



NetDimensions LMS

15.1

# Team Review

An overview of the features and procedures  
relevant to Team Review in  
PeopleFluent Learning NetDimensions LMS Version 15.1

## Document Information

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Document ID: EN15112

Document Title: NetDimensions LMS 15.1 - Team Review

Document Version: 1.0

Document Date: January 2020

This document may be revised from time to time.

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## Introduction

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This document provides an overview of Team Review features that are typically accessed through the Workspace menu item. These include:

- Review
- Supervisor Assessments
- Review Enrollments
- Integrated User Calendar
- Competency Assessments
- Task Approval
- Enrollment Approval
- Withdrawal Approval
- External Training Approval
- Certification Approval
- Appraisal Review
- Enrollment Wizard
- Compliance Analysis



## Review

(Available for Performance, Learning, and eLearning only)

Reviewers can see the list of individuals at Workspace > Review where all visible users are categorized into three tabs:

1. Direct Appraiser Review, which lists all users who have the reviewer assigned as the direct appraiser
2. Assigned Group Review, which lists all users who are members of user groups that are supervised by the reviewer
3. Organization Review, which lists all visible users

From these screens, you can

1. Filter the list of users (by organization, Job Title, First Name, or Last Name)
2. Show/Hide filter panel
3. Review an individual's Employee Profile
4. Review an individual's Learning Center
5. Review an individual's Career Center
6. View assigned Job Profiles per user
7. Review status of Job Profiles, Competencies, and Training
8. Access actions for individuals
9. Apply bulk actions across selected individuals

NetDimensions Talent Suite

Alex Parker | Help | Contact Us | Logout

Home | Learning Center | Personal Calendar | Career Center | Workspace | Connect | Reports | Teach

Review

Direct Appraiser Review | Assigned group review | Organization Review

Organization: Click to select | Job Title: All Job Titles | First Name: | Last Name: | Show learners with closed a... | Filter

Showing: 1 - 3 of 3

Bulk Action | Results per Page: 25

Name	Job Profiles	Actions
Barry Singer United Kingdom	Manager	Profile   Learning   Career   Actions
Carrie Law Hong Kong	Manager	Profile   Learning   Career   Actions
David Bradshaw United States	Manager	Profile   Learning   Career   Actions

Showing: 1 - 3 of 3

## Actions for Individuals

Depending on access controls, the individual actions available under the cog are:

1. Review Employee Profile
2. Review Learning Center
3. Review Career Center
4. Review Enrollments
5. Deploy Assessment
6. Assign Performance Goal
7. Assign Development Goal
8. Assign competency
9. Assign learning module

## Bulk Actions

Depending on access controls the bulk actions available under the drop down are:

1. Review Enrollments
2. Deploy Assessment
3. Assign Performance Goal
4. Assign Development Goal
5. Assign competency
6. Plot 9-box Promotion Potential Report
7. Plot 9-box Retention Risk Report
8. Enrollment Requests History

## Job Profile, Competency, and Training Statuses

Individuals are listed with Job Profile / Competency / and Learning Statuses:

### Review

The screenshot displays the 'Review' section of the NetDimensions LMS interface. At the top, there are tabs for 'Direct Appraiser Review', 'Assigned Group Review', and 'Organization Review'. Below these, a 'Bulk Action' dropdown is visible. The main content area shows the profile of 'MACOMBER John' with the status 'UNASSIGNED'. Under 'Job Profiles', 'Product Management' is listed. A tree view shows 'Required Competencies (3)':

- 1. Programme management - Level 7 (Required Level 7)
  - Required Learning Modules (2)
    - Design Pattern (Grace Period)
    - Project Management
- 2. Programming/software development - Level 4 (Required Level 5)
  - Required Learning Modules (1)
    - Java Programming
  - Optional Learning Modules (1 required of 2)
    - HTML
    - JQuery
- 3. Quality management - Level 7 (Required Level 5)
  - Required Learning Modules (1)
    - JUnit Test

Three callout boxes explain the status indicators:


- Yellow box:** The indicator is used to indicate the job profile or competency or module is in the grace period (points to the orange circle next to 'Design Pattern').
- Red box:** The indicator is used to indicate the job profile or competency or module is not completed (points to the red triangle next to 'Programming/software development').
- Green box:** The indicator is used to indicate the job profile or competency or module is completed (points to the green checkmark next to 'JUnit Test').

✓ Complete indicator

- Learning module: indicate the learning module is completed
- Competency: indicate all the required modules are completed
- Job profile: indicate all the required competencies are awarded

#### **Incomplete** indicator

- Learning module: indicate the learning module is not completed
- Competency: indicate all the required modules either are not completed or not meet the requirement.
- Job profile: indicate all the required competencies are not awarded

 **Grace period** indicator: An amber circle will be shown beside a learning module and the related competencies and job profiles if a user is within a reminder period to retake a learning module before it expires:

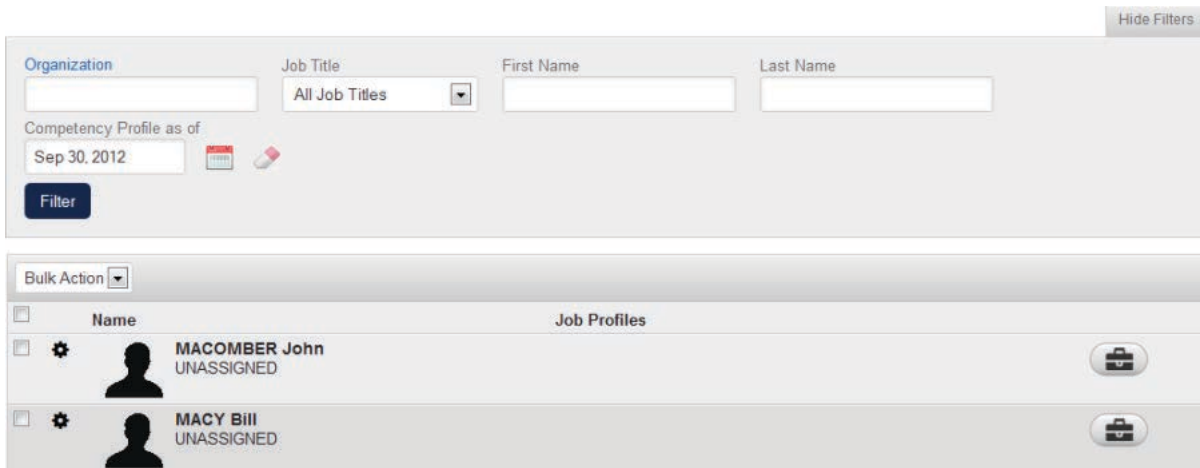
- Learning module: if the new released revision of the learning module is not completed, the learning module will be indicated as in the grace period.
- Competency: if all the required modules are completed but one of the required modules has a new revision released, the competency will be indicated as in the grace period.
- Job profile: if all the required competencies are awarded but one of the required competencies is in the grace period, the job profile will be indicated as in the grace period

## Competency Profile as of

If you want to view the competency profiles as of a specific date, you can use the date selector in "Filters" section. For example, take the following scenario:

1. Bill Macy was assigned the Job Profiles on Oct 1, 2012
2. Bill Macy enrolled on the learning module "SQL" on Oct 21, 2012
3. Bill Macy completed the "SQL" module on Oct 22, 2012

Competency Profile as of September 30, 2012 will list Bill Macy with no job profiles because they are not assigned until Oct 1, 2012:



Hide Filters







Organization Job Title First Name Last Name

Competency Profile as of

Sep 30, 2012

Filter



Bulk Action

	Name	Job Profiles
	 <b>MACOMBER John</b> UNASSIGNED	
	 <b>MACY Bill</b> UNASSIGNED	








Competency Profile as of October 21, 2012 list Bill Macy with an "Incomplete" status for the "SQL" learning module:

Hide Filters







Organization  Job Title  First Name  Last Name

Competency Profile as of   

Bulk Action

<input type="checkbox"/>	Name	Job Profiles	
<input type="checkbox"/>	 <b>MACOMBER John</b> UNASSIGNED	 Product Management	
<input type="checkbox"/>	 <b>MACY Bill</b> UNASSIGNED	 Database Administrator  Software Engineer	



**Job Profiles (2)**

-  Database Administrator
  - Required Competencies (2)**
    -  Database administration (Required Level 5)
    -  Database/repository design (Required Level 6)
      - Required Learning Modules (2)**
        -  Oracle Database
        -  SQL
  -  Software Engineer








Competency Profile as of October 22, 2012 will list Bill Macy with a "Complete" status for "SQL":

Hide Filters







Organization  Job Title  First Name  Last Name

Competency Profile as of   

Bulk Action

<input type="checkbox"/>	Name	Job Profiles	
<input type="checkbox"/>	 <b>MACOMBER John</b> UNASSIGNED	 Product Management	
<input type="checkbox"/>	 <b>MACY Bill</b> UNASSIGNED	 Database Administrator  Software Engineer	

**Job Profiles (2)**

-  Database Administrator
  - Required Competencies (2)**
    -  Database administration (Required Level 5)
    -  Database/repository design (Required Level 6)
      - Required Learning Modules (2)**
        -  Oracle Database
        -  SQL
    -  Software Engineer

## Enrollment Requests History

Enrollment requests can be displayed for selected users. These can be filtered by Overall Status:

## Enrollment Requests History

Overall Status

All  
 Approval Denied  
 Approved  
 Pending Approval  
 Waitlisted

N	am/Module	Learning Type	Date	Final Status
SANTIAGO Claire	English1 Copy (11111_1)	Classroom	Sep 23, 2013 9:00 AM - Sep 24, 2013 2:00 PM GMT+08:00	Pending Approval

Back

## Assigning Competency

(Available for Performance and Learning only)

A Manager can assign competencies to an individual or a group of employees through the review page.

1. At Workspace > Review, click Assign Competency under the individual cog or select individuals and use the Bulk Action

Home | Learning Center | Career Center | Workspace | Connect | Reports | Teach

Award Competencies for STUDENT New, DELEON Henry, CRUZ John, YODICO Meldy, CHAVEZ Ester

Competencies

Select Competency Model: All

Name		Select Level	Select
Lathe Operations		Select Level	<input type="radio"/>
Training Competency		Select Level	<input checked="" type="radio"/>
Facilitating Change	Facilitating Change	Select Level	<input type="radio"/>
Systems integration	The incremental and logical integration and testing of components and/or subsystems and their interfaces in order to create operational services.	Select Level	<input type="radio"/>
Systems installation/decommissioning	The installation, testing, implementation or decommissioning and removal of cabling, wiring, equipment, hardware and appropriate software, following plans and instructions and in accordance with agreed standards. The testing of hardware and software components, resolving malfunctions found and recording the results. The reporting of details of hardware and software installed so that configuration management records can be updated.	Select Level	<input type="radio"/>

Back Save

2. From here, select the competency you to want assign to the selected participants. You have an option to select the competency model you want to display by clicking the *Select Competency Model* drop down button. To select, tick the radio button ( located on the last column of the table) of the competency you want to assign. Once competency is selected, you will be asked to select the level.
3. Select the **Level** by pointing to the level number of level description. Once level is selected, the menu will be closed and display the selected



**Select a level**

**Systems integration**  
The incremental and logical integration and testing of components and/or subsystems and their interfaces in order to create operational services.

Level	Description
1	Does not meet any criteria
2	Produces software builds from software source code. Conducts tests as defined in an integration test specification, records the details of any failures, and carries out fault diagnosis relating to simple failures, reporting the results of the diagnosis in a clear and concise manner.
3	Defines the integration build and produces a build definition for generation of the software. Accepts software modules from software developers, and produces software builds for loading onto the target hardware from software source code. Configures the hardware environment, produces integration test specifications, conducts tests and records the details of any failures. Carries out and reports fault diagnosis relating to moderately complex problems.
4	Defines the integration build, accepts software modules from software developers, and produces software builds for loading onto the target environment. Configures the hardware environment, produces integration test specifications, and conducts tests, recording details of any failures and carrying out fault diagnosis.
5	Designs and builds integration components and interfaces. Leads practical integration work under the technical direction of the system /service designer. May contribute to the overall design of the service. May define the technical criteria for product/component selection. Contributes to decisions about tools, methods and approaches.
6	Establishes standards and procedures across the IT service lifecycle (including the development lifecycle) in the areas of systems integration and testing and ensures that practitioners adhere to them. Manages resources to ensure that the systems integration function operates effectively.

Back Save

4. After selecting the competency and level, click the **Save** button to keep the changes.

Award Competencies for STUDENT New, DELEON Henry, CRUZ John, YODICO Meldy, CHAVEZ Ester

**Competencies**

Select Competency Model: All

Name	Description	Select Level	Select
Lathe Operations		Select Level	<input type="radio"/>
Training Competency		Select Level	<input type="radio"/>
Facilitating Change	Facilitating Change	Select Level	<input type="radio"/>
Systems integration	The incremental and logical integration and testing of components and/or subsystems and their interfaces in order to create operational services.	Level 3	<input checked="" type="radio"/>
Systems installation/decommissioning	The installation, testing, implementation or decommissioning and removal of cabling, wiring, equipment, hardware and appropriate software, following plans and instructions and in accordance with agreed standards. The testing of hardware and software components, resolving malfunctions found and recording the results. The reporting of details of hardware and software installed so that configuration management records can be updated.	Select Level	<input type="radio"/>

Back Save

## 9-box Reports

(Available for Performance only)

Effective succession planning should take into account both the work performance and promotion potential of employees. The **9-box Report** is designed to provide a visual representation of these two different measures, revealing the suitability of a set of employees for more senior roles. It aims to help managers make more informed succession decisions and identify high potential performers for future promotions.

The 9-Box Report only plots the selected employees who have completed an appraisal with both

performance and potential scores. If an employee has completed multiple appraisals before, only the latest one will be retrieved for analysis, regardless of the appraisal template.

- Only those appraisals that have sections with ratings (i.e. *Past Achievements*, *Appraisal Dimensions*, *Goal Results*, or *Competencies*) would have performance scores.
- Only those appraisals with promotion potential questions in the *Succession Planning* section would have potential scores. Only those questions of the promotion potential type will be involved in the calculation of the potential scores.
- The latest appraisal means an employee's appraisal with the latest completion date among all appraisals of this employee with both performance scores and potential scores.

While the performance score is gathered from the four appraisal section types with ratings (i.e. *Past Achievements*, *Appraisal Dimensions*, *Goal Results*, and *Competencies*), the potential score is gathered from the *Succession Planning* section. For performance scores, the *Agreed Rating* is preferred and the *Appraiser Rating* will be used if the former is not applicable. All the four section types could be configured to have different *Rating Scales*. In particular, the *Competencies* section could be configured to rate by either *Rating Scale* or *Competency Proficiency Level*.

As different rating scales may possibly be used in different appraisals/sections, the overall performance and potential scores would be normalized using the formula below:

- Normalized scores = Total scores – Minimum scores
- Maximum scores – Minimum scores X 100%

To deploy 9-box reports, users must have "Allow 9-Box Report Deployment" Role Access Control set to "Yes".

### Plot 9-Box Promotion Potential Report

On the Review screen (regardless whether Direct Appraiser Review, Assign Group Review, or Organization Review screen), tick the box of the participants to whom the competency will be assigned.

#### Review

Direct Appraiser Review Assigned Group Review Organization Review

Show Filters

Bulk Action Results per page: 25

	Name	Job Profiles
<input checked="" type="checkbox"/>	CHAVEZ Ester UNASSIGNED	
<input checked="" type="checkbox"/>	CRUZ John UNASSIGNED	
<input checked="" type="checkbox"/>	DELEON Henry UNASSIGNED	
<input checked="" type="checkbox"/>	STUDENT New Finance	▲ CNC Lathe Operator
<input checked="" type="checkbox"/>	YODICO Meldy UNASSIGNED	

Showing: 1 - 5 of 5

Click the Bulk Action dropdown button, and select the Plot 9- box Retention Potential Report option.

## Review

Direct Appraiser Review Assigned group review Organization Review

Show filters

Results per Page: 25

**Bulk Action**

- Deploy Assessment
- Assign goal
- Assign competency
- Plot 9-box Promotion Potential Report
- Plot 9-box Retention Risk Report
- Enrollment Requests History

☐ **SANTIAGO Claire**  
CBA

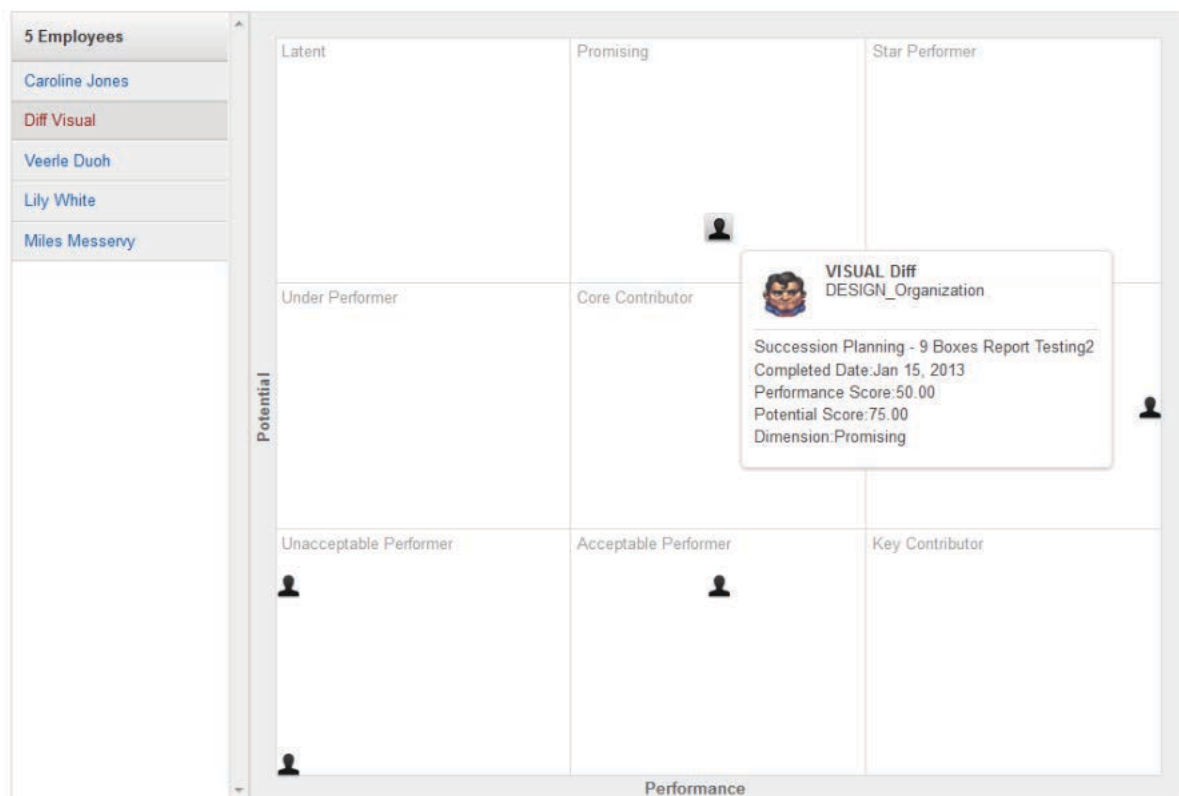
**Job Profiles**

- ✓ New Job Profile1
- ✓ New Job Profile1

Showing: 1 - 2 of 2

This opens the *9-Box Promotion Potential Report* screen.

## 9-Box Report



The *9-Box Report* consists of two parts. The left part lists the selected employees. Highlighting an employee will show the detailed information of the employee on the right part. Detailed information includes employee's basic information, appraisal template title and appraisal completion date with the performance and potential scores gathered from the user's appraisal. In the plot, each employee falls into one of the 9 boxes, which represents the employee's performer type. The two figures below respectively highlight the 9 performer types and presents a sample *9-Box Report*.

Optionally filter the results using the following criteria:

- **Appraisal Template filter** : to specify users that have completed a particular appraisal template.
- **Number of Appraisals filter** : to specify the number of users' appraisals that will be used to visualize the growth of selected users

## 9-Box Promotion Potential Report

Appraisal Template
Number of Appraisals

Nine Box Report - Potential

All
Nine Box Report - Potential Report (1)
Nine Box Report - Potential Report (3)

Latest Appraisal

0 Employees

Latent	Promising	Star Performer

To zoom in the 9-box Reports, click the zoom in button.

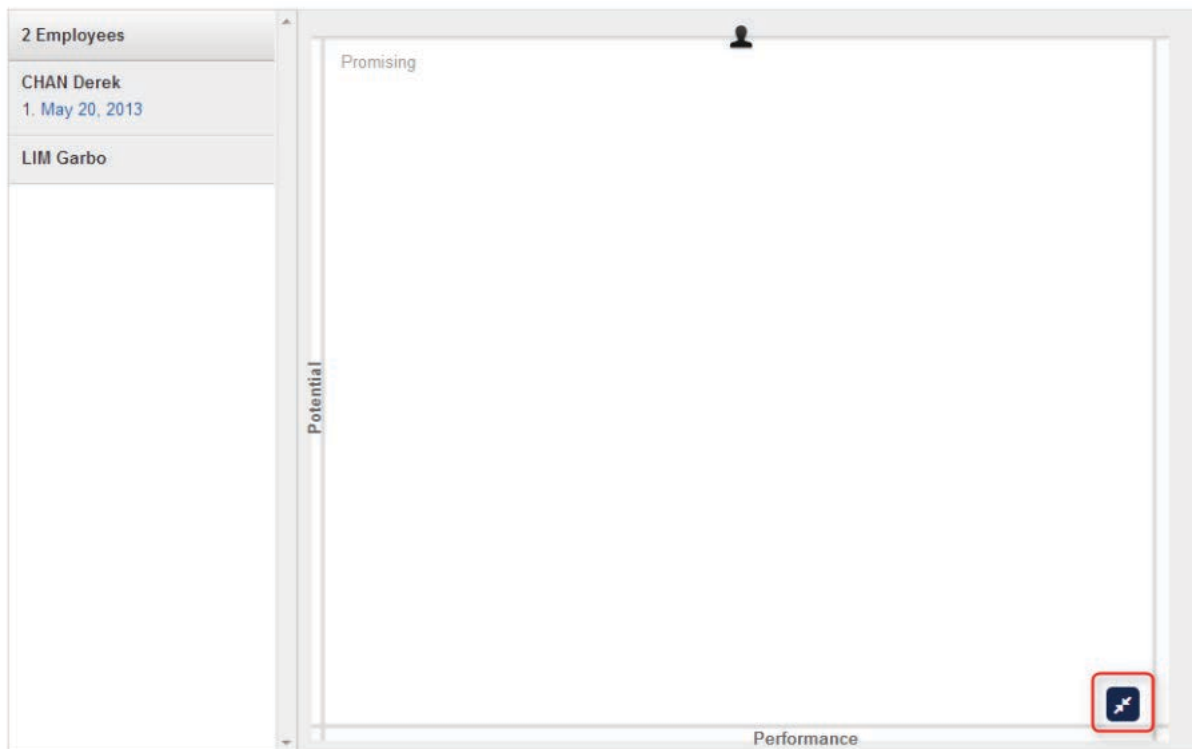
2 Employees

CHAN Derek  
1. May 20, 2013

LIM Garbo  
1. May 20, 2013

Latent	Promising	Star Performer
Under Performer	Core Contributor	Strong Performer
Unacceptable Performer	Acceptable Performer	Key Contributor

Potential
Performance



### Plot 9-box Retention Risk Report to Review Bulk Action

In order to allow reviewers to compare retention risk scores collated through the appraisal succession plan sections for a given set of users, use the bulk action *"Plot 9-box Retention Risk Report"*. Similar to the 9-box Promotion Potential Report, Reviewers can now select a set of users and then generate 9-box Retention Risk Report.

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[Career Center](#)
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## Review

[Direct Appraiser Review](#)
[Assigned group review](#)
[Organization Review](#)

Bulk Action	Job Profiles
<div> <div> <input type="checkbox"/> </div> <div> </div> <div> </div> </div> <div> <div>UNASSIGNED</div> </div>	<div> <div>✓</div> <div>Job Profile Two</div> </div>
<div> <div> <input checked="" type="checkbox"/> </div> <div> </div> <div> </div> </div> <div> <div>TWO User</div> <div>UNASSIGNED</div> </div>	<div> <div>✓</div> <div>Job Profile One</div> </div> <div> <div>▲</div> <div>Job Profile Two</div> </div>
<div> <div> <input checked="" type="checkbox"/> </div> <div> </div> <div> </div> </div> <div> <div>TWO User</div> <div>UNASSIGNED</div> </div>	<div> <div>▲</div> <div>Job Profile One</div> </div>

Showing: 1 - 3 of 3



# Supervisor Assessments

(Available for Performance and Learning only)

Workspace > Supervisor Assessments lets you assess the learner's performance after completing on the job training:

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Home Learning Center Personal Calendar Career Center Workspace Connects Reports Teach

---

## Supervisor Assessments

### Supervisor Assessments

Participant Name/ID:  Assessment Status:  Learning Status:

[Filter](#) [Reset](#)

Results per Page:

Showing: 1 - 10 of 24

Participant	Module Name	Supervisor Assessment	Assessment Status
ADMIN Admin (NETD_GREENWELL)	Robert's On-the-Job Training	Product Management Test (SA1) Multi-Language	Completed and Graded
LEARNER Ali (ALILEARNER)	Sample OJT with Evidence	Assessment: Technician with Evidence (TECHNICIANS-9724215) Multi-Language	Incomplete
ADAMS Cat (ZCORD_CAT)	On-The-Job Training 10.0	Mobile Access Supervisor Assessment (MASA) (MASA) Multi-Language	
ADAMS Cat (ZCORD_CAT)	Robert's On-the-Job Training	Product Management Test (SA1) Multi-Language	Completed and Graded
LEARNER Garfield (GARFIELDLEARNER)	Sample OJT with Evidence	Assessment: Technician with Evidence (TECHNICIANS-9724215) Multi-Language	Incomplete
ADAMS Jane (NETD_AIKA)	Robert's On-the-Job Training	Product Management Test (SA1) Multi-Language	Completed and Graded
ANG Janelle (NETD_JAM)	test	New Exam (SUPERVISOR) Multi-Language	Completed and Graded
ANG Janelle (NETD_JAM)	no title	Assessment on a doctor (DOCTORSA) Multi-Language	
ANGS janelles (NETD_JANELLES)	no title	Assessment on a doctor (DOCTORSA) Multi-Language	
ADMIN New (NDADMIN1)	Robert's On-the-Job Training	Product Management Test (SA1) Multi-Language	Incomplete

Showing: 1 - 10 of 24

### Supervisor Assessments in Assessment Workflows

Participant Name/ID:  Assessment Status:  Learning Status:

[Filter](#) [Reset](#)

Results per Page:

Showing: 0 - 0 of 0

Participant	Module Name	Assigned assessment	Assessment Status
There is no assessment for you to carry out.			

Showing: 0 - 0 of 0

NetDimensions

You can launch an assessment by clicking on the Supervisor Assessment title.

## Review Enrollments

At Workspace > Review Enrollments, you can review transcripts across your teams. From this screen you can:

1. Apply filters, including creating and managing Presets
2. View the transcript
3. Select Session for the Learner
4. Send E-mail to selected Learners

**Review Enrollment**

1. **Preset Filters** [Manage] **Organization** **First Name** **Last Name**

No Preset Specified Click to select

Status Type Training undertaken between And

All All e.g Nov 30, 2017 e.g Nov 30, 2017

Module Parent Program

Select Learners 1 selected

Barry Singer (BARRY.SINGER) Search for a user

Filter Reset Save as Preset

Showing: 1 - 4 of 4

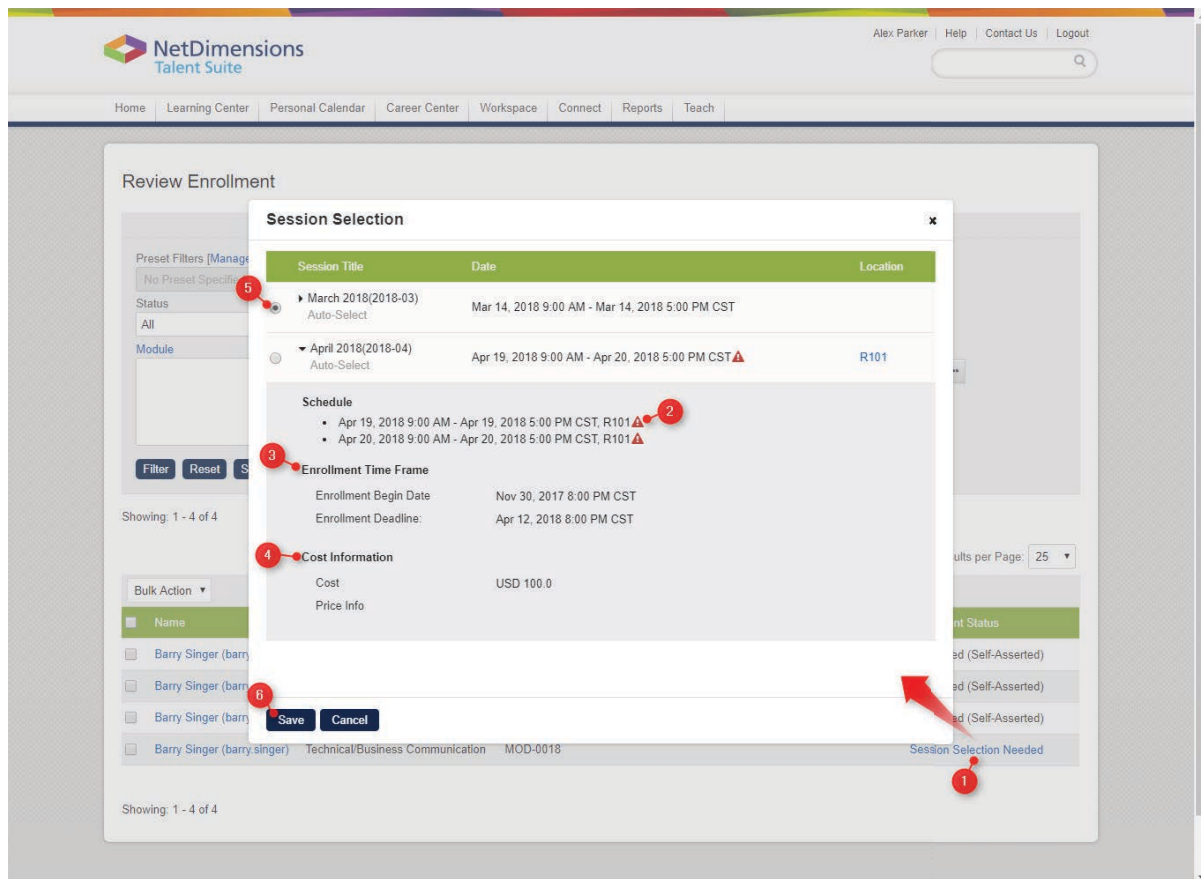
Results per Page: 25

4. Bulk Action Send Mail

	Training Title	Training Code	Start Date	End Date	Venue	Parent Program Title	Enrollment Status
<input type="checkbox"/> Barry Singer (barry.singer)	Motivating Your Team	MOD-0043					Completed (Self-Asserted)
<input type="checkbox"/> Barry Singer (barry.singer)	Appraisals and Reviews	MOD-0045					Completed (Self-Asserted)
<input type="checkbox"/> Barry Singer (barry.singer)	Communications	MOD-0041					Completed (Self-Asserted)
<input type="checkbox"/> Barry Singer (barry.singer)	Technical/Business Communication	MOD-0018					Session Selection Needed

Showing: 1 - 4 of 4

## Selecting Sessions



To select a session for a learner

1. Click on "Session Selection Needed"
2. Take note of Scheduling Conflict indicators
3. Take note of Enrollment Period
4. Take note of Cost Information
5. Select the appropriate Session
6. Click Save

# Competency Assessments

---

(Available for Performance only)

## Deploying Competency Assessments

To deploy an assessment:

1. Go to Workspace > Review
2. Click "Deploy Assessment" under the individual cogs or select multiple individuals and use the bulk action drop down. The Competency Assessment Wizard appears.

### Competency Assessment Wizard

Assessment Template Reviewers

Available Templates

Assessment Template 1

Assessment Template 1

Next Cancel

3. Select the assessment template you want to use, then click **Next**.
4. The screen refreshes and displays the **Reviewers** tab.



## Competency Assessment Wizard

Assessment Template Reviewers Competencies

Primary Reviewer

MOLINA Alon (NETDALON) [Change](#)

Due: ☒ 30 Days from Assignment



☐ Date: (not specified)  

Weight ratio:

Self Review

☒ Allow Self Review

Due: ☒ 30 Days from Assignment

☐ Date: (not specified)  

Weight ratio:

Employee

[Select All](#)



SANTOS Vina (EMPNO005)

Secondary Reviewers

[Peer](#) [Subordinate](#) [Manager](#)


Number of Reviewers: 1

Due: ☒ 30 Days from Assignment

☐ Date: (not specified)  

Weight ratio:

0 selected



[Back](#) [Next](#) [Cancel](#)



5. If users want to add a secondary reviewer, click the **AddReviewers** link, then click **Next**

Secondary Reviewers

[Peer](#) [Subordinate](#) [Manager](#)


Number of Reviewers: 1


Due: ☒ 30 Days from Assignment

☐ Date: (not specified)  

Weight ratio:

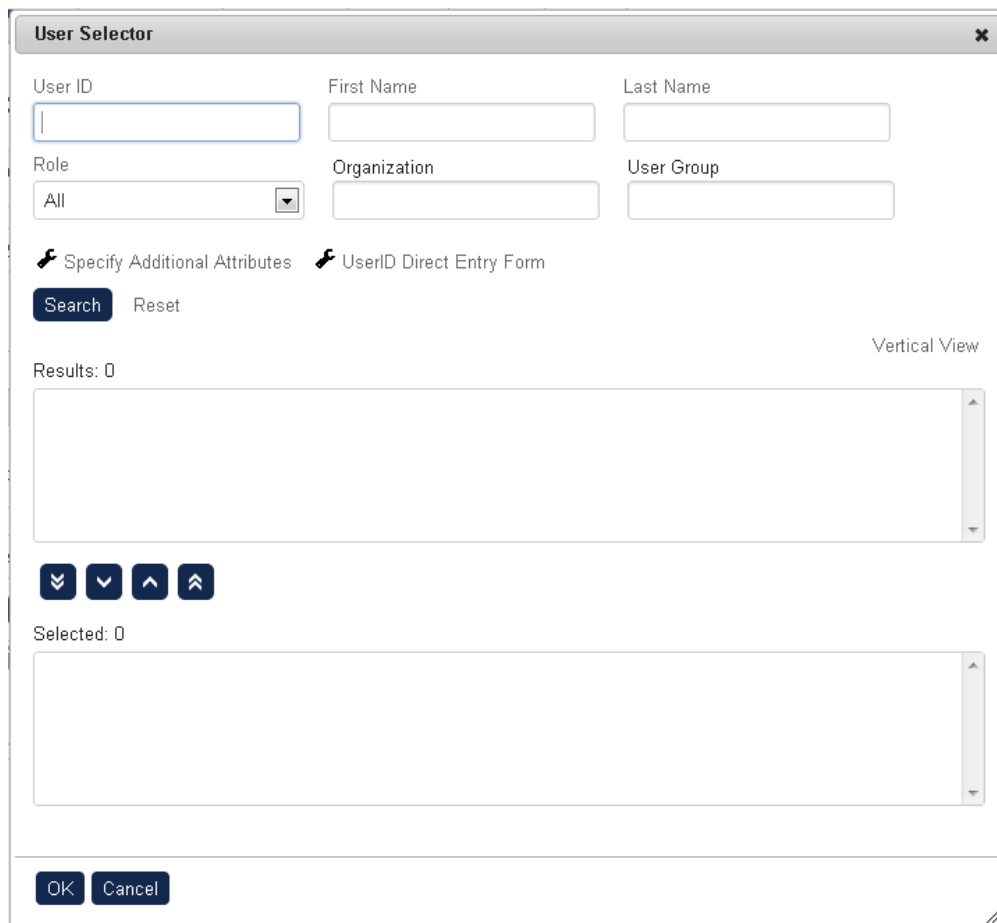
1 selected

STUDENT New (EMPNO003) 



6. On this screen, you can review the list of reviewers and reviewees. For secondary reviewers they cannot be the same person as the primary reviewer. In addition to this, the number of secondary reviewers must be the same number specified in the assessment template. Users can also 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.





**User Selector**

User ID:  First Name:  Last Name:

Role:  Organization:  User Group:

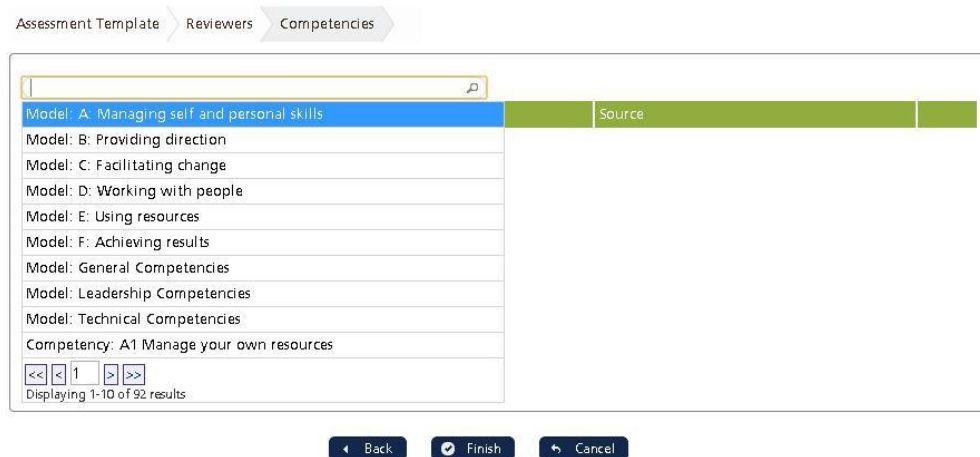
Specify Additional Attributes UserID Direct Entry Form

Results: 0 Vertical View

Selected: 0

7. Select the competency model you want to use. The user can remove any user selection with the cross on the right-hand side.

### Competency Assessment Wizard



Assessment Template > Reviewers > **Competencies**

Model: A: Managing self and personal skills	Source
Model: B: Providing direction	
Model: C: Facilitating change	
Model: D: Working with people	
Model: E: Using resources	
Model: F: Achieving results	
Model: General Competencies	
Model: Leadership Competencies	
Model: Technical Competencies	
Competency: A1 Manage your own resources	

8. The screen refreshes back to the **Competencies** tab, which now lists the competencies on the screen. You can remove the competency that you don't want to be part of your assessment by clicking the remove button located at the end of the column.

## Competency Assessment Wizard

Assessment Template Reviewers Competencies

Competency	Source	
Action Management	---	
Building Relationships	---	
Business Execution	---	
Effective Working	---	
Establish Lifetime Customer Relationships	---	
Financial Management	---	
Initiative	---	
People Management	---	
Strategic Thinking	---	
Values and Ethics	---	

Back Finish Cancel

9. Click the **Finish** button to end the process. A message will be displayed on the screen.

**Finished**

Assessment is now saved and ready.

You can now proceed to your Inbox to start assessing or go back to DA Review.

Proceed to Inbox Proceed to DA Review

10. Select **Proceed to DA Review** to proceed with the review, otherwise select **Proceed to Inbox** to lead you back to the **Competency Assessment** screen.

## Completing a Competency Assessment

To assess the learner's competency,

1. go to **Workspace > Competency Assessments**.
2. The **Competency Assessments** screen appears. Click the **Tool** icon and then select **Assess** button.

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**Competency Assessments**

Participant Status  
All

	Assessment/Review Of	Assessment Name	Due Date	Participant Status	Percentage Complete
	Vina Santos	Assessment Template 1	Feb 28, 2013	Not Started	<div><div></div>0%</div>

Assess

3. This leads you to **CompetencyAssessment** page. This displays the details about the reviewee, description about the assessment template, and instruction (if specified) on how to execute the

assessment template. To assess one competency, the reviewer can select the proficiency level and state the evidence.

### Competency Assessment

Employee Details

Name: SANTOS Vina

Job Title:

Join Date: Unknown

Assigned Job Profiles:

Direct Appraiser: MOLINA Alon

Description

Assessment Template 1

Instructions

Assessment Template 1

Competencies

▼ Stand-alone Competencies

Competency	VinaEmployee's Level	Evidence
Java	<div>Select Level ▼</div>	

Overall Comments

Save

Finish

Close

- By clicking the proficiency level drop down button, you can get the level selection dialog box

**Select a level** ✕

### A3 Develop your personal networks

**Descriptions**  
 This unit is about developing your personal networks to support both your current and future work. Your personal networks may include people in your own organisation, people you meet from other organisations and people you are in contact with over the phone or the Internet. Developing personal networks is based on the principles of reciprocity (exchanging things with others for mutual benefit) and confidentiality. People only want to network if there are mutual benefits from exchanging information and other resources. There must also be clearly agreed boundaries of confidentiality – certain information and resources may not be exchanged because they are confidential.

**Behavior**

1. You acknowledge when your own interests are in conflict with common goals.
2. You state your own position and views clearly and confidently in conflict situations.
3. You encourage others to share information and knowledge within the constraints of confidentiality.
4. You identify and work with people and organisations that can provide support for your work.
5. You work to develop an atmosphere of professionalism and mutual support.
6. You clarify your own and other's expectations of relationships.
7. You model behaviour that shows respect, helpfulness and co-operation.
8. You keep promises and honour commitments.
9. You consider the impact of your own actions on others.
10. You reflect regularly on your own experiences and use these to inform future actions.

**Outcomes**

1. Develop and maintain personal networks of contacts, which are appropriate to meet your current and future needs for information and resources.
2. Ensure that key members of your personal networks have an accurate idea of your knowledge, understanding, skills, abilities and experience and are aware of the benefits of networking with you.
3. Establish boundaries of confidentiality between yourself and members of your personal networks and, where appropriate, develop guidelines for exchanging information and resources.
4. Develop your personal networks to reflect your changing interests and needs.
5. Make active use of the information and resources gained through your personal networks.
6. Introduce people and organisations with common interests to each other.

Level	Description
	Does not meet any criteria
1	No knowledge or experience
2	awareness (needs direction)
3	understanding (application but needs some support)
4	Good (confident)
5	Competent (expert - no guidance)

You can also provide an overall comment on the space provided.

If you are not yet finish with the assessment you can click the **Save** button to keep the information you have provided.

Incomplete assessment will show the percentage completed when view on the *Competency Assessment* screen. The calculation of the percentage is (number of assessed competencies) / (total number of competencies + 1), +1 = Click the Finish button For example, an assessment has 3 competencies.

- If the reviewer has assessed 1 competency, the percentage of the assessment will be 25%.
- If the reviewer has assessed all 3 competencies, the percentage of the assessment will be 75%.
- If the reviewer has assessed all 3 competencies and clicked the Finish button, the percentage of the assessment will be 100%.

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### Competency Assessments

Participant Status  
All

	Assessment/Review Of	Assessment Name	Due Date	Participant Status	Percentage Complete
⚙	Vina Santos	Assessment Template 1	Feb 28, 2013	Finished	100%

To resume on the assessment, click the **Assess** button under the **Tools** icon from the *Competency Assessment* screen.

Once the reviewer completes the assessment, click the **Finish** button. This returns to Competency Assessment screen with the updated percentage completion.

**Note:** If a second reviewer and self-assessment is specified, the second reviewer and the reviewee needs to login to the application and perform the assessment the way the primary reviewer completed it.

## Secondary Reviewers Selection by Employees

If the assessment template is set to **Allow Reviewee to select secondary reviewers**, the reviewees are allowed to select their own set of secondary reviewers. When a competency assessment is deployed with this setting, the following process applies:

The Primary Reviewer is no longer required to select the secondary reviewers during assessment deployment. Notice that the **Add Reviewers** link under the **Secondary Reviewers** section is not available.

### Competency Assessment Wizard

Assessment Template Reviewers Competencies

**Primary Reviewer**  
MOLINA Alon (NETDALON) [Change](#)

Due:  
☒ 30 Days from Assignment  
☐ Date: (not specified)

Weight ratio: 1.0

**Self Review**  
☒ Allow Self Review

Due:  
☒ 30 Days from Assignment  
☐ Date: (not specified)

Weight ratio: 1.0

**Reviewee**  
STUDENT New (EMPNO003)

**Secondary Reviewers**  
 Peers Subordinates  
 Number of Reviewers: 3  
 Due:  
☒ 30 Days from Assignment  
☐ Date: (not specified)  
 Weight ratio: 1.0

Back Next Cancel



This is because the Reviewee is allowed to select the Secondary Reviewers by clicking **"Select Reviewers"** button from **Review > Competency Assessments** screen.

#### Competency Assessments

Participant Status  
All

Assessment/Review Of	Assessment Name	Due Date	Participant Status	Percentage Complete
Vina Santos	Assessment Template 1	Feb 28, 2013	Waiting For Selection	0%

Select Reviewers

The selection process is very similar to the deployment screen where the Reviewee is required to select the required number of Secondary Reviewers from a list.

#### Select Secondary Reviewers

Reviewers

Employee  
SANTOS Vina (EMPNO005)

Secondary Reviewers  
Peer  
Number of Reviewers: 1  
0 selected  
Search for a user

Once the Secondary Reviewers have been chosen, the Primary Reviewer will see an **"Approve"** button from the **Review > Competency Assessments** screen.

#### Competency Assessments

Participant Status  
All

Assessment/Review Of	Assessment Name	Due Date	Participant Status	Percentage Complete
Vina Santos	Assessment Template 1	Feb 28, 2013	Waiting For Rating Control	0%

Approve

Primary Reviewer has an option to approve the selected reviewers or edit the reviewers as required.

#### Approve Secondary Reviewers

Reviewers

Employee  
SANTOS Vina (EMPNO005)

Secondary Reviewers  
Peer  
Number of Reviewers: 1  
1 selected  
STUDENT New (EMPNO003)  
STUDENT New (EMPNO003)

Approve Cancel

Once the Primary Reviewer approves the selection, those selected Secondary Reviewers will be able to

o start the Competency Assessment.

**Note:**

- Reviewee will not be able to start assessment until all the Secondary Reviewers have been selected.
- Primary Reviewer will not be able to sign off the assessment until all Secondary Reviewers have completed the Competency Assessment.

### **Controlling Final Rating (by Primary Reviewer)**

The user rating for a competency is calculated using the average of all ratings assessed by the reviewers. Talent Suite provides a way for the Primary Reviewer to control the final rating given to the user. With this setting set in the assessment template, the Primary Reviewer will not be able to start his/her assessment until all other reviewers have completed their assessments.

The final rating control is done when signing off the assessment.

To configure the Primary Reviewer as the final rating controller, see section *Creating New Assessment Template*.

## Competency Assessment

**Reviewee Details**  
 Name: STUDENT 4 New4  
 Assigned Job Profiles:

Job Title:  
 Join Date: Unknown  
 Direct Appraiser: MOLINA Alon

**Reviewer Details**  
 Primary: MOLINA Alon  
 Peers: Anonymous User(s)  
 Subordinates: Anonymous User(s)

**Description**

**Ad hoc Competencies**

**10. IT Operations**  
 Rated Average: 1.7

Reviewer	Reviewer Type	Rating	Evidence
Anonymous User	Peers	Hidden	Hidden by assessment setting
Anonymous User	Subordinates	Hidden	Hidden by assessment setting
STUDENT 4 New4	Reviewee	2.0	sample
MOLINA Alon	Primary	Select Level	

**18. Customer Focus**  
 Rated Average: 1.0

Reviewer	Reviewer Type	Rating	Evidence
Anonymous User	Peers	Hidden	Hidden by assessment setting
Anonymous User	Subordinates	Hidden	Hidden by assessment setting
STUDENT 4 New4	Reviewee	1.0	sample
MOLINA Alon	Primary	Select Level	

**Overall Comments**

Reviewer	Comment
MOLINA Alon	
Anonymous User	Hidden by assessment setting
Anonymous User	Hidden by assessment setting
STUDENT 4 New4	sample

**Training Plan**  

Auto Suggest Training Plan
 Add Extra Learning Modules

Course Name	Course ID	Addressed Competency	Priority	Complete By
There are no items to display.				

Sign Off
 Save & Quit
 Cancel

**Note:** The sign off page shows the following information

- The required rating, average rating, and whether the user has met the requirement are displayed graphically.
- Details of each reviewer such as name, reviewer type, rating, and evidence are optionally included (configurable in the template).

## Allowing Secondary Reviewers to Finish Partial Assessments

On the access control setting of the competency assessment template, it allows the secondary reviewers to finish partial assessment. This means that secondary reviewers will have the ability to bypass the assessment of certain competencies as they wish. The secondary reviewers will be able to select "Not Applicable" when selecting the level during an assessment. See section *Creating a New Assessment Template* to show the configuration setting under the access control section that allows the secondary reviewer to complete partial assessments.

## Sign-off the Competency Assessment

Once all the reviewers have finished the Competency Assessment, the Direct Appraiser can sign off the assessment to finalize it. The Sign Off page would display the following information:

- Reviewee Details such as Name, Job Title, Join Date, Assigned Job Profiles, and Direct Appraiser
- All the reviewee's job profiles & competencies categorized into strengths and weaknesses
- Each competency would have its required level, reviewee's average level, and the computed gap
- Evidence and overall comments from each reviewer

On the *Competency Assessment* screen, click the **Tool** icon and then choose the **Sign Off** button.

### Competency Assessments

Participant Status  
All

Assessment/Review Of	Assessment Name	Due Date	Participant Status	Percentage Complete
Vina Santos	Assessment Template 1	Feb 28, 2013	Waiting For Rating Control	0%

Sign Off

The summary of the appraisee's assessment appears. The final reviewer needs to assess the appraisee by providing the strengths and weaknesses ratings for each competency. The reviewer can also provide evidences on the space provided.

Strengths

**A1 - Manage your own resources** Rated Average: 2.5

Reviewer	Reviewer Type	Rating	Evidence
Anonymous User	Peer	Hidden	Hidden by assessment setting
STUDENT3 New3	Reviewee	2.0	Sample
MOLINA Alon	Primary	Level 3	

Weaknesses

**A2 Manage your own resources and professional development** Rated Average: 3.0

Reviewer	Reviewer Type	Rating	Evidence
Anonymous User	Peer	Hidden	Hidden by assessment setting
STUDENT3 New3	Reviewee	3.0	Sample
MOLINA Alon	Primary	Select Level	

Apart from the comments/evidences for each competency, the final reviewer can also provide his/her overall comments about the appraisee.

Overall Comments

Reviewer	Comment
MOLINA Alon	
Anonymous User	Hidden by assessment setting
STUDENT3 New3	Sample

Before completing the sign off, the final reviewer can also able to suggest a training plan to the reviewee based on his/her weaknesses using the **"Auto Suggest Training Plan"** or manually searching for Courses.

Auto Suggest Training Plan function allows the system to automatically determine courses for competencies in which the reviewee has a negative gap to improve his/her weaknesses. The system will also take into consideration the reviewee's training records and suggest only courses that are not already completed:

Course Name	Course ID	Addressed Competency	Priority	Complete By
Maritime Navigation	SingleCourseManifest	A2 Manage your own resources and professional development	Medium	(not specified)
Human Computer Interface Guidelines	MOD-0000	+ Please click here to select competencies	Medium	(not specified)

In addition to Auto Suggest Training Plan, the reviewer can also manually add learning modules in case the training is not provided on the Auto Suggest Training Plan. The search bar allows the final reviewer to select the courses:

Course Name	Course ID	Addressed Competency	Priority	Complete By
Maritime Navigation	SingleCourseManifest	A2 Manage your own resources and professional development	Medium	(not specified)
Human Computer Interface Guidelines	MOD-0000	+ Please click here to select competencies	Medium	(not specified)

Click the **Sign Off** button once the competency assessment is completed. The reviewer has the option to save and quit the competency assessment screen.

## Task Approval

To approve or mark a Task as complete for a learner:

1. Go to **Workspace > Task Approval**. Use search criteria if necessary and then click **Filter**

### Task Approval

Task Status: Pending Sign Off  Appraiser's Role: All  First Name:  Last Name:

Task Title:  ☐ Tasks with Reminder

Task Title	Employee	Enrolled on	Approver's Role	Marked as Completed on
TASK-002	BROWN Joseph (LEARNER02)	08-May-2013 11:33	Direct Appraiser	
TASK-004	BROWN Joseph (LEARNER02)	08-May-2013 11:33	Selected User	

Showing: 1 - 2 of 2

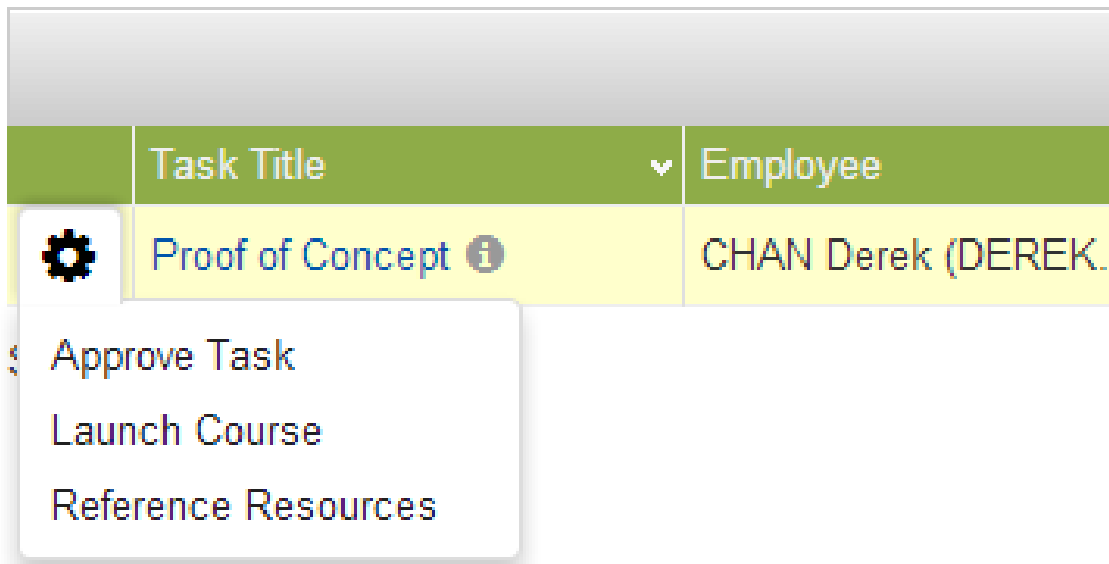
2. Mouse over the info icon next to task title, and the task description is displayed.

Task Title	Employee	Enrolled on	Approver's Role	Marked as Completed on
TASK-002	BROWN Joseph (LEARNER02)	08-May-2013 11:33	Direct Appraiser	
TASK-004	BROWN Joseph (LEARNER02)	08-May-2013 11:33	Selected User	

Showing: 1 - 2 of 2

3. You can see more detailed information about the task before approving it by launching it or examining reference resources via the **Tool** icon

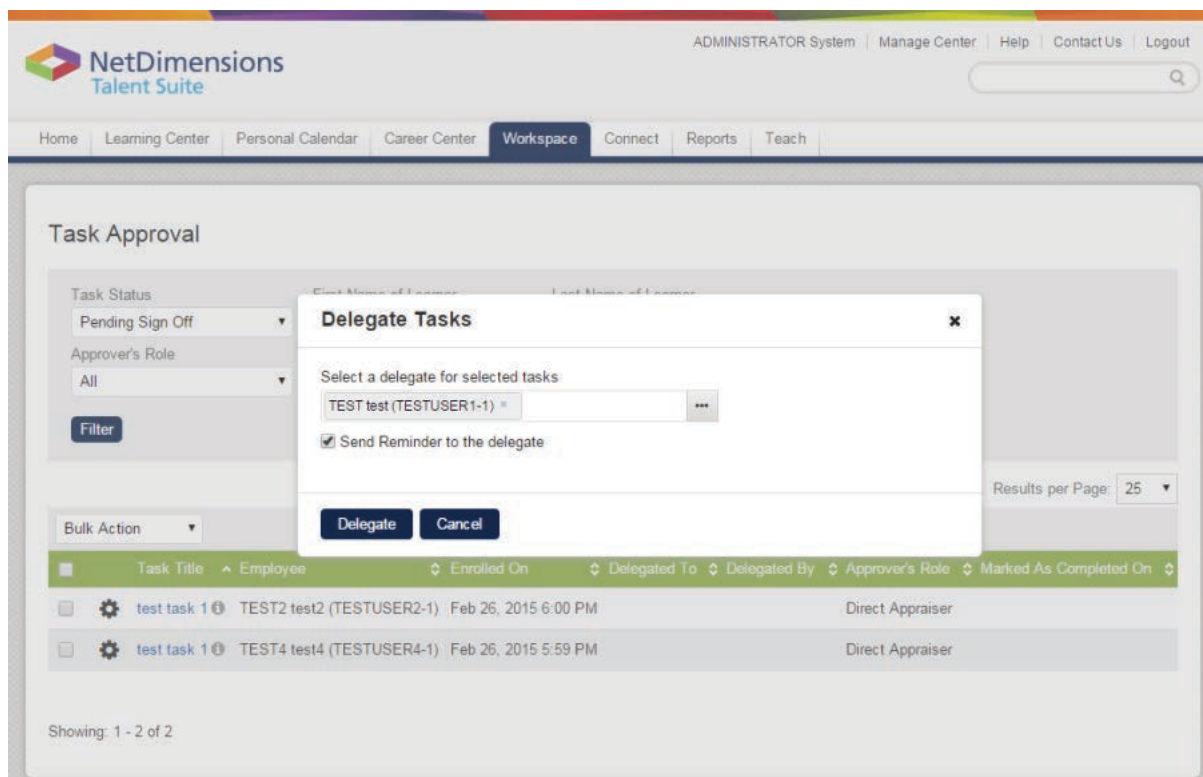




4. **Approve a Task** to approve the task.

### Delegating Task Approval

If you qualify as an approver for a task because you are the user's direct appraiser, you can delegate the approval of the task to someone else. You can delegate task approval to another user in bulk or individually under the gear icon.



A reminder can be sent to the new delegate with the checkbox option in the setup, or from the tool icon of the delegated task approval record.

- The new delegate cannot further delegate it to another party.
- When a task approval is delegated, the record still appears on the original approver's list as well as on the new delegate's list.
- Task approval delegation can be cancelled by the original approver, which will result in the original approver being responsible again to approve the task
- If the delegated approver is subsequently removed from the system, all approvals that have been delegated to him/her will return to the original approver's queue

## Enrollment Approval

---


(Available for Performance and Learning only)

Enrollment Policies can be created in Talent Suite to control how the enrollment processing for courses works. Policies may allow users to directly enroll in courses or enforce that some type of approval is first granted before users are enrolled. The Enrollment Approval function allows you to approve or deny an enrollment that uses an approval policy. To approve or deny an enrollment go to **Workspace > Enrollment Approval**.

From here you can do the following:

- Filter the list of approvals
- Approve the enrollment by clicking **Pay by Tokens** or deny the enrollment by clicking the **Deny** button.
- View the career development center of an individual by clicking the name of the user you want to view.
- Buy tokens by click the **Buy Tokens** button
- Delegate approval authority to other users.

**Note:** Click on the item name to access its details. Filter text may be entered to match user or course text.


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### Enrollment Approval

Click on Approve or Reject to approve or deny the enrollment. Click on the item name to access its details. Filter text may be entered to match user or course text.  
Click [here](#) to delegate approval authority to other users.

Hide filters

Owner & status  
Show all pending approvals

Period  
All

Keywords

Organization  
Click to select

Filter

Results per Page: 10

Showing: 1 - 10 of 45

Print

Participant	Learning Program / Module	Session	Reason for Taking This	Request Date	Step Status	Exam	Approve	Reject
ACCOUNT Test (MARCUS.BELBY)	Literature and Language Arts	Jan 14, 2013		Jan 14, 2013	Approval Step 2 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>
ACCOUNT Test (MARCUS.BELBY)	no title	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>
ACCOUNT Test (MARCUS.BELBY)	Pay by Approver (SH)	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#">Add to cart</a> Payment Method: Online Payment Currency: (CAD) List Price: USD100.00 Price Info: HKD Token List Price: 100.00 Tokens/Credits	<a href="#">Deny</a>
ADAMS Cat (ING_CAT)	no title	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>
ADAMS Cat (ING_CAT)	Pay by Approver (SH)	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#">Add to cart</a> Payment Method: Online Payment Currency: (CAD) List Price: USD100.00 Price Info: HKD Token List Price: 100.00 Tokens/Credits	<a href="#">Deny</a>
ADAMS Cat (ZCORP_CAT)	no title	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>
ADAMS Cat (ZCORP_CAT)	Pay by Approver (SH)	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#">Add to cart</a> Payment Method: Online Payment Currency: (CAD) List Price: USD100.00 Price Info: HKD Token List Price: 100.00 Tokens/Credits	<a href="#">Deny</a>
ADAMS Cat (ING_CAT)	Literature and Language Arts	Sep 4, 2012		Sep 4, 2012	Approval Step 2 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>
ADAMS Cat (ZCORP_CAT)	Literature and Language Arts	Sep 4, 2012		Sep 4, 2012	Approval Step 2 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>
ADAMS Jane (NETD_AIKA)	Literature and Language Arts	Jan 14, 2013		Jan 14, 2013	Approval Step 2 (Awaiting Response)		<a href="#">Approve</a>	<a href="#">Deny</a>

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NetDimensions

## Combine Enroll and Single Step Approval

When a course approver is enrolling a learner on a course with no payment required with only 1-step approval defined in the policy, the enrollment and approval actions are combined into a single step.

On the enrollment page, after the approver clicks "Enroll users" button, the approver can enter justification and configure any additional enrollment information, then press the "Approve and Enroll" button to perform the combined enrollment and approval action.

### Enrollment Approval

#### For Test classroom

ENROLLMENT APPROVAL REQUEST



Initial Enrollment Approval by APPRAISER One (DA1-1) is required before this request can proceed.

Reason for Enrollment\*

Enter justification here.

ADDITIONAL INFORMATION

Preferred Date

(not specified)  

Comments\*

Required

Approve and Enroll

Cancel

If the approval involves payment (or the learner is enrolling by him/herself), the button label will become "Submit Enrollment Request" and the payment, approval and enrollment steps will be performed separately.

## Approval Delegation

(Available for Performance and Learning only)

Managers and administrators may now delegate approval authority to other users for a specified period of time. This works for internal and external approvals. At **Workspace > Enrollment Approval**:

1. Click the **Click here to delegate approval authority to other users**
2. Click the Add New Entry

## Delegation

This is a list of users to whom you have granted approval authority for the specified period. This authority applies to all requests assigned directly to you.

No delegates have been specified.

[Add New Entry](#)

5. On this page, you are required to enter the following parameter:

- Select the user whom you want to delegate the approval by clicking the **Select** button.
- The cover period where the delegated user is allowed to approve.

## Delegation

This is a list of users to whom you have granted approval authority for the specified period. This authority applies to all requests assigned directly to you.

<b>Delegate Name:</b>	<input type="text"/>	<a href="#">Select</a>
<b>Start Date:</b>	<input type="text" value="(not specified)"/>	 
<b>End Date:</b>	<input type="text" value="(not specified)"/>	 
<div><a href="#">Save</a> <a href="#">Cancel</a></div>		

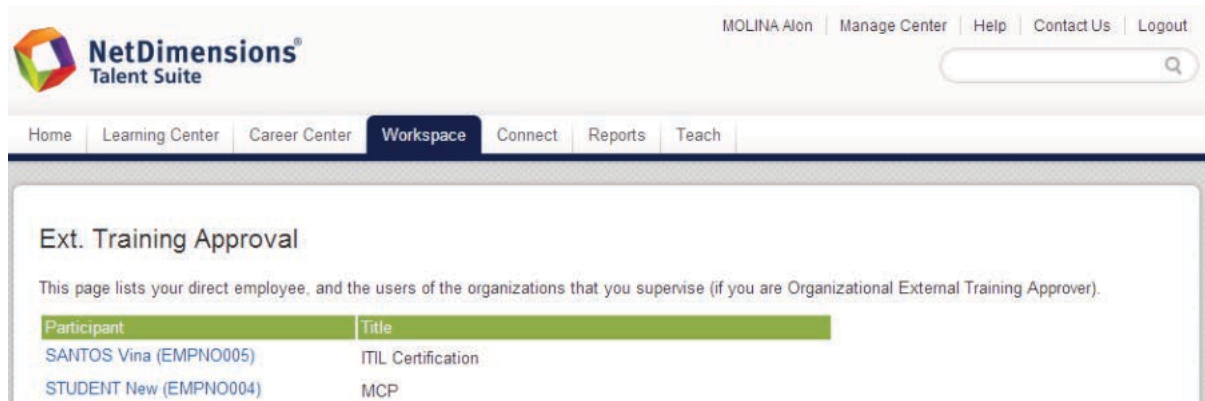
Click the **Save** button.



## External Training Approval






(Available for Performance, Learning, and e-Learning only)

External training relates to courses that users have taken outside of the LMS. Where approval is required, go to Workspace > External Training Approval:



Opening the External Training Record will allow you to set the status to "approved":

This form may be used to record training history earned outside of this system.

Title*:	<input type="text" value="MCP"/>		
Course Type:	<input type="text" value="Classroom"/>		
Subject:	<input type="text" value="Unassigned"/>		
Start Date*:	<input type="text" value="Jan 1, 2013"/>	 	
End Date*:	<input type="text" value="Jan 11, 2013"/>	 	<input type="button" value="Autofill"/>
Venue:	<input type="text" value="Manila"/>		
Language:	<input type="text" value="English"/>		
Duration(Training hours):	<input type="text" value="40.0"/>	<input type="text" value="hour(s)"/>	
Course Cost:	<input type="text" value="1200.0"/>		
	<input type="text" value="United States of America, Dollars"/>		
Grade:	<input type="text" value="80"/>		
Score:	<input type="text" value="80"/>		
Vendor Information:	<input type="text"/>		
Comments:	<input type="text"/>		
Attachment:	<input type="button" value="Choose File"/> No file chosen		
Status*:	<input type="text" value="Pending Approval"/> 		

(\* Mandatory fields)

To allow a role to see external training approval requests, the "Is Organizational External Training Approver" Role Access Control must be set to "Yes".

# Appraisal Review

(Available for Performance only)

Appraisals are accessed via Workspace > Appraisal Review:

The Appraisal Review screen allows you to do the following:

- Search appraisals
- View appraisals
- View and Print the Performance Review Summary of the appraisee
- Perform appraisals
- Clone an appraisal
- Modify appraisal settings
- Print an appraisal

## Changing the Appraisal Review Settings

To modify the settings of an appraisal, on the **Appraisal Review** screen, click the **Tools** menu of the participant and then select **Change Setting**:

# Enrollment Wizard

(available for Performance and Learning only)

The Enrollment Wizard allows you to enroll or make transcript changes for multiple students for multiple modules. You can access the Enrollment Wizard under the Workspace menu:

**Enrollment Wizard**

The enrollment wizard allows you to select a participant (or a group of participants) for direct execution of an enrollment action. The enrollment action will apply to the selected module (or group of modules) at the session level. Note, however, that some enrollment actions may require additional inputs. These additional input fields will automatically be displayed with respect to the enrollment action selected.

**Settings**

Action: Enroll

Module(s): + -

Participant(s): + -

**Additional Settings**

**For Enroll**

☐ Suppress automatic e-mails

☒ Ignore Schedule Conflict

Charged Cost Center:

Module Deadline:

Restricted Start Date:

**History**

Action	Date	Users	Download log	Download failed entries
There are no items to display.				

**Enroll**

## Execution Parameters

You must specify the following before executing the action:

1. Action (Change Enrollment Status or Enroll)
2. Modules
3. Participants

For Enroll Action, you can also specify additional options:

- Suppress automatic e-mails
- Ignore Schedule Conflict
- Charged Cost Center
- Module Deadline

The Module Deadline in the Enrollment Wizard overrides any settings in the Catalog Editor, including for those module due dates that have already expired, will be expired, or have no due date. If a due

date hasn't been selected in the Enrollment Wizard, there will be no change to the due date setting.

When the action 'Change Enrollment Status' is selected, additional options become available. You can choose a Change Enrollment Procedure out of 'Change Overall Status' and 'Extend Module Deadline'.

For Change Enrollment Status - Change Overall Status action, you have the following options:

- Suppress automatic e-mails
- Target Status
  - If 'Withdrawn' is selected, you can opt to remove withdrawn transcripts by checking the "Do not keep withdrawal records" checkbox

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### Enrollment Wizard

The enrollment wizard allows you to select a participant (or a group of participants) for direct execution of an enrollment action. The enrollment action will apply to the selected module (or group of modules) at the session level. Note, however, that some enrollment actions may require additional inputs. These additional input fields will automatically be displayed with respect to the enrollment action selected.

**Settings**

Action  
Change Enrollment Status ▼

Module(s) + -

Participant(s) + -

**Additional Settings**

**For Change Enrollment Status**

Change enrollment procedure  
Change overall status ▼

☐ Suppress automatic e-mails

Target Status  
- Select a target status - ▼

**History**

Action	Date	Users	Download log	Download failed entries
There are no items to display.				

Change Enrollment Status

If an enrollment is currently in a status for which the target status specified is not valid, the update operation will fail. The details/reasons of the enrollment operations/failures can be found in the logs.

```

2013/May/09 11:53:04 Changing overall status for user [danny] on learning object [M1], session ID [EKP000000003] to "Completed"
2013/May/09 11:53:04 Transcript status for user [danny] on learning object [M1], session ID [EKP000000003]: Not Started
2013/May/09 11:53:04 Status change for user [danny] on learning object [M1], session ID [EKP000000003] from "Not Started" to "Completed": Successful
2013/May/09 11:53:04 Changing overall status for user [mary] on learning object [M1], session ID [EKP000000003] to "Completed"
2013/May/09 11:53:04 Status change from "Withdrawn" to "Completed" is not allowed.
2013/May/09 11:53:04 Changing overall status for user [joe] on learning object [M1], session ID [EKP000000003] to "Completed"
2013/May/09 11:53:04 Status change from "Completed" to "Completed" is not allowed.
2013/May/09 11:53:04

2013/May/09 11:53:04 Summary Report
2013/May/09 11:53:04 Number of sessions SUCCESSFULLY processed: 1
2013/May/09 11:53:04 Number of sessions processed that FAILED: 2
2013/May/09 11:53:04 Total number of sessions processed: 3

```

With 'Extend Module Deadline', you can enter the number of days to extend the transcript completion deadline by.

Setting -- Change Enrollment Status

Change Enrollment Procedure: Extend Module Deadline

No. of Days Extension:

Action	Date	Users	Download log	Download Failed Entries
No record(s) found				

## Summary Report

Once the action has been executed, a summary report will provide number of records processed information:

PeopleFluent

HO Sara | Manage Center | Help | Contact Us | Logout

Home | Learning Center | Personal Calendar | Career Center | Workspace | Connects | Reports | Teach

Below is a summarized report of the number of modules per user processed by the enrollment wizard for the "Enroll" action.

**Summary Report**


Number of records SUCCESSFULLY processed:	2
Number of records which FAILED:	0

[Back to Enrollment Wizard](#)

## History

A history of all Enrollment Wizard executions will be displayed on the landing page. From here you can access the log file and CSV Error Report for the respective run.



HO Sara | [Manage Center](#) | [Help](#) | [Contact Us](#) | [Logout](#)

Home | [Learning Center](#) | [Personal Calendar](#) | [Career Center](#) | [Workspace](#) | [Connects](#) | [Reports](#) | [Teach](#)

## Enrollment Wizard ?

The enrollment wizard allows you to select a participant (or a group of participants) for direct execution of an enrollment action. The enrollment action will apply to the selected module (or group of modules) at the session level. Note, however, that some enrollment actions may require additional inputs. These additional input fields will automatically be displayed with respect to the enrollment action selected.

Settings

Action

- Select an action -

Module(s)

Participant(s)

History

Action	Date	Users	Download log	Download failed entries	
Enroll	June 25, 2019 3:20:43 AM CDT	HO Sara (SARA)	<a href="#">Log File</a>	<a href="#">CSV Error Report</a>	<a href="#">Delete</a>

NetDimensions

## Compliance Analytics

(Available for Performance and Learning only)

Compliance Analytics performs a real-time analysis of training records to identify the degree (expressed in %) to which departments, groups, and individuals have completed one or more specified courses.

When scanning records, courses with an overall status of **COMPLETED**, **FINISHED USING**, and **PASS ED** are interpreted as "completed" for statistical purposes.

In calculating the compliance % results for groups, each individual is interpreted as either conforming or nonconforming in calculating the overall result for the group. For example:

User A in Department X has completed 10 of 10 courses.

User B in the same department has completed 2 of 10.

The Compliance % figure for Department X is 50% (1 of 2 compliant), while the Training Progress % figure is 60% (12/20 courses completed).

Note:

- In selecting filtering criteria, note that by default, closed user accounts (e.g., users who have left the organization) are not included in the analysis. If you do want these accounts included, uncheck the filtering option.
- If you do not want to have the statistics applied to all members of the selected org or group, you can further limit the analysis to those who have had the required training assigned only (i.e., Exclude self-enrollment records).
- Likewise, you may exclude users who have no such training in their record at all (self-enrollment or assigned) by checking the filter "Exclude users with no assignments".

This drill down analysis does NOT require that all users be assigned all courses to correctly calculate the completion percentage. For example, a user who has completed one course of five required courses, but has not yet been enrolled in the other four courses, would show a 20% completion percentage.

To access Compliance Analytics, go to **Manage Center > TALENT > COMPLIANCE ANALYTICS > Compliance Analysis**.

### Step 1: Participant Selection

On the occasions that users may wish to put individual user assignments together into an analysis, instead of choosing any grouping, the **"No Grouping"** option is fit for purpose.

**STEP 1: TARGET PARTICIPANTS**

Select the participants to be included in the analysis.

Participants grouped by  
No Grouping

Users 12 selected

2 User (U2-1) ✕	1 User (U1-1) ✕
8 User (U8-1) ✕	7 User (U7-1) ✕
4 User (U4-1) ✕	3 User (U3-1) ✕
6 User (U6-1) ✕	5 User (U5-1) ✕
A User (U10-1) ✕	B User (U11-1) ✕
C User (U12-1) ✕	D User (U13-1) ✕

Search for a user

## Step 2: Module Selection

**STEP 2: TARGET LEARNING**

Select the learning to be targeted in the analysis.

Analysis Type  
Program Sessions ▼

Target Program Sessions + -

- Programming Language (p1), Session1 (Session1)
- Software Engineering (p2), Session1 (Session1)

There are three Analysis Types available:

1. Modules - considers transcripts for the selected target learning only and does not drill down into program components
2. Program Sessions - considers transcripts for modules in the selected target program session
3. Program Progress - for each selected target program session, the analysis identifies an appropriate enrollment for the learner and produces results against transcripts within the identified enrollment's transcript hierarchy

To illustrate the difference between the above analysis types, consider the scenario:

1. A Program P1 with a single session that contains a Module O1
2. A learner completes O1 as a standalone module
3. Subsequently, the learner enrolls on P1 and fails the component O1

The learner's records would look similar to:

Transcript ID	Module ID	Status
T1	O1	Completed
T2	P1	In Process
T3	O1	Failed

Using default settings, the Compliance Analysis for the learner against the program session would yield the following results:

Type	Compliance Status	Considered Transcripts
Modules	Not Compliant	T2
Program Sessions	Compliant	T1
Program Progress	Not Compliant	T2, T3

## Step 3: Transcript Selection

- **Include self-enrolled Target Learning transcripts:**
- **If a participant has multiple enrollments for a given course, match compliance criteria against > Any of the participant's transcripts:** When this is checked, only the learning that is compliant will be taken when a learner completed the same module multiple times.

**STEP 3: TARGET TRANSCRIPTS**

The system will retrieve all the transcripts for all the participants identified in Step 1 for all the target learning specified in Step 2. You can further limit which transcripts are included using the available options in Step 3.

☐ Include self-enrolled Target Learning transcripts

If a participant has multiple enrollments for a given course, match compliance criteria against

- ☒ Any of the participant's transcripts  
☐ The participant's latest transcript ?

**Step 4: Compliance Check**

The following setting defines a transcript as compliant if it is on effective revision and either completed or on-target.

Under **Compliance Definition**, "*On Target*" means any enrolled learning not yet passing the deadline, if any. When "**Learning that is Completed or On Target as of**" is selected, you can additionally specify a future "*as of*" date. This can be useful in proactively identifying those participants who will lose their "On Target" status if they do not complete some learning by the specified date.

Under **Each Participant is required to comply with**:

- **Learning in Enrolled Target Program Sessions** (only when **Analysis Type: Program Sessions / Program Progress** in Step 2 is selected): When this is checked, even if a sub-module transcript is completed, it will not be counted if the learners have not yet enrolled into the program session selected in Step 2. Any learners without any transcript getting counted will be displayed as "N/A" in the analysis results.
- **Enrolled Target Learning** (only when **Analysis Type: Modules** in Step 2 is selected)
- **Target Program Sessions with Auto-Enroll Criteria that apply**: When this option is chosen, only those participants who are the auto-enroll targets of the selected program session will be put into the compliance check. The leftover participants will be reported as "N/A" in the analysis results.

For models that use the "Deactivated" transcript status to identify enrollments that are no longer required due to a change in job situations, these transcripts can be ignored by using the **Disregard Deactivated Target Modules / Program Sessions** checkbox. When this is checked, the target modules / program sessions would be counted as "N/A" (i.e. neither compliant nor non-compliant) if the learners' overall status for them is "Deactivated".

**STEP 4: CRITERIA FOR COMPLIANCE**

Once a set of candidate transcripts have been identified from Step 3, the system will attempt to find transcripts that fulfil compliance criteria. You can customize the criteria for compliance in Step 4.

Compliance Definition

☒ Learning completed between

e.g Dec 7, 2017 

And

Dec 7, 2017 

☐ Learning that is Complete or On Target ? as of

Dec 7, 2017 

Revision

- ☒ Any  
☐ Effective

Each Participant is required to comply with

- ☒ All Target Learning  
☐ Learning in Enrolled Target Program Sessions ?  
☐ Target Program Sessions with Auto-Enroll Criteria that apply  
☐ Disregard Deactivated Target Modules / Program Sessions

## Step 5: Final Filtering

All participants and their compliance status are included in the output by default. However, depending on your needs, you may want to filter out those that are or are not compliant so that you can view the necessary records only - you can do so using the Compliance Focus setting. Users with no enrollment are those reported as N/A in the analysis results. You may use the checkbox in Step 5 to decide whether these users should be included in the results.

**STEP 5: RESULTS FILTERING**

After compliance per participant has been calculated in Step 4, the system can further filter the results so that you can focus on the necessary information only.

Compliance Focus

☒ All Participants  
☐ Compliant Participants Only  
☐ Non-compliant Participants Only

☒ Include users with no enrollments on any target learning

## Step 6: Starting Analysis

Below shows the paginated analysis results, sorted in descending order of training progress %:

**67%**

OVERALL COMPLIANCE

4/6 of participants compliant, 6 participants N/A

**87%**

OVERALL TRAINING PROGRESS

13/15 of all mandatory training compliant

Results per Page: 10

Showing: 1 - 10 of 12

Participant Name	Modules	Last Updated On	Training Progress	Training Progress %	Compliance Status
1 User (U1-1)	• Programming Language (p1) • Software Engineering (p2)	Sep 14, 2015 3:00 PM WST	Mandatory 3/3 Optional 0/1	100% (3/3 mandatory)	✓ Compliant
5 User (U5-1)	• Programming Language (p1)	Sep 14, 2015 3:04 PM WST	Mandatory 1/1 Optional 1/1	100% (1/1 mandatory)	✓ Compliant
7 User (U7-1)	• Software Engineering (p2)	Sep 14, 2015 3:04 PM WST	Mandatory 2/2	100% (2/2 mandatory)	✓ Compliant
8 User (U8-1)	• Programming Language (p1) • Software Engineering (p2)	Sep 14, 2015 3:07 PM WST	Mandatory 3/3 Optional 1/1	100% (3/3 mandatory)	✓ Compliant
6 User (U6-1)	• Programming Language (p1) • Software Engineering (p2)	Sep 12, 2015 2:51 PM WST	Mandatory 2/3 Optional 1/1	67% (2/3 mandatory)	✗ Not Compliant
4 User (U4-1)	• Programming Language (p1) • Software Engineering (p2)	Sep 14, 2015 3:04 PM WST	Mandatory 2/3 Optional 1/1	67% (2/3 mandatory)	✗ Not Compliant
2 User (U2-1)	N/A	-	N/A	N/A	N/A
3 User (U3-1)	N/A	-	N/A	N/A	N/A
A User (U10-1)	N/A	-	N/A	N/A	N/A
B User (U11-1)	N/A	-	N/A	N/A	N/A

Showing: 1 - 10 of 12

- Analysis results with pagination and the Compliance Focus being "Compliant Participants Only" is shown below:

100%

OVERALL COMPLIANCE

4/4 of participants compliant

100%

OVERALL TRAINING PROGRESS

9/9 of all mandatory training compliant

Results per Page: 25

Showing: 1 - 4 of 4

Bulk Action

Participant Name	Modules	Last Updated On	Training Progress	Training Progress %	Compliance Status
<input type="checkbox"/> 1 User (U1-1)	<ul style="list-style-type: none"><li>Programming Language (p1)</li><li>Software Engineering (p2)</li></ul>	Sep 14, 2015 3:00 PM WST	Mandatory 3/3 Optional 0/1	<div>100% (3/3 mandatory)</div>	<input checked="" type="checkbox"/> Compliant
<input type="checkbox"/> 5 User (U5-1)	<ul style="list-style-type: none"><li>Programming Language (p1)</li></ul>	Sep 14, 2015 3:04 PM WST	Mandatory 1/1 Optional 1/1	<div>100% (1/1 mandatory)</div>	<input checked="" type="checkbox"/> Compliant
<input type="checkbox"/> 7 User (U7-1)	<ul style="list-style-type: none"><li>Software Engineering (p2)</li></ul>	Sep 14, 2015 3:04 PM WST	Mandatory 2/2	<div>100% (2/2 mandatory)</div>	<input checked="" type="checkbox"/> Compliant
<input type="checkbox"/> 8 User (U8-1)	<ul style="list-style-type: none"><li>Programming Language (p1)</li><li>Software Engineering (p2)</li></ul>	Sep 14, 2015 3:07 PM WST	Mandatory 3/3 Optional 1/1	<div>100% (3/3 mandatory)</div>	<input checked="" type="checkbox"/> Compliant

## Usability

The Compliance Analysis screen lists inputs, highlights percentages, and shows the results with pagination. The Print button will present a print preview. The Change Settings button will go backward to the input page with your last input option settings preserved. Note that if participants are grouped by organizations, you may select the results to be presented in either "Summary View" or "Flat View".

Compliance Analysis

For Program Sessions

Print

Change Settings

Selected Program Sessions:

Programming Language, Session1

Software Engineering, Session1

Include closed user accounts:

No

Include self-enrolled Target Learning transcripts:

Yes

Show Settings Details

Selected Organizations

50%

OVERALL COMPLIANCE

3/6 of participants compliant; 23 participants N/A

73%

OVERALL TRAINING PROGRESS

11/15 of all mandatory training compliant

Results per Page: 25

Showing: 1 - 2 of 2

Summary View

Reanalyze in Flat View

Organization	Total Participants	Total Training Compliant	Training Progress %	Compliance %
1 ALL/Accounting	21	0 of 0	N/A	N/A
2 ALL/Engineering	8	11 of 15	73% (11/15 mandatory)	50% (3/6 compliant; 2 N/A)

Showing: 1 - 2 of 2

Users can drill down for individual training progress for accessing programs, sub-modules and substitutes. The Progress Tracker button will direct you to the program progress tracker.



100%

OVERALL COMPLIANCE

1/1 of participants compliant

100%

OVERALL TRAINING PROGRESS

3/3 of all mandatory training compliant

1 User

ALL/Engineering

Progress Tracker

Module Title	Enrolled On	Completed On	Deadline	Last Updated On	Compliance Status
<div> <div></div> <div>Programming Language (p1)</div> </div>	Sep 14, 2015 2:56 PM WST	Sep 14, 2015 3:00 PM WST	-	-	✓ Compliant
<div> <div></div> <div>C++ (m2) Optional</div> </div>	Sep 14, 2015 2:56 PM WST	-	-	Sep 14, 2015 2:56 PM WST	N/A
<div> <div></div> <div>Java (m1) *Mandatory</div> </div>					✓ Compliant
<div> <div></div> <div>J2EE (m5)</div> </div>	Sep 14, 2015 2:59 PM WST	Sep 14, 2015 3:00 PM WST	-	Sep 14, 2015 3:00 PM WST	
<div> <div></div> <div>Completed By Substitutes</div> </div>	Sep 14, 2015 2:57 PM WST	Sep 14, 2015 3:00 PM WST	-	-	✓ Compliant
<div> <div></div> <div>Software Process (m3) *Mandatory</div> </div>	Sep 14, 2015 2:57 PM WST	Sep 14, 2015 3:00 PM WST	-	Sep 14, 2015 3:00 PM WST	✓ Compliant
<div> <div></div> <div>Software Testing (m4) *Mandatory</div> </div>	Sep 14, 2015 2:57 PM WST	Sep 14, 2015 3:00 PM WST	-	Sep 14, 2015 3:00 PM WST	✓ Compliant

Users can also export all the results shown on the current window if. Once analysis is complete, the **Export to CSV** function can be selected under the Tools drop down menu.

NetDimensions Talent Suite Manage Center System Administrator Logout

OVERVIEW LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM

### Compliance Analysis

For Modules

Selected Modules: Online1

Include closed user accounts: No

Include self-enrolled Target Learning transcripts: Yes

Change Settings Tools

Print

Export to CSV

Show Settings Details

Back to Top

0%  
OVERALL COMPLIANCE  
0/1 of participants compliant

0%  
OVERALL TRAINING PROGRESS  
0/1 of all training compliant

Results per Page: 25

Showing: 1 - 1 of 1

Bulk Action

Participant Name	Last Updated On	Training Progress %	Compliance Status
student11 test (STUDENT11-1)	-	0% (0/1)	✗ Not Compliant

Showing: 1 - 1 of 1

The exported CSV will contain the analysis settings, overall compliance, overall training progress, and the results list from the respective page:

	A	B	C	D	E	F	G
1	Selected Participants	student11 test (STUDENT11-1)					
2	Include closed user accounts	No					
3	Analysis Type	Modules					
4	Selected Modules	Online1					
5	Include self-enrolled Target Learning transcripts	Yes					
6	Include completed equivalent transcripts	Yes					
7	If a participant has multiple enrollments for a given course, match compliance criteria against	Any of the participant's transcripts					
8	Compliance Definition	Learning completed between Undefined Date and Oct 20, 2016					
9	Revision	Any					
10	Each Participant is required to comply with	All Target Learning					
11	Compliance Focus	All Participants					
12	Include users with no enrollments on any target learning	Yes					
13							
14							
15	Overall Compliance		0% 0/1 of participants compliant				
16	Overall Training Progress		0% 0/1 of all training compliant				
17							
18	Participant Name	Last Updated On	Training Progress %	Compliance Status			
19							
20	student11 test (STUDENT11-1)	-	0% (0/1)	Not Compliant			
21							
22							
23							

CAExport\_ndadmin\_1476956542681

## Review Career Development Center

(Available for Performance and Learning only)

The Career Development Center is a consolidated view for learners and managers of all compliance, certification, and training plan related information. Functions included in the Career Development Center are:

- View and Edit Employee's Profile
- View and Edit Employee's Learning Center
- View and Edit Employee's Career Center

### The Employee Profile

(Available for Performance, Learning and e-Learning only)

To view or edit the employee's profile, from the **Career Development Center** menu, click the **Employee Profile** tab.

The screenshot shows the 'Employee Information' page in the NetDimensions Talent Suite. The left sidebar contains a navigation menu with 'Employee Profile' expanded, showing 'Employee Information' (selected), 'Learning Center', and 'Career Center'. The main content area is titled 'Employee Information' and features a 'Profile Summary' section with an 'Edit' link. The summary includes a placeholder for a profile picture, the employee's name 'SANTOS Vina', and fields for 'User ID' (EMPNC005), 'Organization' (UNASSIGNED), and 'vCard' (with a 'Download' link). Below the summary are sections for 'Employment Information', 'Contact Details', 'Education' (with a '+Add Education History' link), 'Work History (Total 0 year of experience)' (with a '+Add Work History' link), and 'Other Information'. A 'Recent Activity' section on the right shows 'There is no recent activity to display.'.

The Employee's Information is divided into six categories.

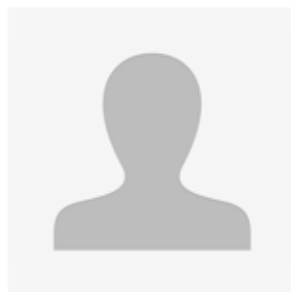
#### Profile Summary

The *Profile Summary* provides the following information such as user ID, organization, and picture of the employee. When editing the Profile summary you can do any of the following:

- download the employee's vcard
- upload employees picture, and
- configure the viewing constraints.

## Employee Information

### Profile Summary

[Upload Picture](#)**SANTOS Vina****User ID** EMPNO005**Organization** UNASSIGNED**vCard** [Download](#)**Viewing**

Public

**Constraints**☒ Allow others to see my recent course activity[Save](#)[Cancel](#)

### Employment Information

The *Employee Information* section allows you to view and edit following information:

- Employment Country
- Manager's Name
- Manager's Email
- Cost Center
- Location Code

### Employment Information

Employment Country

Philippines

Manager Name

Manager Name

Manager e-mail

Manager email

Cost Center

021

Location Code

4021

[Save](#)[Cancel](#)

### Contact Details

The *Contact Details* allows you to view and edit following information:

- Company Name
- Address 1
- Address 2
- City
- Province/State
- Postal Code
- Country
- Phone
- Telefax
- Mobile

### Contact Details

---

Company Name

Address 1

Address 2

City

Province/State

Postal Code/ZIP

Country

Unknown

▼

Phone

Telefax

Mobile

Save

Cancel

### Education

The *Education* section allows you to view, edit, and add education history records. To edit the

employee's education history:

- Click the **Tools** icon of the education you want to modify or remove.
- Click the **+Add Education History** link to add a new education history

## Education

---

**New York Univeristy, U.S** 

Sales, Marketing

Jan 1, 2012 - Present

Edit

Delete

[+Add Education History](#)

## Work History (Total 0 year of experience)

---

[+Add Work History](#)

This opens the menu for adding education history.

## Education

---

### New York Univeristy, U.S

Sales, Marketing

Jan 1, 2012 - Present

#### Add Education History

Institution\*

Location\*

Degree\*

Field of Study\*

Start Date\*



End Date



Present

Save

Cancel

#### Work History

The *Work History* allows you to view, edit, and add work history records. To edit or delete the employee's education history:



- Click the **Tools** icon of the education you want to modify or remove.
- Click the **+Add Work History** link to add a new Work history

### Work History (Total 0.1 year of experience)

---

Encoder(Part-time) 

ABC, Manila

Jan 1, 2013 - Present

sample

sample

[+Add Work History](#)

Edit

Delete

This opens the menu for adding work history

## Work History (Total 0.1 year of experience)

---

### Encoder(Part-time)

ABC, Manila

Jan 1, 2013 - Present (<1 year)

sample

sample

#### Add Work History

Company Name\*

Required

Job Title\*

Required

Location\*

Required

Start Date\*

(not specified)



End Date

(not specified)



☐ Present

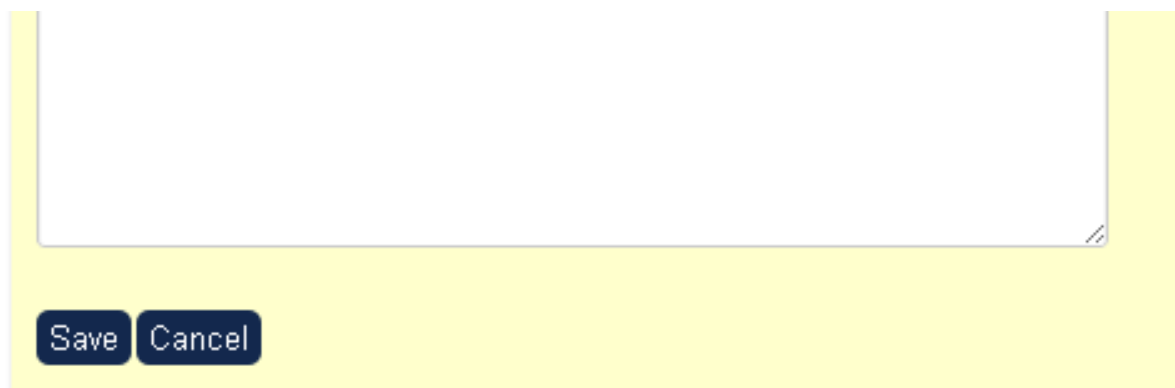
Employment Status\*

Select



Key Achievements

Awards



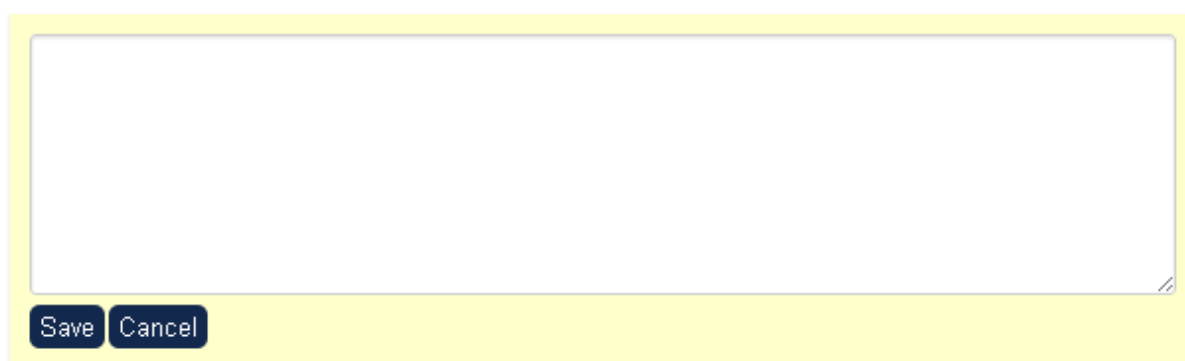
A screenshot of a web form. It features a large, empty rectangular text input area with a light gray border. Below this area, at the bottom left, are two dark blue buttons with white text: "Save" and "Cancel". The entire form is set against a light yellow background.

### Other Information

The *Other Information* allows you to enter other pertinent details about the employee.

#### Other Information

---



A screenshot of the "Other Information" form. It shows a large, empty rectangular text input area with a light gray border. Below this area, at the bottom left, are two dark blue buttons with white text: "Save" and "Cancel". The form is set against a light yellow background.

## Learning Center

(Available for Performance, learning, and eLearning only)

The employee's learning center allows the manager to view and edit the following information:

- Enrolled course
- Enrollment Request
- Records/Transcripts
- Certifications
- Training Plan
- Learning Group
- Learning Reports
- SCORM Global Objectives

### Learning Center Summary

The Learning Center summary shows the following information:

- Certifications awarded to the learner
- Training Plans
- Learning Groups

To view the summary, click **LEARNING CENTER > SUMMARY** on the **Career Development Center** menu.

K CP

AVP

solo

ID: cpk

EMPLOYEE PROFILE

LEARNING CENTER

SUMMARY

LEARNING

ENROLLMENT REQUESTS

CERTIFICATIONS

TRAINING PLAN

LEARNING PATH

PROGRESS TRACKER

LEARNING GROUP

LEARNING REPORTS

ACCOUNTS

SCORM GLOBAL OBJECTIVES

CAREER CENTER

## Learning Center Summary

Competency Training Status

Action management1	100%
Building Relationships1	100%
Business Execution1	100%
Effective Working1	100%
Employee Basics	100%
Establish Lifetime Customer Relationships1	100%
Financial Management1	100%
Initiative1	100%
People management1	100%
Strategic Thinking1	100%
Values and Ethics1	100%

Certifications Awarded

Certified Accountancy (A)
Als Certification (5600)
Annual ISO Compliance (ANNUAL-ISO-COMP)
Induction Certificate (CERT_042)

Training Plan

Learning Module/Program	Priority	Complete By
No awards have yet been made.		

In CP's learning groups (12)

## Enrolled Learning Modules

To view the enrolled learning modules, click **LEARNING CENTER > LEARNING** from the **Career Development Center** menu. Select the **Enrolled Courses** Tab. Click the course link to edit the course details.

**NetDimensions Talent Suite** CDC

**CASEY Tim**  
UNASSIGNED  
ID: cpk1

**Learning**

enrolled Courses | **Records/Transcript** | External Training Records

HIDE FILTERS

Module Title/ID:  Status:  Type:

Training undertaken between:  And:

**Filter**

Results per Page: 25

Showing: 1 - 6 of 6

Sort By: Enrol Date **Refresh**

**Behavioral Analysis (ba)** Not Started 0%  
Classroom, English, Enrolled On 22-Jan-2018 00:51 CST  
**Withdraw enrolment** **Session Transfer**

**Benefits of Listening (\_pc\_Is\_laqs3001)** Not Started 0%  
Online, English, Enrolled On 15-Oct-2017 22:12 CDT

## Session Transfer

Reviewers can transfer the sessions in the active records of users to another one. To do so, click **Session Transfer**, and then select the desired session to transfer to from the popup window.

**NetDimensions Talent Suite** CDC

**CASEY Tim**  
UNASSIGNED  
ID: cpk1

**Learning**

Results per Page: 25

Showing: 1 - 6 of 6

Sort By: Enrol Date **Refresh**

**Behavioral Analysis (ba)** Not Started 0%  
Classroom, English, Enrolled On 22-Jan-2018 00:51 CST  
**Withdraw enrolment** **Session Transfer**

**Session Transfer**

Current Session: Behavioral Analysis (02-Jul-2018 09:00 - 05-Jul-2018 20:00)

Select a target session:

21-May-2018 09:00 (Room 1)

06-Aug-2018 09:00 (Room 1)

03-Sep-2018 09:00 (Room 1)

**Transfer** **Cancel**

## Enrollment Requests

(Available for Performance and Learning only)

To view the enrollment request, click the **Learning Center > Enrollment Request** on the **Career Development Center** menu. The screen refreshes and displays the enrollment request. To view the status of the course, click the **Pending Approval** link.

The screenshot displays the NetDimensions Talent Suite interface. The top navigation bar includes 'NetDimensions Talent Suite' and 'CDC'. On the left, a user profile for 'K CP' (AVP solo, ID: cpk) is shown, along with a sidebar menu containing options like 'EMPLOYEE PROFILE', 'LEARNING CENTER', 'SUMMARY', 'LEARNING', 'ENROLLMENT REQUESTS' (highlighted), 'CERTIFICATIONS', 'TRAINING PLAN', 'LEARNING PATH', 'PROGRESS TRACKER', 'LEARNING GROUP', 'LEARNING REPORTS', 'ACCOUNTS', and 'SCORM GLOBAL OBJECTIVES'. The main content area is titled 'Enrollment Requests' and features an 'Overall Status' dropdown set to 'Pending Approval'. Below this is a table with columns for 'Learning Program/Module', 'Learning Type', 'Date', and 'Final Status'. A single entry is visible: 'A Business Opportunity (\_pc\_ls\_lags0121) English' with a learning type of 'Online' and a final status of 'Pending Approval'.

Learning Program/Module	Learning Type	Date	Final Status
A Business Opportunity (_pc_ls_lags0121) English	Online		Pending Approval

## Records/Transcripts

To view the records/transcripts of a learner, go to **LEARNING CENTER > Learning > Records/Transcript Tab on Career Development Center**.



The screenshot shows the 'Learning' section of the NetDimensions Talent Suite. The left sidebar contains navigation links: EMPLOYEE PROFILE, LEARNING CENTER (with sub-links: SUMMARY, LEARNING, ENROLLMENT REQUESTS, CERTIFICATIONS, TRAINING PLAN, LEARNING PATH, PROGRESS TRACKER, LEARNING GROUP, LEARNING REPORTS, ACCOUNTS, SCORM GLOBAL OBJECTIVES), and CAREER CENTER. The main content area is titled 'Learning' and has three tabs: 'Enrolled Courses', 'Records/Transcript' (selected), and 'External Training Records'. Below the tabs is a filter section with fields for 'Module Title/ID', 'Status' (All), 'Type' (All), and 'Training undertaken between' (e.g. Dec 28, 2017). A 'Filter' button is present. The results show 1 - 8 of 8 items. A table lists the learning modules with columns for Bulk Action, Learning Module Name, Status, Start Date - End Date, Score, Credits, and Other Information. The table contains six rows of data for various modules like 'Behavioral Analysis (ba)', 'Acting Decisively', 'An Introduction to Project Management (PROJ0511)', 'Feedback Behaviors', 'A Business Opportunity', and 'Anticipating and Solving Problems as a Project Champion'. Buttons for '+ Assign learning module' and 'Print' are visible above the table.

Bulk Action	Learning Module Name	Status	Start Date - End Date	Score	Credits	Other Information
	Behavioral Analysis (ba) English	Waitlisted	Jan 15, 2018 10:00 AM - Jan 18, 2018 5:30 PM HKT		0	Residential (UX1): No Required: No
	Acting Decisively (_pc_ch_lach034) English	Completed	Aug 17, 2017 10:21 AM - Aug 17, 2017 10:21 AM HKT		0.25	Residential (UX1): No Required: No
	An Introduction to Project Management (PROJ0511) English	In Process	Jul 12, 2017 1:30 PM HKT		2.5	Residential (UX1): No Required: No
	Feedback Behaviors (_pc_ls_paq0601) English	Completed	Jul 11, 2017 3:24 PM - Jul 11, 2017 3:24 PM HKT		0.05	Residential (UX1): No Required: No
	A Business Opportunity (_pc_ls_laqs0121) English	Pending Approval		90%	0.083	Residential (UX1): No Required: No
	Anticipating and Solving Problems as a Project Champion (_pc_bi_pmbi007) English	Not Started			0.083	Residential (UX1): No Required: No

The screen lists all the currently enrolled learning programs/modules of the selected participant and it displays the start dates, enrollment information and results (score). From this screen you can:

- View and update, and print a copy of the participant's transcript records for a specific learning module or program.
- Print a report of your participant's transcript records for multiple learning objects.

### View Records/Transcript

1. Click the desired course, or select **View Transcript Details** from the Gear Icon.
2. The Records / Transcript will be displayed. Amend the attribute(s) if required.

**NetDimensions Talent Suite** **CDC**

**K CP**  
AVP  
solo  
ID: cpk

EMPLOYEE PROFILE

LEARNING CENTER

SUMMARY

**LEARNING**

ENROLLMENT REQUESTS

CERTIFICATIONS

TRAINING PLAN

LEARNING PATH

PROGRESS TRACKER

LEARNING GROUP

LEARNING REPORTS

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SCORM GLOBAL OBJECTIVES

CAREER CENTER

### Learning

Enrolled Courses | **Records/Transcript** | External Training Records

#### Behavioral Analysis (ba)

**Details**

[ [Transcript History](#) ]

Last modified by [redacted] on Dec 21, 2017 10:49 AM HKT

Enrollment Date: Dec 13, 2017 3:41 PM HKT

Start Date: Jan 15, 2018 10:00 AM HKT

End Date: Jan 18, 2018 5:30 PM HKT

Due Date:

Credits: 0.00

Overall Status: Waitlisted

Learning Module Type: Classroom

Residential (UX1): No

ID:

Required: No

Additional Comments:

Points:

CPD-Structured-Hrs:

CPD-Unstructured-Hrs:

9.3 Attribute:

JEA Ed Credit:

MA-Prijs per eenheid (2015):

MA-Prijs per eenheid (2016):

MA-PPE15:

MA-PPE16:

Comments:

Instructors:

- KENT Clark (CLARK.KENT)
- FOX Adam (ADAM.FOX)

Venue:

- Room 1

Attendance:

Assessment Date:

Performance Grade:

3.To view the chronicles of the Transcript, click [ **Transcript History** ]. The Transcript History will be shown as an overlay.

The screenshot shows the 'Learning' section of the NetDimensions Talent Suite. The user is logged in as K CP (AVP solo, ID: cpk). The 'Records/Transcript' tab is selected. The 'Transcript History' section shows a table with 2 records. Below the table, there are filters for 'Attendance' (set to NO) and 'Assessment Date' (set to e.g. Dec 28, 2017).

Date	Action	Session Title(ID)	Overall Status	Enrollment Date	Start Date	End Date	Modified By	Channel
Dec 21, 2017 10:49 AM HKT	Date Change	Basic Course (B 1)	Waitlisted	Dec 13, 2017 1:41 AM HKT	Jan 15, 2018 10:00 AM HKT	Jan 18, 2018 5:30 PM HKT	K CP	Catalog Editor
Dec 13, 2017 3:41 PM HKT	Create	Basic Course (B 1)	Waitlisted	Dec 13, 2017 1:41 AM HKT	Dec 18, 2017 10:00 AM HKT	Dec 21, 2017 5:30 PM HKT	K CP	Self

**Note:** To view **Transcript History**, **GENERAL SETTINGS > System Configuration > Records/Transcript > Enable Transcript History** must be checked.

4. Click **Save / Print**.

### Print Records/Transcripts Report

1. Click the **Print** button.
2. Select the learning modules and learning programs whose transcripts are to be printed. Click **Print Preview** to see the Records/Transcripts.

The screenshot shows the 'Records/Transcript' page for user SANTOS VINA (UNASSIGNED, ID: empno005). The page includes a sidebar with navigation options like Employee Profile, Learning Center, and Career Center. The main content area has a 'Select the learning modules and learning programs' section with a 'Select learning modules/programs' link. Below this, there are checkboxes for 'Include External Training Records', 'Start Date' (not specified), 'End Date' (not specified), and 'Summarized Report' (No). A 'Print Preview' button is at the bottom.

3. Optionally, select a start date to return transcripts completed after the specified date and/or an end date to return transcripts completed before the specified date. Choose whether fully detailed transcripts or a summarized report is required. This leads you to preview of the Records/Transcripts reports.

**Please print a copy of this report and give it to your supervisor during your review.**

**Print**

Name: SANTOS Vina

Job Title:

Join Date: Date to be confirmed

Organization Level: UNASSIGNED

Completion Date: All

Course Title	Completed/End Date	Hours	Score	Post-assessment Score	Status
Module M1		0.0			Not Started
Module - Online - Computer 1		0.0			Pending Approval
Module - Online - English 1		0.0			Pending Approval
Module - Online - Math 1		0.0			Pending Approval


4. Click the **Print** button to print the report.

### Adding External Record

1. On **Career Development Center**, go to **LEARNING CENTER > Learning > External Training Records** Tab, click **+ Add external record**.
2. Input the necessary attributes.
3. Click **Create**.

NetDimensions Talent Suite

CDC



K CP

AVP

solo

ID: cpk

EMPLOYEE PROFILE

LEARNING CENTER

SUMMARY

**LEARNING**

ENROLLMENT REQUESTS

CERTIFICATIONS

TRAINING PLAN

LEARNING PATH

PROGRESS TRACKER

LEARNING GROUP

LEARNING REPORTS

ACCOUNTS

SCORM GLOBAL OBJECTIVES

CAREER CENTER

## Learning

This form may be used to record training history earned outside of this system.

Title\*:

Course Type:

(not specified)

▼


Subject:

\_SUBJECT-12

▼


Start Date\*:

e.g Dec 28, 2017



End Date\*:

e.g Dec 28, 2017



Autofill

Venue:

Language:

(not specified)

▼

Duration:

0.0

Hour(s) ▼

Course Cost:

0.0

United States of America, Dollars ▼

Grade:

Score:

Vendor Information:

Comments:

Attachment:

Choose File

No file chosen

Status\*:

(Select)

▼

?

(\* Mandatory fields)

Create

4. An acknowledgement appears. Click **OK** to confirm. The new external record has been created.

NetDimensions Talent Suite CDC

K CP  
AVP  
solo  
ID: cpk

EMPLOYEE PROFILE

LEARNING CENTER

SUMMARY

**LEARNING**

ENROLLMENT REQUESTS

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CAREER CENTER

### Learning

Enrolled Courses Records/Transcript **External Training Records**

HIDE FILTERS

Module Title/ID Status Type

Training undertaken between And

e.g Dec 28, 2017 e.g Dec 28, 2017

Filter

Results per Page: 25

Showing: 1 - 1 of 1

Bulk Action + Add external record Print

	Learning Program/Module	Date	Status	Type	Score	Duration	Attachment
	Excel Basics	Dec 28, 2017 - Dec 29, 2017	Open for editing	Classroom	92	8.0 Hour(s)	

Showing: 1 - 1 of 1

The amount of transcript information that is visible to you will depend on role access control, organization settings, and system configurations. For full transcript detail visibility, you will see the full detail of the transcript:

## Records/Transcript

### Maritime Navigation

#### Details

Enrollment Date: Jul 22, 2013 10:44 AM CST

Start Date: Jul 22, 2013 10:44 AM CST

End Date: Jul 22, 2013 10:45 AM CST

#### Exam

#### Progress

Completion Date: Jul 22, 2013 10:45 AM CST

Lesson Status: Passed

Total Training Time: 00:00:12

Total # of Online Launches: 1

Last Attempted Date: Jul 22, 2013 10:45 AM CST

Score: 5

#### Interactions

ID	Objective ID	Time	Type	Correct Responses	Weighting	User Response	Result	Latency
Q1			choice	4		4	correct	
Q2			choice	2		2	correct	
Q3			choice	3		3	correct	
Q4			choice	2		2	correct	
Q5			choice	1		1	correct	

[Launch history](#)

[Print](#)

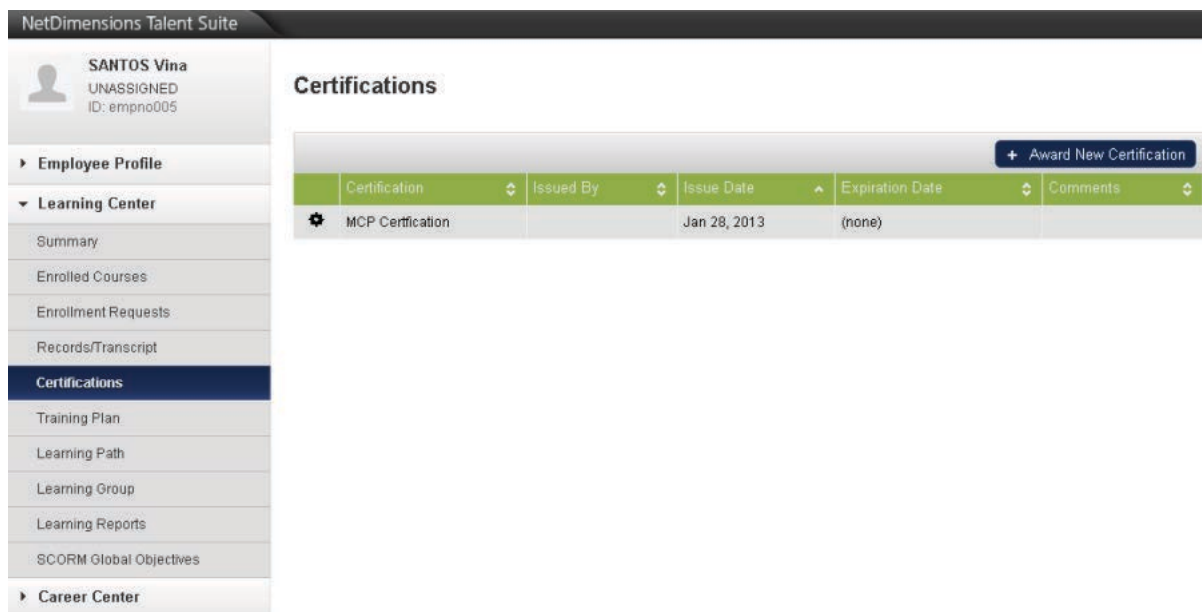
[Back](#)

## View Certifications

Certifications are externally completed qualifications (perhaps from some standards organization) that are directly assigned, or an internally specified requirement that is awarded based on the completion of specific exams or modules provided by this system.

To view Certifications: On the **Career Development Center** menu, click the **Learning Center > Certifications**. The list of certifications will be displayed on the screen.





NetDimensions Talent Suite

SANTOS Vina  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
  - Summary
  - Enrolled Courses
  - Enrollment Requests
  - Records/Transcript
  - Certifications**
  - Training Plan
  - Learning Path
  - Learning Group
  - Learning Reports
  - SCORM Global Objectives
- Career Center

### Certifications

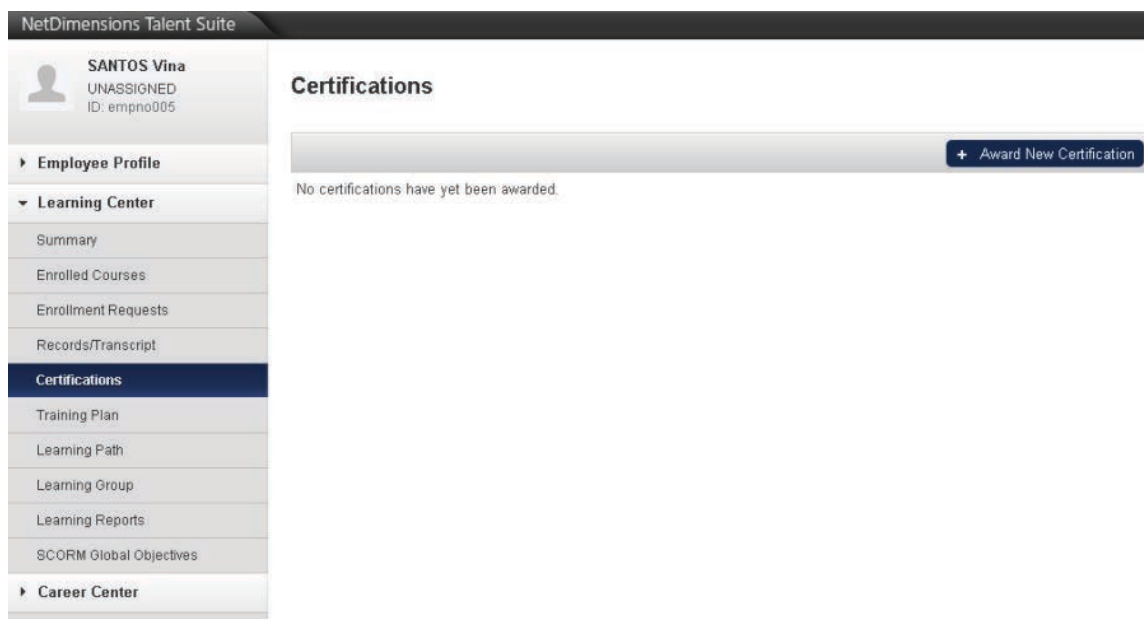
+ Award New Certification

Certification	Issued By	Issue Date	Expiration Date	Comments
MCP Certification		Jan 28, 2013	(none)	

### Awarding a New Certification

To award a new certification:

1. On the **Career Development Center > Learning Center > Certifications**, click the **+Award New Certification** button:



NetDimensions Talent Suite

SANTOS Vina  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
  - Summary
  - Enrolled Courses
  - Enrollment Requests
  - Records/Transcript
  - Certifications**
  - Training Plan
  - Learning Path
  - Learning Group
  - Learning Reports
  - SCORM Global Objectives
- Career Center

### Certifications

+ Award New Certification



No certifications have yet been awarded.

2. Select a certificate and enter Issue Date and Comments:

## Add Certification for SANTOS Vina (EMPNO005)

Select a certification for assignment below.

**Certification:**

**Issue Date:**   

**Comments:**

**Award Certification** **Close**

3. Click Award Certification.

### Viewing Certification

To view certification, go to **Career Development Center > Learning Center > Certifications**. Here users can view the current and expired certificates.

#### Certifications Awarded To ATOM Aaron

<div> <div>All</div> <div> <div>All</div> <div>Current Certificates</div> <div>Expired Certificates</div> </div> </div>					
Certification	Issued By	Issue Date	Expiration Date	Comments	
  My Cert 01	My Cert Inc.	Oct 9, 2012	Oct 14, 2012	Course Completion Award (MOD-0003)	
 Private Cert		May 8, 2013	May 8, 2014	Award new certificate	
  My Cert 01	My Cert Inc.	Jan 1, 2013	Dec 31, 2013	dummy	

### Printing the Certificate

To print the certificate, go to the **Career Development Center** menu, click the **Learning Center > Certifications**. Click the **Tools** icon of the certification you want to print and then select **Print**.

NetDimensions Talent Suite

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

Employee Profile

Learning Center

- Summary
- Enrolled Courses
- Enrollment Requests
- Records/Transcript
- Certifications**
- Training Plan
- Learning Path
- Learning Group
- Learning Reports
- SCORM Global Objectives

Career Center

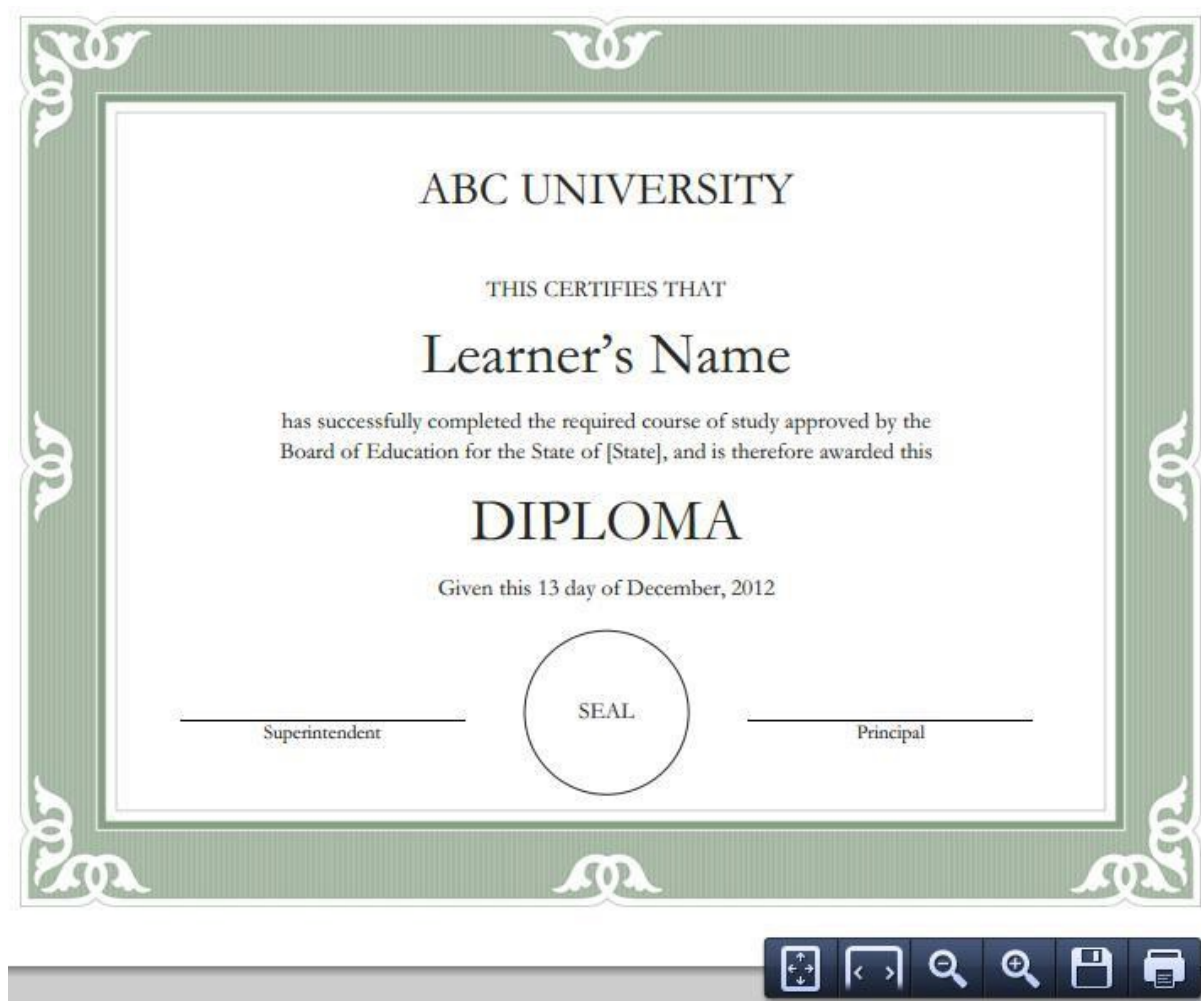
### Certifications

+ Award New Certification

Certification	Issued By	Issue Date	Expiration Date	Comments
MCP Certification		Jan 28, 2013	(none)	

Print  
Delete

The actual *Certification* is displayed on the screen. Click the **Print** button to generate a print copy or hard copy of the certification.



## Training Plan

A training plan consists of recommendations prepared by a manager or appraiser. To view training plans go to the **Career Development Center** menu, click the **Learning Center > Training Plan**. A list of learning modules/programs appears.

NetDimensions Talent Suite

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

Employee Profile

Learning Center

Summary

Enrolled Courses

Enrollment Requests

Records/Transcript

Certifications

**Training Plan**

Learning Path

Learning Group

Learning Reports

SCORM Global Objectives

Career Center

### Training Plan

Click on a radio button to select a specific entry to edit.

+ Create Entry

Learning Module/Program	Suggested By	Comments	Priority	Complete By	Action
<input type="radio"/> Classroom Course on CNC Lathe (MOD-0000)	MOLINA Alon (NETDALON)		Medium		<a href="#">Go to Catalog Page</a>
<input type="radio"/> Basics Of CNC Lathe (MOD-0006)	MOLINA Alon (NETDALON)		Medium		<a href="#">Go to Catalog Page</a>

Edit Selection Delete Selection

### Adding New Training Plan

To add a new entry, go to the **Career Development Center > Learning Center > Training Plan**



1. click the **+Create Entry** button.
2. Click the **Select** button to choose from the available learning modules,
3. enter other details such as comment, priority and completion date.
4. Once completed, click the **Save Suggestions** button.

### Training Plan

Learning Program/Module:  **Select...**

Comment (max. 255 characters):

Priority:

Complete By:   

**Save Suggestions** **Cancel**

Once created, you can edit or delete the entry as necessary.

### Learning Path

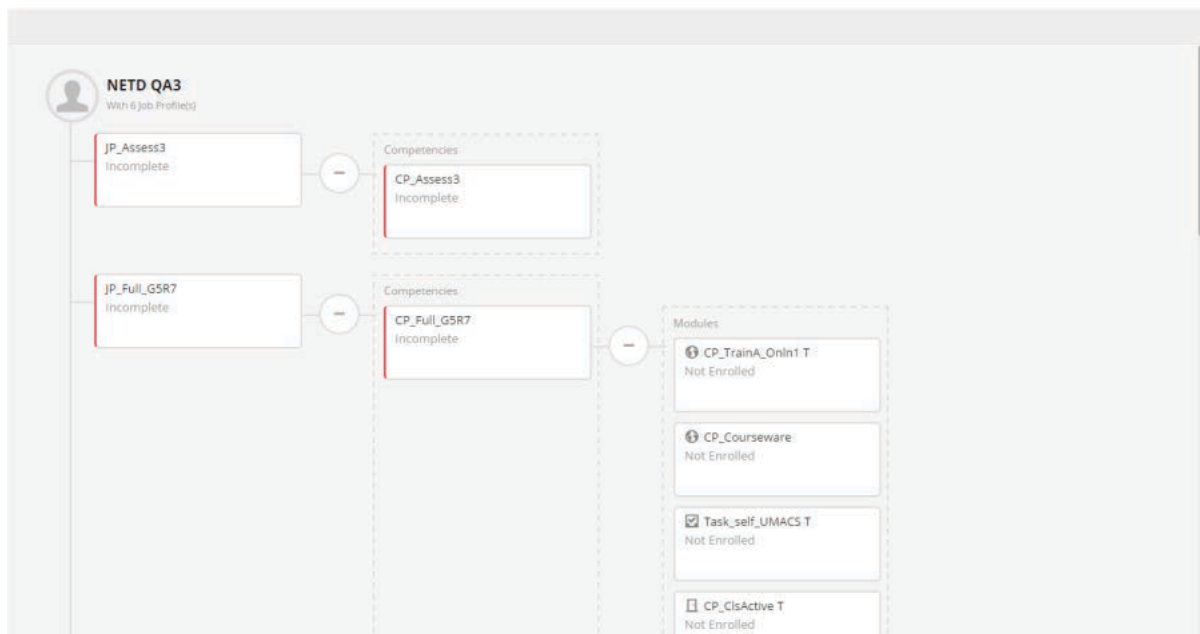
The Learning Path UI is designed to display status information with clarity, with detailed information being accessible via drilling down on a particular item, with individual items being expandable, collapsible or draggable depending on the space needed to present said information.

Each item is represented by a card, a thin strip of color bar on the left hand to indicate the status of the item. A red on a job profile indicates it is not complete while a green indicates completion. A red on a competency indicates it is incomplete, an amber with exclamation indicates it is in a grace period for renewal or it's expired already or all related modules are *In Process* or above and a green means that it's complete. The status color of a module follows the same status icon color of the transcript, for examples, *Not Enrolled* (no color), *Deactivated* (gray), *Not Started* (blue), *In Process* (amber), *Failed/Pending Approval/Deadline Expired* (red) and *Completed/Waiver Exempt* (green).

There is a plus or minus icon to expand or collapse on an item showing sub-items belonging to the hierarchy with a surrounding dotted box to clearly convey the concise partitioning of the particular hierarchical relationships. This is graphically intuitive when it comes to complex structure display of composite programs or module with substitute information. Completed substitutes are shown that contribute to fulfilling a module requirement. There is also a way to display incomplete substitutes which allows a user to see alternative paths of working on substitute modules that will eventually lead to completing a target module.

Lastly, the entire Learning Path can be dragged to focus on a particular portion of the structure in case the entire structure is too wide or long to view. Similarly, the Training Plan section is displayed with the same UI design.

#### LEARNING PATH



Mouse over on a particular item card will pop up a Details button for the user to drill down the detailed information on that item. There is an overlay popup to display the summarized information of the item with the appropriate redirect button to view the details page of that item like to go to the description page of the object.

LEARNING PATH

NETD QA23  
With 0 Job Profile(s)

Training Plan

Modules

Adhoc Title O1forPP10  
Completed (Self-Asserted)

**Learning Module Details**

**Adhoc Title O1forPP10**

Learning Type: Online  
Status: Completed (Self-Asserted)  
Language: English  
Finish Date: Jun 17, 2015  
Description: (not specified)

Close View Catalog Details

Or go to the Knowledge Center if the transcript is still in an active state.

LEARNING PATH

JP\_Grace0  
Incomplete

Competencies

CP\_Grace0

**Learning Module Details**

**CP\_Grace0\_Onln1 T**

Learning Type: Online  
Status: In Process  
Language: English  
Description: Mandatory Course created for Competency CP\_Grace0

Close Go To Knowledge Center

Modules

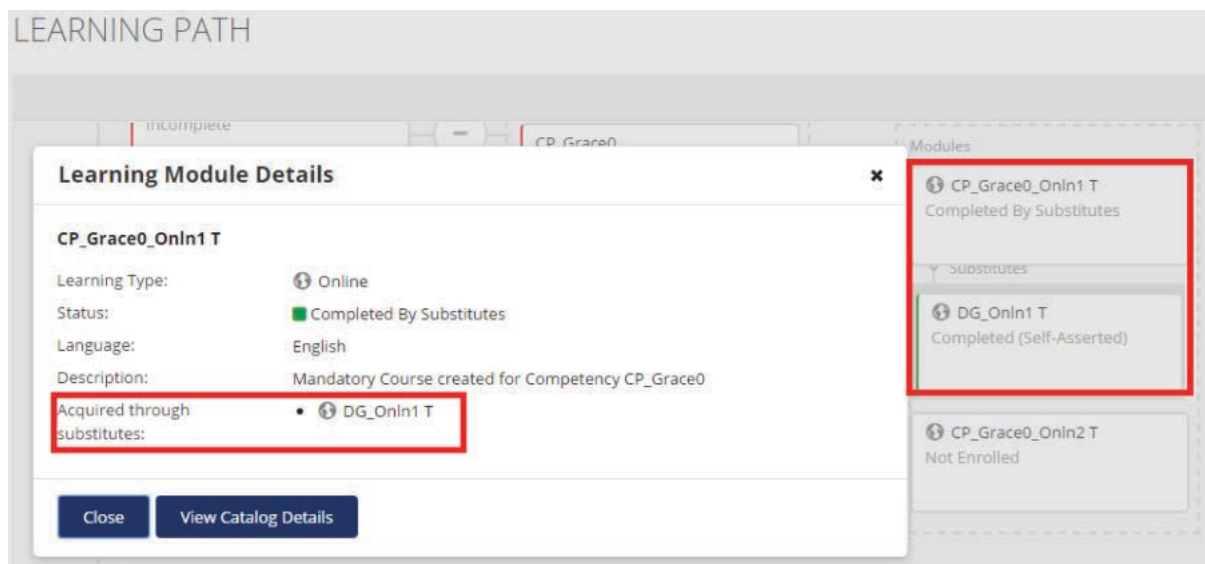
CP\_Grace0\_Onln1 T  
In Process

Substitutes

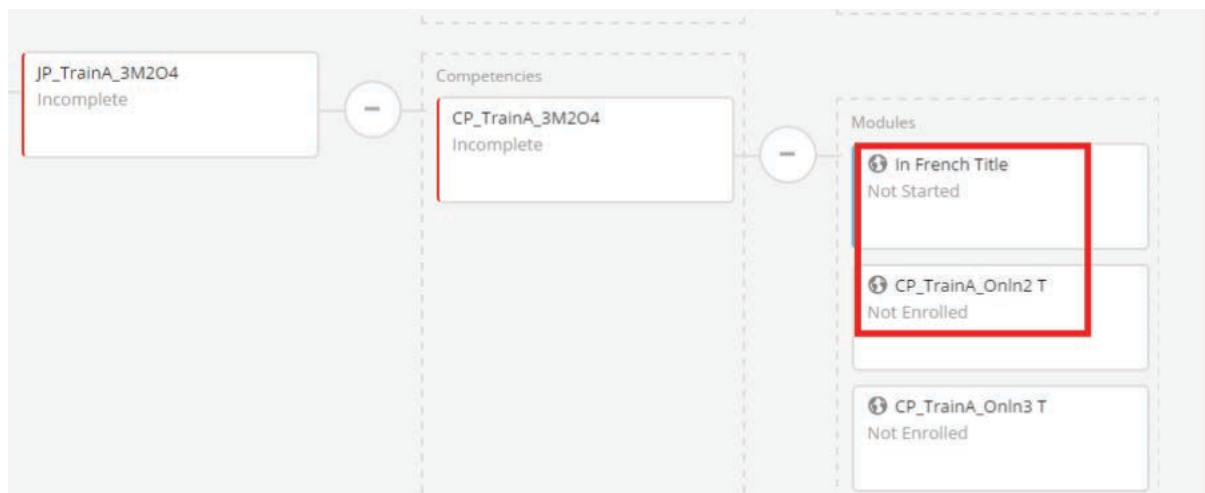
DG\_Onln1 T  
In Process

CP\_Grace0\_Onln2 T  
Not Enrolled

The summarized popup information includes showing the substitute information of a target module.

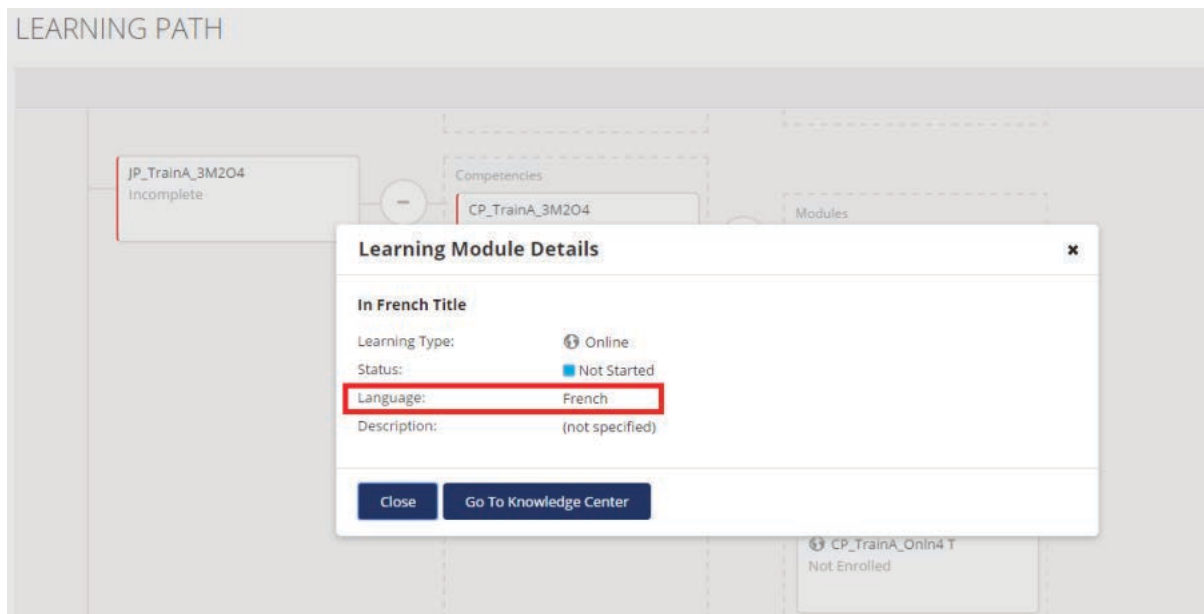


Multi-Language information is reflected on the Learning Path as well. The course title and description are displayed in the language that the user has actually taken the course; in case of not enrolling in it yet then display in the preference language of the user or in the primary language.



A new Language indicator is also shown to denote the language that the user has taken this course in.





## View Learning Group

The Learning Group allows you to see the list of participants who enrolled on the same learning module s. To view learning group, go to **Career Development Center > Learning Center > Learning Group**. The learning group displays the participants enrolled in the same learning module. Clicking the participant in the learning group opens the participant's profile in a separate window.

The screenshot displays the NetDimensions Talent Suite interface. On the left is a sidebar menu with the following items: Employee Profile, Learning Center (expanded), Summary, Enrolled Courses, Enrollment Requests, Records/Transcript, Certifications, Training Plan, Learning Path, Learning Group (highlighted), Learning Reports, SCORM Global Objectives, and Career Center. The main content area is titled 'Learning Group' and shows 'In Vina's learning groups (5)' with five placeholder icons for group members. At the top of the sidebar, the user profile for Santos Vina is shown with the status 'UNASSIGNED' and ID 'empno005'.


## View Learning Reports

The learning reports provide you access on the two learning reports, namely:

- Learning Modules Report
- Learning Programs Report To view learning reports:

Proceed to **Career Development Center** menu, click **Learning Center > Learning Reports**. From here, you can now start generating reports for learning modules or learning programs.

NetDimensions Talent Suite



**SANTOS Vina**  
UNASSIGNED  
ID: empno005

Employee Profile

Learning Center

Summary

Enrolled Courses

Enrollment Requests

Records/Transcript

Certifications

Training Plan

Learning Path


Learning Group


**Learning Reports**

SCORM Global Objectives

Career Center

Learning Reports



**Learning Modules Report**  
Individual Participant Report on Learning Modules.


**Learning Programs Report**  
Individual Participant Report on Learning Programs.

## View SCORM Global Objectives

A SCORM course may report **global objectives**. Not all SCORM courses do this, but for those that do, the objectives set will be displayed in the *SCORM Global Objectives* tab of the Career Development Center when reviewing a learner.

NetDimensions Talent Suite



**SANTOS Vina**  
UNASSIGNED  
ID: empno005

Employee Profile

Learning Center

Summary

Enrolled Courses

Enrollment Requests

Records/Transcript

Certifications

Training Plan

Learning Path

Learning Group

Learning Reports

**SCORM Global Objectives**

Career Center

SCORM Global Objectives

No global objective values have been set for the user.

## Employee's Career Center

(Available for Performance and Learning only)

The employee's career center allows the manager to view and edit the following information:

- Job Profiles
- Competencies
- Training Gap Analysis
- Goals
- Performance Review

### Career Center Summary

The Career Center Summary shows the learner's performance review in process and its status. To view the career center summary, go to **Career Development Center > Career Center > Summary**.

The screenshot shows the 'Career Center Summary' page for employee SANTOS Vina (UNASSIGNED, ID: empno005). The left sidebar contains a navigation menu with options: Employee Profile, Learning Center, Career Center (expanded), Summary (selected), Job Profiles, Competencies, Training Gap Analysis, Goals, and Performance Review. The main content area is titled 'Career Center Summary' and includes a section 'Performance Reviews in Process' with a table showing a review for 'Competencies' with a status of 'Started'. Below this is a 'Competency Completion Status' section with a table showing completion percentages for various competencies.

Template Name	Status
Competencies	Started

Competency Completion Status	
Lathe Operations	100%
Facilitating Change	100%
Systems integration	100%
Java	100%
Training Competency	0%

### Job Profiles

A Job Profile is a collection of competencies that describe a learner's overall training needs, based on the expected knowledge requirements of particular jobs. These profiles are usually directly assigned by a manager or administrator. Learners can have multiple job profiles.

#### User Review in Job Profiles

The User Review page shows the user's Job Profile information which has a filtering feature that allows the Job Profile Administrator to focus on a particular set of users. It also allows administrators to review a user's Job Profile completion status, and drill down to the competency and module level. There is also an optional "Competency Profile as of" filter criteria available for CFR licenses. This allows users to view a user's competency profile as of a past date.

The screenshot shows the 'User Review' page in the Job Profile Editor. The sidebar on the left has 'User Review' highlighted. The main content area has a 'Filter Criteria' section with the following fields:

- Organization: Click to select
- Job Title: All Job Titles
- First Name:
- Last Name:
- Job Profile Status: All
- Competency Profile as of: Oct 23, 2013
- Show learners with closed accounts: ☐
- Filter: [Button]

Below the filter section is a table of users with the following columns: Name, Job Profiles, and a 'Drilldown Job Profile Status' link. The table lists three users:

Name	Job Profiles	Drilldown Job Profile Status
ADMINISTRATOR System ALL/UNASSIGNED	JP1	
APPRAISER New Org1.1/Hong Kong	JP1	Drilldown Job Profile Status
STUDENT 1 Domain 1 Org1/Org1.1	JP1	

The 'Drilldown Job Profile Status' link for the APPRAISER New user shows a tree of competencies and learning modules:

- Job Profiles (1)
  - JP1
    - Required Competencies (3)
      - C1 - Level 1
        - C5 - Level 2 (Required Level 1)
          - Optional Learning Modules (1 Required of 1)
            - P4
              - Session Modules
                - P3
                  - C2 - Level 1

*The User Review page in the Job Profile Editor*

The de-assignment of Job Profiles can also be done in the User Review page. Both bulk de- assignment and individual de-assignment are available in the User Review page.

The screenshot shows the 'Bulk Action' dropdown menu in the User Review page. The dropdown is open, showing the following options:

- Bulk Action
- De-Assign Job Profile

The table below shows three users:

| Name                                   | Job Profiles |
|--|--------------|
| ADMINISTRATOR System<br>ALL/UNASSIGNED | JP1          |
| APPRAISER New<br>Org1.1/Hong Kong      | JP1          |
| STUDENT 1 Domain 1<br>Org1/Org1.1      | JP1          |

The 'De-Assign Job Profile' link is also visible in the table for the APPRAISER New user.

*Two facilities to de-assign Job Profiles*

### Job Profile Administrators Can View Transcript Details

Job Profile administrators can now view the transcripts of learners from **Job Profiles > User Review** in order to track progress on Job Profile completion.

The screenshot shows the 'User Review' interface. At the top, there's a 'Bulk Action' dropdown and a 'Results per Page' selector set to 10. Below this is a table with columns 'Name' and 'Job Profiles'. The first user listed is 'ATOM Aaron' with 'Job Profile Nested Program'. A tree view on the left shows the hierarchy: Job Profiles (1) > Job Profile Nested Program > Required Competencies (1) > Competency Nested Program - Level 1 (Required Level 1) > Required Learning Modules (1) > PROG-01-P > Session Modules > PROG-01-C. A red box highlights the 'Records/Transcript' link next to the 'PROG-01-C' module. The second user listed is 'BROWN Brian' with a warning icon and 'Job Profile Nested Program'.

Records/Transcript link is displayed on mouse hover/click on modules.

#### Note:

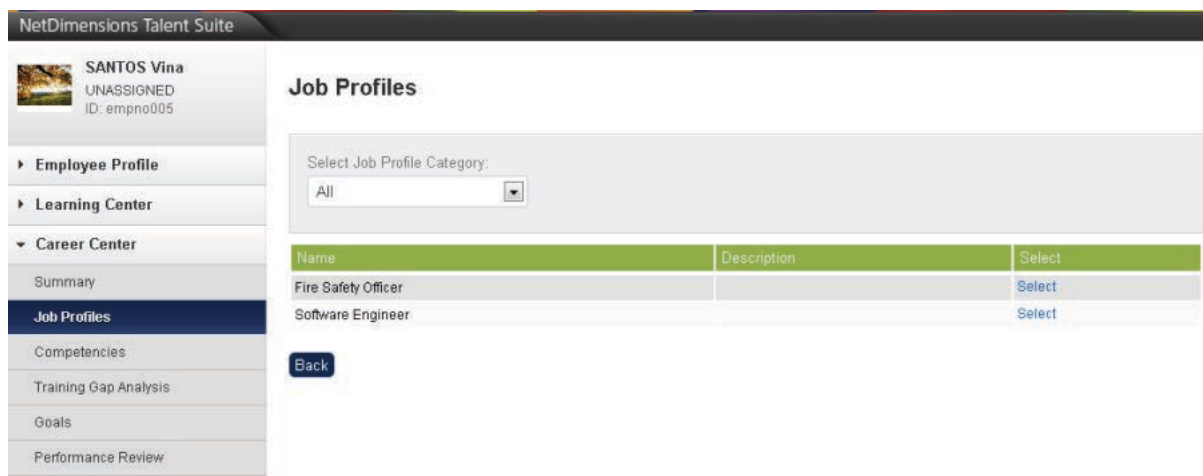
1. Transcript link is not available for past dates.
2. When a learner has enrolled on a module multiple times, the system will always display the latest transcript contributing to the Job Profile.
3. Job Profile administrators with Access Control **"Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail"** can always access learners' transcripts.
4. Job Profile administrators who are also the instructors of a course can always access learners' transcripts
5. Transcript detail honors the visibility setting on Organization Member Permissions (i.e., no link if "Reviewers in general" setting is **"Completion Status Only"**).

#### Assigning a Job Profile

To assign a job profile, go to **Career Development Center > Career Center**, click the **Job Profiles** tab. Click the **Assign Job Profile** button. The menu for selecting job profiles appears.

The screenshot shows the 'NetDimensions Talent Suite' interface. On the left is a sidebar with a user profile for 'SANTOS Vina' (UNASSIGNED, ID: empno005) and a list of navigation options: Employee Profile, Learning Center, Career Center (selected), Summary, Job Profiles (selected), Competencies, Training Gap Analysis, Goals, and Performance Review. The main area is titled 'Job Profiles' and contains the text 'The following job profiles have been assigned.' Below this is a table with columns 'Name', 'Description', and 'Reference Code'. The table lists 'CNC Lathe Operator' with reference code 'JLO'. An 'Assign Job Profile' button is located at the top right of the table.

The menu displays the available job profiles. Click the **Select** link of the job profile you want to assigned.



NetDimensions Talent Suite

**SANTOS VINA**  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
- Career Center
  - Summary
  - Job Profiles**
  - Competencies
  - Training Gap Analysis
  - Goals
  - Performance Review

### Job Profiles

Select Job Profile Category:

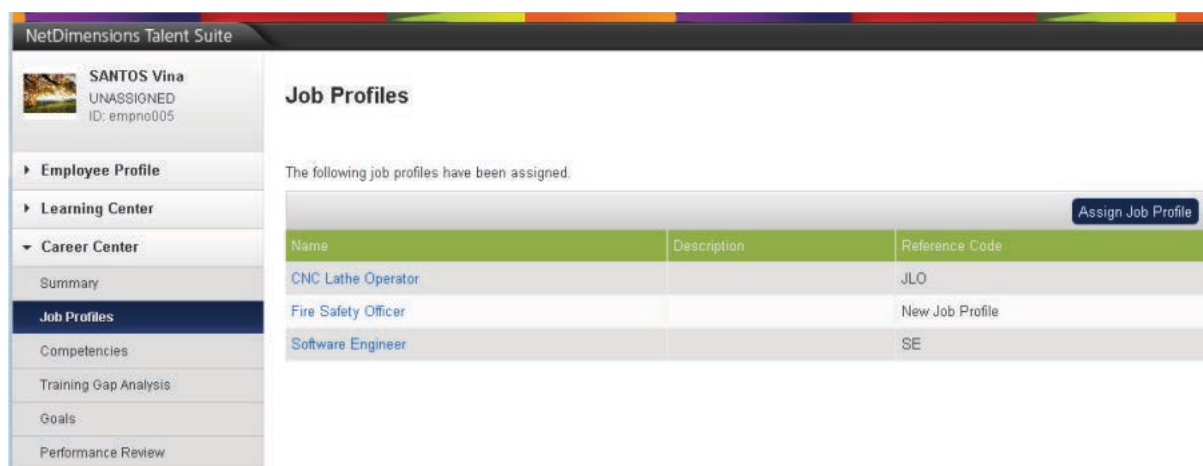
All

| Name                | Description | Select |
|---------------------|-------------|--------|
| Fire Safety Officer |             | Select |
| Software Engineer   |             | Select |

Back

### Updating the Proficiency Level

On the **Career Development Center > Career Center**, click the **Job Profiles** tab. Click the job profile you want to modify.



NetDimensions Talent Suite

**SANTOS VINA**  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
- Career Center
  - Summary
  - Job Profiles**
  - Competencies
  - Training Gap Analysis
  - Goals
  - Performance Review

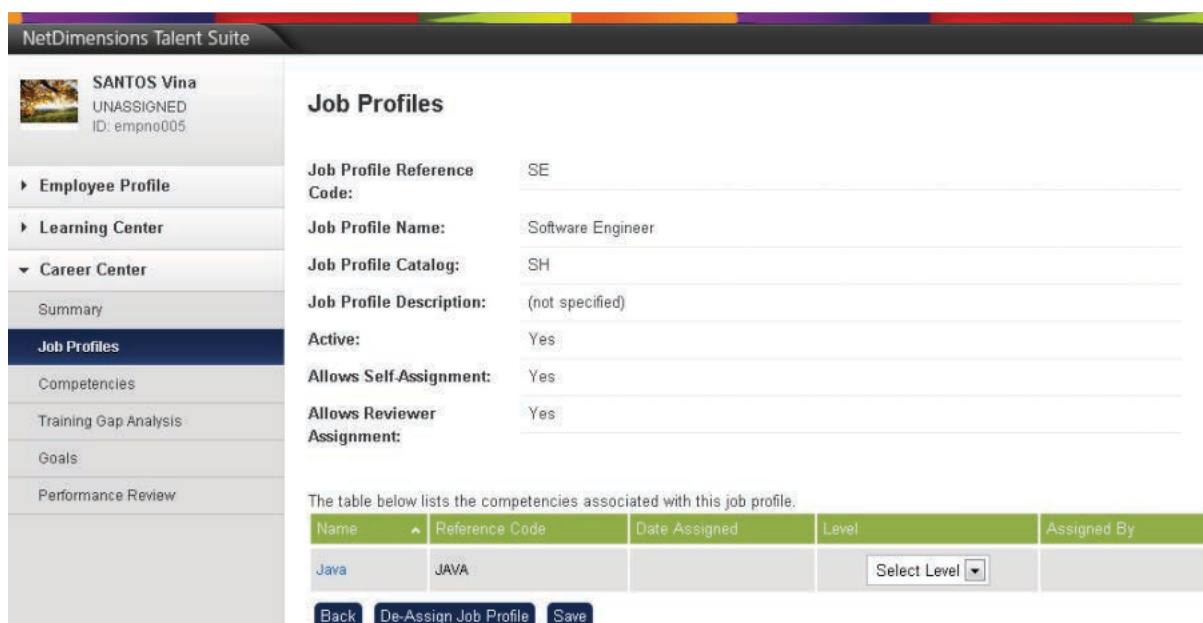
### Job Profiles

The following job profiles have been assigned.

Assign Job Profile

| Name                | Description | Reference Code  |
|---------------------|-------------|-----------------|
| CNC Lathe Operator  |             | JLO             |
| Fire Safety Officer |             | New Job Profile |
| Software Engineer   |             | SE              |

The job profile details appear on the screen. To change the proficiency level, click the **Select Level** drop down button.



NetDimensions Talent Suite

**SANTOS VINA**  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
- Career Center
  - Summary
  - Job Profiles**
  - Competencies
  - Training Gap Analysis
  - Goals
  - Performance Review

### Job Profiles

Job Profile Reference Code: SE

Job Profile Name: Software Engineer

Job Profile Catalog: SH

Job Profile Description: (not specified)

Active: Yes

Allows Self-Assignment: Yes

Allows Reviewer Assignment: Yes

The table below lists the competencies associated with this job profile.

| Name | Reference Code | Date Assigned | Level        | Assigned By |
|------|----------------|---------------|--------------|-------------|
| Java | JAVA           |               | Select Level |             |

Back De-Assign Job Profile Save



The menu for selecting the proficiency level appears. Select the proficiency level.

NetDimensions Talent Suite

SANTOS Vina  
UNASSIGNED  
ID: empno005

Job Profiles

Job Profile Reference: SE

Employee Profile

Learning Center

Career Center

Summary

Job Profiles

Competencies

Training Gap Analysis

Goals

Performance Review

Assigned By

Java

Back De-Assign Job Profile Save

**Select a level**

Java

| Level | Description   |
|-------|---|
|       | Does not meet any criteria  |
| 1     | Common Knowledge and understanding of basic techniques and concepts |
| 2     | Default Proficiency Level   |
| 3     | Able to complete tasks as requested with help from time to time     |
| 4     | Can complete tasks without assistance                               |
| 5     | A known expert in respective area                                   |

This return to job profile details with the new proficiency level displayed. Click the **Save** button to keep the changes.

NetDimensions Talent Suite

SANTOS Vina  
UNASSIGNED  
ID: empno005

Job Profiles

Job Profile Reference: SE

Job Profile Name: Software Engineer

Job Profile Catalog: SH

Job Profile Description: (not specified)

Active: Yes

Allows Self-Assignment: Yes

Allows Reviewer Assignment: Yes

The table below lists the competencies associated with this job profile.

| Name | Reference Code | Date Assigned | Level   | Assigned By |
|------|----------------|---------------|---------|-------------|
| Java | JAVA           |               | Level 3 |             |

Back De-Assign Job Profile Save

### De-Assigning Job Profile

On the **Career Development Center > Career Center**, click the **Job Profiles** tab. Click the job profile you want to de-assign.

NetDimensions Talent Suite

SANTOS Vina  
UNASSIGNED  
ID: empno005

Job Profiles

The following job profiles have been assigned.

Assign Job Profile

| Name                | Description | Reference Code  |
|---------------------|-------------|-----------------|
| CNC Lathe Operator  |             | JLO             |
| Fire Safety Officer |             | New Job Profile |
| Software Engineer   |             | SE              |

Employee Profile

Learning Center

Career Center

Summary

Job Profiles

Competencies

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Performance Review

The job profile details appear on the screen. To de-assign job profile, click the **De-Assign Job Profile**



drop down button. After which, the screen returns to **Job Profile** tab.

**Job Profiles**

Job Profile Reference Code: SE

Job Profile Name: Software Engineer

Job Profile Catalog: SH

Job Profile Description: (not specified)

Active: Yes

Allows Self-Assignment: Yes

Allows Reviewer Assignment: Yes

The table below lists the competencies associated with this job profile.

| Name | Reference Code | Date Assigned | Level        | Assigned By |
|------|----------------|---------------|--------------|-------------|
| Java | JAVA           |               | Select Level |             |

Back De-Assign Job Profile Save

## Competencies

All completed competency assessments and competencies acquired by the user are listed at Review CDC > Career Center > Competencies:

**Competencies**

The competencies listed below have been awarded. Although many competencies are awarded by administrators, you can click on the button below to search for competencies that you are allowed to directly add to your personal record.

+ Award Competency

| Name                                 | Description   | Date Assigned            | Proficiency Levels | Level Code | Assigned By                    |
|--------------------------------------|---|--------------------------|--------------------|------------|--------------------------------|
| Data analysis                        | The investigation, evaluation, interpretation and classification of data, in order to define and clarify information structures which describe the relationships between real world entities. Such structures... (Show All) | Nov 29, 2017 3:09 PM CST | 3                  | 5          | System Administrator (NDADMIN) |
| Porting/software integration         | The integration of software products into existing software environments to produce new platform-specific versions of the software products.  | Nov 29, 2017 3:09 PM CST | 6                  | 3          | System Administrator (NDADMIN) |
| Systems installation/decommissioning | The installation, testing, implementation or decommissioning and removal of cabling, wiring, equipment, hardware and appropriate software, following plans and instructions and in accordance with agreed s... (Show All)   | Nov 29, 2017 3:09 PM CST | 5                  | 3          | System Administrator (NDADMIN) |
| Systems integration                  | The incremental and logical integration and testing of components and/or subsystems and their interfaces in order to create operational services.   | Nov 29, 2017 3:09 PM CST | 6                  | 4          | System Administrator (NDADMIN) |

Update proficiency level

**Competency Assessments**

| Assessment Name     | Date Signed Off          |
|---------------------|--------------------------|
| 360 Assessment 2017 | Nov 29, 2017 3:09 PM CST |

View assessment

1. Summary of current competency proficiency levels acquired by User
2. Award Competencies
3. Proficiency Level Required by assigned Job Profiles (if applicable)
4. Red progress bars indicating a gap between current proficiency level and the level required for assigned job profiles
5. Update proficiency levels
6. View Competency Assessments
7. View Competency Details

## Awarding Competencies

## To award competencies

1. Click Award Competency
2. Filter by Competency Model
3. Select the Proficiency Level to award
4. Enter expiry date if applicable
5. Save

NetDimensions Talent Suite CDC

Alex Parker  
General Manager  
(Production)  
Pseudo Corp  
ID: alex.parker

EMPLOYEE PROFILE

LEARNING CENTER

CAREER CENTER

SUMMARY

JOB PROFILES

**COMPETENCIES**

TRAINING GAP ANALYSIS

GOALS

PERFORMANCE REVIEW

**Competencies**

Competency Model 2  
Human factors

| Name                            | Description  | Select level                | Expiry Date                 |
|---------------------------------|--|-----------------------------|-----------------------------|
| Systems ergonomics              | The iterative development of the allocation of function (between the human, machine and organisational elements of systems), user interaction and job design. The optimisation of accessibility and usability, based on user requirements, the context of use, relevant ergonomics knowledge and feedback from evaluations of prototypes.      | Select level                |                             |
| Usability requirements analysis | The establishment, clarification and communication of non-functional requirements for usability (for example, screen design/layout/consistency, response times, capacity). The analysis of the characteristics of users and their tasks, and the technical, organisational and physical environment in which products or systems will operate. | Select level                |                             |
| Usability evaluation            | Formal assessment of the usability (including health and safety, and accessibility) of new or existing products or services (including prototypes). Methods include user trials, expert review, survey, and analysis.  | Select level                |                             |
| Human factors integration       | Achievement of optimum levels of product or service usability, by ensuring that project and enterprise activities take account of the user experience.   | Level Code 6 <span>3</span> | Dec 31, 2018 <span>4</span> |

5  
Save  
Cancel

## Updating the Proficiency Level

To update the proficiency level, go to **Career Development Center (CDC) > Career Center > The Competencies** tab. Then click the **Update Proficiency Level** button.

The list of competencies assigned to the learner is displayed. Use the **Level** drop down button to modify the proficiency level of the competency. Then click the **Save** button to kept the changes.

NetDimensions Talent Suite

SANTOS Vina  
UNASSIGNED  
ID: empro005

Employee Profile

Learning Center

Career Center

Summary

Job Profiles

**Competencies**

Training Gap Analysis

Goals

Performance Review

**Competencies**

| Name                | Description   | Date Assigned                   | Level   | Assigned By            |
|---------------------|---|---------------------------------|---------|------------------------|
| Java                |   | Jan 29, 2013 1:30 PM GMT+08:00  | Level 4 | MOLINA Alon (NETDALON) |
| Lathe Operations    |   | Jan 29, 2013 12:05 PM GMT+08:00 | Level 2 | MOLINA Alon (NETDALON) |
| Systems integration | The incremental and logical integration and testing of components and/or subsystems and their interfaces in order to create operational services. | Jan 29, 2013 12:17 PM GMT+08:00 | Level 4 | MOLINA Alon (NETDALON) |

Back Save

A confirmation message is displayed that the competency's proficiency level has been updated.

NetDimensions Talent Suite

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
- Career Center
  - Summary
  - Job Profiles
  - Competencies**
  - Training Gap Analysis
  - Goals
  - Performance Review

### Competencies

1 Proficiency Level is updated

| Name                | Description   | Date Assigned                   | Level   | Assigned By            |
|---------------------|---|---------------------------------|---------|------------------------|
| Java                |   | Jan 29, 2013 1:30 PM GMT+08:00  | Level 4 | MOLINA Alon (NETDALON) |
| Lathe Operations    |   | Jan 29, 2013 12:05 PM GMT+08:00 | Level 2 | MOLINA Alon (NETDALON) |
| Systems integration | The incremental and logical integration and testing of components and/or subsystems and their interfaces in order to create operational services. | Jan 29, 2013 1:41 PM GMT+08:00  | Level 3 | MOLINA Alon (NETDALON) |

[Back](#) [Save](#)

### Viewing the Competency Detail

To view the competency detail, go to On the **Career Development Center > Career Center > Competencies** tab. Click the name of the competency to see:

- Current Proficiency Level
- Competency's properties
- Acquisition Method
- Proficiency Level Scale
- Learning Modules

NetDimensions Talent Suite CDC

Barry Singer  
Production Manager (UK)  
United Kingdom  
ID: barry.singer

EMPLOYEE PROFILE

LEARNING CENTER

CAREER CENTER

SUMMARY

JOB PROFILES

Competencies >

### Managing A Team

**Current Proficiency Level** [Details](#)

Level Title (Code): Advanced (4)  
Description: Employee has applied theory in the area  
Acquisition Summary: Acquired through training on Dec 1, 2017  
Expiry: ✔ Valid Until: Nov 30, 2019  
Last Updated: System Administrator (NDADMIN) on Dec 1, 2017

**Competency Details**

Name: Managing A Team  
Model: Management  
Reference Code: M2  
Source Library: (not specified)  
Description: (not specified)  
Active: Yes

**Acquisition Method**

Training: Yes  
Assessment: No  
Ad Hoc Self-Assessment: No  
Ad Hoc Reviewer Assessment: Yes  
Ad Hoc Assessment Expiration: Does not expire  
Minimum Waiting Period for Re-Ad-Hoc Assessment: 0 Day(s)

**Proficiency Levels**

| Level Code | Level Title           | Description                                    |
|------------|-----------------------|--|
| 1          | Fundamental Awareness | Employee has a basic knowledge in the area     |
| 2          | Novice                | Employee has limited experience in the area    |
| 3          | Intermediate          | Employee has practical application in the area |
| 4          | Advanced              | Employee has applied theory in the area        |
| 5          | Expert                | Employee has recognized authority in the area  |

**Learning Modules**

This competency will be awarded when 2 of the learning modules below is completed. If it exceeds the number of assigned learning modules, then competency will be awarded when all modules are completed.

| Module Title   | Mandatory |
|--|-----------|
| <a href="#">Appraisals and Reviews</a><br>Multi-Language | Required  |
| <a href="#">Motivating Your Team</a><br>Multi-Language   | Required  |

[Back](#)

### Current Proficiency Level Details

If the Current Proficiency Level has been acquired through training, clicking the Details link provides access to

1. A summary of the competency modules including a status
2. Link to Module Catalog Page
3. With appropriate access controls, modify the expiry date against a given module completion
4. Acquisition summary and last updated information

**NetDimensions Talent Suite** CDC

Competencies >

### Managing A Team

**Current Proficiency Level** [Details]

Level Title (Code): Intermediate (3)  
 Description: Employee has practical application in the area  
 Acquisition Summary: Acquired through training on Dec 1, 2017  
 Expiry: ⚠ Valid Until: Dec 1, 2019  
 Last Updated: System Administrator (NDADMIN) on Dec 1, 2017

**Current Proficiency Level Details**

| Module Title           | Level Title (Code) | Mandatory | Status     | Expiry      |
|------------------------|--------------------|-----------|------------|-------------|
| Appraisals and Reviews | Intermediate (3)   | No        | Completed  | Dec 1, 2019 |
| Motivating Your Team   | Advanced (4)       | No        | Incomplete |             |

Acquisition Summary: Acquired through training on Dec 1, 2017  
 Last Updated: System Administrator (NDADMIN) on Dec 1, 2017

Save Cancel

Ad Hoc Assessment Expiration: Does not expire  
 Minimum Waiting Period for Re-Ad-Hoc Assessment: 0 Day(s)

**Proficiency Levels**

| Level Code | Level Title           | Description                                    |
|------------|-----------------------|--|
| 1          | Fundamental Awareness | Employee has a basic knowledge in the area     |
| 2          | Novice                | Employee has limited experience in the area    |
| 3          | Intermediate          | Employee has practical application in the area |
| 4          | Advanced              | Employee has applied theory in the area        |

If the Current Proficiency Level has been acquired through ad-hoc assessment, clicking the Details link provides access to

1. Re-assessment functionality if applicable
2. With appropriate role access controls, modify expiry date of assessment
3. Acquisition summary and last updated information

**NetDimensions Talent Suite** CDC

Barry Singer  
Production Manager (UK)  
United Kingdom  
ID: barry.singer

COMPETENCIES

**Managing A Team**

Current Proficiency Level [Details]

Level Title (Code): Expert (5)  
Description: Employee has recognized authority in the area  
Acquisition Summary: Acquired through ad-hoc assessment on Dec 1, 2017 by Alex Parker (ALEX.PARKER)

**Current Proficiency Level Details**

| Level Title (Code)         | Description                                    |
|----------------------------|--|
| Does Not Meet Any Criteria |  |
| Fundamental Awareness (1)  | Employee has a basic knowledge in the area     |
| Novice (2)                 | Employee has limited experience in the area    |
| Intermediate (3)           | Employee has practical application in the area |
| Advanced (4)               | Employee has applied theory in the area        |
| Expert (5)                 | Employee has recognized authority in the area  |

Expiry: Dec 31, 2018

Acquisition Summary: Acquired through ad-hoc assessment on Dec 1, 2017 by Alex Parker (ALEX.PARKER)

Last Updated: Alex Parker (ALEX.PARKER) on Dec 1, 2017

Save Cancel

**Proficiency Levels**

| Level Code | Level Title           | Description                                    |
|------------|-----------------------|--|
| 1          | Fundamental Awareness | Employee has a basic knowledge in the area     |
| 2          | Novice                | Employee has limited experience in the area    |
| 3          | Intermediate          | Employee has practical application in the area |
| 4          | Advanced              | Employee has applied theory in the area        |

## Training Gap Analysis

The Training Gap Analysis in the Career Development Center, determines the required training assignments associated with the user's current job profiles(s) or other profiles the user is permitted to review, and list those courses not yet found in their training history. Courses in which the user are currently enrolled in or have previously completed are excluded from this list, so in essence it shows the "gap" between total training requirements and currently achieved training. It in no way implies a deficiency, but instead identifies courses that the user should have in their plan.

### Viewing the Training Gap Analysis

Go to the **Career Development Center > Career Center > Training Gap Analysis** tab. The list appearing on the screen shows the courses that are required as a part of the selected job profile(s), but which are not yet a part of the training record. To select a job profile, use the drop-down list, then click the **Click here for more information of this profile** hyperlink to display the Job Profiles details.

From here users can:

- Assign a program by clicking the hyperlink next to the Job Profile Reference Code field.
- De-Assign a Job Profile by clicking the De-Assign Job Profile button.

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
- Career Center
  - Summary
  - Job Profiles
  - Competencies
  - Training Gap Analysis**
  - Goals
  - Performance Review

### Training Gap Analysis

those required as a part of the selected job profile(s), but which are not yet a part of your training record (e.g. are not currently enrolled or previously completed).

Filter Gap Courses by Job Profile  
Fire Safety Officer

| Title      | Action |
|------------|--------|
| Program P1 | ---    |

[Click here for more information on this profile...](#)

## Goals

The **Goal** section of the **Career Development Center** allows the manager to view the goals (both performance and organizational) associated with the learner. This feature allows them to do the following:

- View the learner's goal (performance and organizational)
- Delete Performance Goals in Bulk
- View Performance Goals Hierarchy
- Edit Performance Goals Details

### Note:

The Organizational Goals Hierarchy and Organizational Goals editor can only be accessed by the owner.

### Viewing the Learner's Performance and Organizational Goals

To view learner's Performance or Organizational goals, go to the **Career Development Center > Career Center > Goals** tab. This opens learner's **Performance Goals**.

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

- Employee Profile
- Learning Center
- Career Center
  - Summary
  - Job Profiles
  - Competencies
  - Training Gap Analysis
  - Goals**
  - Performance Review

### Goals

Performance Goals | **Organizational Goals**

Bulk Action

|  | Title                | Target Date  | Status  | Progress | Category | Weight |
|--|----------------------|--------------|---------|----------|----------|--------|
|  | Improve Sales Plan 1 | Jan 31, 2013 | Pending | 0%       | ----     | 100%   |

To display the learner's organizational goal, click the **Organizational Goals** tab.

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

**Goals**

Performance Goals | Organizational Goals

|   | Title                                | Goal Program                        | Category | Status  |
|---|--------------------------------------|-------------------------------------|----------|---------|
| ⚙ | Improve Features and Functionalities | Improve Performance Review Features | ----     | Pending |
| ⚙ | Increase Sales                       | Increase Sales by 10%               | ----     | Pending |

### Viewing Performance Goal Hierarchy

To view the learner's Performance Goal Hierarchy. Go to **Career Development Center > Career Center > Goals > Performance Goals**.

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

**Goals**

Performance Goals | Organizational Goals

Bulk Action ▾

|   | Title                | Target Date  | Status  | Progress | Category | Weight |
|---|----------------------|--------------|---------|----------|----------|--------|
| ⚙ | Improve Sales Plan 1 | Jan 31, 2013 | Pending | 0%       | ----     | 100%   |

Click the **Tools** icon and select **Goal Hierarchy**.

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

**Goals**

Performance Goals | Organizational Goals

Bulk Action ▾

|   | Title                | Target Date  | Status  | Progress | Category | Weight |
|---|----------------------|--------------|---------|----------|----------|--------|
| ⚙ | Improve Sales Plan 1 | Jan 31, 2013 | Pending | 0%       | ----     | 100%   |

Goal Hierarchy

The screen displays the goal hierarchy



NetDimensions Talent Suite



**SANTOS Vina**  
UNASSIGNED  
ID: empno005

Employee Profile

Learning Center

Career Center

Summary

Job Profiles

Competencies

Training Gap Analysis

**Goals**

Performance Review

## Goals

Increase Sales

Improve Sales Plan 1

Increase Sales

Organizational Goal  
Category: Sales  
Owner: SANTOS Vina

[Switch to Detailed View](#)

Back

## Performance Goals

(Available for Performance only)

### Creating and Linking Performance Goals

On the **Workspace** menu, select **Review**. Click the **Tools** icon of the appraisee to whom the goal will be assigned, then select **Assign Goal**:

1. From here enter the performance goals details:

- Title
- Weight
- Description
- Start Date / Target Date
- Measurement & Milestone
- Date Close

**New Performance Goal**

**DETAILS**

Title\*  
Required

Weight\*  
Required %

Description (Maximum 2000 characters)

Start Date\*  
Date

Target Date\*  
Date

Measurement and Milestones

Date Closed  
Date

**LINKED ORGANIZATIONAL GOAL**

Link Goal Unlink Goal

**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

Save Cancel

During the creation of the new performance goal, you have an option to link the goal to an

organizational goal:

The screenshot shows a form with a 'Date Closed' section at the top, containing a 'Date' input field and a calendar icon. Below this is a section titled 'LINKED ORGANIZATIONAL GOAL' which is highlighted with a red rectangle. This section contains two buttons: 'Link Goal' (with a plus icon) and 'Unlink Goal' (with a minus icon). Below the 'LINKED ORGANIZATIONAL GOAL' section is a 'NOTIFICATION SETTINGS' section. Under 'Completion Reminders', there are two rows of settings. The first row has a checkbox for 'Send completion reminder', a dropdown set to 'Once', and a text field 'to Owner' followed by a dropdown and 'day(s) before Target Date'. The second row has a checkbox for 'Send completion reminder', a dropdown set to 'Once', and a text field 'to Owner's Direct Appraiser' followed by a dropdown and 'day(s) before Target Date'. At the bottom of the form are 'Save' and 'Cancel' buttons.

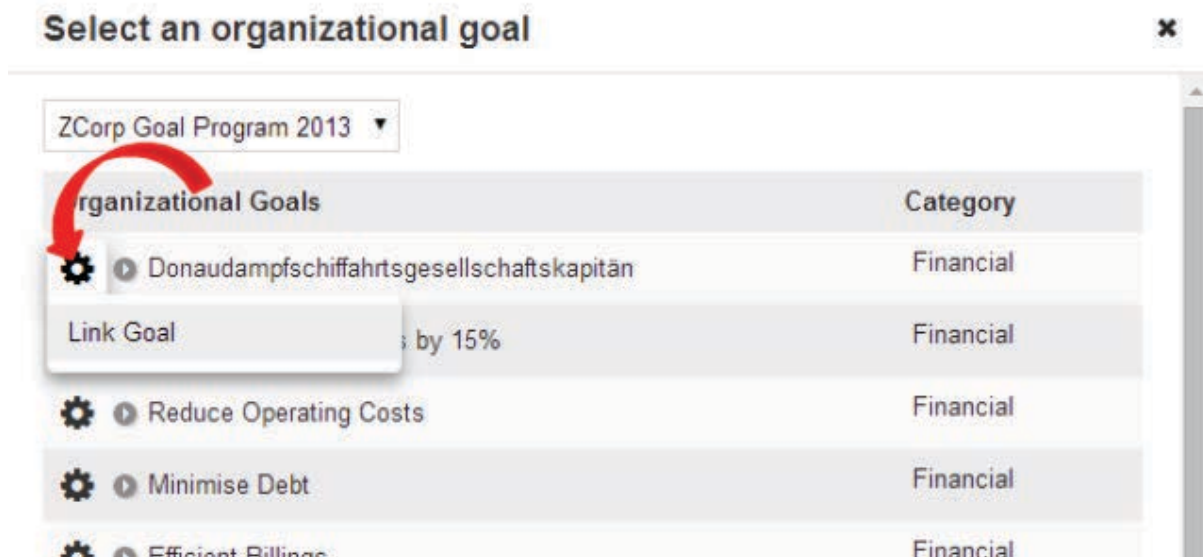
Click the **Link Goal** button. The **Select Organizational Goal** screen appears.

To do this, proceed to the next step, otherwise if you decided not to link the your performance goal, proceed to step 7 to save the new performance goal.

Select the goal program where the organizational goal you want to link to your performance goal is associated. The list of organizational goal is displayed.

The screenshot shows a dialog box titled 'Select an organizational goal' with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu labeled 'Select a goal program'. The dropdown is open, showing a list of options: 'Select a goal program' (highlighted), 'ZCorp Goal Program 2013', 'Goals 2013', 'Customer Service', 'ZCorp Goal Program 2012', '公司目标2012', 'Mechanix Goals', and 'ZCorp Goal Program 2011'.

Click the **Gear** icon and then select **Link Goal** of the organizational goal you want to link:



**Select an organizational goal**

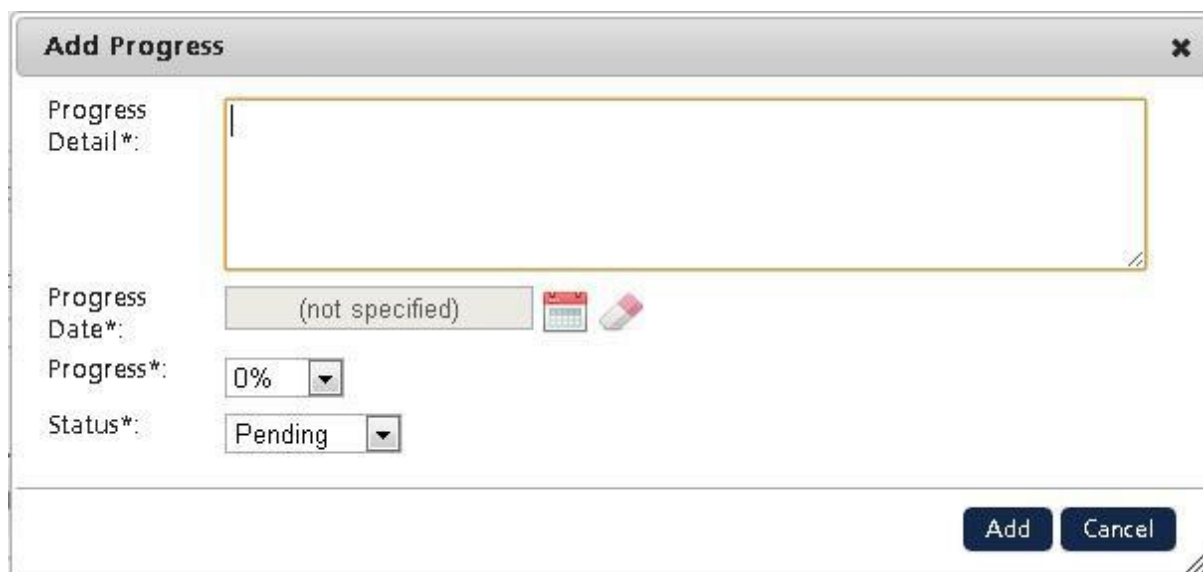
ZCorp Goal Program 2013 ▼

| Organizational Goals                           | Category  |
|--|-----------|
| ⚙️ ⌕ Donaudampfschiffahrtsgesellschaftskapitän | Financial |
| Link Goal by 15%                               | Financial |
| ⚙️ ⌕ Reduce Operating Costs                    | Financial |
| ⚙️ ⌕ Minimise Debt                             | Financial |
| ⚙️ ⌕ Efficient Billings                        | Financial |

Click the **Save** button.



### Updating Goals

When editing a goal, click on "Add" under the "Progress" section:



**Add Progress**

Progress Detail\*:

Progress Date\*: (not specified)  

Progress\*: 0% ▼

Status\*: Pending ▼

Add Cancel

The dialogue requires the user to enter the following parameters:

- Progress Detail
- Progress Date
- Progress
- Status

Once completed, click the **Add** button. The screen returns to Performance Goal details screen with the new progress added under the progress section.

Note: To remove a progress update, click the Remove button located at the last column of the progress you want to remove.

### Unlinking Goals

To unlink a goal from an Organizational Goal, open the goal for editing. Click the **Unlink Goal** button.

The performance goal will be unlinked to the organizational goal:

The screenshot shows a web interface for managing goals. At the top, there is a 'Date Closed' field with a calendar icon. Below this is a section titled 'LINKED ORGANIZATIONAL GOAL' which contains two buttons: 'Link Goal' (with a plus icon) and 'Unlink Goal' (with a minus icon). This section is highlighted with a red rectangular box. Below the linked goal section is a 'NOTIFICATION SETTINGS' section. It includes a sub-section 'Completion Reminders' with two rows of settings. Each row has a checkbox for 'Send completion reminder', a dropdown menu set to 'Once', and a text field for 'to Owner' followed by 'day(s) before Target Date'. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

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

### Deleting Goals

You can delete goals individually while editing a goal or in bulk under the Performance Goals tab

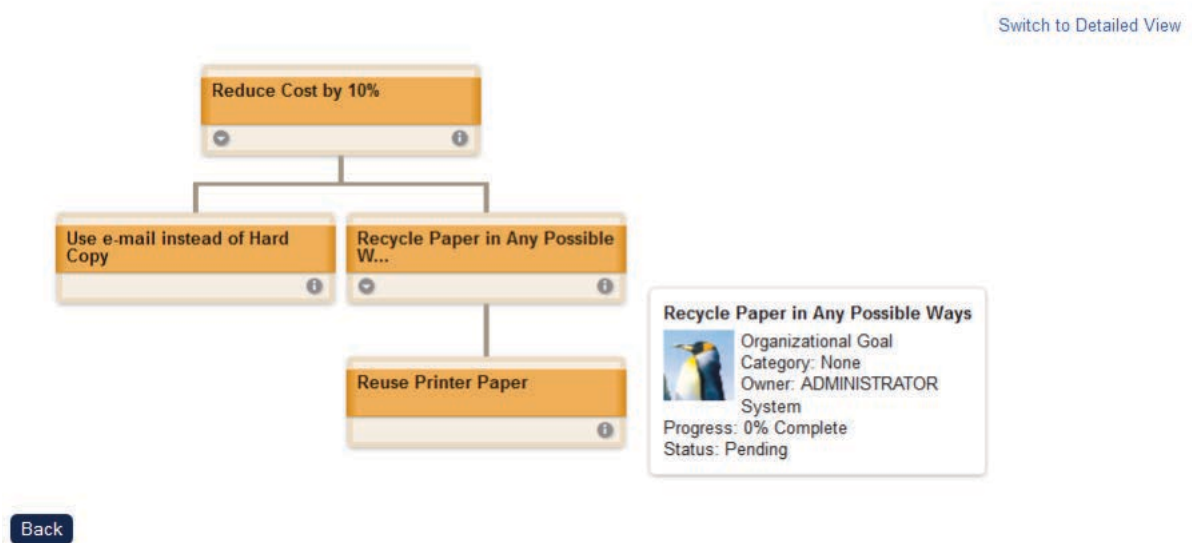
**Note:** There are rules in deleting performance goals:

- Employees/Learners can only delete goals that they created by themselves.
- Managers can delete all goals assigned to subordinates except those that have been created by their subordinates.
- Administrators are only able to delete goals that they have created by themselves.

### Viewing the Organization Goal Hierarchy Graph

This functionality allows the user to get a better view on how the goals align to the organization's goals. The chart depicts the goal hierarchy of the organizational goal from the root-level. To view the Organizational Goal Hierarchy Graph: From the *My Goals* screen, click the **Tools** button of the performance goal you want to view and then select **Goal Hierarchy**:

## View Hierarchy



You can switch between two views:

- **Detailed View** shows the title, category, owner, progress and status of goals.
- **Summarized View** shows only the title, which allows users to view highly cascaded goal hierarchy structure easily. User can preview the Detailed View of a goal by mouse over the "info icon".

The Goal's title would be truncated if its too long. Mouse over the goal to show the full name.

