Do Not Calculate		2	0	07/06/2017	admin admin

Figure 189: Attached Learning Items

The number in the Learning Items column represents the count of learning items associated with the base data definition. Clicking on the number opens the Edit Learning Item screen.

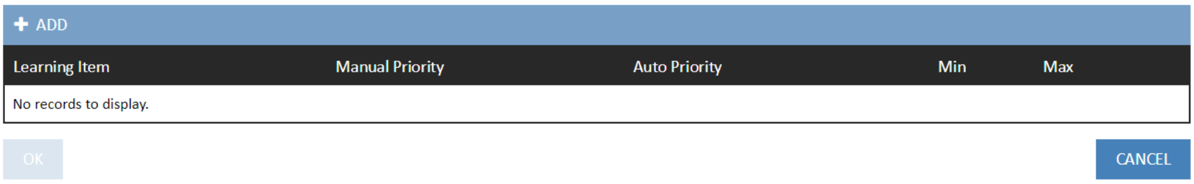


Figure 190: Attaching Learning Items

Clicking **Add** will add a learning item.

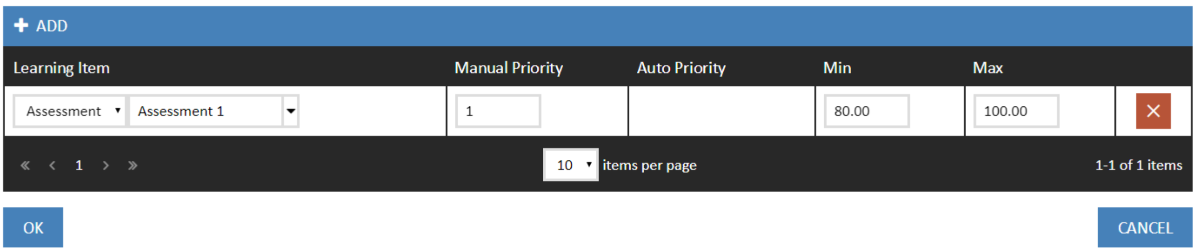


Figure 191: Setting Learning Item Range

You can add as many as you like. Auto Priority is reserved for a future feature. Manual priority is the order that you would like the learning items to be assigned. Min and max are the range used to determine When the learning item will be assigned. So, in the example above, if you score between 80 and 100 in Assessment 1 then the learning item will be assigned.

25.3 Calculated Data

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

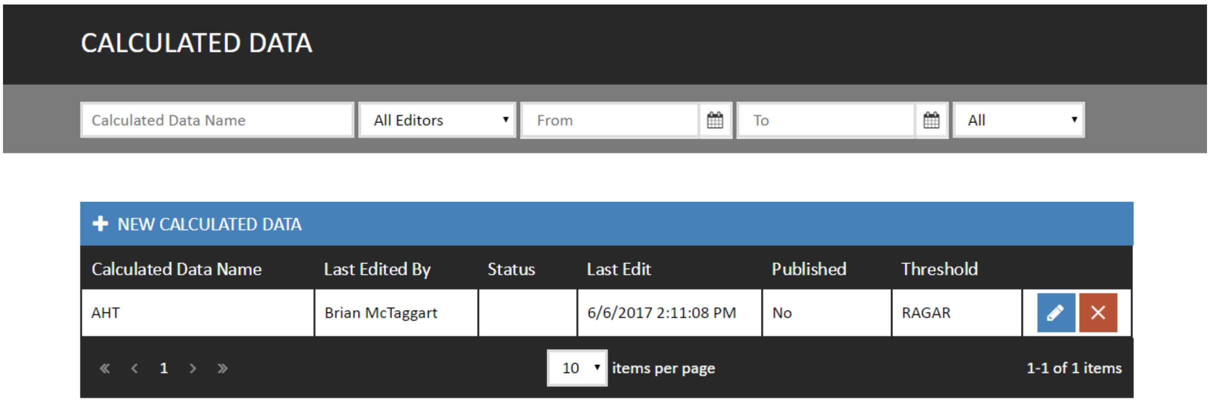


Figure 192: Calculated Data page

The grid shows you key information about each of your calculations. To see the detail on the calculation, you must click the Edit button for that calculation.

Note: If you have any calculations that were created prior to version 4.9, you must edit each of the calculations and provide values for the **Min**, **Max** and **Precision** values (and optionally a threshold) before they will provide a value for DNA.

25.3.1 Searching and filtering Calculated Data

The top of the Calculated Data page includes a search bar and filters to restrict the number of Calculated Data based on entered criteria. The first box at the top of the page supports searching of Calculated Data for specific criteria. Entering a value into the Calculated Data search box will result in the page removing all Calculated Data which do not contain the value in the Base Data'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 Data based on the editor. Selecting an editor from this drop-down will remove any Calculated Data 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 Data to just the items that were last edited in the specified 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 Data.

25.3.2 Calculated Data Status

The Calculated Data page includes a status bar under the searching and filtering features. This bar shows how many published Calculated Data 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 Data occurs automatically every minute (**Note**: there is no option to manually process Calculated Data). This will only occur if there is new KPI data or new Calculated Data have been published since the last time the Base Data were processed. Users will not have a value for Calculated Data until the Base Data has been published and processed.

25.3.3 View of Calculated Data

The main part of the Calculated Data page includes a table listing the Calculated Data for the current database. This view may not include all Calculated Data 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 Data 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 Data 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 Data available. The top of the table includes a button that allows for the creation of new Calculated Data. The table headers also support sorting, clicking multiple times will cycle through ascending/descending order for the selected column.

25.3.4 New Calculated Data Form

To create a new Calculated Data, click the '+ New Calculated Data' at the top of the table of Calculated Data. 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.

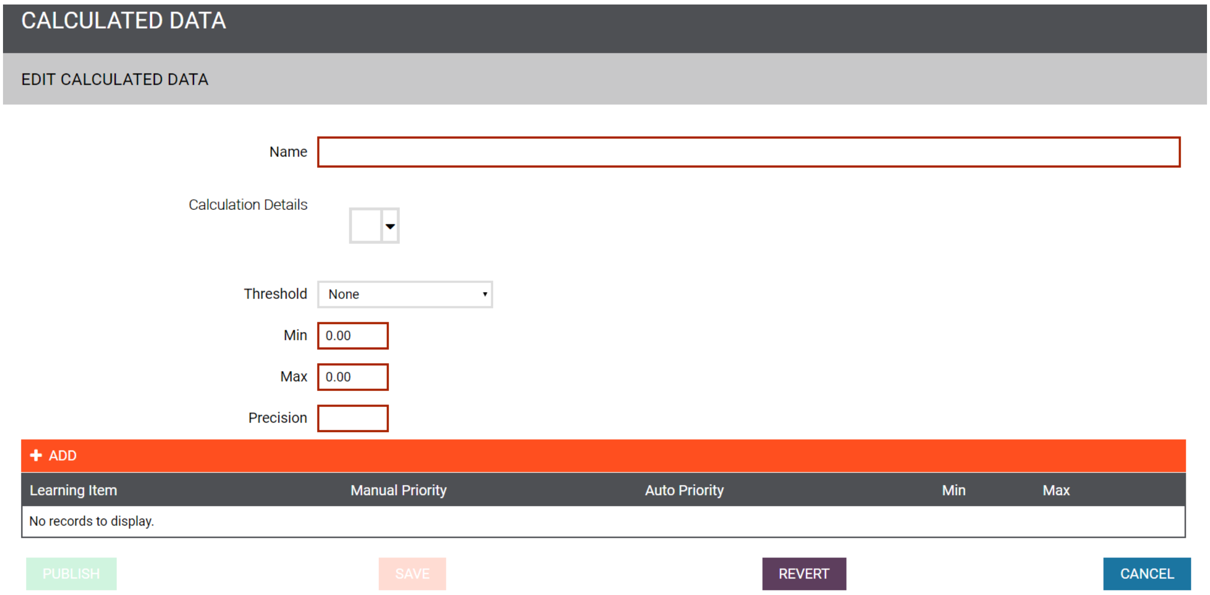


Figure 193: Creating a new Calculated Data

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.

Below the calculation, you can select an optional Threshold to apply to this calculation. You must also select an aggregation method from the list (the default is **Average**) and provide the minimum (**Min**) and maximum (**Max**) values that will be considered for reporting purposes. The **Precision** value determines how many decimal places will be used when displaying the results of this calculation.

The **Learning Items** grid allows you to add Learning Items to the learning calculated data, and clicking **Add** will allow you to add a new one.

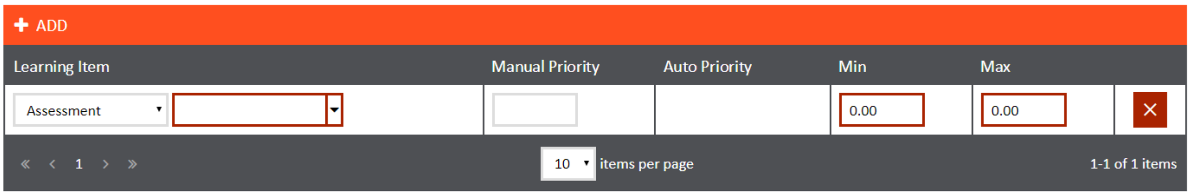


Figure 194: Assigning Learning Items

It is possible to add any number of learning items. The Manual Priority is which order you would like the learning items to be assigned, Auto Priority is not currently used at the moment, and Min and Max determine when the learning item will be assigned.

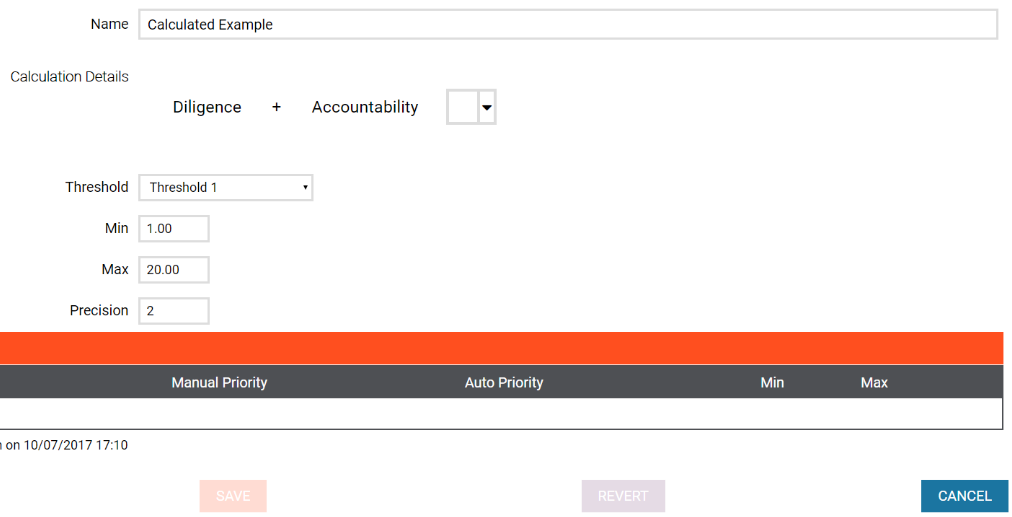


Figure 195: Editing a Calculated Data

The bottom of the page includes 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 Data once the formula has been processed. Editing a published formula will display the published version of the formula at the top of the screen, with the editable version below it.

Notes:

Only **Published** Calculated Data can be added to DNA strands.

Published Calculated Data cannot be deleted.

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

25.4 Import KPI Data

This is the data spreadsheet that will be imported into Performance DNA to create the DNA Strands 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.

	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

Figure 196: Importing Key Performance information via a spreadsheet

25.4.1 Manually Importing KPI data

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

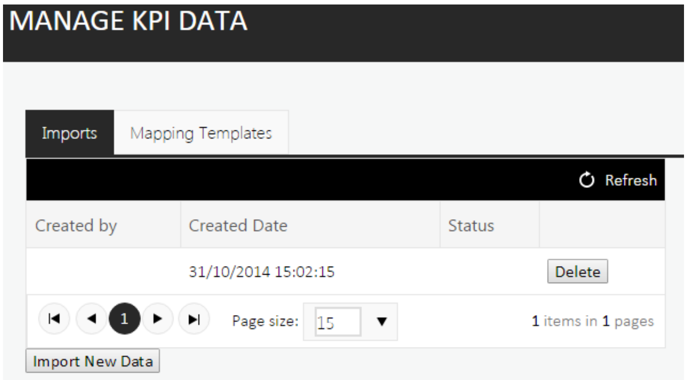


Figure 197: Importing KPI data

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**.

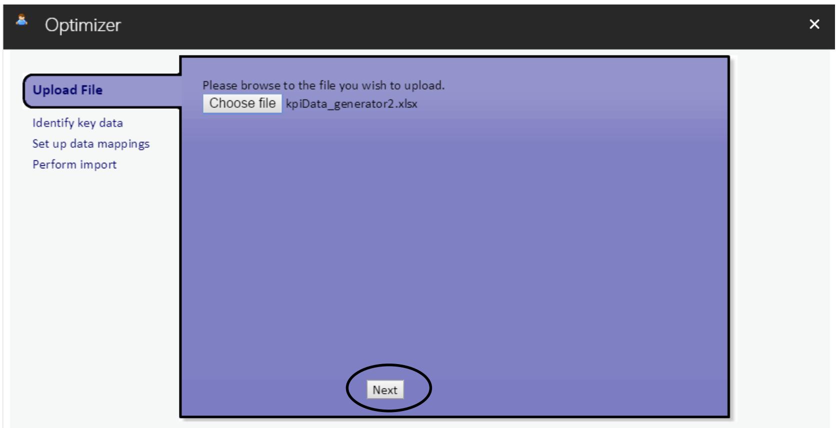


Figure 198: Importing KPI data

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.

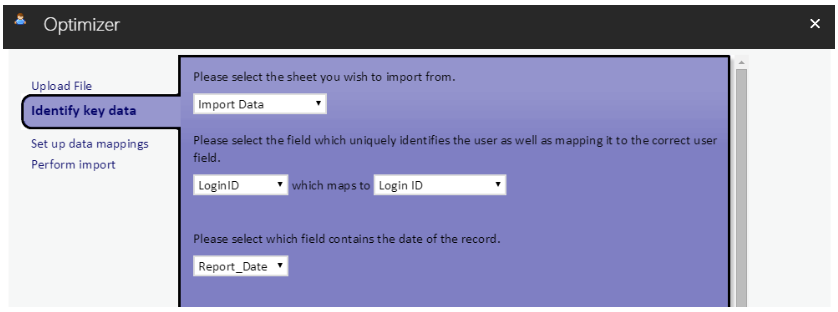


Figure 199: Importing KPI data

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

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

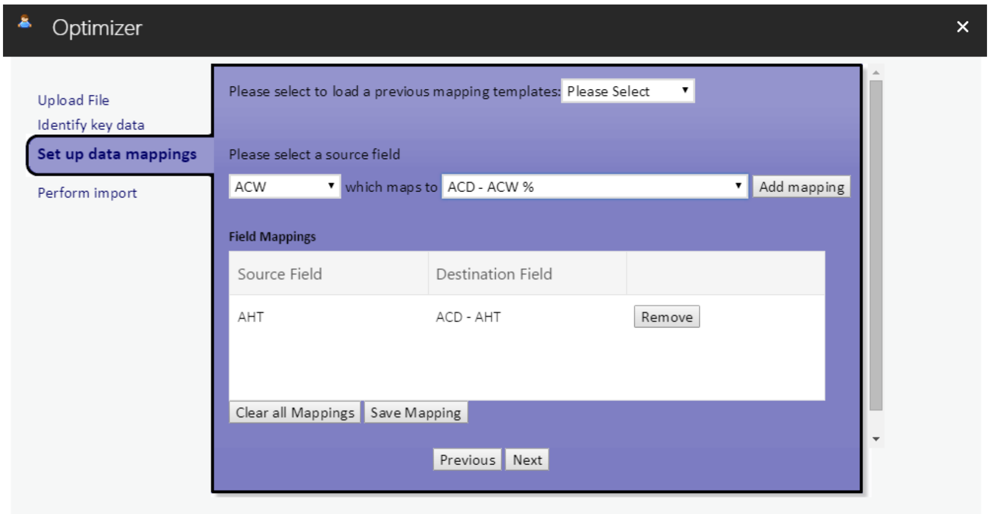


Figure 200: Mapping source fields to existing components

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 Base Data.

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

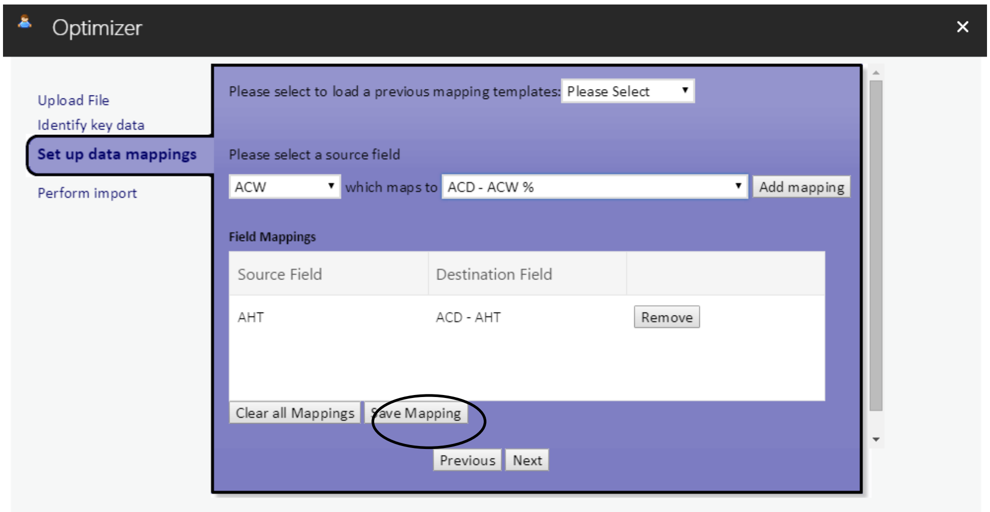


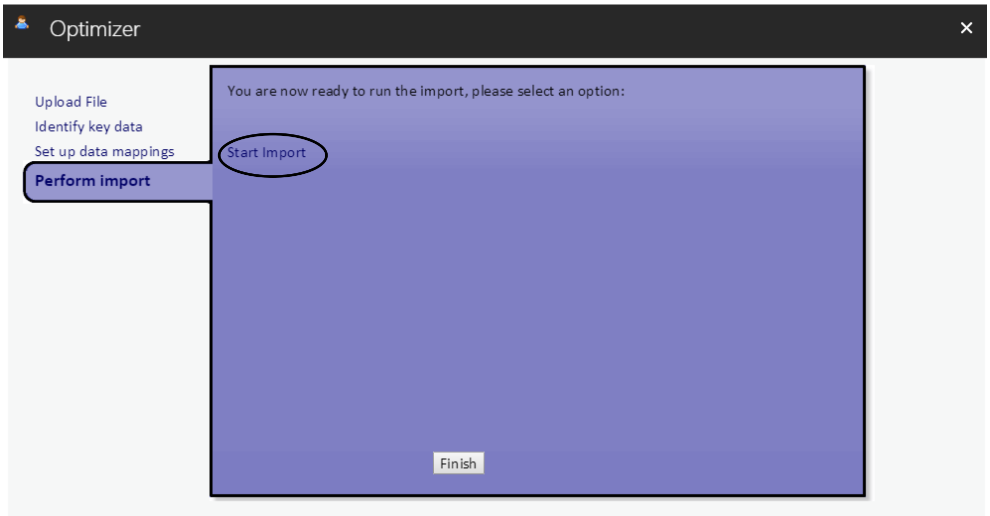
Figure 201: Viewing mapping results and saving import templates

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 202: Starting data import

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

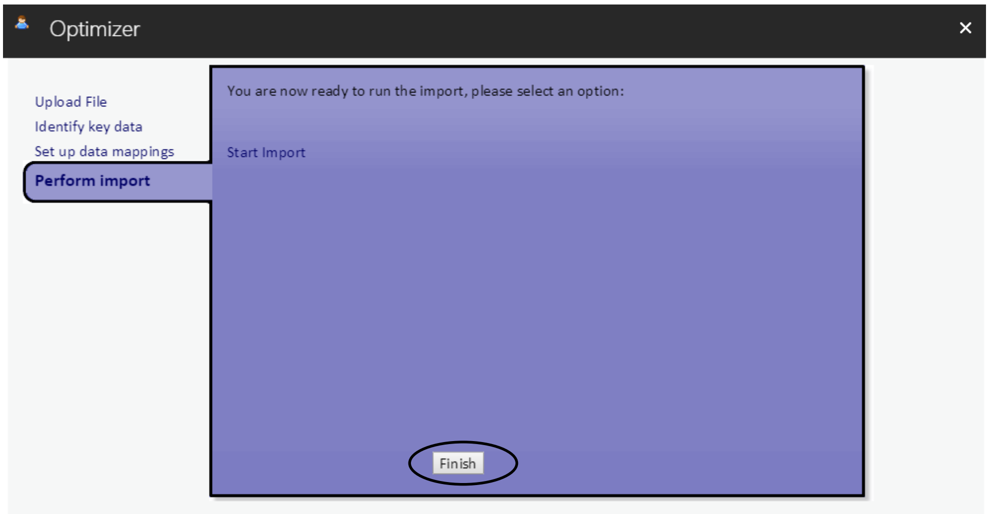


Figure 203: Finalising data import

The data import will then show in the import log.

25.4.2 Deleting Previously Imported Data

Previous import files, and the corresponding data can be manually deleted using the **Manage KPI** page by clicking the **Delete** button next to the import file details.

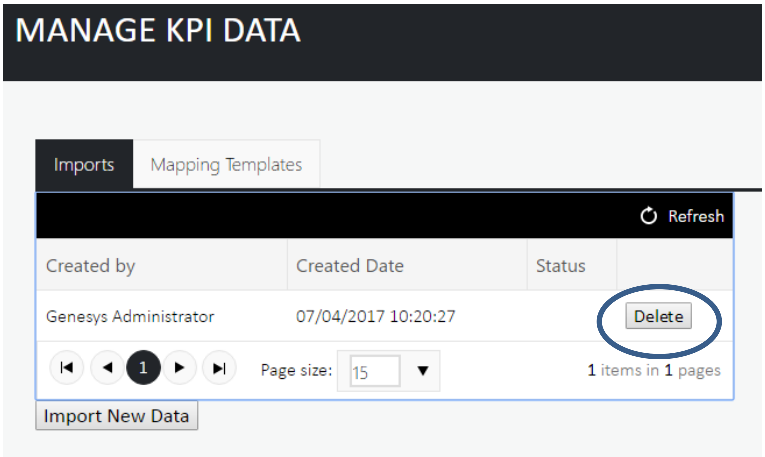


Figure 204: Deleting KPI Import file

25.4.3 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 (there is an xml file for configuration) 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. Xlsx and csv files are supported. An import template will need to be setup for this.

25.5 My DNA

The **My DNA** page allows users to view their current scores for all assigned **Strands**. The data visualisation supports drill-down.

25.5.1 Date Range

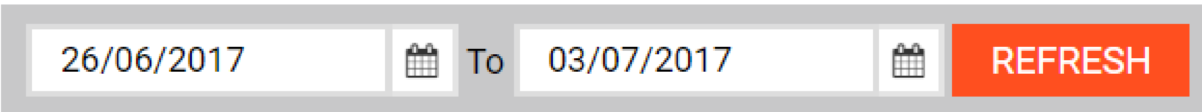


Figure 205: Selecting Date Range

The data is shown for the selected date range, which defaults to the last week.

25.5.2 Data Visualisation

The performance data is displayed as a series of partition charts with the user's assigned **Strands** at the top level.

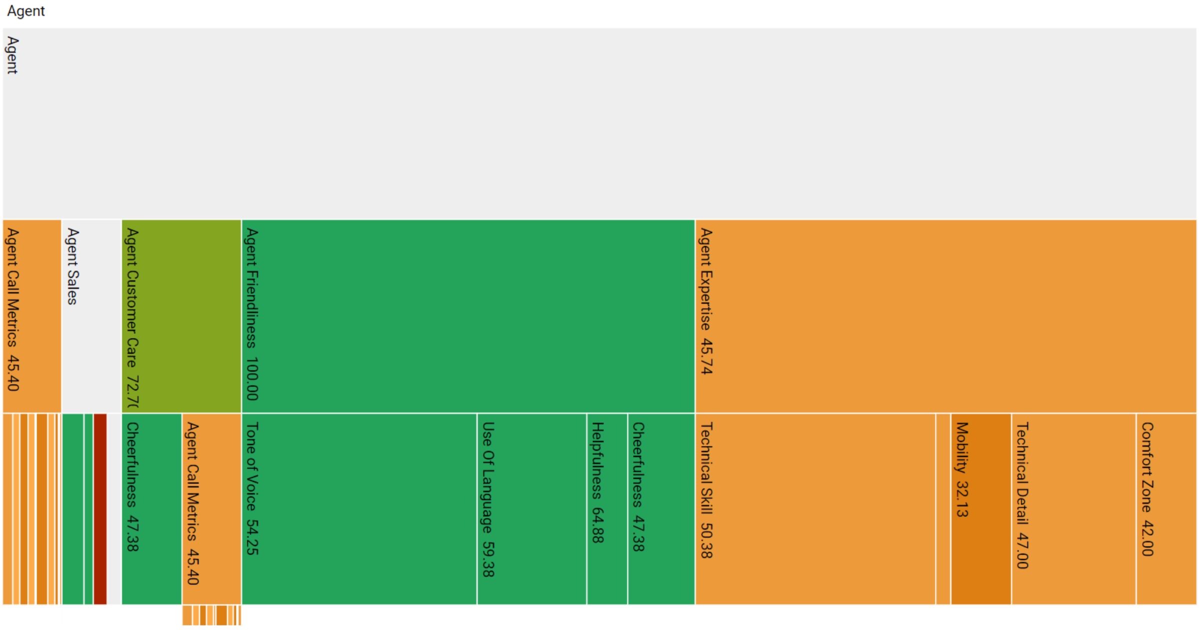


Figure 206:DNA Strands

Clicking on the different parts of the **Strands** will zoom to that node and allow deeper structures to be explored. The colours used are taken from the defined **Thresholds**.

The values shown are the raw scores for the current user aggregated over the selected date window.

25.5.3 Data Issues

Figure 207: Data Warnings

Should there be any issues with the date returned these will be shown in expandable summaries above each **Strand**.

Error! Not a valid filename.

25.6 DNA Comparison

The **DNA Comparison** page allows users to compare aggregated scores across multiple user demographic selections.

25.6.1 Date Range

The data is filtered by a start and end date which can be selected using fixed dates or calculated as rolling dates. Use the button in the top right corner to toggle between the selections.

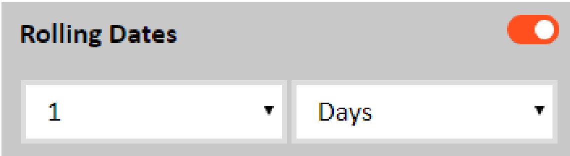


Figure 208: Rolling Days

Rolling dates are calculated from the previous day minus the values selected in the dropdowns.

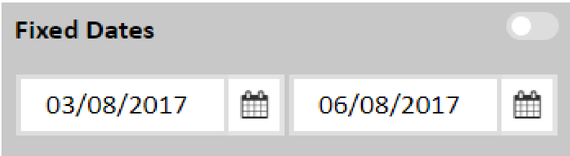


Figure 209: Fixed Dates

25.6.2 Strand Selector

The **Strand** dropdown will allow you to select a single strand for comparison.

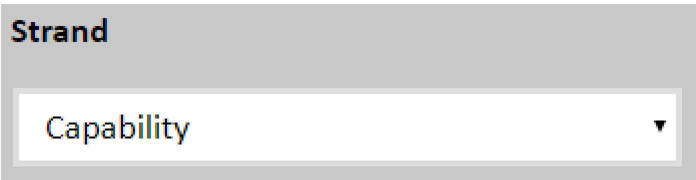


Figure 210: Strand Selection

25.6.3 User Selection

The **User Selection** filter allows a user to select one or more user demographics for comparison. The initial filter displays summary text and a count of any currently selected demographics. Clicking the count button will open a more detailed view of the filter for editing.

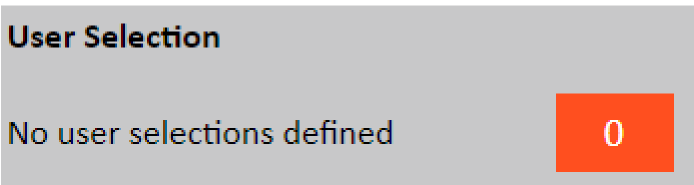


Figure 211: User Selection

The left-hand side of the dialog displays each demographic grouping that can be removed or added to using the **Cross** and **Add User Selection** buttons respectively.

The right-hand side of the dialog displays the currently highlighted demographic grouping. Each grouping consists of a **Percentile Range** and zero or more **Demographic Mappings**.

The **Percentile Range** dropdown allows the users that match the demographic mappings to be filtered to pre-specified or custom ranges. The custom range option will display a range picker allowing the user to select a lower and upper percentage.

The **Demographic Mappings** can be chosen using the dropdown as well as being removed and added to using the **Cross** and **ADD FILTER** button respectively. Any selected values will be displayed at the top followed by the top 20 unselected values. The unselected values can be filtered using the textbox at the top of each result set. Additional data will only be retrieved from the server after 3 or more characters have been inputted into the filter textbox.

25.6.4 Loading and Saving Filters

Filters can be saved and set as a default for future use. A default filter will be automatically loaded when the page loads and only one filter can be set as a default per page. The loading and saving dialogs can accessed by selecting the **LOAD** and **SAVE** buttons.

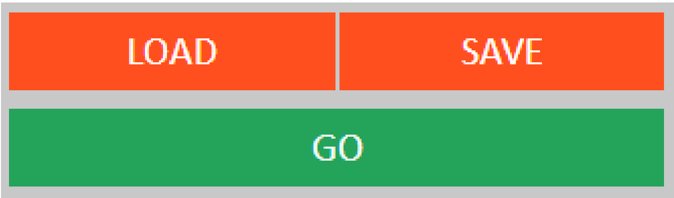


Figure 212: Filter Buttons

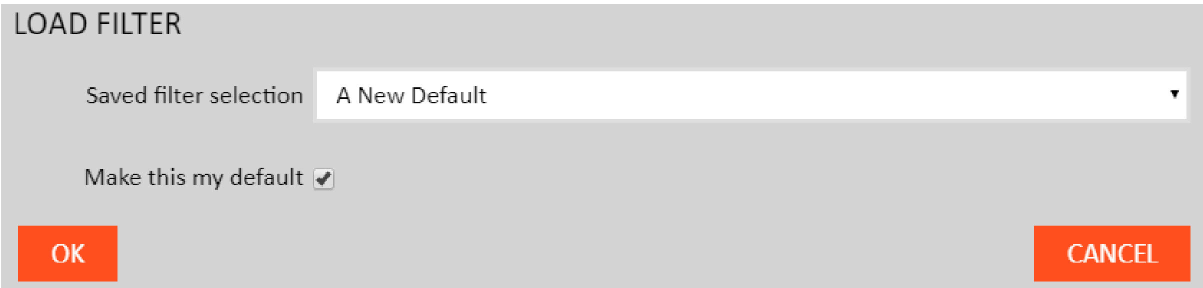


Figure 213: Loading Filter

The **Load Filter** dialog allows a user to select any of their saved filters for the current page. A filter can be loaded by selecting it from the dropdown and clicking the **OK** button. If **Make this my default** is checked then this will also make the selected filter the default for the page.

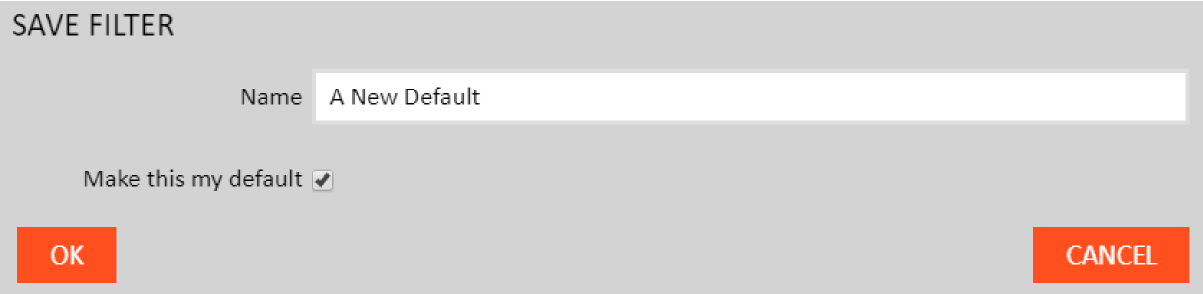


Figure 214: Saving Filter as Default

The **Save Filter** dialog allows a user to save a new filter or edit an existing one. Each filters name must be unique and if a filter with is saved using an existing filters name then it will replace it. If **Make this my default** is checked then this will also make the selected filter the default for the page.

25.6.5 Data Visualisation

The performance data is displayed as a series of partition charts with the selected **Strand** at the top level. Each demographic grouping will produce its own partition chart, with the title representing what percentile range they use, if any, and the demographic selection.

Figure 215: Agent Performance

Clicking on the different parts of the **Strands** will zoom to that node and allow deeper structures to be explored. The colours used are taken from the defined **Thresholds**.

The values shown are the raw scores for the current user aggregated over the selected date window.

The button in the top right-hand corner toggles whether the chart is linked to the other charts. Linked charts will keep the same focus when navigating the **Strands** tree structure.

25.6.6 Data Issues

Should there be any issues with the date returned these will be shown in expandable summaries above each **Strand**.

Figure 216: Data Warning

25.6.7 User Drilldown

On the leaf nodes of the partition chart, there is a grid button that can be pressed to view a more detailed view of the

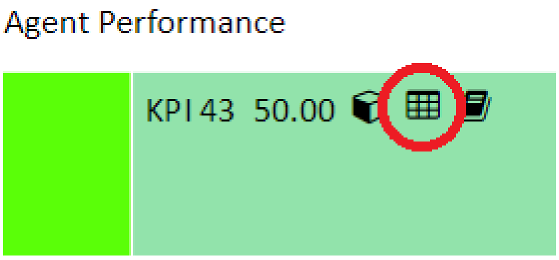


Figure 217: View Data

This will bring up a chart showing the strand name, the date range it applies to and all the users within the **Strand** with their individual warnings and errors, if applicable.

KPI 43, 06/08/2016 - 07/08/2016

CLOSE

Name	Value	Warnings
Aaliyah Ball	50.00	
Aaliyah Barnes	50.00	
Aaliyah Dennis	50.00	
Aaliyah Fox	50.00	
Aaliyah Gibson	50.00	
Aaliyah Griffin	50.00	
Aaliyah Kirk	50.00	
Aaron Allen	50.00	
Aaron Booth	50.00	
Aaron Campbell	50.00	

« ‹ 1 › » 10 items per page 1-10 of 4044 items

Figure 218: Viewing Data

If the node is a **Calculated Component**, it will show the formula used and the components' raw values within the user row.

Capability, 06/08/2016 - 07/08/2016

CLOSE

Calculation used $\frac{\text{KPI 1}}{\text{KPI 10}}$

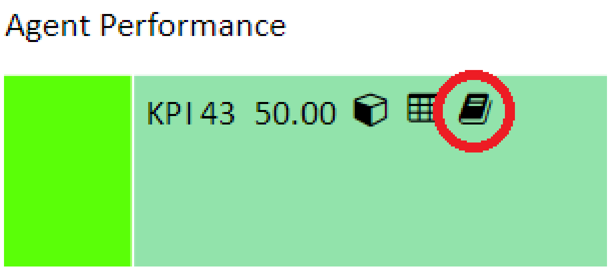
Name	Value	Values used in formula	Warnings
Aaliyah Ball	0.15	KPI 1=7.29 ; KPI 10=50.00	
Aaliyah Barnes	1.53	KPI 1=76.57 ; KPI 10=50.00	
Aaliyah Dennis	2.03	KPI 1=19.61 ; KPI 10=9.66	
Aaliyah Fox	0.14	KPI 1=7.19 ; KPI 10=50.00	

Figure 219: Calculated Data

25.6.8 Learning Item Drilldown

If a node on the partition chart is a **Base Data Definition** or a **Calculated Component**, and has **Learning Items** assigned to it, a book will show up on the chart.

This will bring up a table with a list of all the **Learning Items** assigned to the node, where expanding



allows users to be selected to have them assigned.

Figure 220: Viewing Attached Learning Items

Percentile Range:(All Users), State:(AK, AL)

Agent Performance

KPI 43

CLOSE

	Learning Item
+	Compliance Reminder (524 Core, 0 Extended, 0 Recommended)
+	Course Tips (0 Core, 0 Extended, 524 Recommended)

« ‹ 1 › » 10 items per page 1-2 of 2 items

Assignment Date From Assignment Date To ASSIGN

Figure 221: Attached Learning Items

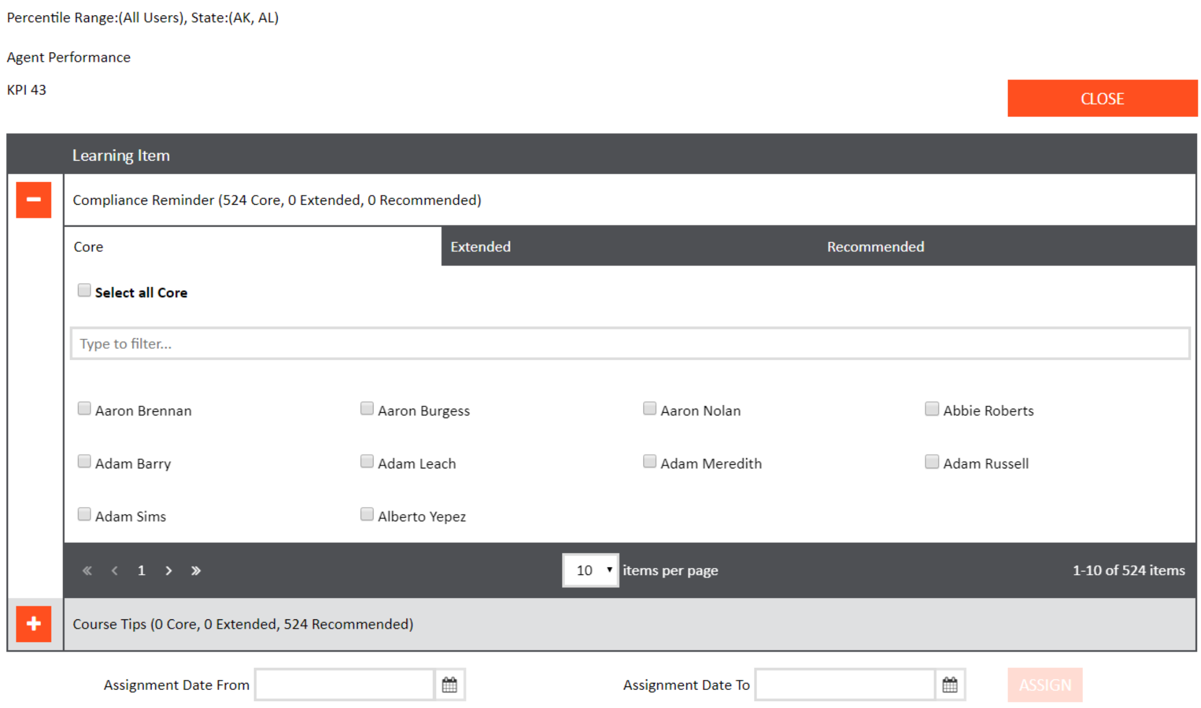


Figure 222: Learning Item recommendations

They are sorted into three categories based on how they score relative to the minimum and maximum bounds set when relating learning items to the BDD or calculated component:

- **Core** contains users who score above the maximum.
- **Extended** contains users who score under the minimum.
- **Recommended** contains users who score within the range.

The users in each tab can be filtered using the filter bar, and it is possible to select them all within their respective tab by using the select all checkboxes. All users show up in these tabs based on their scores regardless of whether they have the learning item already assigned or not, unchecked.

The dates can be set if required, but can be left blank.

Assigning these uses pushes the assignments to be queued where it will be processed the next time the “Process Learning Items Queue” **Scheduled Task** runs. If a user already has the learning item assigned, re-assigning will update the date range, or if nothing has changed, not do anything.

25.7 DNA User Progress Graph

The **DNA User Progress Graph** provides a visual representation of up to ten users’ performance over time and any learning items they may have taken in that time.

25.7.1 Date Range

The data is filtered by a start and end date which can be selected using fixed dates or calculated as rolling dates. Use the button in the top right corner to toggle between the selections.

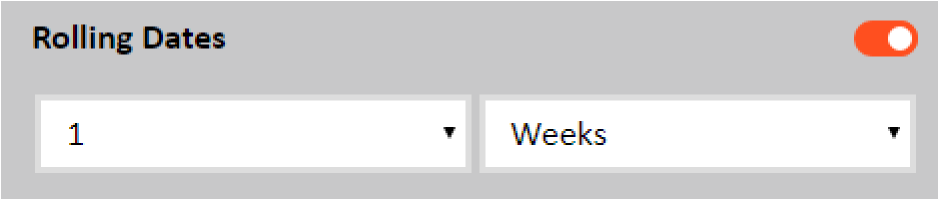


Figure 223: Rolling Week Range

Rolling dates are calculated from the previous day minus the values selected in the dropdowns.

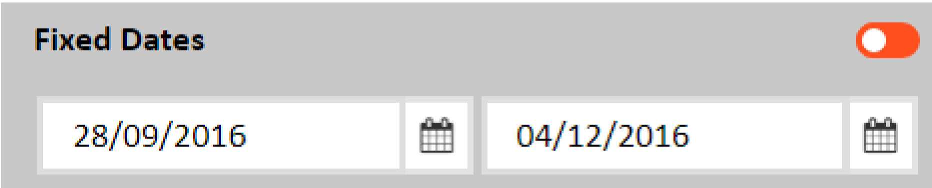


Figure 224: Selected Dates

25.7.2 Data Type

The **Data Type** selector allows a user to select what kind of data they want to see (**Base Data Definition**, **Strand** or **Calculated Data**) and select from a list of those.

Figure 225: Data Selection

25.7.3 Users

The **Uses** selection filter allows up to ten users to be selected out of all the users in the system. Users can be filtered by their first name, surname and login Id.

25.7.4 Loading and Saving Filters

Filters can be saved and set as a default for future use. A default filter will be automatically loaded when the page loads and only one filter can be set as a default per page. The loading and saving dialogs can accessed by selecting the **LOAD** and **SAVE** buttons.

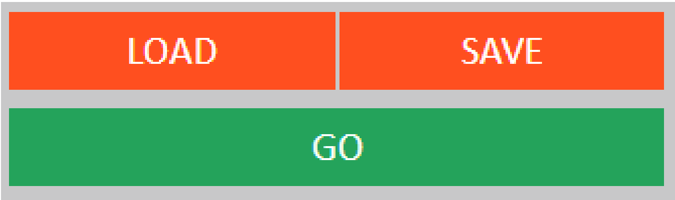


Figure 226: Filter Buttons

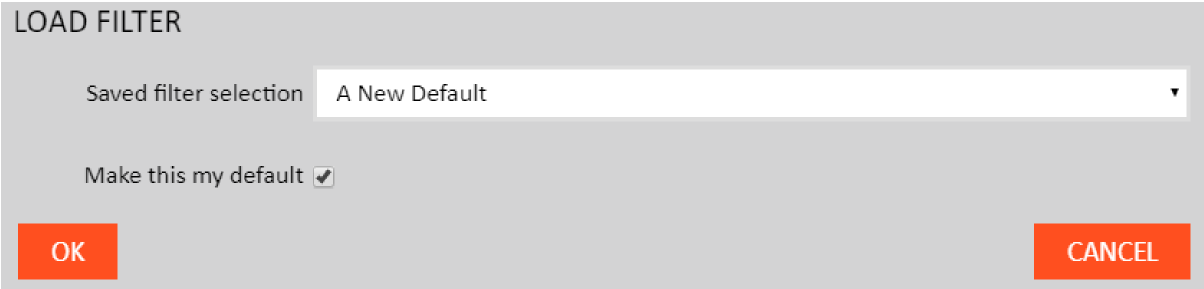


Figure 227: Loading Filter

The **Load Filter** dialog allows a user to select any of their saved filters for the current page. A filter can be loaded by selecting it from the dropdown and clicking the **OK** button. If **Make this my default** is checked then this will also make the selected filter the default for the page.

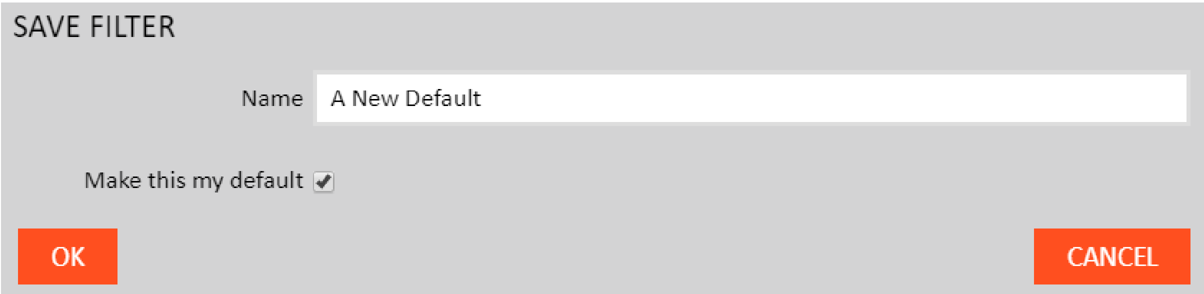


Figure 228: Saving Filters

The **Save Filter** dialog allows a user to save a new filter or edit an existing one. Each filters name must be unique and if a filter with is saved using an existing filters name then it will replace it. If **Make this my default** is checked then this will also make the selected filter the default for the page.

25.7.5 The Timeseries Graph

Figure 229: User Progress

The timeseries graph shows the scores of the users selected, with their colours represented in the Users legend below it and learning items shown on the line, with the shapes corresponding to the Learning Items legend. The threshold is overlaid and shows which bands were active at the times on the graph.

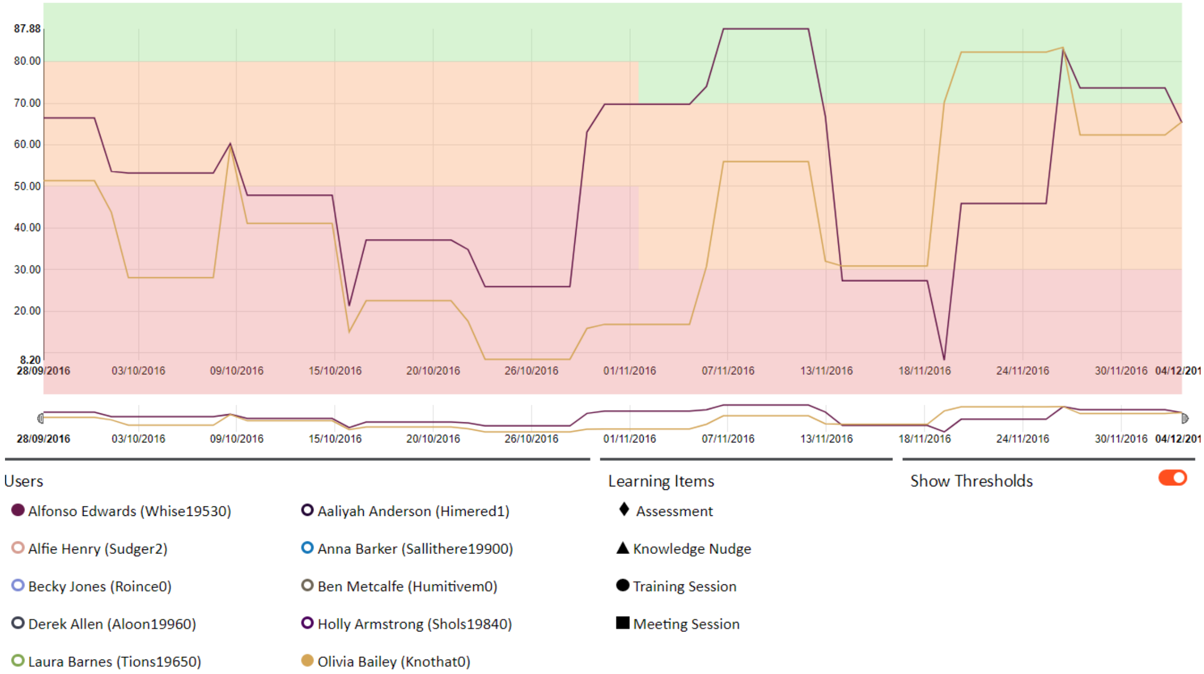


Figure 230: Selected Users Progress

Users can be deselected by clicking on the round dot next to their name, so smaller selections can be compared without separate searches.

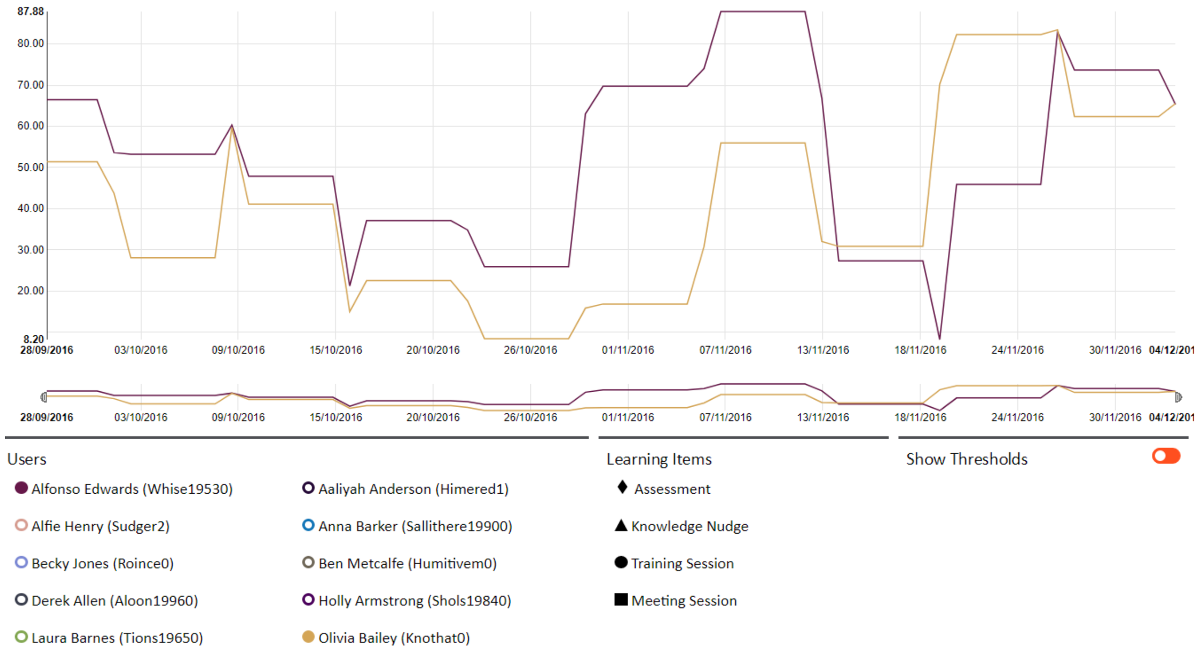


Figure 231: Thresholds toggled off

Thresholds can be toggled on or off using the “Show Thresholds” toggle under the bar.

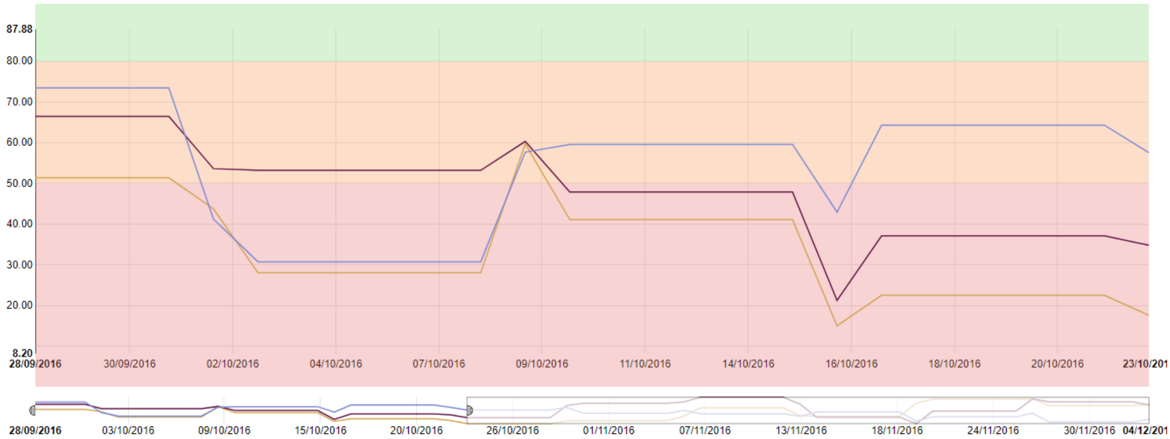


Figure 232: Focused Timeline

A smaller time frame can also be selected by dragging the tabs at the ends of the mini graph below the main one, allowing for zooming in to times of interest.

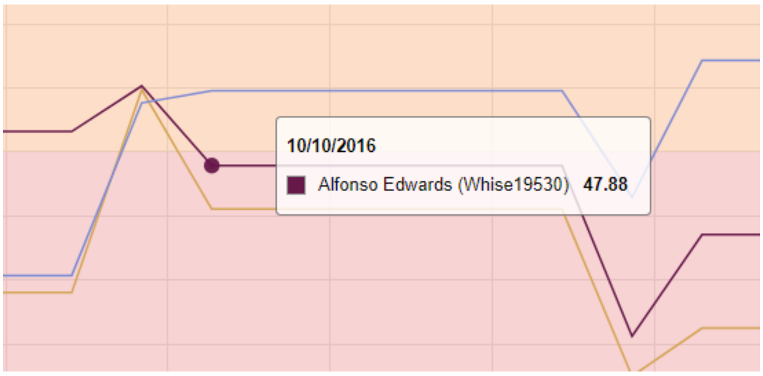


Figure 233: Base Data values

Hovering over the line also gives specific information on whose line it is, their score, and the date the score was taken.

25.8 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 and must be selected before continuing. Select a template from the dropdown or create a new one by clicking the **New**

Template button.

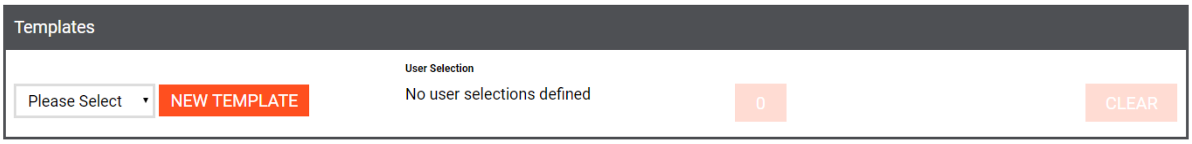


Figure 234: Skills Routing

The user selection becomes enabled once a template has been selected. If no user selection is defined then users who are linked to the selected Strands will be used.

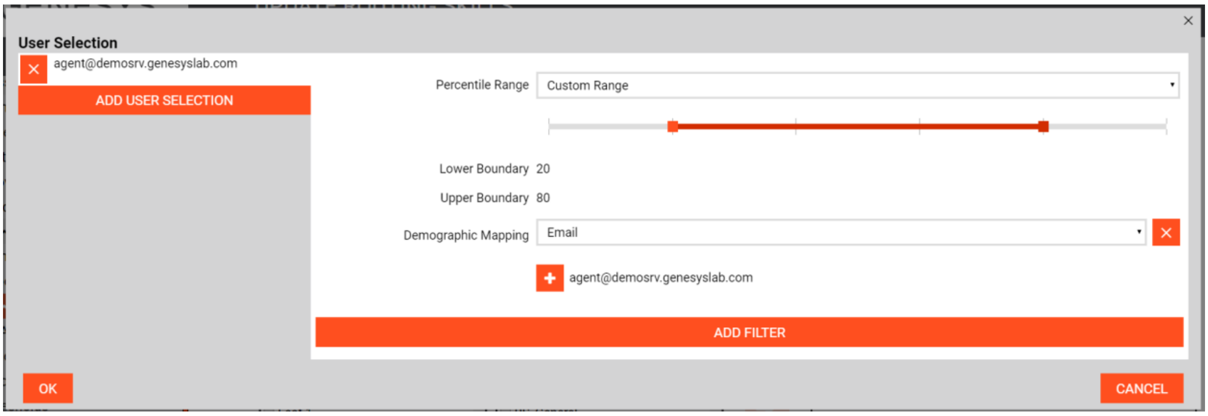


Figure 235: Skills Routing Template

Clicking on the user selection count button will launch the user selection modal. The left-hand side of the dialog displays each demographic grouping that can be removed or added to using the **Cross** and **Add User Selection** buttons respectively.

The right-hand side of the dialog displays the currently highlighted demographic grouping. Each grouping consists of a **Percentile Range** and zero or more **Demographic Mappings**.

The **Percentile Range** dropdown allows the users that match the demographic mappings to be filtered to pre-specified or custom ranges. The custom range option will display a range picker allowing the user to select a lower and upper percentage.

The **Demographic Mappings** can be chosen using the dropdown as well as being removed and added to using the **Cross** and **ADD FILTER** button respectively. Any selected values will be displayed at the top followed by the top 20 unselected values. The unselected values can be filtered using the textbox at the top of each result set. Additional data will only be retrieved from the server after 3 or more characters have been inputted into the filter textbox.

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.

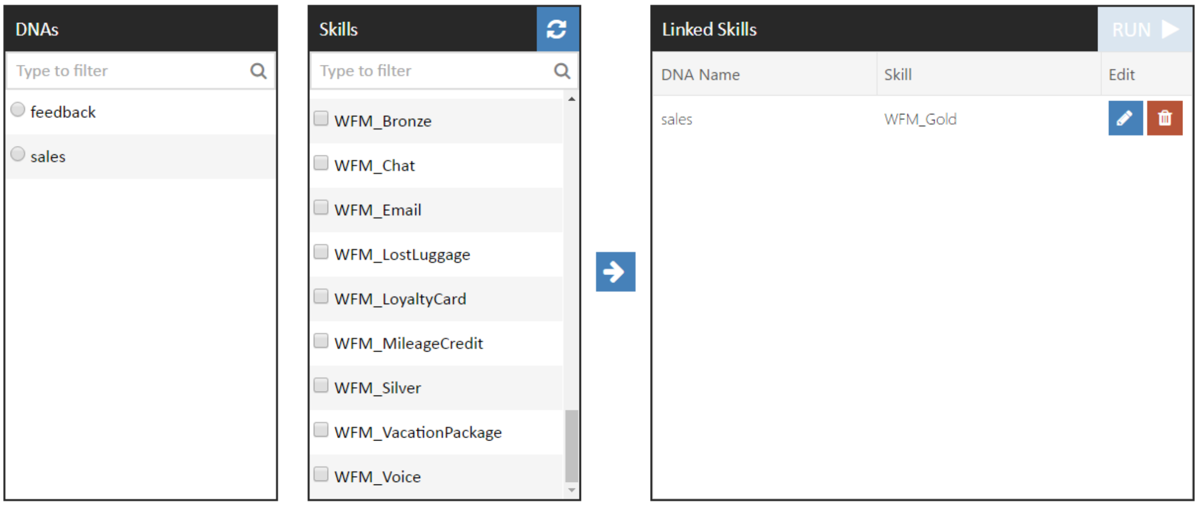


Figure 236: Linking DNA components and CME skills

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**.

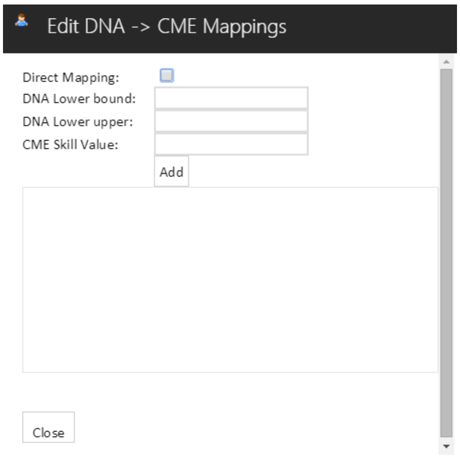


Figure 237: Setting skill link properties

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**.

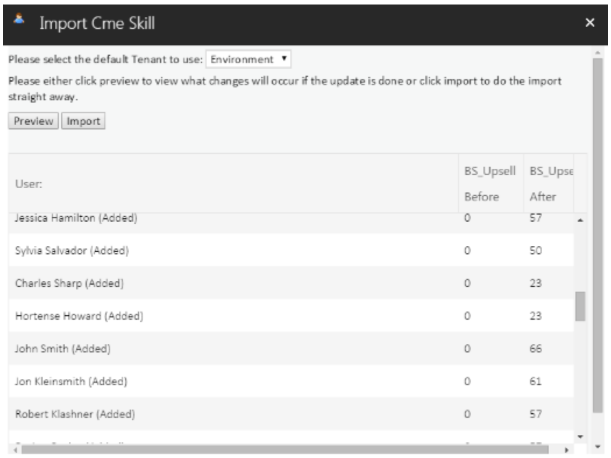


Figure 238: Previewing the CME skill levels

26 Branding

26.1 Branding Options

The branding settings allow customisation of the look and feel of the system so they can better match company branding.

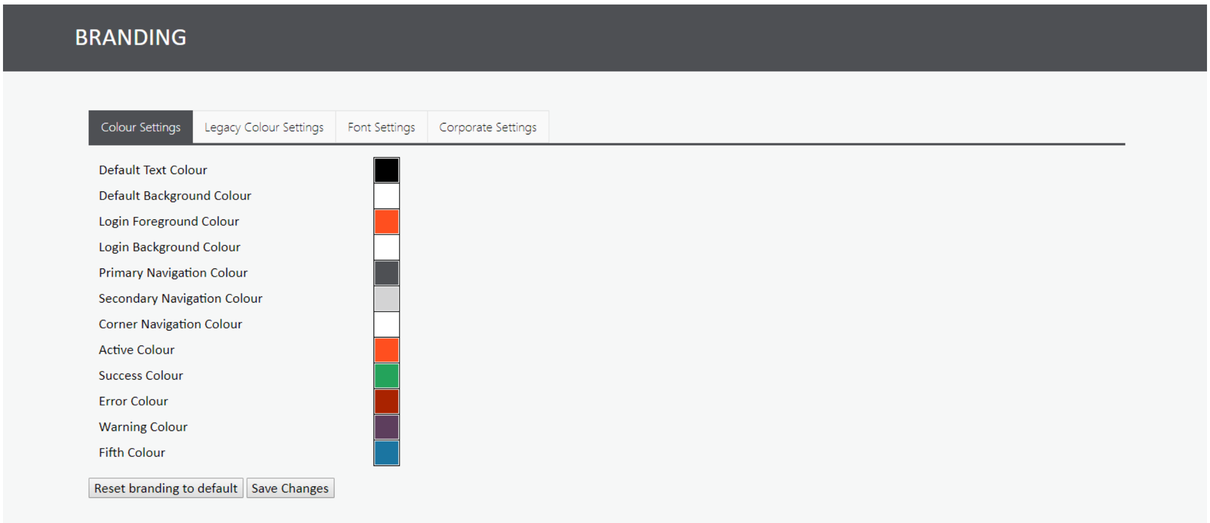


Figure 239: Branding Settings

The four tabs are split between colour, font and corporate branding settings. Colour settings are defined on the first tab.

The following options are available:

Default Text Colour: The standard colour used for most text in the application.

Default Background Colour: Changes the colour of some grids in the application.

Login Foreground Colour: Changes the colour of text displayed on the login page.

Login Background Colour: Changes the colour of the login box.

Primary Navigation Colour: Changes the colour of menu and page headers.

Secondary Navigation Colour: Changes the colour of the menu sub items.

Corner Navigation Colour: Changes the colour of the logo section of the menu.

Active Colour: Changes the colour of the currently selected item. Is also used for most buttons.

Success Colour: Changes of the colour of messages that indicate success and some submit type buttons.

Error Colour: Changes the colour of messages and highlights that indicate an error. Also used for some buttons such as Revert.

Warning Colour: Changes the colour of messages and highlights that indicate a warning state.

Fifth Colour: A colour used where additional colours are required. (I.e. on screens with many buttons or status indicators)

A very small number of colour controls are available in the legacy branding tab but these are being deprecated incrementally in each new version of the product.

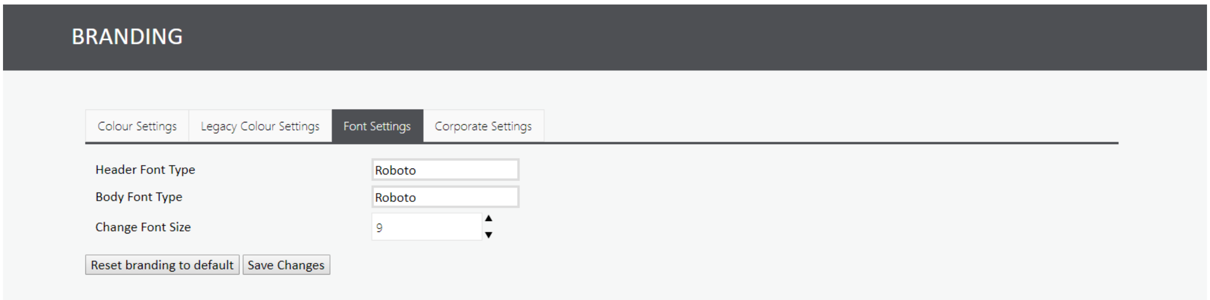


Figure 240: Branding Font

The font and sizing can be selected on the font settings tab. The font chosen needs to be available on the client machines otherwise it will be substituted for an available font.

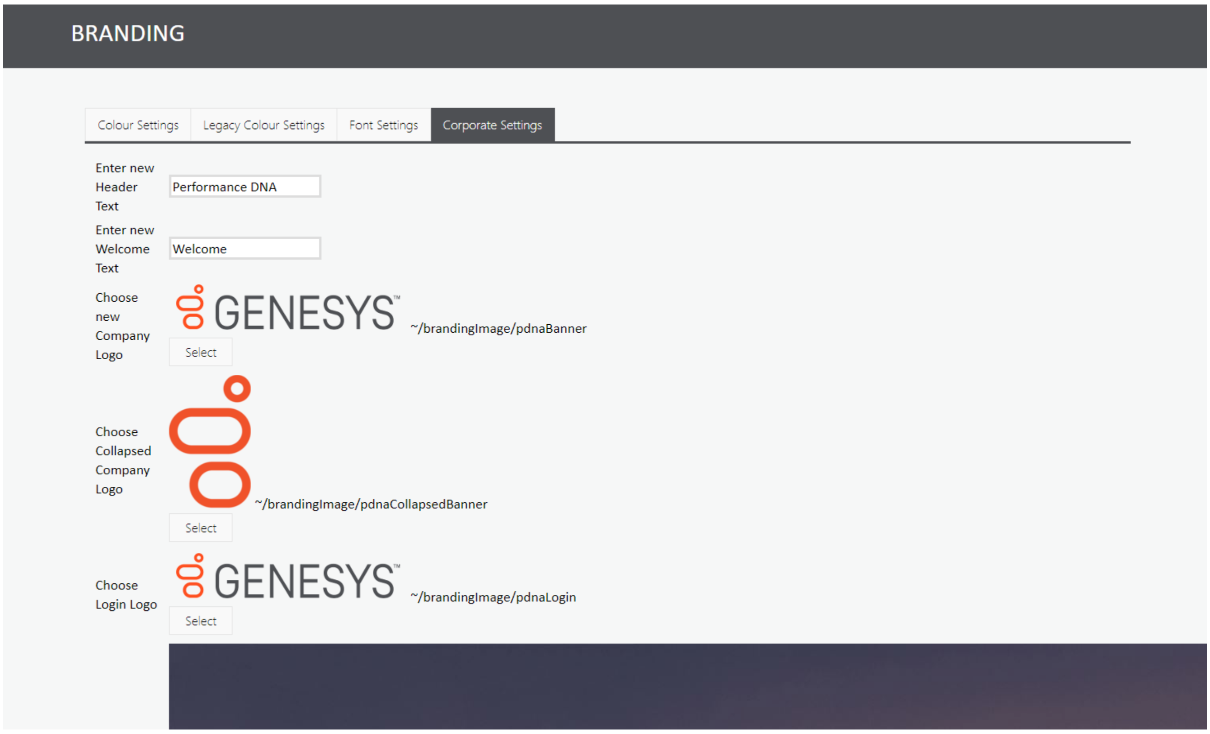


Figure 241: Corporate Logos

The corporate branding tab allows the user to specify company logos for the menu and login screen. In addition, a background image can be selected to provide a branded backdrop when logging in.

Enter new Header Text: Text displayed on the login page.

Enter new Welcome Text: Optional text.

Choose new Company Logo: A logo for display in the menu when the menu is expanded.

Choose Collapsed Company Logo: The logo displayed in the menu when the menu is collapsed.

Choose Background Image: An image for display on the Login page. (Ensure the image is of a sufficient resolution for full screen display to ensure you retain a high quality image.)

26.2 Setting Branding

To set branding select the desired options and save before exiting each tab.

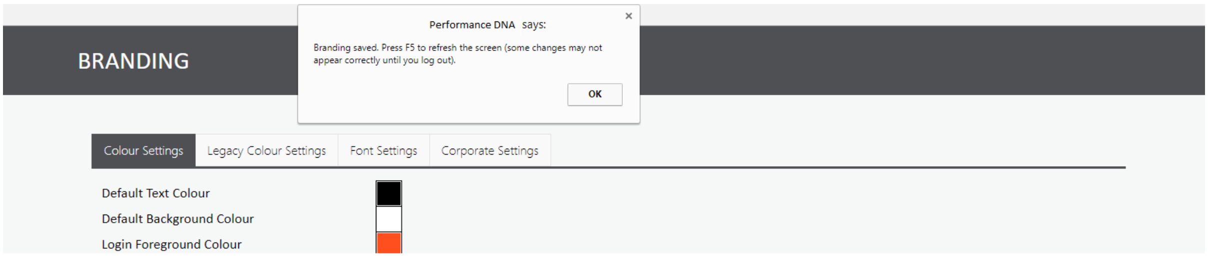


Figure 242: Saving Settings

A dialog appears to indicate that the changes have been saved. A page refresh is sometimes required. For some changes the user needs to logout and log back in again.

26.3 Restore Branding to Defaults

Each tab contains a button for resetting branding.

Figure 243: Restoring Branding to Default

Clicking the Reset option will revert all branding back to the default branding that the product was installed with. **Note: This resets all branding across the entire application not just the branding of the tab the user is on.**

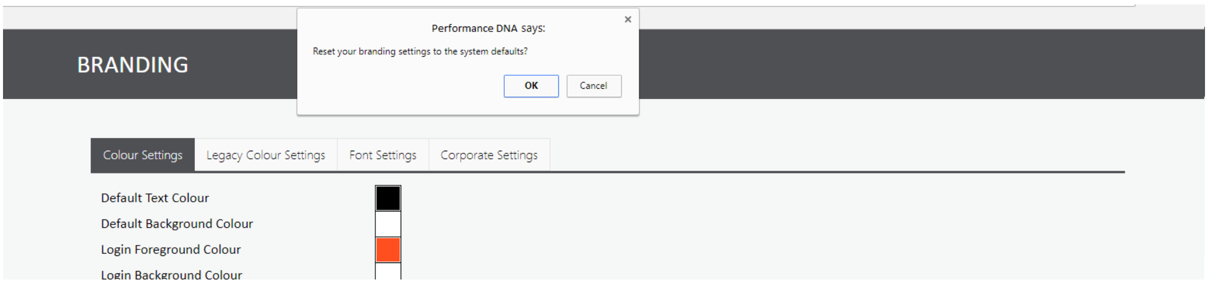


Figure 244: Branding Rest Confirmation

The user has a final option to cancel the action. Click OK to confirm the reset or cancel to abandon the action.

27 SkillsAnalysis

The 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.

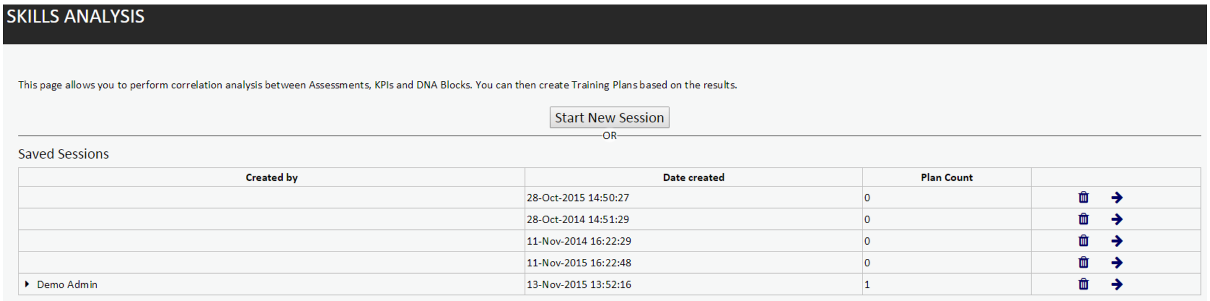


Figure 245: Skills Analysis Page

To begin a new Session, follow the following steps:

1. **Choose items to Analyse**.

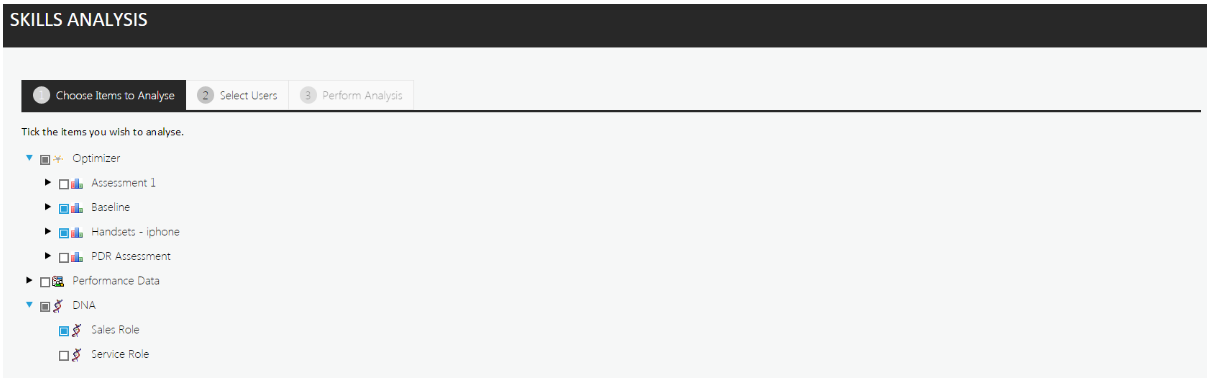


Figure 246: Choose items to analyse

- Performance DNA – Assessment data
- Performance Data – DNA Bae Data / KPI
- DNA – DNA Strands or DNA Sequences

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 247: Select users

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

Figure 248: Data analysis

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

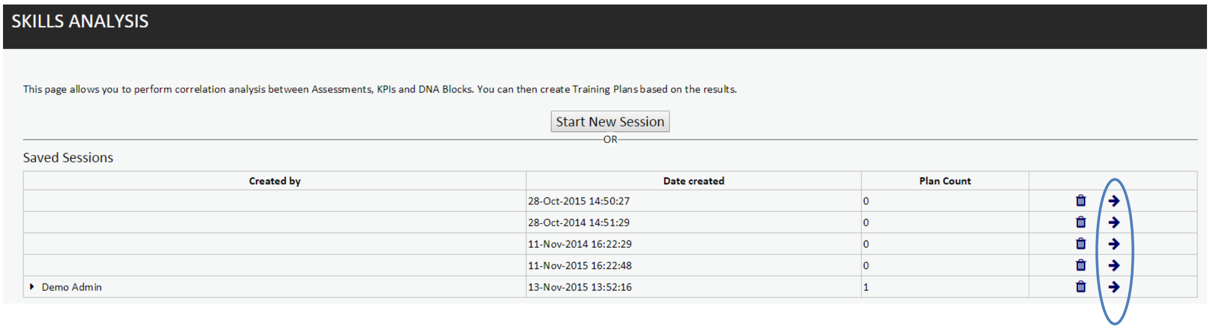


Figure 249: Data analysis

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.

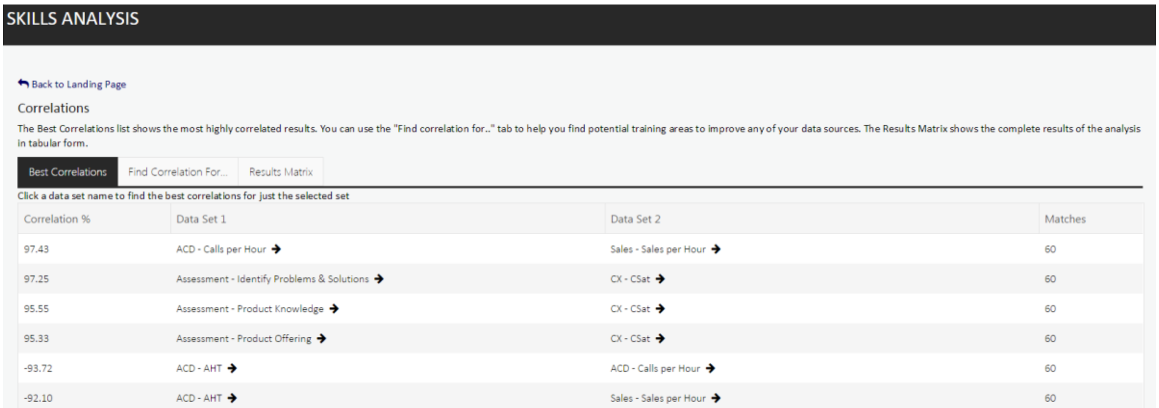


Figure 250: Analysis results

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.

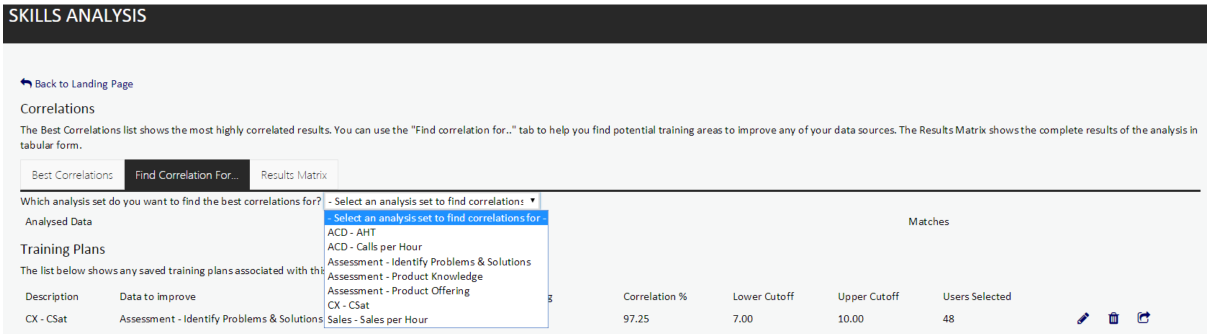
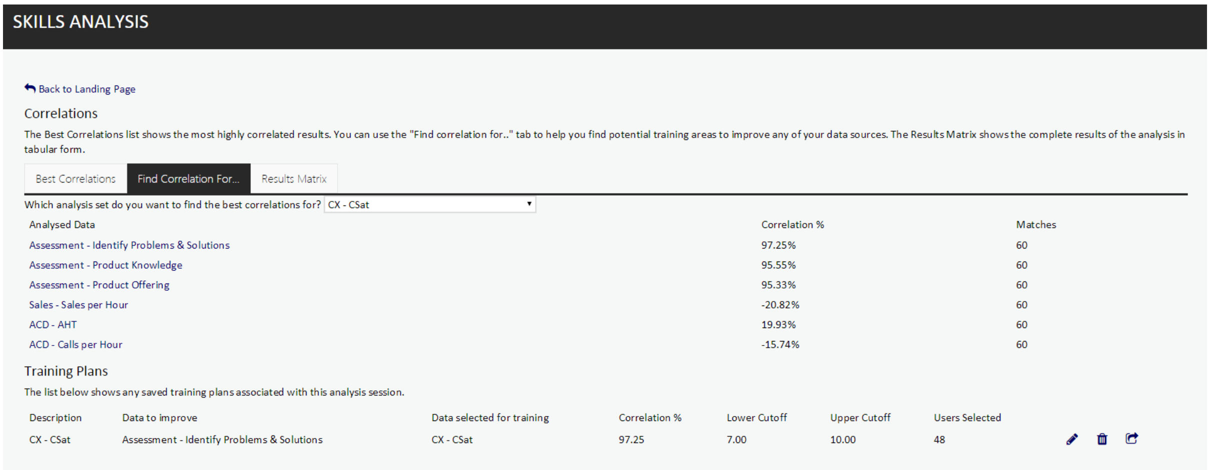


Figure 251: Viewing correlation results for a specific data set

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



SKILLS ANALYSIS

Back to Landing Page

Correlations

The Best Correlations list shows the most highly correlated results. You can use the "Find correlation for.." tab to help you find potential training areas to improve any of your data sources. The Results Matrix shows the complete results of the analysis in tabular form.

Best Correlations | Find Correlation For... | Results Matrix

Which analysis set do you want to find the best correlations for? CX - CSat

Analysed Data	Correlation %	Matches
Assessment - Identify Problems & Solutions	97.25%	60
Assessment - Product Knowledge	95.55%	60
Assessment - Product Offering	95.33%	60
Sales - Sales per Hour	-20.82%	60
ACD - AHT	19.93%	60
ACD - Calls per Hour	-15.74%	60

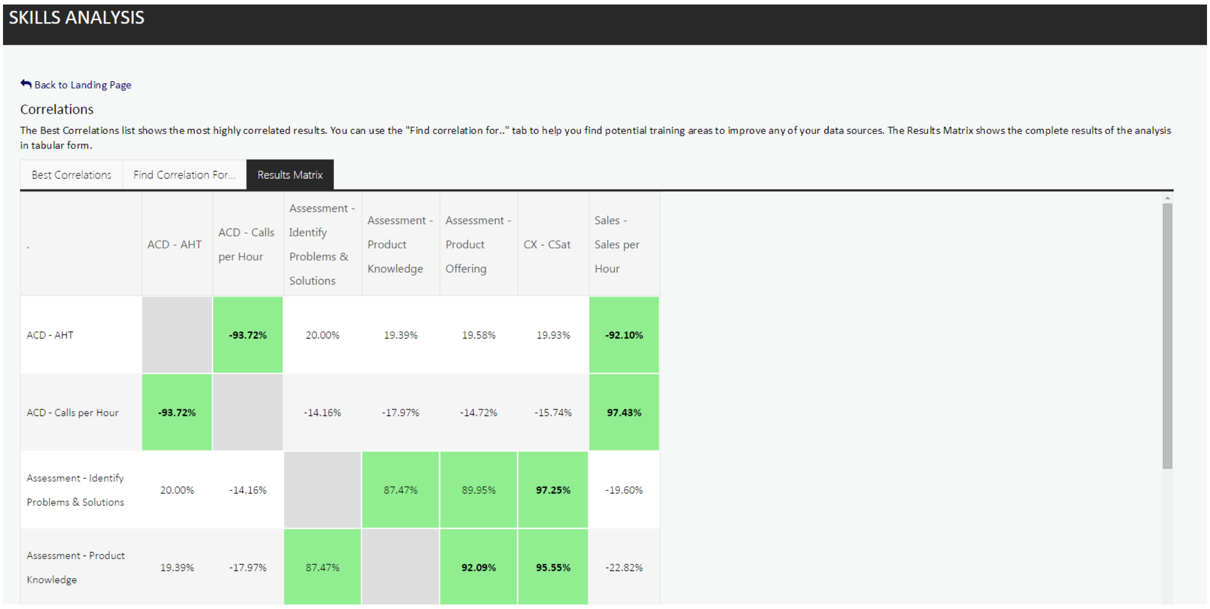
Training Plans

The list below shows any saved training plans associated with this analysis session.

Description	Data to improve	Data selected for training	Correlation %	Lower Cutoff	Upper Cutoff	Users Selected
CX - CSat	Assessment - Identify Problems & Solutions	CX - CSat	97.25	7.00	10.00	48

Figure 252: 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.



SKILLS ANALYSIS

Back to Landing Page

Correlations

The Best Correlations list shows the most highly correlated results. You can use the "Find correlation for.." tab to help you find potential training areas to improve any of your data sources. The Results Matrix shows the complete results of the analysis in tabular form.

Best Correlations | Find Correlation For... | Results Matrix

.	ACD - AHT	ACD - Calls per Hour	Assessment - Identify Problems & Solutions	Assessment - Product Knowledge	Assessment - Product Offering	CX - CSat	Sales - Sales per Hour
ACD - AHT		-93.72%	20.00%	19.39%	19.58%	19.93%	-92.10%
ACD - Calls per Hour	-93.72%		-14.16%	-17.97%	-14.72%	-15.74%	97.43%
Assessment - Identify Problems & Solutions	20.00%	-14.16%		87.47%	89.95%	97.25%	-19.60%
Assessment - Product Knowledge	19.39%	-17.97%	87.47%		92.09%	95.55%	-22.82%

Figure 253: 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.

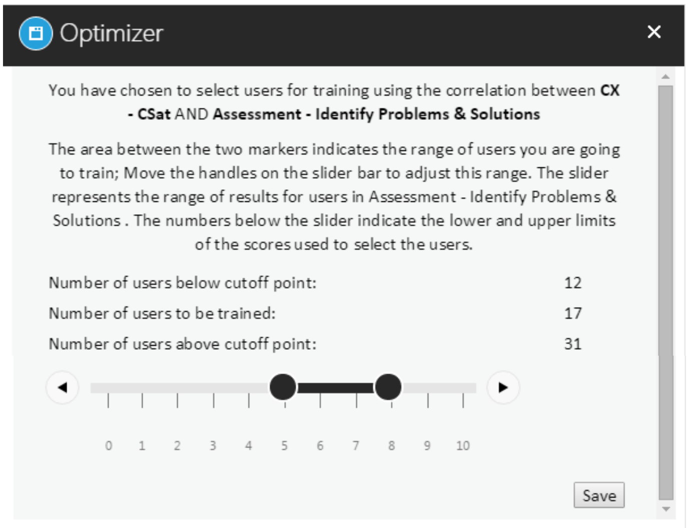
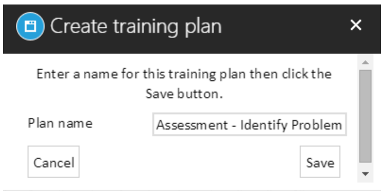


Figure 254: Selecting users for training based on results

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 255: Saving the training plan

28 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.

28.1 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

28.2 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.

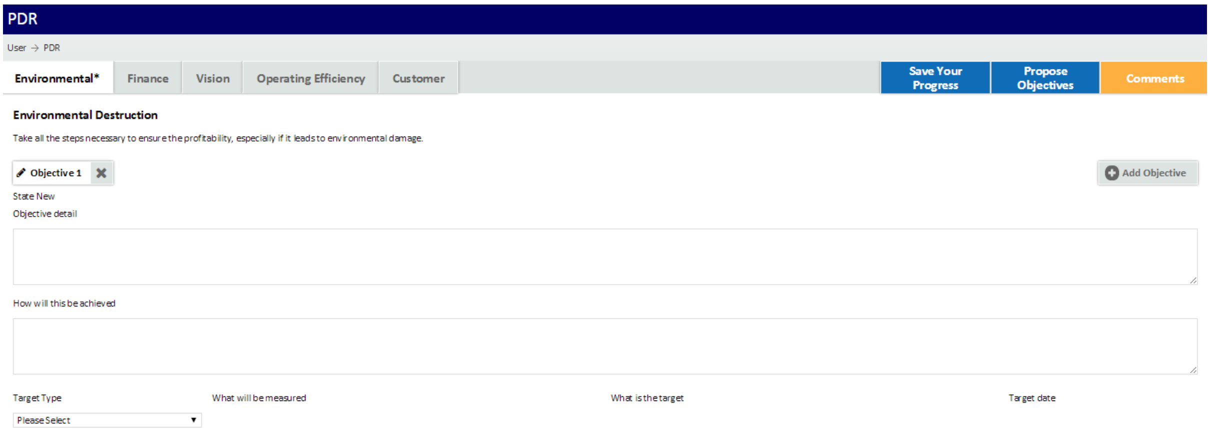


Figure 256: Creating objectives

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 Base Data 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.

28.3 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.

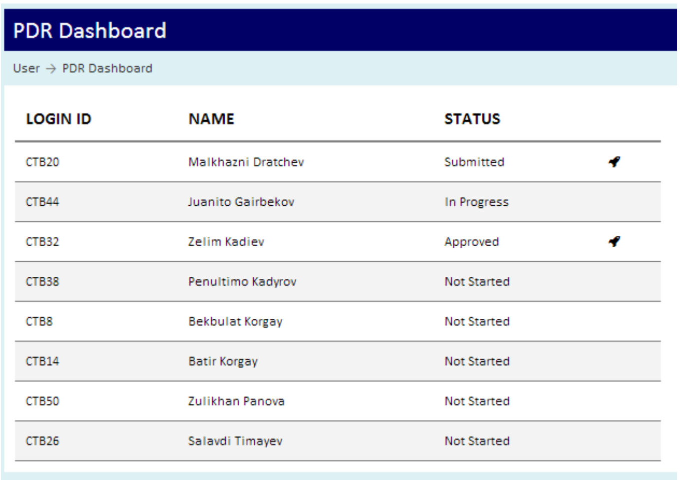


Figure 257: PDR Dashboard

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.

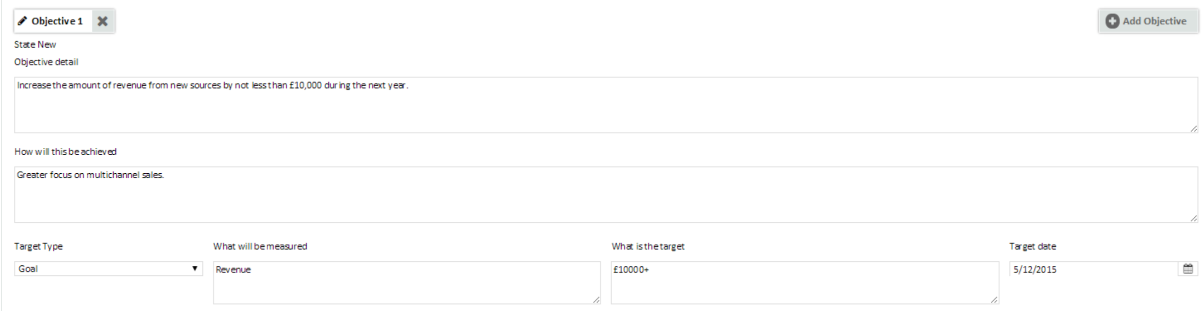


Figure 258: Creating an objective

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 259: Adding comments and evidence file uploads

28.3.1 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.

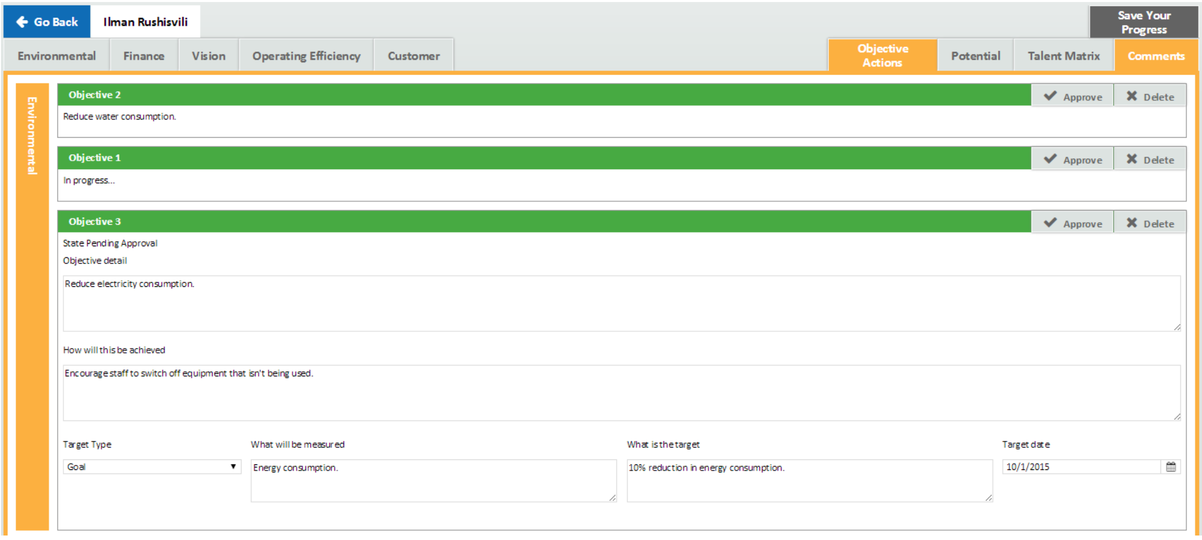


Figure 260: Objective actions screen

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.

28.3.1.1 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.

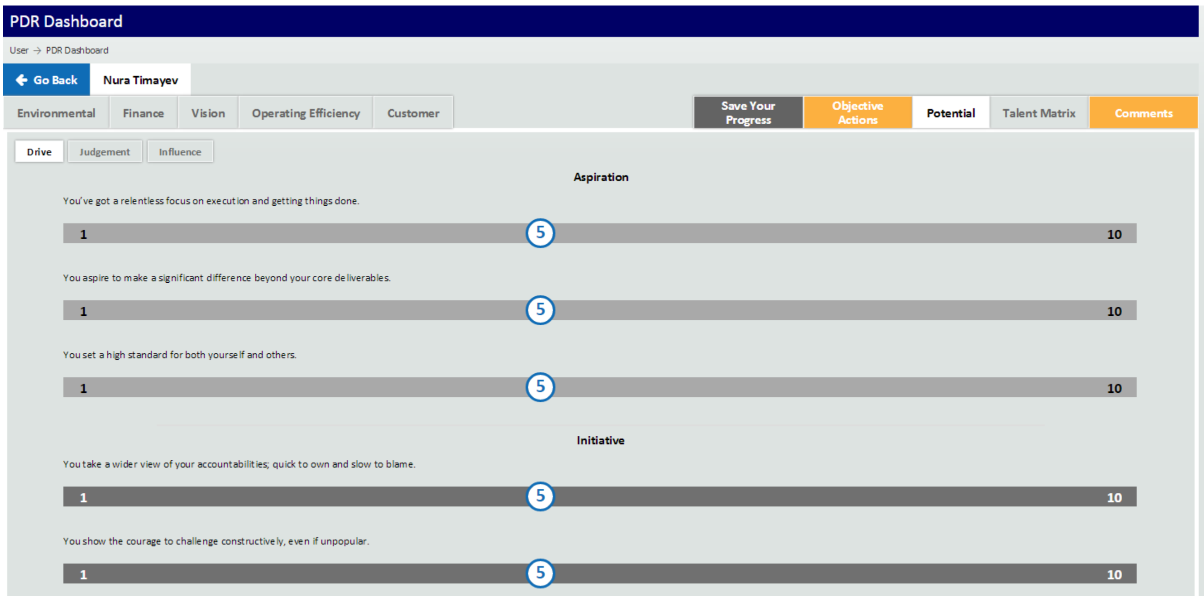


Figure 261: Potential tab

28.3.1.2 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.

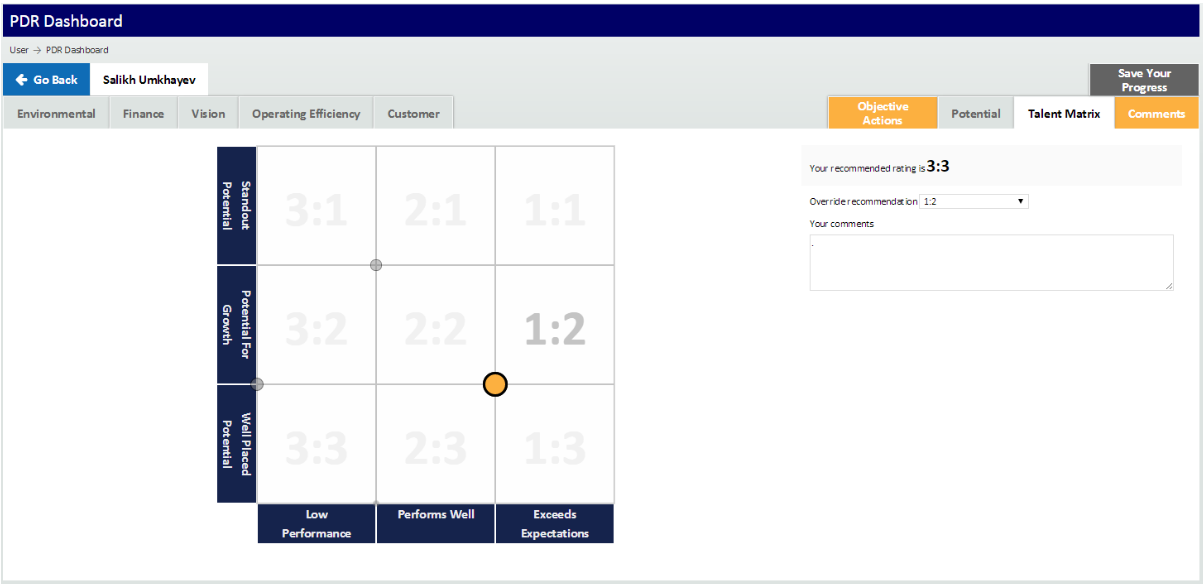


Figure 262: Talent Matrix tab

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.

28.4 PDR Admin Page

28.4.1 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.

28.4.2 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.

28.4.3 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.

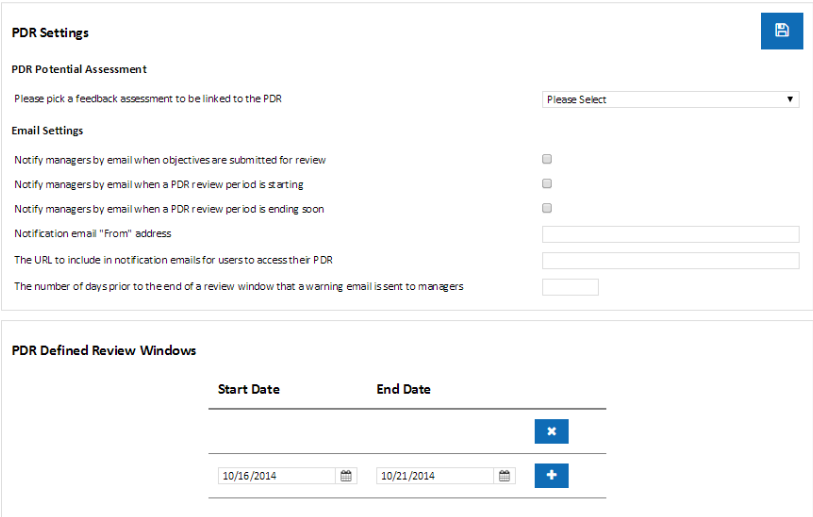


Figure 263: PDR Admin Page Settings

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.

28.5 Feature notes

28.5.1 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 Performance DNA users.

29 Appendix 1: Optional components

Performance DNA includes several additional components that provide the ability to:

- Automatically import DNA KPI data via the **DNA Import Service.**
- 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.

29.1 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 Performance DNA 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 Performance DNA **Manage KPI** page.

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

29.2 LMS Learning Item Integration

The LMS learning item integration feature allows Performance DNA administrators to assign Performance DNA 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 Strands 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).

29.3 Configuring GIS Authentication

In Performance DNA, 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.

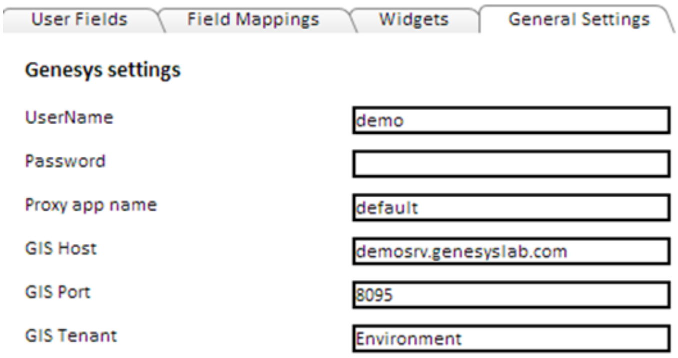


Figure 264: GIS Settings

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 Performance DNA 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

Figure 265: GIS Server Details

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.