Recruit, Develop, Perform, Reward

PeopleFluent Learning

21.04

HR Administration

An overview of HR Administration features in PeopleFluent Learning 21.04

www.peoplefluent.com/products/learning

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Introduction

This document covers the following features:

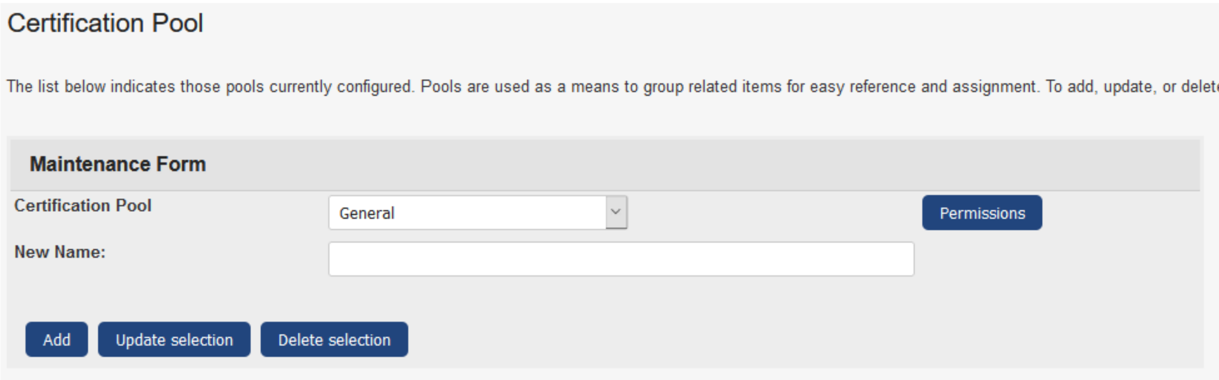
- Certifications
- Competencies
- Job Profiles
- Goals
- Performance Appraisals

Certification Manager

Certification Pools

You can create certification pools to group related certifications for easy reference.

To create and configure certification pools, go to **Manage Center > Learning > Certification Manager > Certification Pool**.



To create a Certification Pool:

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

To update a certification pool:

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

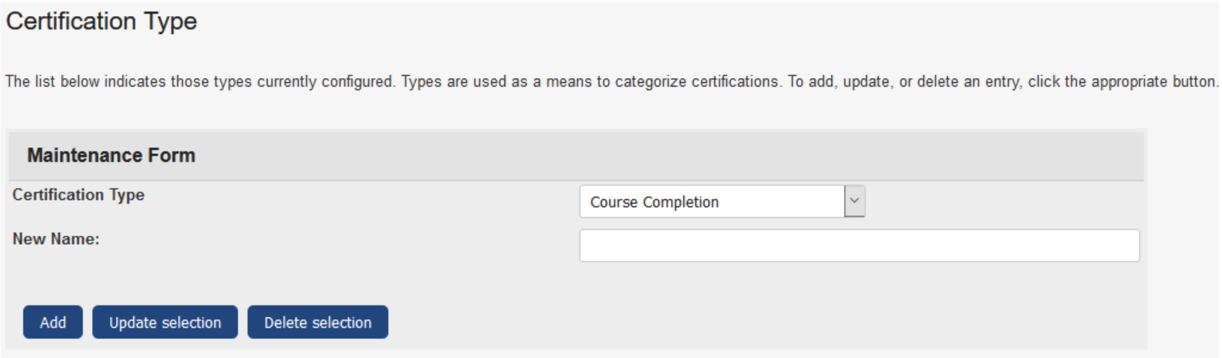
To remove a certification pool:

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

Certification Types

You can create certification types to categorize certifications, such as internal, external, or level of attainment.

To create and configure certification types, go to **Manage Center > Learning > Certification Manager > Certification Type**.



To create a new Certification Type:

1. Enter the name of the new certification type in the **New Name** field.
2. Click **Add**.

To modify a Certification Type:

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

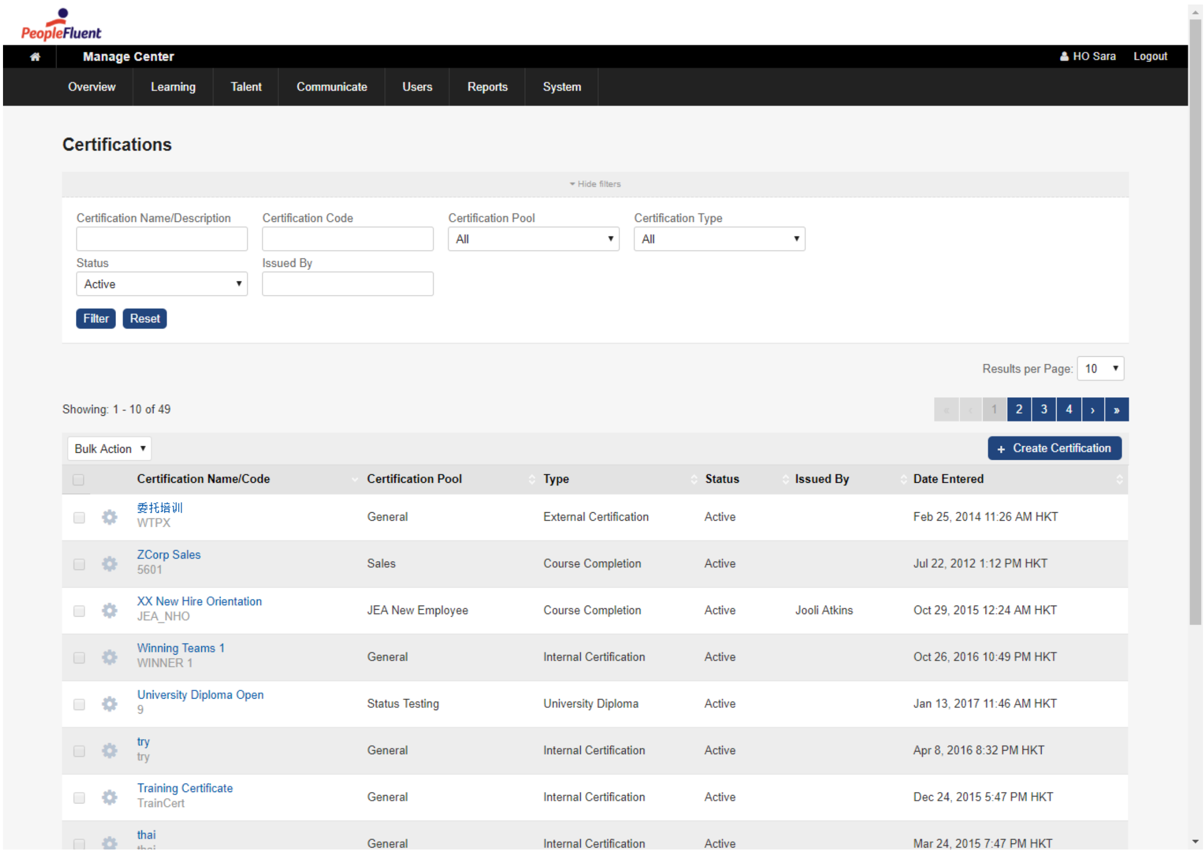
To remove a Certification Type:

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

Certifications

To manage certifications, go to **Manage Center > Learning > Certification Manager > Certifications**. From here you can:

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



Form Fields for PDF Certificates

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

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

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

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

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

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


NetDimensions®
Talent Suite

Certificate Name: Cert Last a Year
Certificate ID: 276401
Award ID: EKP-0055-3610-1831-0793
Award Date: September 2, 2013
Expiration Date: September 2, 2014
Serial Number: 101-276401
System Timestamp: October 22, 2013

Course Name: Classroom With Cert
Course ID: CLASS-003
Course Duration: MyDurationComment
Course Start: September 1, 2013
Course End: September 2, 2013

User Name: Learner PID
Job Title: MyJobTitle
Date of Birth: February 3, 1981
Address 1: MyAddress1
Address 2: MyAddress2
City: MyCity

Job Type: Permanent
Blood Type: O
Gender: Male
Nationality: British
MyExt1Value
MyExt2Value

Module Description: My Module Desc
Session Title: My Session Title 1
Facility Code: Various Locations

My Objective 1
My Objective 2
My Objective 3

Instructor Name: Direct Appraiser Pid
Instructor Job Title: PidDirectAppraiser
Department Name: PidDept
Instructor Signature:

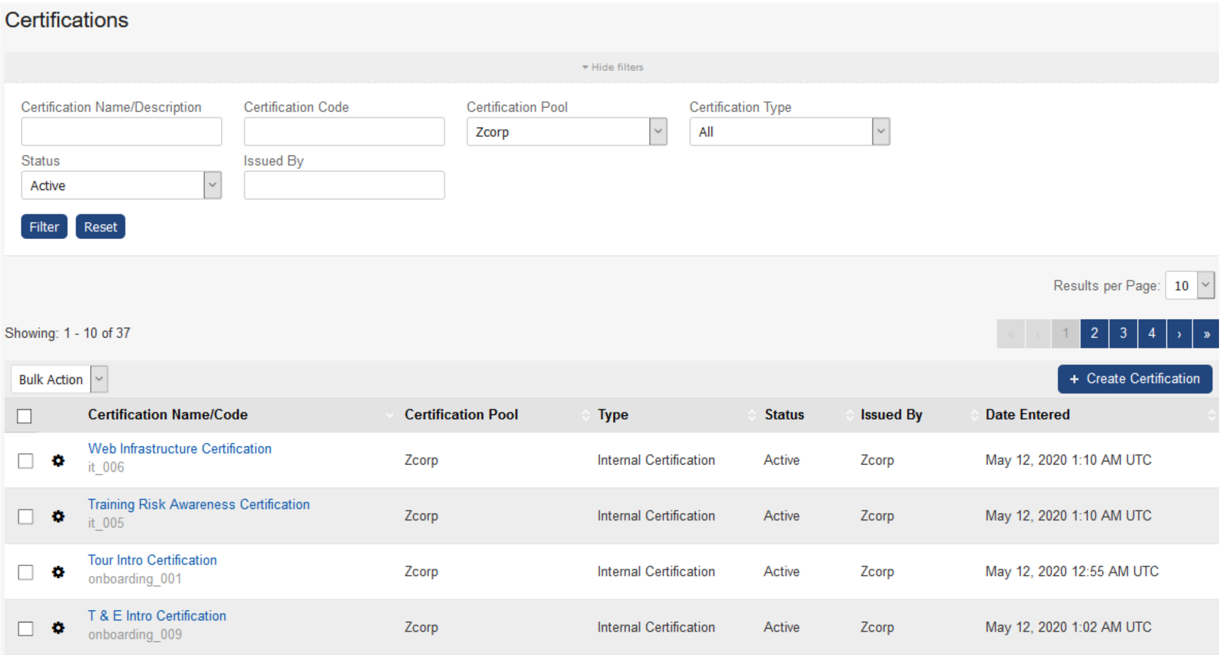
Director Name: Administrator Pid
Director Job Title: PidAdmin
Department Name: PidDept
Director Signature:

A sample certificate PDF with dynamically populated fields

Searching for a Certification

Under **Manage Center** >**Learning > Certification Manager > Certifications**, the Users can search for a certification with the filters. The search can be done:

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



The search filters are also available in the Certification Selector.

Certification Details

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

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

Info: Inactive Certifications

For Inactive Certifications:

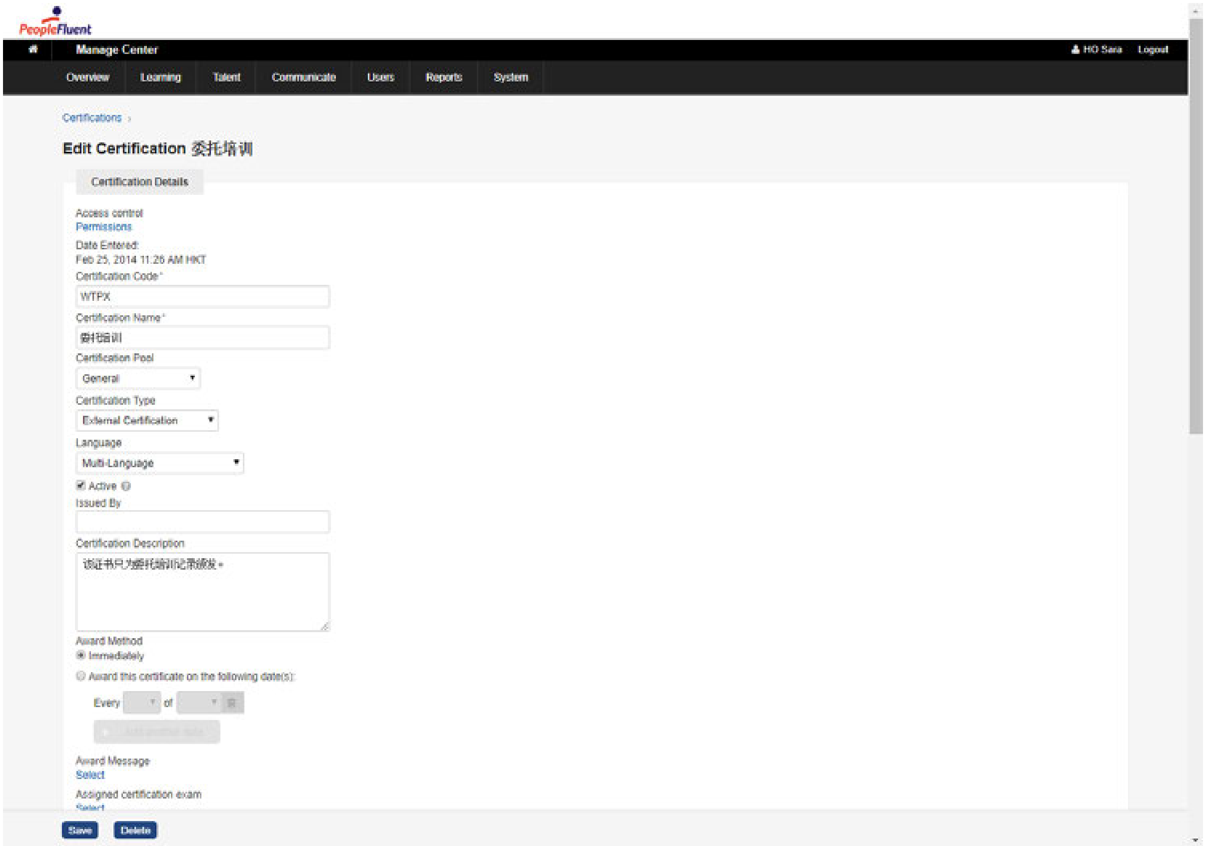
- They will not be assignable to any users, either manually or automatically;
- They have been excluded from automated tasks. They will not result in automated notifications or enrollments;
- They will not be listed for Learners as Current (My Certifications) or Expiring (Widget).

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

- They cannot award or request approval of certificates that are of inactive status in the Certifications of the Learner's Career Development Center.
- They cannot approve Inactive Certifications at Certification Approval.

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

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



Award Method

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

- **Immediately**; or
- **Award this certificate on the following date(s):**
  Every {Date} **of** {Month} - the Certification is to be awarded on the selected date of the selected month every year. Click **+ Add another date** if necessary.

Award Message

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

Assigned certificate exam

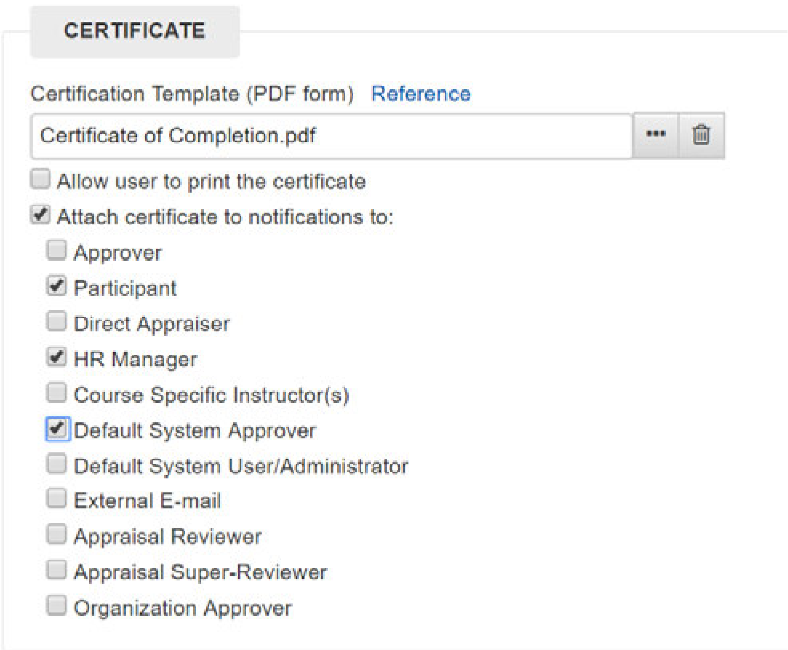
If the Certification will be attached to a module / program, Click **Select** to bring out the **Selector** to configure this association. There are two conditions for awarding the Certifications:

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

Certificate

The CERTIFICATE Section is for assigning certification templates.

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



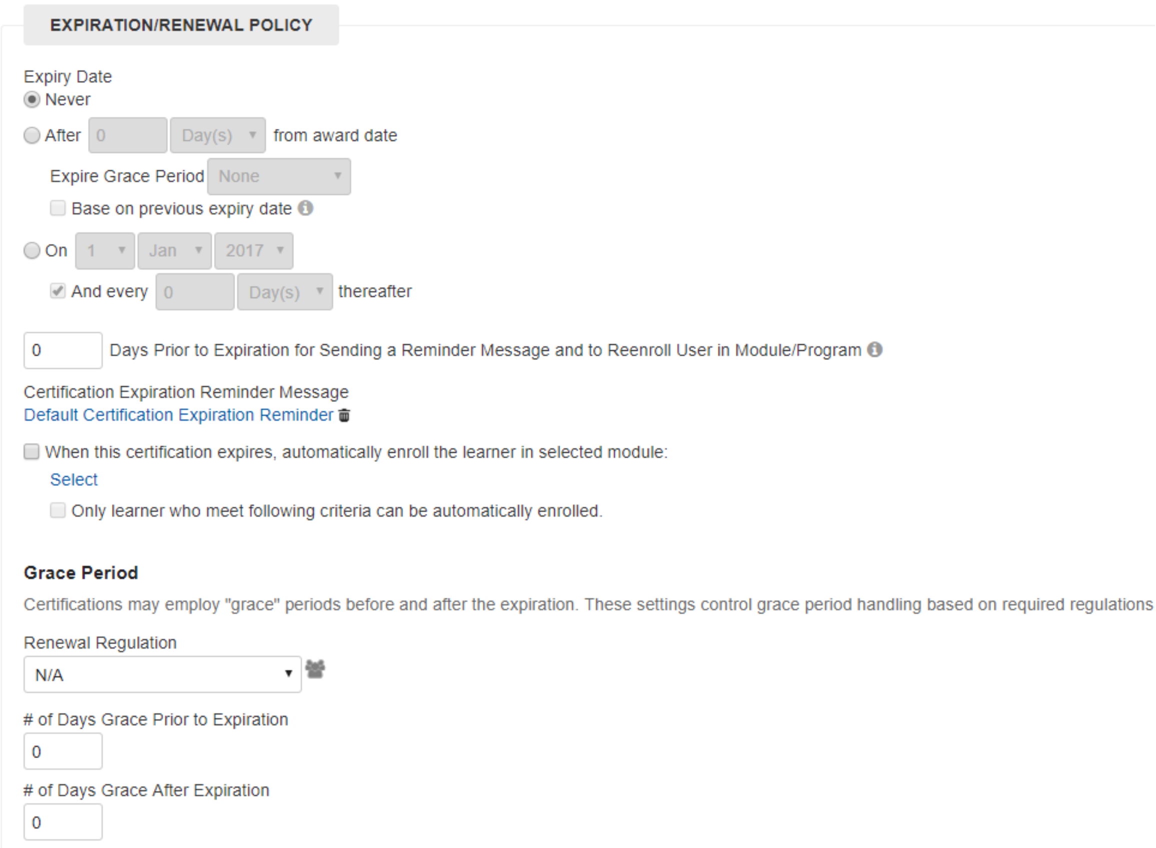
Expiration / Renewal Policy

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

For Expiry Date

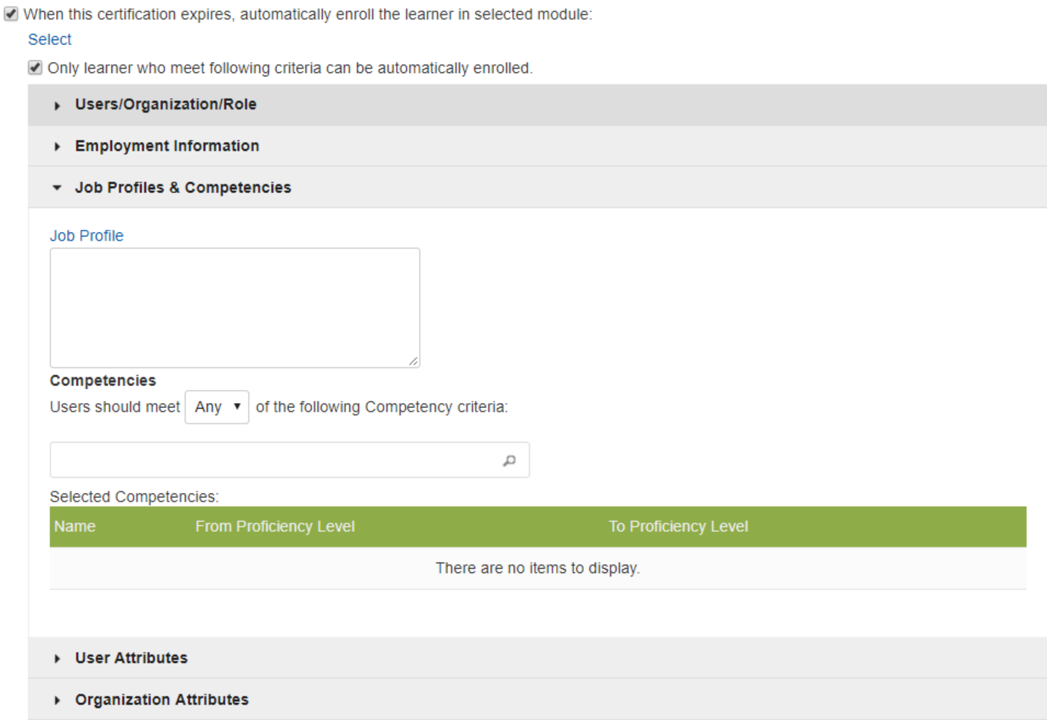
- If the certificate is not supposed to expire, select **Never**.

- The Expiration / Renewal of Certificates can be set **After _____ Day(s) / Year(s) from award date**.
    - **Expire Grace Period**
        - **None**: No Grace Period for the Expiry Date;
        - **End of Month**: A Grace Period till the end of the expiry month will be granted.
    - **Based on previous expiry date**:
        - Applicable to the certifications awarded at course completions but not by Direct Appraisers.
        - If the previous certification is still <u>valid</u> - once checked, the Expiry Date will be calculated based on the expiry date of the previous certification.
        - If the previous certification is <u>expired</u> - once checked, the Expiry Date will be calculated based on the Award Date of the new certification.
- The Expiration / Renewal of Certificates can be set **On** a specific date (Date; Month; Year). When a specific date is chosen, a renewable period can be entered by checking **And every ____ Day(s) / Year(s) thereafter**, inputting the number in the text box, and selecting **Day(s)** or **Year(s)**. The System will display a tooltip showing the upcoming expiry date and the next three expiry dates calculated based on the input settings.



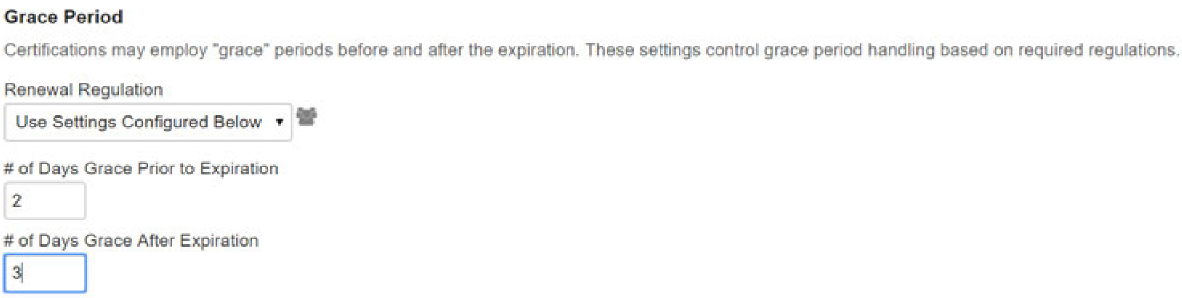
- **____ Day(s) Prior to Expiration for Sending a Reminder Message and to Reenroll User in Module/Program**: this setting determines whether to send a reminder message to the users and re-enrol them into the module / program a certain number of days before expiration; the number is entered into the text box.
    - Setting this field to zero means that no reminder will be sent prior to expiration, but the LMS will still proceed with assigning the users to a module / program.
    - The contents of the *Certification Expiration Reminder Message* can be set by clicking **Default Certification Expiration Reminder** to bring out the **E-mail Template Editor** window.

- **When this certification expires, automatically enroll the learner in selected module**: - Select this check box to automatically enroll the learners to an assigned learning module once the certification expires.
    - Click **Select** to bring out the to choose the required module(s).
    - **Only learner who meet following criteria can be automatically enrolled** - Select this check box to set the criteria of the learners to be included. A list of criteria will be displayed; click the desired item(s) to expand for setting:



For Grace Period, you can configure:

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



Certification Status Widget

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

- Only expiring/expired certifications will be listed in the widget.

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

Certification CSV Loader

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

Self-Award Certification

Self-award certification allows users to award themselves pre-defined certifications (subject to approval by the user's direct appraiser). You can also upload certificate attachments and approve certifications using the Awarded Cetificates CSV Loader. This enables digital proofs to be uploaded if necessary, and shares the same approval process. Other features available for self-awarded certifications include:

- Notification and automatic re-enrollment for expiring certifications
- Reports associated with certifications awarded
- The certificationsAwarded API

To see your current and expired certifications, and to self-award a certification, go to **Home > Learning Center > Certifcations**. The Certifications page opens.

To self-award a certifications, subject to approval, click the **Self-Award Certification** button on the Certifications for Approval tab.

Selection certifications is subject to the user's permissions. For instance, if *User B* doesn't have permission for *Certification A*, then they won't be able to self-award *Certification A*. In addition, if Expire Date is not entered at the time the self-award certification is saved, the Expire Date is automatically calculated according to the default Expiry Date settings of the selected certification.

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

When a user creates a self-awarded certification, the default Status of the certification is set to Open for Editing. This allows the user to make changes to the certification until it is finalized for approval, when the status is changed to Pending for Approval.This triggers the approval process (sending the request to the direct appraiser) and details of the self-awarded certification can no longer be edited.

Once the self-awarded certification is saved, it is listed in the Certifications for Approval tab on the Certifications page. The user can view and modify details of the self-awarded certification by clicking on the certification name. Remember that users are only allowed to make changes to their self-awarded certifications if their certifications have a status of Open for Editing or Approval Denied.

If the user decides to cancel or even delete the self-awarded certification permanently, the user may update the Status to Cancelled or click the Delete button respectively.

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

The Awarded Certificates CSV Loader

The Awarded Certificates CSV Loader has several fields that support self-awarded certifications:

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

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

Viewing/handling of Certification Approval Requests by Direct Appraisers

To process certification approval requests go to **Home > Workspace > Certification Approval**. The Certification Approval page opens and lists your direct employees.

To approve a certification award request, change its status to Approved. In cases where the Expire Date is not entered at the time the self-award certification is saved, it is automatically calculated according to the default Expiry Date settings of the selected certification. If a certification approval request is no longer valid, you can either Cancel or Delete the request permanently.

Certification Approval Role Access Control

To approve certifications, your user role must have Unrestricted access rights to Certification Approval.

Self-Award Certifications - Approved

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

If a digital proof is available, the External Reference column shows the file name as a link to download the file.

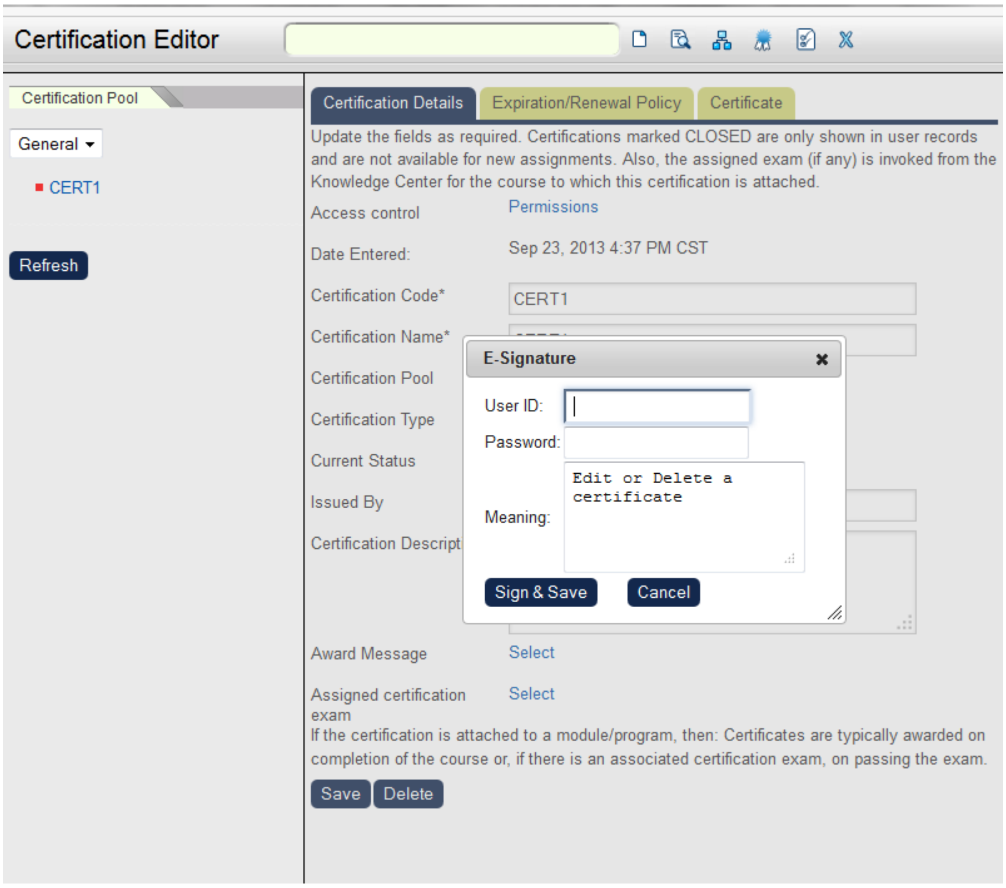
certificationsAwarded API

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


```
<award id="EKP-0010-7757-7760-6873">
  <certification>
    <name>CRT016</name>
    <issuer/>
  </certification>
  <issued>2016-08-01T08:00:00.000+08:00</issued>
  <comments>CRT016 Certification</comments>
  <certificate>
    <url>certificate?awardId=EKP-0010-7757-7760-6873</url>
  </certificate>
  <is_self_award>Y</is_self_award>
  <external_certificate>
    <external_reference_name>wwct.pdf</external_reference_name>
    <file_url>
      /ekpmain/servlet/ekp?TX=PREVIEWSELFAWARDFILE&ATTACHMENTID=EKP000107756
    </file_url>
  </external_certificate>
</award>
</awards>
```


E-Signature for Certifications

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



The E-Signature information can be retrieved from the standard reports R505 and R506.

eSignature for Awarding Certifications

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

To require/disable an eSignature for awarding certifications, turn on the Enable E-Signature for awarding/deleting User Certifications setting for the relevant organization.

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

After filling in the required information, click the **Award Certification** button. The system will ask for an eSignature.

To delete an award, click the cog icon next to the certification you want to delete, and click **Delete**. The system will ask for an eSignature.

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

Configure Certificate Award Attributes

You can configure Certificate Award Attributes much like how Module, Session, and Transcript Attributes are set up.

To configure Certificate Award Attributes, go to **Manage Center** > **Learning** > **Certification Manager** > **Certificate Award Attributes**.

You can do the following:

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

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

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

Setting Certificate Award Attributes

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

They can also be set when using the Awarded Certificates CSV Loader to import awards.

Certification Reports

To run standard reports relating to Certifications, go to **Manage Center > Reports > Certification Reports**.

The following reports are available:

- R601 - Certificate Awards Due to Expire
- R602 - Participants Not Certified
- R603 - Awarded Certificates Export in CSV Data Uploader Format (by Organizations)
- R604 - Awarded Certificates Export in CSV Data Uploader Format (by Participants)

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

Column	Column Set	Description
Certification Code	Certifications	The Certification Code
Certification ID	Certifications	The Certification ID Number
Certificate Name	Certifications	The Certification Name
Type	Certifications	The Certification Type
Primary Language	Certifications	The Certification Primary Language
Status	Certifications	"Active" or "Inactive" depending on the Certification Status
Issued By	Certifications	The issuing party for the Certification
Description	Certifications	The Certification Description
Certification Pool	Certifications	The pool to which the Certification belongs

[Attribute Name]	Certificate Award Attributes	Value entered for the "[Attribute Name]" Certificate Award Attribute
[Drop Down Attribute Name] - Code	Certificate Award Attributes	Value entered for the "[Drop Down Attribute Name] - Code" Certificate Award Attribute
[Drop Down Attribute Name] - Label	Certificate Award Attributes	Value entered for the "[Drop Down Attribute Name] - Label" Certificate Award Attribute

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

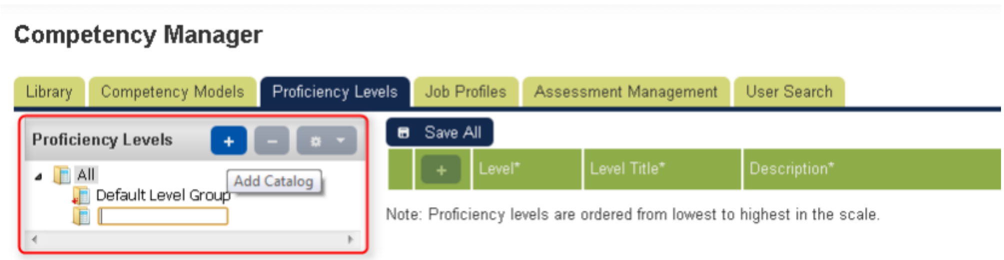
- **Certifications** - **Status Equals** "**Active**"
- **Awarded Certificate** - **Latest Award Equals** "**Yes**"

Proficiency Levels

(available for Performance and Learning only)

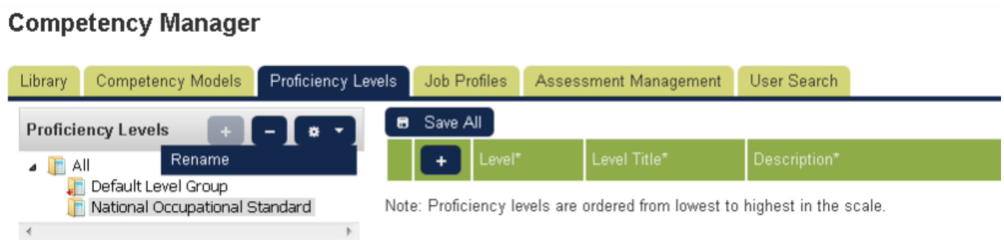
Creating a New Proficiency Level Group

To add a new proficiency level group, go to **Manage Center > Talent >** *Competency Manager* > **Profic iency Levels.** This leads you to *Proficiency Level* screen. On the **Proficiency Levels** section, click the **Plus** button. A new entry field for the proficiency level group appears on the bottom of the proficiency level group list. Enter the name of the new proficiency level group and then press enter. The new proficiency level group will be added on the list.

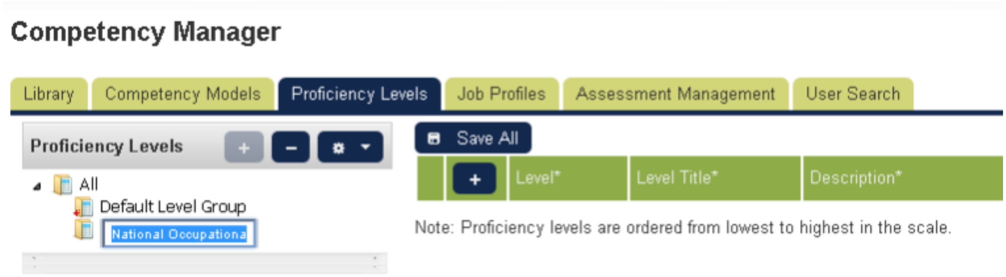


Renaming the Proficiency Level Group

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

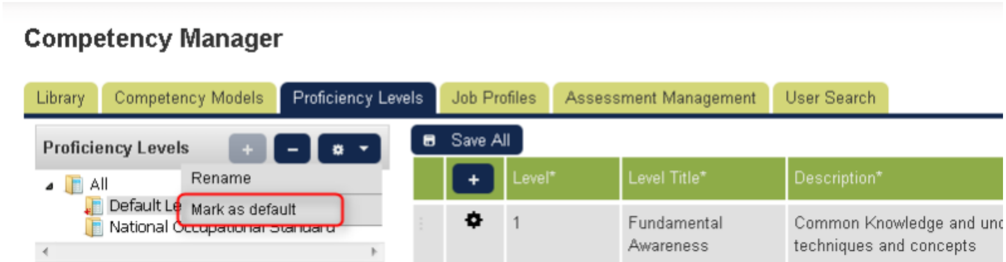


The selected proficiency level group will be editable. Start modifying the proficiency level group name and then press enter.



Setting a Proficiency Level Group as the Default

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



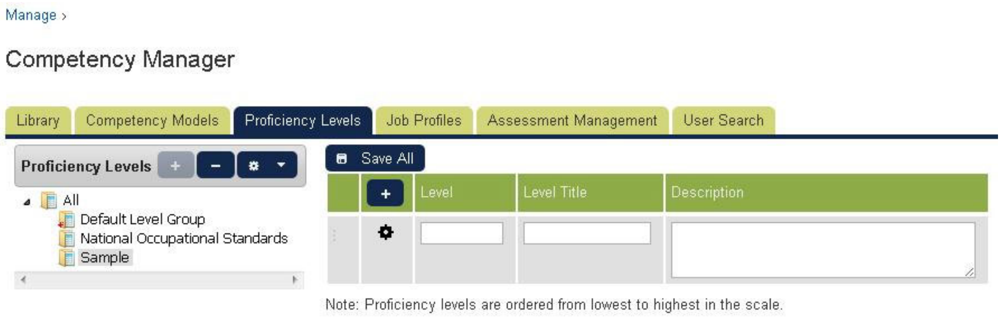
Note: The default proficiency level group must have at least one level therefore:

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

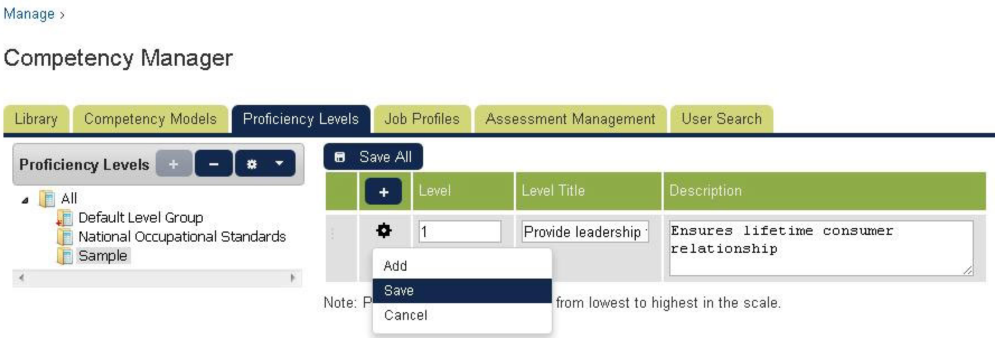
Adding a New Levels to the Proficiency Level Group

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

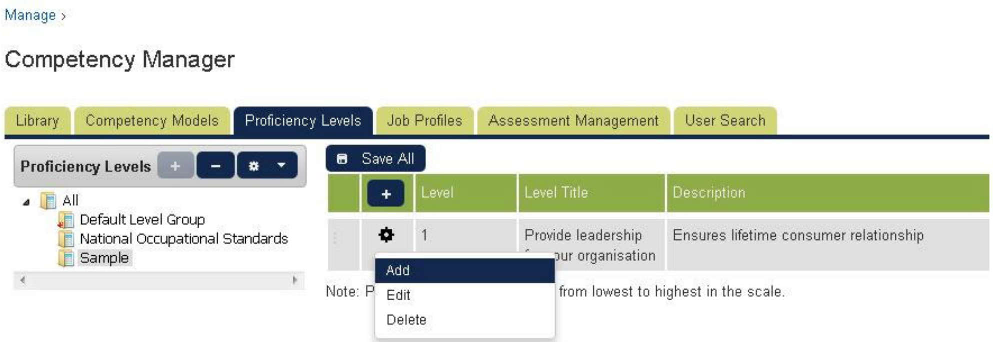
A new entry fields are displayed. Provide the required parameters.



Click the **Gear** icon and then select the **Save** button.

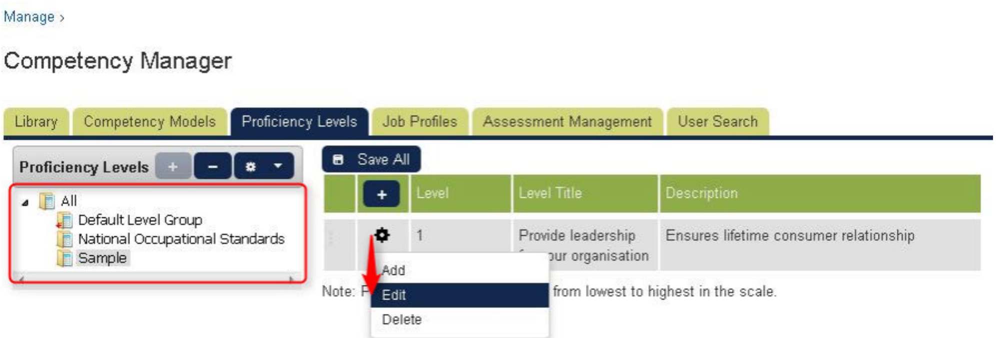


Note: To add another level, click the **Plus** sign link or click the **Tools** icon and then select **Add**



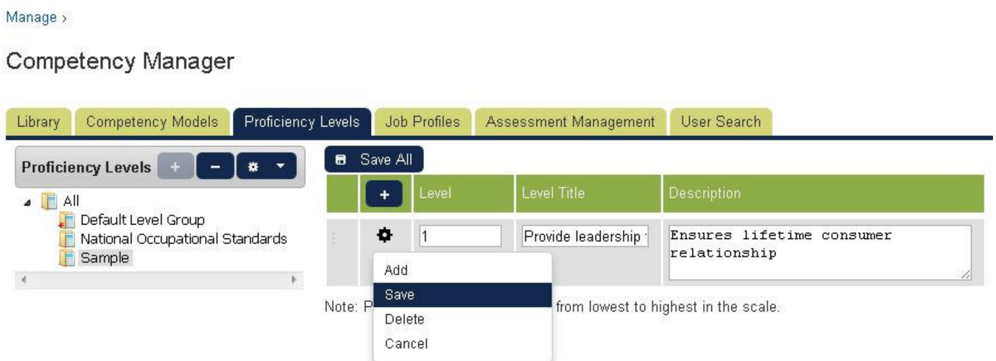
Editing a Proficiency Level

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



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

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



Permissions on Proficiency Level Scales

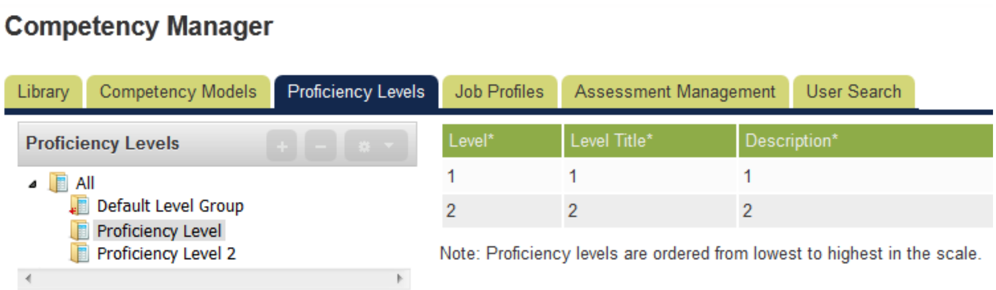
Permissions checking is available in the feature. Note that user actions will be restricted by privileges granted on the Proficiency Level Scales.

Read Permission

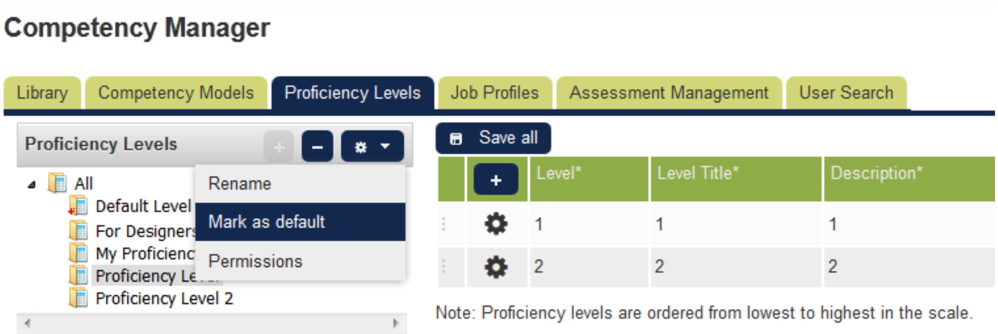
- View the detail of Proficiency Level Scales in Competency Manager > Proficiency Levels
- Selectable when add/edit Competency in Competency Manager > Competency Model

Unrestricted Permission

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



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



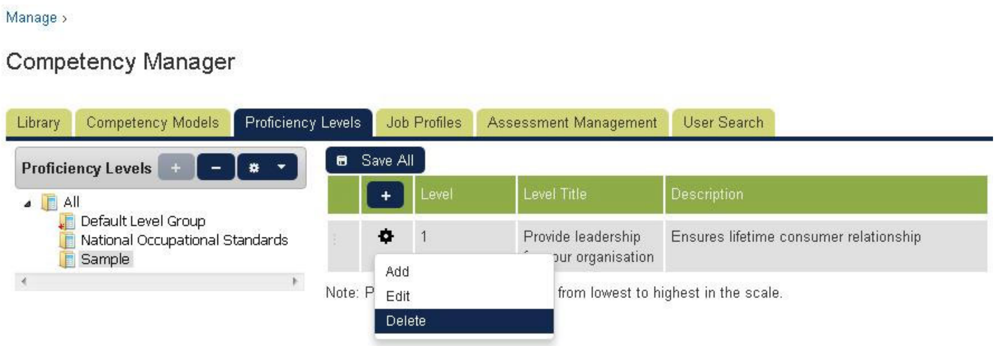
Log-in user with unrestricted permission can perform more actions

Note:

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

Deleting a Proficiency Level

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



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

Changing the Sequence Order of the Proficiency Level

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

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

Competencies

(available for Performance and Learning only)

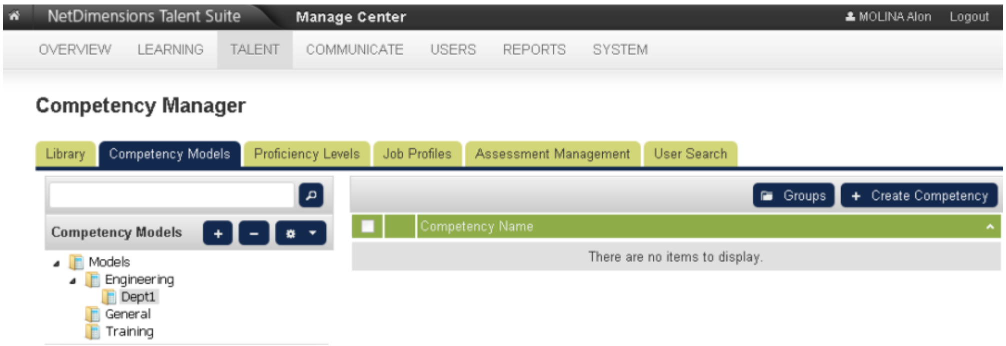
This section details the procedures and functionalities of the Competency Models tab on the Competency Manager. On Competency Models tab, user can do the following tasks:

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

Competency Models

Viewing the Competency Model Categories

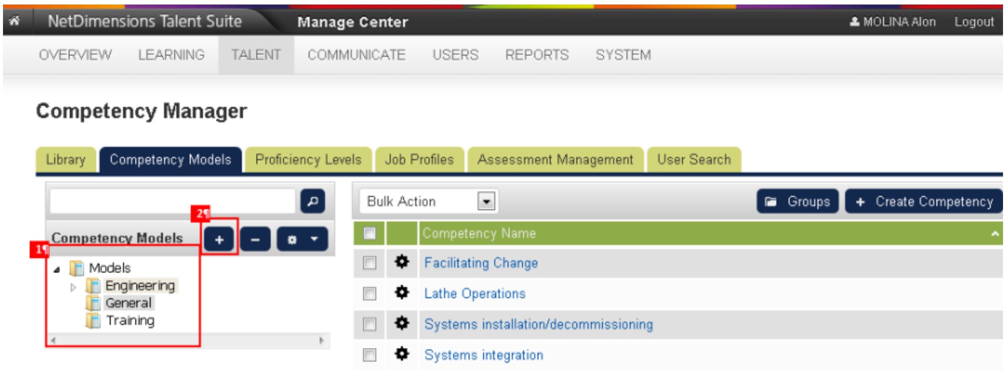
Competency models are presented in a hierarchical view. A competency model can be expanded to reveal the sub competency model, if any exist, and collapsed to hide the sub competency model



Creating a Competency Model Category

To add a new competency model category:

1. Using the competency model hierarchical view, select the model where the new competency model will be added.
2. Click the **Add** button.

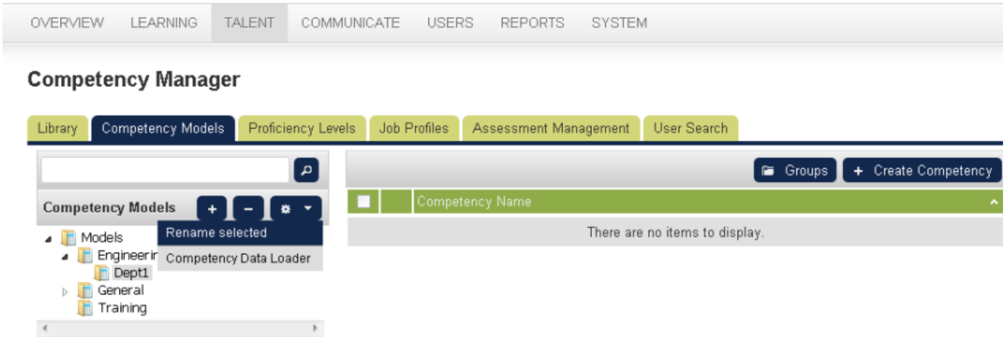


A text box will be displayed. Enter the name of the new competency model and then press **Enter**.

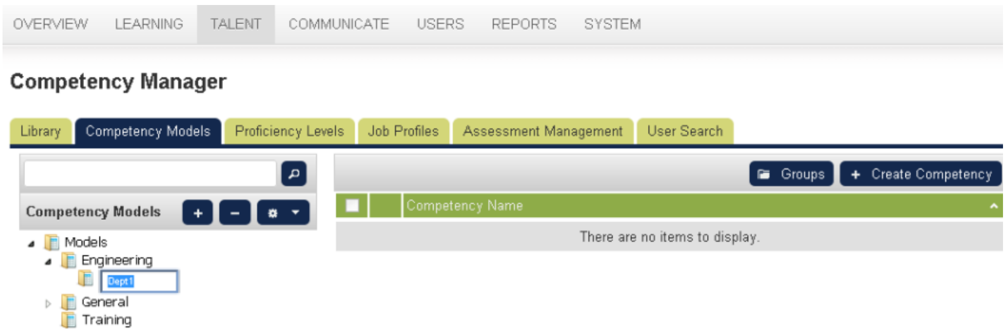
The new competency model would be added.

Renaming a Competency Model

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

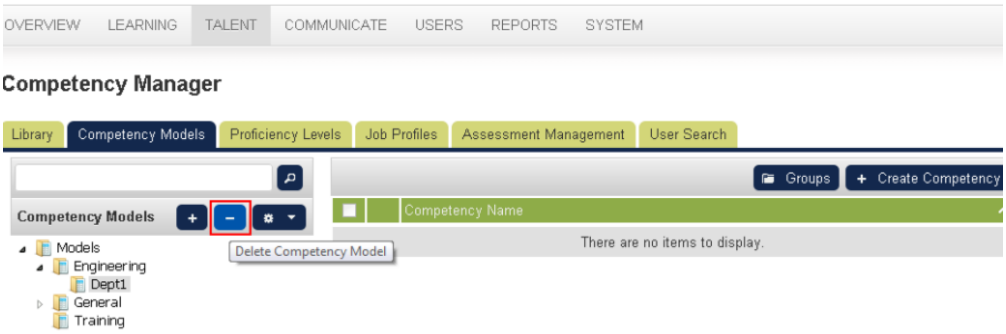


The selected competency model will be editable. Rename the competency model and then press **Enter** .



Deleting a Competency Model

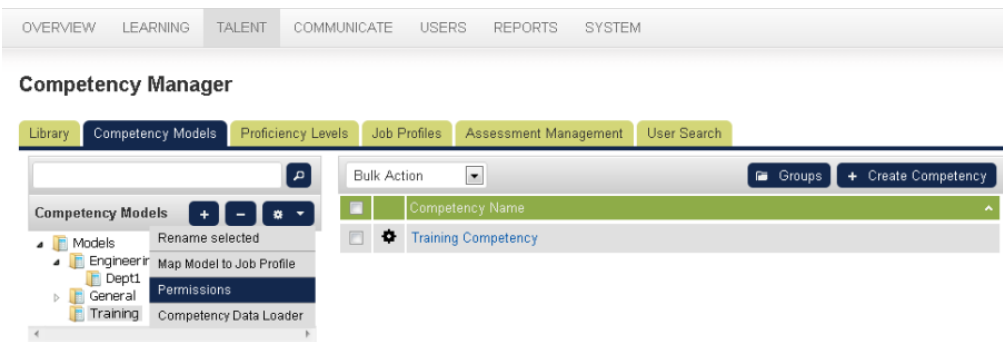
Select the competency model you want to remove. Click the **Delete Competency Model**.



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

Setting Permissions on a Competency Model

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



On the permission selector you can set the following:

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

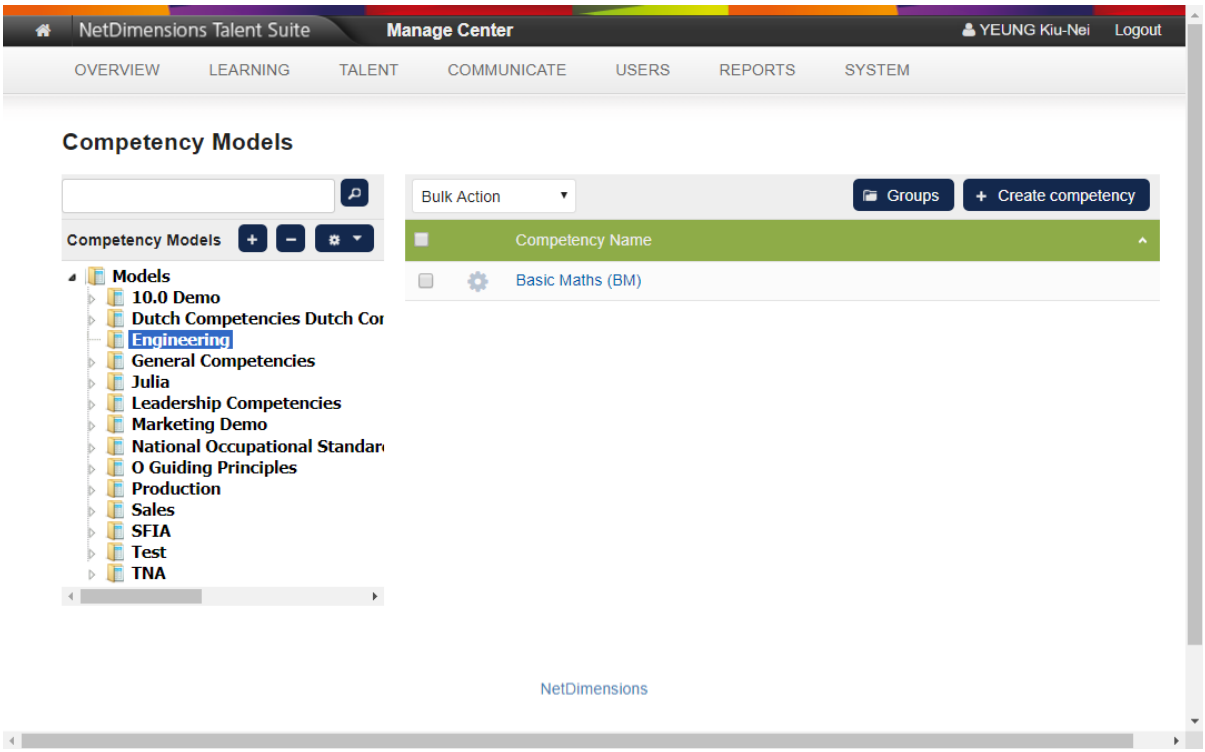
  Note: For every selected criterion, a criterion box will be displayed. To select a specific user, group or organization that belongs to the criteria, click the link positioned at the right top of each box.

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

Competencies

Creating a Competency

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

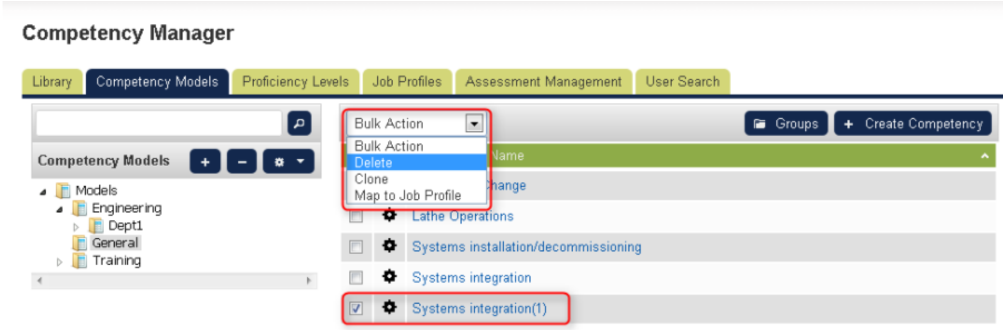


Please refer to the Sub-sections "*The Details Tab*" and "*The User Review Tab*" under "*Editing*

Competencies" in this document regarding configuring the Competency Model.

Removing a Competency

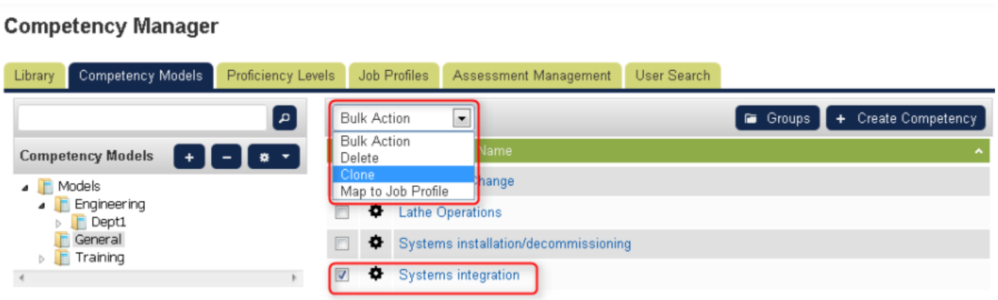
To remove a competency from a model: Under the list of competency, tick the box of the competency you want to remove. Click the **Bulk Action** button and then select **Delete**.



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

Cloning a Competency

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



Editing a Competency

To open a Competency for editing:

1. Select the model associated with the Competency to be edited.
2. On the right side of the screen, either click the Competency Name directly, or click the Cog icon  and then select **Edit competency** from the menu.

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

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

The Competency Settings are categorized into the following sections:

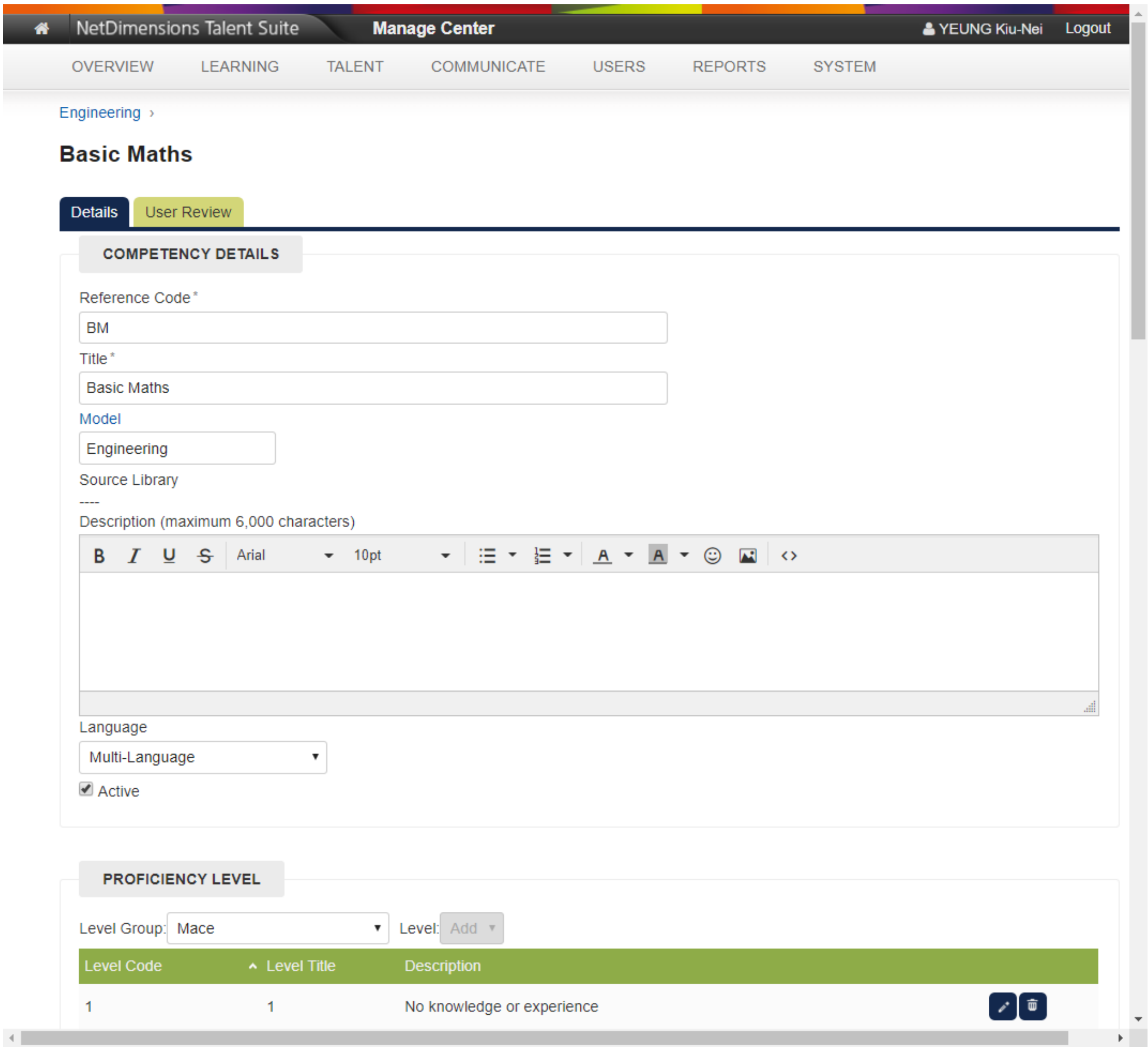
- Competency Details
- Proficiency Level
- Recognition Policy
- Learning Modules
- Notification Settings
- Job Profiles

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

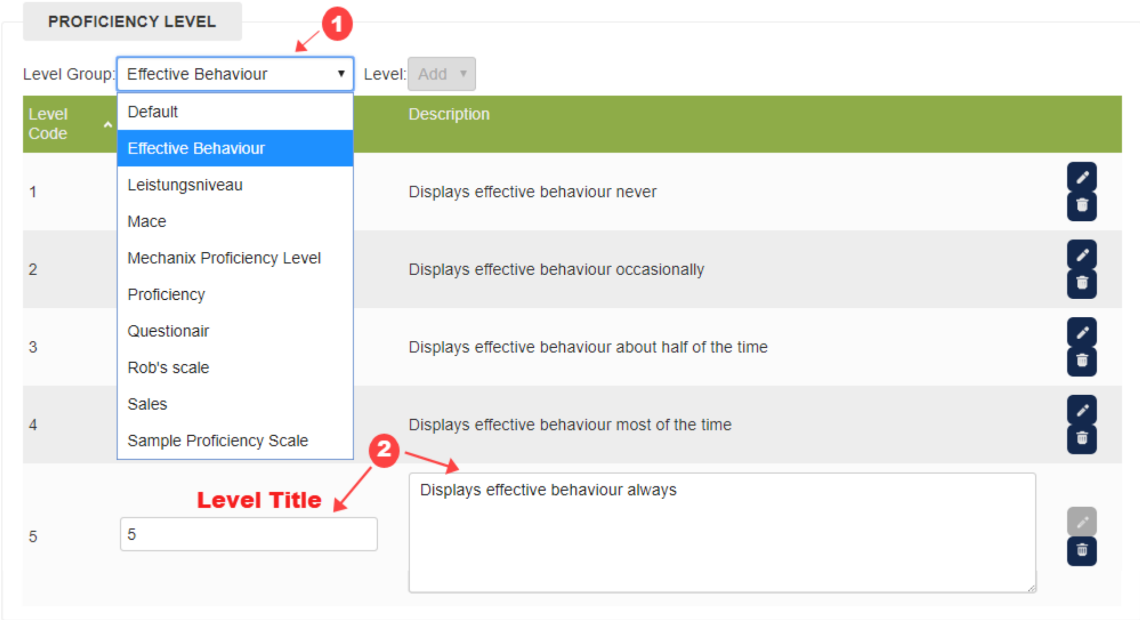
Competency Details

You can specify the following properties for each Competency:

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



Proficiency Level



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

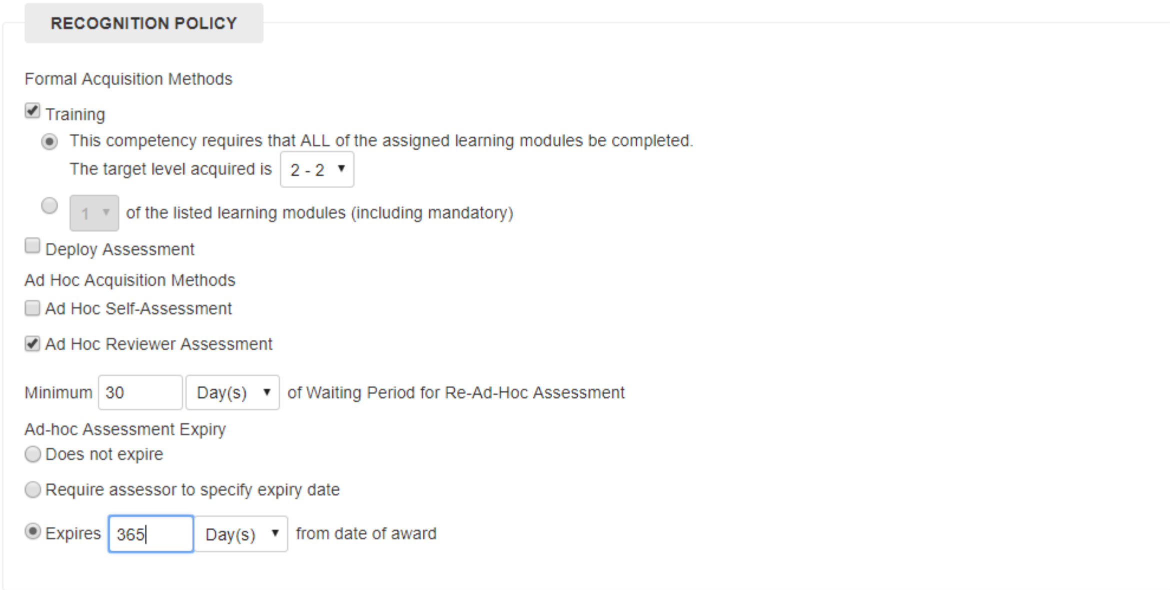
1. Specify which Proficiency Level Scale is appropriate for this Competency
2. Customize the Level Titles and Descriptions for the Competency
3. Add/Remove individual levels as necessary for the competency

Recognition Policy

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

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

These should be checked as necessary for the Competency:



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

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

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

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

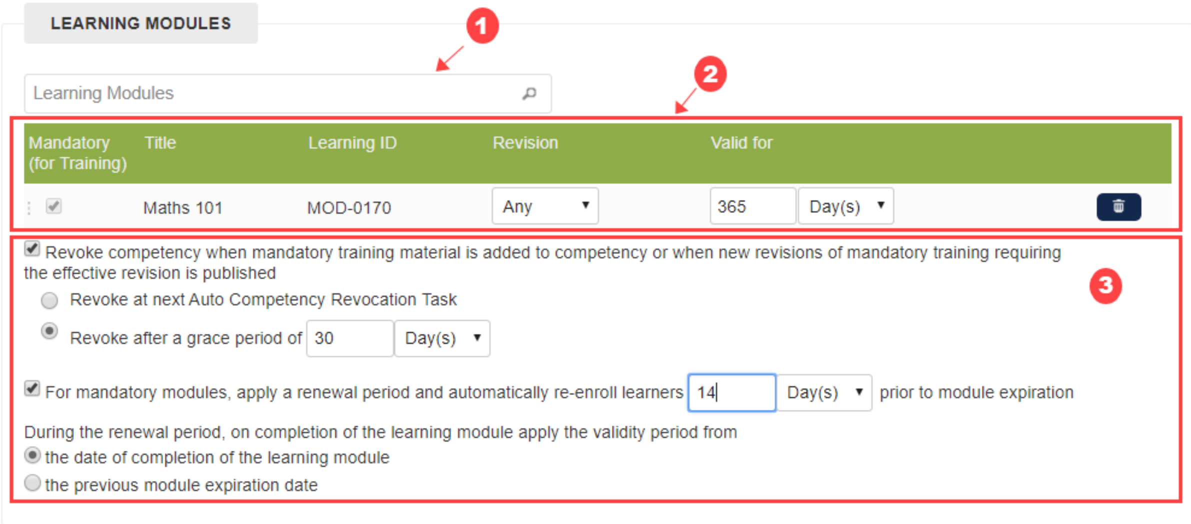
Learning Modules

In this section, you can

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

Competency Revocation Settings

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



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

To enforce the above:

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

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

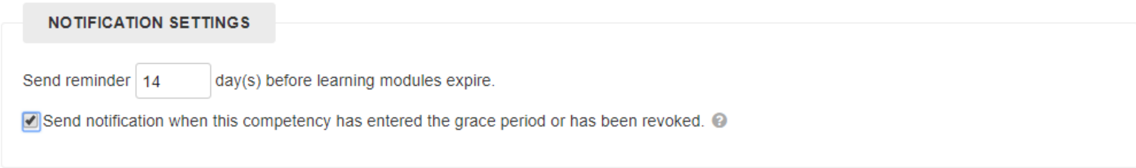
1. Set **For mandatory modules, apply a renewal period and automatically re-enroll learners 30 Day(s) prior to module expiration**
2. If the learner retakes the training during the renewal period, you can opt to calculate the new Validity Period based on
   - **the date of completion of the learning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

> **Renewals & Expiration/Revocation Notifications for Currently Assigned Job Profiles only**
> The **Process competency renewals and expiration/revocation notifications only for currently assigned job profiles** Setting under System Configuration > Competency Manager determines if learners are only sent competency related notifications relevant to their currently assigned job profiles.
>
> - When checked, only those notifications of the competencies that are part of a job profile currently assigned to the learners will be sent. Also, enrollment renewals will only be performed for modules related to these competencies.
> - When unchecked, these notifications will be sent as long as the learners have the competencies. Enrollment renewals for competencies will be performed irrespective of the currently assigned job profiles.

Notification Settings

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

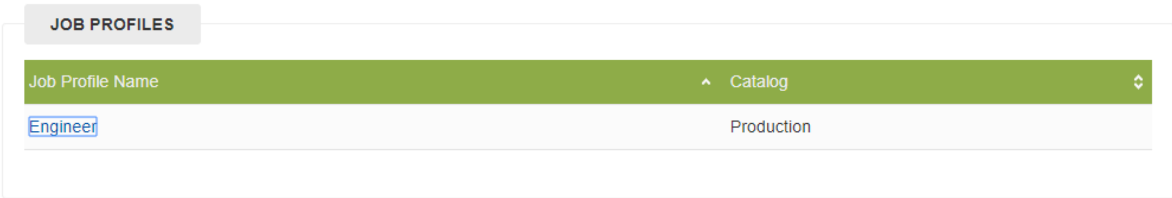
- **Send reminder ____ day(s) before learning modules expire.**: If a notification email is to be sent to the Learners before the learning modules expire; enter the number of day(s) into the text box.
- **Send notification when this competency has entered the grace period or has been revoke d.**: Check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



Job Profiles

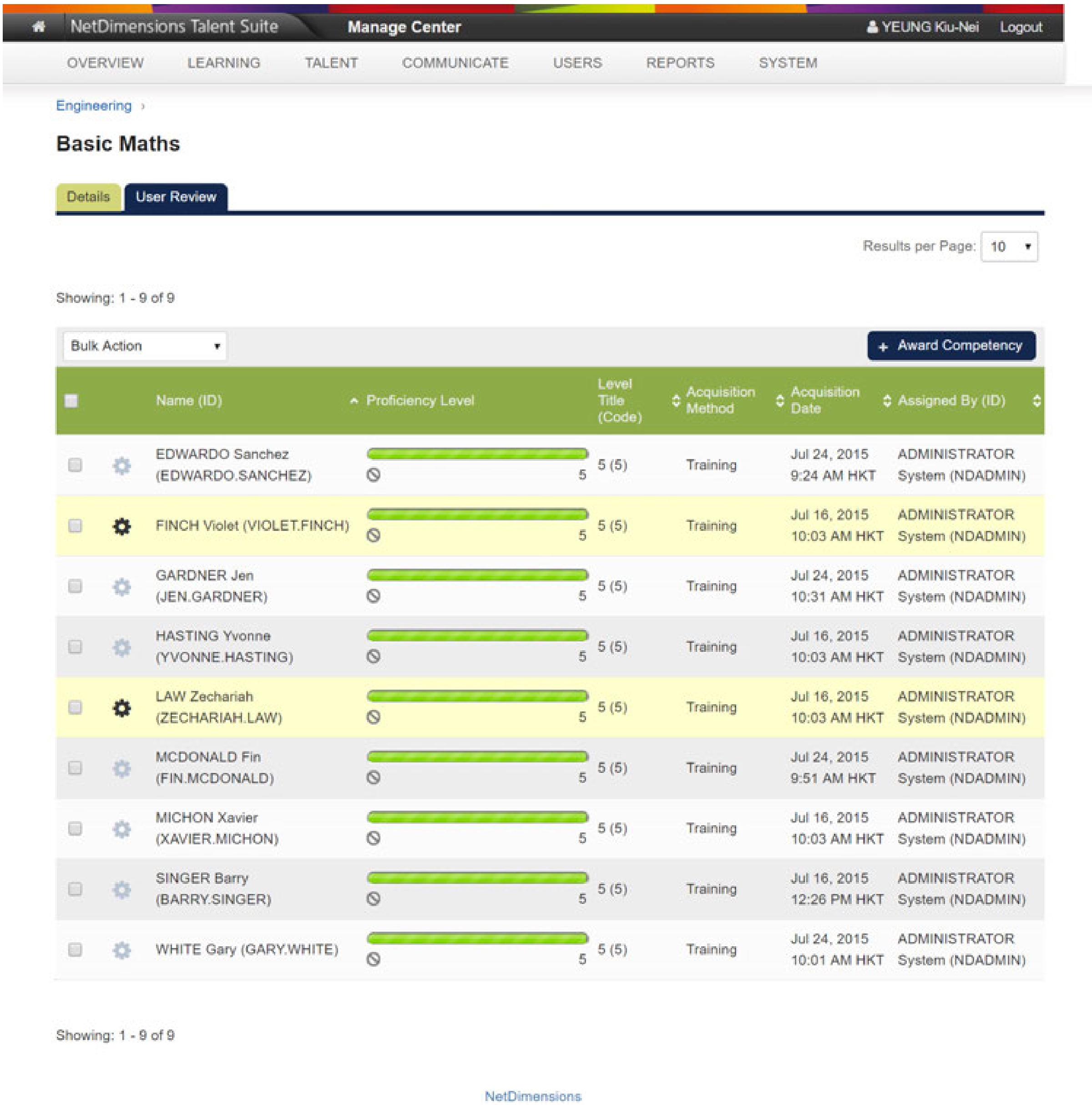
The Job Profile(s) mapped to the Competency are listed in this Section.

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



Edit Competency User Review

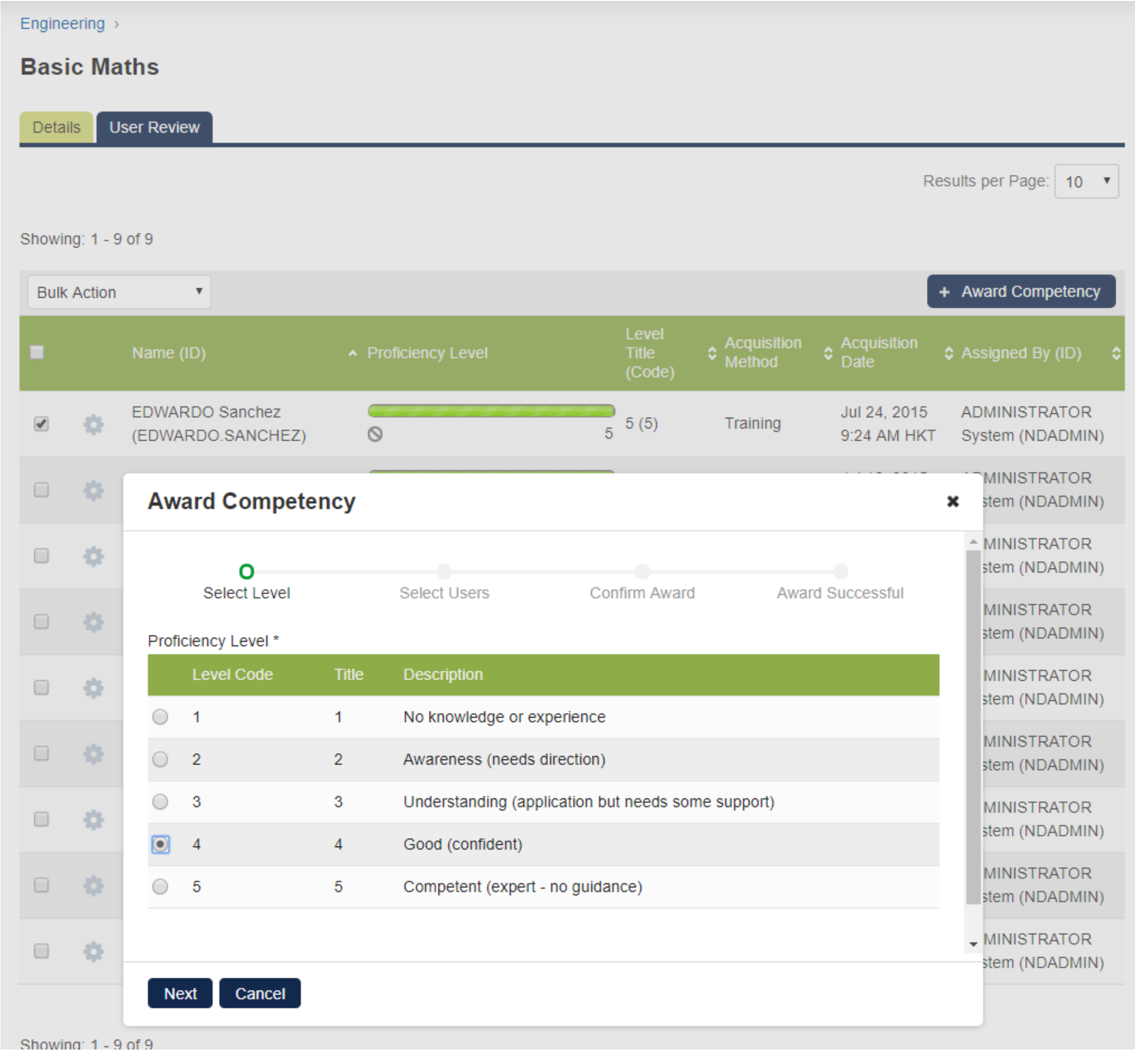
This Tab lists the Learners awarded with the selected competency.



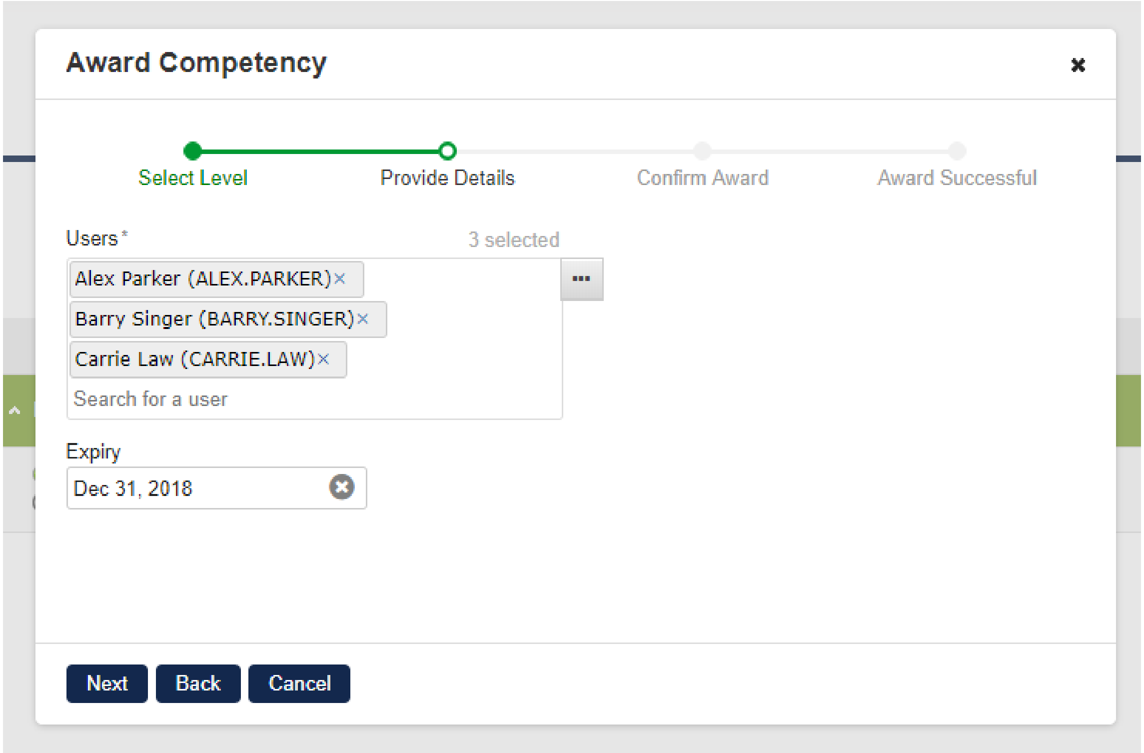
Awarding the Competency

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

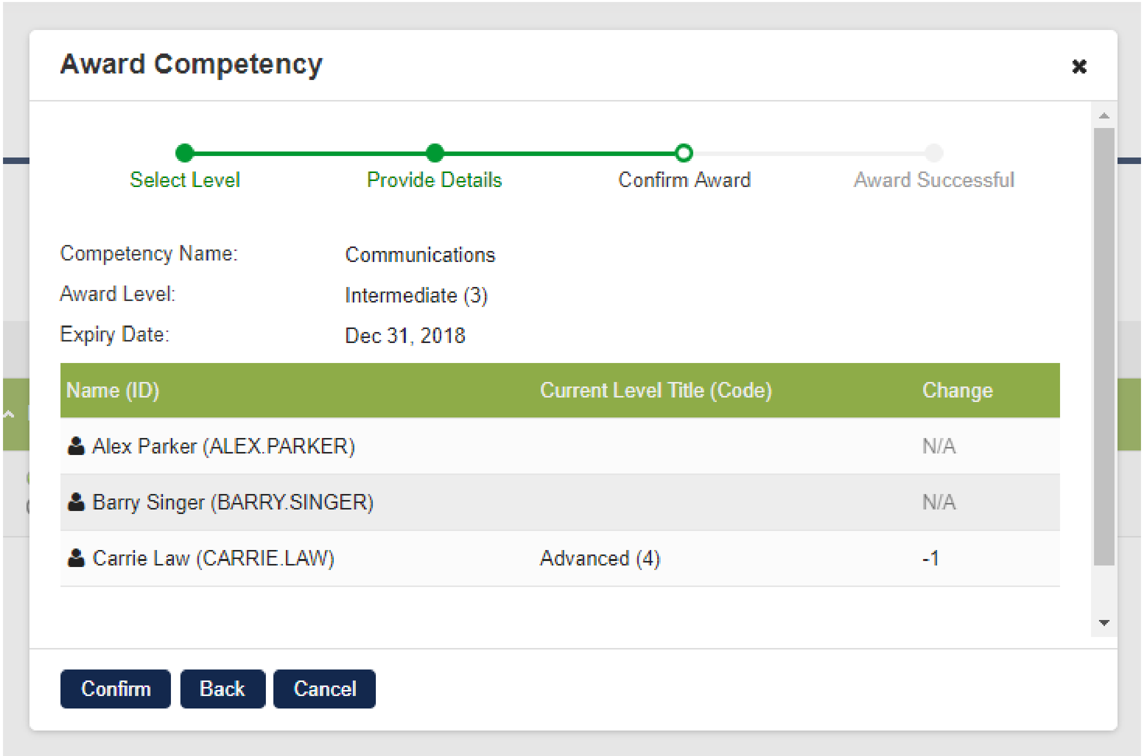
1. In the first step, select the **Proficiency Level** to be awarded then click **Next**.



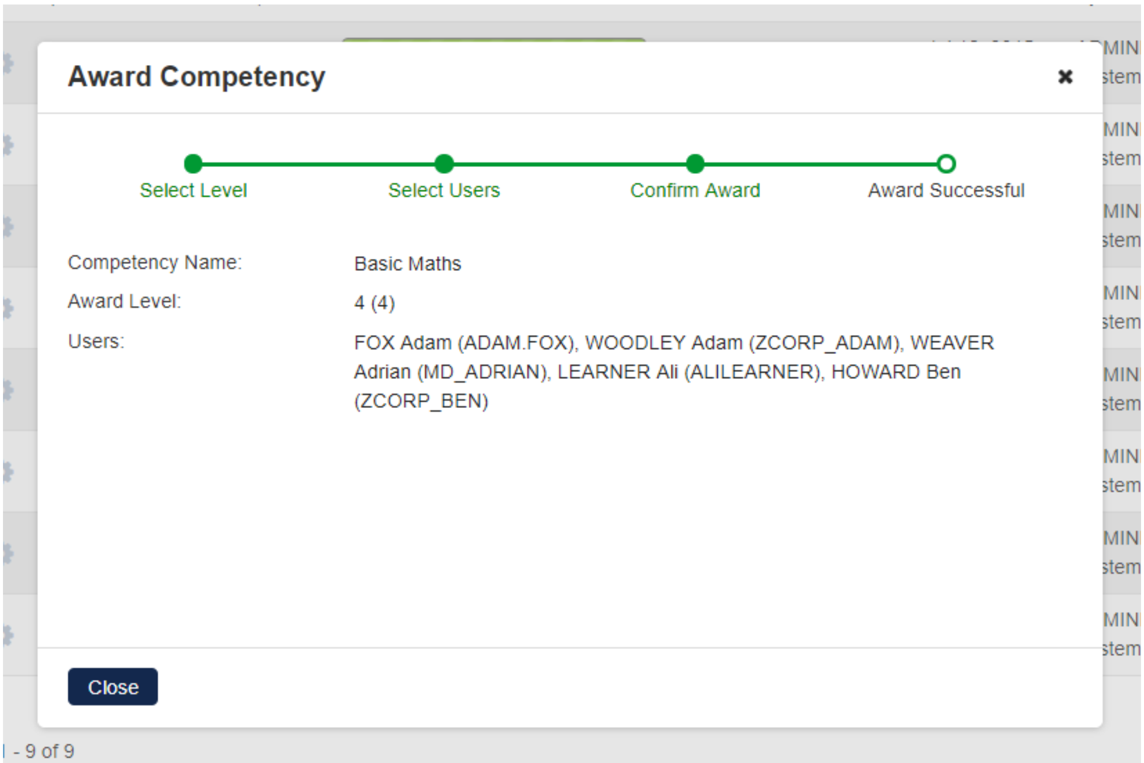
2. In the **Provide Details** Step, select the Learners using the inline or advanced user selector then, optionally provide an expiry date, click **Next**.



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

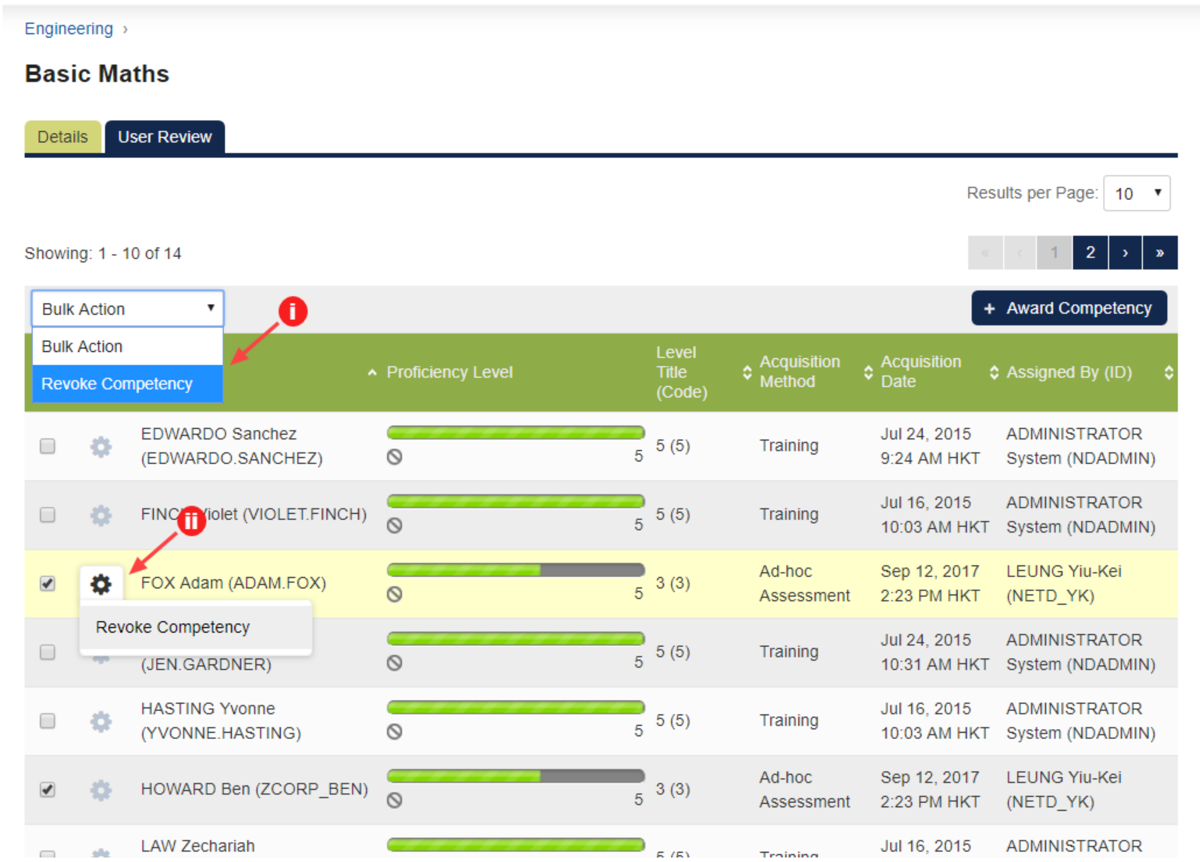


4. In the **Award Successful** Step, a summary of the awards will be displayed.



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

Revoking the Competency



To revoke the Competency:

1. First, check the Learner(s) that the Competency needs to be revoked: either
   i. Select **Revoke Competency** from the **Bulk Action** Drop-down List (Applicable to multiple learners); or
   ii. Click the Cog icon and then select **Revoke Competency** from the menu (Applicable only to the checked learner next to the Cog icon).
2. A **Confirm** Window will be launched. Click **OK** to confirm. The Name List for this Competency will be updated accordingly.

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

Competency Data Loader

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

SFIA Library

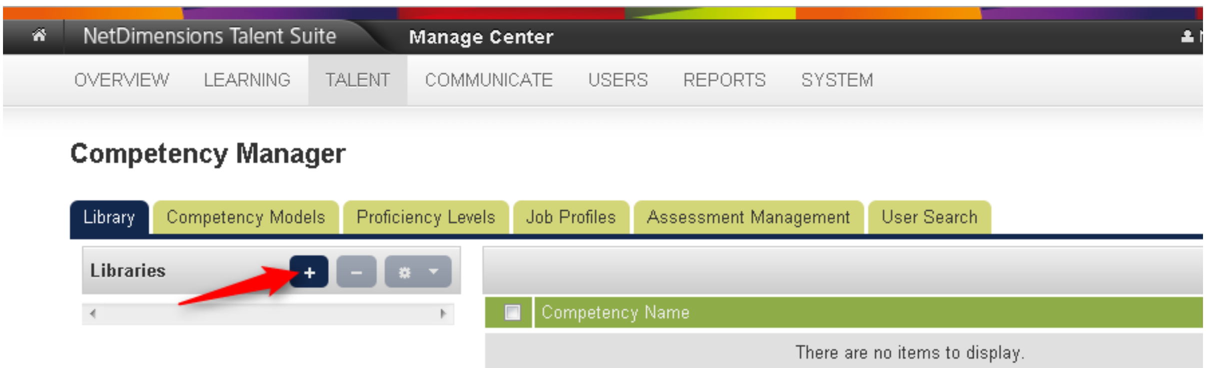
(available for Performance only)

Skills Framework for the Information Age (SFIA) assists in evaluating employees skills and competencies. You can import skills defined in the SFIA up to version 5, presented in categories and subcategories. The SFIA library functions can be accessed at **Manage Center** > **TALENT** > **COMPETENCY MANAGER** > **Library.** On the Library tab, you can do the following tasks:

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

Importing the SFIA Library

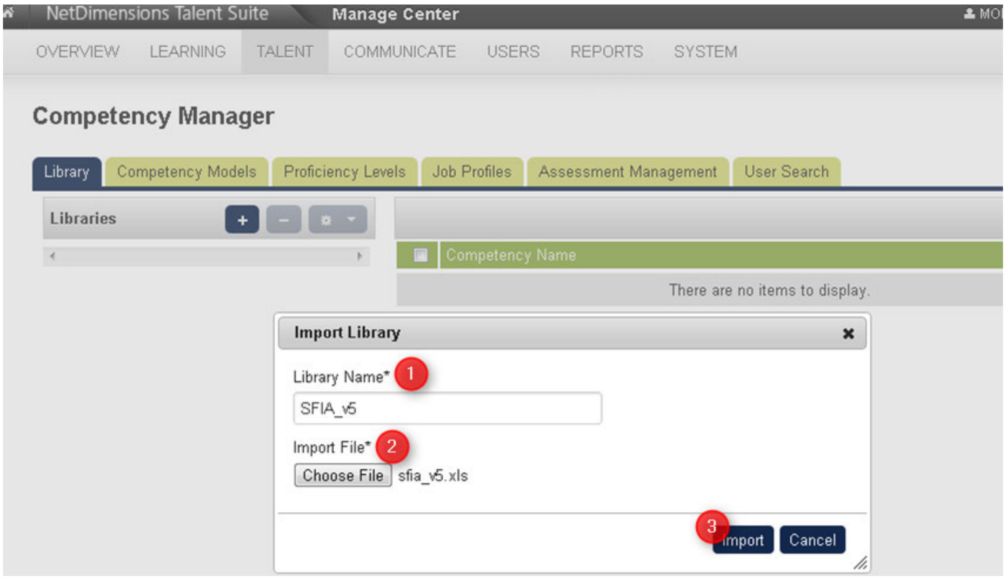
To import the SFIA library, click "+" icon



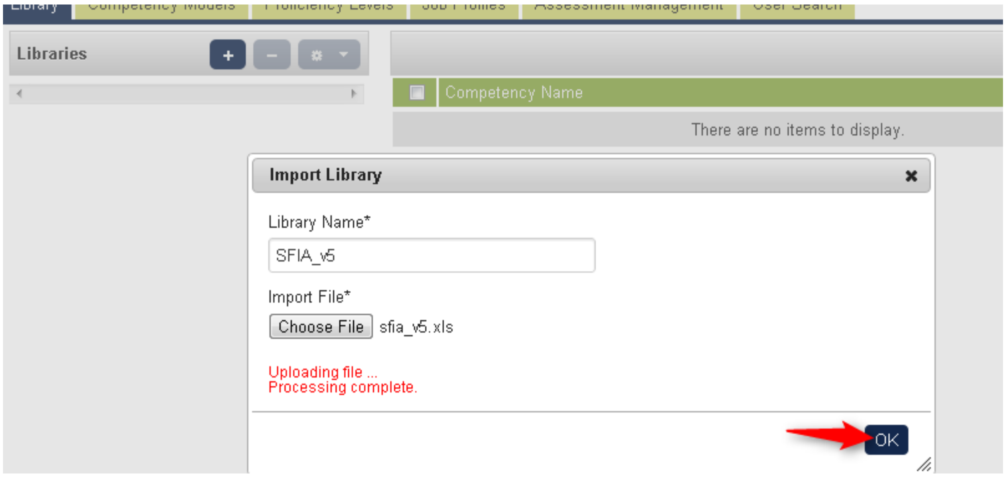
This opens the *Import Library* dialog box.

1. Enter the assign name for the dictionary.
2. Click the **Choose File** button to select the file to be imported.

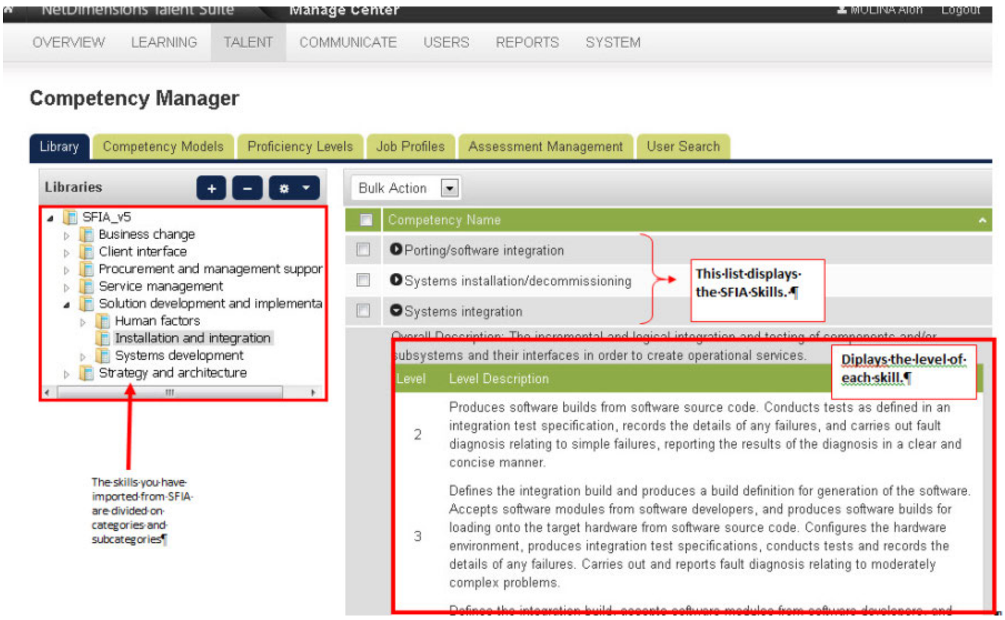
3. Click **Import** to start the import process.



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



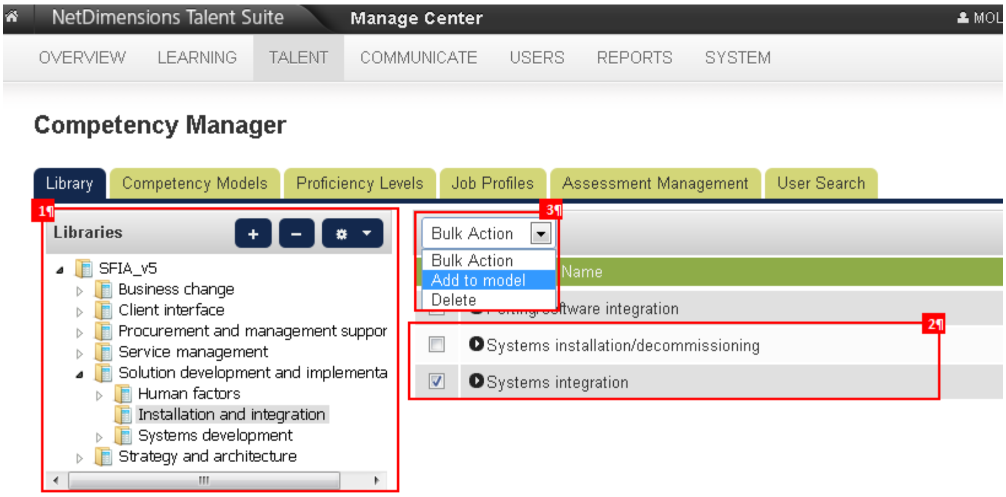
The SFIA Skills are now downloaded to the competency manager library.



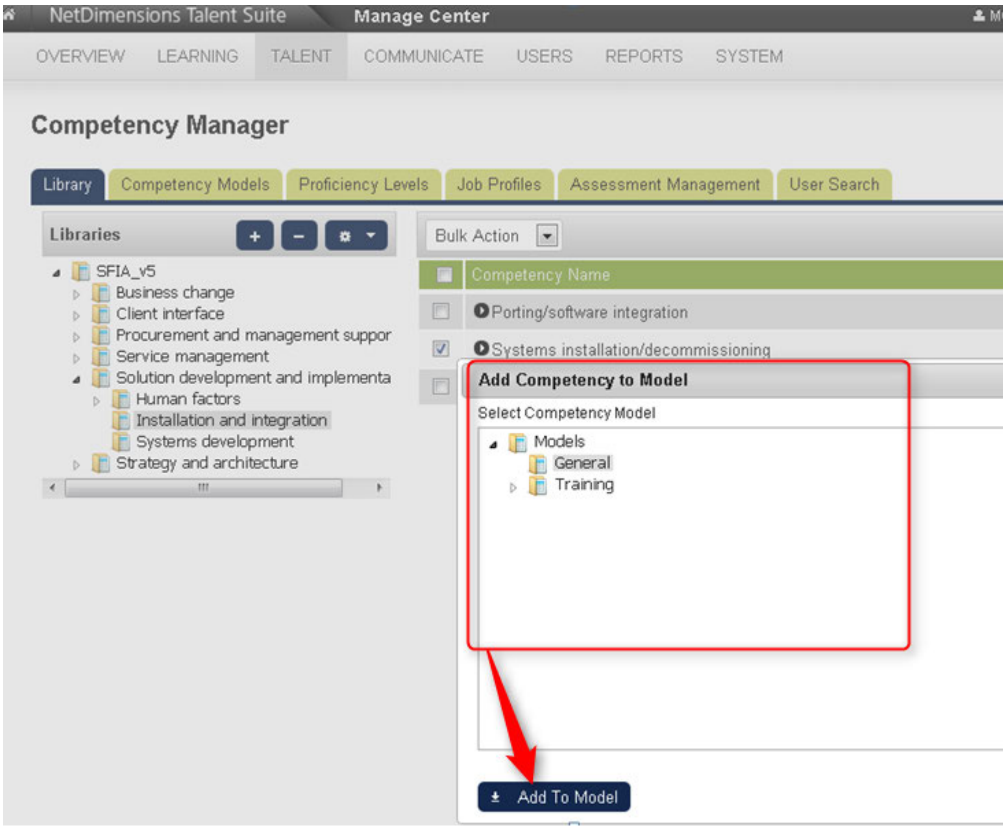
Associating SFIA 5 Skills with a Competency Model

To associate SFIA skills with a competency model:

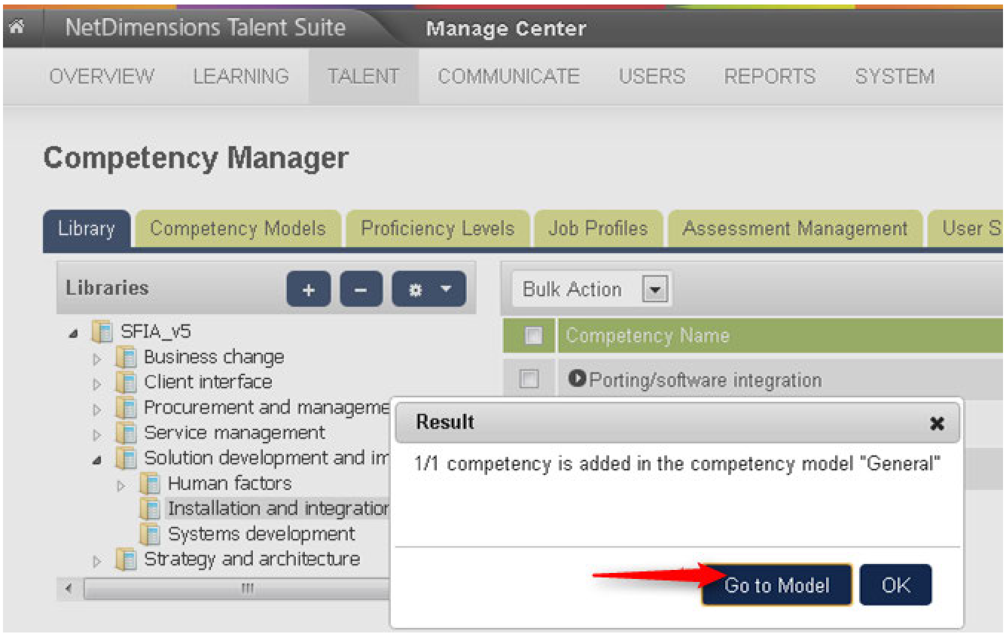
1. Select the category where the SFIA skill is associated.
2. Tick the box of the SFIA skill that will be added to the competency model.
3. Click the **Bulk Action** drop down button and then select **Add to model**.



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



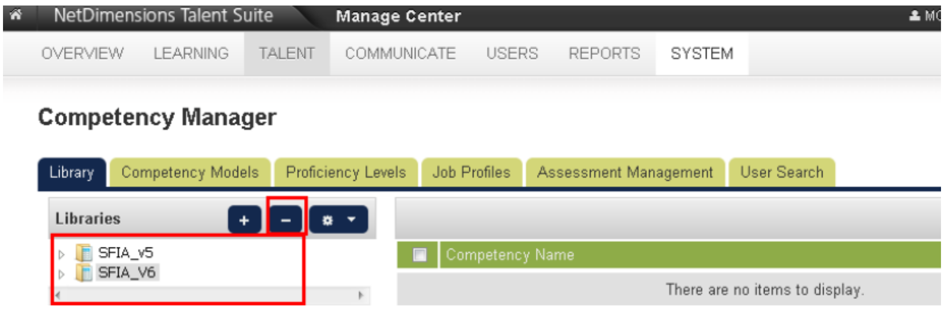
A message will be displayed on the screen. Click the **Go to Model** button to display the competency model, otherwise click **OK** to stay on the *Library* tab.



Removing an SFIA Library

To remove an imported SFIA Library,

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



4. Confirm to delete.

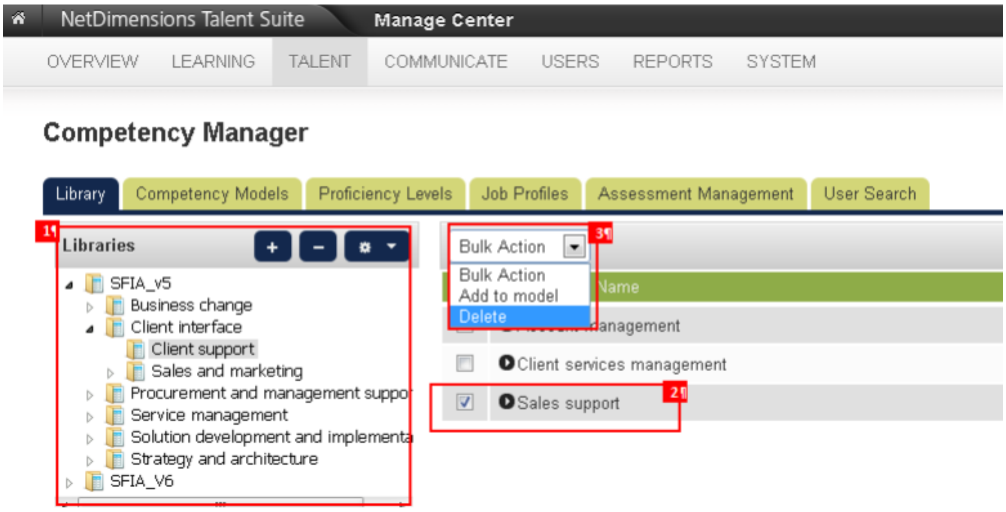
Removing a Competency under the SFIA Library

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

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

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

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



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

Job Profiles

(available for Performance and Learning only)

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

- Maintain the Job Profile Catalog
- Maintain the Job Profile

Job Profile Catalog

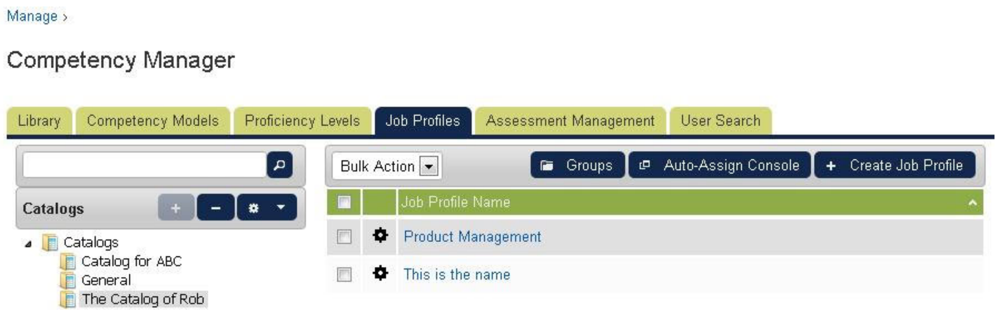
A huge number of job profiles can easily be managed if they are segregated according to their category. Like for an instance, you can place all job profiles related to HR into one category. Through this segregation, a user can easily track the job profile.

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

Creating a Job Profile Catalog

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

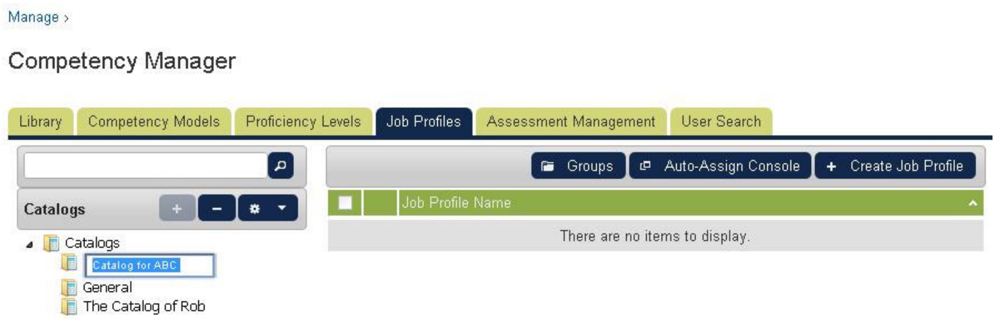
A confirmation box is displayed. The new catalog will be added on the Catalog Hierarchical Tree.



Renaming a Job Profile Catalog

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

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

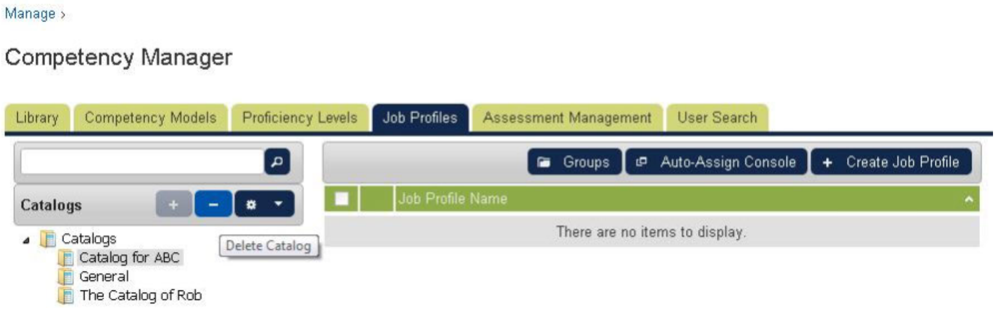


Setting Permission on a Job Profile Catalog

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

Removing a Job Profile Catalog

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

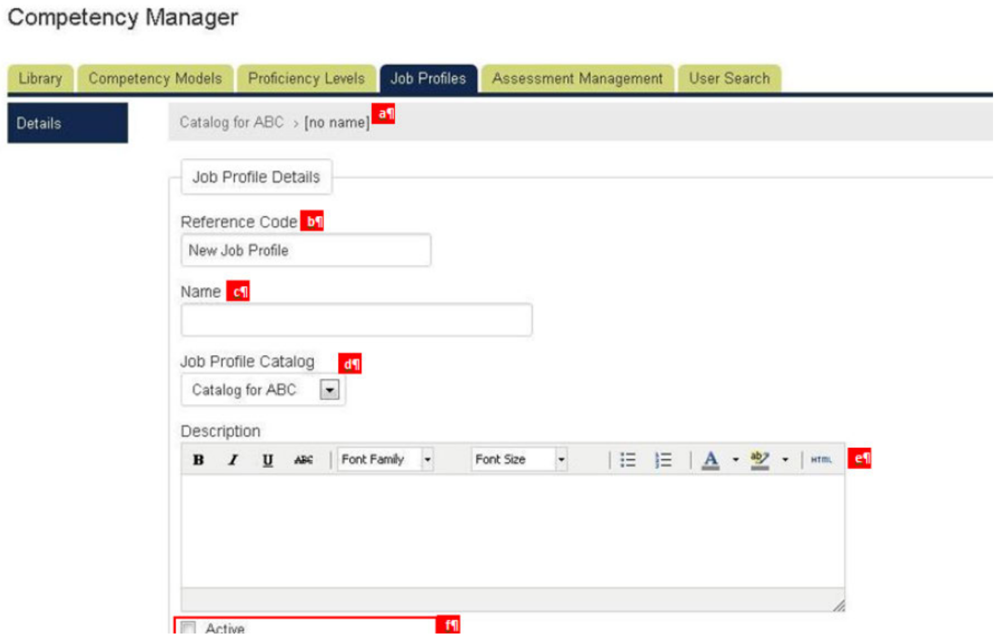


A confirmation message will be displayed, click **OK** to remove the selected catalog, otherwise, click the **Cancel** button to cancel the deletion of the catalog.

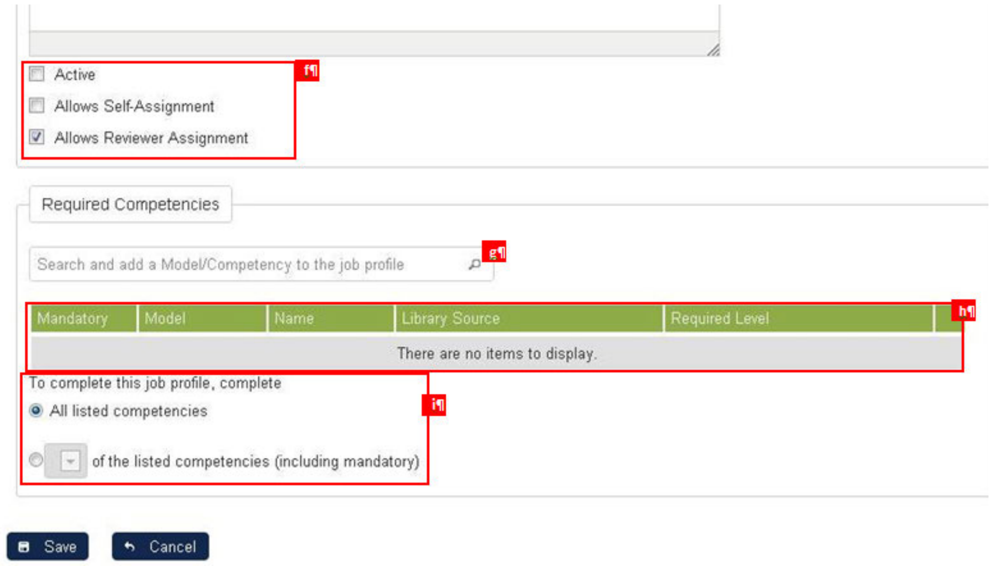
Adding a Job Profile on a Job Profile Catalog

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

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



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



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

- Active
- Self-Assigned
- Review-assignment

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

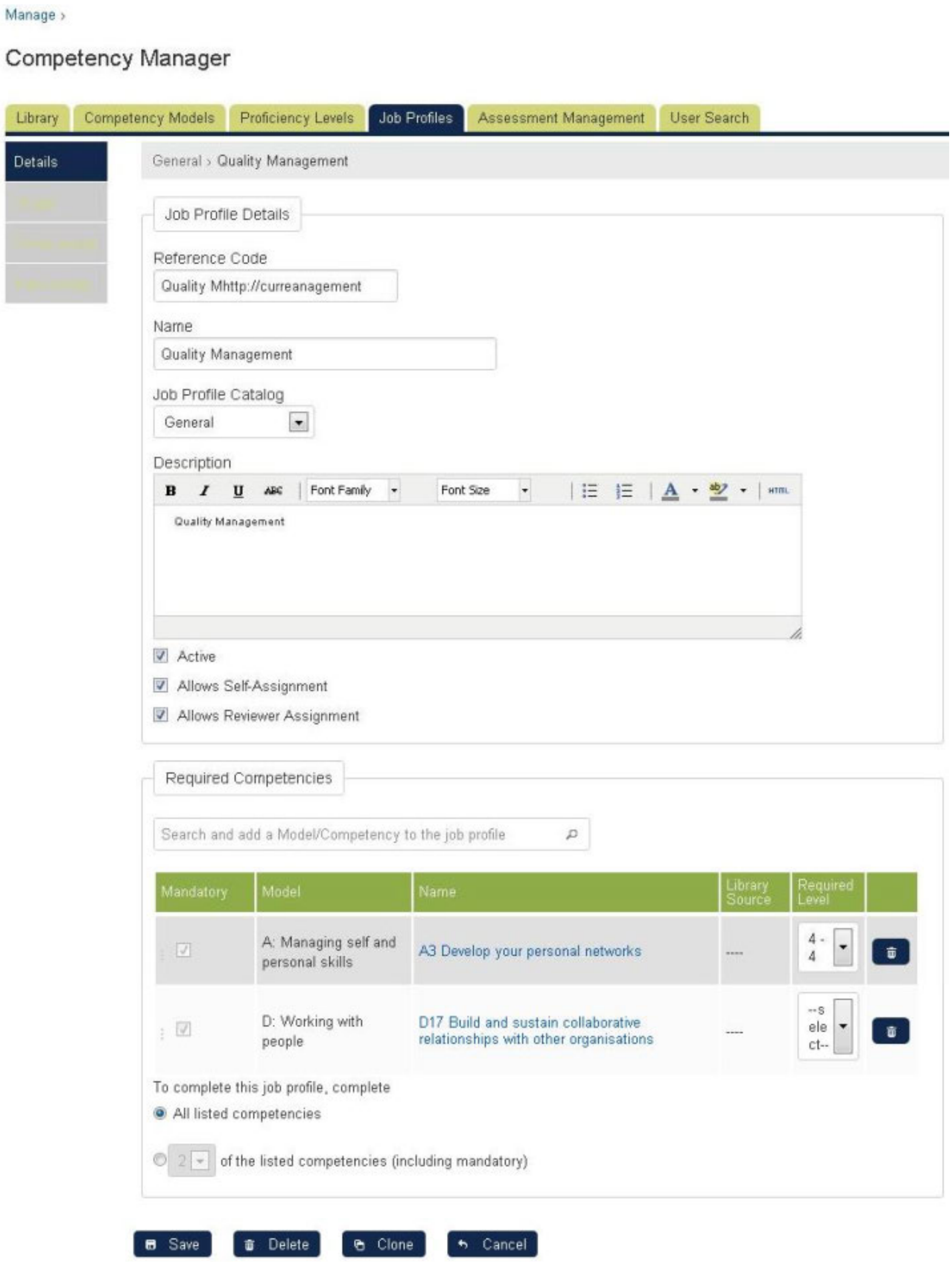
I. Tick the box of the selected competency model to indicate that the corresponding competency is mandatory.

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

Editing the Job Profile Details

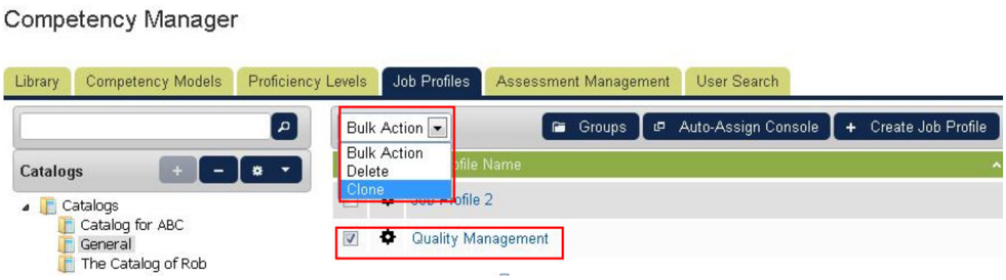
To modify the details of the job profiles, select the catalog where the job profile is associated. The list of available job profile will be displayed. Click the **Gears** icon of the job profile you want to modify and then select **Edit Job Profile** or click the job profile name.

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

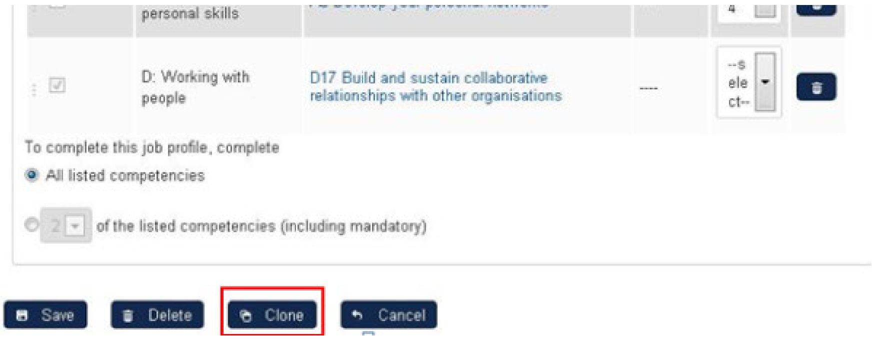


Cloning a Job Profile

This section teaches you the procedure on how to clone a job profile. Select the catalog where the job profile is associated. The list of available job profile will be displayed.
Tick the job profile you want to clone. Click the **Bulk Action** drop down button and then select **Clone**.

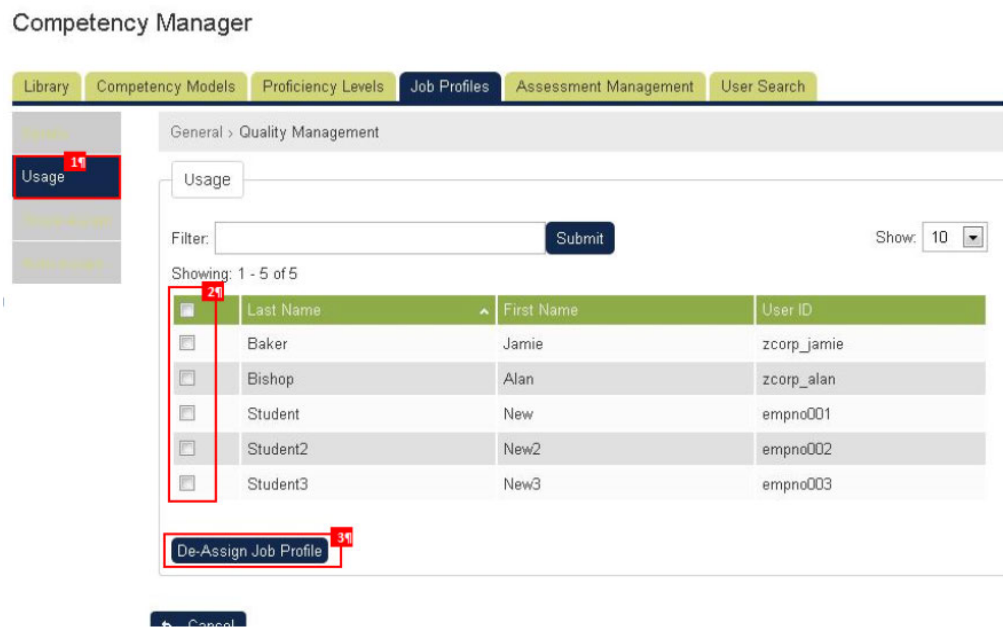


Note: You can also clone a job profile by clicking the **Clone** button on the Job Profile details.



De-assigning Learner to a Job Profile

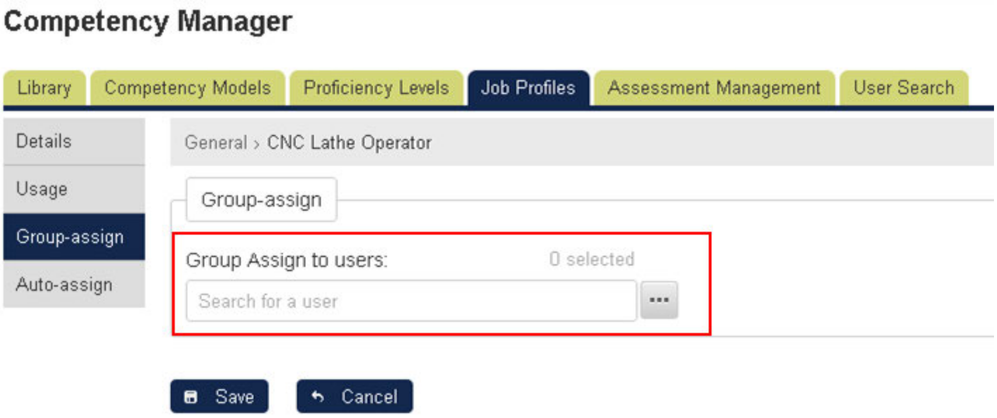
1. From the job profiles editor, click the **Usage** button.
2. Tick the box of the learner you want to de-assign to the job profile.
3. Click the **De-Assign Job Profile**.



Assigning a Learner or Group of Learners to a Job Profile

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

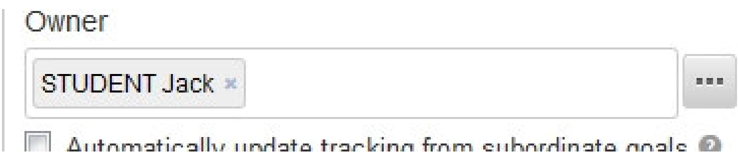
From the job profiles editor, click the **Group-assign** button. Click the **Select User(s)** link to select the the group of users.



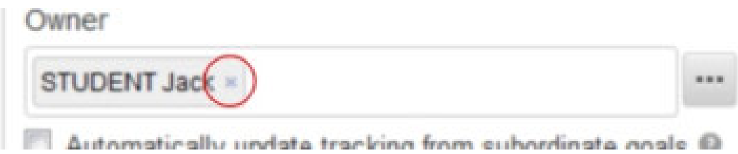
Note:

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

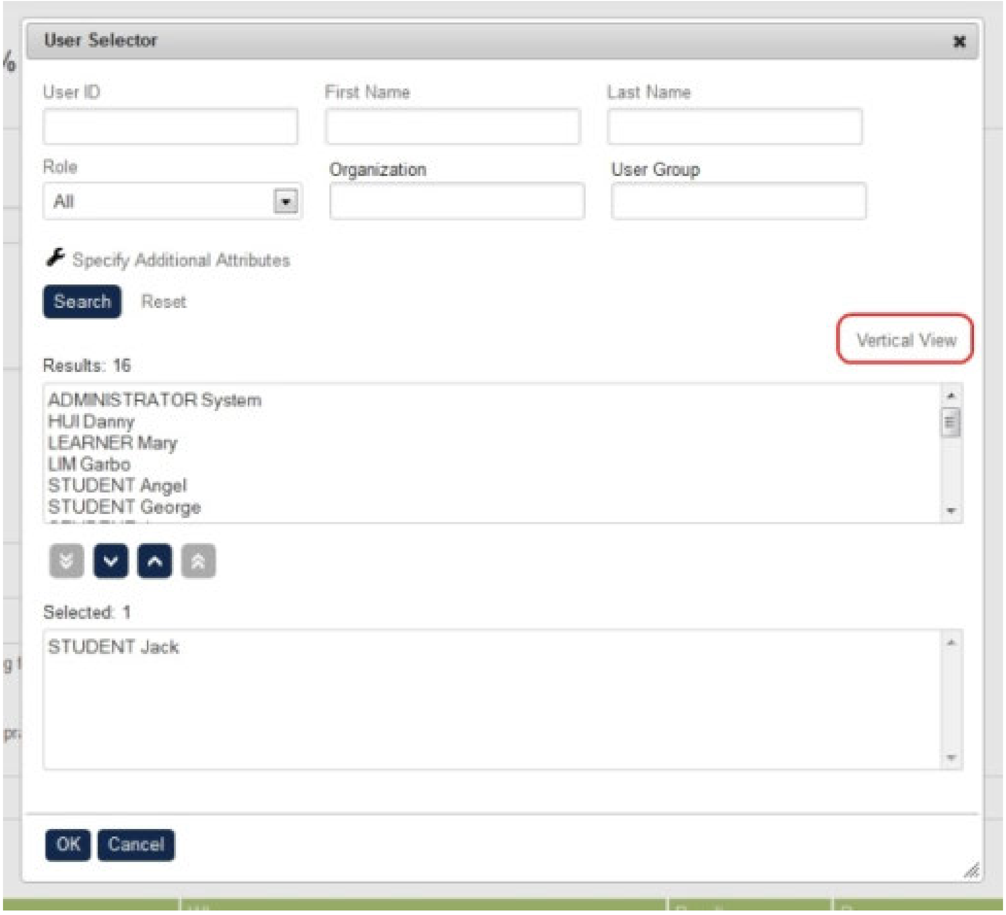
- The user can choose from one of the results before the keyword is complete. Then, the selection will be shown as a token within the user selector box.



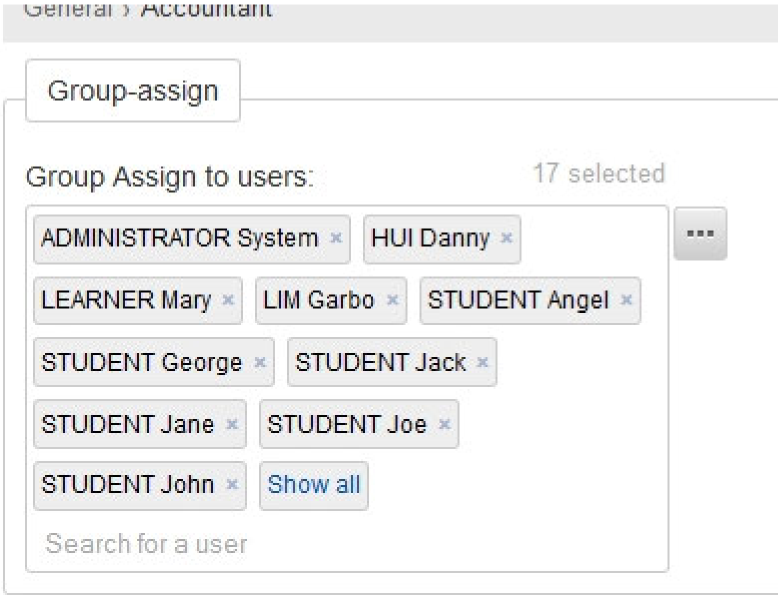
- The user can remove any user selection with the cross on the right-hand side.



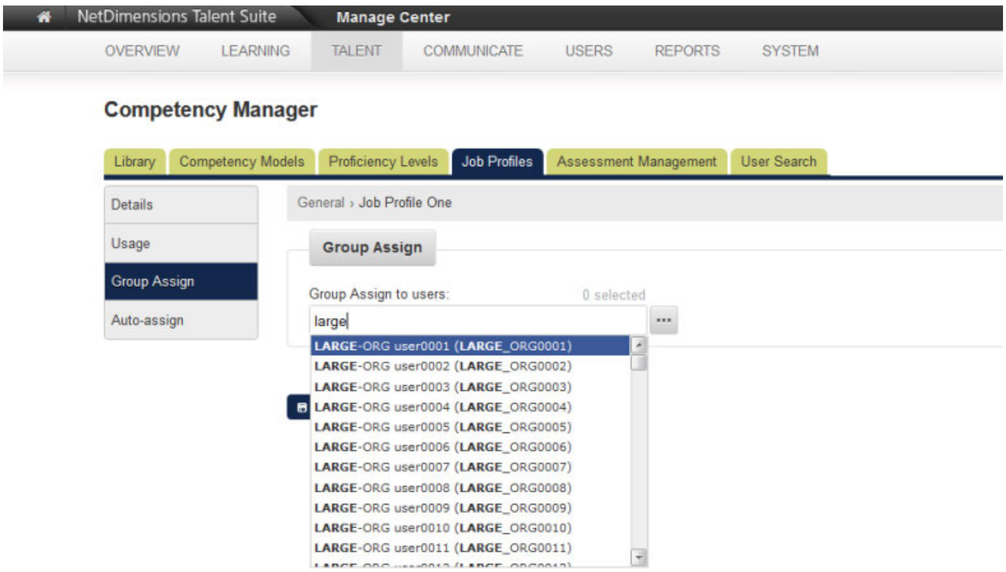
- To open the advanced search interface, the user can click the "..." box beside the quick search box. This opens the menu for selecting the learners.



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



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



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

Auto-Assigning Group Users to the Job Profile

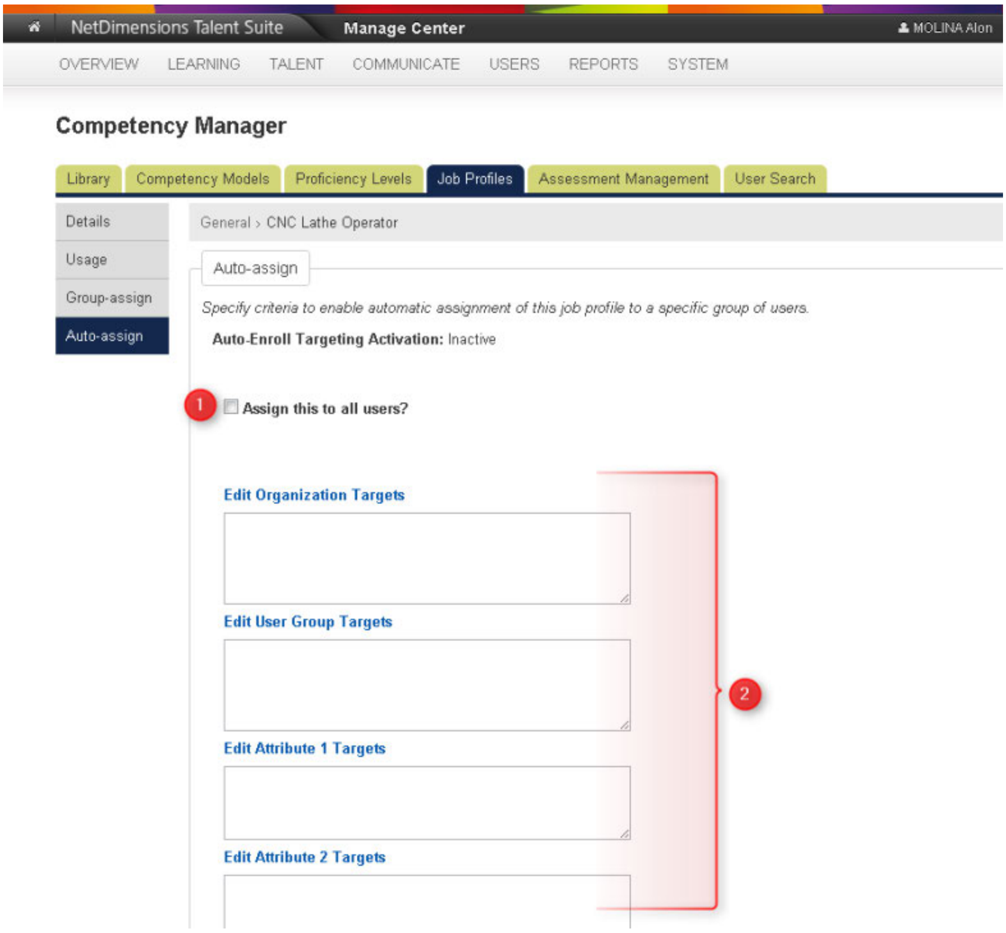
Allows the automatic assignment of job profiles based on targeting criteria. To do this, on the job profile details, click the **Auto-assign**.

1. Tick this box if you want to automatically assign the job profile to all users.
2. Specify the criteria to enable the automatic assignment to the job profile. Criteria can be filtered into the following:

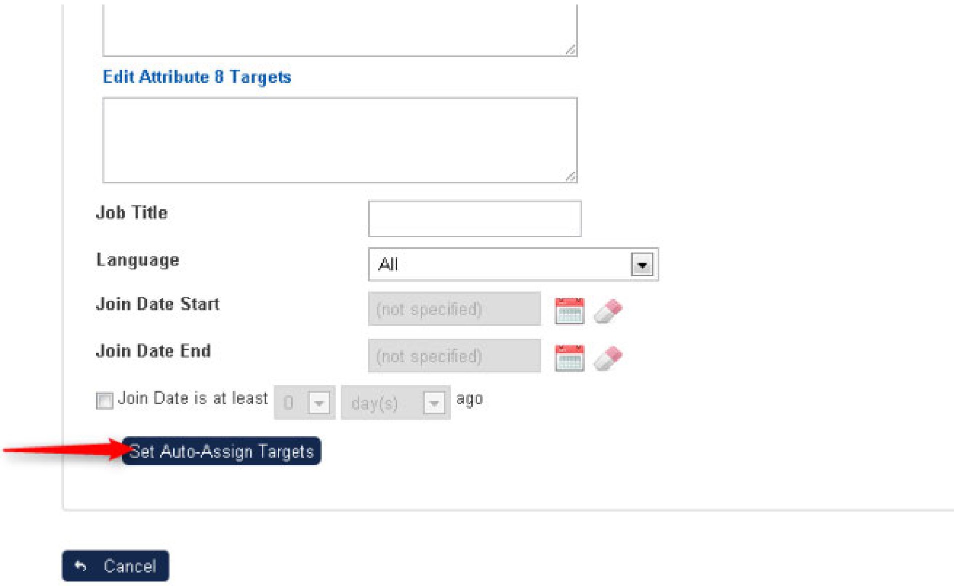
- Organization
- User Group
- Attributes

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

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

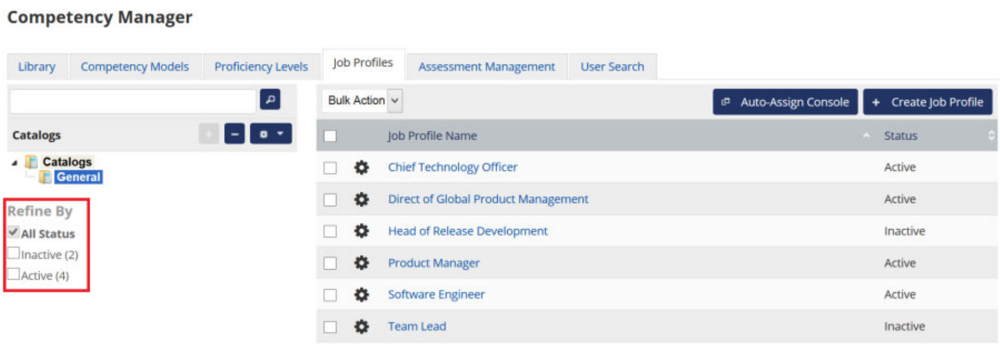


Click the **Set-Auto Assign Targets** button once all the information has been provided.



Status Filter at Manage Job Profiles

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



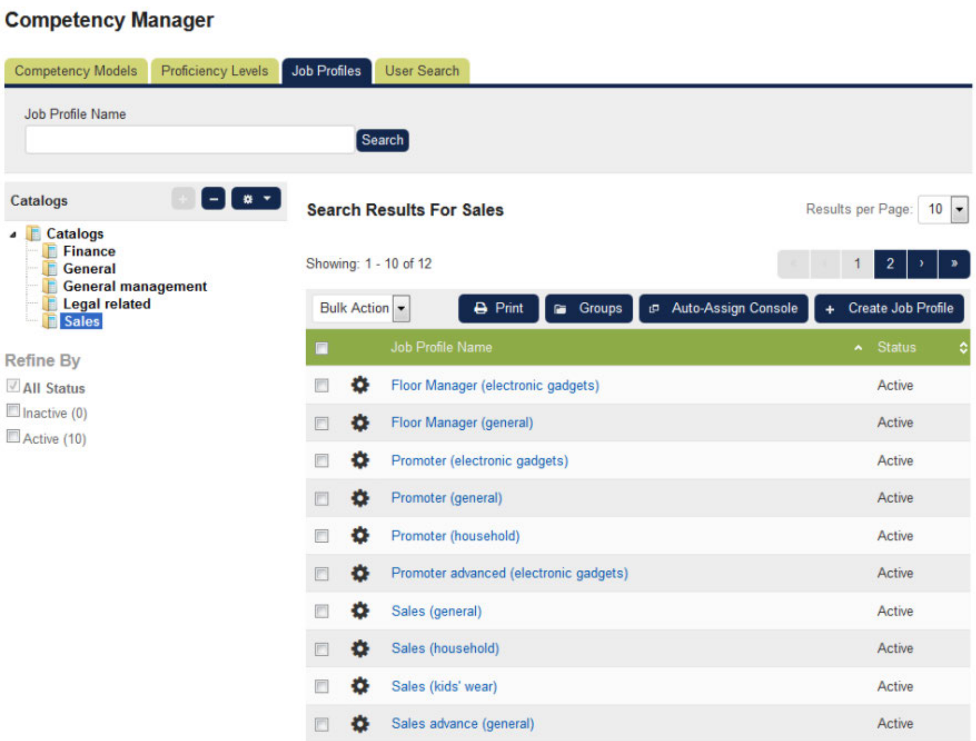
Job Profile Management

- **Job Profiles Redesign**

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

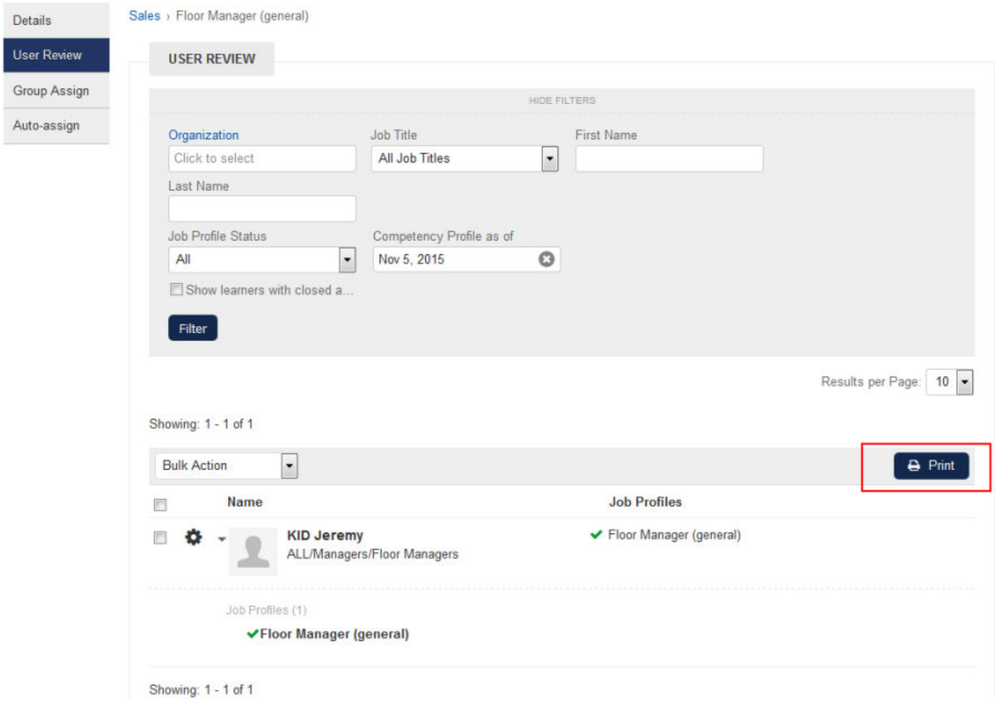
1. Pagination features

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

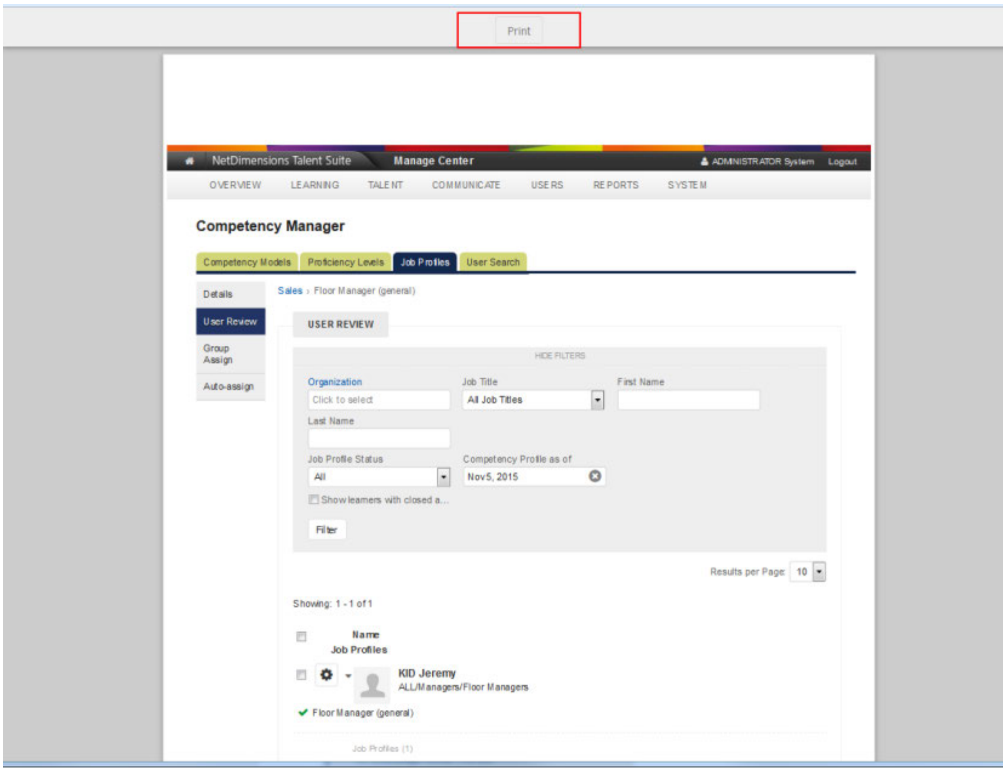


2. Print feature

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



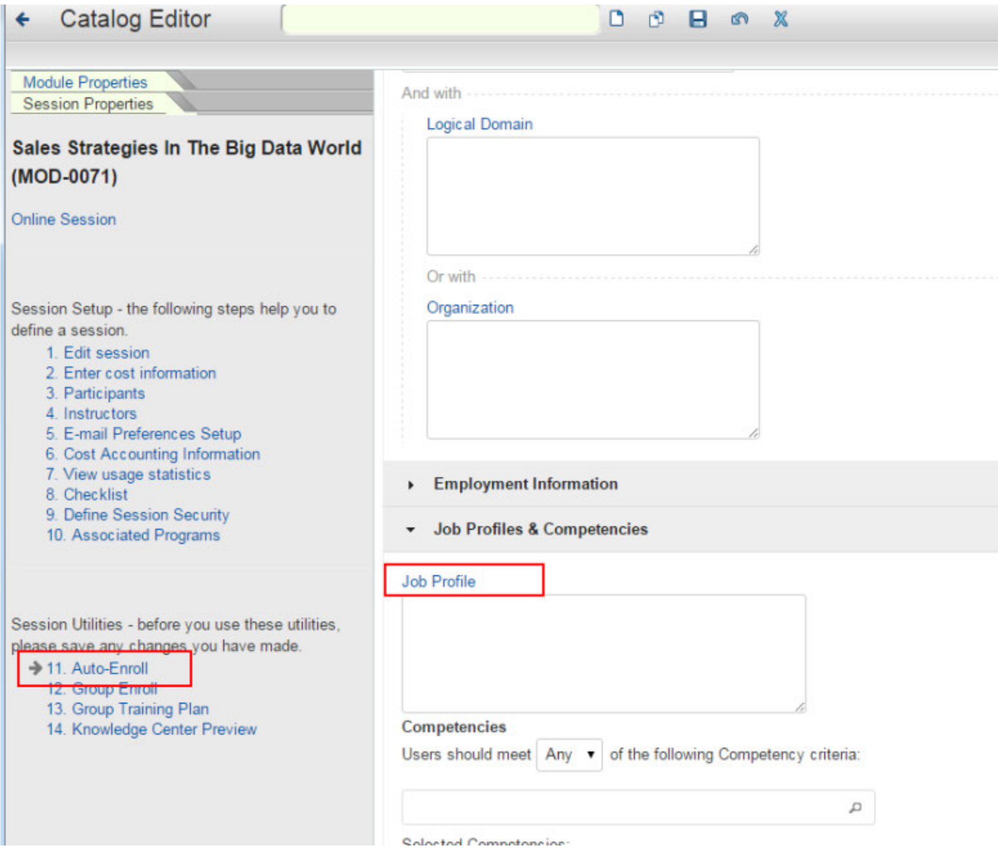
Once you press the Print button, you would see a print preview along with the browser print options dialog.



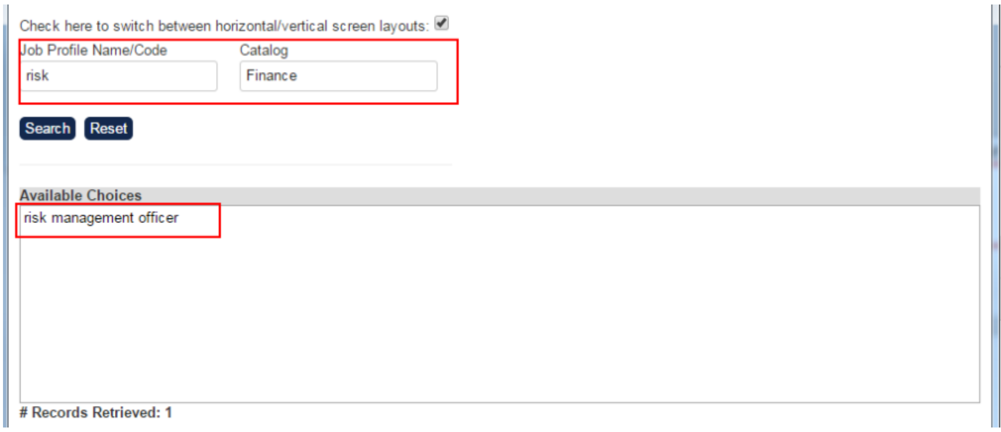
- **Catalog Filtering in Job Profile Selector**

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

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



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



Organization and Job Profile Enrollment Restriction

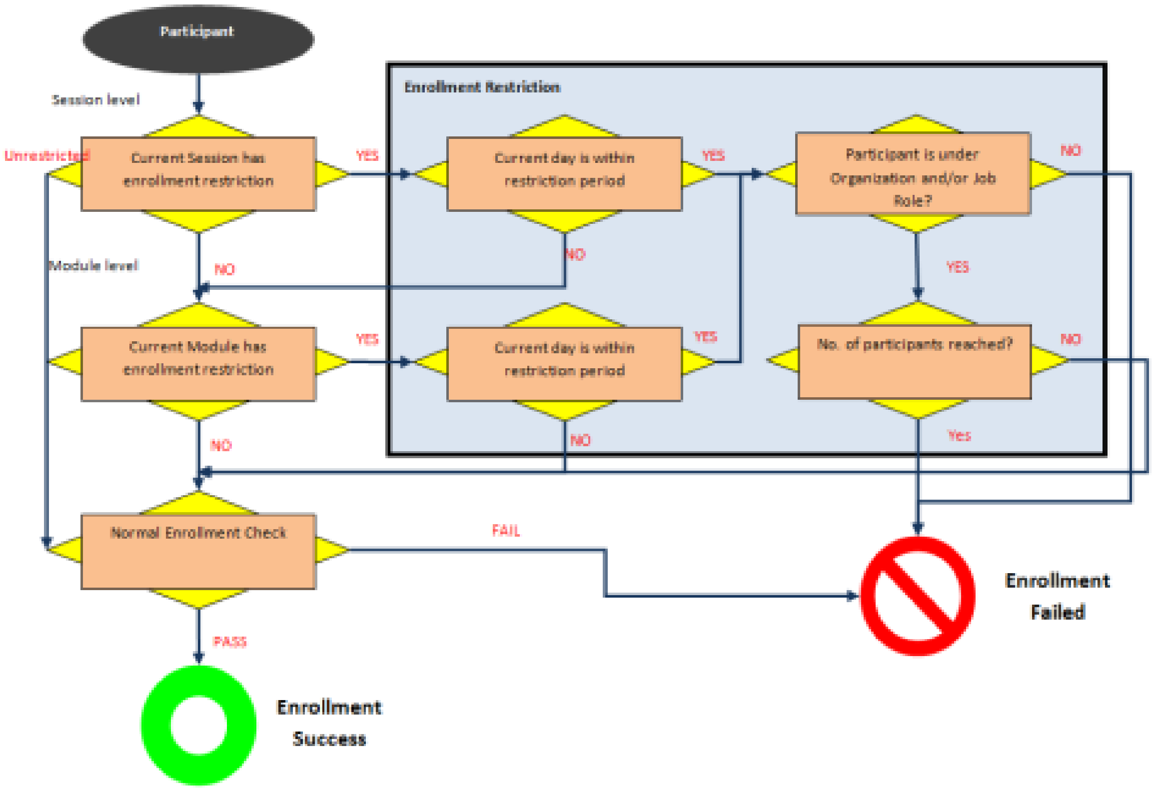
You can restrict the number of participants that can be enrolled onto a session for a given organization and job role (as needed) during a pre-defined period. The participant's organization and job profiles will be checked against the configured limits when enrolling to the course.

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

1. Unrestricted – Override module level enrollment restriction rule (if any). Skip restriction check and apply normal enrollment flow.

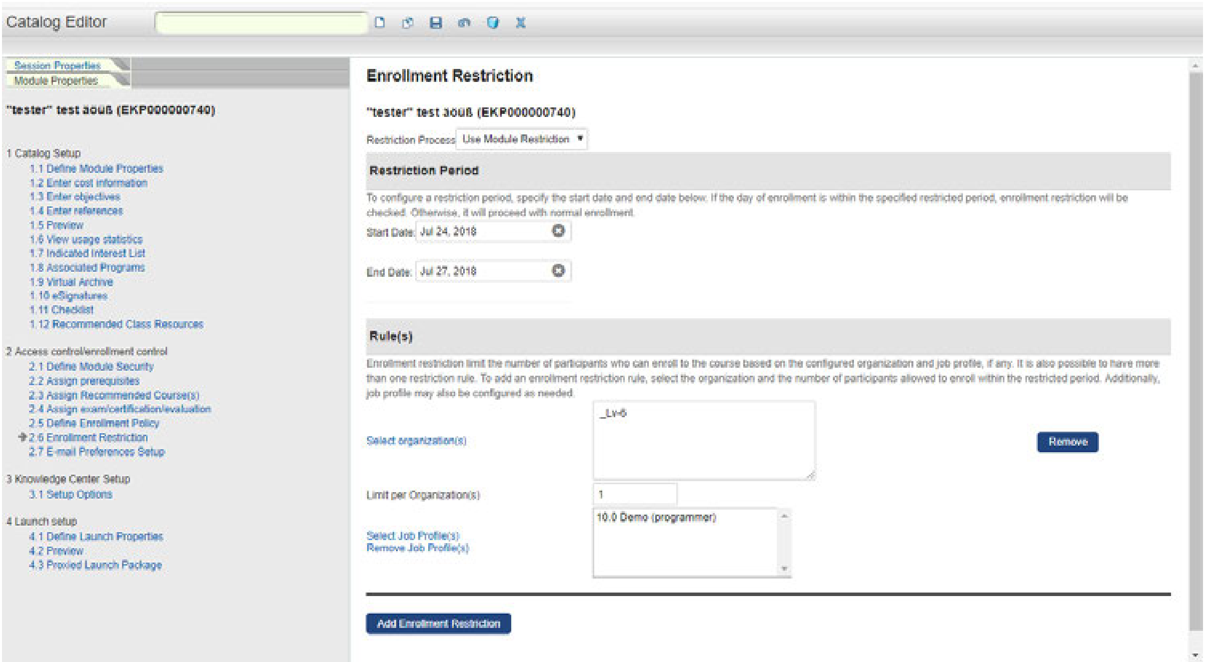
2. Use Session restriction – Override module level enrollment restriction (if any). Apply session level enrollment check.
3. Use Module Restriction – Apply module level enrollment check (default option)

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



Enrollment Restriction

An enrollment restriction page is available in the catalog editor:



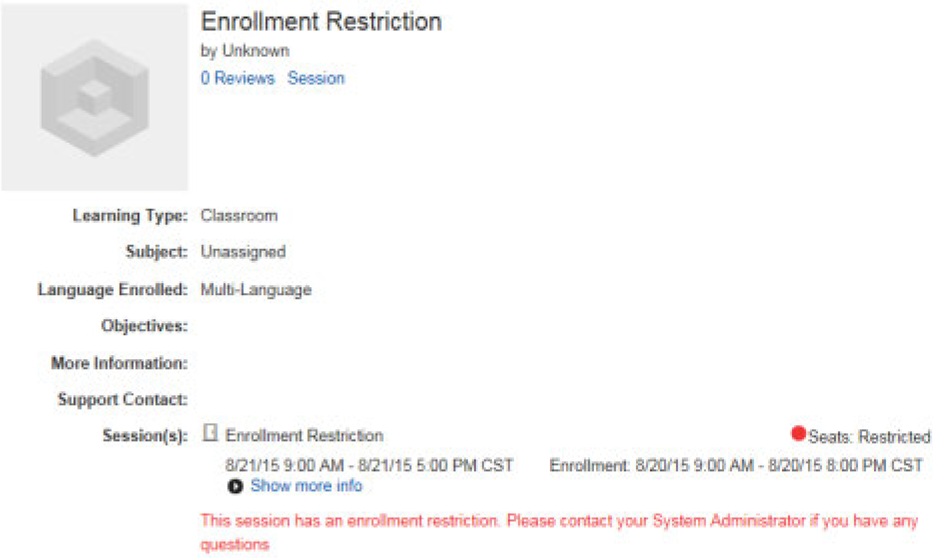
A similar page is also available at the Session level. The following describes all the input fields for "Enrollment Restriction":

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

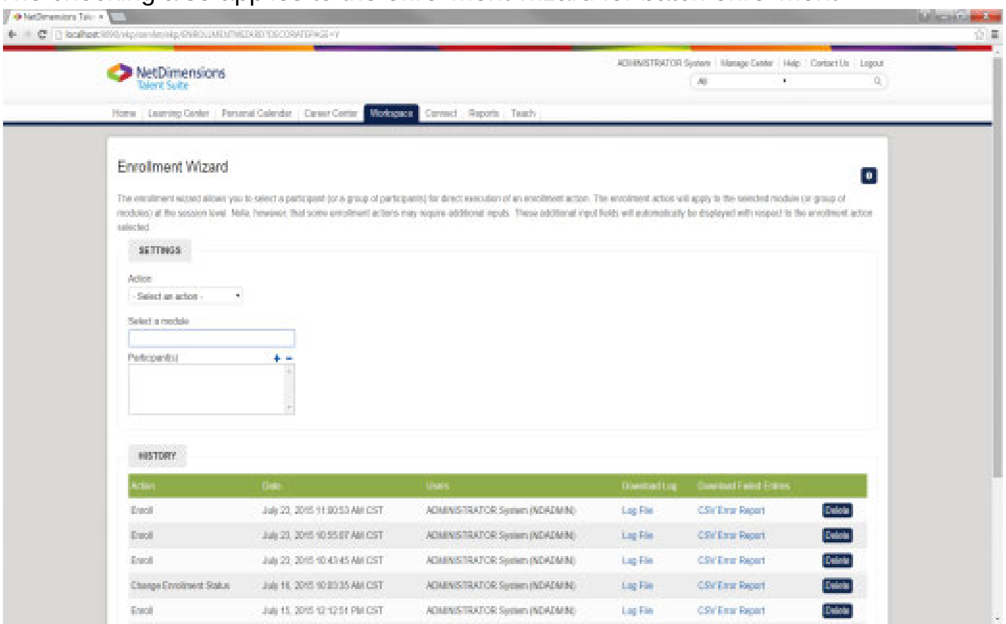
When Module restriction process or Session restriction process (for session level) is selected, removing the last enrollment restriction rule triggers the restriction process to switch back to 'Unrestricted' and all other components are disabled.

Enrollment Restriction Checking

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



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



Enrollment Restriction Matrix

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

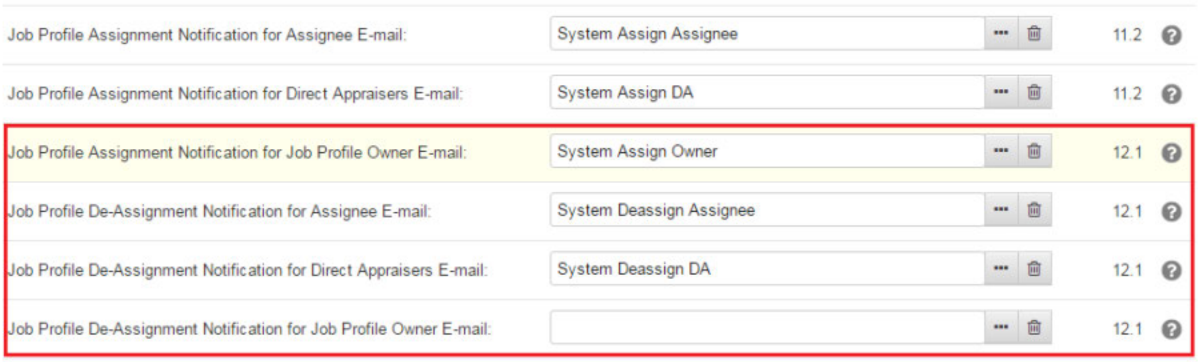
Restriction	Description	Sample valid combinations
Organization=Org1 Limit per Organizations=1	• Maximum one enrollment for the entire Org1 organization structure (includes all its children structure) • Other organizations cannot enroll during the enrollment restricted period	

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

Job Profile Assignment Notifications

Six options are listed as global settings in System Configuration:

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



Job Profile Notification Options in System Configuration under Competency Manager

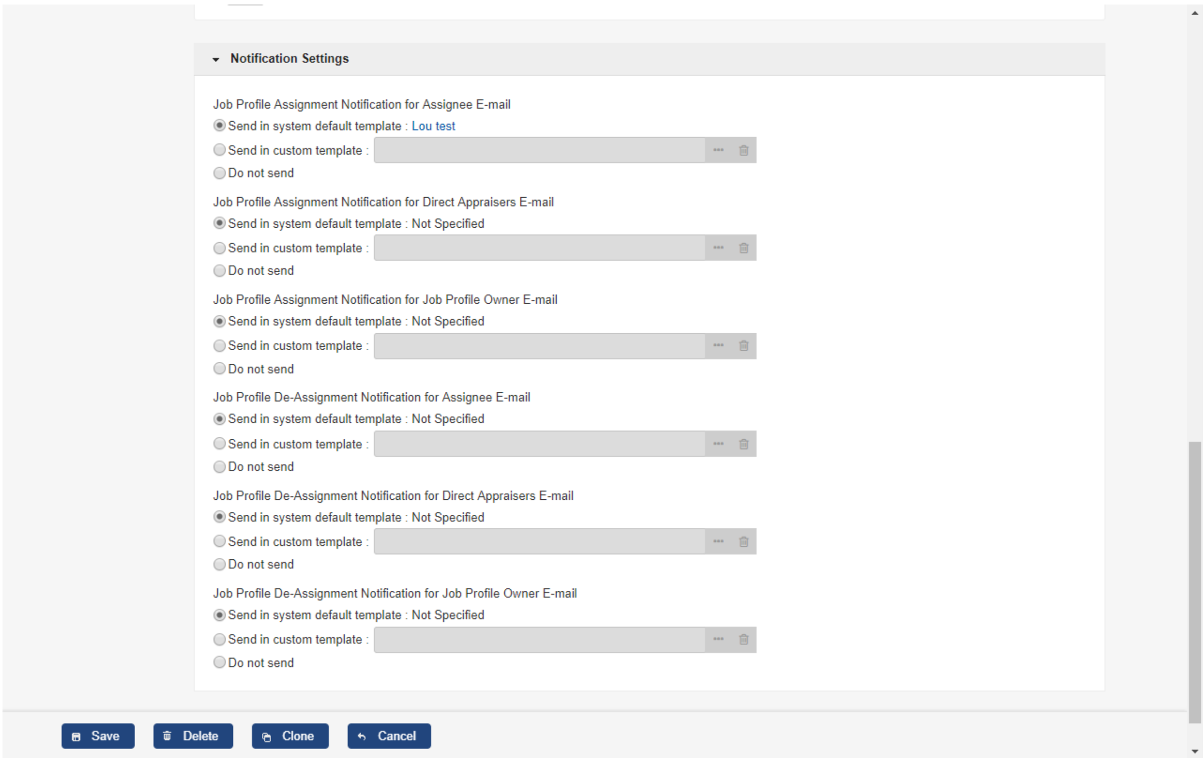
Notifications are sent out when the Job Profile is assigned via:

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

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

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

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



Notification Settings on Job Profile detail page

Job Profile CSV Loader

The ***Job Profile CSV Loader*** allows administrators to *add, update* and *delete Job Profiles* as well as *assign or de-assign Competencies* to existing Job Profiles, using a single CSV file. For more information, please refer to EN145 Data Import / Export.

Job Profile Owner

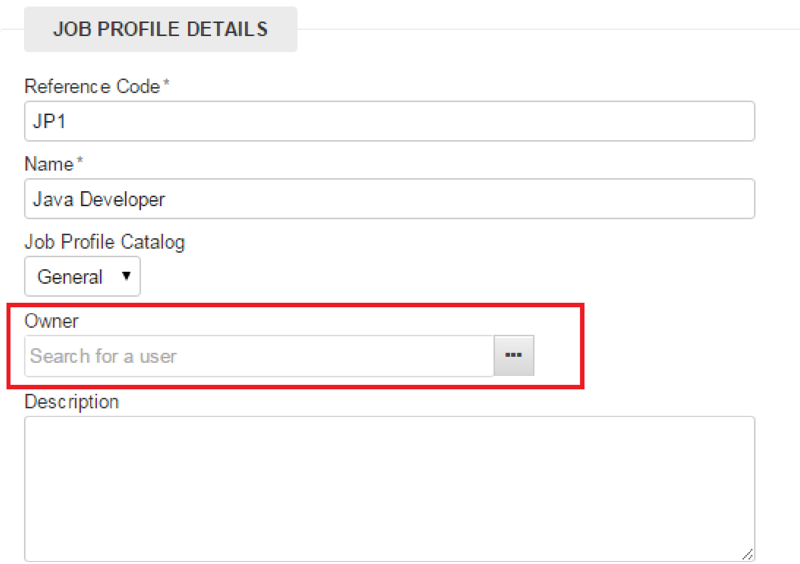
In some organizations, a person is assigned to be responsible for a job profile, the owner of the job profile would like to receive any notifications related to the job profile. Therefore, a Job Profile Owner field has been added to specify a person with this role. This field is available to be defined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

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

Job Profile Details Page

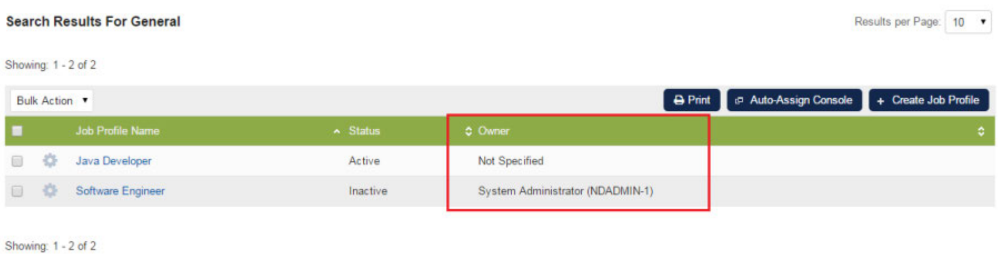
A standard inline user selector field is added to the details page of the job profile to select the Job Profile Owner.

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



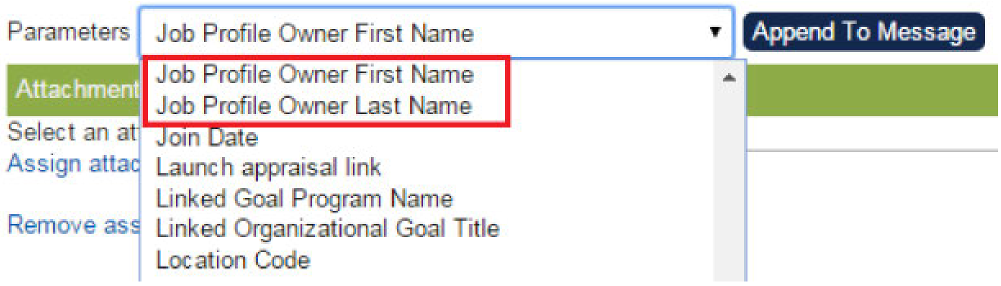
Job Profiles List Page

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



E-mail placeholder parameter

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



Mapping Competencies to Job Profiles

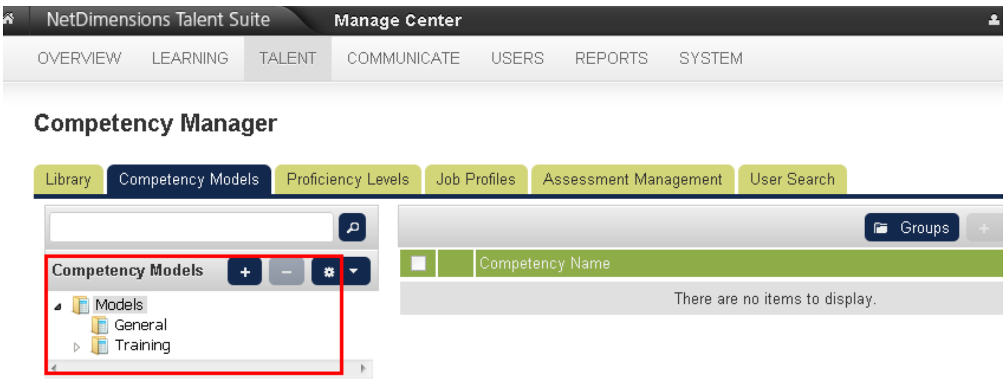
Mapping the competency to a job profile can be done in two ways:

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

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

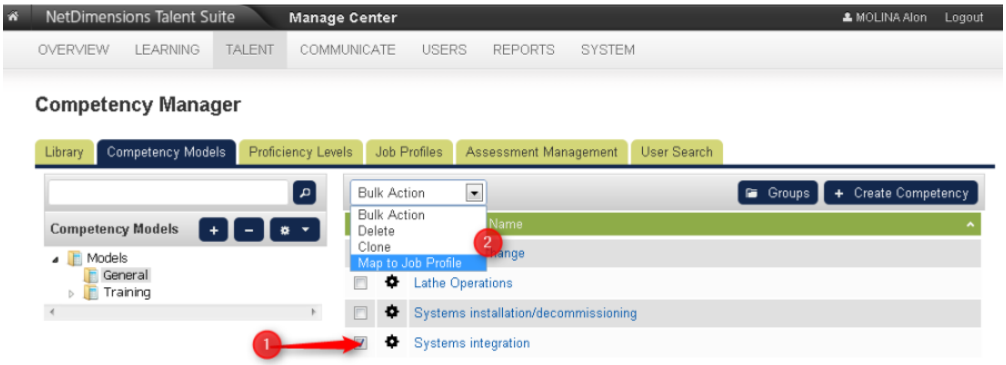
Mapping Function at Competency Models

On the Competency Models tab, select the competency model.

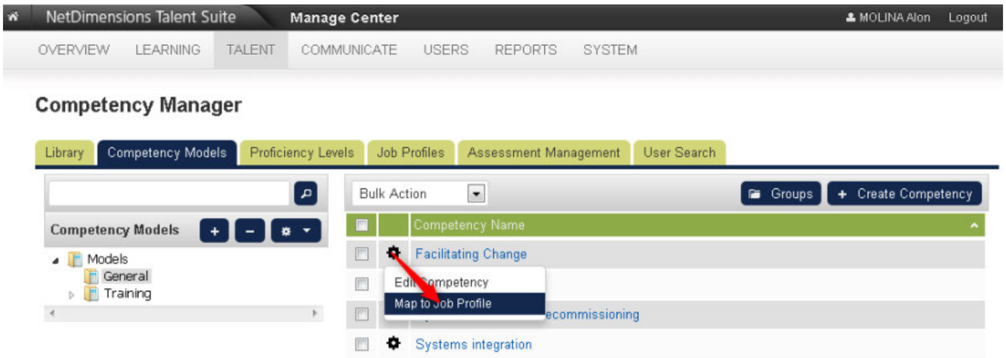


From the list, select the competency you want to map.

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

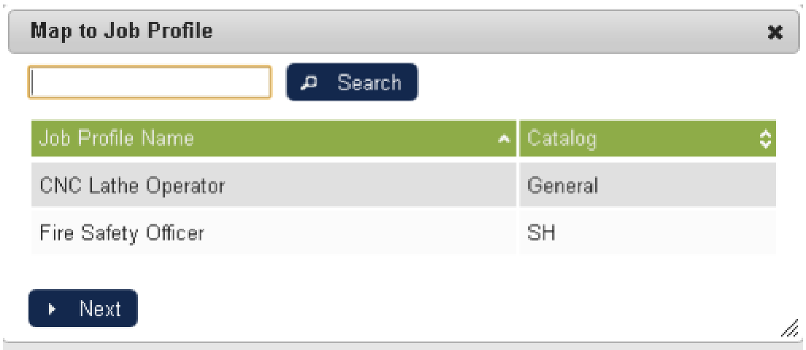


The second way of mapping the competency to a job profile: Click the **Tools** icon of the competency you want to modify and then select the **Map to Job Profile**.

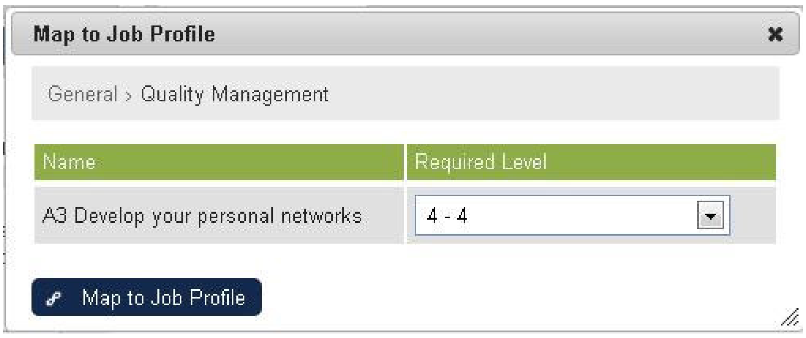


The menu for selecting job profile will be displayed.

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



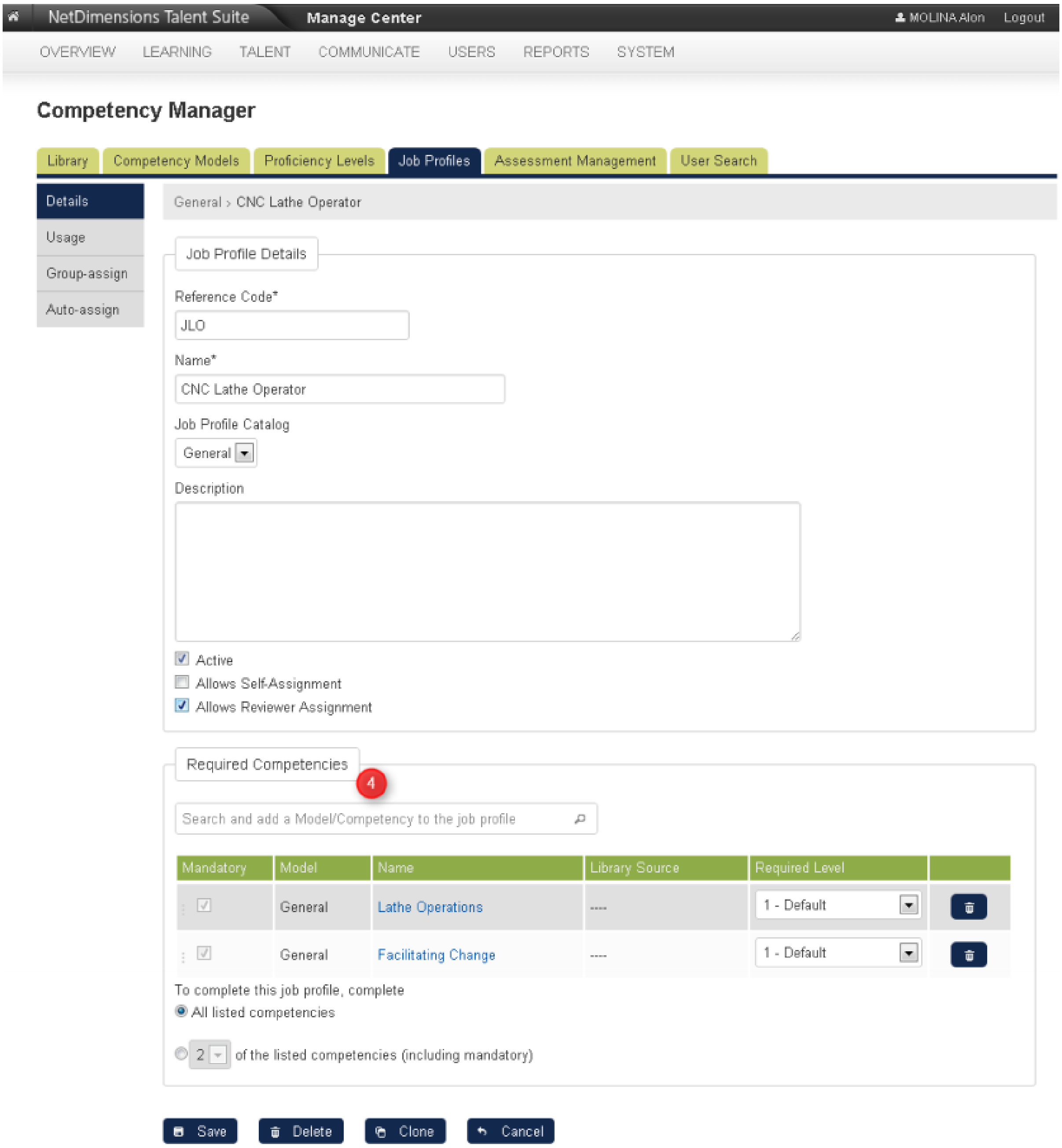
The menu for selecting the required proficiency level is displayed. Select the required proficiency level. Click the **Map to Job Profile** button.



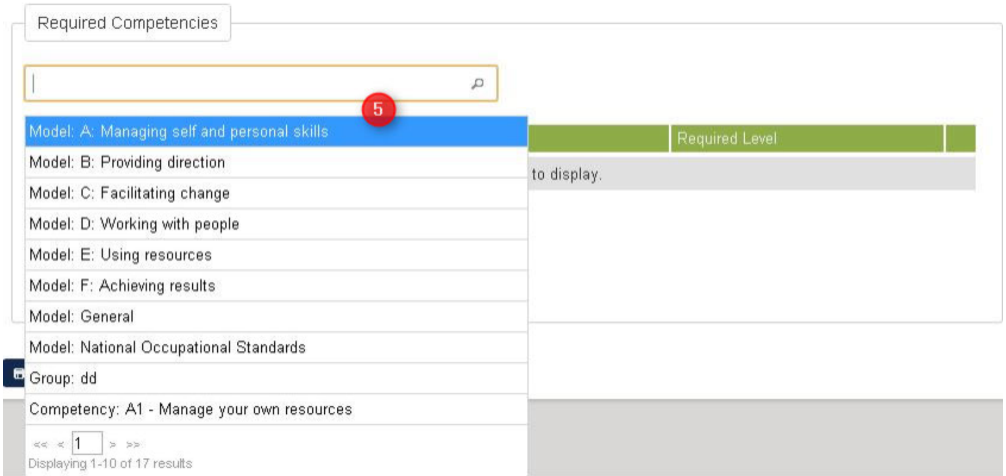
A confirmation message will be displayed. Click the **Go to Job Profile** if you want to proceed to Job Profile details, otherwise, click **OK.**

Assigning Competencies when Editing Job Profile

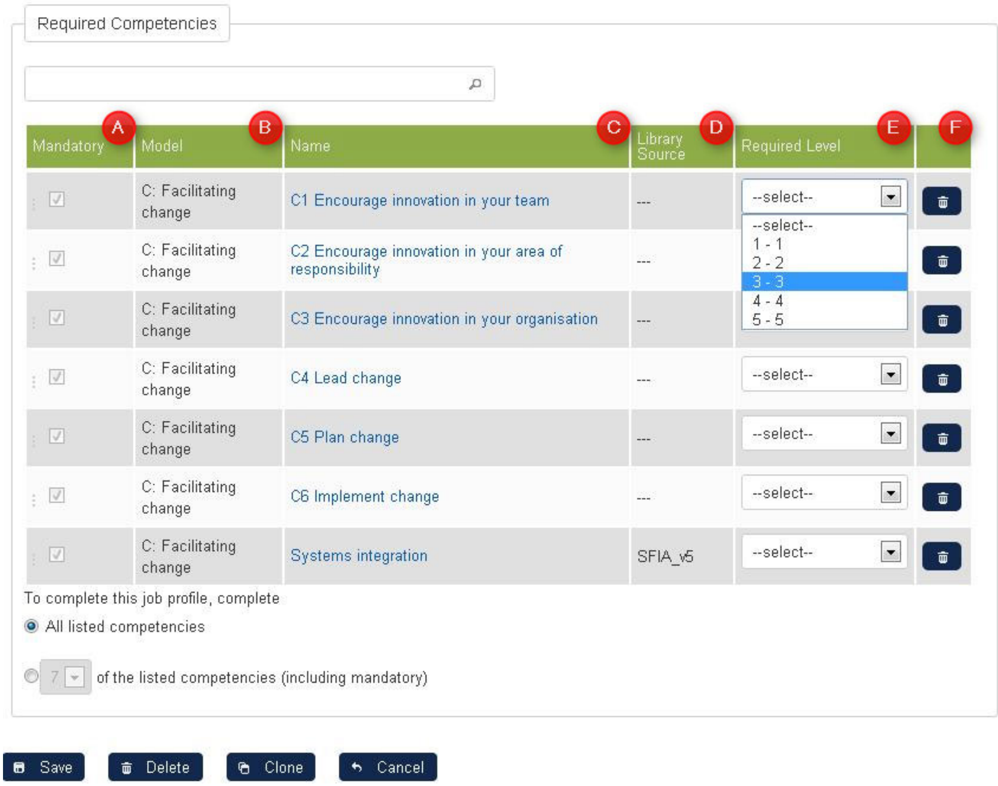
While editing a job profile, you can assign competencies under the Required Competencies section. Cli ck the search button to display the list of competencies.



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



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



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

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

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

B. Displays the competency model.

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

D. Displays the library source.

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

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

Auto-Assign Console

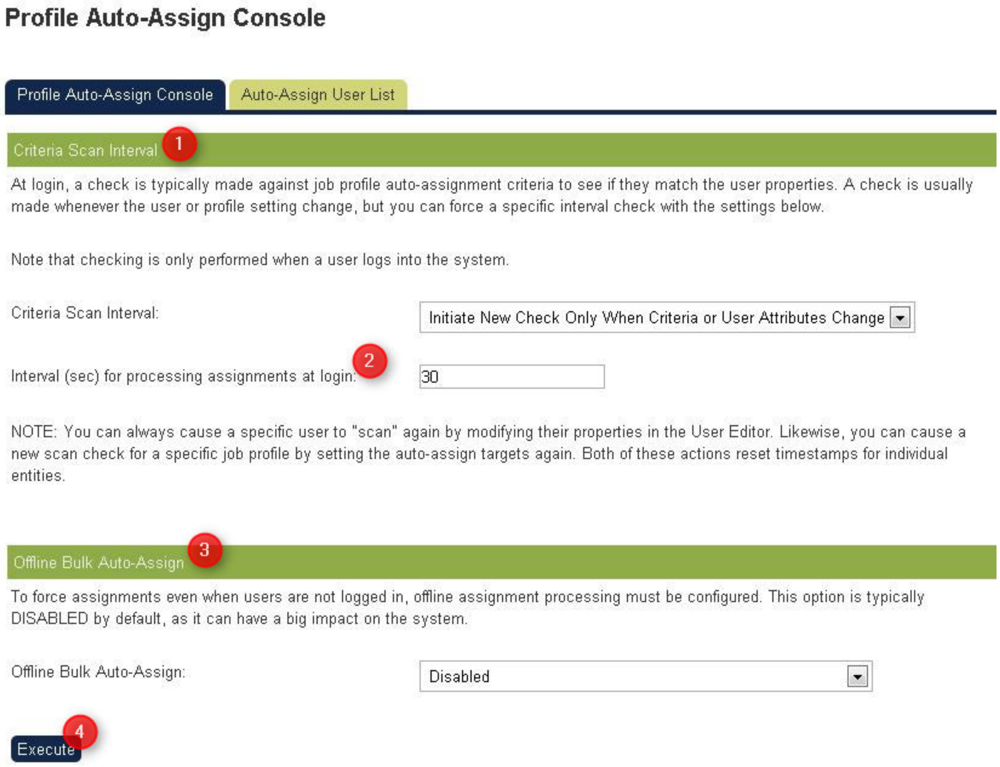
(available for Performance and Learning only)

Auto-assigning Console

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

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

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



1.Criteria Scan Interval

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

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

2.Interval (sec) for processing assignments at login

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

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

3.Offline Bulk Auto-Assign

To force assignments even when users are not logged in, offline assignment processing must be configured. This option is typically DISABLED by default, as it can have a big impact on the system.

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

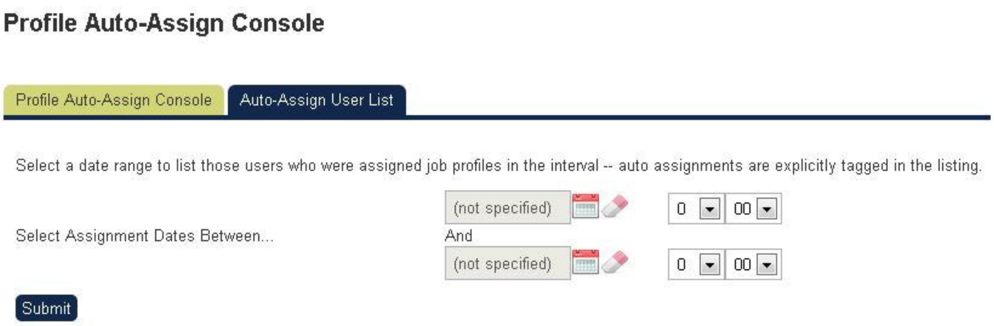
Click **OK** to proceed, otherwise, click Cancel. When **OK** is selected, a message is displayed to confirm that the new setting is saved.

Listing Auto-Assign User List

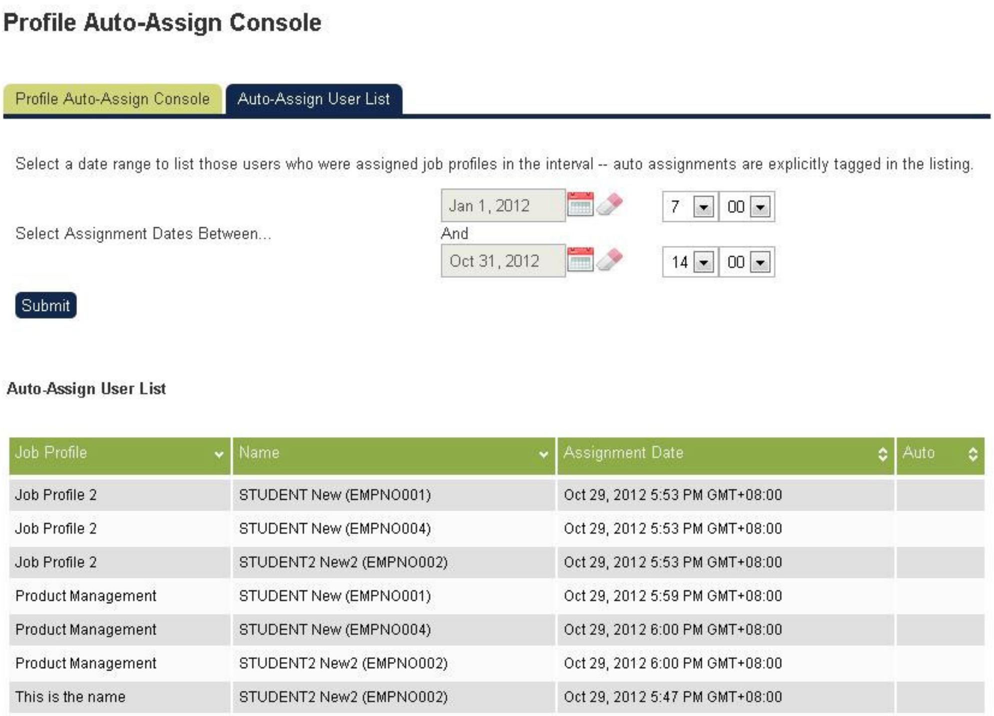
This section teaches you on how to generate the auto-assign user list base on the specified dates. To do this:

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

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



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



Competency Group Editor

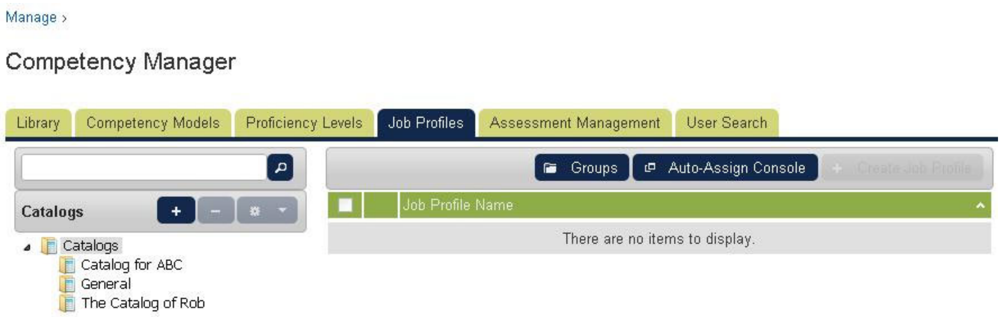
(available for Performance and Learning only)

The Competency Group Editor allows you to do following tasks:

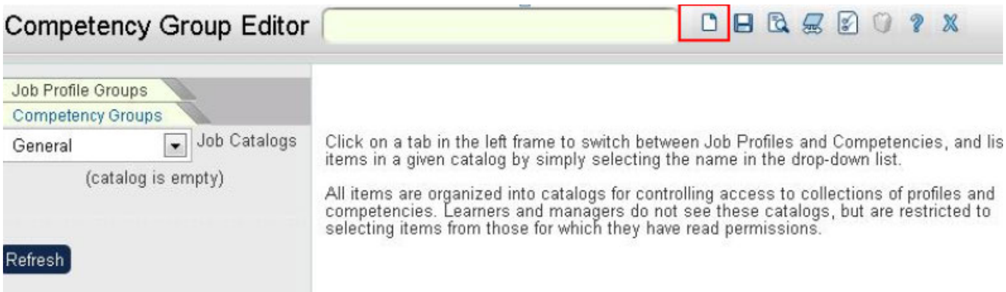
- Create and Manage the Job Profile Groups
- Create and Manage the Competency Groups
- Associate the Job Profile Group with the Catalog and Job Profile
- Associate the Competency Group with the Catalog and Job Profile

Creating a Job Profile Group

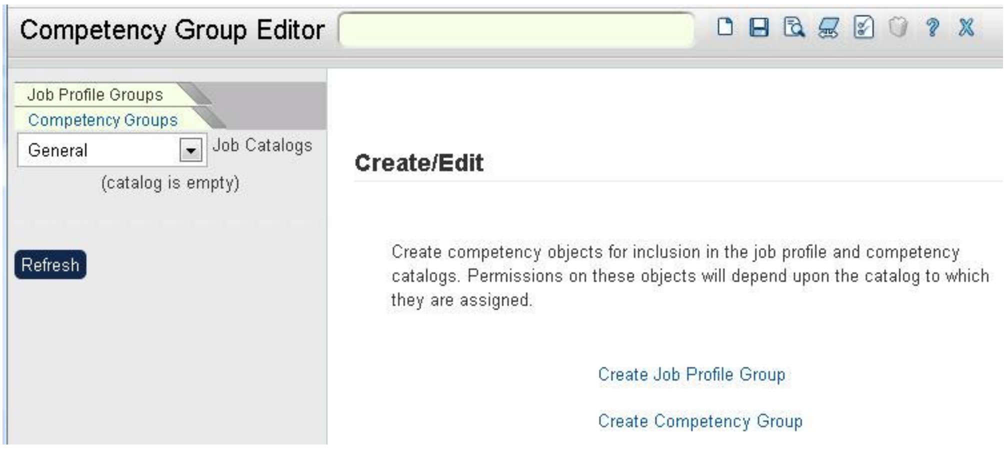
Click the **Groups** button under **Job Profiles** tab.



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

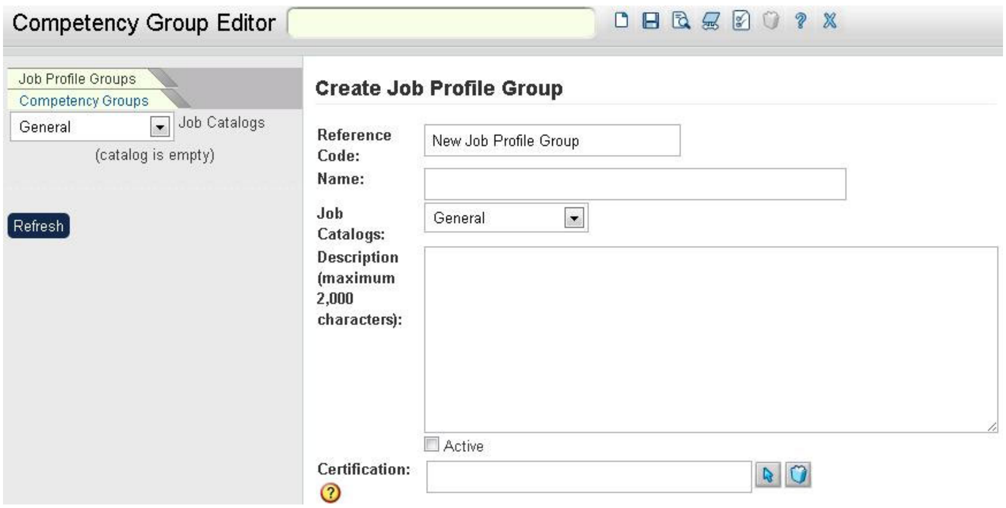


The screen refreshes. Click the **Create Job Profile Group** hyperlink.



Enter the job profile details as listed:

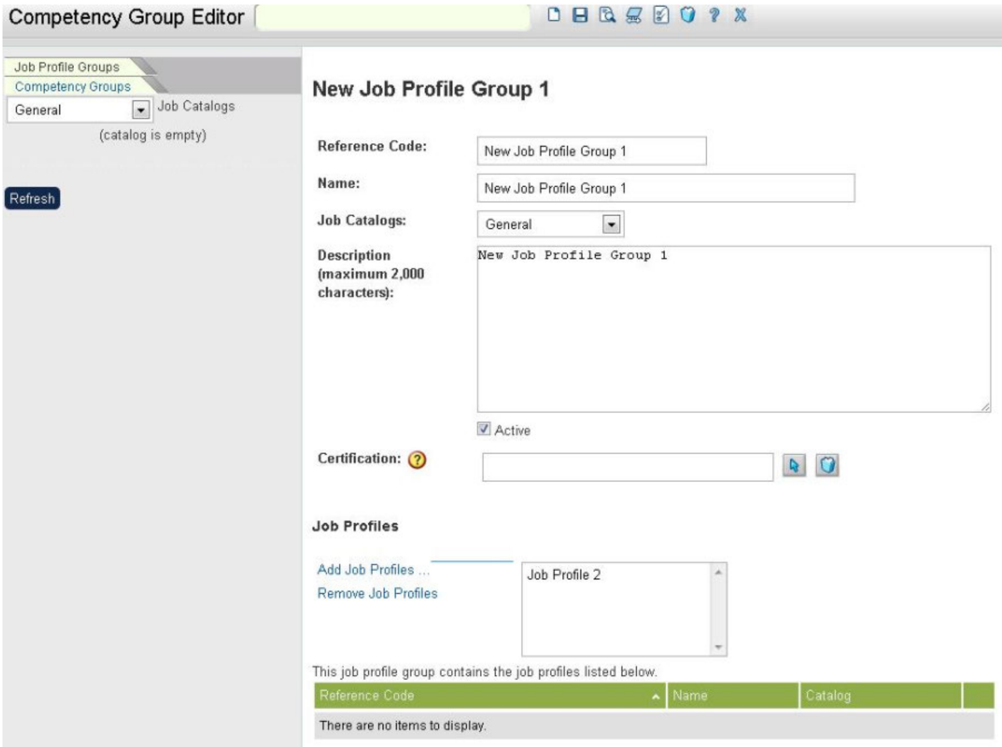
- Reference code
- Name (Job Profile Group Name)
- Job Catalog (the job catalog where the job profile group is associated)
- Description
- Active (tick the box to make the status of the job profile group to become active)
- Select the certification associated with the job profile group.



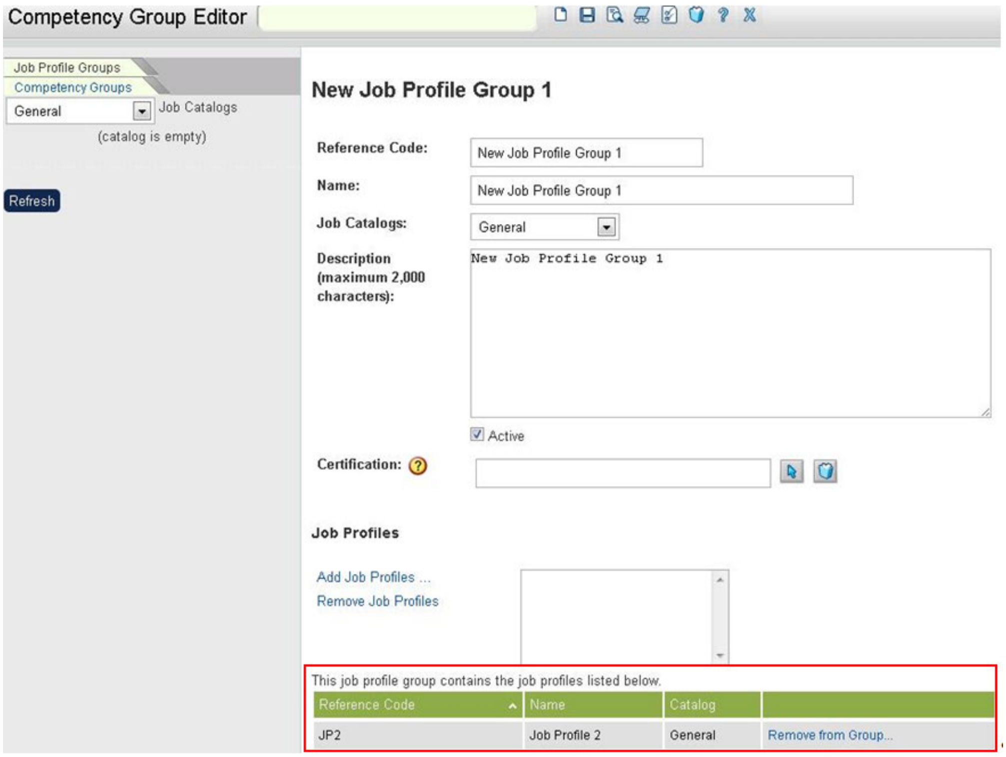
Click the **Save** icon.

Adding a Job Profile to Job Profile Group

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



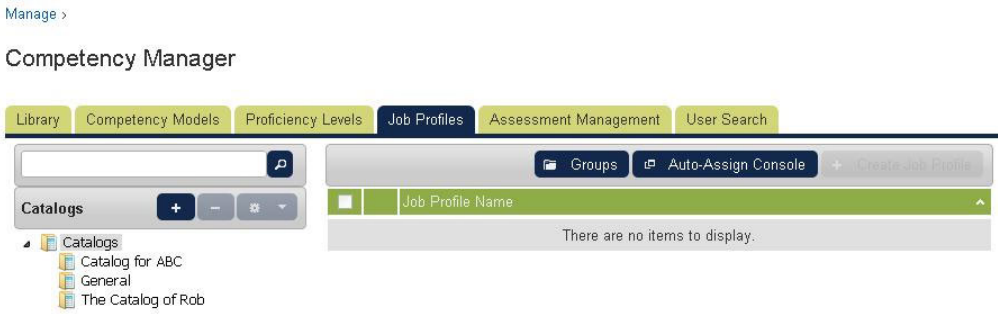
Click the **Save** icon to save the updates. Once saved, the job profile will be listed on the job profile list.



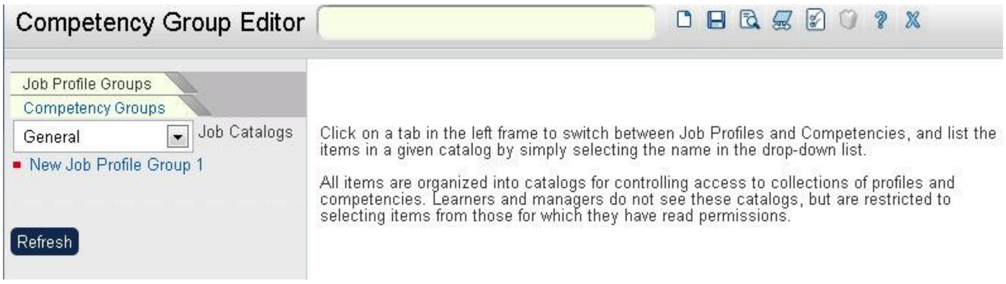
To remove the job profile from the list, click the **Remove from Group...**link.

Modifying Job Profile Group

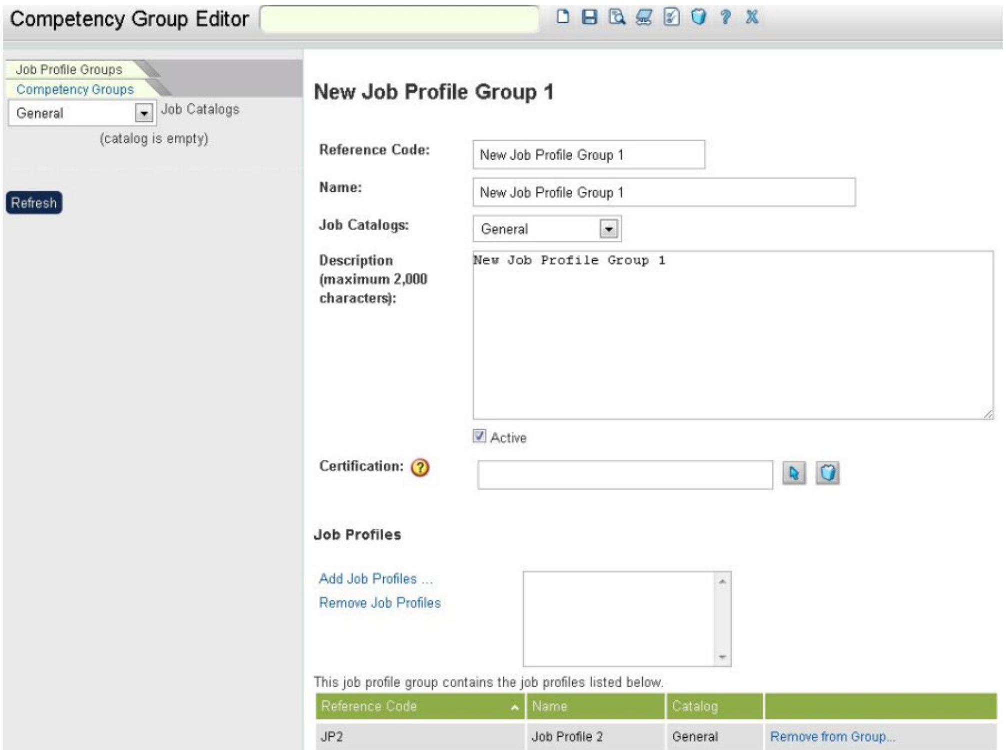
Click the **Groups** button under **Job Profiles** tab.



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



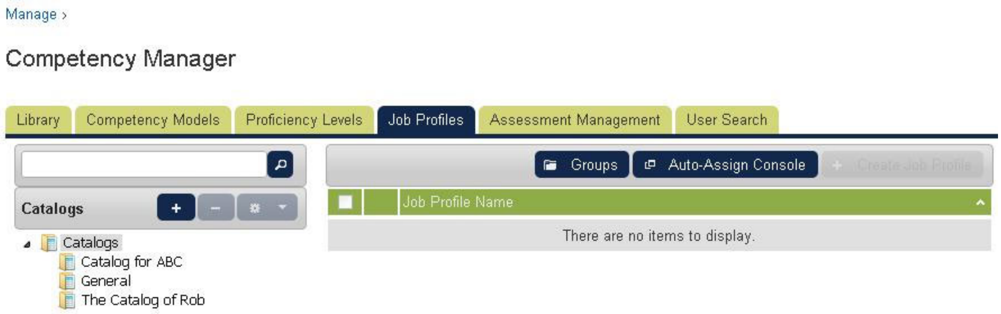
The *Competency Group Editor* displays on the new window. Start modifying the job profile group details.



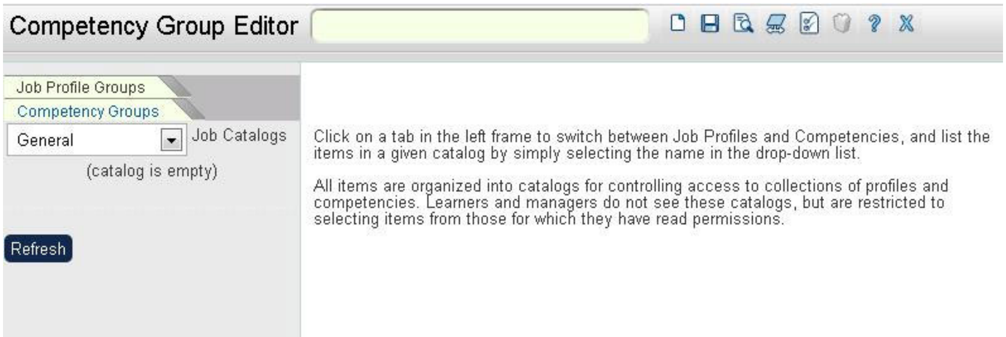
Click the **Save** button to keep the changes.

Creating a Competency Group

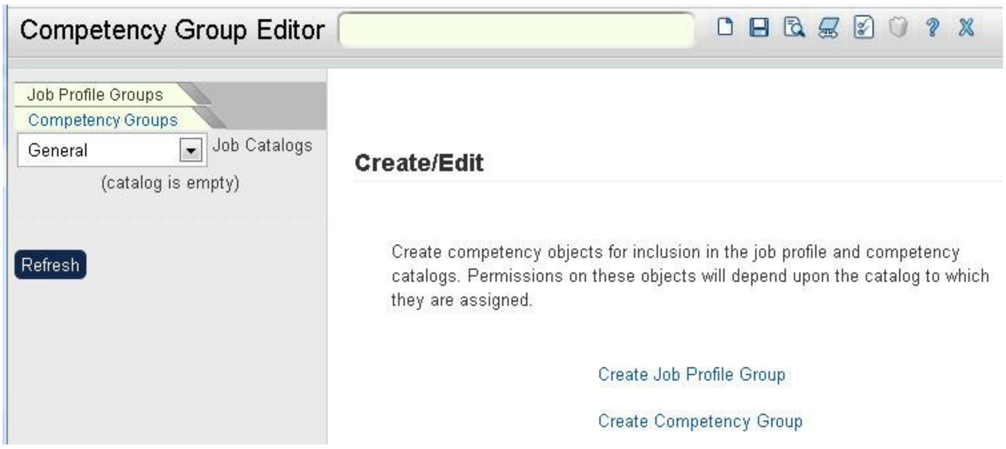
Click the **Groups** button under **Job Profiles** tab.



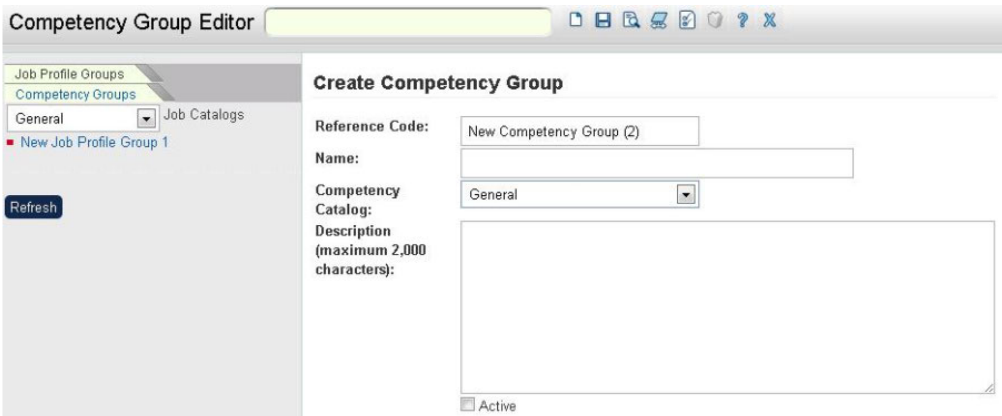
The *Job Profile Group Editor* displays on the new window. Click the **New** icon.



The screen refreshes. Click the **Create Competency Group** hyperlink.



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

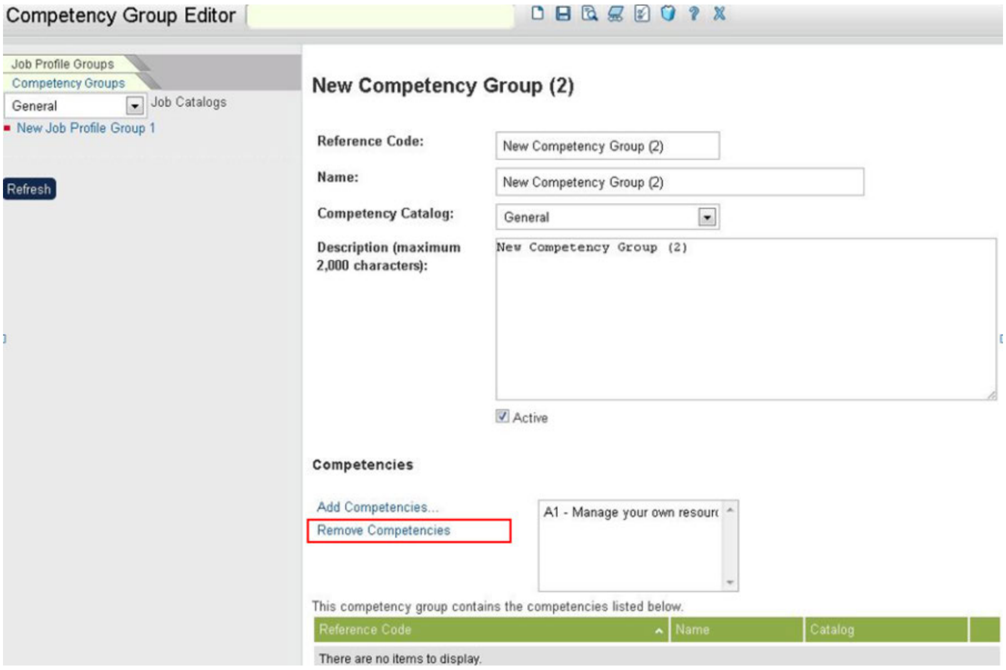


Enter the following competency group details:

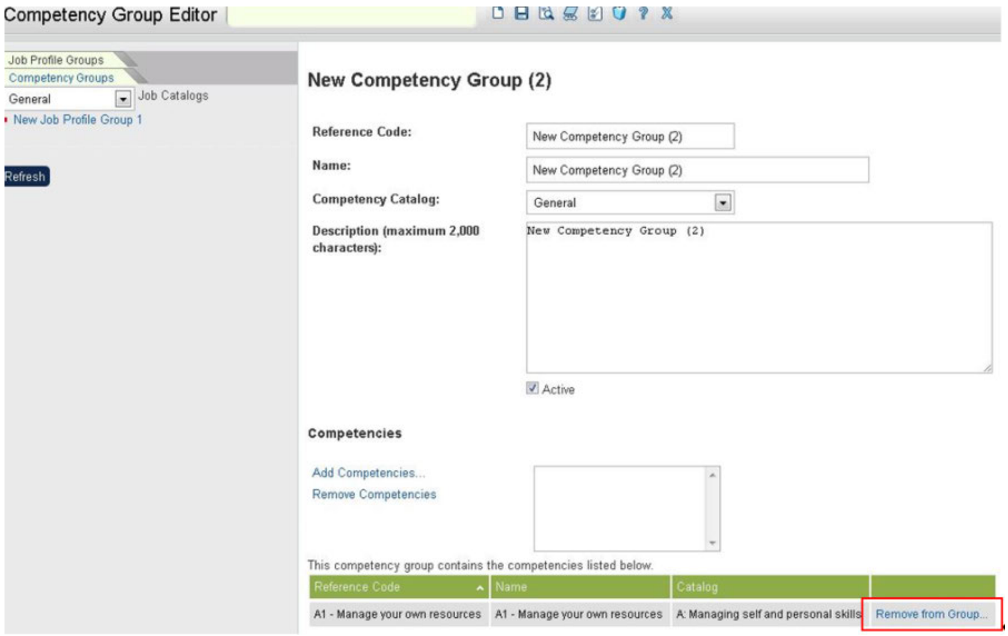
- Reference code
- Name (Competency Group Name)
- Competency Catalog (the competency catalog where the competency group is associated)
- Description
- Active (tick the box to make the status of the job profile group to become active)

Adding Competency to a Competency Group

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



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



Searching for Job Profile Group and Competency Group

To search for a job profile group or competency group:
1. From the competency group editor, Click the **Search** icon.
2. Filter the search result using the parameters stated just below the image.

- Tick the active box to display all active groups
- Select which group you want to display (Job Profile Group or Competency Group)
- You can enter the name of the group or the reference code.

3. Click the **Search** button to start the searching process

Ranking Users

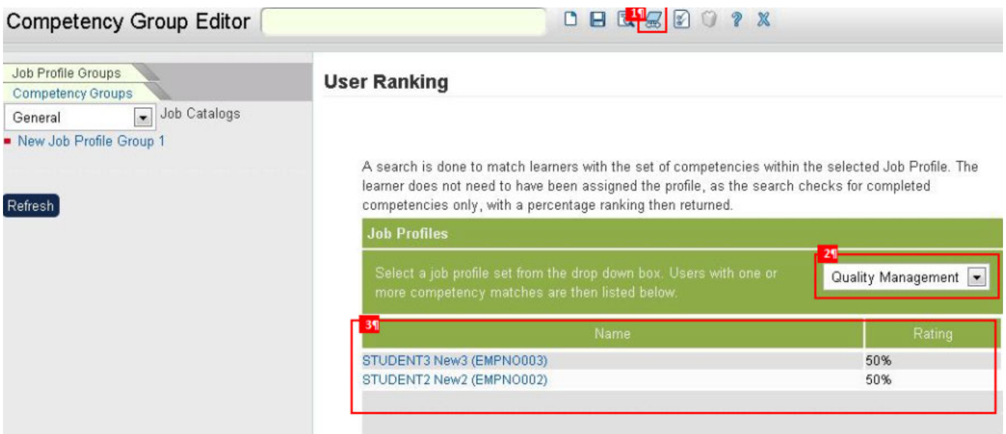
User Ranking is an administrator function that allows you to search for and rank users according to the number of competencies satisfy. You would first construct a Job Profile containing the three competencies below then use the User Ranking function to retrieve a list of users ranked according to how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

- Time Management
- Project Management
- Word Processing

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

2. Select a job profile from the drop down list box.

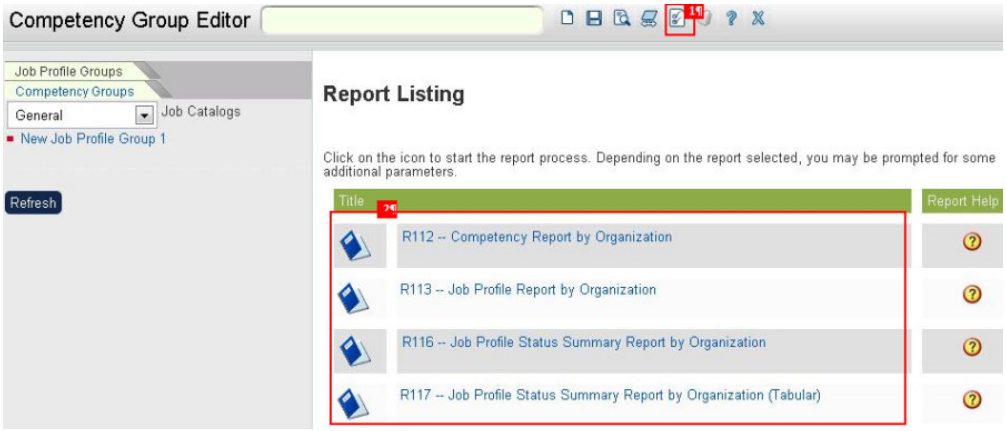
3. Users with one or more competency that matches the job profiles will be listed.



Generating Competency Reports

To generate competency reports:

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



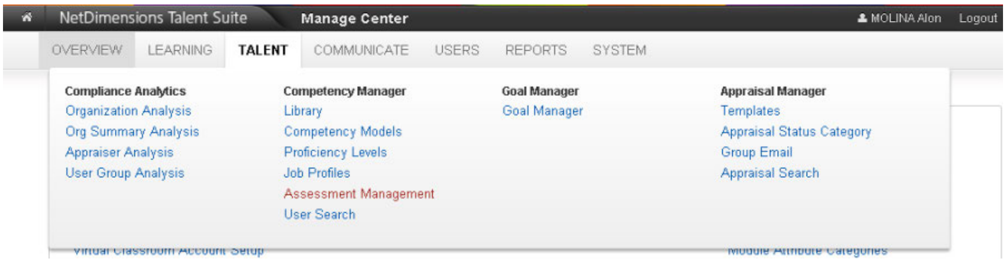
Assessment Management

(available for Performance only)

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

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

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

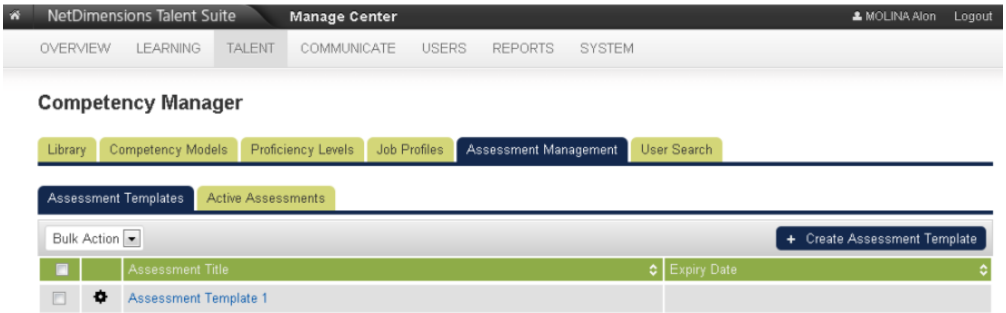


Creating an Assessment Template

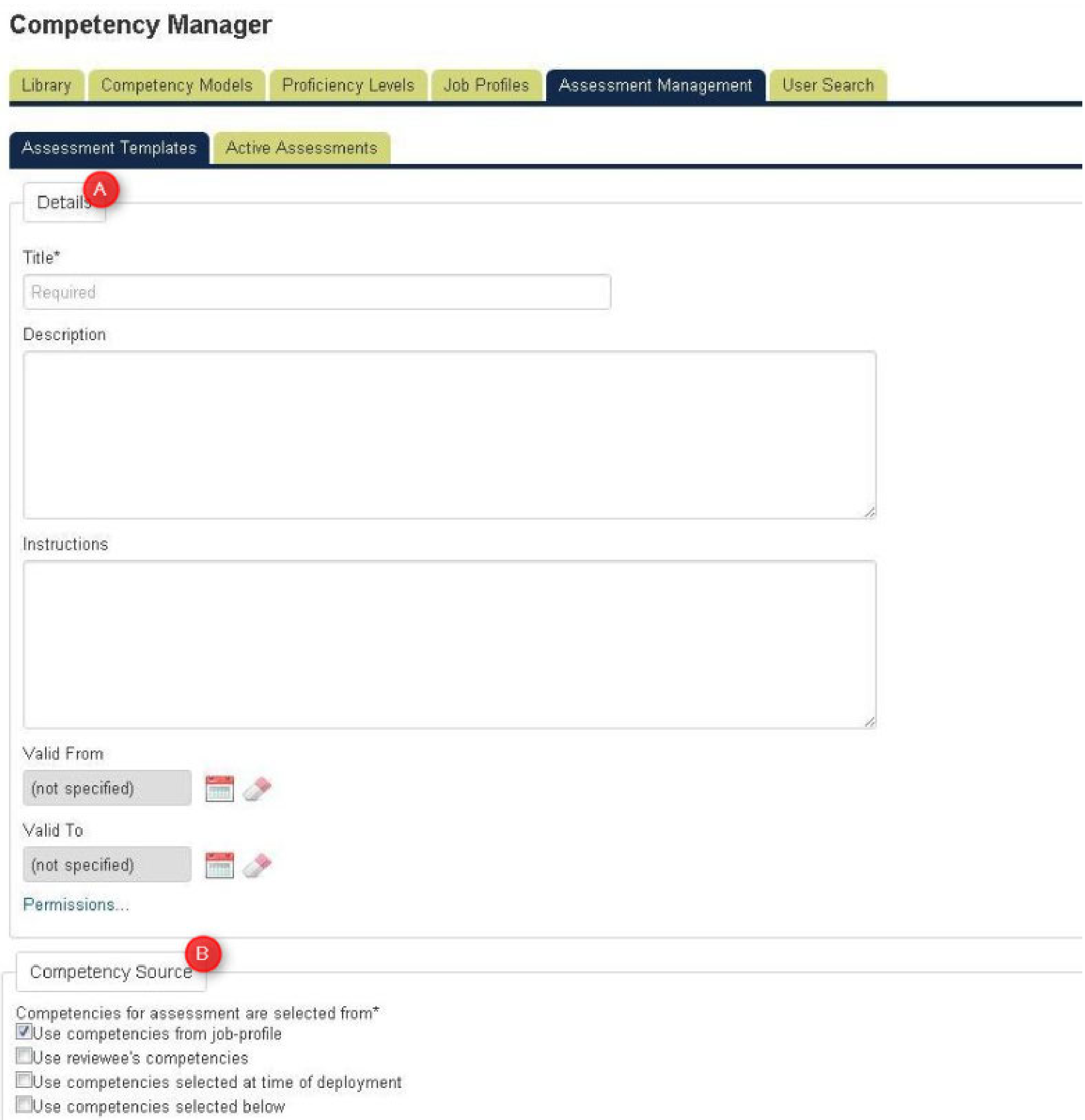
The assessment template allows you to define the requirements on assessing the learner. On the assessment template you can specify the following:

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

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



The new assessment template will be displayed:

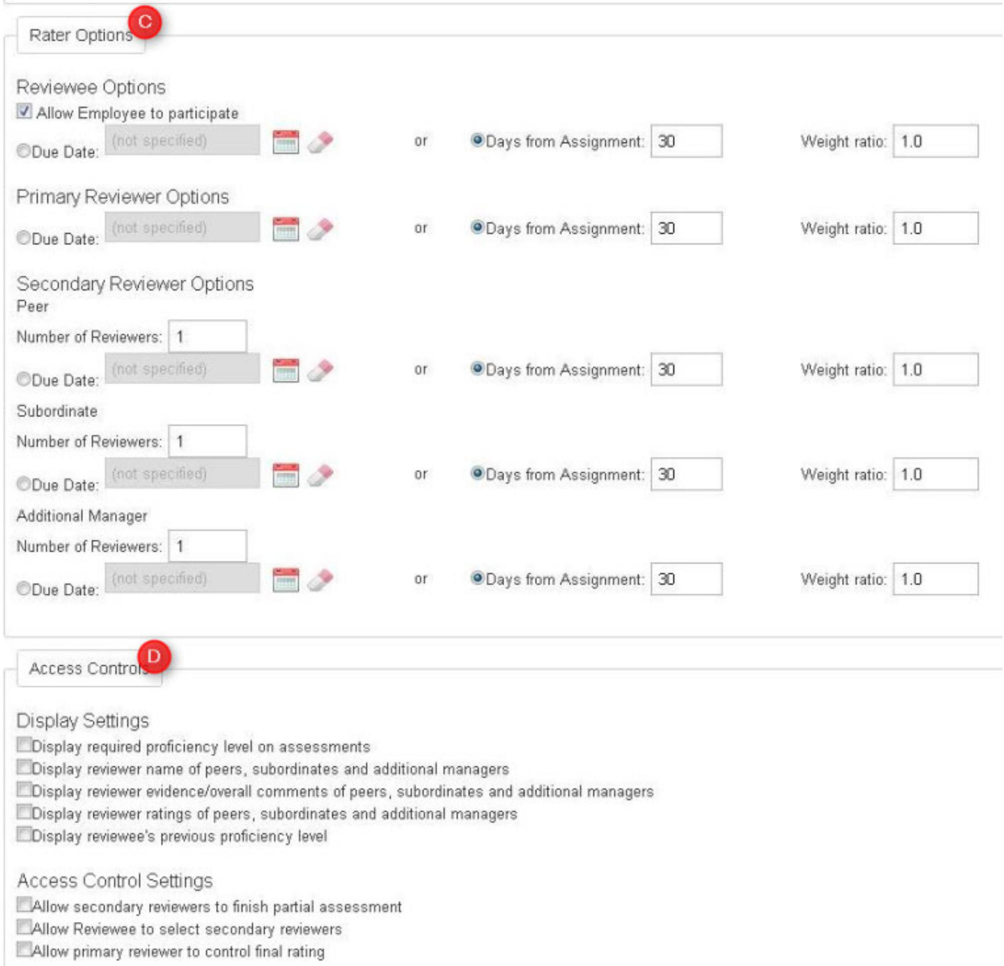


A. The **Detail** section requires you to enter the following:

- Title or name of the assessment template
- Description of the assessment template
- Instructions on how fill up the assessment template

- Validity dates (to and from)Permission to access this object

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



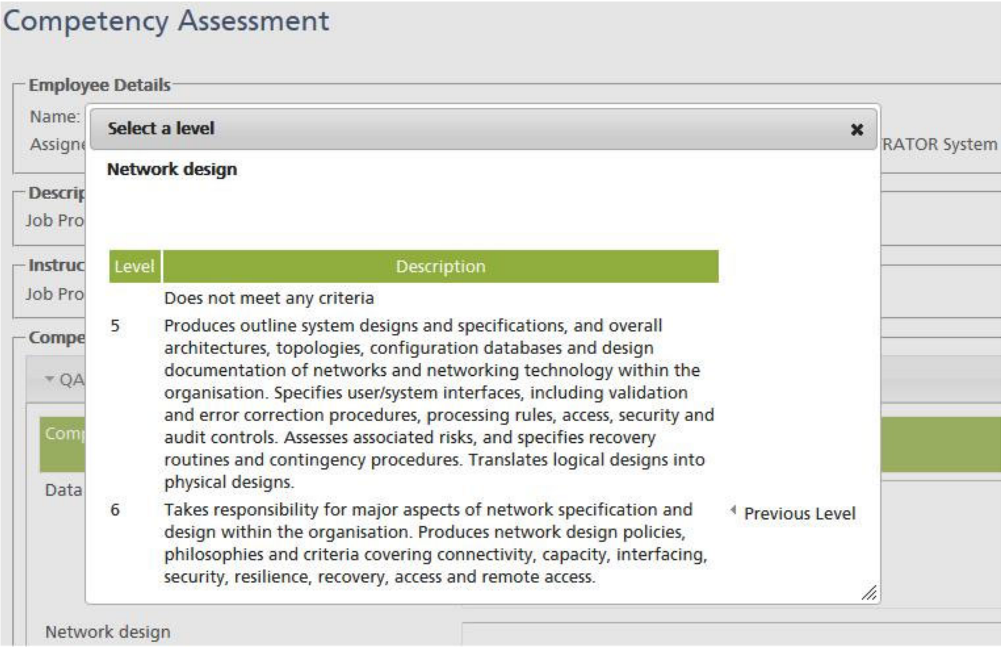
C. Rater Options
Secondary reviewers have been categorized into three separate groups for a more granular control of the assessment:

- Peers
- Subordinates
- Additional Managers

D. New Display Settings
New display settings have been incorporated into the assessment template as follows:

- Display reviewer name of peers, subordinates and additional managers
  - This setting controls whether the name of secondary reviewers will be displayed on the "Sign Off" page for primary reviewer and on the "Assessment Report" page for the reviewee.
- Display reviewer evidence/overall comments of peers, subordinates and additional managers
  - This setting controls whether the evidence and overall comments entered by the secondary reviewers will be displayed on the "Sign Off" page for primary reviewer and on the "Assessment Report" page for the reviewee.

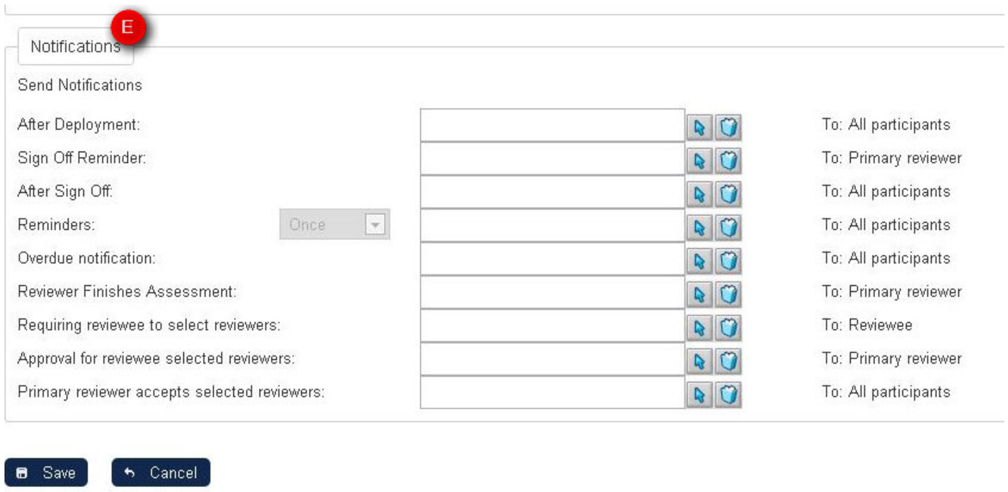
- Display reviewer ratings of peers, subordinates and additional managers
    - This setting controls whether the rating entered by the secondary reviewers will be displayed on the "Sign Off" page for primary reviewer and on the "Assessment Report" page for the reviewee.
- Display reviewee's previous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



New Access Control Settings

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

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

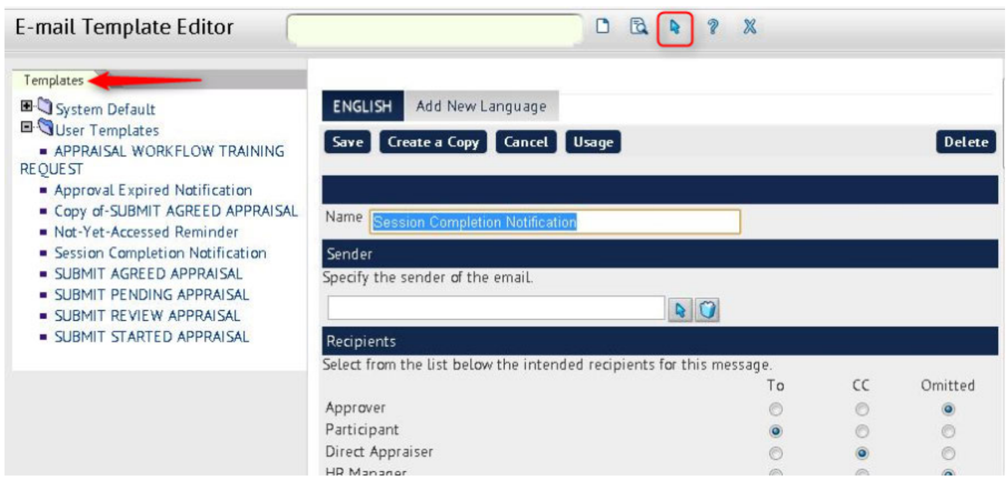


E. Competency Assessment Notifications
This feature allows the user to designate email templates for the following type of competency assessment notifications:

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

To assign an email template:

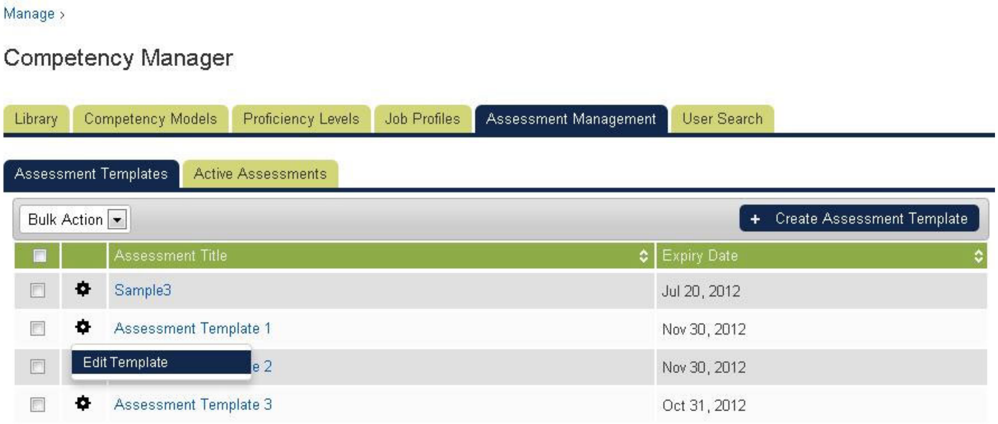
- Click the **Select** button of the competency assessment notification. The menu for selecting email template is displayed.
- Using the email template editor, select the email template from the list.
- Click the **Select** button to choose. This leads you back to the Assessment Template screen.



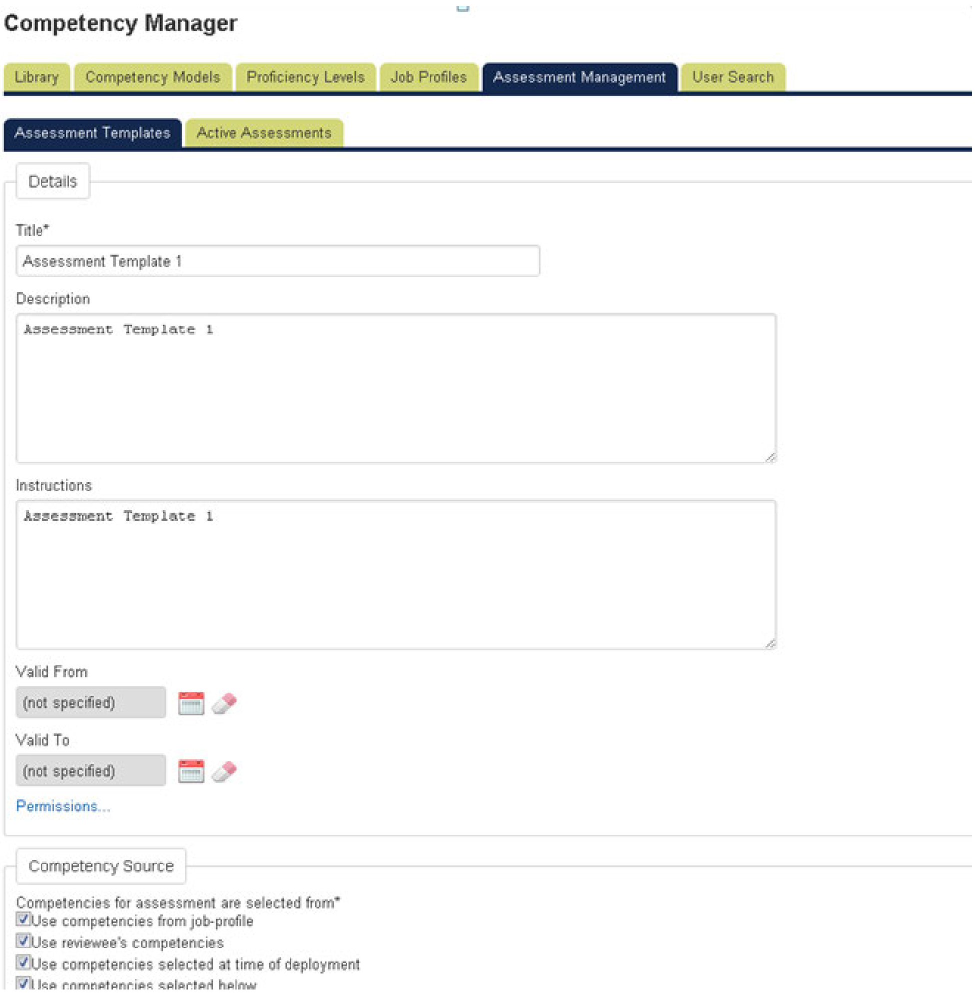
Note: To remove the assigned email, click the **Remove** button of the preferred competency assessment notification.

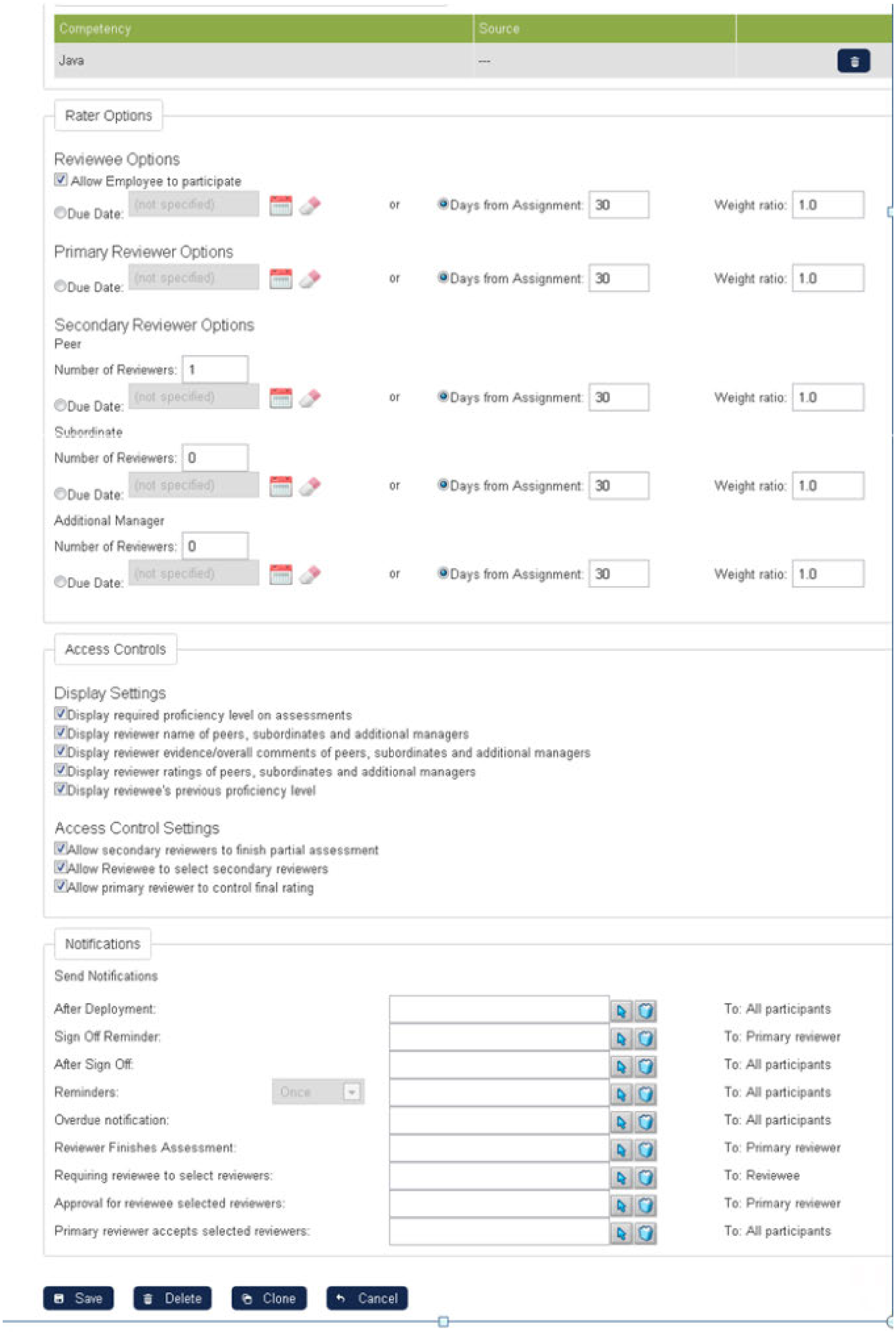
Modifying the Assessment Template Details

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



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



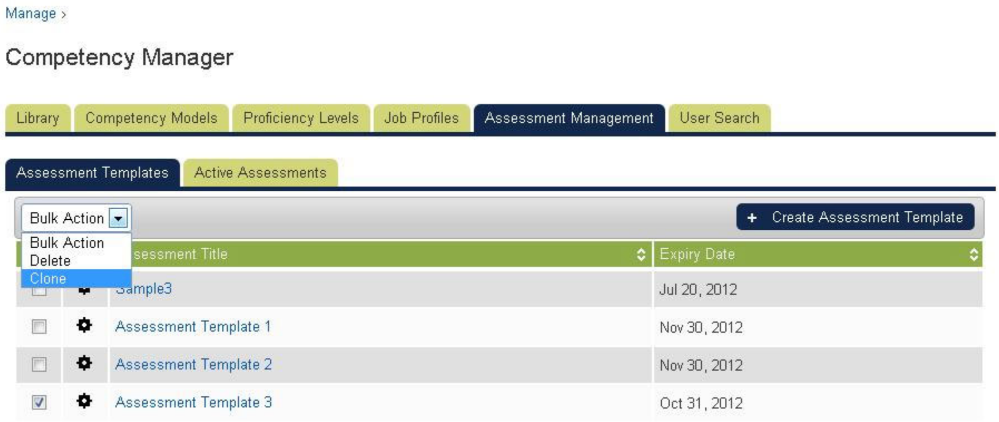


Once the changes have been made, click the **Save** button to keep the updates.

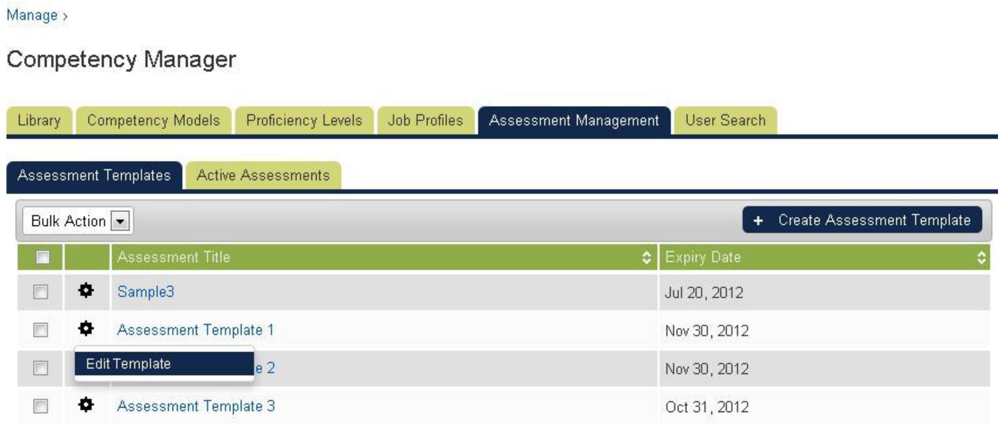
Cloning the Assessment Template

There are two ways to clone an assessment template:

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



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

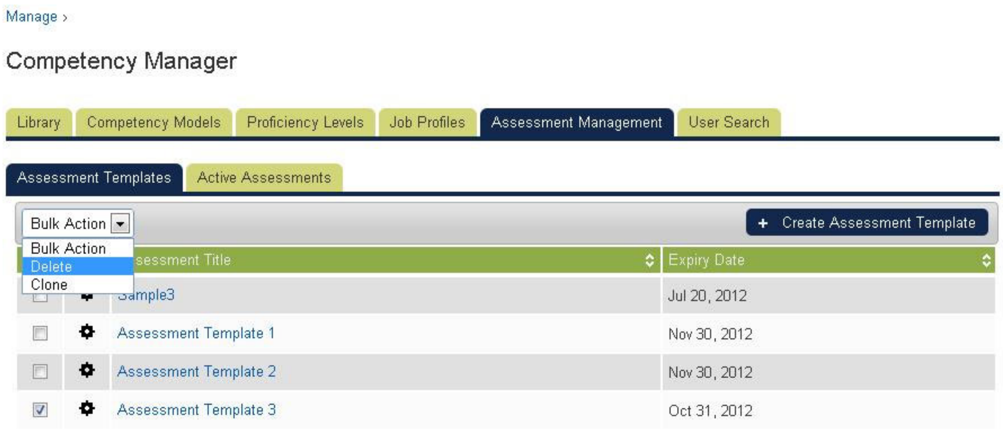


This opens the Assessment Template details. On the **Assessment Template Details** page, click the **Clone** button located at the bottom of the page.

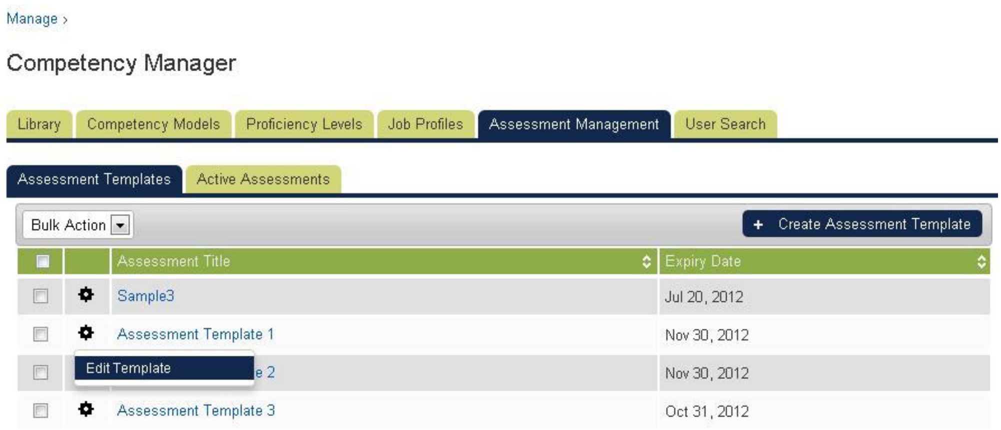
Deleting the Assessment Template

There are two ways to delete an assessment template:

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



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



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

Viewing the list of Active Assessments

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

The page displays the following information

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

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

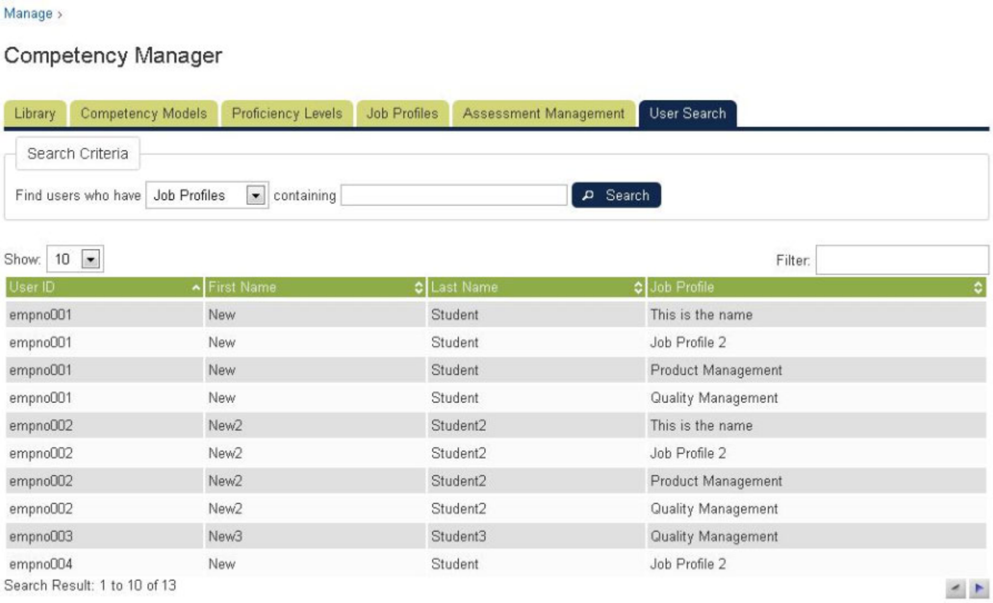
User Search

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

Search result can be filtered according to any the following:

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

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



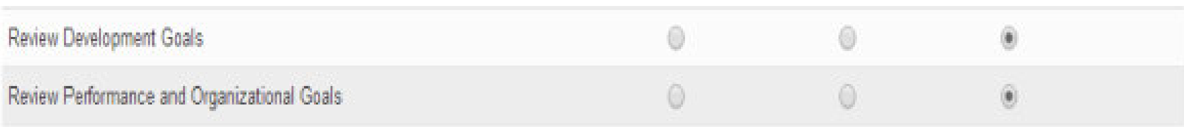
Goal Management

(available for Performance and Learning only)

Goal Management features allows the user to create hierarchical goal management

Goal Access Controls

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



The above are the new access controls for reviewing goals

Goal Program

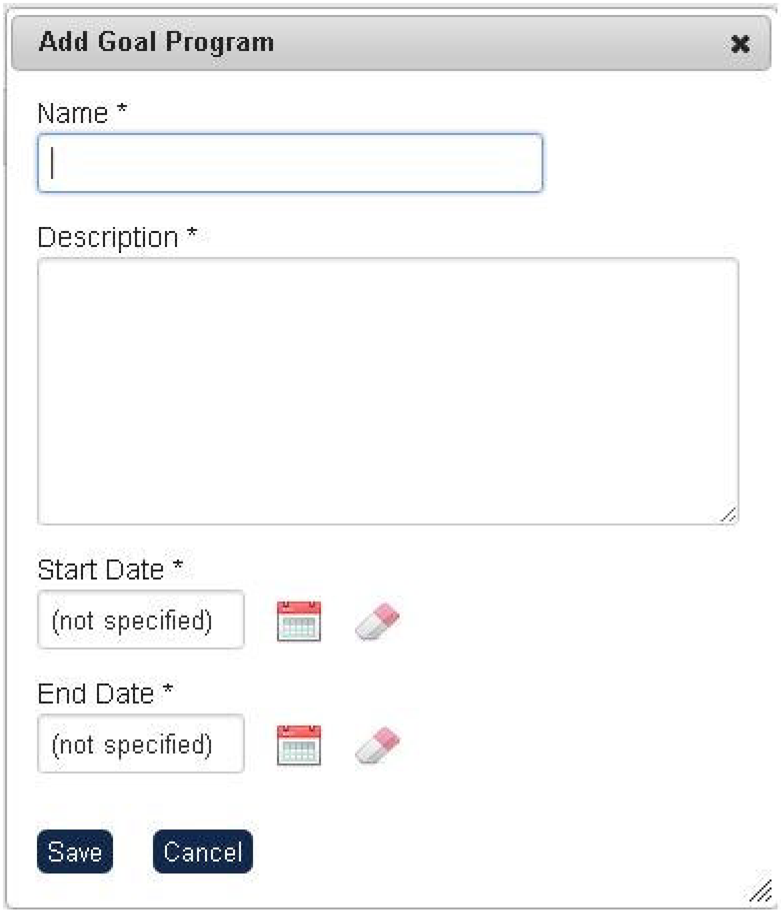
Creating a Goal Program

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

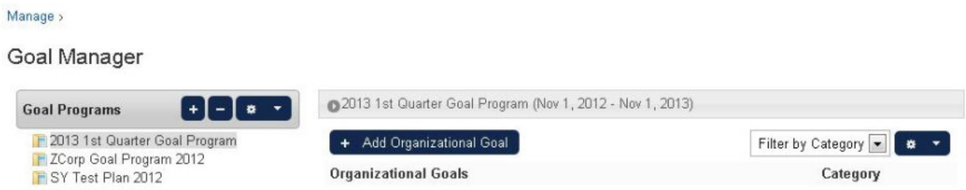
The *Goal Manager* main menu appears. Click the **Add Goal Program** button.

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

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



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

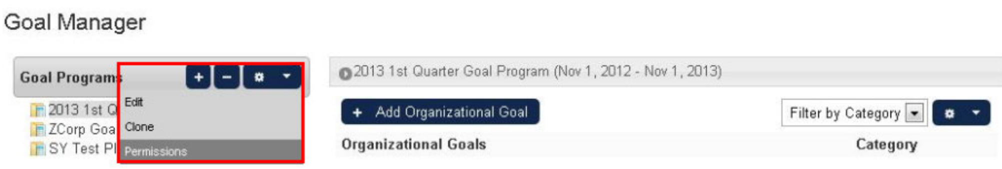


Setting Permission to a Goal Program

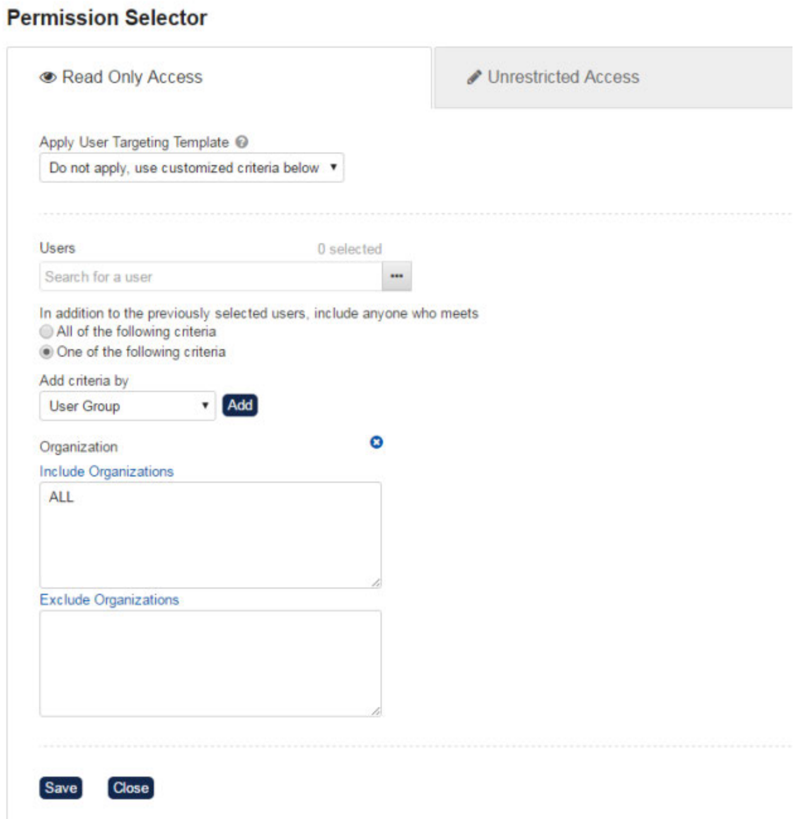
This section shows the procedures on how to set permission to a goal program.

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

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



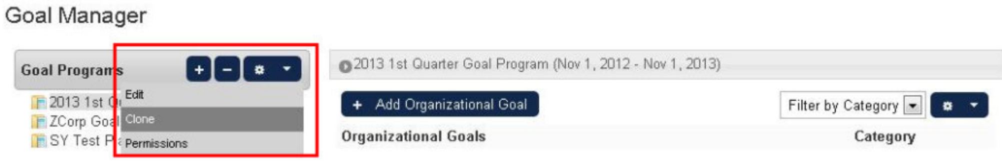
The **Permission Selector** pops up on a new window



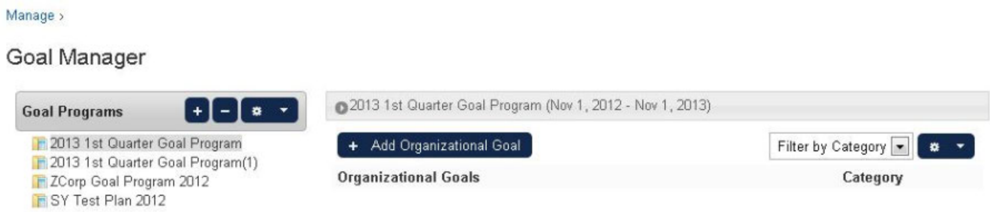
To know how to use this menu, refer to *Setting Permission to a Competency Model*.

Cloning a Goal Program

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



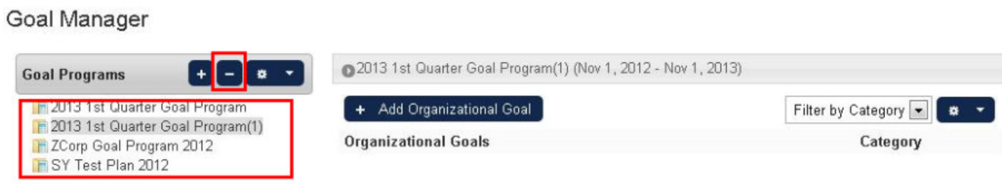
The screen refreshes and the cloned program is displayed with the original filename followed by a number enclosed in parenthesis. The number represents the number of cloned program. For instance, the first cloned represents (1), the second cloned is (2) and so on...



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

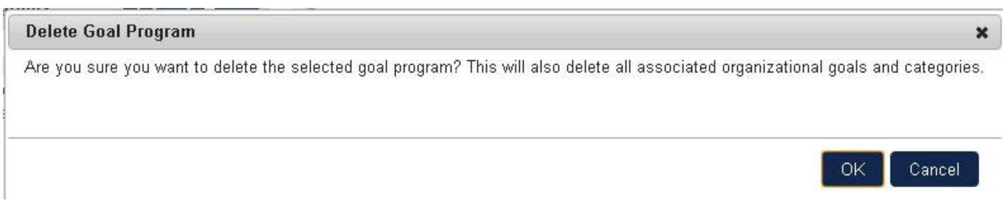
Removing a Goal Program

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



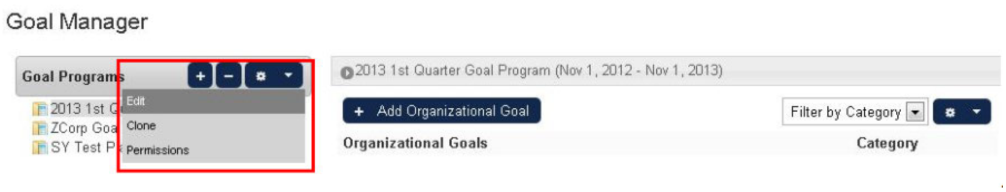
Note: Deleting the goal program will also delete all associated organizational goal and categories associated.

Click **OK** to proceed.



Editing a Goal Program

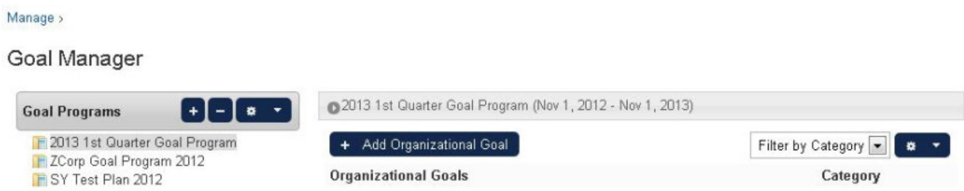
This section shows how to edit a goal program: Select the goal program you want to modify. Then click the **Gear** icon and then select **Edit.**



The menu for editing the goal menu appears.

Adding an Organizational Goal to a Goal Program

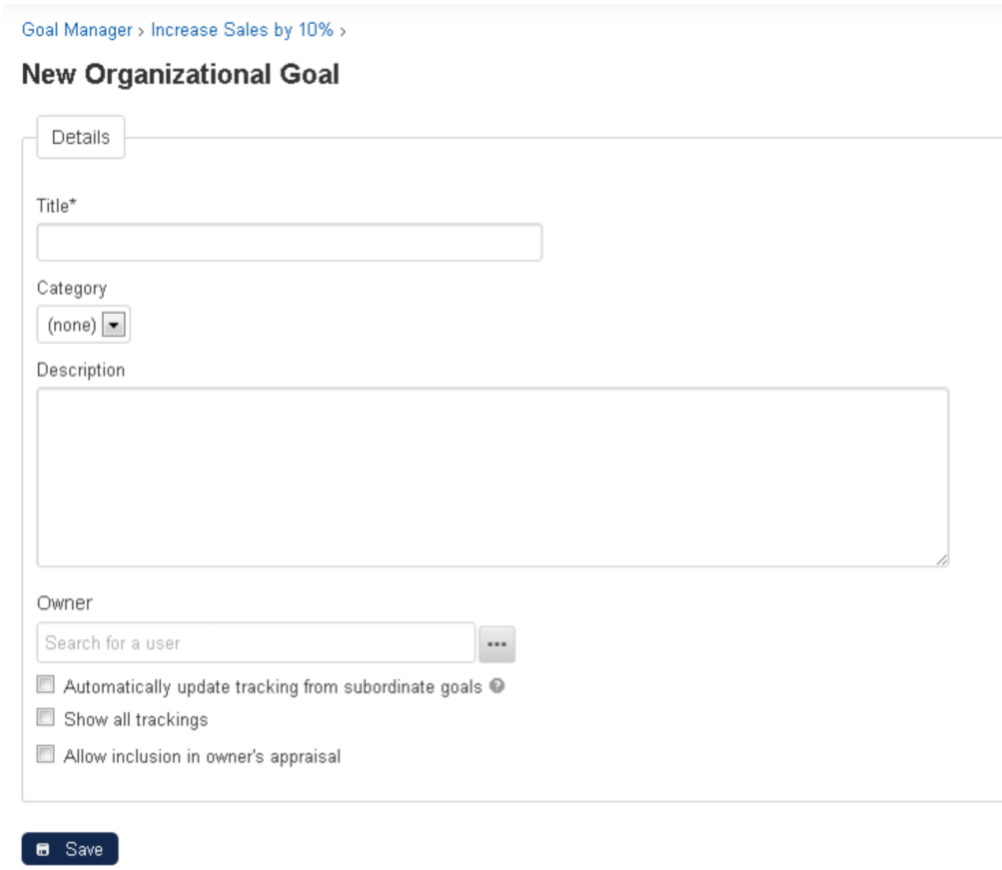
To add an Organization Goal to a Goal Program: Select the Goal Program where the Organizational Goal will be added. Click the **Add Organizational Goal** button.



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

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

Note: The Category field allows you to categorize the organizational goal. You can create categories using the category tools. See the next section to know the procedures on how to create category.



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

The *New Organizational Goal* will be listed.

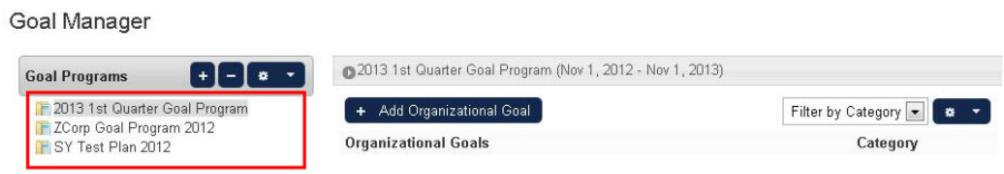
Note: You can add a sub-organizational goal by clicking the tool button of the organizational goal and then click **Add**.

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

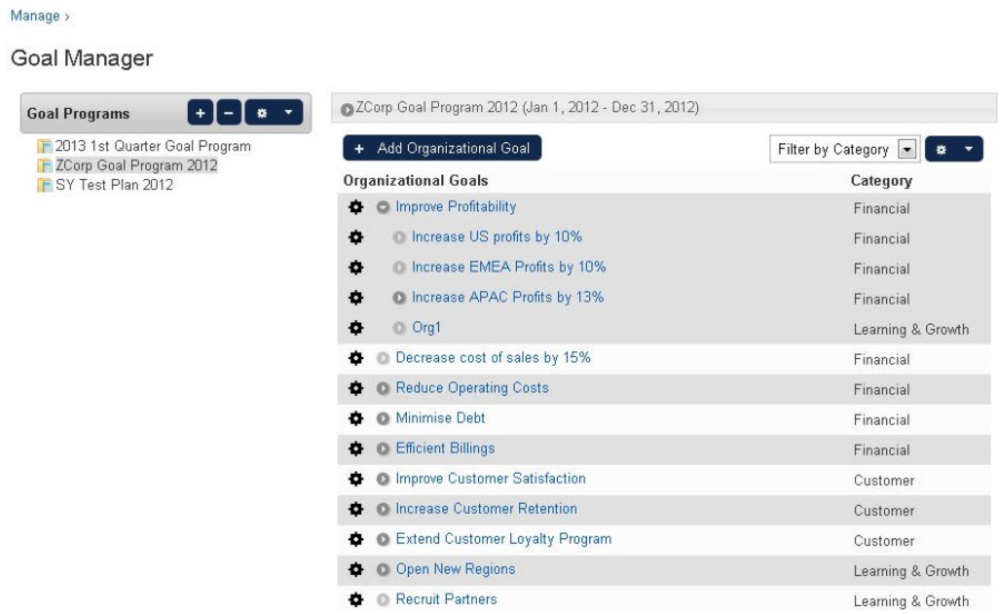
To display the sub-organizational click the expand/collapse button. Do the same step if you want to add another sub-organizational goal to a sub-organizational goal.

Listing the Organizational Goal

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



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



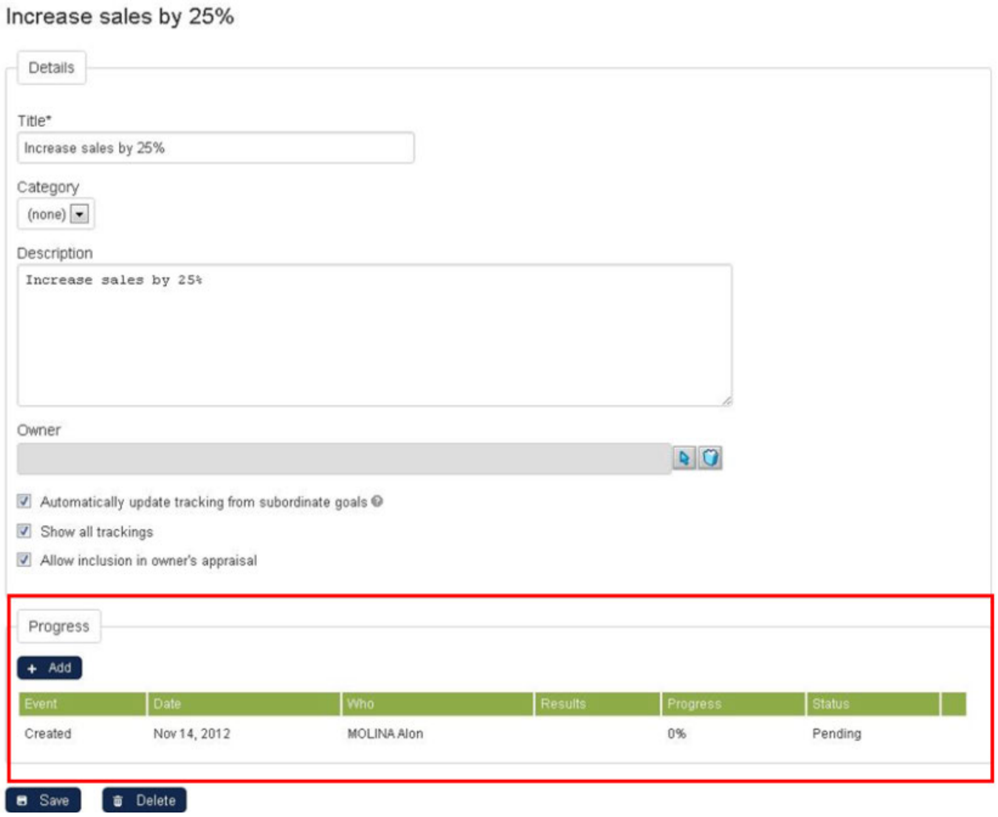
You can also view the list of the organization goals according to its category. The **Filter by Category** is the default option and lists all the organizational goals in the goal progam. The **<no category>** option only lists the organization goals that are not categorized.

Updating the Progress of the Organizational Goal

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

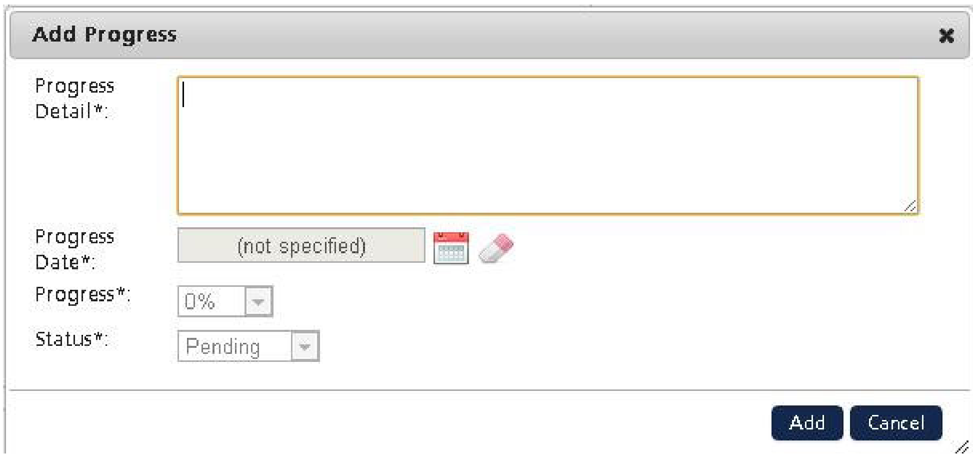
From the list, select the organizational goal you want to update.

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

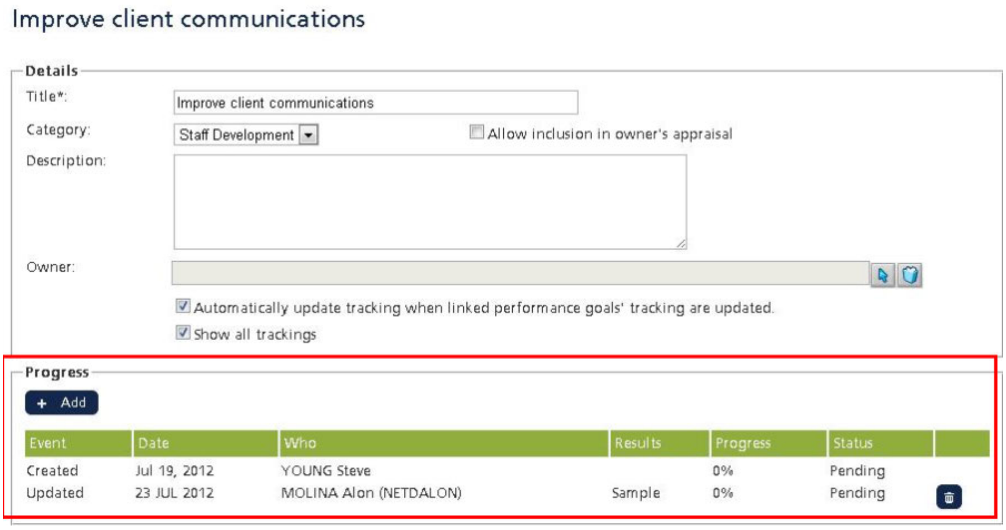


This opens the *Add Progress* screen. Enter the required parameters:

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



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



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

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

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

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

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

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

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

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

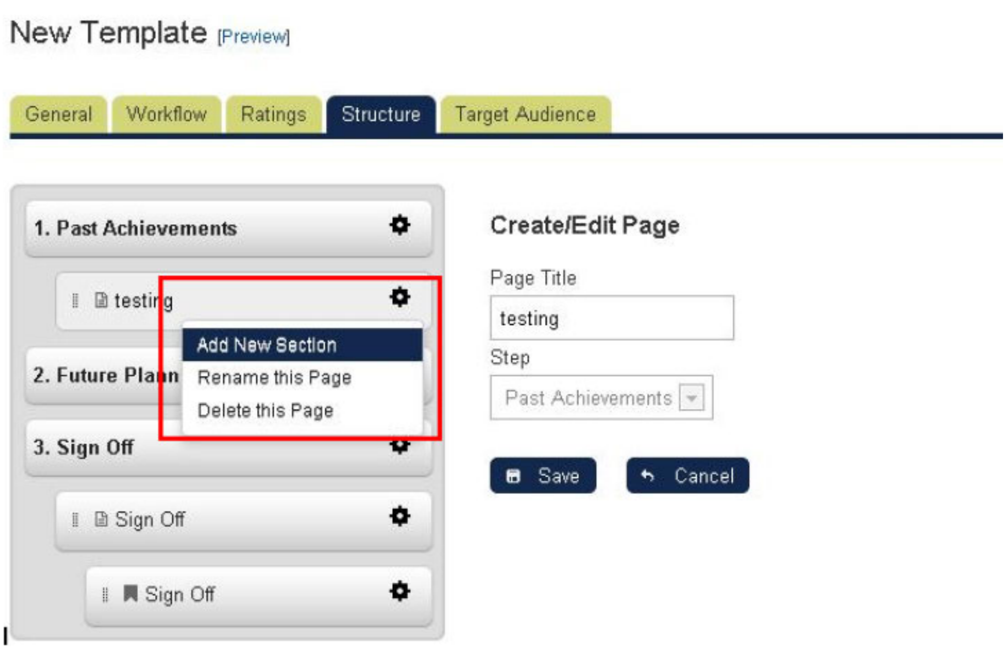
Goal Programs on Appraisal

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

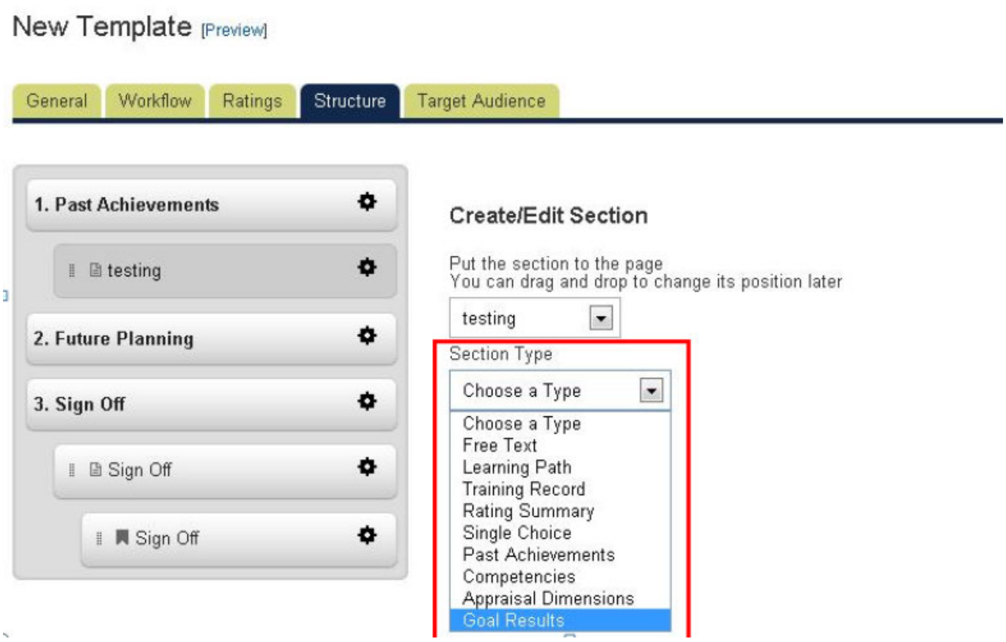
Setting Up Goal Result Section for Appraisal

Performance goals could be added to user appraisal past achievements for reviewing the performance later.
Note: User can define multiple goal sections within the same page.

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



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



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

Goal Selection Mode

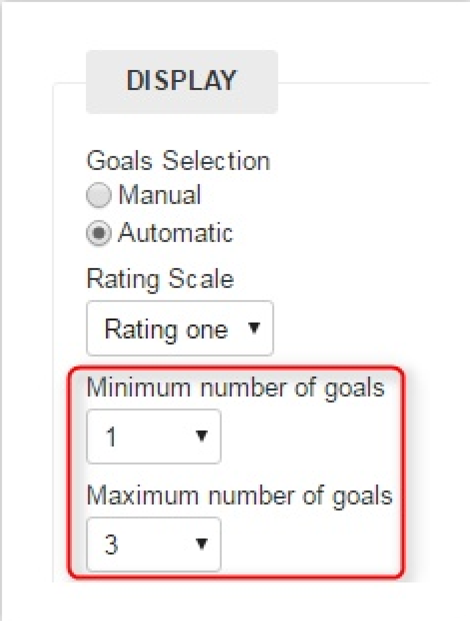
The goal selection mode determines how goals will be added to this section:

Automatic

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

Manual

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



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

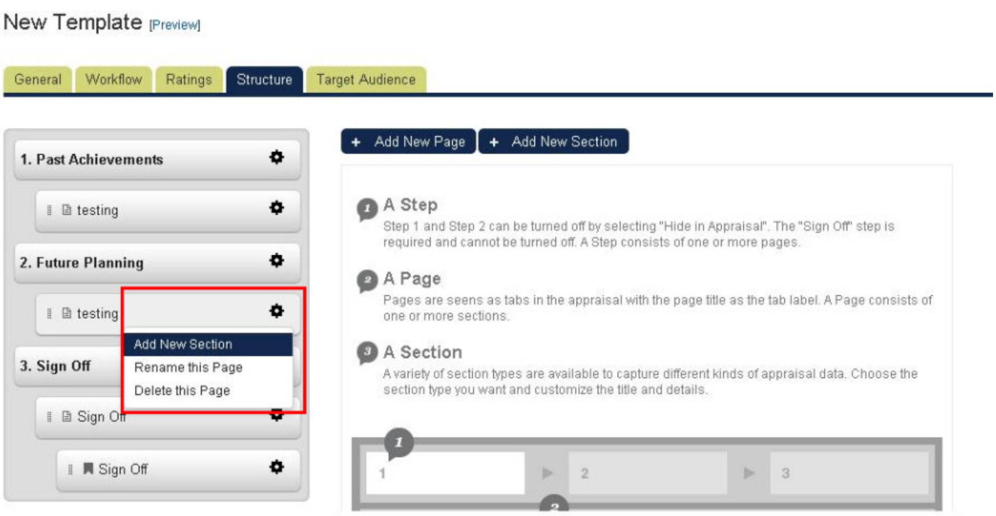
Note: These settings cannot be modified once appraisals based on the template have been started.

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

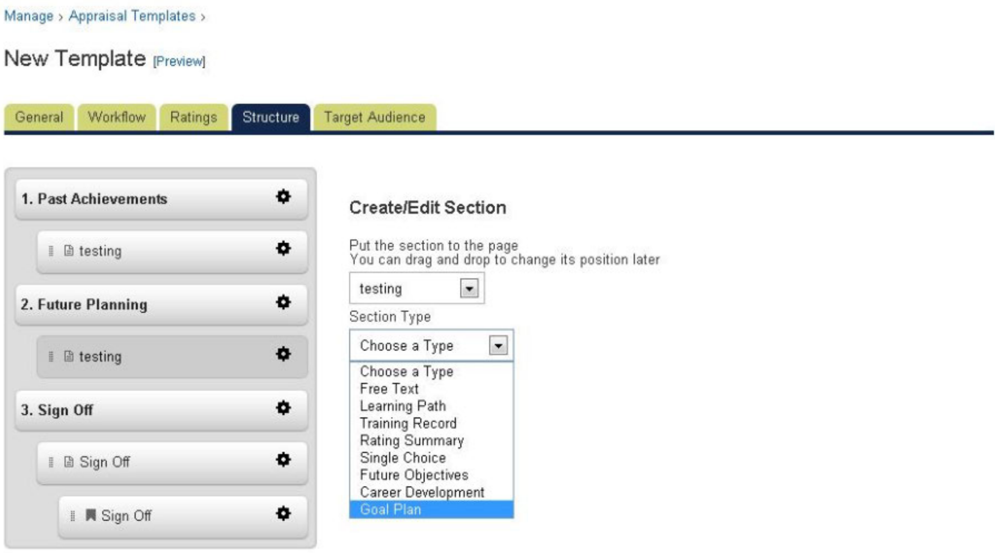
Creating a Goal Plan in the Appraisal Future Planning

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

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

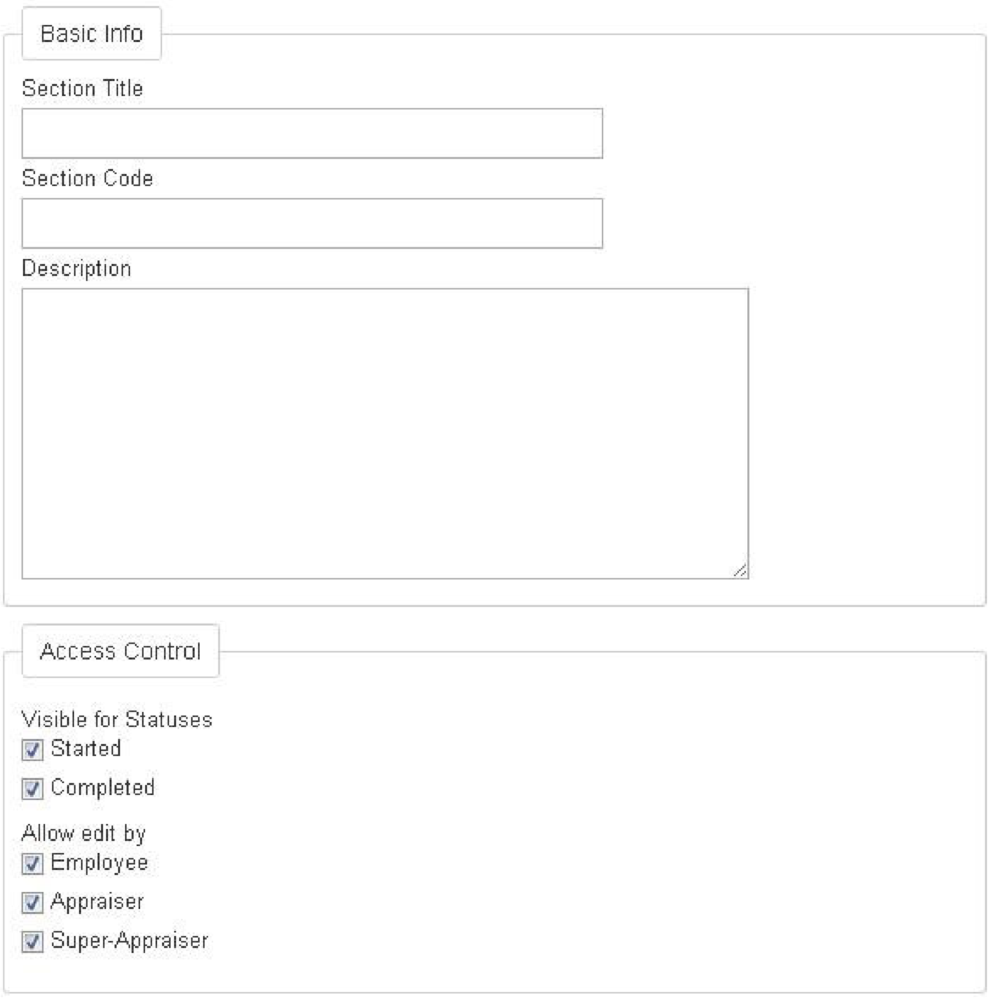


The screen refreshes and displays *Create/Edit Section* screen appears. Under the section type, select **Goal Plan**.



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

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

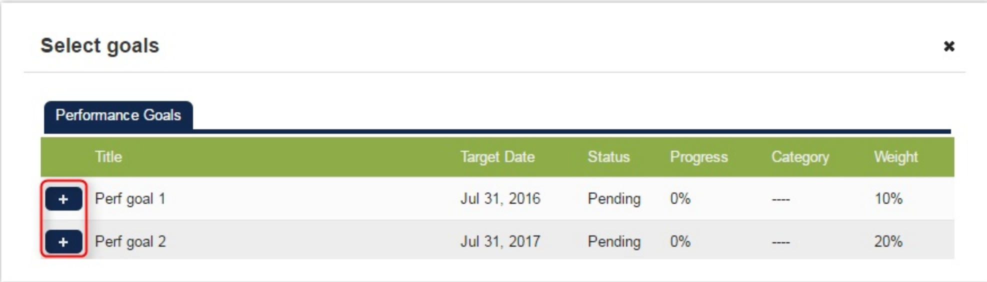


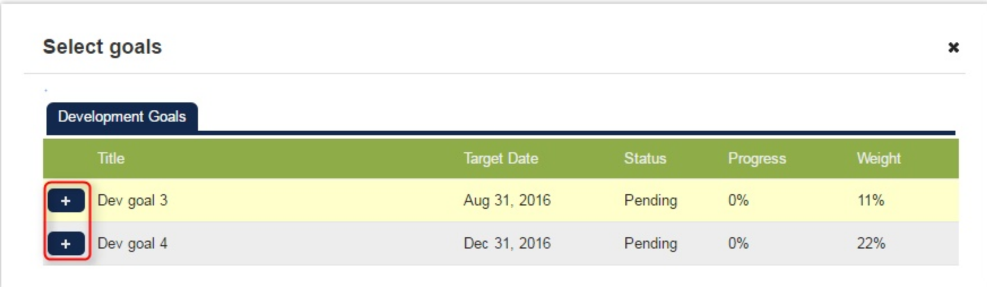
When complete, click the **Save** button to keep the record.

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

Adding Existing Goals to Appraisal Future Planning Sections

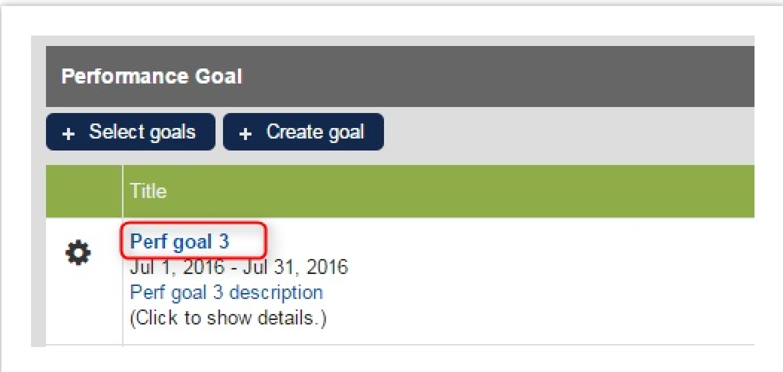
In Appraisal Future Planning, users can add existing goals to Performance Goal and Development Goal sections with the new "Select goals" button. A new dialog will be shown after clicking the select goals button and users can then add goals to the appraisal by clicking button on the respective "+" button.

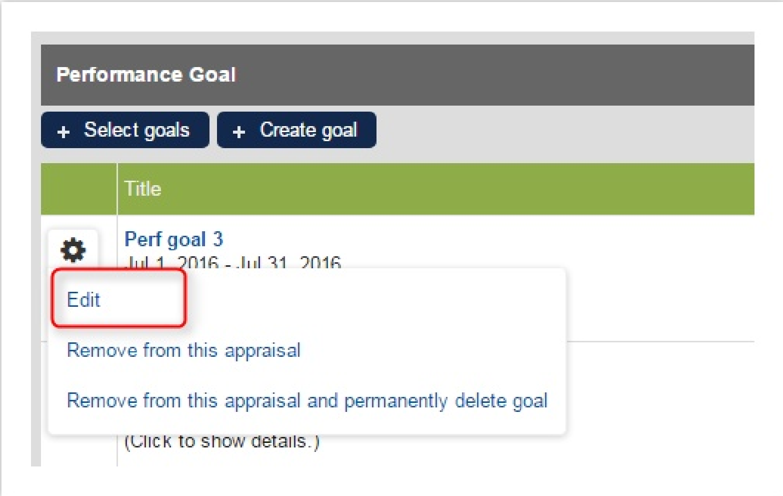




Editing Goals in Appraisal Future Planning Sections

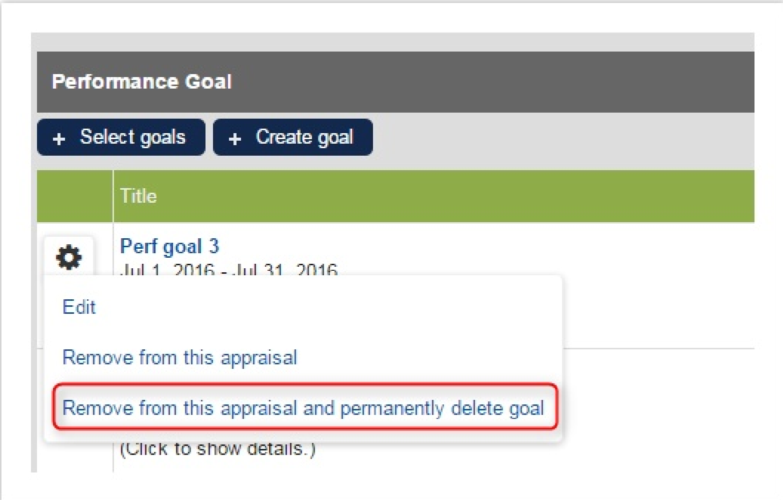
In Appraisal Future Planning, users can edit goals in Performance Goal and Development Goal sections. Users can click the link on goal title or use the "Edit" option under the gear button. A dialog is shown for the user to edit the contents.





Deleting Goals while Appraisal in Progress

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



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

Goal Category

Creating a Category

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

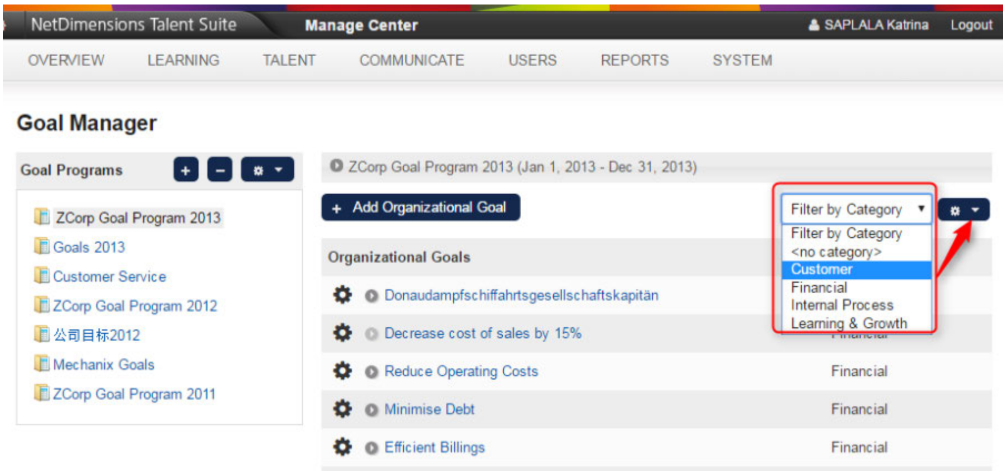
The *New Goal Category* screen appears on the screen. Enter the name of the goal category.

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

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

Modifying a Category

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

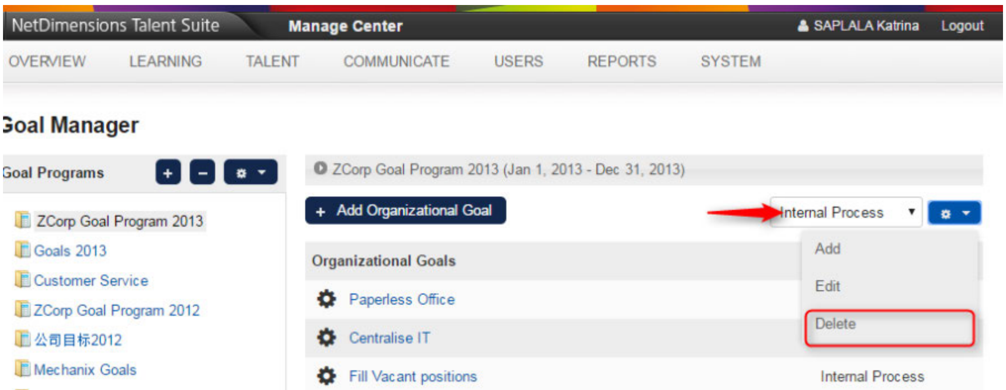


The *Edit Goal Category* appears on the screen. Modify the goal category name.

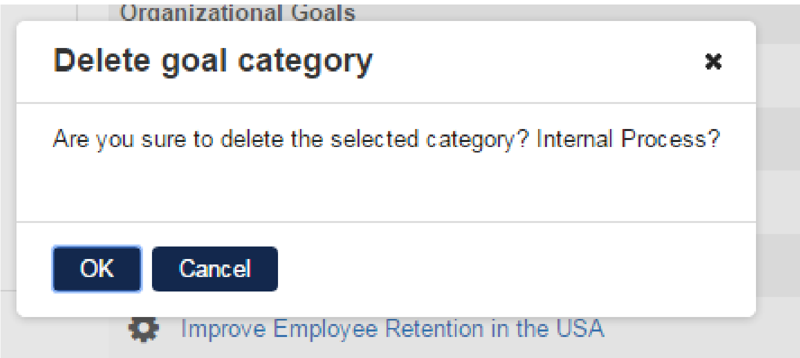
Click the **Save** button to keep the changes.

Removing a Category

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

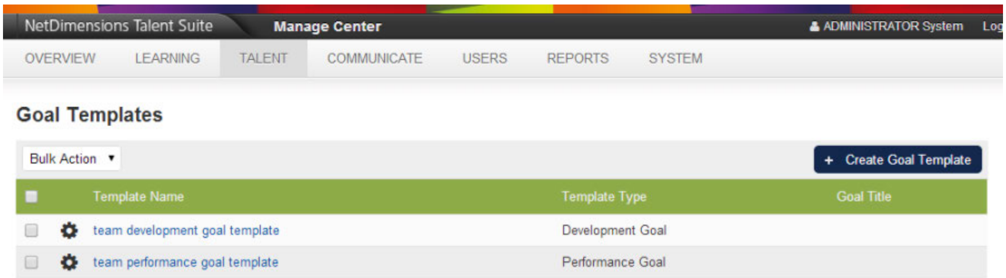


The *Delete Goal Category* appears on the screen. Click **Ok** to remove the category otherwise click **Can cel** to cancel the deletion of the goal category.



Goal Templates

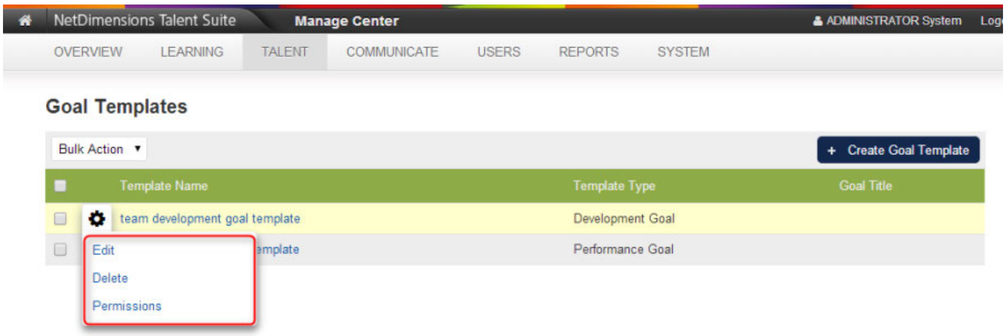
Goal template ease the creation of performance and development goals. Users can go to the Goal Template page through the manage center. Upon clicking on the 'Goal Templates' link, a listing page will be shown:



This page lists all Goal Templates the user has access to

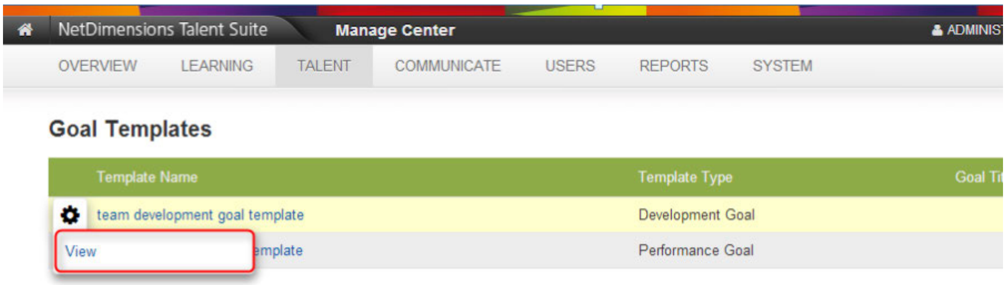
If a user has 'Unrestricted' access to Goal Templates, he can:

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



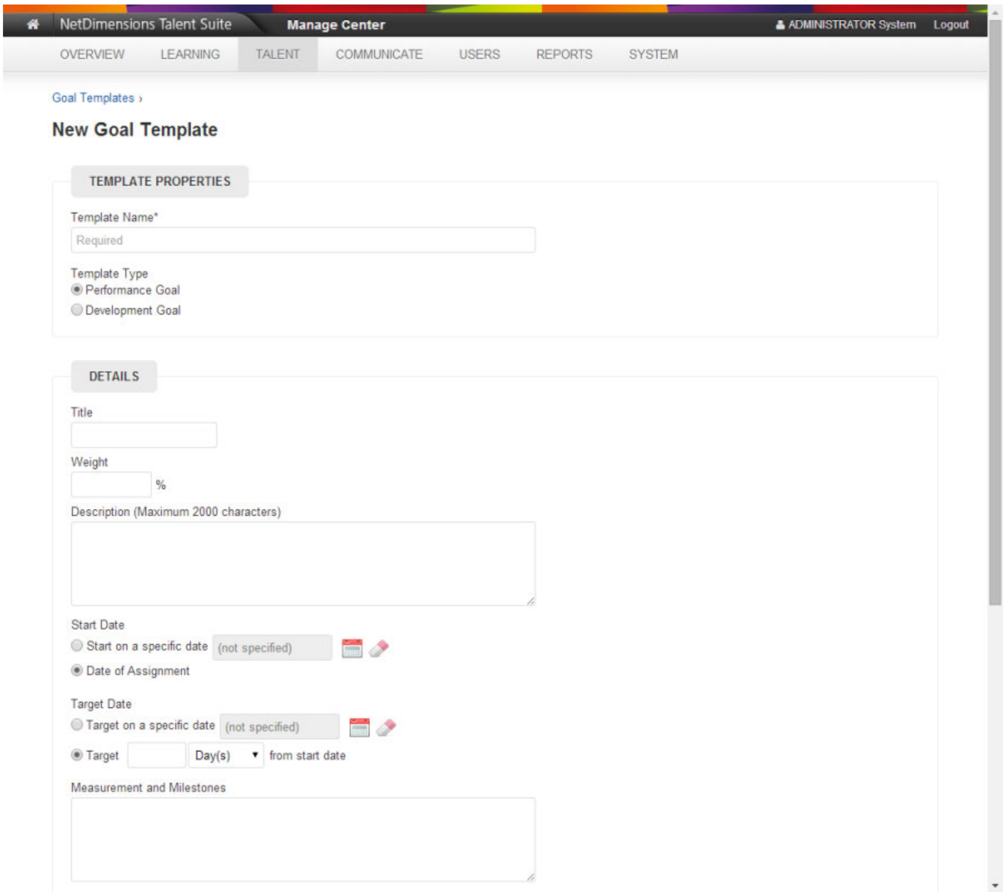
The User can edit, delete, and edit the permission of goal templates if he has 'Unrestricted' Goal Template access control

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



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

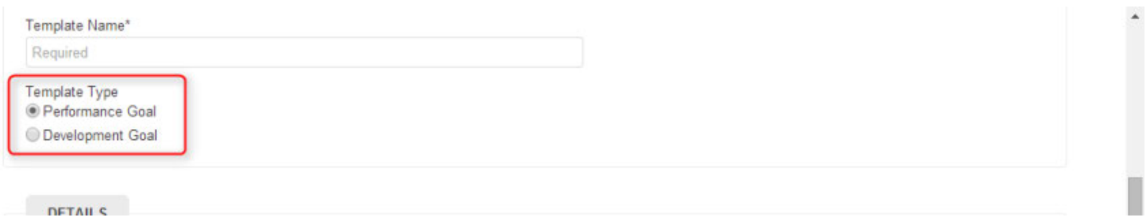
Clicking on 'Create Goal Template' will direct user to a new create goal template page

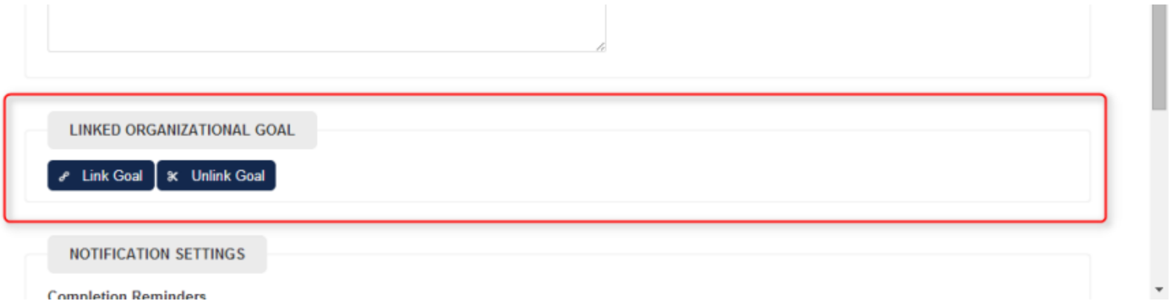


Goal Templates support all goal properties. But please note that:

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

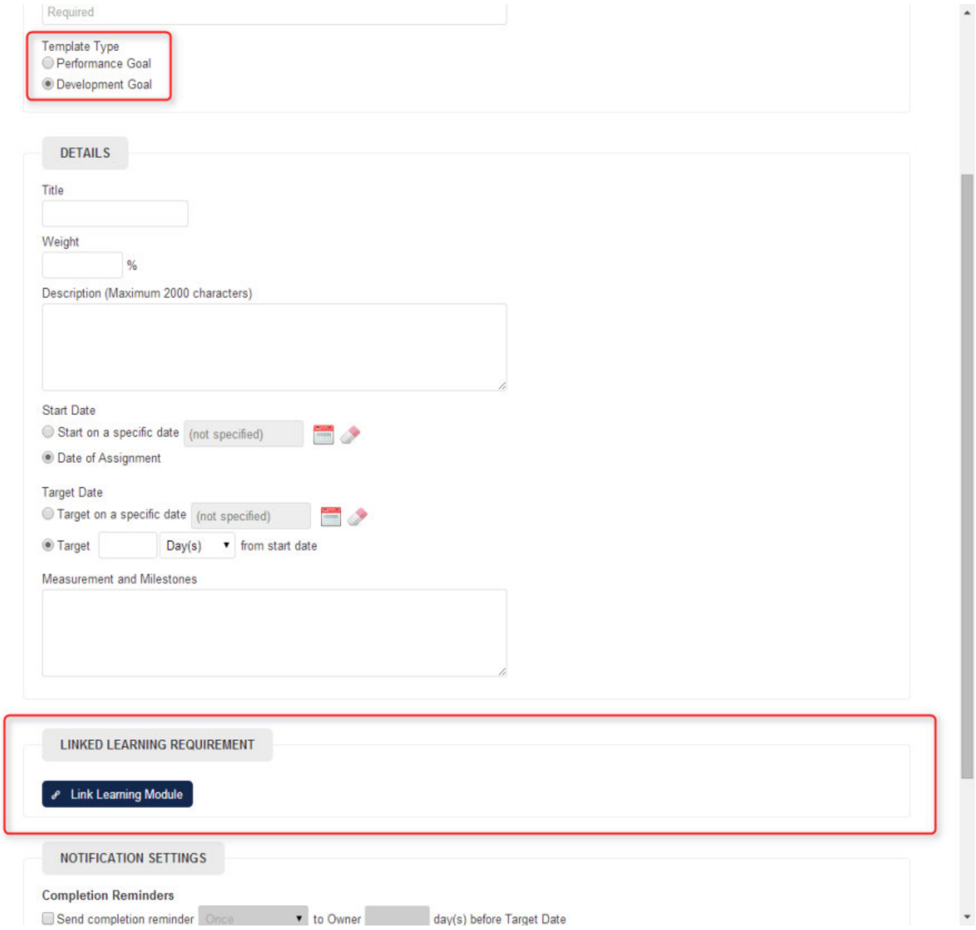
If a goal template is for 'Performance goal', the 'Linked Organizational Goal' section will be displayed





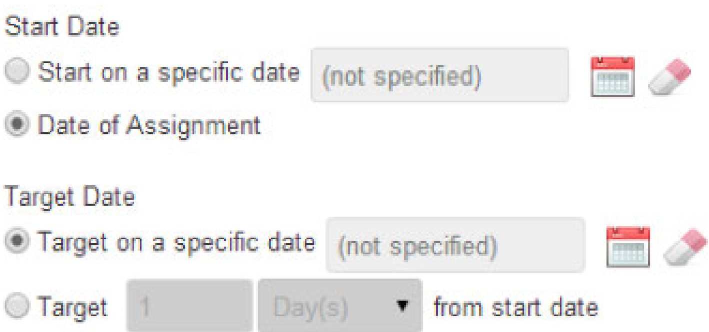
Linked Organizational Goal' section will appear if 'Performance goal' template type is selected

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



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

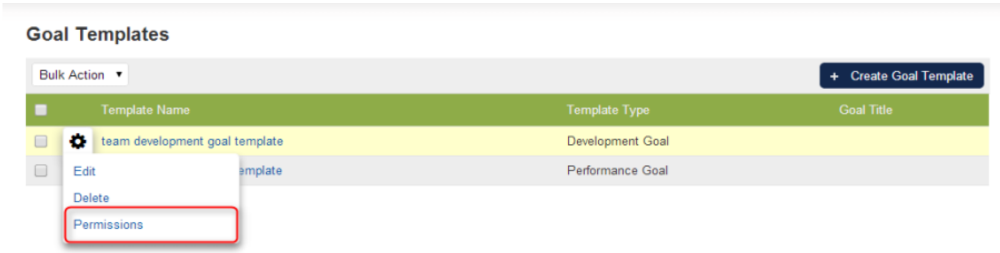
2.'Start date' and 'Target date' are configurable



The actual date will be calculated once the template is applied.

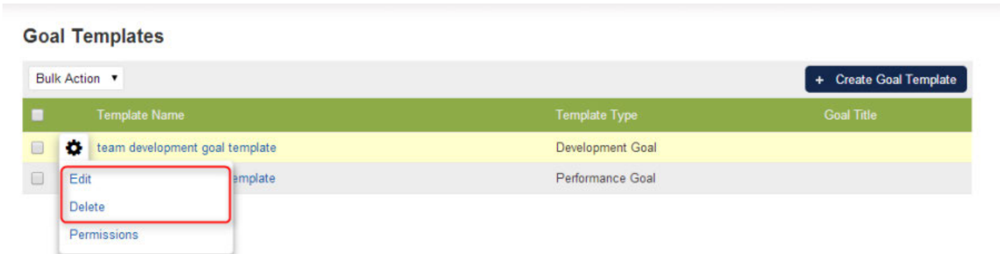
Permissions of Goal Templates

Permission can be set for each goal template



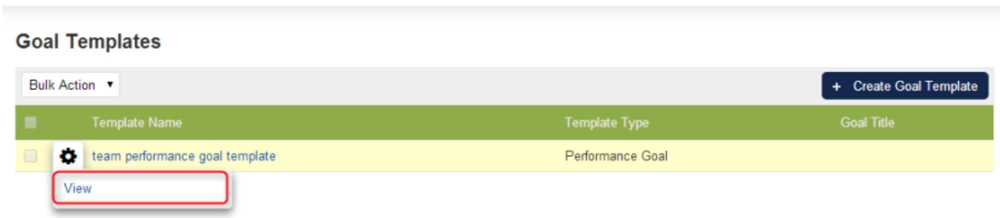
Set permission for each goal template

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



Available actions for 'Write' permission

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



Available actions for 'Read' permission

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

Apply Goal Templates when Assigning Goals

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

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

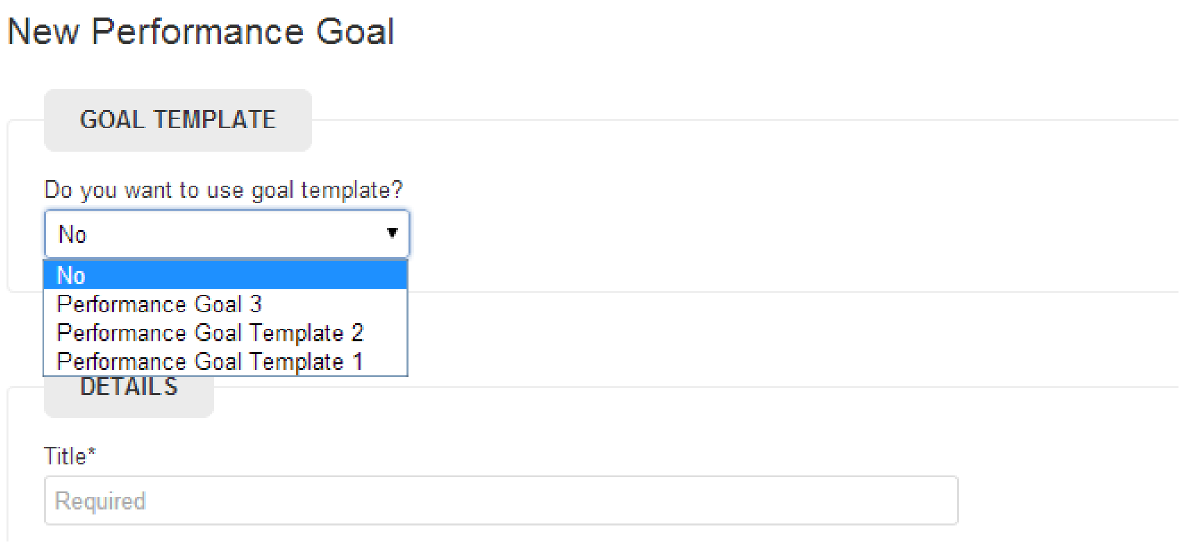
- Takes Start Date depending on whether it is "Fixed" or today
- Calculates a target date if assignment specifies "X Time From Start Date"

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

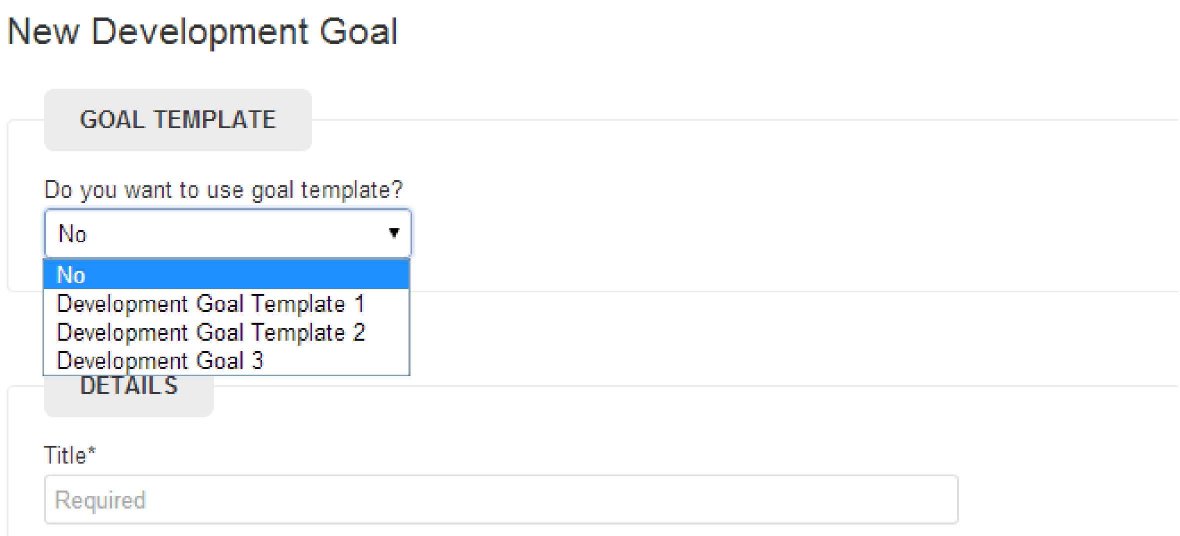
- My Goals
- Review CDC

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

My Goals:

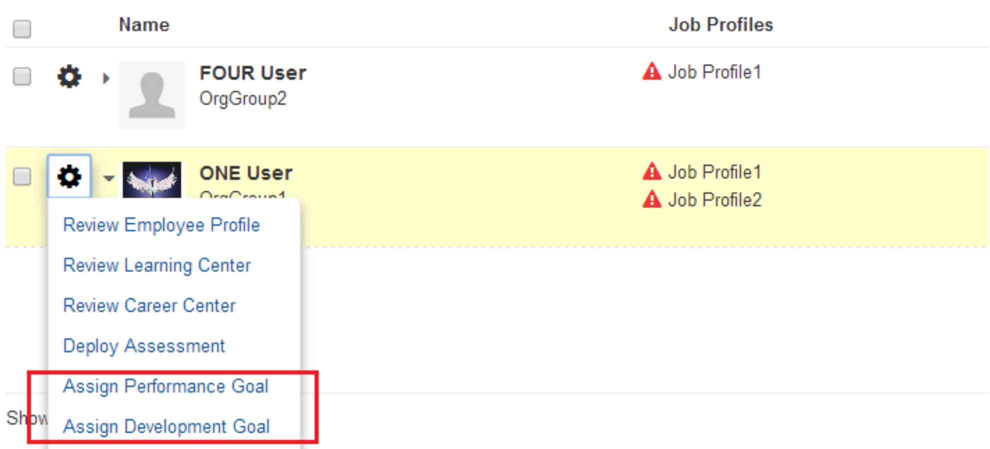


Performance Goal Template selector on My Goals



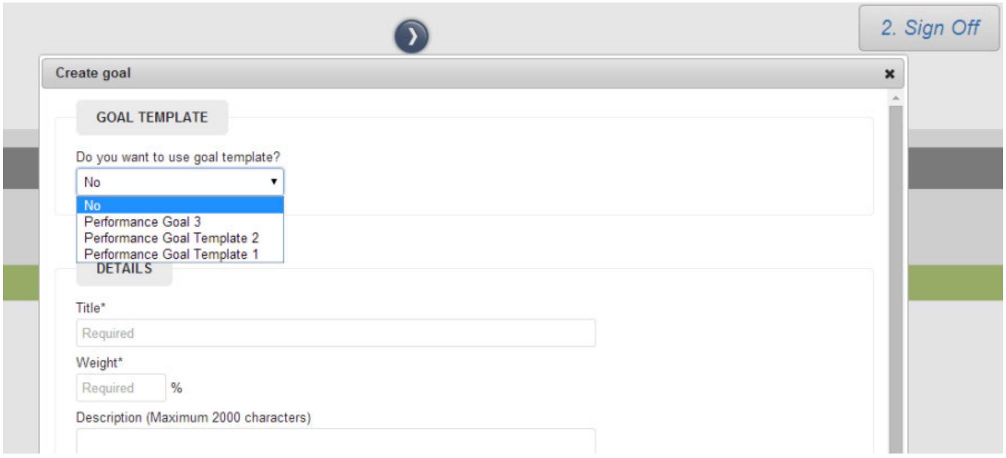
Development Goal Template selector on My Goals

Review CDC:



Assign Goal To a user on Review CDC

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



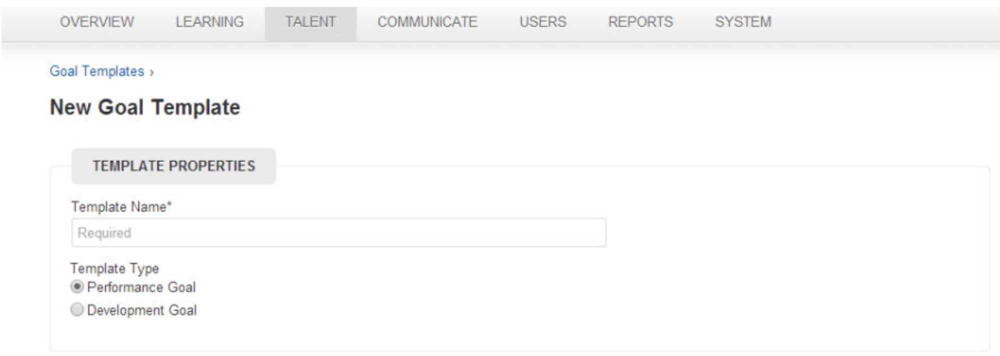
Performance Goal Template selector on Appraisal-Goal Result

Note that the Default is not using any templates.

License Checking on Goal Templates

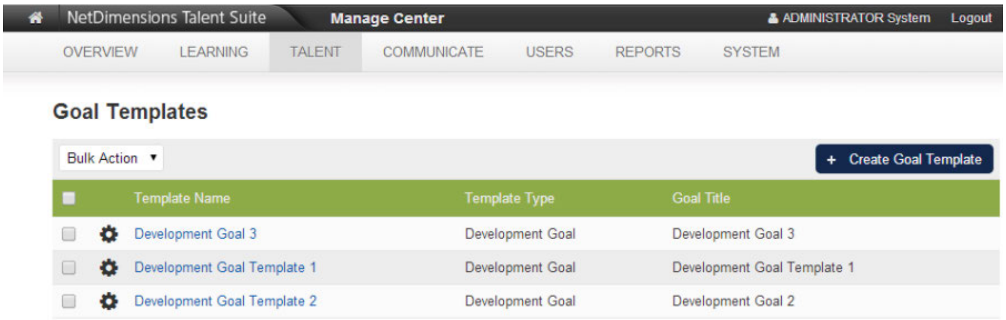
Development Goals Templates are available on Learning licenses. Performance Goal Templates however, are disabled for non-Performance licenses. Goal-related system configuration options are available for Learning licenses (provided that organizational goals have not been changed). For Performance license,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

Goal Templates listing page for Performance license

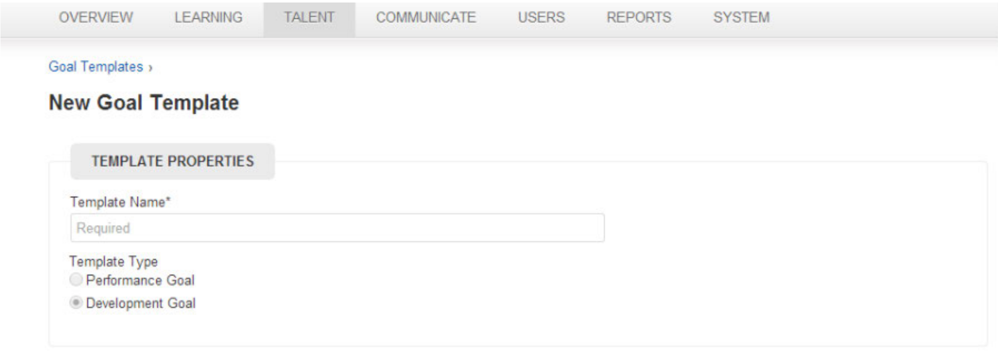


Create/Edit Goal Template page for Performance license

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



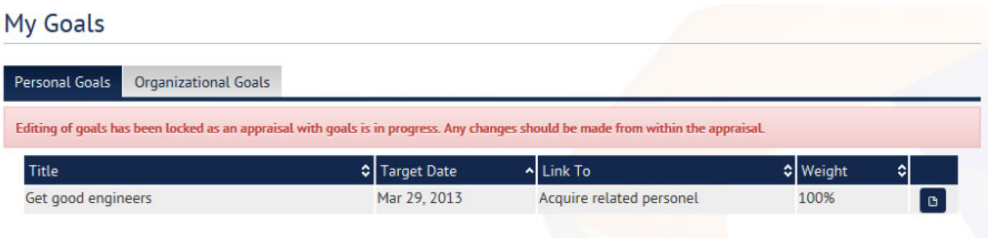
Goal Templates listing page for Learning license

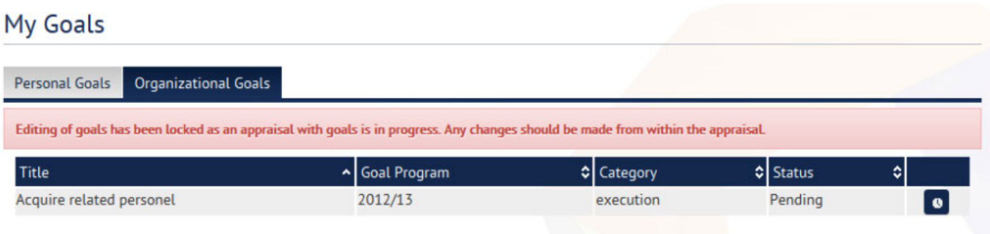


Create/Edit Goal Template page for Learning license.

Locking of Goals

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

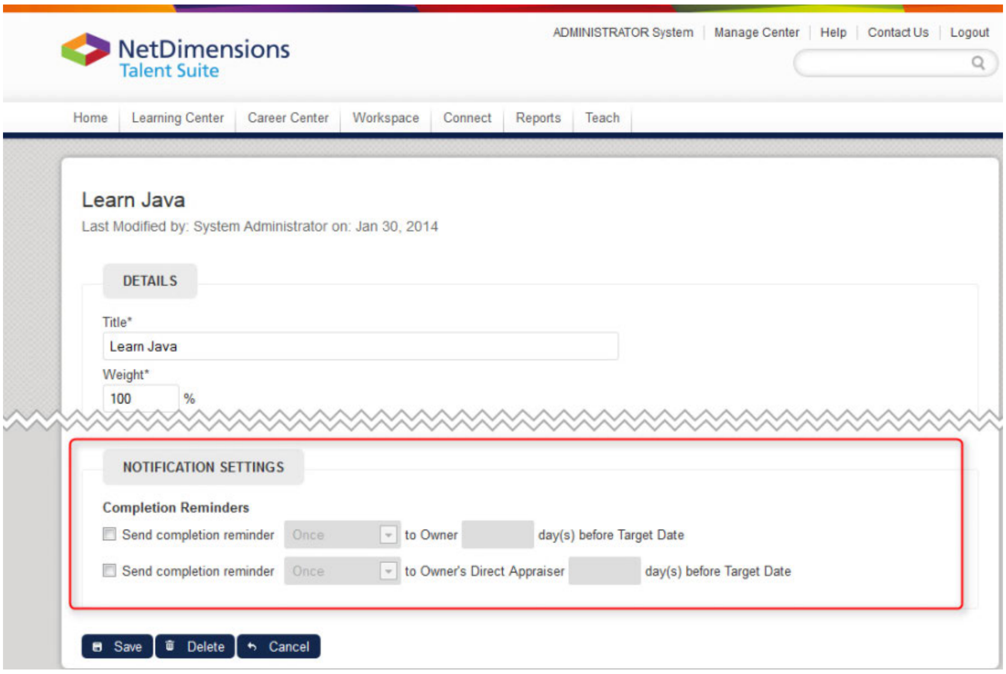




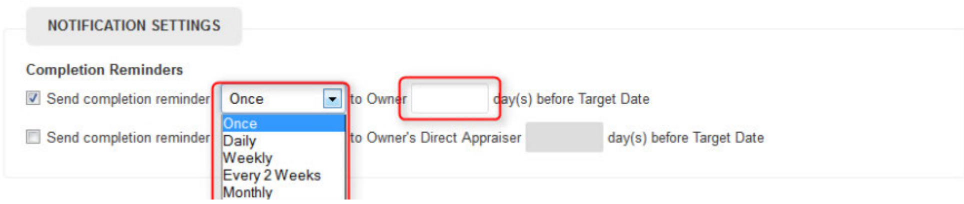
However, the locking does not apply inside an appraisal and user can create/edit his performance goals or add progress tracking records for organizational goals. This is allowed because there may be situations user needs minor changes on his goals or even adding a new goal to better reflect his past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

Completion Reminders for Goals

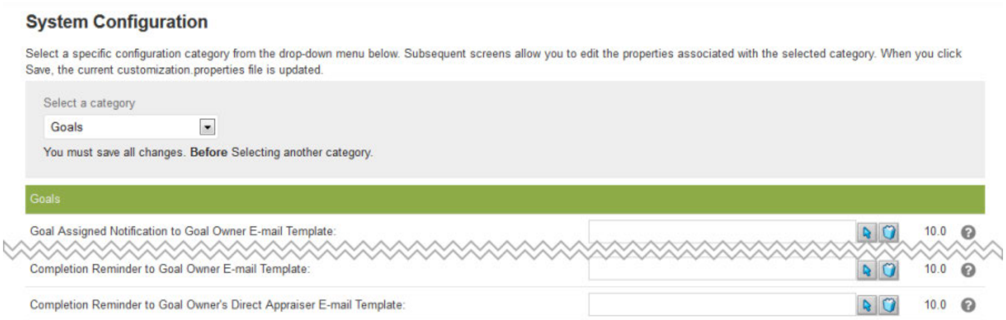
Completion reminders for goals have been added in both Performance Goals and Development Goals input page. Users can now configure completion reminders for goal owner or owner's direct appraiser.



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



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

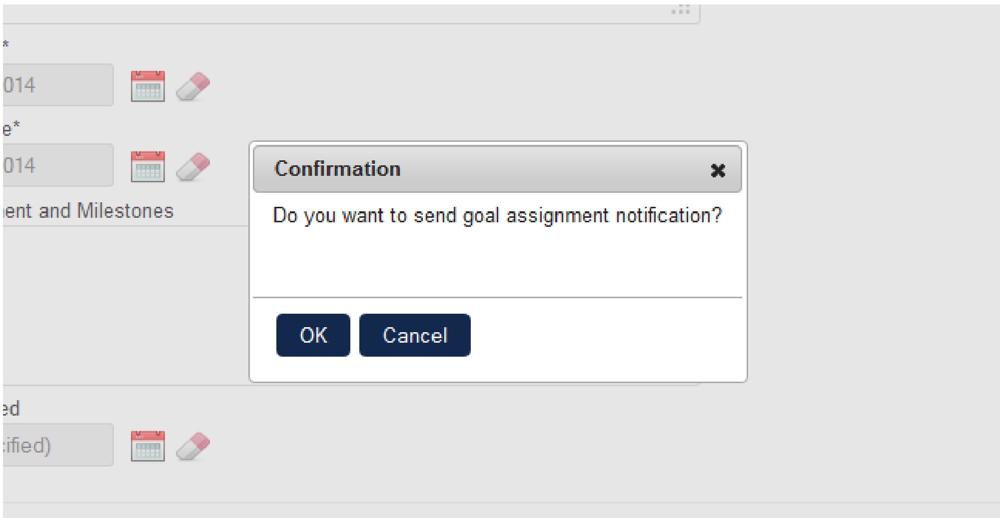


Goal Assignment Notification

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

Notification may be triggered when:

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



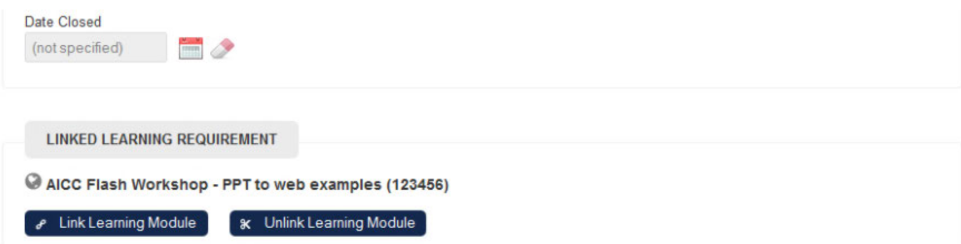
When there is a notification warranted situation, the assigning person will be prompted to confirm if notification should be sent.

Goal related e-mail parameters include:

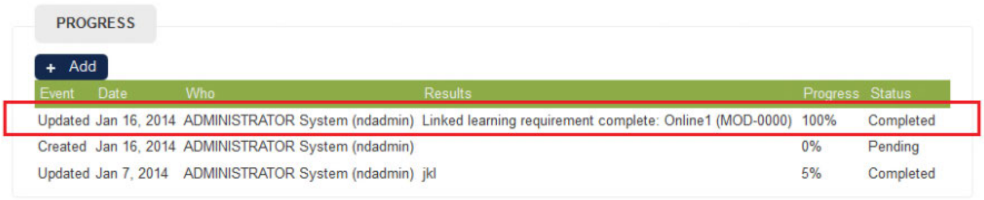
- Development Goal Linked Learning Requirement
- Goal Description
- Goal Latest Progress
- Goal Measurement and Milestones
- Goal Start Date
- Goal Target Date
- Goal Title
- Goal Type
- Goal Weight
- Linked Goal Program Name
- Linked Organizational Goal Title

Linking Modules to Development Goals

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



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



PROGRESS

+ Add

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

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

Performance Appraisals

(available for Performance only)

Configurable Appraisal Forms

A template consists of three parts:

- **Past Achievements**
- **Future Objectives**
- **Sign Off**

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

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

An appraisal template can have one of two statuses:

- Active means any user starting a new appraisal will be presented with a form based on this template. Only one template can be active at any point in time - activating a particular template will automatically cause the other templates to be set to inactive.
- Inactive means that the template exists but will not be used by users currently starting new appraisals. Templates with this status will typically be one of the following:

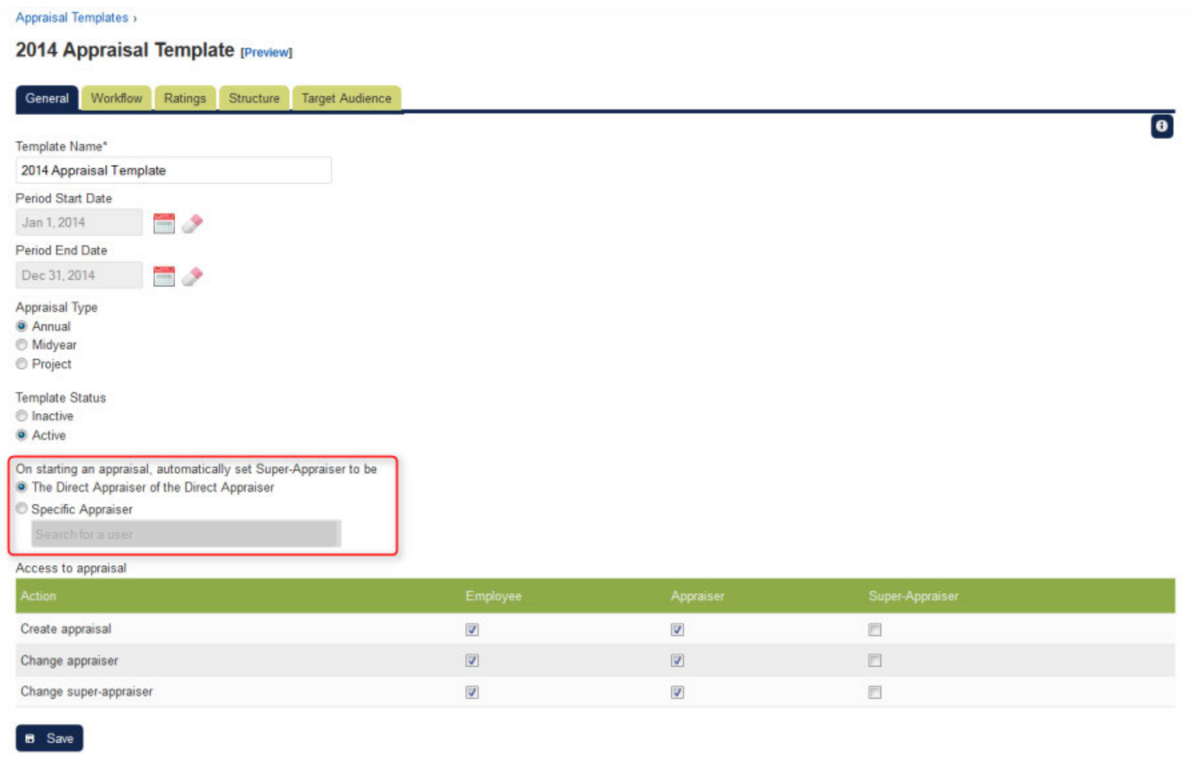
1. Templates that are currently being configured and not yet ready for use
2. Templates that were previously active and have users' appraisals associated with them

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

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

Templates. then **Create Template**.

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



Anatomy of an Appraisal Template

A template will have the following parts:

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

	Section Type	Past Achievements	Future Planning	Sign Off
1	Career Development	✗	✓	✗
2	Free Text	✓	✓	✓
3	Future Objectives	✗	✓	✗
4	Learning Path	✓	✓	✓

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

Appraisal Flows

A template will take one of two flows:

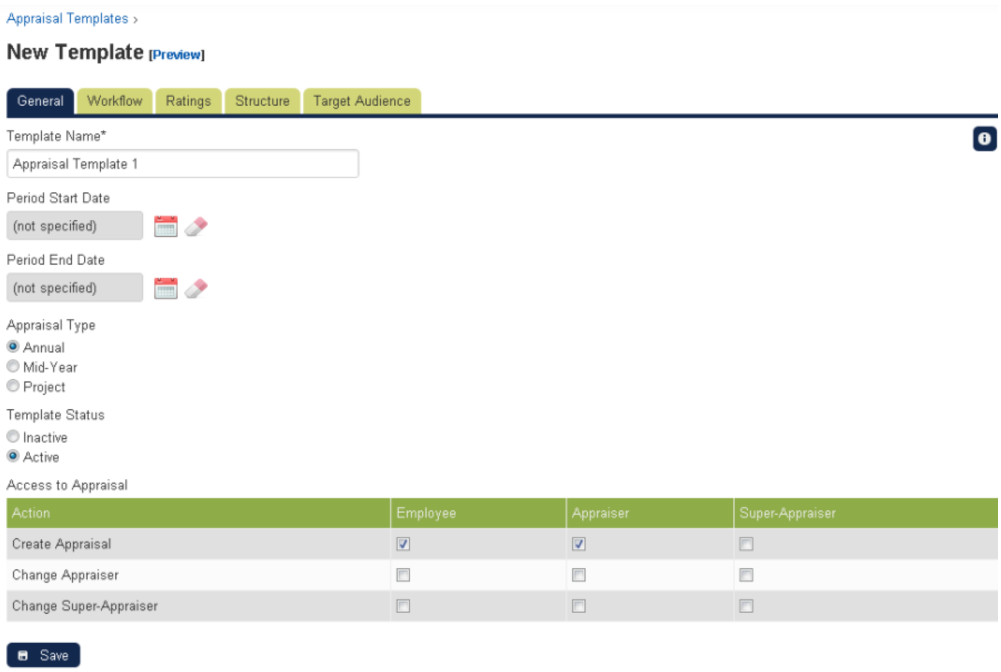
- "Basic": Started - Completed
- "Complex": Started - Pending - Review - Agreed - Completed

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

Configuring General Properties of an Appraisal Template

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

The Appraisal Template Editor screen opens in a new window.



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

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

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

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

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

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

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

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

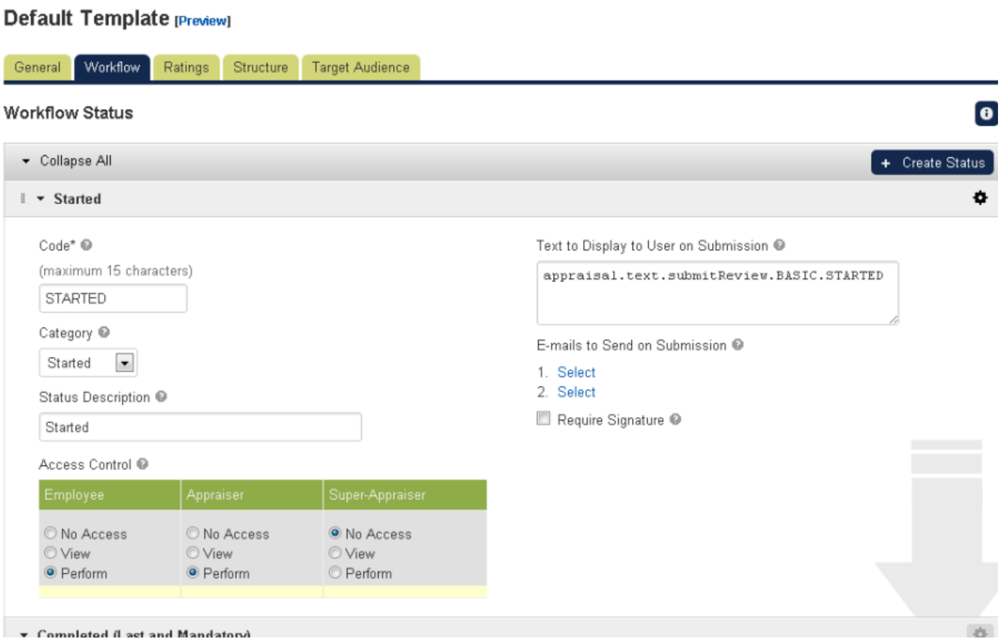
Configurable Appraisal Workflow

The appraisal process will differ across organizations and perhaps even across different departments of the same organization. Each template can have its own workflow, catering for a wider range of appraisal processes.

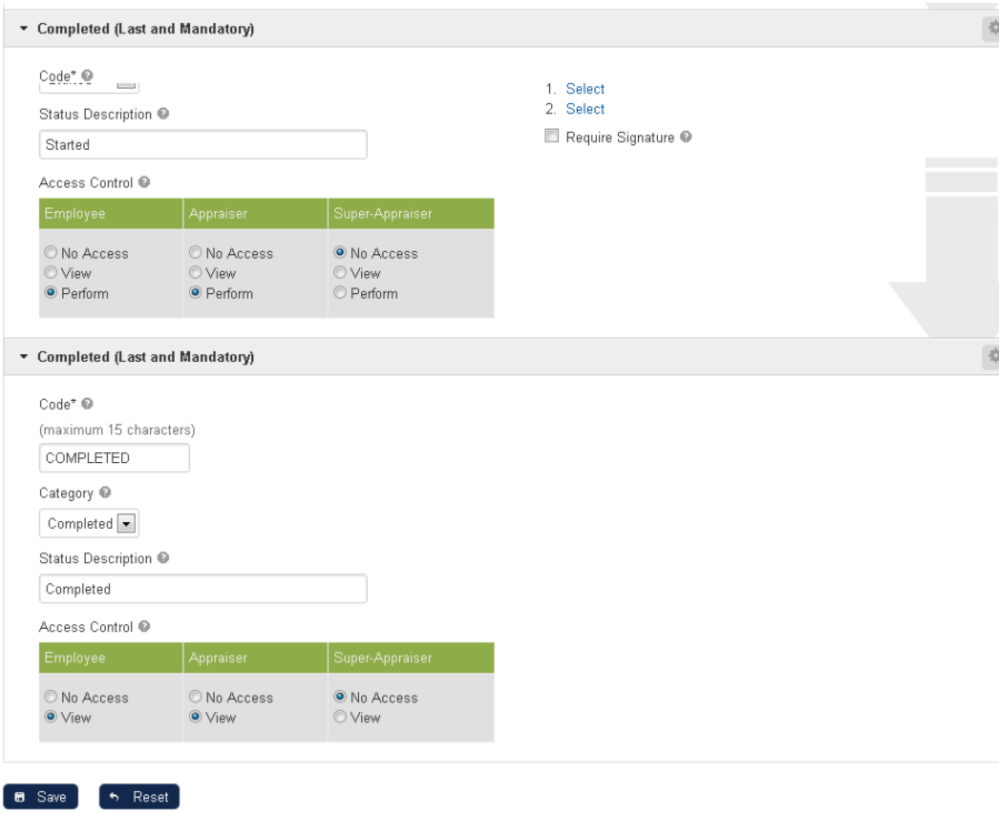
The Default Workflow

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

- **STARTED**, editable by Appraisee/Appraiser



- **COMPLETED**, viewable by Appraisee/Appraiser



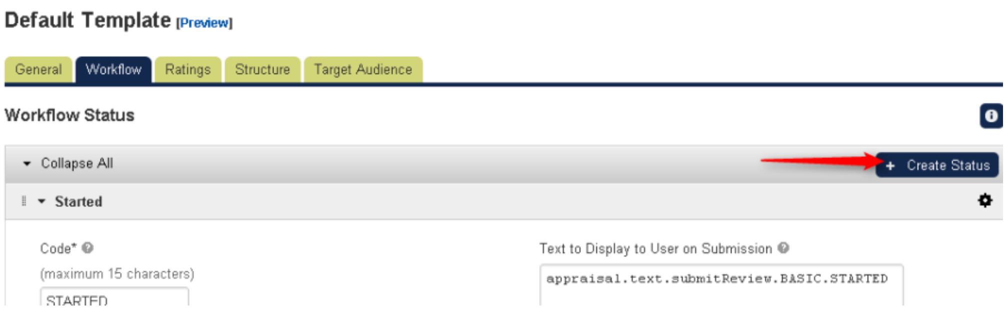
The two statuses can be modified and additional statuses can be added but the workflow must always maintain a minimum of two statuses. A new appraisal will always take on the first status in the workflow and each "submit" will move the appraisal on to the next status in the workflow. Submissions will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

Configurable Properties of an Appraisal Status

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

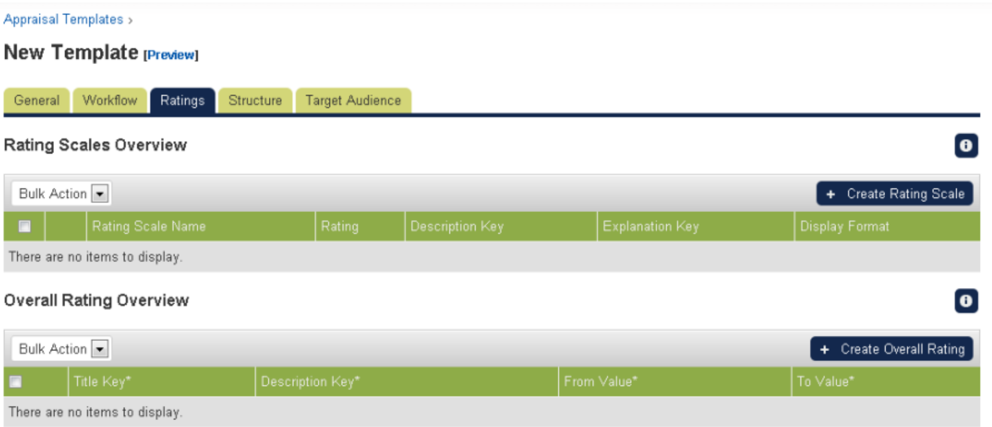
Click the **Save** button to keep the configuration settings.

Note: If the new template requires a new status, apart from default statuses, which are the **Started** and **Completed**, you can also create a new status by clicking the **Create Status**.



Configuring Rating Scale

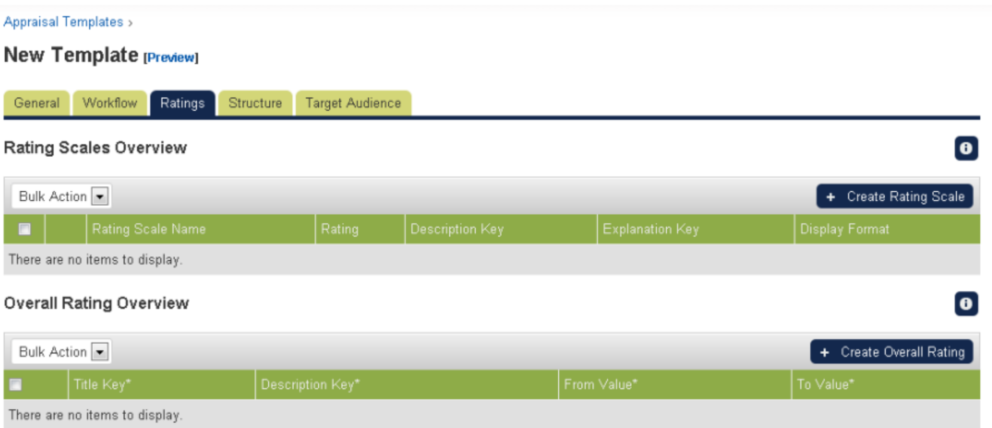
Involving a rating scale is optional in Past Achievements sections but mandatory in Past Competencies sections. The Ratings tab in the Appraisal Template Editor allows you to configure any number of rating scales for the appraisal and each scale can be used by any number of sections in the template.



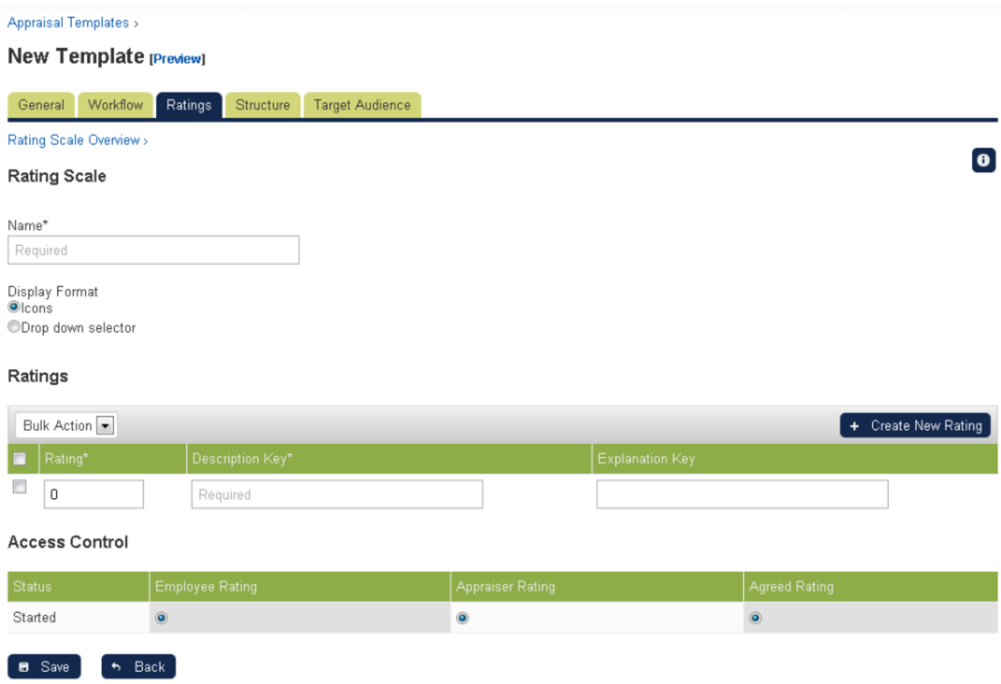
By default, you can create a rating scale for *Rating Scales Overview* and *Overall Rating Overview*.

Creating New Rating Scales

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



The Rating Scale editor appears on the screen.

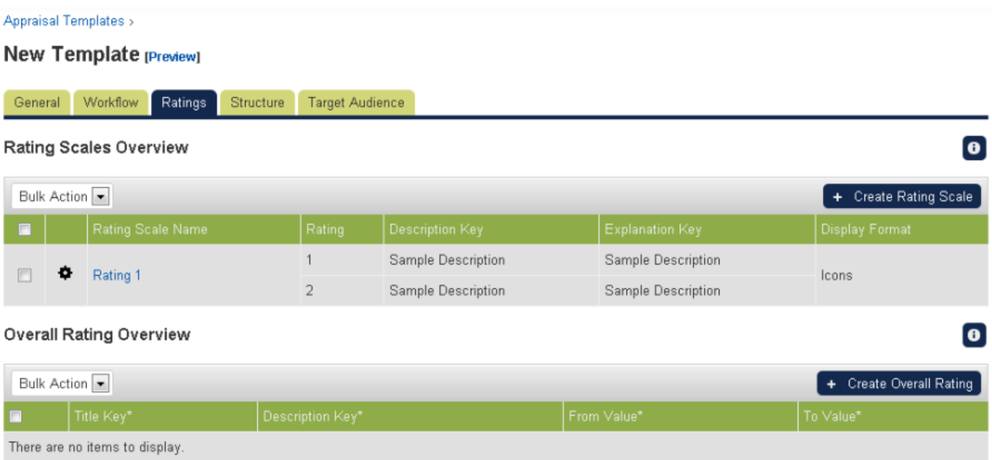


The Rating Scale editor requires you to enter the following parameters:

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

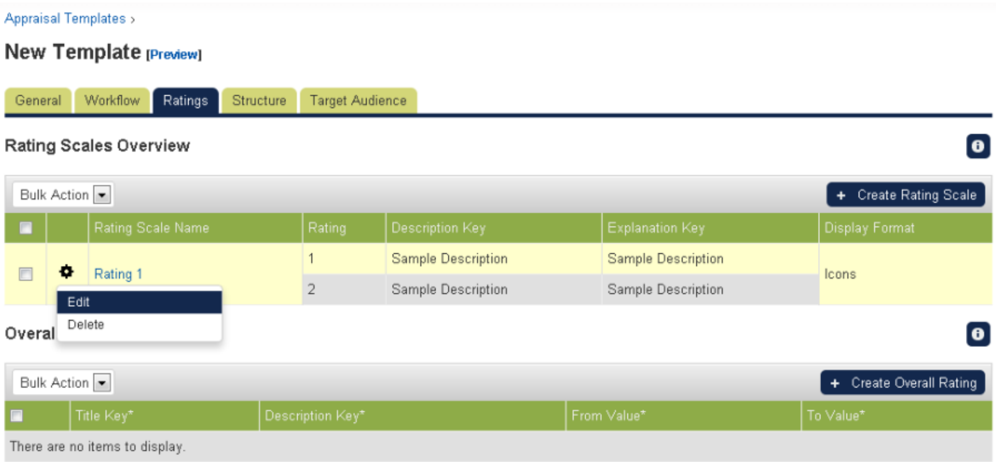
Note: To add a new rating, click the **Create New Rating**. A new row is added for the new rating.

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



Editing a Rating Scales

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



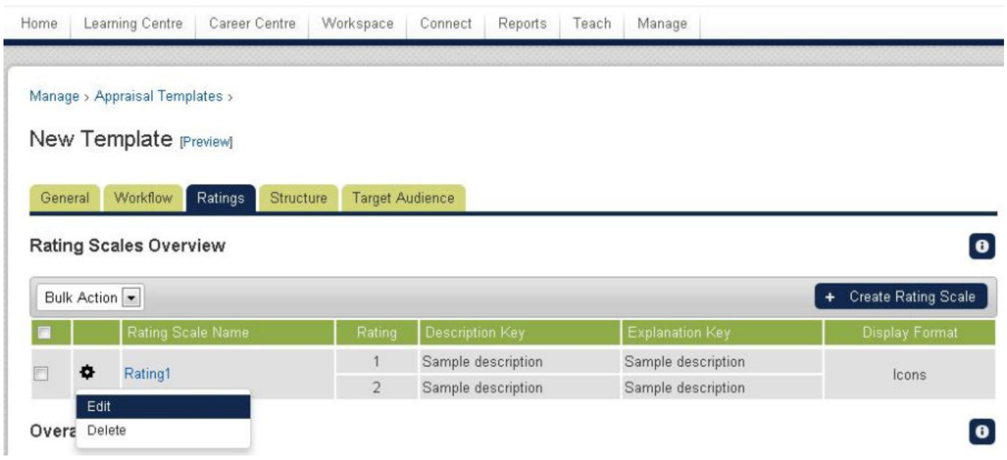
This leads you to *Rating Editor* screen. Start modifying the details and then click the **Save** button to keep the updates. To cancel the modification, click the **Back** button to return from the previous screen.

Removing a Rating Scales

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

To remove a single rating scale:

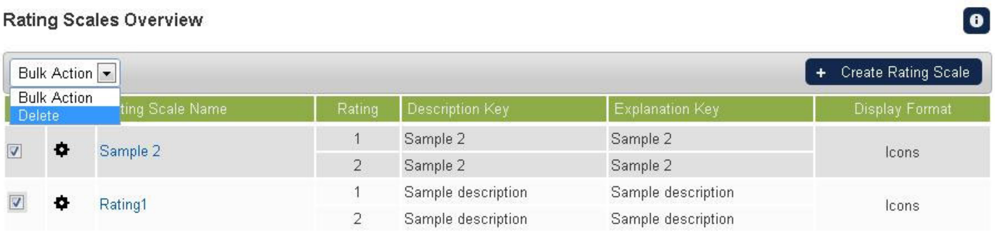
Click the **Gear** icon of the rating scale and then click **Edit**



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

To remove rating scale in Bulk:

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

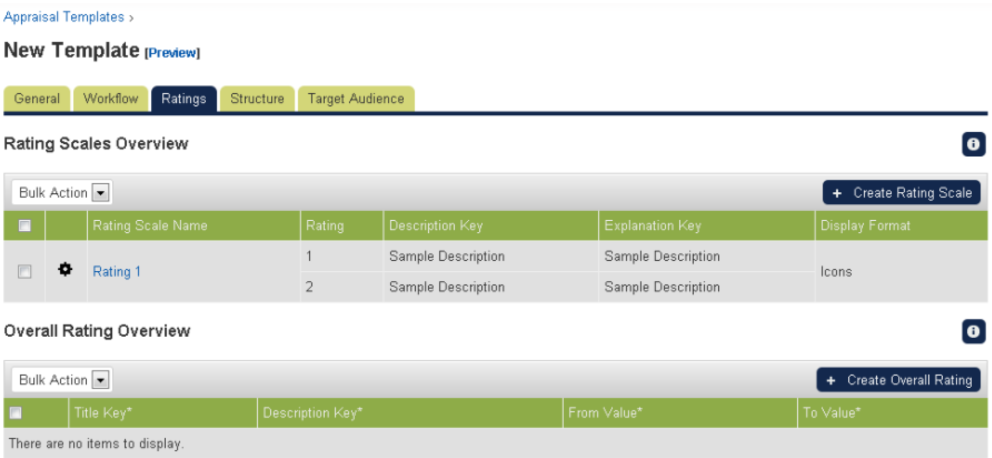


Creating Overall Rating

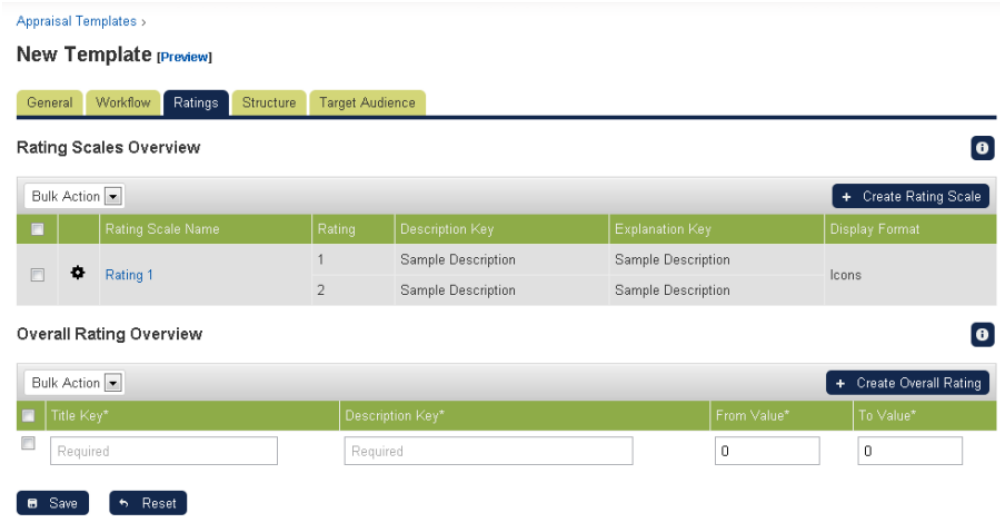
Sections that involve rating scales can be configured to display the average rating as a summary. The system will calculate the average rating for the specified set of ratings e.g. Appraiser Rating. The degree of precision will depend on the values entered in the template's Overall Rating, please see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

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

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



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



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

Editing an Overall Rating

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

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

Removing Overall Rating

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

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

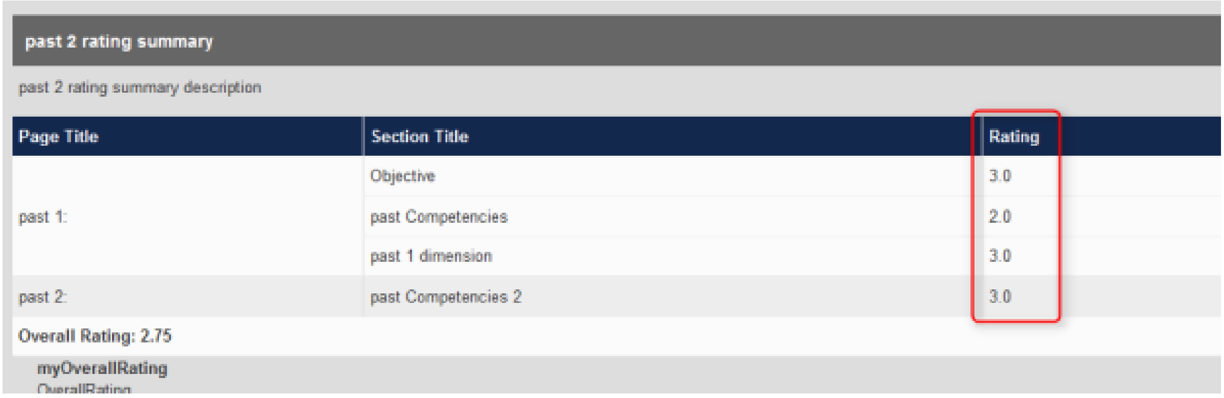
To remove rating scale in Bulk:
Tick all the rating scales or the scales you want to remove and then select the **Delete** action under the **Bulk Action** drop down button.

Calculation of Appraisal Overall Rating

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

```
SUM(section averages) / Number of sections
```

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



Section averages are shown alongside section titles

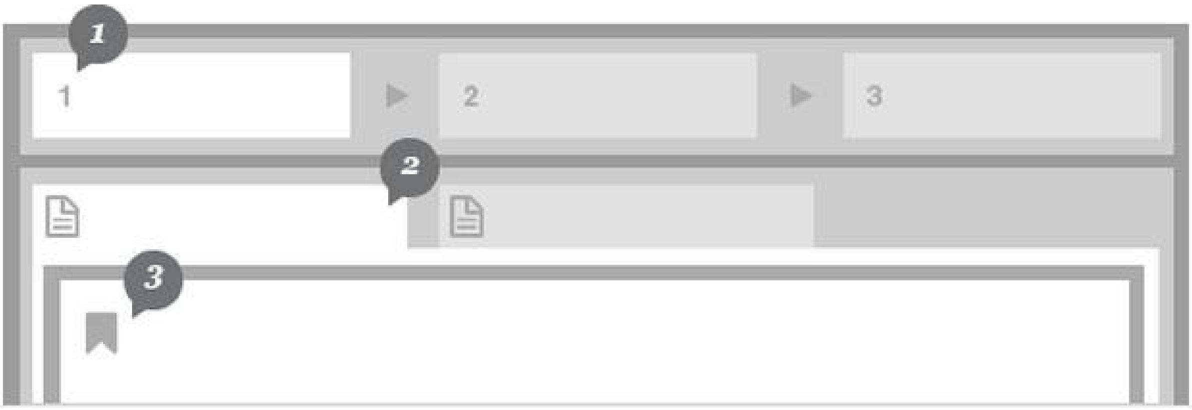
Configuring Appraisal Structure

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

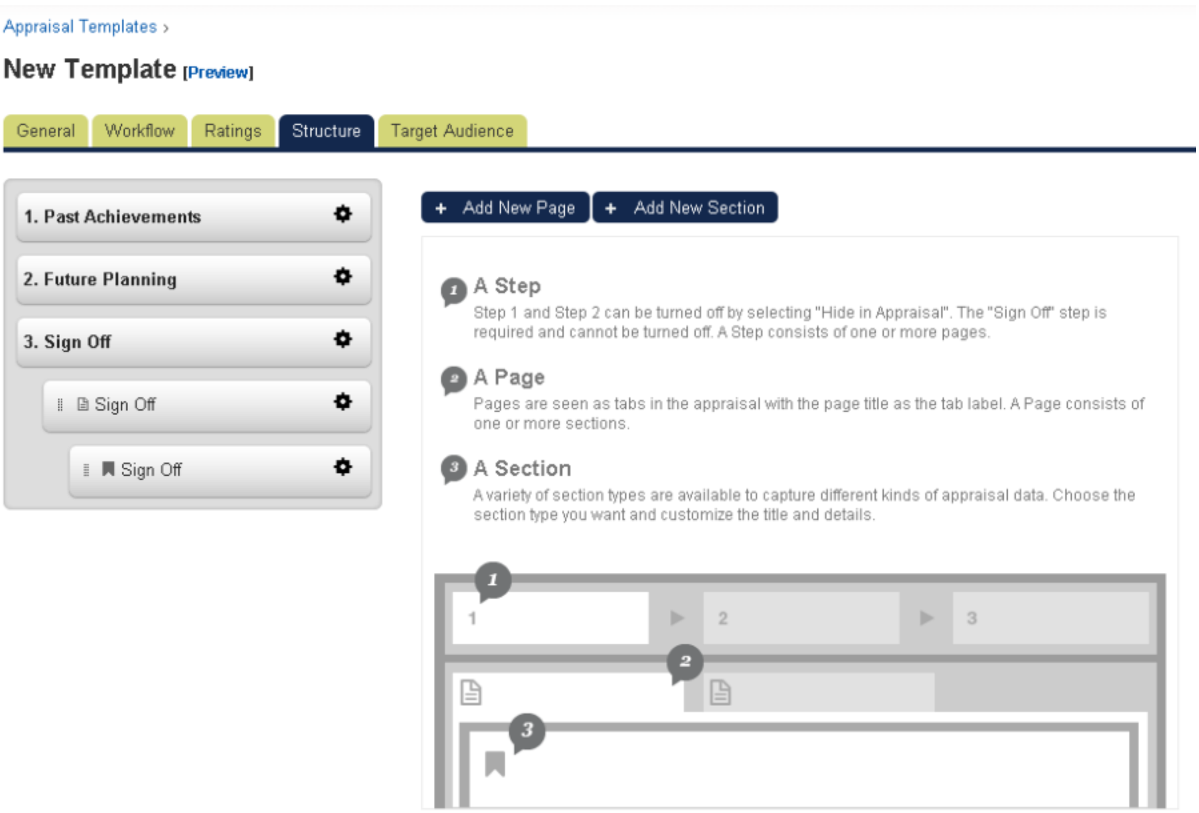
The appraisal template has the following structure:
1. Step
Step 1 and Step 2 can be turned off by selecting "Hide in Appraisal". The "Sign Off" step is required and cannot be turned off. A Step consists of one or more pages.

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

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



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



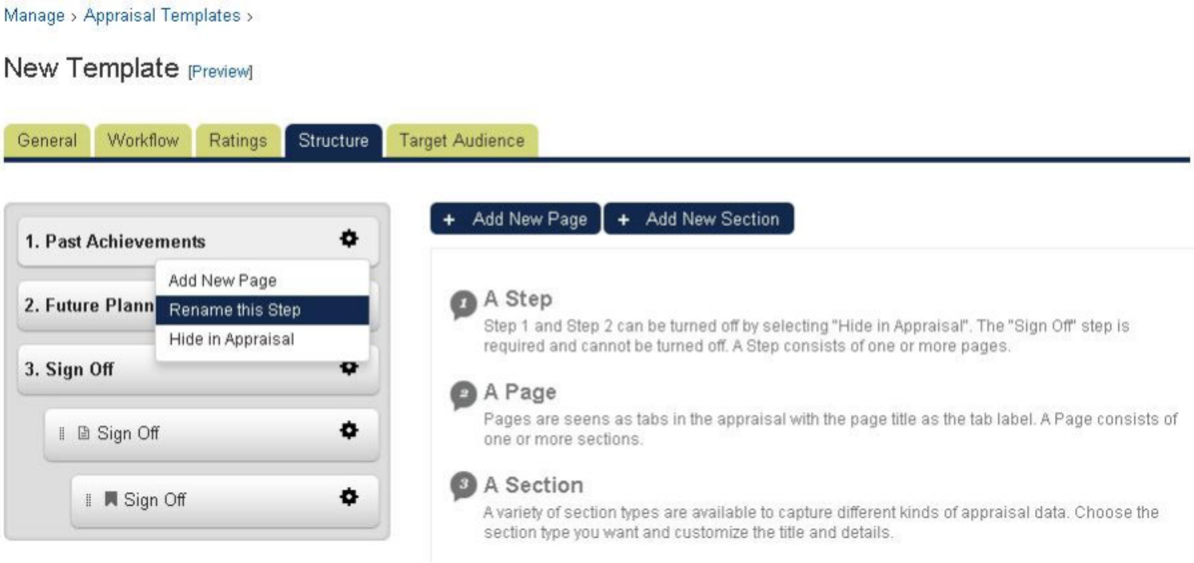
By default, the page displays the three steps in creating the appraisal templates, which are the following:

- Past Achievements
- Future Planning
- Sign Off

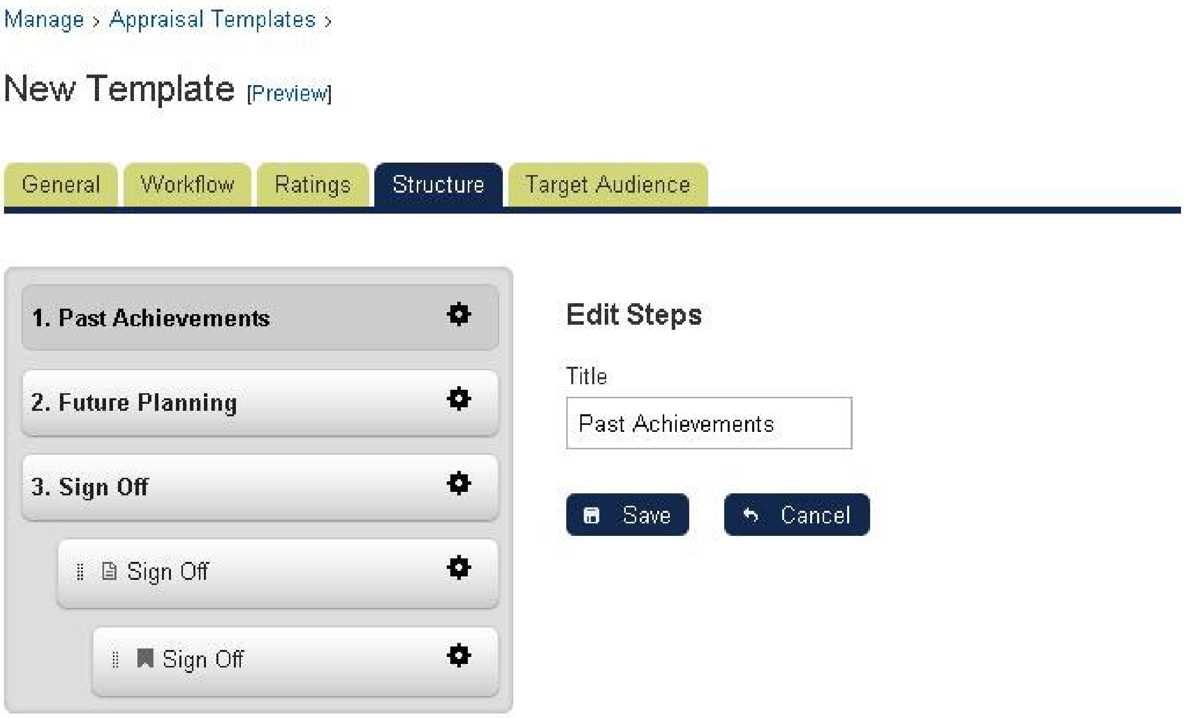
All steps has the functionalities to add add a new page, rename the step, and hide the step in the appraisal **EXCEPT** for the **Sign Off** step wherein it can ONLY add a new page.

Renaming the Step

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



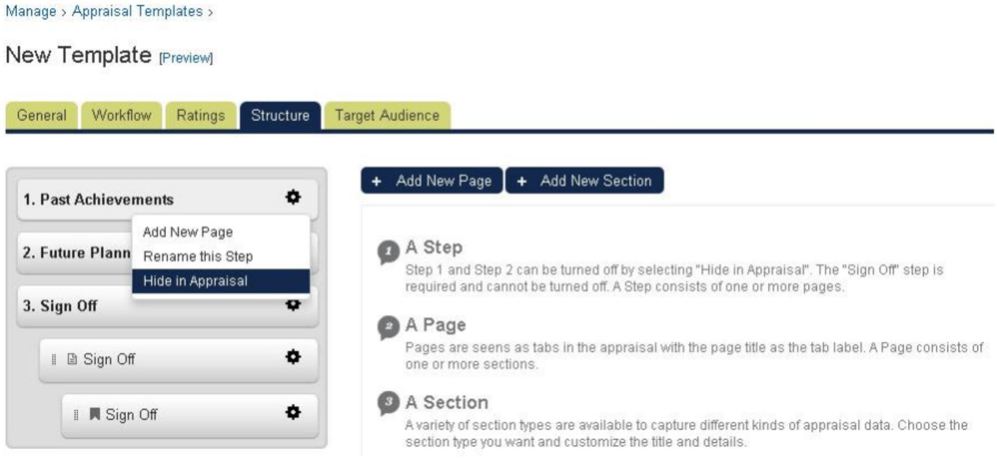
The screen refreshes and displays the *Edit Steps* screen. Rename the steps by modifying the name inside the **Title** field.



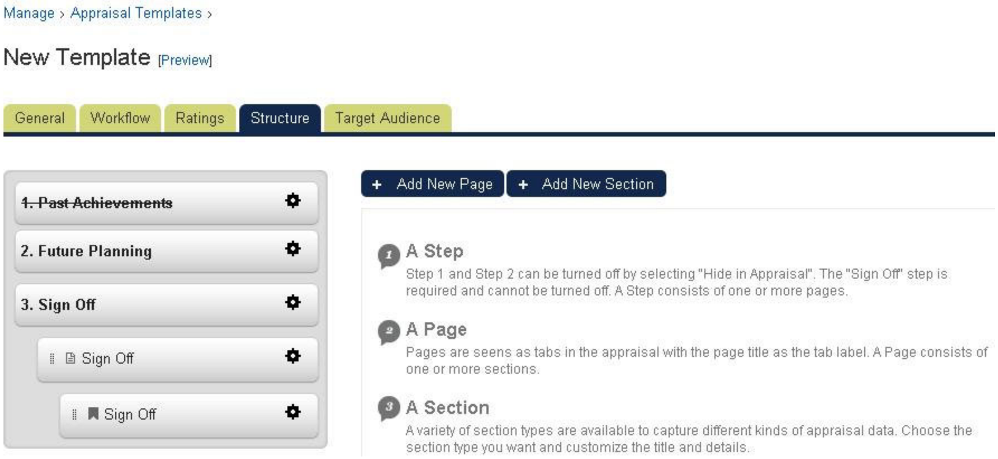
Click the **Save** button to keep the changes or click the **Cancel** button to ignore the changes.

Hiding the Step in Appraisal

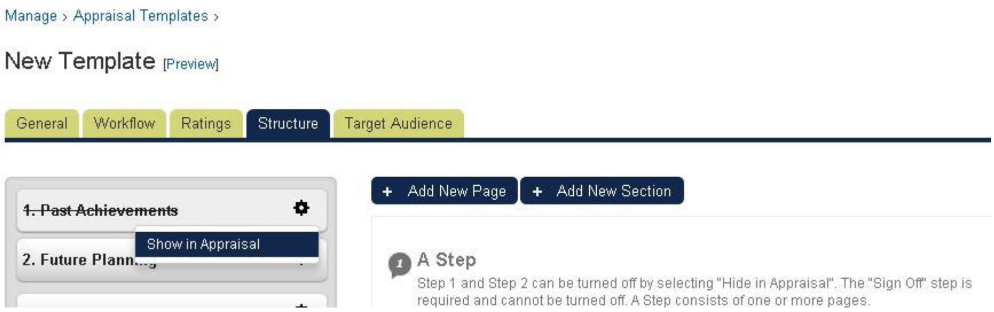
To hide the step in appraisal, under the **Structure** tab, click the **Tools** icon of the the step you want to hide and then select **Hide in Appraisal**.



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



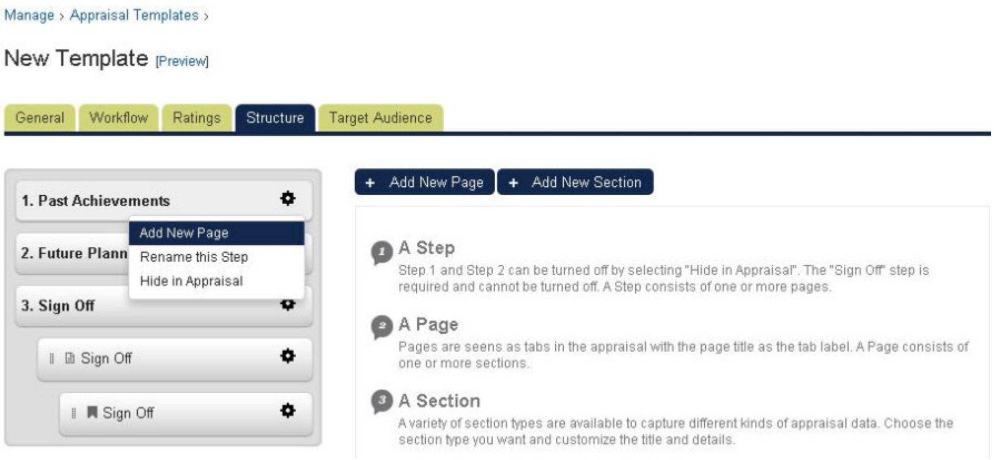
To show again the step in appraisal, click the **Tools** icon and select the **Show in Appraisal**.



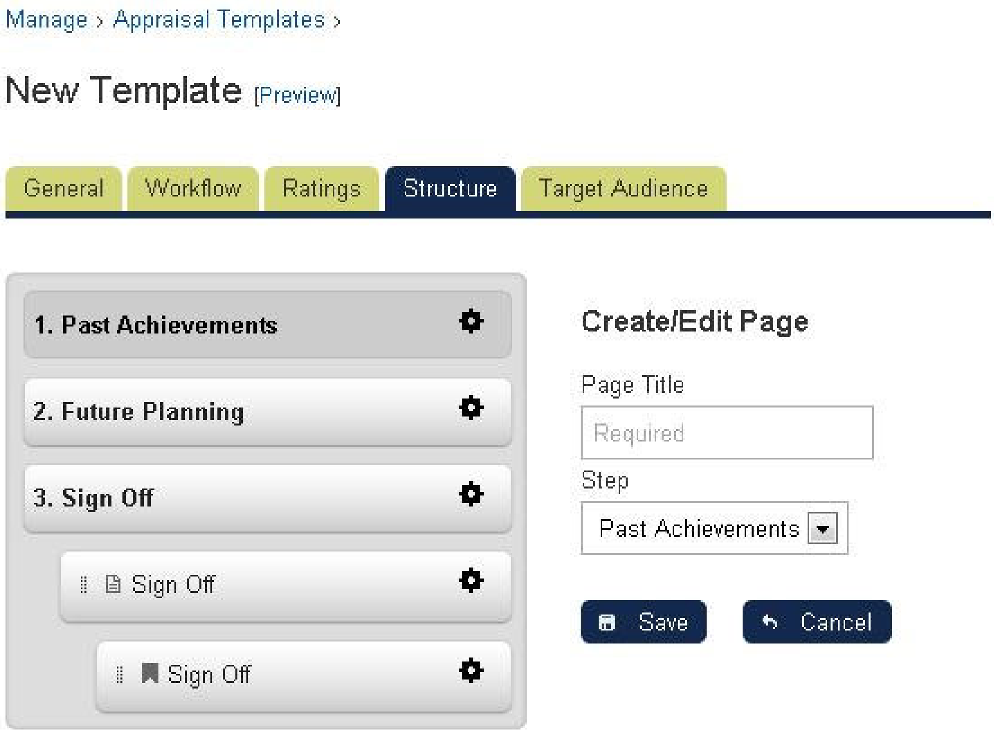
Adding a New Page

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

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



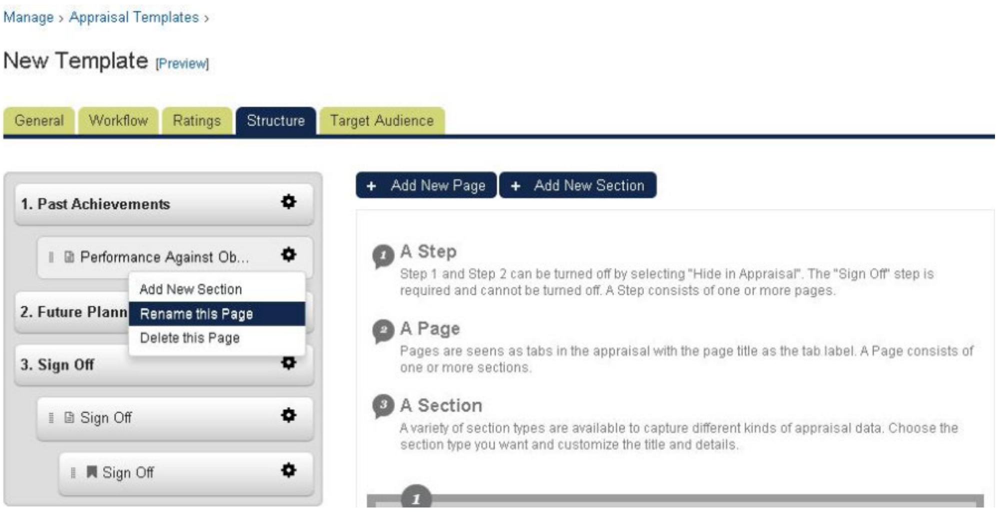
The screen refreshes and displays the *Create/ Edit Page*. Enter the Page Title in the **Page Title** field. Under the Step, you can change or select the step where you want to add the page.



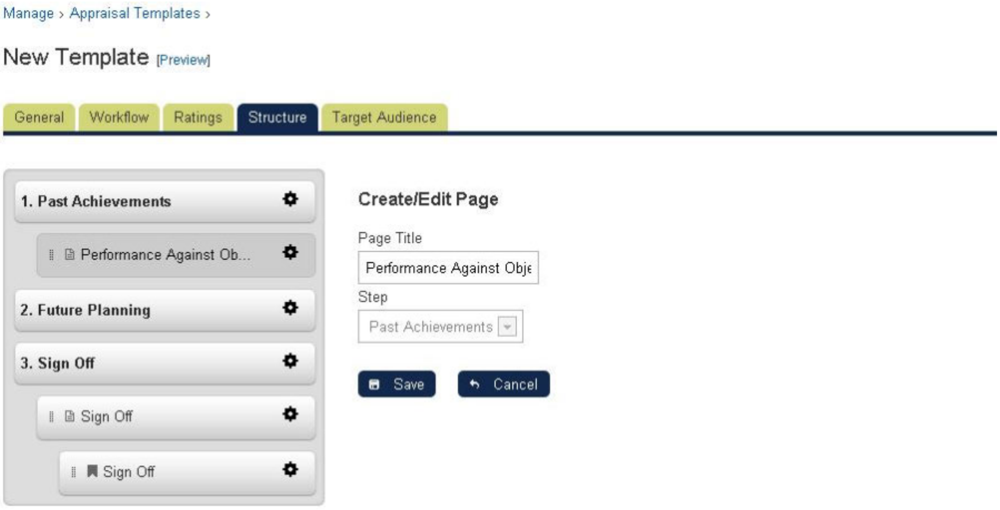
Click the **Save** button to save the entered data.

Renaming a Page

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



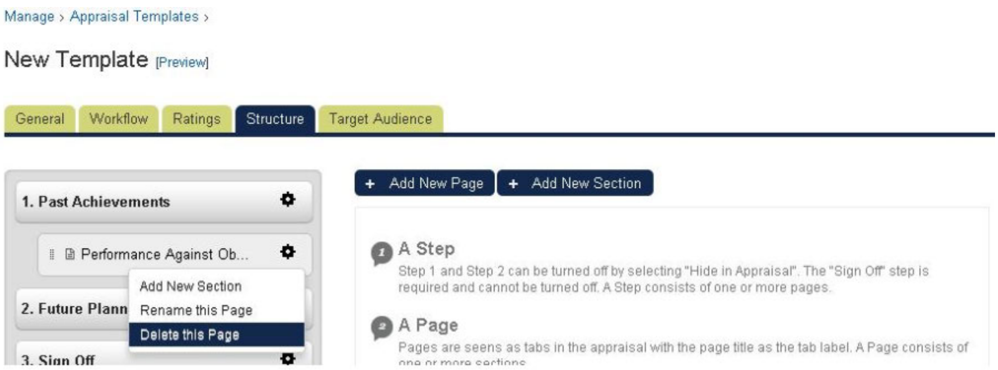
The screen refreshes and displays the *Create/ Edit Page* screen. Start renaming the page title.



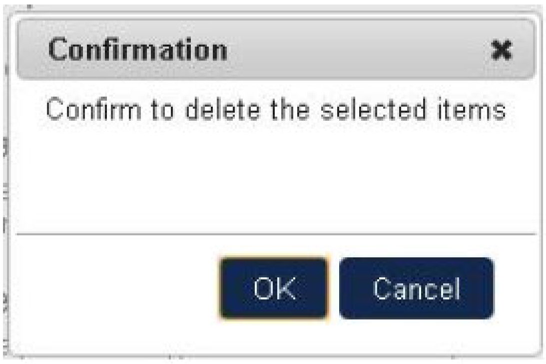
Click the **Save** button to keep the changes.

Removing a Page

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

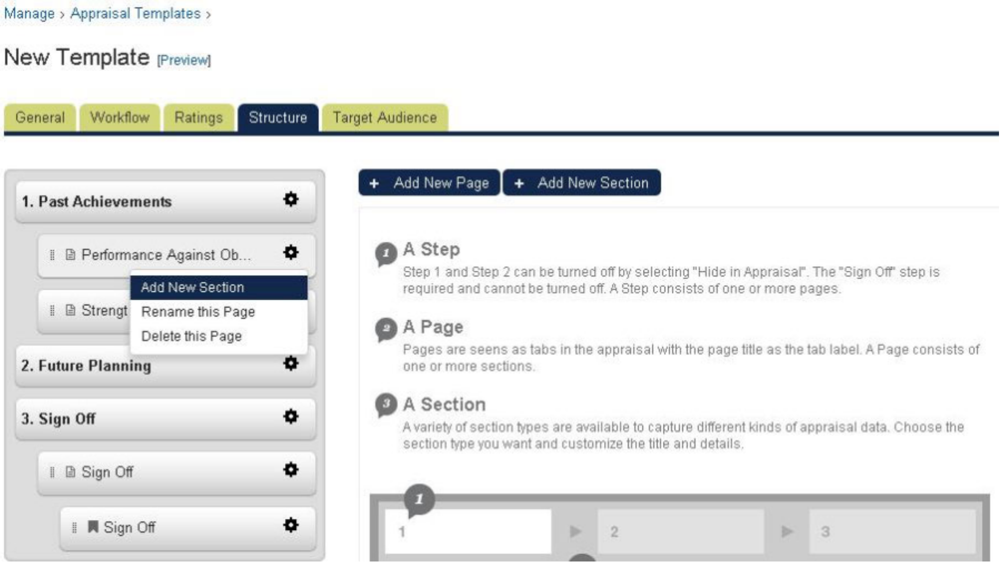


A confirmation box displays on the screen. Click **OK** to remove the **page**, otherwise click **Cancel** to cancel the deletion of the page.



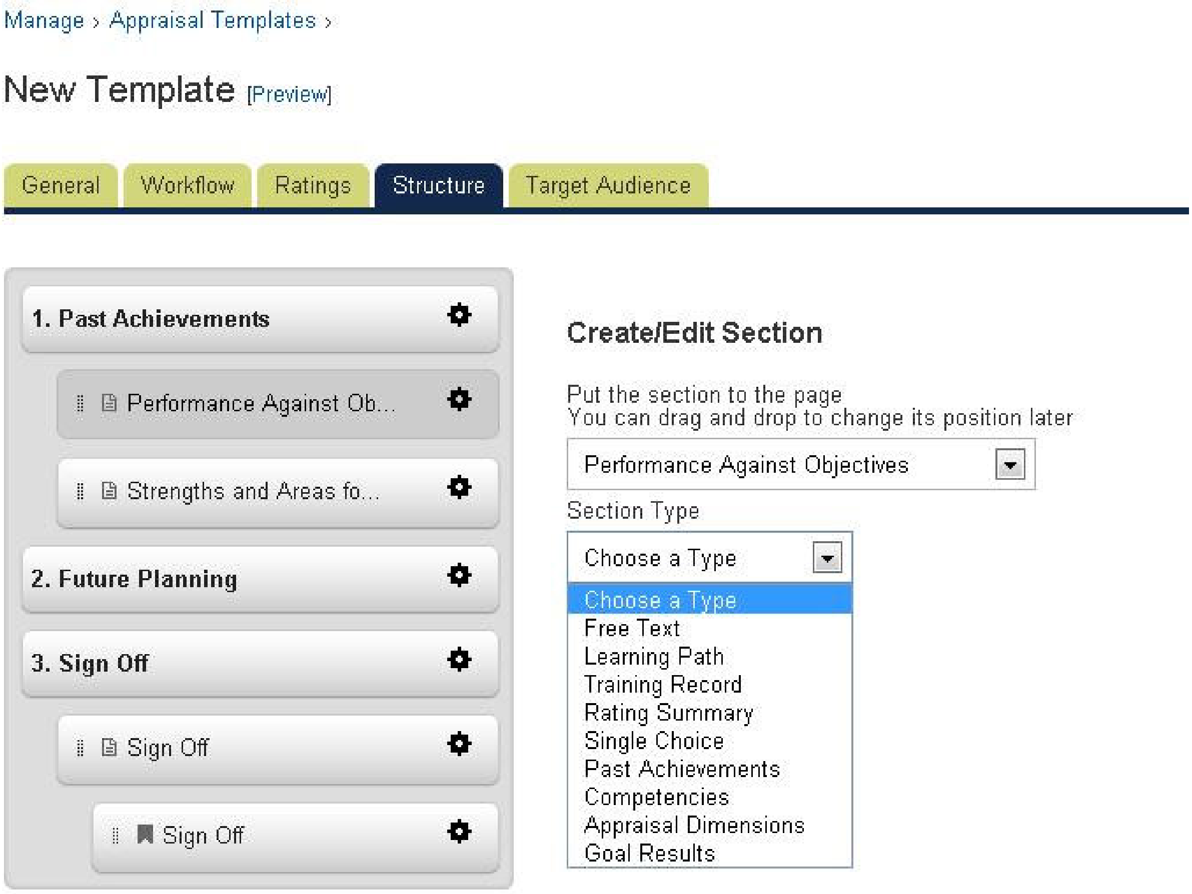
Adding a New Section to a Page

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



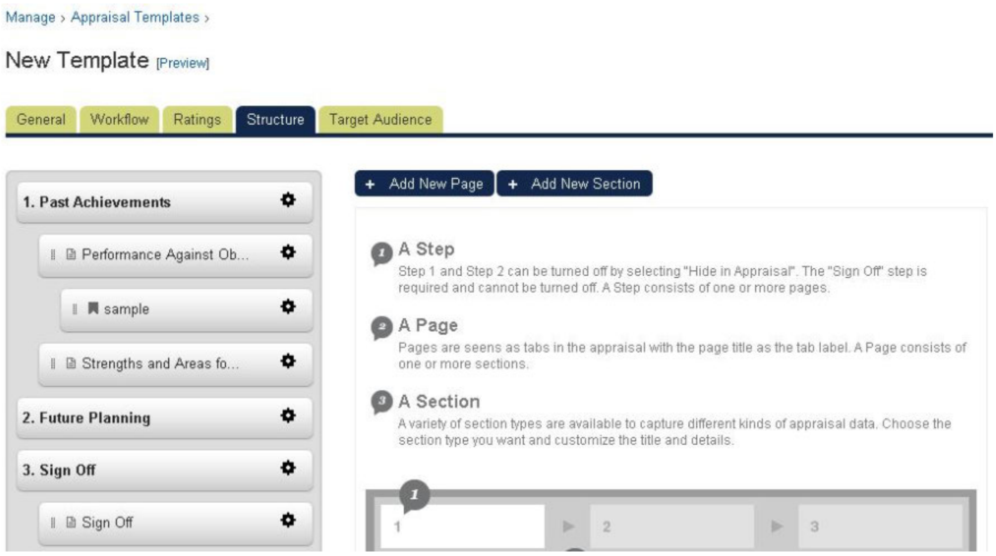
The screen refreshes and displays the *Create/Edit Section* screen. You can select or change the page where the section will be added

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



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

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

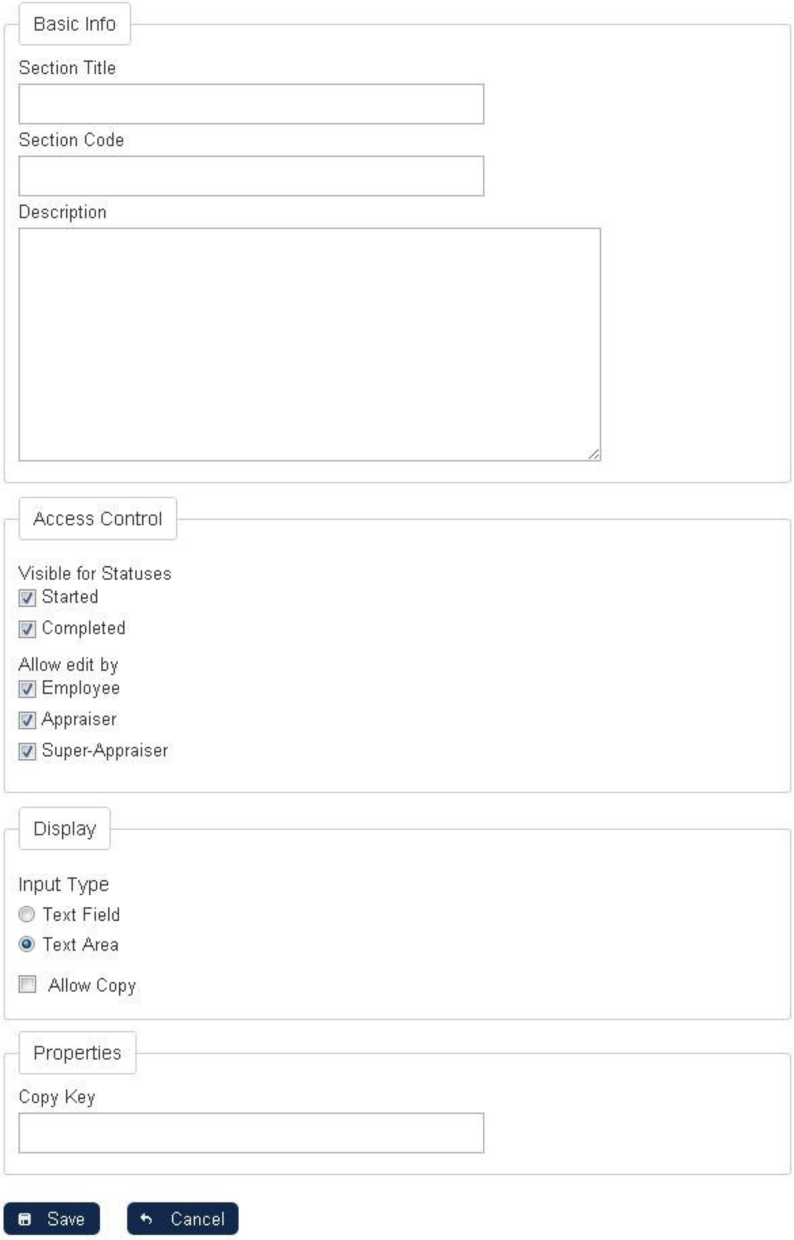


Section Types

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

Free Text

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



To configure a free text section, a user needs to provide the following parameters:

1.Section Title

2. Section Code

3. Description

4. Visible for status

Each section can be configured to be visible to the user only when the appraisal is in a certain state.

5. Allow edit by

This property allows you to specify who is able to edit the section:

- None implies the section is read only and nobody is able to edit
- Appraisee implies the section is read only for the Appraiser
- Appraiser implies the section is read only for the Appraisee

Both implies the section is editable for both the Appraisee and Appraise

6. Copy Key and Allow Copy

Appraisals typically involve objectives and other information which are carried forward from previous sections or even previous appraisals. In the Appraisal Template Editor, there is a configuration called Copy Key which can help to automate this process for users. The administrator can enter a value (up to 15 characters) in this field and link to another section of the same type by ensuring the same value is entered as the copy key for both sections. The source of the copied data will depend on which part of the appraisal the user is completing - please refer to the below example.

Assume a simple template with a Free Text section in the Past Achievements part and a Free Text section in the Future Planning part, both with the same value as Copy Key.

- User starts a new appraisal
- User enters "Some free text in past achievements" in the Past Achievements Free Text section
- User enters "Some free text in future planning" in the Future Planning Free Text section
- User completes the appraisal
- User starts a new appraisal
- User will see "Some free text in future planning" in the Past Achievements Free Text section for the new appraisal, copied over from the previously completed appraisal

In the above example, the data is copied over from the previous appraisal on starting a new appraisal. However, it may be necessary in some cases for a user to copy data from a section in Past Achievements to a section in Future Planning, all in the same appraisal. To accomplish this, in addition to the Copy Key configuration, the Allow Copy checkbox should be enabled for the section the user should copy to.

The flow would then be similar to:

- User starts a new appraisal
- User enters "Some free text in past achievements" in the Past Achievements Free Text section
- User navigates to Free Text section in Future Planning which is empty
- User clicks Copy from Past Achievements button and "Some free text in past achievements" is copied into the text area
- The same concept applies to competencies and objectives

7. Input Type

Allows you to select input type. Currently, there are two input types are available, namely:

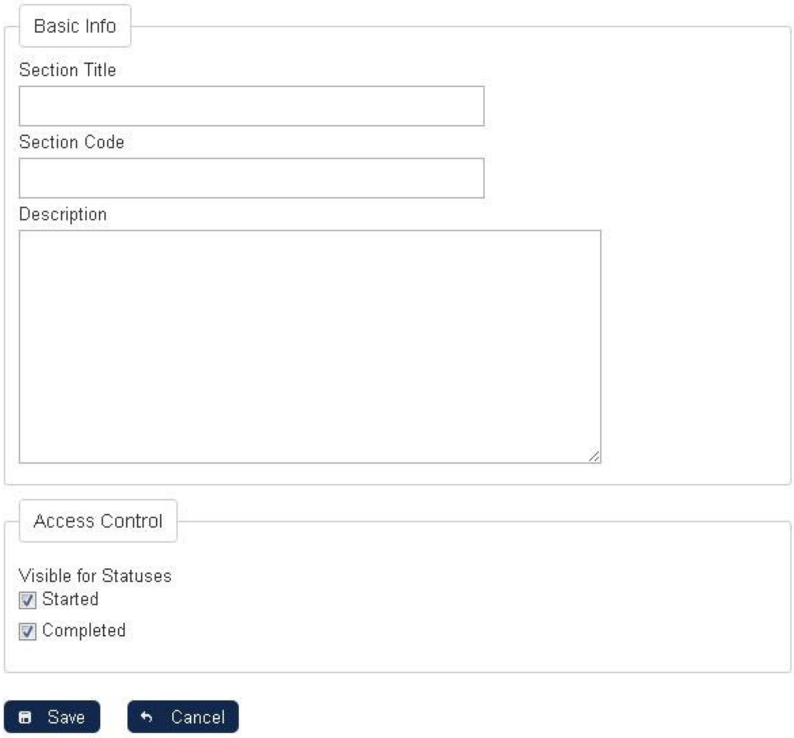
- Text Area. Use this if you expected to enter sentences.
- Text Field. Use this if you expected to enter short sentence.

Learning Path

A Learning Path section simply displays the current learning path of the appraise. To configure a learning section, a user needs to provide the following parameters:

- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)



Training Record

The Training Record section is a read-only section that displays the appraisee's transcript records for the appraisal period. The appraisal period is the start of the previous appraisal to the start of the current appraisal and any training that was enrolled upon or completed during this period is included.

To configure a training record section, a user needs to provide the following parameters:

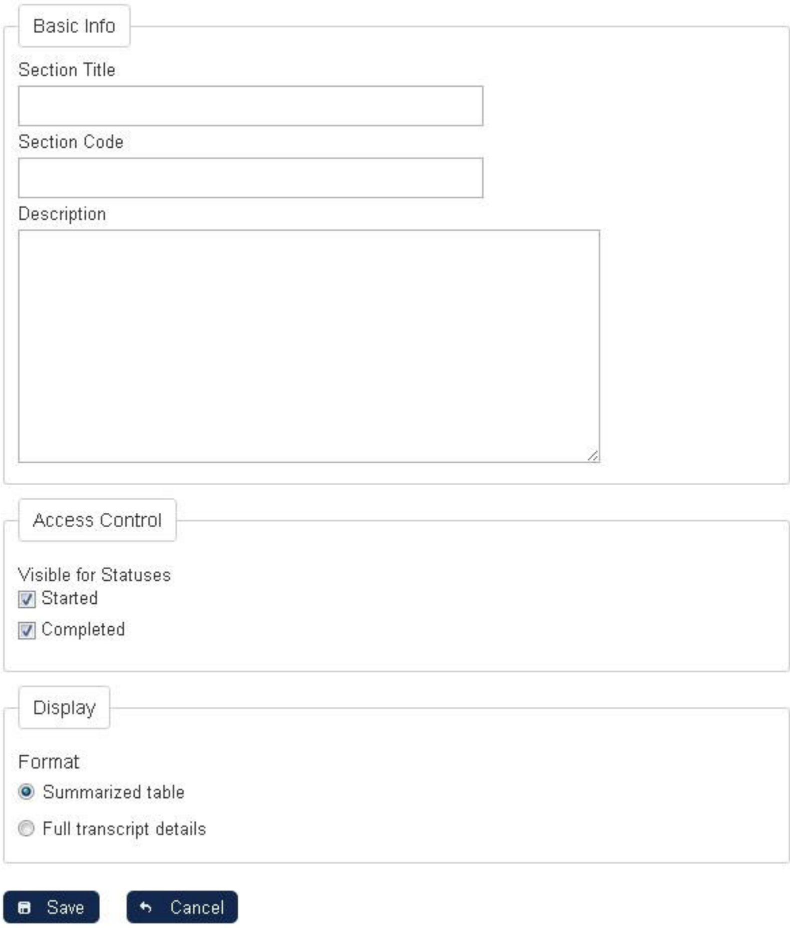
- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Display***

This gives you an option on how the training records will be display. Currently there are two (2) options to select:

- Summarized table
- Full transcript details



Rating Summary

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

To configure the rating summary section, a user needs to provide the following parameters:

- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Summary type***

Allows you to select from the following options:

- **Average**

With all appraisal sections configured to show Rating Summary, the overall rating summary will be calculated by summing up all the points scored in those sections and then divided by the number of items (e.g. number of objectives).

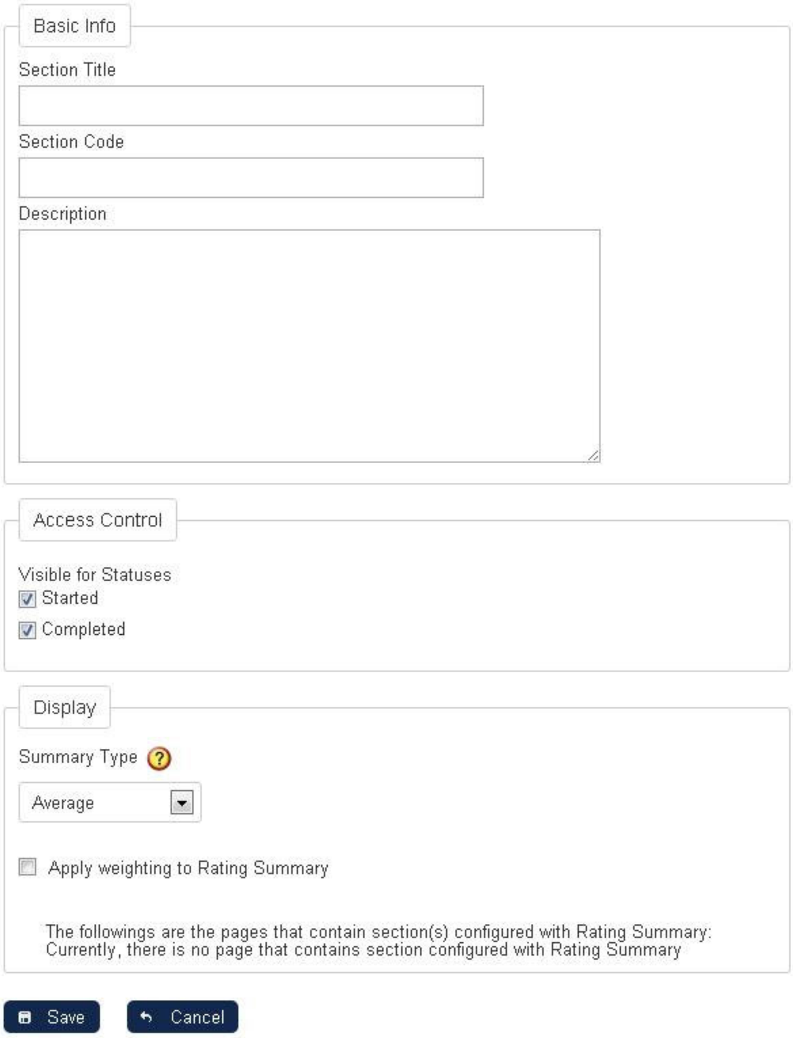
- **Total Percentage**

With all appraisal sections configured to show Rating Summary, the overall rating summary will be calculated by summing up all the point scored in those sections. A total percentage will also be calculated by dividing the total score by the maximum points that the user can be scored with the configured rating scales.

- ***Apply weighting to Rating Summary***

In some cases, different appraisal sections may have different importance. This can be set up by setting weight on each appraisal section.

Note: Sections that are applicable for setting weight will show up for configuration after saving the section the first time.



Single Choice

This section allows the user to create statements to be selected by the appraisee or appraiser. To configure the single choice section, you are required to enter the following parameters:

- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

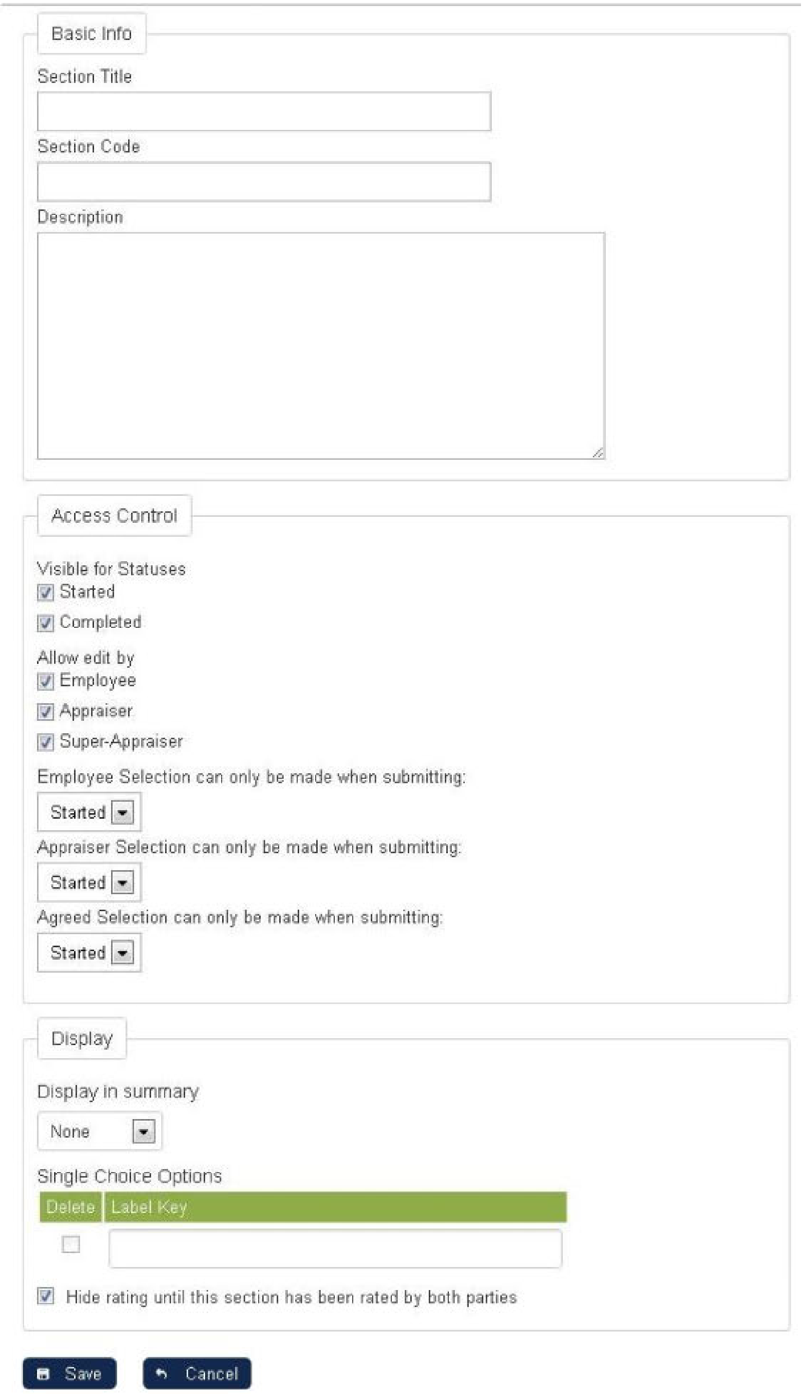
(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)

- ***Display in Summary***
- ***Single Choice Options***

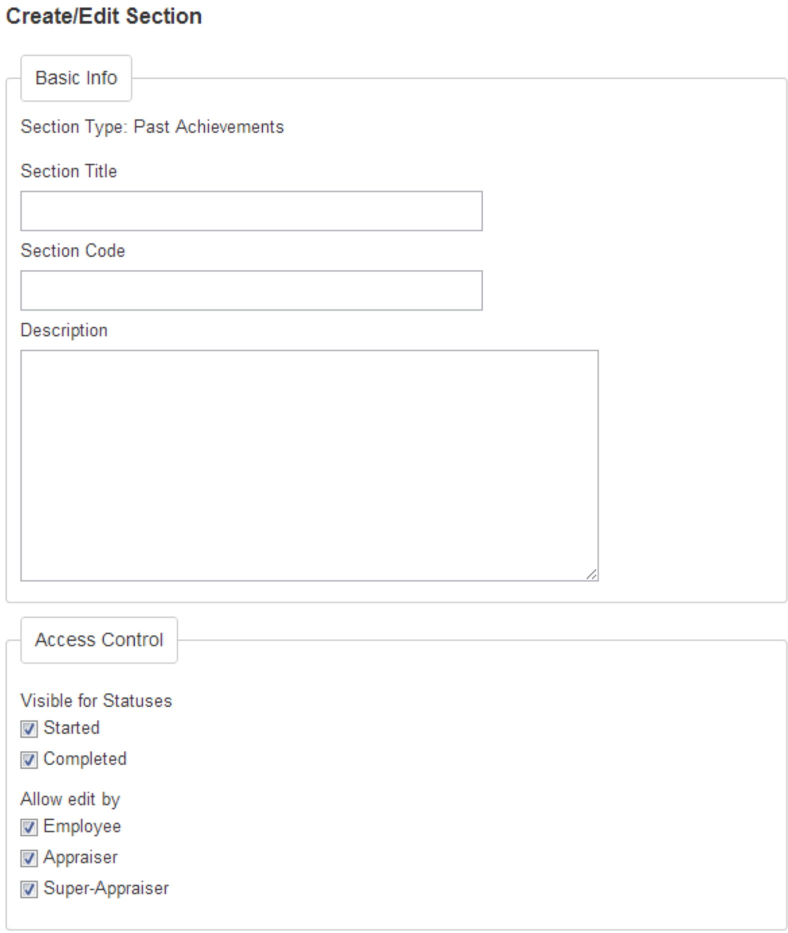
For every single choice section, you can configure a set of single choice options that will be specific to that section. To add options to the section, enter the option text (or bundle key) into the text field and click Save. Once the option has been added, a new text field will appear for you to add subsequent options. There is no limit to the number of options you can have.



Past Achievements

This section allows the appraiser and appraisee to evaluate the appraisee's objectives, achievements, and employee's performance. It shows if the appraisee has fully, partially or never met his/her objectives.

To configure the single choice section, you are required to enter the following parameters:

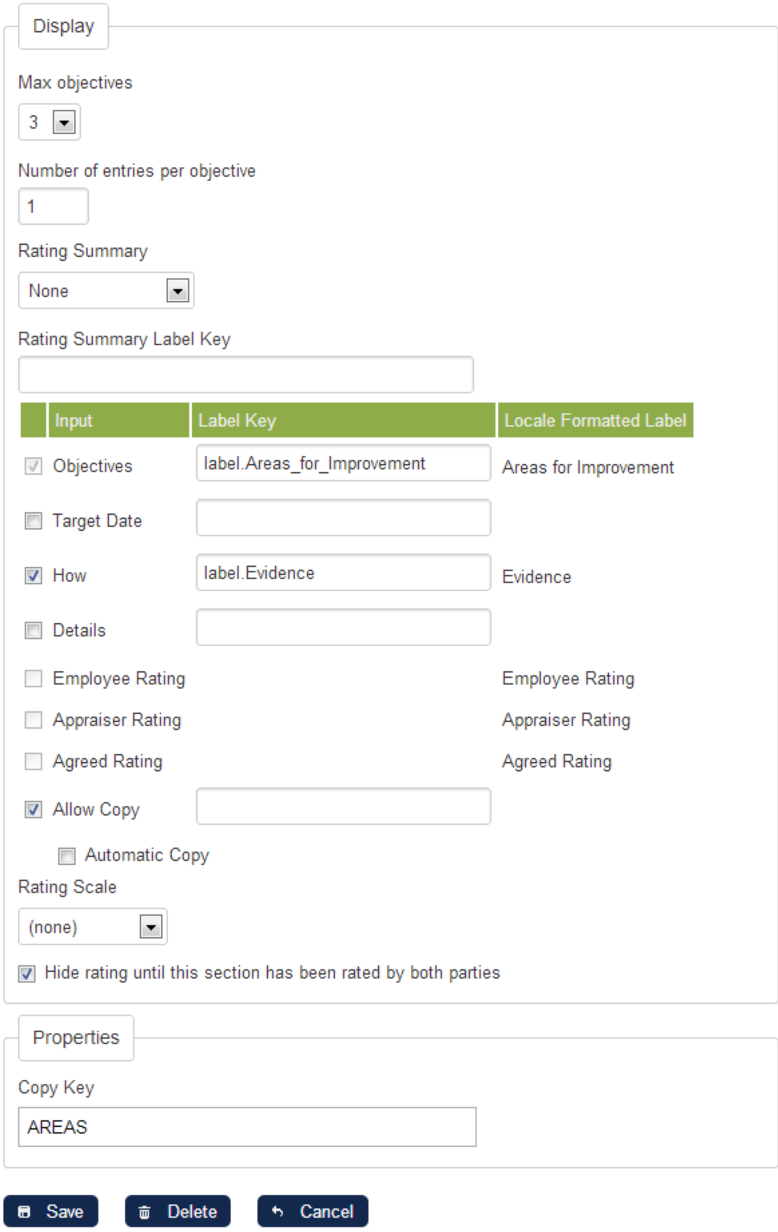


- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)



- ***Maximum Objectives***

Enter the maximum number of objectives to be entered in the past achievements section.

- ***Number of entries per objective***

Set the number of entries per objectives.

- ***Rating Summary & Rating Summary Label Key***

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

- ***Columns***

Columns that can be incorporate on the past achievements section:

Objectives	Text Area
Target Date	Date Selector

How	Text Area
Details	Text Area
Measure	Text Area
Employee Rating	Rating Scale
Appraiser Rating	Rating Scale
Agreed Rating	Rating Scale
Allow Copy	Check Box

Note: For the **Allow Copy** check box, even this option is ticked, this will not be shown in the past achievement page if there is no corresponding future objectives section.

- ***Copy Key***

(See the description on the Free Text section)

- ***Rating Scale***

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

<u>*Option to use the individual competency proficiency scale instead of appraisal ratings*</u>

This option allows the users to rate each competency using the proficiency level scale specified in the competency instead of the appraisal rating scale. When this option is selected, the rating results will not be included in the rating summary calculation. Choosing this option will result in user's competency level being updated after the appraisal is signed off. Depending on the configuration, the final competency level assigned to the user will be in the order of agreed rating, or appraiser rating, or appraisee rating, whichever is first available. Since the appraisal rating scale is no longer used with this option, administrators are required to configure extra rating editing rules for this section (these rules are usually defined together with the appraisal rating scale).

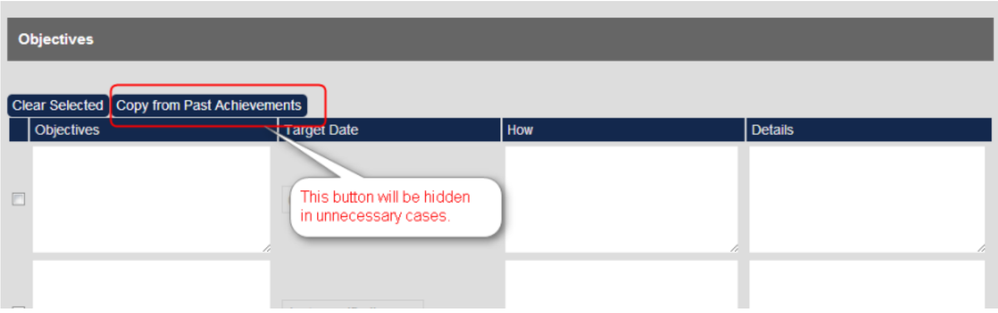
- ***Hide rating until this section has been rated by both parties***

This gives you an option to hide the rating provided by raters until this section has been rated by both parties.

"Copy from Past Achievements" button

a. If Past Achievement has items selected,
1. "Copy from Past Achievements" will show in Future Objectives
2. Clicking on it will copy the data over

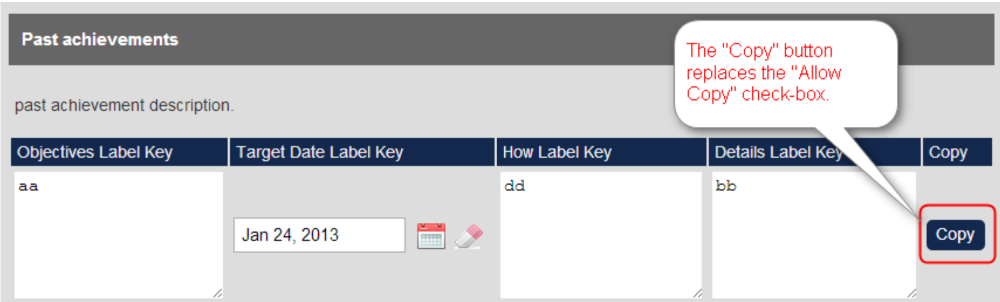
b. If Past Achievements is not available or is configured with a different COPY KEY
1. "Copy from Past Achievements" will be hidden

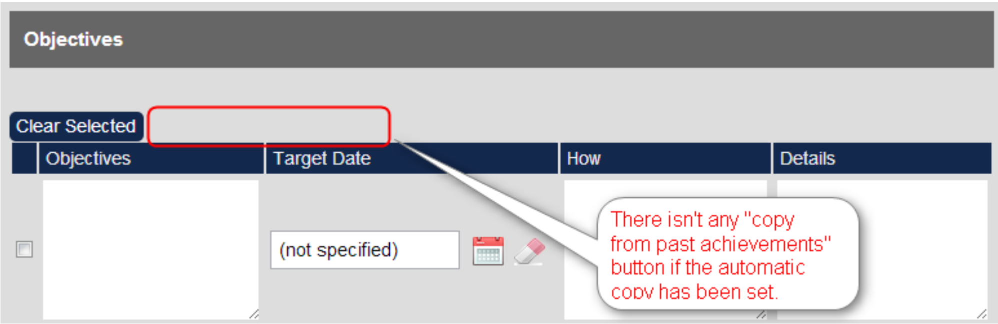


Automatic Copy Option In Past Achievements Section

A new "Automatic Copy" option has been introduced in the Past Achievements section. It can only be chosen when "Allow Copy" is set. When this "Automatic Copy" option is chosen, a button will replace the "Allow Copy" (Carry Over) check-box.

When this button is pressed for a particular objective in the Past Achievements section, the objective data is automatically copied to Future Objectives section. This removes the need for a 'Copy from Past Achievements' button, which thus will not be displayed in the Future Objectives section when the "Automatic Copy" option is chosen. Once this button has been activated for a particular objective in the Past Achievements section, it cannot be activated again.





Transferring Objective Data from Previous Appraisals

Objectives are always appraised within the Past Achievements section of an appraisal. Where these objectives have been set in a previous appraisal and this data needs to be brought forward, the system previously assumed that it would be held in the Future Objectives section of the previous appraisal. However, while this approach is appropriate when only annual appraisals are in use, it did not take account of mid-year appraisals, which commonly do not contain a Future Objectives section.
This behavior has now been changed. The system will now try to find objectives in Past Achievements when the previous appraisals do not contain a Future Objectives section. Following is an example.
Here is the full appraisal timetable for an organization which operates three monthly midyear appraisals alongside annual appraisals:

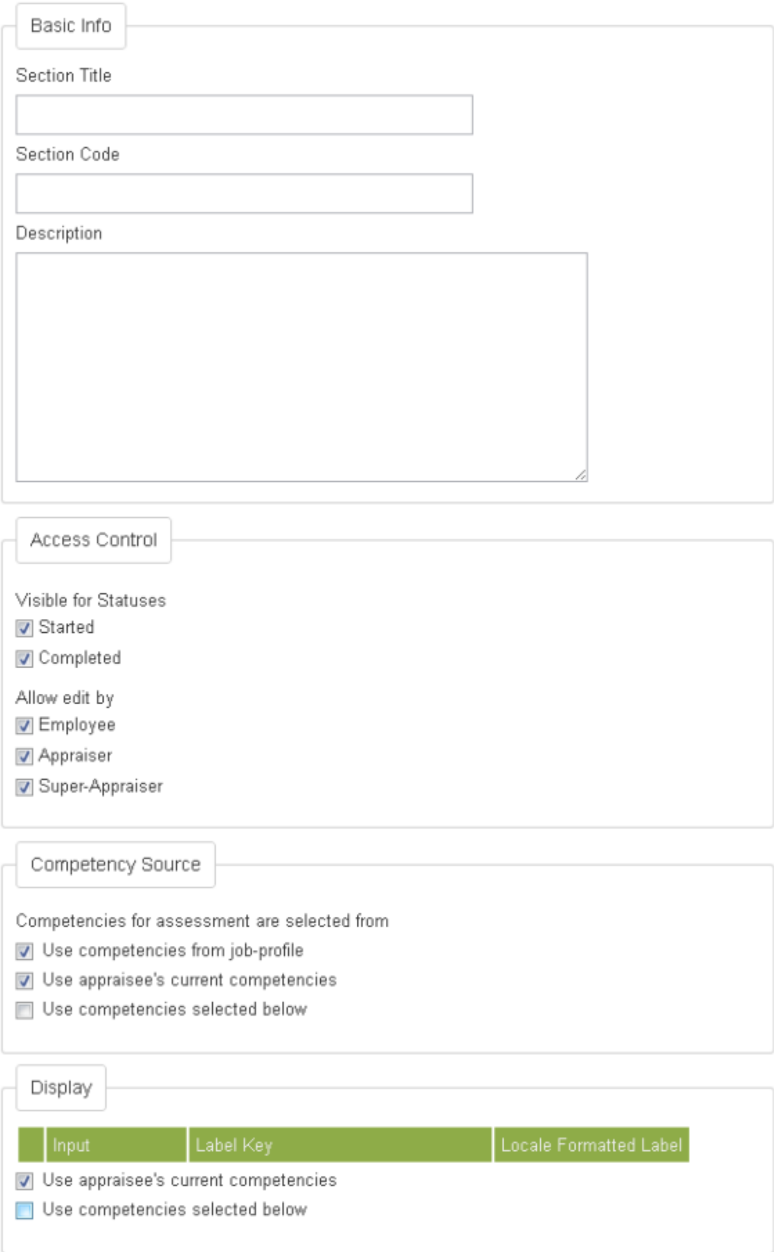
Appraisal No. (For Reference Only)	Type	Period Start	Period End	Objectives are brought forward from
1	Annual	1st Jan 2011	31st Dec 2011	
2	Mid -Year	1st Jan 2012	31st Mar 2012	Future Objectives of 1
3	Mid -Year	1st Apr 2012	30th Jun 2012	Past Achievements of 2
4	Mid -Year	1st Jul 2012	30th Sep 2012	Past Achievements of 3
5	Annual	1st Jan 2012	31st Dec 2012	Past Achievements of 4
6	Mid -Year	1st Jan 2013	31st Mar 2013	Future Objectives of 5

When the previous appraisal has no Future Objectives section, the system will instead bring objective data forward from the Past Achievements section of this previous appraisal.

Competencies

The Competencies section type list the competencies associated with the job profile (or profiles) assigned to the appraisee so that they can be rated against. In the below example, the check boxes under 'Development Needs' allow the appraisee to mark competencies which she/he may need to work on. The competencies with the checkbox enabled can later be copied to a Future Objectives section if suitably configured.

The Future Objectives section can be set up using the following configuration:



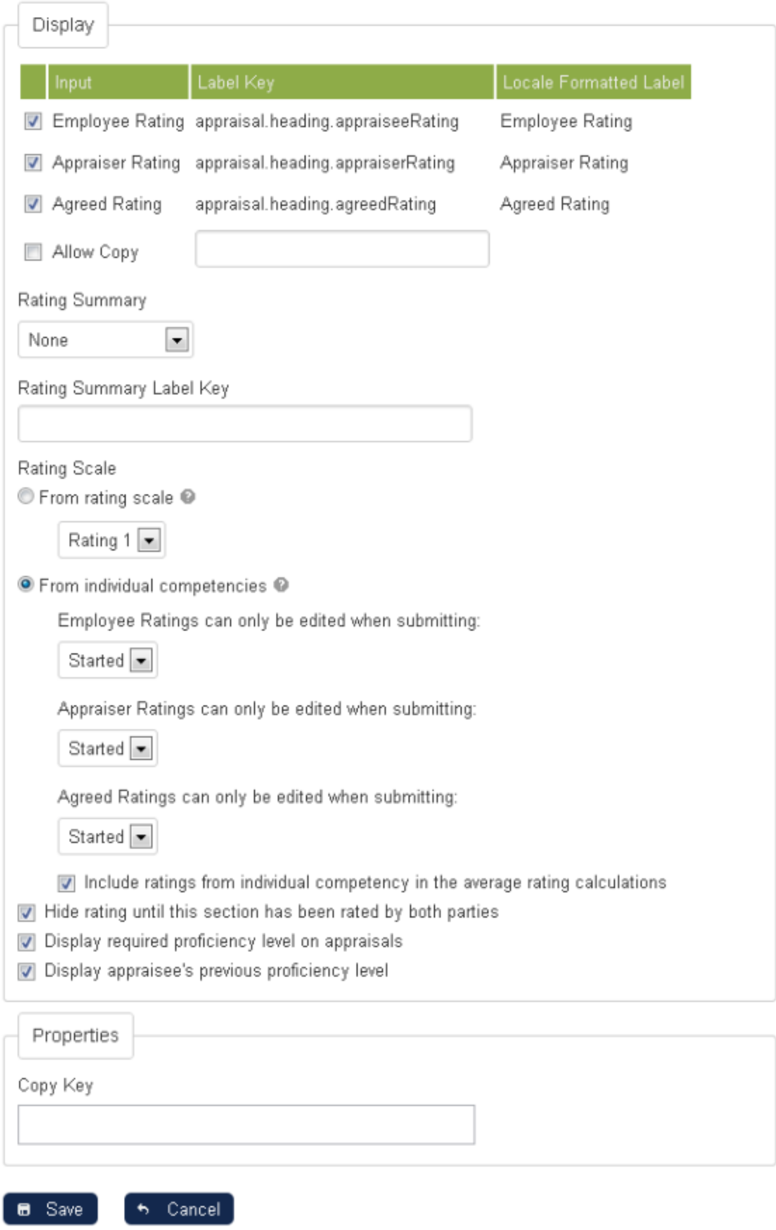
- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)

- ***Rating Summary and Rating Summary Label Key***
- ***Rating Scale***



- ***Columns***

Columns that can be incorporate on the past achievements section:

Competencies	Competency Source (see the competency source below)
Employee/Appraiser Comments	Free Text
Employee Rating	Drop down selector
Appraiser Rating	Drop down selector
Agreed Rating	Drop down selector

The competency column displays the competencies specified in the "Competency Source":

Option to include Job Profile based competencies in appraisals

If this option is checked, all the competencies of the job profiles assigned to the appraisee will be selected for the appraisal. It does not matter if competencies in the job profiles are acquired by training, by assessment, or by ad hoc assessment methods. In other words, no filtering is done for these competencies. By default, this option is turned on. If this option and the option to include existing user competencies in appraisals are both checked, the selected competencies for the appraisal would be the same as what are being selected for the past competencies appraisal section.

Option to specify the list of competencies to use in appraisals

Administrators can optionally specify an extra list of competencies to be included in the appraisal. The list of competencies will always be added to the appraisal regardless of which competencies the appraisees already have.

Option to include existing user competencies in appraisals

If this option is checked, all competencies awarded to the user will be selected for the appraisal. These are the competencies shown in the "My Competencies" in Career Development. By default, this option is turned on. If this option and the option to include job profile based competencies in appraisals are both checked, the selected competencies for the appraisal would be the same as what are being selected for the past competencies appraisal section.

Include ratings from individual competency in the average rating calculations

This option lets the HR manager who is editing the template to choose whether ratings from competency section are to be included in average rating calculations when the source of the rating is "From individual competencies".

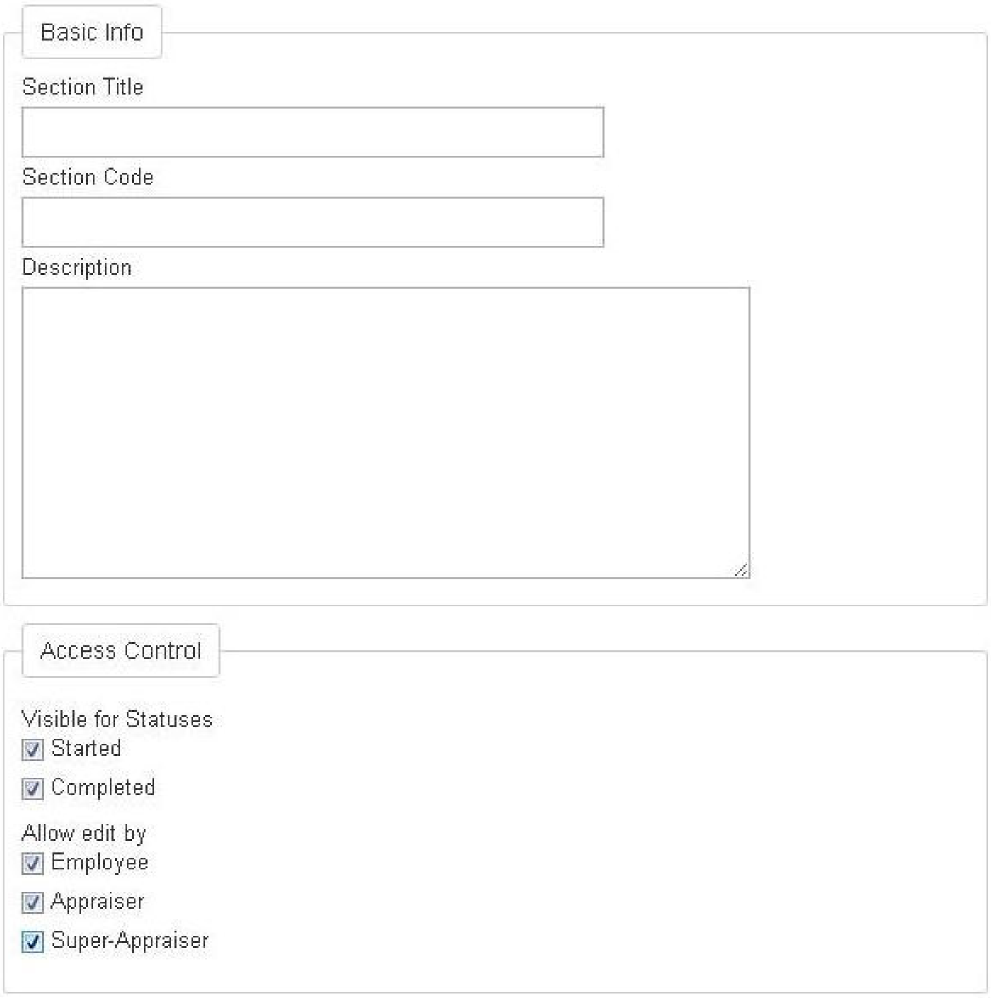
The option by default is checked which means the competency proficiency level would be taken into account when calculating the average rating in rating summary section.

Appraisal Dimension

Appraisal Dimensions is a section type that allows comments and ratings to be made against a fixed set of "dimensions".

Sample Appraisal Dimension

The appraisal dimension has the following configurations:

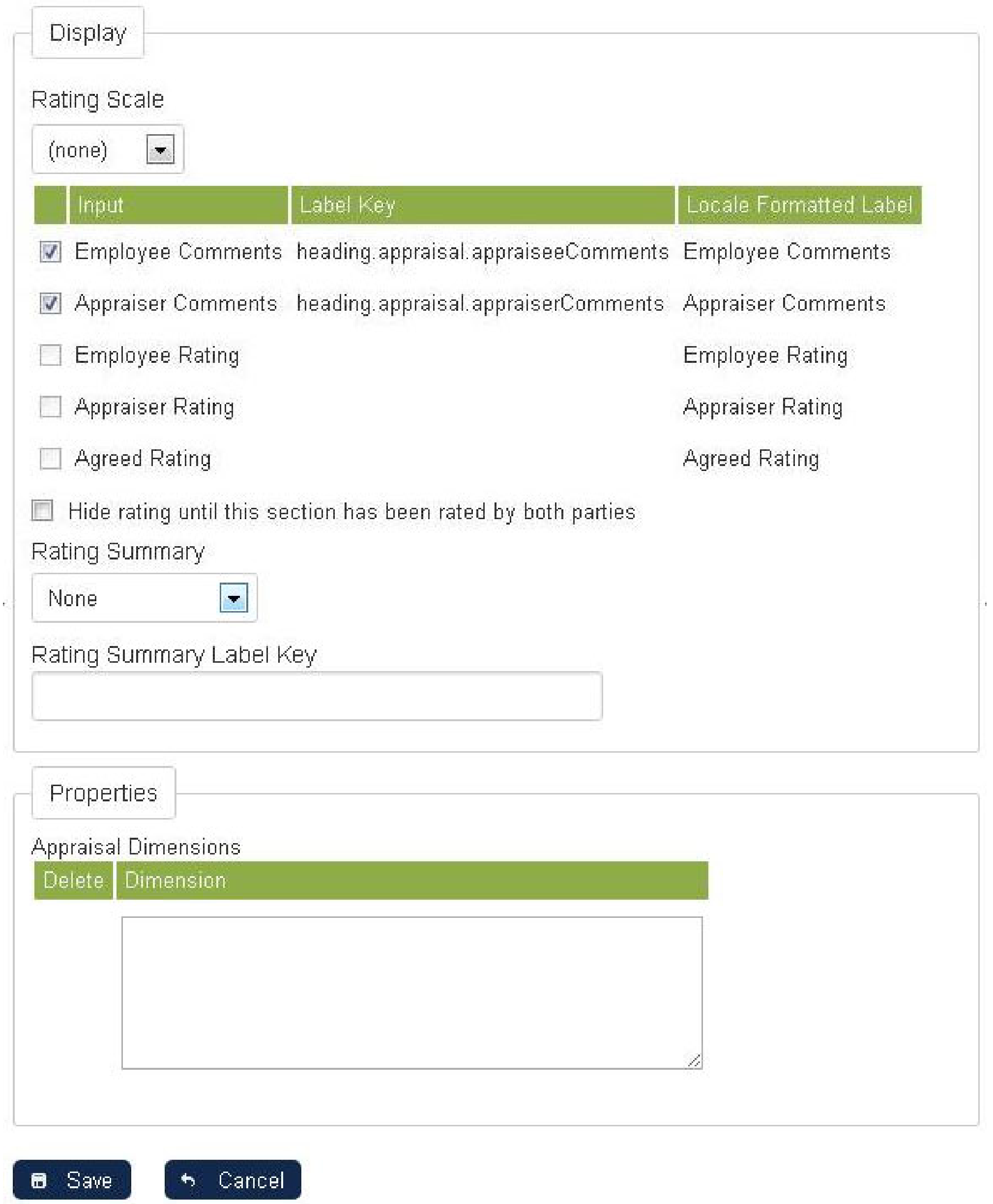


- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)



- ***Rating Summary and Rating Summary Label Key***
- ***Rating Scale***

If ratings are required, a rating scale should be selected and the appropriate rating column(s) enabled. If comments are required, the appropriate comments column(s) should be enabled. In this case, all comments and rating columns are required and are thus checked.

Columns

Appraisal Dimensions	Text areas
Employee's Comments	Text areas
Employee Rating	Rating Scale
Appraiser Rating	Rating Scale
Agreed Rating	Rating Scale

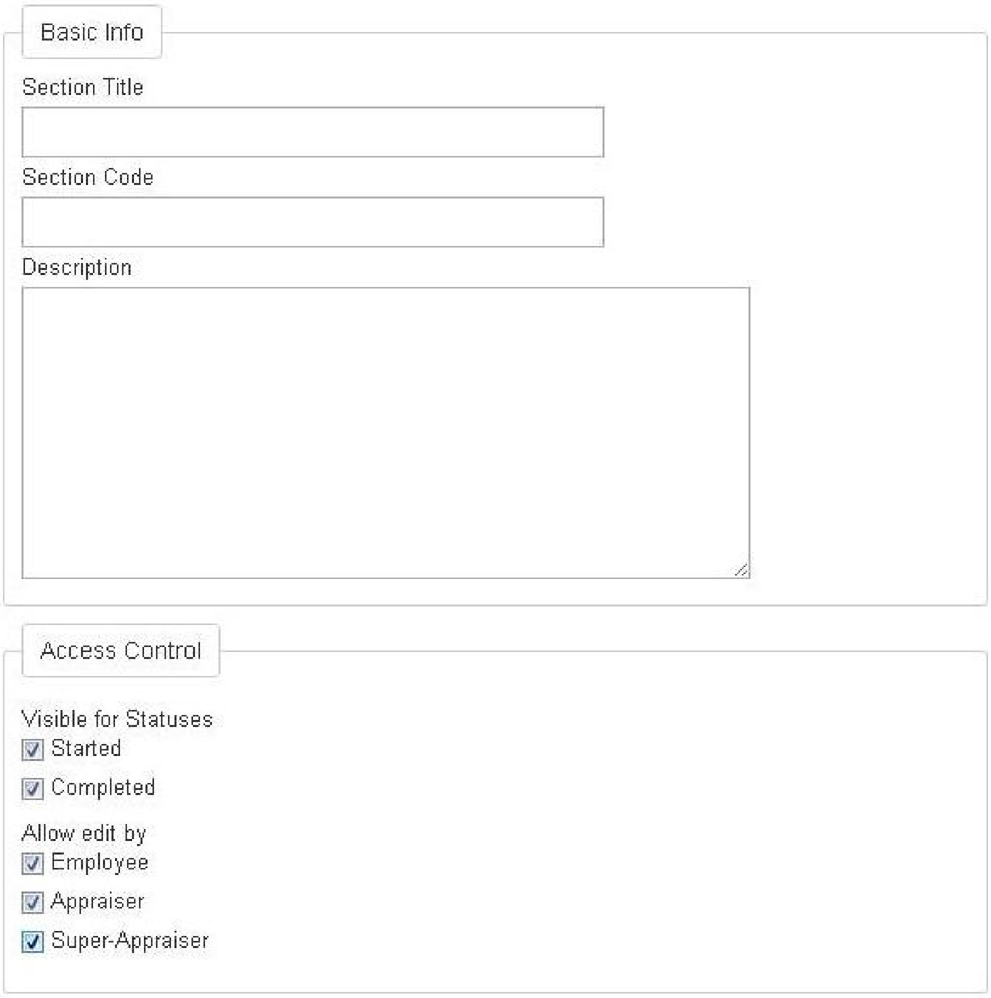
Goals Result

Determines on how goals will be added on the section. Below is a sample image on how a goal selection appears on the appraisal review.

Once the **Select Goals** button is clicked, the menu for selecting menu is displayed as shown below:

The menu allows you to select which goals to add (Performance Goals or Organizational Goals). It displays details such as start and Target Dates, Description, Measurement and Milestones, Progess Details, and Status.

To add the goal, click the **Plus** button positioned at the end of each goal. This section can be configured when selecting the Goals Selection section types:



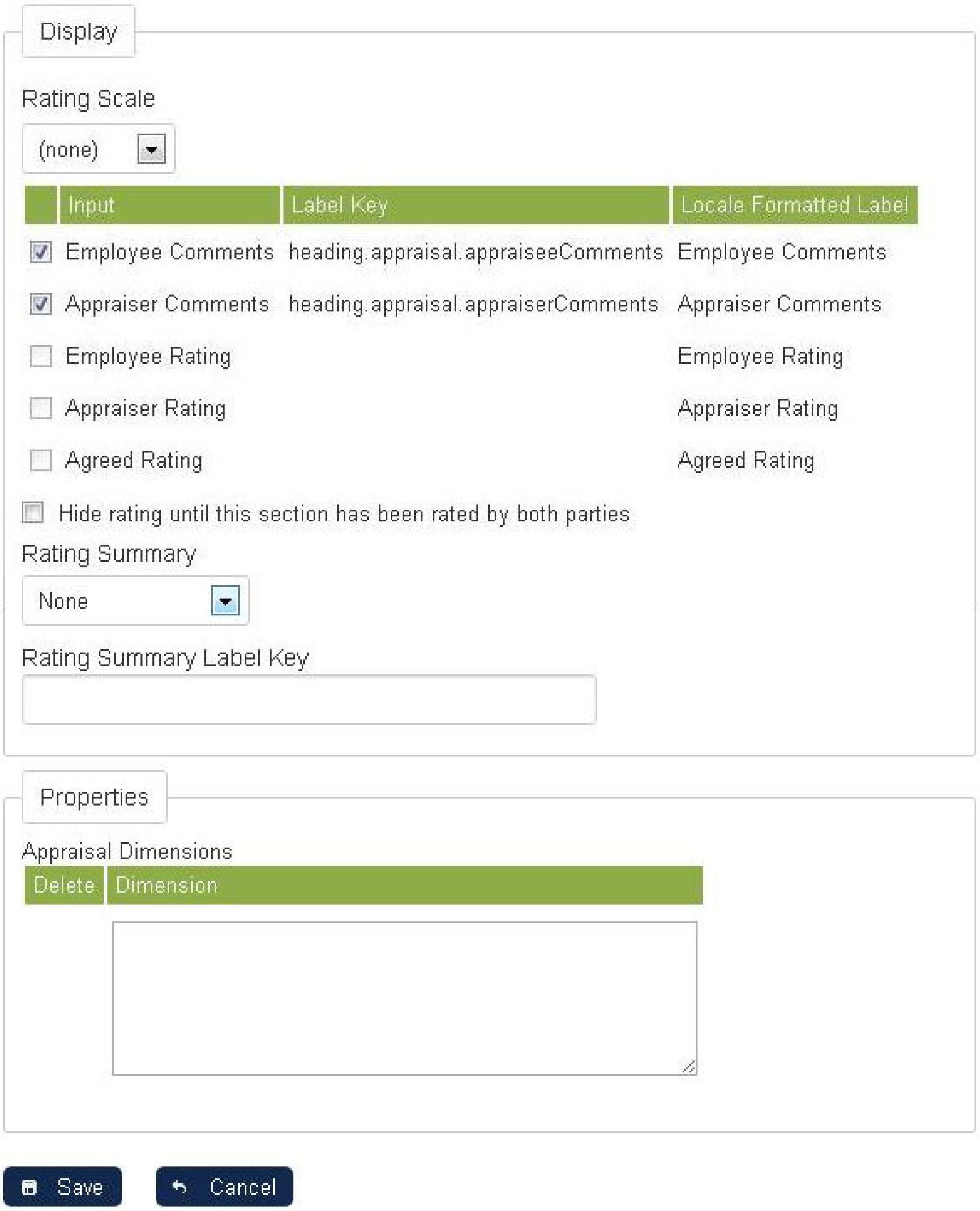
- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)

- ***Goal Selection***
  - ***Automatic*** All Selectable Goals will be added automatically.
  - ***Manual*** Allow goals to be selected from the appraisee's goals;Allow performance goals to be created/edited from within the appraisal because once an appraisal is started, appraisee's goal list will be locked and he will not able create/edit goals even they find some goals missing or incorrect; Goals created within an appraisal will be included by default.



- ***Rating Scale***
- ***Rating Summary and Rating Summary Key Label***

Columns

Goal Selection	Text areas
Employee Comments	Text areas
Appraiser Comments	Text areas
Employee Rating	Rating Scale
Appraiser Rating	Rating Scale
Agreed Rating	Rating Scale

Future Objectives

Future Objectives sections allow the user to set objectives for the coming appraisal period. If configured, user entered data can be copied from past achievements or past competencies sections and can also be carried forward to the user's next appraisal.

The Future Objectives section can be set up using the following configuration:

- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)

- ***Allow Copy and Copy Key***

(See the description on the Free Text section)

- ***External Content URL***
- ***With***
- ***Height***
- ***Maximum Objectives***

Enter the maximum number of objectives to be entered in the past achievements section.

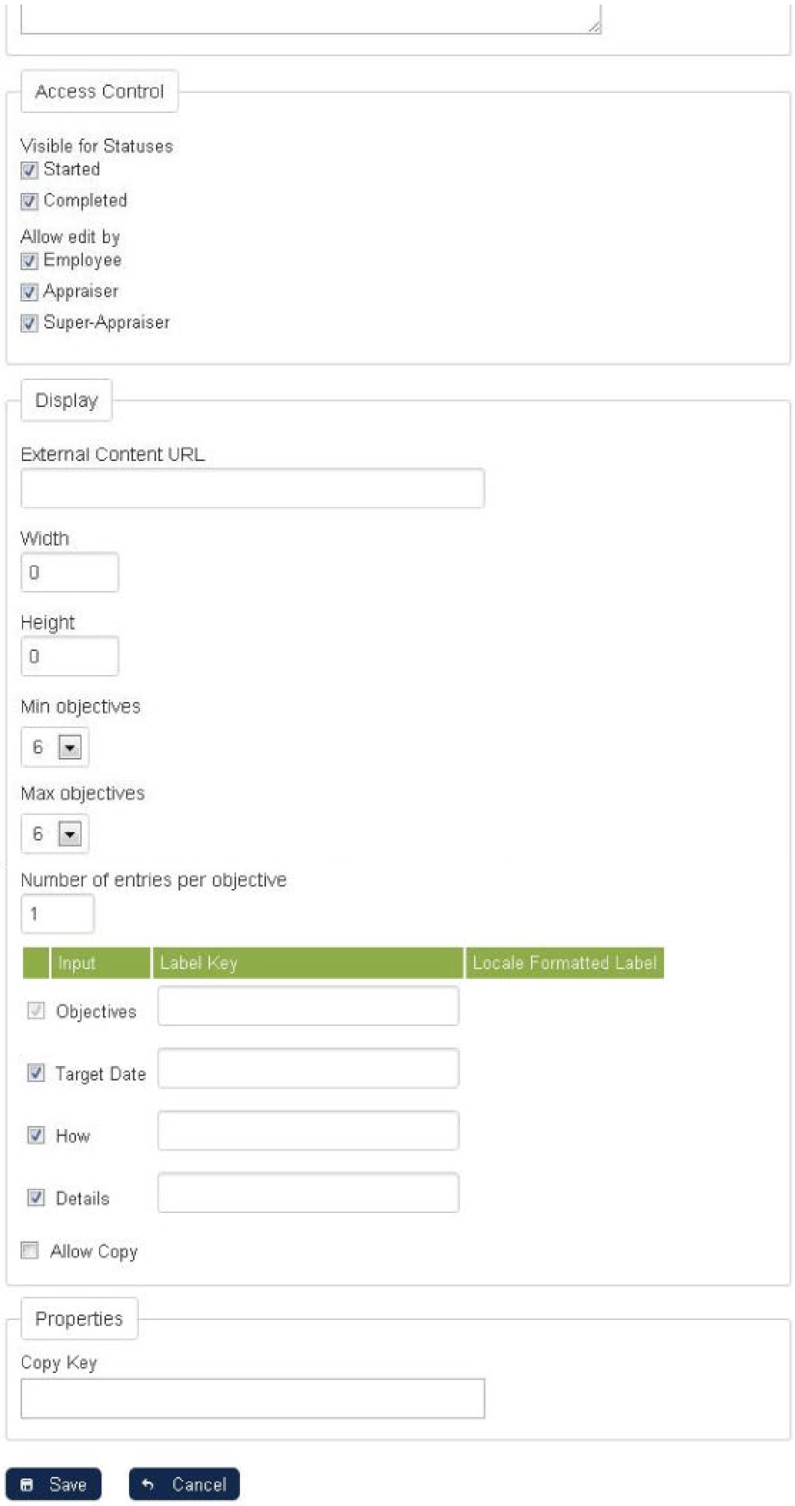
- ***Number of entries per objective***

Set the number of entries per objectives.

- ***Columns***

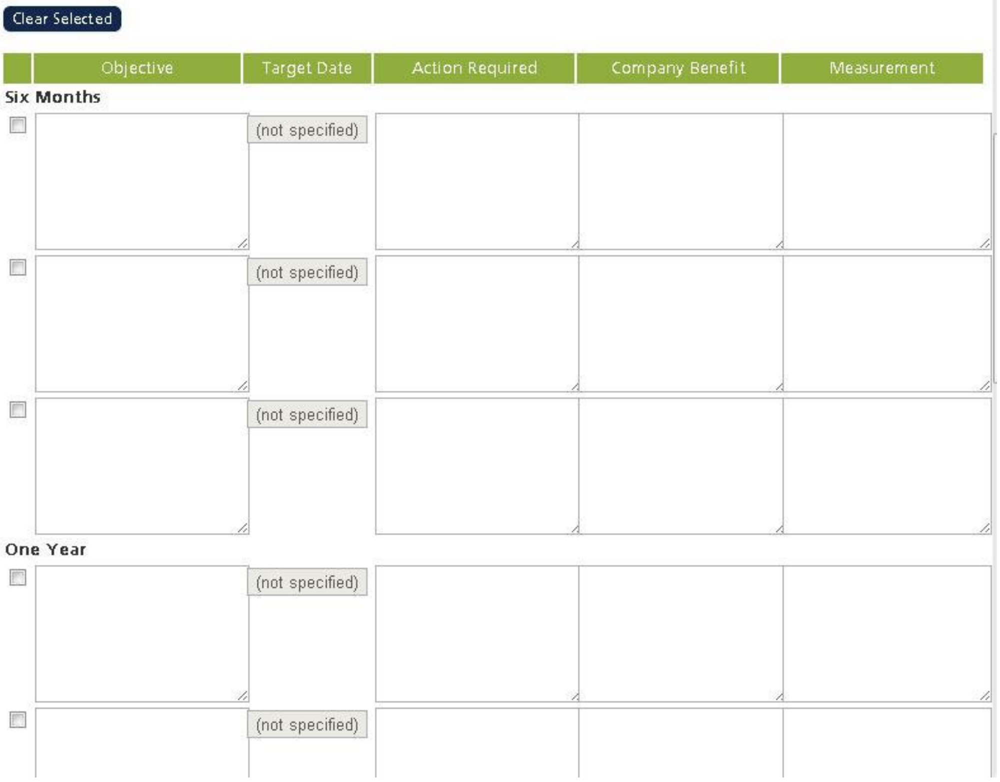
Columns that can be incorporate on the past achievements section:

Objectives	Text Area
Target Date	Date Selector
How	Text Area
Details	Text Area

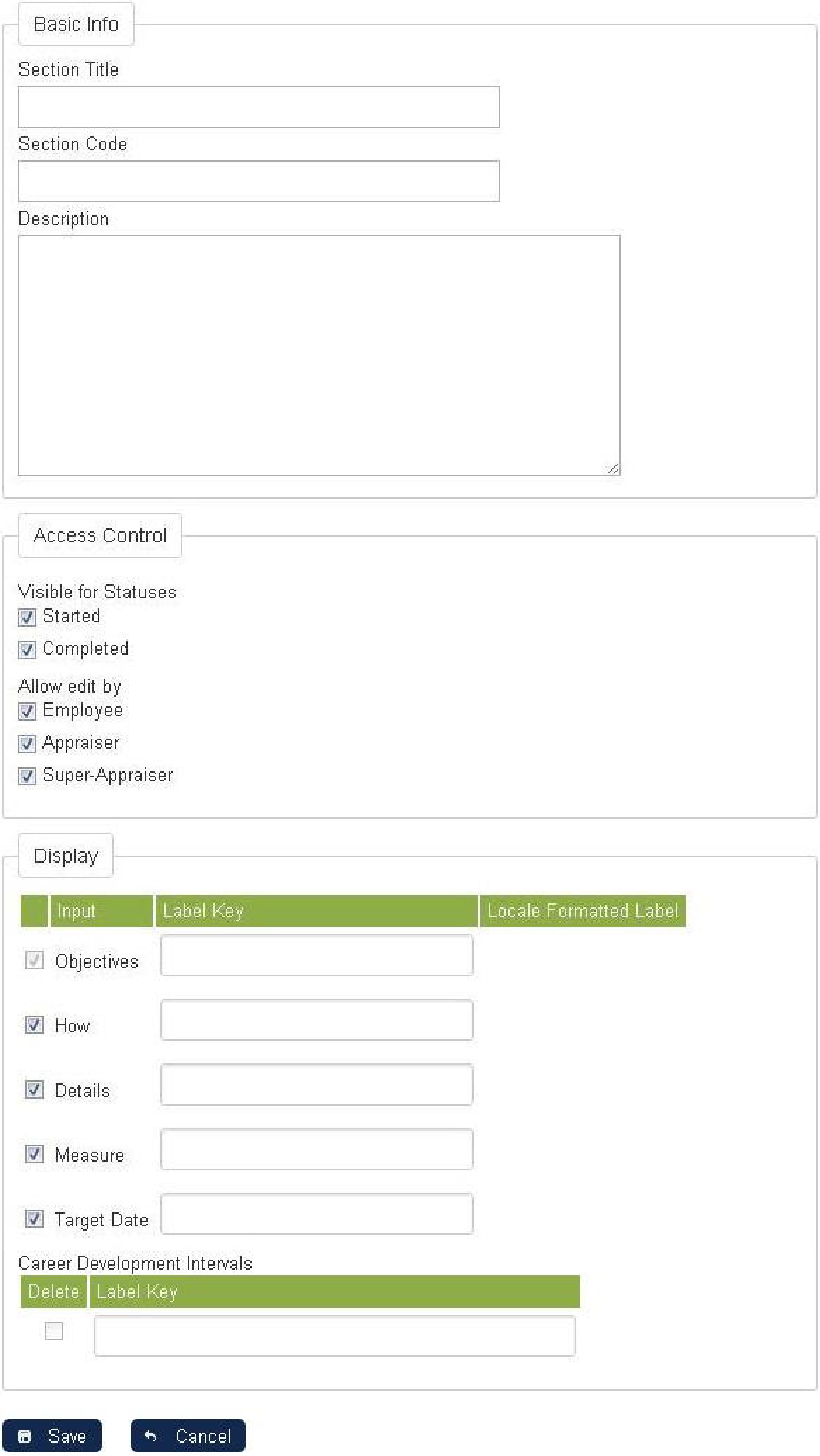

Access Control
Visible for Statuses
Started
Completed
Allow edit by
Employee
Appraiser
Super-Appraiser
Display
External Content URL
Width
0
Height
0
Min objectives
6
Max objectives
6
Number of entries per objective
1
Input
Label Key
Locale Formatted Label
Objectives
Target Date
How
Details
Allow Copy
Properties
Copy Key
Save
Cancel

Career Development

The Career Development section type offers an objective defining matrix that is grouped by labels. Users can enter as many rows under each grouping as required and, for convenience, the objectives entered here will automatically be copied over to the appraisee's next appraisal.



Typically, the labels would be time intervals though they can in fact be any text up to 1000 characters in length. The labels are specific to each Career Development Section and are configured under *Career Development Intervals*. See Appraisal Columns for more information on how to configure the columns in the table. The above form can be produced using the following configuration:


Basic Info
Section Title
Section Code
Description
Access Control
Visible for Statuses
Started
Completed
Allow edit by
Employee
Appraiser
Super-Appraiser
Display
Input
Label Key
Locale Formatted Label
Objectives
How
Details
Measure
Target Date
Career Development Intervals
Delete
Label Key
Save
Cancel

Goal Plan

Users can create performance goals via the past achievements part or the future planning part of their appraisal, and these goals will be viewable from the appraisal and in his/her own Performance Goal list. After the appraisal is completed, the user can continue to manage his/her goals in the Performance Goal area.

The Goal Plan section can be set up using the following configuration:

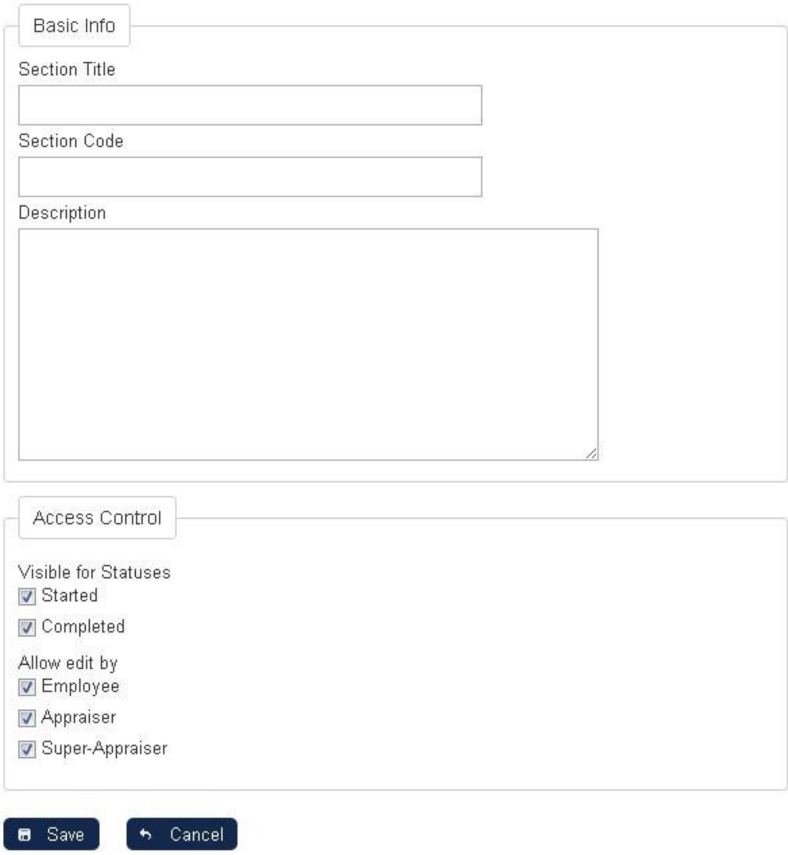
- ***Section Title***
- ***Section Code***
- ***Description***
- ***Visible for status***

(See the description on the Free Text section)

- ***Allow edit by***

(See the description on the Free Text section)

Note: The goals created in the appraisal also shows in Career Development, Goals.



Succession Planning

Succession Planning is a new section type that allows managers to establish the promotion characteristics and retention risk for each of their staff:

- Users, with access rights to both Manage Menu and Appraisal Manager, can manage the Succession Planning Section in an Appraisal Template with different question types and user defined scores.
- Users, with access rights to do appraisals, can perform a Succession Planning Review in an Appraisal.
- "Plot 9-box Promotion Potential Report" has been added to Review Bulk Action.

The section type is only available in the Sign Off step of the appraisal. At most one Succession Planning section can be added to a Sign Off page.

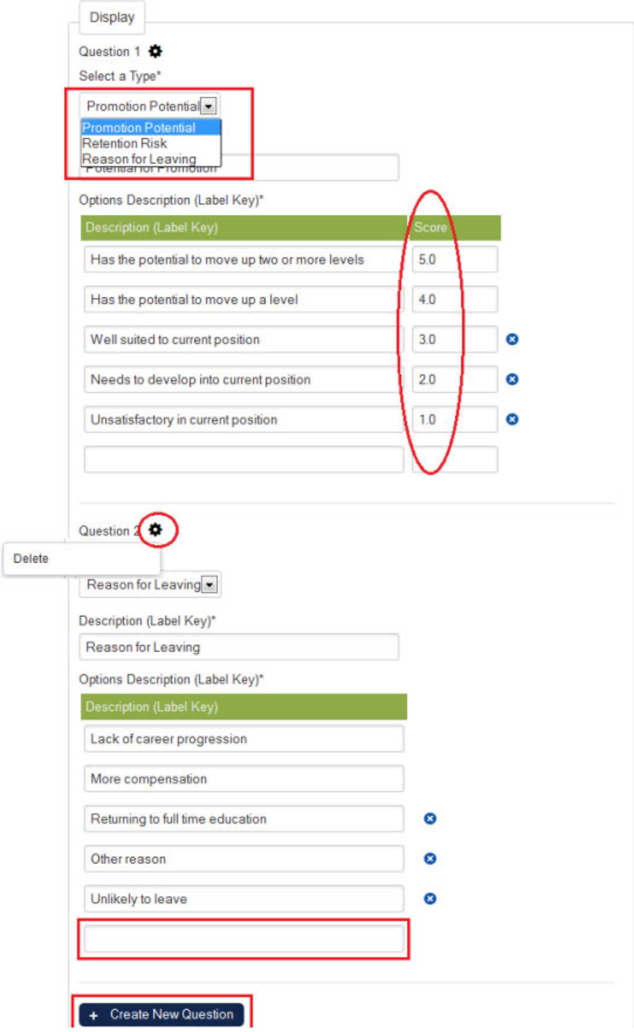
- **Access Control**

As with all other appraisal section types, Section title, Section Code, Description, and Visible for Statuses can be specified. This section type can be configured to Allow edit by the appraiser and/or the super appraiser, but never by the appraisee at any point. Also, in the appraisal template, users can configure the status under which Appraiser Selection must have been made when submitting the appraisal form.

- **Setting up Succession Planning Question**s

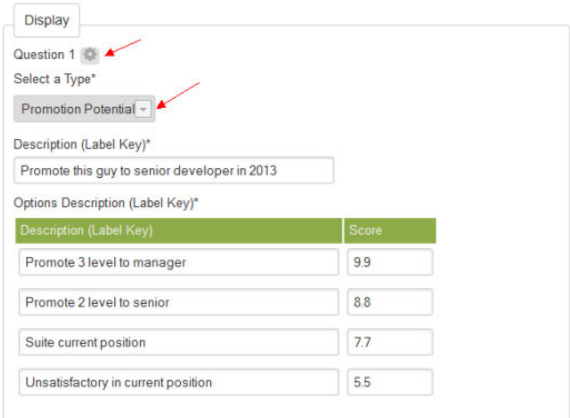
In the Succession Planning section, at least one single choice question should be setup, with each question associated with at least two answer options. There are three types of questions, namely Promotion Potential, Retention Risk, and Reason for Leaving. For Promotion Potential and Retention Risk question types, distinct non-negative scores should be given to the answer options for future promotion/retention analysis.
To create a new question, click the "Create New Question" button at the bottom of the Display legend. Once a question is created, Select a Type, enter the question Description and Option Description. If necessary, click on the last empty option field to create new options, click the cross button at the right

end of an option to delete the option, and click the gear button to popup the action menu to delete the question.



- **Update Restriction after the Appraisal Started**

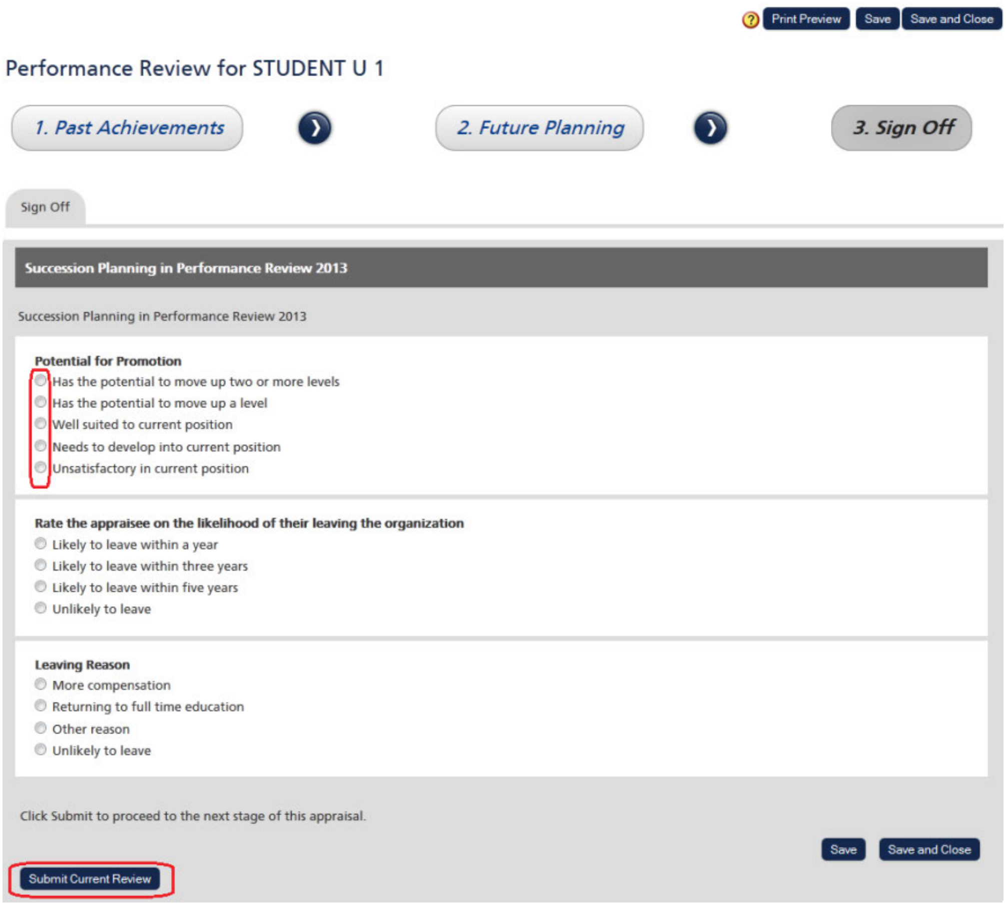
In general, any major structural change to an appraisal template is disabled after an appraisal has been started using the template. In the Succession Planning section, after appraisal start-up, users cannot add/delete questions/options or change the question type. Users can still edit the question description, option descriptions and scores.



- **Succession Planning Section - Review in Appraisal**

After starting an appraisal with a template with a succession planning section, the appraiser or super appraiser, but not the appraisee, can view the succession planning questions. Depending on the "Allow edit by" setting in the template, the appraiser or super appraiser may answer the questions (by clicking the radio buttons).

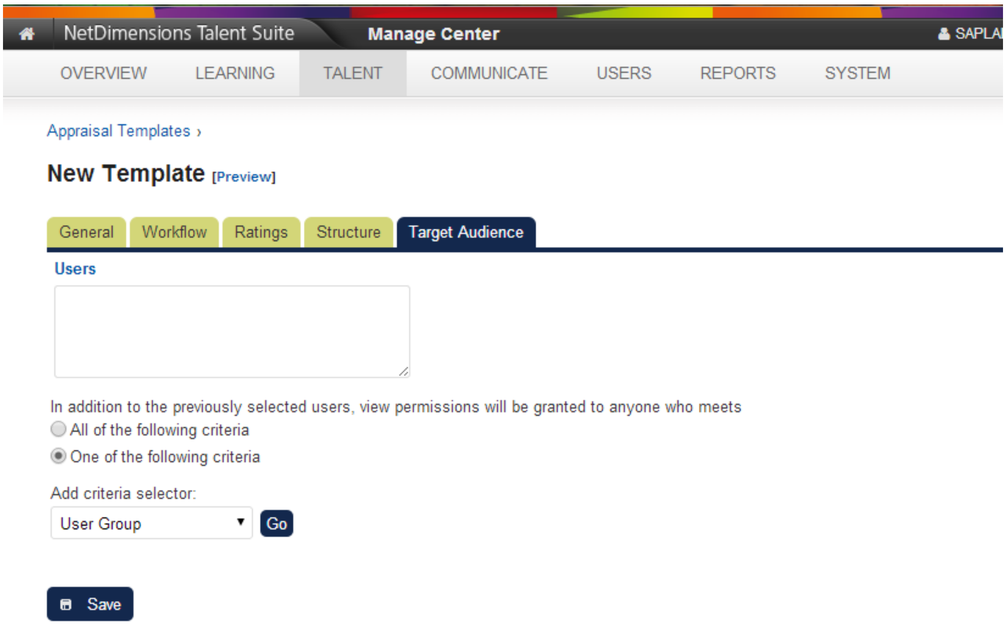
- All questions must have been answered before submitting the appraisal form under the status as configured in the template.
- Any new attempt of the questions, if not explicitly saved/submitted by the user, will be auto-saved after 5 seconds.
- After save, the scores of the selected answer options, as defined in the template, will be stored in the system for further promotion/retention analysis (such as plotting the 9-box report).



Setting Target Audience of the Appraisal Template

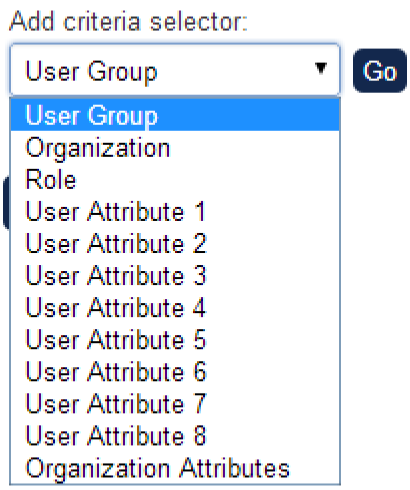
This feature allows the appraisal template to be visible or available for specific users only. To do this, click on the name of the template you wish to configure.

The Appraisal Template Editor screen opens on a new window. Click the Target Audience Tab. Click the **Save** button to keep the settings.



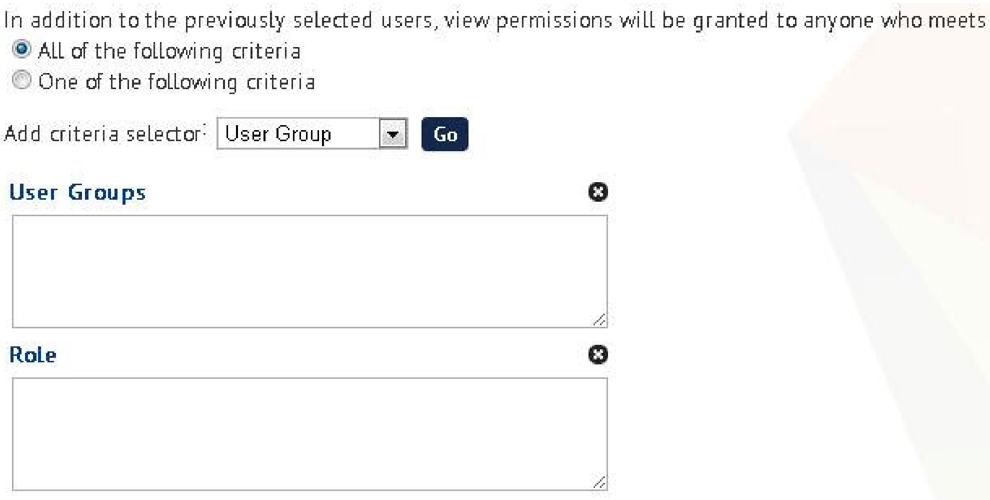
On this tab you can set the target audience the following way:

- To select a specific user click the **Users** link. This opens the menu for selecting the user.
- You can also set criteria wherein the user(s) who will meet these criteria will have the permission to view or use the appraisal template. To do this:
    - Add the criteria using the **Add criteria selector** drop down menu, then click the **Go** butto n.



- The selector of the selected criteria is displayed right after the **Add criteria selector**. For instance, you selected the "user group" criteria; the user group selection box is displayed as shown on the image.

- Click the **User Groups** link to display the menu for selecting the user group.
- You can add another criterion using the **Add the criteria selector** from the drop down menu. For instance this time you select **Organization.** The organization selection box is displayed as shown on the image.



Once you are done in selecting the criteria, you may now select between the following:

All of the following criteria

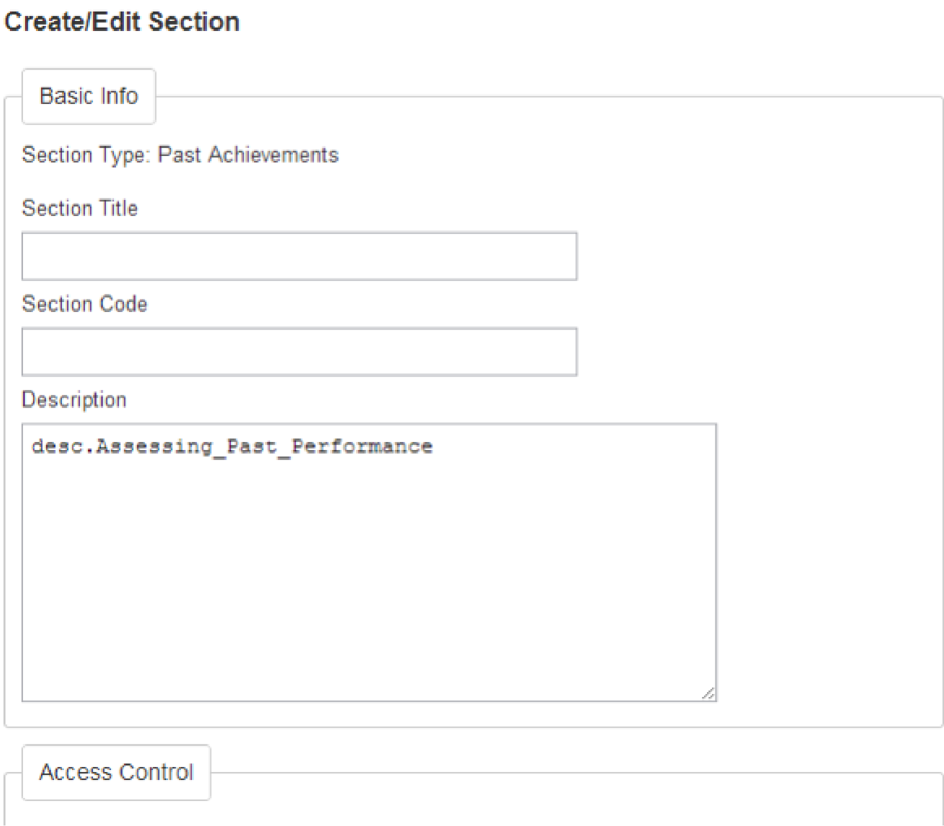
Choosing this option means that all user who belongs to the selected user groups **AND** role will have the access to the appraisal template.
A user who belongs to one of the criteria only will not be given the permission to view or use the appraisal template.

One of the following criteria

Choosing this option means a user who belongs to any of the criteria will have the permission to view or use the appraisal template.
For example, a user belong to the user group but not on the role specified on the criteria will still have the access to view or user the appraisal template.

Resource Bundles

Most text entered in the appraisal template editor can be replaced with a bundle key so that text will be translated to the target user's language in multilingual sites (provided the corresponding translations are in the relevant custom.properties files).



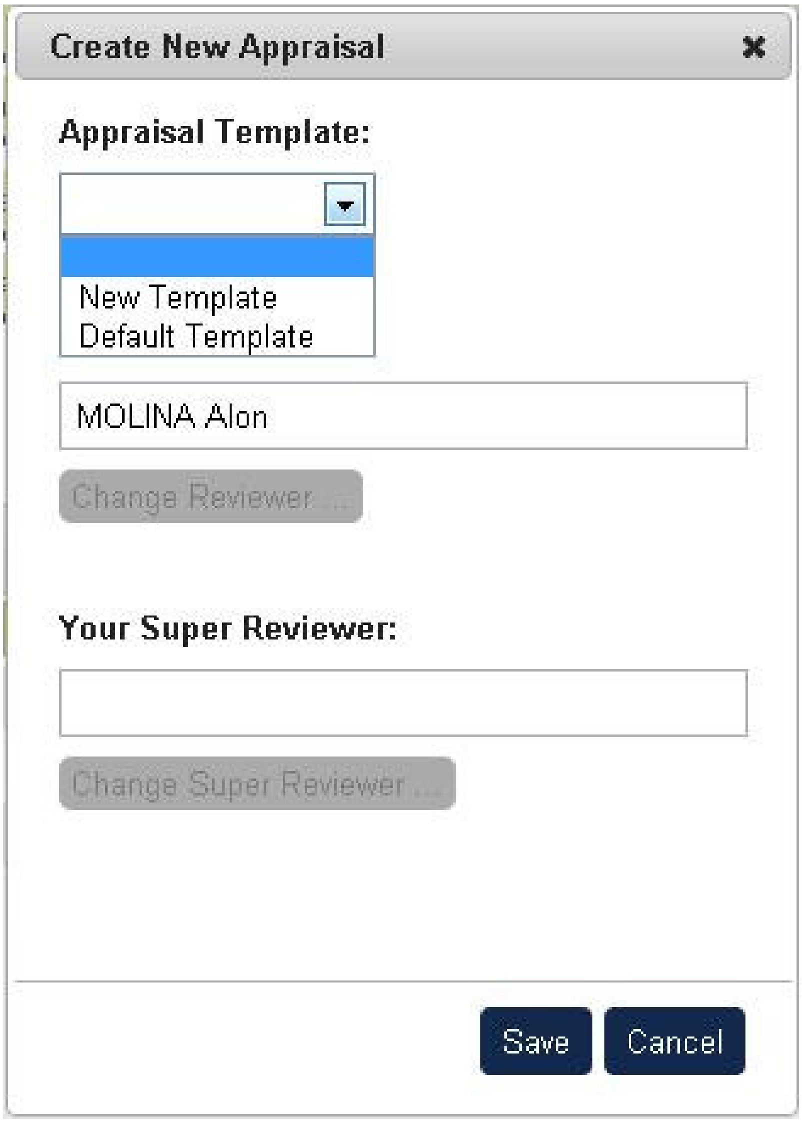
Appraisal Enhancements

Multiple Active Templates

This enhancement allows more than one appraisal template to be active and as such, the user interface of the appraisal template list has changed. The templates are selected with check boxes, and the administrator can perform batch delete, activate, deactivate and clone on the selected items.

Click **Activate** Selected. Selected items become active.

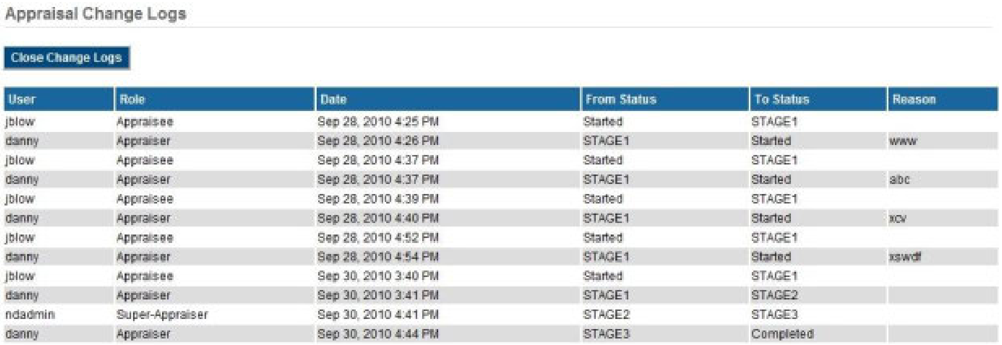
Users can select the template from the list of active appraisal templates when they start an appraisal. If selected, the system will generate an appraisal form with a structure as defined in the selected template. The appraisal will then be tied to that template and will remain the same thereafter even if the template is deactivated. As such, only templates with '0' as No. of Appraisals can be deleted.



Audit Log for Status Change of Appraisal Form

Users with appraisal administrative rights can view the change logs of appraisals. To view the change logs of an appraisal, click Change Logs when an appraisal is opened.

The appraisal change logs display all the details of status changes associated with the current appraisal.

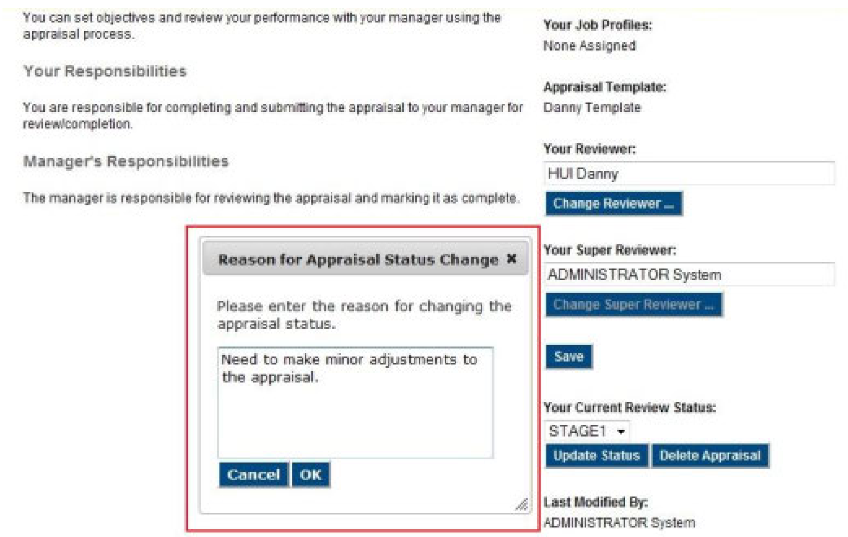

Appraisal Change Logs

Close Change Logs

User	Role	Date	From Status	To Status	Reason
jblow	Appraisee	Sep 28, 2010 4:25 PM	Started	STAGE1	
danny	Appraiser	Sep 28, 2010 4:26 PM	STAGE1	Started	www
jblow	Appraisee	Sep 28, 2010 4:37 PM	Started	STAGE1	
danny	Appraiser	Sep 28, 2010 4:37 PM	STAGE1	Started	abc
jblow	Appraisee	Sep 28, 2010 4:39 PM	Started	STAGE1	
danny	Appraiser	Sep 28, 2010 4:40 PM	STAGE1	Started	xcv
jblow	Appraisee	Sep 28, 2010 4:52 PM	Started	STAGE1	
danny	Appraiser	Sep 28, 2010 4:54 PM	STAGE1	Started	xswdf
jblow	Appraisee	Sep 30, 2010 3:40 PM	Started	STAGE1	
danny	Appraiser	Sep 30, 2010 3:41 PM	STAGE1	STAGE2	
ndadmin	Super-Appraiser	Sep 30, 2010 4:41 PM	STAGE2	STAGE3	
danny	Appraiser	Sep 30, 2010 4:44 PM	STAGE3	Completed	

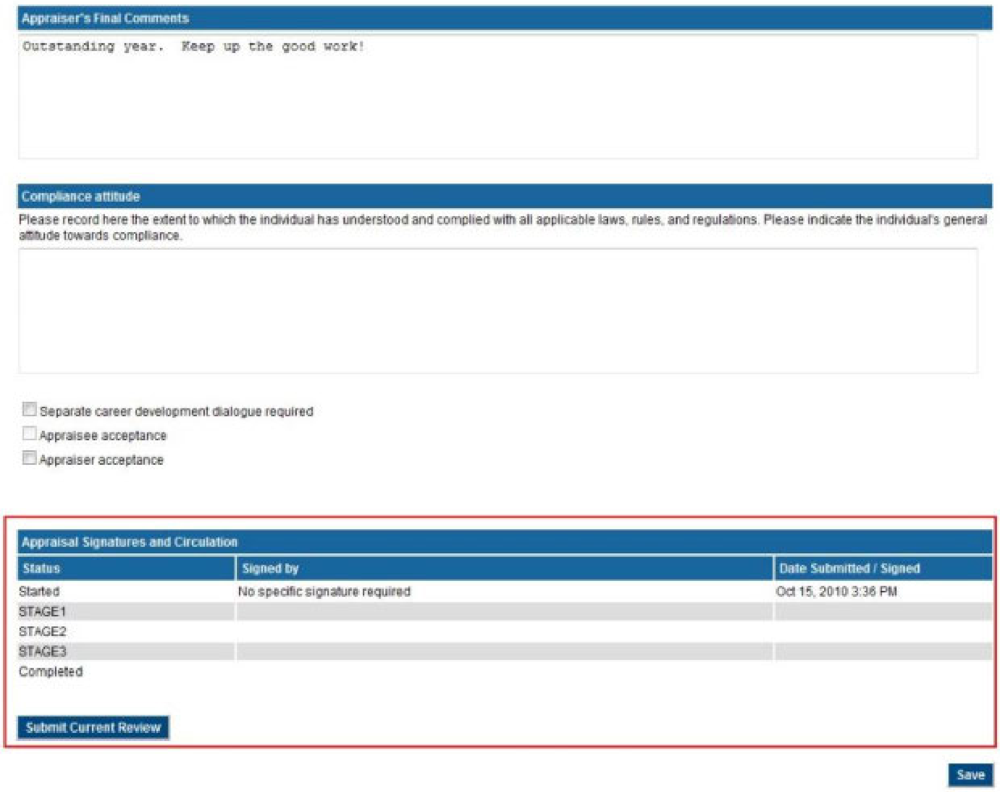
Prompt for Reason when Reversing/Re-opening Appraisal Status

The system will prompt for the reason of appraisal manual status change and appraisal re-open actions. The reason is mandatory, and will be shown in the appraisal change logs.

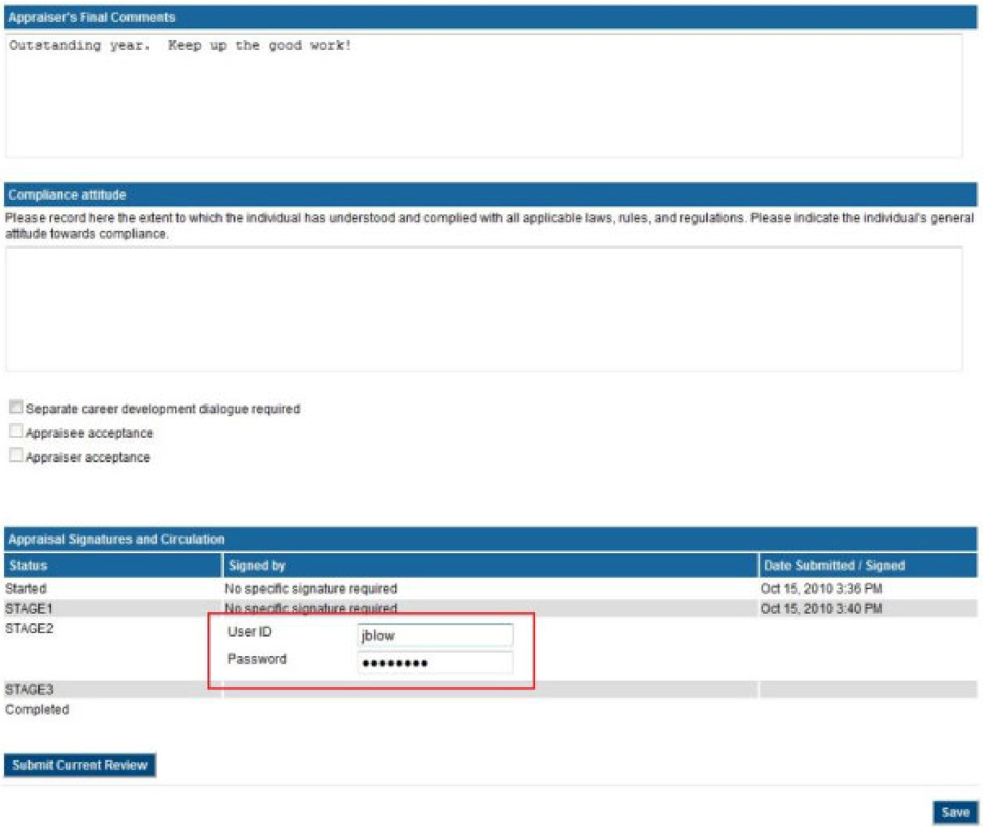


Signature and Circulation Records on Sign-Off Page

The signature and circulation records are shown in the sign-off page of an appraisal if any of the status in the appraisal flow requires a signature. It displays the date and time that each status is completed, and if the status requires a signature, the user ID of the signer is also displayed.



The input boxes for user ID and password are displayed at the appropriate status when a signature is required.

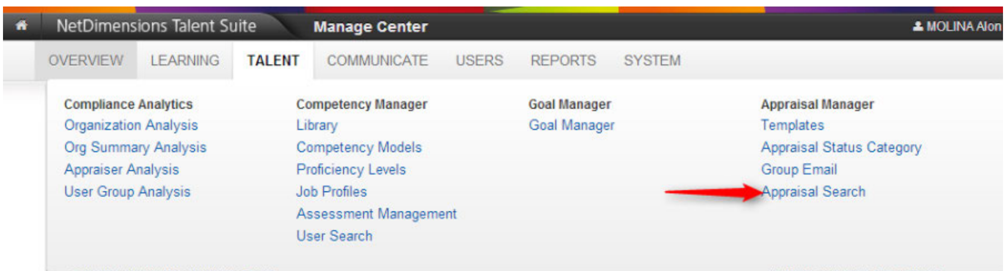


Appraisal Search

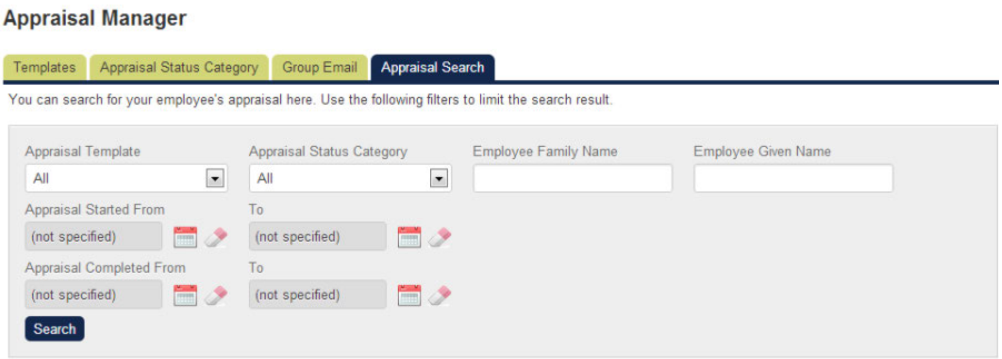
This enhancement allows either of the following:

1. Managers to search for appraisee's' appraisal forms
2. Administrators to search for all users' appraisal forms

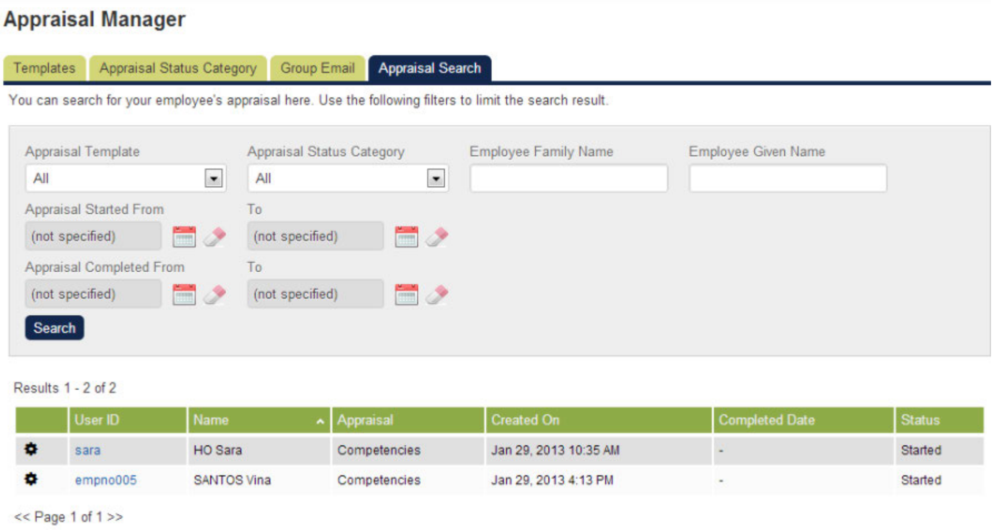
To access this function, click **Manage Center> Talent >**, under the *Appraisal Manager* click the **Apprai sal Search** link.



The Appraisal Search page appears. Search for your employee's appraisal here. Use the following filters to limit the search result.



Click on the link on User ID to launch the searched appraisal.



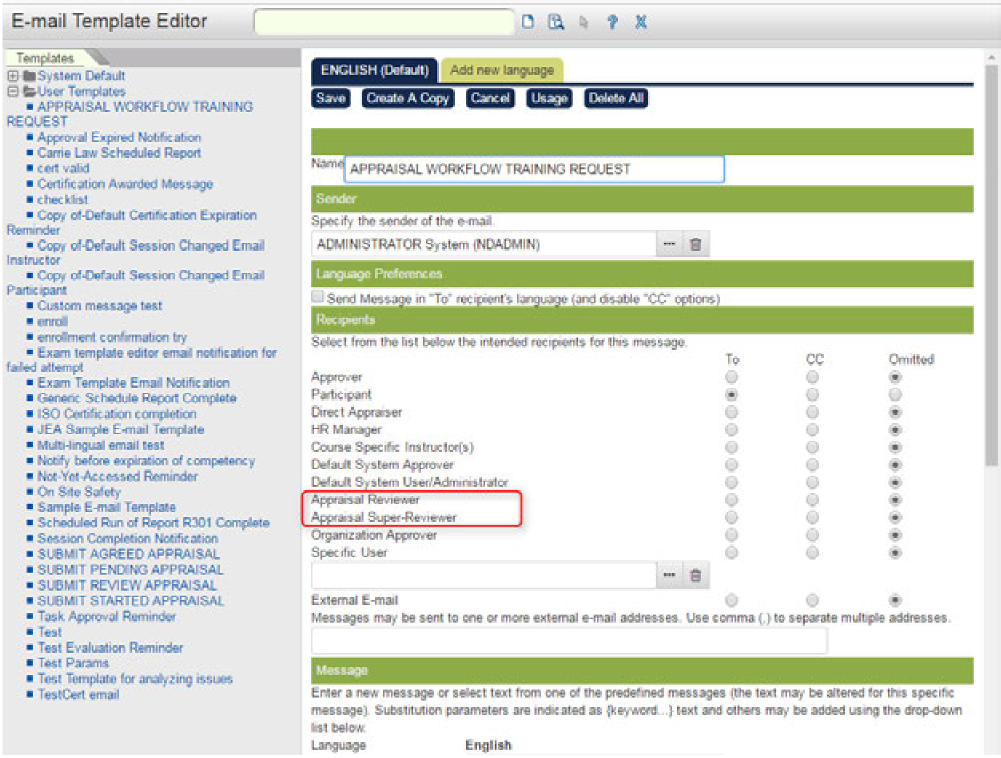
If your user account has the data access role 'Allow Review Employee All User Appraisals' set to **Yes**, you can see all of the appraisals for all users normally visible to you. This is usually those users for whom you are an appraiser. If you do have a system administration role then you may bbe able to see appraisals for all users.

To open and perform administrative functions on appraisals, your user account must have the data access role 'Allow User Appraisal Administration' set to **Yes**. If you open an appraisal that has not been completed yet, the introduction page of the appraisal form is shown. You can make changes to appraisal properties like reviewer or super reviewer. If the appraisal has been completed, the appraisal form opens directly.

E-mail Template Editor for Appraisal E-mails

The Configurable Appraisal Workflow allows up to two e-mail templates to be selected per appraisal status. Such e-mails will be sent when the performer submits the appraisal in the respective statuses.

- To send to the appraisee, the existing "Participant" recipient should be enabled
- To send to the appraiser, the new "Appraisal Reviewer" recipient should be enabled
- To send to the super-appraiser, the new "Appraisal Super-Reviewer" recipient should be enabled

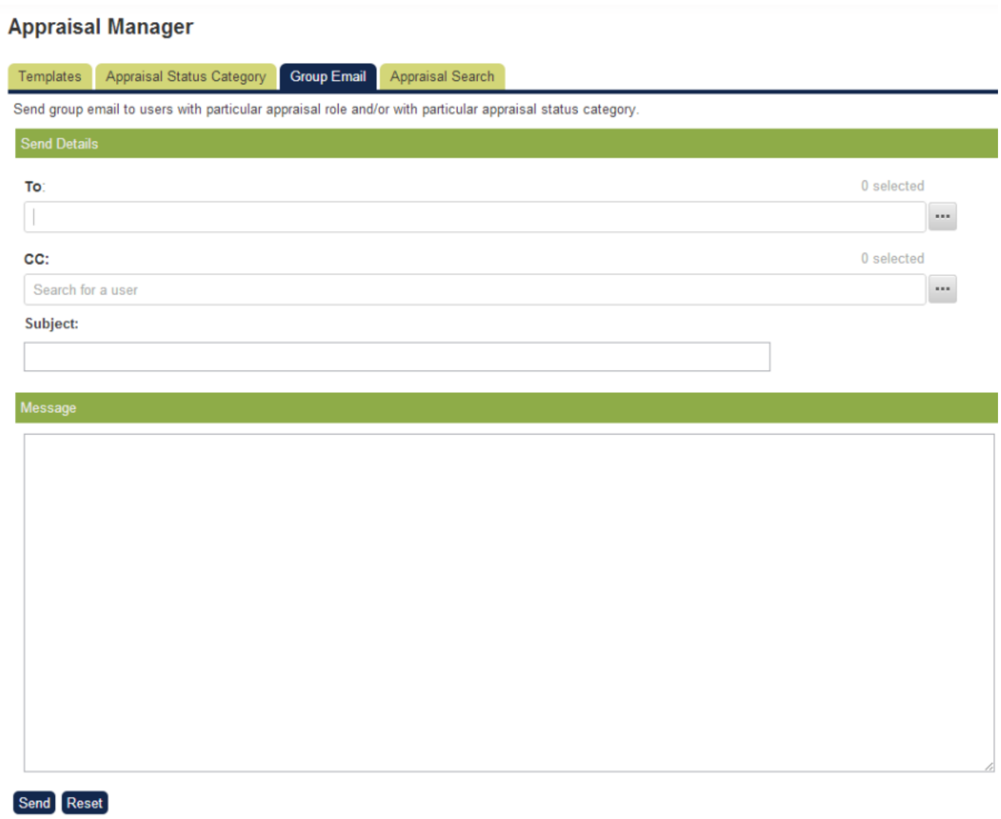


Group E-mail to Appraisal User

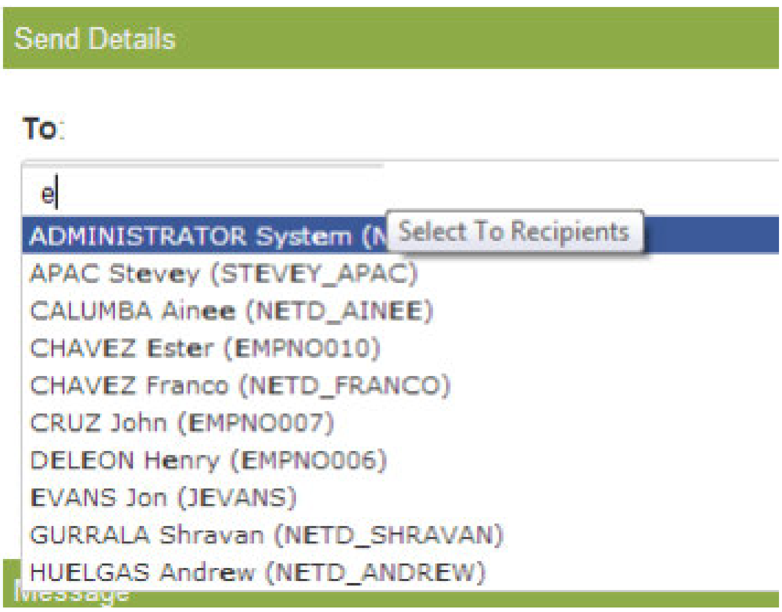
This enhancement allows administrator to send email to a group of users with specific appraisal role and appraisal status. For example, send a email to all appraiser with Pending status to remind them to review their appraisees' appraisal form.

To access this feature, click **Manage Center> Talent >**, under the *Appraisal Manager* click the **Group Email** link.

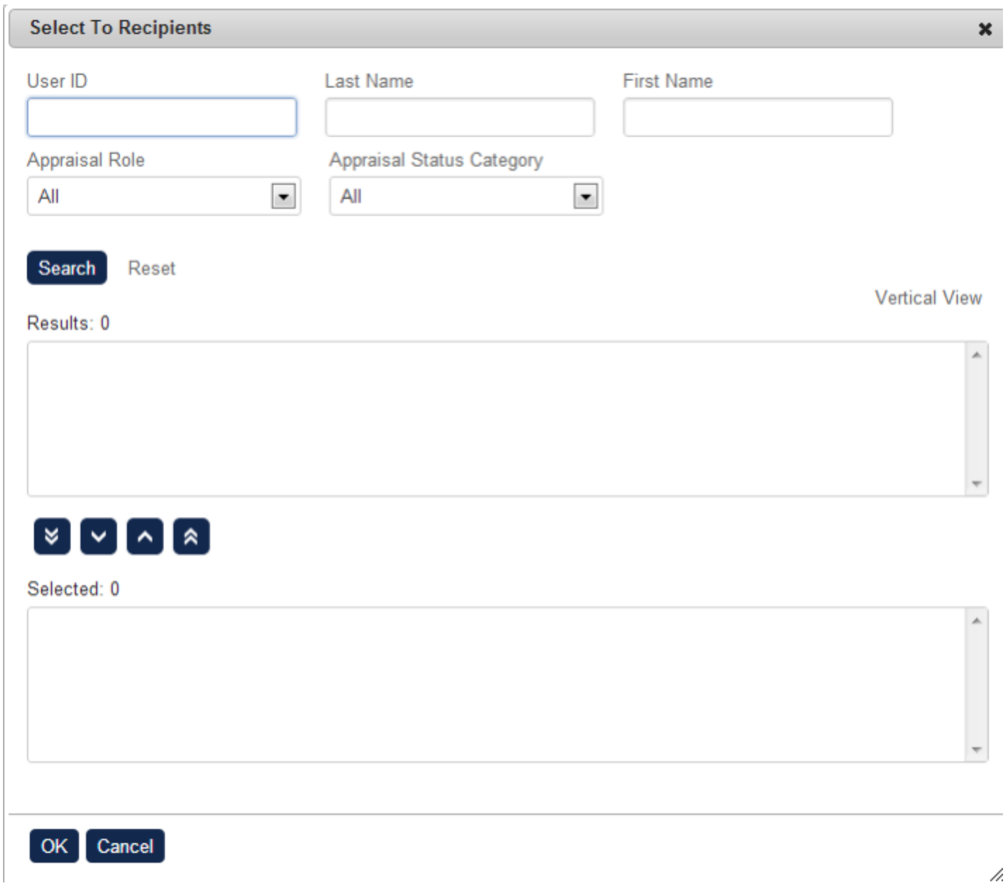
The *Group Email* page appears. Click on the link on To/Cc to select recipients of the email. The Select To/Select CC screen appears.



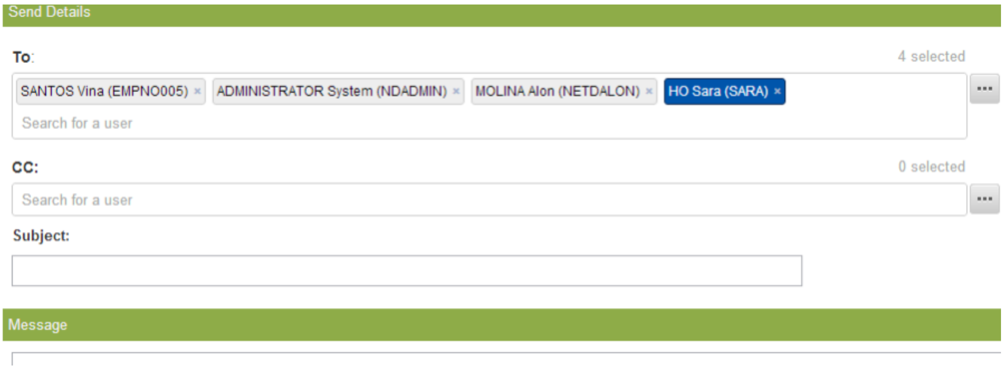
From here, the user can enter search keyword into the quick search box, and the system will return matching results as the user types.



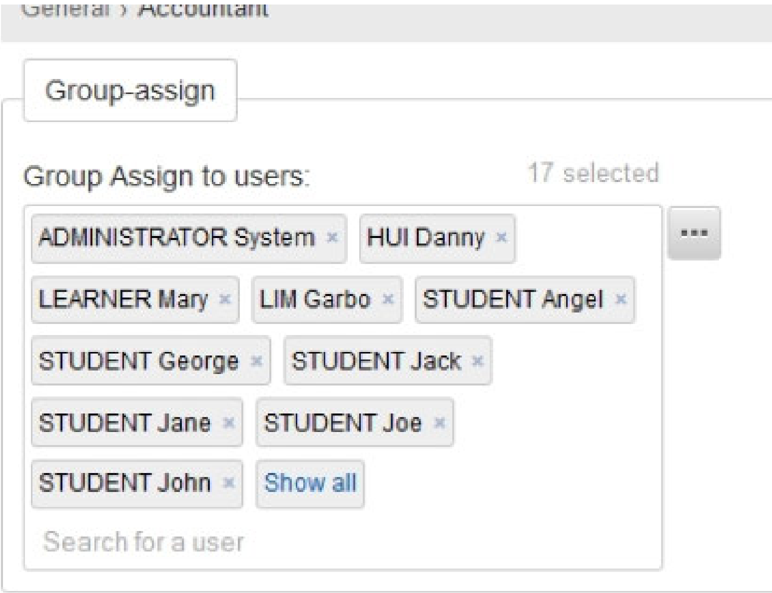
To open the advanced search interface, the user can click the "..." box beside the quick search box. From this user selector, you can look for user with basic user information like User ID, Family Name or Given Name; and appraisal related information like Appraisal Role and Appraisal Status.



The advanced search interface looks very similar to the original user selector pop-up box, but the user can switch between horizontal arrangement and vertical arrangement for the search result box and the selection box. After selection, the selected recipients will be displayed.



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

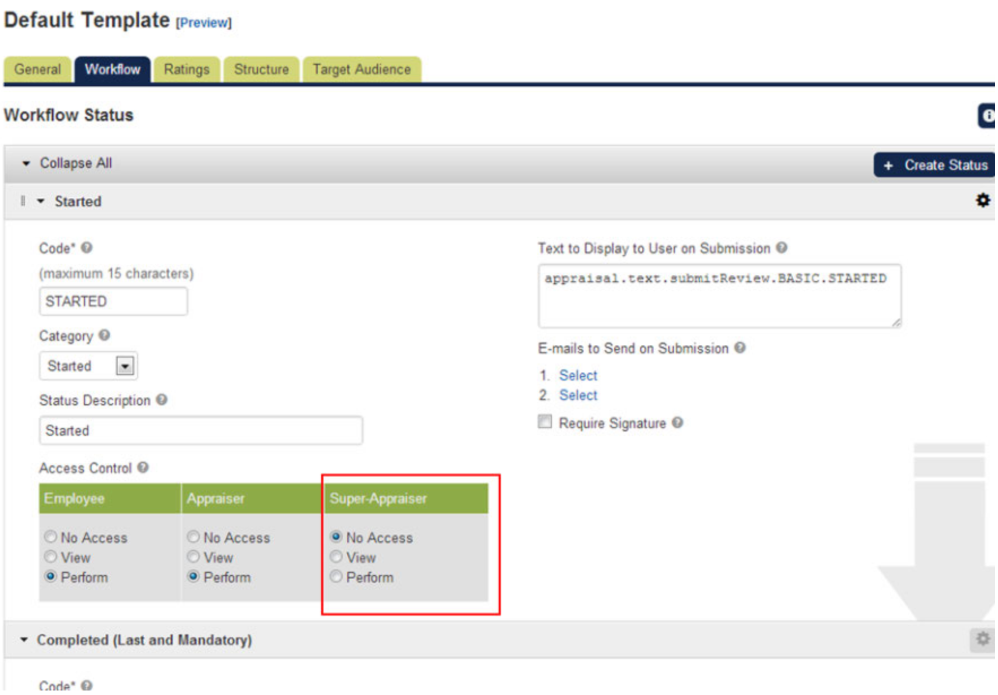


Also, when there are more than 10 users are selected, only 10 user tokens are displayed in the user selector box, and the "show all" button is displayed.

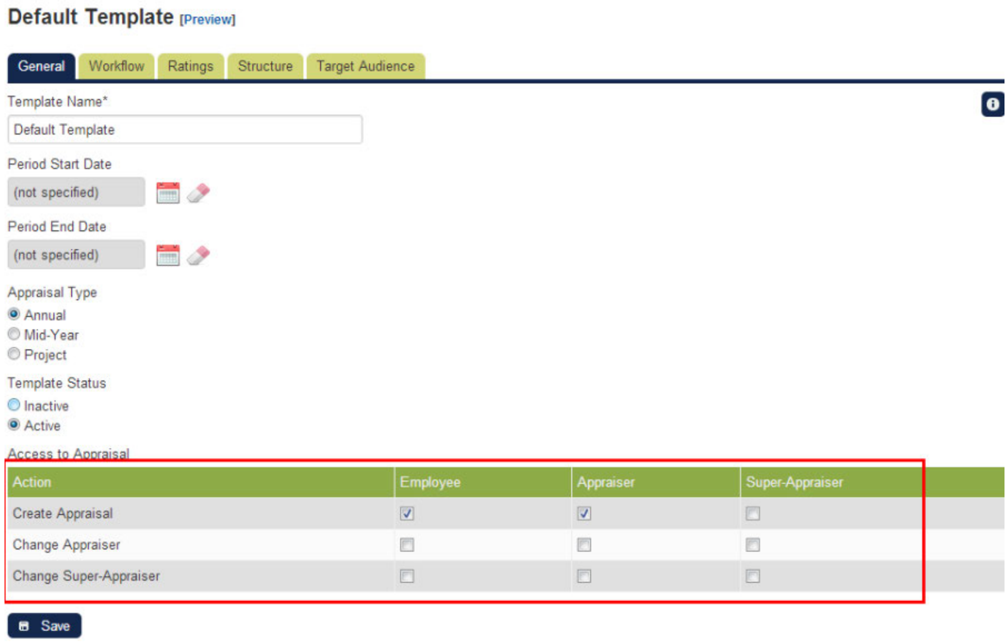
Note that the number of selected users is shown on the above the right-hand side of the quick search box. Clicking the "show all" button will display all the user selected within the user selector box.

Super-Appraisers

The role, Super-Appraiser is used to cater for workflows where the appraisal needs to be counter-signed by someone other than the appraisee or appraiser.

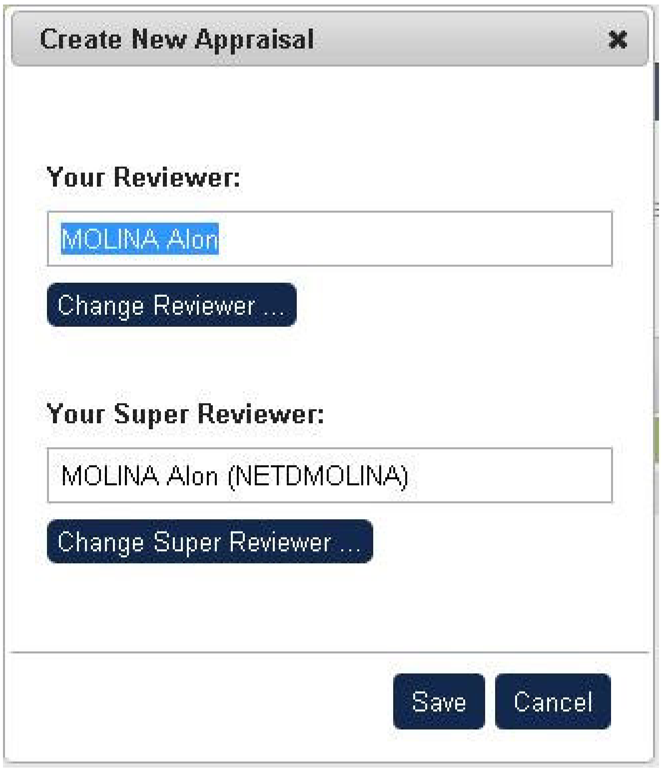


By default, only Appraisal Administrators can change an appraisee's appraiser or super-appraiser but those involved in the appraisal can be granted permission to do the same under the General tab.



Involving a Super-Appraiser

If Super-Appraiser is involved in the workflow of the appraisal, his/her name will be shown on the appraisal landing page as well as the appraisal printed version.



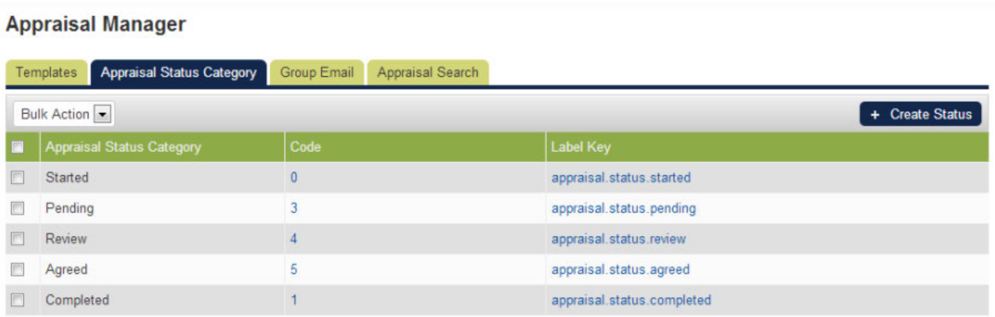
Selecting a Super-Appraiser

With appropriate permissions and configuration, any user (except the appraisee) of the system can be selected to play the role of "Super-Appraiser" via the appraisee's landing page under **Career Development > Performance Review**. As counter-signing is typically done by the appraiser's appraiser, the default Super-Appraiser prior to starting a new appraisal is the Direct Appraiser of the Direct Appraiser according to system records.

Appraisal Status Categories

With different workflows for different templates, reporting can become difficult if data across multiple appraisal templates is required. Appraisal Status Categories can link statuses in any template such that you can, for example, search for all appraisals currently in a status that is in the "Review" status category.

The Appraisal Status Categories can be accessed via **Manage Center > Talent > Appraisal Manager > Appraisal Status Categories**.



An Appraisal Status Category will have a code that consists of any string up to a maximum of 15 characters. It can optionally have a label or label key (max 100 characters).
See Configurable Appraisal Workflow for information on where appraisal statuses can be assigned a category.

Appraisal Columns

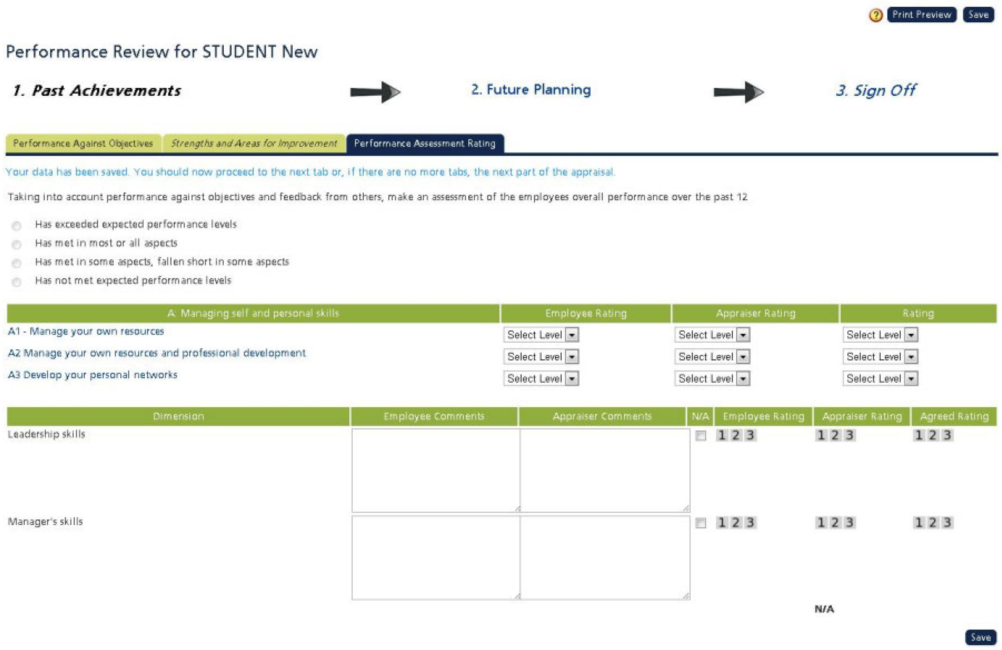
Past Competencies, Past Achievements, Future Objectives, Career Development and Single Choice sections involve user data entry through fields displayed in a table. The columns that are included in such tables are configurable on a section-by-section basis.

- Where the label key is user definable, administrators may use any heading text (or bundle key) that best suits their purpose for the field.
- Where Allow Copy is available, using copy keys as described previously can allow users to flag entries for copying and then copy them across to the linked Future Objectives section at the click of a button.

Column	Field Type	Appraisal Dimensions	Past Achievements	Past Competencies	Future Objectives	Career Development	Single Choice	Label Key
Objectives	Text Area		Mandatory		Mandatory	Mandatory		User defined
Target Date	Date Selector							User defined
How	Text Area							User defined
Details	Text Area							User defined
Measure	Text Area							User defined
Appraisee Rating	Rating Scale							appraisal.heading.appraiseeRating
Appraiser Rating	Rating Scale							appraisal.heading.appraiserRating
Agreed Rating	Rating Scale							appraisal.heading.agreedRating
Allow Copy	Check Box							User defined
Appraisee Comments	Text Area							heading.appraisal.appraiseeComments
Appraiser Comments	Text Area							heading.appraisal.appraiserComments

Appraisal Missing Required Fields Flagging

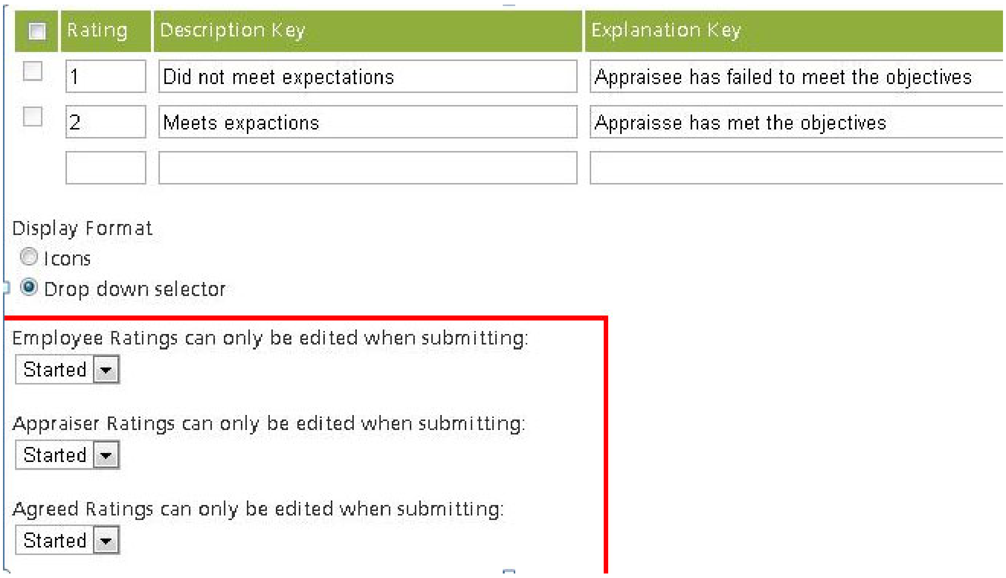
Ratings and Single Choice selections (amongst other fields) are checked for when a performer attempts to submit an appraisal. The example below indicates incomplete fields by using: italics for parts, italics for tabs, a red message, and red asterisks:



The appearance of these indicators can be customized in the skin using the following class names:

Label	CSS Class Names
Selected Part	appraisal-part-selected
Completed Part	appraisal-part-completed
Incomplete Part	appraisal-part
Completed Page (Tab)	completed-appraisal-tab
Incomplete Page (Tab)	incomplete-appraisal-tab
Page Complete Message	appraisal-message
Page Incomplete Message	appraisal-warning
Incomplete Asterisk	appraisal-warning

Depending on whether the appraisal is appraisee or appraiser driven and the number of steps in the workflow, the status at which the rating or single choice selection is expected to be made will vary from template to template. In order for the system to execute the appropriate checks at submission then, it is therefore necessary to specify at which status the rating or selection should be completed. For ratings, this is configured in the Ratings tab.



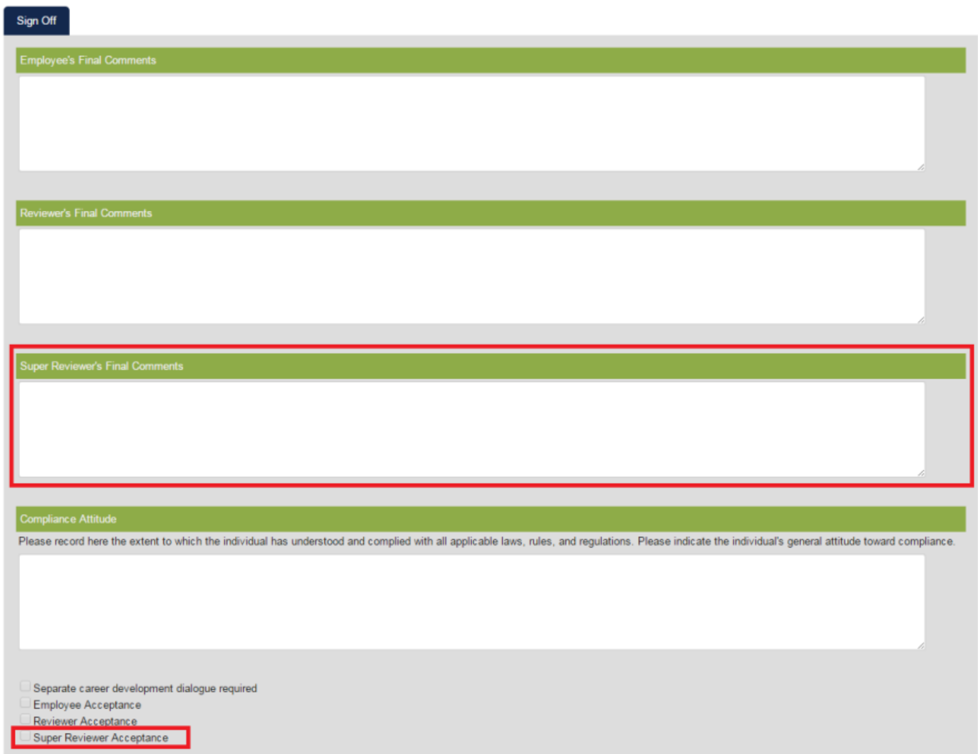
For Single Choice sections, this is configured in the section itself.

Super Reviewer Signing Off Appraisal

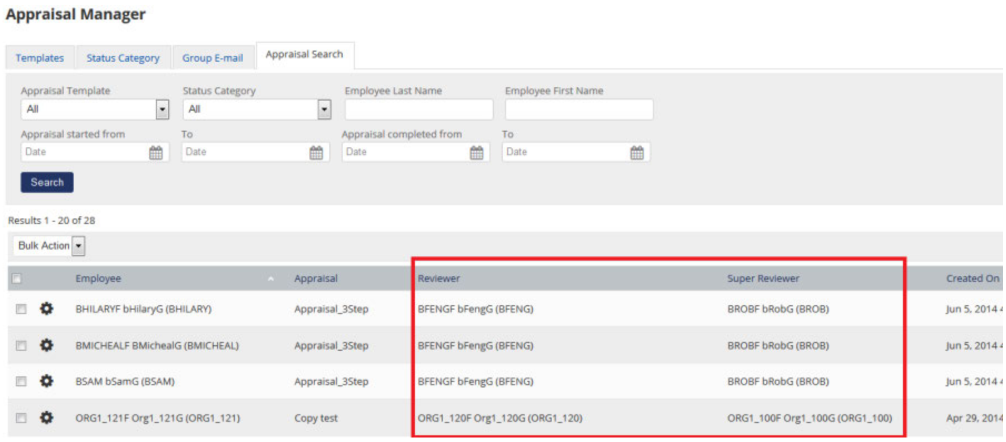
Adding Super Reviewer to the Sign Off Process

It's common for an appraisal to require a third party, like the HR department or the department head, to sign off on it beside the involved manager and direct report, especially if it concerns renumeration changes based on the review process.

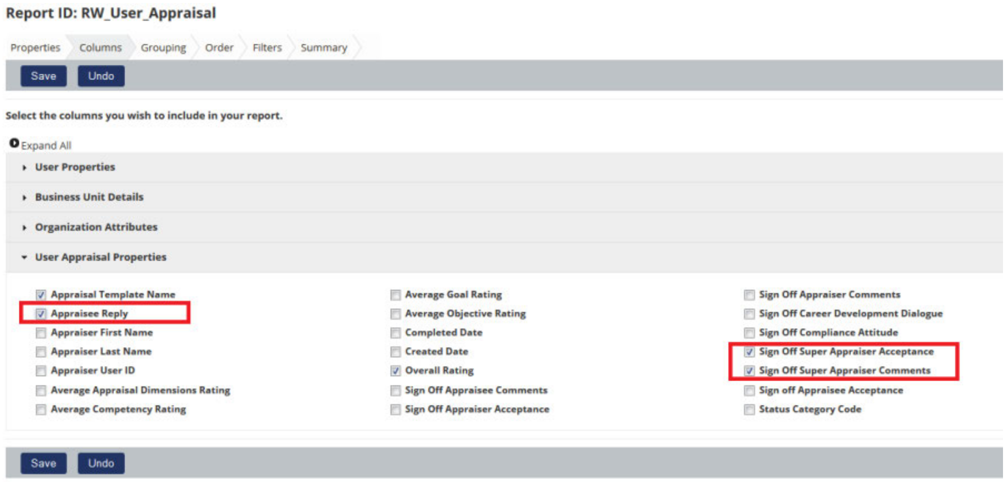
In the Sign Off section, it's possible to enable Super Reviewer Acceptance checkbox as well as the Final Comments field for the appraisal.



With the super reviewer being able to sign off an appraisal, it adds value to show who is the super reviewer in the administrative appraisal search screen.

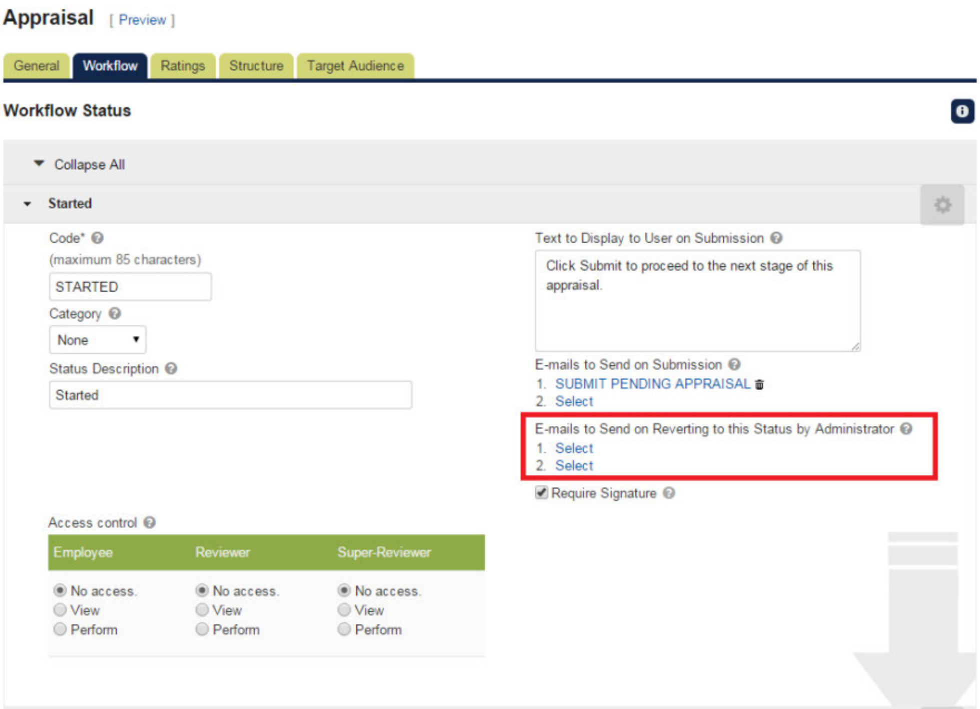


Also, appraisal reporting in the Report Wizard supports the new Acceptance and Final Comments fields by the super reviewer as well as the Appraisee Right to Reply comment for reporting.



Manual Appraisal Status Change Notification

Email templates can be set up for the scenario of an administrator manually changes an appraisal status. On the particular status that the appraisal gets changed to, if it's been configured with a notification email then the concerned users would be receiving an email about the status change.



Performance Appraisals

Appraisal fields can be set to Mandatory/Optional in an appraisal template. Now it would be possible to turn a field on but specify that filling it in is optional.

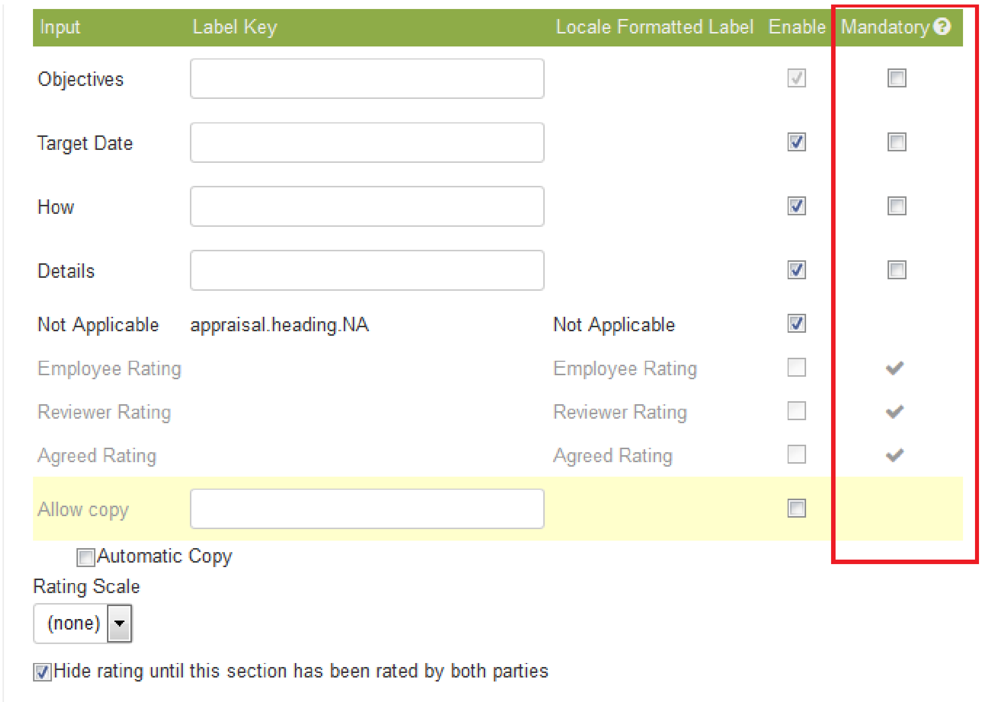
Specifying Fields as Optional in Appraisals

The new "Mandatory" configuration is added per field. The configuration is active depending on whether or not the field itself has been enabled. When Not Applicable has been enabled, users who have checked the Not Applicable checkbox will not be required to fill out the field even if it has been configured as Mandatory.

The list of fields with Mandatory/Optional configuration added:

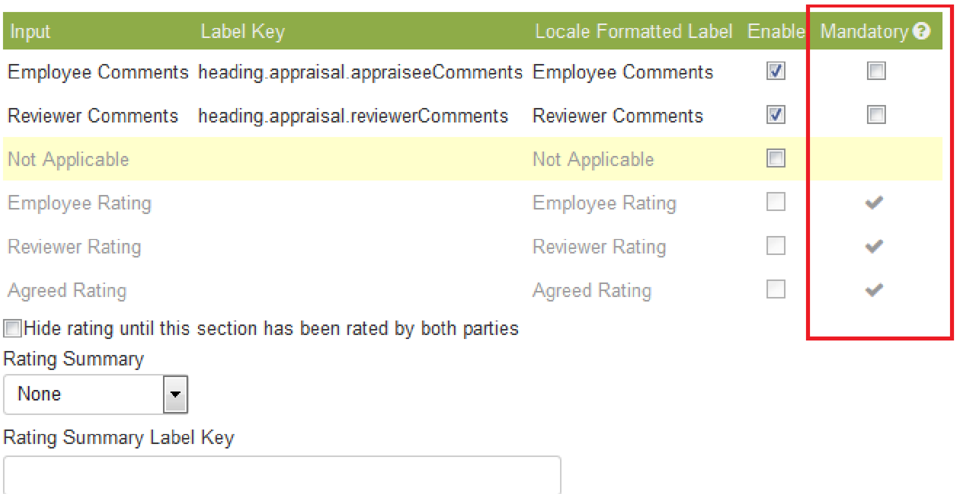
PAST ACHIEVEMENTS

- (Objectives)
- Target Date
- How
- Details



APPRAISAL_DIMENSIONS

- Employee Comments
- Reviewer Comments



PAST_COMPETENCY

- Employee Comments
- Reviewer Comments
- Need to add a Rating N/A

Input	Label Key	Locale Formatted Label	Enable	Mandatory
Employee Comments	heading.appraisal.appraiseeComments	Employee Comments	☑	☐
Reviewer Comments	heading.appraisal.reviewerComments	Reviewer Comments	☑	☐
Not Applicable	appraisal.heading.NA	Not Applicable	☑	
Employee Rating	appraisal.heading.appraiseeRating	Employee Rating	☑	✔
Reviewer Rating	appraisal.heading.reviewerRating	Reviewer Rating	☑	✔
Agreed Rating	appraisal.heading.agreedRating	Agreed Rating	☑	✔
Allow copy			☐	

Rating Summary

None

CAREER_DEVELOPMENT

- (Objectives)
- How
- Details
- Measure
- Target Date

Input	Label Key	Locale Formatted Label	Enable	Mandatory
Objectives			☑	☐
How			☑	☐
Details			☑	☐
Measure			☑	☐
Target Date			☑	☐

Career Development Intervals

FREE_TEXT

- Input

Input Type	Mandatory
Text Field	☐

☐ Allow copy

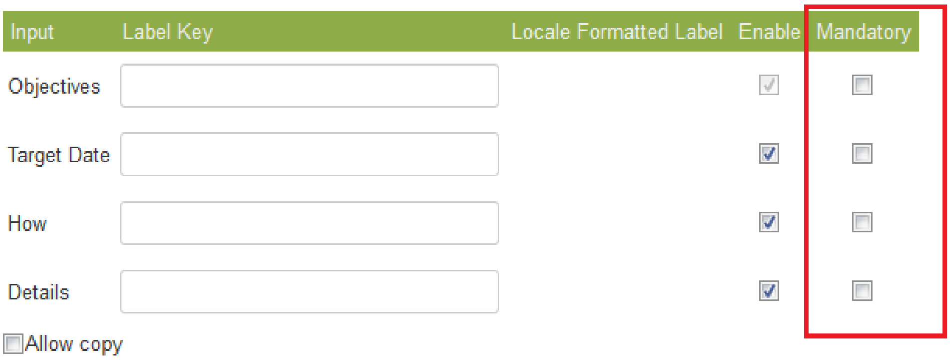
LEARNING_PATH

None

FUTURE_OBJECTIVES

- (Objectives)

- Target Date
- How
- Details



RATING_SUMMARY
None

SINGLE_CHOICE

- Input

TRAINING_HISTORY
None

SIGN_OFF

- Employee Comments
- Reviewer Comments
- Super Reviewer Comments
- Employee Acceptance
- Reviewer Acceptance
- Super Reviewer Acceptance
- Compliance Attitude
- Career Development Dialogue

Display field	Enable	Mandatory
Display employee comments	☑	☐
Display reviewer comments	☑	☐
Display super reviewer comments	☐	
Display employee acceptance	☑	☐
Display reviewer acceptance	☑	☐
Display super reviewer acceptance	☐	
Display compliance attitude	☑	☐
Display career development dialogue	☑	☐
Display right-to-reply (will be displayed on a separate page)	☐	✓

RIGHT_TO_REPLY
None

PROBATIONARY_SIGN_OFF
None

GOAL_RESULTS

- Employee Comments
- Reviewer Comments

Input	Label Key	Locale Formatted Label	Enable	Mandatory
Employee Comments	heading.appraisal.appraiseeComments	Employee Comments	☑	☐
Reviewer Comments	heading.appraisal.reviewerComments	Reviewer Comments	☑	☐
Employee Rating		Employee Rating	☐	✓
Reviewer Rating		Reviewer Rating	☐	✓
Agreed Rating		Agreed Rating	☐	✓

☐ Hide rating until this section has been rated by both parties

Rating Summary

None

Rating Summary Label Key

PERFORMANCE_GOAL_PLAN
None

DEVELOPMENT_GOAL_PLAN
None

SUCCESSION_PLANNING
None

After the setup of the appraisal, the appraisal fields generated will be based on the configuration. This affects the validation on clicking save and attempting to submit appraisal.