

Skills Management 9.0.0

Performance DNA Manager User 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.

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.

GENESYS [™] Welcome		
Login ID		
Password		
LOG IN		
? Trouble logging in		
Performance DNA Version 9.0.0.10910. US Patent #8589215. AUS Patent #2012282230. Other patents pending. Copyright © 2017 Silver Lining Solutions. All Rights Reserved.		

Figure 1 Log on screen

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

<mark>ଟ୍</mark> ଚ GENESYS [™]	MY DEVELOPMENT		
× +		All Assignment Types Not Archived	
My Development	🗗 Selling Skills		ď
My DNA My Certificates	Customer Service Excellence MC		ď
PDR PDR Dashboard	Compliance Assessment		ď
Change Time Zone Change Password	🛱 Handsets - iphone		ď
	AHT Tips		ď
↓ DNA → BOOKING REQUESTS	« < 1 > »	10 🔹 items per page	1-5 of 5 items
CALENDARS			
SYSTEM			
LOGOUT - ADMIN			



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

2 Taking an Assessment

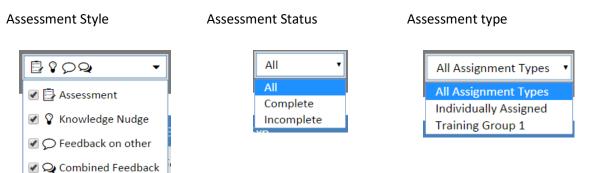
Any assessments that have been assigned will be visible under My Development page.

C	B GENESYS [®]	MY DEVELOPMENT		
×	÷		All Assignment Types Not Archived	
	USER My Development	Selling Skills		C.
	My DNA My Certificates PDR	Customer Service Excellence	MC	ď
	PDR Dashboard Change Time Zone	Compliance Assessment		C
	Change Password	🔁 Handsets - iphone		C.
I.	REPORTING	Ŷ AHT Tips		C
~	BOOKING REQUESTS	« < 1 > »	10 • items per page	1-5 of 5 items
Ê	CALENDARS			
ය : ()	SYSTEM LOGOUT - ADMIN			

Figure 3: Assessments on the My Development Screen

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

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



Assessment Style:

- Assessment Standard Assessments are typically used as a knowledge check to assess the users understanding of a specific subject.
- Knowledge Nudge This is a piece of learning that has been assigned to the user. This can be in the form of an e-learning course, document, referal to a web site or knowledge base.
- Feedback on others This is used when requesting feed back on peers and is typically used for 360° feedback reviews.

• Combinde Feedback – this is typically used for employee review periods / 1-2-1's and requires both the Agent and Manager scores, which form the basis for the review conversation. Once the scores have been agreed and signed by both parties the final ratings are recorded.

Assessment Types

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

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

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

00	MY DEVELOPMENT		
	D C C C + All + All Assignment Types + Not Archived +		
ර 🔅 🖩 🐻 🎝 🔽 🚺	Identifying Problems Customer Service Excellence MC		(2 (2)(0/2018) (2)(0/2018)
			675)
Ф°	Compliance Assessment		ď
0	🗗 Handsets - Iphone		C
	♀ AHT Tips D Selling Skills		ď
	La Setting Skins		(R) (68)
	« < 1 > »	10 • Items per page	1-6 of 6 items

Figure 4: Assessment with dates

Once started an Assessment will display a completion icon and the percentage completed so far. The below example shows that the Customer Service Excellence MC Assessment is 67% complete.

	inguice 3. Assessment completion	
MY DEVELOPMENT		
🗗 🗘 🖓 🗢 🔹 All 🔹 All Assignme	nt Types • Not Archived •	
Identifying Problems		G
MY DEVELOPMENT		
Customer Service Excellence MC		28/02/2018
		(67%)
Compliance Assessment		C
Handsets - iphone		C
♀ AHT Tips		C
Selling Skills		
« < 1 > »	10 • Items per page	1-6 of 6 item
Knowledge Nudge		
Please View Before Accessing the Test		
VIEW KNOWLEDGE NUDGE		
You have been assigned a Knowledge Nudge to v	ew with the Assessment. You must open the nudge before you continue.	
		START
ASA AND AND AND AND AND AND AND AND AND AN		Night 1 1
		No.

Figure 5: Assessment Completion

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

Figure 6: Launching an Assessment

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

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



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



Figure 8: Time Assessment information



Figure 9: Question time recorded

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

ASSESSMENT01 LATEST EXP			
ፍ ፳ ፬ 🕲			
You may only go forward through this assessment Please note that you must answer all questions in this assessment in the set order. You may not go back to answer any questions which you have skipped over.			

Figure 10: Forward only navigation.

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

Ŷ	Knowledge Nudge Please View Before Accessing the Test		
	VIEW KNOWLEDGE NUDGE	e Nudge to view with the Assessment. You must open the nudge before you continue.	

Figure 11: Knowledge Nudge Information.

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

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

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

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

3 Types of Assessments

There are three types of assessments:

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

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

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

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

3.1 Timed and Untimed Assessments

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

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

© 🔅 🖩 🖶 🎝 🔊 🖿 이 00	MY DEVELOPMENT	
	C C C All All All Assignment Types • Not Archived •	
C C	D Identifying Problems	C.
¢ ■		28/02/2018
	Customer Service Excellence MC	8
		67%
ଦ୍	Compliance Assessment	C'
	ŶAHT Tips	_ C
	🛱 Selling Skills	
	< < 1 > > 10 • Items per page	1-6 of 6 items

Figure 12: List of assessments

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

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

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

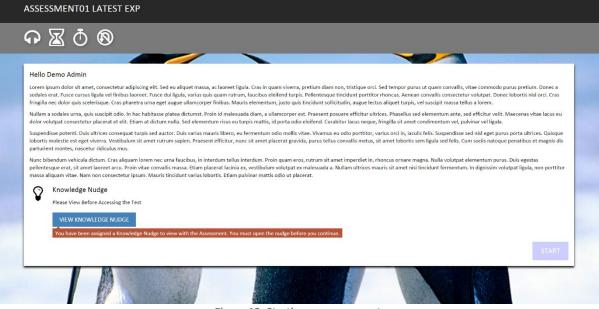


Figure 13: Starting an assessment

3.2 Question Examples

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

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



Figure 14: The Navigator

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

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

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

Each question may also contain additional content such as:

- A link to a website
- An image
- A video clip

Multiple Choice

QUESTION TYPES				
	PREV 1 2 3 4 5 6 7 NEXT			
置 Time remaining: 10:01				
This is an example of a Multiple choice question. Which day of the week begins with W?				
O Monday				
O Tuesday				
Wednesday Thursday				
O Friday				
PREV	FINISH	NEXT		

Figure 15: Multiple Choice question

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

Pick Correct

QUESTION TYPES		
	PREV 1 2 3 4 5 6 7 NEXT	
Time remaining: 10:47		
This is an example of a Pick Correct Question. Which 3 of the following are colours?		
Brown Phone		
Red Car		
 ✓ Car ✓ Yellow 		
PREV	FINISH	NEXT

Figure 16: Pick Correct question

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

Not all questions will specifically ask for X correct answers so it is important to remember when the answers use a 'check box' 2 you are able to select more than one answer. If the answers are marked with a radio button 2 then the question is a Multiple Choice and only 1 answer can be selected.

Hot Spot

QUESTION TYPES		
	1 2 3 4 5 6 7 NEXT	
🛣 Time remaining: 11:39		
Hot Spot Question Place the pin where you think the treasure is hidden.		
	FINISH	NEXT

Figure 17: Pick Correct question

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

Text

QUESTION TYPES						
	PREV 1 2	34	56	V NEXT		
☑ Time remaining: 11:11						
Simple Text Question Please type the missing word from the following nursery rhyme. Three blind						
mice						
PREV		FINISH				NEXT

Figure 18: Text question

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

Numeric

QUESTION TYPES		
	PREV 1 2 3 4 5 6 7 NEXT	
图 Time remaining: 10:29		
Numeric Question Please enter the missing number from the following sequence. 1, 2, 3, 4, 5, 7, 8, 9, 10		
đ		
PREV	FINISH	NEXT

Figure 19: Numeric question

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

Feedback

JESTION TYPES		
	PREV 1 2 3 4 5 6 7	
Time remaining: 8:47		
redback Question ow likely are you to recommend the last film you watched to y = not at all 10 = definitely, its the best film I've seen	ur friends of family?	
0 1		
○ 2		
О з		
⊖ 4		
O 5		
0 6		
0 7		
• 8		
0 g		
0 10		
Comments		

Figure 20: Feedback question

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

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

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

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

Media within questions.

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

QUESTION TYPES		
	PREV 1 2 3 4 5 6 7 NEXT	
Time remaining: 12:56	the	
Answer with Image attached		Videos / Images will display next to the question text. Video clips can be viewed as displayed or full screen and you can play / pause / rewind / fast forward the clip as required. Images can be views as displayed or made full size by clicking on the image.
q	Images and videos can also be attached to the answers and have the same controls as those attached to the question.	
ľ	Figure 21: Question media	

Additional Info

 corrrect Do Not Know Additional Info another critical another critical correct also correct incorrect jo Do Not Know
Do Not Know Additional Info another critical correct also correct incorrect incorrect
Additional Info another critical correct also correct incorrect incorrect
another critical correct also correct in incorrect
 correct also correct incorrect
correct also correct incorrect incorrect
correct also correct incorrect incorrect
also correct incorrect
incorrect
Do Not Know
FINISH

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

3.3 Feedback Assessments

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

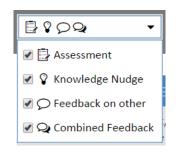


Figure 22: Feedback on other users

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

Work through the assessment selecting the relevant answer.

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

4 Viewing Results

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.

USER RESULTS	REPORT		
Report filters:	Start Date 14-Nov-2015 End Date 14-Dec-2015	The selected position only \Box into the hierarchy $1 \oint_{\bullet}^{\bullet} \text{leve}(s) \text{ down}$	Export
Demo Inc (Demo Admin Head of Operations		The report needs to be rebuilt to reflect your selections Rebuild report Rebuild report	
 ✓ Select All ✓ Assessment 1 (1) 			

Figure 23: 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.

USER RESULTS	REPORT				
Report filters:		14-Nov-2015 14-Dec-2015	Ē	The selected position only Into the hierarchy 1 Level(s) down Exp	xport
 Demo Inc (Demo Ad) Head of Operation 			 ✓ Assessment 1 ✓ Questions 	Twojeć #% 100% 40.00% 40.00% 60.00% 100%	
Select All			type the word 'right'. Question 1	100.00%	
✓ Assessment 1 (1)			New Hot Spot Questi New Numeric Questi > Feedback	0.00%	
			New Content	0.00%	

Figure 24: 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.

			×
Question Type -	Multiple Choice Question		Result
Question	Question 1		
Correct Answer	Answer 1		
Demo Admin	Answer 1	٩	All Right 100.00 % (1)

Figure 25: 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.

	● The selec ○ Into the P			evel(s)	down	
Target 8%						100%
	50.00%					
	50.00%					
0.00%						
		100.0	00%			
		100.0	00%			
0.00%						
	60.00%					
an 0.00%						

Figure 26: Exporting assessment details

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

5 Viewing Feedback Results

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

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

FEEDBACK RESULTS REPORT									
Report Filters	Start Date 14-Nov-2015 End Date 16-Dec-2015		Export						
Demo Inc (Demo Admin (+1 other)) Head of Operations (+4 ww Bristow)		The report needs to be rebuilt to reflect your selections Rebuild report							
Huw Bristow									

Figure 27: 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.

FEEDBACK RESULTS	S REPORT		
Report Filters	Start Date 22-Nov	-2015	
	End Date 24-Dec		Export
Sales and Servi	ice Agent (Kelly Vargas)	➡ Self (1) → Manager (1)	
Sales and Servi	ice Agent (Mary Miller)		
Sales and Servi	ice Agent (Joslah Walton)	How would you rate your performance the month performance to the month performance the second	is
Sales and Servi	ice Agent (Lorenzo Bratzo)	How would you rate the coaching you ha received this mont	
Sales and Servi	ice Agent (Howard Johnson)	Do you feel that the business has fu supported you in achieving your goals th	
Sales and Servi	ice Agent (Khris Sawyer)	mont	in a state of the
Sales and Servi	ice Agent (Roger Caravan)	Who you recommend working here to a frien	

Figure 28: Feedback Results

The information is also available for exporting to an Excel spreadsheet by selecting **Export**. The Excel spreadsheet will contain the criteria used in the assessment.

6 Managing and Viewing Crystal Reports

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

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

6.1 Managing Report Settings

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

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

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

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

6.2 Managing Reports

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

ANAGE REPORTS					
+ Add New Report	Connection Types	Admin Report	Archived	Last Updated	🖒 Refrest
No records to display.	connection types	Adminicipole	, achived	List oputed	
	age size: 15 🔻				0 items in 1 page
		Figure 20: Manage D	De est		



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

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

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

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

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

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

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

6.3 Viewing Reports

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

7 Certificates

If a user has achieved the required pass mark, the certificate 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.

MY CERTIFICATES	
	cate for, then click the certificate to view/print it.
Assessments Assessment 1	Certificates Certificate 1 - 14/12/2015 15:31:39
	Show certificate

Click on the certificate to open and prepare it for printing.

Figure 30: Viewing certificates

8 DNA

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

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

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

8.1 My DNA

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

8.2 Date Range



Figure 31: MY DNA Dates

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

8.3 Data Visualisation

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

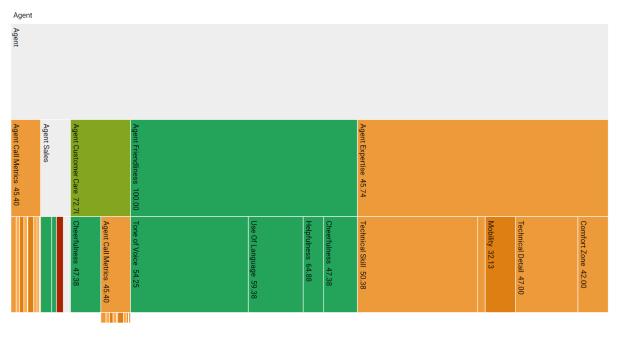


Figure 32: My DNA

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.

8.4 Data Issues



Figure 33: DNA Data Issues

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

8.5 View Filtered DNA

The **View Filtered DNA** page shows user performance for Strands and User Demographics where users fall into each threshold band. Initially it shows a chart for each User Demographic, then for each strand selected. The chart(s) display the percentages of users within each threshold band.

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

Rolling Dates		() F	Fixed Dates		
1	• Weeks	•	9/12/2017	9/18/2017	#



8.5.2 Strand Selector

Select Strand(s) by clicking the orange button beneath Strands and selecting the relevant strands from the modal and clicking 'OK', clicking 'CANCEL' will remove all selections you have made. A maximum of 10 strands can be selected, if more than 10 are selected it will disable the 'OK' button.

	Strands		
	No strands selected	0	
	Figure 35: S	trand Count	
STRANDS			,
Type to filter			
Strand 01	Strand 02	Strand 03	Strand 04
Strand 05	Strand 06	Strand 07	Strand 08
Strand 09	Strand 10	Strand 11	Strand 12
Strand 13	Strand 14	Strand 15	Strand 16
Strand 17	Strand 18	Strand 19	Strand 20
Strand 21			
ОК			CANCEL

Figure 36: Selecting Strands

8.5.3 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.



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**.

USER SELECTION		
× 911 operator ADD USER SELECTION	Demographic Mapping	Occupation • X
		Type to filter
		Ø 911 operator
		A & P mechanic
		ABE teacher
		Abdominal sonographer
		Able seaman
		Abstractor
		Academic dean
		Ccount clerk
		Account collector
ОК		CANCEL

Figure 38: User Selection

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.

8.5.4 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.

	LOAD	SAVE	
	G	0	
_	Figure 39: F	ilter Buttons	1
LOAD FILTER			
Saved filter selection	A New Default		•
Make this my defaul	t 🖉		
ОК			CANCEL

Figure 40: 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.

SAVE FILTER	
Name	A New Default
Make this my default	✓
ОК	CANCEL

Figure 41: Saving Filter

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.

Once all your filters have been selected, click 'GO' to get the threshold band chart(s).

Rolling Dates		C Strands	User Selection		LOAD	SAVE
1	• Weeks	 No strands selected 	0 No user selections defined	0		

Figure 42: Visualisation Summary

8.5.5 Data Visualisation

The charts below show users grouped into the relevant threshold bands for their aggregated BDD/Calculated results per Strand/Demographic. Clicking the coloured circles in the top right corner of each chart will toggle that bar for that chart on and off.

Fixed Dates		Strands	User Selection		LOAD	SAVE
1/1/2014	9/14/2017	Strand 02	911 operator, dayrep.com	2	G	0
Occupation:[911 operator]	One Two Three	Job Title:[dayrep.com]	One Two Three			
0.00		0.00				
0.00		0.00				
	100.00		100.00			
0.00	100.00	0.00	100.00			

Figure 43: Filtered DNA

8.5.6 Threshold Band Data

To see the data for a given bar you can click on a bar within a single chart and it will bring up the filtered detail window to show all data for that threshold band. You can then see the individual breakdowns within the partition chart and a list of users to filter by.

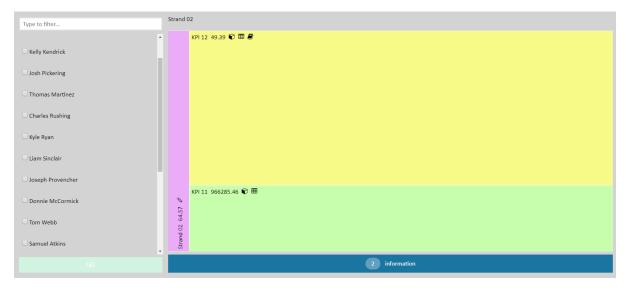


Figure 44: DNA Drill through

You can reduce the number of users shown by searching for a user(s) by searching for them via the filter box.

Type to filter	Strand 02
•	KPI 12 49.39 👽 🎟 🖉
Kelly Kendrick	
✓ Josh Pickering	
Thomas Martinez	
Charles Rushing	
🗆 Kyle Ryan	
🗆 Liam Sinclair	
Joseph Provencher	KPI 11 966285.46 🐨 🎟
Donnie McCormick	
Tom Webb	
Samuel Atkins	Strand 02
GO	2 information



8.5.7 Assign Users to Learning Item(s)

Clicking on the book icon (furthest right in the icon list) will show the Learning Item Assignments grid.



Figure 46:View Learning Items

Clicking the + button expands the grid to show the users for each learning based on Recommended, Core or Extended.

Clicking 'CLOSE' at any stage will return to the partition chart cancelling any existing selections made. Users can be found within the individual tabs for each recommendation type and results are paged per tab, the number of results can be adjusted by changing items per page.

Type to filter	KPI 12					CLOSE
Kelly Kendrick		Name				
Josh Pickering	-	NEW (0 Core, 0 Extended, 19 Recomm	ended)			
		Recommended	Extended		Core	
Thomas Martinez		Select all Recommended				
Charles Rushing		Type to filter				
🗌 Kyle Ryan		Aaron Lees	Bulky McBulkface	Charles Rushing	Donni 🔲 Donni	e McCormick
🗌 Liam Sinclair		Gary Garmon	Jennifer Hayes	Joseph Provencher	Josh P	ickering
Joseph Provencher		Kelly Kendrick	Kyle Ryan			
Donnie McCormick		« < 1 > »		10 🔻 items per page		1-10 of 19 items
Tom Webb		Assignment Date From	*	Assignment Date To		ASSIGN
Samuel Atkins			1 CT	hospinist but to		ASSIGN

Figure 47: Viewing Attached Learning Items

Selecting users from within a tab and then switching to another will remember your options. This is so that users can be selected for all recommendation types, for all returned learning items and assigned in bulk. Once all users have been selected for assignment, select the assignment from and to date and click 'Assign'.

Type to filter	KPI 12	CLOSE
Kelly Kendrick Josh Pickering	Name NeW (0 Core, 0 Extended, 19 Recommended)	
Thomas Martinez	Recommended Extended Core No users found.	
Charles Rushing	<pre>« < 1 > »</pre> 10 • items per page	1-0 of 0 items
Kyle Ryan	Assignment Date From 🛗 Assignment Date To 🛗	ASSIGN
Joseph Provencher		
Donnie McCormick		
Tom Webb		
Samuel Atkins		
60		

Figure 48: Assign Learning Items

If the assign is successful it will close the Learning Item Assignment and return to the partition chart and all users selected will be placed in the assignment queue.

9 Changing Your Password

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

Old Password	
New Password	
Confirm New Password	
	Save

Figure 49: Changing your passwordTagging

10 Personal Development Reviews

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

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

10.1 PDR Dashboard Widget

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

PDR Dashboard								
Jser $ ightarrow$ PDR Dashboard								
LOGIN ID	NAME	STATUS						
СТВ20	Malkhazni Dratchev	Submitted 🖌						
CTB44	Juanito Gairbekov	In Progress						
CTB32	Zelim Kadiev	Approved 🔮						
CTB38	Penultimo Kadyrov	Not Started						
СТВ8	Bekbulat Korgay	Not Started						
CTB14	Batir Korgay	Not Started						
CTB50	Zulikhan Panova	Not Started						
CTB26	Salavdi Timayev	Not Started						

Figure 50: PDR Dashboard

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

ENVIRONMENTAL*	FINANCE*	VISION*	OPERATING EFFICIENCY	CUSTOMER		SAVE YOUR PROGRESS	PROPOSE OBJECTIVES		
ENVIRONMENTAL DESTRUCTION:									
Take all the steps necessary to ensure the profitability, especially if it leads to environmental damage.									
REVENUE 🖋 OB	JECTIVE 2						ADD OBJECTIVE		
OBJECTIVE DETAIL:									
Increase the amount of revenue from new sources by not less than £10,000 during the next year.									
HOW WILL THIS BE ACHIEVED:									
Greater focus on multichannel sales									
TARGET TYPE:		WHAT WILL BE ME	ASURED:		WHAT IS THE TARGET:	TARGET DATE:			
Goal	•	Revenue			£10000+	5/12/2015	1		

10.1.1 PDR Dashboard Widget

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

11 Logging Out

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

Collapsed Menu



Expanded Menu

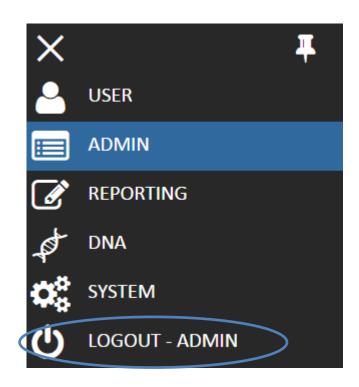


Figure 52: Logout