PeopleFluent

Recruit, Develop, Perform, Reward

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

www.peoplefluent.com/products/learning

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Introduction

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

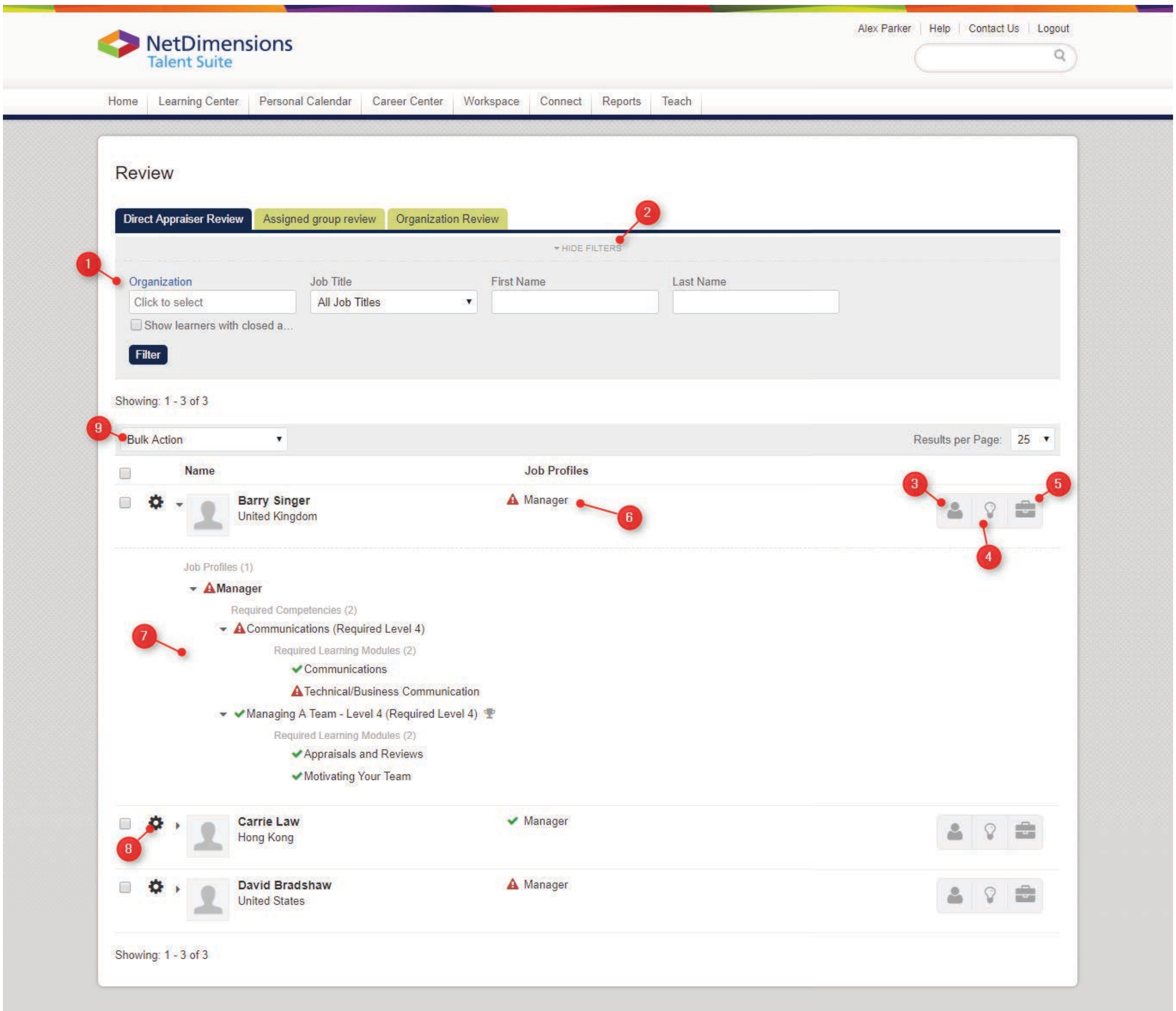
(Available for Performance, Learning, and eLearning only)

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



Actions for Individuals

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

1. Review Employee Profile
2. Reviewing 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

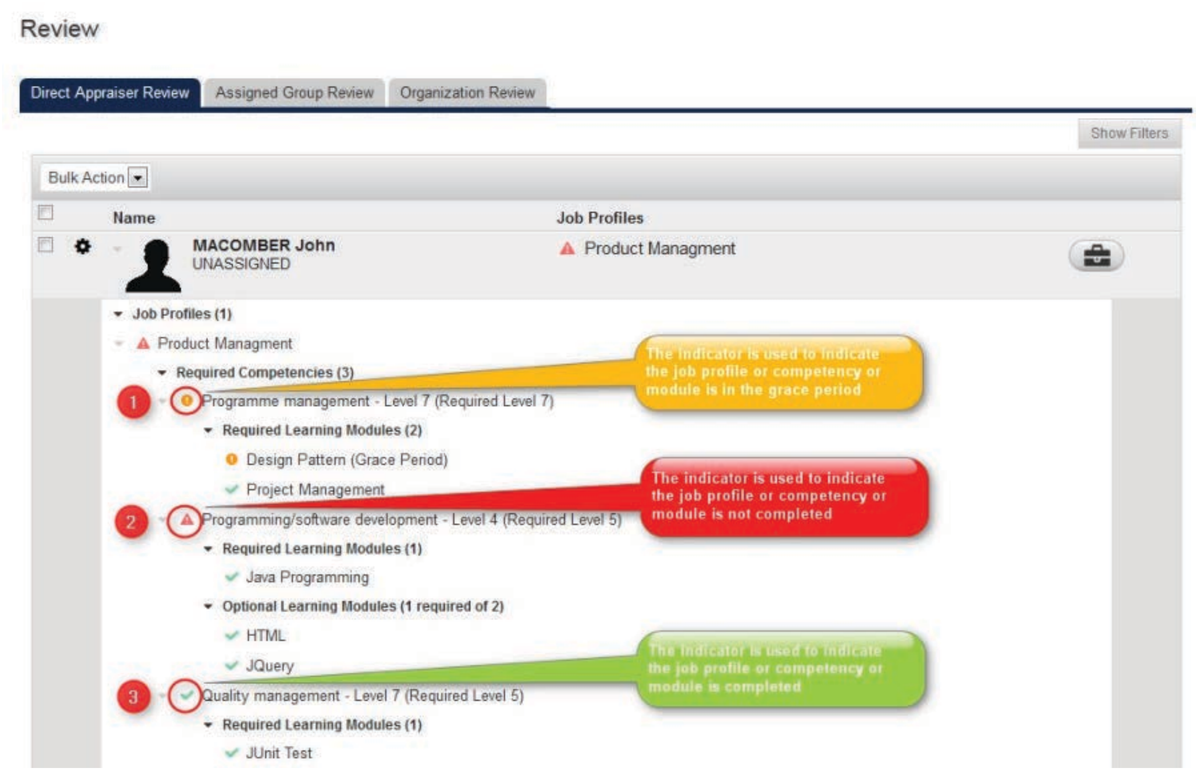
Bulk Actions

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:



✓ *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:

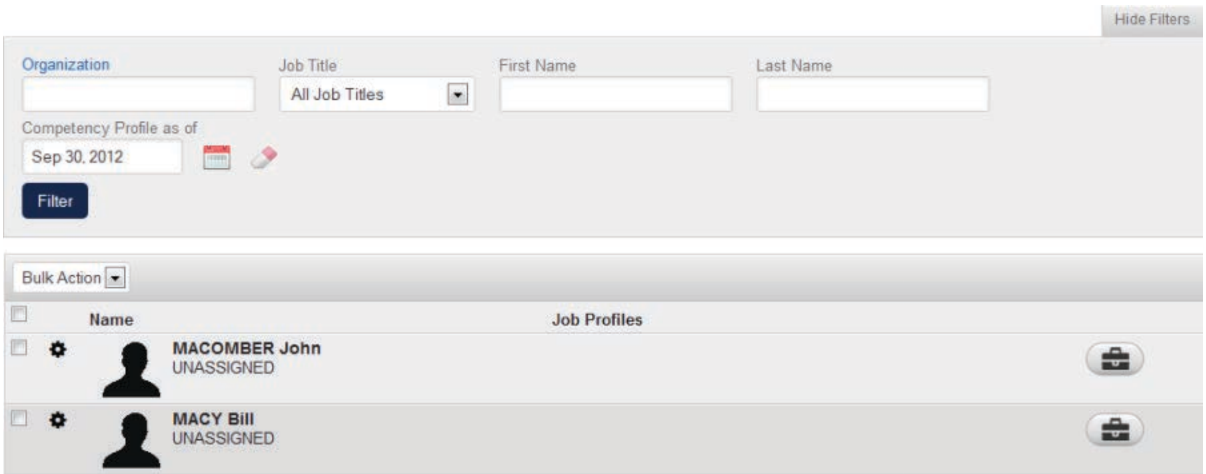
- Learning module: if the new released revision of the learning module is not completed, the learning module will be indicated as in the grace period.
- Competency: if all the required modules are completed but one of the required modules has a new revision released, the competency will be indicated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

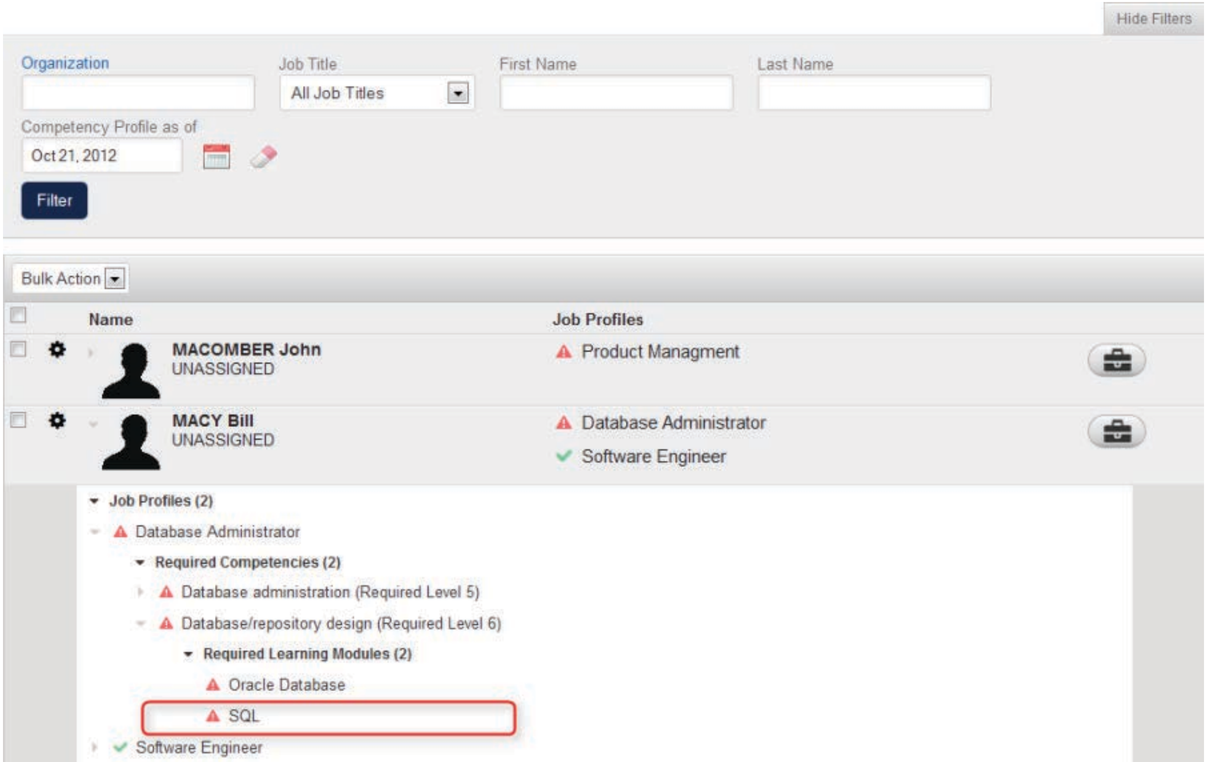
If you want to view the competency profiles as of a specific date, you can use the date selector in "Filters" section. For example, take the following scenario:

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

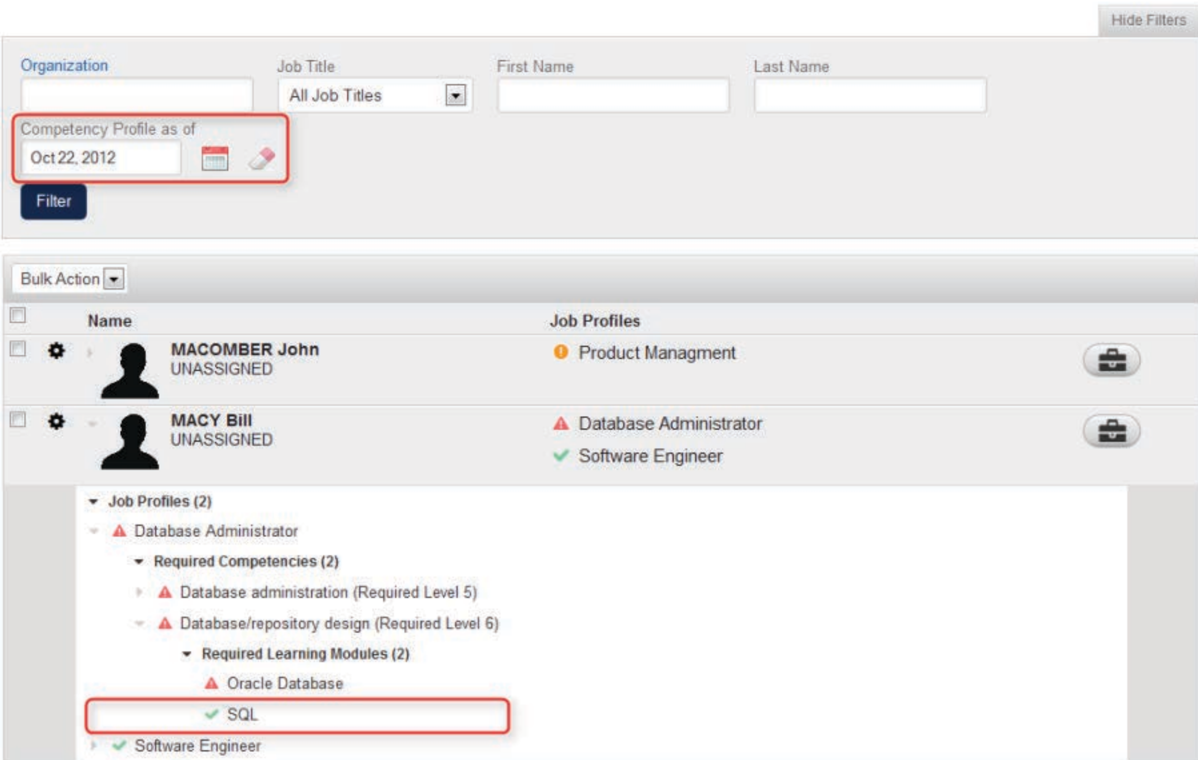
Competency Profile as of September 30, 2012 will list Bill Macy with no job profiles because they are not assigned until Oct 1, 2012:



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



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



Enrollment Requests History

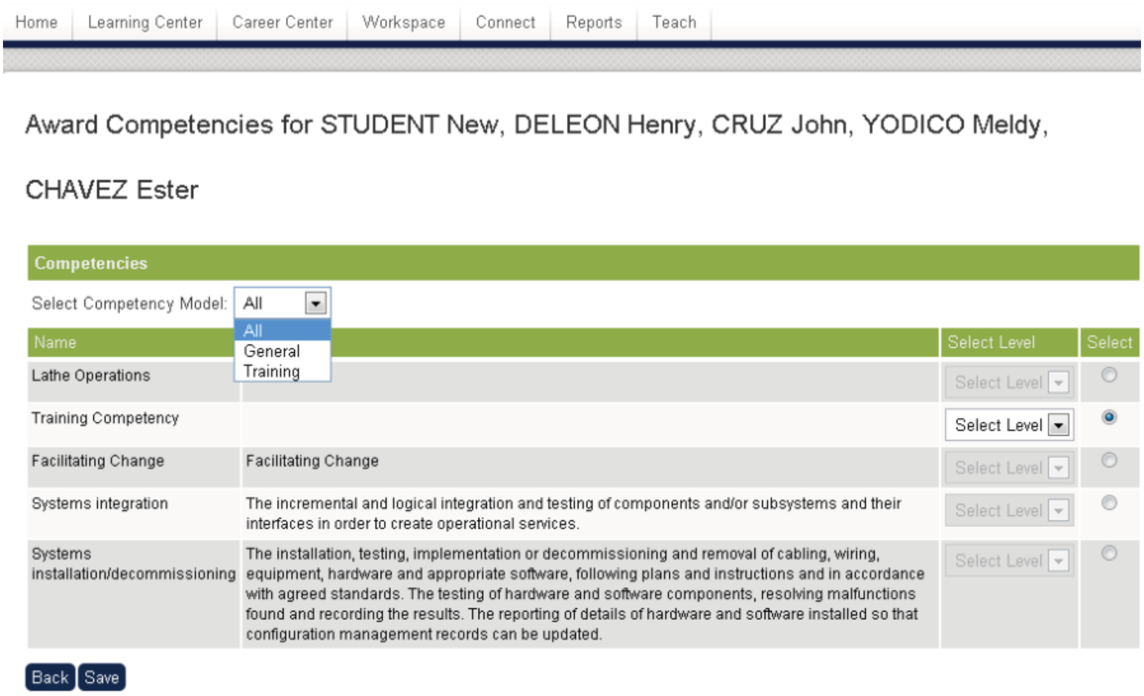
Enrollment requests can be displayed for selected users. These can be filtered by Overall Status:

Assigning Competency

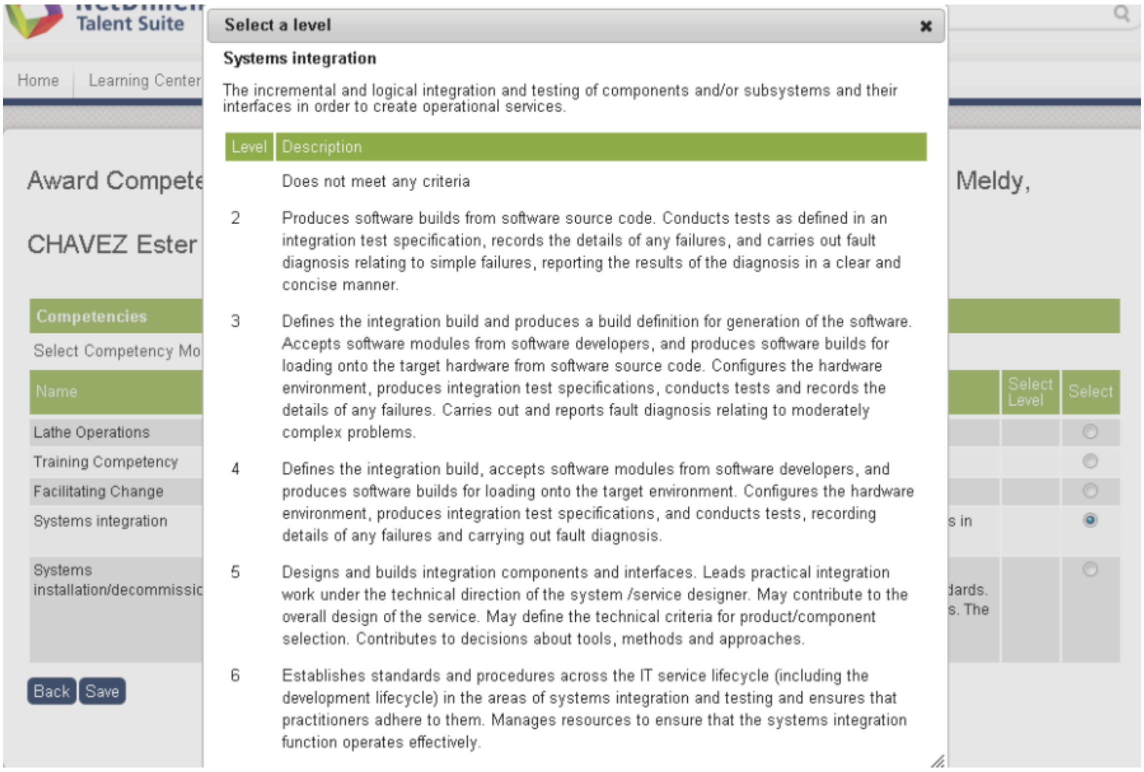
(Available for Performance and Learning only)

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

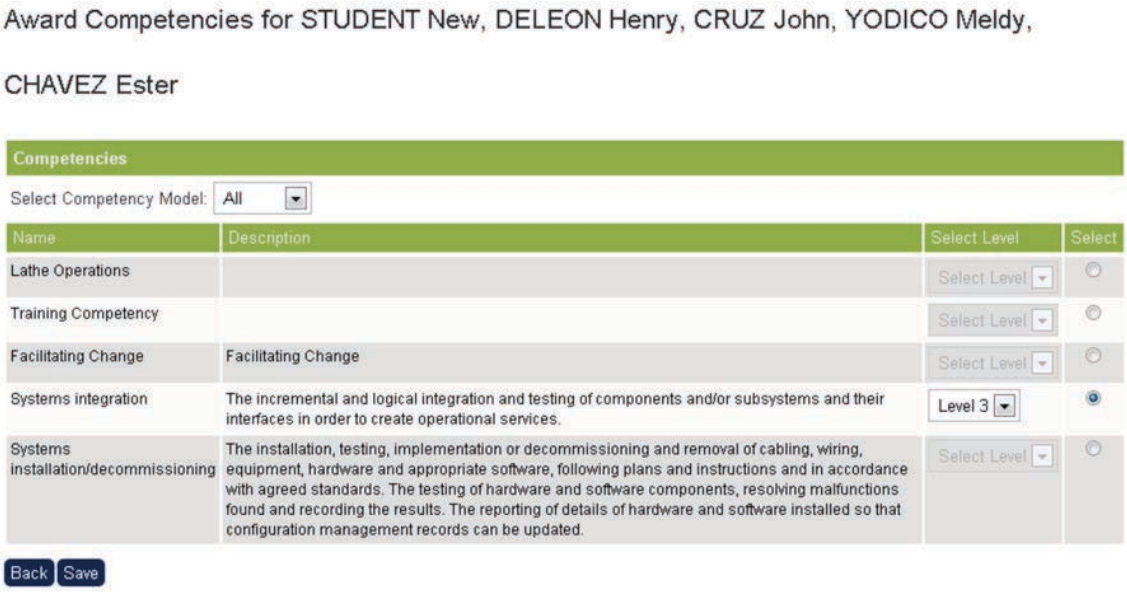
1. At Workspace > Review, click Assign Competency under the individual cog or select individuals and use the Bulk Action



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



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



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*.

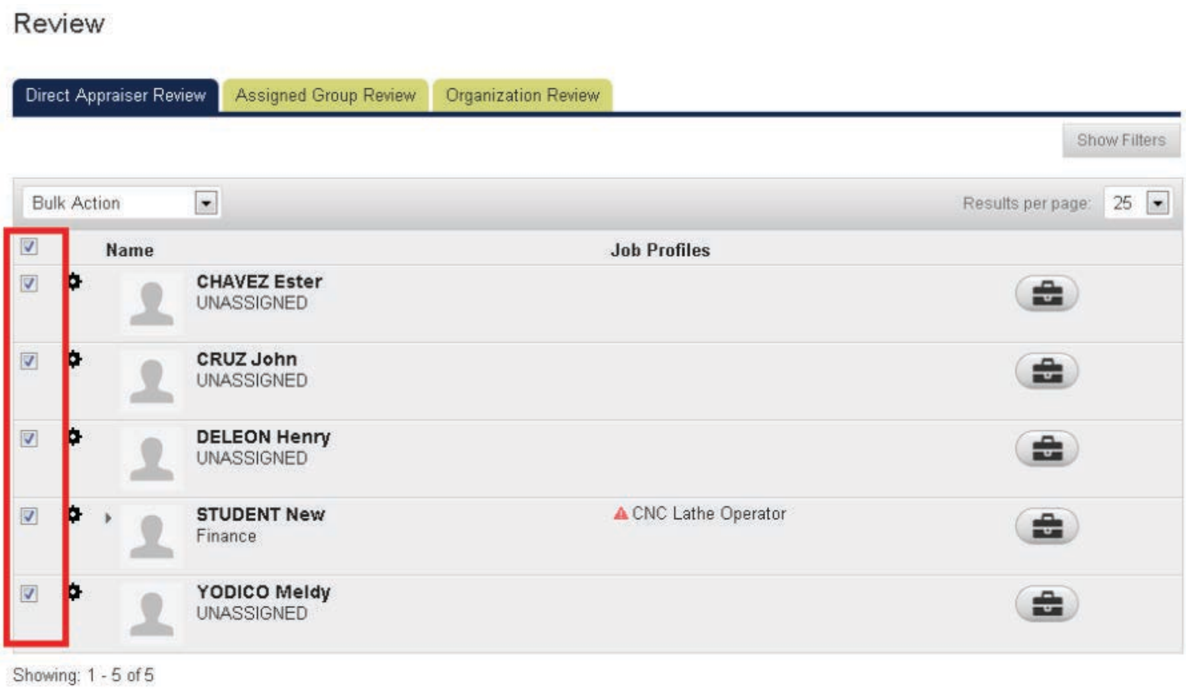
As different rating scales may possibly be used in different appraisals/sections, the overall performance and potential scores would be normalized using the formula below:

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

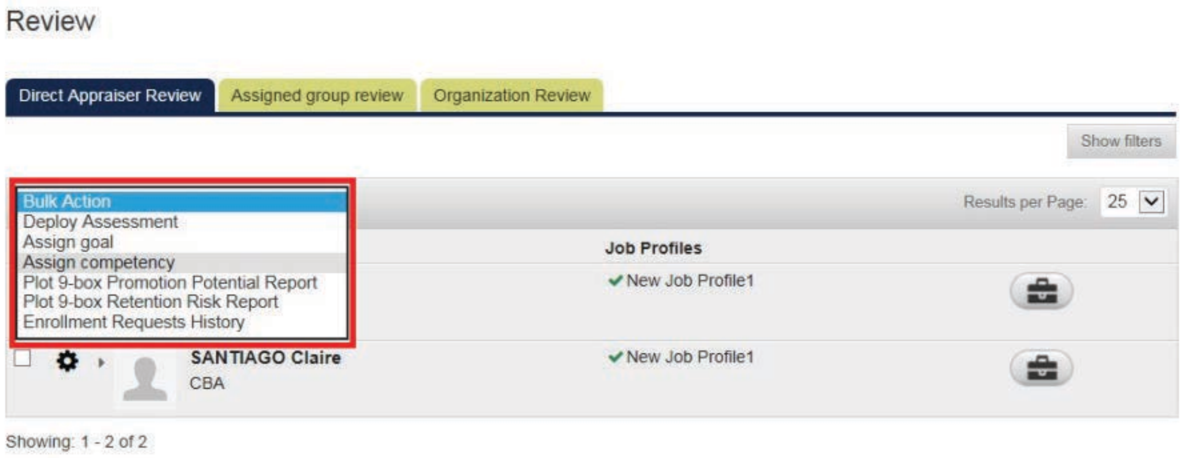
To deploy 9-box reports, users must have "Allow 9-Box Report Deployment" Role Access Control set to "Yes".

Plot 9-Box Promotion Potential Report

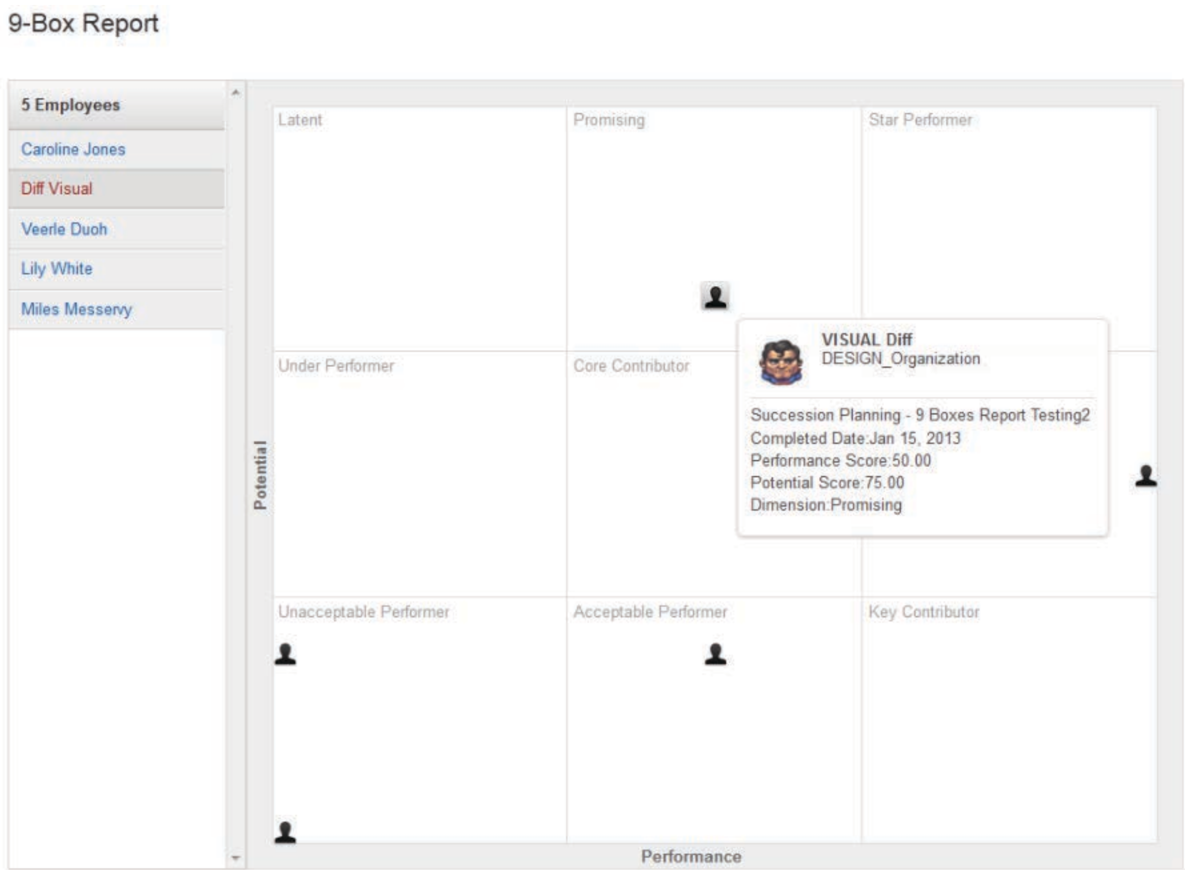
On the Review screen (regardless whether Direct Appraiser Review, Assign Group Review, or Organization Review screen), tick the box of the participants to whom the competency will be assigned.



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



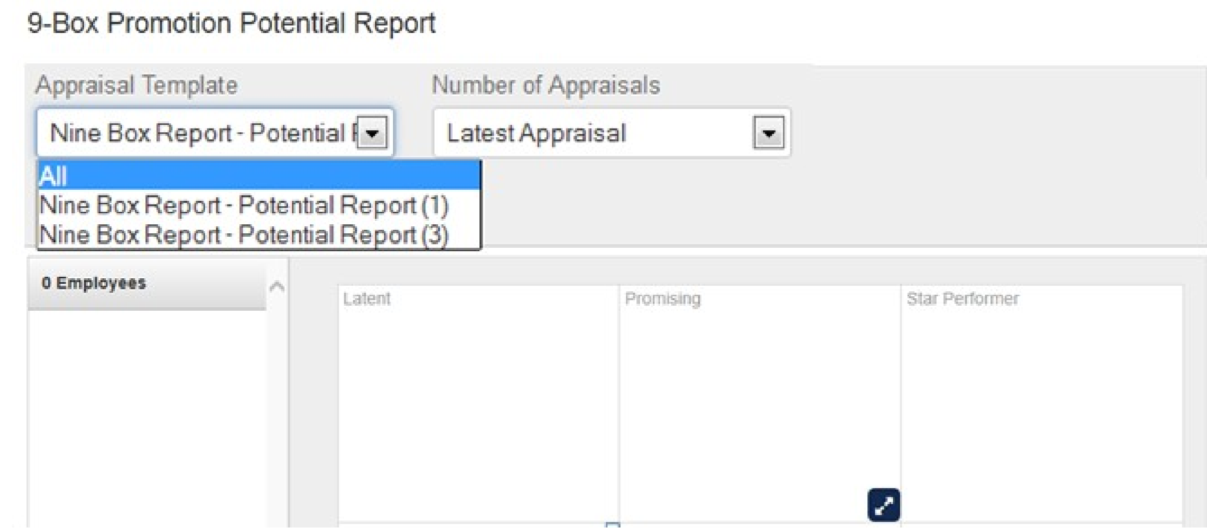
This opens the *9-Box Promotion Potential Report* screen.



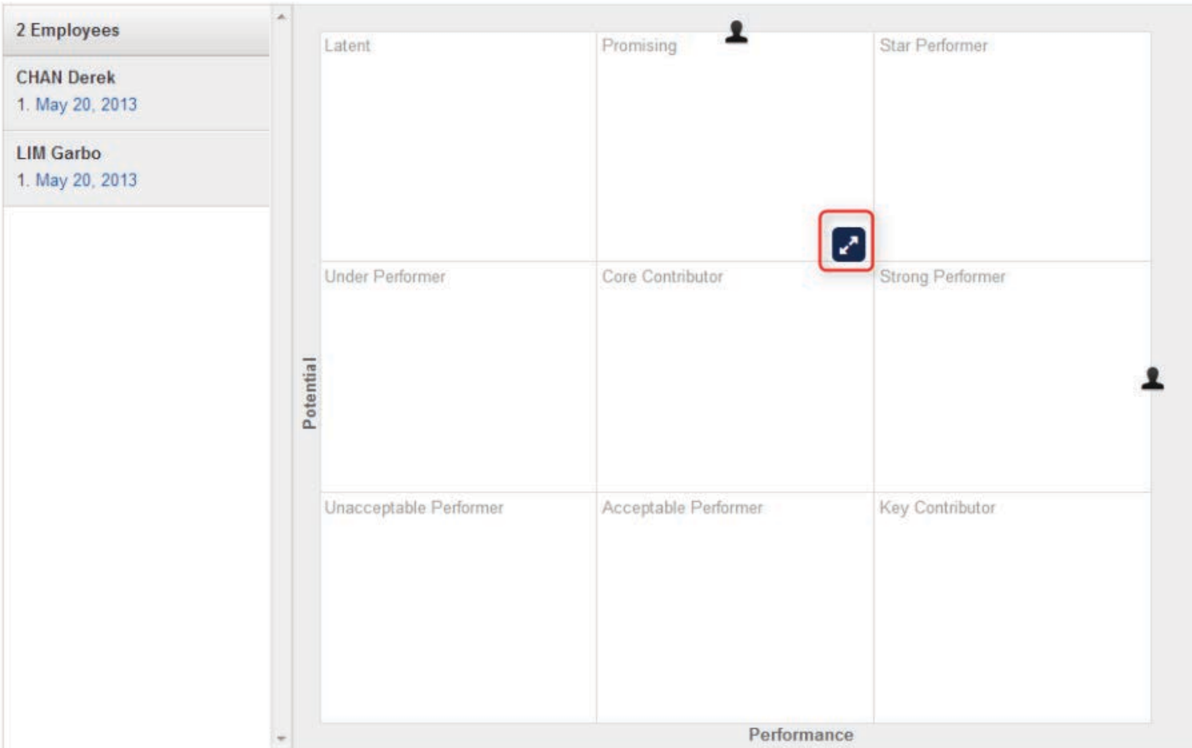
The *9-Box Report* consists of two parts. The left part lists the selected employees. Highlighting an employee will show the detailed information of the employee on the right part. Detailed information includes employee's basic information, appraisal template title and appraisal completion date with 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*.

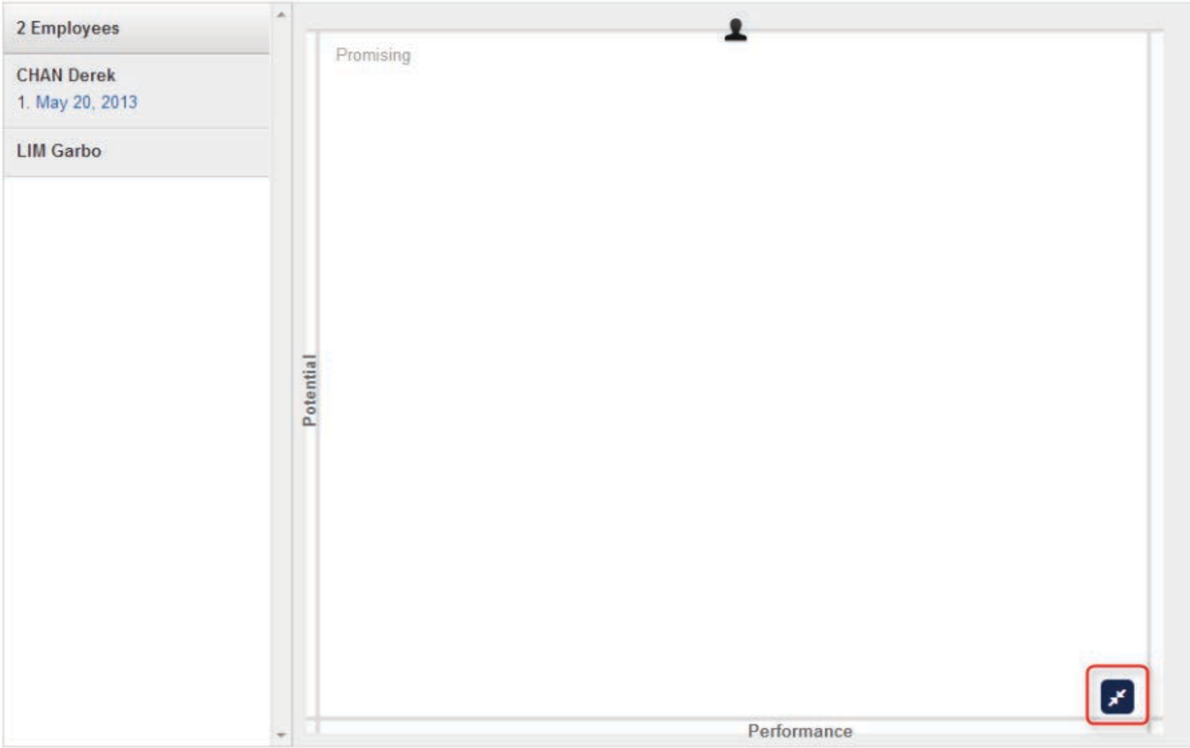
Optionally filter the results using the following criteria:

- *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



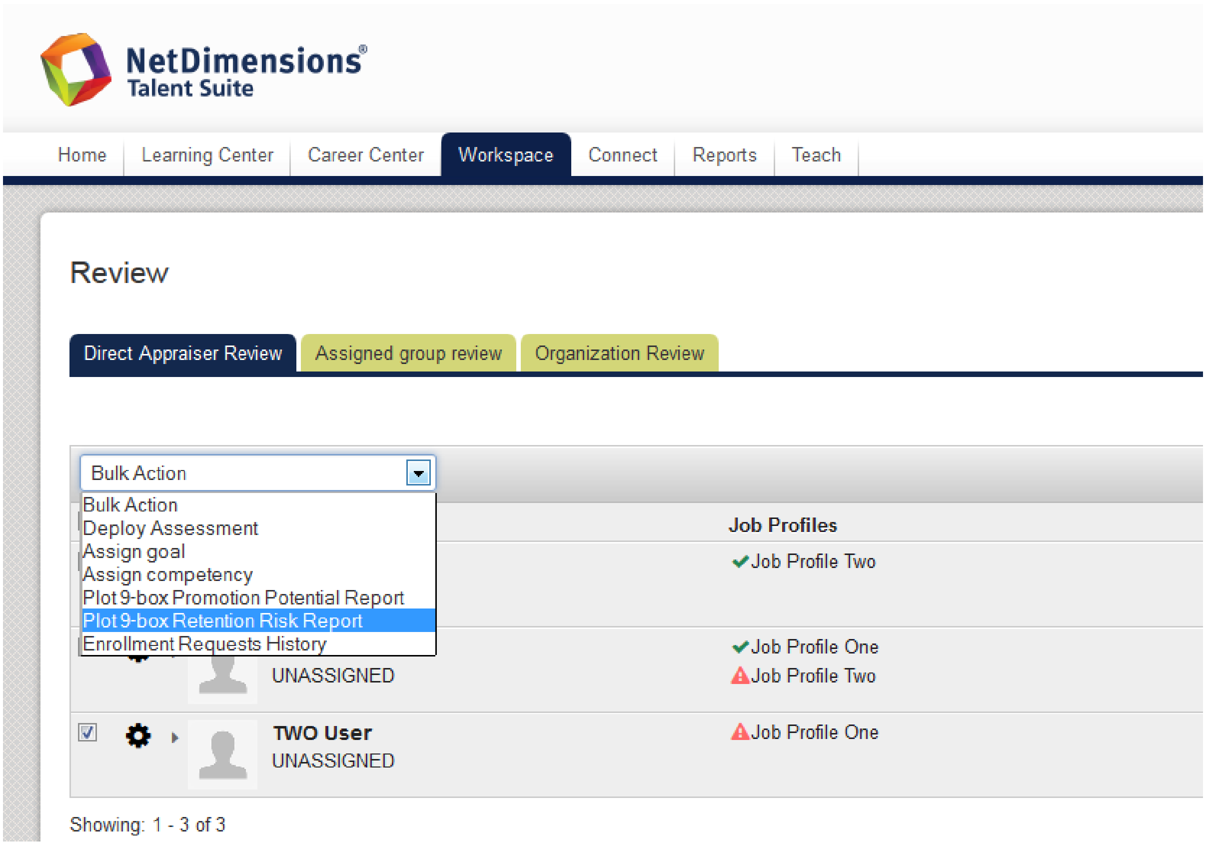
To zoom in the 9-box Reports, click the zoom in button.





Plot 9-box Retention Risk Report to Review Bulk Action

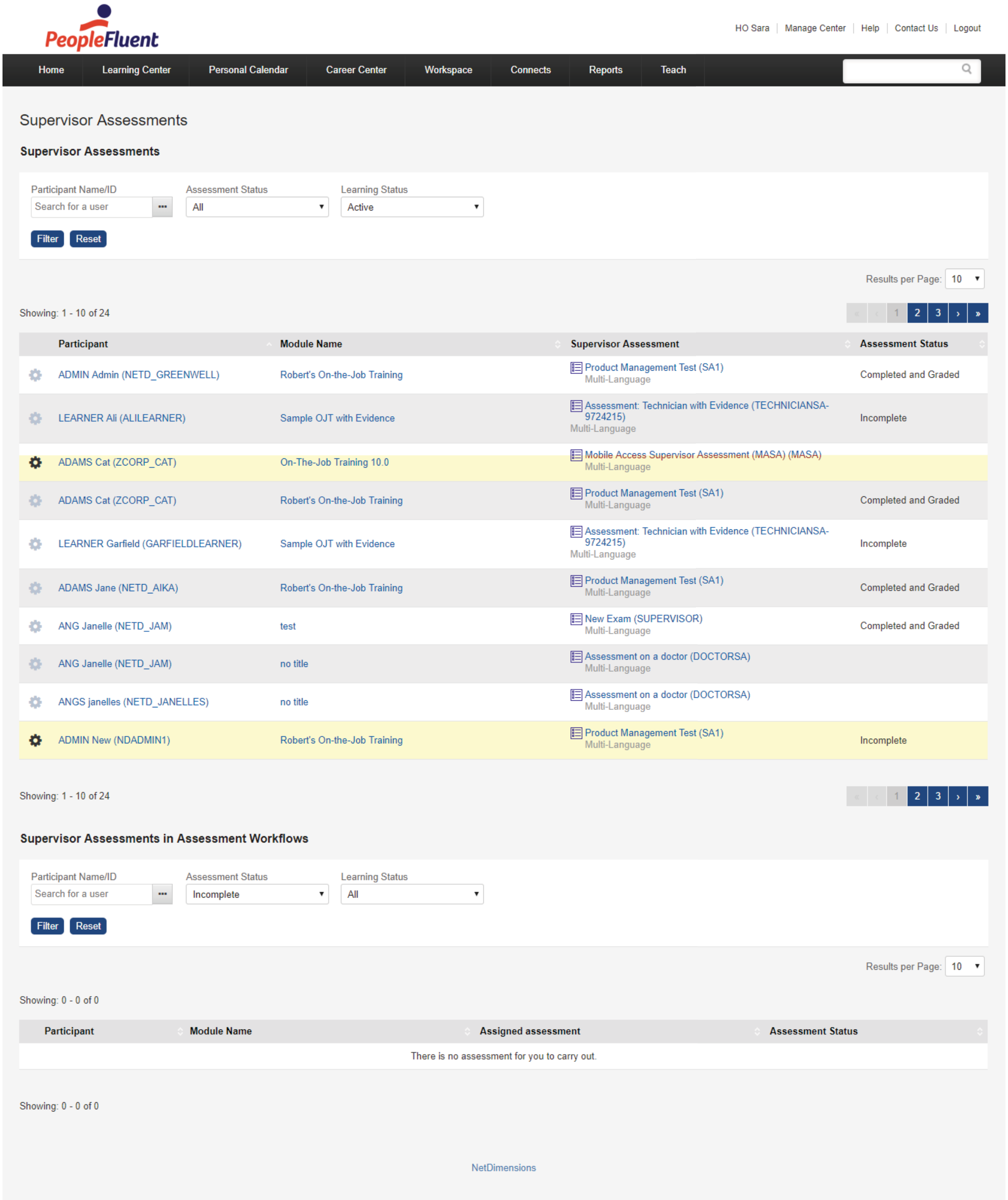
In order to allow reviewers to compare retention risk scores collated through the appraisal succession plan sections for a given set of users, use the bulk action *"Plot 9-box Retention Risk Report"*. Similar to the 9-box Promotion Potential Report, Reviewers can now select a set of users and then generate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



Supervisor Assessments

(Available for Performance and Learning only)

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

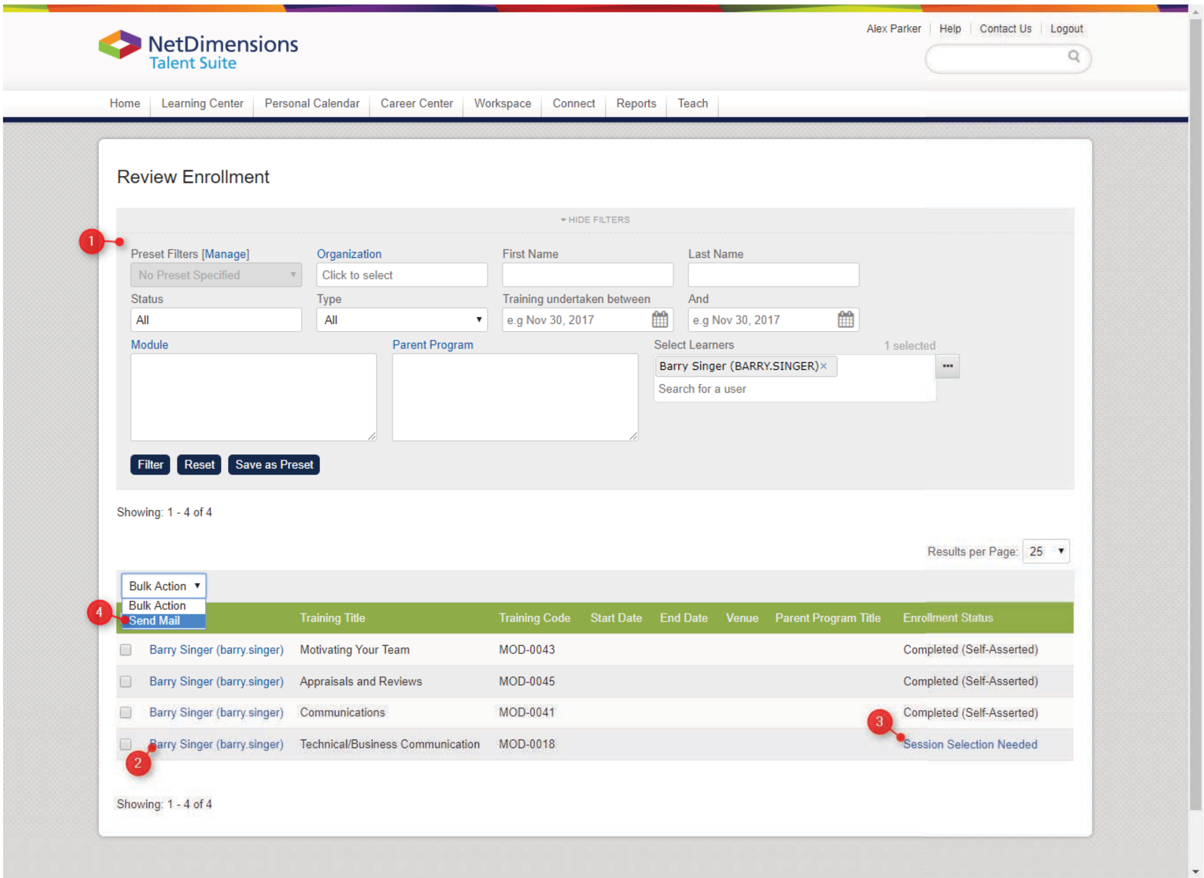


You can launch an assessment by clicking on the Supervisor Assessment title.

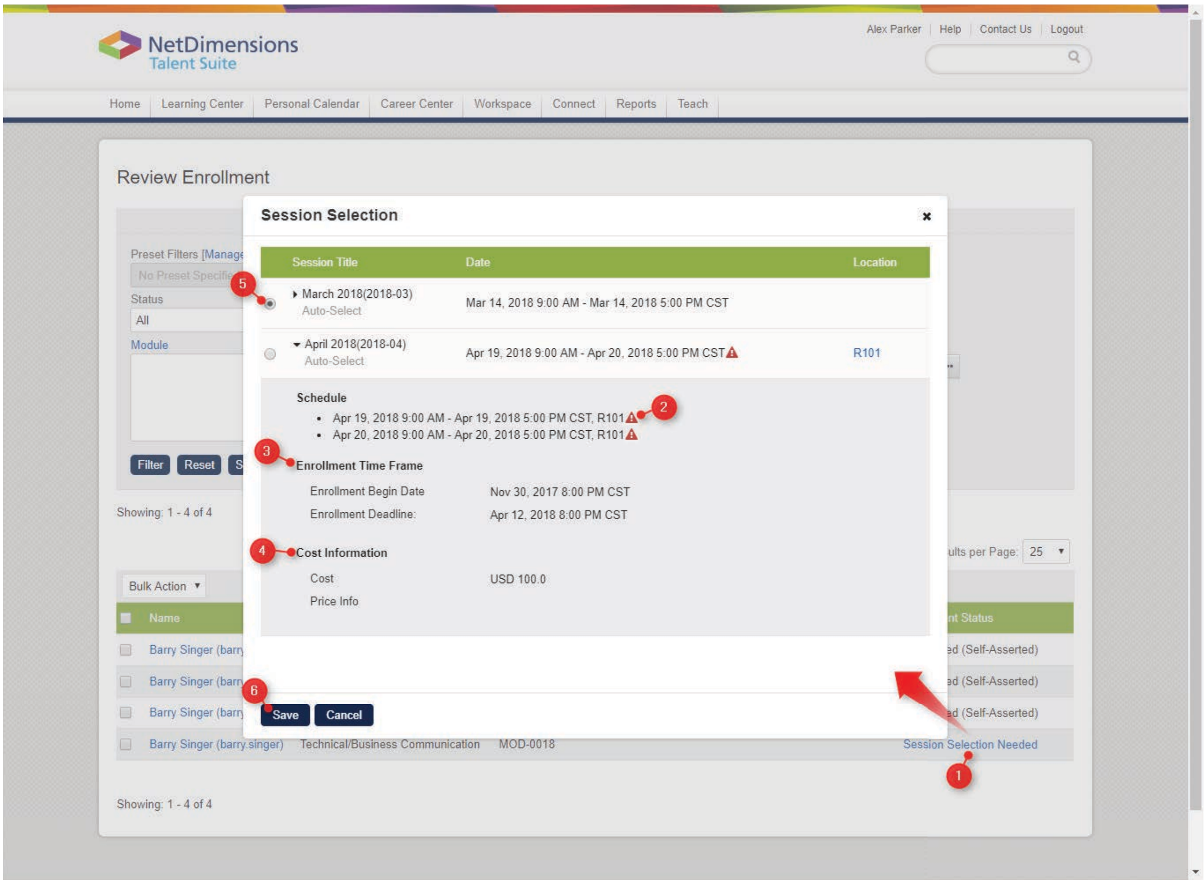
Review Enrollments

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



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

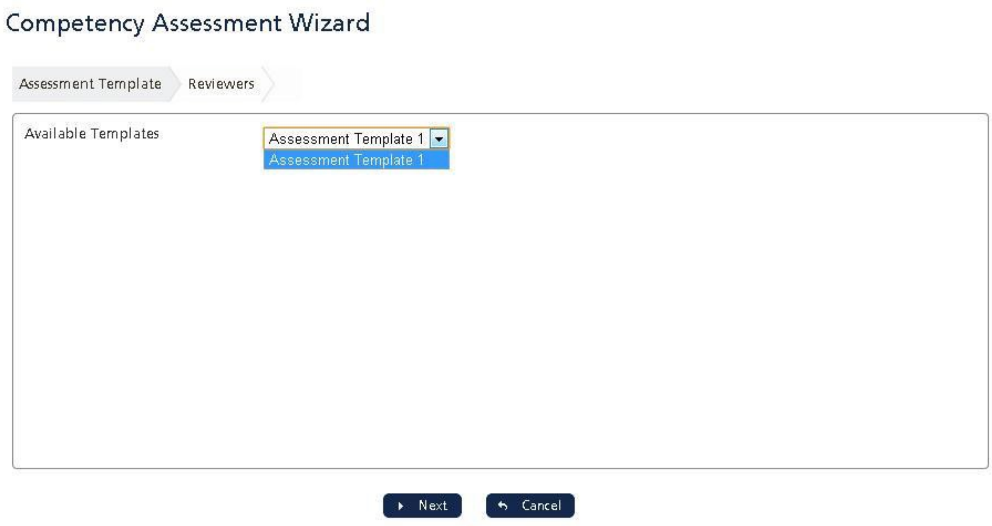
Competency Assessments

(Available for Performance only)

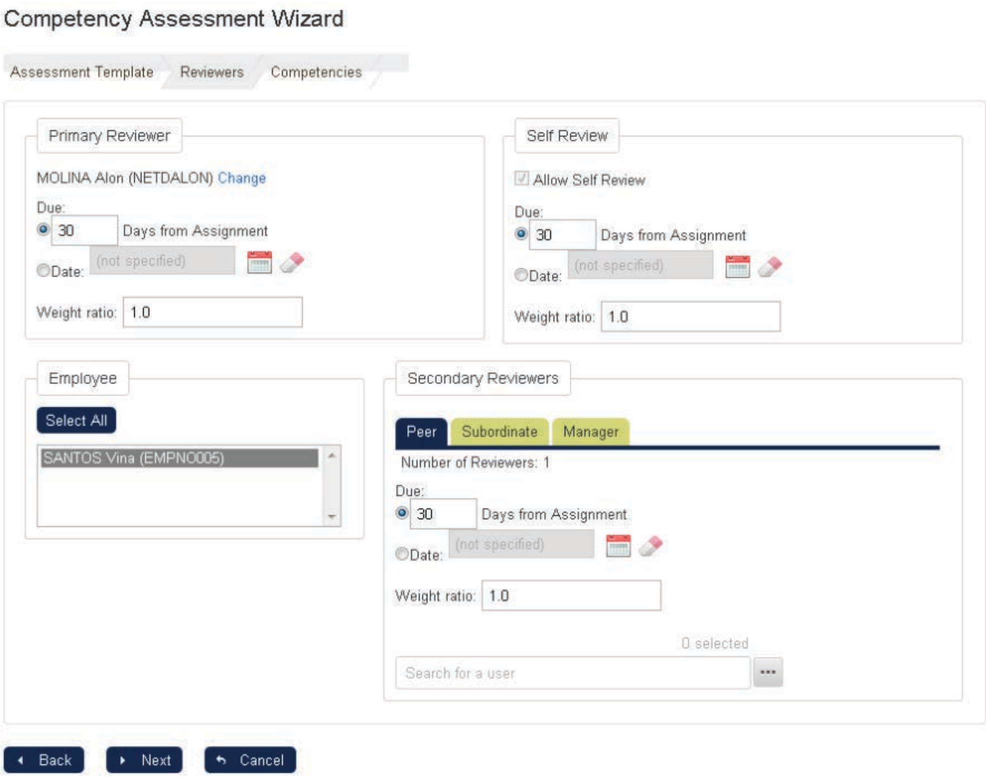
Deploying Competency Assessments

To deploy an assessment:

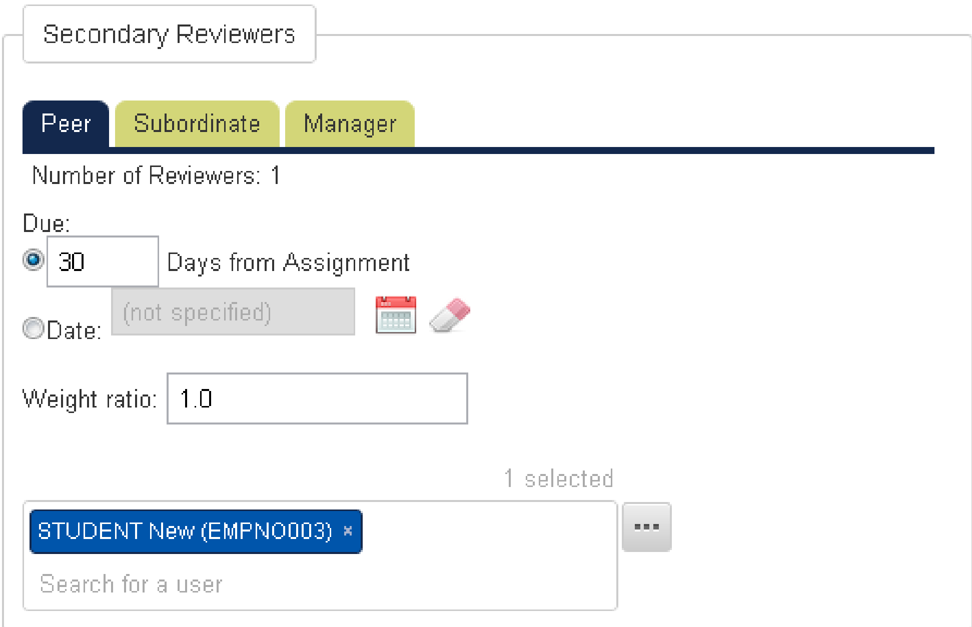
1. Go to Workspace > Review
2. Click "Deploy Assessment" under the individual cogs or select multiple individuals and use the bulk action drop down. The Competency Assessment Wizard appears.



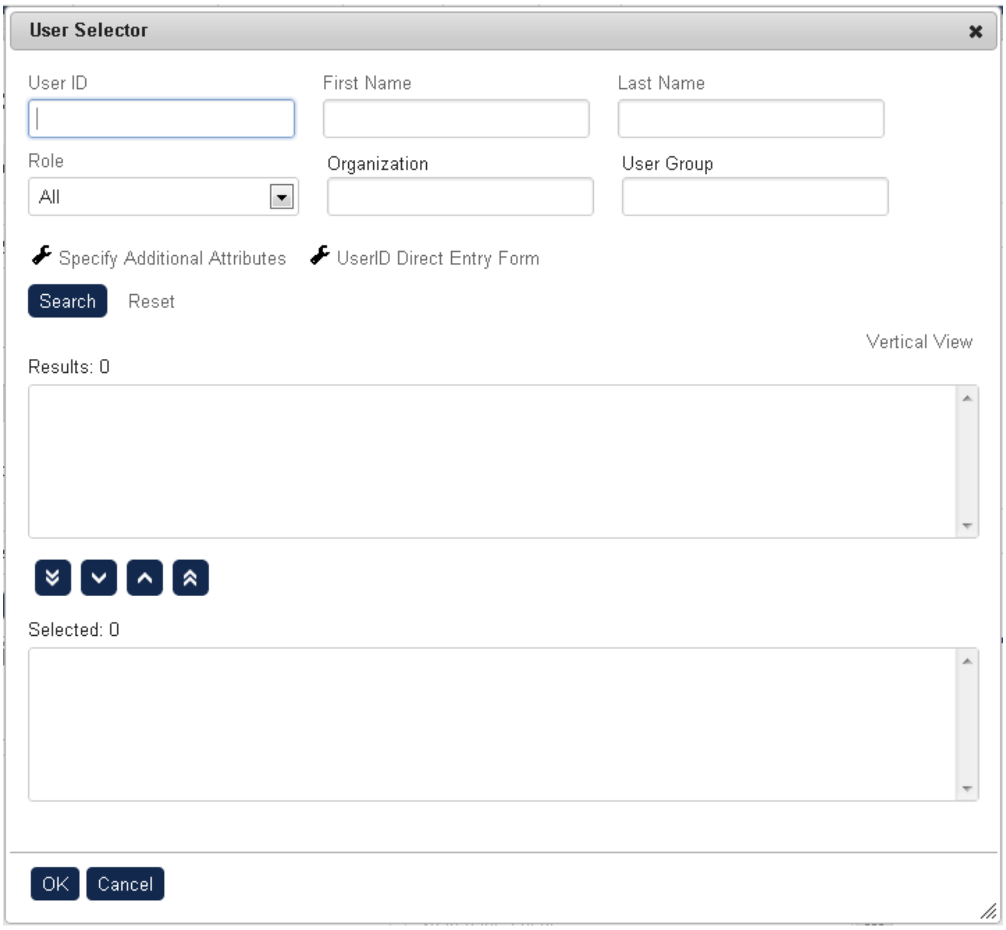
3. Select the assessment template you want to use, then click **Next.**
4. The screen refreshes and displays the **Reviewers** tab.



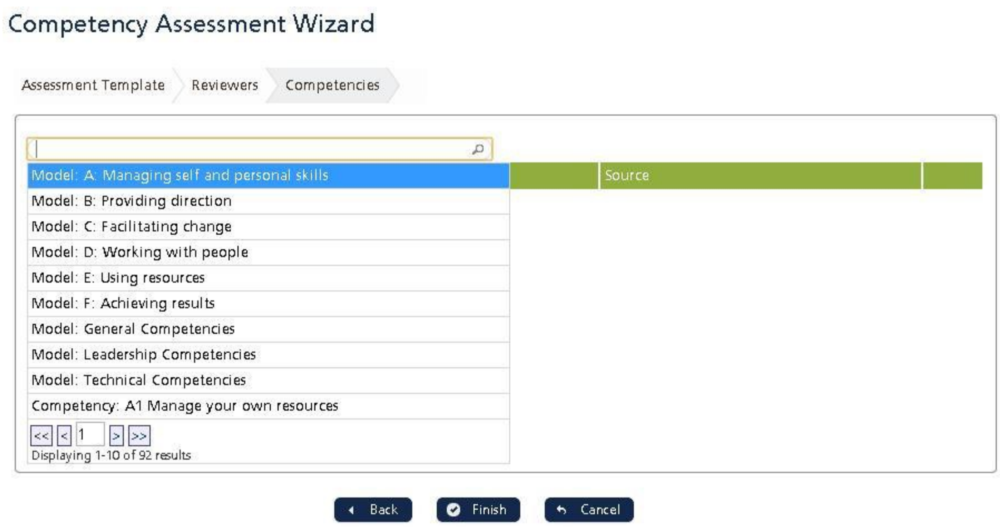
5. If users want to add a secondary reviewer, click the **AddReviewers** link, then click **Next**



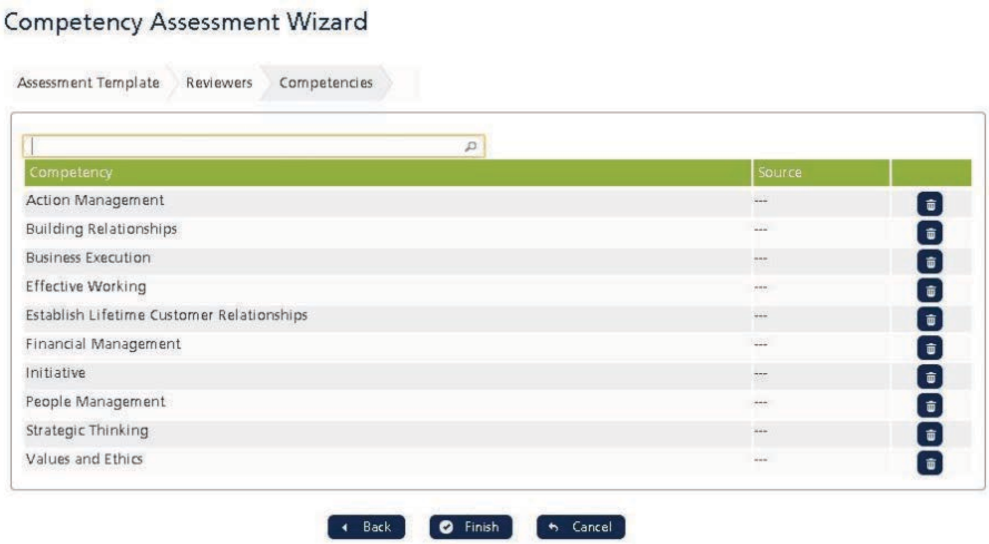
6. On this screen, you can review the list of of reviewers and reviewees. For secondary reviewers they cannot be the same person as the primary reviewer. In addition to this, the number of secon dary reviewers must be the same number specified in the assessment template. Users can also switch between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



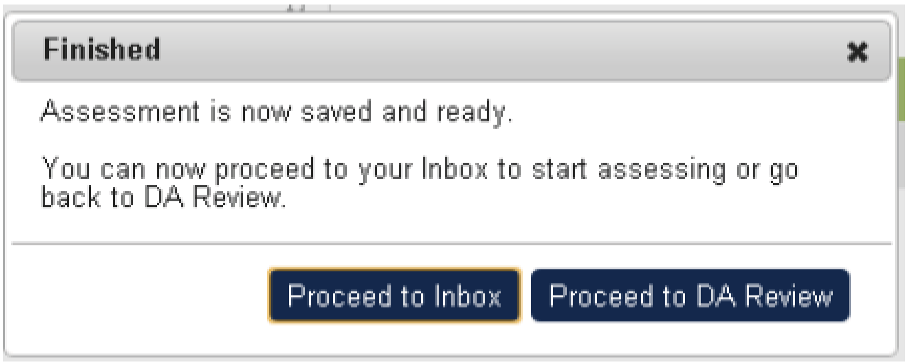
7. Select the competency model you want to use. The user can remove any user selection with the cross on the right-hand side.



8. The screen refreshes back to the **Competencies** tab, which now lists the competencies on the s creen. 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.



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

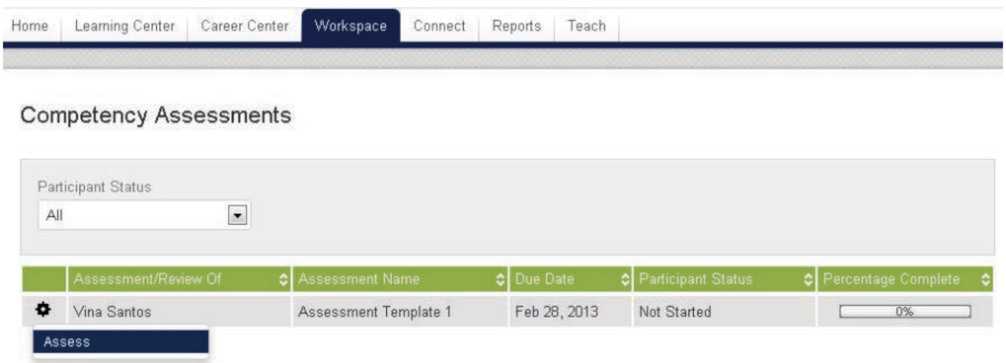


10. Select **Proceed to DA Review** to proceed with the review, otherwise select **Proceed to Inbox** to lead you back to the **Competency Assessment** screen.

Completing a Competency Assessment

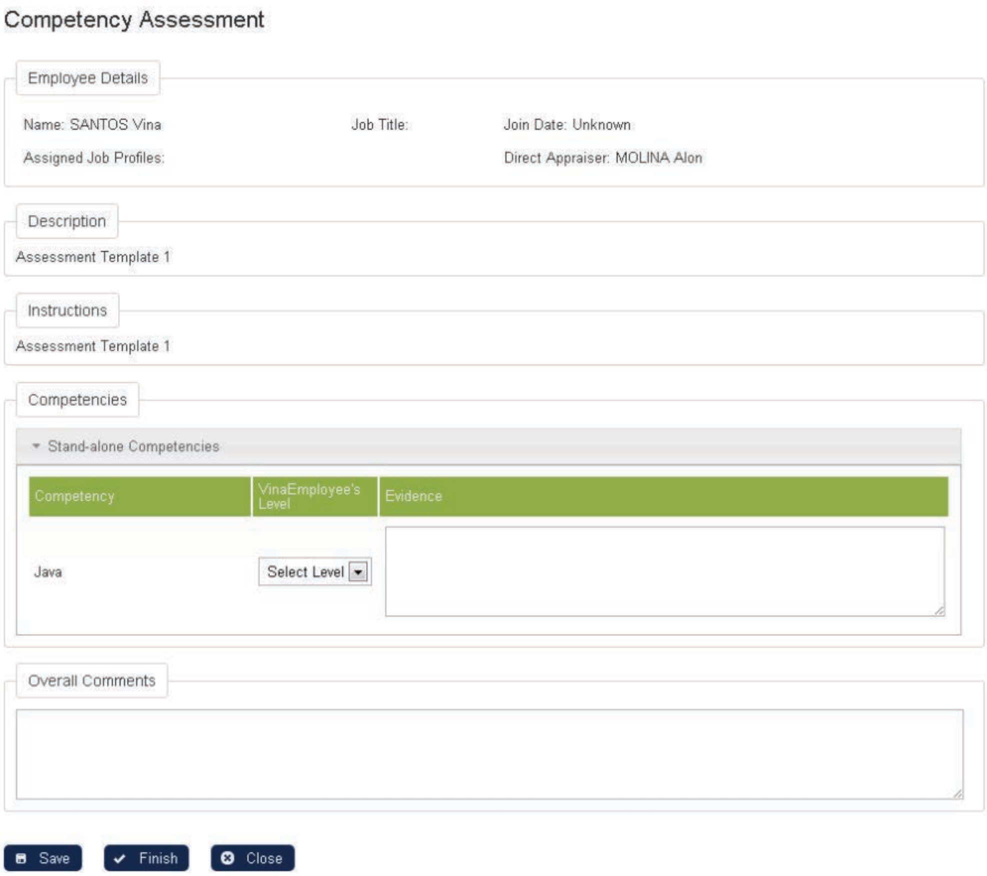
To assess the learner's competency,

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

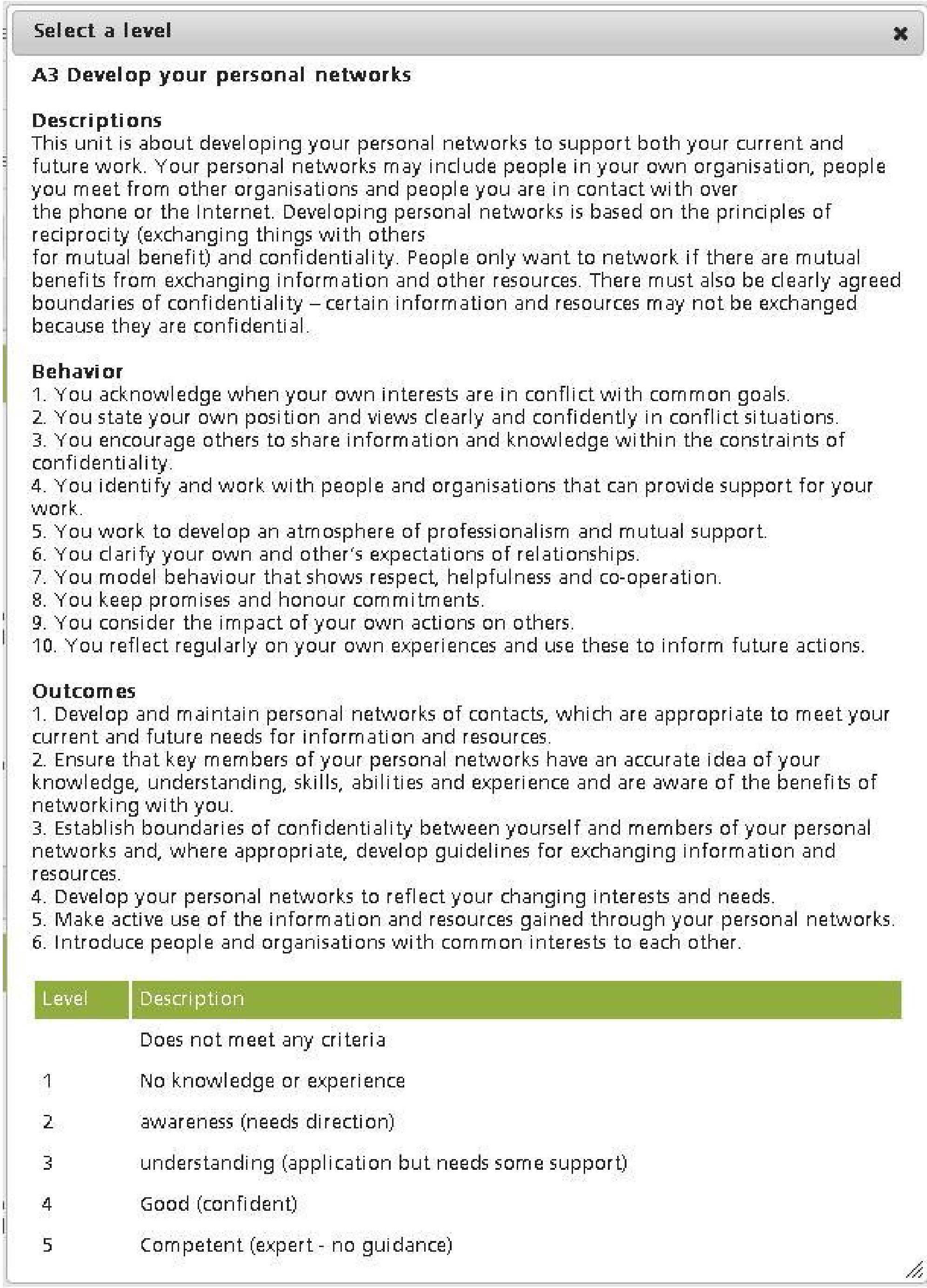


3. This leads you to *CompetencyAssessment* page. This displays the details about the reviewee, description about the assessment template, and instruction (if specified) on how to execute the

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



4. 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.

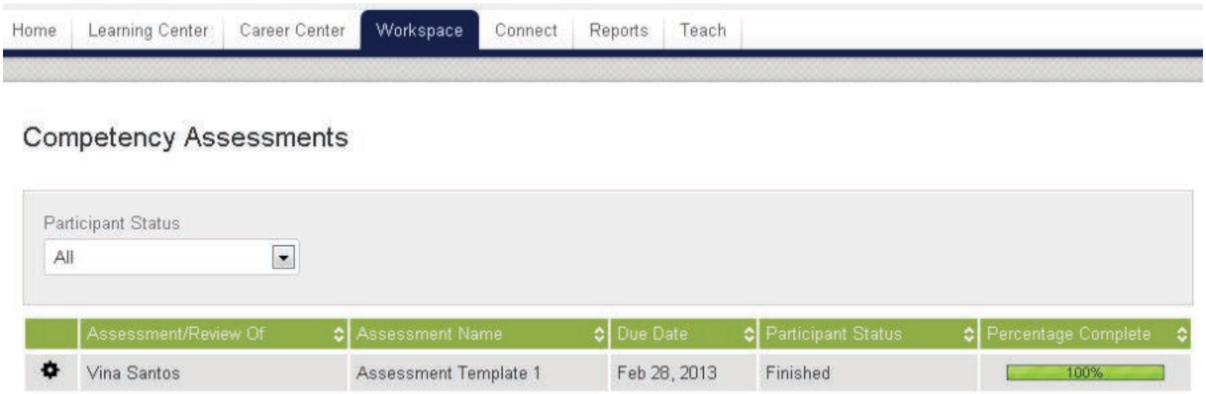
Level	Description
	Does not meet any criteria
1	No knowledge or experience
2	awareness (needs direction)
3	understanding (application but needs some support)
4	Good (confident)
5	Competent (expert - no guidance)

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 Assessme nt* screen. The calculation of the percentage is (number of assessed competencies) / (total number of c ompetencies + 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%.



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

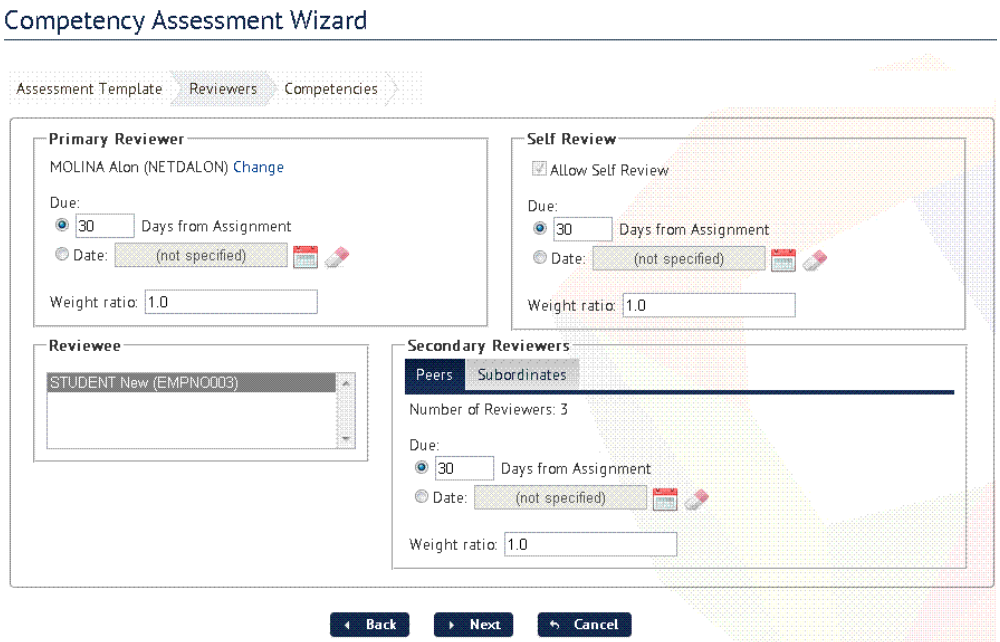
Once the reviewer completes the assessment, click the **Finish** button. This returns to Competency Assessment screen with the updated percentage completion.

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.

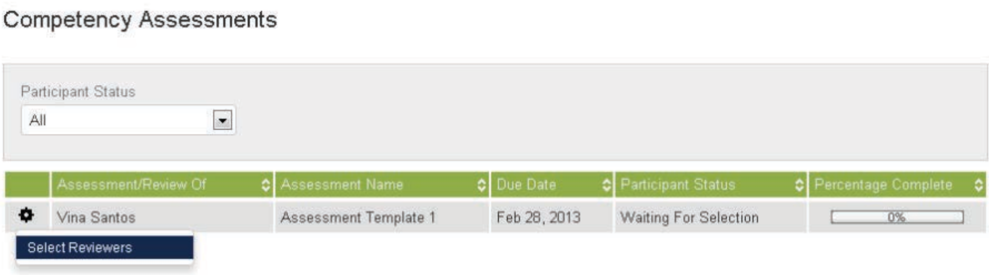
Secondary Reviewers Selection by Employees

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

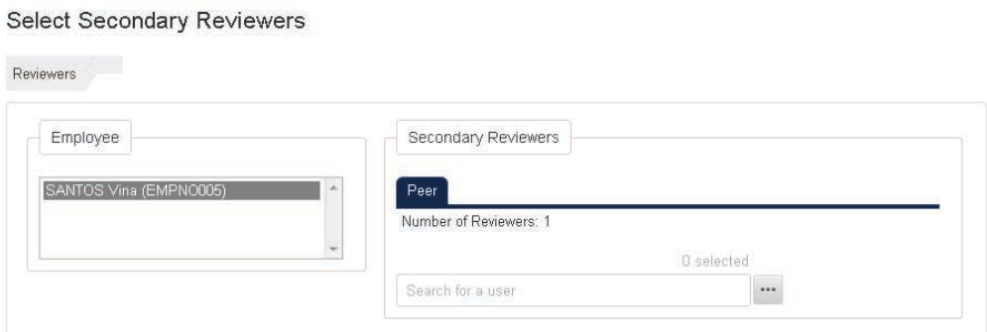
The Primary Reviewer is no longer required to select the secondary reviewers during assessment depl oyment. Notice that the **Add Reviewers** link under the **Secondary Reviewers** section is not available.



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

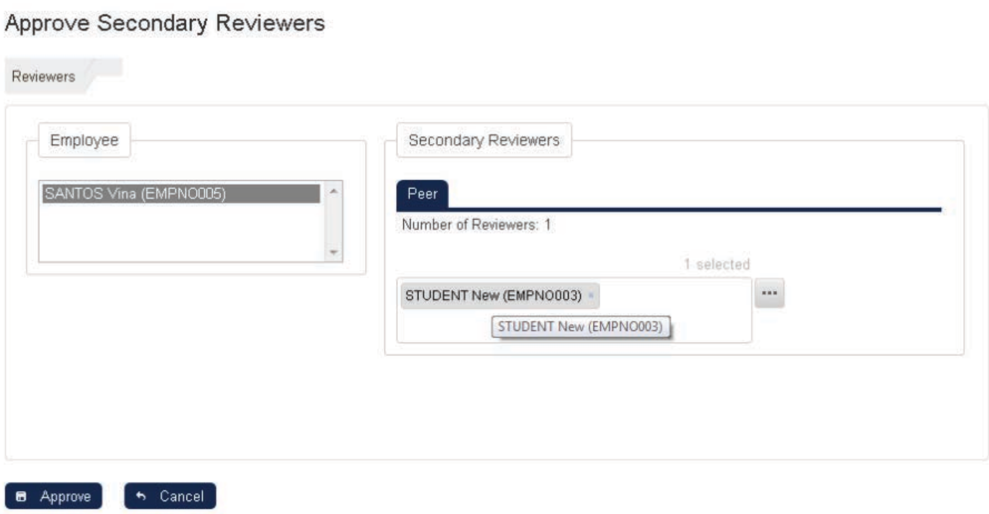


The selection process is very similar to the deployment screen where the Reviewee is required to selec t the required number of Secondary Reviewers from a list.



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

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



Once the Primary Reviewer approves the selection, those selected Secondary Reviewers will be able t o start the Competency Assessment.

Note:

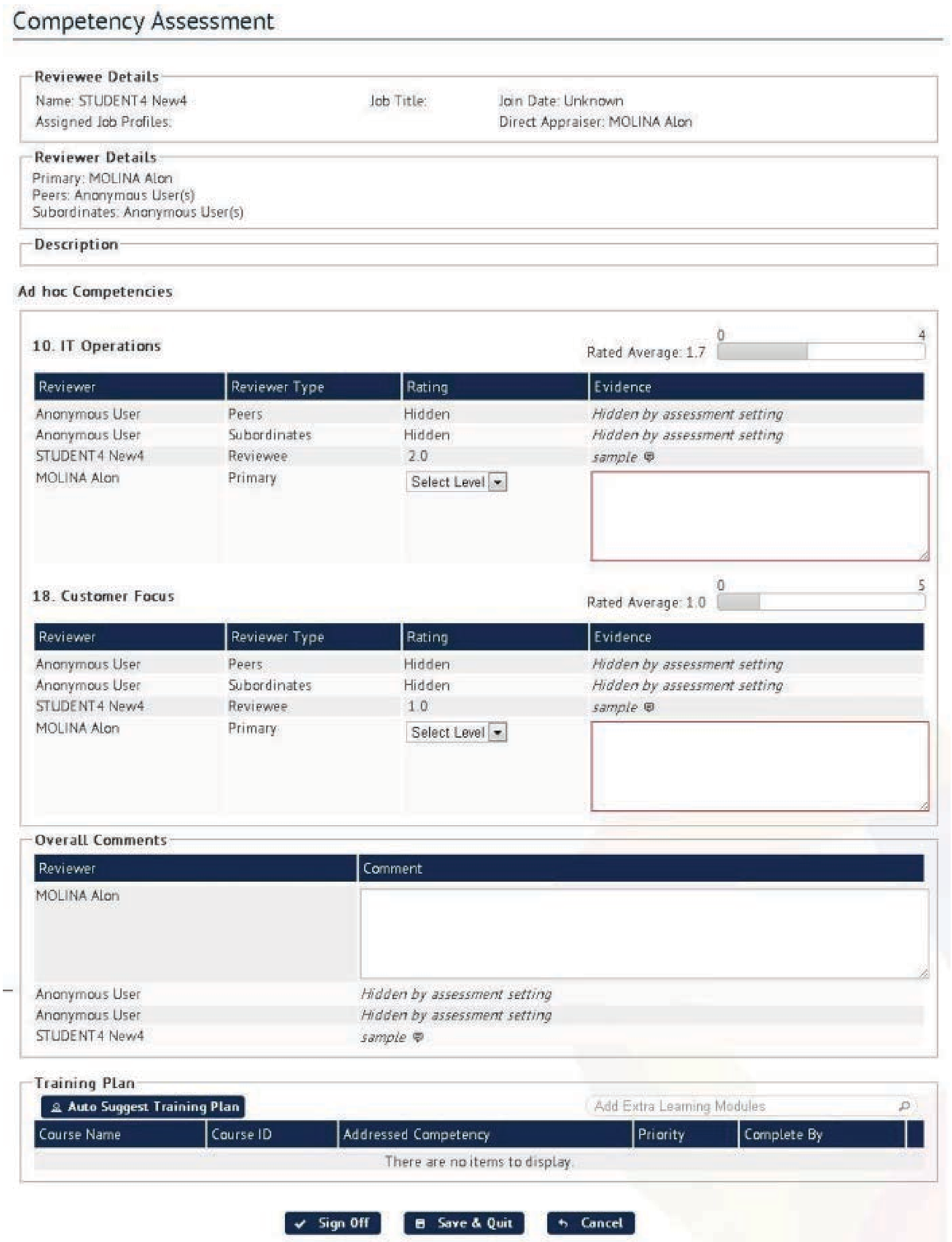
- Reviewee will not be able to start assessment until all the Secondary Reviewers have been sele cted.
- Primary Reviewer will not be able to sign off the assessment until all Secondary Reviewers have completed the Competency Assessment.

Controlling Final Rating (by Primary Reviewer)

The user rating for a competency is calculated using the average of all ratings assessed by the reviewe rs. Talent Suite provides a way for the Primary Reviewer to control the final rating given to the user. Wit h this setting set in the assessment template, the Primary Reviewer will not be able to start his/her asse ssment 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.* :



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 includ ed (configurable in the template).

Allowing Secondary Reviewers to Finish Partial Assessments

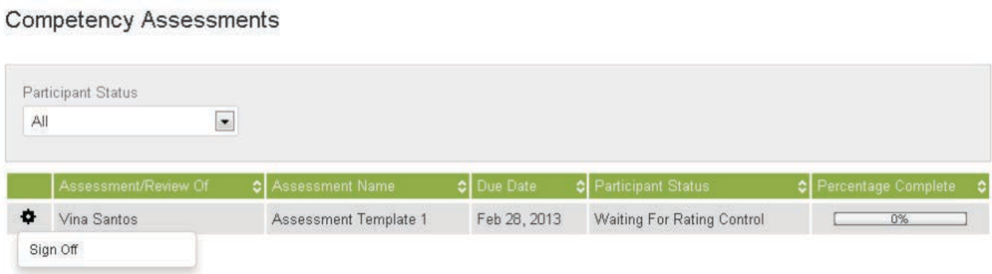
On the access control setting of the competency assessment template, it allows the secondary reviewe rs to finish partial assessment. This means that secondary reviewers will have the ability to bypass the assessment of certain competencies as they wish. The secondary reviewers will be able to select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

Sign-off the Competency Assessment

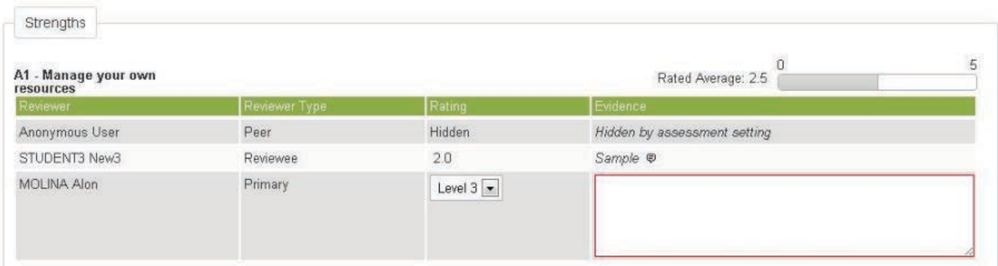
Once all the reviewers have finished the Competency Assessment, the Direct Appraiser can sign off th e assessment to finalize it. The Sign Off page would display the following information:

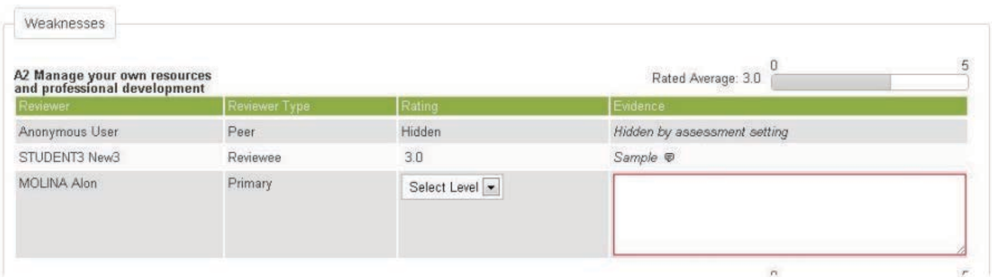
- Reviewee Details such as Name, Job Title, Join Date, Assigned Job Profiles, and Direct Apprais er
- All the reviewee's job profiles & competencies categorized into strengths and weaknesses
- Each competency would have its required level, reviewee's average level, and the computed ga p
- Evidence and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

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

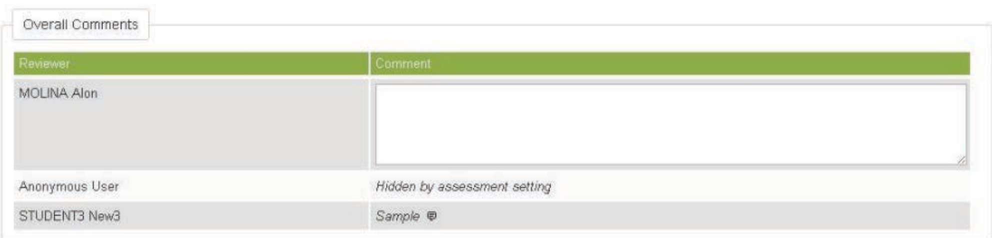


The summary of the appraisee's assessment appears. The final reviewer needs to assess the appraise e by providing the strengths and weaknesses ratings for each competency. The reviewer can also provide evidences on the space provided.



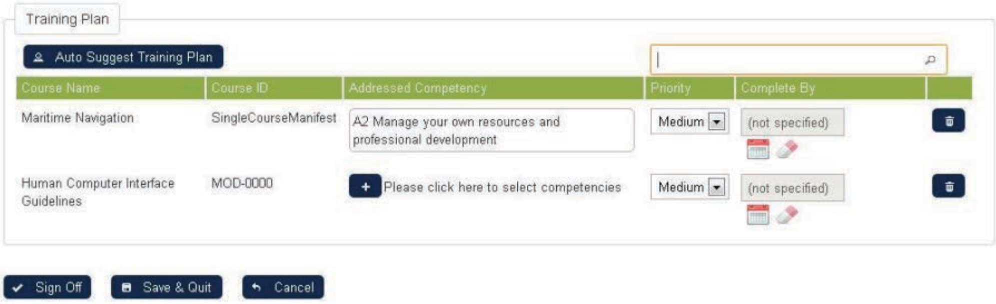


Apart from the comments/evidences for each competency, the final reviewer can also provide his/her overall comments about the appraisee.

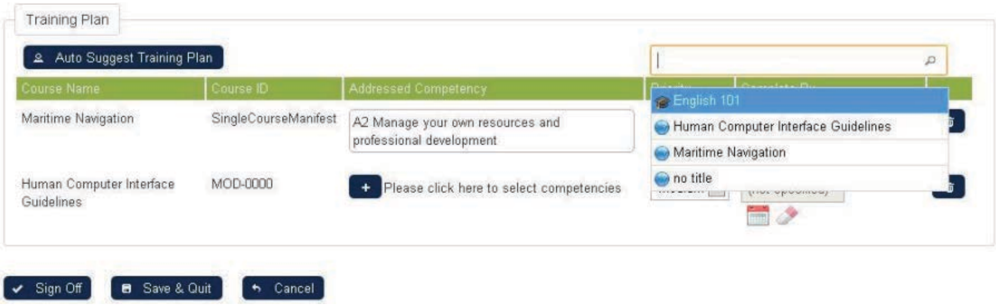


Before completing the sign off, the final reviewer can also able to suggest a training plan to the reviewee based on his/her weaknesses using the "**Auto Suggest Training Plan**" or manually searching for Courses.

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:



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:

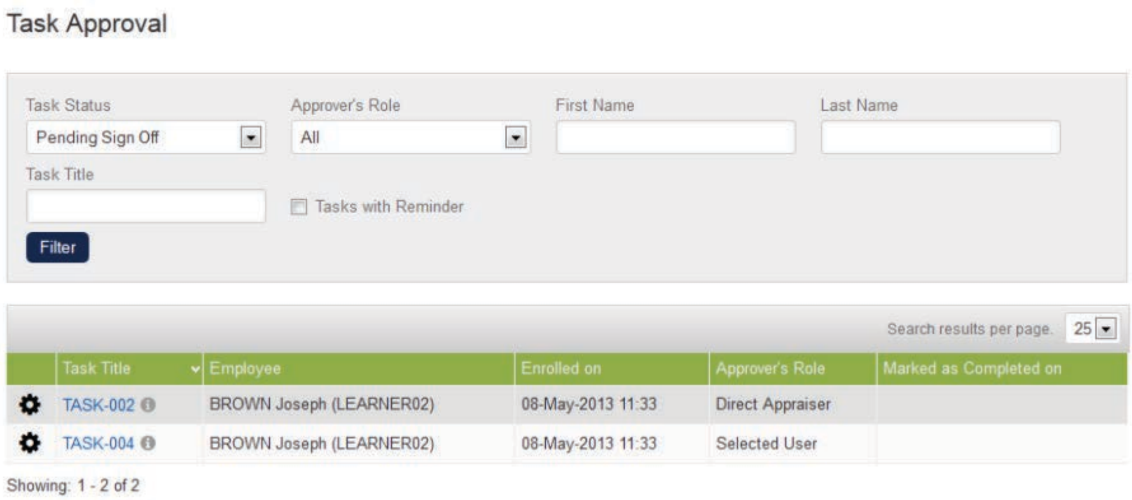


Click the **Sign Off** button once the competency assessment is completed. The reviewer has the option to save and quit the competency assessment screen.

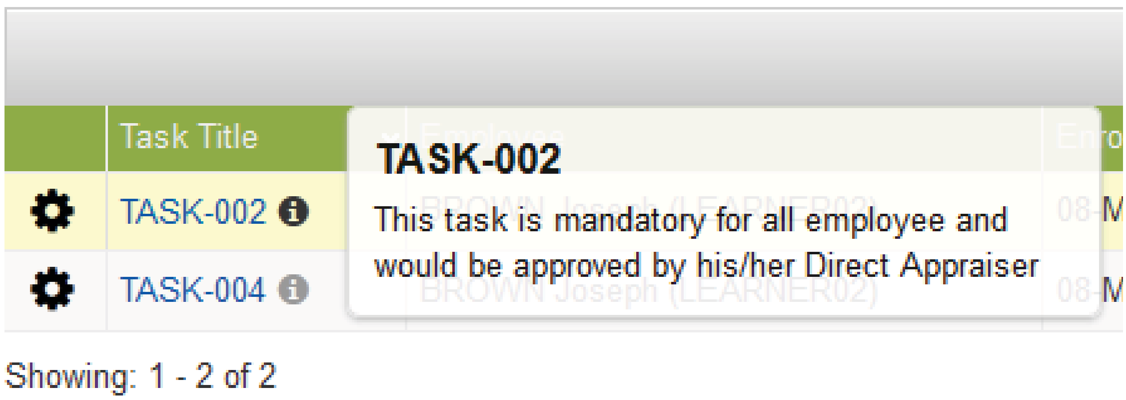
Task Approval

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

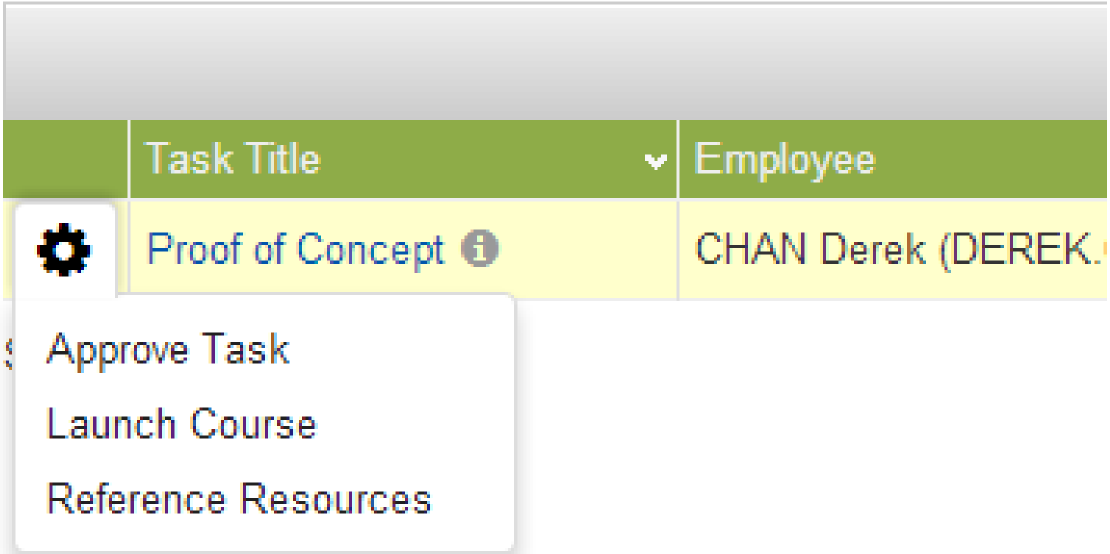
1. Go to **WorkSpace > Task Approval**. Use search criteria if necessary and then click **Filter**



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



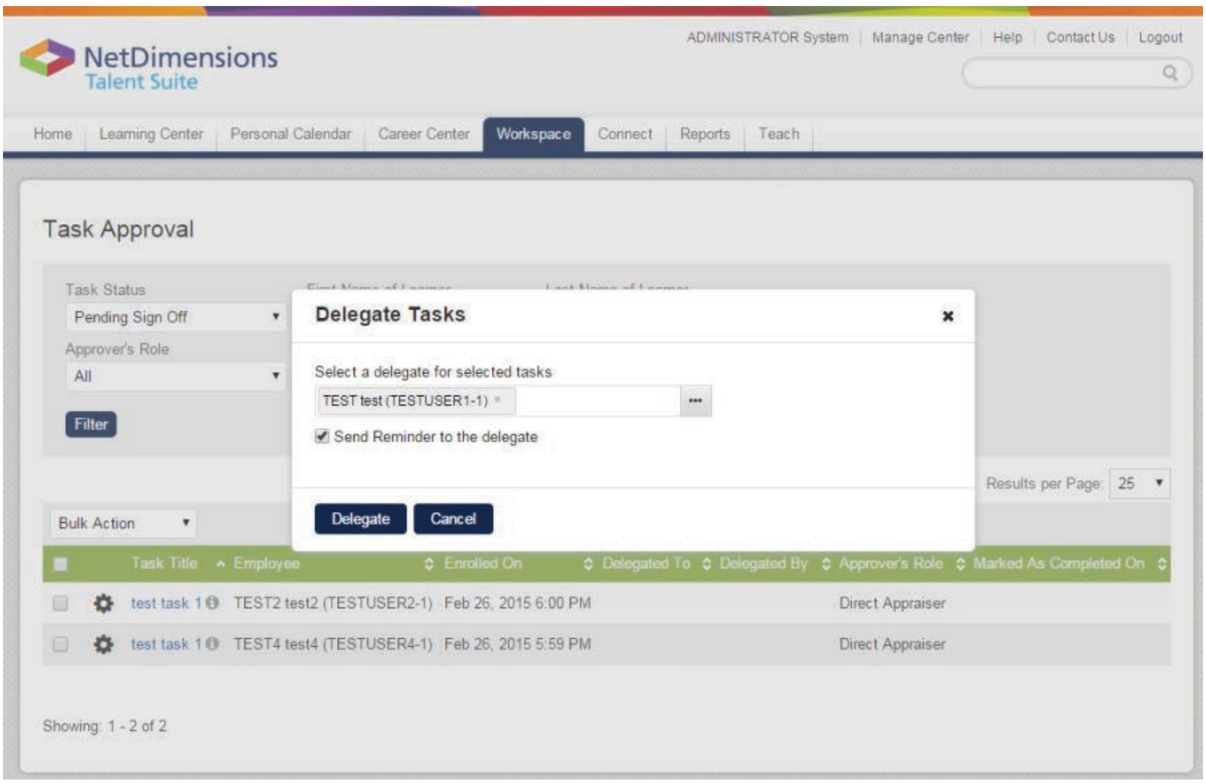
3. You can see more detailed information about the task before approving it by launching it or examining reference resources via the **Tool** icon



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

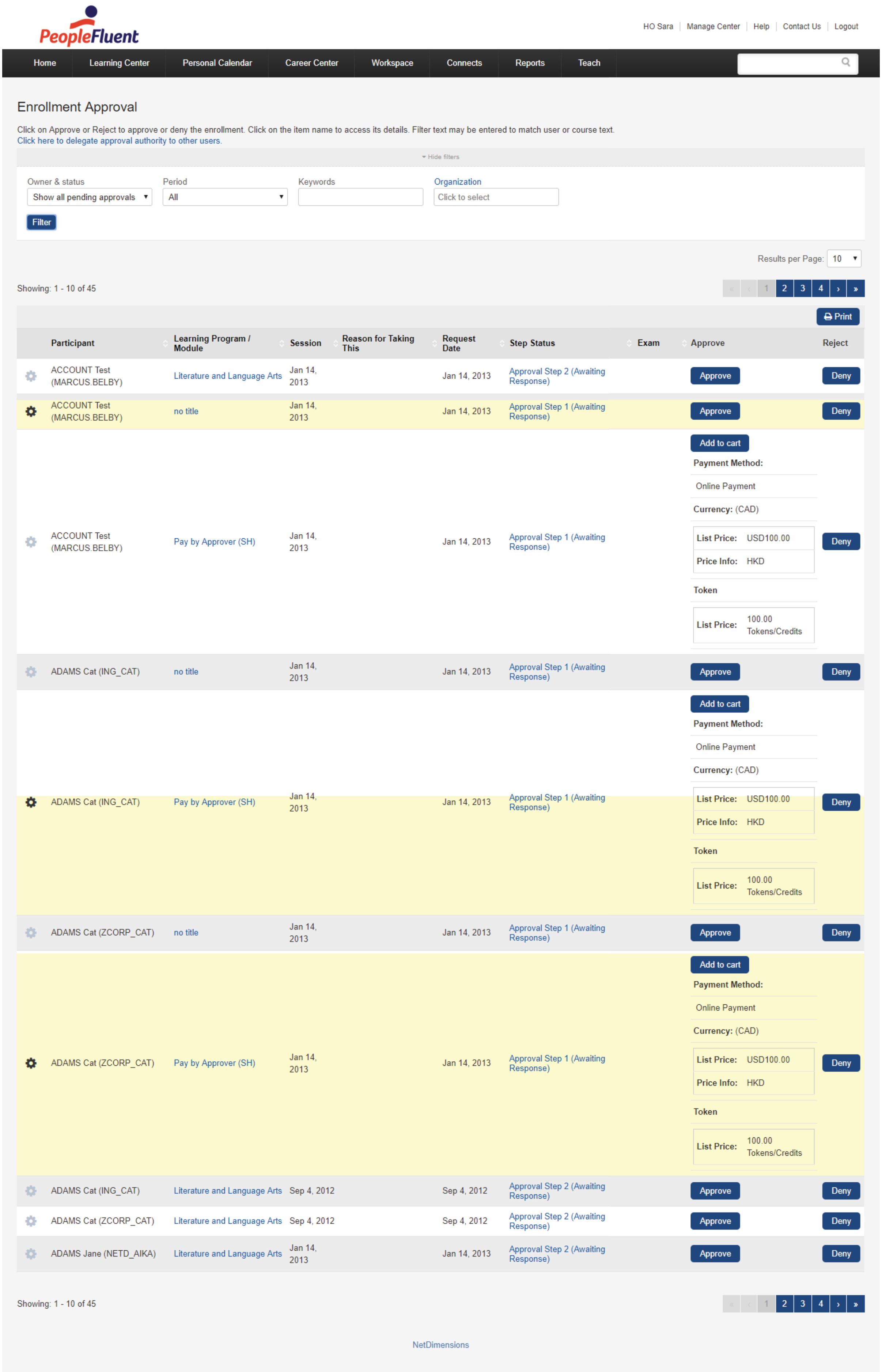
(Available for Performance and Learning only)

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.

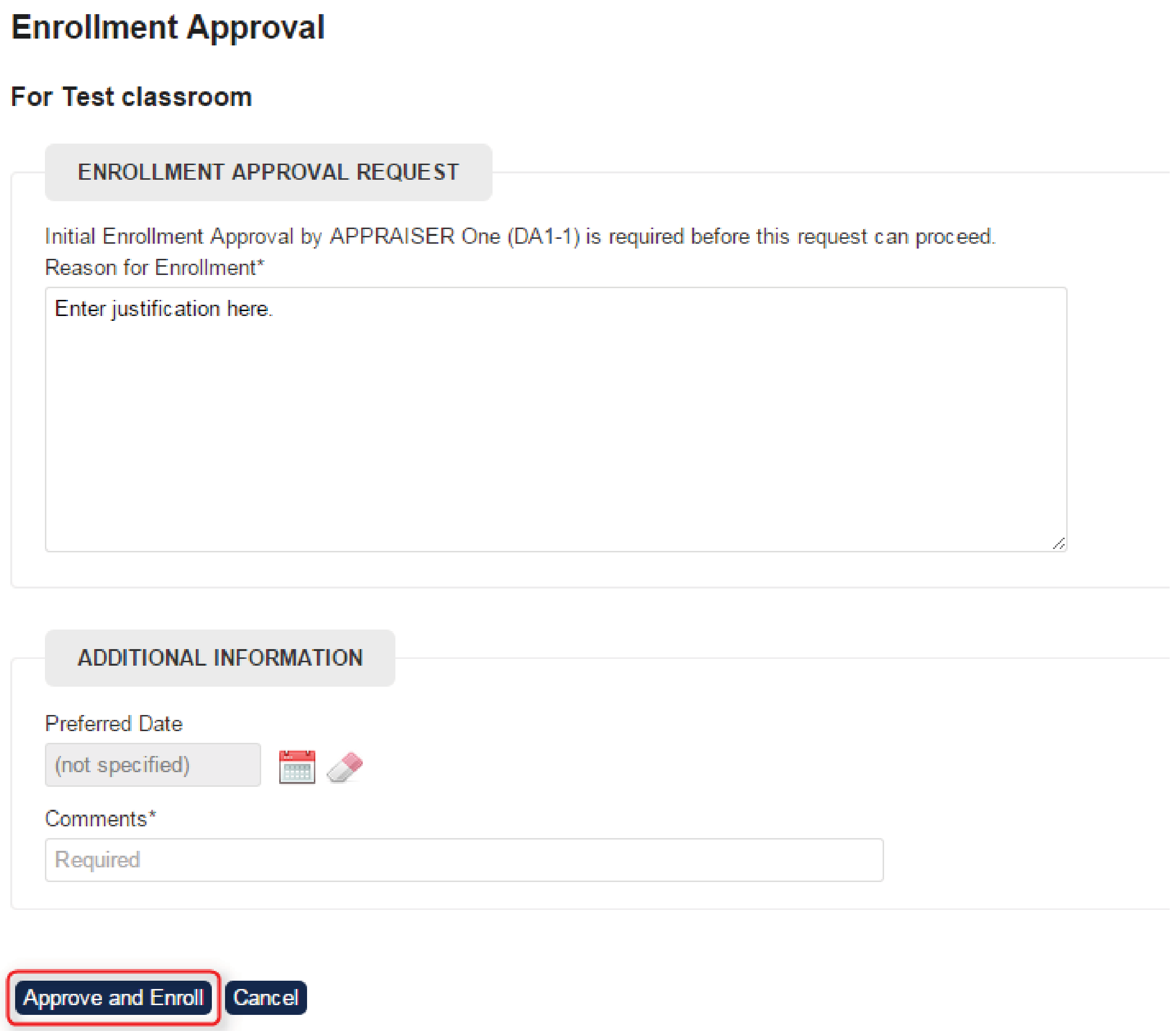
Note: Click on the item name to access its details. Filter text may be entered to match user or course text.


PeopleFluent
HO Sara | Manage Center | Help | Contact Us | Logout
Home
Learning Center
Personal Calendar
Career Center
Workspace
Connects
Reports
Teach
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
1 2 3 4
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)
Approve
Deny
ACCOUNT Test (MARCUS.BELBY)
no title
Jan 14, 2013
Jan 14, 2013
Approval Step 1 (Awaiting Response)
Approve
Deny
Add to cart
Payment Method:
Online Payment
Currency: (CAD)
List Price: USD100.00
Price Info: HKD
Token
List Price: 100.00 Tokens/Credits
ACCOUNT Test (MARCUS.BELBY)
Pay by Approver (SH)
Jan 14, 2013
Jan 14, 2013
Approval Step 1 (Awaiting Response)
Deny
ADAMS Cat (ING_CAT)
no title
Jan 14, 2013
Jan 14, 2013
Approval Step 1 (Awaiting Response)
Approve
Deny
Add to cart
Payment Method:
Online Payment
Currency: (CAD)
List Price: USD100.00
Price Info: HKD
Token
List Price: 100.00 Tokens/Credits
ADAMS Cat (ING_CAT)
Pay by Approver (SH)
Jan 14, 2013
Jan 14, 2013
Approval Step 1 (Awaiting Response)
Deny
ADAMS Cat (ZCORP_CAT)
no title
Jan 14, 2013
Jan 14, 2013
Approval Step 1 (Awaiting Response)
Approve
Deny
Add to cart
Payment Method:
Online Payment
Currency: (CAD)
List Price: USD100.00
Price Info: HKD
Token
List Price: 100.00 Tokens/Credits
ADAMS Cat (ZCORP_CAT)
Pay by Approver (SH)
Jan 14, 2013
Jan 14, 2013
Approval Step 1 (Awaiting Response)
Deny
ADAMS Cat (ING_CAT)
Literature and Language Arts
Sep 4, 2012
Sep 4, 2012
Approval Step 2 (Awaiting Response)
Approve
Deny
ADAMS Cat (ZCORP_CAT)
Literature and Language Arts
Sep 4, 2012
Sep 4, 2012
Approval Step 2 (Awaiting Response)
Approve
Deny
ADAMS Jane (NETD_AIKA)
Literature and Language Arts
Jan 14, 2013
Jan 14, 2013
Approval Step 2 (Awaiting Response)
Approve
Deny
Showing: 1 - 10 of 45
1 2 3 4
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.



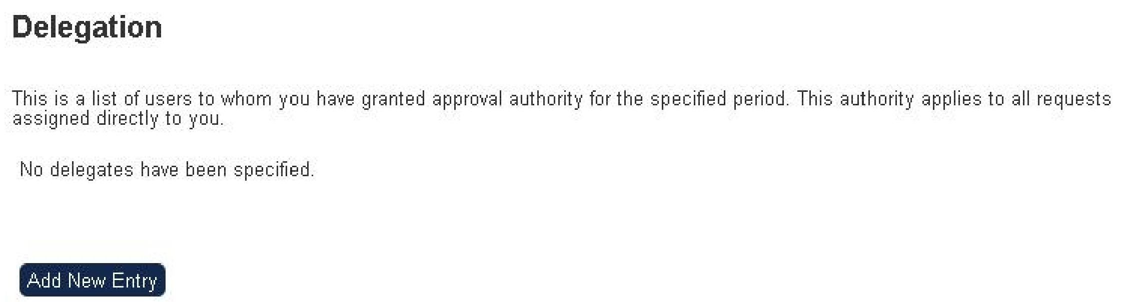
If the approval involves payment (or the learner is enrolling by him/herself), the button label will become "Submit Enrollment Request" and the payment, approval and enrollment steps will be performed separately.

Approval Delegation

(Available for Performance and Learning only)

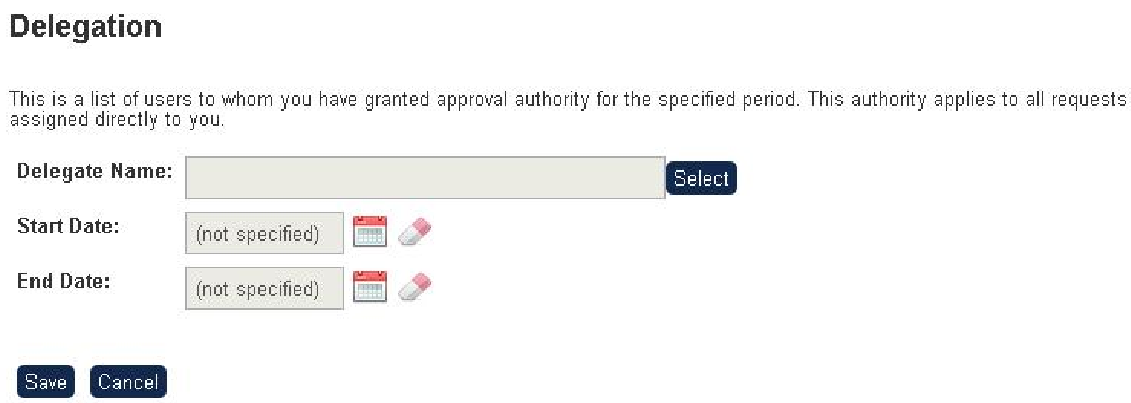
Managers and administrators may now delegate approval authority to other users for a specified period of time. This works for internal and external approvals. At **Workspace > Enrollment Approval**,:

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



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.

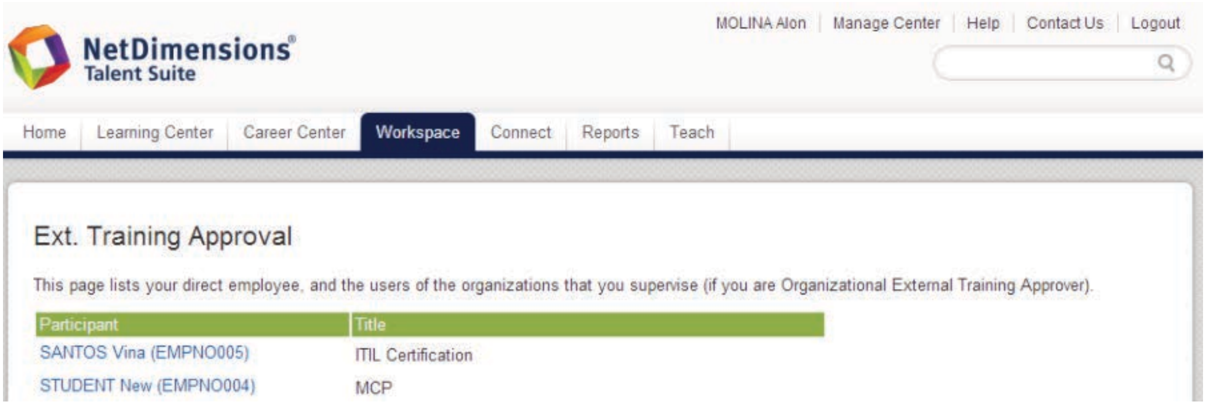


Click the **Save** button.

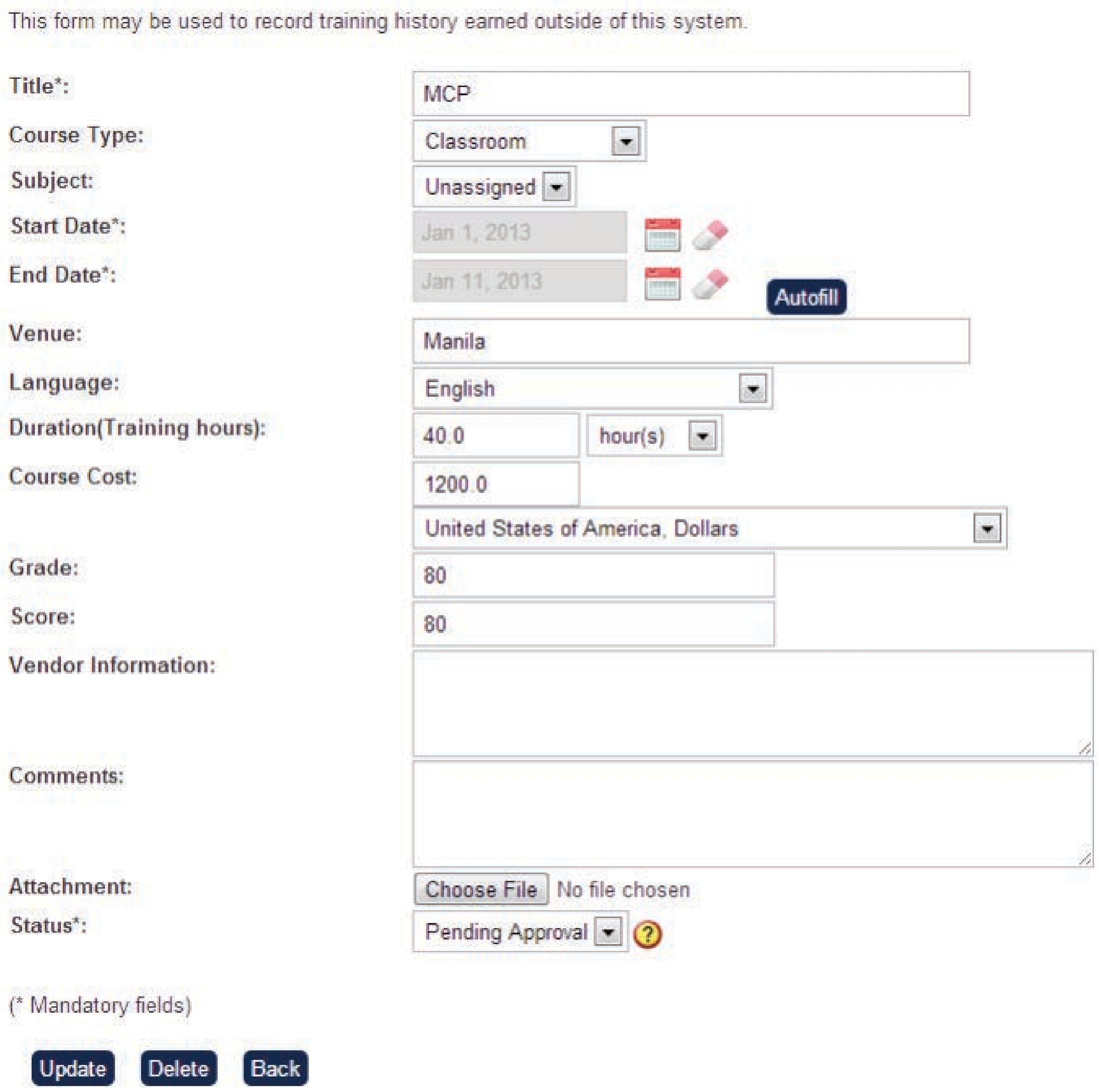
External Training Approval

(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":

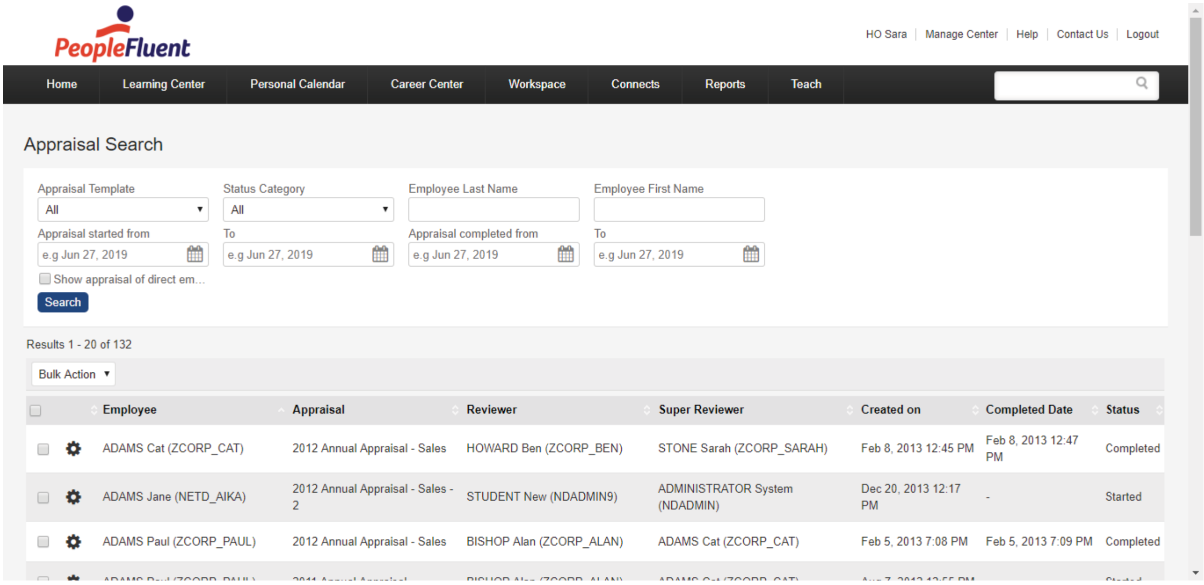


To allow a role to see external training approval requests, the "Is Organizational External Training Approver" Role Access Control must be set to "Yes".

Appraisal Review

(Available for Performance only)

Appraisals are accessed via Workspace > Appraisal Review:

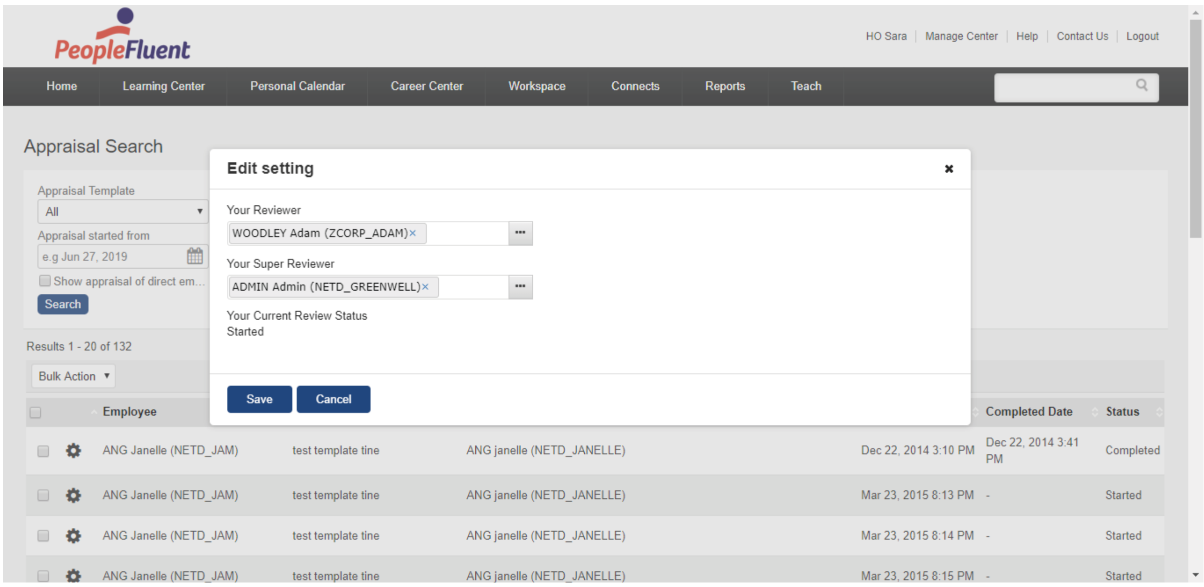


The Appraisal Review screen allows you to do the following:

- 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

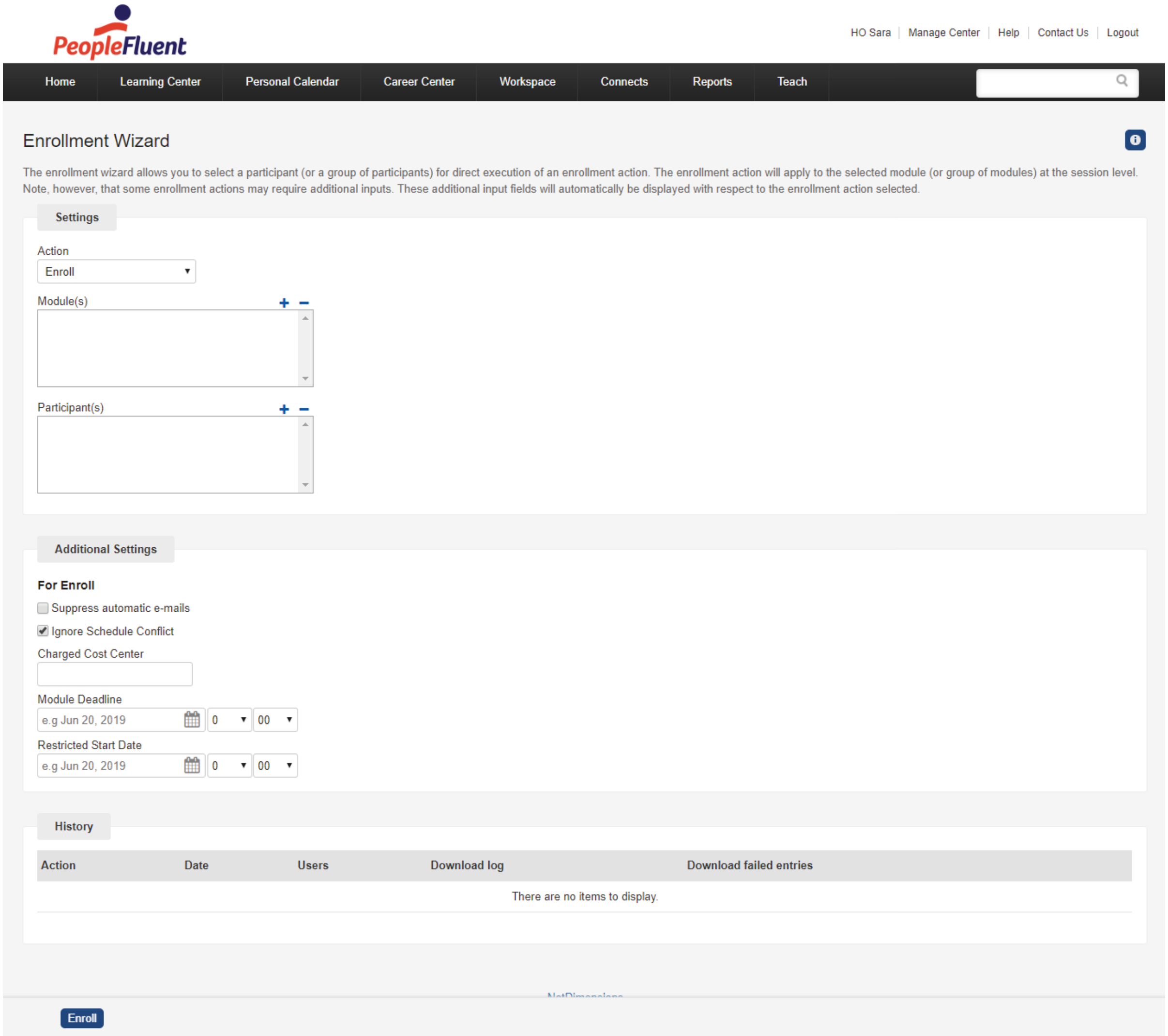
To modify the settings of an appraisal, on the **Appraisal Review** screen, click the **Tools** menu of the participant and then select **Change Setting:**



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:



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:

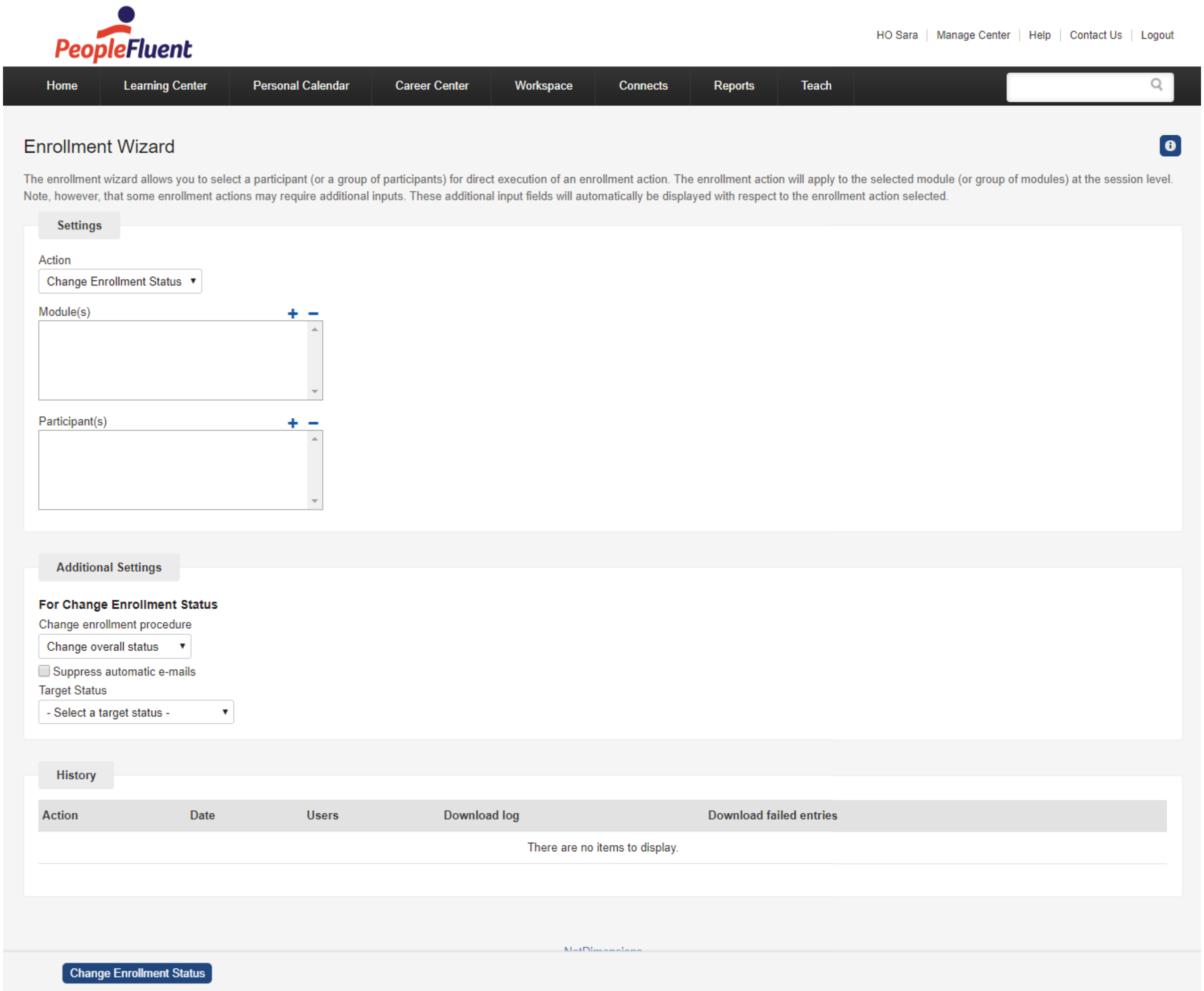
- Suppress automatic e-mails
- Ignore Schedule Conflict
- Charged Cost Center
- Module Deadline

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:

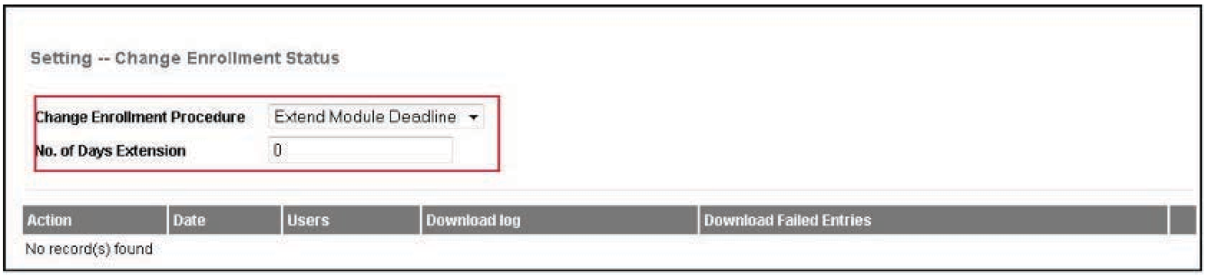
- Suppress automatic e-mails
- Target Status
  - If 'Withdrawn' is selected, you can opt to remove withdrawn transcripts by checking the "Do not keep withdrawal records" checkbox



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.

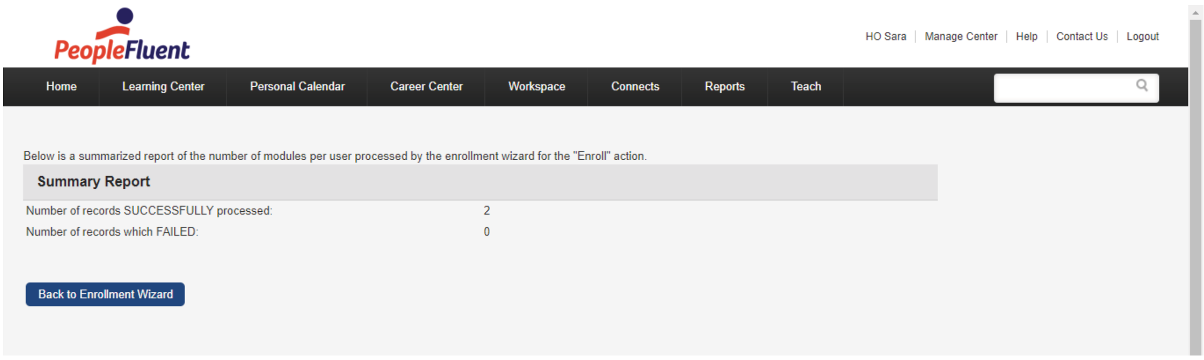
```
2013/May/09 11:53:04 Changing overall status for user [danny] on learning object [M1], session ID [EKP000000003] to "Completed"
2013/May/09 11:53:04 Transcript status for user [danny] on learning object [M1], session ID [EKP000000003]: Not Started
2013/May/09 11:53:04 Status change for user [danny] 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.



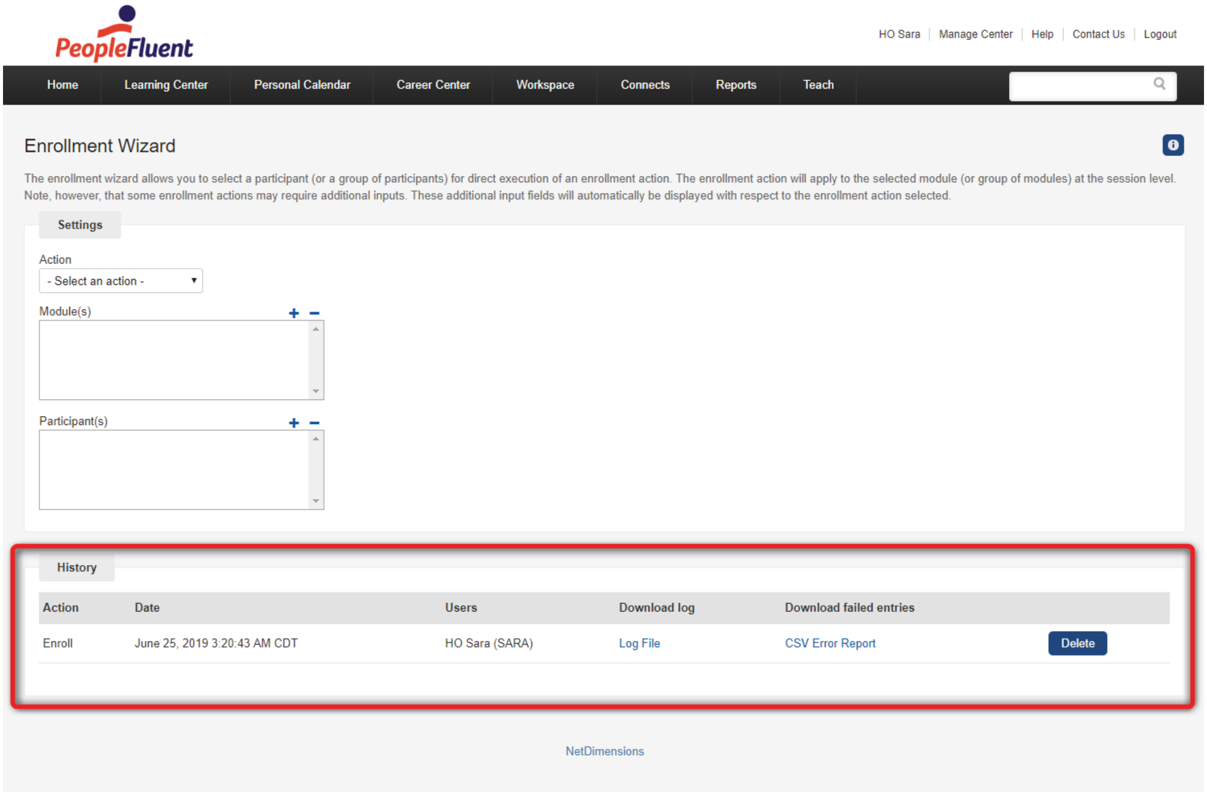
Summary Report

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



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.


PeopleFluent
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)
Log File
CSV Error Report
Delete
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 ***PASSED*** 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 2: Module Selection

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:

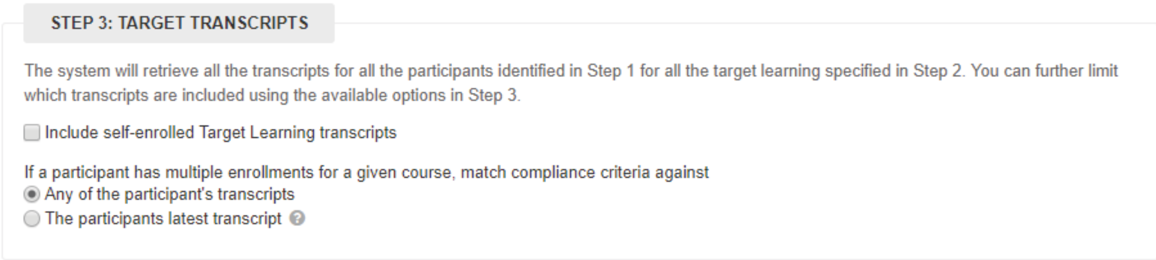
Transcript ID	Module ID	Status
T1	O1	Completed
T2	P1	In Process
T3	O1	Failed

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 4: Compliance Check

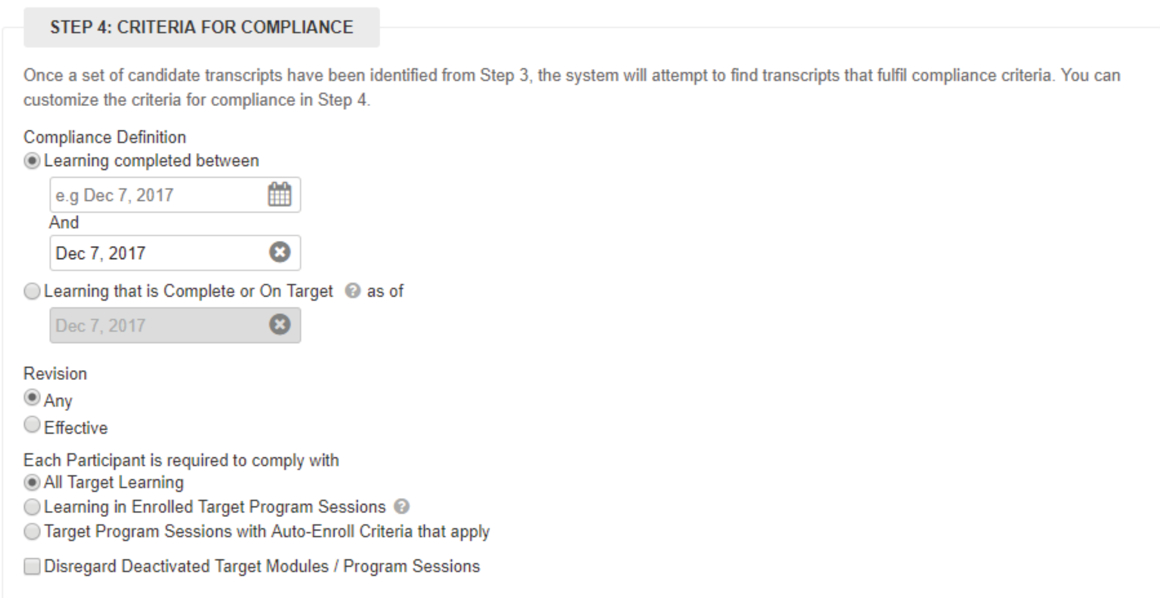
The following setting defines a transcript as compliant if it is on effective revision and either completed or on-target.

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 haves 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".

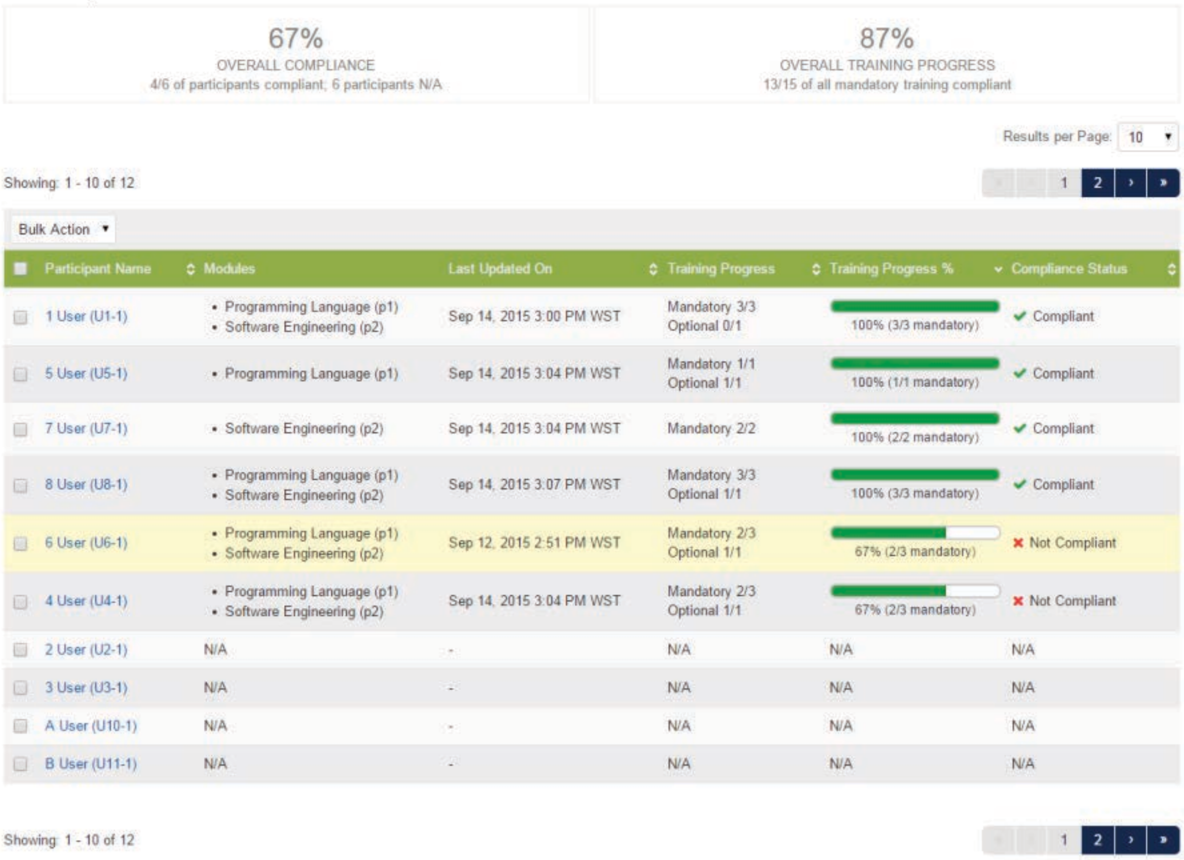


Step 5: Final Filtering

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.

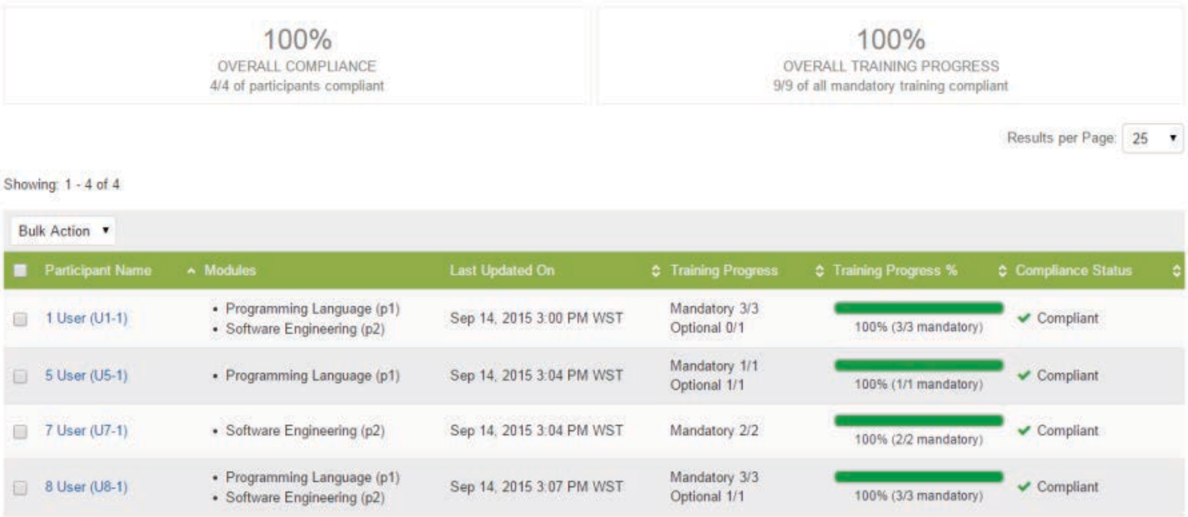
Step 6: Starting Analysis

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



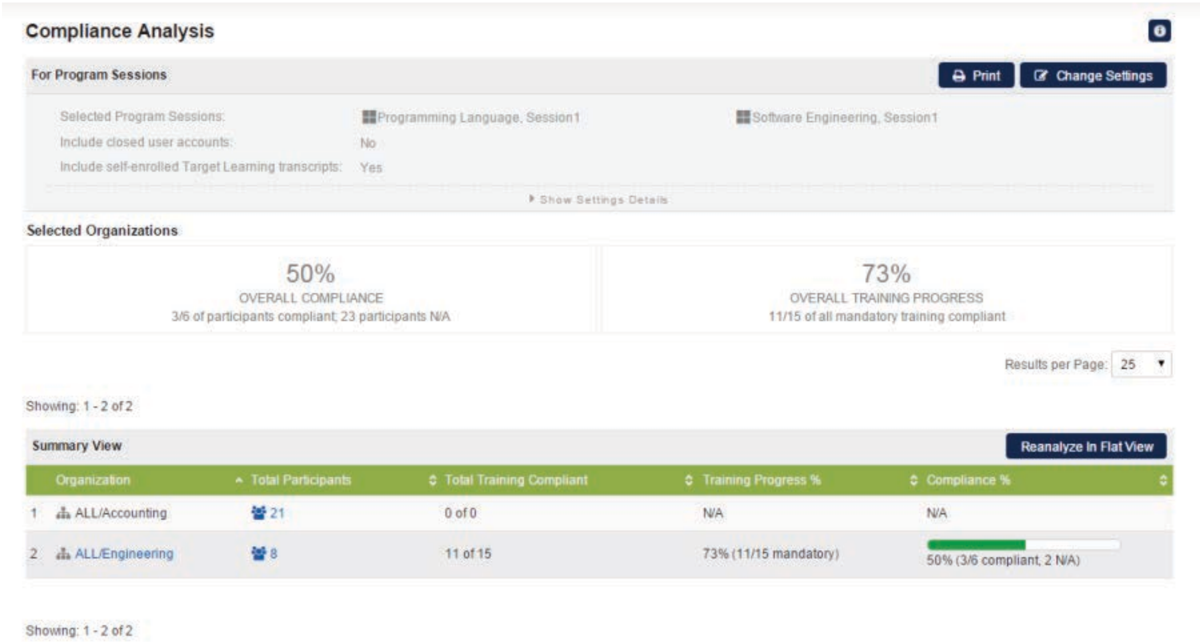
Participant Name	Modules	Last Updated On	Training Progress	Training Progress %	Compliance Status
1 User (U1-1)	• Programming Language (p1) • Software Engineering (p2)	Sep 14, 2015 3:00 PM WST	Mandatory 3/3 Optional 0/1	100% (3/3 mandatory)	Compliant
5 User (U5-1)	• Programming Language (p1)	Sep 14, 2015 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

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

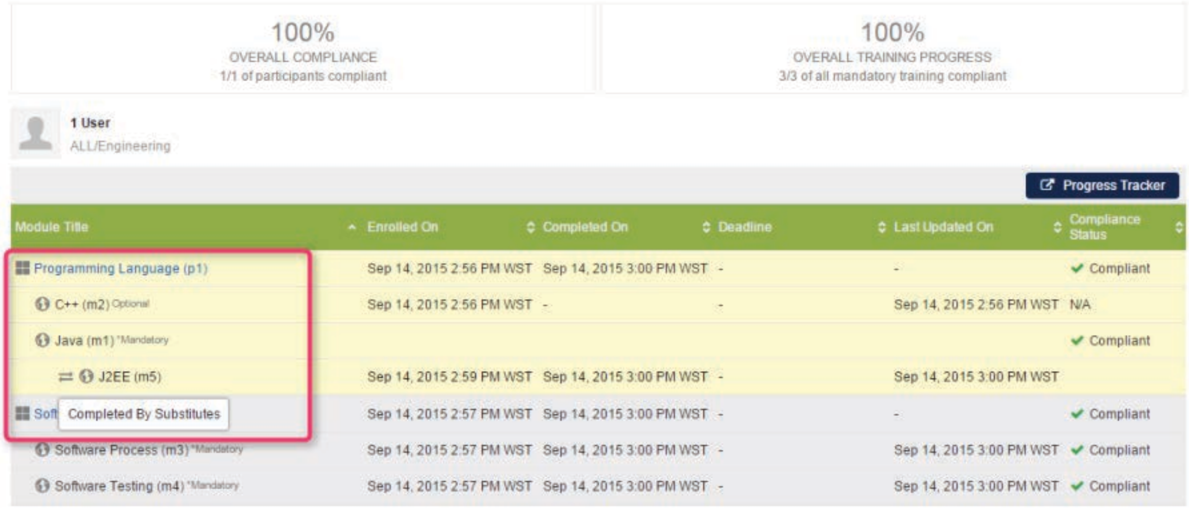


Usability

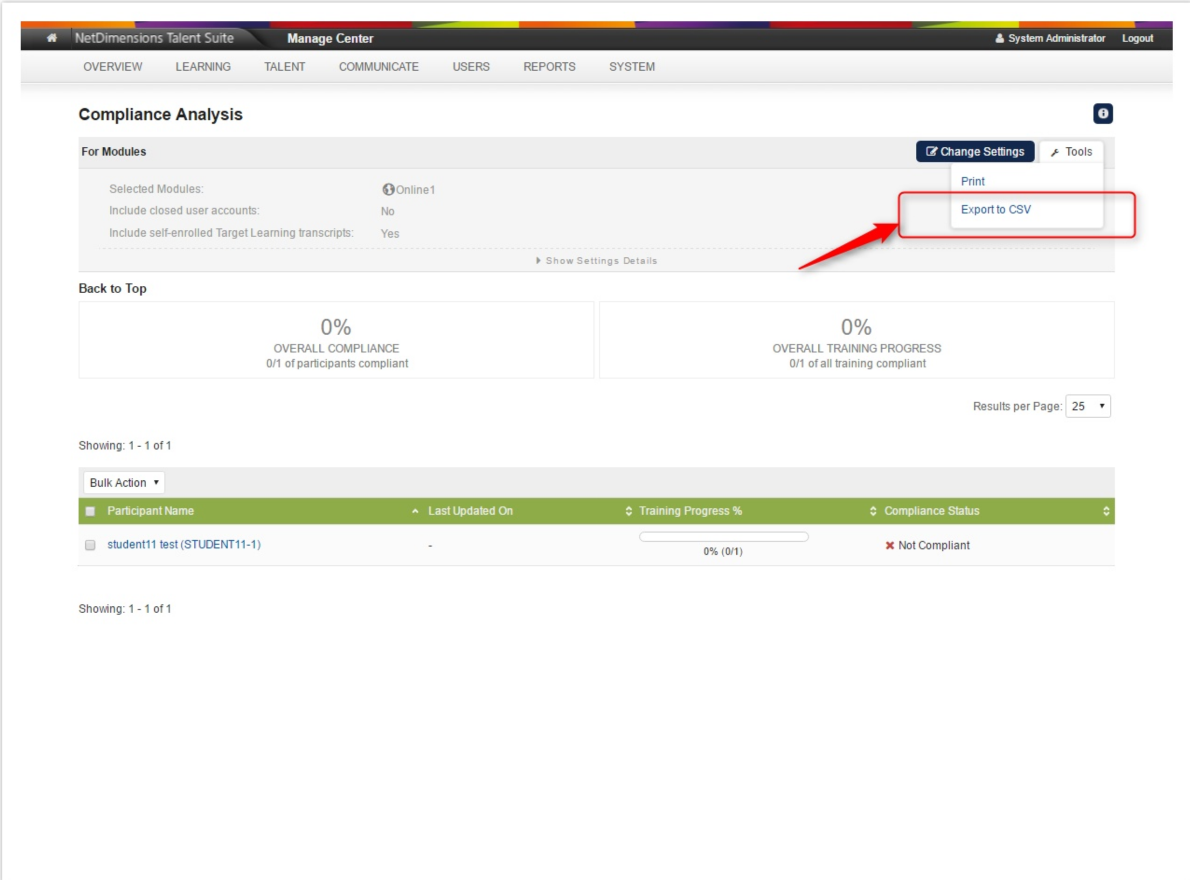
The Compliance Analysis screen lists inputs, highlights percentages, and shows the results with pagination. The Print button will present a print preview. The Change Settings button will go backward to the input page with your last input option settings preserved. Note that if participants are grouped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



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.



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



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)

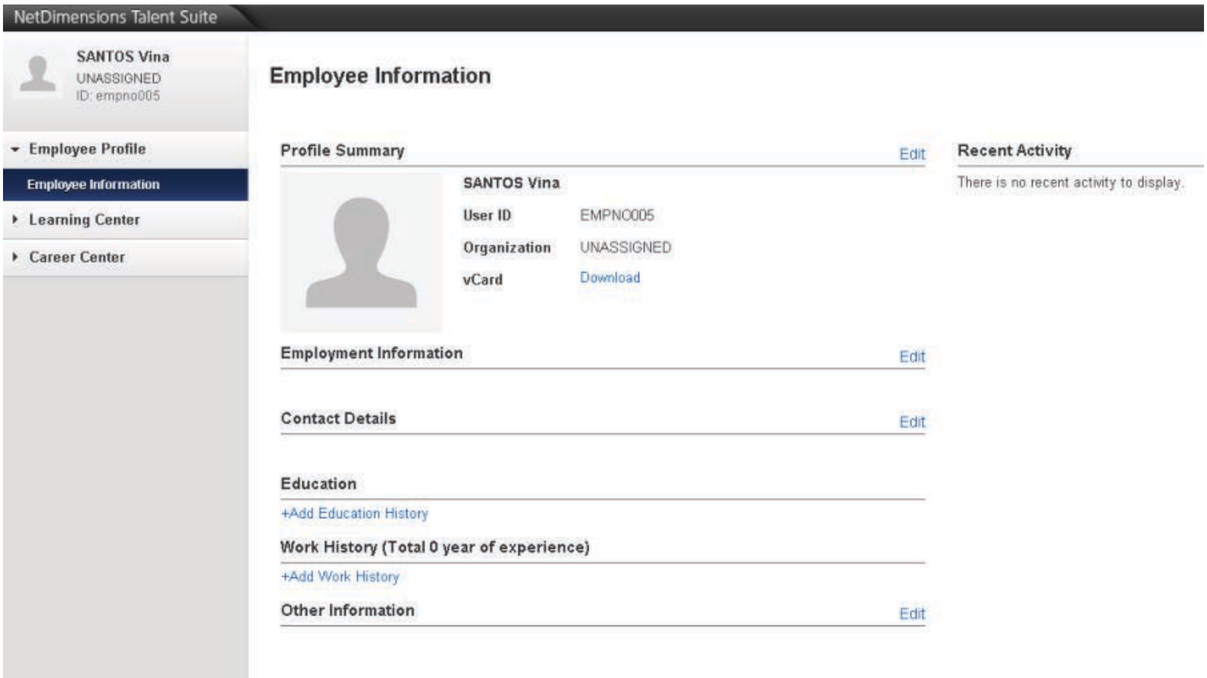
The Career Development Center is a consolidated view for learners and managers of all compliance, certification, and training plan related information. Functions included in the Career Development Center are:

- 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 **Employe e Profile** tab.

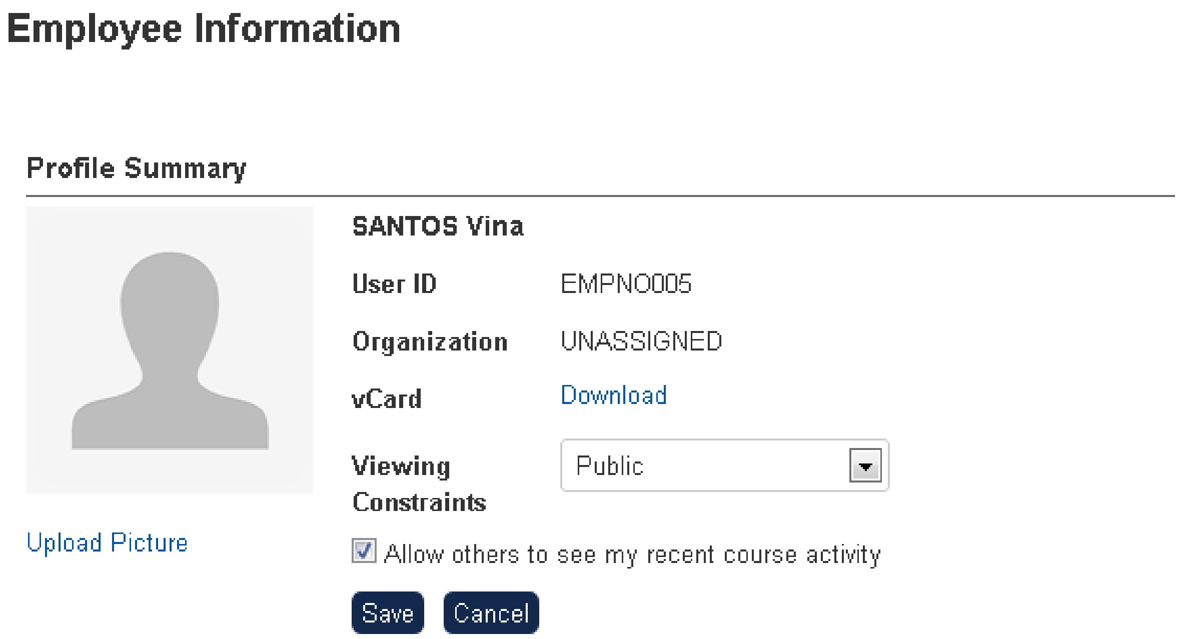


The Employee's Information is divided into six categories.

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:

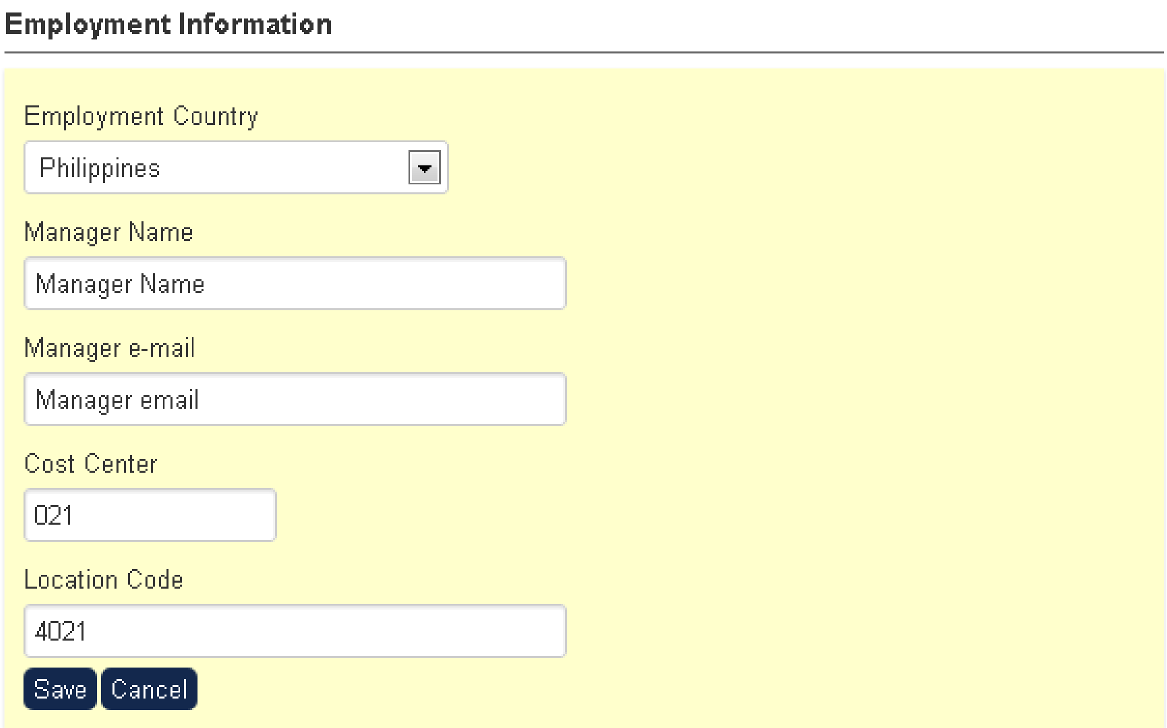
- download the employee's vcard
- upload employees picture, and
- configure the viewing constraints.



Employment Information

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

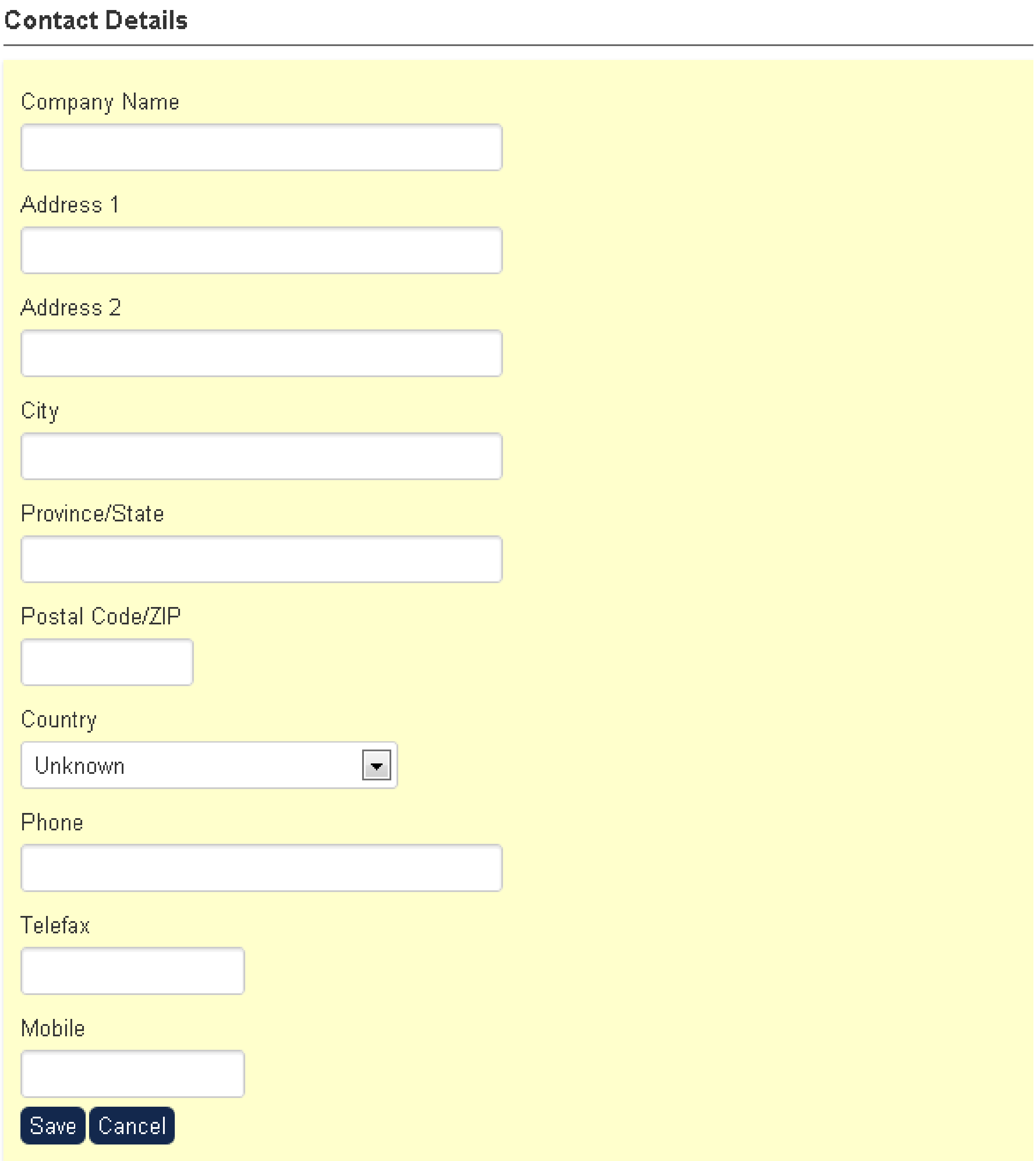
- Employment Country
- Manager's Name
- Manager's Email
- Cost Center
- Location Code



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

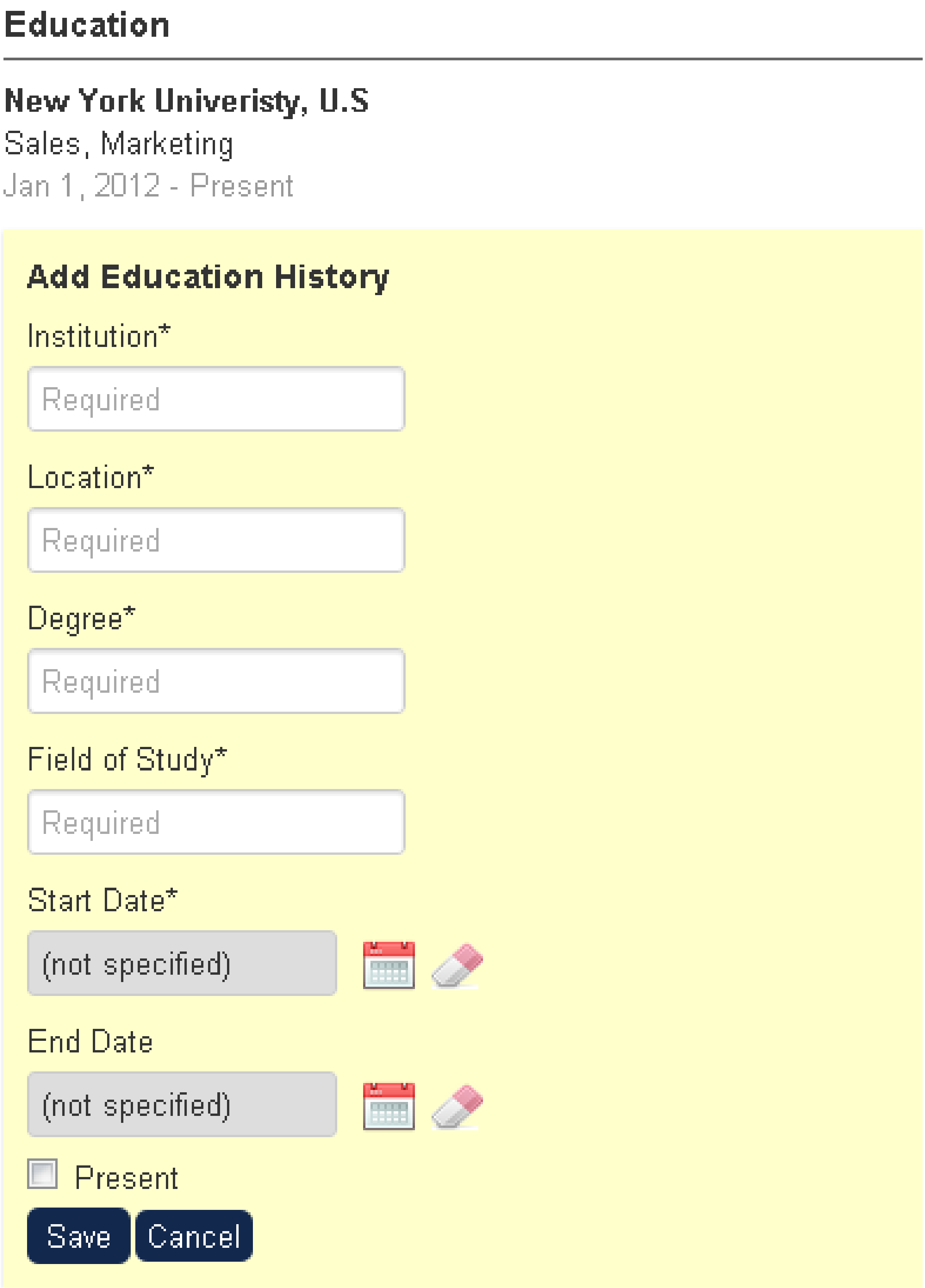


Education

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

This opens the menu for adding education history.



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

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

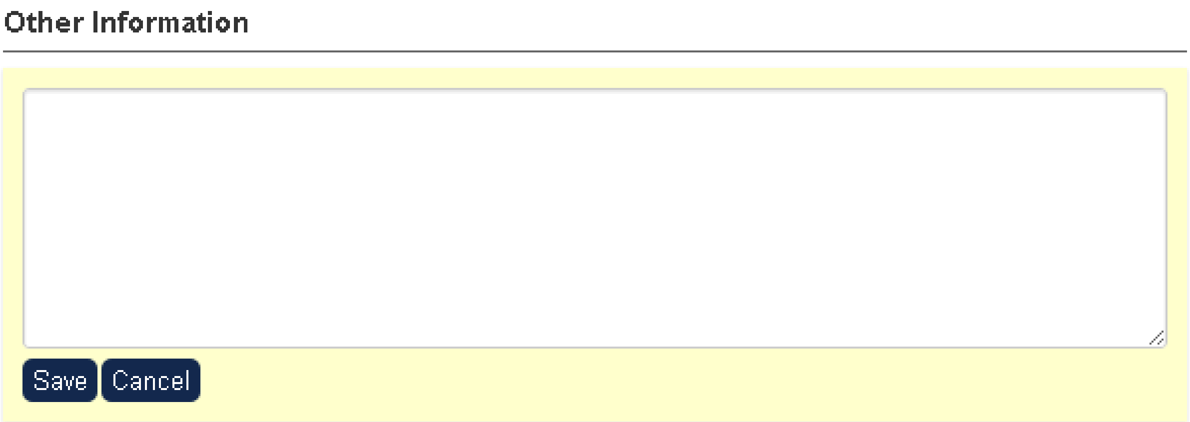
Employment Status*
Select

Key Achievements

Awards

Other Information

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



Learning Center

(Available for Performance, learning, and eLearning only)

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

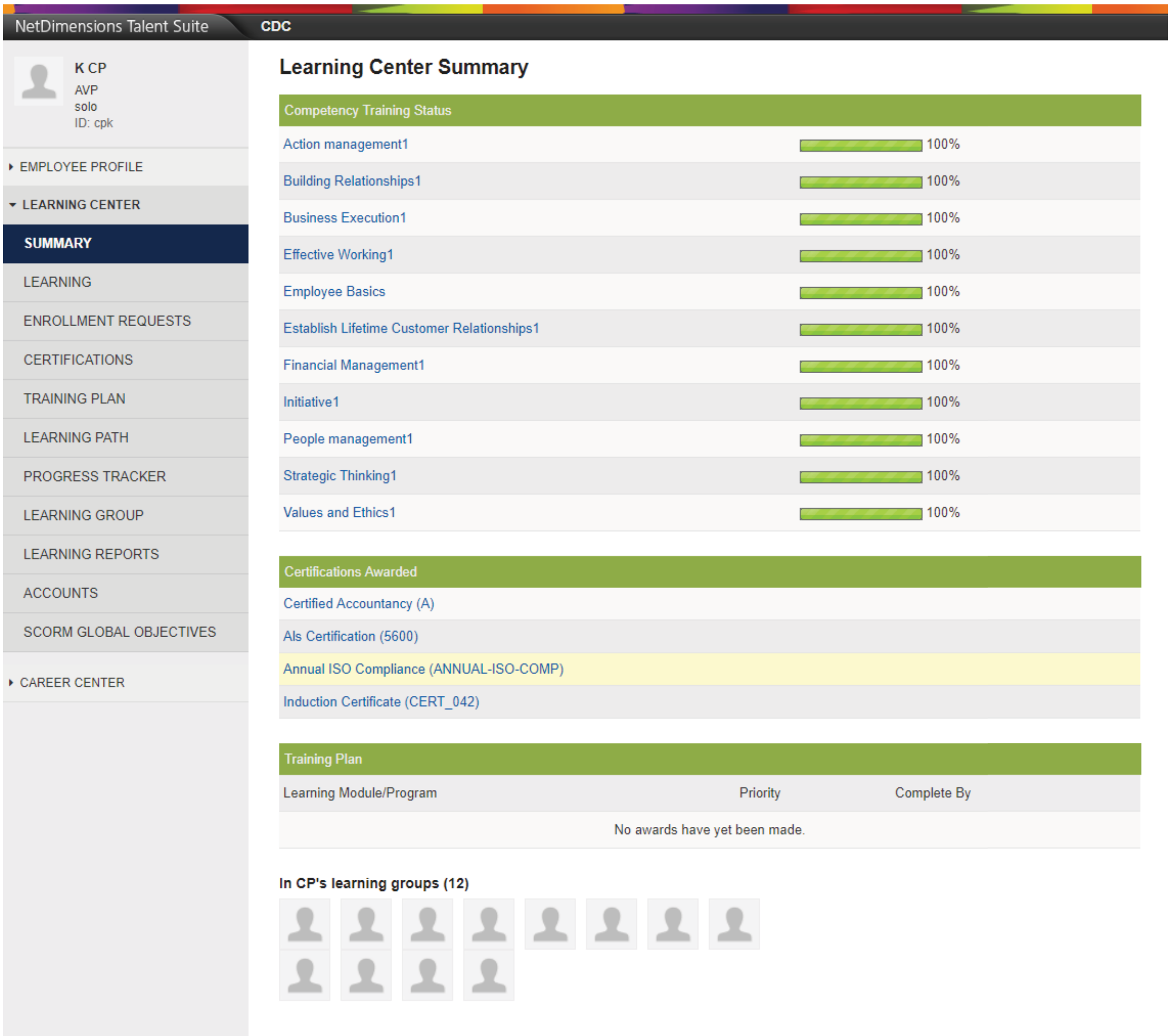
- Enrolled course
- Enrollment Request
- Records/Transcripts
- Certifications
- Training Plan
- Learning Group
- Learning Reports
- SCORM Global Objectives

Learning Center Summary

The Learning Center summary shows the following information:

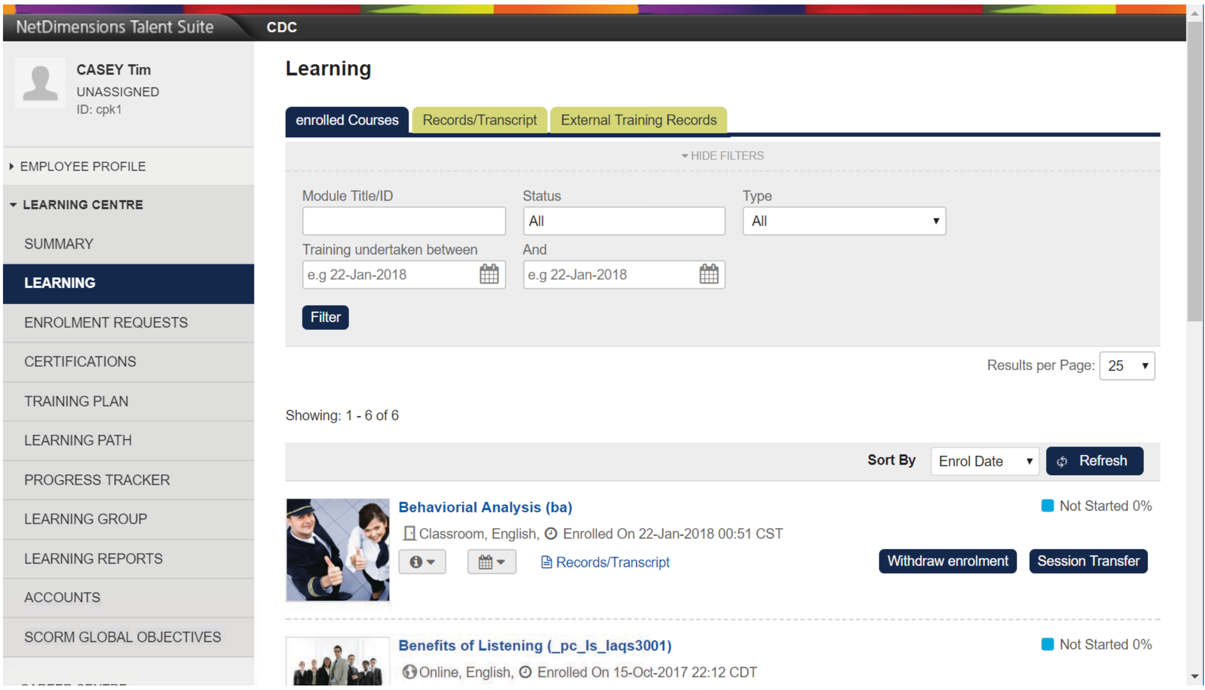
- Certifications awarded to the learner
- Training Plans
- Learning Groups

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



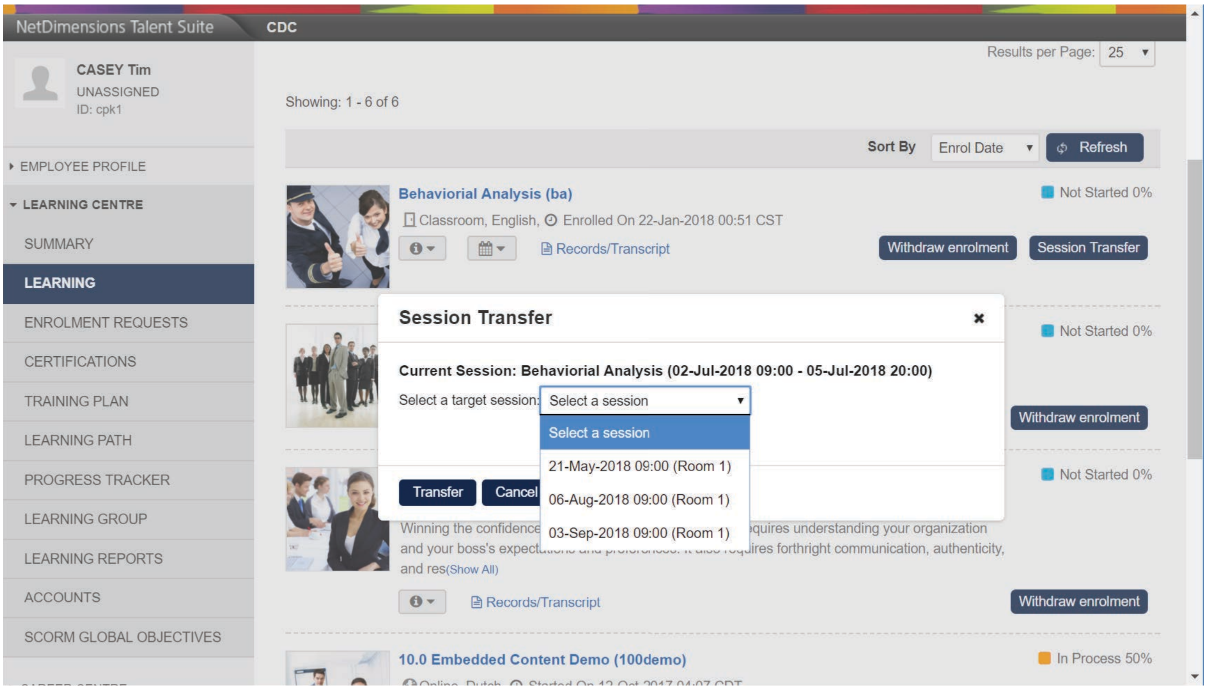
Enrolled Learning Modules

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



Session Transfer

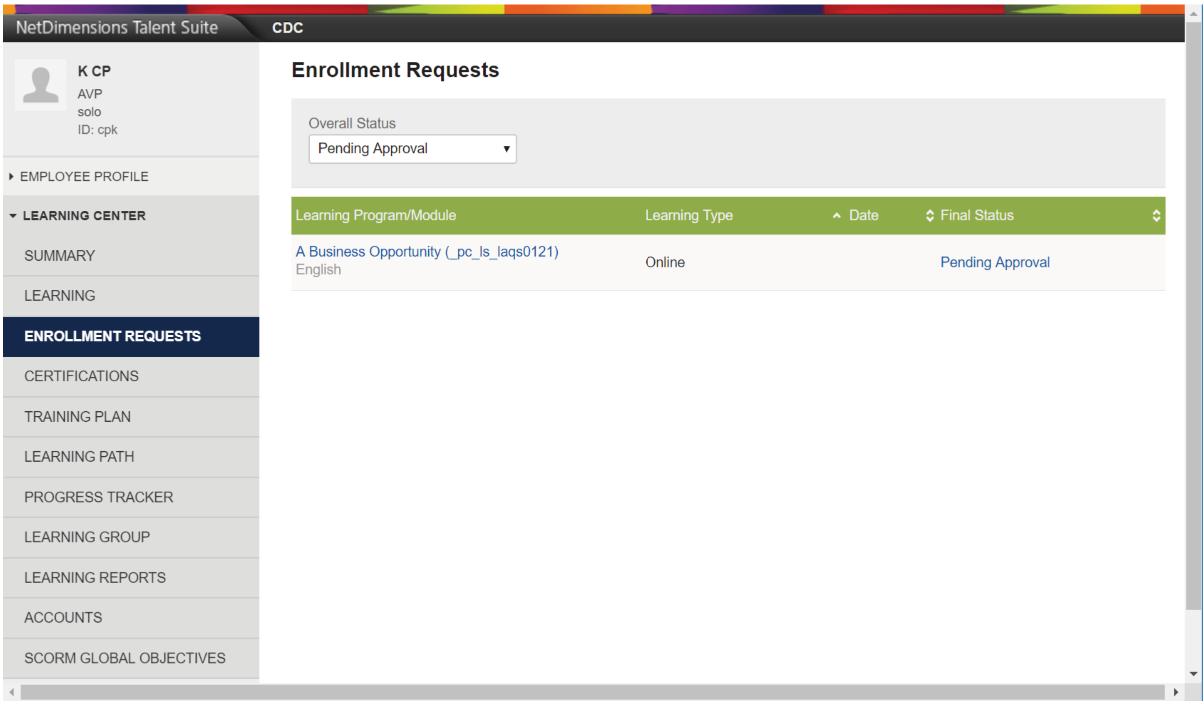
Reviewers can transfer the sessions in the active records of users to another one. To do so, click **Sessi on Transfer**, and then select the desired session to transfer to from the popup window.



Enrollment Requests

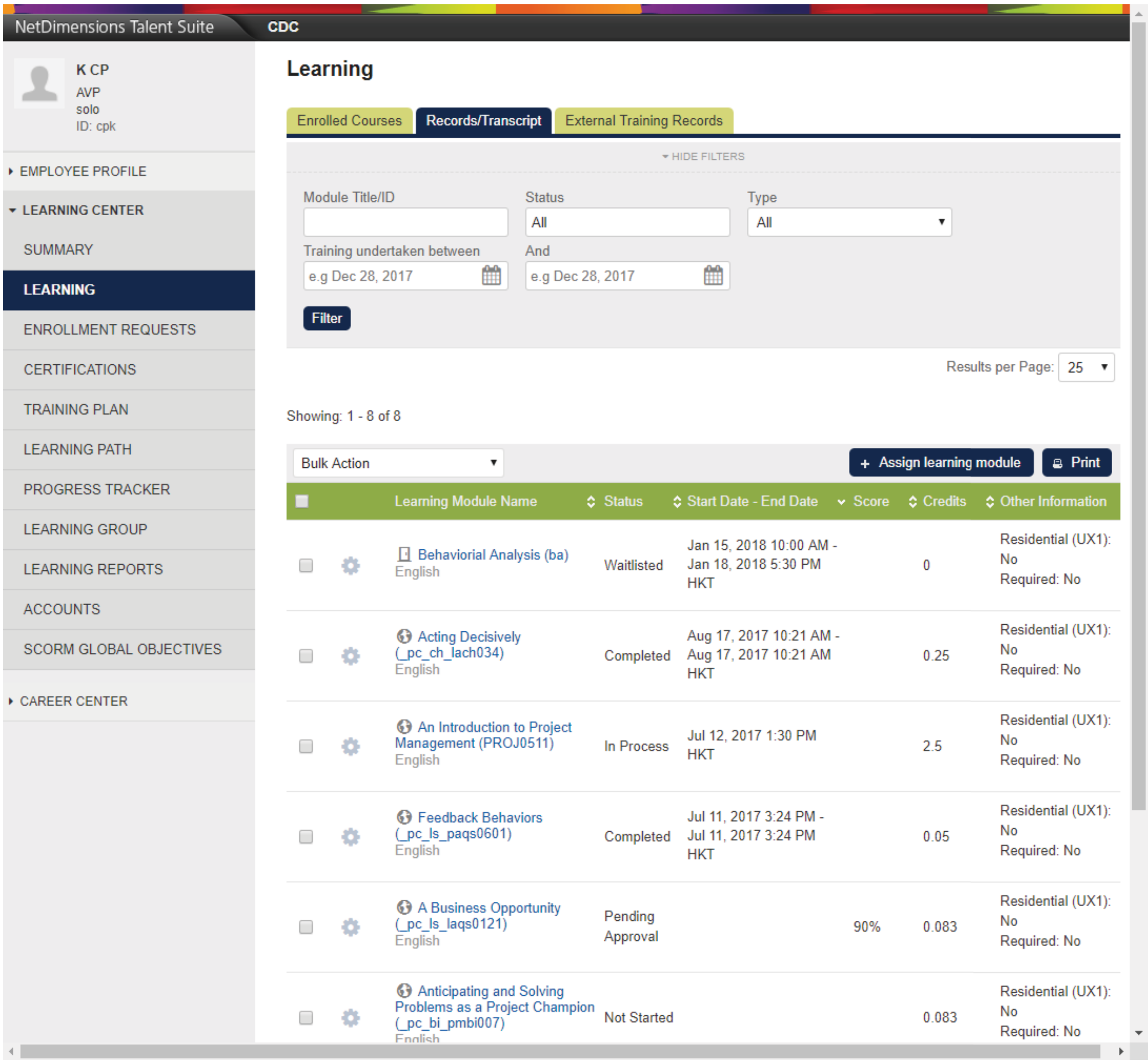
(Available for Performance and Learning only)

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



Records/Transcripts

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



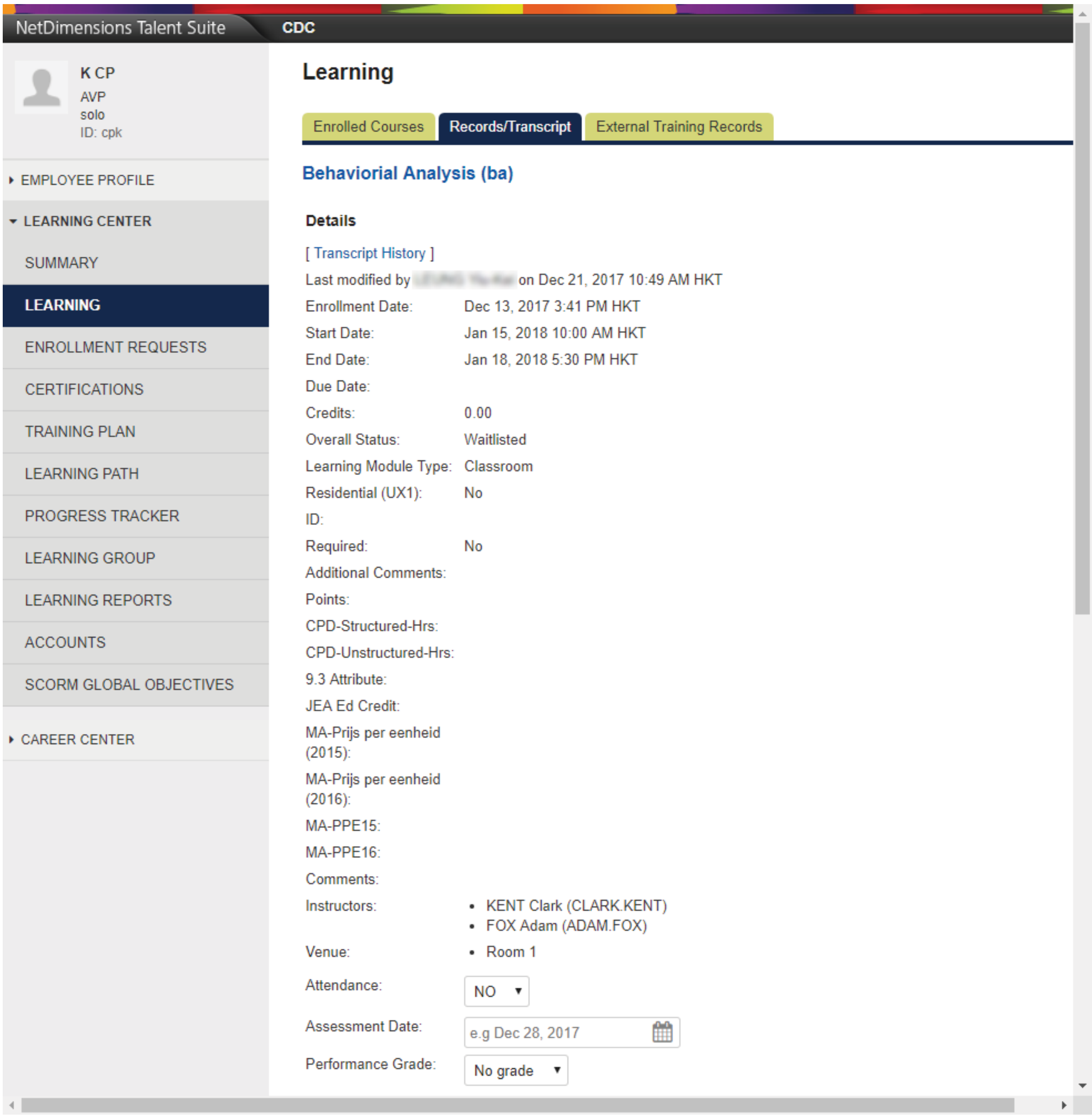
The screen lists all the currently enrolled learning programs/modules of the selected participant and it displays the start dates, enrollment information and results (score). From this screen you can:

- 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.

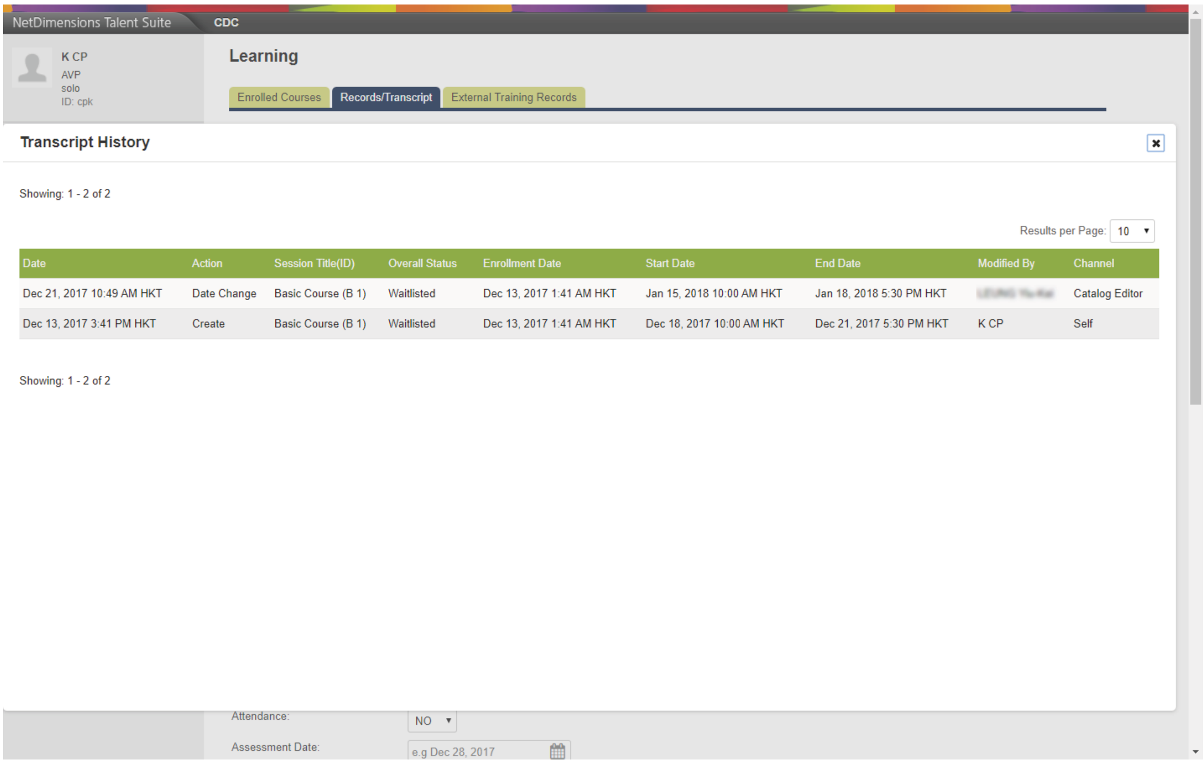
View Records/Transcript

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.



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



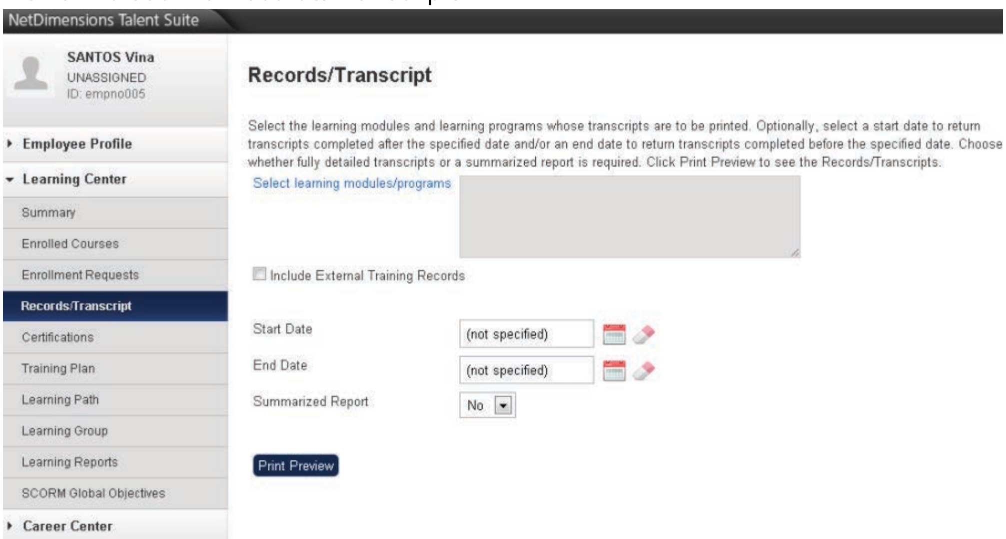
Note: To view **Transcript History**, **GENERAL SETTINGS** > **System Configuration** > **Records/Transcript** > **Enable Transcript History** must be checked.

4. Click **Save** / **Print**.

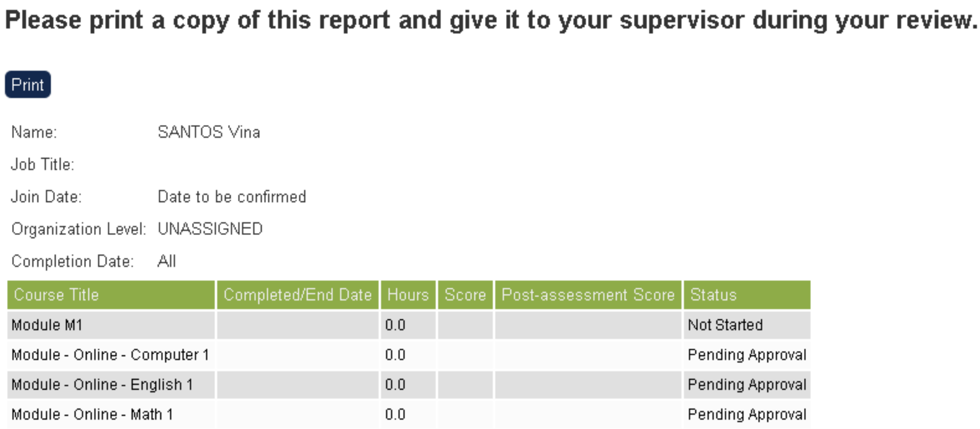
Print Records/Transcripts Report

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.



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

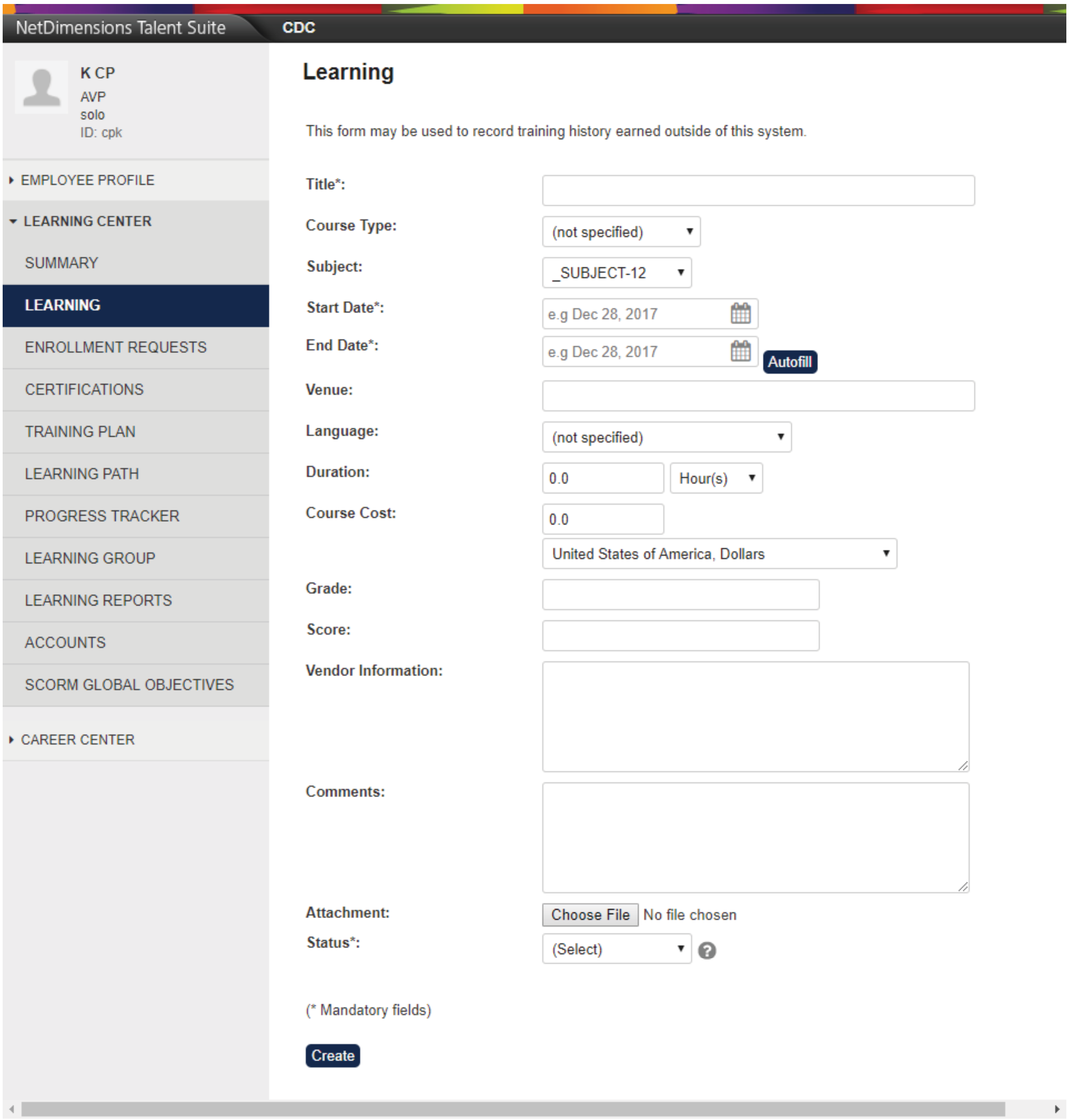
Name:	SANTOS Vina
Job Title:	
Join Date:	Date to be confirmed
Organization Level:	UNASSIGNED
Completion Date:	All

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

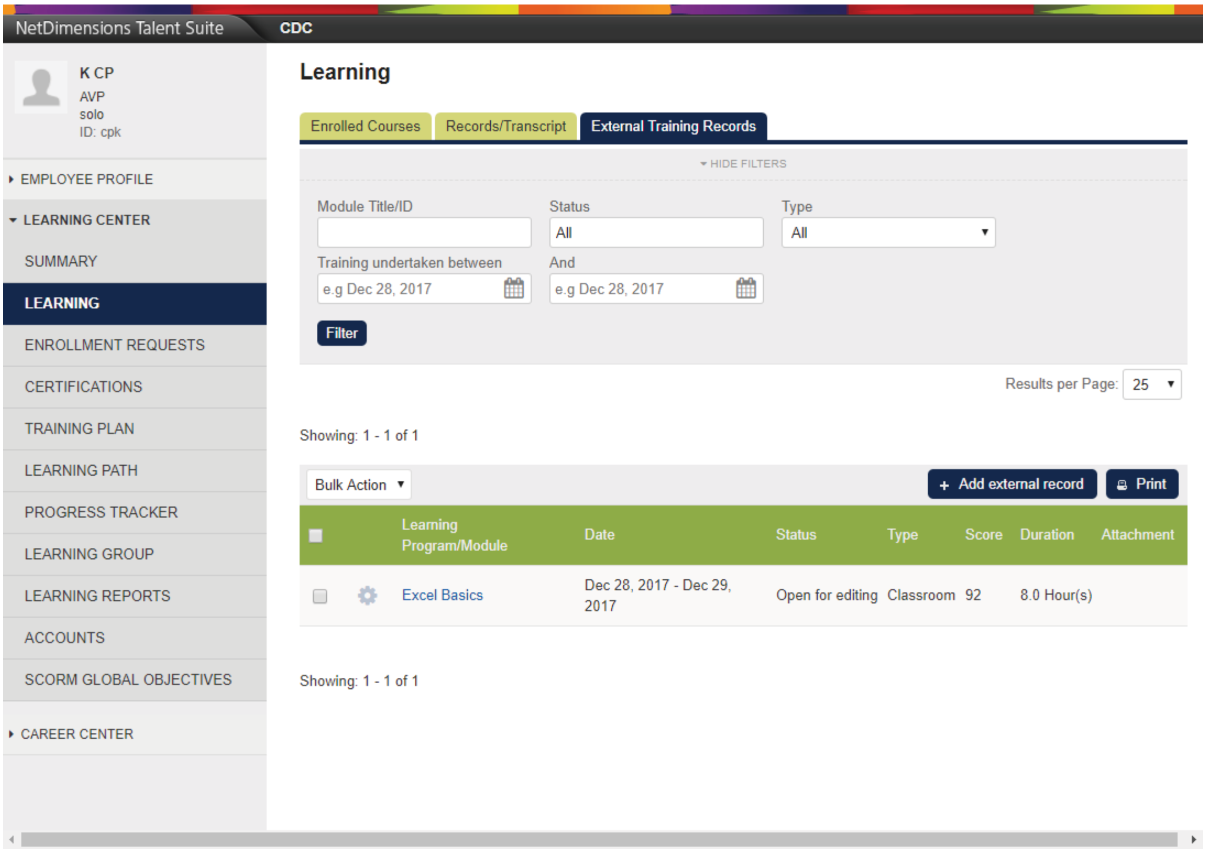
4. Click the **Print** button to print the report.

Adding External Record

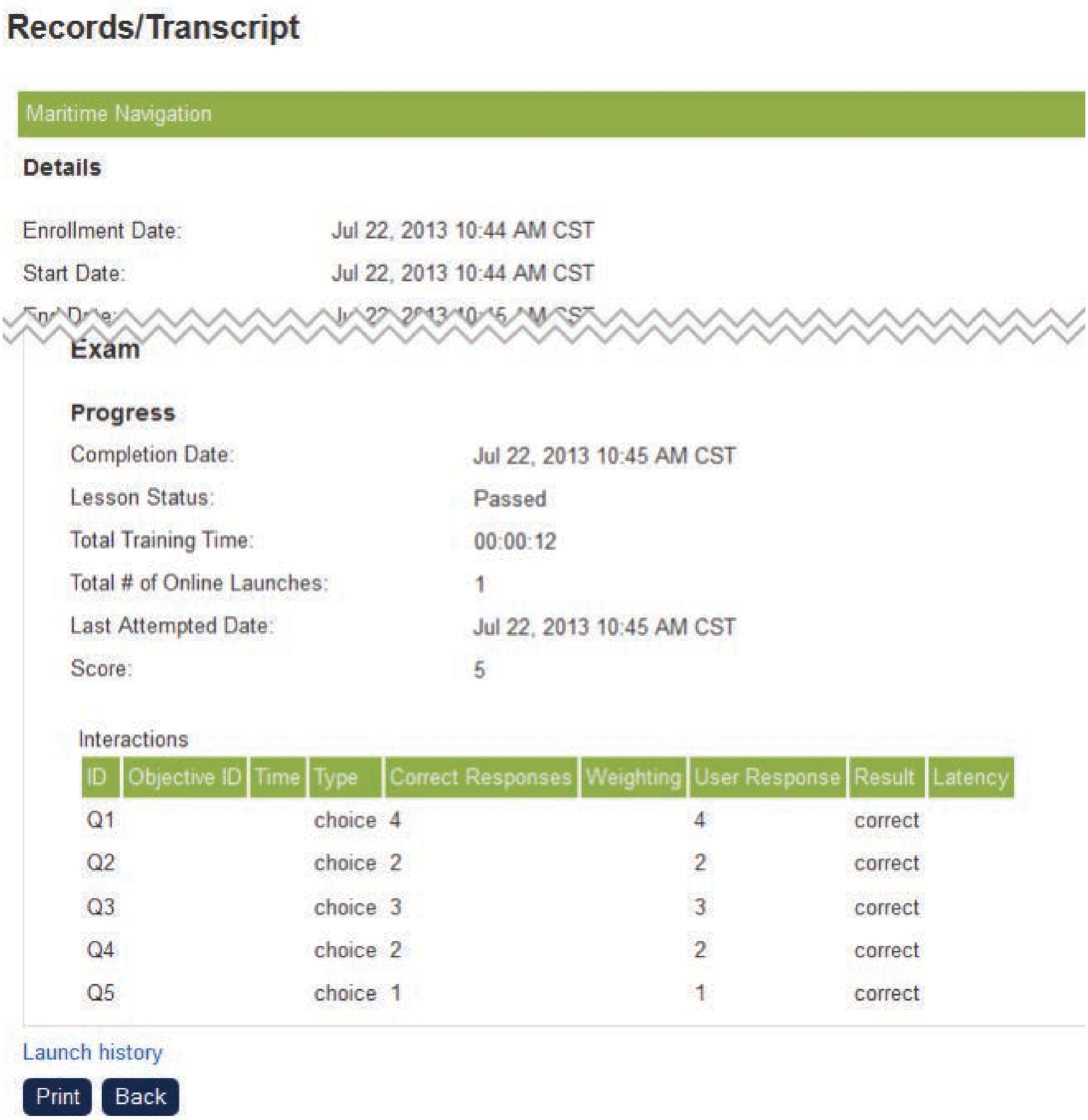
1. On **Career Development Center**, go to **LEARNING CENTER** > **Learning** > **External Training Records** Tab, click **+ Add external record**.
2. Input the necessary attributes.
3. Click **Create**.



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



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	

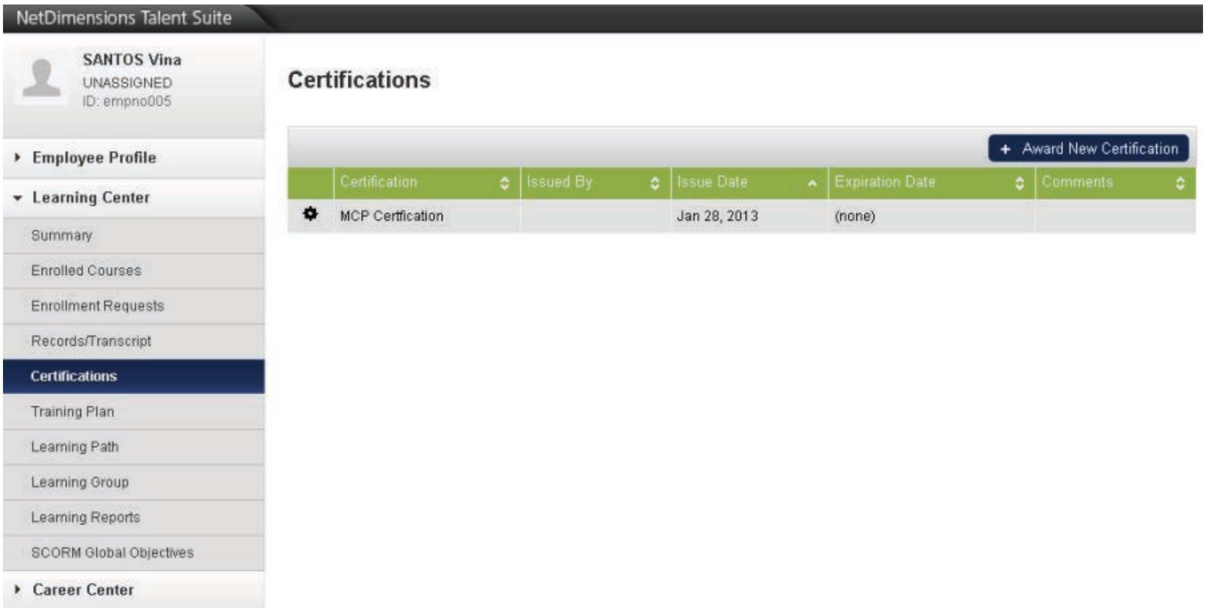
Launch history

Print Back

View Certifications

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

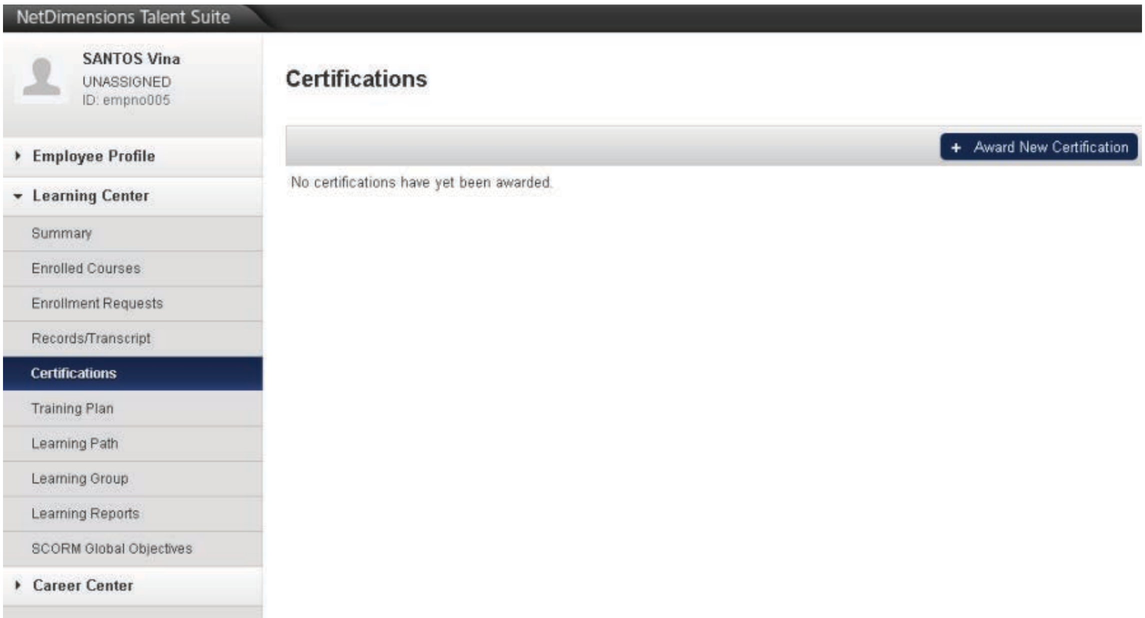
To view Certifications: On the **Career Development Center** menu, click the **Learning Center > Certifi cations**. The list of certifications will be displayed on the screen.



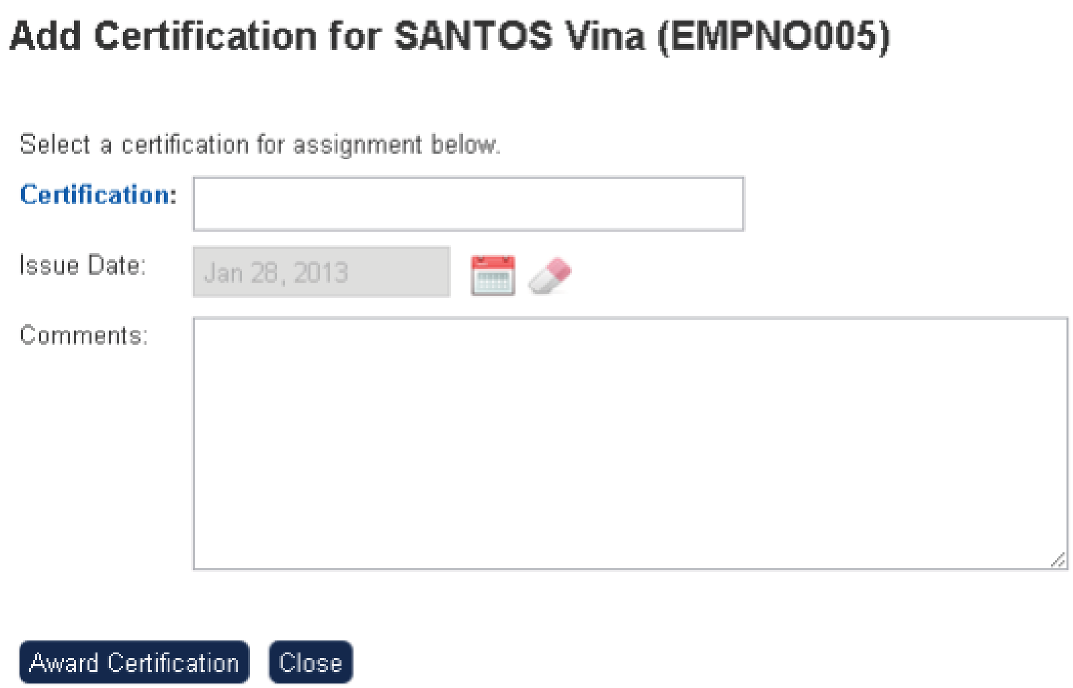
Awarding a New Certification

To award a new certification:

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



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



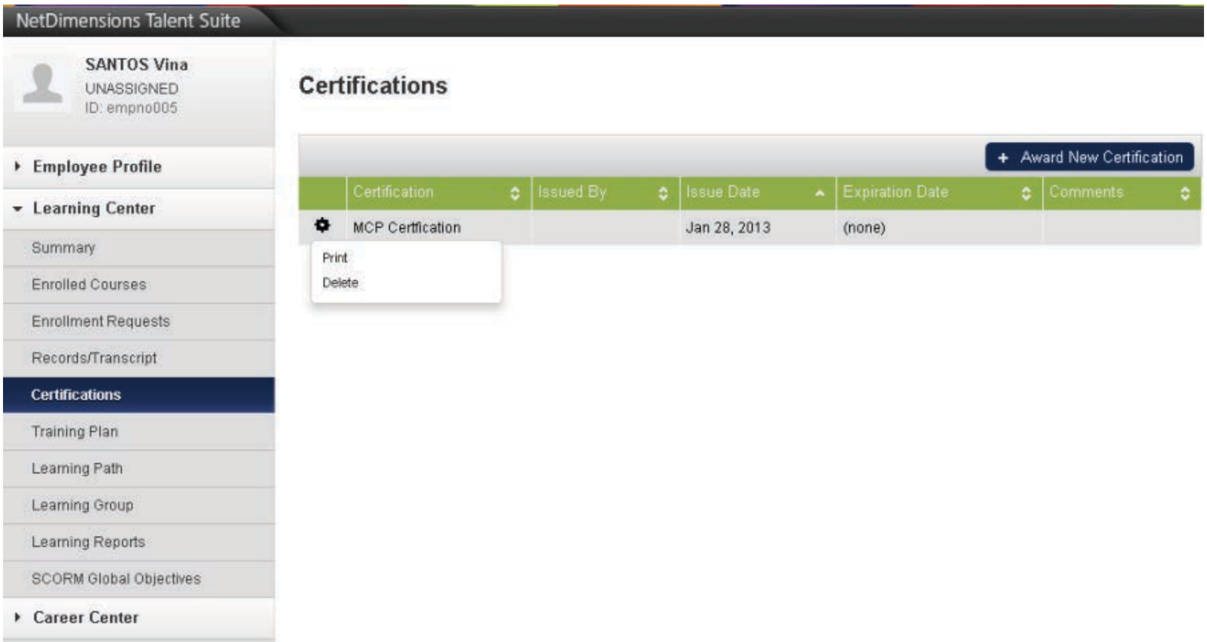
3. Click Award Certification.

Viewing Certification

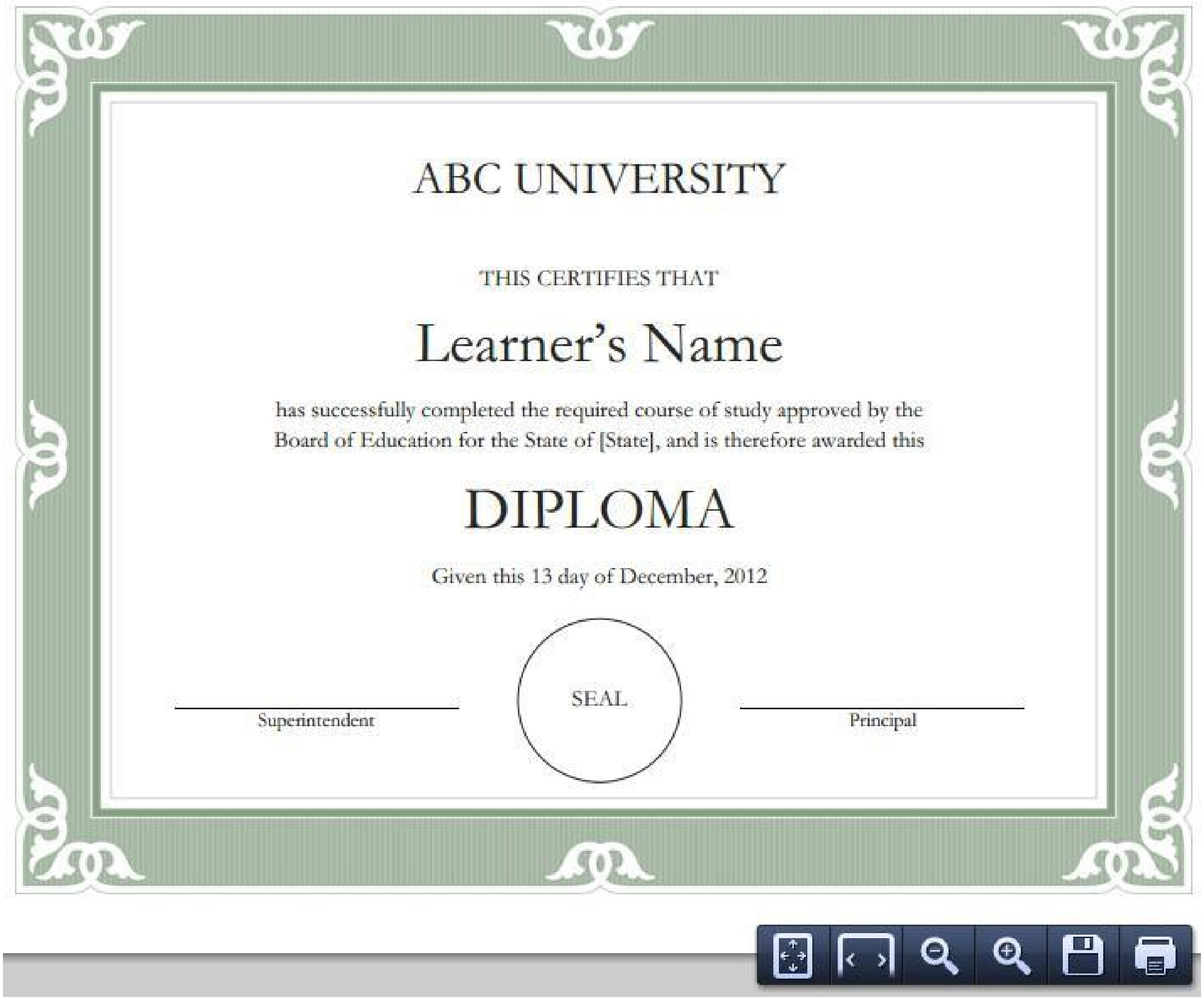
To view certification, go to **Career Development Center > Learning Center > Certifications.** Here users can view the current and expired certificates.

Printing the Certificate

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

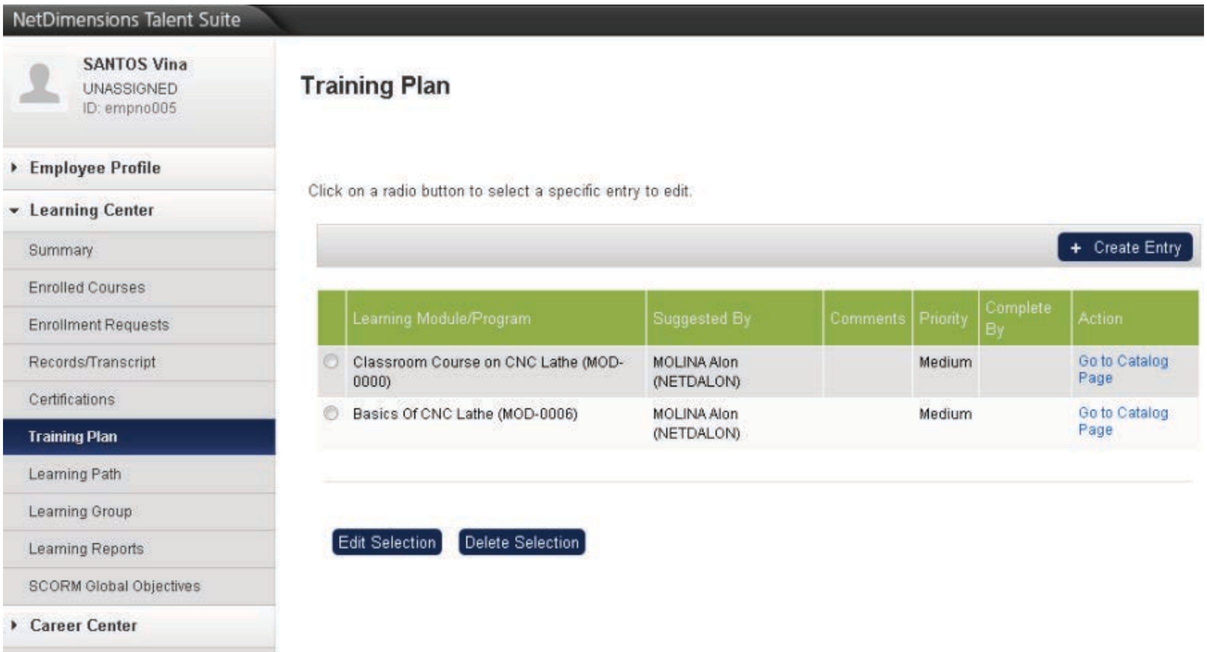


The actual *Certification* is displayed on the screen. Click the **Print** button to generate a print copy or hard copy of the certification.



Training Plan

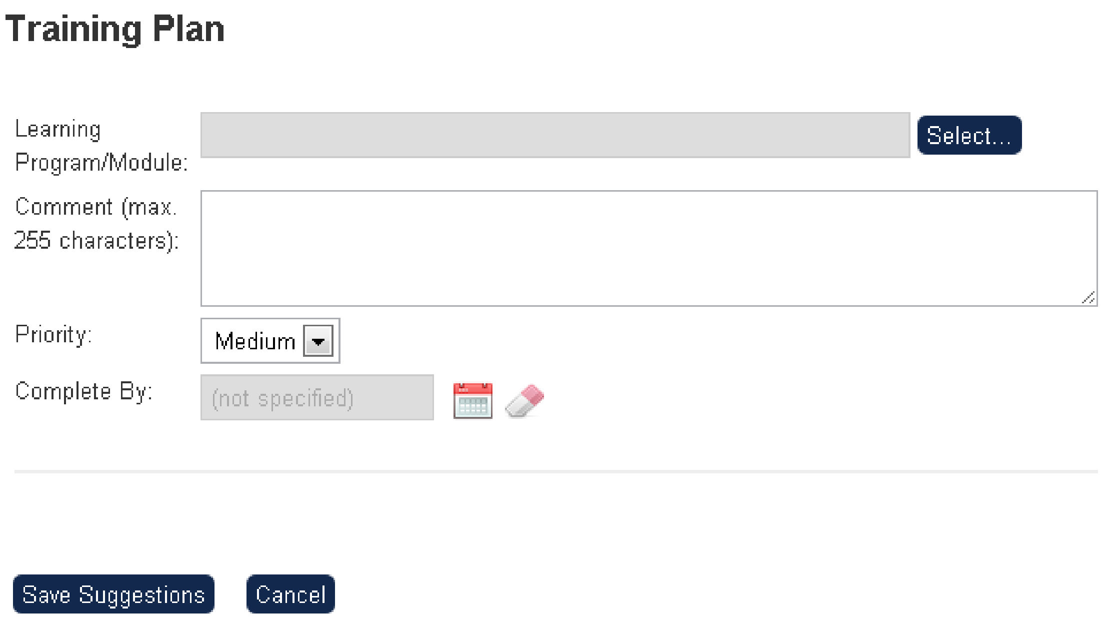
A training plan consists of recommendations prepared by a manager or appraiser. To view training plan s go to the **Career Development Center** menu, click the **Learning Center > Training Plan**. A list of learning modules/programs appears.



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.



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

Learning Path

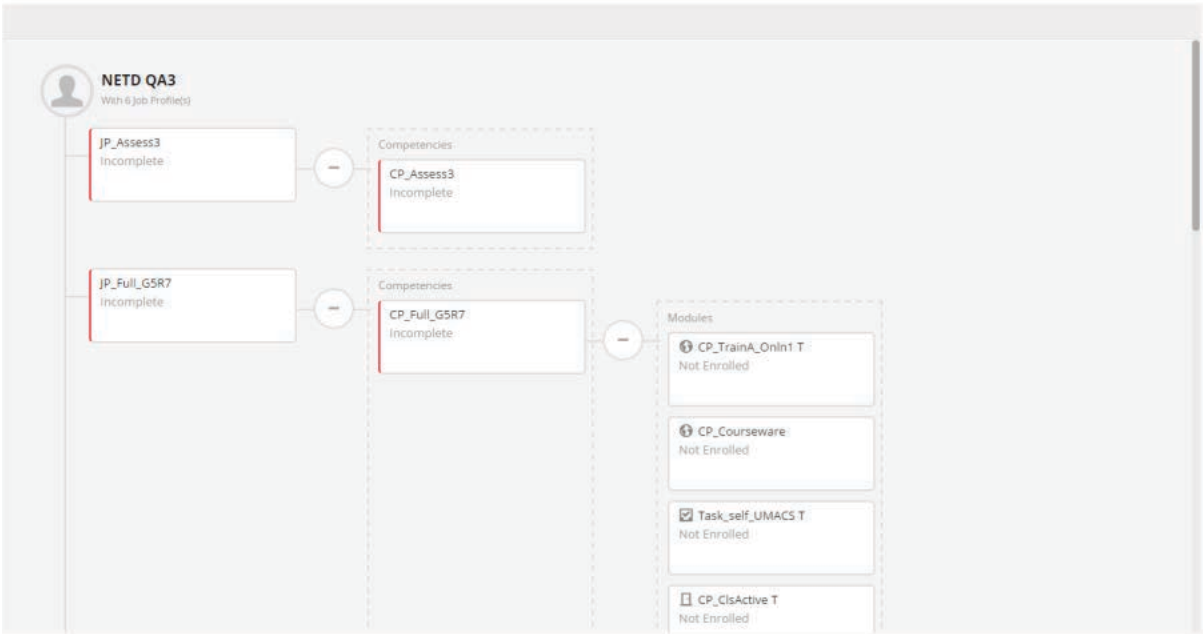
The Learning Path UI is designed to display status information with clarity, with detailed information being accessible via drilling down on a particular item, with individual items being expandable, collapsible or draggable depending on the space needed to present said information.

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).

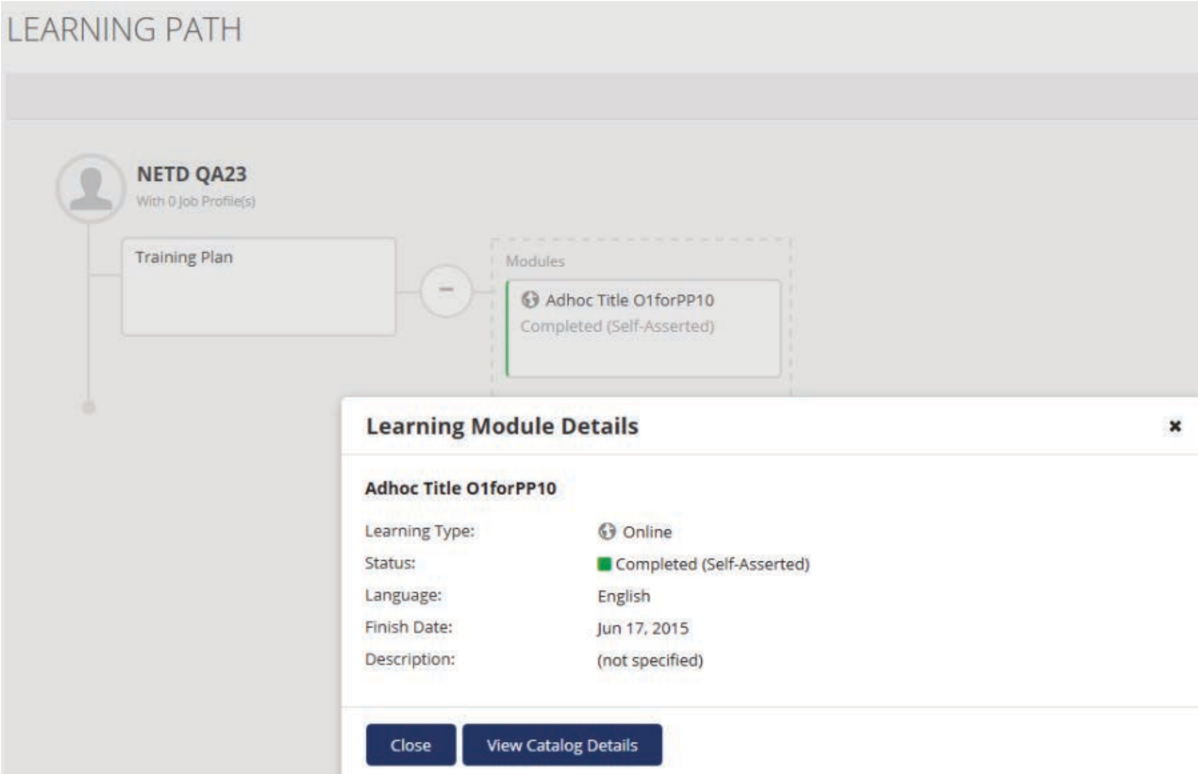
There is a plus or minus icon to expand or collapse on an item showing sub-items belonging to the hierarchy with a surrounding dotted box to clearly convey the concise partitioning of the particular hierarchical relationships. This is graphically intuitive when it comes to complex structure display of 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.

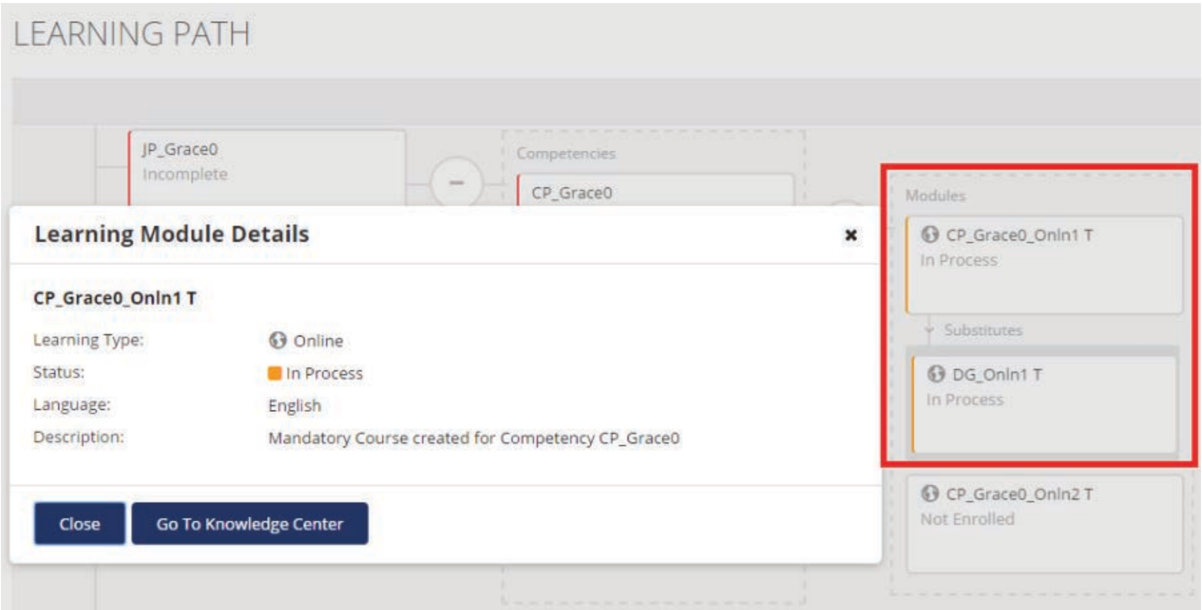
LEARNING PATH



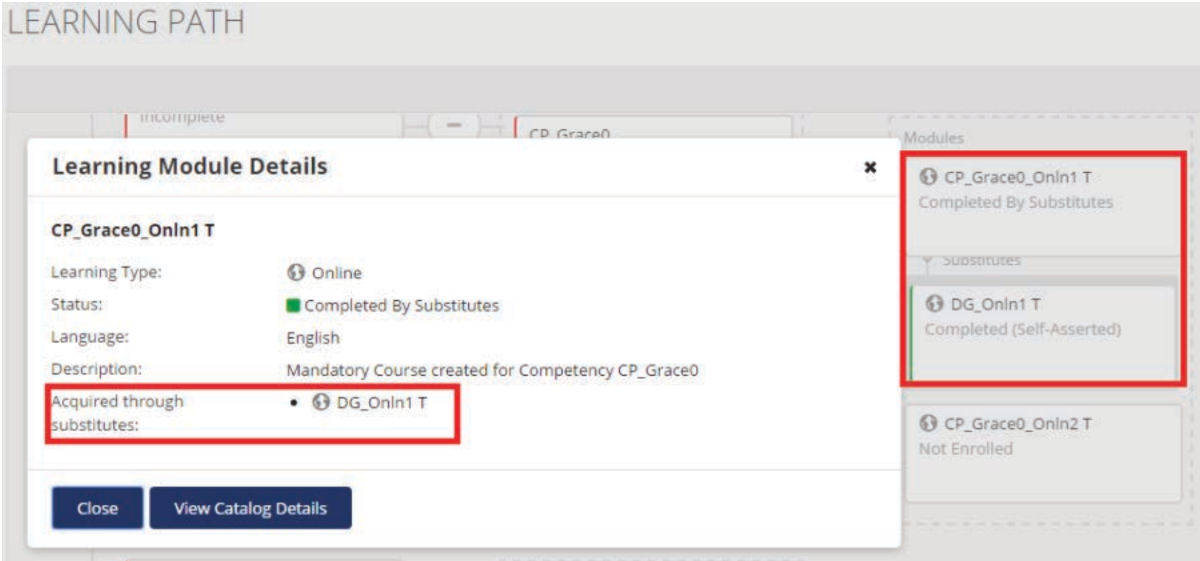
Mouse over on a particular item card will pop up a Details button for the user to drill down the detailed information on that item. There is an overlay popup to display the summarized information of the item with the appropriate redirect button to view the details page of that item like to go to the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



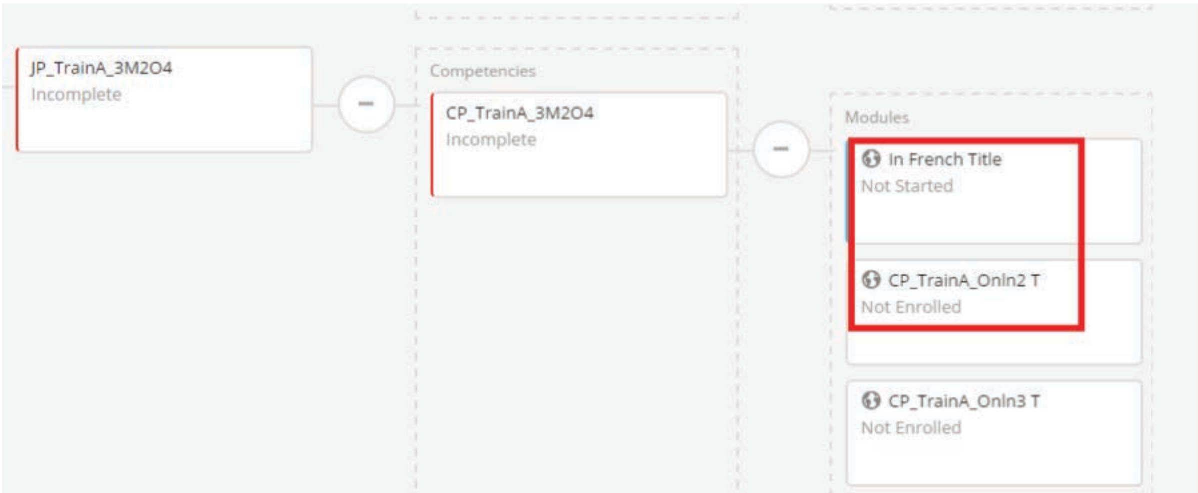
Or go to the Knowledge Center if the transcript is still in an active state.



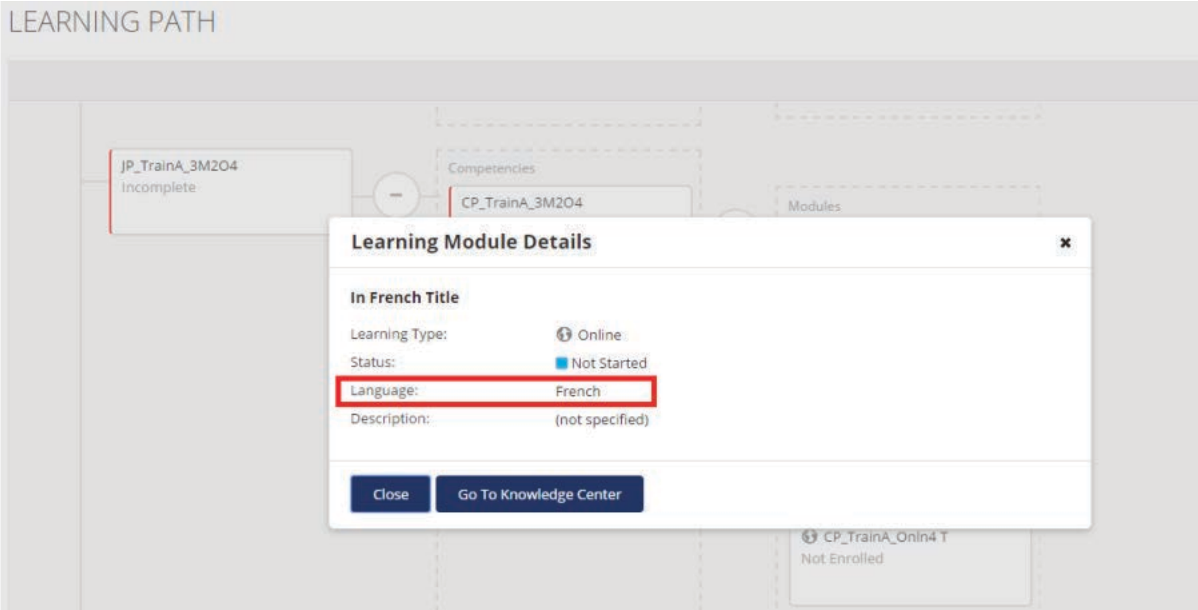
The summarized popup information includes showing the substitute information of a target module.



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.

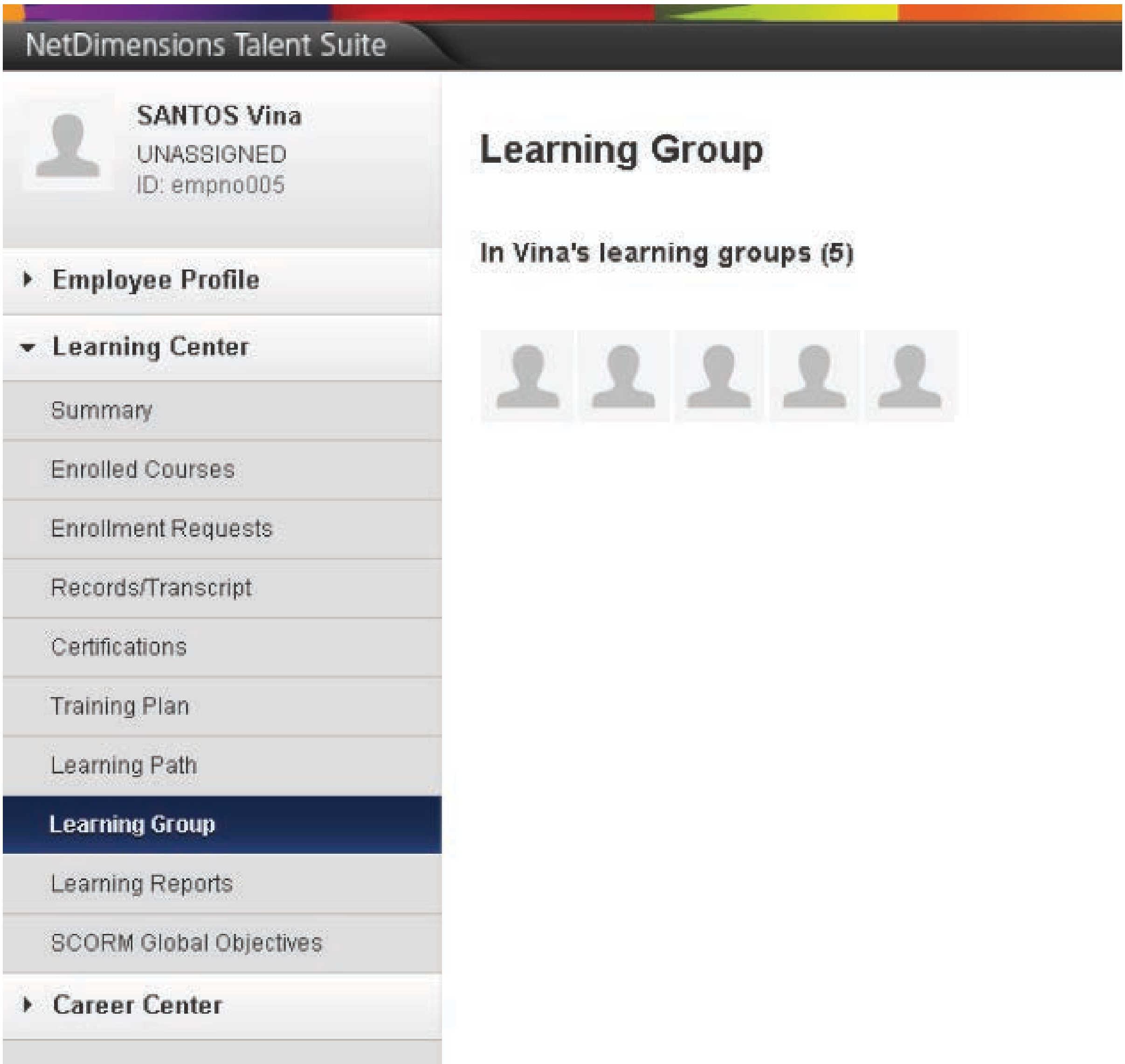


A new Language indicator is also shown to denote the language that the user has taken this course in.



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.

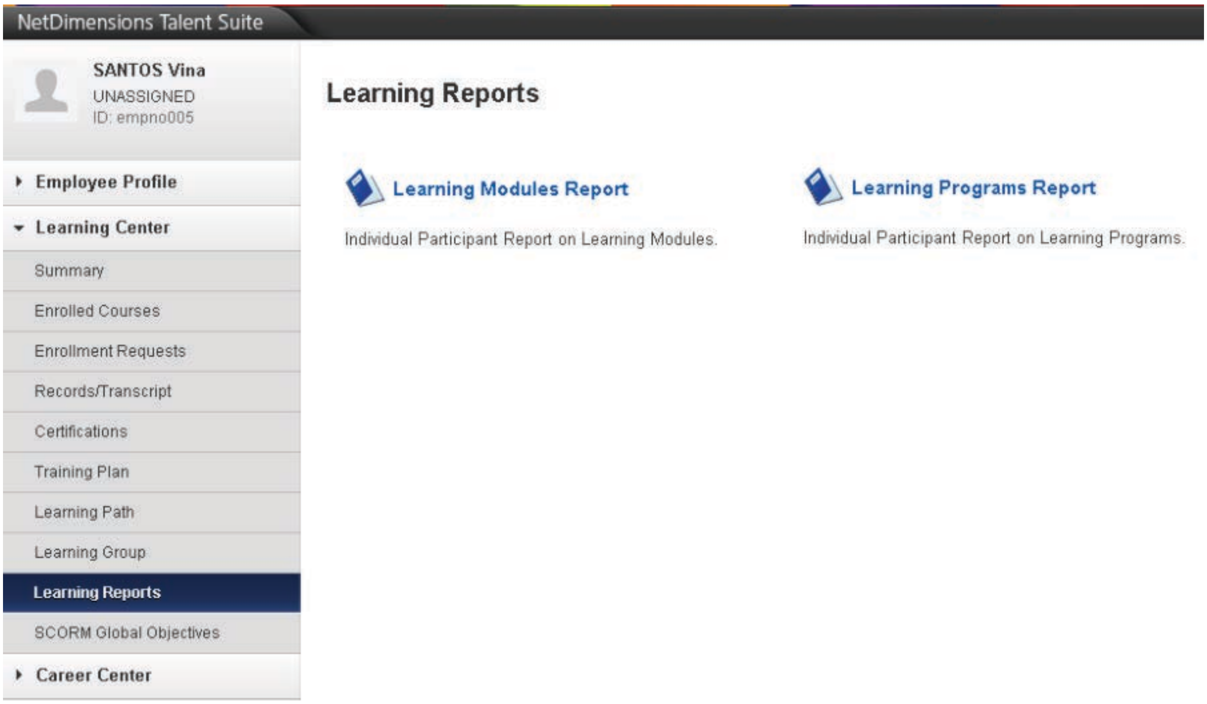


View Learning Reports

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

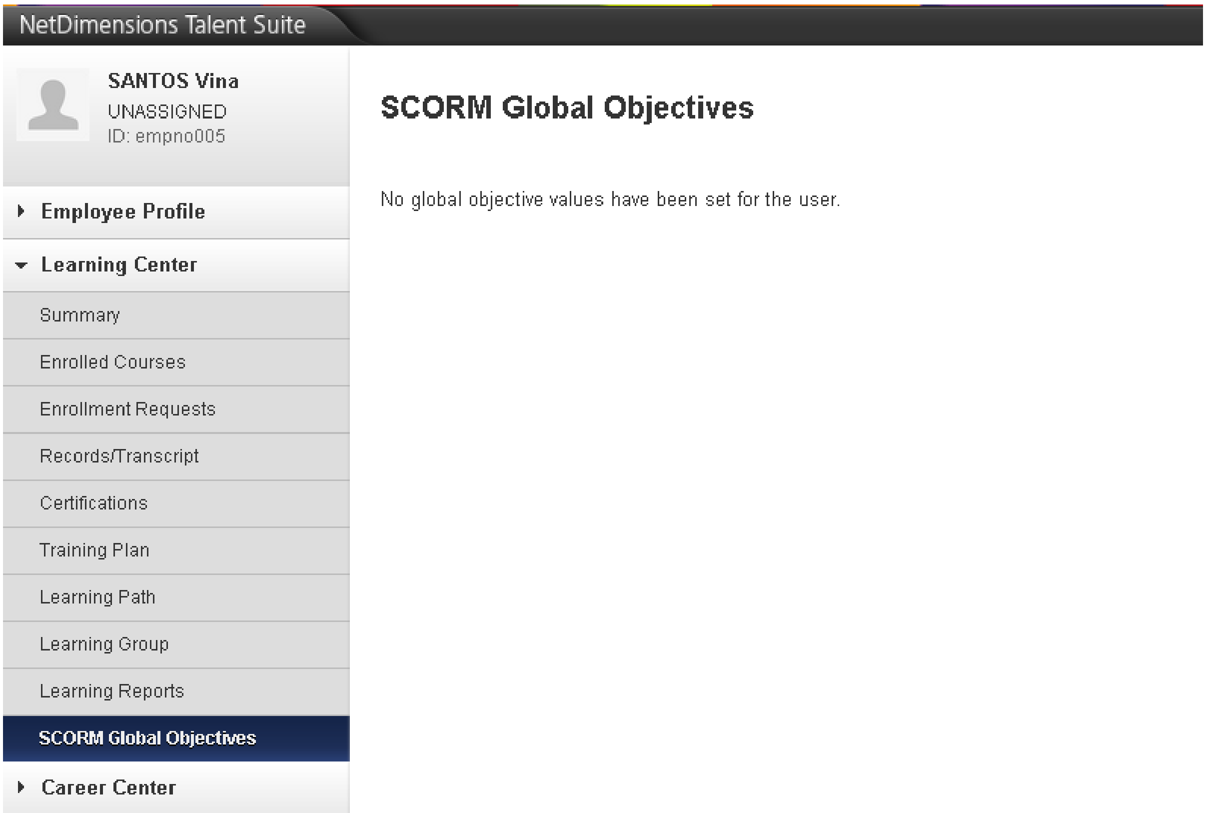
- Learning Modules Report
- Learning Programs Report To view learning reports:

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.



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 C enter when reviewing a learner.



Employee's Career Center

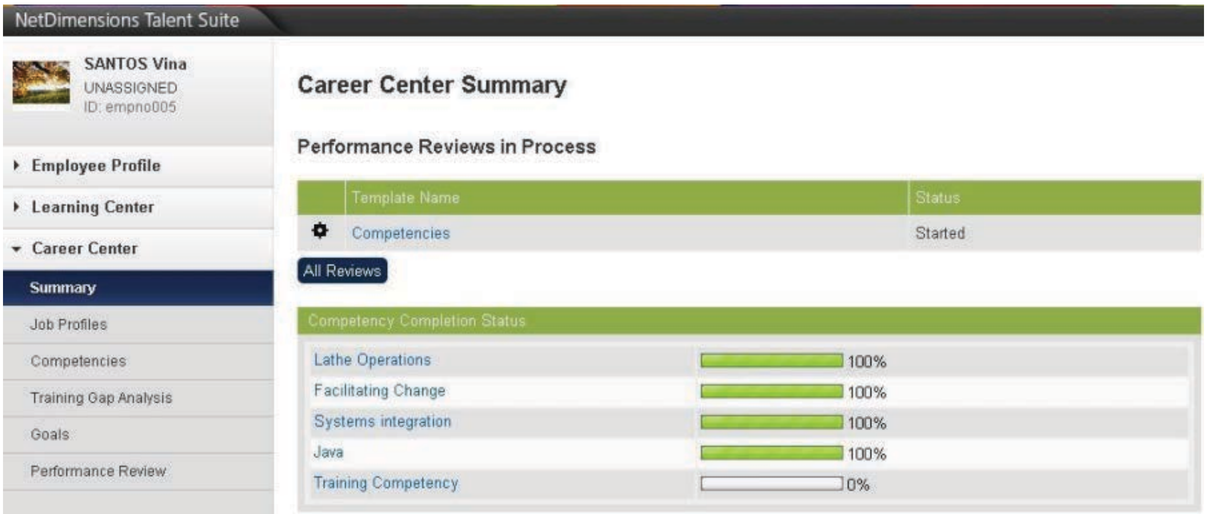
(Available for Performance and Learning only)

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

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

Career Center Summary

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

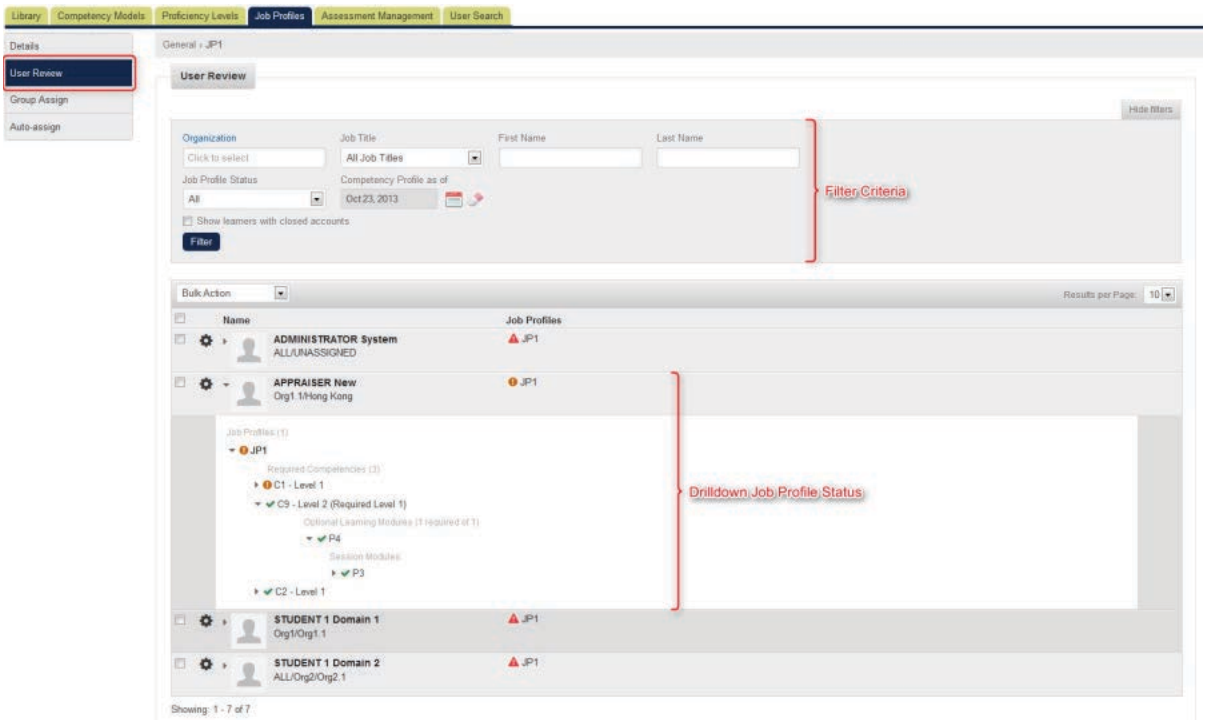


Job Profiles

A Job Profile is a collection of competencies that describe a learner's overall training needs, based on t he expected knowledge requirements of particular jobs. These profiles are usually directly assigned by a manager or administrator. Learners can have multiple job profiles.

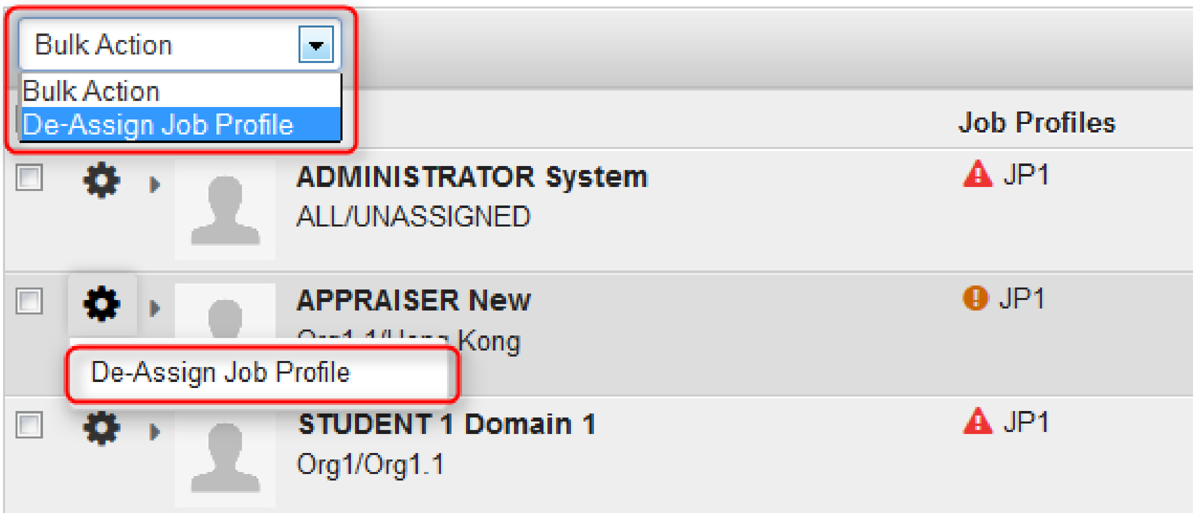
User Review in Job Profiles

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 User Review page in the Job Profile Editor

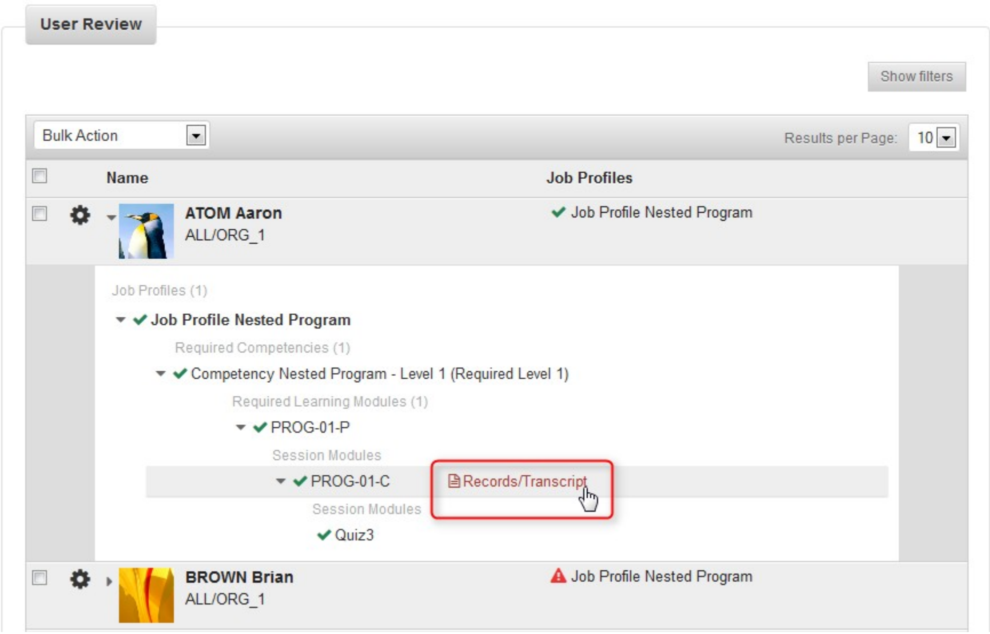
The de-assignment of Job Profiles can also be done in the User Review page. Both bulk de- assignme nt and individual de-assignment are available in the User Review page.



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.



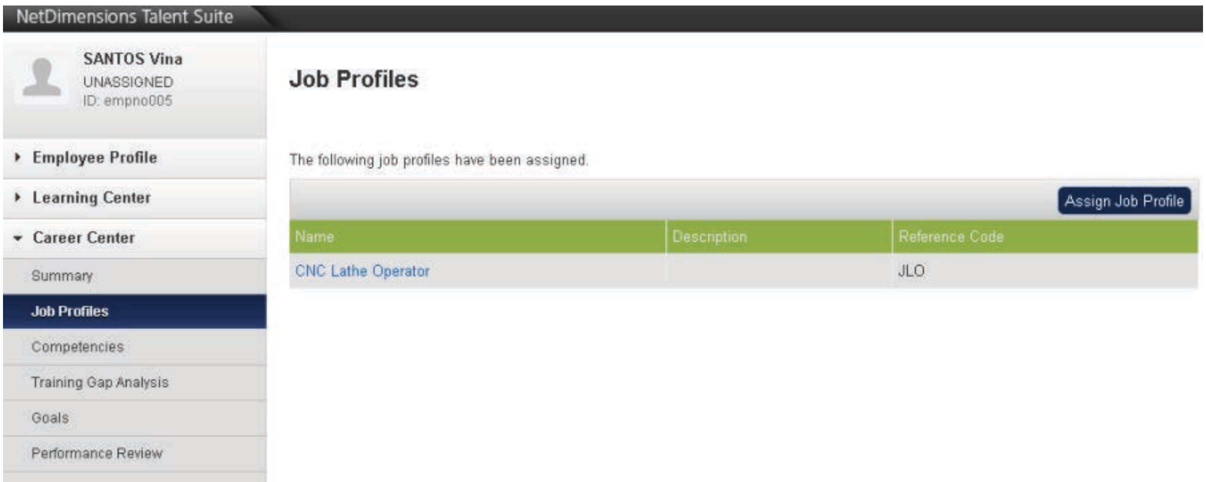
Records/Transcript link is displayed on mouse hover/click on modules.

Note:

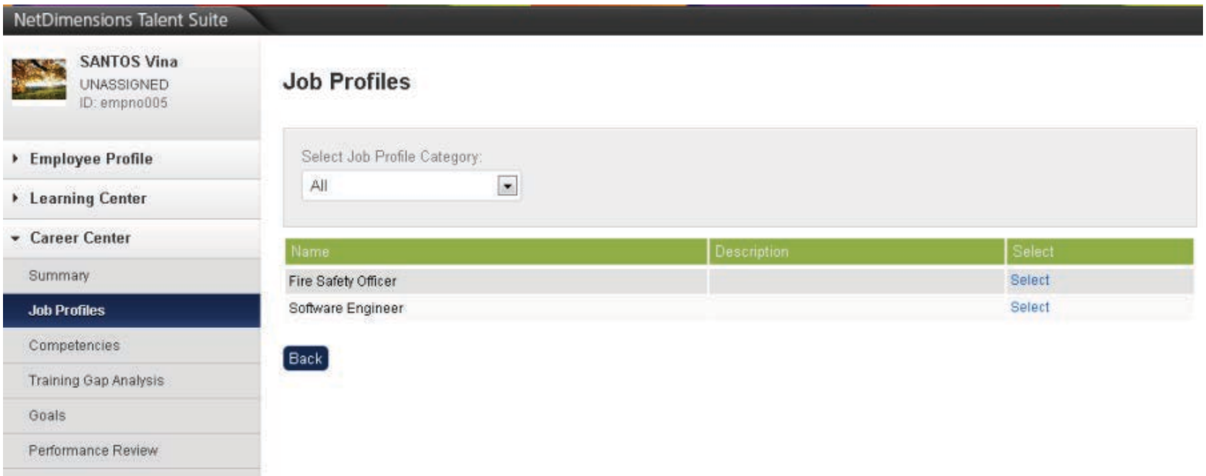
1. Transcript link is not available for past dates.
2. Whan a learner has enrolled on a module multiple times, the system will always display the latest transcript contributing to the Job Profile.
3. Job Profile administrators with Access Control ***"Display Details, Progress, and Course Interac tions 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.

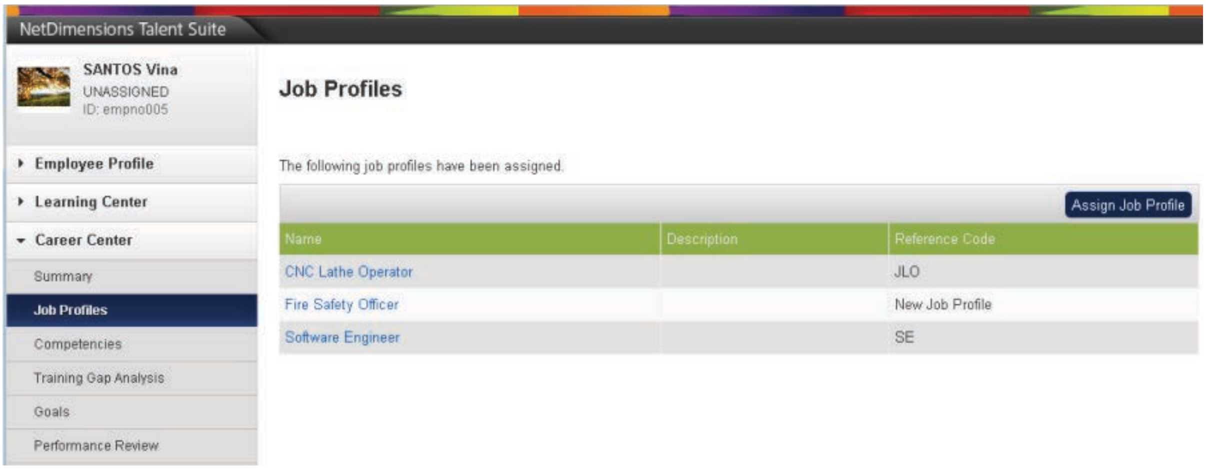


The menu displays the available job profiles. Click the **Select** link of the job profile you want to assigned.

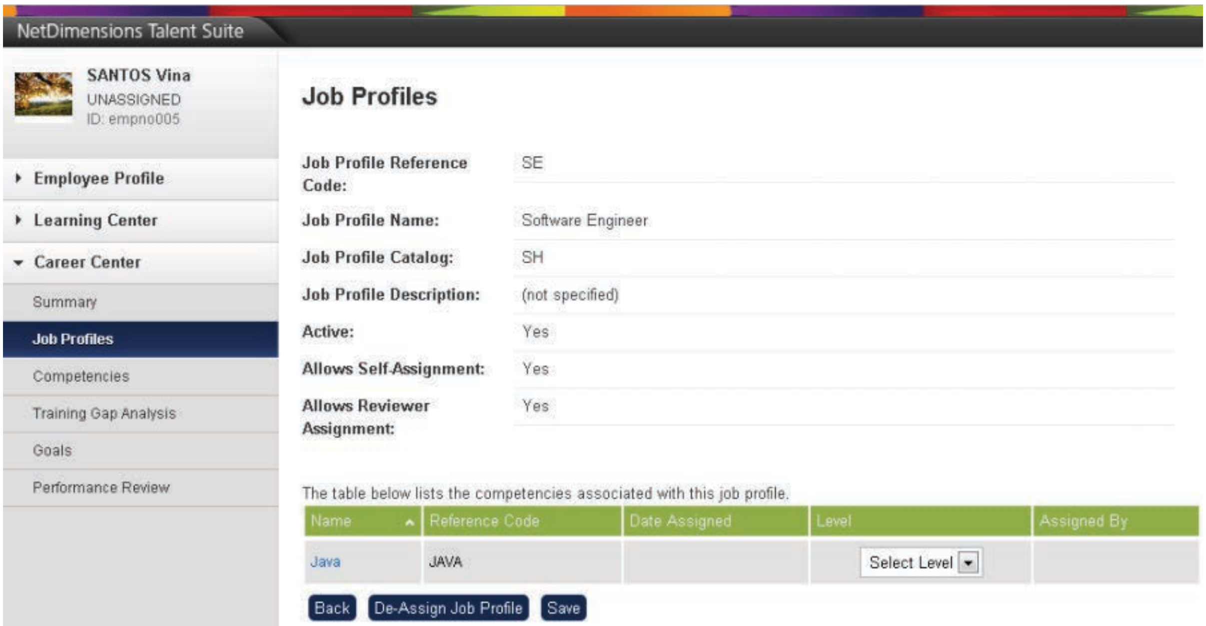


Updating the Proficiency Level

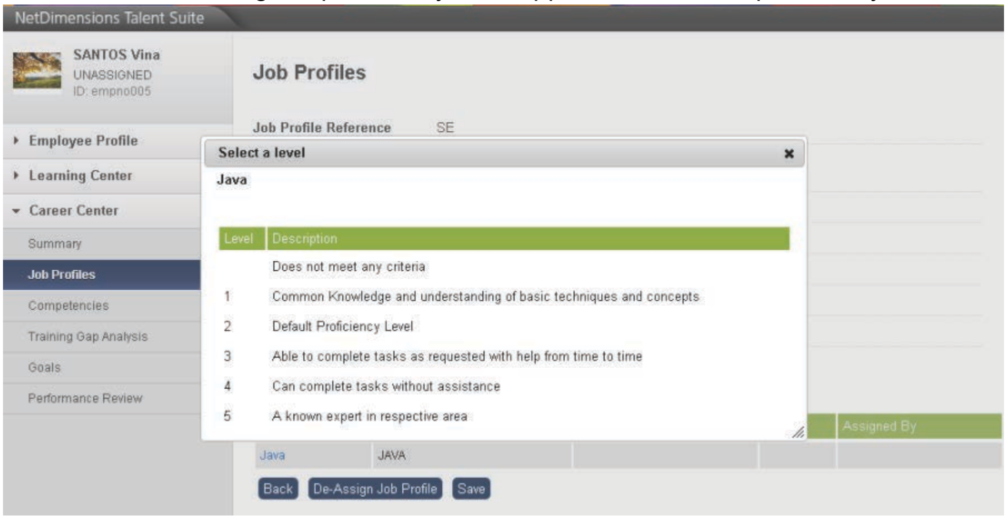
On the **Career Development Center > Career Center**, click the **Job Profiles** tab. Click the job profile you want to modify.



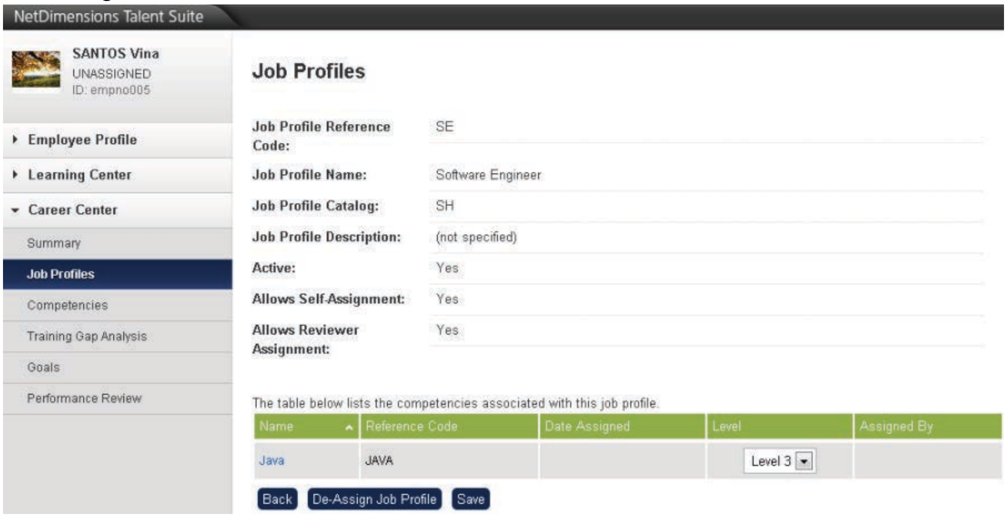
The job profile details appear on the screen. To change the proficiency level, click the **Select Level** drop down button.



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

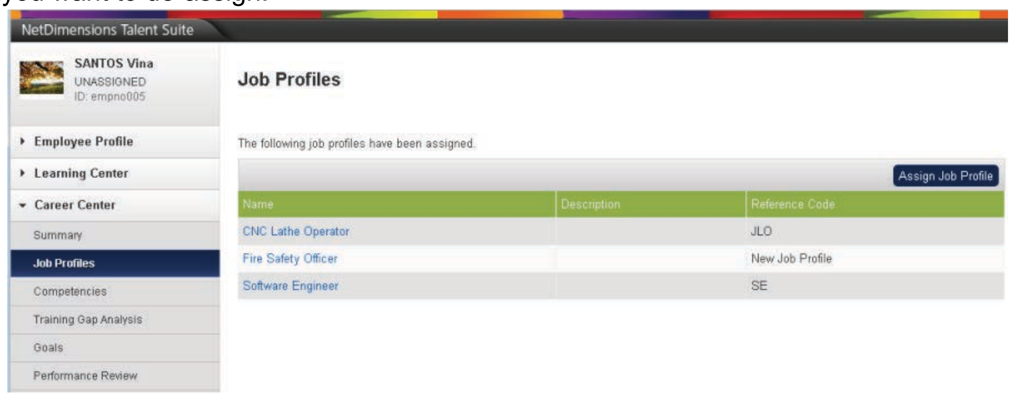


This return to job profile details with the new proficiency level displayed. Click the **Save** button to keep the changes.

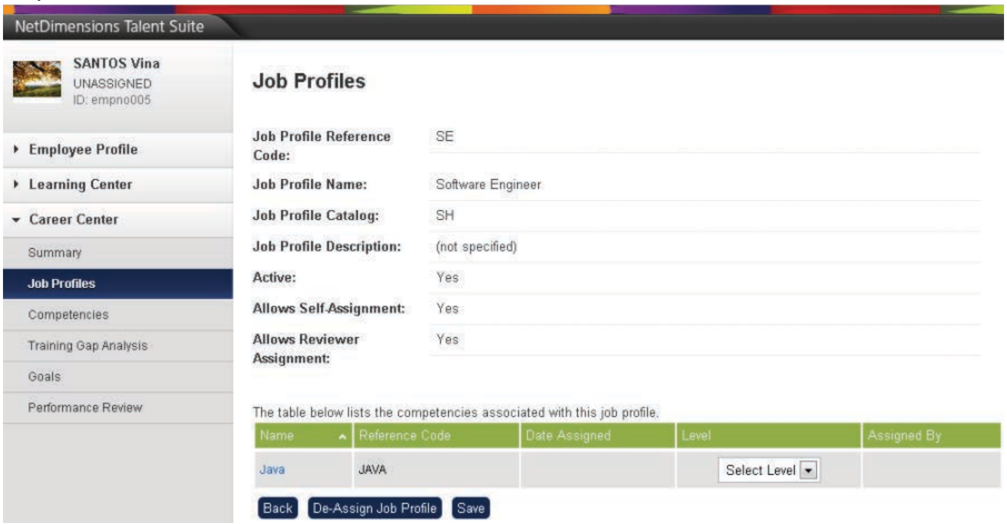


De-Assigning Job Profile

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

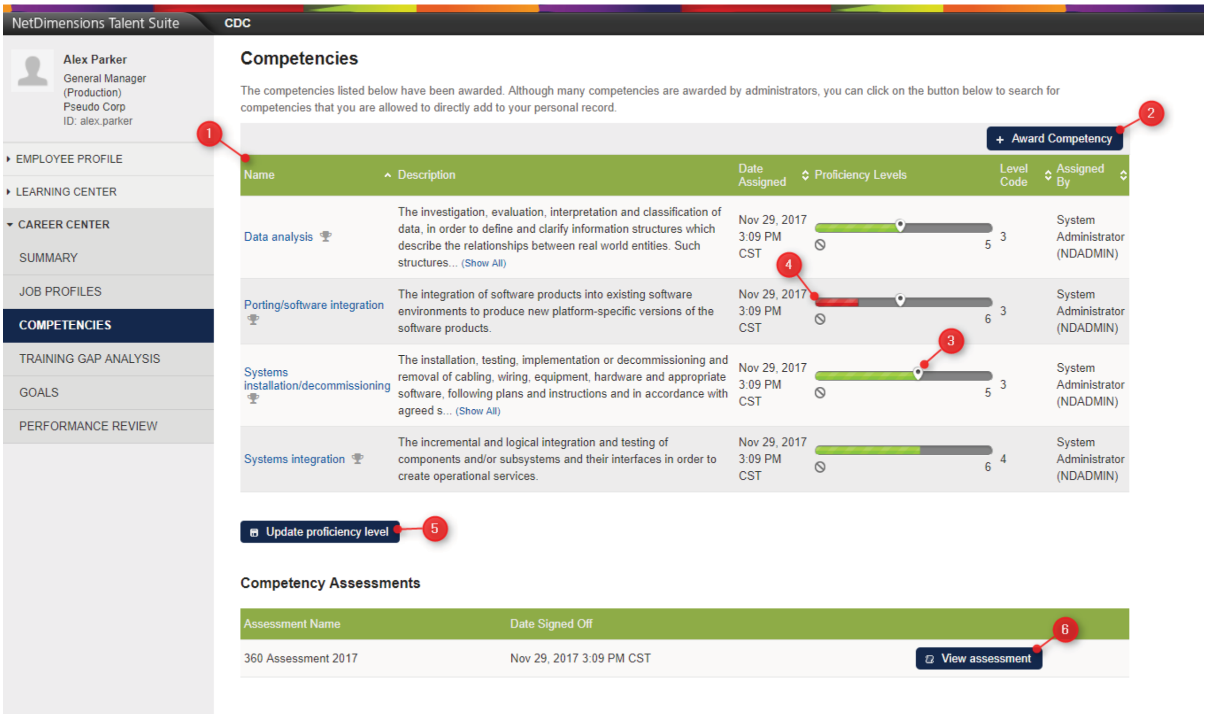


The job profile details appear on the screen. To de-assign job profile, click the **De-Assign Job Profile** drop down button. After which, the screen returns to **Job Profile** tab.



Competencies

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

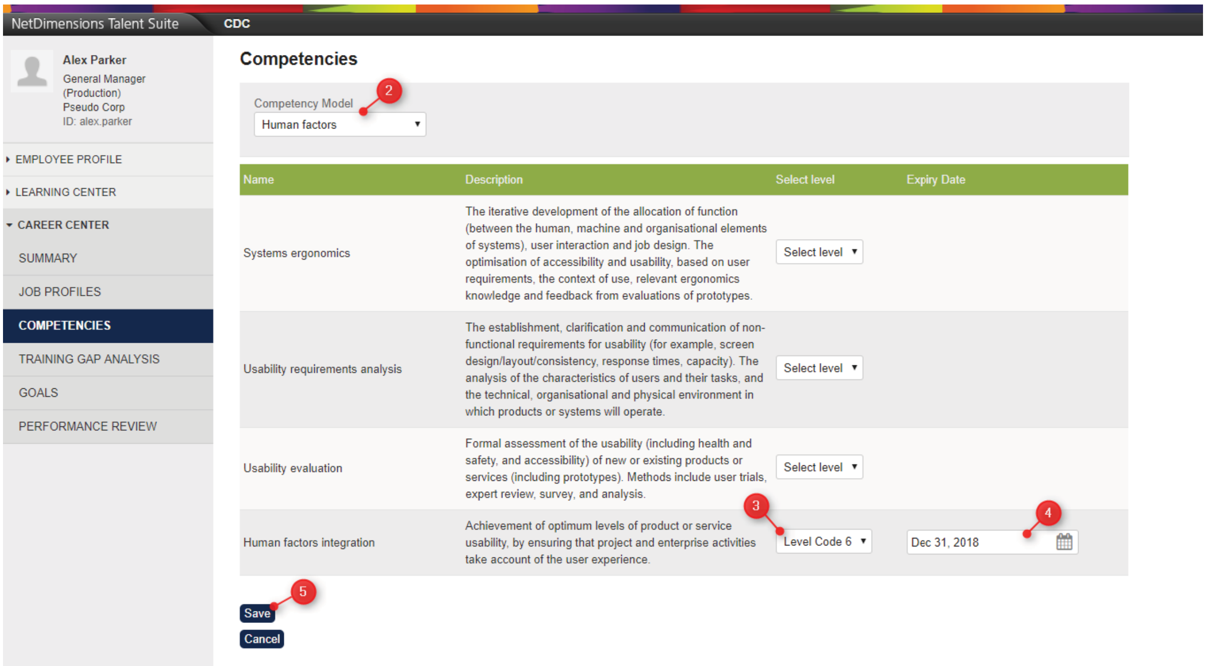


1. Summary of current competency proficiency levels acquired by User
2. Award Competencies
3. Proficiency Level Required by assigned Job Profiles (if applicable)
4. Red progress bars indicating a gap between current proficiency level and the level required for assigned job profiles
5. Update proficiency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

Awarding Competencies

To award competencies

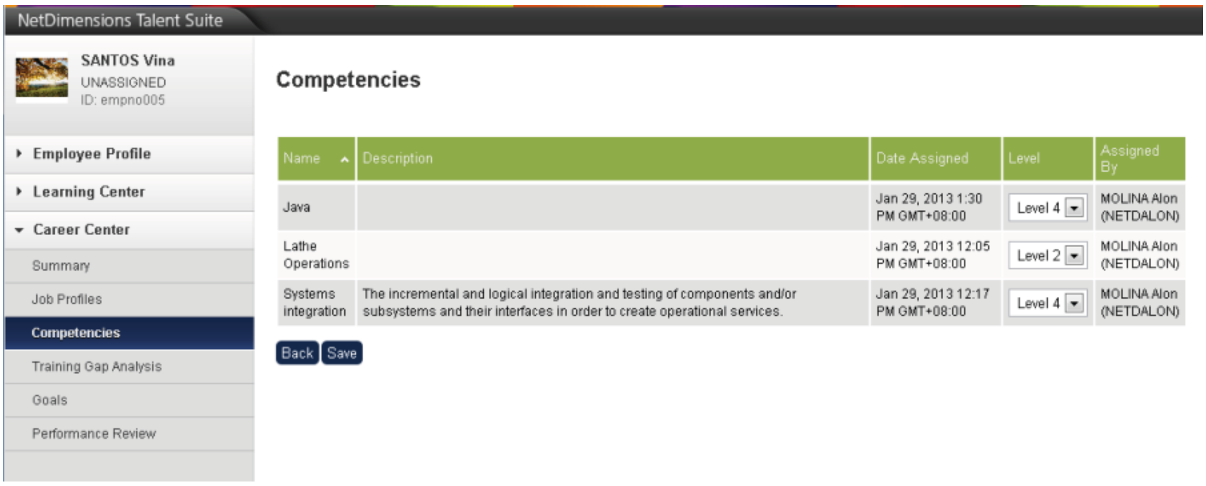
1. Click Award Competency
2. Filter by Competency Model
3. Select the Proficiency Level to award
4. Enter expiry date if applicable
5. Save



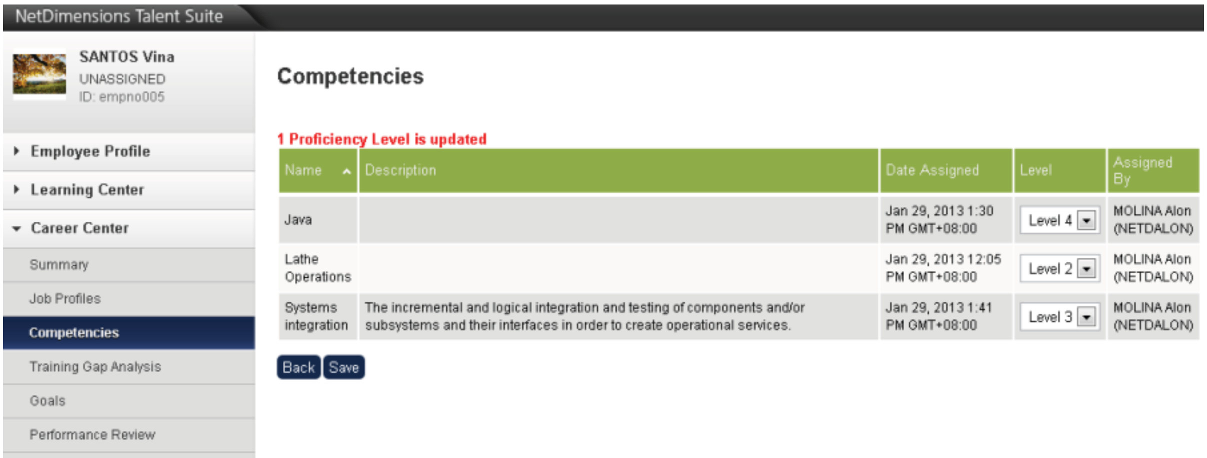
Updating the Proficiency Level

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.



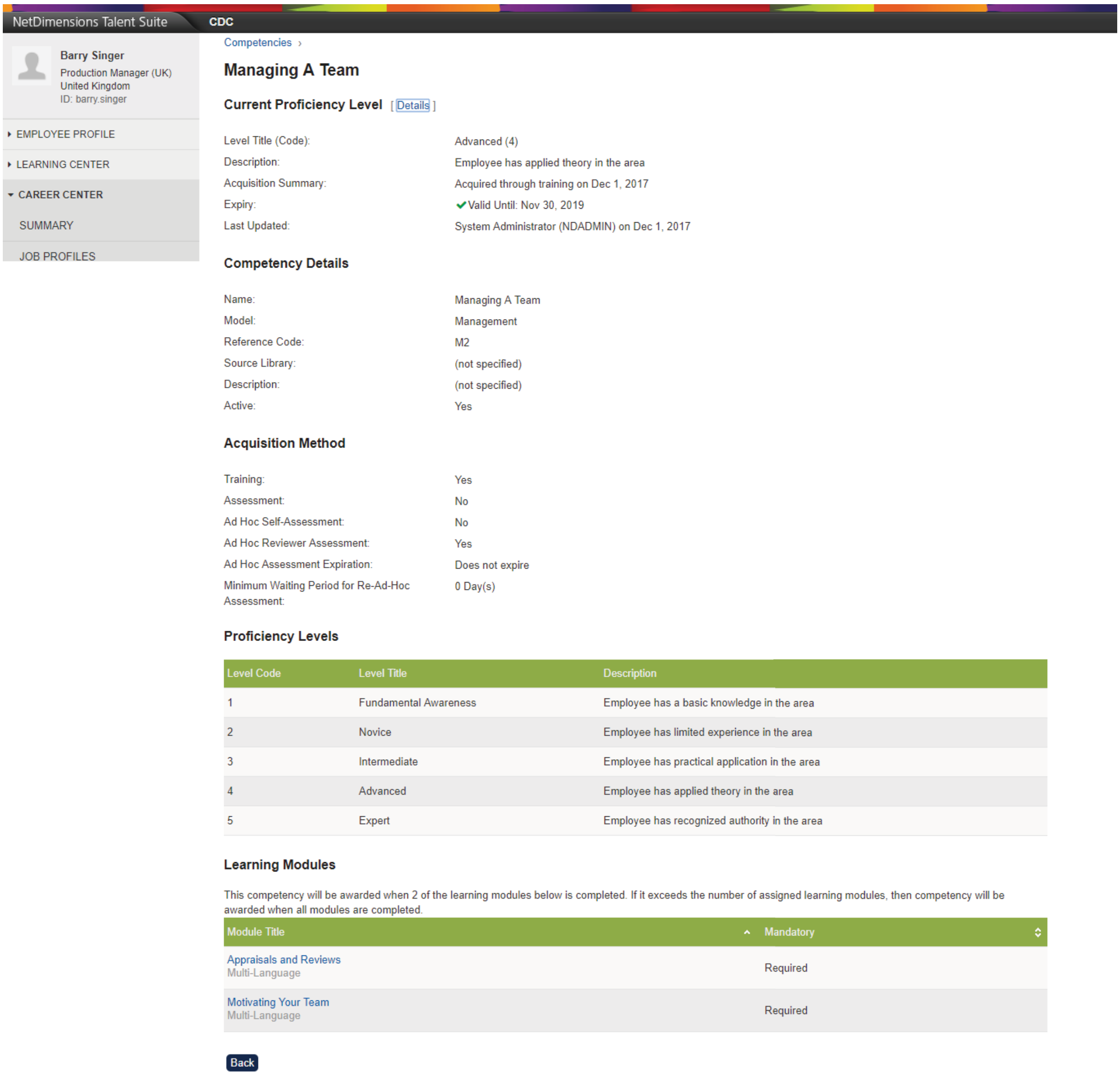
A confirmation message is displayed that the competency's proficiency level has been updated.



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:

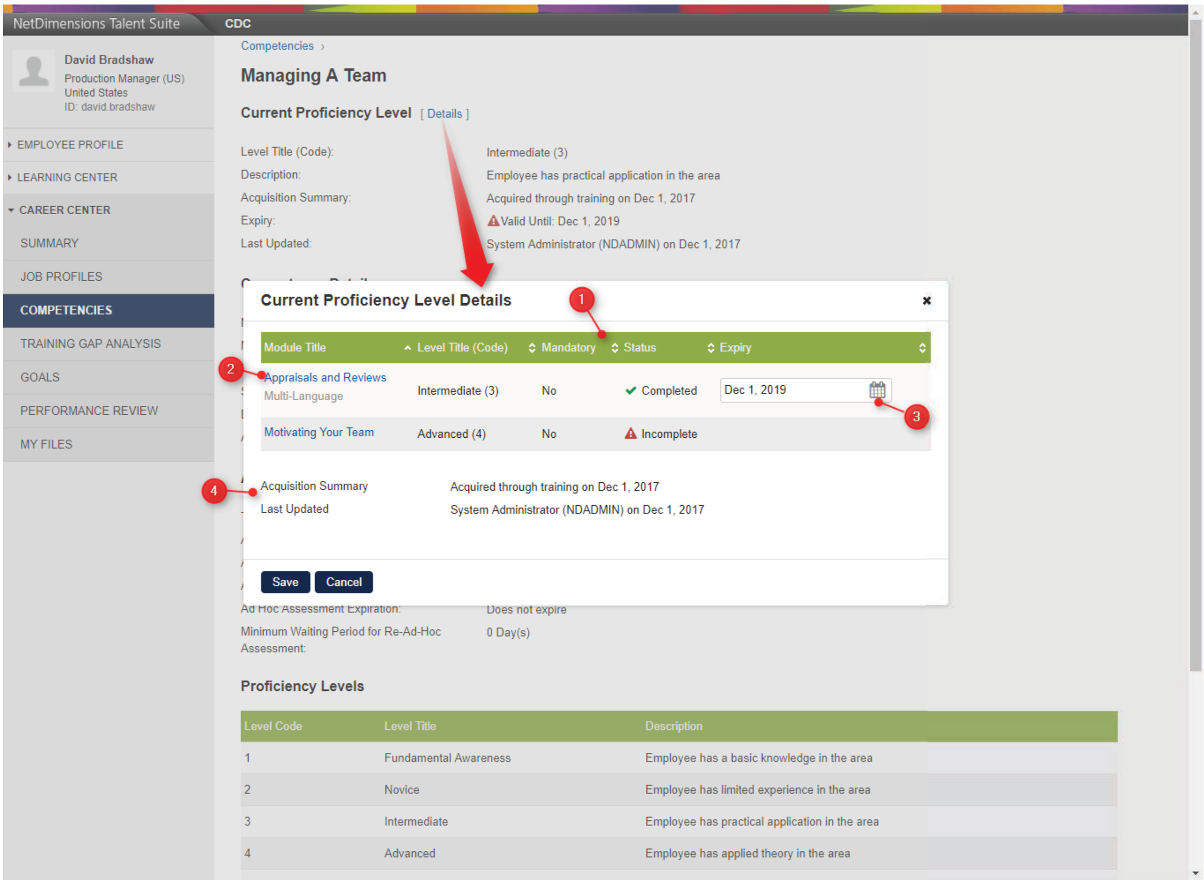
- Current Proficiency Level
- Competency's properties
- Acquisition Method
- Proficiency Level Scale
- Learning Modules



Current Proficiency Level Details

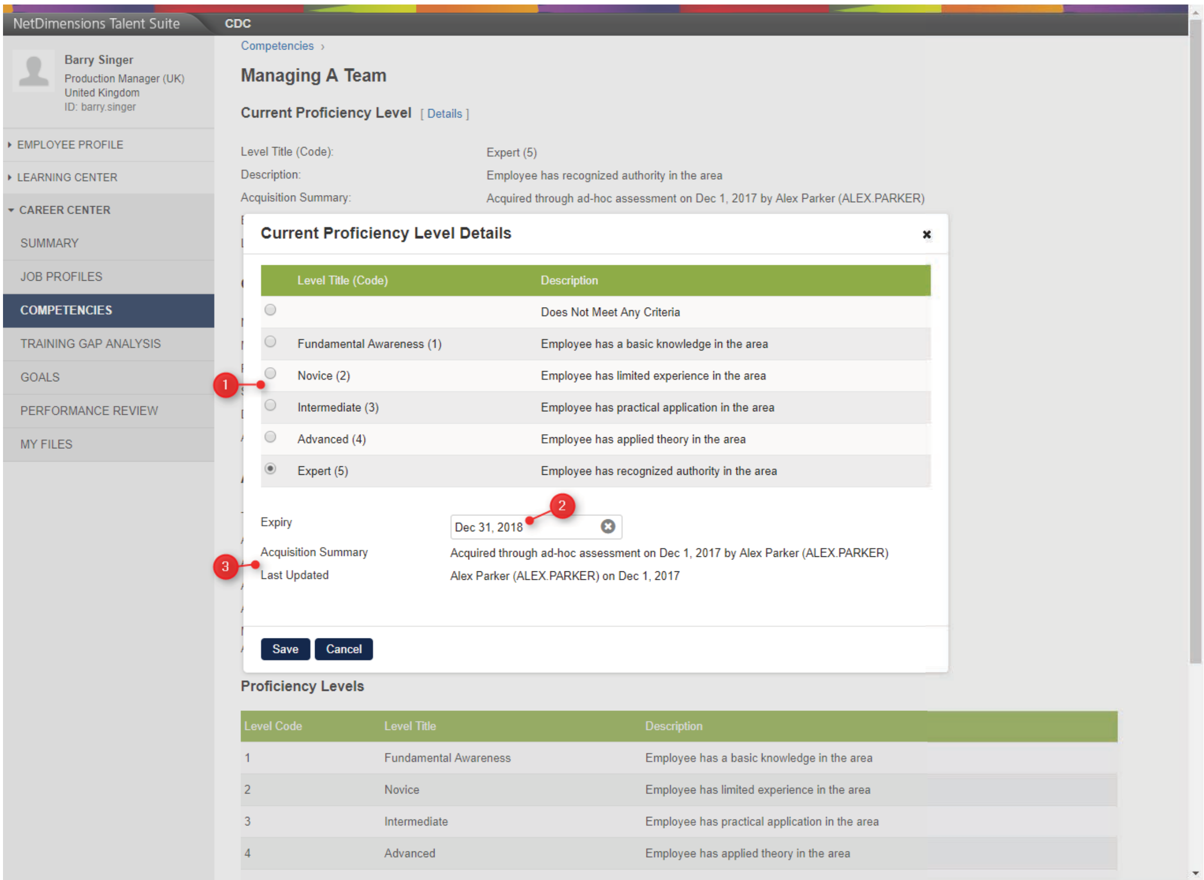
If the Current Proficiency Level has been acquired through training, clicking the Details link provides access to

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



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



Training Gap Analysis

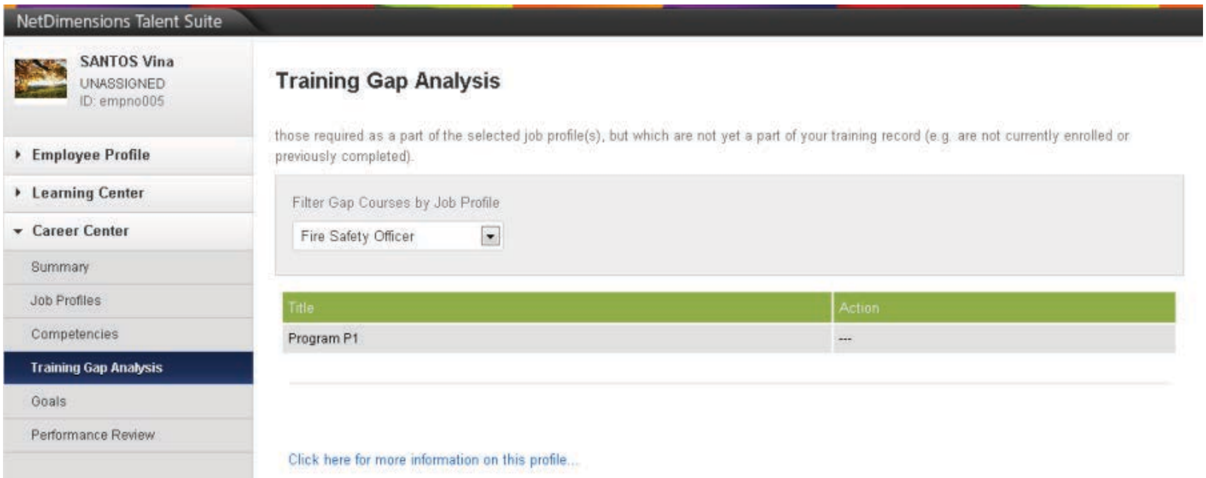
The Training Gap Analysis in the Career Development Center, determines the required training assignments associated with the user's current job profiles(s) or other profiles the user is permitted to review, and list those courses not yet found in their training history. Courses in which the user are 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.



Goals

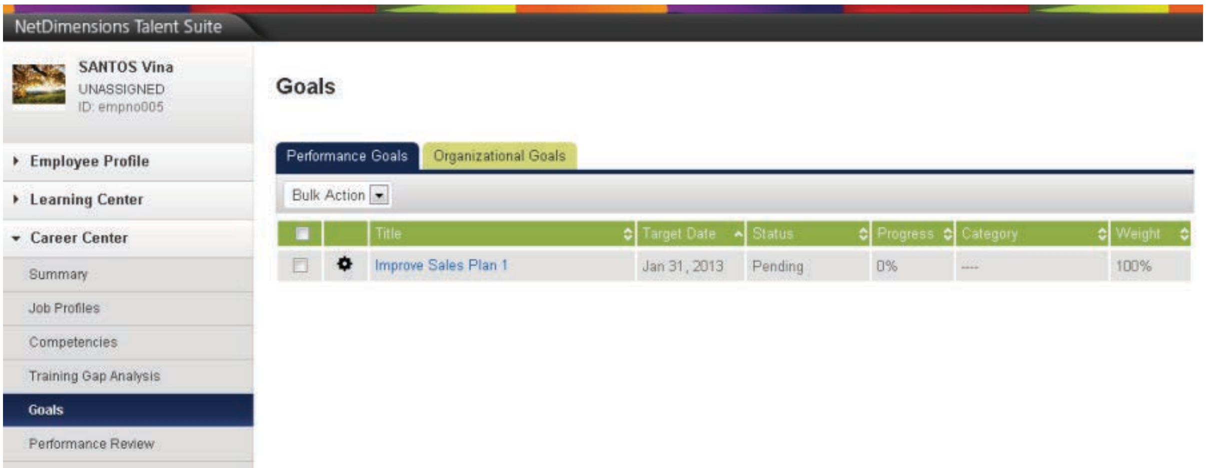
The **Goal** section of the **Career Development Center** allows the manager to view the goals (both perfo rmance and organizational) associated with the learner. This feature allows them to do the following:

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

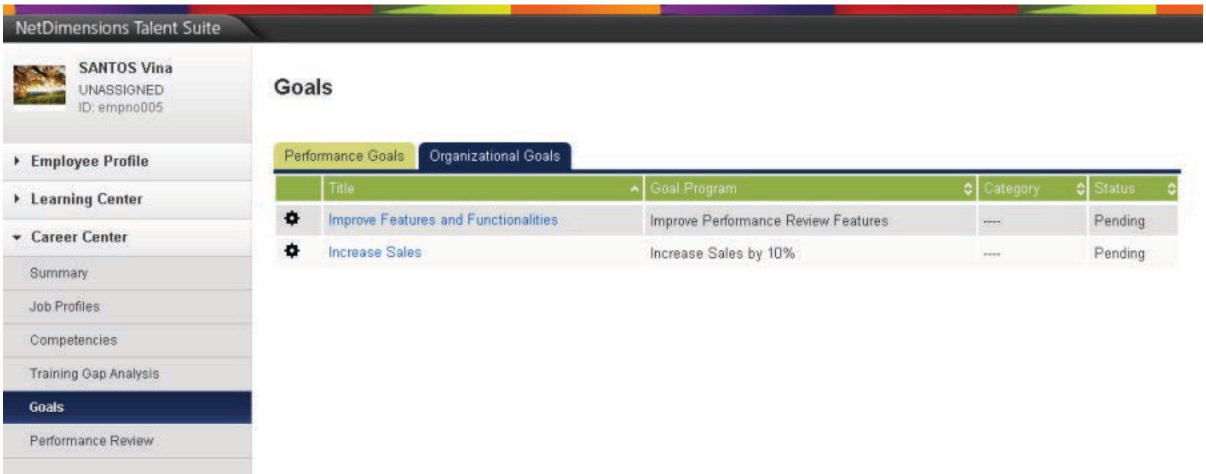
Note:
The Organizational Goals Hierarchy and Organizational Goals editor can only be accessed by the own er.

Viewing the Learner's Performance and Organizational Goals

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

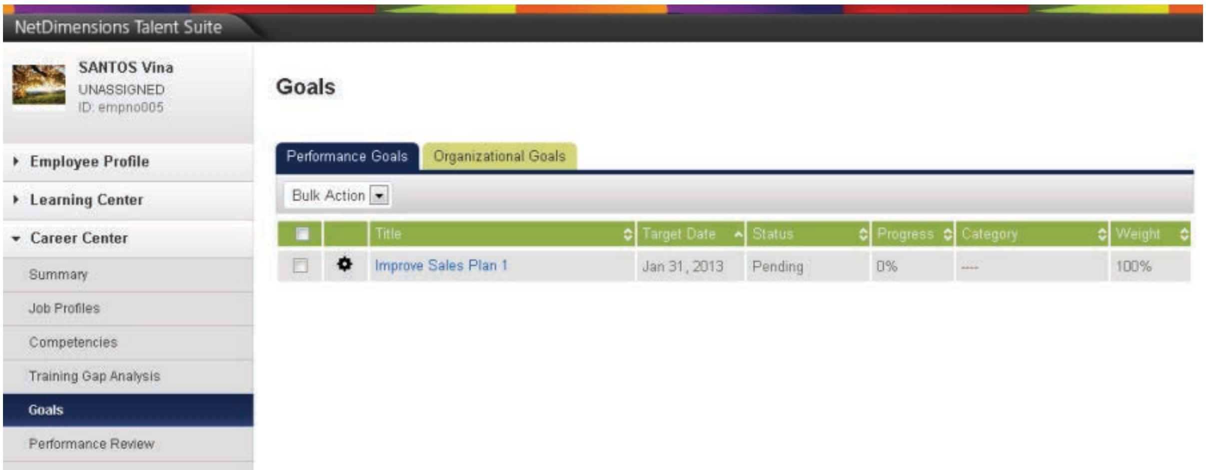


To display the learner's organizational goal, click the **Organizational Goals** tab.

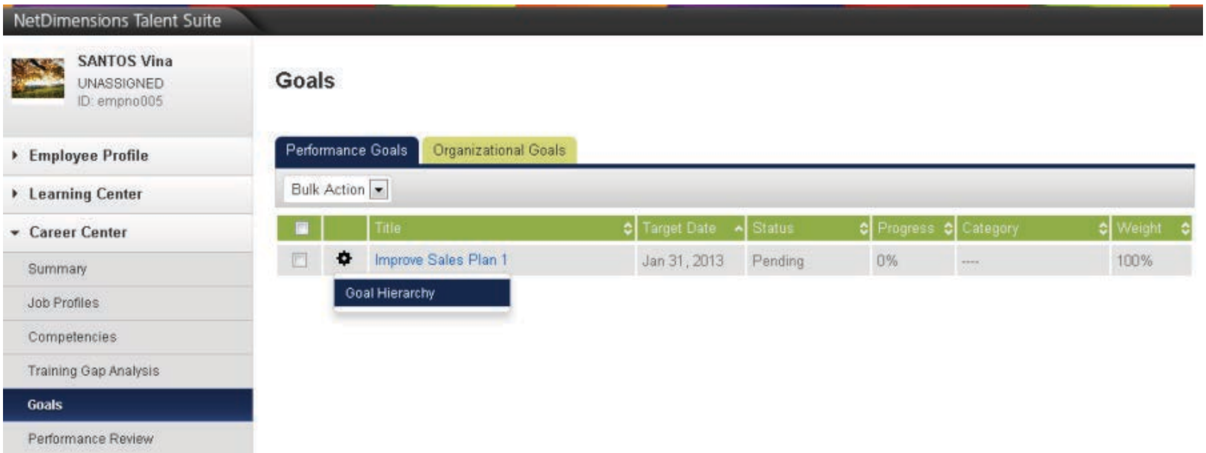


Viewing Performance Goal Hierarchy

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



Click the **Tools** icon and select **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
Switch to Detailed View
Increase Sales
Improve Sales Plan 1
Increase Sales
Organizational Goal
Category: Sales
Owner: SANTOS Vina
Back

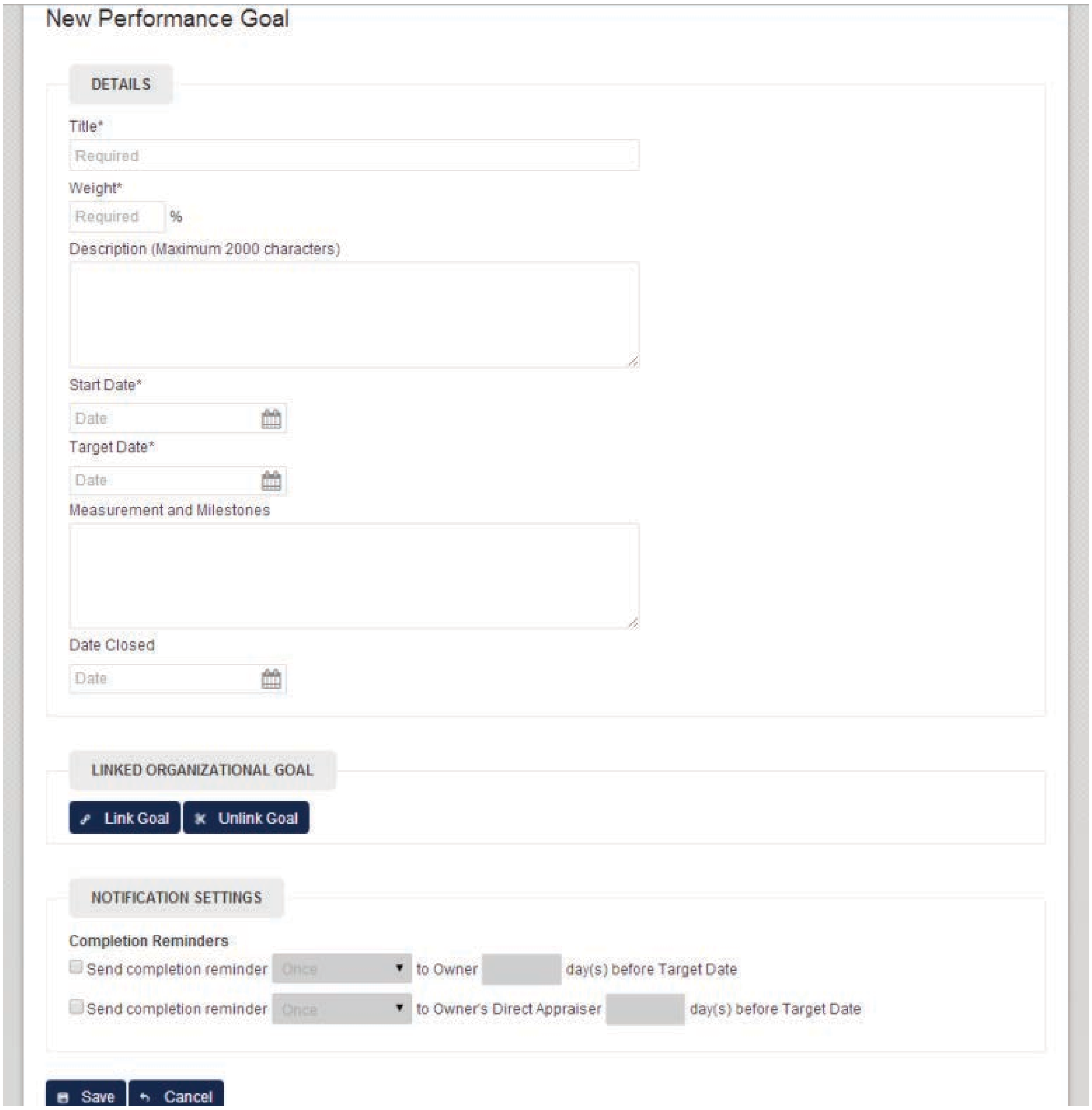
Performance Goals

(Available for Performance only)

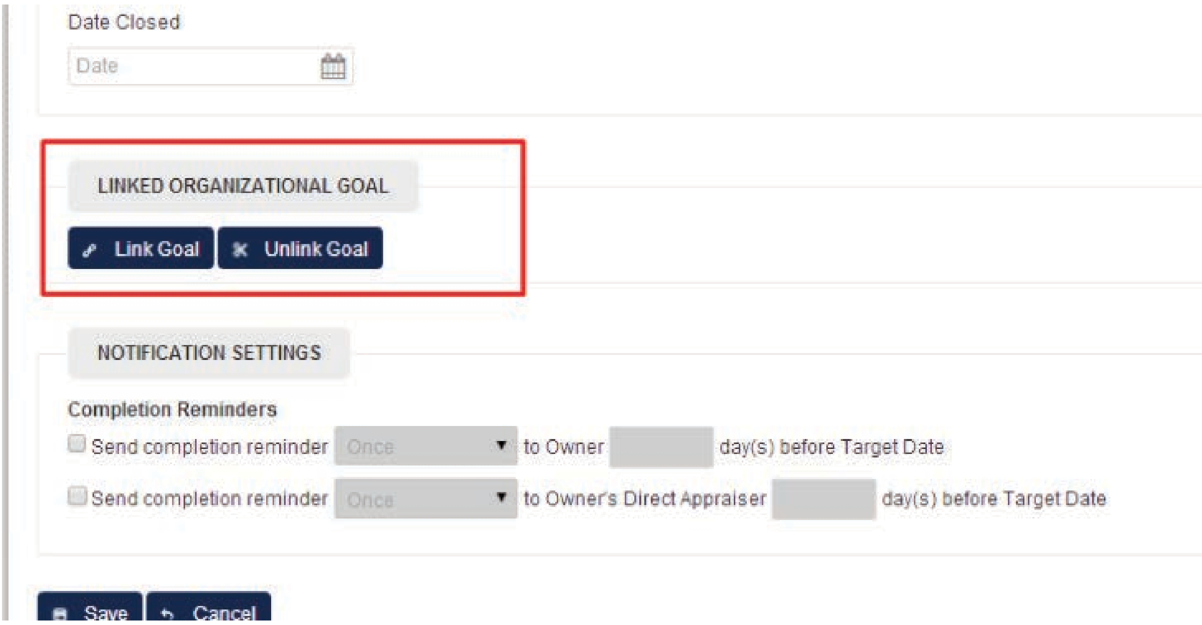
Creating and Linking Performance Goals

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

1. From here enter the performance goals details:
    - Title
    - Weight
    - Description
    - Start Date / Target Date
    - Measurement & Milestone
    - Date Close



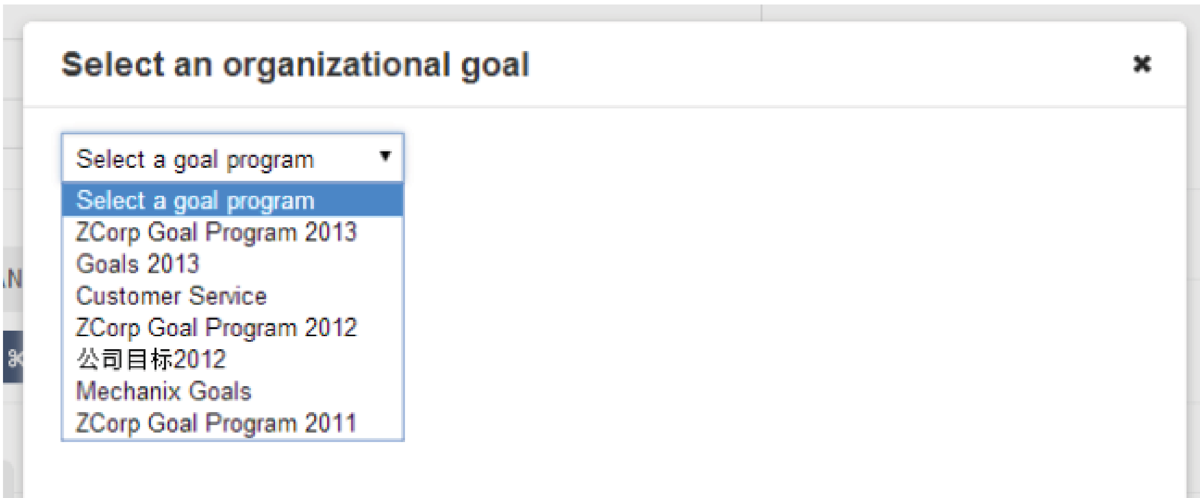
During the creation of the new performance goal, you have an option to link the goal to an organizational goal:



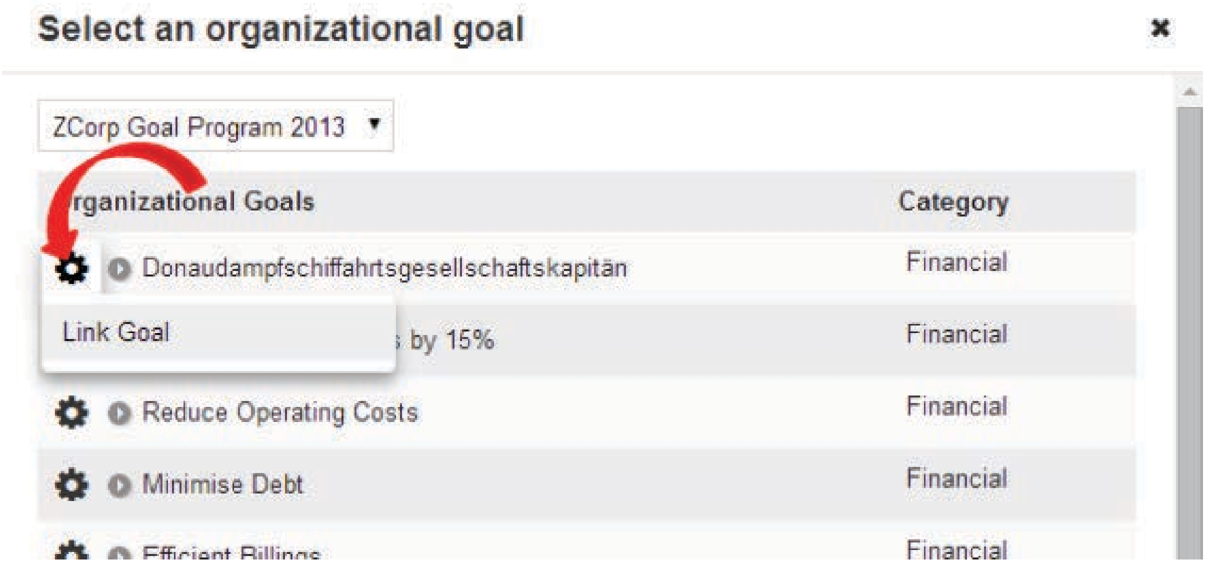
Click the **Link Goal** button. The **Select Organizational Goal** screen appears.

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.



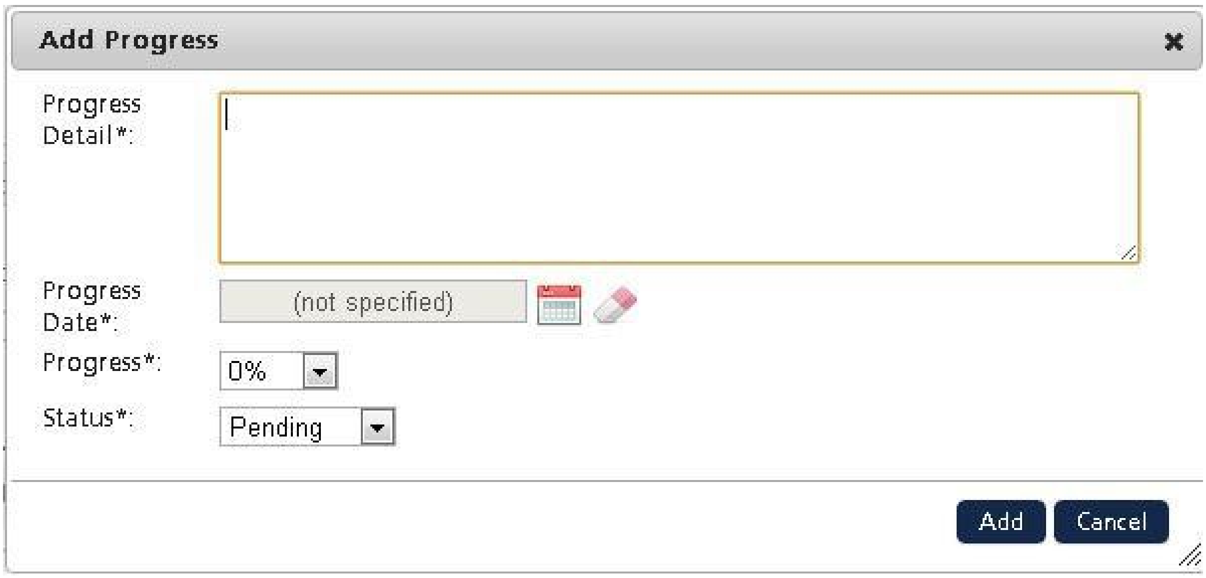
Click the **Gear** icon and then select **Link Goal** of the organizational goal you want to link:



Click the **Save** button.

Updating Goals

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



The dialogue requires the user to enter the following parameters:

- Progress Detail
- Progress Date
- Progress
- Status

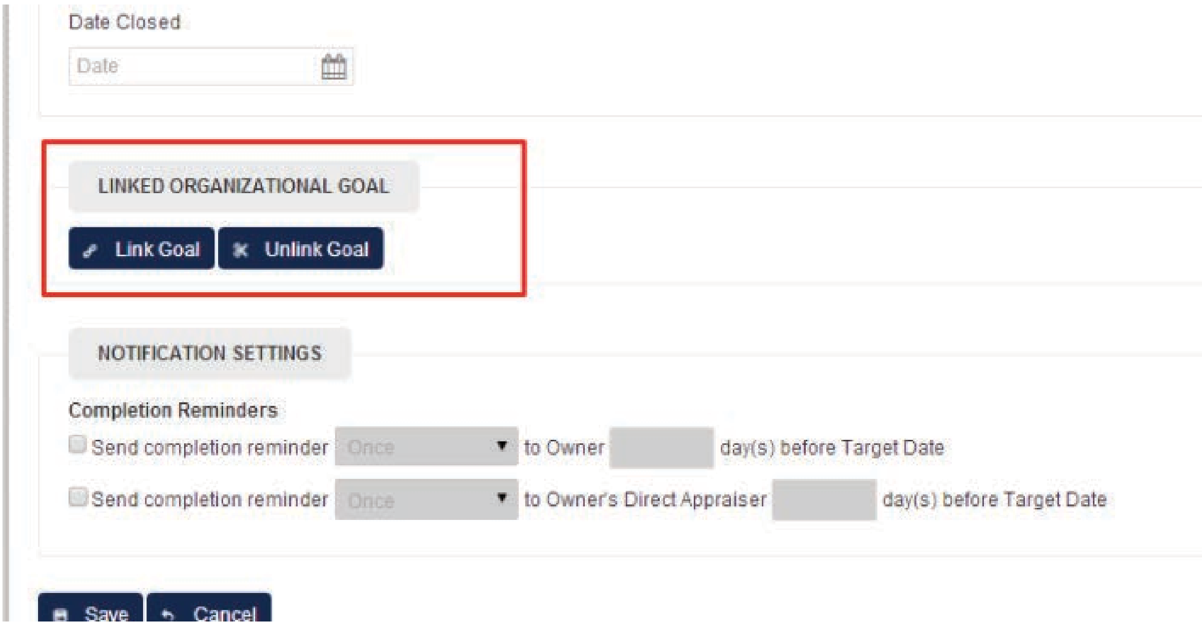
Once completed, click the **Add** button. The screen returns to Performance Goal details screen with the new progress added under the progress section.

Note: To remove a progress update, click the Remove button located at the last column of the progres s 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:



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

Deleting Goals

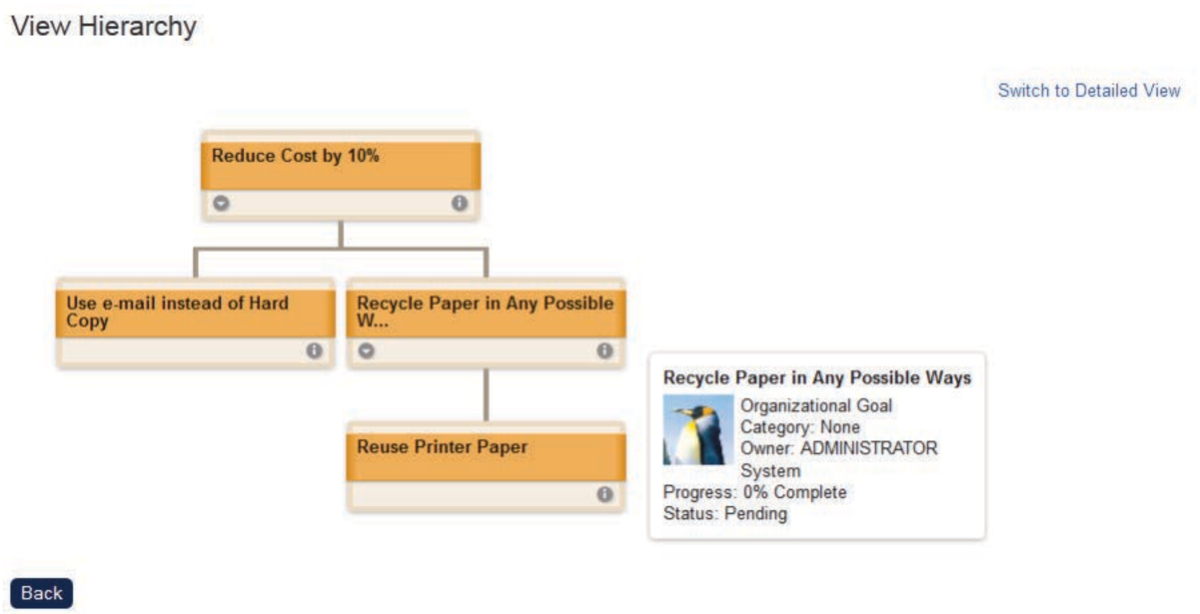
You can delete goals individually while editing a goal or in bulk under the Performance Goals tab

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 b**utton of the performance goal you want to view and then select **Goal 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.