

Recruit, Develop, Perform, Reward

NetDimensions LMS 15.1

HR Administration Guide

An overview of HR Administration features in PeopleFluent Learning NetDimensions LMS Version 15.1

www.peoplefluent.com/products/learning

Document Information

Document ID: EN15111 Document Title: NetDimensions LMS 15.1 - HR Administration Guide Document Version: 1.0 Document Date: January 2020

This document may be revised from time to time.

Legal Notices

This document has been created for authorized licensees and subscribers ("Customers") of the software products and associated services of Learning Technologies Group, Inc. by its division PeopleFluent and all of its affiliates (individually and collectively, as applicable, "PeopleFluent"). It contains the confidential and proprietary information of PeopleFluent and may be used solely in accordance with the agreement governing the use of the applicable software products and services. This document or any part thereof may not be reproduced, translated or retransmitted in any form without the written permission of PeopleFluent. The information in this document is subject to change without notice.

PEOPLEFLUENT DISCLAIMS ALL LIABILITY FOR THE USE OF THE INFORMATION CONTAINED IN THIS DOCUMENT AND MAKES NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO ITS ACCURACY OR COMPLETENESS. PEOPLEFLUENT DISCLAIMS ALL IMPLIED WARRANTIES INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. PEOPLEFLUENT DOES NOT GUARANTEE THAT ITS PRODUCTS OR SERVICES OR ANY SAMPLE CONTENT CONTAINED IN ITS PRODUCTS AND SERVICES WILL CAUSE OR ENABLE CUSTOMER TO COMPLY WITH LAWS APPLICABLE TO CUSTOMER. USERS ARE RESPONSIBLE FOR COMPLIANCE WITH ALL LAWS, RULES, REGULATIONS, ORDINANCES AND CODES IN CONNECTION WITH THE USE OF THE APPLICABLE SOFTWARE PRODUCTS, INCLUDING, WITHOUT LIMITATION, LABOR AND EMPLOYMENT LAWS IN RELEVANT JURISDICTIONS. THE PEOPLEFLUENT PRODUCTS AND SAMPLE CONTENT SHOULD NOT BE CONSTRUED AS LEGAL ADVICE.

Without limiting the generality of the foregoing, PeopleFluent may from time to time link to third-party web sites in its products and/or services. Such third-party links are for demonstration purposes only, and PeopleFluent makes no representations or warranties as to the functioning of such links or the accuracy or appropriateness of the content located on such third-party sites. You are responsible for reviewing all content, including links to third-party web sites and any content that you elect to use, for accuracy and appropriateness, and compliance with applicable law.

Any trademarks included in this documentation may comprise registered trademarks of PeopleFluent in the United States and in other countries.

Microsoft, Windows, and Internet Explorer are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries. Oracle and PeopleSoft are registered trademarks of Oracle International Corporation. Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated. All other names are used for identification purposes only and are trademarks or registered trademarks of their respective owners. Portions of PeopleFluent Workforce Communication software may include technology licensed from Autonomy and are the copyright of Autonomy, Inc. Quartz Scheduler is licensed under the Apache License.

Website: www.peoplefluent.com

Email: support@peoplefluent.com

Copyright © 2020, Learning Technologies Group, Inc. All rights reserved.

Table of Contents

1. Introduction	
2. Certification Manager 4	
3. Proficiency Levels	5
4. Competencies	Э
5. SFIA Library	3
6. Job Profiles	7
7. Mapping Competencies to Job Profiles	ô
8. Auto-Assign Console	Э
9. Competency Group Editor	1
10. Assessment Management	Э
11. User Search	8
12. Goal Management	9
13. Performance Appraisals	15

Introduction

This document covers the following features:

- Certifications
- Competencies
- Job Profiles
- Goals
- Performance Appraisals

Certification Manager

Certification Pools

Go to Manage > Learning > Certification Manager > Certification Pools.

NetDimensior	is Talent Suite	Mana	ige Center				👗 SAPLALA K
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Certificatior	n Pool						
The list below indic	ates those pools	currently config	ured. Pools are used a	s a means to qi	oup related items	for easy referen	ce and assignm
The list below indic update, or delete a	ates those pools n entry, click the a	currently config appropriate butte	ured. Pools are used a on.	s a means to gi	oup related items	for easy referen	ce and assignm
The list below indic update, or delete a Maintenance Forr	ates those pools n entry, click the a n	currently config appropriate butt	ured. Pools are used a on.	s a means to gr	oup related items	for easy referen	ce and assignm
The list below indic update, or delete a Maintenance For Certification Poo	ates those pools n entry, click the a n	currently config appropriate butto General	ured. Pools are used a on.	s a means to gr	roup related items	for easy referen	ce and assignm

To create a Certification Pool:

Add Update Selection Delete Selection

- 1. Enter the name of the certification pool in the **New Name** entry field.
- 2. Click the **Add** button to append the new entry.

To update a certification pool:

- 1. Select the certification pool you want to modify.
- 2. In the New Name entry field, enter the new name of the certification pool.
- 3. Click the Update Selection button to save the updates.
- 4. Click the Permission button to launch the Permissions Selector

To remove a certification pool:

- 1. Select the certification pool you want to remove.
- 2. Click the Delete Selection button.

Certification Types

Go to Manage Center > LEARNING > CERTIFICATION MANAGER > Certification Type.

NetDimensio	ns Talent Suite	Mana	ige Center				🛔 SAPLALA Katrina
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Certificatio	on Type						
The list below in click the appropr	dicates those pools iate button.	currently confi	gured. Pools are used a	is a means to g	group related item	s for easy reference and	assignment. To add, update, or delete an entry,

Maintenance Form		
Certification Type	Course Completion	
New Name:		
Add Update Selection Delete Selection		

To create a new Certification Type:

- 1. Enter the name of the new certification type in **New Name**:
- 2. then click **Add**.

To modify a Certification Type:

- 1. Select the certification type you want to modify.
- 2. Enter the new name of the certification type,
- 3. Click the Update Selection button.

To remove a Certification Type:

- 1. Select the certification type you want to remove.
- 2. Then click the Delete Selection button.

Certifications

Certifications are managed at Manage > Learning > Certification Manager > Certifications. From here you can:

- 1. Create a New Certification
- 2. Search existing certifications
- 3. Edit existing certifications

Manage	e Center								🛔 HO Sa	ra
Overview	Learning	Talent	Communicate	Users	Reports	System				
Certifica	ations									
Certificatio Status Active	on Name/Descriptio	on Cer Issu	tification Code ued By		Certification Po All	Hide filters	tification Type I	T		
Showing: 1 -	10 of 49								Results per Page: 10	•
	10 01 43									»
Bulk Action	n T	ma/Cada		rtification D		. Tune	Status	laguad Pur	+ Create Certification	»
Bulk Action	n ▼ Certification Na 委托培训 WTPX	me/Code	Ce Ge	rtification Po	ool	• Type External Certification	 Status Active 	≎ Issued By	 Date Entered Feb 25, 2014 11:26 AM HKT 	n ¢
Bulk Action	n ▼ Certification Na 受托培训 WTPX ZCorp Sales 5601	me/Code	Ce Ge Sa	rtification Pe neral les	pol	Type External Certification Course Completion	Status Active Active	: Issued By	 Date Entered Feb 25, 2012 1:12 PM HKT 	»
Bulk Action	n マ Certification Na 愛托培训 WTPX ZCorp Sales 5601 XX New Hire Ori JEA_NHO	me/Code	Ce Ge Sa JE	rtification Pe neral les A New Emplo	pol vyee	Type External Certification Course Completion Course Completion	Status Active Active Active	Issued By Jooli Alkins	Image: Control of the second secon	» ≎
Bulk Action	Notifies to the second secon	me/Code entation	Ce Ge JE Ge	rtification Pr neral les A New Emplo neral	ool iyee	Type External Certification Course Completion Course Completion Internal Certification	Status Active Active Active Active Active	o Issued By Jooli Alkins	Image: Constraint of the second se	»
Bulk Action	re of H3 Certification Na 要托追训 WTPX ZCorp Sales 5601 XX. New Hire Ori JEA_NHO Winning Teams 1 University Diplon 9	me/Code entation	Ce Ge Sa JE Ge St	rtification Pe neral les A New Emplo neral	ool	Type External Certification Course Completion Course Completion Internal Certification University Diploma	C Status Active Active Active Active Active Active Active Active	S Issued By Jooli Atkins	Image: Control of the control of t	× ·
Bulk Action	Received and a second	me/Code entation I na Open	Ce Ge Sa JE Ge Stu Ge	rtification Pro neral les A New Emplo neral tus Testing neral	ool	Type External Certification Course Completion Course Completion Internal Certification University Diploma Internal Certification	C Status Active Active Active Active Active Active Active Active	C Issued By	I I	» ¢
Bulk Action 	Recretification Na 愛托语训 WTPX ZCorp Sales 5601 XX New Hire Ori JEA_NHO WINNER 1 University Diplon try try try try Training Certification	me/Code entation i na Open te	Ce Ge JE Ge Stu Ge Ge	rtification Pe neral les A New Emplo neral neral neral	nyee	 Type External Certification Course Completion Course Completion Internal Certification Internal Certification Internal Certification Internal Certification 	C Status Active Active Active Active Active Active Active Active Active	C Issued By Jooli Atkins	I I	» ¢

Form Fields for PDF Certificates

PDF generation for Certificates supports the a number of fields to allow you to populate your PDF templates with data dynamically.

Object	Field	Field ID
Certificate	Certificate ID	CertificateId
Certificate	Certification Code	CertificateCode
Certificate	Certification Name	CertificateName
Certificate	Award ID	AwardId
Certificate	Award Date	AwardDate
Certificate	Expiration Date	ExpirationDate
Certificate	Serial Number	SerialNumber
Certificate	System Timestamp	SystemTimestamp
Course	Course ID	Courseld
Course	Course Name	CourseName
Course	Duration Comments	CourseDuration
Course	Course start date	CourseStart
Course	Course end date	CourseEnd

Course	Objectives	Objective1, , ObjectiveX
Course	Module Description	ModuleDescription
Course	Session Title	SessionTitle
Course	Facility Code	FacilityCode
Course	Updater's legal name	UpdaterLegalName
Course	Signed Date	SignedDate
Course	Update Meaning	UpdateMeaning
Course	All Module Attributes	AllModuleAttrs
Course	Performance Grade	PerformanceGrade
Course	Score	FinalScore
Course	Credits	TrainingCredits
Learner	User Name	UserName
Learner	User Name (First Name then Last Name)	UserFirstLastName
Learner	First Name	UserFirstName
Learner	Last Name	UserLastName
Learner	User ID	CurrentPid
Learner	Employee Number	EmployeeNumber
Learner	Job Title	JobTitle
Learner	User Attributes	UserAttr1, , UserAttr8
Learner	Date of Birth	DateOfBirth
Learner	Address 1	Address1
Learner	Address 2	Address2
Learner	City	City
Learner	Department Name	DepartmentName
Instructor	Instructor Name	Instructor1Name,, InstructorXName
Instructor	Instructor Job Title	Instructor1JobTitle,, InstructorXJobTitle
Instructor	Instructor Department Name	Instructor1DepartmentName,, InstructorXDepartmentName
Instructor's Direct Appraiser	Instructor's Direct Appraiser Name	Instructor1DaName,, InstructorXDaName
Instructor's Direct Appraiser	Instructor's Direct Appraiser Job Title	Instructor1DaJobTitle, , InstructorXDaJobTitle

Instructor's Direct	Instructor's Direct Appraiser	Instructor1DaDepartmentName, ,
Appraiser	Department Name	InstructorXDaDepartmentName
Task Approver	Approver Name	ApproverName

Individual Dynamic Attributes can also be used to populate the Certificate PDF Fields by using the following keys:

- 1. For module attributes, "ModuleAttr-AC" where "AC" should be replaced by the respective attribute's code
- 2. For User Attributes, "UserAttr-UA" where "UA" should be replaced by the respective attribute's name



Certificate Name:	Cert Last a Year	Course Name:	Classroom With Cert
Certificate ID:	276401	Course ID:	CLASS-003
Award ID:	EKP-0055-3610-1831-0793	Course Duration:	MyDurationComment
Award Date:	September 2, 2013	Course Start:	September 1, 2013
Expiration Date:	September 2, 2014	Course End:	September 2, 2013
Serial Number:	101-276401		
System Timestamp:	October 22, 2013		
User Name:	Learner PID	Job Type:	Permanent
Job Title:	MyJobTitle	Blood Type:	0
Date of Birth:	February 3, 1981	Gender:	Male
Address 1:		Nationality:	British
	MyAddress1	MyExt1Value	
Address 2:	Mr.A. Harry 2	MyExt2Value	
	MyAddress2		
City:	MyCity		
Module Description:	My Module Desc	My Objective 1	L
Session Title:	My Session Title 1	My Objective 2	2
Facility Code:	Various Locations	My Objective 2	3
Instructor Name:	Direct Appraiser Pid	Director Name:	Administrator Pid
Instructor Job Title:	PidDirectAppraiser	Director Job Title:	PidAdmin
Department Name:	PidDept	Department Name:	PidDept
Instructor Signature:		Director Signature:	

A sample certificate PDF with dynamically populated fields

Searching for a Certification

Under **Manage Center** > **LEARNING** > **CERTIFICATION MANAGER** > **Certifications**, the Users can search for a certification with the filters. The search can be done:

- 1. With "Name/Description" containing a search term;
- 2. With "Code" equal to a search term;
- 3. With "Status" as "Active", "Inactive", or "All";
- 4. With the certifications in a certain "Certification Pool";
- 5. With the certifications of a "Certification Type";
- 6. With "Issued By" containing a search term.

OVERVIEW LEARNING	TALENT	COMMUNICATE	USERS	REPORTS SYS	STEM			
Certifications								
				* HIDE FILTERS				
Certification Name/Description	Certification	Code	Certification F	'ool Ci	ertification Type			
Status	Issued By		All	•	All			
Active •								
Filter Reset								
Filter Reset							Results per Pane: 1	•
Filter Reset							Results per Page: 1	T
Filter Reset							Results per Page: 1	v
Filter Reset Showing: 1 - 10 of 38 Bulk Action							Results per Page: 1 1 2 3 4 4 + Create Certifica	v »
Filter Reset Showing: 1 - 10 of 38 Bulk Action Certification Name/Co	de	 Certification Pool 	: k	⇒ Туре	\$ Status	\$ Issued By	Results per Page: 1 Create Certifica Create Certifica Create Certifica	v » ion
Filter Reset Showing: 1 - 10 of 38 Bulk Action Certification Name/Ce Getification Name/Ce Getification Name/Ce Certification Name/	ıde	 Contification Pool General 	si is	Type External Certification	≎ Status Active	≎ Issued By	Results per Page: 1 1 2 3 4 2 + Create Certifica	v » ion ≎
Filter Reset	vde	✓ Certification Pool General Sales	si is	Type External Certification Course Completion	♦ Status Active Active	≎ Issued By	Results per Page: 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 2 3 4 1 1 1 2 3 4 1	v » ion

The search filters are also available in the Certification Selector.

Certification Details

The CERTIFICATION DETAILS Section is for modifying the basic certification details. You can configure the following properties:

- Permissions
- Certification Code
- Certification Name
- Certification Pool
- Certification Type
- Language
- Active
- Issued by
- Certification Description

Info: Inactive Certifications

For Inactive Certifications:

- They will not be assignable to any users, either manually or automatically;
- They have been excluded from automated tasks. They will not result in automated notifications or enrollments;
- They will not be listed for Learners as Current (My Certifications) or Expiring (Home Page Widget).

The Users are not allowed to do the following concerning Inactive Certifications:

• They cannot award or request approval of certificates that are of inactive status in the

- Certifications of the Learner's Career Development Center.
- They cannot approve Inactive Certifications at Certification Approval.

According to the certification awarding logic, only active certificates can be awarded to Learners under all situations, including:

- All places that will trigger the auto award task when Learners complete Learning Modules linked to a certificate, or
- The time when a user tries to award certificates using the Awarded Certifications CSV Loader.

Overview Learning 1	alent Communicate	Users Rep	orts System		
Certifications >					
Edit Certification 委拍	培训				
Certification Details					
Access control Permissions					
Date Entered:					
Feb 25, 2014 11:26 AM HKT Certification Code*					
WTPX					
Certification Name*					
委托培训					
Certification Pool					
General 🔻					
Certification Type					
External Certification •					
Language					
Multi-Language	¥				
Active 🕑					
Certification Description					
该证书只为委托培训记录颁发	•				
Award Method	li.				
 Immediately 					
Award this certificate on the	following date(s):				
Every v of v	B				
ofen rodine hhà					
And another date					
Award Message Select					

Award Method

Select the time of awarding by checking either one of the following:

- Immediately; or
- Award this certificate on the following date(s):

Every {Date} **of** {Month} - the Certification is to be awarded on the selected date of the selected month every year. Click **+ Add another date** if necessary.

Award Message

Click Select to bring out the E-mail Template Editor window to configure the Award Message.

Assigned certificate exam

If the Certification will be attached to a module / program, Click **Select** to bring out the **Selector** to configure this association. There are two conditions for awarding the Certifications, either:

- On completion of the course; or
- On passing the exam, if there is an associated exam.

Certificate

The CERTIFICATE Section is for assigning certification templates.

- Press . This will bring up the **Repository Manager** window to select the template.
- Check Allow user to print the certificate if required.
- For Attach certificate to notifications to:
 - Check the personnel if the certificate is to be attached to the notification email sent to them.
 - Its checkbox will be automatically checked once any staff member(s) under it is / are ticked.

CERTIFICATE	
Certification Template (PDF form) Reference	
Certificate of Completion.pdf	··· 🔟
Allow user to print the certificate	
Attach certificate to notifications to:	
Approver	
🖉 Participant	
Direct Appraiser	
🕑 HR Manager	
Course Specific Instructor(s)	
🕑 Default System Approver	
Default System User/Administrator	
External E-mail	
Appraisal Reviewer	
Appraisal Super-Reviewer	
Organization Approver	

Expiration / Renewal Policy

The **EXPIRATION/RENEWAL POLICY** Section is for setting and modifying the details concerning expiration and renewal of the certifications.

For Expiry Date

- If the certificate is not supposed to expire, Check Never.
- The Expiration / Renewal of Certificates can be set After ____ Day(s) / Year(s) from award date.
 - Expire Grace Period
 - **None**: No Grace Period for the Expiry Date;
 - End of Month: A Grace Period till the end of the expiry month will be granted.
 - Based on previous expiry date:
 - Applicable to the certifications awarded at course completions but not by Direct Appraisers.
 - If the previous certification is still <u>valid</u> once checked, the Expiry Date will be calculated based on the expiry date of the previous certification.
 - If the previous certification is <u>expired</u> once checked, the Expiry Date will be calculated based on the Award Date of the new certification.
- The Expiration / Renewal of Certificates can be set **On** a specific date (Date; Month; Year). Whe

n a specific date is chosen, a renewable period can be entered by checking **And every Da y(s)** / **Year(s) thereafter**, inputting the number in the text box, and selecting **Day(s)** or **Year(s)**. The System will display a tooltip showing the upcoming expiry date and the next three expiry dates calculated based on the input settings.

EXPIRATION/RENEWAL POLICY
Expiry Date Never
O After 0 Day(s) Trom award date
Expire Grace Period None
Base on previous expiry date 1
On 1 v Jan v 2017 v
0 Days Prior to Expiration for Sending a Reminder Message and to Reenroll User in Module/Program
Certification Expiration Reminder Message Default Certification Expiration Reminder
When this certification expires, automatically enroll the learner in selected module: Select
Only learner who meet following criteria can be automatically enrolled.
Grace Period
Certifications may employ "grace" periods before and after the expiration. These settings control grace period handling based on required regulation
Renewal Regulation
N/A 🔹
of Days Grace Prior to Expiration
0
of Days Grace After Expiration
0

- Day(s) Prior to Expiration for Sending a Reminder Message and to Reenroll User in Module/Program: for setting whether to send a reminder message to the Users and re-enrol the m into the Module / Program a certain number of days before expiration; the number is entered into the text box.
 - Setting this field to zero means that no reminder will be sent prior to expiration, but the System will still proceed with assigning the Users to a Module / Program.
 - The contents of the "Certification Expiration Reminder Message" can be set by clicking De fault Certification Expiration Reminder to bring out the E-mail Template Editor windo w.
- When this certification expires, automatically enroll the learner in selected module: -Check it to automatically enroll the Learners to an assigned learning module once the certification expires.
 - Click **Select** to bring out the to choose the required module(s).
 - Only learner who meet following criteria can be automatically enrolled Check it to set the criteria of the Learners to be included. A list of criteria will be displayed; click the desired item(s) to expand for setting:

Select

Only learner who meet following criteria can be automatically enrolled.
Vsers/Organization/Role
Employment Information
✓ Job Profiles & Competencies
Job Profile Competencies Users should meet Any • of the following Competency criteria:
Selected Competencies:
Name From Proficiency Level To Proficiency Level
There are no items to display.
► User Attributes
Organization Attributes

For Grace Period, you can configure:

- Renewal Regulation: Select the requirements for Renewal from the drop-down list.
- **# of Days Grace Prior to Expiration** (Text Box): Set the number of days before the Expiry Date for the Period.
- **# of Days Grace After Expiration** (Text Box): Set the number of days after the Expiry Date for the Period.

Grace Period

Certifications may employ "grace" periods before and after the expiration. These settings control grace period handling based on required regulations.



Certification Status Homepage Widget

Expiring certifications can be highlighted on the home page with the "Expiring Certifications" homepage widget.

- Only expiring/expired certifications will be listed in the widget.
- While an expired certification has passed the associated expiry date, an expiring certification
 has not yet expired but only passed the date after which an email reminder should have been
 sent, prior to expiration (this date is based on the "# Days Prior to Expiration For Sending a
 Reminder" option configured in Certification Editor).
- At the bottom of the widget there is a link to all Certifications.

EXPIRING CERTIFICATIONS		NE	WS					
Name	Expiry Date	No	news ann	ouncemei	nts at th	nis time.		
Certified Software Engineer	Sep 12, 2013	5	RSS feed					
Best Employee	Oct 12, 2013							
	Vie	v all Certifications	IROLLME	ENTS				
RECENT ACTIVITY		You	do not h lules to li	ave any re st.	cently	accesse	d learni	ng
tere is no recent activity to display.		PI	RSONAL	CALEN	DAR			
CATALOG SEARCH							-	
Keywords			ctober	2	13		Today	
		S	м	T	w	T	F	S
Learning Type		29	30	Oct 1	2	3	4	5
All		6	7	8	9	10	11	12
		13	14	15	16	17	18	19
Search		20	21	22	23	24	25	26
		21	28	29	30	31	Nov 1	2

Certification CSV Loader

The Certification CSV Loader allows certificates to be awarded in bulk. For more information, please refer to EN145 Data Import / Export.

Self-Award Certification

Self-award certification allows users to award themselves pre-defined certifications (subject to approval by the user's direct appraiser). In addition, functionalities to upload attachment and an approval mechanism is supported by the *"Certification Awarding CSV Loader"*. This would allow digital proofs to be uploaded if necessary and share the same approval process. Other functionalities are also available for this feature such as:

- a. Notification and automatic re-enrollment for expiring certifications
- b. Reporting functionalities associated with certifications awarded
- c. The certificationsAwarded API

Self-Award Certifications

The "Self-Award Certification" tab is located in the Certifications page.

-		-				-		
lome	Learning Center	Career Center	Workspace	Connect	Reports	1		
-								and the second second
CED		-						
CER	THEATIONS	2						
Certifica	ations Certifications F	or Approval						
Status	i							
Oper	n for Editing	•						
							+ Self-Award C	ertification
Certifica	ition	٢	Issue Date	~	Expiration Date	•	Comments	۵
CRT015	Name (CRT015Code)		Jul 5, 2016		Jul 7, 2016		This is CRT015	

By clicking on the "Self-Award Certification" button, a web form is generated as shown in Figure 2 below. Users are able to fill out all the necessary information of the awarding certification, choose a file as attachment if necessary and click on the "Save" button to save information of the awarding

certification.

Please note that selection of certifications is subject to user's authorization. For instance, if John doesn't have permission for certification A, then John won't be able to self-award certification A to himself. In addition, if "Expire Date" is not entered at the time the self-award certification is saved, "Expire Date" is automatically calculated according to the default Expiry Date settings of the selected certification. The screen below is Details of the Self Award Certification:

Home Learning Center	Career Center Workspace Connect Reports
and a state of the	
SELF-AWARD CE	RTIFICATION
This form may be used to reque Status = "Open for Editing". To s	est for the award of a predefined certification. Please note that certification details including attachment, are only editable when submit the certification for approval, please set Status as "Pending for Approval" and click on the "Save" or "Update" button.
Certification*:	Online Certification (Online C 🚥 📾
Status:	Open for Editing
Comments:	N/A
Issue Date*:	Aug 1, 2016
Expire Date:	Date 🛗
Attachment:	Choose File www.t.pdf
(* Mandatory fields)	
Save Back To Self-Award C	ertification

A notification message is shown once the self-award certification is successfully saved.

Home	Learning Center	Career Center	Workspace	Connect	Reports	
	and the second second					
SELF Your red	-AWARD CE	RTIFICATIC)N as been saved.			
Back 1	o Self-Award Certificatio	n				

Know that when a user is undergoing the self-awarding certification, the default Status of the certification is set to "Open for Editing". This allows the user to make changes to the certification until it is finalized for approval, when the Status is changed to "Pending for Approval". This triggers the approval process (sending the request to the direct appraiser) and details of the self-awarding certification can no longer be edited. Options of certification statuses are shown below:

Home Learning Center	Career Center Workspace Connect Reports
SELF-AWARD C	ERTIFICATION quest for the award of a predefined certification. Please note that certification details including attachment, are only editable when
Certification*:	Online Certification • • •
Status:	Open for Editing •
Comments:	Open for Editing Pending for Approval Cancelled
Issue Date*:	Aug 1, 2016
Expire Date:	Date
Attachment:	[Current File: www.t.pdf] Choose File No file chosen
(* Mandatory fields)	o Self-Award Certification

Once the self-awarding certification is saved, it is listed under user's self-award certification page as shown in Figure 5. The user has the ability to view/modify details of the self-awarded certification by clicking on the certification name. Remember that users are only allowed to make changes to their self-awarded certifications if their certifications have a status of "Open for Editing" or "Approval Denied". Below is a self-award certification has been listed at the "Self-Award Certification" page:

	Works	pace	Repo	orts A in u			
Contraction of the local division of the loc							
EDTIFICATIONS							
ERTIFICATIONS							
ertifications For Approval							
Status							
Status Open for Editing							
Status Open for Editing ▼							
Status Open for Editing						+ Self-Award Ce	ertification
Status Open for Editing	\$	Issue Date	*	Expiration Date	٥	+ Self-Award Co Comments	ertification
Status Open for Editing • rtification (T015Name (CRT015Code)	\$	Issue Date Jul 5, 2016	*	Expiration Date Jul 7, 2016	\$	+ Self-Award Co Comments This is CRT015	ertification \$

By clicking on the name of the self-awarded certification, a web form is generated as shown in Figure 6.

In cases where "Expire Date" is not entered at the time the self-award certification is saved, "Expire Date" is automatically calculated according to the default Expiry Date settings of the selected certification. If the user decides to cancel or even delete the self-awarded certification permanently, the user may update Status as "Cancelled" or click on the "Delete" button respectively. The screen below shows the Details of the self-award certification:

Home Learning Center	Career Center Workspace Connect Reports	
SELF-AWARD (This form may be used to re	RTIFICATION est for the award of a predefined certification. Please note that certification details including attachment, are only editable subplit the certification for approval please set Status as "Bending for Approval" and click on the "Save" or "Indates" buttor	when
Certification*:	Online Certification 💼 🖀	
Status: Comments:	Open for Editing Pending for Approval Consolided	
Issue Date*:	Aug 1, 2016	
Expire Date:	Date 🛗	
Attachment:	[Current File: www.t.pdf] Choose File No file chosen	
(* Mandatory fields)		
Update Delete Back	Self-Award Certification	

Please note that the "Self-Award Certification" button is only available for users who have "Unrestricted" access rights to "Certifications". Depending on access rights granted to users, users are able to view, do self-award certifications or update these certifications.

The Certification Awarding CSV Loader

The "Certification Awarding CSV Loader" supports this feature via the following:

1. IS_SELF_AWARDED - An indicator whether or not the certification is self-awarded 2. STATUS - An indicator of certification's current status; it also serves as a trigger for the approval process

3. ATTACHMENT_URL - A valid URL where the digital proof is saved and is accessible by NetDimensions Talent Suite without any additional authorization, such as Single Sign On (SSO) authorization.

Figure 8 illustrates the Guidelines for Using the Certification Awarding CSV Loader.

Guidelines For	Using The C	ertification Awarding CSV Loader	
Ensure that the data co	intained in the CSV	conforms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent data to be treated as a separate column.	
Enforce record duplica	tion checking if con	figured.	
Please refer to the No	tDimensions WIKI	for more details.	
CSV Data Formatting (as in downloadable	template)	
Field	Content	Data Handling	Default
USERID	User ID	Mandatory	None
CERTIFICATION_TITLE	Certification Name	Either a certification code or a certification name must be provided. If a certification code is not provided, the row will be skipped if more than one certificate matches the given cetification name.	None
CERTIFICATION_CODE	Certification Code	A unique value among certificates. Either a certification code or a certification name must be provided	None
DATE_ACHIEVED	Achievement date	Mandatory. If not specified, the record will be skipped. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration)	None
EXPIRE_DATE	Expire date	Optional. If not specified, it will be computed based on the certification validity period and the achievement date. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration)	Certification Validity Period
COMMENTS	Comments	Optional. Maximum 255 bytes. If more than that, record skipped and error reported.	None
IS_SELF_AWARDED	Is Self Award	Mandatory. Must be "Y" or "N". Y - Yee N - No	N
STATUS	Status	Conditional. When Is Self Award = """, Status is required. Must be "0", "1", "2", "3" or "4", 0 - Open for Editing 1 - Pending Approval 2 - Approved 3 - Approved 4 - Cancelled	None
ATTACHMENT_URL	Attachment Url	Optional. A valid URL for the attachment. Maximum 255 bytes. If more than that, record skipped and error reported. Maximum attachment size 5 megabytes e.g. http://www.abc.com/tect01.pdf or /nd/fresco/repository/tec.pdf	None

Figure 8 - Guidelines for Using the Certification Awarding CSV Loader

Viewing/handling of Certification Approval Requests by Direct Appraisers

Direct Appraisers are able to view/handle certification approval requests by navigating to **Workspace** > **Certification Approval**.

This name lists your direct amployees	
Participant	Title

Direct Appraisers are able to approve/deny any certification award request by updating its Status as shown below. In cases where "Expire Date" is not entered at the time the self-award certification is saved, the "Expire Date" is automatically calculated according to the default Expiry Date settings of the selected certification. If a certification approval request is no longer valid, the Direct Appraisers of the request can either Cancel or Delete the request permanently.

Home Learning Center	Career Center Workspace Connect Reports Teach
a self second second second	
SELF-AWARD CE	RTIFICATION APPROVAL
To approve or deny certificatio	n approval request, please change Status as "Approved" or "Approval Denied" respectively.
Castification	
Certification*:	Online Certification
Status:	Pending for Approval 🔻
Comments:	Pending for Approval Approved Approval Denied
have Bat at	
Issue Date*:	Aug 1, 2016
Expire Date:	(None)
Attachment:	[Current File: wwct.pdf]
Lindate Back To Self-Award	Cartification
Opulate Dack to Self-Award	

Certification Approval Role Access Control

In order for Direct Appraisers to approve certifications, their roles need to have "Unrestricted" access rights to "Certification Approval".

Self-Award Certifications - Approved

Once the self-award certificate is approved by the direct appraiser, the certificate details will appear in the Certifications Awarded page, Certifications Review page, and Certification page of the users CDC. The certificate is flagged as "Y" in column "Is Self-Awarded".

If digital proof is available, the "External Reference" column displays the file name of the file as a link to download the file:

.e Learnin	g Center Perso	nal Calendar	Career Cent	er Workspac	e Conn	ect Reports							
ertificatio	ons												
ertifications	Certifications for	Approval											
ertificatio	ons Awarde	To SPR/	ANO27 \$	Spunky									
Ptotuo													
Current Cer	tificates	·											
Certific	ation 🗘	Issued B	v 🗘	Issue Date	^	Expiration Date	٥	Comments	\$	Is Self Awarded	\$	External Reference	\$
Certific	ation 🗘	Issued By	⁄ ≎	Issue Date Aug 23, 2016	^	Expiration Date (none)	٥	Comments Online07 (EKP0000	\$ 00067)	Is Self Awarded	¢	External Reference	\$
Certific	ation 🗘 RT007 (CRT007) 4 (CRT014)	Issued By	v 0	Issue Date Aug 23, 2016 Aug 8, 2016	*	Expiration Date (none) (none)	\$	Comments Online07 (EKP0000 This is CRT014ssss	≎ 00067)	Is Self Awarded N Y	\$	External Reference N/A	\$

Here are the Approved Certificate in Certifications Review.

	nensio	ns Talent Suite	Manage Center					
OVE	RVIEW	LEARNING	TALENT COMMUNICATE	USERS REPORTS	SYSTEM			
Cer	tifica	tions Review						
					+ SHOW FILTERS			
								Results per Page:
Showi	ing: 1 - 1	10 of 69						« < 1 2 3 4
Bull	k Actior	1 •						
		Certification	✓ User	Organization	Expiration Date	Print		External Reference
	Φ	Online Certification	SPRANO27 spunky	ALL/UNASSIGNED	(none)		Υ	Z27885_Self_Award_Certification_v03.pdf
	φ.	CRT017	SPRANO27 spunky	ALL/UNASSIGNED	Aug 29, 2016 8:00 AM CST		Ν	
	•	CRT017	SPRANO27 spunky	ALL/UNASSIGNED	Aug 29, 2016 8:00 AM CST		Υ	
	•	CRT017	SPRANO27 spunky	ALL/UNASSIGNED	Aug 30, 2016 12:00 AM CST		Ν	
	•	CRT017	SPRANO27 spunky	ALL/UNASSIGNED	Aug 31, 2016 12:00 AM CST		Ν	
	۰.	CRT017	SPRANO27 spunky	ALL/UNASSIGNED	Aug 31, 2016 12:00 AM CST		Y	wwct.pdf
		CRT017	SPRANO23 spunky	ALL/UNASSIGNED	Aug 30, 2016 8:00 AM CST		Y	
	\$	CRT017	ADMINISTRATOR System	ALL/UNASSIGNED	(none)		N	
	0 0	CRT017 CRT017	ADMINISTRATOR System ADMINISTRATOR System	ALL/UNASSIGNED	(none) Aug 30, 2016 12:00 AM CST		N	

And these are the Approved Certificate via CDC:

SPRANO27 spunky	Cer	tifica	ations								
ID: spunky.sprano27	Cert	tificatio	ons Cert	ifications f	or Approval						
EMPLOYEE PROFILE	Sta	atus	Cortificator								
LEARNING CENTER		Juneni	Certificate.	>	•						
Summary										+ Award New Ce	rtification
Learning					≎ Issued By	▲ Issue Date	≎ Expiration		Is Self ≎ Awarded		
Certifications	•	2	CRT007	(CRT007)		Aug 23, 2016	(none)	Online07 (EKP000000067)	N	N/A	
Training Plan Learning Path	0	CR	T014 (CRT	014)		Aug 8, 2016	(none)	This is CRT014ssss	Y		
Progress Tracker	0	CR	T016 (CRT	016)		Aug 1, 2016	(none)	CRT016 Certification	Y	wwct.pdf	
Learning Group	0	On (Or	line Certific nline Certifi	ation cation)		Jul 5, 2016	(none)	zxcvb	Y	Z27885_Self_Award_Certifica	tion_v03.pdf
SCORM Global Objectives											
CAREER CENTER											

certificationsAwarded API

The API result is updated that Self-award Certificates are properly identified (<is_self_award> value Y) along with other awarded certificates. Also included is the file name of the digital proof and the URL to download the file if provided in the self-award certification approval process.



E-Signature for Certifications

An e-signature option, "Enable e-signature for Certification update/delete", is available to control whether e-signatures should be prompted for when modifying certifications. If this option is enabled, an e-signature is required when updating or deleting a certificate. Similar to other e-signatures, the associated meaning is not editable by the end user but can be customized by updating custom.properties and restarting the system.

Certification Editor		🗅 🖻 📽 🕷 🔊 🗙	
Certification Pool	Certification Details	Expiration/Renewal Policy Certificate	
General - CERT1	Update the fields as re and are not available fi Knowledge Center for Access control	required. Certifications marked CLOSED are only shown in user rec for new assignments. Also, the assigned exam (if any) is invoked fr r the course to which this certification is attached. Permissions	ords rom the
Refresh	Date Entered: Certification Code* Certification Name* Certification Pool Certification Type Current Status Issued By Certification Descript	CERT1	
	Award Message Assigned certification exam If the certification is at completion of the cour Save Delete	Select Select attached to a module/program, then: Certificates are typically award urse or, if there is an associated certification exam, on passing the o	ed on exam.

The e-signature information can be retrieved from the standard reports R505 and R506.

E-Signature for Awarding Certifications

Certification awarding can require an e-signature to verify the logged in user prior to awarding/deleting certifications and log these activities. A user who has permission to view Compliance Reports can view certification awarding related activities in reports R505 and R506.

To require/disable an e-signature for awarding certifications, turn on the "Enable e-signature for awarding/deleting User Certifications" setting for the relevant organization.

To Award a Certification, in the CDC, Learning Center Tab, Certifications, click the "Award New Certification" button.

NetDimensions Talent Suite	CDC							
ORG1_131F Org1_131G	Cer	tifications						
ID: org1_131	Sta	tus						
EMPLOYEE PROFILE	A	1. 1						
· LEARNING CENTRE								
Summary							+ Award New Cer	rtification
Enrolled Courses						0	Comments	0
Enrolment Requests	•	Cert One	NETD	28-Oct-2013	(none)		cc	
Records/Transcript								
Certifications								
Training Plan								
Learning Path								

After filling in the required information, click the "Award Certification" button. The system will ask for an e-signature.

NetDimensions	Talent Suite - Mozilla F	refox	
🛞 kennex-pc/ek	p/servlet/ekp?TX=ADDL	SERCERT&PX=Y&USERID=ekp00000026&SK=857146187	
Add Certif	fication for OF	RG1_131F Org1_131G (ORG1_131)	
Certification:	Cert One		
Issue Date:		= <i>></i>	
Comments:			
		E-Signature X	
		User ID:	
		Password:	
Award Certific	cation Close	Meaning: Award or Delete a user certificate	
	_		
		Sign & Award Certification Cancel	
		A	
×			SI କଳକଳକ 🔀

To delete an award, click the cog icon next to the certification you want to delete, and click "delete". The system will ask for an e-signature.

NetDimensions Talent Suite	CDC				
ORG1_131F Org1_131G	Certifications				
ID: org1_131	Status				
EMPLOYEE PROFILE	All				
LEARNING CENTRE					
Summary					+ Award New Certification
Enrolled Courses	Certification	Issued By	Issue Date	 Expiration Date 	Comments O
Enrolment Requests	Cert One	NETD	28-Oct-2013	(none)	cc
Records/Transcript	Delete	E-Signature	×		
Certifications		User ID: 1			
Training Plan		Password			
Learning Path		Fassword.			
Learning Group		Meaning: Award user	i or Delete a certificate		
Accounts					
SCORM Global Objectives			(d)		
CAREER CENTRE		Sign & Delete	Cancel		

The e-signature information can be retrieved from standard reports R505 and R506. In report R505, please be sure to select "Certification Users (certusers)" or "Certification Renewal (cert_renewal)" from the Audit Items list in order to view certification award activities

Configuring Certificate Award Attributes

Certificate Award Attributes can be configured under **Manage Center** > **LEARNING** > **CERTIFICATIO N MANAGER** > **Certificate Award Attributes** much like how Module, Session, and Transcript Attributes are set up:

OVERVIEW ELERINING	TALENT COMMUNICATE USERS	REPORTS SYSTEM		
Certificate Award Attribu	utes		0	
Bulk Action V			🖶 Print + Create Certificate Awa	rd Attribute
Attribute Code				
🔲 🏟 AB	Drop-down	Awarding Body	Awarding Body	
SN	Free Text	Serial Number	Serial Number	
Edit Delete				

You can do the following:

- + Create Certificate Award Attribute Create a Certificate Award Attribute.
- Edit under the Gear Icon Edit an existing Certificate Award Attribute.
- Delete under the Gear Icon Delete an existing Certificate Award Attribute.
- Permissions under the Gear Icon Set Permissions on an existing Certificate Award Attribute.

When creating or editing the attributes, the standard attribute data types are available in the **Type** field:

- Free Text
- Text Area
- Drop-down
- Numeric
- Check Box

• Date

Edit Certificate	Award Attribut	e for SN		
Attribute Code*				
SN				
Name 🚱				
Serial Number				
Free Text Property Text Area en printir Drop-down Numeric Checkbox Date	g or reporting			

Setting Certificate Award Attributes

If Certificate Award Attributes have been configured, they will be prompted for when awarding a certificate to a Learner:

Certification: Certified Accountancy (A) Issue Date: Jun 20, 2017 Comment (max. 255 characters): Certified Accountancy Awarding Body ACCA Serial Number 1234-5678-90	Certification: Certified Accountancy (A) Issue Date: Jun 20, 2017 Comment (max. 255 Characters): Awarding Body ACCA Serial Number 1234-5678-90	Select a certification for a	issignment below.	
ssue Date: Jun 20, 2017 © Comment (max. 255 haracters): Acca • Awarding Body Acca • Eerial Number 1234-5678-90	ssue Date: Jun 20, 2017 © Comment (max. 255 haracters): Avarding Body ACCA • Serial Number 1234-5678-90	Certification:	Certified Accountancy (A)	
Comment (max. 255 characters): Awarding Body ACCA Serial Number 1234-5678-90 Award Certification Close	Comment (max. 255 characters): Awarding Body ACCA AccA Serial Number 1234-5678-90	ssue Date:	Jun 20, 2017 😢	
Awarding Body ACCA Serial Number 1234-5678-90 Award Certification Close	Awarding Body ACCA Serial Number 1234-5678-90 Award Certification Close	Comment (max. 255 :haracters):		
Serial Number 1234-5678-90 Award Certification Close	Award Certification Close	Awarding Body	ACCA	10
Award Certification Close	Award Certification Close	Serial Number	1234-5678-90	
		Award Certification Ck	pse	

These can also be set when using the Awarded Certificates CSV Loader to import awards:

Ensure that the data conta column.	ained in the CSV conf	orms to the formatting required by the template as specified in the table below. Do not insert commas as these will cause subsequent (data to be treated as a separat
Enforce record duplication	checking if configure	d.	
Please refer to the NetDi	mensions WIKI for n	nore details.	
CSV Data Formatting (as	in downloadable temp	plate)	
		Data Handling	
ACTION	Action	"A" for Add or "D" for Delete	А
USERID	User ID	Mandatory	None
CERTIFICATION_TITLE	Certification Name	Either a certification code or a certification name must be provided. If a certification code is not provided, the row will be skipped if more than one certificate matches the given certification name.	None
CERTIFICATION_CODE	Certification Code	A unique value among certificates. Either a certification code or a certification name must be provided	None
AWARD_ID	Award ID	The Award ID of the certificate award (ignored for add/mandatory for delete)	Automatically generated when adding records
DATE_ACHIEVED	Achievement date	Mandatory. If not specified, the record will be skipped. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration)	None
EXPIRE_DATE	Expire date	Optional. If not specified, it will be computed based on the certification validity period and the achievement date. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration)	Certification Validity Period
~~~~~~	~~~~~~	غ g-thtp://www.avc.com/ee/10/par/ar/nu/frescoreposition/fe/par	~~~~~~~~~~
CT-SN	Certificate Award Attribute: SN	Any Text (Max field length:2,000) (*NONE* to clear)	None
CT-AB	Certificate Award Attribute: AB	AAT - AAT ACCA - ACCA CIMA - CIMA IASB - IASB ICAEW - ICAEW Other - Other (VIONE* to clear)	None

# **Certification Reports**

There are some standard reports relating to Certifications:



### You can also report on the following columns in the Report Wizard:

Column	Column Set	Description
Certification Code	Certifications	The Certification Code
Certification ID	Certifications	The Certification ID Number
Certificate Name	Certifications	The Certification Name
Туре	Certifications	The Certification Type
Primary Language	Certifications	The Certification Primary Language

Status	Certifications	"Active" or "Inactive" depending on the Certification Status
Issued By	Certifications	The issuing party for the Certification
Description	Certifications	The Certification Description
Certification Pool	Certifications	The pool to which the Certification belongs
[Attribute Name]	Certificate Award Attributes	Value entered for the "[Attribute Name]" Certificate Award Attribute
[Drop Down Attribute Name] - Code	Certificate Award Attributes	Value entered for the "[Drop Down Attribute Name] - Code" Certificate Award Attribute
[Drop Down Attribute Name] - Label	Certificate Award Attributes	Value entered for the "[Drop Down Attribute Name] - Label" Certificate Award Attribute

You can also filter the data based on the above column values. For example, a Learner's current certifications can be viewed by selecting and Adding from **Filter**:

- Certifications Status Equals "Active"
- Awarded Certificate Latest Award Equals "Yes"

Report ID: Certification         Properties       Columns       Grouping       Order       Filters       Summary         Save       Indo         Select the criteria by which your records will be returned.         Filter       Select         Columns       Operators       Values         Business Unit Details-User and Organization Sibility-Equals       Users and Organization Sibility Equals       User executing user's current PID         Quefic Order Officiate-Latest Award       Equals       Yes       Outers         Outer for the outer of the o	Cancel Report	L _o
Properties     Columns     Grouping     Order     Filters     Summary       Save     Undo   Select the criteria by which your records will be returned. Filter: Select  Columns Operators Values Business Unit Details-User and Organization Visibility Equals Users and Organization filtered based on User executing the report Details User Properties-User ID Equals User executing user's current PID Details Edit User Properties-User ID Equals Ves Columns Column Secure Properties Column Column Column Secure Properties Column Co	Report ID: Certification	
Save Undo Select the criteria by which your records will be returned. Filter: Select Columns Column	Properties Columns Grouping Order	Filters Summary
Select the criteria by which your records will be returned.         Filter:       Select       Values         Columns       Operators       Values         Business Unit Details-User ID       Equals       Users and Organization filtered based on User executing the report       Deleters       Edit         Variande Certificate-Latest Award       Equals       Yes       Deleters       Edit	Save Undo	
Columns         Operators         Values           Business Unit Details-User and Organization Visibility-Equals         Users and Organizations filtered based on User executing the report         Dates           User Properties-User ID         Equals         User securing user's current PID         Dates         Edit           Avanded Certificate-Latest Award         Equals         Yes         Dates         Edit	Select the criteria by which your records will Filter. Select	The returned.
Business Unit Details-User and Organization VisibilityEquals     Users and Organizations filtered based on User executing the report     Edit       Jser Properties-User ID     Equals     Use executing user's current PID     Doteto     Edit       Warded Certificate-Latest Award     Equals     Yes     Doteto     Edit	Columns	Operators Values
User Properties-User ID         Equals         Use executing user's current PID         Delete         Edit           Avanded Certificate-Latest Award         Equals         Yes         Delete         Edit	Business Unit Details-User and Organization Vis	isibilityEquals Users and Organizations filtered based on User executing the report Delete Edit
Awarded Certificate-Latest Award Equals Yes Delete Edit	Jser Properties-User ID	Equals Use executing user's current PID Delete Edit
Contifications Otation	Awarded Certificate-Latest Award	Equals Yes Delete Edit
Leftinications-Status Equais Active Delete Con	Certifications-Status	Equals Active Delete Edit
	Save Undo	
Save Undo		
Savo Undo		
Save Undo		

# **Proficiency Levels**

(available for Performance and Learning only)

### **Creating a New Proficiency Level Group**

To add a new proficiency level group, go to **Manage Center > Talent >** *Competency Manager >* **Profic iency Levels.** This leads you to *Proficiency Level* screen. On the **Proficiency Levels** section, click the Competency Manager

**Competency Manager** 

**Plus** button. A new entry field for the proficiency level group appears on the bottom of the proficiency level group list. Enter the name of the new proficiency level group and then press enter. The new proficiency level group will be added on the list.

Competency Manager			
Library Competency Models Proficiency Let	vels Job Profiles	Assessment Management	User Search
Proficiency Levels +	🖬 Save All		
All Add Catalog	+ Level*	Level Title*	Description*
Default Level Group	Note: Proficiency le	evels are ordered from lowest to	) highest in the scale.
<			

### **Renaming the Proficiency Level Group**

On the **Proficiency Levels** tab of the **Competency Manager**, click the proficiency level group you want to rename. Click the **Tools** menu and then select **Rename**.

oomp	cterrey manager					
Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Profici	ency Levels 🛛 🕂		Save All			
a 📗 A	II Rename		+ Level*	Level Title*	Description*	
-	Default Level Group National Occupational S	tandard No	te: Proficiency le	vels are ordered from lowest to	highest in the scale.	
-		F.				

The selected proficiency level group will be editable. Start modifying the proficiency level group name and then press enter.

ibrary Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search
Proficiency Levels +		Save All		
a 📗 All		+ Level*	Level Title*	Description*
Default Level Group	Note	e: Proficiency le	vels are ordered from lowest to	o highest in the s

### Setting a Proficiency Level Group as the Default

On the **Proficiency Levels** tab of the **Competency Manager**, click the proficiency level group you want to set as default. Click the **Tools** menu and then select **Mark as default**.

Comp	etency Manage	t				
Library	Competency Models	Proficiency Levels	Job P	rofiles	Assessment Management	User Search
Proficie	ency Levels 🔫		Save A	All		
4 📑 A	II Rename		Ŧ	Level*	Level Title*	Description*
•	Default Le Mark as defa National Occupational C	ult tanuaru	¢	1	Fundamental Awareness	Common Knowledge and und techniques and concepts

Note: The default proficiency level group must have at least one level therefore:

- A proficiency level group with no levels cannot be marked as default.
- You cannot delete the last remaining level in a proficiency level group that has been marked as default.

### Adding a New Levels to the Proficiency Level Group

To add a new level, click the **Proficiency Level Group** where the new level will be added. On the left table, click the **Plus** sign link.

Manage >

**Competency Manager** 

Library Competency Models Proficienc	y Levels Job Profiles	Assessment Manag	ement User Search	
Proficiency Levels + - * •	Save All  Level	Level Title	Description	
All     Default Level Group     National Occupational Standards     Sample	Note: Proficiency levels	are ordered from lowe	est to highest in the scale.	

A new entry fields are displayed. Provide the required parameters.

Manage >

**Competency Manager** 

Library	Competency Models	Proficiency Level	s Jol	Profiles	Asse	essment Management	User Search	
Proficie	ency Levels 🕂 🗕	* • E	Save A					
4 [ A		_	+	Level		Level Title	Description	Ĩ
	) Default Level Group   National Occupational Star   Sample	ndards	¢					
4		F						
		Note	: Profici	ency levels	s are or	rdered from lowest to h	ighest in the scale.	

Click the Gear icon and then select the Save button.

Manage >

Competency Manager

Library Competency Models Profici	ency Levels	Job Profiles	Assessment Management	User Search
Proficiency Levels + - * -		ave All		
a 👔 All		+ Level	Level Title	Description
🚛 Default Level Group 间 National Occupational Standards		•	Provide leadership	Ensures lifetime consumer
📗 Sample	F	Add		
	Note: F	Save	from lowest to I	nighest in the scale.

Note: To add another level, click the Plus sign link or click the Tools icon and then select Add

Manage >

Competency Manager

Library Competency Models Proficie	ncy Levels	Job Profiles	Assessment Management	User Search
Proficiency Levels + - * -	<b>8</b> S	ave All		
a 🗊 All		+ Level	Level Title	Description
🚛 Default Level Group 📄 National Occupational Standards 📄 Sample		<b>¢</b> 1	Provide leadership	Ensures lifetime consumer relationship
< Contract of the second secon	Note: P	Edit Delete	from lowest to h	ighest in the scale.

### **Editing a Proficiency Level**

To edit a proficiency level, select the Proficiency Level group where the proficiency level you want to edit is located. Click the **Gear** icon of the proficiency level you want to modify and then select **Edit**.

Manage >

**Competency Manager** 

ibrary Competency Models Proficient	cy Levels	Job	Profiles	Assessment Management	User Search
Proficiency Levels + - * *		+	Level	Level Title	Description
Default Level Group National Occupational Standards		¢	1	Provide leadership	Ensures lifetime consumer relationship
	Note: F	Edit Dele	te	from lowest to h	nighest in the scale.

The proficiency level you want to modify will be editable. Start modifying the proficiency level.

After modifying the proficiency level, click the Save button to keep the changes.

Aanage >			
Competency Manager			
Library Competency Models Proficienc	y Levels Job Profiles	Assessment Management	User Search
Proficiency Levels + - * -	B Save All	_	
a 📋 All	+ Level	Level Title	Description
Default Level Group  National Occupational Standards  Sample	<b>•</b> 1	Provide leadership	Ensures lifetime consumer relationship
• •	Add		
	Note: P Delete Cancel	from lowest to h	ighest in the scale.

### **Permissions on Proficiency Level Scales**

Permissions checking is available in the feature. Note that user actions will be restricted by privileges granted on the Proficiency Level Scales.

### **Read Permission**

- View the detail of Proficiency Level Scales in Competency Manager > Proficiency Levels
- Selectable when add/edit Competency in Competency Manager > Competency Model

#### **Unrestricted Permission**

- Add/edit/delete levels in Competency Manager > Proficiency Levels
- Rename/delete Proficiency Level Scale
- Assign/un-assign default Proficiency Level Scale

### **Competency Manager**

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Manage	ment	User Search
Proficie	ency Levels	+ - * *	Level*	Level Title*	Descrip	otion*
4 頂 A	11		1	1	1	
	Default Level Group		2	2	2	
	Proficiency Level Proficiency Level 2		Note: Proficienc	y levels are ordered from	m lowest	t to highest in the scale.
4		h.				

Log-in user with read permission sees limited Proficiency Level Scales with limited actions

### Competency Manager

Library Competency Models Proficiency Levels	Job Profiles	s Assessme	ent Management	User Search
Proficiency Levels	🖬 Save al	1		
All Rename	•		Level Title*	Description*
I Default Level Mark as default	÷ 🔅	1	1	1
My Proficienc Permissions     Proficiency Le	÷ 🔅	2	2	2
Proficiency Level 2	Note: Proficie	ency levels are	ordered from lowest	to highest in the scale.

Log-in user with unrestricted permission can perform more actions

### Note:

- Assuming Proficiency Level Scale A associated with Competency X, logged-in user without permission on Proficiency Level Scale A can still see it when editing Competency X. However, he/she would not be able to associate it again, once having selected another Proficiency Level Scale.
- Default Proficiency Level Scale is always available when adding/editing a competency.
- Setting a Proficiency Level Scale as default requires unrestricted permissions on **both** the new and existing Proficiency Level Scales.

### **Deleting a Proficiency Level**

Select the Proficiency Level group where the proficiency level you want to remove is located. Click the Tool icon of the proficiency level you want to remove and then select Delete.

Manage >

Competency Manager							
Library Competency Models Proficience	y Levels	Job F	Profiles	Assessme	ent Management	User Search	
Proficiency Levels + - * -	🖶 S	Save All					
a 📋 All		+		Leve		Description	
Default Level Group National Occupational Standards	1	٥	1	Prov	ide leadership	Ensures lifetime consumer relationship	
( bampie	► Note: F	Add ote: P Edit			from lowest to h	ighest in the scale.	
		Delet	e				

A confirmation box is displayed. Click **OK** to delete the level, otherwise click **Cancel** to retain the level.

### **Changing the Sequence Order of the Proficiency Level**

The sequence order of the proficiency level can be modified by using the drag and drop functionality. To do this:

- Position your mouse to the Gear icon of the proficiency level you want to move.
- · Press, and hold down, the button on the mouse to "grab" the object.
- "Drag" the object to the desired location, then "Drop" the object by releasing the button.

#### **Competency Manager**

Library	Competency Models	Proficiency Levels	Jol	o Profiles	Assessment Management	User Search
Proficien	cy Levels 🕂 🗖		Save A	JI		
a 🚺 All			+	Level	Level Title	Description
	Default Level Group National Occupational St Sample	tandards	٠	1	Provide leadership for your organisation	Ensures lifetime consumer relationship
4		t.	٥	2	Provide leadership for your organisation	Sample

# Competencies

(available for Performance and Learning only)

This section details the procedures and functionalities of the Competency Models tab on the Competency Manager. On Competency Models tab, user can do the following tasks:

- · Viewing the Competency Model Categories
- Creating a New Competency Model Category
- Renaming the Competency Model Category
- Removing the Competency Model Category
- Setting the Permissions to Competency Category
- Uploading Competency Data
- Mapping the Competency Model to a Job Profile (see the Map the Competency to a Job Profile)
- Cloning the Competency Skills

# **Competency Models**

### Viewing the Competency Model Categories

Competency models are presented in a hierarchical view. A competency model can be expanded to reveal the sub competency model, if any exist, and collapsed to hide the sub competency model



### **Creating a Competency Model Category**

To add a new competency model category:

1. Using the competency model hierarchical view, select the model where the new competency model will be added.

2. Click the Add button.



A text box will be displayed. Enter the name of the new competency model and then press Enter.

Competency N	Manager
--------------	---------

Library Competency Models	Proficiency Levels	Job P	rofiles Assessment Management Us	ser Search		
	P	ulk Act	ion 💌		🕞 Groups 🕇 🕇	Create Competency
Competency Models +	- • •		Competency Name			^
🖌 📗 Models		۰	Facilitating Change			
Engineering		¢	Lathe Operations			
Training		٥	Systems installation/decommissioning			
< iranıng	•	٥	Systems integration			

The new competency model would be added.

### **Renaming a Competency Model**

To rename a competency model: Using the competency model hierarchical view, select the competency model you want to rename. Click the **Gear** icon and select the **Rename selected**.

OVERVIEW LEARNING	TALENT COMM	UNICATE US	SERS REPORTS	SYSTEM			
Competency Manag	jer						
Library Competency Model	s Proficiency Leve	s Job Profile	Assessment M	anagement	User Search		
Competency Models +		Con	npetency Name			Groups	+ Create Competency
Models Rename	selected mcy Data Loader			There are i	no items to displ	lay.	

The selected competency model will be editable. Rename the competency model and then press Enter

OVERVIEW	LEARNING	TALENT	COMMUNICA	re user	RS REPORTS	SYSTEM	1		
Compete	ncy Mana	ger							
Library C	ompetency Mode	els Proficie	ncy Levels J	ob Profiles	Assessment Mana	igement	User Search		
			P					🖻 Groups	+ Create Competency
Competen	cy Models	+ - •		Compe	tency Name				~
Mode	ls gineering reral aining					There are	no items to disp	play.	

### **Deleting a Competency Model**

Select the competency model you want to remove. Click the Delete Competency Model.

OVERVIEW	LEARNING	TALENT COMMUN	ICATE USEF	RS REPORTS SYSTE	М	
Compete	ncy Manage	er				
Library	ompetency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Comneten	w Models		Compe	tency Name		🕞 Groups 🛛 🕂 Create Competency
Mode	ls gineering Dept1 neral	Delete Competency	Model	There ar	e no items to dis	iplay.

A confirmation message will be displayed, click **OK** to remove the selected competency model, otherwise, click the **Cancel** button to cancel the deletion of the competency model

### Setting Permissions on a Competency Model

Using the competency model hierarchical view, select the competency model where the permission will be set. Click the **Tool** button and then select the **Permissions** option to launch the Permissions Selector.

OVERVIEW LEARNI	NG TALENT	COMMUNICATE	USERS REPORTS	SYSTEM		
Competency Ma	anager					
Library Competency	Models Proficie	ncy Levels Job Pro	ofiles Assessment Mana	gement User Search		
		Bulk Actic	on 💌		🕞 Groups 🔒	<ul> <li>Create Competency</li> </ul>
<b>Competency Models</b>		-	Competency Name			*
🖌 🧊 Models 🛛 Ri	ename selected	•	Training Competency			
A Engineerir Mi	ap Model to Job Profi	le				
General	ermissions					
🧵 Training C	ompetency Data Loa	der				
×.		F				

On the permission selector you can set the following:

- Select the type of permission to be given.
- Tick the Everyone box only if you want to give permission to everyone.
- Click the **Users** link to select a specific user or users to whom the permission access will be given. This will open the *Selector* menu.
- All user selected from the Selector menu will be displayed on the box next to the Users link.
- In addition to the selected users, view permission can also be granted to anyone who meets the following criteria:
  - All of the following criteria. This means that viewing permission can be granted to all users belongs to the criteria defined in the Add criteria selector. For instance the user added the criteria Role and Organization, this means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.
  - One of the following criteria. This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector. For instance the added the criteria Role and Organziation, this means that the user must belong to the role OR organization in order for the user to access the permission to view the report.
- To add a criterion, click the selector dropdown button, select the preferred criteria and then click the Go button.

**Note:** For every selected criterion, a criterion box will be displayed. To select a specific user, group or organization that belongs to the criteria, click the link positioned at the right top of each box.

• Click the Save button to save the setting. Click Close button to exit on this window.

### Competencies

### **Creating a Competency**

Select the model where the new competency will be added. Click Create Competency.



Please refer to the Sub-sections "*The Details Tab*" and "*The User Review Tab*" under "*Editing Competencies*" in this document regarding configuring the Competency Model.

### **Removing a Competency**

To remove a competency from a model: Under the list of competency, tick the box of the competency you want to remove. Click the **Bulk Action** button and then select **Delete**.

Competency Manager		
Library Competency Models Proficiency Lev	vels Job Profiles Assessment Management User Search	
P	Bulk Action	🕞 Groups 🕂 Create Competency
Competency Models 💶 📼	Bulk Action Delete	*
🖌 📜 Models	Clone hange	
<ul> <li>Engineering</li> <li>Dept1</li> </ul>	Lathe Operations	
General	Systems installation/decommissioning	
<	Systems integration	
	🔽 💠 Systems integration(1)	

A message will be displayed on the screen. Click **Ok** to delete the selected competency, otherwise, click **Cancel**.

### **Cloning a Competency**

To clone a competency: Under the list of competency, tick the box of the competency you want to clone. Click the **Bulk Action** button and then select **Clone**.

#### **Competency Manager**

Library Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search			
		Bulk Action			🕞 Groups 🕒	► Create Competency	
Competency Models +		Bulk Action Delete	Vame			~	
<ul> <li>Models</li> <li>Engineering</li> </ul>		Clone Map to Job Profil	e				
Dept1	E	Lathe Operations					
General Training		Systems installation/decommissioning					
<	•	🖞 🗢 System	ns integration				

### **Editing a Competency**

To open a Competency for editing:

- 1. Select the model associated with the Competency to be edited.
- 2. On the right side of the screen, either click the Competency Name directly, or click the Cog icon

🔅 and then select Edit competency from the menu.

Opening a competency in the Competency Manager will give you access to:

- Competency Details, where you can edit the Competency settings
- User Review, where you can review competency awards

The Competency Settings are categorized into the following sections:

- Competency Details
- Proficiency Level
- Recognition Policy
- Learning Modules
- Notification Settings
- Job Profiles

Save, Delete, Clone, and Cancel buttons are available at the bottom of the screen.

### **Competency Details**

You can specify the following properties for each Competency:

- Reference Code
- Title
- Model
- Source Library
- Description
- Language
- Active

	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
OVERWIEN	ELANING	IN LEIGH	COMMONIE	OOLIKO	INEI OINTO	OTOTEM	
ingineering >							
Basic Math	s						
Details User	Review						
COMPETE	NCY DETAILS						
Reference Coo	de*						
BM							
Title*							
Basic Maths							
Model							
Engineering							
Source Library							
 Description (m	aximum 6,000 cha	aracters)					
Description (m	aximum 6,000 cha	aracters)	• = • = •	- A - A	✓ ⁽¹⁾	>	
Description (m	aximum 6,000 cha	aracters) ▼ 10pt	• = • = •	<u>A</u> • <u>A</u>	• 🙂 🖪 🤇	>	
BIU	aximum 6,000 cha <del>S</del> Arial	aracters) ← 10pt	• 🗄 • 🗄 •	<u>A</u> • <u>A</u>	- ☺ 🖪 <	>	
BIU	aximum 6,000 cha	aracters)	• ≣ • ≝ •	<u>A</u> • A	• © 🖬 <	>	
BIU	aximum 6,000 cha <del>S</del> Arial	aracters)	- ≣ - ≣ -	<u>A</u> • A	<ul> <li>♥</li> <li>♥</li></ul>	>	
BIU	aximum 6,000 cha	aracters)		<u>A</u> • A	- ☺ ⊾ <	>	
Language	aximum 6,000 cha	aracters) ← 10pt	<ul> <li>→ Ξ → Ξ →</li> </ul>	<u>A</u> • <u>A</u>	▼ ☺ ► <	>	
Language	aximum 6,000 cha <del>S</del> Arial ge	aracters) ✓ 10pt		<u>A</u> • <u>A</u>	▼ ☺ ⊾ <	>	
Language Multi-Langua	aximum 6,000 cha <del>S</del> Arial ge	<ul> <li>✓ 10pt</li> <li>✓</li> </ul>		<u>A</u> • A	✓ ☺ ▲	>	
Language Multi-Langua	aximum 6,000 cha <u><del>S</del></u> Arial ge	<ul> <li>aracters)</li> <li>✓ 10pt</li> </ul>		<u>A</u> • A	- ☺ ► <	>	
Language Multi-Langua	aximum 6,000 cha <del>S</del> Arial ge	aracters) ← 10pt		<u>A</u> • <u>A</u>	▼ ⊕	>	
Description (m B I U Language Multi-Langua ✓ Active PROFICIEI	aximum 6,000 cha <u>S</u> Arial ge NCY LEVEL	aracters) ▼ 10pt	<ul> <li>→ iΞ → iΞ →</li> </ul>	- <u>A</u> - <u>A</u>	✓ ⁽¹⁾ ⁽¹⁾ ⁽¹⁾	>	
Description (m B I 및 Language Multi-Langua ✓ Active PROFICIEN Level Group:	aximum 6,000 cha <u>S</u> Arial ge NCY LEVEL Mace	Taracters) ▼ 10pt		<u>A</u> • A		>	
Description (m B I U Language Multi-Langua ✓ Active PROFICIEI Level Group: Level Code	aximum 6,000 cha S Arial ge NCY LEVEL Mace A Leve	aracters)		<u>A</u> • A		>	

# **Proficiency Level**

PROFICI		)	
Level Group	Effective Behaviour	Level: Add 🔻	
Level	Default	Description	
Code	Effective Behaviour		_
1	Leistungsniveau	Displays effective behaviour never	
	Mace		
2	Mechanix Proficiency Level	Displays effective behaviour occasionally	
P	Proficiency		Î
3	Questionair	Displays effective behaviour about balf of the time	
R	Rob's scale	Displays checking bond tour about hair of the time	Û
4 Sales	Sales		
	Sample Proficiency Scale	2	Ē
	Level Title 🖌	Displays effective behaviour always	
5	5		

There may be multiple Proficiency Level Scales available in the system. In this section, you can

- 1. Specify which Proficiency Level Scale is appropriate for this Competency
- 2. Customize the Level Titles and Descriptions for the Competency
- 3. Add/Remove individual levels as necessary for the competency

### **Recognition Policy**

There are 4 different methods by which a Competency can be acquired by a learner:

Acquisition Method	Туре	Description
Training	Formal	Competency is automatically awarded to learners based on training records
(Deploy) Assessment	Formal	Competency is automatically awarded to learners based on the outputs of a Competency Assessment
Ad-hoc Self Assessment	Ad-hoc	Learners can award the Competency to him/herself via Career Development Center
Ad-hoc Reviewer Assessment	Ad-hoc	Reviewers can award the Competency to Learners via Review Career Development Center

These should be checked as necessary for the Competency:

If Training is enabled, you can specify how many of the selected courses need to be complete in order to acquire the competency

- If ALL is specified, you can select the Proficiency Level to be awarded on completing the final module here
- If not all modules are required, you can specify the Proficiency Level to be awarded per module in the Learning Modules section

If any of the Ad-hoc methods are enabled, you can specify

- A minimum Waiting Period before another Ad-hoc Assessment can be performed
- If the ad-hoc assessment should expire and if so, to require the assessor to provide an expiry date or to calculate an expiry date relative to the award date.

### **Learning Modules**
#### In this section, you can

- 1. Add courses that are relevant to the competency
- 2. Configure the following per course
  - a. Mandatory for Training: Should be checked if learners must complete the course before Competency is awarded via Training
  - b. Required Revision, "Any" if no particular revision is required, "Effective" if only completing the effective revision will result in Competency award via Training
  - c. Validity Period, a period of time after course completion after which the learner must retake the course in order to retain/reaquire the competency
- 3. Specify Competency Revocation Settings

## **Competency Revocation Settings**

Sometimes, the intention is for Learners to lose the Competency if they no longer meet the completion requirements under one of the following circumstances:

LEARNING	MODULES	- 6		
				3
Learning Mod	ules		Q	9
Mandatory (for Training)	Title	Learning ID	Revision	Valid for
:	Maths 101	MOD-0170	Any 🔻	365 Day(s) ▼
Revoke com the effective rev Revoke a	petency when manda /ision is published t next Auto Competer	tory training material is ncy Revocation Task	added to competency or whe	en new revisions of mandatory training requiring
Revoke a	fter a grace period of	30 Day(s) •		
For mandato	ry modules, apply a r	enewal period and auto	matically re-enroll learners	14 Day(s) • prior to module expiration
During the rene	wal period, on comple	etion of the learning mo	dule apply the validity period	from
the date of c	ompletion of the learn	ing module		
the previous	module expiration da	te		

- The addition of a new mandatory module to the Competency
- The publication of a new revision of a mandatory module
- The Mandatory (for Training) setting is checked for an existing module

To enforce the above:

- The Revoke competency when mandatory training material is added to competency or when new revisions of mandatory training requiring the effective revision is published ch eckbox should be checked
- If you would like to grant Learners a chance to complete the required learning before losing the competency, you can specify a grace period. If not, select Revoke at next Auto Competency Revocation Task

When working with Validity Periods, sometimes the intention is for Learners to only renew the training within, for example, 30 days of expiry. To enforce this:

- 1. Set For mandatory modules, apply a renewal period and automatically re-enroll learners 30 Day(s) prior to module expiration
- 2. If the learner retakes the training during the renewal period, you can opt to calculate the new Validity Period based on
  - the date of completion of the learning module
  - the previous module expiration date

Renewals & Expiration/Revocation Notifications for Currently Assigned Job Profiles only The Process competency renewals and expiration/revocation notifications only for currently assigned job profiles Setting under System Configuration > Competency Manager determines if learners are only sent competency related notifications relevant to their currently assigned job profiles.

- When checked, only those notifications of the competencies that are part of a job profile currently assigned to the learners will be sent. Also, enrollment renewals will only be performed for modules related to these competencies.
- When unchecked, these notifications will be sent as long as the learners have the competencies. Enrollment renewals for competencies will be performed irrespective of the currently assigned job profiles.

## **Notification Settings**

The **NOTIFICATION SETTINGS** section is for configuring reminder-related settings.

- Send reminder _____ day(s) before learning modules expire.: If a notification email is to be sent to the Learners before the learning modules expire; enter the number of day(s) into the text box.
- Send notification when this competency has entered the grace period or has been revoke d.: Check it if a notification email is required for the described situations.

NOTIFICATION SE	TTINGS
Send reminder 14	day(s) before learning modules expire.
Send notification whe	en this competency has entered the grace period or has been revoked. ${old O}$

## **Job Profiles**

The Job Profile(s) mapped to the Competency are listed in this Section.

Click the desired Job Profile in the **Job Profile Name** Column to launch its **Job Profiles** Editor. Please refer to the Section "Job Profiles" in this document for operating details.

JOB PROFILES		
Job Profile Name	<ul> <li>Catalog</li> </ul>	\$
Engineer	Production	

# **Edit Competency User Review**

This Tab lists the Learners awarded with the selected competency.

NetD	imensio	ons Talent Suite	Manage C	enter				<b>4</b>	YEUNG Kiu-Nei
OVER	VIEW	LEARNING	TALENT CO	MMUNICATE	USERS	5	REPORTS	SYSTEM	
Enginee	ering →								
Basio	c Math	S							
Details	User	Review							
								Re	sults per Page: 1
Showing	g: 1 - 9 of	9						_	
Bulk A	Action	•							<ul> <li>Award Competer</li> </ul>
•		ame (ID)				Level Title (Code)	✦ Acquisition Method	Content Acquisition	Assigned By (II)
	¢ (E	DWARDO Sanchez DWARDO.SANCHEZ	) 0		5	5 (5)	Training	Jul 24, 2015 9:24 AM HKT	ADMINISTRAT System (NDAD
	¢ F	INCH Violet (VIOLET.F	INCH)		5	5 (5)	Training	Jul 16, 2015 10:03 AM HKT	ADMINISTRAT
	G (J	ARDNER Jen EN.GARDNER)	0		5	5 (5)	Training	Jul 24, 2015 10:31 AM HKT	ADMINISTRAT
	🌣 ()	ASTING Yvonne ′VONNE.HASTING)	0		5	5 (5)	Training	Jul 16, 2015 10:03 AM HKT	ADMINISTRAT
	¢ (2	AW Zechariah (ECHARIAH.LAW)	0		5	5 (5)	Training	Jul 16, 2015 10:03 AM HKT	ADMINISTRAT
	🌣 (F	CDONALD Fin IN.MCDONALD)	0		5	5 (5)	Training	Jul 24, 2015 9:51 AM HKT	ADMINISTRAT System (NDAD
		ICHON Xavier (AVIER.MICHON)	0		5	5 (5)	Training	Jul 16, 2015 10:03 AM HKT	ADMINISTRAT
	¢ (E	INGER Barry 3ARRY.SINGER)	0		5	5 (5)	Training	Jul 16, 2015 12:26 PM HKT	ADMINISTRAT
	-					5 (5)	Training	Jul 24, 2015	ADMINISTRAT

Showing: 1 - 9 of 9

NetDimensions

# Awarding the Competency

To award the Competency, click + Award Competency to launch the 4-step flow:

1. In the first step, select the **Proficiency Level** to be awarded then click **Next**.

Engineering	>							
Basic M	aths							
Details	Jser Rev	iew						
								Results per Page: 10 V
Showing: 1 -	9 of 9							
Bulk Action	n	T						+ Award Competency
•								\$ Assigned By (ID) \$
Ø	EDWA (EDW)	RDO Sanchez ARDO.SANCHEZ)	0		5 (5)	Training	Jul 24, 2015 9:24 AM HK	ADMINISTRATOR T System (NDADMIN)
•	Aw	ard Compete	ncy _					Stem (NDADMIN)
•		0		Colort Linera C	anfirm Aurord	Auged	•	<ul> <li>MINISTRATOR stem (NDADMIN)</li> </ul>
•	Prof	iciency Level *		Select Users C	omin Award	Awaru	Successiui	MINISTRATOR stem (NDADMIN)
•		Level Code	Title	Description				
	0	1	1	No knowledge or experience	e			
•	$\circ$	2	2	Awareness (needs direction	)			stem (NDADMIN)
	0	3	3	Understanding (application	but needs som	e support)		MINISTRATOR
	۲	4	4	Good (confident)				stem (NDADMIN)
•	0	5	5	Competent (expert - no guid	Jance)			stem (NDADMIN)
•	-							✓ MINISTRATOR stem (NDADMIN)
Showing: 1 -	9 of 9	ext Cancel						

2. In the **Provide Details** Step, select the Learners using the inline or advanced user selector then, optionally provide an expiry date, click **Next**.

Select Level	Provide Details	Confirm Award	Award Successful
Jsers*	3 selected		
Alex Parker (ALEX.PARKER)×			
Barry Singer (BARRY.SINGER)	×	1	
Carrie Law (CARRIE.LAW)×			
Search for a user			
xpiry			
Dec 31, 2018 🛞			

3. In the Confirm Award Step, a summary of the competency awards to be performed is displayed. If a Learner has already had the Competency, the current level will be shown in the C urrent Level Title (Code) Column, and the change in level due to this award will be displayed in Change. Verify the Name List and click Confirm to proceed or Back to edit the List.

Select Level	Provide Details	Confirm Award	Award Successful
Competency Name:	Communications		
Award Level:	Intermediate (3)		
Expiry Date:	Dec 31, 2018		
Name (ID)		Current Level Title (Code)	Change
Alex Parker (ALEX.PA	ARKER)		N/A
Barry Singer (BARRY	SINGER)		N/A
Carrie Law (CARRIE.	LAW)	Advanced (4)	-1

4. In the Award Successful Step, a summary of the awards will be displayed.

Award Competency			
•	•	•	•
Select Level	Select Users	Confirm Award	Award Successful
Competency Name:	Basic Maths		
Award Level:	4 (4)		
03013.	Adrian (MD_ADRIAN), (ZCORP_BEN)	LEARNER Ali (ALILEARNER	, HOWARD Ben
Close			
Close			

5. On clicking **Close**, the list of Competency Awards will be updated.

# **Revoking the Competency**

Engir	ieering >						
Bas	sic Ma	aths					
Det	ails	lser Review					
						Res	ults per Page: 10 🔻
Show	ing: 1 - 1	10 of 14					< 1 2 > »
Bu	k Action	• _0				+	Award Competency
Bul Re	k Action voke Cor	npetency	Proficiency Level	Level Title (Code)	Acquisition Method	Acquisition Date	Assigned By (ID)  �
	0	EDWARDO Sanchez (EDWARDO.SANCHEZ)	0	5 5 (5)	Training	Jul 24, 2015 9:24 AM HKT	ADMINISTRATOR System (NDADMIN)
	0	FINCUICIDET.FINCH)	0	5 (5)	Training	Jul 16, 2015 10:03 AM HKT	ADMINISTRATOR System (NDADMIN)
	٥	FOX Adam (ADAM.FOX)	0	5 3 (3)	Ad-hoc Assessment	Sep 12, 2017 2:23 PM HKT	LEUNG Yiu-Kei (NETD_YK)
	Rev	oke Competency (JEN.GARDNER)	0	5 5 (5)	Training	Jul 24, 2015 10:31 AM HKT	ADMINISTRATOR System (NDADMIN)
	٥	HASTING Yvonne (YVONNE.HASTING)	0	5 5 (5)	Training	Jul 16, 2015 10:03 AM HKT	ADMINISTRATOR System (NDADMIN)
	٥	HOWARD Ben (ZCORP_BEN)	0	5 3 (3)	Ad-hoc Assessment	Sep 12, 2017 2:23 PM HKT	LEUNG Yiu-Kei (NETD_YK)
	-	LAW Zechariah		E (E)	Training	Jul 16, 2015	ADMINISTRATOR

To revoke the Competency:

First, check the Learner(s) that the Competency needs to be revoked: either

 Select Revoke Competency from the Bulk Action Drop-down List (Applicable to multiple learners); or

ii. Click the Cog icon and then select **Revoke Competency** from the menu (Applicable only to the checked learner next to the Cog icon).

2. A **Confirm** Window will be launched. Click **OK** to confirm. The Name List for this Competency will be updated accordingly.

#### Info

If the "**Training**" setting of **Formal Acquisition Methods** in the **RECOGNITION POLICY** Secti on on the **Details** Tab has been enabled, this Competency can later be re-awarded to the Learners automatically once they meet the Competency Requirements.

# **Competency Data Loader**

The Competency Data Loader allows the import of competencies in bulk. It also allows the creation of competency models on-the-fly. For more information, please refer to EN145 Data Import / Export.

# SFIA Library

#### (available for Performance only)

Skills Framework for the Information Age (SFIA) assists in evaluating employees skills and competencies. The skills defined in the SFIA, presented in categories and subcategories, can be imported into the LMS. The SFIA library functions can be accessed at **Manage Center** > **TALENT** > **C OMPETENCY MANAGER** > **Library**. On the Library tab, you can do the following tasks:

- Importing the SFIA Skills to LMS
- · Associating the SFIA Skills to a Competency Model
- Removing an SFIA Library
- Removing the competency to an SFIA Library.

# Importing the SFIA Library

To import the SFIA library, click "+" icon



This opens the Import Library dialog box.

- 1. Enter the assign name for the dictionary.
- 2. Click the **Choose File** button to select the file to be imported.
- 3. Click Import to start the import process.

NetDimensions Talen	t Suite Manage Center 🗳
OVERVIEW LEARNIN	G TALENT COMMUNICATE USERS REPORTS SYSTEM
Competency Mar	nager
Library Competency M	Vodels Proficiency Levels Job Profiles Assessment Management User Search
Libraries	
<	Competency Name
	There are no items to display.
	Import Library X
	Library Name* 1
	SFIA_v6
	Import File* (2)
	Choose File sfia_v5.xls
	amport Cancel

4. Click **OK** once the process is completed.

Library	Competency models	T TORICIONCY LEVELS	oob i fomes	Assessment Manager	nem	Ober Dealerr	
Librari	es 🔸	- * *					
<		Þ	Competen	cy Name			
					There	are no items to display.	
		Import Library				×	
		Library Name*					
		SFIA_v5					
		Import File*					
		Choose File sfia	_v5.xls				
		Uploading file Processing complet	te.				
		L				111	

The SFIA Skills are now downloaded to the competency manager library.



# Associating SFIA Skills to a Competency Model

This section teaches you on how to associates SFIA skills to a competency model. It means that you are going to use the skills level defined by the SFIA to a competency model.

- 1. Select the category where the SFIA skill is associated.
- 2. Tick the box of the SFIA skill that will be added to the competency model.
- 3. Click the **Bulk Action** drop down button and then select **Add to model**.



The menu for selecting competency model is displayed. Select the competency model, then click the **A dd To Model** button.

aries 🕂 🗕 🗮	Bu	Ik Action
SFIA_v5 Business change		Competency Name
Client interface		O Porting/software integration
<ul> <li>In Procurement and management suppor</li> <li>In Service management</li> </ul>	or 🔽	OSystems installation/decommissioning
Solution development and implement Human factors	ta 🖸	Add Competency to Model
Installation and integration		Select Competency Model
Strategy and architecture		General
m	۲.	Training

A message will be displayed on the screen. Click the **Go to Model** button to display the competency model, otherwise click **OK** to stay on the *Dictionary* tab.

NetDimensions Talent Suite	Manage Center
OVERVIEW LEARNING TALENT	COMMUNICATE USERS REPORTS SYSTEM
Competency Manager	
Library Competency Models Profi	iciency Levels Job Profiles Assessment Management User S
Libraries 🗧 🗧	Bulk Action
<ul> <li>EFIA_v5</li> <li>Eusiness change</li> <li>Client interface</li> </ul>	Competency Name  Porting/software integration
<ul> <li>Procurement and manageme</li> <li>Service management</li> </ul>	Result ×
<ul> <li>Esolution development and im</li> <li>Human factors</li> <li>Installation and integration</li> <li>Systems development</li> </ul>	1/1 competency is added in the competency model "General"
<ul> <li>Strategy and architecture</li> <li>III</li> </ul>	Go to Model OK

# Removing an SFIA Library

To remove an imported SFIA Library,

- 1. Go to Manager Center > Talent > Competency Manager > Library.
- 2. Select the library you want to remove.
- 3. Click the Delete Library button.

NetDimensions Talent Sui	te Manage Ce	nter	
OVERVIEW LEARNING	TALENT COMMUNIC	ATE USERS REPORTS	SYSTEM
Competency Manag	er		
Library Competency Models	Proficiency Levels	Job Profiles Assessment Ma	nagement User Search
Libraries 🗧 🕇			
The second			

4. Confirm to delete.

# Removing a Competency under the SFIA Library

This section teaches the procedures on how to delete a competency under the SFIA Library:

- 1. Select the library where the competency you want to remove is associated.
- 2. On the left side of the competency manager, tick the box of the competency you want to delete.

**Note:** To delete all competencies, tick the box located on the header of the table. Once this box is ticked, all boxes of the competencies will be ticked.

Click the Bulk Action drop-down button and then select Delete.



A confirmation message is displayed. Click **OK** to continue with the deletion of the competency, otherwise, click **Cancel**.

# Job Profiles

(available for Performance and Learning only)

Under the Job Profiles tab, it allows you to perform the following tasks:

- Maintain the Job Profile Catalog
- Maintain the Job Profile

# **Job Profile Catalog**

A huge number of job profiles can easily be managed if they are segregated according to their category. Like for an instance, you can place all job profiles related to HR into one category. Through this segregation, a user can easily track the job profile.

On the LMS application, categorization of job profiles can be done through Job Profile Catalog. You can place and segregate all related job profiles using the Job Profile Catalog. The proceeding section teaches you the procedure on how to maintain a job profile catalog and maintain a job profile record.

## **Creating a Job Profile Catalog**

Select the **Job Profiles** tab. Click the **Add** button, then a text box is displayed. Enter the name for the new catalog and then press Enter.

Competency Manager

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
	- 10	2		🛱 Groups 🗗	Auto-Assign Console	+ Create Job Prof
Catalog	ıs 🕂 –	a -	Job Profile	Name		
. D G	atalogs			There are no iter	ms to display.	
	General The Catalog of Rolf 21					

A confirmation box is displayed. The new catalog will be added on the Catalog Hierarchical Tree.

#### Manage >

Competency Manager

Library Competency Models	Proficiency Levels	Job Profiles Assessment Management User Search
	P Bulk A	Action 💌 🖀 Groups 🖉 Auto-Assign Console 📔 + Create Job Profile
Catalogs + -		Job Profile Name
Catalogs		Product Management
Tcatalog for ABC [] Catalog for ABC [] General [] The Catalog of Rob		This is the name

## **Renaming a Job Profile Catalog**

Using the catalog hierarchical tree, select the catalog you want to rename. Click the **Tool** button and then select the **Rename selected** option.

**Competency Manager** 

Manage >

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Managemen	nt User Search	
		P Bulk	Action 💌	🕞 Groups 🕻 🖬	Auto-Assign Console	+ Create Job Profile
Catalog	ıs 主 🗕		Job Profile	Name		*
. D C	atalog Rename selected	·	Product M	anagement		
	Cata Permissions General The Catalog of Rob		This is the	name		

The selected catalog model will be editable. Rename the catalog and then press Enter.

Competency Manager					
Library Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Catalons + -		Job Profile	🕞 Groups 🖉	Auto-Assign Console	+ Create Job Profile
Catalogs     Catalogs     General     The Catalog of Rob			There are no iter	ms to display.	

#### Setting Permission on a Job Profile Catalog

To set permission to a catalog, using the catalog hierarchical view, select the catalog where the permission will be set. Click the **Tool** button and then select the **Permissions** option to launch the Permissions Selector.

Levels Job Profiles As	sessment Management User Sea	rch
	🕞 Groups 🚺 🕫 Auto-Assign	Console 🛛 + Create Job Profile
Job Profile Name	2	^
	There are no items to display	1.
	Levels Job Profiles Ass	Levels Job Profiles Assessment Management User Sea

## **Removing a Job Profile Catalog**

From the Catalog Hierarchical Tree, select the catalog you want to remove. Click the **Delete Catalog** b utton.

#### Manage >

Competency Manager

Library Competency Models Proficiency Leve	Job Profiles Assessment Management User Search
	🖀 Groups 🕽 🖙 Auto-Assign Console 🕽 🕂 Create Job Profile 🕽
Catalogs 🛛 🕂 🗖 💭 📕	Job Profile Name
Catalogs Catalog for ABC General The Catalog of Rob	There are no items to display.

A confirmation message will be displayed, click **OK** to remove the selected catalog, otherwise, click the **Cancel** button to cancel the deletion of the catalog.

## Adding a Job Profile on a Job Profile Catalog

Select the job profile catalog where the job profile will be added. Click the + Create Job Profile button.

anage >						
Compe	tency Manage	r				
Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
		<b>P</b>		🕞 Groups 🕼	Auto-Assign Cons	ole 🚺 + Create Job Profile
Catalog	s 主 🗖	<b>.</b>	Job Profile	Name		
a [ Ca	italogs Catalog for ABC			There are no iter	ns to display.	
	General The Catalog of Rob					

This leads you to Job Profiles Details screen, where you can enter the following information:

Compe	tency	Manager
-------	-------	---------

Job Profile Details
Reference Code 61
New Job Profile
Name d
Job Profile Catalog
Catalog for ABC
Description
B I U ASC   Font Family - Font Size -   Ξ  Ξ   A - 202 -   HTm. 61

- A. Displays the **Breadcrumbs** which provide links back to previous page.
- B. Enter the job profile reference code.
- C. Enter the job profile name.
- D. You can change the job profile catalog using the dropdown list button.
- E. Provide the job profile description.

Active		£9		li.	
Allows Se	If-Assignment				
Allows Re	viewer Assignm	ent			
Required (	Competencies				
required e					
Course and	edd o MedallCor		k antila		
Search and	add a Model/Cor	mpetency to the jo	ob profile p		
Search and Mandatory	add a Model/Cor	mpetency to the jo	bb profile p	Required Level	h
Search and a	add a Model/Cor	npetency to the jo	bb profile p Library Source There are no items to disp	Required Level	h
Search and a Mandatory To complete t All listed c	add a Model/Cor Model his job profile, ci ompetencies	wpetency to the jo Name	bb profile performed and the profile profile performance and the p	Réquired Level	h

F. Tick the corresponding check box if you want the job profile to be:

- Active
- Self-Assigned
- Review-assignment

**G**. Search and add a Model and a competency. To search, click the Search button to display the list of available competencies.

H. Display the list of selected model and competency.

Mandatory	Model	Name	Library Source	Required Level
: 🗹	B: Providing direction	B12 Promote equality of opportunity, diversity and inclusion in your organisation		2-2 💌 💼

**I.** Tick the box of the selected competency model to indicate that the corresponding competency is mandatory.

To save the job profile details, click the **Save** button, otherwise click the **Cancel** button to disregard the information you have entered.

## **Editing the Job Profile Details**

To modify the details of the job profiles, select the catalog where the job profile is associated. The list of available job profile will be displayed. Click the **Gears** icon of the job profile you want to modify and then select **Edit Job Profile** or click the job profile name.

**Competency Manager** 

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
		Bull	k Action 💌	🕞 Groups 🛛 🗗	Auto-Assign Console	+ Create Job Profile
Catalog	s 🕞 🗗	· · []	Job Profile	Name		
a 🚺 Ca	atalogs		Job Profile	2		
	Catalog for ABC General		Quality Ma	nagement		
	The Catalog of Rob		Edit Job Profile			

This opens the job profile details. Start editing the job profile details. To keep the changes, click the **Sav e** button. To remove the job profile, click the **Delete** button. To cancel the changes and to return from previous screen, click the **Cancel** 

#### Manage >

Competency Manager

Job Pro	file Details			
Deferenc	e Code			
Quality N	http://curreanagement			
Name				
Quality N	fanagement			
Job Profil	e Catalog			
General				
Descriptio	on			
B Z	U ARC Font Family +	Font Size -   [Ξ ]Ξ   <u>A</u>	• 💆 •   ann.	
Quality I	danagement			
			1.	
Active				
Allows	Self-Assignment			
Allows	Reviewer Assignment			
Require	d Competencies			
Require	d Competencies			
Require Search a	d Competencies	to the job profile		
Require Search a	nd add a Model/Competency	to the job profile		
Search a	nd add a Model/Competency	to the job profile P	Library F	Required
Require Search a Mandator	nd add a Model/Competency Nodel	to the job profile P	Library F Source L	Required
Require Search a Mandator	nd add a Model/Competency N Model A: Managing self and	to the job profile P Name A3 Develop your personal networks	Libyary F Source L	Required avel
Require Search a Mandato	ed Competencies nd add a Model/Competency ry Model A: Managing self and personal skills	to the job profile P Name A3 Develop your personal networks	Library F Source L	Required evel 4 • 4
- Require Search a Mandator	ry Model A: Managing self and personal skills	to the job profile P Name A3 Develop your personal networks	Library F Source L	Acquired evel 4 - •
- Require Search a Mandator	ry Model A: Managing self and personal skills D: Working with people	to the job profile P Name A3 Develop your personal networks D17 Build and sustain collaborative relationships with other organisations	Library F Source L	tequired evel 4 - ▼ 4 - ▼ 8 ele ▼
- Require Search a Mandator	ry Model A: Managing self and personal skills D: Working with people	to the job profile Name A3 Develop your personal networks D17 Build and sustain collaborative relationships with other organisations	Library F Source L	tequired eval 4 - 4 - ele ele ct
- Require Search a Mandator 3 🗹	ry Model A: Managing self and personal skills D: Working with people te this job profile, complete	to the job profile P Name A3 Develop your personal networks D17 Build and sustain collaborative relationships with other organisations	Library F Source L	Acquired evol 4 - 4 - ele ele ct
- Require Search a Mandator 3 2 To comple © All liste	rd Competencies	to the job profile P Name A3 Develop your personal networks D17 Build and sustain collaborative relationships with other organisations	Library F Source L	A- eval 4- 4 4 *S sile ct
- Require Search a Mandator 3 2 To comple © All liste	ed Competencies Ind add a Model/Competency  Y Model  A: Managing self and personal skills  D: Working with people te this job profile, complete id competencies	to the job profile P Name A3 Develop your personal networks D17 Build and sustain collaborative relationships with other organisations	Library F Source L	A- eval 4- 4 4 *S sile ct

## **Cloning a Job Profile**

This section teaches you the procedure on how to clone a job profile. Select the catalog where the job profile is associated. The list of available job profile will be displayed.

Tick the job profile you want to clone. Click the **Bulk Action** drop down button and then select **Clone**.

Competency Manager

Library Competency Models	Proficiency Levels	Job Profiles	Assessment Man	agement	User Search		
	Bulk /	Action	🗃 Grou	ps 🗗 🗗	Auto-Assign Console	+	Create Job Profile
Catalogs + -	Delete	ofile N	ame				^
Catalog for ABC General The Catalog of Rob		Guality Man	agement				

Note: You can also clone a job profile by clicking the **Clone** button on the Job Profile details.

	personal skills		4
	D: Working with people	D17 Build and sustain collaborative relationships with other organisations	 ele ct
To complete the All listed c	his job profile, complete ompetencies		
© 2 🔍 of ti	he listed competencies	(including mandatory)	

## **De-assigning Learner to a Job Profile**

- 1. From the job profiles editor, click the **Usage** button.
- 2. Tick the box of the learner you want to de-assign to the job profile.
- 3. Click the **De-Assign Job Profile**.

#### **Competency Manager**

Jsage 19	Usac	ie			
	Filter:		Submit	Show: 10	
	Showin	ıg: 1 - 5 of 5			
		Last Name	▲ First Name	User ID	
		Baker	Jamie	zcorp_jamie	
		Bishop	Alan	zcorp_alan	
		Student	New	empno001	
		Student2	New2	empno002	
		Student3	New3	empno003	
		7 <u>-</u> 7			
	De-As	sign Job Profile			

## Assigning a Learner or Group of Learners to a Job Profile

This section shows how to assign a learner or group of learners to a job profile. To do this, select first the job profile where the learner will be assigned.

From the job profiles editor, click the **Group-assign** button. Click the **Select User(s)** link to select the the group of users.

# **Competency Manager**

Library	Compet	ency Models	Proficiency Levels	Job Profiles	Assessment	Management	User Search
Details		General > CN	IC Lathe Operator				
Usage		Group-as:	sign				
Group-as	sign			0			
Auto-ass	ign	Search for	a user	U sei	ected		
		🖬 Save	🔸 Cancel				

## Note:

• The user can enter search keyword into the quick search box, and the system will return matching results as the user types.

Owner	
st	••••
ADMINISTRATOR System	
STUDENT Jane	5 😢
STUDENT Jack	
STUDENT John	
STUDENT Joe	
STUDENT Tom	
STUDENT Louis	
STUDENT Vivian	
STUDENT Lily	
STUDENT Angel	
+ Add	
Evit Data	10/6-

• The user can choose from one of the results before the keyword is complete. Then, the selection will be shown as a token within the user selector box.



• The user can remove any user selection with the cross on the right-hand side.



🕅 Automatically undata tracking from subordinata ogale 🙆

• To open the advanced search interface, the user can click the "..." box beside the quick search box. This opens the menu for selecting the learners.

User Selector			
Jser ID	First Name	Last Name	
Role	Organization	User Group	
All			
Specify Additional At	tributes		
Search Reset			
Results: 16			Vertical Vie
ADMINISTRATOR Syst HUI Danny LEARNER Mary UM Garbo STUDENT Angel	lem		
STUDENT George			
Selected: 1			
STUDENT Jack			
OK Cancel			

- The user can switch between horizontal arrangement and vertical arrangement for the search result box and the selection box. The switch link is located at the top-right-hand corner of the two boxes.
- The selection from the quick search box will appear in the advanced search selected box, and the selection from the advanced search interface will also show in the quick search box as user tokens after clicking OK.
- Also, when there are more than 10 users selected, there will only be 10 user tokens shown within the user selector box, and there will also be a "show all" button. Note that the number of selected users above the right-hand side of the quick search box always shows the total number of selected users, no matter how many user tokens are being shown within the user selector box. Clicking the "show all" button will display all the user selection within the user selector box. If there are 50 or more selected users, clicking the "show all" button will just show the advanced search pop-up instead of showing all the user tokens within the user selector box.

General > Accountant		
Group-assign		
Group Assign to users:	17 selected	
ADMINISTRATOR System × HUI Danny ×		••••
LEARNER Mary × LIM Garbo × STUDE	NT Angel ×	
STUDENT George × STUDENT Jack ×		
STUDENT Jane × STUDENT Joe ×		
STUDENT John × Show all		
Search for a user		

- When all user tokens are shown, the user can click the hide button to hide the other user tokens and show only the first 10 user tokens.
- The User Selector can now displayed more users which matching search keywords.



Click the **Save** button to keep the changes.

# Auto-Assigning Group Users to the Job Profile

Allows the automatic assignment of job profiles based on targeting criteria. To do this, on the job profile details, click the **Auto-assign**.

1. Tick this box if you want to automatically assign the job profile to all users.

2. Specify the criteria to enable the automatic assignment to the job profile. Criteria can be filtered into the following:

- Organization
- User Group
- Attributes

You can also assign the job profile base on the following categories.

- Job Title
- Language
- Join date start
- Join date end

NetDimension	s Talent Suite Manage Center	A MOLIN
OVERVIEW LI	ARNING TALENT COMMUNICATE USERS REPORTS SYSTEM	
Competency	Manager	
ana		
Library Compe	tency Models Proficiency Levels Job Profiles Assessment Management U	Jser Search
Details	General > CNC Lathe Operator	
Usage	Auto-assign	
Group-assign	Specify criteria to enable automatic assignment of this job profile to a specific group	p of users.
Auto-assign	Auto-Enroll Targeting Activation: Inactive	
	Assign this to all users?	
	Edit Organization Targets	
	Edit User Group Targets	
		2
	Edit Attribute 1 Targete	
	Lan Aumate Franges	
	Edit Attribute 2 Targets	

Click the Set-Auto Assign Targets button once all the information has been provided.

Job Title		
Language	All	
Join Date Start	(not specified) 📑 🧷	
Join Date End	(not specified) 📑 🧽	
🔄 Join Date is at least 📊	- day(s) - ago	

# Status Filter at Manage Job Profiles

On the Job Profile administration screen, it would be helpful to show a status indicator for each job

profile. A sortable "Status" column has been added to the listing screen on the right. On the left, there are checkbox options to filter on active or inactive job profiles under a selected catalog, count information is provided for each status.

#### **Competency Manager**

Library Competency Models	Proficiency Levels	Job Profil	es Assessment Management	User Search	
	٩	Bulk Action	n ~	🕫 Auto-Assign Console 🔶 Create	e Job Profile
Catalogs			Job Profile Name	Status	
Catalogs     General		•	Chief Technology Officer	Active	
Refine By		•	Direct of Global Product Managemen	nt Active	
All Status		•	Head of Release Development	Inactive	8
Inactive (2)		•	Product Manager	Active	
		•	Software Engineer	Active	
		•	Team Lead	Inactive	ŧ.

#### **Job Profile Management**

#### Job Profiles Redesign

When you are handling tens or hundreds of job profiles on a specific catalog, you might need to scroll quite a bit to find your targeted job profile. With the help of the paginator, you don't need to scroll endlessly.

#### 1. Pagination features

With the help of the paginator, you could sort the "job profile name" and "status" as well.

Competency Models	Proficiency Levels	Job Profiles	User Search	
Job Profile Name			_	
		Se	arch	
Catalogs		Search R	esults For Sales	Results per Page: 10 💌
Catalogs     Finance     General		Showing: 1	- 10 of 12	< 1 2 > »
Legal related	gement	Bulk Acti	on 💌 🖨 Print 🍙 Groups 🕼 Auto-Assign Consol	e 🖌 + Create Job Profile
Refine By			Job Profile Name	► Status 🗘
All Status		• •	Floor Manager (electronic gadgets)	Active
Inactive (0)	•	Floor Manager (general)	Active	
		•	Promoter (electronic gadgets)	Active
		•	Promoter (general)	Active
		•	Promoter (household)	Active
		• 💠	Promoter advanced (electronic gadgets)	Active
		• •	Sales (general)	Active
		• •	Sales (household)	Active
		•	Sales (kids' wear)	Active
		• •	Sales advance (general)	Active

#### Competency Manager

#### 2. Print feature

A print feature is added on the "User Review" page. So now you could print out the user results assigned with that job profile on the screen when necessary.

Details	Sales > Floor Manager (general)		
User Review	USER REVIEW		
Group Assign		HIDE FILTERS	
Auto-assign	Organization Job Title	First Name	
	Click to select All Job Titles	•	
	Last Name		
	Job Profile Status Competency Profile	as of	
	All • Nov 5, 2015	0	
	Showing: 1 - 1 of 1		Results per Page: 10 💌
	Bulk Action		🖨 Print
	Name	Job Profiles	
	KID Jeremy ALL/Managers/Floor Managers	🛩 Floor Manager (general)	
	Job Profiles (1) <b>✓ Floor Manager (general)</b>		
	Showing: 1 - 1 of 1		

Once you press the Print button, you would see a print preview along with the browser print options dialog.

A NotDimonsio	or Talant Suita	anago Cor	ntar			Datas I.a.
OVERVIEW	LEARNING TALENT	COM	MUNICATE USERS	REPORTS	SYSTEM	oystem Log
Competency	y Manager					
Competency Mod	tels Proficiency Levels	Job Profiles	User Search			
Details	Sales : Floor Manager (gene	ral)				
User Review	USER REVIEW					
Group			HIDE FILTE	RS		
Auto assign	Organization		Job Title	First Na	ime	
Auto-assign	Click to select		All Job Titles	•		
	Last Name					
	Job Profile Status		Competency Prolle as of			
	All	•	Nov5, 2015	0		
	E Show learners with	closed a				
	Filter					
					Results per Page	10 💌
						1
	Showing: 1 - 1 of 1					
	Job Profiles					
		GD Jeremy	s/Floor Managers			
	V Floor Manager (gene	nal)				

## • Catalog Filtering in Job Profile Selector

When your organization grows, there might be hundreds or thousands of job profiles for you to pick. Even worse, you might come up with similar job profile names after a search, so it would be more convenient if we could add a "Catalog" filter in the selector to narrow down results.

#### 1. Performing "auto enroll" in the learning module page

Sales Strategies In The Big Data World (MOD-0071)         Online Session         Session Setup - the following steps help you to define a session.         1       Edit session         2       Enter cost information         3. Participants         4. Instructors         5       E-mail Preferences Setup         6. Cost Accounting Information         7. View usage statistics         8. Checklist         9. Define Session Security         10. Associated Programs         Session Utilities - before you use these utilities, rease save any change, you have made.         * 11. Auto-Enroll         12. Group Enroll         13. Group Training Plan         14. Knowledge Center Preview	Module Properties Session Properties	And with Logical Domain
Online Session         Session Setup - the following steps help you to         define a session         1. Edit session         2. Enter cost information         3. Participants         4. Instructors         5. E-mail Preferences Setup         6. Cost Accounting Information         7. View usage statistics         8. Checklist         9. Define Session Security         10. Associated Programs         Session Utilities - before you use these utilities, plase save any changes you have made.         11. Auto-Enroll         12. Group Training Plan         14. Knowledge Center Preview	Sales Strategies In The Big Data World (MOD-0071)	
Session Setup - the following steps help you to define a session.       Or with         1       Edit session         2       Enter cost information         3. Participants       Instructors         5       E-mail Preferences Setup         6       Cost Accounting Information         7. View usage statistics       • Employment Information         9. Define Session Security       • Job Profiles & Competencies         9. Define Session Security       • Job Profiles & Competencies         9. Session Utilities - before you use these utilities, please save any changes you have made.       • Job Profile         9. Session Utilities - before you use these utilities, please save any changes you have made.       • Job Profile         9. Session Utilities - before you use these utilities, please save any changes you have made.       • Job Profile         9. Session Utilities - before you use these utilities, please save any changes you have made.       • Job Profile         13. Group Training Plan       Competencies         14. Knowledge Center Preview       Lears should meet Any I of the following Competency criteria;	Online Session	
Session Setup - the following steps help you to define a session. 1 Edit session 2 Enter cost information 3 Participants 4 Instructors 5 E-mail Preferences Setup 6 Cost Accounting Information 7. View usage statistics 8 Checklist 9 Define Session Security 10 Associated Programs Session Utilities - before you use these utilities, please save any changes you have made. 11 Auto-Enroll 12 Group Enroll 13 Group Training Plan 14. Knowledge Center Preview Users should meet Ary  competencies		Or with
<ol> <li>Enter cost information</li> <li>Participants</li> <li>Instructors</li> <li>E-mail Preferences Setup</li> <li>Cost Accounting Information</li> <li>View usage statistics</li> <li>Checklist</li> <li>Define Session Security</li> <li>Associated Programs</li> </ol> Session Utilities - before you use these utilities, please save any changes you have made. 11. Auto-Enroll 12. Group Enroli 13. Group Training Plan 14. Knowledge Center Preview Isser should meet Apr. ▼ of the following Competency criteria:	Session Setup - the following steps help you to define a session.	Organization
<ul> <li>6. Cost Accounting Information</li> <li>7. View usage statistics</li> <li>8. Checklist</li> <li>9. Define Session Security</li> <li>10. Associated Programs</li> <li>9. Job Profiles &amp; Competencies</li> <li>9. Job Profile</li> <li>9. Job</li></ul>	Edit session     Enter cost information     Participants     Instructors     E-mail Preferences Setup	
<ul> <li>Schecklist</li> <li>Define Session Security</li> <li>Associated Programs</li> <li>Job Profiles &amp; Competencies</li> <li>Job Profile</li> <li>Job Profile</li> <li>Job Profile</li> <li>Competencies</li> <li>Laser should meet Any T of the following Competency criteria:</li> </ul>	6. Cost Accounting Information 7. View usage statistics	
9. Define Session Security         10. Associated Programs         Session Utilities - before you use these utilities,         10. Associated Programs         Job Profiles & Competencies         Job Profile         Job Profile         Job Profile         Job Profile         Competencies         Job Profile         Lisers should meet Any ▼ of the following Competency criteria:	8. Checklist	Employment Information
Session Utilities - before you use these utilities, please save any changes you have made.	9. Define Session Security 10. Associated Programs	✓ Job Profiles & Competencies
Session Utilities - before you use these utilities, nease save any changes you have made. 11. Auto-Enroll 12. Group Erroll 13. Group Training Plan 14. Knowledge Center Preview Users should meet Any T of the following Competency criteria:		Job Profile
13. Group Training Plan       14. Knowledge Center Preview       Users should meet Any I of the following Competency criteria:	Session Utilities - before you use these utilities, please save any changes you have made. 11. Auto-Enroll 12. Group Enroll	
Users should meet Any   of the following Competency criteria:	13. Group Training Plan 14. Knowledge Center Preview	Competencies
could should need thing of the following comparency chiefly.		Users should meet Any • of the following Competency criteria:
		P

Once you click on the "Job Profile" link, a selector would pop up. When selecting a job profile, you can filter by job profile name/code and/or catalog:

ob Profile Name/Code	Catalog		
risk	Finance		
Search Reset			
vailable Choices			
sk management officer			

# **Organization and Job Profile Enrollment Restriction**

You can restrict the number of participants that can be enrolled onto a session for a given organization and job role (as needed) during a pre-defined period. The participant's organization and job profiles will be checked against the configured limits when enrolling to the course.

On session level, there are three options for handling enrollment restrictions:

- 1. Unrestricted Override module level enrollment restriction rule (if any). Skip restriction check and apply normal enrollment flow.
- 2. Use Session restriction Override module level enrollment restriction (if any). Apply session level enrollment check.
- 3. Use Module Restriction Apply module level enrollment check (default option)

The session level rule is checked first. If there is no enrollment restriction on session (or restriction period expired), module level enrollment restriction is applied. If there is no enrollment restriction, passed restriction check, restriction period expired or unrestricted enrollment is set on session level, normal enrollment flow is applied. The following shows the restriction check flow.



## **Enrollment Restriction**

An enrollment restriction page is available in the catalog editor:

Catalog Editor	0 0 B 0 0 X
Session Properties Module Properties	Enrollment Restriction
"tester" test äöüß (EKP000000740)	"tester" test äöüß (EKP000000740)
	Restriction Process Use Module Restriction *
1.1 Define Module Properties	Restriction Period
1.3 Enter objectives 1.4 Enter references	To configure a restriction period, specify the start date and end date below. If the day of enrollment is within the specified restricted period, enrollment restriction will be checked. Otherwise, it will proceed with normal enrollment.
1.5 Preview 1.6 View usage statistics 1.7 Indicated Interest List	Start Date; Jul 24, 2018
1.8 Associated Programs 1.9 Virtual Archive 1.10 eSignatures	End Date:   Jul 27, 2018
1.11 Checklist 1.12 Recommended Class Resources	Rule(s)
2 Access control/enrollment control 2.1 Define Module Security 2.2 Assign prerequisities 2.3 Assign Recommended Course(s)	Enrollment restriction limit the number of participants who can enroll to the course based on the configured organization and job profile, if any. It is also possible to have more than one restriction rule. To add an enrollment restriction rule, select the organization and the number of participants allowed to enroll within the restricted period. Additionally, job profile may also be configured as needed.
2.4 Assign exam/certification/evaluation 2.5 Define Enrollment Policy 2.6 Enrollment Restriction 2.7 E-mail Preferences Setup	_LV-6 Select organization(s) Remove
3 Knowledge Center Setup	
3.1 Setup Options	Limit per Organization(s)
4 Launch setup 4.1 Define Launch Properties 4.2 Preview 4.3 Proxied Launch Package	10.0 Jemo (programmer) A Select Job Profile(s) Remove Job Profile(s)
	Add Enrolment Restriction

A similar page is also available at the Session level. The following describes all the input fields for "Enrollment Restriction":

Field Name	Description	Mandatory
Restriction Process	<ul> <li>Indicates the restriction should apply to which level</li> <li>Unrestricted : No restriction for the selected module/session.</li> <li>Use Session Restriction (Session Properties Only): Apply the defined restriction to the selected session.</li> <li>Use Module Restriction: Apply the module restriction to the selected session.</li> </ul>	Yes
Start Date End Date	The validity of the restriction	Yes
Select organization(s)	The organizations which are restricted (supports multiple input)	Yes
Limit per organization(s)	The enrollment limit of any each of the organization	Yes
Select Job Profile(s)	The job profiles which are restricted (supports multiple input)	No
Add Enrollment Restriction	Add new restriction rule	N/A

When Module restriction process or Session restriction process (for session level) is selected, removing the last enrollment restriction rule triggers the restriction process to switch back to 'Unrestricted' and all other components are disabled.

# **Enrollment Restriction Checking**

NetDimensions LMS executes the restriction checking when user attempts to enroll the learning object and prompt for error message when the restriction is violated. If enrollment restriction is violated, seats are displayed as restricted with red icon.

Married Married

	Enrollment Restriction	
	0 Reviews Session	
Learning Type:	Classroom	
Subject:	Unassigned	
Language Enrolled:	Multi-Language	
Objectives:		
More Information:		
Support Contact:		
Session(s):	Enrollment Restriction	Seats: Restricted
	8/21/15 9:00 AM - 8/21/15 5:00 PM CST O Show more info	Enrollment: 8/20/15 9:00 AM - 8/20/15 8:00 PM CST
	This session has an enrollment restriction. Ple questions	ase contact your System Administrator if you have any

The checking also applies to the enrollment wizard for batch enrollment.

> NetDimensions			ACHINISTRATOR	Spann Haray Cone Haip All	CarnetOn Legen
Huma, Lawring Dintel, Panue	nil Calendari - Carner Carner - Workco	Connect Reports Teach		())) ())	
Enrollment Wizard					
The encodence where all where you	p mint a finite first (or a family of facto	parts) for detect exercises of an excitence action.	The provinced action w	E apply to the selected random o	in generation
models() at the surgery level fails safetbell	a, however, that some eventment actions	ney legent additional republic Theore odditional repu	(Tolts vit a donation)	be impleyed with surport is the	(processing action
SETTINGS					
Achim					
- Sweet at action					
Select ermodele					
Petcoantra	+ -				
	- 9				
Harton'					-
Track	Los 21, 2010 VI 8023 AM CST	ANALYZATIC Some MATRIM	1 of Dis.	City I was Report	-
Event	July 23-2015 40 25 ET AM CST	ADMINISTRATOR Summy ADADMINI	Light	CRV Entr Report	1000
David	July 23, 2015 10 43 45 AM CST	ACKENISTRATOR Series (NDADWINE	Laplan	CIVERS Report	67773
	La la marchana alla alla da	Artistevic Top Trill Summer (Artis Darks	Log Day	CRATten Depart	1000
Charge Ecolorient Bally	walls fill, where the hard part hard t	Particulation of the construction of the second second			

# **Enrollment Restriction Matrix**

The following table shows different combinations of the enrollment restriction rules with their description

Restriction	Description	Sample valid combinations
Organization=Org1 Limit per Organizations=1	<ul> <li>Maximum one enrollment for the entire Org1 organization structure (includes all its children structure)</li> <li>Other organizations cannot enroll during the enrollment restricted period</li> </ul>	

Organization=Org1 , Org2Limit per Organizations=2 OR Organiz ation=Org1 Limit per Organizations=2 Organization=Org2 Limit per Organizations=2	<ul> <li>Maximum two enrollments for each of the entire Org1 and Org2 organization structure (includes all its children structures)</li> <li>Other organizations cannot enroll during the enrollment restricted period</li> </ul>	
Organization=Org1 , Org2Limit per Organizations=2 <b>Job Profile</b> =Engineer, System Analyst	<ul> <li>Maximum two enrollments for any engineers or system analysts for each of the entire Org1 and Org2 organization structure (includes all its children structures)</li> <li>Other job profiles and organization cannot enroll during the enrollment restricted period</li> </ul>	<ul> <li>2 engineers (Org1) and 2 system analysts (Org2)OR</li> <li>1 engineer (Org1) and 1 system analyst (Org1) and 2 engineers (Org2)</li> </ul>
Organization=ROOT, Org1 Limit per Organizations=2 OR Organization=ROOTLimit per Organizations=2 Organization=Org1 Limit per Organizations=2	• Maximum two enrollments for the entire ROOT organization structure (includes all its children structures), the Org1 value has no effect here as it is under the ROOT organization	
Organization=ROOTLimit per Organizations=1 Organization=Org1Limit per Organizations=2	• Maximum one enrollment for the entire ROOT organization structure (includes all its children structures), the Org1 value has no effect here as it is under the ROOT organization	

# **Job Profile Assignment Notifications**

Six options are listed as global settings in System Configuration:

- Job Profile Assignment Notification for Assignee: Notification will be sent to the user.
- Job Profile Assignment Notification for Direct Appraisers: Notification will be sent to the direct Manager of the user with separate custom messages
- Job Profile Assignment Notification for Job Profile Owner: Notification will be sent when Job Profile will be assigned to the Job Profile Owner
- Job Profile De-Assignment Notification for Assignee: Notification will be sent to the user when the job profile gets de-assigned
- Job Profile De-Assignment Notification for Direct Appraiser: Notification will be sent to the direct Manager when the job profile gets de-assigned
- Job Profile De-Assignment Notification for Job Profile Owner: Notification will be sent to the Job Profile Owner when the job profile gets de-assigned

.

Job Profile Assignment Notification for Assignee E-mail:	System Assign Assignee	 Û	11.2	0
Job Profile Assignment Notification for Direct Appraisers E-mail	System Assign DA	 Đ	11.2	0
Job Profile Assignment Notification for Job Profile Owner E-mail:	System Assign Owner	 Û	12.1	0
Job Profile De-Assignment Notification for Assignee E-mail:	System Deassign Assignee		12.1	0
Job Profile De-Assignment Notification for Direct Appraisers E-mail:	System Deassign DA		12.1	0
Job Profile De-Assignment Notification for Job Profile Owner E-mail:			12.1	0

#### Job Profile Notification Options in System Configuration under Competency Manager

Notifications are sent out when the Job Profile is assigned via:

- Group Assignment
- Auto Assignment
- Admin or Reviewer Assignment
- Self Assignment

When editing a Job Profile, the "*Notification Settings*" allows further configuration of the email to be sent out. For each action, we can configure whether:

- A system default email template should be sent
- A customized email template should be sent
- No email should be sent

When a new Job Profile is created, the default option is to send the default email template. By selecting the second option, an email selector is enabled, bringing up the Email Template Editor and thus customized templates can be selected.

Job Profile Assignment Notification for Assignee E-mail	
Send in system default template : Lou test	
Send in custom template :	*** 🗇
Do not send	
Job Profile Assignment Notification for Direct Appraisers E-mail	
Send in system default template : Not Specified	
Send in custom template :	🖻
O Do not send	
Job Profile Assignment Notification for Job Profile Owner E-mail	
Send in system default template : Not Specified	
Send in custom template :	🗎
O Do not send	
Job Profile De-Assignment Notification for Assignee E-mail	
Send in system default template : Not Specified	
O Send in custom template :	🗎
O Do not send	
Job Profile De-Assignment Notification for Direct Appraisers E-mail	
Send in system default template : Not Specified	
Send in custom template :	@
O Do not send	
Job Profile De-Assignment Notification for Job Profile Owner E-mail	
Send in system default template : Not Specified	
Send in custom template :	
O Do not send	

Notification Settings on Job Profile detail page

## Job Profile CSV Loader

The Job Profile CSV Loader allows administrators to add, update and delete Job Profiles as well as a

*ssign or de-assign Competencies* to existing Job Profiles, using a single CSV file. For more information, please refer to EN145 Data Import / Export.

# Job Profile Owner

In some organizations, a person is assigned to be responsible for a job profile, the owner of the job profile would like to receive any notifications related to the job profile. Therefore, a Job Profile Owner field has been added to specify a person with this role. This field is available to be defined at the following locations

- Job Profile Details Page
- Job Profile List Page
- Email Placeholder Parameter

## Job Profile Details Page

A standard inline user selector field is added to the details page of the job profile to select the Job Profile Owner.

- Label: Owner
- Optional
- Only one user can be selected

## **Job Profiles List Page**

Job Profile Owner is displayed on the Job Profiles list table. If no owner is selected, "Not specified" is displayed.

Sear	ch Re	esults For General			Results per Page: 10	
Showi	ng: 1 -	2 of 2				
Bull	Actio	n 🔻		🖨 Pri	nt 🛛 🕫 Auto-Assign Console 🛛 + Create Job Profile	J
		Job Profile Name	∧ Status		•	
	Φ.	Java Developer	Active	Not Specified		
	Φ.	Software Engineer	Inactive	System Administrator (NDADMIN-1)		
					-	

Showing: 1 - 2 of 2

# E-mail placeholder parameter

Job Profile Owner First Name and Job Profile Owner Last Name are made available as E-mail placeholder parameters in a job profile context notification.

Parameters	Job Profile Owner First Name	•	Append To Message
Attachment	Job Profile Owner First Name Job Profile Owner Last Name	*	
Select an at	Join Date		
Assign attac	Launch appraisal link		
Remove ass	Linked Goal Program Name Linked Organizational Goal Title Location Code		

# Mapping Competencies to Job Profiles

Mapping the competency to a job profile can be done in two ways:

- Map the Competency to a Job Profile using the Competency Models Tab
- Map the newly created Job Profile to a Competency Model using the Job Profiles tab.

To access the Competency Model Page, Go to Manage Center > TALENT > COMPETENCY MANAGER > Competency Model.

# **Mapping Function at Competency Models**

On the Competency Models tab, select the competency model.

NetDimensions Talent Suit	te Manage Center			•
OVERVIEW LEARNING	TALENT COMMUNICATE	USERS REPORTS	SYSTEM	
Competency Manag	er Proficiency Levels Job Pro	ofiles Assessment Mana	gement User Search	
Competency Models +		Competency Name	🕞 Groups	÷
✓ I Models I General I Training			There are no items to display.	

From the list, select the competency you want to map.

There are two ways to map the competency to a job profile. First, tick the box of the competency you want to map, then click the **Bulk Action** drop-down button and select **Map to Job Profile**:

NetDimensions Talent	Suite Manag	e Center						🛓 MOLINA Alon	Logout
OVERVIEW LEARNING	TALENT COM	NUNICATE	USERS	REPORTS	SYSTEM	M			
Competency Man	ager								
Library Competency Mc	dels Proficiency Le	rels Job P	rofiles A	ssessment Man	agement	User Search			
		Bulk Act	ion 💽	-			🕞 Groups	+ Create Compe	tency
Competency Models		Bulk Acti Delete	ion	Name					^
Models		Clone Map to J	ob Profile	Cange					
General Training		•	Lathe Ope	rations					
4		•	Systems in	nstallation/decor	nmissionir	ng			
	0	•	Systems in	ntegration					

The second way of mapping the competency to a job profile: Click the **Tools** icon of the competency

ł

ł

you want to modify and then select the Map to Job Profile.

NetDimensions Talent Suite	Manage Center	▲ MOLINA Alon Logout
OVERVIEW LEARNING T/	ALENT COMMUNICATE USERS REPORTS SYSTEM	
Competency Manager	r	
Library Competency Models	Proficiency Levels Job Profiles Assessment Management	User Search
	Bulk Action	🕞 Groups 🛛 + Create Competency
Competency Models	Competency Name	*
Models	E 💐 Facilitating Change	
General Training	Edit Sompetency	
1	Map to Job Profile ecommissioning	
	Systems integration	

The menu for selecting job profile will be displayed.

Click the **Search** button to display the list of job profile. Select the job profile and then click the **Next** but ton.

👂 Search		
Job Profile Name	▲ Catalog	0
CNC Lathe Operator	General	
Fire Safety Officer	SH	

The menu for selecting the required proficiency level is displayed. Select the required proficiency level. Click the **Map to Job Profile** button.

Map to Job Profile		×
General > Quality Management		
Name	Required Level	
A3 Develop your personal networks	4 - 4	

A confirmation message will be displayed. Click the **Go to Job Profile** if you want to proceed to Job Profile details, otherwise, click **OK**.

# Assigning Competencies when Editing Job Profile

While editing a job profile, you can assign competencies under the Required Competencies section. Cli ck the search button to display the list of competencies.



The menu for selecting competencies is displayed. Select the competency:

1	Q		
Model: A: Managing self and personal skills		Required Level	
Model: B: Providing direction	to display		
Model: C: Facilitating change	to anopia).		
Model: D: Working with people			
Model: E: Using resources			
Model: F: Achieving results			
Model: General			
Model: National Occupational Standards			
Group: dd			
Competency: A1 - Manage your own resources			
<< < 1 > >> Displaying 1-10 of 17 results			

The competency model will be listed on the table. Click the **Save** button to keep the changes.

andatory	Model	Name	Library Source	Required Level	
	C: Facilitating change	C1 Encourage innovation in your team		select	
7	C: Facilitating change	C2 Encourage innovation in your area of responsibility	2221	1 - 1 2 - 2	_
	C: Facilitating change	C3 Encourage innovation in your organisation	<del>100</del> 8	4 - 4 5 - 5	
2	C: Facilitating change	C4 Lead change		select	
	C: Facilitating change	C5 Plan change		select	
<b>V</b>	C: Facilitating change	C6 Implement change	2221	select	
	C: Facilitating change	Systems integration	SFIA_v5	select	
complete t	his job profile, comple	ete			

A. This column allows you to change the sequence order of the competency model. To do this:

- Move and point your mouse the competency model you want to move.
- Press, and hold down, the button on the mouse to "grab" the object.
- "Drag" the object to the desired location,
- "Drop" the object by releasing the button.

Tick the box of the selected competency model to indicate that the corresponding competency is mandatory.

**B.** Displays the competency model.

**C.** Displays the name of the competency. The name of the competency display on this column is clickable. Once clicked, it will open the *Competency Details* screen.

**D.** Displays the library source.

**E.** Allows you to specify the required level of the corresponding competency model. To select, click the drop-down button to display the list of available levels.

**F.** This button allows you to remove the competency model from the list. To delete, click the **Remove** b utton.

# Auto-Assign Console

(available for Performance and Learning only)

# **Auto-assigning Console**

This section teaches you on how to configure properties for auto assigning job profiles. At login, a check is typically made against job profile auto-assignment criteria to see if they match the user properties. A check is usually made whenever the user or profile setting change, but you can force a

specific interval check with the settings.

From the **Job Profiles** tab, click the **Auto-Assign Console** button.

Manage >						
Competend	ey Managei	r				
Library Com	petency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
				🕞 Groups 🕼	Auto-Assign Console	+ Create Job Profile
Catalogs			Job Profile	Name		*
Catalogs	og for ABC al atalog of Rob			There are no iter	ns to display.	

The *Profile Auto-Assign Console* is displayed on the new window. Click the **Profile Auto-Assign Console** tab. Enter the following parameters:

#### **Profile Auto-Assign Console**

Profile Auto-Assign Console Auto-Assign User List	
Criteria Scan Interval 🚺	
At login, a check is typically made against job profile a made whenever the user or profile setting change, but y	uto-assignment criteria to see if they match the user properties. A check is usually you can force a specific interval check with the settings below.
Note that checking is only performed when a user logs	into the system.
Criteria Scan Interval:	Initiate New Check Only When Criteria or User Attributes Change 💌
nterval (sec) for processing assignments at login.	30
NOTE: You can always cause a specific user to "scan new scan check for a specific job profile by setting the entities.	" again by modifying their properties in the User Editor. Likewise, you can cause a auto-assign targets again. Both of these actions reset timestamps for individual
Offline Bulk Auto-Assign	
Fo force assignments even when users are not logged i DISABLED by default, as it can have a big impact on th	in, offline assignment processing must be configured. This option is typically he system.
Offline Bulk Auto-Assign:	Disabled
Execute	

#### 1.Criteria Scan Interval

This option allows you to set the criteria scan interval. Currently, here the list of available interval:

- Initial New Check Only when Criteria or User Attributes Change
- Initiate New Check at Every Login
- Initiate New Check Each Week
- Initiate New Check Each Month

2.Interval (sec) for processing assignments at login

Allows you to specify the interval (sec) for processing assignments at login.

**Note**: You can always cause a specific user to "scan" again by modifying their properties in the User Editor. Likewise, you can cause a new scan check for a specific job profile by setting the auto-assign targets again. Both of these actions reset time stamps for individual entities.

#### 3.Offline Bulk Auto-Assign

To force assignments even when users are not logged in, offline assignment processing must be

configured. This option is typically DISABLED by default, as it can have a big impact on the system.

4.Click the **Execute** button. A confirmation message will be displayed on your screen. A confirmation message will be displayed on your screen.

Click **OK** to proceed, otherwise, click Cancel. When **OK** is selected, a message is displayed to confirm that the new setting is saved.

# Listing Auto-Assign User List

This section teaches you on how to generate the auto-assign user list base on the specified dates. To do this:

Click the Profile Auto-Assign Console tab. Select the assignment dates.

- Click the **Calendar button** to display the calendar.
- Specify the start time and end time of the execution. Use the hour drop down button and the minute's drop down button located after the calendar button. Click the Execute button. A confirmation message will be displayed on your screen

#### Profile Auto-Assign Console

Profile Auto-Assign Console Auto-Assign User Li	st
Select a date range to list those users who were ass	signed job profiles in the interval auto assignments are explicitly tagged in the listing.
Select Assignment Dates Between	(not specified) The specified O I O I
Submit	(not specified)

The result gives you the auto-assign user list. Click the **Submit** button.

Profile Auto-Assign Console

 Profile Auto-Assign Console
 Auto-Assign User List

 Select a date range to list those users who were assigned job profiles in the interval -- auto assignments are explicitly tagged in the listing.

 Select Assignment Dates Between...

 And

 Oct 31, 2012

 Submit

Auto-Assign User List

Job Profile 🔹	Name 👻	Assignment Date	٥	
Job Profile 2	STUDENT New (EMPNO001)	Oct 29, 2012 5:53 PM GMT+08:00		
Job Profile 2	STUDENT New (EMPNO004)	Oct 29, 2012 5:53 PM GMT+08:00		
Job Profile 2	STUDENT2 New2 (EMPN0002)	Oct 29, 2012 5:53 PM GMT+08:00		
Product Management	STUDENT New (EMPNO001)	Oct 29, 2012 5:59 PM GMT+08:00		
Product Management	STUDENT New (EMPN0004)	Oct 29, 2012 6:00 PM GMT+08:00		
Product Management	STUDENT2 New2 (EMPNO002)	Oct 29, 2012 6:00 PM GMT+08:00		
This is the name	STUDENT2 New2 (EMPNO002)	Oct 29, 2012 5:47 PM GMT+08:00		

# Competency Group Editor

(available for Performance and Learning only)

The Competency Group Editor allows you to do following tasks:

- Create and Manage the Job Profile Groups
- Create and Manage the Competency Groups
- Associate the Job Profile Group with the Catalog and Job Profile
- Associate the Competency Group with the Catalog and Job Profile

# **Creating a Job Profile Group**

Click the Groups button under Job Profiles tab.

Manage >

Competency Manager

Library Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search
	2		🕞 Groups 🖉 A	Auto-Assign Console
Catalogs + -	[x -]	Job Profile Na	me	A (
⊿ [ Catalogs			There are no item	ns to display.
E Catalog for ABC General The Catalog of Rob				

The Job Profile Group Editor displays on the new window. Click the New icon.



The screen refreshes. Click the Create Job Profile Group hyperlink.

Competency Group Editor	
Job Profile Groups Competency Groups General (catalog is empty) Refresh	<b>Create/Edit</b> Create competency objects for inclusion in the job profile and competency catalogs. Permissions on these objects will depend upon the catalog to which they are assigned.
	Create Job Profile Group Create Competency Group

Enter the job profile details as listed:

- Reference code
- Name (Job Profile Group Name)
- Job Catalog (the job catalog where the job profile group is associated)
- Description
- Active (tick the box to make the status of the job profile group to become active)
- Select the certification associated with the job profile group.
| Competency Group Editor                                                                          |                                                                                                                   |                                                             |
|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| Job Profile Groups<br>Competency Groups<br>General Job Catalogs<br>(catalog is empty)<br>Refresh | Create Job<br>Reference<br>Code:<br>Name:<br>Job<br>Catalogs:<br>Description<br>(maximum<br>2,000<br>characters): | Profile Group         New Job Profile Group         General |
|                                                                                                  | Certification:                                                                                                    | Active                                                      |

Click the Save icon.

# Adding a Job Profile to Job Profile Group

From the job profile group editor, click the **Add Job Profiles...** link. The menu for adding job profile displays. Use this menu to select a job profile. The selected job profile is displayed on this box. If you want to remove the job profile, click the **Remove Job Profiles Group.** 

Competency Group Editor						
Job Profile Groups Competency Groups General Job Catalogs	New Job Profi	New Job Profile Group 1				
(catalog is empty)	Reference Code:	New Job Profile Group 1				
Refresh	Name:	New Job Profile Group 1				
	Job Catalogs:	General				
	Description (maximum 2,000 characters):	New Job Profile Group 1				
		Z Active				
	Certification: 꼥					
	Job Profiles					
	Add Job Profiles Remove Job Profiles	Job Profile 2				
	This job profile group co	ontains the job profiles listed below.				
	Reference Code	A Name Catalog				
	There are no items to d	fisplay.				

Click the Save icon to save the updates. Once saved, the job profile will be listed on the job profile list.

Competency Group Editor				~		
Job Profile Groups Competency Groups General Job Catalogs	New Job Profi	le Group 1				
(catalog is empty)	Reference Code:	New Job Profile Group 1				
Refresh	Name:	New Job Profile Group 1				
	Job Catalogs:	Job Catalogs: General				
	Description (maximum 2,000 characters):	New Job Profile Gro	up 1			
		Z Active				
	Certification: 🧿					
	Job Profiles					
	Add Job Profiles Remove Job Profiles		*			
	This job profile group c	ontains the job profiles listed b	elow.			
	Reference Code	<ul> <li>Name</li> </ul>	Catalog			

To remove the job profile from the list, click the Remove from Group...link.

# **Modifying Job Profile Group**

Click the Groups button under Job Profiles tab.

Manage >

**Competency Manager** 

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search
				🕞 Groups 🕼 A	Auto-Assign Console
Catalog	ıs 🕂 –	× - 🔲	Job Profile	Name	· 🏠
۵ 👔 C	atalogs			There are no item	ns to display.
	Catalog for ABC   General   The Catalog of Rob				

The *Competency Group Editor* displays on the new window. Click the **Job Profile Groups** tab. Select the job profile group you want to modify.

Competency Group Editor	
Job Profile Groups	Click on a tab in the left frame to switch between Job Profiles and Competencies, and list the
Competency Groups	items in a given catalog by simply selecting the name in the drop-down list.
General Job Catalogs	All items are organized into catalogs for controlling access to collections of profiles and
• New Job Profile Group 1	competencies. Learners and managers do not see these catalogs, but are restricted to
Refresh	selecting items from those for which they have read permissions.

The *Competency Group Editor* displays on the new window. Start modifying the job profile group details.

Competency Group Editor			z 🖸 🗘 🤋	X		
Job Profile Groups Competency Groups General Job Catalogs (catalog is empty)	New Job Profi	New Job Profile Group 1				
	Reference Code:	New Job Profile Group 1				
Refresh	Name: Job Catalogs:	New Job Profile Group 1 General				
	Description (maximum 2,000 characters):	New Job Profile Grou	np 1			
		I Active				
	Certification: 🧿					
	Job Profiles					
	Add Job Profiles Remove Job Profiles		*			
	This job profile group c	ontains the job profiles listed be	low.			
	Reference Code	∧ Name	Catalog			
	JP2	Job Profile 2	General	Remove from Group		

Click the **Save** button to keep the changes.

# **Creating a Competency Group**

Click the Groups button under Job Profiles tab.

/lanage >						
Compe	etency Manager	n				
Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
		2		🕞 Groups 🖉 /	Auto-Assign Con:	sole
Catalog	is 🕂 –		Job Profile	Name		· •
۵ <u>ا</u> ۵	atalogs Catalog for ABC General The Catalog of Rob			There are no iten	ns to display.	

The Job Profile Group Editor displays on the new window. Click the New icon.

Competency Group Editor	□ ■ ৳ ☴ ◙ ♡ ? ×
Job Profile Groups	Click on a tab in the left frame to switch between Job Profiles and Competencies, and list the
Competency Groups	items in a given catalog by simply selecting the name in the drop-down list.
General Job Catalogs	All items are organized into catalogs for controlling access to collections of profiles and
(catalog is empty)	competencies. Learners and managers do not see these catalogs, but are restricted to
Refresh	selecting items from those for which they have read permissions.

The screen refreshes. Click the Create Competency Group hyperlink.

Competency Group Editor	
Job Profile Groups Competency Groups General Job Catalogs (catalog is empty) Refresh	<b>Create/Edit</b> Create competency objects for inclusion in the job profile and competency catalogs. Permissions on these objects will depend upon the catalog to which they are assigned.
	Create Job Profile Group
	Create Competency Group

Enter the competency group details. Once you have entered the details, click the Save icon.

Job Profile Groups Competency Groups	Create Compe	etency Group
General Job Catalogs New Job Profile Group 1 Refresh	Reference Code: Name: Competency Catalog: Description (maximum 2,000 characters):	New Competency Group (2) General

Enter the following competency group details:

- Reference code
- Name (Competency Group Name)
- Competency Catalog (the competency catalog where the competency group is associated)
- Description
- Active (tick the box to make the status of the job profile group to become active)

# Adding Competency to a Competency Group

From the competency group editor, click the **Add Competencies...** link. The menu for adding competency displays. Use this menu to select a competency. The selected competency is displayed on this box. If you want to remove the competency, click the **Remove Competencies**.

Competency Group Editor						
Job Profile Groups Competency Groups General Job Catalogs New Job Profile Group 1	New Competency Group (2)					
	Reference Code:	New Competency Group (2)				
Refresh	Name:	New Competency Group (2)				
	Competency Catalog:					
1	Description (maximum 2,000 characters):	New Competency Group (2)				
		V Active				
	Competencies					
	Add Competencies Remove Competencies	A1 - Manage your own resourc				
	This competency group cont	ains the competencies listed below				
	Reference Code	Name	Catalog			
	There are no items to display	1.				

Click the **Save** icon to save the updates. Once saved, the competency will be listed on the competency list. To remove the competency from the list, click the **Remove from Group...**link.

Competency Group Editor			ł.				
Job Profile Groups Competency Groups General Job Catalogs • New Job Profile Group 1	New Competency Group (2)						
	Relefence Code.	New Competency Group	(2)				
Refresh	Name:	New Competency Group (2)					
	Competency Catalog:	General					
	Description (maximum 2,000 characters):	New Competency Grou	p (2)				
	Competencies						
	Add Competencies		*				
	Remove Competencies		*				
	This competency group contains the	e competencies listed below.					
	Reference Code	lame	Catalog				
	A1 - Manage your own resources A	1 - Manage your own resources	A: Managing self and personal skills	Remove from Group			

# Searching for Job Profile Group and Competency Group

To search for a job profile group or competency group:

- 1. From the competency group editor, Click the **Search** icon.
- 2. Filter the search result using the parameters stated just below the image.
  - Tick the active box to display all active groups
  - Select which group you want to display (Job Profile Group or Competency Group)
  - You can enter the name of the group or the reference code.

3. Click the Search button to start the searching process

Competency Group Editor	· [	
Job Profile Groups Competency Groups	Search Job F	Profiles and Competencies
General Job Catalogs	When searching, a pools you are auth	wildcard match is performed against the title text for entries in orized to use.
GENERAL	Active:	
<ul> <li>New Job Profile Group 1</li> </ul>	Туре:	<ul> <li>● Job Profile Groups</li> <li>○ Competency Groups</li> </ul>
Refresh	Name:	
	Reference Code:	
		Search

# **Ranking Users**

User Ranking is an administrator function that allows you to search for and rank users according to the number of competencies satisfy. You would first construct a Job Profile containing the three competencies below then use the User Ranking function to retrieve a list of users ranked according to how well they satisfy the profile's requirements if want to find out which users satisfy the following competency requirements:

- Time Management
- Project Management
- Word Processing

1. From the competency group editor, Click the User Ranking icon.

- 2. Select a job profile from the drop down list box.
- 3. Users with one or more competency that matches the job profiles will be listed.

Competency Group Editor						
Job Profile Groups	User Ranking					
General Job Catalogs						
Refresh	A search is done to match learners with the set of competencies within learner does not need to have been assigned the profile, as the search competencies only, with a percentage ranking then returned.	the selected Job Profile. The checks for completed				
_	Job Profiles					
	Select a job profile set from the drop down box. Users with one or more competency matches are then listed below.	Quality Management 💌				
	Name	Rating				
	STUDENT3 New3 (EMPN0003)	50%				

# **Generating Competency Reports**

To generate competency reports:

1. From the competency group editor, Click the **Competency Reports** icon.

2. The Report Listing is displayed. From the list of competency reports, select the report you want to generate by clicking the report name or the book icon. Each report may be prompted for some additional parameters.

Competency Group Editor	□ ⊟ & ⊊ 🚰 ? ×				
Job Profile Groups Competency Groups General Job Catalogs • New Job Profile Group 1	Report Listing Click on the icon to start the report process. Depending on the report selected, you may be a additional parameters.	prompted for some			
Refresh	Title 20	Report Help			
	R112 Competency Report by Organization	0			
	R113 Job Profile Report by Organization	0			
	R116 Job Profile Status Summary Report by Organization	0			
	R117 Job Profile Status Summary Report by Organization (Tabular)	0			

# Assessment Management

(available for Performance only)

The Assessment Management allows the user to maintain the assessment templates. These Assessment Templates are templates used by the managers to assess the competency of the learner(s). On the assessment management you can do the following tasks:

- Create a new assessment template
- Edit an assessment template
- Clone an assessment template
- View an active assessment template
- Delete an assessment template

There are two ways to get into Assessment Management, first, from **Manage Center** scroll down the screen until you find **Talent > Competency Manager > Assessment Management**. The other way is from the Manage Center main menu, click **Talent > Competency Manager > Assessment Management**.

~	NetDimens	sions Talent S	uite	Manage Center			а.	🛎 MOLINA Alon	Logout
	OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
	Compliance	Analytics	C	empetency Manager		Goal Manager		Appraisal Manager	
	Organization	n Analysis	Li	brary		Goal Manage	r	Templates	
	Org Summa	ary Analysis	C	ompetency Models				Appraisal Status Category	
	Appraiser A	nalysis	P	oficiency Levels				Group Email	
	User Group	Analysis	Jo	b Profiles				Appraisal Search	
			A	ssessment Manageme	ent				
			U	ser Search					
	VITUALLIA	SSUUTE ALLOUD	COMPUTE					DOLUMER AND THE CALEMAN AND THE STREET	2 C

# **Creating an Assessment Template**

The assessment template allows you to define the requirements on assessing the learner. On the assessment template you can specify the following:

- · The source of competency to be used for assessment
- Validity of the competency assessment template.
- Specify the appraisal type
- Specify the notification email to be sent to the learner.

To create a new assessment template, go to **Manage Center > Talent**, under the *Competency Manager* click the **Assessment Management**. This opens the *Assessment Management* screen. Click the **Create Assessment Template** button.

NetDimensions	Talent Suite	Manage Center			🚨 MOLINA AId	on Logout
OVERVIEW LE	ARNING TALENT	COMMUNICATE USE	RS REPORTS	SYSTEM		
Competency	/ Manager					
Library Compe	tency Models Profici	iency Levels Job Profiles	Assessment Ma	nagement User Search		51
Assessment Tem	plates Active Assess	sments				
Bulk Action					+ Create Assessment	Template
Ass Ass	essment Title			Expiry Date	te	\$
Ass	essment Template 1					

The new assessment template will be displayed:

#### **Competency Manager**

Library	Competency Mo	dels Proficient	y Levels J	ob Profiles	Assessment Management	User Search	
Assessr	nent Templates	Active Assessme	ents				
Detail	Δ						
Detail							
Title*							
Require	ed						
Descript	ion						
Instructi	ons					10	
	4000						
Valid Fr	om					le	
(not sp	ecified)						
Valid To							
(not sp	ecified)						
Permiss	ions						
Compe	etency Source						
Competer	ncies for assessme	int are selected fr	om*				
∐Use co ⊡Use rev	mpetencies from jo viewee's competenc	b-profile cies					
Use co	mpetencies selecte	ed at time of depl	oyment				
Use co	mpetencies selecte	ed below					

A. The Detail section requires you to enter the following:

- Title or name of the assessment template
- Description of the assessment template
- Instructions on how fill up the assessment template
- Validity dates (to and from)Permission to access this object

#### **B.** Competency Source

Allow the users to optionally specify a list of competencies (or competency models) within the assessment templates. This list of selected competencies will then be automatically added to the assessment at the time of deployment.

Rater Options						
Reviewee Options						
Allow Employee to participat	e					
ODue Date: (not specified)	1	or	Days from Assignment:	30	Weight ratio:	1.0
Primary Reviewer Options						
ODue Date: (not specified)	1 2	or	Days from Assignment:	30	Weight ratio:	1.0
Secondary Reviewer Optic ^{Peer}	ons					
Number of Reviewers: 1						
ODue Date: (not specified)	1 1 2	or	Days from Assignment:	30	Weight ratio:	1.0
Subordinate						
Number of Reviewers: 1						
Due Date: (not specified)	1 😁 🥜	or	Days from Assignment:	30	Weight ratio:	1.0
Additional Manager						
Number of Reviewers: 1						
ODue Date: (not specified)	1 🔁 🤌	or	Days from Assignment:	30	Weight ratio:	1.0
Access Contro						
Display Settings						
Display required proficiency lo	evel on assessments					
Display reviewer name of pee	rs, subordinates and	additional r	nanagers			
Display reviewer evidence/ove	erall comments of pee	ers, subordi d additional	nates and additional manager	Б		
Display reviewee's previous p	roficiency level	u auditional	managers			
Access Control Settinas						
Allow secondary reviewers to	finish partial assess	ment				
Allow Reviewee to select sec	ondary reviewers					
Allow primary reviewer to con	trol final rating					

#### C. Rater Options

Secondary reviewers have been categorized into three separate groups for a more granular control of the assessment:

- Peers
- Subordinates
- Additional Managers

#### D. New Display Settings

New display settings have been incorporated into the assessment template as follows:

- · Display reviewer name of peers, subordinates and additional managers
  - This setting controls whether the name of secondary reviewers will be displayed on the "Sign Off" page for primary reviewer and on the "Assessment Report" page for the reviewee.
- · Display reviewer evidence/overall comments of peers, subordinates and additional managers
  - This setting controls whether the evidence and overall comments entered by the secondary reviewers will be displayed on the "Sign Off" page for primary reviewer and on the "Assessment Report" page for the reviewee.
- Display reviewer ratings of peers, subordinates and additional managers
  - This setting controls whether the rating entered by the secondary reviewers will be displayed on the "Sign Off" page for primary reviewer and on the "Assessment Report" page for the reviewee.
- Display reviewee's previous proficiency level
  - · When this option is ticked in the Assessment Template, users are able to view the

reviewee's previous proficiency level from the proficiency level popup.

#### Competency Assessment

siane.	Select	a level	×	RATOR System
	Netwo	ork design		
escrip Pro				8
struc	Level	Description		
o Pro		Does not meet any criteria		
mpe • QA Iom	5	Produces outline system designs and specifications, and overall architectures, topologies, configuration databases and design documentation of networks and networking technology within the organisation. Specifies user/system interfaces, including validation and error correction procedures, processing rules, access, security and audit controls. Assesses associated risks, and specifies recovery routines and contingency procedures. Translates logical designs into physical designs		
ta	6	Takes responsibility for major aspects of network specification and design within the organisation. Produces network design policies, philosophies and criteria covering connectivity, capacity, interfacing, security, resilience, recovery, access and remote access.	⁴ Previous Level	

#### **New Access Control Settings**

The following settings have been added to the assessment template to control access:

- · Allow secondary reviewers to finish partial assessment
  - This setting allows the secondary reviewers to select "N/A (Not Applicable)" as the proficiency level when performing a competency assessment. This scenario may be applicable when a secondary reviewer does not want to rate the reviewee on a competency that he/she has no knowledge of.
- Allow Reviewee to select secondary reviewers
  - This setting allows the reviewee to select his/her own set of secondary reviewers. Selecting this option in the template will delay the secondary reviewer selection until after an assessment has been deployed (Direct appraiser is no longer required to select the secondary reviewers during deployment stage). Once the reviewee selects the secondary reviewers, they will need to be approved by the primary reviewer before assessments by those secondary reviewers can be carried out. (See Performing Formal Assessments)
- Allow primary reviewer to control final rating
  - This setting allows the primary reviewer to override the calculated average rating with his/her own final rating during the Sign off stage. Selecting this option means the primary reviewers will not be able to begin the competency assessment until *all* other reviewers have finished their assessments. (See Performing Formal Assessments)

Notifications			
Send Notifications			
After Deployment:	[	Q (1)	To: All participants
Sign Off Reminder:		8 🜍	To: Primary reviewer
After Sign Off:		8 💟	To: All participants
Reminders:	Once 💌	8 🕥	To: All participants
Overdue notification:	31	Q ()	To: All participants
Reviewer Finishes Assessment:		8 🜍	To: Primary reviewer
Requiring reviewee to select reviewe	Irsi	8 🛈	To: Reviewee
Approval for reviewee selected review	wers:	Q ()	To: Primary reviewer
Primary reviewer accepts selected r	reviewers:	4	To: All participants

#### 🛢 Save 🗖 🕈 Cancel

#### E. Competency Assessment Notifications

This feature allows the user to designate email templates for the following type of competency assessment notifications:

- · Email notifications to all participants after the deployment
- Email Sign Off Reminder to the primary reviewer
- · Email notifications to all participants after signing off
- Email notifications Reminders for all participants
- Email overdue Notification for all participants
- · Review Finishes Assessment email notification for the primary reviewer
- Email notification for the reviewee about requiring him/her to select reviewers
- · Email notification for the primary reviewer for approving the the selected reviewers
- Email notifications for all participant informing that the primary reviewer accepts the selected reviewers

To assign an email template:

- Click the Select button of the competency assessment notification. The menu for selecting email template is displayed.
- Using the email template editor, select the email template from the list.
- Click the Select button to choose. This leads you back to the Assessment Template screen.

E-mail Template Editor		R 7 X					
Templates							
System Default	ENGLISH Add New Language						
Suser Templates     APPRAISAL WORKFLOW TRAINING     REQUEST	Save Create a Copy Cancel Usage			Delet			
<ul> <li>Approval Expired Notification</li> </ul>							
Copy of-SUBMIT AGREED APPRAISAL     Not-Yet-Accessed Reminder	Name Session Completion Notification						
<ul> <li>Session Completion Notification</li> </ul>	Sender						
SUBMIT AGREED APPRAISAL	Specify the sender of the email.						
<ul> <li>SUBMIT PENDING APPRAISAL</li> <li>SUBMIT REVIEW APPRAISAL</li> </ul>		8 0					
SUBMIT STARTED APPRAISAL	Recipients						
	Select from the list below the intended recipients for this message.						
		То	CC	Omitted			
	Approver	0	0	۲			
	Participant	۲	0	O			
	Direct Appraiser	0	۲	0			
	LID M			in the second			

**Note:** To remove the assigned email, click the **Remove** button of the preferred competency assessment notification.

-Notifications		
Send Notifications		
After Deployment:	SUBMIT AGREED APPRAISAL	To: All participants
Sign Off Reminder:		To: Primary reviewer
After Sign Off:		To: All participants

# Modifying the Assessment Template Details

To modify the assessment template, from the **Assessment Templates** screen, click the assessment title or click the **Tools** icon and then select **Edit Template**.

Manage >	1	M	a	n	a	q	e	>
----------	---	---	---	---	---	---	---	---

**Competency Manager** 

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Assessi	ment Templates	e Assessments				
Bulk A	Action 💌				•	Create Assessment Template
	Assessment Title			¢ E	Expiry Date	\$
	Sample3			J.	lul 20, 2012	
	Assessment Tem	plate 1		1	Vov 30, 2012	
	Edit Template	e 2		1	Vov 30, 2012	
	Assessment Tem	plate 3		(	Det 31, 2012	

This opens the Assessment Template details. Start modifying assessment template.

ibrary	Competency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
ssessm	nent Templates Act	ive Assessments				
Details	5					
litle*						
Assessi	ment Template 1					
Descripti	on					
Assess	sment Template 1					
nstructio	ons				h:	
Assess	ment Template 1					
/alid Fro	m				.40	
(not spe	ecified) 👘 🧮	>				
/alid To						
(not spe	ecified) 🧮 🔚	>				
Permissi	ons					
Compe	etency Source					
Compete	ncies for assessment	are selected from* profile				
Use co	viewee's competencies					

Java					
Rater Options					
eviewee Options					
Inst specified	-	or	Days from Assignment	30	Weight ratio 10
Due Date:					
rimary Reviewer Options					
Due Date: [not apacified]	. 🚍 🤌	or	Days from Assignment	30	Weight ratio: 1.0
econdary Reviewer Option	S				
umber of Reviewers: 1					
Due Date: (not specified)		or	Days from Assignment.	30	Weight ratio: 1.0
ubordinate	And the second second				
umber of Reviewers: 0					
Due Date Inst specified		or	Days from Assignment:	30	Weight ratio: 1.0
ddtional Manager					
lumber of Reviewers: 0					
Due Date: (nut specified)		or	Days from Assignment	30	Weight ratio: 1.0
Due Date.					- 1+
Access Controls Display Settings Display required proficiency lev Display reviewer name of peers Display reviewer evidence/overa	el on assessments , subordinates and II comments of pee	additional n	nanagers nates and additional managers	5	
Access Controls Display Settings Display required proficiency lew Display reviewer avridence/overa Display reviewer avridence/overa Display reviewer avridence/overa Display reviewer is previous prof Access Control Settings Pallow Reviewer to select secon Pallow primary reviewer to control	el on assessments subordinates and li comments of pee s, subordinates and iciency level hish partial assesser dary reviewers il final rating	additional n rs, subordi d additional ment	nanagers nates and additional managers managers	8	
Access Controls Display Settings Display required proficiency lev Display reviewer name of peers Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer's previous prof Access Control Settings Dallow secondary reviewers to fir Dallow Reviewee to select secon Dallow primary reviewer to contro Notifications	el on assessments , subordinates and ll comments of pee s, subordinates and iciency level ush partial assess dary reviewers d final rating	additional n ers, subordin d additional ment	nanagers nates and additional managers managers	5	
Access Controls Display Settings Display reviewer name of peers Display reviewer raings of peer Display reviewer raings of peer Display reviewer stings of peer Display reviewer's previous prof Access Control Settings (Allow secondary reviewers to fir Callow Reviewee to select secon (Allow primary reviewer to control Notifications and Notifications	el on assessments subordinates and ll comments of pee s, subordinates and iciency level nish partial assess dary reviewers il final rating	additional n rs, subordin d additional ment	nanagers nates and additional managers managers	8	
Access Controls Display Settings Display reviewer name of peers Display reviewer name of peers Display reviewer ratings of peer Display reviewer's previous prof Display reviewer's previous prof Allow secondary reviewers to fin CAllow Reviewee to select secon Allow primary reviewer to contro Notifications iend Notifications fier Deployment	el on assessments subordinates and ll comments of pee s, subordinates and iciency level nish partial assess dary reviewers dary reviewers ll final rating	additional n irs, subordi d additional ment	nanagers nates and additional managers managers	60	To: All participants
Access Controls Display Settings Display required proficiency levi Display reviewer avidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer stofing Access Control Settings CAllow Reviewer to select secon DAllow primary reviewers to for DAllow primary reviewer to control Callow primary reviewer to contr	el on assessments subordinates and li comments of pee s, subordinates and iciency level nish partial assess dary reviewers il final rating	additional n ris, subordi d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer
Access Controls Display Settings Display reviewer didence/overa Display reviewer ratings of peer Display reviewer ratings of peer Display reviewer ratings of peer Display reviewer ratings of peer Display reviewer to strongs (Allow Reviewee's previous prof Allow Reviewee to select secon Callow primary reviewer to control Allow Primary reviewer to control	el on assessments , subordinates and II comments of pee s, subordinates and iciency level ush partial assess dary reviewers I final rating	additional n rrs, subordin d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer To: All participants
Access Controls hisplay Settings Display reviewer proficiency leve Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Allow Reviewee's previous prof (Allow Primary reviewer to control (Allow Primary reviewer) (Allow P	el on assessments , subordinates and li comments of pee s, subordinates and iciency level hish partial assess dary reviewers d final rating	additional n ers, subordi d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer To: All participants To: All participants
Access Controls isplay Settings Display reviewer proficiency lew Display reviewer name of peers Display reviewer ratings of peer Display reviewer's previous prof Display reviewer's previous prof Allow Secondary reviewers to fin Allow Reviewee's o select secon Allow primary reviewer to control Notifications fier Deployment: ign Off Reminder: fier Sign Off: eminders: verdue notification;	el on assessments subordinates and li comments of pee s, subordinates and iciency level hish partial assess dary reviewers dary reviewers di final rating	additional n rs, subordin d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer To: All participants To: All participants To: All participants To: All participants
Access Controls bisplay Settings Display reviewer proficiency leve Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer strings of peer Display reviewer's previous prof Allow secondary reviewers to fin (Allow Reviewee's previous storing (Allow primary reviewer to control Allow primary reviewer to control Notifications fier Deployment: ign Off Reminder: fier Sign Off. eminders; verdue notification; eviewer Finishes Assessment.	el on assessments subordinates and li comments of pee s, subordinates and iciency level hish partial assessor dary reviewers il final rating	additional n rs, subordin d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer To: All participants To: All participants To: All participants To: All participants To: Primary reviewer
Access Controls Display Settings Display reviewer proficiency lew Display reviewer revidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer to genes Display reviewer to select secon CAllow Reviewe to select secon CAllow Reviewe to select secon CAllow Reviewe to select secon CAllow Reviewer to control Callow Reviewer Callow Reviewer to control Callow Reviewer C	el on assessments subordinates and il comments of pee s, subordinates and iciency level wish partial assess dary reviewers of final rating	additional n ers, subordin d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer To: All participants To: All participants To: All participants To: All participants To: Primary reviewer To: Reviewee
Access Controls Display Settings Display Settings Display reviewer proficiency lew Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer evidence/overa Display reviewer soften Display reviewer idence/overa Display reviewer is previous prof Access Control Settings (Allow Reviewe to select secon Datification: Reviewer Finishes Assessment Reviewer Finishes Assessment Reviewer for select review	el on assessments , subordinates and li comments of pee s, subordinates and iciency level ush partial assess dary reviewers di final rating	additional n rrs, subordin d additional ment	nanagers nates and additional managers managers		To: All participants To: Primary reviewer To: All participants To: All participants To: All participants To: Primary reviewer To: Reviewee To: Primary reviewer

Once the changes have been made, click the **Save** button to keep the updates.

# **Cloning the Assessment Template**

There are two ways to clone an assessment template:

The first method is using the **Clone** button on the Assessment Templates page. Tick the box of the template you want to clone then click the **Bulk Action** dropdown button and then select **Clone**.

#### Manage >

Competency Manager

Library	Co	mpetency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Assess	ment	Templates Active	e Assessments				
Bulk	Actior	1				+	Create Assessment Template
Bulk . Delet	Actior e	sessment Title			٥	Expiry Date	0
Clone	-	Sample3				Jul 20, 2012	
	¢	Assessment Tem	plate 1			Nov 30, 2012	
	¢	Assessment Tem	plate 2			Nov 30, 2012	
	¢	Assessment Tem	plate 3			Oct 31, 2012	

The other way of cloning the assessment template is using the **Clone** button on the Assessment Template Details page. To do this, click the assessment title or click the **Tools** icon and then select **Edi t Template**.

Manage	>						
Comp	etency Mar	age	r				
Library	Competency N	odels	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Asses	sment Templates	Activ	e Assessments				
Bulk	Action 💌					+	Create Assessment Template
	Assessm	nt Title			\$	Expiry Date	٥
	Sample3					Jul 20, 2012	
	Assessme	nt Terr	plate 1			Nov 30, 2012	
	Edit Template		e 2			Nov 30, 2012	
	Assessme	nt Terr	plate 3			Oct 31, 2012	

This opens the Assessment Template details. On the **Assessment Template Details** page, click the **CI one** button located at the bottom of the page.

Annroval for reviewee selected reviewers	To: Primary reviewer
Primary reviewer accepts selected reviewers:	To: All participants

# **Deleting the Assessment Template**

There are two ways to delete an assessment template:

The first method is using the **Delete** button on the Assessment Templates page. Tick the box of the template you want to remove, then click the **Bulk Action** drop down button and then select **Delete**.

#### Manage >

Manage >

**Competency Manager** 

Library	Competency Models	Proficiency Levels	Job Profiles	Assessment Managemen	User Search	
Assessn	ment Templates Active	Assessments				
Bulk A	Action 💌				+	Create Assessment Template
Bulk A	sessment Title			-	Expiry Date	\$
Clone	🗣 Sample3				Jul 20, 2012	
	Assessment Tem	plate 1			Nov 30, 2012	
	• Assessment Tem	plate 2			Nov 30, 2012	
V	Assessment Tem	plate 3			Oct 31, 2012	

The second method is using the **Delete** button on the Assessment Template Details page. To do this, click the assessment title or click the **Tools** icon and then select **Edit Template**.

Comp	etency Manager	
Library	Competency Models Proficiency Levels Job Profiles	Assessment Management User Search
Assessi	ment Templates Active Assessments	
Bulk A	Action 💌	+ Create Assessment Template
	Assessment Title	Expiry Date
	Sample3	Jul 20, 2012
	Assessment Template 1	Nov 30, 2012
	Edit Template e 2	Nov 30, 2012
	Assessment Template 3	Oct 31, 2012

This opens the Assessment Template details. On the **Assessment Template Details** page, click the **D** elete button located at the bottom of the page.

Approval for reviewee selected reviewers:	To: Primary reviewer
Primary reviewer accepts selected reviewers:	To: All participants

# Viewing the list of Active Assessments

To view the list of active assessments, click the **Assessment Management** tab, then click the **Active Assessments** tab to see the list of active assessments.

Manage >

Competency Manager

Librai	ry Competency Mode	s Proficiency L	_evels Job Profiles	Assessment Ma	nagement User Search	
Asse	ssment Templates	tive Assessments	5			
Bu	Ik Action 💌					
	Assessment Title	Date Created	Employee 🗘	Primary Reviewer	Secondary Reviewers	Status 🗘
	Assessment Template 1	Oct 30, 2012	STUDENT New	MOLINA Alon	STUDENT New, STUDENT3 New3, MOLINA Ald	n In Process
	Assessment Template 2	Oct 30, 2012	STUDENT3 New3	MOLINA Alon		In Process
	Sample3	Jul 16, 2012	STUDENT New	MOUNA Alon		In Process

#### The page displays the following information

- Assessment template
- Date created
- Reviewee
- Primary reviewer
- · Secondary reviewer
- Status

Also, on this page, you can delete an active assessment. To do this, tick the box of the template you want to remove and the click the **Bulk Action** drop down button and select **Delete**.

anay	e >							
on	petency Manag	er						
Libra	ry Competency Models	s Proficiency L	evels Job Profiles	Assessment Ma	nagement	User Search		
Acce	Account Tomplatac	tiva Accacemente						
1000	soment remplates	Ine Assessments						
Bu	Ik Action	ine Assessments						
Bu	Ik Action  Ik Action Itk Action Itk Action Itk Action Itk	Date Created \$	Employee	Primary Reviewer	Secondar	y Reviewers	\$	Status 🗘
Bu Bu De	Ik Action  Ik Action Ik Action Itete Assessment Template 1	Date Created 0 Oct 30, 2012	Employee C STUDENT New	Primary Reviewer MOLINA Alon	Secondar STUDENT	y Reviewers T New, STUDENT3 New3,	≎ MOLINA Alon	Status 🗘
Bu Bu De	Ik Action  Ik Action It Ac	Date Created C Oct 30, 2012 Oct 30, 2012	STUDENT New STUDENT3 New3	Primary Reviewer MOLINA Alon MOLINA Alon	Secondar STUDEN	y Reviewers 7 New, STUDENT3 New3,	OLINA Alon	Status 🗘 In Process In Process

# **User Search**

This feature allows you to search user base on the job profile or competency. To do this:, click the User Search tab.



Search result can be filtered according to any the following:

- · Users who have job profiles or competencies
- Searching the text that matches the text entered on the containing field box.

Click the Search button to start the searching process. The search result will be listed

#### Manage >

#### **Competency Manager**

Library Com	petency Models	Proficiency Levels	Job Profiles	Assessment Management	User Search	
Search Crite	ria					
Find users who	have Job Profile	s 💌 containing		Sear م	ch	
Show: 10 💌					Filter	
User ID	▲ F	irst Name	≎ La	st Name	\$ Job Profile	\$
empno001	N	ew	Ste	udent	This is the name	
empno001	N	ew	Ste	udent	Job Profile 2	
empno001	N	ew	Ste	udent	Product Management	
empno001	N	ew	Ste	udent	Quality Management	
empno002	N	ew2	Ste	udent2	This is the name	
empno002	N	ew2	Ste	udent2	Job Profile 2	
empno002	N	ew2	Ste	udent2	Product Management	
empno002	N	ew2	Ste	udent2	Quality Management	
empno003	N	ew3	Ste	udent3	Quality Management	
empno004	N	ew	Ste	udent	Job Profile 2	
Search Result: 1	to 10 of 13					

# **Goal Management**

(available for Performance and Learning only)

Goal Management features allows the user to create hierarchical goal management

# **Goal Access Controls**

The "Goals" access control has now been divided into two distinct controls, the "*Development Goals*" access control and the "*Performance and Organizational Goals*" access controls. System administrators now have the option to allow roles to have access to one type of goal and not the other.

Review Development Goals	0	0	
Review Performance and Organizational Goals	0	0	

The above are the new access controls for reviewing goals

# **Goal Program**

#### **Creating a Goal Program**

This section shows how to create a goal program: Go to Manage Center > Talent > Goal Programs.

The Goal Manager main menu appears. Click the Add Goal Program button.

#### Goal Manager

TCorp Goal Program 2012	+ Add Organizational Goal	Filter by Category 💌 🔹
P SY Test Plan 2012	Organizational Goals	Category
	O Improve Profitability	Financial
	Decrease cost of sales by 15%	Financial
	Reduce Operating Costs	Financial
	O Minimise Debt	Financial
	O Efficient Billings	Financial
	Improve Customer Satisfaction	Customer
	O Increase Customer Retention	Customer
	Extend Customer Loyalty Program	Customer
	Open New Regions	Learning & Growth
	Recruit Partners	Learning & Growth
	Q Launch New Products	Learning & Growth
	Paperless Office	Internal Process
	🗢 💿 Centralise IT	Internal Process
	Fill Empty Vacancies	Internal Process
	- Condense Detention	

The Add Goal Program screen appears. Enter the following information:

- Name (name of the goal program)
- Description (brief description about the goal program)
- Start Date and End Date (refers to the period covered by the goal program)

····· · · · · · · · · · · · · · ·	×
Name *	
1	
Description *	
Start Date *	
Start Date * (not specified)	
Start Date * (not specified) 🛗 🧼 End Date *	

Click the **Save** button to keep the data. The goal program is displayed on the screen.

tanage >		
ioal Manager		
Goal Programs	2013 1st Quarter Goal Program (Nov 1, 2012 - N	ov 1, 2013)
2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 💌
SY Test Plan 2012	Organizational Goals	Category

#### **Setting Permission to a Goal Program**

This section shows the procedures on how to set permission to a goal program.

**Note:** A user would not be able to link his/her performance goals to an organizational goal if permission is not provided to the user.

To set permission to access:

Goal Manager

On the *Goal Manager*, select the goal program where the permission will be configured. Click the **Gear** icon and then select **Permissions**.

Goal Program	02013 1st Quarter Goal Program (Nov 1, 2012 - N	ov 1, 2013)
2013 1st G	+ Add Organizational Goal	Filter by Category 💌 💿 👻
SY Test PI Permissions	Organizational Goals	Category

#### The Permission Selector pops up on a new window

Read Only Access	Unrestricted Access	
Apply User Targeting Template 😡		
Do not apply, use customized criteria	below V	
Users	0 selected	
Search for a user	***	
One of the following criteria Add criteria by User Group     Add		
Organization	0	
Include Organizations		
ALL		
Fuel de Occasionations		
Evenue viganzannie.		
	. 72)	

To know how to use this menu, refer to Setting Permission to a Competency Model.

#### **Cloning a Goal Program**

This section shows how to clone a goal program. Select the goal program you want to clone, then click the **Gear** icon and then select **Clone**.

Goal Manager

Goal Programs +	02013 1st Quarter Goal Program (Nov 1, 2012 - N	ov 1, 2013)
F 2013 1st Or Edit	+ Add Organizational Goal	Filter by Category 💌 💌 👻
SY Test P Permissions	Organizational Goals	Category

The screen refreshes and the cloned program is displayed with the original filename followed by a number enclosed in parenthesis. The number represents the number of cloned program. For instance, the first cloned represents (1), the second cloned is (2) and so on...

Manage >		
Goal Manager		
Goal Programs + - C	2013 1st Quarter Goal Program (Nov 1, 2012 - No	ov 1, 2013)
2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 🔹 👻
ZCorp Goal Program 2012 SY Test Plan 2012	Organizational Goals	Category

**Note:** The system will clone the hierarchy tree of the organizational goals from the goal program including the ownership of the organizational goals. However, the system will not clone the tracking information of the organizational goals.

## **Removing a Goal Program**

This section shows how to remove a goal program: Select the goal program you want to remove. Then click the **Delete Goal Program** button.

Goal Manager

Goal Programs 🛛 🕂 🗖 📼 🔹	2013 1st Quarter Goal Program(1) (Nov 1, 2012 -	Nov 1, 2013)
2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 🔹 👻
2013 1st Quarter Goal Program(1) ZCorp Goal Program 2012	Organizational Goals	Category

**Note:** Deleting the goal program will also delete all associated organizational goal and categories associated.

Click OK to proceed.

Delete Goal Program	*
Are you sure you want to delete the selected goal program? This will also delete all associa	ated organizational goals and categories.

#### **Editing a Goal Program**

This section shows how to edit a goal program: Select the goal program you want to modify. Then click the **Gear** icon and then select **Edit**.

#### Goal Manager

Goal Programs + - 📼 🕇	02013 1st Quarter Goal Program (Nov 1, 2012 - N	ov 1, 2013)
P 2013 1st Q Edit	+ Add Organizational Goal	Filter by Category 🖃 💷 👻
SY Test Permissions	Organizational Goals	Category

The menu for editing the goal menu appears.

rograms		
Corp Goal F	Edit goal program	× , C:
oals 2013	Name*	iteg
ustomer Se	Goals 2013	
Corp Goal F	Description*	ust
;司目标2012	Excepteur sint obcaecat cupiditat non proident,	
lechanix Go	sunt in culpa qui officia deserunt mollit anim id	
Corp Goal F	clita kasd gubergren, no sea takimata sanctus	
1.1	est. Ut wisi enim ad minim veniam, quis nostrud	
	exercitation ullamcorper suscinit lobortis nist ut	
	E Save to Cancel	

## Adding an Organizational Goal to a Goal Program

To add an Organization Goal to a Goal Program: Select the Goal Program where the Organizational Goal will be added. Click the **Add Organizational Goal** button.

Mailage 7		
Goal Manager		
Goal Programs +	02013 1st Quarter Goal Program (Nov 1, 2012 - No	w 1, 2013)
P 2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 💌
SY Test Plan 2012	Organizational Goals	Category

The New Organizational Goal screen appears. Enter the required parameters as listed

• Title: a required field

Manage

- Category: an optional field
- Description: an optional field
- Owner: an optional field which the employee that manager wants to assign to
- Automatically update tracking when linked performance goals' tracking are updated: Enabling this option will auto calculate and update the given organizational goal's progress whenever a directly or indirectly linked performance goal's progress has been updated, taking on the average of all the progress percentages and the most common status amongst the linked goals.
- Show all trackings: When disabled, tracking records will be filtered such that only records that meet any of the following criteria are displayed:
  - Tracking added manually
  - Tracking that have resulted in a progress or status change
  - Most recent tracking entry
- Allow inclusion in owner's appraisal: If the option is checked, the goal can be loaded in user appraisal.

Note: The Category field allows you to categorize the organizational goal. You can create categories

#### using the category tools. See the next section to know the procedures on how to create category.

Goal Manager > Increase Sales by 10%

Details		
Title*		
Category		
(none) 💌		
Description		
•		
Currer		
Owner		
Search for a user		
Automatically update tracking from subording	ate goals 🖗	
Show all trackings		

To save, click the Save button.

Manager

The New Organizational Goal will be listed.

Coal Managor		
	02013 1st Quarter Goal Program (Nov 1, 2012 - No	w 1. 2013)
2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 🙁 👻
F ZCorp Goal Program 2012 SY Test Plan 2012	Organizational Goals	Category
	O Increase sales by 25%	

**Note:** You can add a sub-organizational goal by clicking the tool button of the organizational goal and then click **Add**.



This leads you to the "New Organizational Goal" editor screen as shown on the previous step of this section. Once the new sub-organization has been entered and saved, the sub-organizational goal will be displayed under the selected organizational goal.

Managa

oal Manager		
Goal Programs + - 💌	0 2013 1st Quarter Goal Program (Nov 1, 2012 - No	ov 1, 2013)
P 2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 🔹 💌
SY Test Plan 2012	Organizational Goals	Category
	O Increase sales by 25%	
	A Improve project planning techniques	

To display the sub-organizational click the expand/collapse button. Do the same step if you want to add another sub-organizational goal to a sub-organizational goal.

#### Listing the Organizational Goal

This section teaches you on how to view the list of the organizational goals. To do this, select the Goal Program where the Organizational Goal you want to view is associated.

Goal Manager

Goal Programs	02013 1st Quarter Goal Program (Nov 1, 2012 - No	v 1, 2013)
F 2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 🔹 💌
F SY Test Plan 2012	Organizational Goals	Category

The list of organizational goals associated to the selected goal program is displayed. Click the expand/collapse button of the Organizational Goal to display the sub-organizational goals.

Goal Programs 🕂 🗖 🚥	OZCorp Goal Program 2012 (Jan 1, 2012 - Dec 31, 201)	2)
1 2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 🖃 💿
SY Test Plan 2012	Organizational Goals	Category
	💠 🗢 Improve Profitability	Financial
	O Increase US profits by 10%	Financial
	O Increase EMEA Profits by 10%	Financial
	O Increase APAC Profits by 13%	Financial
	• O Org1	Learning & Growth
	Decrease cost of sales by 15%	Financial
	💠 🧕 Reduce Operating Costs	Financial
	Minimise Debt	Financial
	O Efficient Billings	Financial
	Improve Customer Satisfaction	Customer
	O Increase Customer Retention	Customer
	Extend Customer Loyalty Program	Customer
	Open New Regions	Learning & Growth
	• O Recruit Partners	Learning & Growth

You can also view the list of the organization goals according to its category. The **Filter by Category** is the default option and lists all the organizational goals in the goal progam. The **<no category>** option only lists the organization goals that are not categorized.

#### Updating the Progress of the Organizational Goal

This section shows how to update the development of the organizational goal by specifying the percentage completion and the status of the goal (pending, critical, behind, on target, completed).

From the list, select the organizational goal you want to update.

#### Goal Manager

egory 💌 🗢 🔻
ategory

The organizational goal editor is displayed on the screen. Under the **Progress** section, click the **Add** bu tton.

Details					
(Decision)					
Title*					
Increase sales	by 25%				
Category					
(none) 💌					
Description					
Increase se	les by 25%				
				4	
Owner					
Owner				0	
Owner					
Owner	y update tracking from subo	rdinate goals ©		RØ	
Owner  Automatical  Show all tra	y update tracking from subo	rdinate goals @		R ()	
Owner  Automatical  Show all tra  Allow inclus	y update tracking from subo ckings on in owner's appraisal	rdinate goals ©			
Owner  Automatical  Show all tra  Allow inclus	y update tracking from subo skings on in owner's appraisal	rdinate goals ©			
Owner  Automatical  Show all tra  Allow inclus  Progress	y update tracking from subo :kings on in owner's appraisal	rdinate goals @			
Owner  Automatical  Automatical  Automatical  Automatical  Progress  Add	y update tracking from subo skings on in owner's appraisal	rdinate goals @			
Owner  Automatical  Show all tra Allow inclus  Progress  Add  Event	y update tracking from subo ckings on in owner's appraisal Date	rdinate goals @	Results	Progress	Status

This opens the Add Progress screen. Enter the required parameters:

- Result to Date (allows you to enter other pertinent details information regarding the result of the organizational goal).
- Results Archived
- Progress (percentage completion)
- Status (pending, critical, behind, on target, completed)

Progress Detail*:		
Progress Date*:	(not specified)	
Progress*:	0% 💌	
Status*:	Pending 👻	

Click the **Add** button to update the organizational goal progress. The updates will be listed on the table.

#### Improve client communications

litle":	Improve cli	ent communications			
Category:	Staff Devel	lopment 💌 🔲 Allow i	nclusion in owner's ap	praisal	
Description:	-				
-					Terroren and
Owner:	-				Q &
Owner:	🗷 Automa	tically update tracking when linked perfor	mance goals' tracking	are updated	0 4
Owner:	Automa Show al	tically update tracking when linked perfor I trackings	mance goals' tracking	are updated.	0 4
Owner: Progress —	<ul><li>✓ Automa</li><li>✓ Show al</li></ul>	itically update tracking when linked perfor I trackings	mance goals' tracking	are updated.	0 9
Owner: Progress + Add	☑ Automa ☑ Show al	itically update tracking when linked perfor I trackings	mance goals' tracking	are updated.	
Owner: Progress + Add	☑ Automa ☑ Show all	itically update tracking when linked perfor I trackings	mance goals' tracking	are updated.	Status
Owner: Progress + Add Event Created	Automa Automa Show al Date Jul 19, 2012	itically update tracking when linked perfor I trackings Who YOUNG Steve	mance goals' tracking Results	Progress	Status Pending

Click the **Save** button to save the updates.

# Setting Email Notification on Changes to Organizational Goals and Sub Organizational Goals

Email notifications are automatically send to the user once a modification is made on the organizational goals or sub-organizational goals. Users who will receive the notification are the following:

- The owner of the organizational goal
- The direct owner of the sub organizational goal
- The owners of the performance goals which are linked to the organizational goal.

To do this. click **Manage Center > System > General Settings > System Configuration**. Select the category "Goals". This shows the Goals setting email configuration.

Email sent to reviewer if reviewee changes his/her performance goal:	An email notification using this email template will be sent to the reviewer when the reviewee changes his/her performance goal. If no email template is selected, a email notification will not be sent to the reviewer when the reviewee changes his/her
	performance goal

Email sent to reviewee if reviewer changes a performance goal of the reviewee:	An email notification using this email template will be sent to the reviewee when the reviewer changes a performance goal of the reviewee. If no email template is selected, a email notification will not be sent to the reviewee when the reviewer changes a performance g oal of the reviewee.
Email sent to owners of goals that are linked to an organizational goal that has been changed:	A notification based on the selected email template will be sent to owners of goals that have been linked to the edited organizational goal. Goal changes that will trigger the notification do not include changes in tracking data and ownership

Once the email configurations has been setup, click the Save button to keep the updates.

# **Goal Programs on Appraisal**

This section discusses on how the goal programs and performance goals can be setup to Appraisal.

## Setting Up Goal Result Section for Appraisal

Performance goals could be added to user appraisal past achievements for reviewing the performance later.

Note: User can define multiple goal sections within the same page.

From the **Structure** tab of the appraisal template, select the page where the goal result will be added. Click the **Gear** icon and then select **Add New Section.** 

Past Achievements 🔶	Create/Edit Page
• • • • • •	Page Title
	testing
Add New Section	Step
Delete this Page	Past Achievements 💌
Sign Off 🗣	
-	🗃 Save , Cance

The screen refreshes and displays *Create/Edit Section* screen. Under the section type, select **Goal Results**.

New Template [Preview]

#### New Template [Preview]

. Past Achievements	•	Create/Edit Section
I 🗈 testing	¢	Put the section to the page You can drag and drop to change its position later
2. Future Planning	¢	testing  Section Type
3. Sign Off	٠	Choose a Type
I 🗈 Sign Off	٠	Choose a Type Free Text Learning Path Training Record
I 📕 Sign Off	٠	Rating Summary Single Choice Past Achievements Competencies
		Appraisal Dimensions

This opens the **Goals Details** screen, which allows you to provide the information such as **Section Title, Section Code, Description, and Visible Statuses**. Apart from this information, this section also allows you to configure the following:

#### **Goal Selection Mode**

The goal selection mode determines how goals will be added to this section:

#### Automatic

- All Selectable Goals will be added automatically.
- Selectable Goals
- If an appraisal template has included Goal Result or Goal Plan sections, it must be activated with a period.
- For performance goal, if its start/target date lies within the template's defined period, it can be selected.
- For organizational goal, in addition to the time constraint (considering the associated goal program's start/end date), it can be selected only if it has "Allow inclusion in owner's appraisal" being turned on.

#### Manual

- Allow to select goals from user's goal list;
- Allow to create/edit performance goals for appraisal because once an appraisal is started, appraisee's goal list will be locked and he will not able create/edit goals even they find some goals missing or incorrect; more about the locking will be discussed in Locking of Goals. Goals created within an appraisal will be included by default.
- Comment/Rating Inputs
- Access for editing
- Allow edit by" defines who can edit the content in this section. Editing would mean updating the comments, ratings, selecting & creating goals.



Administrators can also specify the minimum and maximum number of goals per section. When completing the appraisal, warning messages will be shown at the relevant sections if the number of goals does not meet the configured minimum and maximum and the user will be unable to submit the appraisal.

Note: These settings cannot be modified once appraisals based on the template have been started.

Once completed, click the Save button to keep the record.

#### Creating a Goal Plan in the Appraisal Future Planning

As an Administrator, user could setup a new goal section in user appraisal's Future Planning so that appraisee can create performance goals and add them to the appraisal future planning. The Administrator fills in the title, description and permissions then it is ready for use.

From the **Structure** tab of the appraisal template, select the Future Planning section. Select the page where Goal plan section will be added by clicking the **Tools** icon and then select **Add New Section**.



The screen refreshes and displays *Create/Edit Section* screen appears. Under the section type, select **Goal Plan**.

Manage > Appraisal Templates >

#### New Template [Preview]

∂eneral Workflow Ratings	Structure	Target Audience
1. Past Achievements	\$	Create/Edit Section
I 🗈 testing	¢	Put the section to the page You can drag and drop to change its position later
2. Future Planning	¢	testing  Section Type
🗉 🗈 testing	¢	Choose a Type
3. Sign Off	٠	Free Text Learning Path Training Record
I 🗈 Sign Off	٥	Rating Summary Single Choice Future Objectives
I 📕 Sign Off	•	Goal Plan

This opens the Goals Plan details screen, allowing you to provide the information as stated below:

- Section Title
- Section Code
- Description
- Visible for status
- Allow edit by

Section Title	
Section Code	
S DO CARATO D	
Jescription	
	1

Access Control		
Visible for Statuses ☑ Started		
🔽 Completed		
Allow edit by 🔽 Employee		
📝 Appraiser		
👿 Super-Appraiser		

When complete, click the **Save** button to keep the record.

Once the performance review is executed the learner can create his own performance goal using the future planning part of the appraisal the same as the appraiser can assign personal goal to the learner.

## Adding Existing Goals to Appraisal Future Planning Sections

In Appraisal Future Planning, users can add existing goals to Performance Goal and Development Goal sections with the new "Select goals" button. A new dialog will be shown after clicking the select goals button and users can then add goals to the appraisal by clicking button on the respective "+" button.

Tenomance Obais					
	Target Date		Progress	Category	
Perf goal 1	Jul 31, 2016	Pending	0%		10%
+ Perf goal 2	Jul 31, 2017	Pending	0%		20%
Select goals					
Select goals					
Select goals Development Goals Title	Target Date	Statu	us Pro	ogress	Weight
Select goals Development Goals Title + Dev goal 3	Target Date Aug 31, 2016	State	us Pro ding 0%	ygress	Weight 11%

# **Editing Goals in Appraisal Future Planning Sections**

In Appraisal Future Planning, users can edit goals in Performance Goal and Development Goal sections. Users can click the link on goal title or use the "Edit" option under the gear button. A dialog is shown for the user to edit the contents.

Perf	ormance Goal
+ S	elect goals 📔 🕂 Create goal
8	Perf goal 3
-	Jul 1, 2016 - Jul 31, 2016
	Perf goal 3 description

⊦ Se	elect goals + Create goal	
	Title	
Cedit Rem Rem	ove from this appraisal and permanently delete goal	

### **Deleting Goals while Appraisal in Progress**

Users can delete goals by using the "Remove from this appraisal and permanently delete goal" option under the gear button, available for all goal related section types. If the intention is to keep the goal but remove the goal from the current appraisal/section, the user should select the "Remove from this appraisal" option.

Perf goal 3       Jul 1 2016 - Jul 31 2016       Edit       Remove from this appraisal	- Sel	lect goals + Create goal
Perf goal 3 Jul 1 2016 - Jul 31 2016 Edit Remove from this appraisal		Title
Edit Remove from this appraisal	¢	Perf goal 3
Remove from this appraisal	Edit	
	Remo	ove from this appraisal

To permanently delete a goal, the goal must not be in use in other appraisals.

# **Goal Category**

## **Creating a Category**

On Goal Manager, click the category gear icon and then select Add.

NetDimension	s Talent Suite	Ma	inage Center				📥 SAPLALA Katrina	Logou
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Goal Manage	er							
Goal Programs	• •	a -	O ZCorp Goal Program	2013 (Jan 1, 20	013 - Dec 31, 2013	\$)		
E ZCorp Goal P	rogram 2013	1	+ Add Organizational G	ioal			Filter by Category 🔹	¥ •
Goals 2013			Organizational Goals				Add	
Customer Ser	vice			iffabriegosoller	shaftekanitän		Financial	
ZCorp Goal P	rogram 2012		W O Donaudamprisen	mannsgesensu	панэкарнан		Tinancia	
1 公司目标2012			Decrease cost o	of sales by 15%	6		Financial	
Techanix Goa	als		🔅 💿 Reduce Operatin	ng Costs			Financial	
ZCorp Goal P	rogram 2011		🐴 💿 Minimise Debt				Financial	

The New Goal Category screen appears on the screen. Enter the name of the goal category.

×
Cancel

To save, click the **Save** button.

To check if the new category is saved, click the **Filter by Category** drop down button and see if the category you added is included on the list.

Manage >		
Goal Manager		
Goal Programs + - 🗱	2013 1st Quarter Goal Program (Nov 1, 2012 - No	v 1, 2013)
F 2013 1st Quarter Goal Program	+ Add Organizational Goal	Filter by Category 💌 💌 👻
F ZCorp Goal Program 2012 SY Test Plan 2012	Organizational Goals	Filter by Category
	O Increase sales by 25%	Finance

## **Modifying a Category**

From the **Category** drop down menu, select the category you want to modify. Click the **Gear** icon then select **Edit**.

NetDimensio	ons Talent Suite	Man	age Center				🛔 SAPLALA Katrina	Logo
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Goal Mana	ger							
Goal Programs		a • 0	ZCorp Goal Program	2013 (Jan 1, 20	013 - Dec 31, 2013	3)		
ZCorp Goal	Program 2013		Add Organizational G	Goal			Filter by Category 🔻	*
Goals 2013		0	rganizational Goals				Filter by Category <no category=""></no>	1
Customer S	Program 2012		O Donaudampfsch	iiffahrtsgesellso	:haftskapitän		Financial Internal Process	
■公司目标20	12	4	O Decrease cost o	of sales by 15%	6	L	Learning & Growth	
📕 Mechanix G	Goals		🗘 🗿 Reduce Operation	ng Costs			Financial	
ZCorp Goal	Program 2011		Minimise Debt				Financial	
			C O Efficient Billings				Financial	

The *Edit Goal Category* appears on the screen. Modify the goal category name.

Edit Goal Category	×
Goal Category Name : Sales	
Save	Cancel

Click the **Save** button to keep the changes.

### Removing a Category

From the **Category** drop down list button, select the category you want to remove. Click the **Tools** butt on then select **Delete**.

NetDimension	s Talent Suite	Ma	nage Center				🛔 SAPLALA Katrina	Logout
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Soal Manag	er							
Goal Programs	00		O ZCorp Goal Program	2013 (Jan 1, 20	)13 - Dec 31, 2013	)		
E ZCorp Goal F	orogram 2013		+ Add Organizational G	loal			Internal Process	¢ •
Goals 2013			Organizational Goals				Add	
E Customer Ser	rvice						Edit	
ZCorp Goal P	rogram 2012		Paperless Office				Delete	
上公司目标2012	2		Centralise IT				Delete	
E Mechanix Go	als		Fill Vacant position	5			Internal Process	

The *Delete Goal Category* appears on the screen. Click **Ok** to remove the category otherwise click **Can cel** to cancel the deletion of the goal category.



# **Goal Templates**

Goal template ease the creation of performance and development goals. Users can go to the Goal Template page through the manage center. Upon clicking on the 'Goal Templates' link, a listing page will be shown:

NetDimen	sions Talent Suite	Man	age Center				ADMINISTRATOR System Log
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Goal Te	nplates						
Bulk Action							+ Create Goal Template
	Template Name				Template T	уре	Goal Title
• •	team development go	al template			Developme	nt Goal	
• •	team performance go	al template			Performanc	e Goal	

This page lists all Goal Templates the user has access to

If a user has 'Unrestricted' access to Goal Templates, he can:

- edit the goal template
- delete the goal template
- change the permission of the goal template
- create a new goal template

ñ	NetDimensio	ons Talent Suite	Mana	age Center				ADMINISTRATOR System	Log
	OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
	Goal Tem	plates							
	Bulk Action	•						+ Create Goal Template	
	Ter	nplate Name				Template Ty	уре	Goal Title	
	🗆 🔅 tea	m development goa	al template			Developmer	nt Goal		
	Edit		emplate			Performanc	e Goal		
	Delete	ions							

The User can edit, delete, and edit the permission of goal templates if he has 'Unrestricted' Goal Template access control

However if a user has 'read only' access on goal templates, he can only view the goal template

ñ	NetDimensio	ns Talent Suite	Ma	nage Center				
	OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
	Goal Temp	lates						
	Template	Name				Template Typ	e	Goal 1
	team deve	elopment goal tem	plate			Development	Goal	
	View	em	plate			Performance (	Goal	

User can only view goal templates if he has 'Read' Goal Template access control

Clicking on 'Create Goal Template' will direct user to a new create goal template page

	ns talent suite	Wall	age Genter				ADMINISTRATOR System	Logo
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Goal Templates								
New Goal	Template							
TEMPLAT	E PROPERTIES							
Template Nar	ne*							
Required								
Template Typ	e ce Goal							
Developme	nt Goal							
DETAILS								
Title								
Weight	%							
Description (f	Aaximum 2000 cha	racters)						
Start Date			- 3/2/27					
Start on a	specific date (not	specified)	- 🚍 🧈					
Jate of As	signment							
Target Date		10 10						
<ul> <li>Target on a</li> <li>Target</li> </ul>	Day(s)	<ul> <li>from star</li> </ul>	t date					
Measurement	and Milestones							

Goal Templates support all goal properties. But please note that:

# 1. User can choose between creating a goal template for 'Performance goal' and 'Development Goal'.

If a goal template is for 'Performance goal', the 'Linked Organizational Goal' section will be displayed

Required	
Template Type Performance Goal	
Development Goal	

Link Goal     K     Unlink Goal	

Linked Organizational Goal' section will appear if 'Performance goal' template type is selected

If a goal template is for 'Development Goal', the 'Linked Learning Requirement' section will be displayed

Required	
Template Type	
Performance Goal     Prevaluement Goal	
C Development Goar	
DETAILS	
Title	
Weight	
%	
Description (Maximum 2000 characters)	
Oher Date	
Start on a specific date (not specified)	
Date of Assignment	
Terest Data	
Target on a specific date (not specified)	
Tarnet     Dav(e)     From start date	
Barger Daylsy · Internationate	
Measurement and Milestones	
	4
	]
LINKED LEARNING REQUIREMENT	
Link Learning Module	
NOTIFICATION SETTINGS	
Completion Reminders	

'Linked Learning Requirement' section will appear if 'Development Goal' template type is selected

# 2.'Start date' and 'Target date' are configurable

Start Date		
Start on a specific date	(not specified)	
Date of Assignment		
20000000000000000000000000000000000000		
Target Date		
Target Date Target on a specific date	e (not specified)	1
The actual date will be calculated once the template is applied.

# **Permissions of Goal Templates**

Permission can be set for each goal template

Bulk	Action •			+ Create Goal Template	
	Template Name		Template Type	Goal Title	
	team development goal	template	Development Goal		
	Edit	emplate	Performance Goal		
	Delete				

#### Set permission for each goal template

'Write' permission means user can edit/delete the goal template

DUIK	Action •			+ Create Goal Template
	Template Name		Template Type	Goal Title
	team development goa	al template	Development Goal	
	Edit	emplate	Performance Goal	
	Delete			

#### Available actions for 'Write' permission

'Read' permission means user can only view the goal template

Sulk Action 🔻		+ Create Goal Template
A team performance and template	Performance Goal	

#### Available actions for 'Read' permission

In terms of using the goal template to create goals, 'Read' only access will be suffice.

#### Apply Goal Templates when Assigning Goals

Goals can be generically assigned to employees on a regular basis. To simplify the goal setup procedure, a Goal Template is being introduced.

When assigning a goal to users, assigner is allowed to apply a Goal Template which:

- Takes Start Date depending on whether it is "Fixed" or today
- Calculates a target date if assignment specifies "X Time From Start Date"

Select goal section will only appear when creating new goals in the following areas:

- My Goals
- Review CDC

• Appraisal: performance goal result, performance goal plan, development goal plan

My Goals:

# New Performance Goal

ormance Goal 3	*
ormance Goal 3	5
ormance Goal Template 2 ormance Goal Template 1	Prformance Goal 3 Prformance Goal Template 2 Prformance Goal Template 1

Performance Goal Template selector on My Goals

# New Development Goal

o velopment Goal Template 1 evelopment Goal Template 2 evelopment Goal 3	o  velopment Goal Template 1 evelopment Goal 3 DETAILS	you want to use goal template?	e?
o evelopment Goal Template 1 evelopment Goal Template 2 evelopment Goal 3	lo Jevelopment Goal Template 1 Jevelopment Goal Template 2 Jevelopment Goal 3 DETAIL S	No 🔻	•
evelopment Goal Template 1 evelopment Goal Template 2 evelopment Goal 3	evelopment Goal Template 1 levelopment Goal Template 2 levelopment Goal 3 DETAILS	No	
	DETAILS	Development Goal Template 1 Development Goal Template 2 Development Goal 3	
e*		Required	

Development Goal Template selector on My Goals

# Review CDC:

	Name	Job Profiles
	CrgGroup2	A Job Profile1
	Review Employee Profile	▲ Job Profile1 ▲ Job Profile2
	Review Learning Center	
- 1	Review Career Center	
- 1	Deploy Assessment	
-0	Assign Performance Goal	1
Show	Assign Development Goal	

Assign Goal To a user on Review CDC

Appraisal: performance goal result, performance goal plan, development goal plan

	Ð	2. Sign Off
reate goal		×
GOAL TEMPLATE		<b>^</b>
Do you want to use goa	template?	
No		
Performance Goal 3 Performance Goal Ter Performance Goal Ter DETAIL S	plate 2 plate 1	
Title"		
Title* Required		
Title* Required Weight*		

Performance Goal Template selector on Appraisal-Goal Result

Note that the Default is not using any templates.

# License Checking on Goal Templates

Development Goals Templates are available on Learning licenses. Performance Goal Templates however, are disabled for non-Performance licenses. Goal-related system configuration options are available for Learning licenses (provided that organizational goals have not been changed). For Performance license, users can create, edit and see both Performance and Development Goal templates.

OVE	RVIE	W LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Goa	al Te	emplates						
Bull	k Actio	on 🔻						+ Create Goal Template
-		Template Name		Temp	late Type	Goa	l Title	
	٥	Development Goal 3		Devel	opment Goal	Deve	elopment Goal 3	
	٥	Development Goal Ter	mplate 1	Devel	opment Goal	Deve	elopment Goal Ter	mplate 1
	٥	Development Goal Ter	mplate 2	Devel	opment Goal	Deve	alopment Goal 2	
	٥	Performance Goal 3		Perfor	rmance Goal	Perf	ormance Goal 3	
	٥	Performance Goal Ter	mplate 1	Perfor	rmance Goal	Perf	ormance Goal Ter	nplate 1
	٥	Performance Goal Ter	mplate 2	Perfor	rmance Goal	Perf	ormance Goal 2	

Goal Templates listing page for Performance license

OVERVIE	W	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Goal Temp	ates >							
New G	oal T	emplate						
TEM	PLATE	PROPERTIES						
Templa	e Nam	e*						
Requir	bed							
Templa Perfo	e Type	Goal						
O Deve	opmen	t Goal						

Create/Edit Goal Template page for Performance license

For Learning license, users can create, edit and see only Development Goal templates.

Ne	etDime	nsions Talent Suite	Man	age Center			📥 ADI	MINISTRATOR System	Logou
OVE	ERVIEV	V LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Goa	al Te	mplates							
Bul	ilk Actio	n 🔻						+ Create Goal Te	molata
								and the second	mpiare
		Template Name		Templ	ate Type	Goal	Title		mpiace
	0	Template Name Development Goal 3		Templ	ate Type opment Goal	Goal Deve	Title lopment Goal 3		inplace
	0	Template Name Development Goal 3 Development Goal Ter	mplate 1	Tempi Develo Develo	ate Type opment Goal opment Goal	Goal Deve Deve	Title Iopment Goal 3 Iopment Goal Te	mplate 1	mpare

Goal Templates listing page for Learning license

OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Goal Templates >							
New Goal	Template						
TEMPLAT	TE PROPERTIES						
Template Nan	ne*						
Required							
Template Type	e Goal						
Developme	nt Goal						

Create/Edit Goal Template page for Learning license.

# Locking of Goals

Personal Goals of a learner is locked (disallow creation, update & deletion of goals) once the learner has an appraisal in progress. Moreover, goals are not allowed to be deleted if it has been associated with any existing or past appraisal. Locking of goals ensures appraisal can always capture accurate goal result information; otherwise, goals may be changed during appraisal and the participants may not be reviewing the same matter, this violates the purpose of appraisal.

Personal Goals Organizational Goal	s			
Editing of goals has been locked as an app	raisal with goals is in progress. Any chan	ges should be made from within the appra	iisal.	
Title	Target Date	▲ Link To	Weight	\$
Get good engineers	Mar 29, 2013	Acquire related personel	100%	0
1y Goals				
Personal Goals Organizational Goal	s			_
Personal Goals Organizational Goal Editing of goals has been locked as an appr	s raisal with goals is in progress. Any chang	ges should be made from within the appra	isal	
Personal Goals Organizational Goal Editing of goals has been locked as an appr Title	s raisal with goals is in progress. Any chang A Goal Program	ges should be made from within the appra	iisaL ♦ Status	\$

However, the locking does not apply inside an appraisal and user can create/edit his performance goals or add progress tracking records for organizational goals. This is allowed because there may be situations user needs minor changes on his goals or even adding a new goal to better reflect his past achievement. This does not conflict with the locking on the goal list because ultimately, the locking mechanism is to ensure users would be aware of goal changes during appraisal.

# **Completion Reminders for Goals**

Completion reminders for goals have been added in both Performance Goals and Development Goals input page. Users can now configure completion reminders for goal owner or owner's direct appraiser.

	Talent Suite	
ŀ	e Learning Center Career Center Workspace Connect Reports Teach	
ſ		
	earn Java	
	st Modified by: System Administrator on: Jan 30, 2014	
	DETAILS	
	Title*	
	Level meet	
	Louin vova	
	Weight	
	Weight* 100 %	$\sim$
	Weigh* 100 %	~
~~~	Weight* 100 % NOTIFICATION SETTINGS	~
~~~	Weight* 100 % NOTIFICATION SETTINGS Completion Reminders	~
~~~	Weight* 100 % NOTIFICATION SETTINGS Completion Reminders Send completion reminder to Owner day(s) before Target Date	~
~~~	Weight* 100 % NOTIFICATION SETTINGS Completion Reminders Send completion reminder Once to Owner day(s) before Target Date Send completion reminder Once to Owner's Direct Appraiser day(s) before Target Date	~

Once the reminder is enabled, notifications will be sent to the target recipients on daily basis until goal is closed.

NOTIFICATION SETTING	S			
Completion Reminders Send completion reminder	Once	to Owner day(s) bef	ore Target Date	
Send completion reminder	Once Daily Weekly Every 2 Weeks Monthly	to Owner's Direct Appraiser	day(s) before Target Date	

User can now configure email templates for goal assignment notification or goal completion reminders in System Configuration.

System Configu	uration					
Select a specific configur Save, the current custom	ration category from the drop-down menu below. nization properties file is updated.	Subsequent screens allow you to e	dit the properties associated with the sel	ected category. When	you clic	k
Select a category						
Goals	•					
You must save all cha Goals	anges. Before Selecting another category.					
Goal Assigned Notificati Completion Reminder to	ion to Goal Owner E-mail Template: Goal Owner E-mail Template:	~~~~~~	~~~~~~		10.0	***
Completion Reminder to						

# **Goal Assignment Notification**

Goals can be assigned to a user via various means, assignment notification is needed or else a user may not be aware that new goals have been created and assigned to the user to complete. The notification can be configured from the System Configuration screen (as shown above).

Notification may be triggered when:

- 1. an appraiser assigns a performance/development goal to an appraisee
- 2. a reviewer assigns a performance/development goal to a reviewee in the appraisal
- 3. a manager assigns an organization goal to an employee, or changes the goal owner to someone else
- 4. a manager clones a goal program which has organization goals underneath

* 014 🔚 🧷	
e*	
014 🔚 🧷	Confirmation X
ent and Milestones	Do you want to send goal assignment notification?
əd :ified) 📑 🧷	

When there is a notification warranted situation, the assigning person will be prompted to confirm if notification should be sent.

Goal related e-mail parameters include:

- Development Goal Linked Learning Requirement
- Goal Description
- Goal Latest Progress
- Goal Measurement and Milestones
- Goal Start Date
- Goal Target Date
- Goal Title
- Goal Type
- Goal Weight
- Linked Goal Program Name
- Linked Organizational Goal Title

# Linking Modules to Development Goals

A development goal can be configured to require taking a course in the system, so it would be easier to manage such a requirement by specifying it in the goal setup. There is a "Linked Learning Requirement" section on the setup page to handle this which has the option to link or unlink a learning module.

(not specified) Second	Date Closed	
LINKED LEARNING REQUIREMENT	(not specified)	
LINKED LEARNING REQUIREMENT		
LINKED LEARNING REQUIREMENT		
AICC Flash Workshop - PPT to web examples (123456)		
AICC Flash Workshop - PPT to web examples (123456)	LINKED LEARN	NG REQUIREMENT
	LINKED LEARN	NG REQUIREMENT
	AICC Flash Wo	NG REQUIREMENT

When the linked learning requirement has been achieved after the goal start date, a 100% progress record with a completed status will be automatically added to the goal. Once the auto 100% progress record has been added, the linked course, the progress percentage and the status cannot be changed. Any subsequent insertion of progress update records will have these fields populated with values taken from the last auto 100% progress message.

+ Add	1				
Event	Date	Who	Results	Progress	Status
Jpdated	Jan 16, 2014	ADMINISTRATOR System (ndadmin)	Linked learning requirement complete: Online1 (MOD-0000)	100%	Completed
Created	Jan 16, 2014	ADMINISTRATOR System (ndadmin)		0%	Pending
Updated	Jan 7, 2014	ADMINISTRATOR System (ndadmin)	ikl	5%	Completed

Note: Deletion of learning module would delete links in development goals.

# **Performance** Appraisals

(available for Performance only)

# **Configurable Appraisal Forms**

A template consists of three parts:

- Past Achievements
- Future Objectives
- Sign Off

Each part has a number of pages and each page is built up from one or more sections. A section can be one of the following types:

- Free Text
- Learning Path
- Training record
- Rating Summary
- Single Choice
- Past Achievements
- Competencies
- Appraisal Dimensions
- Goal Results
- Future Objectives
- Career Development
- Goal Plan

An appraisal template can have one of two statuses:

- Active means any user starting a new appraisal will be presented with a form based on this template. Only one template can be active at any point in time activating a particular template will automatically cause the other templates to be set to inactive.
- Inactive means that the template exists but will not be used by users currently starting new appraisals. Templates with this status will typically be one of the following:
- 1. Templates that are currently being configured and not yet ready for use
- 2. Templates that were previously active and have users' appraisals associated with them

Each time a user starts a new appraisal, the system will generate an appraisal form based on the template that is active at the instant the user starts the appraisal. The appraisal will then be tied to that template and will remain the same thereafter even if a different appraisal template is activated. As such, only templates with '0' as No. of Appraisals can be deleted.

To create new Appraisal Templates: Click Manage Center > Talent > Appraisal Manager >

# Templates. then Create Template.

ppraisal Manager								
Templat	es Appraisal Status	Category Gro	up Email	Appraisal Search				
Bulk Action 💌 + Create Template								
	Competencies	Active	Annual	2	Jan 29, 2013 10:32 AM	ADMINISTRATOR System		
	Steve Young	Inactive	Annual	0	Jan 15, 2013 5:55 PM	YOUNG Steve		
	Default Template	Active	Annual	0	Jan 11, 2013 3:20 PM	ADMINISTRATOR System		

This leads you directly to *Details* page. Admin can select who will be the super-appraiser in the appraisal. By default, it is set to the Direct Appraiser of the Direct Appraiser:

The local fill and first first	w Ratings	Structure	Target Audience				
General	Raungs	Sudctore	raiget Autorice				
mplate Name*							
014 Appraisal Ter	mplate						
eriod Start Date							
an 1,2014							
ariod End Date	-						
Jec 31, 2014							
ppraisal Type							
Midyear							
Project							
emplate Status							
Inactive Active							
Active							
Inactive Active In starting an appra	isal, automatic	ally set Super	-Appraiser to be				
) Inactive ( Active In starting an appra ( The Direct Appraise ) Specific Appraise	isal, automatic ser of the Direc r	ally set Super t Appraiser	-Appraiser to be				
) Inactive Active In starting an appra The Direct Appraise Specific Appraise	isal, automatic ser of the Direc r	ally set Super t Appraiser	Appraiser to be				
) Inactive Active In starting an appra The Direct Appraise Search for a une ccess to appraisal	isal, automatic ser of the Direc r	ally set Super t Appraiser	Appraiser to be				
Inactive Active Instarting an appra The Direct Appraise Specific Appraise Starch for a une cess to appraisal ction	isal, automatic ser of the Direc r	ally set Super t Appraiser	Appraiser to be	Employee	Appraiser	Super-Appraiser	
Inactive Active starting an appra- The Direct Appraise Specific Appraise Search for a use ccess to appraisal ccion reate appraisal	isal, automatic ser of the Direc r	ally set Super-	-Appraiser to be	Employee V	Appraiser	Super-Appraiser	
Inactive Active In starting an appra The Direct Appraise Search for a one ccess to appraisal terion Preate appraisal Change appraiser	isal, automatic ser of the Direc r	ally set Super	Appraiser to be	Employee V	Appraiser 27	Super-Appraiser	

# Anatomy of an Appraisal Template

A template will have the following parts:

- Past Achievements Part
  - Future Planning Part
  - Sign Off Part

	Section Type	Past Achievements	Future Planning	Sign Off
1	Career Development	×	0	×
2	Free Text	•	0	0
3	Future Objectives	×	0	×
4	Learning Path	•	•	0

5	Past Achievements	•	×	×
6	Competencies	•	×	×
7	Rating Summary	•	0	0
8	Appraisal Dimension	•	×	×
9	Single Choice	•	0	0
10	Training Record	•	0	0
11	Goal Result	•	×	×
12	Goal Plan	×	0	×

# **Appraisal Flows**

A template will take one of two flows:

- "Basic": Started Completed
- "Complex": Started Pending Review Agreed Completed

"Basic" Flow Action	"Complex" Flow Action	Resulting User Appraisal Status
Starting a new appraisal	Starting a new appraisal	Started
n/a	Appraisee submits appraisal	Pending
n/a	Appraiser submits appraisal	Review
n/a	Appraisee submits appraisal	Agreed
Appraiser submits appraisal	Appraisal submits appraisal	Completed

# **Configuring General Properties of an Appraisal Template**

To configure the general properties, click either the name of the template you wish to configure or click the **Gear** icon and then select **Edit**.

Аррг	Appraisal Manager									
Temp	lates Appraisal Status Ca	tegory Grou	ıp Email	Appraisal Search						
Bulk	Action 💌					+ Create Template				
	Template Name	Status	Type	No. of Appraisals	Created On	Created By				
	New Template	Inactive	Annual	0	Jan 31, 2013 4:24 PM	MOLINA Alon				
	Edit	Active	Annual	2	Jan 29, 2013 10:32 AM	ADMINISTRATOR System				
	Activate	Inactive	Annual	0	Jan 15, 2013 5:55 PM	YOUNG Steve				
	Uerauit remprate	Active	Annual	0	Jan 11, 2013 3:20 PM	ADMINISTRATOR System				

The Appraisal Template Editor screen opens in a new window.

	Θ
	-
Appraiser	Super-Appraiser
	Appraiser

🛢 Save

Once completed, click the **Save** button keep the changes.

**Note #1:** You can use the breadcrumbs located at the right top part of the *Appraisal Templates* screen to navigate from the previous screens.

On the general details of the appraisal template enter the following information:

- Template Name e.g. 2012 Annual Appraisal
- Period Start Date This is the Appraisal Period Start Date
- Period End Date This is the appraisal Period End Date

(Appraisal Period Start and End dates are mandatory for appraisals which use Goal Results or Goal Planning sections.)

**Note#2:** The appraisal period is mandatory for templates with Goal Results sections and only goals that fall within this appraisal period are eligible for inclusion in the appraisal.

- Appraisal Type Describes the purpose of the template:
- Annual For appraisals running for a full year
- Mid-Year For appraisals covering part of the year
- For project based appraisals
- Template Status Indicates the status of the template. This allows you to select from the following:
- Inactive Indicates that the template is inactive and not available when creating a new appraisal for an appraisee.
- Active Indicates that template is active and available when creating a new appraisal for an appraisee.
- Access to Appraisal Defines the permissions given to various participants within the appraisal process, e.g.
- Employee the user who is being reviewed
- Appraiser the reviewer who is, by default, the employee's Direct Appraiser
- Super-Appraiser an optional participant who is, by default, the Direct Appraiser of the employee's Direct Appraiser

**Note#3**:Click Preview to see what the template would look like to a user. This can be opened at any point in the configuration process. The preview is Read Only and would not contain any user specific information such as training records.

# **Configurable Appraisal Workflow**

The appraisal process will differ across organizations and perhaps even across different departments of the same organization. This enhancement will allow each template to configure its own workflow thus catering for a wider range of appraisal processes.

# The Default Workflow

When a template is created it will have a two status workflow by default, namely:

STARTED, editable by Appraisee/Appraiser

Default Template [Preview]

se All + Create S	Statu
rted	
	50
Text to Display to User on Submission @	
num 15 characters) appraisal.text.submitReview.B&SIC.ST&RTED	
E-mails to Send on Submission @	
ed 💌 1. Select	
Description	
ed Require Signature @	
s Control 😡	
oyee Appraiser Super-Appraiser	
Access O No Access O No Access	
ew Oview View nform Perform Perform	

• COMPLETED, viewable by Appraisee/Appraiser

nd Mandatory)			
0		1. Select 2: Select ■ Require Signature ©	
Appraiser	Super-Appraiser		
<ul> <li>No Access</li> <li>View</li> <li>Perform</li> </ul>	● No Access ○ View ○ Perform		
nd Mandatory)			
cters)			
0			
Appraiser	Super-Appraiser		
	Appraiser No Access View Perform  Mandatory)	Appraiser Super-Appraiser          No Access       No Access         View       View         Perform       Perform	1. Select 2. Select Require Signature @ Appraiser Super-Appraiser No Access No Access View Perform Perform d Mandatory) cters)

The two statuses can be modified and additional statuses can be added but the workflow must always maintain a minimum of two statuses. A new appraisal will always take on the first status in the workflow and each "submit" will move the appraisal on to the next status in the workflow. Submissions will be allowed until the appraisal reaches the last status, when it is no longer considered "current" and will be listed under "Past Reviews ...". Once appraisals exist for the given template, you will not be able to add or delete statuses though the configurable properties for existing statuses can still be changed.

Property	Allowed Values	Usage
Code	Any String (Max 15 characters)	A mandatory identifier for the status - the system will not enforce uniqueness but making codes unique within the workflow is recommended for user clarity.
Category	Any of the configured Appraisal Status Categories	For reporting purposes - now that statuses are specific to individual templates, this property will tie similar statuses between different templates together making it possible to report on all appraisals, regardless of the appraisal template, with statuses that are in a particular status category.
Status Description	The label or the label key corresponding to the translated label in the language properties files. (Max 100 characters)	For displaying the status to the user in NetDimensions Performance screens. If the site does not support multiple languages, the label can be entered directly into the text field. If the site does support multiple languages, the label key should be entered and a matching entry should be placed in the relevant custom.properties language files. If this field is left blank, the status code will be used when displaying to users.
Access Control	Appraisee / Appraiser / Super-Appraiser	To specify who can edit the appraisal when it is in this state.
Viewer(s)	Appraisee / Appraiser / Super-AppraiserAny String (Max 2000 characters)	To specify who can view the appraisal when it is in this state.
Text to Display to User on Submission	Any String (Max 2000 characters)	To convey information to the performer before submission e.g. "On submission of this appraisal, you are responsible for organizing a 1-2-1 meeting with your manager to discuss your performance". For multilingual sites, the label key can be entered here and the system will look up the appropriate text to display from the custom.properties language files.
E-mails Templates to Send on Submission	Up to two e-mail templates	The specified e-mail templates will automatically be sent when the appraisal is submitted i.e. moves onto the next status in the workflow. See E-mail Template Editor for Appraisal E-mails for more information.
Require Signature	Sign Enabled / Disabled	If enabled, the system will prompt the performer for an e-signature (consisting of the user's user ID and password) on submission. If disabled, the user can simply click "Submit" to submit the appraisal. See Signature and Circulation Records on Sign-Off Page for more information.

# **Configurable Properties of an Appraisal Status**

Click the **Save** button to keep the configuration settings.

Note: If the new template requires a new status, apart from default statuses, which are the Started and

#### Completed, you can also create a new status by clicking the Create Status.

Default Template [Preview]	
General Workflow Ratings Structure Target Audience	
Workflow Status	0
	+ Create Status
I ▼ Started	۰
Code* 😡	Text to Display to User on Submission @
(maximum 15 characters)	appraisal.text.submitReview.BASIC.STARTED

# **Configuring Rating Scale**

Involving a rating scale is optional in Past Achievements sections but mandatory in Past Competencies sections. The Ratings tab in the Appraisal Template Editor allows you to configure any number of rating scales for the appraisal and each scale can be used by any number of sections in the template.

Appraisal Templates >				
New Template [Preview]				
General Workflow Ratings	Structure Target Audience	9		
Rating Scales Overview				0
Bulk Action 💌				+ Create Rating Scale
Rating Scale Name	Rating	Description Key	Explanation Key	Display Format
There are no items to display.				
Overall Rating Overview				Θ
Bulk Action 💌				+ Create Overall Rating
Title Key*	Description Key*		From Value*	To Value*
There are no items to display.				

By default, you can create a rating scale for Rating Scales Overview and Overall Rating Overview.

# **Creating New Rating Scales**

To create a new rating scale overview, on the **Appraisal Templates**, click **Ratings** and then **Create Rating Scale** button.

Appraisal Templates >					
New Template [Preview]					
General Workflow Ratings	Structure	Target Audience			
Rating Scales Overview					0
Bulk Action 💌					+ Create Rating Scale
Rating Scale Name		Rating	Description Key	Explanation Key	Display Format
There are no items to display.					
Overall Rating Overview					0
Bulk Action 💌					+ Create Overall Rating
Title Key*	Descrip			From Value*	To Value*
There are no items to display.					

The Rating Scale editor appears on the screen.

Appraisal Templates >					
New Template	(Preview)				
General Workflow	Ratings Structure	Target Audience			
Rating Scale Overview :					0
Rating Scale					U
Name*					
Required					
Display Format ©lcons ©Drop down selector					
Ratings					
Bulk Action 💌					+ Create New Rating
Rating*	Description Key*			Explanation Key	
0	Required				
Access Control					
Status	Employee Rating		Appraiser Rating		Agreed Rating
Started	۲		0		0

🖪 Save 🗖 🕈 Back

The Rating Scale editor requires you to enter the following parameters:

- Rating Scale Name
- Display Format: Allows you to select on how the rating scale will be displayed. Currently there are two options are available: Icons and Drop down selector.
- Rating: refers to the rating scale which may vary from 1 to 5 or 1 to 4.
- Description Key: refers to the short description of the rating scale. Resource bundle may be specified.
- Explanation Key: Allows you to provide additional information or instruction regarding the rating scale.
- Access Control. Allows you to provide access control to rating scale.

Note: To add a new rating, click the Create New Rating. A new row is added for the new rating.

Ratings

Bul	k Action 💌			+ Create New Rating
	Rating	Description K ey	Explanation Key	
	0	Required		
	0	Required		

Click the **Save** button to keep the newly added rating scales and returns to *Rating Scale* main editor with the newly created Rating Scales. The new rating scale will be added on the list.

ing s	Scales Overview				
Bulk Ad	ction 💌				+ Create Rating
	Rating Scale Name	Rating	Description Key	Explanation Key	
-	Dating 1	1	Sample Description	Sample Description	loane
	- Rating i	2	Sample Description	Sample Description	100115
erall	Rating Overview				
Bulk Ac	ction 💌				+ Create Overall
- 16	Title Key*	Description Kov*		From Value*	To Value*

# **Editing a Rating Scales**

To edit a rating scale, on the **Ratings** tab, under the list of Rating Scales Overview, click the **Rating Scale Name** or click the **Tools** icon and the select **Edit**.

Appraisal Templates >				
New Template [Preview]				
General Workflow Ratings S	Structure Target Au	dience		
Rating Scales Overview				Θ
Bulk Action 💌				+ Create Rating Scale
Rating Scale Name	Rating	Description Key	Explanation Key	Display Format
E Dating 1	1	Sample Description	Sample Description	loope
Edit	2	Sample Description	Sample Description	ICONS
Overal Delete				Θ
Bulk Action				+ Create Overall Rating
Title Key*	Description Key*		From Value*	To Value*
There are no items to display.				de la companya de la

This leads you to *Rating Editor* screen. Start modifying the details and then click the **Save** button to keep the updates. To cancel the modification, click the **Back** button to return from the previous screen.

# Removing a Rating Scales

There are two ways to remove a rating scale. You can either delete a rating scale individually or delete a rating scale in bulk.

#### To remove a single rating scale:

Click the Gear icon of the rating scale and then click Edit

lanage :	Appraisal Templates >				
lew 1	emplate (Preview)				
and the second			a set of the set of th		
General	Workflow Ratings Struc	ture Target Au	udience		
General	Workflow Ratings Struc	ture Target Au	Jalence		
General	Workflow Ratings Struc	ture Target Au	Jaience		
Genera tating Bulk A	Workflow Ratings Struc Scales Overview	ture Target Au	Jalence		+ Create Rating Scal
General ating Bulk A	Workflow Ratings Struc Scales Overview ction  Rating Scale Name	Rating	Description Key	Explanation Key	+ Create Rating Scal
General	Workflow Ratings Struc Scales Overview Ction Rating Scale Name	Rating	Description Key Sample description	Explanation Key Sample description	+ Create Rating Scal

or Tick the box of the rating scale you want to remove and then select the **Delete** action under the **Bulk Action** drop down button.

Ratir	ng Scales O	verview				
Bul	k Action 💌					+ Create Rating Scale
Del	ete ^{tin}	g Scale Name	Rating	Description Key	Explanation Key	Display Format
	A 0	1	Sample 2	Sample 2	1	
V	🕈 Oamp	ne z	2	Sample 2	Sample 2	icons
6651	A Datia	-1	1	Sample description	Sample description	10000
100	¥ Rauni	87	2	Sample description	Sample description	Icons

### To remove rating scale in Bulk:

Tick all the rating scales or the scales you want to remove and then select the **Delete** action under the **Bulk Action** drop down button.

Bulk	Action 💌				+ Create Rating Scale
Bulk Delet	Action te ting Scale Name	Rating	Description Key	Explanation Key	Display Format
7		1	Sample 2	Sample 2	10000
	₩ Sample 2	2	Sample 2	Sample 2	icons
ก	A Datinat	1	Sample description	Sample description	YESTE
	raungi	2	Sample description	Sample description	Icons

# **Creating Overall Rating**

Sections that involve rating scales can be configured to display the average rating as a summary. The system will calculate the average rating for the specified set of ratings e.g. Appraiser Rating. The degree of precision will depend on the values entered in the template's Overall Rating, please see the examples below.

Suppose a six point rating scale, a three point summary, and a desired precision of one decimal place. The possible values for the average will be 1.0, 1.1, 1.2, ..., 5.9, 6.0, and thus the overall rating statements could then be configured as follows:

To create an Overall Rating, on the **Appraisal Template Editor**, click **Ratings** tab and then **Create Overall Rating** button.

Appraisal Templates >				
New Template [Preview]				
General Workflow Ratings	Structure Target Au	dience		
ating Scales Overview				
Bulk Action				+ Create Rating Scale
Rating Scale Name	Rating	Description Key	Explanation Key	Display Format
Deting 1	1	Sample Description	Sample Description	laano
Rating 1	2	Sample Description	Sample Description	icons
verall Rating Overview				G
Bulk Action				+ Create Overall Rating
Title Key*	Description Key*		From Value*	To Value*
There are no items to display.				

New blank parameters are displayed for creating the Overall Rating. Enter the required parameters.

lew Template (Preview	1					
General Workflow Rating	gs Structure Ta	rget Audie	nce			
ating Scales Overview						
Bulk Action						+ Create Rating S
Rating Scale Nan	ne Ra	ting		Explanation I		Display Format
Rating 1	1		Sample Description	Sample Desc	cription	loone
	2		Sample Description	Sample Desc	cription	icons
verall Rating Overview						
Bulk Action						+ Create Overall R
Title Key*		Descript	ion Key*		From Value*	To Value*
Required		Require	d		0	0

Click the **Save** button to keep the settings.

# **Editing an Overall Rating**

To edit an Overall Rating, on the **Ratings** tab, under the list of Overall Rating Overview, click the **Title Key** or click the **Tools** icon and the select **Quick Edit**.

Bulk Action 💌			Create Overall Ratin
Bulk Action Quick Edit	Description Key	From Value	To Value
Delete	Sample	1.00	2.50
2	Sample	2.51	4.00

Start modifying the details and then click the **Save** button to keep the updates. To cancel the modification, click **Reset.** 

# **Removing Overall Rating**

There are two ways to remove an Overall Rating. You can either delete an Overall Rating individually or delete a rating scale in bulk.

#### To remove a single overall rating:

Tick only the overall rating you want to remove and then select the **Delete** action under the **Bulk Action** drop down button.

Bulk Action 💌		•	Create Overall Ratin
Bulk Action Quick Edit	Description Key	From Value	To Value
Delete	Sample	1.00	2.50
1 2	Sample	2.51	4.00

### To remove rating scale in Bulk:

Tick all the rating scales or the scales you want to remove and then select the **Delete** action under the **Bulk Action** drop down button.

0

#### **Overall Rating Overview**

Bulk Action Quick Edit	Description Key	From Value	To Value
Delete	Sample	1.00	2.50
2	Sample	2.51	4.00

# **Calculation of Appraisal Overall Rating**

Calculation of an appraisal's overall rating will assume the following formula:

SUM(section averages) / Number of sections

The calculation will yield the same result no matter how the sections are grouped in different pages.

past 2 rating summary				
past 2 rating summary description				
Page Title	Section Title	Rating		
	Objective	3.0		
past 1:	past Competencies	2.0		
	past 1 dimension	3.0		
past 2	past Competencies 2	3.0		
Overall Rating: 2.75				
myOverallRating				

Section averages are shown alongside section titles

# **Configuring Appraisal Structure**

This section shows you the basic procedure in adding pages and sections for **Past Achievements**, **Fut ure Planning**, or **Sign Off** tabs.

The appraisal template has the following structure:

#### 1. Step

Step 1 and Step 2 can be turned off by selecting "Hide in Appraisal". The "Sign Off" step is required and cannot be turned off. A Step consists of one or more pages.

# 2. Page

Pages are seen as tabs in the appraisal with the page title as the tab label. A Page consists of one or more sections.

#### 3. Section

Varieties of section types are available to capture different kinds of appraisal data. Choose the section type you want and customize the title and details.

1	▶ 2	▶ 3	
	2		_

To configure appraisal structure, on the Appraisal Template page, select the structure tab.



By default, the page displays the three steps in creating the appraisal templates, which are the following:

- Past Achievements
- Future Planning
- Sign Off

All steps has the functionalities to add add a new page, rename the step, and hide the step in the appraisal **EXCEPT** for the **Sign Off** step wherein it can ONLY add a new page.

# **Renaming the Step**

To rename a step, under the **Structure** tab, click the **Tool** icon of the the step you want to rename and then select the **Rename this Step**.

Manage > Appraisal Templates >

New Template [Preview]

General Workflow Ratings	Structure	Target Audience
1. Past Achievements	•	+ Add New Page + Add New Section
Add New Pag 2. Future Plann Rename this Hide in Appra 3. Sign Off	ge Step aisal	A Step Step 1 and Step 2 can be turned off by selecting "Hide in Appraisal". The "Sign Off" step is required and cannot be turned off. A Step consists of one or more pages.
I D Sign Off	٥	Page Page Pages are seens as tabs in the appraisal with the page title as the tab label. A Page consists of one or more sections.
∦ ■ Sign Off	٠	A Section A variety of section types are available to capture different kinds of appraisal data. Choose the section type you want and customize the title and details.

The screen refreshes and displays the *Edit Steps* screen. Rename the steps by modifying the name inside the **Title** field.



Click the Save button to keep the changes or click the Cancel button to ignore the changes.

# Hiding the Step in Appraisal

To hide the step in appraisal, under the **Structure** tab, click the **Tools** icon of the the step you want to hide and then select **Hide in Appraisal**.

Manage > Appraisal Templates >	
New Template Preview	

General Workflow Ratings Structure	Target Audience
1. Past Achievements	+ Add New Page + Add New Section
Add New Page 2. Future Plann Rename this Step	A Step Step 1 and Step 2 can be turned off by selecting "Hide in Appraisa". The "Sign Off" step is
3. Sign Off	required and cannot be turned off. A Step consists of one or more pages.
	A Page
I 🗈 Sign Off 🛛 💠	Pages are seens as tabs in the appraisal with the page title as the tab label. A Page consists o one or more sections.
I Sian Off	A Section
	A variety of section types are available to capture different kinds of appraisal data. Choose the section type you want and customize the title and datails.

The screen refreshes and put a single strike-through on the step you hide.

/lanage > Appraisal Templates >	
New Template [Preview]	
General Workflow Ratings Structure	Target Audience
1. Past Achievements	+ Add New Page + Add New Section
2. Future Planning	😰 A Step
3. Sian Off 🔶	Step 1 and Step 2 can be turned off dy selecting. Hide in Appraisal . The Stign Off Step is required and cannot be turned off. A Step consists of one or more pages.
	2 A Page
🛙 🖻 Sign Off 🛛 💠	Pages are seens as tabs in the appraisal with the page title as the tab label. A Page consists of one or more sections.
I Sign Off	A Section
	A variety of section types are available to capture different kinds of appraisal data. Choose the section type you want and customize the title and details.

To show again the step in appraisal, click the **Tools** icon and select the **Show in Appraisal**.

ew Template [Preview]	
eneral Workflow Ratings Structur	e Target Audience
I. Past Achievements 🔷	+ Add New Page + Add New Section
Show in Appraisal 2. Future Plann	A Step
	Step 1 and Step 2 can be turned off by selecting "Hide in Appraisal". The "Sign Off" step is

# Adding a New Page

This section discusses the procedure on how to add a page on a step.

To add a new page, under the **Structure** tab, click the **Tools** icon of the step where the new page will be added or click the **Add New Page** button.

fanage > Appraisal Templates >	
lew Template [Preview]	
General Workflow Ratings Stre	ucture Target Audience
1. Past Achievements	+ Add New Page + Add New Section
Add New Page	
2. Future Plann Rename this Step	A Step Step 1 and Step 2 can be turned off by selecting "Hide in Appraisal". The "Sign Off' step is
Hide in Appraisal	required and cannot be turned off. A Step consists of one or more pages.
3. Sign Off	A Page
I 🗈 Sign Off	Pages are seens as tabs in the appraisal with the page title as the tab label. A Page consists of one or more sections.
	A Section
I A Sign Off	A variety of section types are available to capture different kinds of appraisal data. Choose the section type you want and customize the title and details.

The screen refreshes and displays the *Create/ Edit Page*. Enter the Page Title in the **Page Title** field. Under the Step, you can change or select the step where you want to add the page.

ral Workflow Ratings	Structure	Target Audience
ast Achievements	¢	Create/Edit Page
uture Planning	¢	Page Title
ign Off	ø	Step
ign Off	•	Past Achievements 💌

Click the **Save** button to save the entered data.

# **Renaming a Page**

To rename a page, under the **Structure** tab, click the **Tools** icon of the step you want to rename. Click the **Rename this Page**.

Manage > Appraisal Templates >

ew Template [Preview]		
eneral Workflow Rating	s Structure Tar	rget Audience
1. Past Achievements	•	+ Add New Page + Add New Section
Add New Se	t Ob 🗢	A Step Step 1 and Step 2 can be turned off by selecting "Hide in Appraisa". The "Sign Off" step is required and cannot be turned off. A Step consists of one or more pages.
2. Future Plann Rename th Delete this 3. Sign Off	s Page Page <b>O</b>	A Page Pages are seens as tabs in the appraisal with the page title as the tab label. A Page consists of one or more sections.
I 🖻 Sign Off	٠	A Section A variety of section types are available to capture different kinds of appraisal data. Choose the section type you want and customize the title and details.
I 📕 Sign Off	٠	0

The screen refreshes and displays the Create/ Edit Page screen. Start renaming the page title.

Manage > Appraisal Templates >

New Template (Preview)

General Workflow Ratings St	tructure	Target Audience
1. Past Achievements	•	Create/Edit Page
" B Doformanaa Arainat Ob	*	Page Title
E Penormance Against Ob		Performance Against Obje
2. Future Planning	•	Step Past Achievements
3. Sign Off	٠	tes Save ← Cancel
I 🗈 Sign Off	•	
I 📕 Sign Off	٠	

Click the **Save** button to keep the changes.

# **Removing a Page**

To remove a page, under the **Structure** tab, click the **Tools** icon of the the page you want to remove.

1anage > Appraisal	Templates >	
New Templat	e [Preview]	
Canaral Markel	Datinga Structu	Tawat Audianaa
General workii	ow Ratings Struct	e Target Audience
1. Past Achiever	nonte	+ Add New Page + Add New Section
1. Fast Achiever	Tents	
I 🗈 Perform	ance Against Ob 🕻	A Step
_	Add New Section	Step 1 and Step 2 can be turned off by selecting "Hide in Appraisal". The "Sign Off" step is required and cannot be turned off. A Step consists of one or more pages.
2. Future Plann	Rename this Page	
	Delete this Page	A Page
3 Sign Off		Pages are seens as tabs in the appraisal with the page title as the tab label. A Page consists of

A confirmation box displays on the screen. Click **OK** to remove the **page**, otherwise click **Cancel** to cancel the deletion of the page.

Confirmation	×
Confirm to delete	the selected items
	Cancel
	JA Cancer

# Adding a New Section to a Page

To add a new section to a page, under the **Structure** tab, click the **Tools** icon of the page where the new section will be added or click the **Add New Section** button.



The screen refreshes and displays the *Create/Edit Section* screen. You can select or change the page where the section will be added

**Note:** You can drag and drop to change the position of the section. Choose the section type using the **Section Type** drop down button.

#### Manage > Appraisal Templates >



Once the section type is selected, you will be required to enter the required parameters and each section type requires different parameters. The next section discusses the required parameters for each section.

Once the section has been saved, the screen refreshes and displays the new section under the page where it is inserted.



# **Section Types**

This section discusses the different required parameters for each section types.

# Free Text

The Free Text section is a section where a user is expected to enter sentences.

Basic Info	
Section Title	
Pastian Code	
Section Code	
Description	
	/
Access Control	
√isible for Statuses ▼ Started	
🗹 Completed	
Allow edit by	
✓ Employee ✓ Appraiser	
Super-Appraiser	
Display	
Input Type	
Text Field	
Text Area	
Allow Copy	
Properties	
Copy Key	

To configure a free text section, a user needs to provide the following parameters:

#### **1.Section Title**

#### 2. Section Code

3. Description

# 4. Visible for status

Each section can be configured to be visible to the user only when the appraisal is in a certain state.

# 5. Allow edit by

This property allows you to specify who is able to edit the section:

None implies the section is read only and nobody is able to edit

- · Appraisee implies the section is read only for the Appraiser
- Appraiser implies the section is read only for the Appraisee

Both implies the section is editable for both the Appraisee and Appraise

### 6. Copy Key and Allow Copy

Appraisals typically involve objectives and other information which are carried forward from previous sections or even previous appraisals. In the Appraisal Template Editor, there is a configuration called Copy Key which can help to automate this process for users. The administrator can enter a value (up to 15 characters) in this field and link to another section of the same type by ensuring the same value is entered as the copy key for both sections. The source of the copied data will depend on which part of the appraisal the user is completing - please refer to the below example.

Assume a simple template with a Free Text section in the Past Achievements part and a Free Text section in the Future Planning part, both with the same value as Copy Key.

- User starts a new appraisal
- User enters "Some free text in past achievements" in the Past Achievements Free Text section
- User enters "Some free text in future planning" in the Future Planning Free Text section
- User completes the appraisal
- User starts a new appraisal
- User will see "Some free text in future planning" in the Past Achievements Free Text section for the new appraisal, copied over from the previously completed appraisal

In the above example, the data is copied over from the previous appraisal on starting a new appraisal. However, it may be necessary in some cases for a user to copy data from a section in Past Achievements to a section in Future Planning, all in the same appraisal. To accomplish this, in addition to the Copy Key configuration, the Allow Copy checkbox should be enabled for the section the user should copy to.

The flow would then be similar to:

- User starts a new appraisal
- User enters "Some free text in past achievements" in the Past Achievements Free Text section
- · User navigates to Free Text section in Future Planning which is empty
- User clicks Copy from Past Achievements button and "Some free text in past achievements" is copied into the text area
- The same concept applies to competencies and objectives

#### 7. Input Type

Allows you to select input type. Currently, there are two input types are available, namely:

- Text Area. Use this if you expected to enter sentences.
- Text Field. Use this if you expected to enter short sentence.

# **Learning Path**

A Learning Path section simply displays the current learning path of the appraise. To configure a learning section, a user needs to provide the following parameters:

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

Section Title	
Section Code	
Description	
<u></u>	
Access Control	
/isihla for Statuses	
ℤ Started	
7 Completed	

# **Training Record**

The Training Record section is a read-only section that displays the appraisee's transcript records for the appraisal period. The appraisal period is the start of the previous appraisal to the start of the current appraisal and any training that was enrolled upon or completed during this period is included.

To configure a training record section, a user needs to provide the following parameters:

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Display

This gives you an option on how the training records will be display. Currently there are two (2) options to select:

- Summarized table
- Full transcript details

Basic Info	
Section Title	
Section Code	
Description	
	7
Access Control	
Visible for Statuses ▼ Started	
Completed	
Display	
Format	
Summarized table	
Full transcript details	

# **Rating Summary**

Sections that involve rating scales can be configured to display the average rating as a summary. The system will calculate the average rating for the specified set of ratings e.g. Appraiser Rating. The degree of precision will depend on the values entered in the template's Overall Rating tab.

To configure the rating summary section, a user needs to provide the following parameters:

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Summary type

Allows you to select from the following options:

#### <u>Average</u>

With all appraisal sections configured to show Rating Summary, the overall rating summary will be calculated by summing up all the points scored in those sections and then divided by the number of items (e.g. number of objectives).

### <u>Total Percentage</u>

With all appraisal sections configured to show Rating Summary, the overall rating summary will be calculated by summing up all the point scored in those sections. A total percentage will also be calculated by dividing the total score by the maximum points that the user can be scored with the configured rating scales.

#### • Apply weighting to Rating Summary

In some cases, different appraisal sections may have different importance. This can be set up by setting weight on each appraisal section.

Note: Sections that are applicable for setting weight will show up for configuration after saving the section the first time.

Basic Info				
Section Title				
Section Code				
Description				
Jeschption				
Access Cor	trol			
Started Completed				
Display				
Summary Type	0			
Average	×			
Apply weig	hting to Rating Sumn	nary		
The followin	gs are the pages tha	t contain section(s) c	onfigured with Rating	Summary: mmary

#### **Single Choice**

This section allows the user to create statements to be selected by the appraisee or appraiser. To configure the single choice section, you are required to enter the following parameters:

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

- Display in Summary
- Single Choice Options

For every single choice section, you can configure a set of single choice options that will be specific to

that section. To add options to the section, enter the option text (or bundle key) into the text field and click Save. Once the option has been added, a new text field will appear for you to add subsequent options. There is no limit to the number of options you can have.

Section Title	
Section Code	
Description	
и 	
Access Control	
Visi <mark>bl</mark> e for Statuses IIII Started	
Completed	
Allow edit by I Employee	
Appraiser	
Super-Appraiser	
Employee Selection can only be made when submitting:	
Started 💌	
Appraiser Selection can only be made when submitting:	
Started 💌	
Agreed Selection can only be made when submitting:	
Started 💌	
Display	
cooper.	
Display in summary	
None	
Single Choice Options	
Delete Label Key	
Hide rating until this section has been rated by both parties	

# **Past Achievements**

This section allows the appraiser and appraisee to evaluate the appraisee's objectives, achievements, and employee's performance. It shows if the appraisee has fully, partially or never met his/her objectives.

To configure the single choice section, you are required to enter the following parameters:

#### **Create/Edit Section**

Basic Info	
Section Type: Past Achievements	
Section Title	7
Section Code	1
Description	
	/
Access Control	
Visible for Statuses Visible for Statuses Started	
Completed	
Allow edit by	
Appraiser	
☑ Super-Appraiser	

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

Display					
Max objectives					
Number of entries per objective					
Rating Summary					
None					
Rating Summary Labe	Key				
Input	Label Key	Locale Formatted Label			
Objectives	label.Areas_for_Improvement	Areas for Improvement			
Target Date		]			
V How	label.Evidence	Evidence			
Details		]			
Employee Rating		Employee Rating			
Appraiser Rating		Appraiser Rating			
Agreed Rating		Agreed Rating			
Allow Copy					
Automatic Copy					
Rating Scale					
(none)	(none)				
Hide rating until this	s section has been rated by both partie	es			
Properties					
Сору Кеу					
AREAS					

#### • Maximum Objectives

💼 Delete

🖶 Save

Enter the maximum number of objectives to be entered in the past achievements section.

#### • Number of entries per objective

Set the number of entries per objectives.

## • Rating Summary & Rating Summary Label Key

5 Cancel

Sections that involve rating scales can be configured to display the average rating as a summary. The system will calculate the average rating for the specified set of ratings e.g. Appraiser Rating. The degree of precision will depend on the values entered in the template's Overall Rating tab, please see the examples below.

### Columns

Columns that can be incorporate on the past achievements section:

Objectives	Text Area	
Target Date	Date Selector	

How	Text Area
Details	Text Area
Measure	Text Area
Employee Rating	Rating Scale
Appraiser Rating	Rating Scale
Agreed Rating	Rating Scale
Allow Copy	Check Box

**Note:** For the **Allow Copy** check box, even this option is ticked, this will not be shown in the past achievement page if there is no corresponding future objectives section.

### • Copy Key

(See the description on the Free Text section)

#### • Rating Scale

### Option to use the rating scale

Involving a rating scale is optional in Past Achievements sections but mandatory in Past Competencies sections. The Ratings tab in the Appraisal Template Editor allows you to configure any number of rating scales for the appraisal and each scale can be used by any number of sections in the template.

#### Option to use the individual competency proficiency scale instead of appraisal ratings

This option allows the users to rate each competency using the proficiency level scale specified in the competency instead of the appraisal rating scale. When this option is selected, the rating results will not be included in the rating summary calculation. Choosing this option will result in user's competency level being updated after the appraisal is signed off. Depending on the configuration, the final competency level assigned to the user will be in the order of agreed rating, or appraiser rating, or appraisee rating, whichever is first available. Since the appraisal rating scale is no longer used with this option, administrators are required to configure extra rating editing rules for this section (these rules are usually defined together with the appraisal rating scale).

#### Hide rating until this section has been rated by both parties

This gives you an option to hide the rating provided by raters until this section has been rated by both parties.

#### "Copy from Past Achievements" button

- a. If Past Achievement has items selected,
- 1. "Copy from Past Achievements" will show in Future Objectives
- 2. Clicking on it will copy the data over
- b. If Past Achievements is not available or is configured with a different COPY KEY
- 1. "Copy from Past Achievements" will be hidden

Objectives				
Clear Selected Copy from Pa	ast Achievements			
Objectives	Target Date	How	Details	
	This button will be his	dden		
	in unnecessary case	S.		
	1			

### Automatic Copy Option In Past Achievements Section

A new "Automatic Copy" option has been introduced in the Past Achievements section. It can only be chosen when "Allow Copy" is set. When this "Automatic Copy" option is chosen, a button will replace the "Allow Copy" (Carry Over) check-box.

When this button is pressed for a particular objective in the Past Achievements section, the objective data is automatically copied to Future Objectives section. This removes the need for a 'Copy from Past Achievements' button, which thus will not be displayed in the Future Objectives section when the "Automatic Copy" option is chosen. Once this button has been activated for a particular objective in the Past Achievements section, it cannot be activated again.



# Transferring Objective Data from Previous Appraisals

Objectives are always appraised within the Past Achievements section of an appraisal. Where these objectives have been set in a previous appraisal and this data needs to be brought forward, the system previously assumed that it would be held in the Future Objectives section of the previous appraisal. However, while this approach is appropriate when only annual appraisals are in use, it did not take account of mid-year appraisals, which commonly do not contain a Future Objectives section. This behavior has now been changed. The system will now try to find objectives in Past Achievements when the previous appraisals do not contain a Future Objectives section. Following is an example. Here is the full appraisal timetable for an organization which operates three monthly midyear appraisals alongside annual appraisals:
Appraisal No. (For Reference Only)	Туре	Period Start	Period End	Objectives are brought forward from
1	Annual	1st Jan 2011	31st Dec 2011	
2	Mid -Year	1st Jan 2012	31st Mar 2012	Future Objectives of 1
3	Mid -Year	1st Apr 2012	30th Jun 2012	Past Achievements of 2
4	Mid -Year	1st Jul 2012	30th Sep 2012	Past Achievements of 3
5	Annual	1st Jan 2012	31st Dec 2012	Past Achievements of 4
6	Mid -Year	1st Jan 2013	31st Mar 2013	Future Objectives of 5

When the previous appraisal has no Future Objectives section, the system will instead bring objective data forward from the Past Achievements section of this previous appraisal.

## Competencies

The Competencies section type list the competencies associated with the job profile (or profiles) assigned to the appraisee so that they can be rated against. In the below example, the check boxes under 'Development Needs' allow the appraisee to mark competencies which she/he may need to work on. The competencies with the checkbox enabled can later be copied to a Future Objectives section if suitably configured.

The Future Objectives section can be set up using the following configuration:

Basic Info	
Section Title	
Section Code	[2]
Description	
Access Control	
Started	
Completed	
Allow edit by	
Employee	
✓ Appraiser ✓ Super-Appraiser	
Competency Source	
Compatencies for assessment are selected from	
<ul> <li>Use competencies from job-profile</li> </ul>	
Use appraisee's current competencies	
Use competencies selected below	
Display	
Input Label Key	Locale Formatted Label
Use appraisee's current competencies	

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

- Rating Summary and Rating Summary Label Key
- Rating Scale

A CALCULAR CONTRACTOR	Label Key	Locale Formatted Label
🔽 Employee Rating	appraisal heading appraiseeRating	Employee Rating
Appraiser Rating	appraisal heading appraiserRating	Appraiser Rating
Agreed Rating	appraisal.heading.agreedRating	Agreed Rating
Allow Copy		]
Rating Summary		
None 💌	[	
Rating Summary Labe	I Key	
Rating Scale		
D From rating scale (	9	
Rating 1 💌		
Rating 1 💌 Prom individual con	npetencies ©	
Rating 1 💌 From individual con Employee Rating	npetencies <b>@</b> Is can only be edited when submitting:	
Rating 1 💌 From individual com Employee Rating Started 💌	npetencies @ is can only be edited when submitting:	
Rating 1 💽 From individual com Employee Rating Started 💌 Appraiser Rating	npetencies @ is can only be edited when submitting: s can only be edited when submitting:	
Rating 1 💌 From individual con Employee Rating Started 💌 Appraiser Rating Started 💌	npetencies <b>@</b> is can only be edited when submitting: s can only be edited when submitting:	
Rating 1 💌 From individual com Employee Rating Started 💌 Appraiser Rating Started 💌 Agreed Ratings of	npetencies <b>O</b> is can only be edited when submitting: s can only be edited when submitting: can only be edited when submitting:	
Rating 1 💌 From individual con Employee Rating Started 💌 Appraiser Rating Started 💌 Agreed Ratings of Started 💌	npetencies <b>@</b> is can only be edited when submitting: s can only be edited when submitting: can only be edited when submitting:	
Rating 1 💌 From individual com Employee Rating Started • Appraiser Rating Started • Agreed Ratings of Started •	npetencies (s can only be edited when submitting: s can only be edited when submitting: can only be edited when submitting: s from individual competency in the av	erage rating calculations
Rating 1 💌 From individual com Employee Rating Started 💌 Appraiser Rating Started 💌 Agreed Ratings of Started 💌 Ø Include rating Ø Hide rating until thi	npetencies s can only be edited when submitting: s can only be edited when submitting: can only be edited when submitting: s from individual competency in the aw is section has been rated by both parti	erage rating calculations
Rating 1 💌 From individual con Employee Rating Started 💌 Appraiser Rating Started 💌 Agreed Ratings of Started 🔍 Ø Include rating Ø Hide rating until thi Ø Display required pr	npetencies <b>@</b> is can only be edited when submitting: is can only be edited when submitting: can only be edited when submitting: is from individual competency in the av is section has been rated by both parti oficiency level on appraisals	erage rating calculations es
Rating 1 💽 From individual com Employee Rating Started  Appraiser Rating Started  Agreed Ratings of Started  J Include rating Hide rating until thi Display required pr J Display appraisee	npetencies s can only be edited when submitting: s can only be edited when submitting: can only be edited when submitting: s from individual competency in the av is section has been rated by both parti oficiency level on appraisals s previous proficiency level	erage rating calculations
Rating 1 💽 From individual con Employee Rating Started  Appraiser Rating Started  Agreed Ratings of Started  V Include rating Include rating Hide rating until thi Display required pr Display appraisee	npetencies <b>@</b> is can only be edited when submitting: is can only be edited when submitting: can only be edited when submitting: is from individual competency in the av is section has been rated by both parti oficiency level on appraisals is previous proficiency level	erage rating calculations es
Rating 1 💽 Rating 1 💽 From individual com Employee Rating Started 🔹 Appraiser Rating Started 🔹 Agreed Ratings of Started 🔹 Unclude rating Hide rating until thi Display required pr Display appraisee	npetencies s can only be edited when submitting: s can only be edited when submitting: can only be edited when submitting: s from individual competency in the av is section has been rated by both parti oficiency level on appraisals s previous proficiency level	erage rating calculations

🛢 Save 🔸 Cancel

#### • Columns

Columns that can be incorporate on the past achievements section:

Competencies	Competency Source (see the competency source below)
Employee/Appraiser Comments	Free Text
Employee Rating	Drop down selector
Appraiser Rating	Drop down selector
Agreed Rating	Drop down selector

The competency column displays the competencies specified in the "Competency Source":

Option to include Job Profile based competencies in appraisals

If this option is checked, all the competencies of the job profiles assigned to the appraisee will be selected for the appraisal. It does not matter if competencies in the job profiles are acquired by

training, by assessment, or by ad hoc assessment methods. In other words, no filtering is done for these competencies. By default, this option is turned on. If this option and the option to include existing user competencies in appraisals are both checked, the selected competencies for the appraisal would be the same as what are being selected for the past competencies appraisal section.

#### Option to specify the list of competencies to use in appraisals

Administrators can optionally specify an extra list of competencies to be included in the appraisal. The list of competencies will always be added to the appraisal regardless of which competencies the appraisees already have.

#### Option to include existing user competencies in appraisals

If this option is checked, all competencies awarded to the user will be selected for the appraisal. These are the competencies shown in the "My Competencies" in Career Development. By default, this option is turned on. If this option and the option to include job profile based competencies in appraisals are both checked, the selected competencies for the appraisal would be the same as what are being selected for the past competencies appraisal section.

#### Include ratings from individual competency in the average rating calculations

This option lets the HR manager who is editing the template to choose whether ratings from competency section are to be included in average rating calculations when the source of the rating is "From individual competencies".

The option by default is checked which means the competency proficiency level would be taken into account when calculating the average rating in rating summary section.

#### **Appraisal Dimension**

Appraisal Dimensions is a section type that allows comments and ratings to be made against a fixed set of "dimensions".

	Dimension	Employee Comments	Appraiser Comments	N/A	Employee Rating	Appraiser Rating	Agreed Rating
Leadership skills					123	123	123
Manager's skills			c		123	123	123
				1			

Sample Appraisal Dimension

## The appraisal dimension has the following configurations:

Section Title	
Section Code	
Description	
Description	1
(c)	16
2-200x (2-200) EV 200	
Access Control	
Access Control	
Access Control Visible for Statuses Visited	
Access Control Visible for Statuses Started Completed	
Access Control Visible for Statuses Started Completed Allow edit by Employee	
Access Control Visible for Statuses Started Completed Allow edit by Employee Appraiser	

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

(none)		
Input	Label Key	Locale Formatted Label
Employee Comments	heading.appraisal.appraiseeComments	Employee Comments
Appraiser Comments	heading.appraisal.appraiserComments	Appraiser Comments
Employee Rating		Employee Rating
Appraiser Rating		Appraiser Rating
Agreed Rating		Agreed Rating
Properties		
ppraisal Dimensions		
Delete Dimension		

## • Rating Summary and Rating Summary Label Key

• Rating Scale

If ratings are required, a rating scale should be selected and the appropriate rating column(s) enabled. If comments are required, the appropriate comments column(s) should be enabled. In this case, all comments and rating columns are required and are thus checked.

### Columns

Appraisal Dimensions	Text areas
Employee's Comments	Text areas
Employee Rating	Rating Scale
Appraiser Rating	Rating Scale
Agreed Rating	Rating Scale

## **Goals Result**

Determines on how goals will be added on the section. Below is a sample image on how a goal selection appears on the appraisal review.

Goals						
Goals within the target period of appr	aisal will be considered.			1	No	
				2	Partial	
				3	Yes	
1 Selant Caste 1 Courter Cast				N/A	Not Applicable for this	Review
Goal	Appraisee Comments	Appraiser Comments	Appraisee Rating	Appraiser Rating	Agreed Rating	
Focus on knowledge mgt.			123	(restricted)	123	
						1
Improve technical writing			123	(restricted)	123	÷

Once the Select Goals button is clicked, the menu for selecting menu is displayed as shown below:

Select Goals						
Performance Goals Organizatio	nal Goals					
Titl	e	Target Date	Status	Progress	Category	Weight
Jun 1, 2012 - Jun 30, 2012		Jul 27, 2012	Pending	0%	Financial	1% +
Description Aim to increase daily productivity b	oy 5%					
Measurement & Milestones The number of tasks done per day						
Progress Detail Completed task 1 and 2 within 1 da	ау					
<b>Status</b> Pending						

The menu allows you to select which goals to add (Performance Goals or Organizational Goals). It displays details such as start and Target Dates, Description, Measurement and Milestones, Progess Details, and Status.

To add the goal, click the **Plus** button positioned at the end of each goal. This section can be configured when selecting the Goals Selection section types:

Section Title	
Section Code	
Description	
Access Control	
Access Control Visible for Statuses Started	
Access Control Visible for Statuses Visible for Statuses Completed	
Access Control Visible for Statuses Started Completed Allow edit by Employee	
Access Control Visible for Statuses Visible for Statuses Started Completed Allow edit by Employee Appraiser	

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

- Goal Selection
  - Automatic All Selectable Goals will be added automatically.
  - **Manual** Allow goals to be selected from the appraisee's goals;Allow performance goals to be created/edited from within the appraisal because once an appraisal is started, appraisee's goal list will be locked and he will not able create/edit goals even they find some goals missing or incorrect; Goals created within an appraisal will be included by default.

(none)		
Input	Label Key	Locale Formatted Label
Employee Comments	heading.appraisal.appraiseeComments	Employee Comments
📝 Appraiser Comments	heading.appraisal.appraiserComments	Appraiser Comments
Employee Rating		Employee Rating
Appraiser Rating		Appraiser Rating
Agreed Rating		Agreed Rating
Properties		
Appraisal Dimensions		
Deleter Dimension		-

- Rating Scale Rating Summary and Rating Summary Key Label

## Columns

Goal Selection	Text areas
Employee Comments	Text areas
Appraiser Comments	Text areas
Employee Rating	Rating Scale
Appraiser Rating	Rating Scale
Agreed Rating	Rating Scale

# **Future Objectives**

Future Objectives sections allow the user to set objectives for the coming appraisal period. If configured, user entered data can be copied from past achievements or past competencies sections and can also be carried forward to the user's next appraisal.

The Future Objectives section can be set up using the following configuration:

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

#### • Allow Copy and Copy Key

(See the description on the Free Text section)

- External Content URL
- With
- Height
- Maximum Objectives

Enter the maximum number of objectives to be entered in the past achievements section.

#### • Number of entries per objective

Set the number of entries per objectives.

• Columns

Columns that can be incorporate on the past achievements section:

Objectives	Text Area
Target Date	Date Selector
How	Text Area
Details	Text Area

Access Control	
Visikle for Statussa	
Visible for Statuses Visible for Statuses	
Completed	
Allow edit by	
Employee	
Super-Appraiser	
Display	
External Content URL	
Width	
0	
Height	
0	
Min objectives	
6	
Max objectives	
6	
Number of entries per objective	
1	
Input Label Key	Locale Formatted Label
☑ Objectives	
Target Date	
THE 11	
V How	
V Details	
🔲 Алоw Сору	
Properties	
Copy Key	
zna prako poznako. T	

## **Career Development**

🗃 Save , Cancel

The Career Development section type offers an objective defining matrix that is grouped by labels. Users can enter as many rows under each grouping as required and, for convenience, the objectives entered here will automatically be copied over to the appraisee's next appraisal.

#### Clear Selected



Typically, the labels would be time intervals though they can in fact be any text up to 1000 characters in length. The labels are specific to each Career Development Section and are configured under *Career Development Intervals*. See Appraisal Columns for more information on how to configure the columns in the table. The above form can be produced using the following configuration:

Section Title	
Section Code	
Description	
	//
Access Control	
/isible for Statuses	
☑ Started	
Completed	
Vilouradit hu	
Allow edit by Employee	
Allow edit by Employee Appraiser	
Completed Allow edit by Z Employee Z Appraiser Z Super-Appraiser	
Allow edit by Z Employee Z Appraiser Z Super-Appraiser Display	
Allow edit by Complexee Appraiser Super-Appraiser Display Input Label Kev	Locale Formatted Label
Allow edit by I Employee Appraiser Super-Appraiser Display Input Label Key	Locale Formatted Label
Allow edit by Completed Allow edit by Completed Allow edit by Appraiser Super-Appraiser Display Input Label Key	Locale Formatted Label
Allow edit by P Employee Appraiser Super-Appraiser Display Input Label Key Objectives How	Locale Formatted Label
Allow edit by P Employee Appraiser Super-Appraiser Display Input Label Key Objectives How Details	Locale Formatted Label
Allow edit by Completed Allow edit by Completed Allow edit by Completed Comp	Locale Formatted Label
Allow edit by Compresed Allow edit by Compresed Allow edit by Compresed Comp	Locale Formatted Label
Completed   Allow edit by   Imployee   Appraiser   Super-Appraiser   Display   Input   Label Key   Objectives   Objectives   How   Details   Measure   Target Date	Locale Formatted Label
Completed   Allow edit by   Employee   Appraiser   Super-Appraiser   Display   Input   Label Key   Objectives   How   Details   Measure   Target Date   Career Development Intervals   Delete   Label Key	Locale Formatted Label
Completed   Allow edit by   Employee   Appraiser   Super-Appraiser   Display   Input   Label Key   Objectives   Objectives   How   Details   Measure   Target Date   Career Development Intervals   Delete   Label Key	Locale Formatted Label

### **Goal Plan**

Users can create performance goals via the past achievements part or the future planning part of their appraisal, and these goals will be viewable from the appraisal and in his/her own Performance Goal list. After the appraisal is completed, the user can continue to manage his/her goals in the Performance Goal area.

ncrease Sale by 25 %	Jul 28, 2012	Pending	0%	Increase sales by 25%	12%
Decrease Cost by 25 %	Jul 27, 2012	Pending	0%	Improve project planning techniques	15%

The Goal Plan section can be set up using the following configuration:

- Section Title
- Section Code
- Description
- Visible for status

(See the description on the Free Text section)

• Allow edit by

(See the description on the Free Text section)

Note: The goals created in the appraisal also shows in Career Development, Goals.

Basic Inio	
Section Title	
Section Code	
Description	
Access Control	
Visible for Statuses	
📝 Started	
☑ Started ☑ Completed	
☑ Started ☑ Completed Allow edit by ☑ Employee	
♥ Started ♥ Completed Allow edit by ♥ Employee ♥ Appraiser	

#### **Succession Planning**

Succession Planning is a new section type that allows managers to establish the promotion characteristics and retention risk for each of their staff:

- Users, with access rights to both Manage Menu and Appraisal Manager, can manage the Succession Planning Section in an Appraisal Template with different question types and user defined scores.
- Users, with access rights to do appraisals, can perform a Succession Planning Review in an Appraisal.
- "Plot 9-box Promotion Potential Report" has been added to Review Bulk Action.

The section type is only available in the Sign Off step of the appraisal. At most one Succession Planning section can be added to a Sign Off page.

## Access Control

As with all other appraisal section types, Section title, Section Code, Description, and Visible for Statuses can be specified. This section type can be configured to Allow edit by the appraiser and/or the super appraiser, but never by the appraisee at any point. Also, in the appraisal template, users can configure the status under which Appraiser Selection must have been made when submitting the appraisal form.

## • Setting up Succession Planning Questions

In the Succession Planning section, at least one single choice question should be setup, with each question associated with at least two answer options. There are three types of questions, namely Promotion Potential, Retention Risk, and Reason for Leaving. For Promotion Potential and Retention Risk question types, distinct non-negative scores should be given to the answer options for future promotion/retention analysis.

To create a new question, click the "Create New Question" button at the bottom of the Display legend. Once a question is created, Select a Type, enter the question Description and Option Description. If necessary, click on the last empty option field to create new options, click the cross button at the right end of an option to delete the option, and click the gear button to popup the action menu to delete the question.

Sel	ect a Type*		
Pr Re Re	romotion Potential ention Risk ason for Leaving sentiartor Frombuon		
Op	tions Description (Label Key)*	$\wedge$	
D	escription (Label Key)	Score	
ŀ	las the potential to move up two or more levels	5.0	
F	las the potential to move up a level	4.0	
V	Vell suited to current position	3.0	0
1	leeds to develop into current position	2.0	0
L	Insatisfactory in current position	1.0	0
Qu	estion		
Qu	estion estimates and the states of the state		
e R Der	estion to the aving the aving to the aving t		
e R Op	estion to Leaving eason for Leaving scription (Label Key)* eason for Leaving ions Description (Label Key)*		
e R Der R Op	estion eason for Leaving scription (Label Key)* eason for Leaving tions Description (Label Key)* escription (Label Key)		
e R Det Qu Det	eastion eason for Leaving eason for Leaving ions Description (Label Key)* escription (Label Key) escription (Label Key) ack of career progression		
e R De: D D	estion eason for Leaving scription (Label Key)* eason for Leaving tions Description (Label Key)* escription (Label Key) ack of career progression fore compensation		
e R Der R Op L	estion eason for Leaving scription (Label Key)* aeson for Leaving ions Description (Label Key)* escription (Label Key) ack of career progression fore compensation Returning to full time education		
e R De: R Op L L	estion eason for Leaving scription (Label Key)* eason for Leaving tions Description (Label Key)* escription (Label	•	
e R De: R Opp	estion eason for Leaving eason for Leaving icons Description (Label Key)* escription (Label Key)* escription (Label Key)* escription (Label Key) ack of career progression More compensation Returning to full time education wher reason Inlikely to leave	0	
Qu P P P P P P P P P P P P P P P P P P P	eastion eason for Leaving eason for Leaving ions Description (Label Key)* escription (Label Key)* escription (Label Key)* escription (Label Key) ack of career progression fore compensation there reason Wher reason Where reason Inlikely to leave	0	

#### • Update Restriction after the Appraisal Started

In general, any major structural change to an appraisal template is disabled after an appraisal has been started using the template. In the Succession Planning section, after appraisal start-up, users cannot add/delete questions/options or change the question type. Users can still edit the question description, option descriptions and scores.

Display	
luestion 1 🕸 🖌	
elect a Type*	
Promotion Potential 🚽 🚩	
escription (Label Key)*	
Promote this guy to senior developer in 2013	
ptions Description (Label Key)*	
Description (Label Key)	Score
Promote 3 level to manager	9.9
Promote 2 level to senior	8.8
Suite current position	7.7

• Succession Planning Section - Review in Appraisal

After starting an appraisal with a template with a succession planning section, the appraiser or super appraiser, but not the appraisee, can view the succession planning questions. Depending on the "Allow

edit by" setting in the template, the appraiser or super appraiser may answer the questions (by clicking the radio buttons).

- All questions must have been answered before submitting the appraisal form under the status as configured in the template.
- Any new attempt of the questions, if not explicitly saved/submitted by the user, will be auto-saved after 5 seconds.
- After save, the scores of the selected answer options, as defined in the template, will be stored in the system for further promotion/retention analysis (such as plotting the 9-box report).

orformance Povious for STUDENT 111			rint Preview Save Save and Close
1. Past Achievements	2. Future Planning	D	3. Sign Off
Sign Off			
Succession Planning in Performance Review 2013			
Succession Planning in Performance Review 2013			
Potential for Promotion Has the potential to move up two or more levels Has the potential to move up a level Well suited to current position Needs to develop into current position Unsatisfactory in current position			
Rate the appraisee on the likelihood of their leaving the org         Likely to leave within a year         Likely to leave within three years         Likely to leave within five years         Unlikely to leave	ganization		
Leaving Reason More compensation Returning to full time education Other reason			
<ul> <li>Unlikely to leave</li> <li>Click Submit to proceed to the next stage of this appraisal.</li> </ul>			
Submit Current Review			Save Save and Close

# Setting Target Audience of the Appraisal Template

This feature allows the appraisal template to be visible or available for specific users only. To do this, click on the name of the template you wish to configure.

Manage >

Appraisal Manager

Temp	lates Status Category	Group Em	ail App	raisal Search		
Bulk	Action 💌					+ Create Template
	Template Name	Status	Туре	No. of Appraisals	Created On	Created By
	• New Template	Inactive	Annual	0	Nov 5, 2012 12:01 PM	MOLINA Alon
	New Template	Inactive	Annual	0	Nov 5, 2012 9:45 AM	MOLINA Alon
	New Template	Inactive	Annual	0	Oct 31, 2012 5:31 PM	HUELGAS Andrew
	New Template	Active	Annual	1	Jul 16, 2012 10:18 AM	MOLINA Alon
	Default Template	Active	Annual	4	Jul 12, 2012 12:25 PM	ADMINISTRATOR System

The Appraisal Template Editor screen opens on a new window. Click the Target Audience Tab. Click the **Save** button to keep the settings.

NetDimensic	ns Talent Suite	Mar	age Center				🛎 SAPLA
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Appraisal Templa	tes >						
New Templ	ate [Preview]						
General Wo	kflow Ratings	Structure	Target Audience				
Users			_				
In addition to the	proviously solocto	ducore view r	//	od to anvono w	he mosts		
All of the follow	ving criteria	u users, view p	ermissions will be grant	eu to anyone w	no meets		
	owing criteria						
One of the following							
One of the following	tor:						

On this tab you can set the target audience the following way:

- To select a specific user click the Users link. This opens the menu for selecting the user.
- You can also set criteria wherein the user(s) who will meet these criteria will have the permission to view or use the appraisal template. To do this:
  - Add the criteria using the **Add criteria selector** drop down menu, then click the **Go** butto n.

Add criteria selector:

User Group 🔹	Go
User Group	
Organization	
Role	
User Attribute 1	
User Attribute 2	
User Attribute 3	
User Attribute 4	
User Attribute 5	
User Attribute 6	
User Attribute 7	
User Attribute 8	
Organization Attributes	

• The selector of the selected criteria is displayed right after the **Add criteria selector**. For instance, you selected the "user group" criteria; the user group selection box is displayed as shown on the image.

In addition to the previously selected users, view permissions will be granted to anyone who meets

All of the following criteria

Add criteria selector [:]	User Group	🔽 😡	3
User Groups			8
			h

- Click the **User Groups** link to display the menu for selecting the user group.
- You can add another criterion using the **Add the criteria selector** from the drop down menu. For instance this time you select **Organization**. The organization selection box is displayed as shown on the image.

One of the following criteria

ser Groups		U
RoLe		8
ole		

Once you are done in selecting the criteria, you may now select between the following:

#### All of the following criteria

Choosing this option means that all user who belongs to the selected user groups **AND** role will have the access to the appraisal template.

A user who belongs to one of the criteria only will not be given the permission to view or use the appraisal template.

#### One of the following criteria

Choosing this option means a user who belongs to any of the criteria will have the permission to view or use the appraisal template.

For example, a user belong to the user group but not on the role specified on the criteria will still have the access to view or user the appraisal template.

## **Resource Bundles**

Most text entered in the appraisal template editor can be replaced with a bundle key so that text will be translated to the target user's language in multilingual sites (provided the corresponding translations are in the relevant custom.properties files).

## **Create/Edit Section**

Section Type: Pas	t Achievements			
Section Title				
ection Code				
escription				
desc.Assessi	ng_Past_Perfo	rmance		
desc.Assessi	ng_Past_Perfo	ormance		
desc.Assessin	ng_Past_Perfo	ormance		
desc.Assessi	ng_Past_Perfo	ormance		

# **Appraisal Enhancements**

## **Multiple Active Templates**

This enhancement allows more than one appraisal template to be active and as such, the user interface of the appraisal template list has changed. The templates are selected with check boxes, and the administrator can perform batch delete, activate, deactivate and clone on the selected items.

Manage >

Appraisal Manager

Tem	plate	s Status Category	Group Err	iail Appi	raisal Search		
Bulk	< Act	ion 💌					+ Create Template
		Template Name	Status	Туре	No. of Appraisals	Created On	Created By
	Ф	New Template	Inactive	Annual	0	Nov 5, 2012 12:01 PM	MOLINA Alon
	۰	New Template	Inactive	Annual	0	Nov 5, 2012 9:45 AM	MOLINA Alon
	٠	New Template	Inactive	Annual	0	Oct 31, 2012 5:31 PM	HUELGAS Andrew
	۰	New Template	Active	Annual	1	Jul 16, 2012 10:18 AM	MOLINA Alon
	•	Default Template	Active	Annual	4	Jul 12, 2012 12:25 PM	ADMINISTRATOR System

Click Activate Selected. Selected items become active.

Manage >

Appraisal Manager

BUIK ACT	ion 💌						+ Create Template
Bulk Act Delete	ion	plate Name	Status	Туре	No. of Appraisals	Created On	Created By
Clone	8	Template	Inactive	Annual	0	Nov 5, 2012 12:01 PM	MOLINA Alon
Deactiva	te	Template	Inactive	Annual	0	Nov 5, 2012 9:45 AM	MOLINA Alon
V •	New	Template	Inactive	Annual	0	Oct 31, 2012 5:31 PM	HUELGAS Andrew
Ø 🗘	New	Template	Active	Annual	1	Jul 16, 2012 10:18 AM	MOLINA Alon
7 0	Defa	ult Template	Active	Annual	4	Jul 12, 2012 12:25 PM	ADMINISTRATOR System

Users can select the template from the list of active appraisal templates when they start an appraisal. If selected, the system will generate an appraisal form with a structure as defined in the selected template. The appraisal will then be tied to that template and will remain the same thereafter even if the template is deactivated. As such, only templates with '0' as No. of Appraisals can be deleted.

Create New Appraisal	3
Appraisal Template:	
New Template Default Template	
MOLINA Alex	
MOLINA Alon	
Change Reviewer	
Your Super Reviewer:	
Change Super Reviewer	
Carrier (Bacacathan ) , rains (rains)	
Carrier Do receber o revision and	
Save	Cancel

## Audit Log for Status Change of Appraisal Form

Users with appraisal administrative rights can view the change logs of appraisals. To view the change

logs of an appraisal, click Change Logs when an appraisal is opened.

. Past Achievements 2. Future Planning	
Run De	3. Sign Off

The appraisal change logs display all the details of status changes associated with the current appraisal.

Appraisal Change Logs						
Close Change Logs						
User	Role	Date	From Status	To Status	Reason	
blow	Appraisee	Sep 28, 2010 4:25 PM	Started	STAGE1	11	
danny	Appraiser	Sep 28, 2010 4:26 PM	STAGE1	Started	WWW	
blow	Appraisee	Sep 28, 2010 4:37 PM	Started	STAGE1		
danny	Appraiser	Sep 28, 2010 4:37 PM	STAGE1	Started	abc	
blow	Appraisee	Sep 28, 2010 4:39 PM	Started	STAGE1		
danny	Appraiser	Sep 28, 2010 4:40 PM	STAGE1	Started	XOV	
blow	Appraisee	Sep 28, 2010 4:52 PM	Started	STAGE1		
danny	Appraiser	Sep 28, 2010 4:54 PM	STAGE1	Started	xswdf	
blow	Appraisee	Sep 30, 2010 3:40 PM	Started	STAGE1		
danny	Appraiser	Sep 30, 2010 3:41 PM	STAGE1	STAGE2		
ndadmin	Super-Appraiser	Sep 30, 2010 4:41 PM	STAGE2	STAGE3		
danny	Appraiser	Sep 30, 2010 4:44 PM	STAGE3	Completed		

#### Prompt for Reason when Reversing/Re-opening Appraisal Status

The system will prompt for the reason of appraisal manual status change and appraisal re-open actions. The reason is mandatory, and will be shown in the appraisal change logs.

You can set objectives and review your performance with your manager using the appraisal process.	Your Job Profiles:     None Assigned
Your Responsibilities You are responsible for completing and submitting the appraisal to your manage	Appraisal Template: er for Danny Template
reviewicompletion. Manager's Responsibilities	Your Reviewer:
The manager is responsible for reviewing the appraisal and marking it as compl	lete. Change Reviewer
Reason for Appraisal Status Change	Your Super Reviewer: ADMINISTRATOR System
Please enter the reason for changing the appraisal status.	he Change Super Reviewer
Need to make minor adjustments to the appraisal.	Save
	Your Current Review Status: STAGE1 -
Cancel OK	Update Status Delete Appraisal
	ADMINISTRATOR System

## Signature and Circulation Records on Sign-Off Page

The signature and circulation records are shown in the sign-off page of an appraisal if any of the status in the appraisal flow requires a signature. It displays the date and time that each status is completed, and if the status requires a signature, the user ID of the signer is also displayed.

Save

Submit Current Review

Appraiser's Final Com	ments	
Outstanding year	. Reep up the good work!	
Compliance attitude Please record here the	extent to which the individual has understood and complied with all applicable	e laws, rules, and regulations. Please indicate the individual's gener
Separate career dev	elopment dialogue required	
Appraisee acceptan	ce ce	
Appraisal Signatures	and Circulation	
Status	Signed by	Date Submitted / Signed
Started	No specific signature required	Oct 15, 2010 3:36 PM
STAGE1		
STAGE2		
STAGE3		
Completed		

The input boxes for user ID and password are displayed at the appropriate status when a signature is required.

Appraiser's Final Comm	nemts	
Outstanding year	. Keep up the good work!	
Compliance attitude		
Please record here the e attitude towards complia	xtent to which the individual has understood and complied with all applicable to nce.	aws, rules, and regulations. Please indicate the individual's general
Separate career deve Appraisee acceptance Appraiser acceptance	Nopment dialogue required. e e	
Appraisal Signatures an	nd Circulation	
Status	Signed by	Date Submitted / Signed
Started	No specific signature required	Oct 15, 2010 3 36 PM
STAGE1	No specific signature required	Oct 15, 2010 3:40 PM
STAGE2	UserID	
	Parament	
	Password	
STAGE3		
Completed		
Submit Current Review		
		Save

## **Appraisal Search**

This enhancement allows either of the following:

- 1. Managers to search for appraisee's' appraisal forms
- 2. Administrators to search for all users' appraisal form

To access this function, click **Manage Center> Talent >**, under the *Appraisal Manager* click the **Apprai sal Search** link.

NetDimensions Talent Suite		Manage Center				🚨 MOLINA Ak	
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Compliance	Analytics	C	ompetency Manager		Goal Manager		Appraisal Manager
Organizatio	n Analysis	Li	brary		Goal Manager		Templates
Org Summ	ary Analysis	С	ompetency Models				Appraisal Status Category
Appraiser A	Analysis	P	roficiency Levels				Group Email
User Group	Analysis	Jo	b Profiles				Appraisal Search
		A	ssessment Managem	ent			
		U	ser Search				

The Appraisal Search page appears. Search for your employee's appraisal here. Use the following filters to limit the search result.

**Appraisal Manager** 

emplates	Appraisal Status Categ	gory Group Email	Appraisal Sea	rch	
u can searc	ch for your employee's a	ppraisal here. Use th	e following filters t	o limit the search result.	
Appraisal T	emplate	Appraisal Status C	ategory	Employee Family Name	Employee Given Name
AII		All	•		
Appraisal S	tarted From	То			
(not specif	ied) 📑 🍠	(not specified)	📃 🚍 🧈		
Appraisal C	ompleted From	То			
(not specif	ied) 🛛 🧮 🍠	(not specified)	1		
Search					

Click on the link on User ID to launch the searched appraisal.

#### **Appraisal Manager** Templates Appraisal Status Category Group Email Appraisal Search You can search for your employee's appraisal here. Use the following filters to limit the search result Appraisal Template Appraisal Status Category Employee Family Name Employee Given Name IIA II . All To Appraisal Started From (not specified) 🔚 🤌 (not specified) 📇 🤌 Appraisal Completed From To (not specified) 🧮 🥕 (not specified) 🗮 🥕 Search Results 1 - 2 of 2 User ID \$ sara HO Sara Competencies Jan 29, 2013 10:35 AM Started ٥ empno005 SANTOS Vina Competencies Jan 29, 2013 4:13 PM Started << Page 1 of 1 >>

If you are an Appraisal Administrator (Allow User Appraisal Administration = Yes for the role), you will be able to review all appraisals. Otherwise, only appraisals that you have taken part in are reviewable. The following message will be shown if you do not have the right to review the searched appraisal form. Note: If the resulted appraisal is not completed yet, the introduction page of the appraisal form will be shown, thus, allowing manager/admin to make changes to appraisal properties like reviewer/super reviewer. If the resulted appraisal is completed, the appraisal form itself will be launched directly.

## E-mail Template Editor for Appraisal E-mails

The Configurable Appraisal Workflow allows up to two e-mail templates to be selected per appraisal

status. Such e-mails will be sent when the performer submits the appraisal in the respective statuses.

- To send to the appraisee, the existing "Participant" recipient should be enabled
- To send to the appraiser, the new "Appraisal Reviewer" recipient should be enabled
- To send to the super-appraiser, the new "Appraisal Super-Reviewer" recipient should be enabled

E-mail Template Editor	D B. 9 ?	*			
Templates					
E System Default	ENGLISH (Default) Add new language				
EUser Templates	Save Create A Conv. Cancel Usane Delete A	1			
APPRAISAL WORKFLOW TRAINING	Gave Cleater Copy Gancer Gsage Deleter				
EQUEST					
Approval Expired Notification					
<ul> <li>Came Law Scheduled Report</li> <li>a ort valid</li> </ul>	Name APPRAISAL WORKELOW TRAINING REQUEST				
Certification Awarded Message	APPRAISAL WORKFLOW TRAINING REQUEST				
checklist	Sender				
Copy of-Default Certification Expiration	Constitution of the empirit				
minder	Specify the sender of the e-mail.				
Copy of-Default Session Changed Email	ADMINISTRATOR System (NDADMIN)	🛍			
tructor					
Copy of-Default Session Changed Email	Language Preferences				
Custom message test	Send Message in "To" recipient's language (and disable	e "CC" options	5)		
Ousion message test	Recipients				
enrollment confirmation try					
<ul> <li>Exam template editor email notification for</li> </ul>	Select from the list below the intended recipients for this i	nessage.	-		
ed attempt			Io	CC	Omitted
Exam Template Email Notification	Approver		0	0	۲
Generic Schedule Report Complete	Participant		۲	0	0
<ul> <li>ISO Certification completion</li> </ul>	Direct Appraiser		$\odot$	$\bigcirc$	۲
JEA Sample E-mail Template	HR Manager		$\odot$	$\odot$	۲
Multi-lingual email test	Course Specific Instructor(s)		$\bigcirc$	$\bigcirc$	۲
Notify before expiration of competency	Default System Approver		$\bigcirc$	$\bigcirc$	۲
Not-Yet-Accessed Reminder	Default System User/Administrator		$\bigcirc$	•	۲
On Site Safety     Sample E mail Templete	Appraisal Reviewer		$\bigcirc$	$\bigcirc$	۲
Scheduled Pup of Poport D301 Complete	Appraisal Super-Reviewer			•	۲
Session Completion Notification	Organization Approver				۲
SUBMIT AGREED APPRAISAL	Specific User		Ō	Ō	۲
SUBMIT PENDING APPRAISAL			-	_	-
SUBMIT REVIEW APPRAISAL					
SUBMIT STARTED APPRAISAL	External E-mail			0	۲
Task Approval Reminder	Messages may be sent to one or more external e-mail ad	dresses. Use	comma (,)	) to separate m	ultiple addresses.
<ul> <li>Test</li> </ul>					
<ul> <li>Test Evaluation Reminder</li> </ul>					
Iest Params	Message				
<ul> <li>Test lemplate for analyzing issues</li> </ul>	Enter a new massage or select text from one of the prode	fined more an	os (the tex	rt may be alter	d for this aposifie
TestCert email	measage). Substitution parameters are indicated as first	med itessag	es (tile te)	contray be attend	su for this specific
	message). Substitution parameters are indicated as (Keyv	vord} text ar	iu otners r	nay be added u	ising the arop-aown
	list below.				
	Language English				

## Group E-mail to Appraisal User

This enhancement allows administrator to send email to a group of users with specific appraisal role and appraisal status. For example, send a email to all appraiser with Pending status to remind them to review their appraisees' appraisal form.

To access this feature, click **Manage Center> Talent >**, under the *Appraisal Manager* click the **Group Email** link.

NetDimens	ions Talent S	uite	Manage Center				
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Compliance	Analytics n Analysis	Ci Li	ompetency Manager brary		Goal Manager Goal Manager		Appraisal Manager Templates
Org Summa	ary Analysis	С	ompetency Models				Appraisal Status Category
Appraiser A	nalysis	P	roficiency Levels				Group Email
User Group	Analysis	Jo	b Profiles				Appraisal Search
		A	ssessment Managem	ent			
		U	ser Search				

The *Group Email* page appears. Click on the link on To/Cc to select recipients of the email. The Select To/Select CC screen appears.

#### **Appraisal Manager**

nd group email to users with particular appraisal role and/or with particular apprais	ai status category.
Details	
TO:	0 selected
:C:	0 selected
Search for a user	***
ubject:	
202200	
essage	
lessage	
essage	
lessage	
essage	
lessage	
lessage	

From here, the user can enter search keyword into the quick search box, and the system will return matching results as the user types.

end Details	
Го:	
e	
ADMINISTR	ATOR System (N Select To Recipients
APAC Stev	ay (STEVEY_APAC)
CALUMBA A	inee (NETD_AINEE)
CHAVEZ Es	ter (EMPNO010)
CHAVEZ Fr	anco (NETD_FRANCO)
CRUZ John	(EMPNO007)
DELEON He	nry (EMPNO006)
EVANS Jon	(JEVANS)
GURRALA S	hravan (NETD_SHRAVAN)
HUELGAS A	ndrew (NETD_ANDREW)
lessaye	

To open the advanced search interface, the user can click the "..." box beside the quick search box. From this user selector, you can look for user with basic user information like User ID, Family Name or Given Name; and appraisal related information like Appraisal Role and Appraisal Status.

Iser ID	Last Name	First Name	
556112	Last Name	That Name	
Appraisal Role	Appraisal Status C	ategory	
All	All		
Search Reset			Vertical Vie
lesults: 0			ventical vie
* <b>~</b> ^ *			
* <u>~</u> ^			
elected: 0			

The advanced search interface looks very similar to the original user selector pop-up box, but the user can switch between horizontal arrangement and vertical arrangement for the search result box and the selection box. After selection, the selected recipients will be displayed.

o. 4 selec	ed
SANTOS Vina (EMPNO005) × ADMINISTRATOR System (NDADMIN) × MOLINA Alon (NETDALON) × HO Sara (SARA) ×	-
Search for a user	
C: 0 selec	ed
Search for a user	
Subject:	
essage	

The user can remove any user selection with the cross on the right-hand side.

Group-assign					
Group Assign to	users:			17 select	ed
ADMINISTRATOR	System ×	HUI	Danny ×		
LEARNER Mary ×	LIM Gar	bo ×	STUDE	NT Angel ×	
STUDENT George	× STU	DENT	Jack ×		
STUDENT Jane ×	STUDE	NT Jo	e ×		
STUDENT John ×	Show a	11			

Also, when there are more than 10 users are selected, only 10 user tokens are displayed in the user selector box, and the "show all" button is displayed.

Note that the number of selected users is shown on the above the right-hand side of the quick search box. Clicking the "show all" button will display all the user selected within the user selector box.

#### **Super-Appraisers**

Default Template (Preview)

The role, Super-Appraiser is used to cater for workflows where the appraisal needs to be counter-signed by someone other than the appraisee or appraiser.

ollapse All			
			+ Create S
Started			
ode" 😡			Text to Display to User on Submission @
naximum 15 chara STARTED	acters)		appraisal.text.submitReview.BASIC.STARTED
ategory O			E-mails to Send on Submission
Started 💌			1. Select
tatus Description Started	0		Require Signature
ccess Control @			_
Employee	Appraiser	Super-Appraiser	1
◯ No Access ◯ View ● Perform	<ul> <li>No Access</li> <li>View</li> <li>Perform</li> </ul>	<ul> <li>No Access</li> <li>View</li> <li>Perform</li> </ul>	

By default, only Appraisal Administrators can change an appraisee's appraiser or super-appraiser but those involved in the appraisal can be granted permission to do the same under the General tab.

#### Default Template [Preview]

General	Workflow	Ratings	Structure	Target Audience	е			
Template N	ame*							
Default Ter	mplate							
Period Start	t Date							
(not specif	ied)	<b>=</b> 🧷						
Period End	Date							
(not specif	fied)	<b>=</b> 🧷						
Appraisal T	ype							
Annual								
Project	r							
Template S	tatus							
Inactive								
Access to /	Appraisal							
Action	To be the Cli			E	mployee	Appraiser	Super-Appraiser	1
Create App	praisal				7	<b>V</b>		
Change Ap	opraiser				]			
Change Su	uper-Appraise	er						
-								

#### **Involving a Super-Appraiser**

Save

If Super-Appraiser is involved in the workflow of the appraisal, his/her name will be shown on the appraisal landing page as well as the appraisal printed version.

Your Reviewer:	
MOLINA Alon	
Change Reviewer	
Your Super Reviewer	r:
MOLINA Alon (NETD)	MOLINA)
Change Super Review	er

## Selecting a Super-Appraiser

With appropriate permissions and configuration, any user (except the appraisee) of the system can be selected to play the role of "Super-Appraiser" via the appraisee's landing page under **Career Development > Performance Review**. As counter-signing is typically done by the appraiser's appraiser, the default Super-Appraiser prior to starting a new appraisal is the Direct Appraiser of the Direct Appraiser according to system records.

# **Appraisal Status Categories**

With different workflows for different templates, reporting can become difficult if data across multiple appraisal templates is required. Appraisal Status Categories can link statuses in any template such that you can, for example, search for all appraisals currently in a status that is in the "Review" status category.

The Appraisal Status Categories can be accessed via **Manage Center > Talent > Appraisal Manager** > **Appraisal Status Categories**.

Appraisal Manager							
Te	mplates Appraisal Status Catego	Group Email Appraisal Search					
В	ulk Action			+ Create Status			
	Appraisal Status Category	Code	Label Key				
	Started	0	appraisal status started				
-	Pending	3	appraisal.status.pending				
	Review	4	appraisal.status.review				
	Agreed	5	appraisal.status.agreed				
	Completed	1	appraisal status completed				

An Appraisal Status Category will have a code that consists of any string up to a maximum of 15 characters. It can optionally have a label or label key (max 100 characters).

See Configurable Appraisal Workflow for information on where appraisal statuses can be assigned a category.

# **Appraisal Columns**

Past Competencies, Past Achievements, Future Objectives, Career Development and Single Choice sections involve user data entry through fields displayed in a table. The columns that are included in such tables are configurable on a section-by-section basis.

- Where the label key is user definable, administrators may use any heading text (or bundle key) that best suits their purpose for the field.
- Where Allow Copy is available, using copy keys as described previously can allow users to flag entries for copying and then copy them across to the linked Future Objectives section at the click of a button.

Column	Field Type	Appraisal Dimensions	Past Achievements	Past Competencies	Future Objectives	Career Development	Single Choice	Label Key
Objectives	Text Area		Mandatory		Mandatory	Mandatory		User defined
Target Date	Date Selector							User defined
How	Text Area							User defined
Details	Text Area							User defined
Measure	Text Area							User defined
Appraisee Rating	Rating Scale							appraisal.heading.appraiseeRating
Appraiser Rating	Rating Scale							appraisal.heading.appraiserRating
Agreed Rating	Rating Scale							appraisal.heading.agreedRating
Allow Copy	Check Box							User defined
Appraisee Comments	Text Area							heading.appraisal.appraiseeComments
Appraiser Comments	Text Area							heading.appraisal.appraiserComments

# Appraisal Missing Required Fields Flagging

Ratings and Single Choice selections (amongst other fields) are checked for when a performer attempts to submit an appraisal. The example below indicates incomplete fields by using: italics for parts, italics for tabs, a red message, and red asterisks:

1. Past Achievements	2.	Future Planning	$\rightarrow$	3. Sign	Off
Performance Against Objectives Strengths and Areas for Improvement	Performance Assessment Rati	ng			
ur data has been saved. You should now proceed to the next tab or,	if there are no more tabs, th	e next part of the appraisal.			
king into account performance against objectives and feedback from	others, make an assessment	of the employees overall perform	nance over the past 12		
Has exceeded expected performance levels					
Has met in most or all aspects					
Has met in some aspects, fallen short in some aspects					
Has not met expected performance levels					
A: Managing self and personal skills		Employee Rating	Appraiser Rating		Rating
1 - Manage your own resources		Select Level	Select Level	Select Le	evel 💌
Manage your own resources and professional development		Select Level	Select Level	Select Le	evel 💌
3 Develop your personal networks		Select Level 💌	Select Level	Select Le	evel 💌
	Employee Comments	Appraiser Commen	nts N/A Employee Rall	ng Appraiser Rat	ing Agreed
Dimension			123	123	123
Ormension eadership skills					
unmeisium adership skills					
communican actership skills					
Lohn existen adership skills anager's skills			± 123	123	123
adership skills Ianager's skills			E 123	123	123
connenium eadership skills tanager's skills			123	123	123

The appearance of these indicators can be customized in the skin using the following class names:

Label	CSS Class Names
Selected Part	appraisal-part-selected
Completed Part	appraisal-part-completed
Incomplete Part	appraisal-part
Completed Page (Tab)	completed-appraisal-tab
Incomplete Page (Tab)	incomplete-appraisal-tab
Page Complete Message	appraisal-message
Page Incomplete Message	appraisal-warning
Incomplete Asterisk	appraisal-warning

Depending on whether the appraisal is appraisee or appraiser driven and the number of steps in the workflow, the status at which the rating or single choice selection is expected to be made will vary from template to template. In order for the system to execute the appropriate checks at submission then, it is therefore necessary to specify at which status the rating or selection should be completed. For ratings, this is configured in the Ratings tab.

	Rating	Description Key	Explanation Key
	1	Did not meet expectations	Appraisee has failed to meet the objectives
	2	Meets expactions	Appraisse has met the objectives
Disp © I © C Emp Sta	lay Forma cons brop down loyee Rat rted 💌	at n selector ings can only be edited when submitting:	
App Sta	raiser Rati rted 💌	ngs can only be edited when submitting:	
Agre	ed Rating rted 💌	gs can only be edited when submitting:	

For Sinale	Choice sections.	this is	configured	in the	section	itself.
	•					

# Super Reviewer Signing Off Appraisal

## Adding Super Reviewer to the Sign Off Process

It's common for an appraisal to require a third party, like the HR department or the department head, to sign off on it beside the involved manager and direct report, especially if it concerns renumeration changes based on the review process.

In the Sign Off section, it's possible to enable Super Reviewer Acceptance checkbox as well as the Final Comments field for the appraisal.

Sign Off	
Employee's Final Comments	
Reviewer's Final Comments	
Super Reviewer's Final Comments	
	1
Condiance Attitude	
Please record here the extent to which the individual has understood and complied with all applicable laws, rules, and regulations. Please indicate the individual's general attitude toward in	compliance.
Separate career development dialogue required	
Reviewer Acceptance	
Super Reviewer Acceptance	

With the super reviewer being able to sign off an appraisal, it adds value to show who is the super reviewer in the administrative appraisal search screen.

#### Appraisal Manager

Templates	Status Category	Group E-mail	Appraisal Search	1					
Appraisal T	emplate	Status Category		Employee La	st Name	Employee First Name			
All	•	AJI	*						
Appraisal st	tarted from	То		Appraisal com	pleted from	То			
Date	<b>m</b>	Date	<b></b>	Date	<b>m</b>	Date	Ê		
Search Results 1 - 20 Bulk Action	of 28  Employee		Appraisal		Reviewer			Super Reviewer	Created On
	DUULADING HURland (D	100.4700	Assession	25444	DEEDICE DEADING	(DECIME)		ppopp have concern	hun E. 2014
	BHILARYF DHilaryG (B	HILARY)	Appraisal	_35tep	BFENGE DEengG	(BEENG)		BROBF DRODG (BROB)	Jun 5, 2014 -
•	BMICHEALF BMicheal	G (BMICHEAL)	Appraisal	3Step	BFENGF bFengG	i (BFENG)		BROBF bRobG (BROB)	Jun 5, 2014
•	BSAM bSamG (BSAM)		Appraisal	3Step	BFENGF bFengG	i (BFENG)		BROBF bRobG (BROB)	Jun 5, 2014
•	ORG1_121F Org1_121	G (ORG1_121)	Copy test		ORG1_120F Org	1_120G (ORG1_120)		ORG1_100F Org1_100G (ORG1_100)	Apr 29, 2014

Also, appraisal reporting in the Report Wizard supports the new Acceptance and Final Comments fields by the super reviewer as well as the Appraisee Right to Reply comment for reporting.

erties Columns Grouping Order Filters	Summary	
	second y	
Save Undo		
ct the columns you wish to include in your report.		
xpand All		
User Properties		
Business Unit Details		
Organization Attributes		
User Appraisal Properties		
👽 Appraisal Template Name	Average Goal Rating	Sign Off Appraiser Comments
🔽 Appraisee Reply	Average Objective Rating	Sign Off Career Development Dialogue
📄 Appraiser First Name	Completed Date	Sign Off Compliance Attitude
Appraiser Last Name	Created Date	Sign Off Super Appraiser Acceptance
Appraiser User ID	V Overall Rating	Sign Off Super Appraiser Comments
Average Appraisal Dimensions Rating	Sign Off Appraisee Comments	Sign off Appraisee Acceptance

## Manual Appraisal Status Change Notification

Email templates can be set up for the scenario of an administrator manually changes an appraisal status. On the particular status that the appraisal gets changed to, if it's been configured with a notification email then the concerned users would be receiving an email about the status change.

Appraisal [ Preview ]

Collapse All					
Started					
Code* 🔞			Text to Display to User on Submission @		
maximum 85 char STARTED	acters)		Click Submit to proceed to the next stage of this appraisal.		
Category 🚱 None 🔹					
Status Description @			E-mails to Send on Submission @ 1. SUBMIT PENDING APPRAISAL =		
			2. Otiett		
			E-mails to Send on Reverting to this Status by Administrator @ 1. Select 2. Select		
Access control 🔞			E-mails to Send on Reverting to this Status by Administrator @ 1. Select 2. Select @ Require Signature @		
Access control @	Reviewer	Super-Reviewer	E-mails to Send on Reverting to this Status by Administrator @ 1. Select 2. Select @ Require Signature @		

# **Performance Appraisals**

Appraisal fields can be set to Mandatory/Optional in an appraisal template. Now it would be possible to turn a field on but specify that filling it in is optional.

### **Specifying Fields as Optional in Appraisals**

The new "Mandatory" configuration is added per field. The configuration is active depending on whether or not the field itself has been enabled. When Not Applicable has been enabled, users who have checked the Not Applicable checkbox will not be required to fill out the field even if it has been configured as Mandatory.

The list of fields with Mandatory/Optional configuration added:

#### **PAST ACHIEVEMENTS**

- (Objectives)
- Target Date
- How
- Details

Objectives       Image: Comparised of the section of th	Input	Label Key	Locale Formatted Label	Enable	Mandatory 😯
Target Date       Image: Comparised	Objectives			$\checkmark$	
How Image: set of the se	Target Date			<b>V</b>	
Details Image: Composition of the system of the syst	How			<b>V</b>	
Not Applicable appraisal.heading.NA       Not Applicable       Imployee Rating         Employee Rating       Employee Rating       Imployee Rating         Reviewer Rating       Reviewer Rating       Imployee Rating         Agreed Rating       Agreed Rating       Imployee Rating         Allow copy       Imployee Rating       Imployee Rating         Automatic Copy       Imployee Rating       Imployee Rating	Details			<b>V</b>	
Employee Rating Employee Rating   Reviewer Rating Reviewer Rating   Agreed Rating Agreed Rating   Allow copy Image: Copy	Not Applicable	appraisal.heading.NA	Not Applicable	<b>V</b>	
Reviewer Rating     Reviewer Rating       Agreed Rating     Agreed Rating       Allow copy     Image: Copy	Employee Rating		Employee Rating		~
Agreed Rating Agreed Rating Allow copy Allow copy Automatic Copy	Reviewer Rating		Reviewer Rating		~
Allow copy	Agreed Rating		Agreed Rating		~
Automatic Copy	Allow copy				
	Automatic	: Сору			
	(none) 👻				

 $\fbox$  Hide rating until this section has been rated by both parties

## APPRAISAL_DIMENSIONS

- Employee Comments
- Reviewer Comments

Input	Label Key	Locale Formatted Label	Enable	Mandatory 😯
Employee Comments	heading.appraisal.appraiseeComments	Employee Comments	<b>V</b>	
Reviewer Comments	heading.appraisal.reviewerComments	Reviewer Comments	<b>V</b>	
Not Applicable		Not Applicable		
Employee Rating		Employee Rating		~
Reviewer Rating		Reviewer Rating		~
Agreed Rating		Agreed Rating		~
Hide rating until this	section has been rated by both parties			
Rating Summary				
None 💌				
Rating Summary Labe	l Key			

# PAST_COMPETENCY

- Employee Comments
- Reviewer Comments
- Need to add a Rating N/A
| Input                | Label Key                           | Locale Formatted<br>Label | Enable   | Mandatory 😯 |
|----------------------|-------------------------------------|---------------------------|----------|-------------|
| Employee<br>Comments | heading.appraisal.appraiseeComments | Employee Comments         | <b>V</b> |             |
| Reviewer Comments    | heading.appraisal.reviewerComments  | Reviewer Comments         | <b>V</b> |             |
| Not Applicable       | appraisal.heading.NA                | Not Applicable            | <b>V</b> |             |
| Employee Rating      | appraisal.heading.appraiseeRating   | Employee Rating           | <b>V</b> | ~           |
| Reviewer Rating      | appraisal.heading.reviewerRating    | Reviewer Rating           | <b>v</b> | ~           |
| Agreed Rating        | appraisal.heading.agreedRating      | Agreed Rating             | <b>V</b> | ~           |
| Allow copy           |                                     | ]                         |          |             |
| Rating Summary       | л                                   |                           |          |             |
| None                 |                                     |                           |          |             |

# CAREER_DEVELOPMENT

- (Objectives) How
- Details
- Measure
- Target Date

Input	Label Key	Locale Formatted Label	Enable	Mandatory
Objectives			1	
How			✓	
Details			✓	
Measure			✓	
Target Date			<b>V</b>	

Career Development Intervals

# FREE_TEXT

Input

Input Type	Mandatory
Text Field 💌	
Allow copy	

## LEARNING_PATH None

# FUTURE_OBJECTIVES

• (Objectives)

- Target Date
- How
- Details

Input	Label Key	Locale Formatted Label	Enable	Mandatory
Objectives			$\checkmark$	
Target Date			<b>V</b>	
How				
Details			<b>V</b>	
Allow cop	У			

## RATING_SUMMARY

None

#### SINGLE_CHOICE

• Input

DISPLAY			
Display in summary None			
Mandatory	]		
Single-Choice Options			
Delete Label Key			
Hide rating until this section has	is been rated by both parties		

#### TRAINING_HISTORY

None

## SIGN_OFF

- Employee Comments
- Reviewer Comments
- Super Reviewer Comments
- Employee Acceptance
- Reviewer Acceptance
- Super Reviewer Acceptance
- Compliance Attitude
- Career Development Dialogue

Display field	Enable	Mandatory
Display employee comments	<b>V</b>	
Display reviewer comments	<b>V</b>	
Display super reviewer comments		
Display employee acceptance	<b>V</b>	
Display reviewer acceptance	<b>V</b>	
Display super reviewer acceptance		
Display compliance attitude		
Display career development dialogue		
Display right-to-reply (will be displayed on a separate page)		~

# RIGHT_TO_REPLY

None

## PROBATIONARY_SIGN_OFF

None

## GOAL_RESULTS

- Employee Comments
- Reviewer Comments

Input	Label Key	Locale Formatted Label	Enable	Mandatory
Employee Comments	heading.appraisal.appraiseeComments	Employee Comments	<b>v</b>	
Reviewer Comments	heading.appraisal.reviewerComments	Reviewer Comments	<b>V</b>	
Employee Rating		Employee Rating		~
Reviewer Rating		Reviewer Rating		~
Agreed Rating		Agreed Rating		~
Hide rating until this	section has been rated by both parties			
Rating Summary				
None 💌				
Rating Summary Labe	l Key			

PERFORMANCE_GOAL_PLAN None

DEVELOPMENT_GOAL_PLAN None

# SUCCESSION_PLANNING None

After the setup of the appraisal, the appraisal fields generated will be based on the configuration. This affects the validation on clicking save and attempting to submit appraisal.