



PeopleFluent Learning

21.04

# Team Review Guide

An overview of the features and procedures relevant to Team Review in  
PeopleFluent Learning 21.04

## Document Information

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## Introduction

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

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

# Review

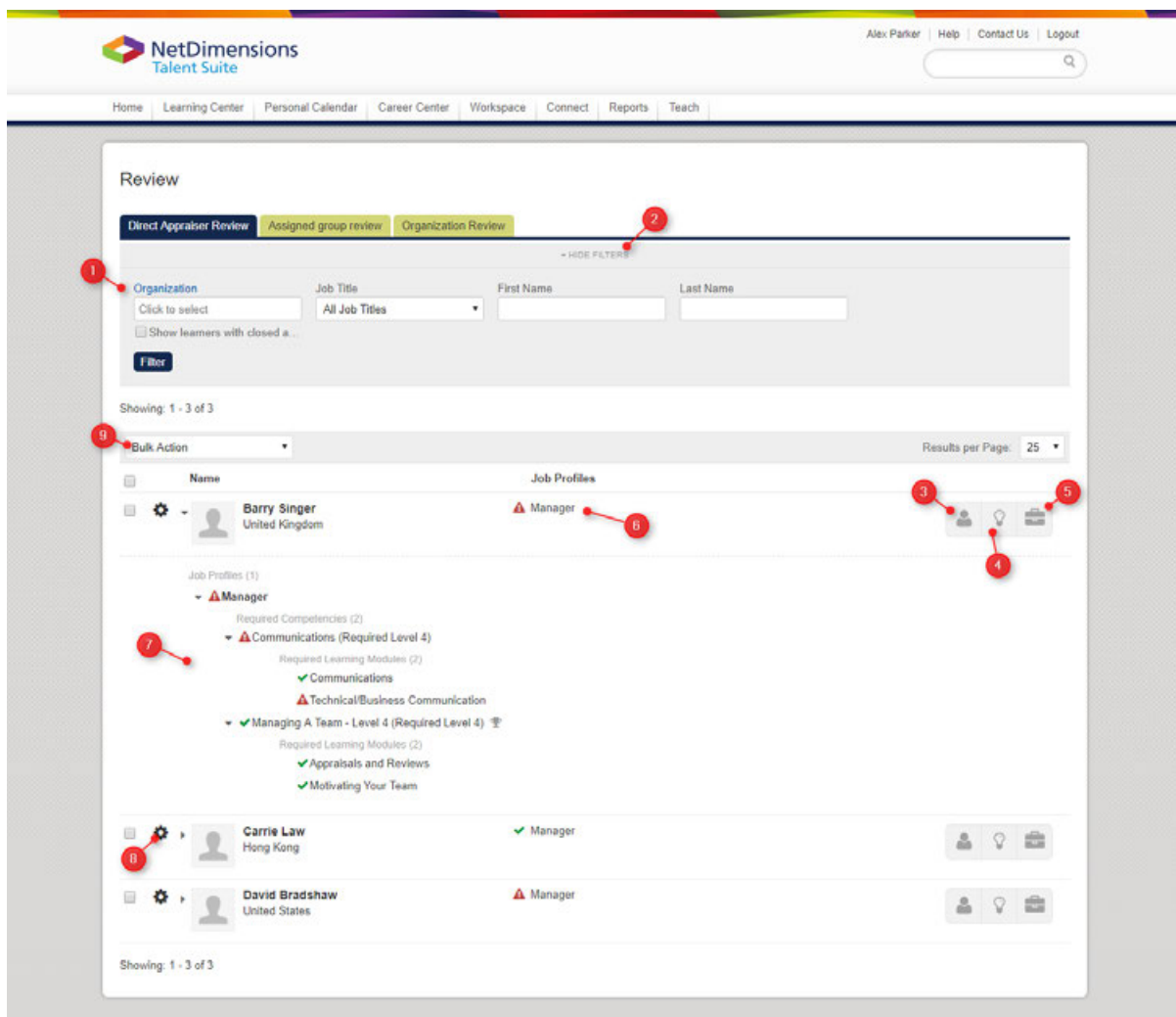
(Available for Performance, Learning, and eLearning only)

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

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

From these screens, you can

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



## Actions for Individuals

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

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

## Bulk Actions

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

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

## Job Profile, Competency, and Training Statuses

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

### Review

The screenshot displays the 'Review' section for an individual named John Macomber. The interface features three tabs: 'Direct Appraiser Review', 'Assigned Group Review', and 'Organization Review'. A 'Bulk Action' dropdown menu is located at the top left. The main content area shows a tree view of 'Job Profiles' for 'Product Management'. Under 'Required Competencies (3)', three items are listed:

- 1. Programme management - Level 7 (Required Level 7) - Indicated as 'in the grace period' (yellow callout).
- 2. Programming/software development - Level 4 (Required Level 5) - Indicated as 'not completed' (red callout).
- 3. Quality management - Level 7 (Required Level 5) - Indicated as 'completed' (green callout).

Each competency item also lists its 'Required Learning Modules':


- Under 'Programme management': Design Pattern (Grace Period), Project Management.
- Under 'Programming/software development': Java Programming.
- Under 'Quality management': HTML, JQuery.

 **Complete indicator**

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

 **Incomplete indicator**

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

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

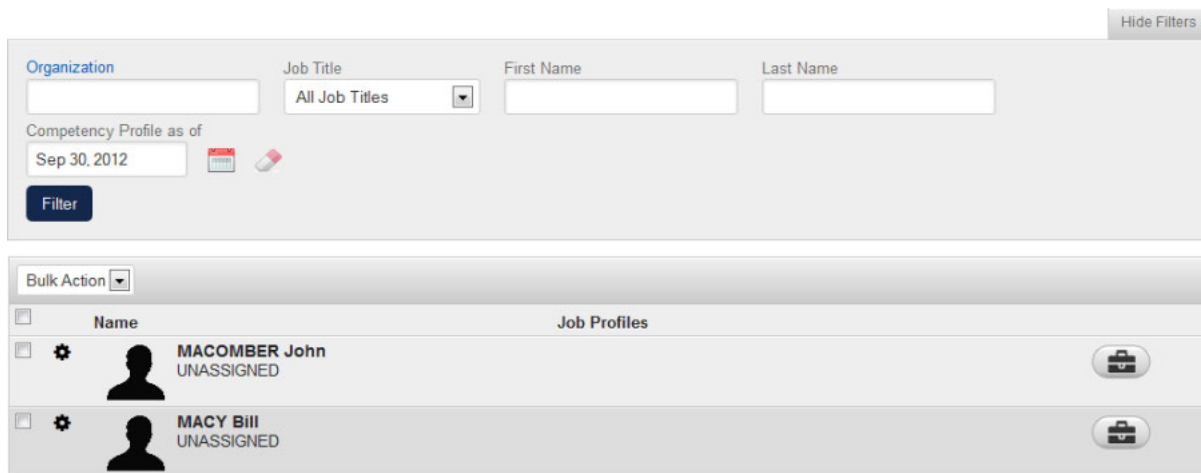
- Learning module: if the new released revision of the learning module is not completed, the learning module will be indicated as in the grace period.
- Competency: if all the required modules are completed but one of the required modules has a new revision released, the competency will be indicated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

### Competency Profile as of

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

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

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



The screenshot shows a user interface for filtering competency profiles. At the top right is a "Hide Filters" button. The filter section includes:
 

- Organization: [Empty text box]
- Job Title: [All Job Titles dropdown]
- First Name: [Empty text box]
- Last Name: [Empty text box]
- Competency Profile as of: [Sep 30, 2012 date selector]
- [Filter button]

 Below the filter is a table with a "Bulk Action" dropdown. The table has two columns: "Name" and "Job Profiles".
 

Name	Job Profiles
MACOMBER John UNASSIGNED	[Briefcase icon]
MACY Bill UNASSIGNED	[Briefcase icon]

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

Organization: [ ] Job Title: All Job Titles [v] First Name: [ ] Last Name: [ ]

Competency Profile as of: Oct 21, 2012 [ ] [ ] [ ]

Filter

Bulk Action [v]

Name	Job Profiles
MACOMBER John UNASSIGNED	Product Management
MACY Bill UNASSIGNED	Database Administrator Software Engineer

Job Profiles (2)

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

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

Organization: [ ] Job Title: All Job Titles [v] First Name: [ ] Last Name: [ ]

Competency Profile as of: Oct 22, 2012 [ ] [ ] [ ]

Filter

Bulk Action [v]

Name	Job Profiles
MACOMBER John UNASSIGNED	Product Management
MACY Bill UNASSIGNED	Database Administrator Software Engineer

Job Profiles (2)

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

## Enrollment Requests History

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



### Enrollment Requests History

Overall Status

- All
- Approval Denied
- Approved
- Pending Approval
- Waitlisted

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

[Back](#)

### Assigning Competency

(Available for Performance and Learning only)

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

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

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

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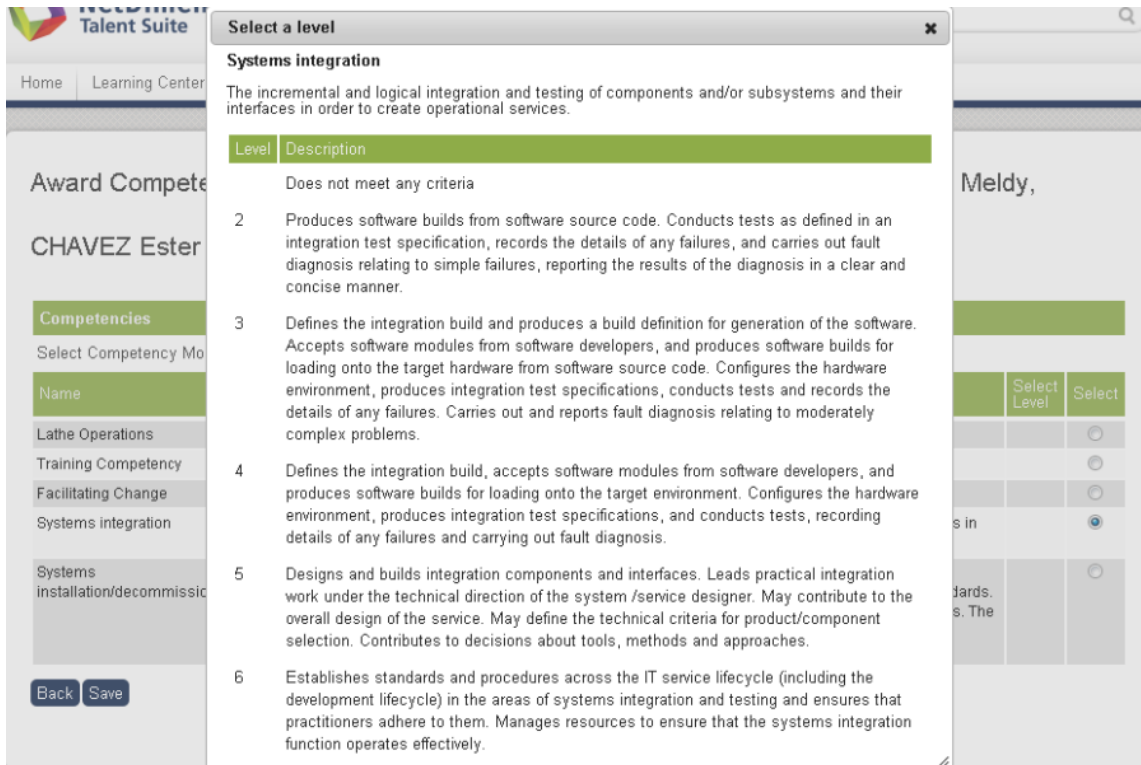
Award Competencies for STUDENT New, DELEON Henry, CRUZ John, YODICO Meldy, CHAVEZ Ester

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

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

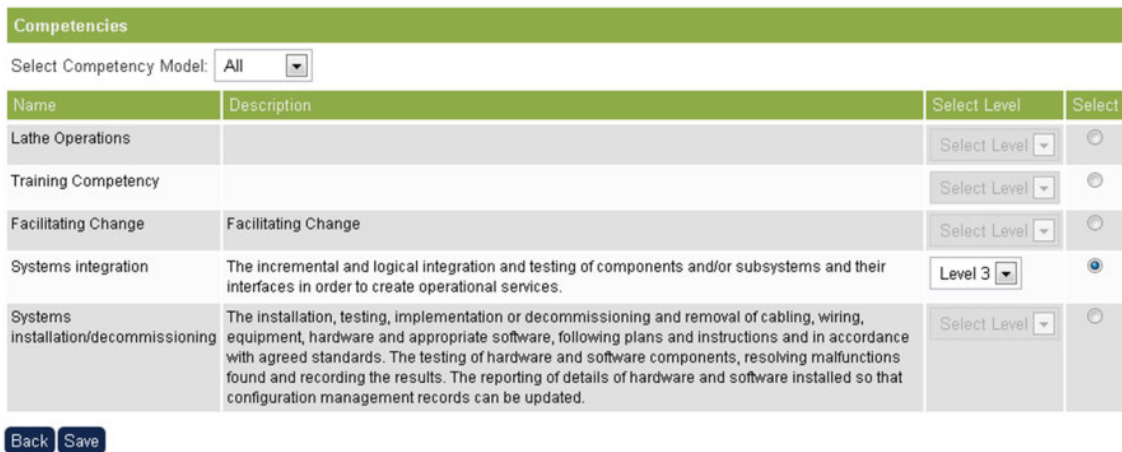
2. From here, select the competency you to want assign to the selected participants. You have an option to select the competency model you want to display by clicking the *Select Competency Model* drop down button. To select, tick the radio button ( located on the last column of the table) of the competency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

3. Select the **Level** by pointing to the level number of level description. Once level is selected, the menu will be closed and display the selected



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

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



## 9-box Reports

(Available for Performance only)

Effective succession planning should take into account both the work performance and promotion potential of employees. The *9-box Report* is designed to provide a visual representation of these two

different measures, revealing the suitability of a set of employees for more senior roles. It aims to help managers make more informed succession decisions and identify high potential performers for future promotions.

The 9-Box Report only plots the selected employees who have completed an appraisal with both performance and potential scores. If an employee has completed multiple appraisals before, only the latest one will be retrieved for analysis, regardless of the appraisal template.

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

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

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

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

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

### Plot 9-Box Promotion Potential Report

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

#### Review

The screenshot shows a web interface for reviewing participants. At the top, there are three tabs: "Direct Appraiser Review" (selected), "Assigned Group Review", and "Organization Review". Below the tabs is a "Show Filters" button. A "Bulk Action" dropdown menu is visible, and "Results per page" is set to 25. The main content is a table with the following data:

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

Showing: 1 - 5 of 5

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

## Review

Direct Appraiser Review | **Assigned group review** | Organization Review

Show filters

Results per Page: 25

**Bulk Action**

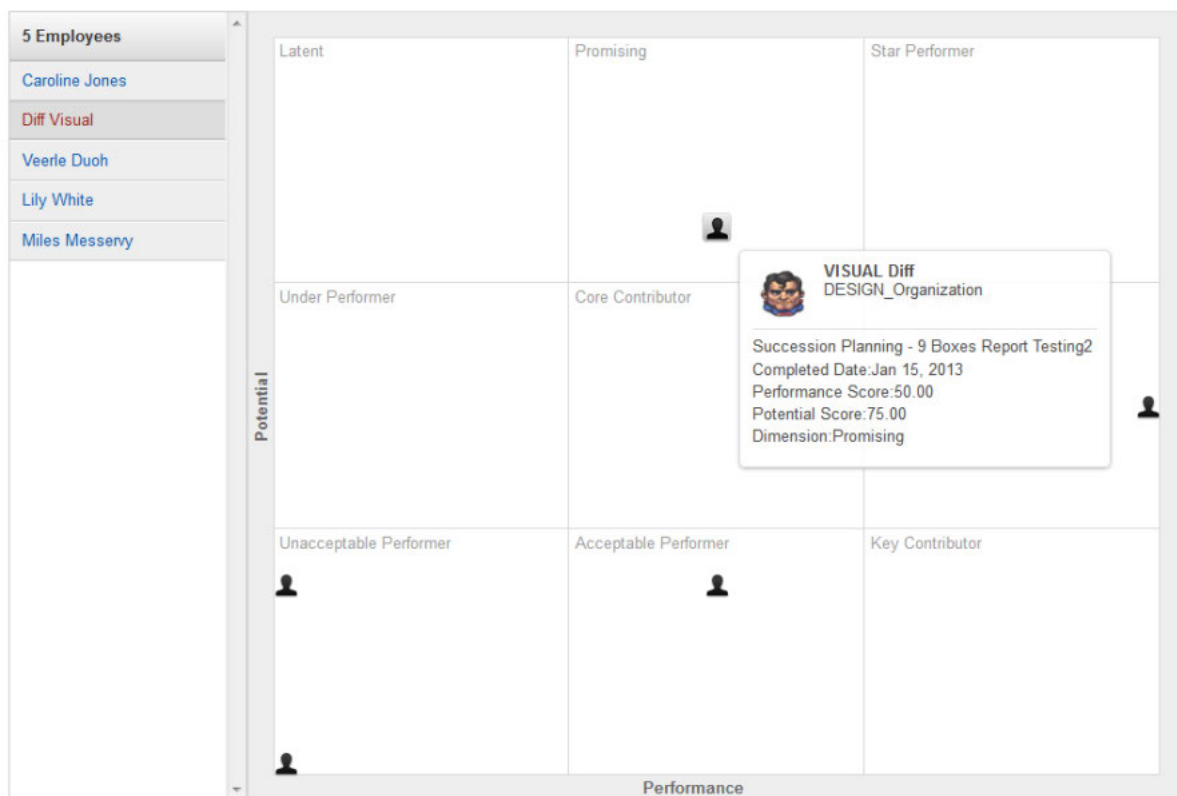
- Deploy Assessment
- Assign goal
- Assign competency
- Plot 9-box Promotion Potential Report
- Plot 9-box Retention Risk Report
- Enrollment Requests History

Job Profiles	
✓ New Job Profile1	
✓ New Job Profile1	

Showing: 1 - 2 of 2

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

### 9-Box Report



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

Optionally filter the results using the following criteria:

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


### 9-Box Promotion Potential Report

Appraisal Template: **Nine Box Report - Potential** | Number of Appraisals: **Latest Appraisal**

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

0 Employees

Latent	Promising	Star Performer
--------	-----------	----------------




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

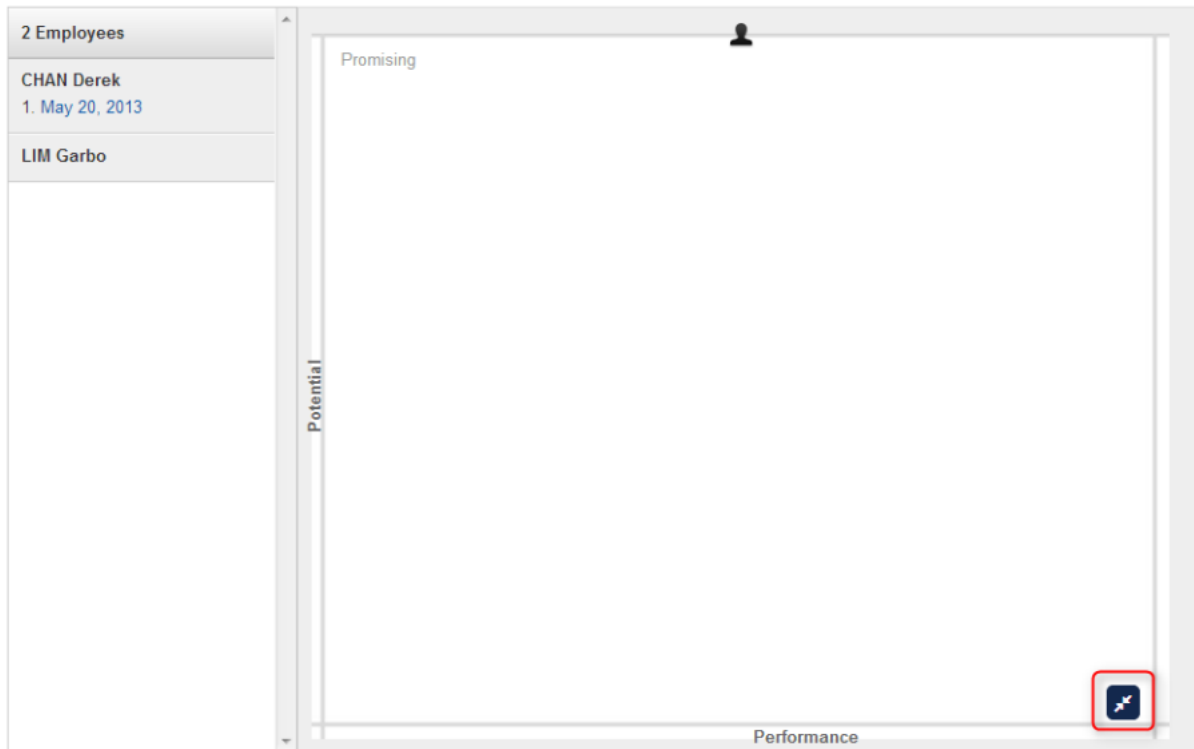
2 Employees

CHAN Derek  
1. May 20, 2013

LIM Garbo  
1. May 20, 2013

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





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

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

**NetDimensions® Talent Suite**

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

**Review**

Direct Appraiser Review | Assigned group review | Organization Review

Bulk Action	Job Profiles
<ul style="list-style-type: none"> <li>Bulk Action</li> <li>Deploy Assessment</li> <li>Assign goal</li> <li>Assign competency</li> <li>Plot 9-box Promotion Potential Report</li> <li><b>Plot 9-box Retention Risk Report</b></li> <li>Enrollment Requests History</li> </ul>	<ul style="list-style-type: none"> <li>UNASSIGNED</li> <li>UNASSIGNED</li> </ul>
<ul style="list-style-type: none"> <li>UNASSIGNED</li> <li><b>TWO User</b></li> <li>UNASSIGNED</li> </ul>	<ul style="list-style-type: none"> <li>✓ Job Profile Two</li> <li>✓ Job Profile One</li> <li>▲ Job Profile Two</li> <li>▲ Job Profile One</li> </ul>

Showing: 1 - 3 of 3

# Supervisor Assessments

(Available for Performance and Learning only)

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

**Supervisor Assessments**

Participant Name/ID: Search for a user  
 Assessment Status: All  
 Learning Status: Active

Filter Reset

Showing: 1 - 10 of 24

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

Showing: 1 - 10 of 24

**Supervisor Assessments in Assessment Workflows**

Participant Name/ID: Search for a user  
 Assessment Status: Incomplete  
 Learning Status: All

Filter Reset

Showing: 0 - 0 of 0

Participant Module Name Assigned assessment Assessment Status

There is no assessment for you to carry out.

Showing: 0 - 0 of 0

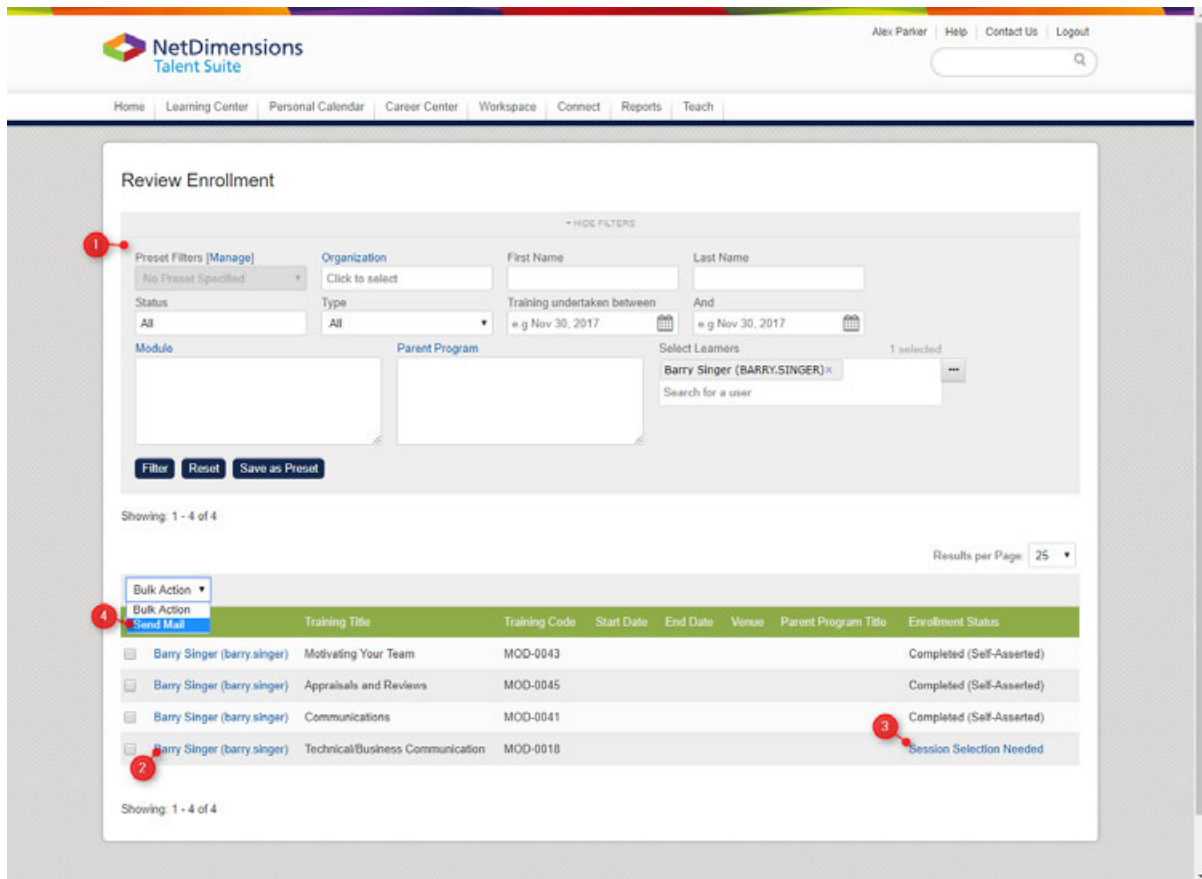
NetDimensions

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

# Review Enrollments

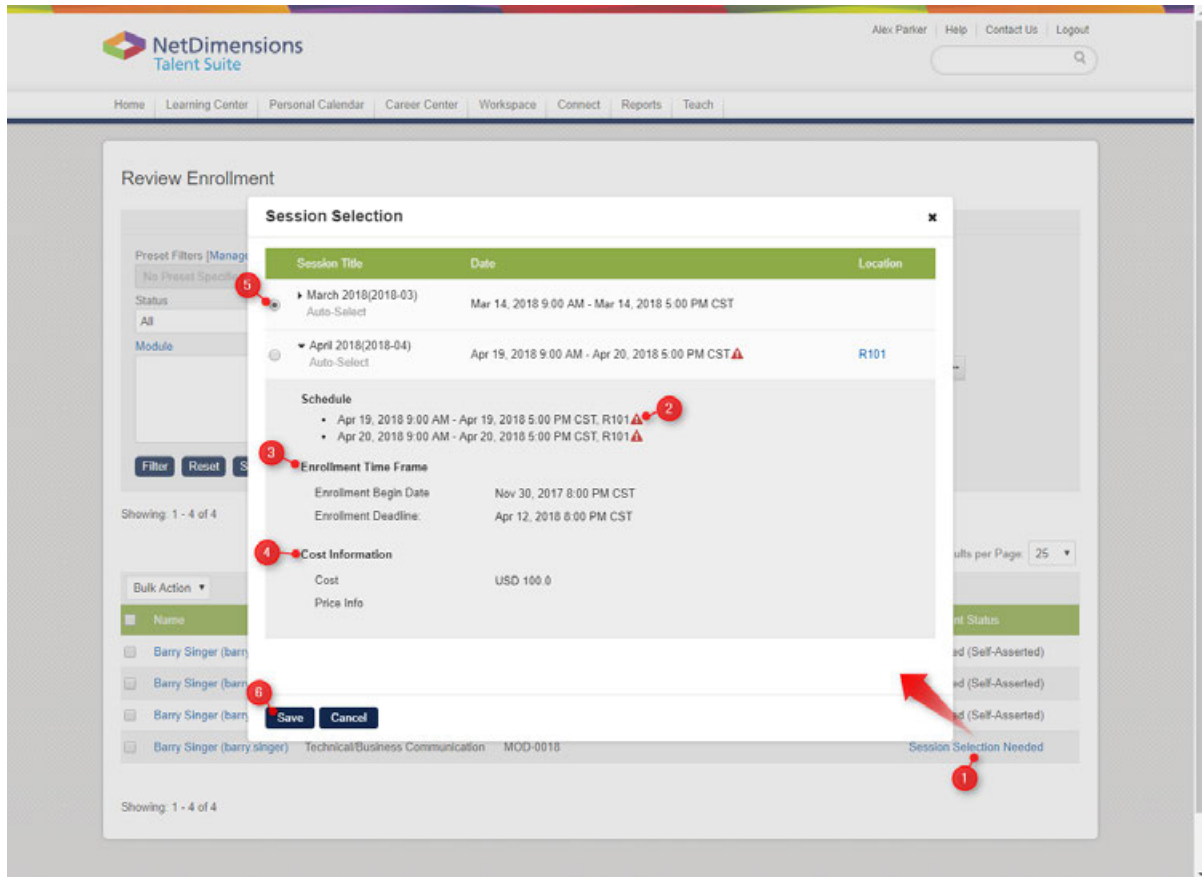
At Workspace > Review Enrollments, you can review transcripts across your teams. From this screen you can:

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





## Selecting Sessions



To select a session for a learner

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

# Competency Assessments

(Available for Performance only)

## Deploying Competency Assessments

To deploy an assessment:

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

### Competency Assessment Wizard

Assessment Template Reviewers

Available Templates

Assessment Template 1

Assessment Template 1

Next Cancel

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

### Competency Assessment Wizard

Assessment Template Reviewers Competencies

Primary Reviewer

MOLINA Alon (NETDALON) [Change](#)

Due:  30 Days from Assignment

Date: (not specified)

Weight ratio:

Self Review

Allow Self Review

Due:  30 Days from Assignment

Date: (not specified)

Weight ratio:

Employee

[Select All](#)

SANTOS Vina (EMPNC005)

Secondary Reviewers

Peer Subordinate Manager

Number of Reviewers: 1

Due:  30 Days from Assignment

Date: (not specified)

Weight ratio:

0 selected

Search for a user

Back Next Cancel

- If users want to add a secondary reviewer, click the **Add Reviewers** link, then click **Next**

Secondary Reviewers

Peer
Subordinate
Manager

Number of Reviewers: 1

Due:

30 Days from Assignment

Date: (not specified)

Weight ratio:

1 selected

STUDENT New (EMPNO003) x
...

Search for a user

- On this screen, you can review the list of reviewers and reviewees. For secondary reviewers they cannot be the same person as the primary reviewer. In addition to this, the number of secondary reviewers must be the same number specified in the assessment template. Users can also switch between horizontal arrangement and vertical arrangement for the search result box and the selection box. The switch link is located at the top-right-hand corner of the two boxes.

**User Selector**
✕

User ID <input style="width: 90%;" type="text"/>	First Name <input style="width: 90%;" type="text"/>	Last Name <input style="width: 90%;" type="text"/>
Role <input style="width: 90%;" type="text" value="All"/>	Organization <input style="width: 90%;" type="text"/>	User Group <input style="width: 90%;" type="text"/>

Specify Additional Attributes
 UserID Direct Entry Form

Search
Reset

Results: 0 Vertical View

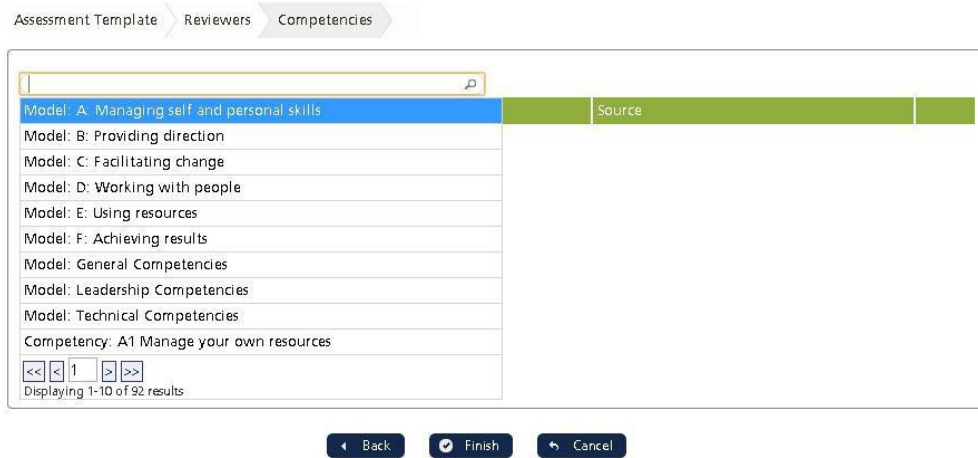
⏴ ⏵ ⏶ ⏷

Selected: 0

OK
Cancel

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

### Competency Assessment Wizard

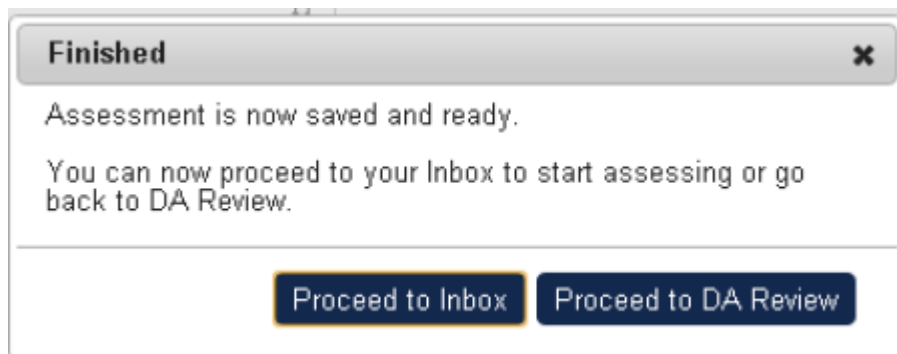


8. The screen refreshes back to the **Competencies** tab, which now lists the competencies on the screen. You can remove the competency that you don't want to be part of your assessment by clicking the remove button located at the end of the column.

### Competency Assessment Wizard



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

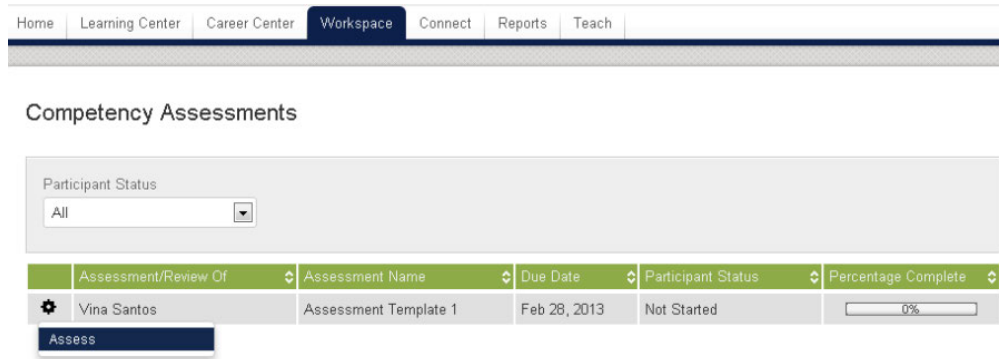


10. Select **Proceed to DA Review** to proceed with the review, otherwise select **Proceed to Inbox** to lead you back to the **Competency Assessment** screen.

## Completing a Competency Assessment

To assess the learner's competency,

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



3. This leads you to *Competency Assessment* page. This displays the details about the reviewee, description about the assessment template, and instruction (if specified) on how to execute the assessment template. To assess one competency, the reviewer can select the proficiency level and state the evidence.

### Competency Assessment

**Employee Details**

Name: SANTOS Vina      Job Title:      Join Date: Unknown  
Assigned Job Profiles:      Direct Appraiser: MOLINA Alon

**Description**

Assessment Template 1

**Instructions**

Assessment Template 1

**Competencies**

Stand-alone Competencies

Competency	VinaEmployee's Level	Evidence
Java	Select Level	

**Overall Comments**

Save    Finish    Close

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

**Select a level** ✕

**A3 Develop your personal networks**

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

**Behavior**

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

**Outcomes**

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

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

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

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

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

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



## Competency Assessments

Participant Status					
All					
Assessment/Review Of	Assessment Name	Due Date	Participant Status	Percentage Complete	
Vina Santos	Assessment Template 1	Feb 28, 2013	Finished	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	

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

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

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

## Secondary Reviewers Selection by Employees

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

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

### Competency Assessment Wizard

Assessment Template > Reviewers > Competencies >

**Primary Reviewer**

MOLINA Alon (NETDALON) [Change](#)

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

Weight ratio:

**Self Review**

Allow Self Review

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

Weight ratio:

**Reviewee**

STUDENT New (EMPNO003)

**Secondary Reviewers**

Peers Subordinates

---

Number of Reviewers: 3

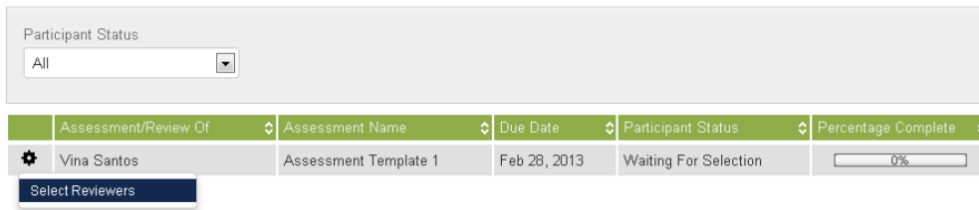
Due:  30 Days from Assignment  
 Date: (not specified)

Weight ratio:

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

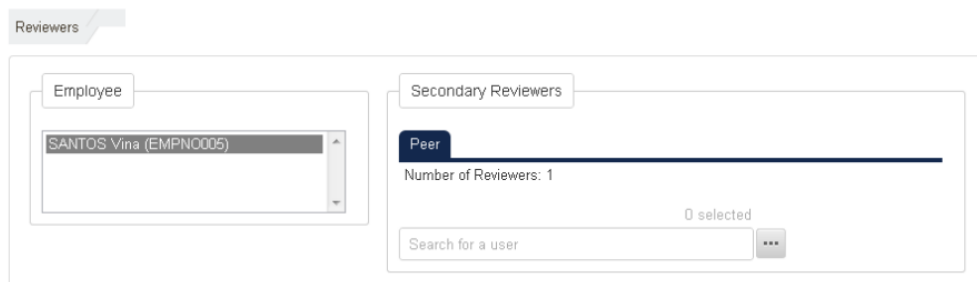
This is because the Reviewee is allowed to select the Secondary Reviewers by clicking **"Select Reviewers"** button from **Review > Competency Assessments** screen.

Competency Assessments



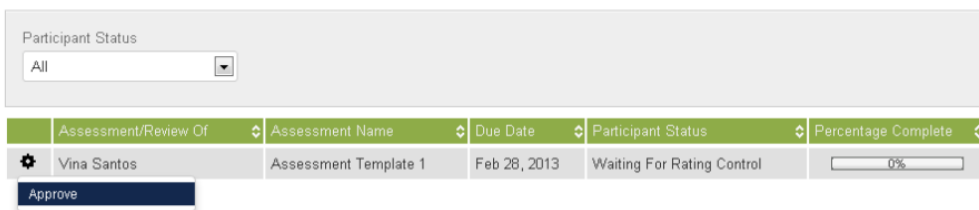
The selection process is very similar to the deployment screen where the Reviewee is required to select the required number of Secondary Reviewers from a list.

Select Secondary Reviewers



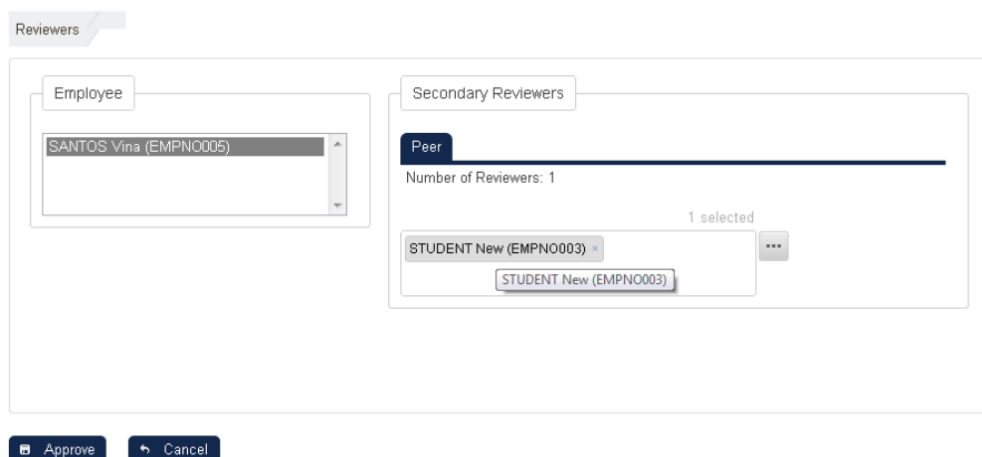
Once the Secondary Reviewers have been chosen, the Primary Reviewer will see an **"Approve"** button from the **Review > Competency Assessments** screen.

Competency Assessments



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

Approve Secondary Reviewers



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



to start the Competency Assessment.

**Note:**

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

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

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

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

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

## Competency Assessment

**Reviewee Details**

Name: STUDENT 4 New4      Job Title:      Join Date: Unknown  
 Assigned Job Profiles:      Direct Appraiser: MOLINA Alon

**Reviewer Details**

Primary: MOLINA Alon  
 Peers: Anonymous User(s)  
 Subordinates: Anonymous User(s)

**Description**

**Ad hoc Competencies**

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

Reviewer	Reviewer Type	Rating	Evidence
Anonymous User	Peers	Hidden	Hidden by assessment setting
Anonymous User	Subordinates	Hidden	Hidden by assessment setting
STUDENT 4 New4	Reviewee	2.0	sample
MOLINA Alon	Primary	Select Level <input type="text"/>	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

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

Reviewer	Reviewer Type	Rating	Evidence
Anonymous User	Peers	Hidden	Hidden by assessment setting
Anonymous User	Subordinates	Hidden	Hidden by assessment setting
STUDENT 4 New4	Reviewee	1.0	sample
MOLINA Alon	Primary	Select Level <input type="text"/>	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

**Overall Comments**

Reviewer	Comment
MOLINA Alon	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
Anonymous User	Hidden by assessment setting
Anonymous User	Hidden by assessment setting
STUDENT 4 New4	sample

**Training Plan**

Auto Suggest Training Plan

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

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

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

## Allowing Secondary Reviewers to Finish Partial Assessments

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

## Sign-off the Competency Assessment

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

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

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

### Competency Assessments

Participant Status  
All

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

Sign Off

Strengths

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

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

Weaknesses

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

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

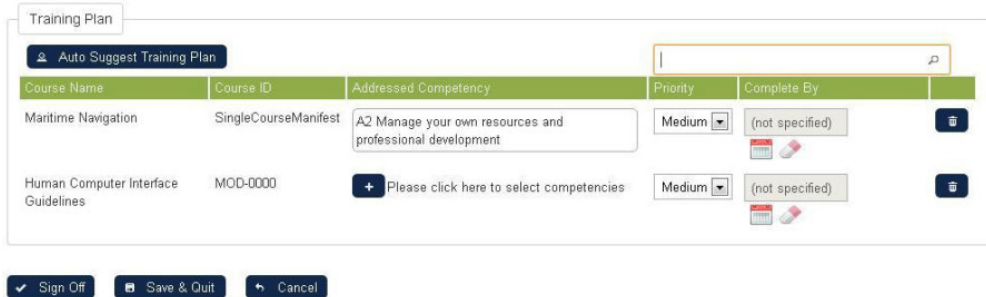
Apart from the comments/evidences for each competency, the final reviewer can also provide his/her overall comments about the appraisee.

Overall Comments

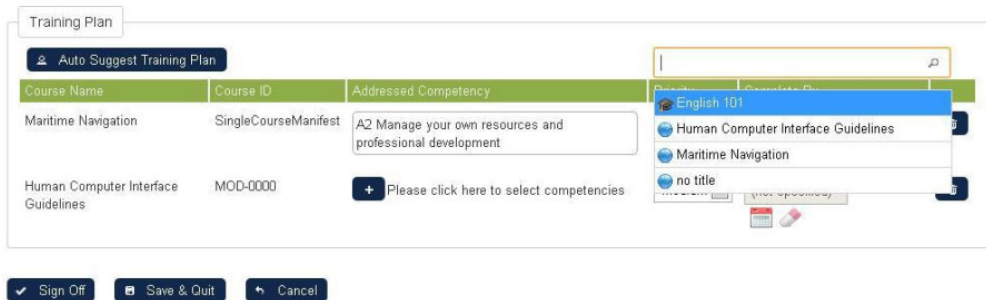
Reviewer	Comment
MOLINA Alon	
Anonymous User	Hidden by assessment setting
STUDENT3 New3	Sample

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

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



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



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

# Task Approval

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

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

## Task Approval

Task Status: Pending Sign Off (dropdown) | Approver's Role: All (dropdown) | First Name: [input] | Last Name: [input]

Task Title: [input] |  Tasks with Reminder

**Filter**

Search results per page: 25 (dropdown)

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

Showing: 1 - 2 of 2

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

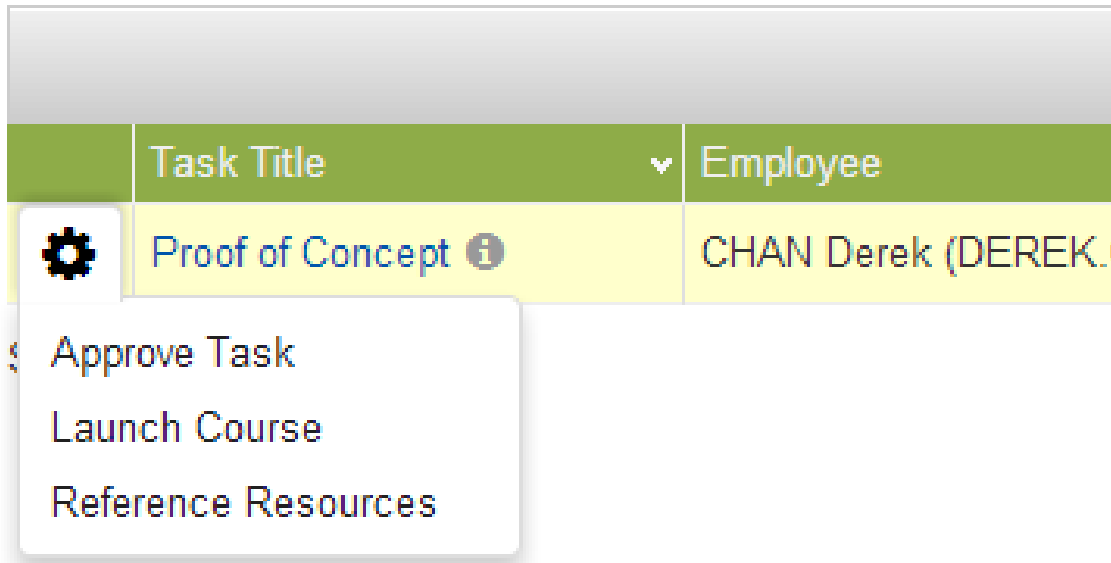
	Task Title	Employee	Enrolled on
⚙️	TASK-002 ⓘ	BROWN Joseph (LEARNER02)	08-M
⚙️	TASK-004 ⓘ	BROWN Joseph (LEARNER02)	08-M

**TASK-002**

This task is mandatory for all employee and would be approved by his/her Direct Appraiser

Showing: 1 - 2 of 2

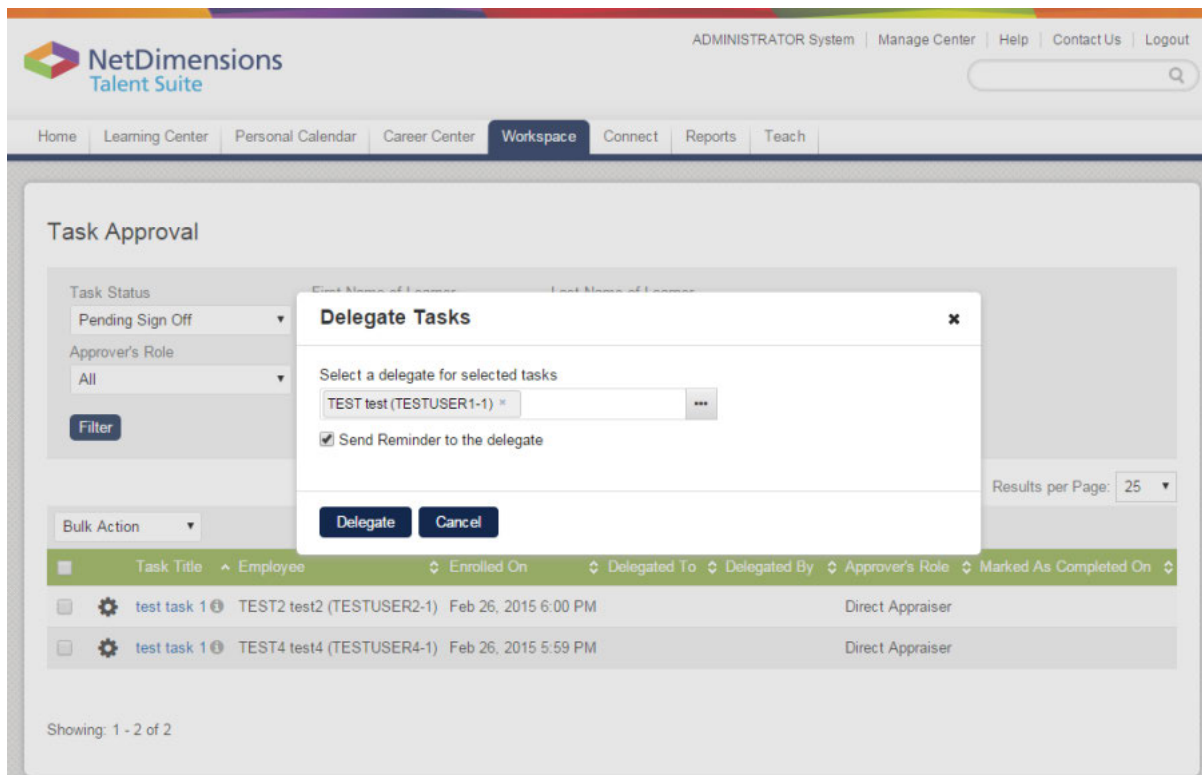
3. You can see more detailed information about the task before approving it by launching it or examining reference resources via the **Tool** icon



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

### Delegating Task Approval

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



A reminder can be sent to the new delegate with the checkbox option in the setup, or from the tool icon

of the delegated task approval record.

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

## Enrollment Approval

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(Available for Performance and Learning only)


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

From here you can do the following:

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

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




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

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

### Enrollment Approval

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

Hide Filters

Owner & status

Show all pending approvals

Period

All

Keywords

Organization

Click to select

Filter

Results per Page: 10

Showing: 1 - 10 of 45

Print

Participant	Learning Program / Module	Session	Reason for Taking This	Request Date	Step Status	Exam	Approve	Reject
ACCOUNT Test (MARCUS BELBY)	Literature and Language Arts	Jan 14, 2013		Jan 14, 2013	Approval Step 2 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
ACCOUNT Test (MARCUS BELBY)	no title	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
							Add to cart	
							Payment Method:	
							Online Payment	
							Currency: (CAD)	
ACCOUNT Test (MARCUS BELBY)	Pay by Approver (SH)	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		List Price: USD100.00	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
							Price Info: HKD	
							Token	
							List Price: 100.00 Tokens/Credits	
ADAMS Cat (ING_CAT)	no title	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
							Add to cart	
							Payment Method:	
							Online Payment	
							Currency: (CAD)	
ADAMS Cat (ING_CAT)	Pay by Approver (SH)	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		List Price: USD100.00	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
							Price Info: HKD	
							Token	
							List Price: 100.00 Tokens/Credits	
ADAMS Cat (ZCORP_CAT)	no title	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
							Add to cart	
							Payment Method:	
							Online Payment	
							Currency: (CAD)	
ADAMS Cat (ZCORP_CAT)	Pay by Approver (SH)	Jan 14, 2013		Jan 14, 2013	Approval Step 1 (Awaiting Response)		List Price: USD100.00	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
							Price Info: HKD	
							Token	
							List Price: 100.00 Tokens/Credits	
ADAMS Cat (ING_CAT)	Literature and Language Arts	Sep 4, 2012		Sep 4, 2012	Approval Step 2 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
ADAMS Cat (ZCORP_CAT)	Literature and Language Arts	Sep 4, 2012		Sep 4, 2012	Approval Step 2 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>
ADAMS Jane (NETD_AJKA)	Literature and Language Arts	Jan 14, 2013		Jan 14, 2013	Approval Step 2 (Awaiting Response)		<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px;">Approve</a>	<a href="#" style="background-color: #333; color: white; padding: 2px 5px;">Deny</a>

Showing: 1 - 10 of 45

Print

NetDimensions

## Combine Enroll and Single Step Approval

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

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

### Enrollment Approval

#### For Test classroom

**ENROLLMENT APPROVAL REQUEST**

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

Reason for Enrollment\*

Enter justification here.

**ADDITIONAL INFORMATION**

Preferred Date

(not specified)

Comments\*

Required

Approve and Enroll

Cancel

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

### Approval Delegation

(Available for Performance and Learning only)

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

1. Click the **Click here to delegate approval authority to other users**

2. Click the Add New Entry

**Delegation**

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

No delegates have been specified.

Add New Entry



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



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

**Delegation**

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

Delegate Name:  **Select**

Start Date: (not specified)  

End Date: (not specified)  

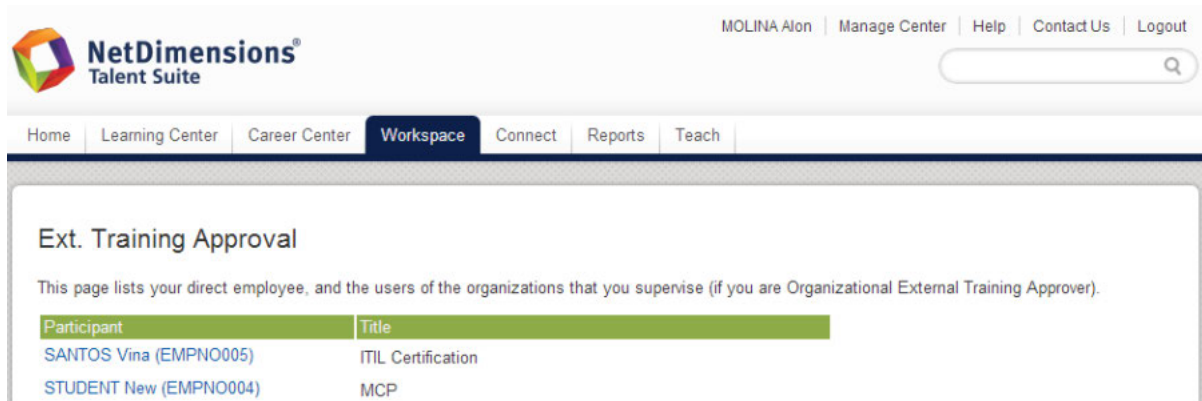
Save Cancel

Click the **Save** button.

# External Training Approval






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

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



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

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

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

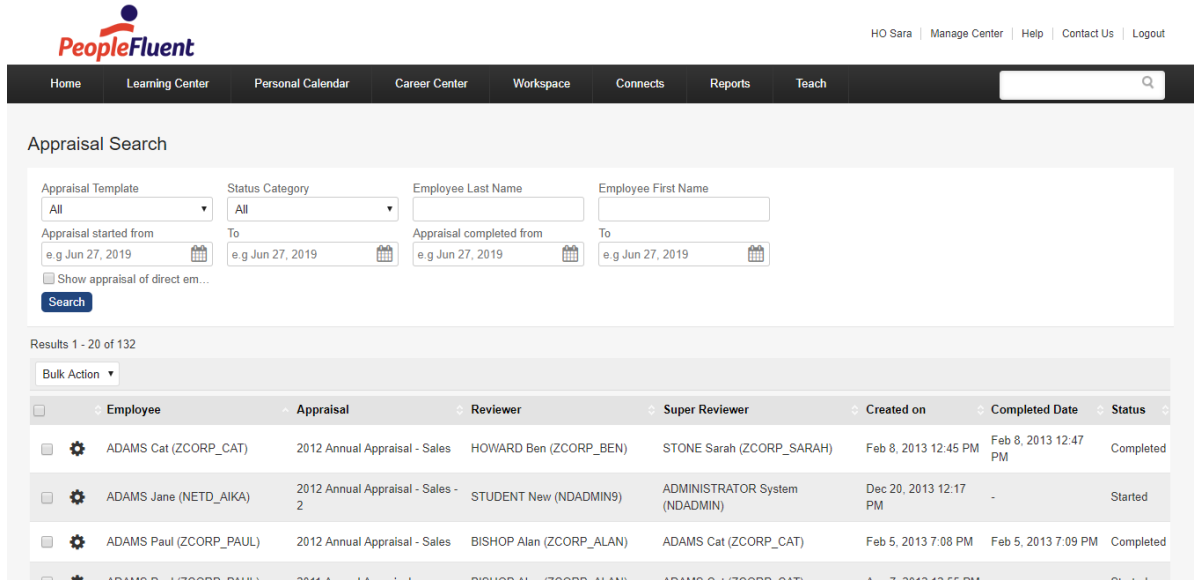
(\* Mandatory fields)

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

# Appraisal Review

(Available for Performance only)

Appraisals are accessed via Workspace > Appraisal Review:

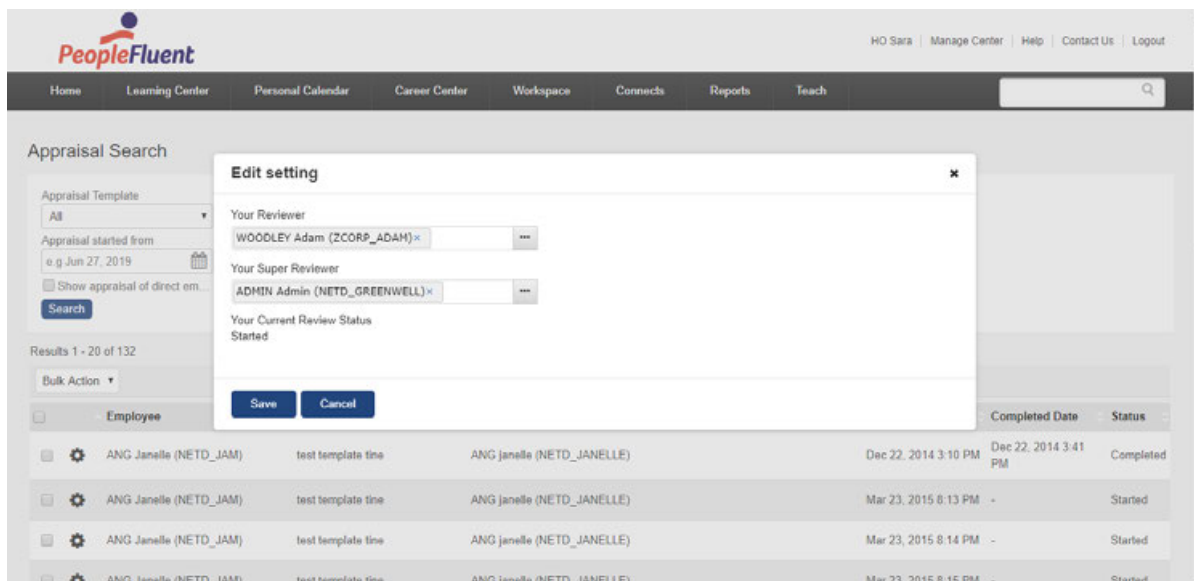


The Appraisal Review screen allows you to do the following:

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

## Changing the Appraisal Review Settings

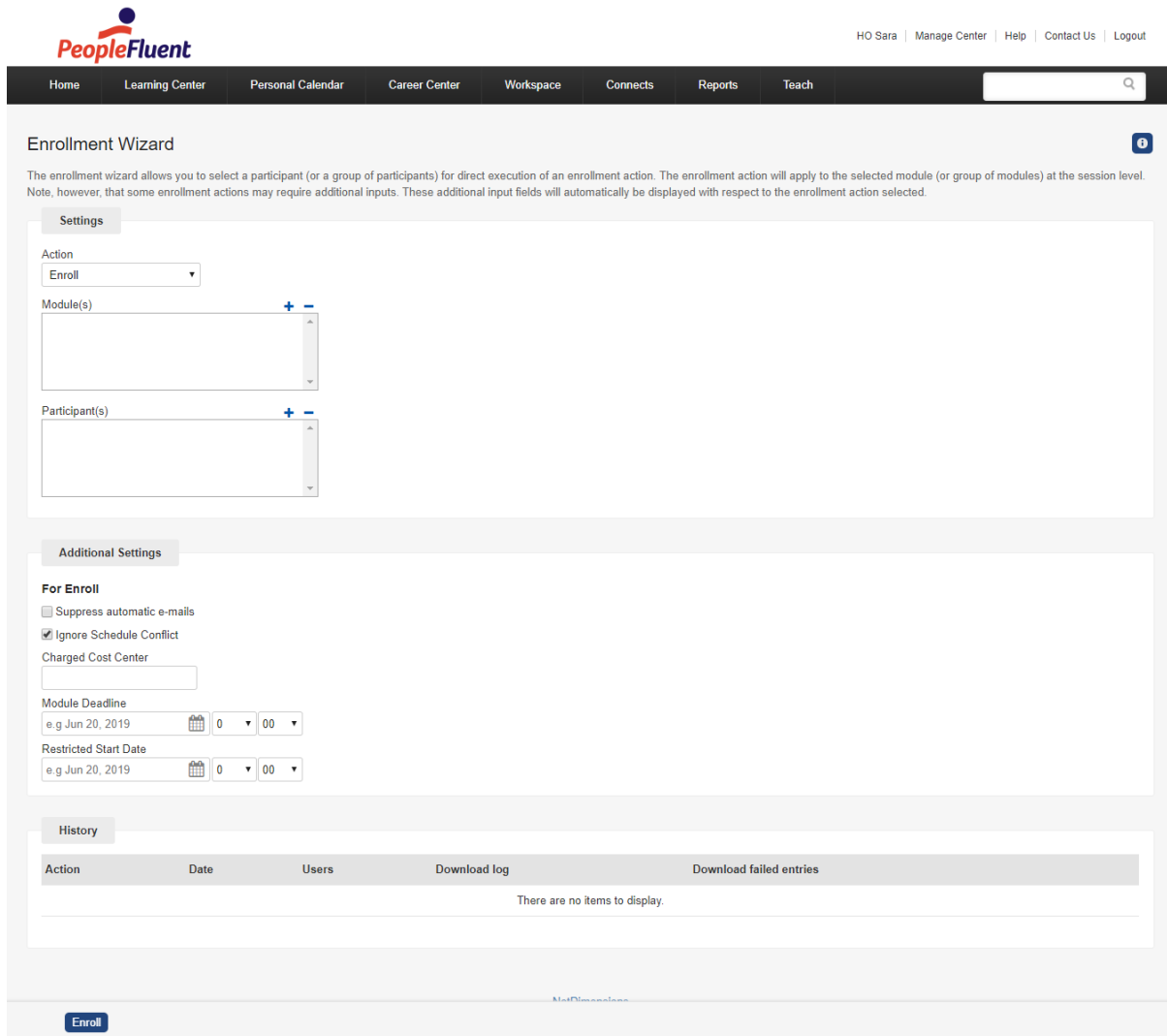
To modify the settings of an appraisal, on the **Appraisal Review** screen, click the **Tools** menu of the participant and then select **Change Setting**:



# Enrollment Wizard

(available for Performance and Learning only)

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



## Execution Parameters

You must specify the following before executing the action:

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

For Enroll Action, you can also specify additional options:

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

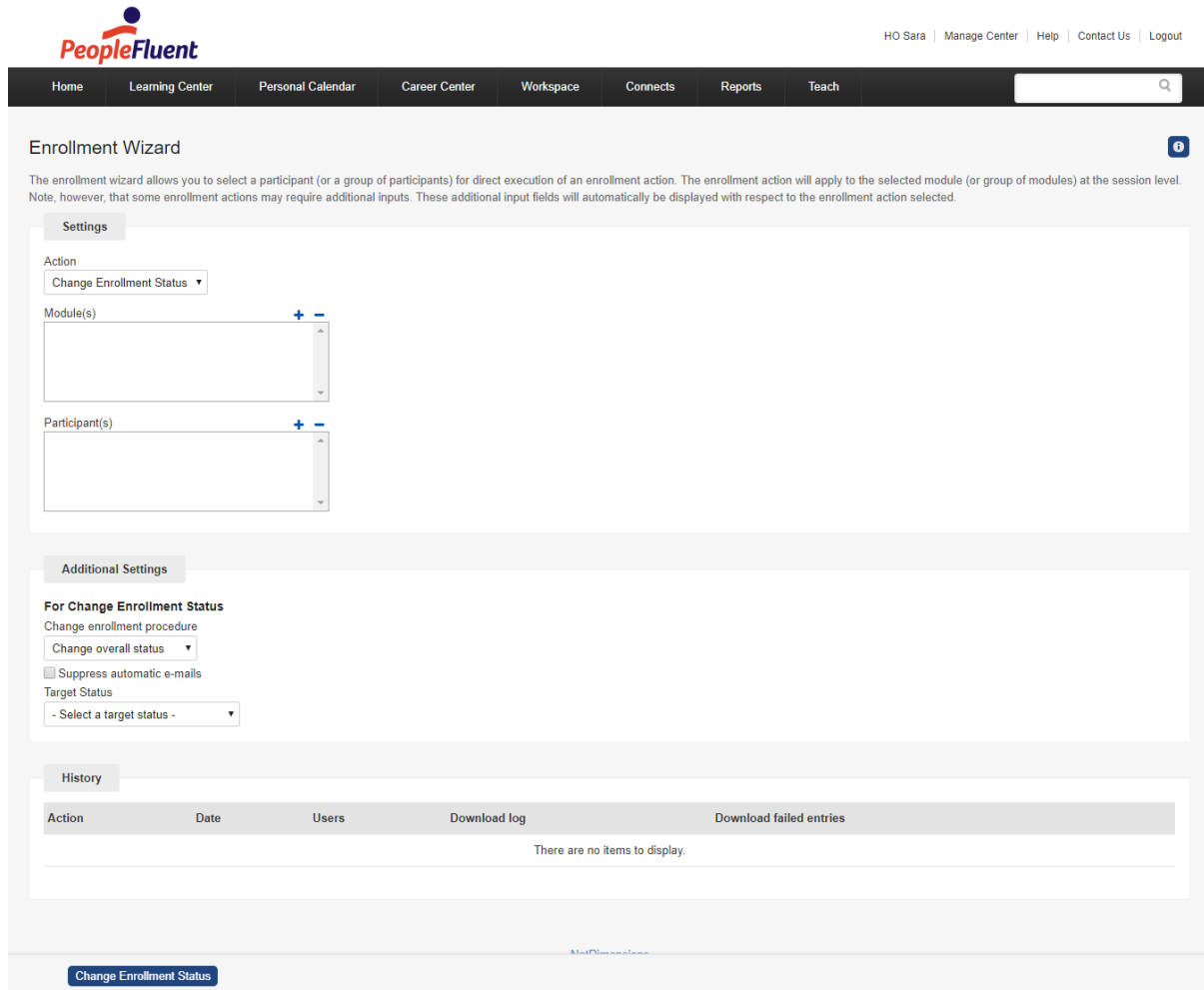
The Module Deadline in the Enrollment Wizard overrides any settings in the Catalog Editor, including for those module due dates that have already expired, will be expired, or have no due date. If a due

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

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

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

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



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



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

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

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

## Summary Report

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

## History

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



Home Learning Center Personal Calendar Career Center Workspace Connects Reports Teach

### Enrollment Wizard

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

#### Settings

Action  
- Select an action -

Module(s) + -

Participant(s) + -

#### History

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

# Compliance Analytics

(Available for Performance and Learning only)

Compliance Analytics performs a real-time analysis of training records to identify the degree (expressed in %) to which departments, groups, and individuals have completed one or more specified courses. When scanning records, courses with an overall status of **COMPLETED**, **FINISHED USING**, and **PASS ED** are interpreted as "completed" for statistical purposes.

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

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

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

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

Note:

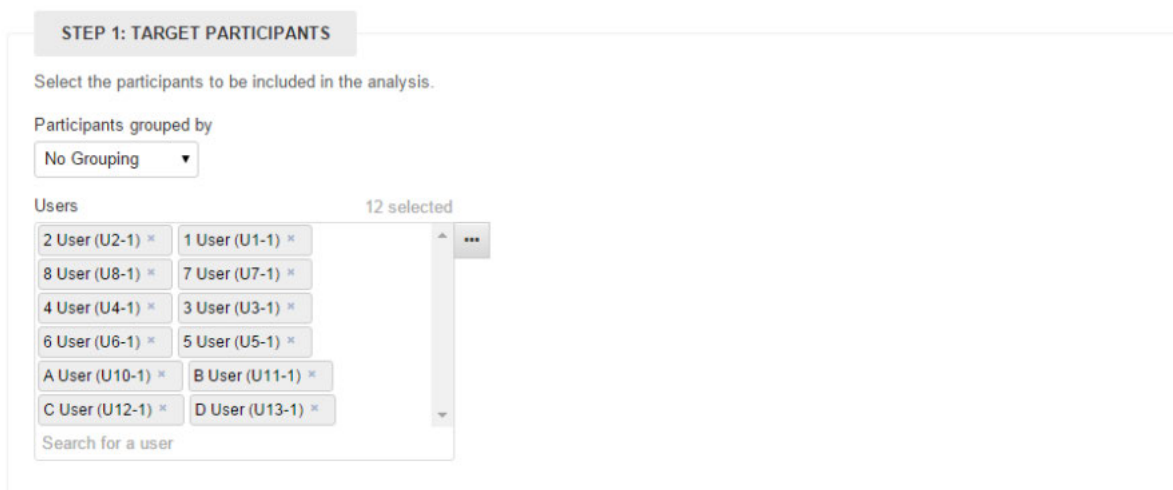
- In selecting filtering criteria, note that by default, closed user accounts (e.g., users who have left the organization) are not included in the analysis. If you do want these accounts included, uncheck the filtering option.
- If you do not want to have the statistics applied to all members of the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

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

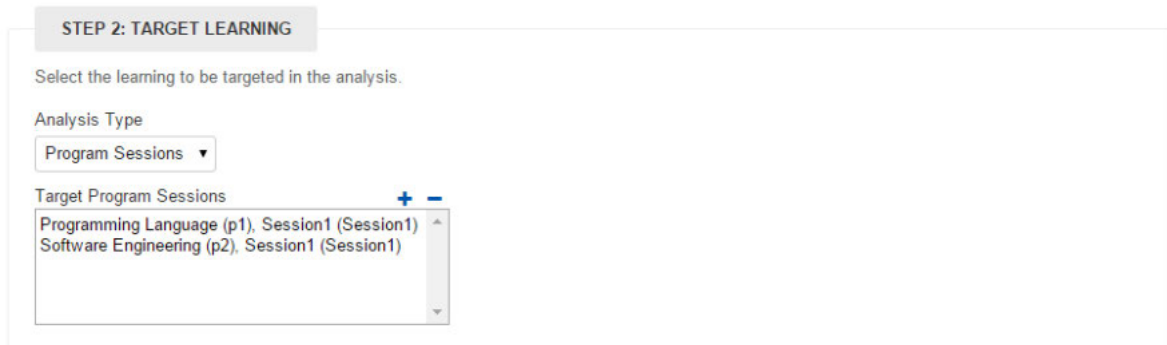
To access Compliance Analytics, go to **Manage Center > TALENT > COMPLIANCE ANALYTICS > Compliance Analysis**.

## Step 1: Participant Selection

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



## Step 2: Module Selection



There are three Analysis Types available:

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

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

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

The learner's records would look similar to:

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

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

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

## Step 3: Transcript Selection

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

**STEP 3: TARGET TRANSCRIPTS**

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

Include self-enrolled Target Learning transcripts

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

- Any of the participant's transcripts
- The participants latest transcript

### Step 4: Compliance Check

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

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

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

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

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

**STEP 4: CRITERIA FOR COMPLIANCE**

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

Compliance Definition


Learning completed between

e.g Dec 7, 2017 

And

Dec 7, 2017 


Learning that is Complete or On Target  as of

Dec 7, 2017 

Revision

- Any
- Effective

Each Participant is required to comply with

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

### Step 5: Final Filtering

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

**STEP 5: RESULTS FILTERING**

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

Compliance Focus

- All Participants
- Compliant Participants Only
- Non-compliant Participants Only

Include users with no enrollments on any target learning

### Step 6: Starting Analysis

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

**67%**

OVERALL COMPLIANCE

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

**87%**

OVERALL TRAINING PROGRESS

13/15 of all mandatory training compliant

Results per Page: 10

Showing: 1 - 10 of 12

1
2
›
››

Bulk Action	Participant Name	Modules	Last Updated On	Training Progress	Training Progress %	Compliance Status
<input type="checkbox"/>	1 User (U1-1)	<ul style="list-style-type: none"> <li>• Programming Language (p1)</li> <li>• Software Engineering (p2)</li> </ul>	Sep 14, 2015 3:00 PM WST	Mandatory 3/3 Optional 0/1	<div style="width: 100%; height: 10px; background-color: #0070c0;"></div> 100% (3/3 mandatory)	✔ Compliant
<input type="checkbox"/>	5 User (U5-1)	<ul style="list-style-type: none"> <li>• Programming Language (p1)</li> </ul>	Sep 14, 2015 3:04 PM WST	Mandatory 1/1 Optional 1/1	<div style="width: 100%; height: 10px; background-color: #0070c0;"></div> 100% (1/1 mandatory)	✔ Compliant
<input type="checkbox"/>	7 User (U7-1)	<ul style="list-style-type: none"> <li>• Software Engineering (p2)</li> </ul>	Sep 14, 2015 3:04 PM WST	Mandatory 2/2	<div style="width: 100%; height: 10px; background-color: #0070c0;"></div> 100% (2/2 mandatory)	✔ Compliant
<input type="checkbox"/>	8 User (U8-1)	<ul style="list-style-type: none"> <li>• Programming Language (p1)</li> <li>• Software Engineering (p2)</li> </ul>	Sep 14, 2015 3:07 PM WST	Mandatory 3/3 Optional 1/1	<div style="width: 100%; height: 10px; background-color: #0070c0;"></div> 100% (3/3 mandatory)	✔ Compliant
<input type="checkbox"/>	6 User (U6-1)	<ul style="list-style-type: none"> <li>• Programming Language (p1)</li> <li>• Software Engineering (p2)</li> </ul>	Sep 12, 2015 2:51 PM WST	Mandatory 2/3 Optional 1/1	<div style="width: 67%; height: 10px; background-color: #0070c0;"></div> 67% (2/3 mandatory)	✘ Not Compliant
<input type="checkbox"/>	4 User (U4-1)	<ul style="list-style-type: none"> <li>• Programming Language (p1)</li> <li>• Software Engineering (p2)</li> </ul>	Sep 14, 2015 3:04 PM WST	Mandatory 2/3 Optional 1/1	<div style="width: 67%; height: 10px; background-color: #0070c0;"></div> 67% (2/3 mandatory)	✘ Not Compliant
<input type="checkbox"/>	2 User (U2-1)	N/A	-	N/A	N/A	N/A
<input type="checkbox"/>	3 User (U3-1)	N/A	-	N/A	N/A	N/A
<input type="checkbox"/>	A User (U10-1)	N/A	-	N/A	N/A	N/A
<input type="checkbox"/>	B User (U11-1)	N/A	-	N/A	N/A	N/A

Showing: 1 - 10 of 12

1
2
›
››

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

**100%**

OVERALL COMPLIANCE

4/4 of participants compliant

**100%**

OVERALL TRAINING PROGRESS

9/9 of all mandatory training compliant

Results per Page: 25

Showing: 1 - 4 of 4

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

## Usability

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

**Compliance Analysis**

For Program Sessions Print Change Settings

Selected Program Sessions:  Programming Language, Session 1  Software Engineering, Session 1

Include closed user accounts:  No

Include self-enrolled Target Learning transcripts:  Yes

[Show Settings Details](#)

### Selected Organizations

**50%**

OVERALL COMPLIANCE

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

**73%**

OVERALL TRAINING PROGRESS

11/15 of all mandatory training compliant

Results per Page: 25

Showing: 1 - 2 of 2

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

Showing: 1 - 2 of 2

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

<b>100%</b> OVERALL COMPLIANCE 1/1 of participants compliant	<b>100%</b> OVERALL TRAINING PROGRESS 3/3 of all mandatory training compliant				
1 User ALL/Engineering					
<a href="#">Progress Tracker</a>					
Module Title	Enrolled On	Completed On	Deadline	Last Updated On	Compliance Status
<b>Programming Language (p1)</b> C++ (m2) Optional Java (m1) *Mandatory J2EE (m5) Completed By Substitutes	Sep 14, 2015 2:56 PM WST	Sep 14, 2015 3:00 PM WST	-	-	✓ Compliant
	Sep 14, 2015 2:56 PM WST	-	-	Sep 14, 2015 2:56 PM WST	N/A
	Sep 14, 2015 2:59 PM WST	Sep 14, 2015 3:00 PM WST	-	Sep 14, 2015 3:00 PM WST	✓ Compliant
	Sep 14, 2015 2:57 PM WST	Sep 14, 2015 3:00 PM WST	-	-	✓ Compliant
Software Process (m3) *Mandatory	Sep 14, 2015 2:57 PM WST	Sep 14, 2015 3:00 PM WST	-	Sep 14, 2015 3:00 PM WST	✓ Compliant
Software Testing (m4) *Mandatory	Sep 14, 2015 2:57 PM WST	Sep 14, 2015 3:00 PM WST	-	Sep 14, 2015 3:00 PM WST	✓ Compliant

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

The screenshot shows the 'Compliance Analysis' interface. At the top, there are navigation tabs: OVERVIEW, LEARNING, TALENT, COMMUNICATE, USERS, REPORTS, SYSTEM. The main content area includes a 'For Modules' section with settings for 'Selected Modules' (Online1), 'Include closed user accounts' (No), and 'Include self-enrolled Target Learning transcripts' (Yes). A 'Tools' dropdown menu is open, with 'Export to CSV' highlighted by a red box and a red arrow. Below this, there are two summary cards: '0% OVERALL COMPLIANCE 0/1 of participants compliant' and '0% OVERALL TRAINING PROGRESS 0/1 of all training compliant'. At the bottom, a table shows one participant: 'student11 test (STUDENT11-1)' with a compliance status of 'Not Compliant'.

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



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

# Review Career Development Center

(Available for Performance and Learning only)

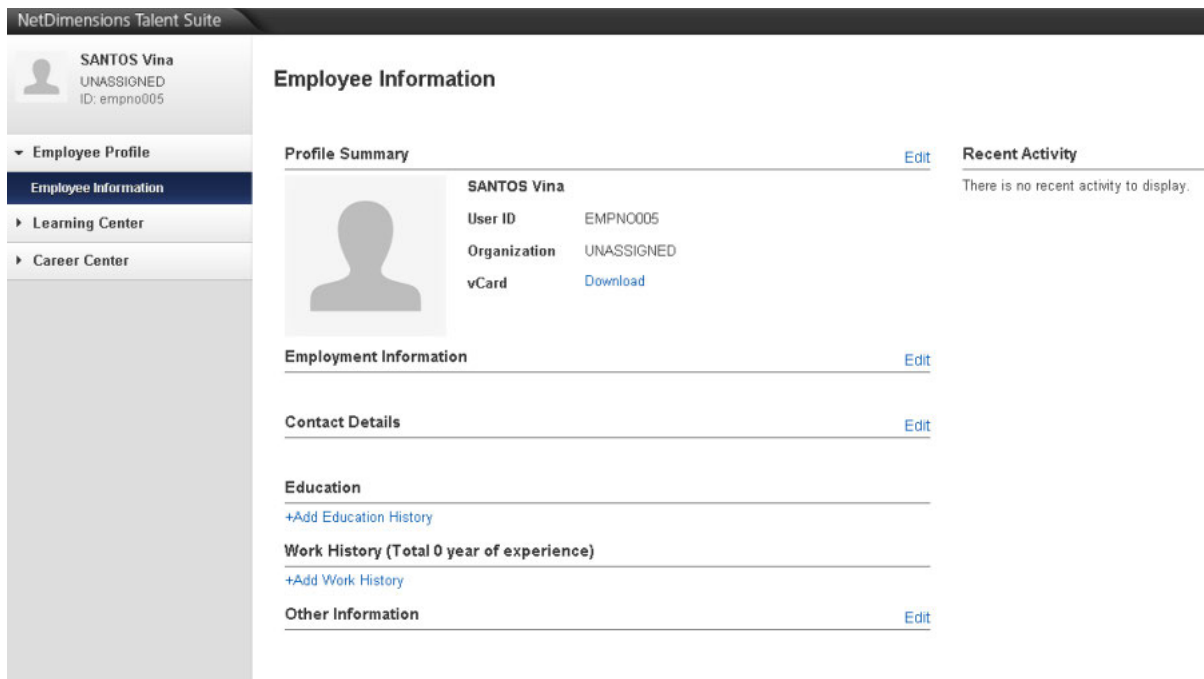
The Career Development Center is a consolidated view for learners and managers of all compliance, certification, and training plan related information. Functions included in the Career Development Center are:

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

## The Employee Profile

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

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



The Employee's Information is divided into six categories.

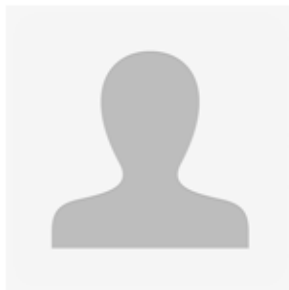
### Profile Summary

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

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

## Employee Information

### Profile Summary



[Upload Picture](#)

**SANTOS Vina**

**User ID** EMPN0005

**Organization** UNASSIGNED

**vCard** [Download](#)

**Viewing Constraints**

Allow others to see my recent course activity

### Employment Information

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

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

### Employment Information

Employment Country

Manager Name

Manager e-mail

Cost Center

Location Code

### Contact Details

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

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

### Contact Details

Company Name

Address 1

Address 2

City

Province/State

Postal Code/ZIP

Country  
 ▼

Phone

Telefax

Mobile

### Education

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

employee's education history:

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

## Education

---

**New York Univeristy, U.S** 

Sales, Marketing

Jan 1, 2012 - Present

Edit

Delete

[+Add Education History](#)

## Work History (Total 0 year of experience)

---

[+Add Work History](#)

This opens the menu for adding education history.

## Education

---

### New York Univeristy, U.S

Sales, Marketing

Jan 1, 2012 - Present

#### Add Education History



Institution\*

Location\*



Degree\*

Field of Study\*

Start Date\*

End Date

Present

### Work History

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

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

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

---

Encoder(Part-time) 

ABC, Manila

Jan 1, 2013 - Present

sample

sample

[+Add Work History](#)

Edit

Delete

This opens the menu for adding work history

## Work History (Total 0.1 year of experience)

---

### Encoder(Part-time)

ABC, Manila

Jan 1, 2013 - Present (<1 year)

sample

sample

#### Add Work History

Company Name\*

Required

Job Title\*

Required

Location\*

Required

Start Date\*

(not specified)



End Date

(not specified)



Present

Employment Status\*

Select



Key Achievements

Awards





A screenshot of a form interface. It features a large, empty rectangular text input area with a light gray border. Below the text area, there is a yellow horizontal bar containing two dark blue buttons with white text: "Save" and "Cancel".

**Other Information**

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

**Other Information**



A screenshot of a form interface, identical to the one above. It features a large, empty rectangular text input area with a light gray border. Below the text area, there is a yellow horizontal bar containing two dark blue buttons with white text: "Save" and "Cancel".

## Learning Center

(Available for Performance, learning, and eLearning only)

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

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


### Learning Center Summary

The Learning Center summary shows the following information:

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

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

NetDimensions Talent Suite
CDC



**K CP**  
AVP  
solo  
ID: cpk

- ▶ EMPLOYEE PROFILE
- ▼ LEARNING CENTER
  - SUMMARY**
  - LEARNING
  - ENROLLMENT REQUESTS
  - CERTIFICATIONS
  - TRAINING PLAN
  - LEARNING PATH
  - PROGRESS TRACKER
  - LEARNING GROUP
  - LEARNING REPORTS
  - ACCOUNTS
  - SCORM GLOBAL OBJECTIVES
- ▶ CAREER CENTER

### Learning Center Summary

**Competency Training Status**

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









**Certifications Awarded**





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

**Training Plan**

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

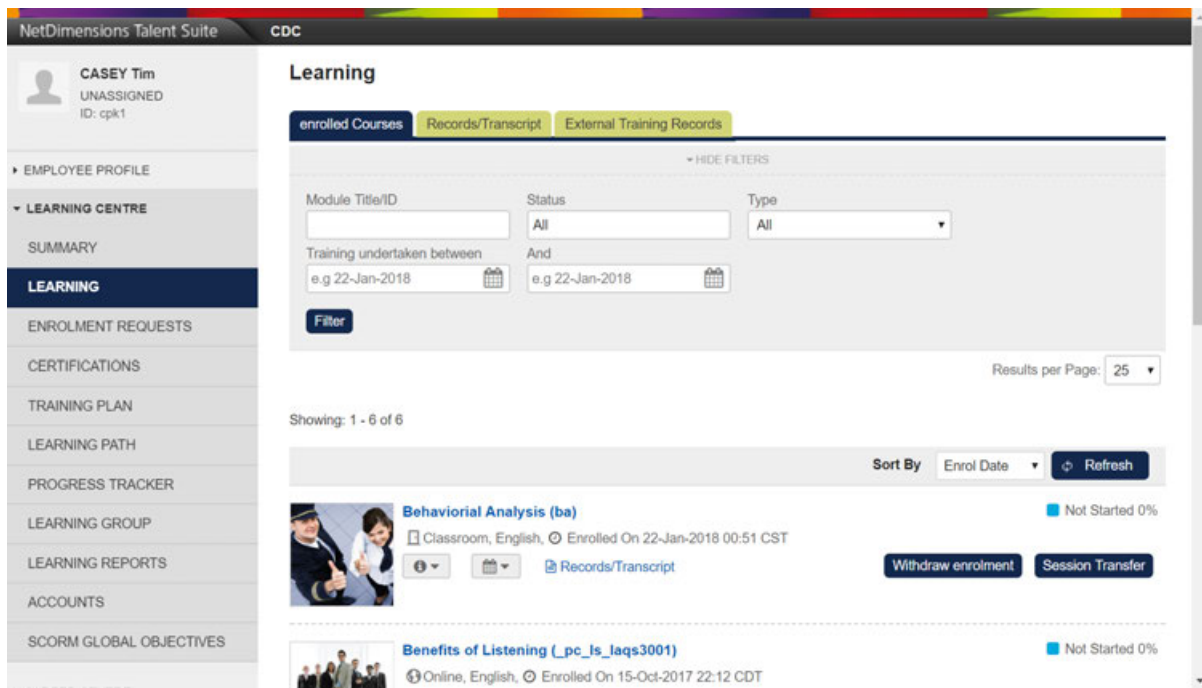
**In CP's learning groups (12)**

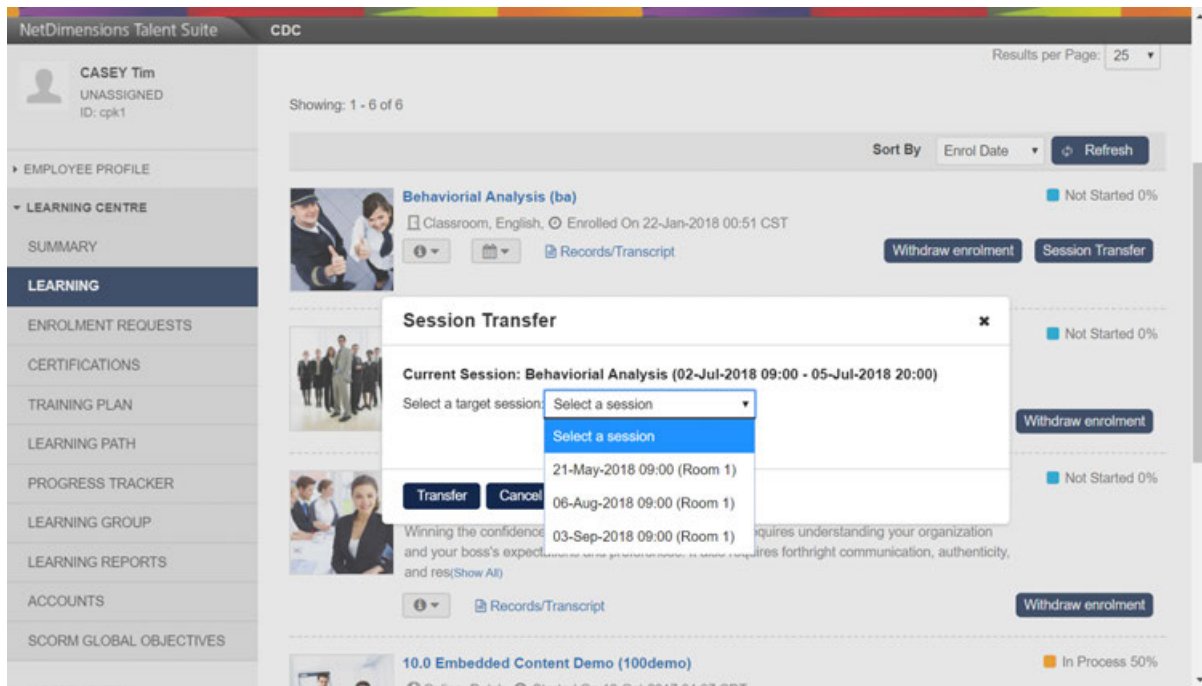
## Enrolled Learning Modules

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



### Session Transfer

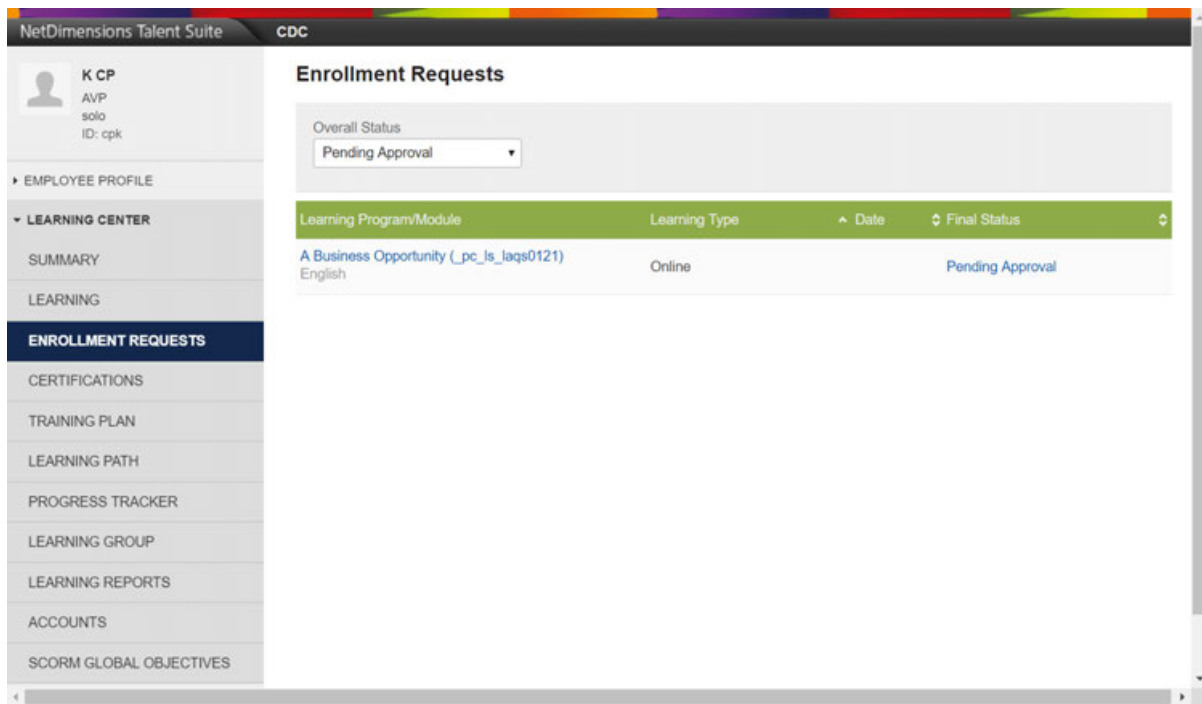
Reviewers can transfer the sessions in the active records of users to another one. To do so, click **Session Transfer**, and then select the desired session to transfer to from the popup window.



### Enrollment Requests

(Available for Performance and Learning only)

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



### Records/Transcripts

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

**Learning**

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

▼ HIDE FILTERS

Module Title/ID:  Status: All Type: All

Training undertaken between: e.g Dec 28, 2017 And: e.g Dec 28, 2017

Filter

Results per Page: 25

Showing: 1 - 8 of 8

Bulk Action

<input type="checkbox"/>	Learning Module Name	Status	Start Date - End Date	Score	Credits	Other Information
<input type="checkbox"/>	Behavioral Analysis (ba) English	Waitlisted	Jan 15, 2018 10:00 AM - Jan 18, 2018 5:30 PM HKT		0	Residential (UX1): No Required: No
<input type="checkbox"/>	Acting Decisively (_pc_ch_lach034) English	Completed	Aug 17, 2017 10:21 AM - Aug 17, 2017 10:21 AM HKT		0.25	Residential (UX1): No Required: No
<input type="checkbox"/>	An Introduction to Project Management (PROJ0511) English	In Process	Jul 12, 2017 1:30 PM HKT		2.5	Residential (UX1): No Required: No
<input type="checkbox"/>	Feedback Behaviors (_pc_ls_paqs0601) English	Completed	Jul 11, 2017 3:24 PM - Jul 11, 2017 3:24 PM HKT		0.05	Residential (UX1): No Required: No
<input type="checkbox"/>	A Business Opportunity (_pc_ls_laqs0121) English	Pending Approval		90%	0.083	Residential (UX1): No Required: No
<input type="checkbox"/>	Anticipating and Solving Problems as a Project Champion (_pc_bi_pmbi007) English	Not Started			0.083	Residential (UX1): No Required: No

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

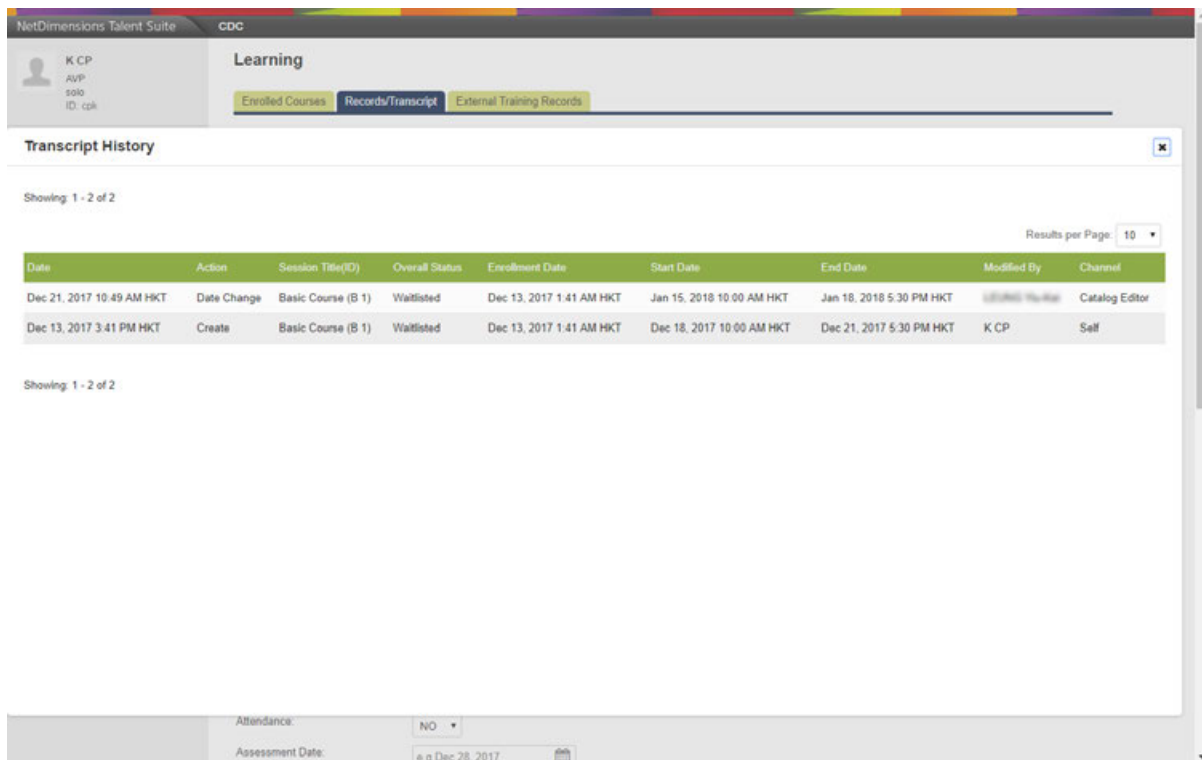
- View and update, and print a copy of the participant's transcript records for a specific learning module or program.
- Print a report of your participant's transcript records for multiple learning objects.

**View Records/Transcript**

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

The screenshot shows the NetDimensions Talent Suite interface. At the top, it says 'NetDimensions Talent Suite' and 'CDC'. On the left, there is a user profile for 'K CP' (AVP solo, ID: cpk) and a navigation menu with categories like 'EMPLOYEE PROFILE', 'LEARNING CENTER', and 'CAREER CENTER'. The 'LEARNING CENTER' is expanded to show 'LEARNING', 'ENROLLMENT REQUESTS', 'CERTIFICATIONS', 'TRAINING PLAN', 'LEARNING PATH', 'PROGRESS TRACKER', 'LEARNING GROUP', 'LEARNING REPORTS', 'ACCOUNTS', and 'SCORM GLOBAL OBJECTIVES'. The main content area is titled 'Learning' and has three tabs: 'Enrolled Courses', 'Records/Transcript', and 'External Training Records'. The 'Records/Transcript' tab is active, showing details for a course titled 'Behaviorial Analysis (ba)'. Under 'Details', there is a link for '[ Transcript History ]'. The course information includes: 'Last modified by [redacted] on Dec 21, 2017 10:49 AM HKT', 'Enrollment Date: Dec 13, 2017 3:41 PM HKT', 'Start Date: Jan 15, 2018 10:00 AM HKT', 'End Date: Jan 18, 2018 5:30 PM HKT', 'Due Date:', 'Credits: 0.00', 'Overall Status: Waitlisted', 'Learning Module Type: Classroom', 'Residential (UX1): No', 'ID:', 'Required: No', 'Additional Comments:', 'Points:', 'CPD-Structured-Hrs:', 'CPD-Unstructured-Hrs:', '9.3 Attribute:', 'JEA Ed Credit:', 'MA-Prijs per eenheid (2015):', 'MA-Prijs per eenheid (2016):', 'MA-PPE15:', 'MA-PPE16:', 'Comments:', 'Instructors: KENT Clark (CLARK.KENT), FOX Adam (ADAM.FOX)', 'Venue: Room 1', 'Attendance: NO', 'Assessment Date: e.g Dec 28, 2017', and 'Performance Grade: No grade'.

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

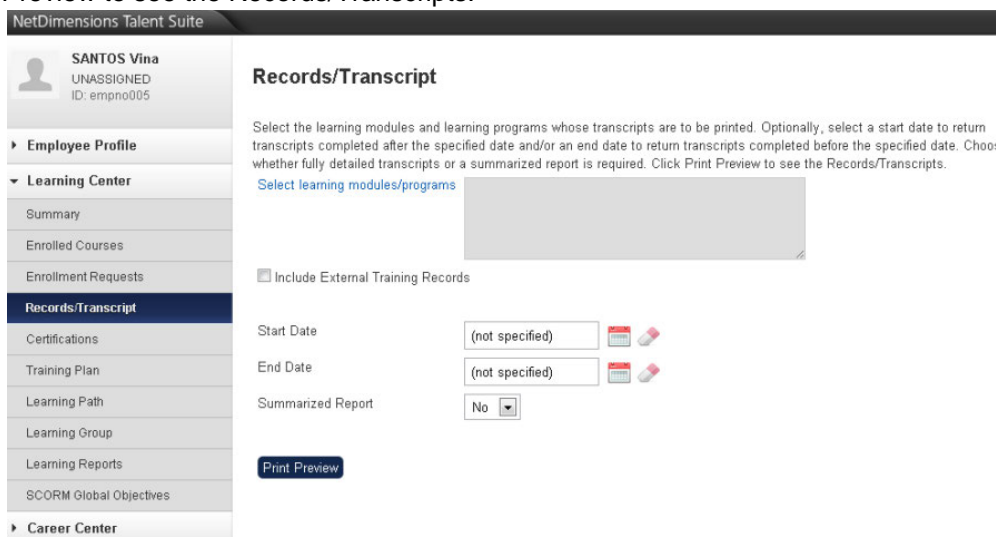


**Note:** To view Transcript History, **GENERAL SETTINGS > System Configuration > Records/Transcript > Enable Transcript History** must be checked.

4. Click **Save / Print**.

### Print Records/Transcripts Report

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



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



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

**Print**

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

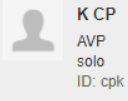
Course Title	Completed/End Date	Hours	Score	Post-assessment Score	Status
Module M1		0.0			Not Started
Module - Online - Computer 1		0.0			Pending Approval
Module - Online - English 1		0.0			Pending Approval
Module - Online - Math 1		0.0			Pending Approval

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

**Adding External Record**

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

NetDimensions Talent Suite **CDC**



**Learning**

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

**EMPLOYEE PROFILE**

**LEARNING CENTER**


- SUMMARY
- LEARNING**
- ENROLLMENT REQUESTS
- CERTIFICATIONS
- TRAINING PLAN
- LEARNING PATH
- PROGRESS TRACKER
- LEARNING GROUP
- LEARNING REPORTS
- ACCOUNTS
- SCORM GLOBAL OBJECTIVES


**CAREER CENTER**

**Title\*:**

**Course Type:** (not specified) ▾

**Subject:** \_SUBJECT-12 ▾

**Start Date\*:** e.g Dec 28, 2017 

**End Date\*:** e.g Dec 28, 2017  **Autofill**

**Venue:**

**Language:** (not specified) ▾

**Duration:** 0.0  Hour(s) ▾

**Course Cost:** 0.0


**Grade:**

**Score:**

**Vendor Information:**

**Comments:**

**Attachment:**  No file chosen

**Status\*:** (Select) ▾ 

(\* Mandatory fields)

**Create**

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

The screenshot shows the 'Learning' section of the NetDimensions Talent Suite interface. The user is logged in as K CP (AVP solo, ID: cpk). The left sidebar contains navigation options: EMPLOYEE PROFILE, LEARNING CENTER (with sub-options: SUMMARY, LEARNING, ENROLLMENT REQUESTS, CERTIFICATIONS, TRAINING PLAN, LEARNING PATH, PROGRESS TRACKER, LEARNING GROUP, LEARNING REPORTS, ACCOUNTS, SCORM GLOBAL OBJECTIVES), and CAREER CENTER. The main content area is titled 'Learning' and has three tabs: 'Enrolled Courses', 'Records/Transcript', and 'External Training Records' (which is active). Below the tabs are filter options: 'Module Title/ID', 'Status' (set to 'All'), 'Type' (set to 'All'), 'Training undertaken between' (with a date picker set to 'e.g Dec 28, 2017'), and 'And' (with a date picker set to 'e.g Dec 28, 2017'). A 'Filter' button is present. The results show 'Showing: 1 - 1 of 1' and 'Results per Page: 25'. Below the filters is a 'Bulk Action' dropdown, '+ Add external record' button, and 'Print' button. A table displays the following record:

	Learning Program/Module	Date	Status	Type	Score	Duration	Attachment
<input type="checkbox"/>	<a href="#">Excel Basics</a>	Dec 28, 2017 - Dec 29, 2017	Open for editing	Classroom	92	8.0 Hour(s)	

Below the table, it shows 'Showing: 1 - 1 of 1'.

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

## Records/Transcript

Maritime Navigation

### Details

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

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

End Date: Jul 22, 2013 10:15 AM CST

### Exam

#### Progress

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

Lesson Status: Passed

Total Training Time: 00:00:12

Total # of Online Launches: 1

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

Score: 5

#### Interactions

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

[Launch history](#)

Print

Back

### View Certifications

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

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

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

### Certifications

[+ Award New Certification](#)

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

### Awarding a New Certification

To award a new certification:

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

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

### Certifications

[+ Award New Certification](#)



No certifications have yet been awarded.

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

## Add Certification for SANTOS Vina (EMPNO005)

Select a certification for assignment below.

**Certification:**

**Issue Date:**   

**Comments:**

3. Click Award Certification.

### Viewing Certification

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

#### Certifications Awarded To ATOM Aaron

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

### Printing the Certificate

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

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

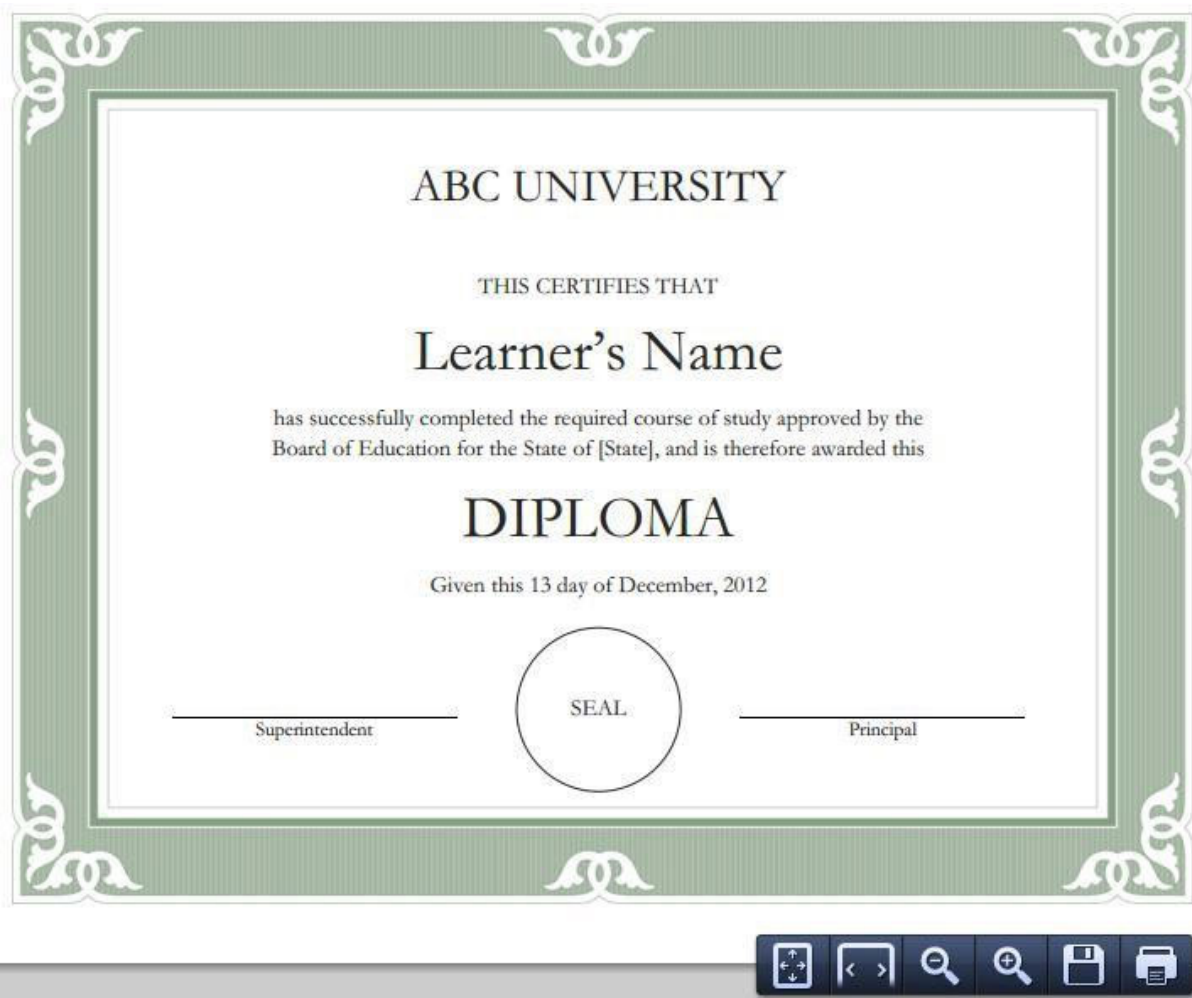
**Certifications**

+ Award New Certification

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

Print  
Delete

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



**Training Plan**

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

### Adding New Training Plan

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

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

### Training Plan

Learning Program/Module:  Select...

Comment (max. 255 characters):

Priority: Medium ▾

Complete By: (not specified)

---

Save Suggestions
Cancel

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

### Learning Path



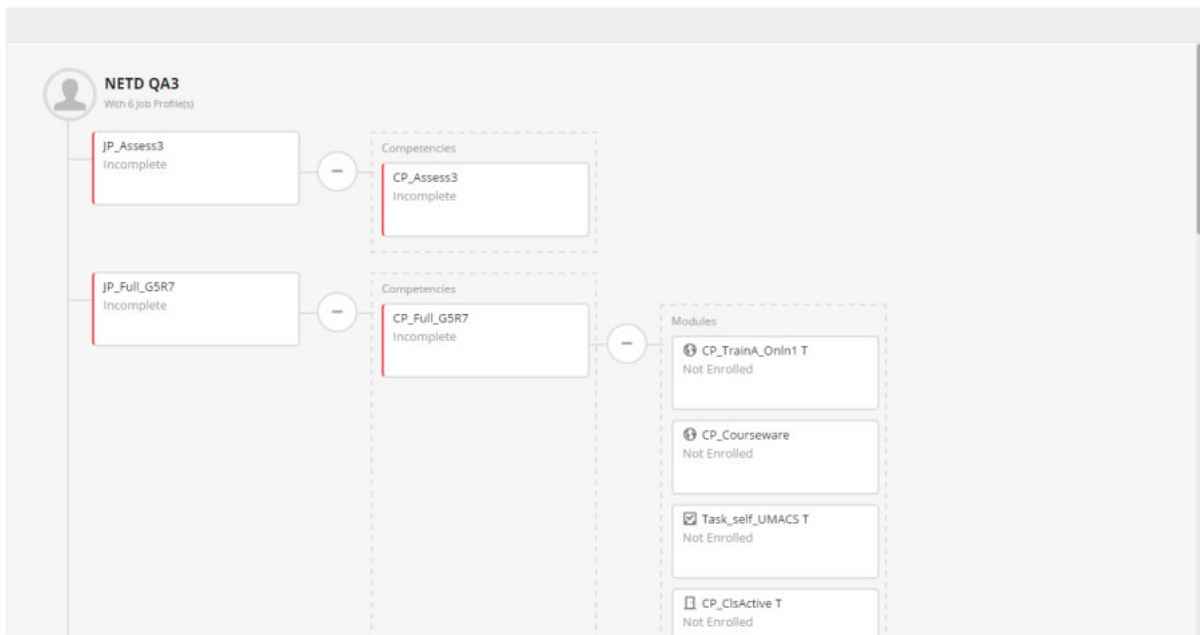
The Learning Path UI is designed to display status information with clarity, with detailed information being accessible via drilling down on a particular item, with individual items being expandable, collapsible or draggable depending on the space needed to present said information.

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

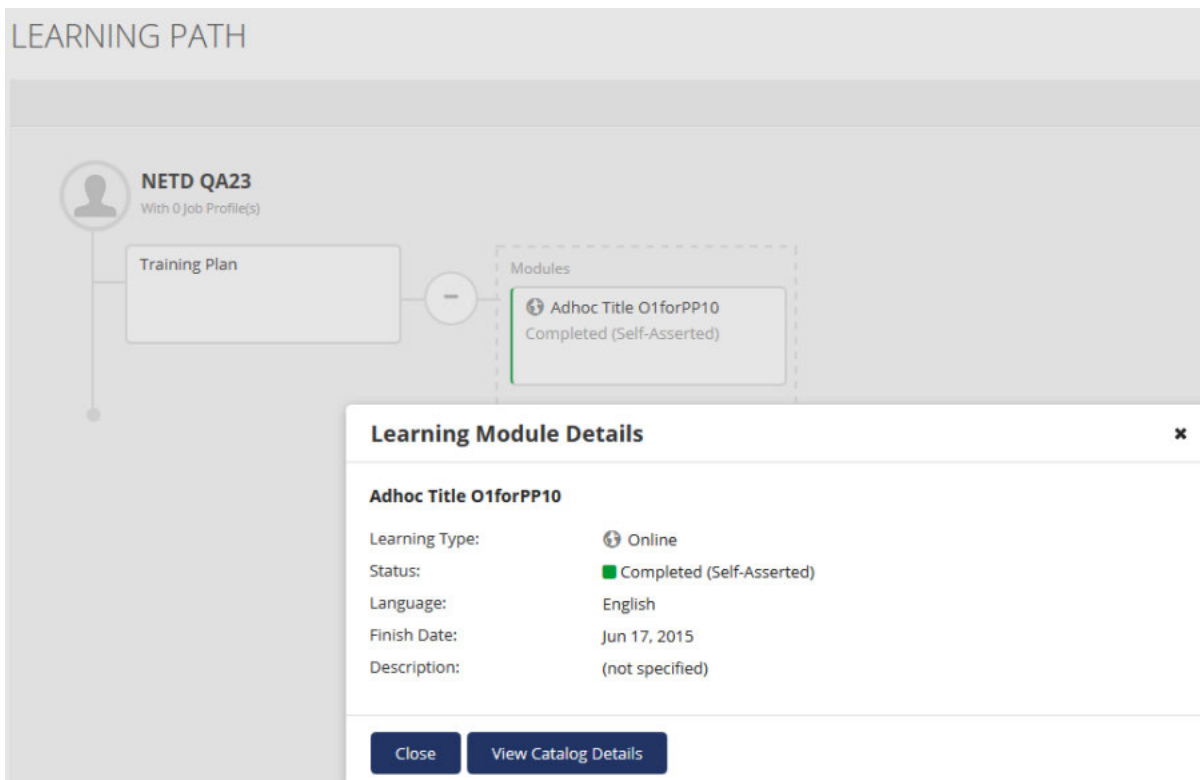
There is a plus or minus icon to expand or collapse on an item showing sub-items belonging to the hierarchy with a surrounding dotted box to clearly convey the concise partitioning of the particular hierarchical relationships. This is graphically intuitive when it comes to complex structure display of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

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

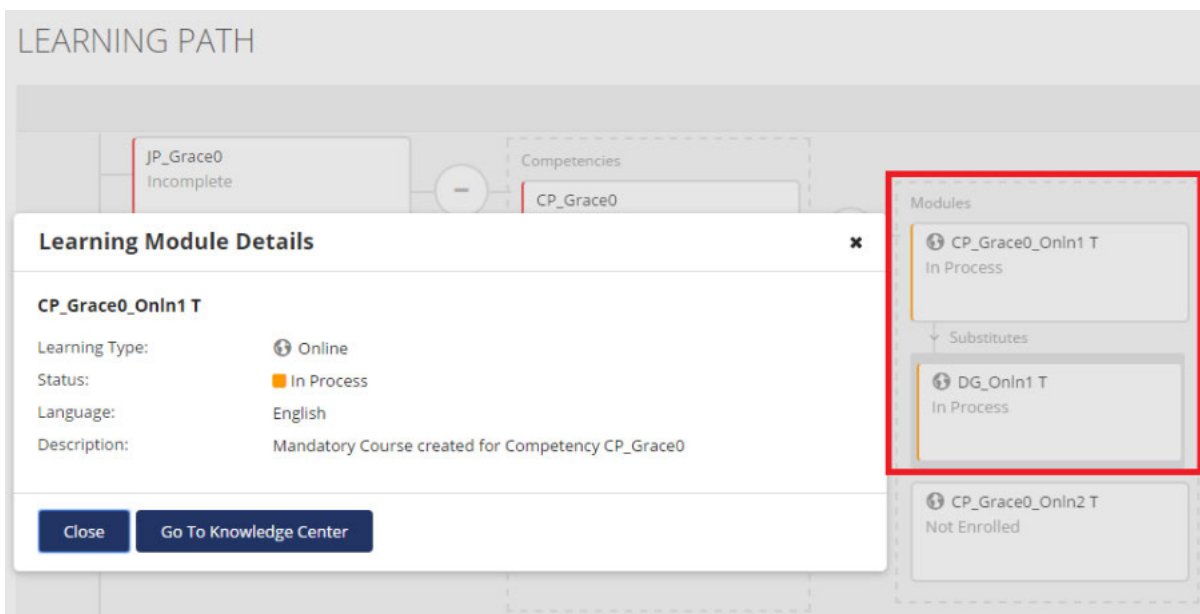
#### LEARNING PATH



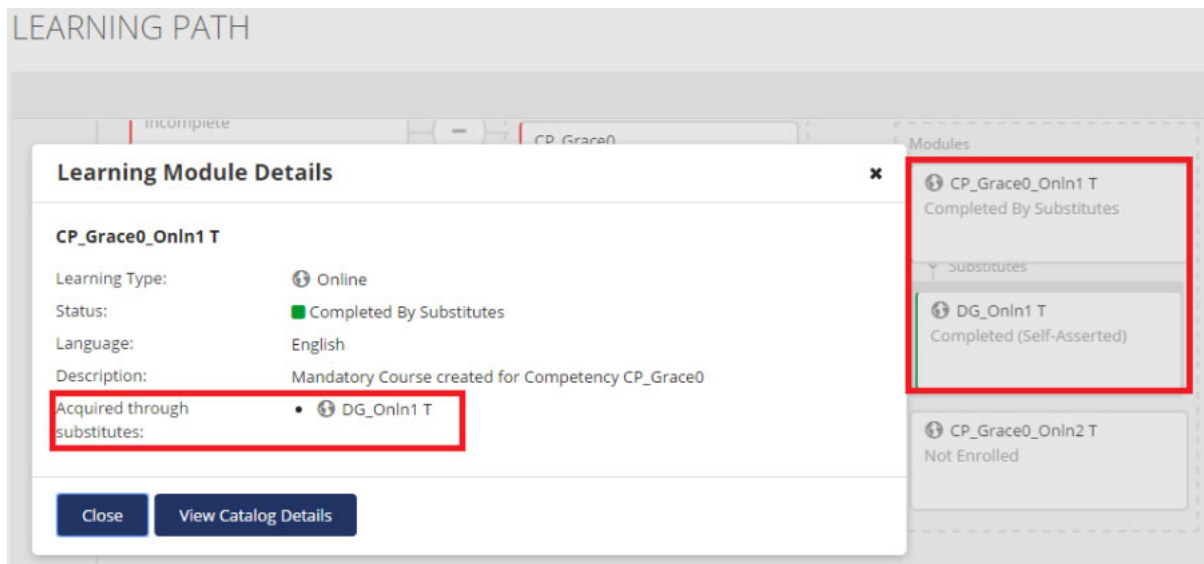
Mouse over on a particular item card will pop up a Details button for the user to drill down the detailed information on that item. There is an overlay popup to display the summarized information of the item with the appropriate redirect button to view the details page of that item like to go to the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



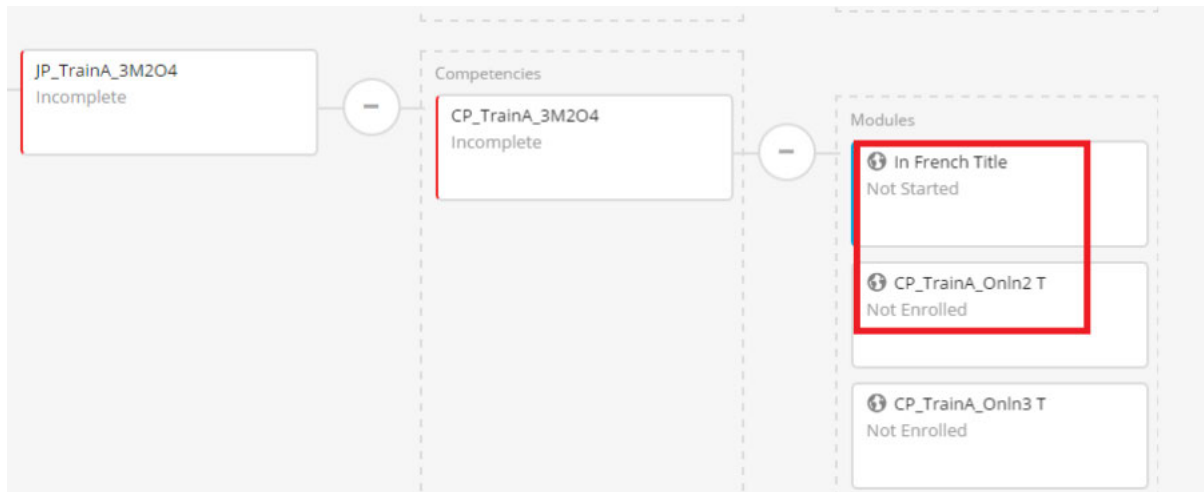
Or go to the Knowledge Center if the transcript is still in an active state.



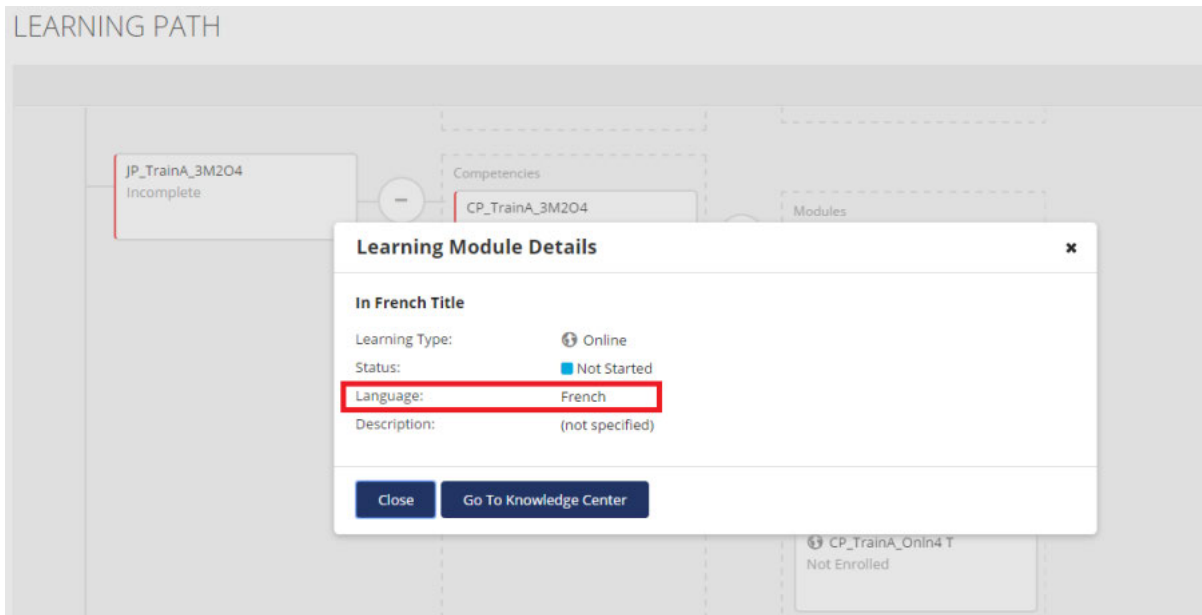
The summarized popup information includes showing the substitute information of a target module.



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



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



### View Learning Group

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

The screenshot shows the NetDimensions Talent Suite interface. At the top, there is a header bar with the text "NetDimensions Talent Suite". Below this, on the left side, is a user profile card for "SANTOS Vina" with the status "UNASSIGNED" and ID "empno005". To the right of the profile card is a "Learning Group" section. Underneath, it says "In Vina's learning groups (5)" and displays five generic person icons in a row. A vertical navigation menu is on the left, with "Learning Group" highlighted in a dark blue bar. Other menu items include "Employee Profile", "Learning Center" (with a dropdown arrow), "Summary", "Enrolled Courses", "Enrollment Requests", "Records/Transcript", "Certifications", "Training Plan", "Learning Path", "Learning Reports", "SCORM Global Objectives", and "Career Center" (with a right-pointing arrow).


### View Learning Reports

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

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


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


NetDimensions Talent Suite

 **SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

### Learning Reports


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

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

### View SCORM Global Objectives

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

NetDimensions Talent Suite

 **SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

### SCORM Global Objectives

No global objective values have been set for the user.

## Employee's Career Center

(Available for Performance and Learning only)

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

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

### Career Center Summary

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

The screenshot shows the 'Career Center Summary' page for employee SANTOS Vina (UNASSIGNED, ID: empno005). The page is titled 'Career Center Summary' and features a sidebar with navigation options: Employee Profile, Learning Center, Career Center (expanded), and Summary (selected). Under 'Summary', there are links for Job Profiles, Competencies, Training Gap Analysis, Goals, and Performance Review. The main content area is titled 'Performance Reviews in Process' and contains a table with the following data:

Template Name	Status
Competencies	Started

Below the table is a section titled 'Competency Completion Status' with a sub-section 'All Reviews'. It displays a list of competencies with their completion percentages:

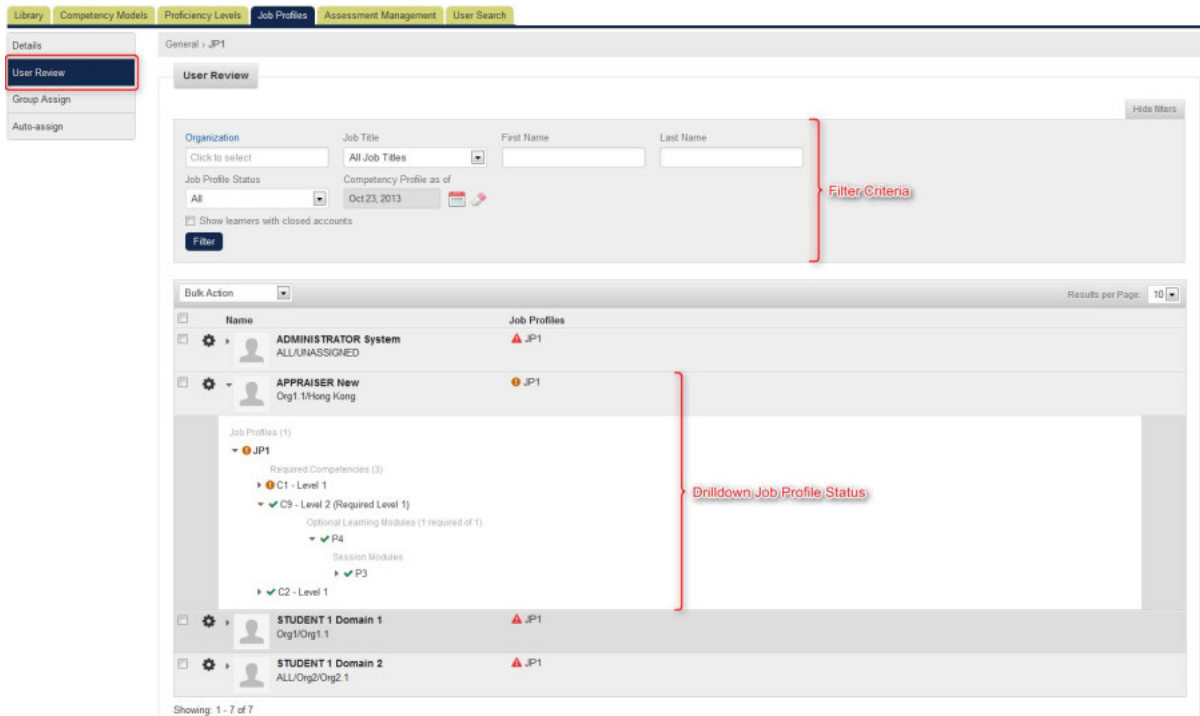
Competency	Completion Status
Lathe Operations	100%
Facilitating Change	100%
Systems integration	100%
Java	100%
Training Competency	0%

### Job Profiles

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

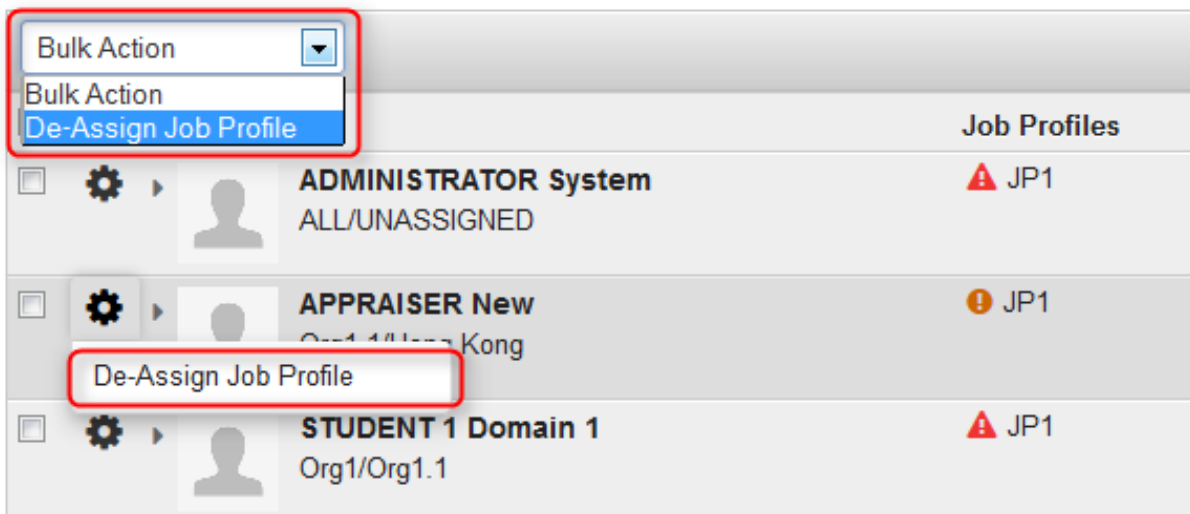
#### User Review in Job Profiles

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



The User Review page in the Job Profile Editor

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

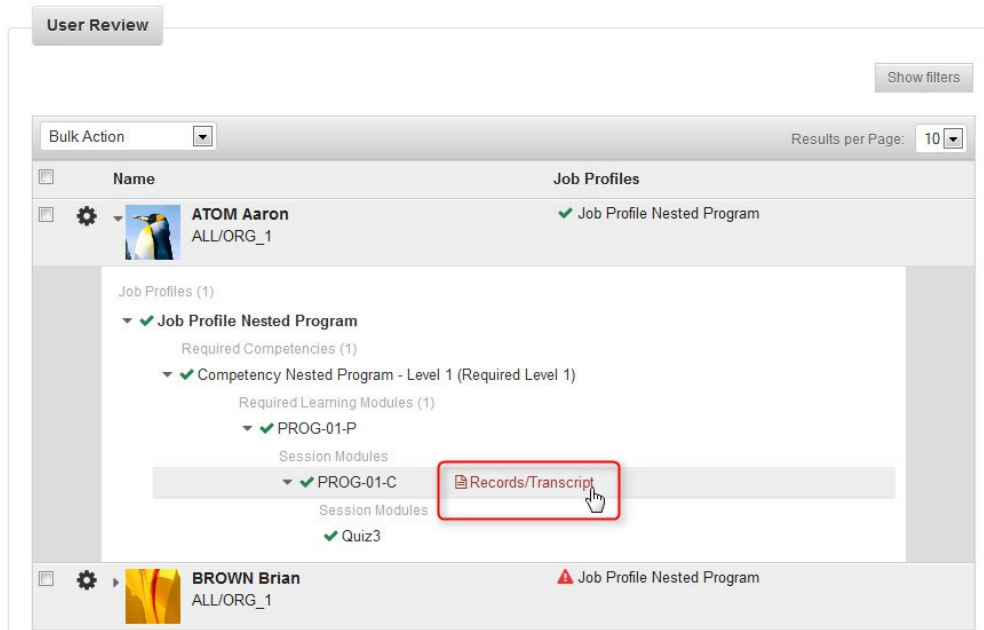


Two facilities to de-assign Job Profiles

### Job Profile Administrators Can View Transcript Details

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





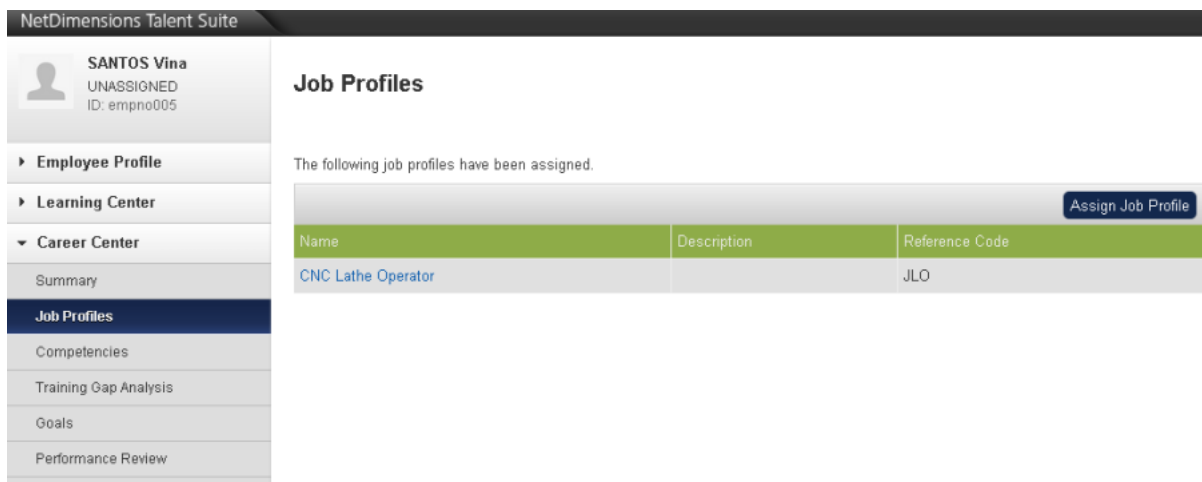
Records/Transcript link is displayed on mouse hover/click on modules.

**Note:**

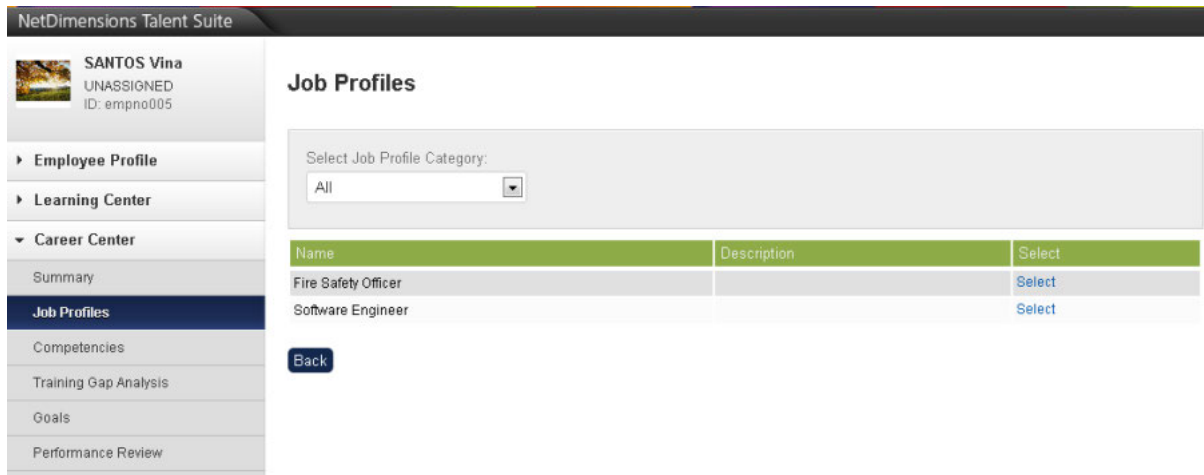
1. Transcript link is not available for past dates.
2. When a learner has enrolled on a module multiple times, the system will always display the latest transcript contributing to the Job Profile.
3. Job Profile administrators with Access Control **"Display Details, Progress, and Course Interactions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

**Assigning a Job Profile**

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

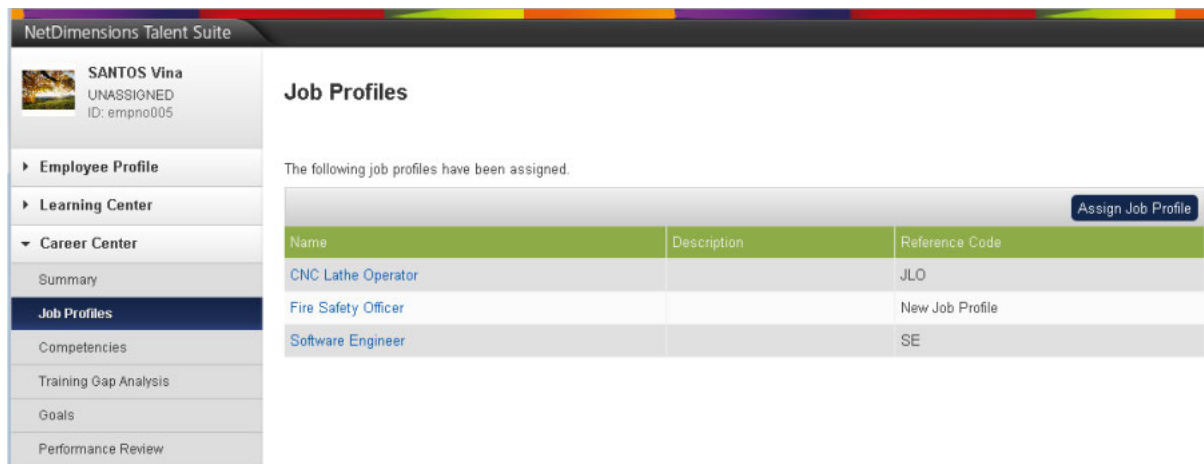


The menu displays the available job profiles. Click the **Select** link of the job profile you want to assigned.

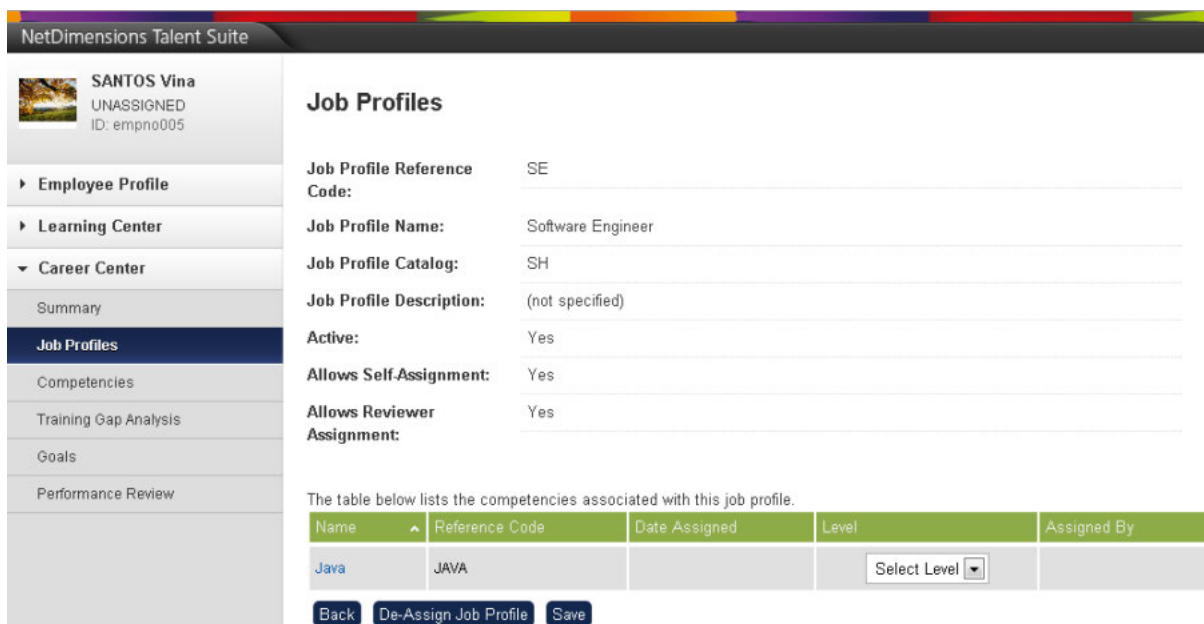


### Updating the Proficiency Level

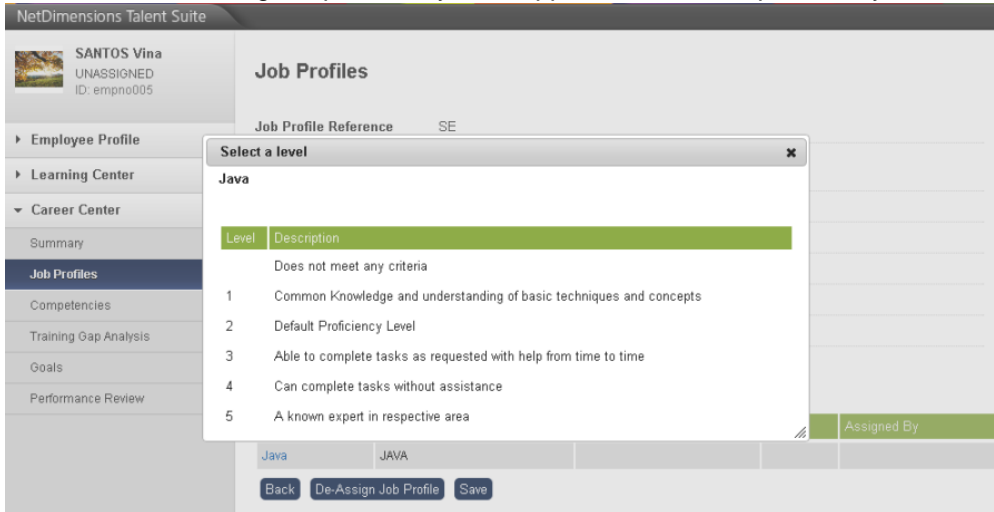
On the **Career Development Center > Career Center**, click the **Job Profiles** tab. Click the job profile you want to modify.



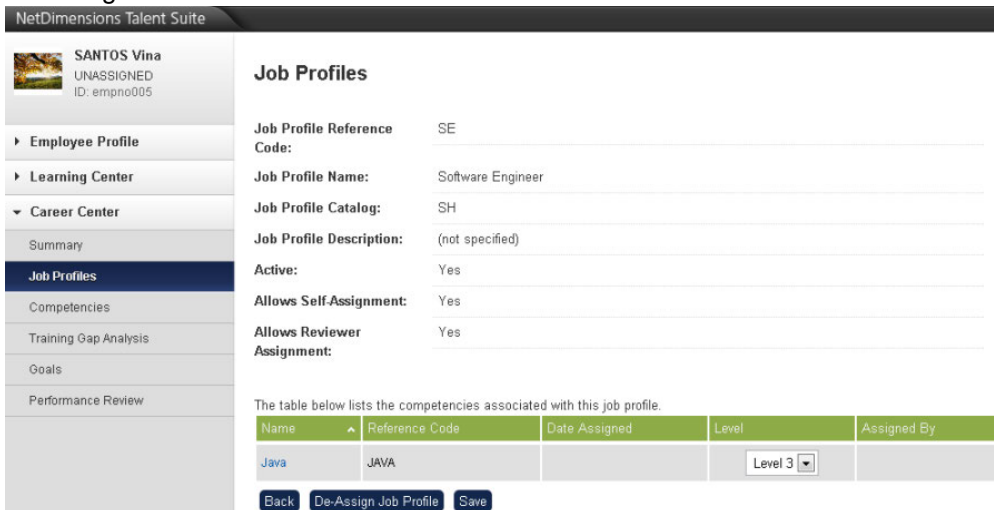
The job profile details appear on the screen. To change the proficiency level, click the **Select Level** drop down button.



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

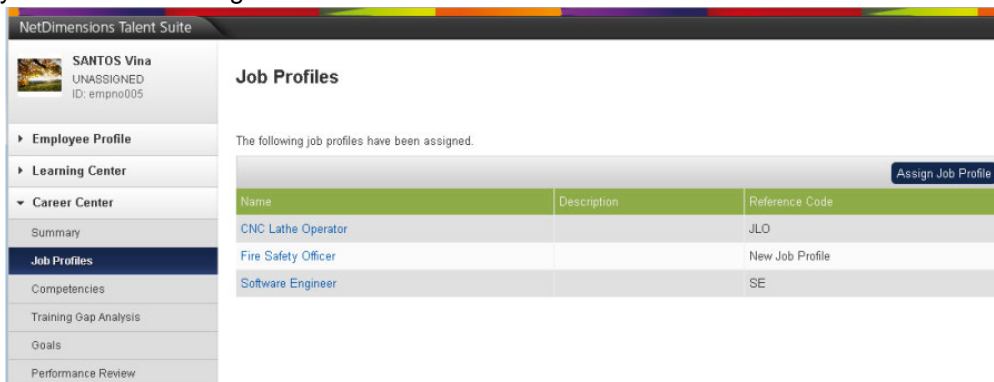


This return to job profile details with the new proficiency level displayed. Click the **Save** button to keep the changes.



### De-Assigning Job Profile

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



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

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

**Job Profiles**

Job Profile Reference Code: SE

Job Profile Name: Software Engineer

Job Profile Catalog: SH

Job Profile Description: (not specified)

Active: Yes

Allows Self-Assignment: Yes

Allows Reviewer Assignment: Yes

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

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

Buttons: Back, De-Assign Job Profile, Save

## Competencies

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

**Competencies**

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

Buttons: Award Competency, Update proficiency level, View assessment

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

**Competency Assessments**

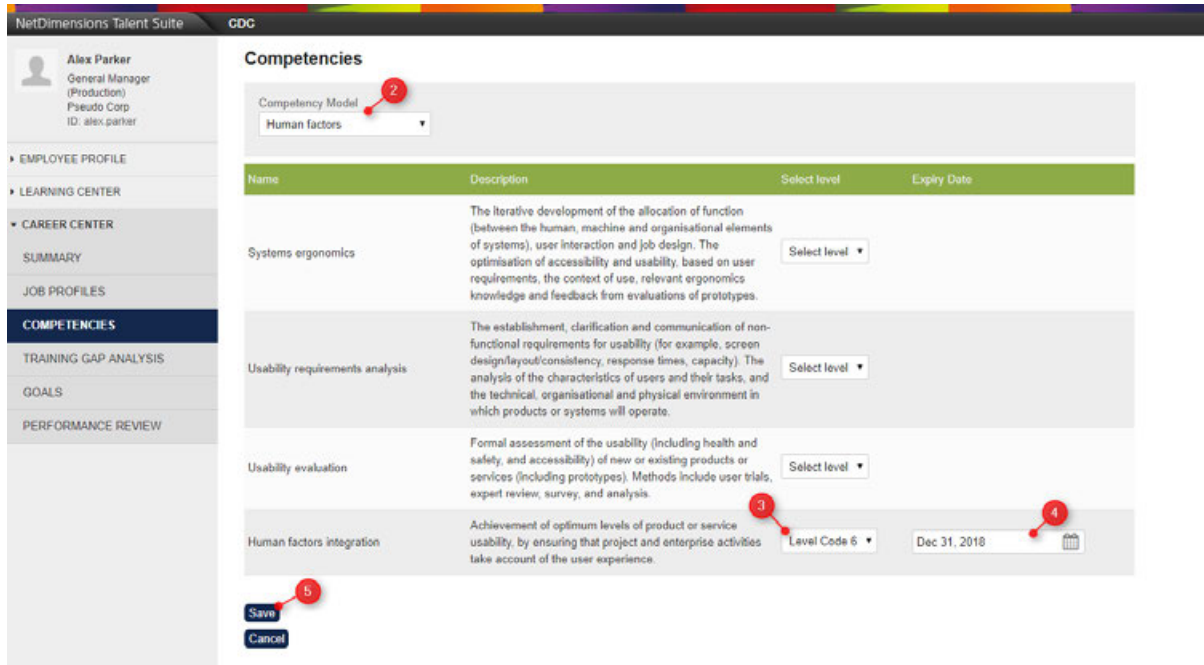
Assessment Name	Date Signed Off
360 Assessment 2017	Nov 29, 2017 3:09 PM CST

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

## Awarding Competencies

### To award competencies

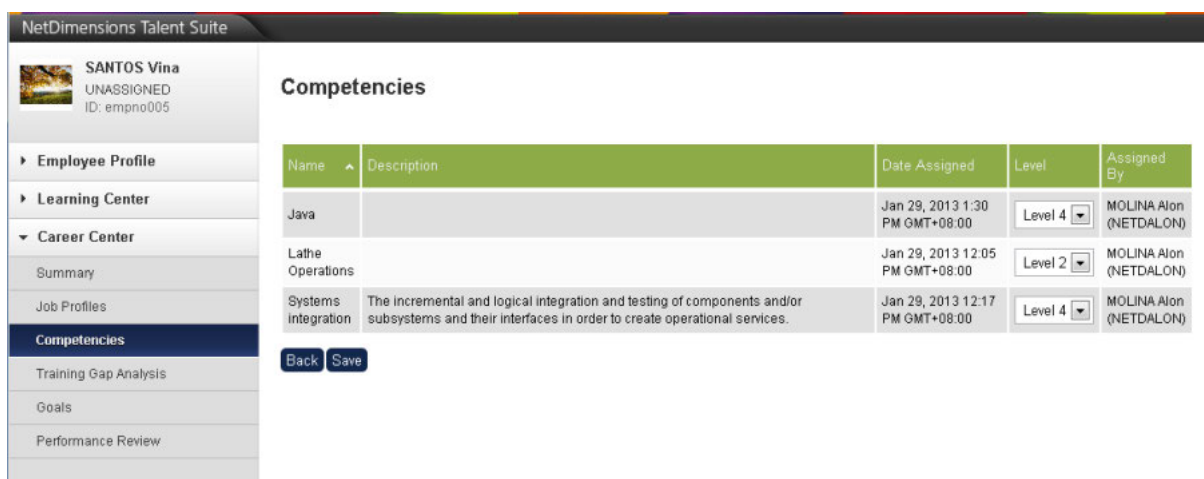
1. Click Award Competency
2. Filter by Competency Model
3. Select the Proficiency Level to award
4. Enter expiry date if applicable
5. Save



### Updating the Proficiency Level

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

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



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

NetDimensions Talent Suite

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

### Competencies

1 Proficiency Level is updated

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

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

### Viewing the Competency Detail

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

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

The screenshot displays the 'Managing A Team' competency page in the NetDimensions Talent Suite. The page is divided into several sections: Employee Profile, Career Center, Competency Details, Acquisition Method, Proficiency Levels, and Learning Modules.

**Employee Profile:** Barry Singer, Production Manager (UK), United Kingdom, ID: barry.singer.

**Competency Details:**

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

**Acquisition Method:**

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

**Proficiency Levels:**

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

**Learning Modules:**

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

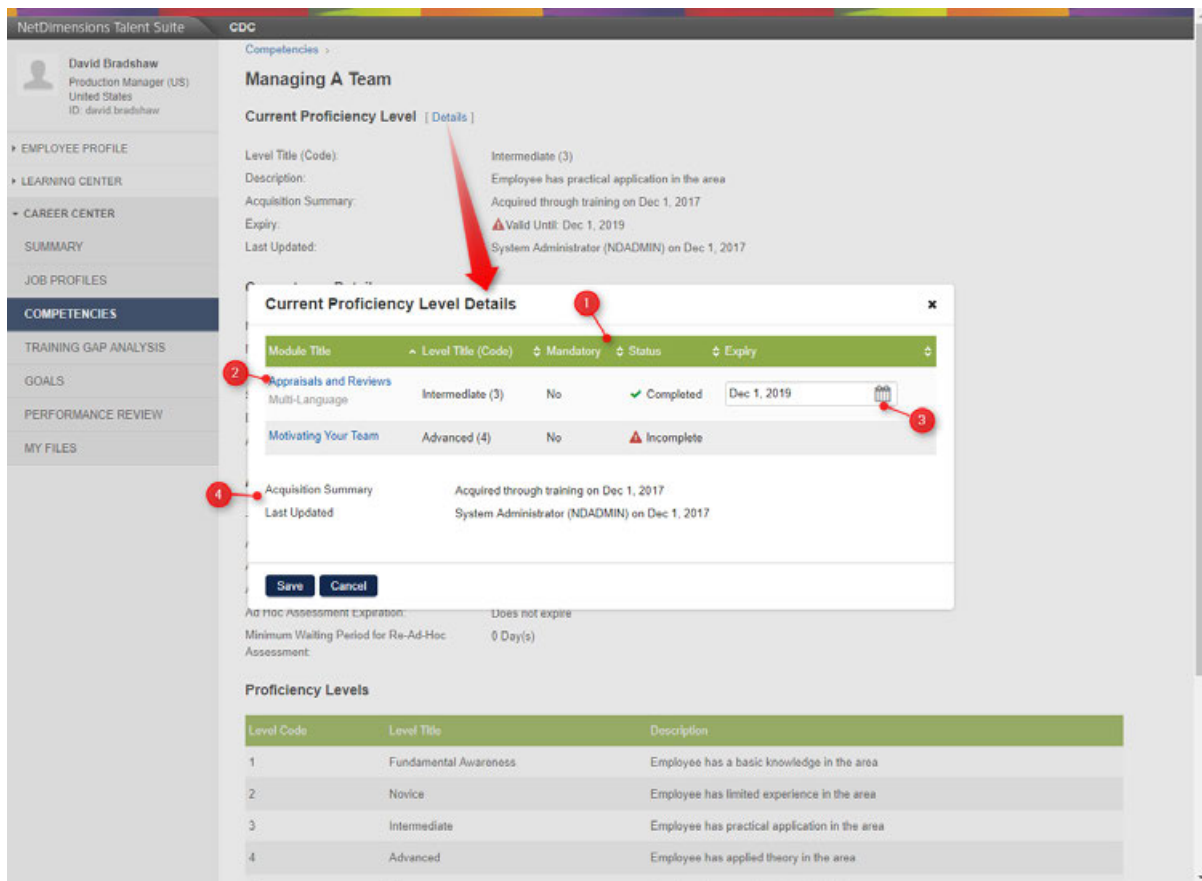
Module Title	Mandatory
Appraisals and Reviews Multi-Language	Required
Motivating Your Team Multi-Language	Required

[Back](#)

### Current Proficiency Level Details

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

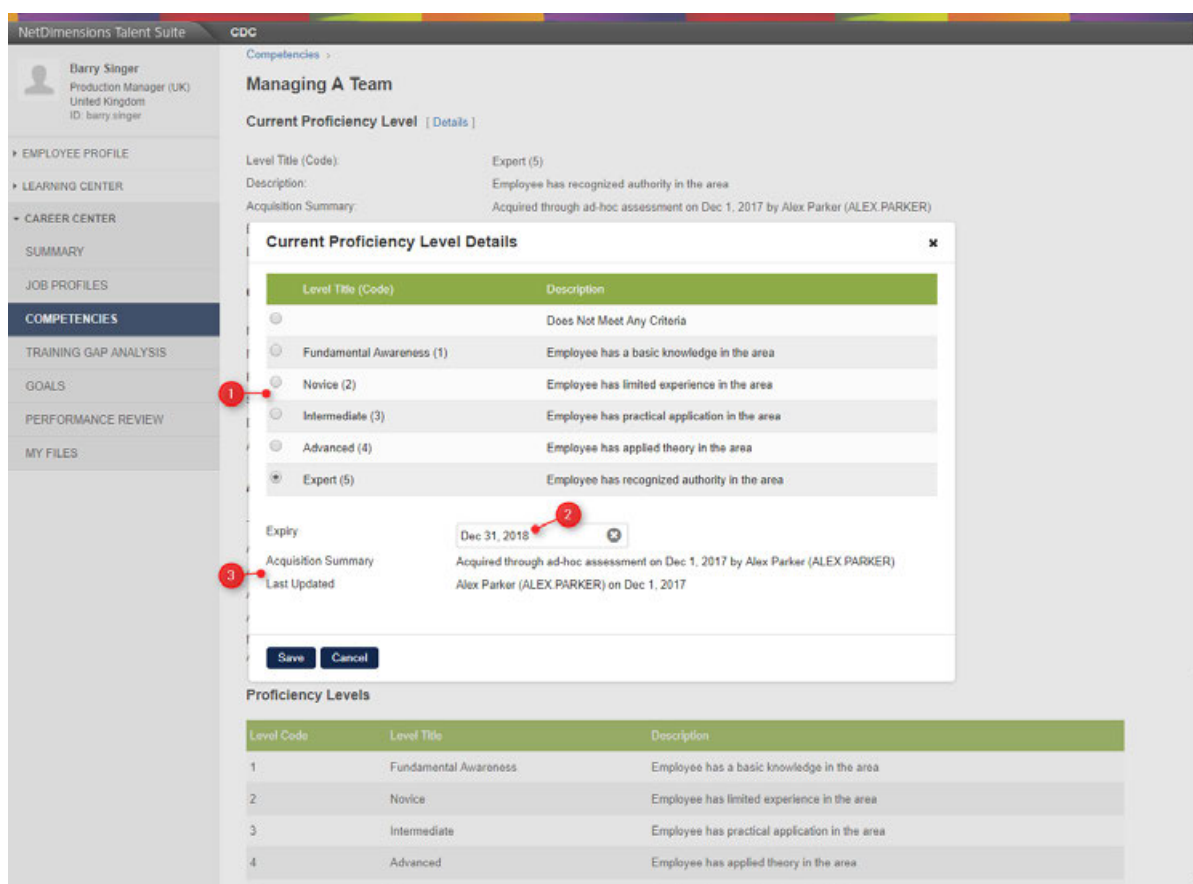
1. A summary of the competency modules including a status
2. Link to Module Catalog Page
3. With appropriate access controls, modify the expiry date against a given module completion
4. Acquisition summary and last updated information



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

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





## Training Gap Analysis

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

### Viewing the Training Gap Analysis

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

From here users can:

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

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

### Training Gap Analysis

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

Filter Gap Courses by Job Profile  
Fire Safety Officer

Title	Action
Program P1	---

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

## Goals

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

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

### Note:

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

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

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

**NetDimensions Talent Suite**

**SANTOS Vina**  
UNASSIGNED  
ID: empno005

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

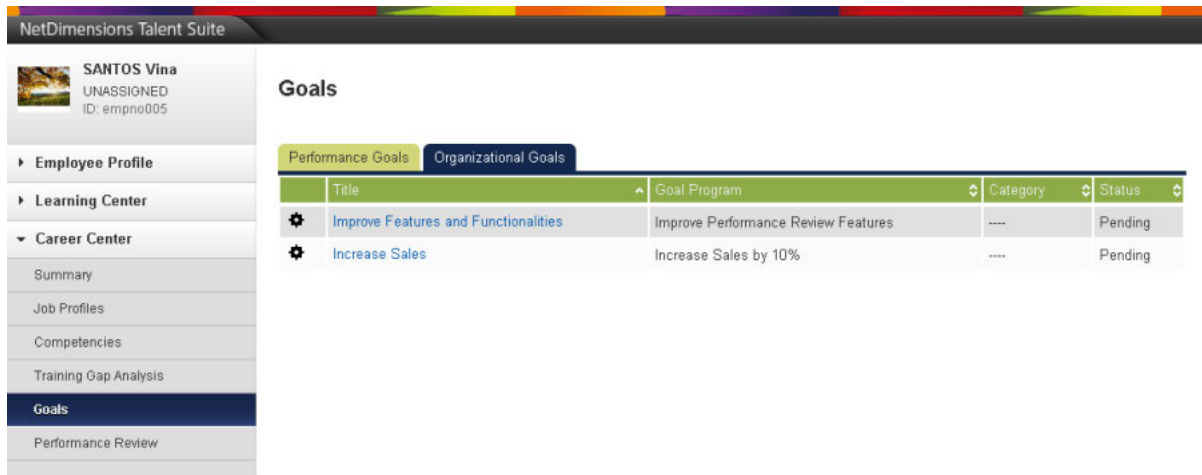
### Goals

Performance Goals | Organizational Goals

Bulk Action

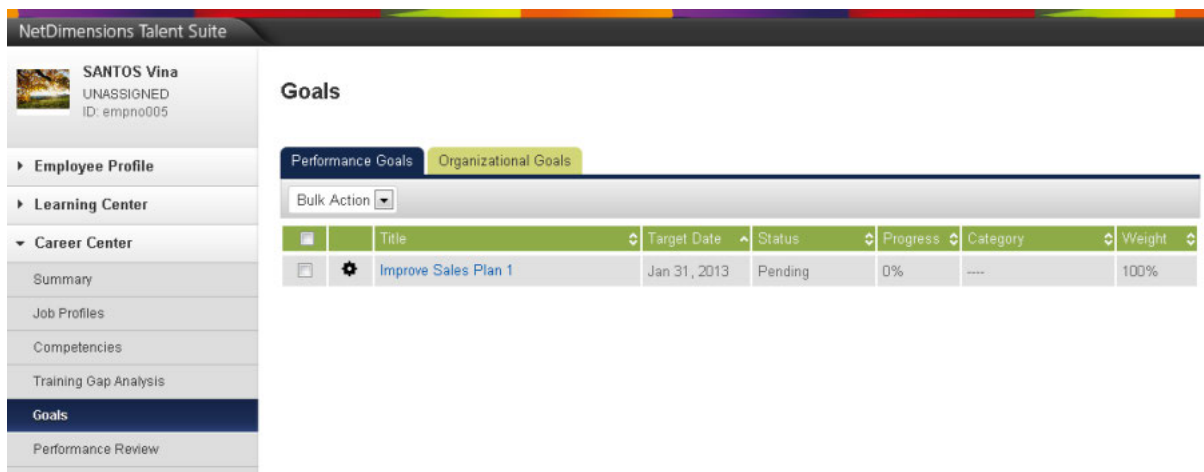
	Title	Target Date	Status	Progress	Category	Weight
	Improve Sales Plan 1	Jan 31, 2013	Pending	0%	---	100%

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

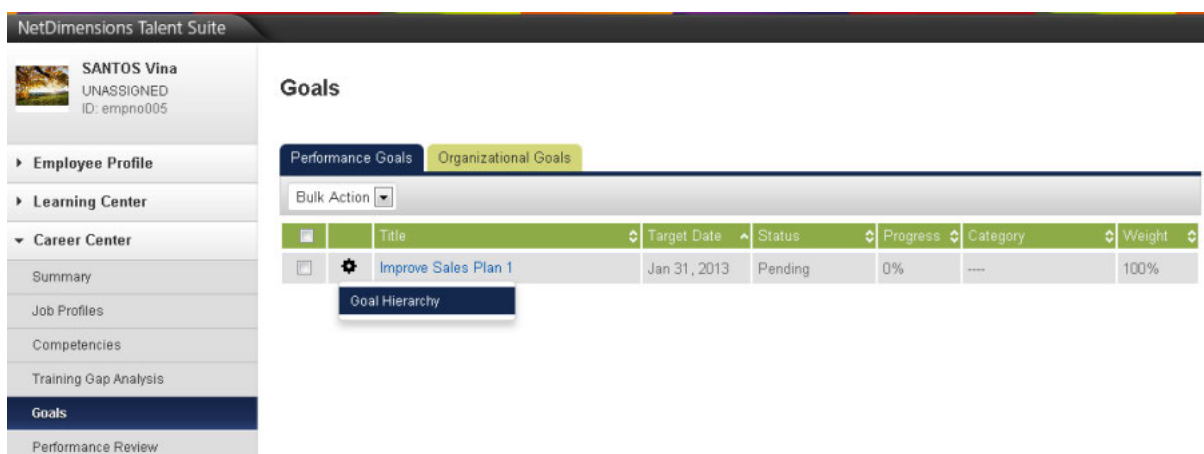


### Viewing Performance Goal Hierarchy

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



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



The screen displays the goal hierarchy

The screenshot shows the NetDimensions Talent Suite interface. At the top, the header reads "NetDimensions Talent Suite". On the left, a sidebar identifies the user as "SANTOS Vina", "UNASSIGNED", with ID "empno005". The sidebar menu includes "Employee Profile", "Learning Center", "Career Center", "Summary", "Job Profiles", "Competencies", "Training Gap Analysis", "Goals" (highlighted), and "Performance Review". The main content area is titled "Goals" and features a hierarchical diagram with two goal boxes: "Increase Sales" at the top and "Improve Sales Plan 1" below it, connected by a vertical line. A tooltip for "Increase Sales" is displayed, showing it is an "Organizational Goal" in the "Sales" category, owned by "SANTOS Vina". A "Back" button is located at the bottom left of the goal diagram. In the top right corner, there is a link that says "Switch to Detailed View".

## Performance Goals

(Available for Performance only)

### Creating and Linking Performance Goals

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

1. From here enter the performance goals details:

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

### New Performance Goal

**DETAILS**

Title\*

Weight\*  %

Description (Maximum 2000 characters)

Start Date\*

Target Date\*

Measurement and Milestones

Date Closed

**LINKED ORGANIZATIONAL GOAL**

**NOTIFICATION SETTINGS**

**Completion Reminders**

Send completion reminder Once ▼ to Owner   day(s) before Target Date

Send completion reminder Once ▼ to Owner's Direct Appraiser   day(s) before Target Date

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

organizational goal:

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

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

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

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

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

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

## Select an organizational goal

Organizational Goals	Category
⚙️ ⌕ Donaudampfschiffahrtsgesellschaftskapitän	Financial
Link Goal [unclear] by 15%	Financial
⚙️ ⌕ Reduce Operating Costs	Financial
⚙️ ⌕ Minimise Debt	Financial
⚙️ ⌕ Efficient Billings	Financial

Click the **Save** button.

### Updating Goals

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

The dialogue requires the user to enter the following parameters:

- Progress Detail
- Progress Date
- Progress
- Status

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

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

### Unlinking Goals

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

The performance goal will be unlinked to the organizational goal:

The screenshot shows a web interface for managing performance goals. At the top, there is a 'Date Closed' field with a calendar icon. Below this is a section titled 'LINKED ORGANIZATIONAL GOAL' which contains two buttons: 'Link Goal' and 'Unlink Goal'. These buttons are enclosed in a red rectangular box. Underneath is a 'NOTIFICATION SETTINGS' section with two rows of checkboxes and dropdown menus for 'Send completion reminder' to the 'Owner' and 'Owner's Direct Appraiser', both set to 'Once' and 'day(s) before Target Date'. At the bottom of the form are 'Save' and 'Cancel' buttons.

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

### Deleting Goals

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

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

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

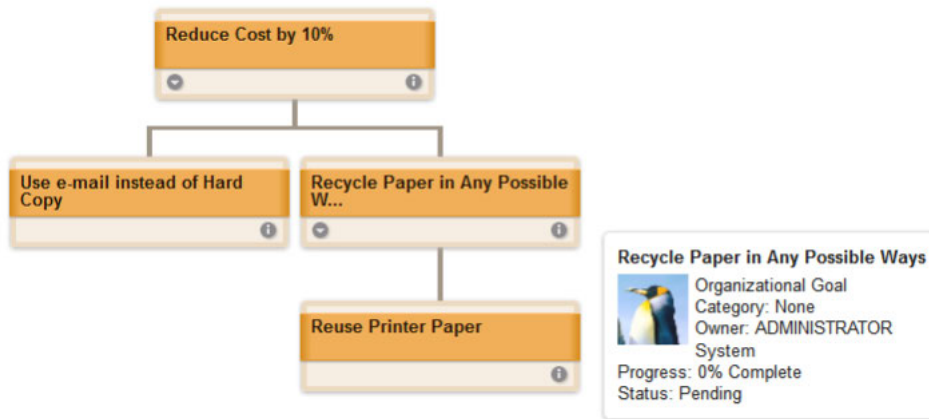
### Viewing the Organization Goal Hierarchy Graph

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



### View Hierarchy

[Switch to Detailed View](#)



[Back](#)

You can switch between two views:

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

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

