GENESYS™

Performance DNA Administrator Guide

Performance DNA 9.0

12/31/2021

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Performance DNA Administration Guide

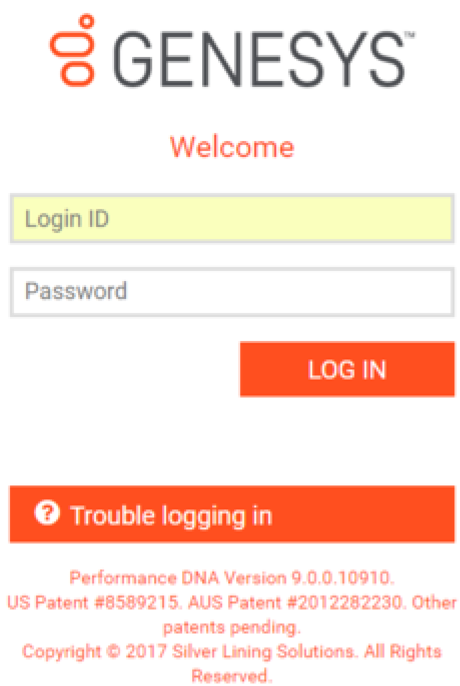
This manual describes how administrators use Performance DNA. Some of the topics contained in this guide include the following:

- Defining and managing roles
- Managing Assessments
- Managing learning items
- Creating certificates
- Managing and viewing Crystal reports
- Creating Skills DNA
- Using the Personal Development Review (PDR) feature

Logging In

Performance DNA is accessed through a web browser, pointing at a site either on the Internet (externally hosted) or over an internal company intranet (installed ‘on-premise’ at a site managed by the user’s organization).

Once the landing page is reached, a login screen similar to the one shown below will be displayed. (The application can be customized so that your organization’s branding standards, including logo and color scheme, are used.)



Enter your unique user name and password, and click the **Log In** button.

Note: Depending on the configuration of the installation, you might not need to enter your login credentials to access Performance DNA (for example if Active Directory authentication has been enabled). Your trainer will guide you on the login rules for your organization.

A user logging in as an Administrator usually has full access to Performance DNA. The home screen will look different depending on permissions assigned. A home page screen is shown below.

The left side of the screen always includes an expandable navigation menu. In the above example the My Development page is displayed (this will only be visible to users with the permissions to view the My Development page within Performance DNA). The widgets displayed in the menu are based on the user’s role as well as the available product licenses.

Manage Hierarchy

The Users & Hierarchy page shows the organizational structure that has been set up within Performance DNA. This hierarchy includes positions, users and the manager-subordinate relationships between individuals. Multiple users can be assigned to the same position.

Note: If the hierarchy will be managed and maintained by importing data or through integration with an existing HR system, the following section can be skipped as any manual changes made to the hierarchy will be lost the next time that the hierarchy is refreshed.

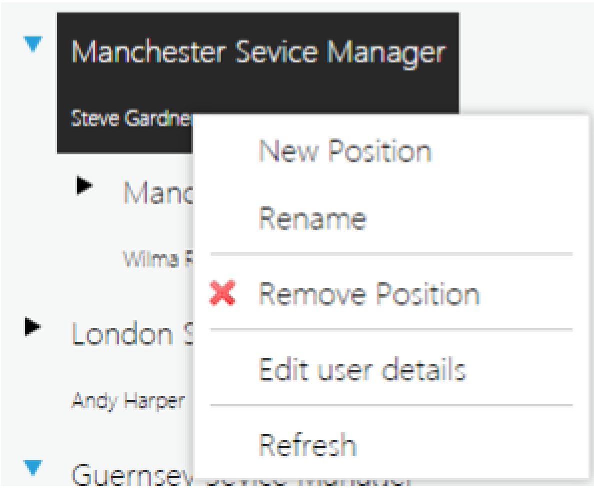
Managing Organizational Structure in Performance DNA

Select the **Users & Hierarchy** option from the menu to create and manage the hierarchy. The hierarchy structure automatically gives visibility of any subordinate assessment results in the **Report** page.

Positions are created and inserted into the hierarchy by right-clicking and creating a new position and dragging it under the existing position in the hierarchy.

Note: The top position in the hierarchy cannot be deleted.

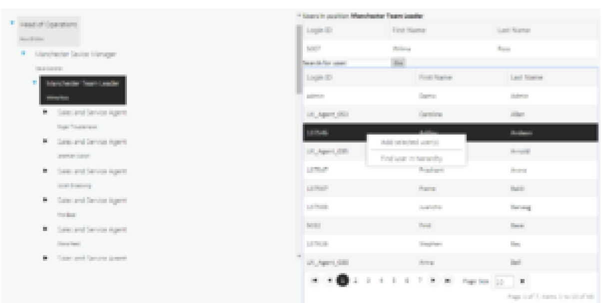
To create a new position, right-click a position in the hierarchy and select **New Position**.



The position will then appear in the hierarchy.

Right-click the new position to give it a unique name by clicking on the **Rename** option.

To assign a user to the new position first highlight the position. Next, right-click the user and select **Add Selected User**. This will assign the individual to the new position.



The hierarchy is usually created prior to receiving the application; however, this will have to be maintained.

To manually maintain the hierarchy:

Create new users manually (see next page for instructions) and then assign them to the relevant position.

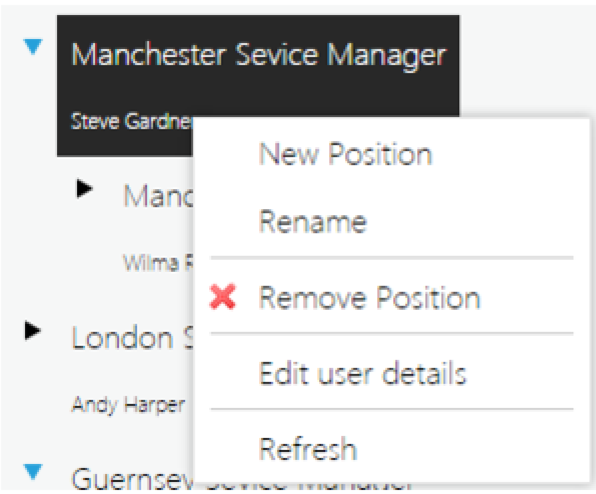
Amend any position changes manually and then the users assigned to the positions.

See Hierarchy Import Functionality for information on how to maintain the hierarchy by importing hierarchy data from a file.

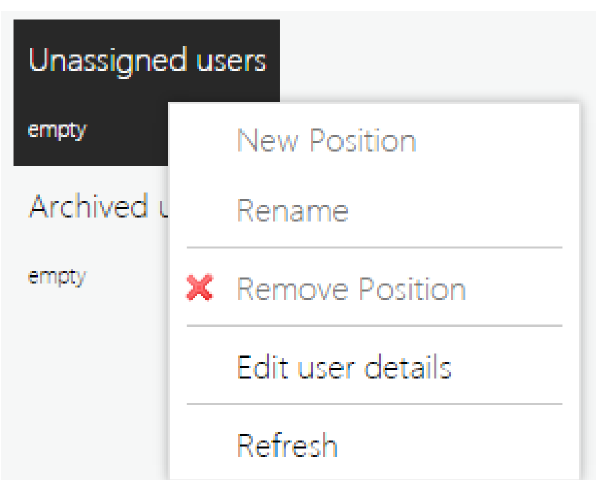
Creating and Managing Users

If the hierarchy is maintained through integration into a HR system or by importing data, there will be no requirement to manually make any changes as this will be managed automatically.

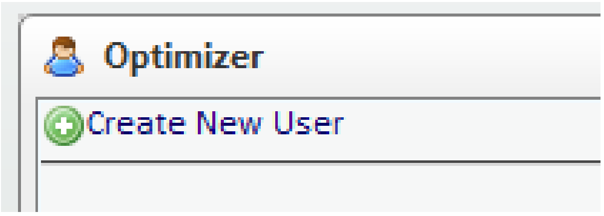
There are two options when creating a new user. To create a new user to assign to a new position, first create the new position and then right-click and select **Edit user details**. This will allow you to create a new user and automatically assign them to the position.



To create a new user to assign to an existing position, first right-click the position you wish to assign the user to, and select **Edit user details**.

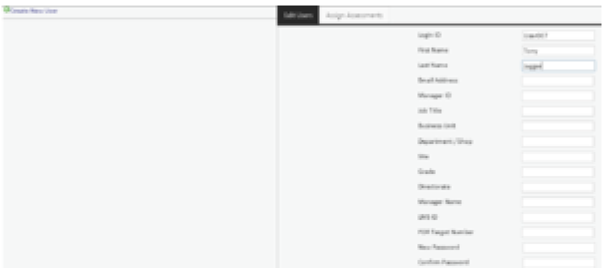


Click **Create New User**.



A template will be presented similar to the example below (the field names will vary based on your organization’s field names).

Enter the information as required and select **Create** to save the new user details.



The newly created user will then be assigned to the position.

You can also archive and forget a user. See the next topic Archiving and Forgetting Users for more information.

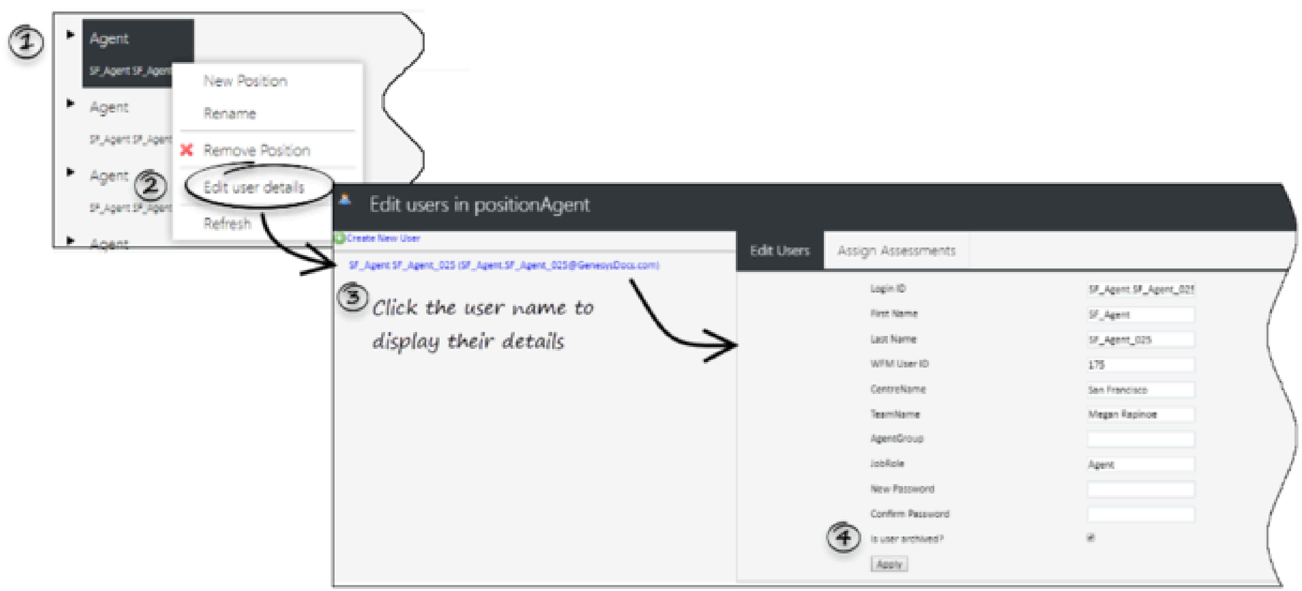
Archiving and Forgetting Users

Performance DNA allows you to archive and forget users that no longer use the system. You can do this from the **Users & Hierarchy** page.

How to archive a user?

To archive a user:

- Open the **Users & Hierarchy** page, navigate to the user name you want to archive, and edit the user details.
- On the **Edit users** page, click the user name to display their details and then select the **Is user archived?** check box. Clicking **Apply** will archive the user and move the user to the **Archived users** list on the hierarchy page.



> **Important**
> If you want to restore a user from the archived list, navigate to **Archived users** > **Edit user details**, click the user name and clear the **Is user archived?** check box. You can find the restored user in the **Unassigned users** list.

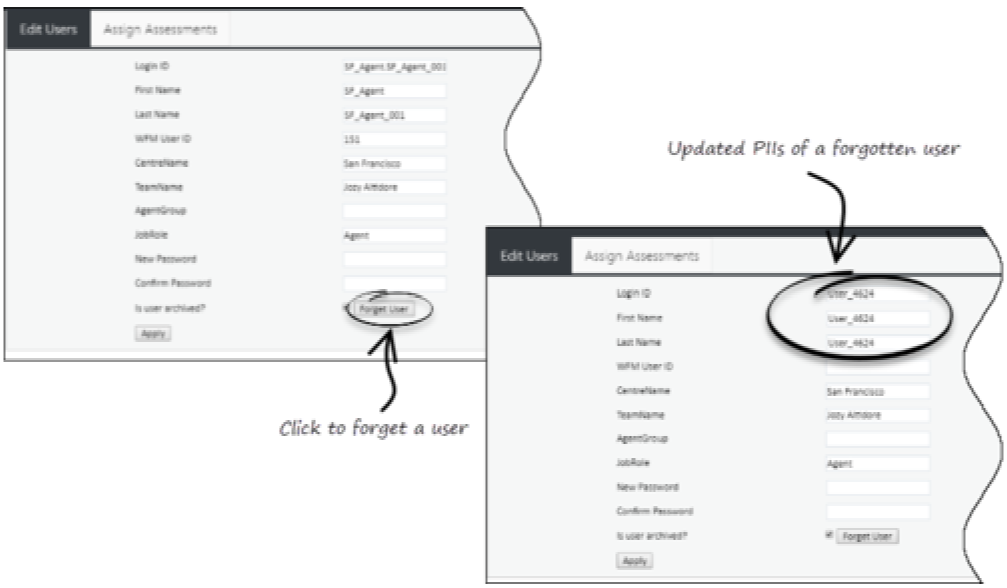
How to forget a user?

You can forget an archived user either manually or automatically by turning on the Forget archived user event in System Settings.

Forgetting a user manually

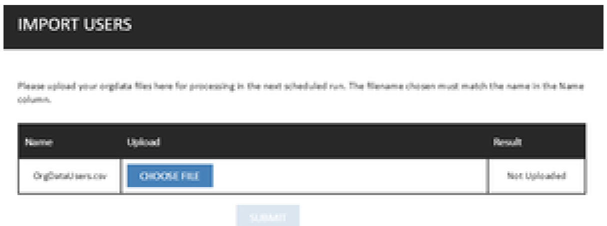
You can manually forget a user either by editing the user details from the **Archived users** list or while you are archiving a user.

To forget a user, click **Forget User** button from the **Edit user details** page. Once the user is forgotten, all their personally identifiable fields will be updated with random or anonymous data.



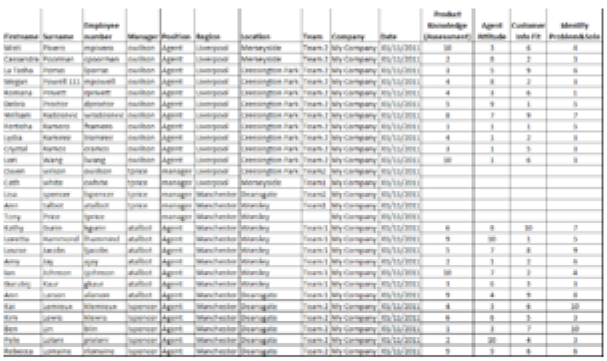
Hierarchy Import Functionality

Organizations can upload files containing their organizational hierarchy to be processed as part of the **OrgData Import** using the **Import Users** page.



The screen will provide an upload control for each file specified in the import configuration file. These should all be .CSV files.

The following shows an example hierarchy. In this example, Tony Price is the manager at the top level. The format of the file must match that specified in the OrgData configuration for it to be processed correctly.



Choose each of the files that need to be updated and then click **Submit**.

Once the files have been uploaded they will be processed as part of the next configured **OrgData** run and the user hierarchy will be updated.

Notes:

- If you are managing Training Manager users through Performance DNA, ensure that you have first created and mapped the Portal Employee ID Field mapping in Performance DNA -> System Settings -> General Settings tab.
- Portal users may only have one Portal role at a time. Users who have been assigned to the Portal Trainer role cannot become Portal Managers and vice versa.
- Users who have the Portal administrator role and any other Portal role will be treated as Portal administrators only.
- **OrgData** deletes the file specified after it has been imported.

For more information please refer to the **OrgData** documentation.

Managing User Permissions

User permissions – which features, functionality, and areas of the system a user has access to are defined in the **Roles & Widgets** page.

In the following example there are five default Performance DNA Roles and four default Portal roles (Note: if the hierarchy is maintained via the import hierarchy feature, all users with subordinates will automatically be assigned to both the Manager and User Roles). The Portal roles will only appear if you have set up both products and the host name for Performance DNA and Training Manager match.

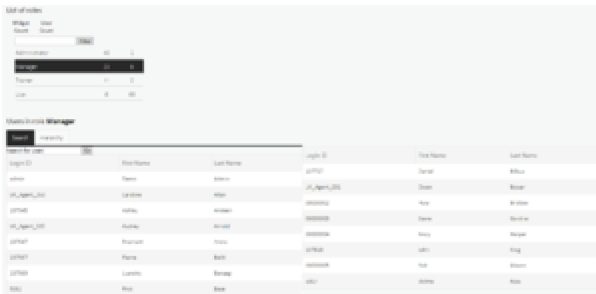
The number of users and widgets (features and pages accessible to a role) associated to the Role is visible under **User Count** and **Widget Count**.

	Widget Count	User Count
Administrator	16	1
Manager	0	0
Portal Administrator	15	0
Portal Manager	10	0
Portal Trainer	9	0
Portal User	3	0
Reporting Adminis...	0	0
Trainer	0	0
User	4	1

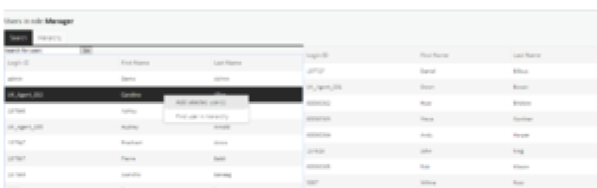
Defining and Managing Roles

The following section demonstrates how to create and manage a role. The Manager role is used as an example.

First, select a Role by clicking on the name of the role to view the list of users in the role.

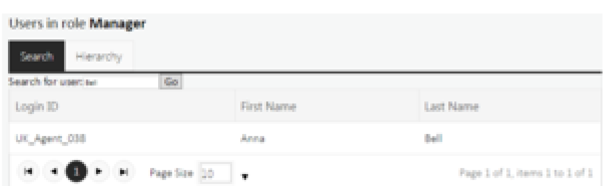


Additional users can be assigned to the selected Role by selecting the user(s), right-clicking on the individual in the user selection window and then selecting **Add selected user(s).** Once the user has been assigned they will appear in the **Users in role** window.



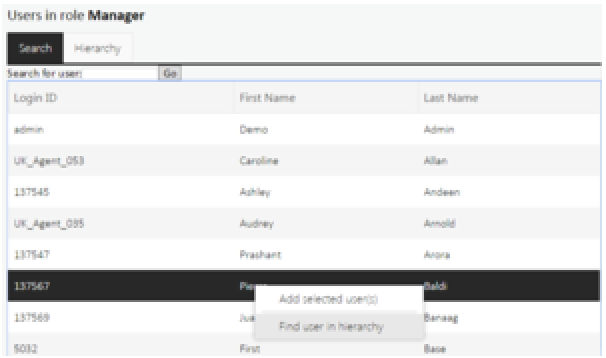
There is also a search utility to quickly select the individual rather than manually scrolling to select users.

To use the search utility, select **Search**, enter the First Name, Last Name, or LoginID of the individual to be selected in the search box, and then click **Go**.

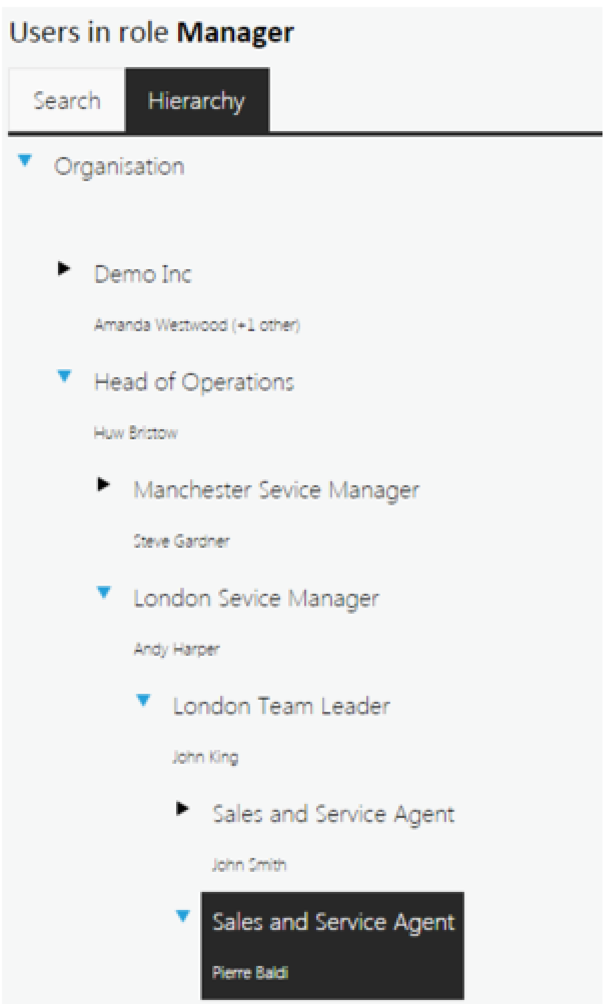


A list of matching individuals will then be presented to select from.

There is also the option to search for an individual user in the hierarchy. Right click the individual in the bottom window and select **Find user in hierarchy**.



The User name and Position will be visible in the bottom right hand side window, as shown in the following example.



The roles and widgets page is also used for managing Portal users and their roles. There are four inbuilt Portal roles: Portal Administrator, Portal Manager, Portal Trainer and Portal User. Adding users to these roles will grant them access to the related Portal features. Their position in the hierarchy is also used for Portal Managers to see their Portal Agents.

Note:

- Portal users may only have one Portal role at a time. Users who have been assigned to the Portal Trainer role cannot become Portal Managers and vice versa.
- Users who have the Portal administrator role and any other Portal role will be treated as Portal administrators only.
- Any changes to Locations in Training Manager will be overwritten using the locations setup in Performance DNA.
- Changing a user's role from Portal Trainer to Portal Manager (and vice versa) is not supported. Changing a user's role in this way will result in Performance DNA temporarily displaying that the change has been successful, however, the role change has not been saved.

Built-In Roles

The system has the following built-in roles:

- **Administrator** can see all users regardless of where they sit in the hierarchy, and has initial access to many widgets. The “Roles and Widgets” widget and the Tenant Administrator user cannot be removed from the Administrator role.
- **Manager** is a role for managers. If there are any widgets that you wish managers to see, you can add it to this group.
- **Reporting Admin** can see all users regardless of where they sit in the hierarchy.
- **Trainer** is a role for trainers. Users in the trainer role can be configured to appear for selection before an assessment is taken.
- **User** is a default role for basic users of the system.

The following roles are only available if you have a Training Manager license, and currently provide a fixed list of widgets. Portal Administrators, Trainers and Manager can also create booking requests.

- **Portal Administrator** gives access to various calendars as well as some Portal system administration widgets.
- **Portal Manager** gives access to various calendars, plus allows managers to set their working time.
- **Portal Trainer** gives access to various calendars, plus allows trainers to set their working time.
- **Portal User** allows agents to view their upcoming training/meeting events, and view the training roadmap.

Creating Templates Associated to Roles

To create a template for individual Roles you first need to understand which Pages are potentially available for the user to access, and their associated features and functions:

Pages

The following pages are available:

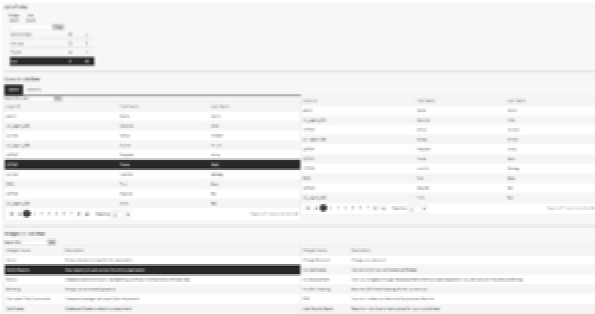
- **About** – Displays the about screen for the application, information such as application version, etc.
- **Admin Reports –** The 3 standard administrator reports installed by default are the following:
    - **User Result Detail** – User assessment results, with ability to drill down to question level and the option to export the data.
    - **User Feedback Response Percentages** – User feedback response results, reported as the percentage of users who selected specific responses.
    - **Question Response Summary** – Overall summary, by assessment, at question or criteria level, or percentage of users who selected specific answers or ratings
- **Branding –** Application branding settings, including color scheme, font size and logo.
- **User Field Mapping** – Control which user fields can be used for filtering DNA data.
- **Feedback Deployment Model** – Feedback model management – control who can access a user’s feedback assessment, for example, **Self & Manager**, **Self, Manager & Peers** etc. A **feedback assessment** is created using one of the feedback models once it has been assigned to a user and it will automatically assign the assessment to the next user in the **model** such as manager or peer.
- **Feedback Results Report** – Individuals or combination, (for example manager and individual/self) ratings by specific/selected criteria.
- **Import Users** – Import user details and Hierarchy.
- **Manage KPI Data** –Manage KPI data to be used within DNA and SkillsAnalysis.
- **Knowledge Nudge Report** –Knowledge Nudges time and usage results – when, and how long, a user accessed a knowledge nudge. Knowledge nudges are reading material or other information associated with specific assessments. A user may have access to the knowledge nudge prior to taking the assessment.
- **Licensing** – Performance DNA license information, including the number of licenses and expiry date.
- **Assessments** – Create, modify, import, export and assign assessments.
- **Certificates** – Create certificates to associate with assessments.
- **DNA Sequencer** – Create and edit DNA Strands / Sequences (combinations of measurable metrics within a job role), representing Job Roles and/or components of those roles.
- **Base Data Definitions** – Create and manage DNA Base Data (KPIs and assessment scores that are part of a DNA Strand).
- **Groups** – Groups of users that are assigned specific assessments.

- **Roles and Widgets** – Define permissions and system feature/function access for users.
- **System Settings** – Create user fields and field mappings (including login field) for all users.
- **Users & Hierarchy** – Organizational structure and user data. The hierarchy defines the structure within the organization - for example positions and associated users. The hierarchy defines reporting visibility - for example, it defines which users User X can see in a report.
- **My Development** – Employee visibility and access to any assigned assessments.
- **Reset Tests** – Reset User Tests.
- **Skills Analysis** –Correlation analysis of KPI data and assessment results used to identify the skills that are driving performance.
- **SkillsRoute** – Updates employee skills and associated skills data in Genesys via excel spreadsheet file transfer.
- **Top DNA Agents** – View employee performance rankings and compare employee performance across an organization or at other levels as selected/desired.
- **Update Routing Skills** – Link routing Skills to DNA, to allow updating of Skill data from Performance DNA to Genesys.
- **User Results Report** – User assessment results at individual or manager level, for individual, team, group, site or other filtered criteria. Note: Non-managers can only view their own user results.
- **View Filtered DNA** – View DNA across your organization, filtered in various ways.
- **My Certificates** – View and print individual completed certificates.
- **My DNA Mapping** – Show the DNA mappings for the selected user.
- **Messaging Log** – Show logs produced by the Performance DNA Email Notification Service
- **Trend Graph** – Show changes in individual/team DNA data over selected date range.
- **Change Password** – Change password
- **Learning Items** – Create and edit Learning items
- **Manage Import templates** – Manage the list of import templates used for importing KPI data
- **Manage Knowledge Nudges** – Create and manage Knowledge Nudges. Knowledge Nudges are reading material or other information associated with specific assessments. A user may have access to the Knowledge Nudge prior to taking the assessment.
- **Manage Reports** – Upload, edit and delete Crystal reports
- **Report Categories** – Manage Crystal report categories
- **User Selections** – Manage DNA User Selections that can be used in other pages, for example The Trend Graph
- **View Reports** – View Crystal reports

Portal widgets may also be available if you have applied a Portal license.

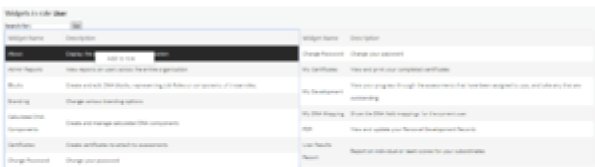
Once you have identified which pages are required to be accessed for which role, they can then be associated to that role.

To associate pages to a role, first select the role from the **List of roles** and then click the **Widgets** tab in the selection box (Widgets are the Page names).

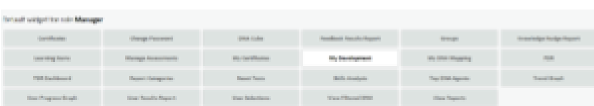


Right click the required widget and select **Add to role**.

Users can create their own tabs and associate the widgets, or create pre-defined templates by role (see next section).



It is possible to set the default page for individual roles by selecting a role and then choosing one of the available widgets for the role from the **Default widget for role** section located at the bottom of the **Roles & Widgets** page. The default widget will be the page or feature that opens automatically when the user logs in to the system.

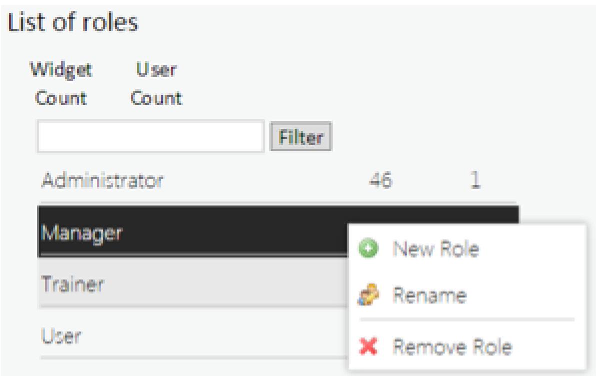


Create New Roles

To create a new Role, right-click an existing role and select **New Role**. There is also the option to **Rename** the role or **Remove the Role**.

Once the new Role has been created, users and widgets can then be associated and a template containing the pages can be created.

Note: Trainers must be assigned to the trainer role so that they are listed in the assessment trainer selection screen.



System Settings

The **User Fields**, **Field Mappings** and customized **Widgets** are found on the **System Settings** page.

User Fields

The user fields are the fields which contain the mandatory Login ID, Last Name & First Name along with any other required or desired user information that can be used for filtering and viewing report and DNA data.

The LoginID (or whichever user field is being used for authentication) must be unique to the user and it must be a valid email format.

Additional user fields can be added by entering the desired field name and clicking the ‘+’ icon.

The order in which the user fields are displayed can be changed by using the up or down icons at the side of the specific user field.

If you wish to manage Training Manager/Portal users via Performance DNA, create a Portal Employee ID and Portal Username user field to support Performance DNA-Training Manager user mapping and specify this mapping in the General Settings tab (by specifying the appropriate field for the Portal Employee ID Field, Portal Username Field and Locations field options).

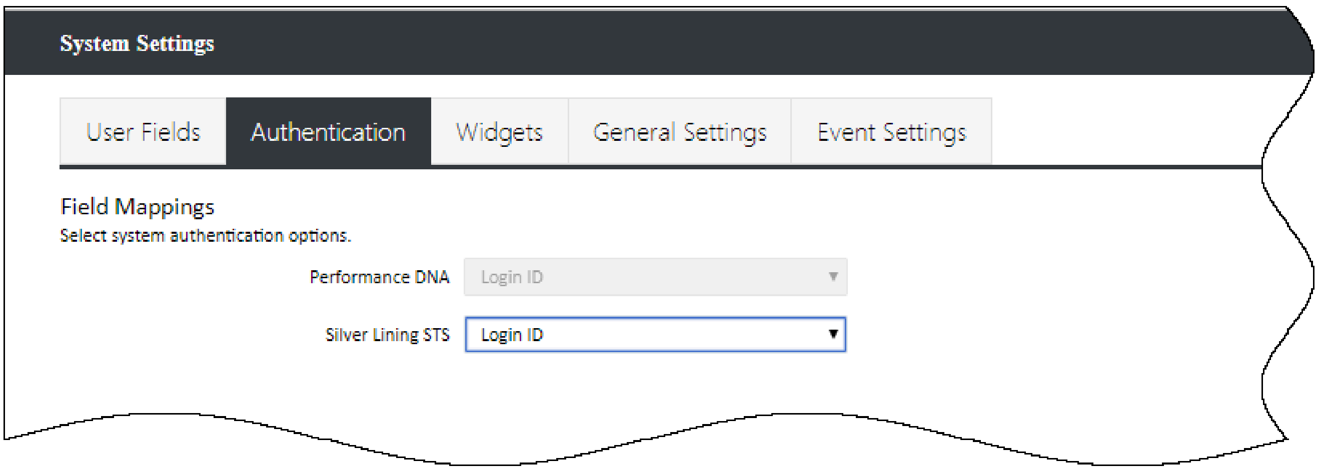
Authentication

The **Authentication** section contains configuration options relating to **Field Mappings** and **SAML Authentication**.

Field Mappings

Field Mappings are used to select which user field should be used to verify individual users when they log on to the system or access the APIs. The Performance DNA mapping is set on the upgrade or creation of the tenant and cannot be changed. The field that this is set to will require the value to be in an email format. In the example below, users will be required to provide their Login ID and their password to log in.

Secure Token Service (STS) is the method is used for active directory Single Sign On. Select the user field that contains the user's *Active Directory User Name* from the **Silver Lining STS** drop down.

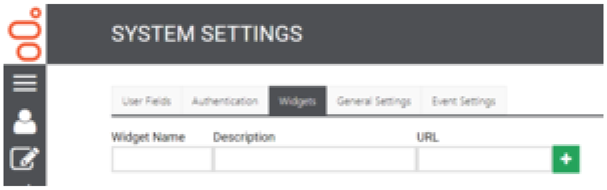


SAML Authentication

The **SAML Authentication** section allows the configuration of identity providers with Skills Management acting as a service provider. Skills Management supports service provider-initiated login for the top enabled IDP and IDP-initiated login for all enabled IDPs.

Widgets

The Widgets tab allows for external widgets (pages) to be accessed through Performance DNA. Enter the required information and the relevant URL to be able to access them.



General Settings

General settings include the following group of settings:

- Genesys Settings
- Proxy Settings
- Learning Management System Integration Settings
- Exchange Settings
- Email Settings
- WFM Settings
- Workflow Integration Settings
- Password Settings
- Predictive Routing Settings
- Other Settings

Genesys Settings

If you wish to enable GIS integration, tick the **Enable GIS** option. After checking this option, the following additional configuration fields will be available:

Username – The username to use when authenticating against GIS.

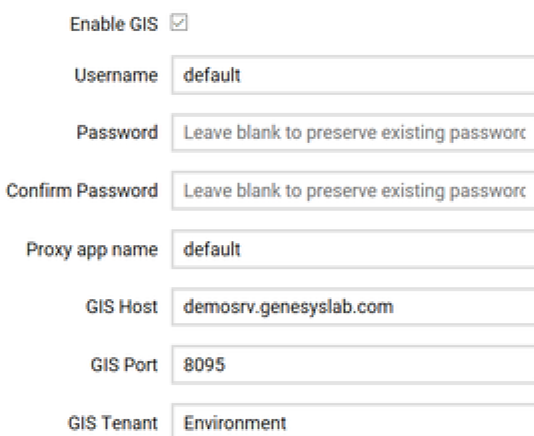
Password – The password to use when authenticating against GIS.

Proxy app name – The proxy application name.

GIS Host – The host name of the GIS instance.

GIS Port – The port on which the GIS instance is accessible.

GIS Tenant – The name of the GIS Tenant with which to integrate.



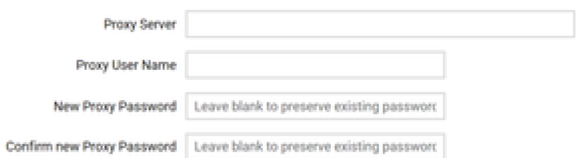
Proxy Settings

The proxy settings configure the proxy server to use when integrating with other systems. The use of a proxy can be enabled on a per-integration basis.

Proxy Server – The full URL of the proxy server, including port number. For example, *http://lmsproxy.domain.com:1234* or *https://192.168.123.45:7890*

Proxy User Name – The user name to use for the proxy if authentication is required.

Proxy Password – The password to use for the proxy if authentication is required.



Learning Management System Integration

If you wish to enable LMS integration, tick the **LMS Integration enabled** option. After checking this option, the following additional configuration fields will be available:

LMS Type – Select the required Learning Management System from the dropdown list.

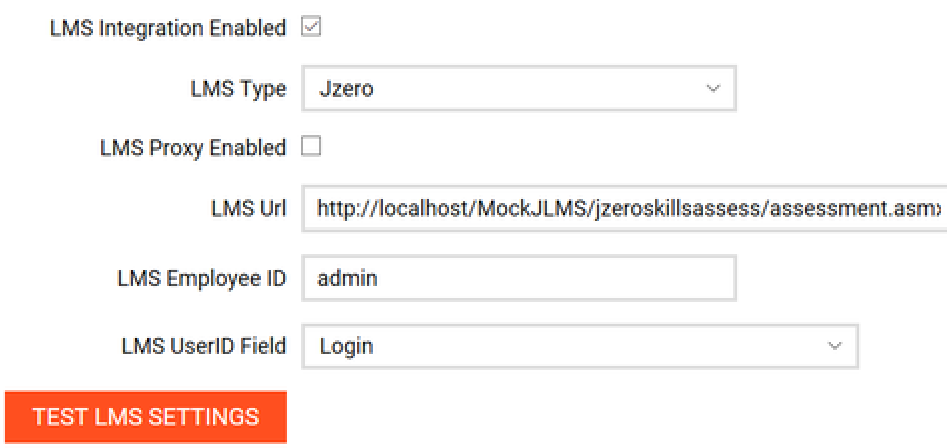
LMS Proxy Enabled – Whether to use the configured proxy settings for connecting to the LMS.

LMS Url – Enter the full URL, including http:// or https://, of the LMS.

LMS Employee ID – for Moodle / ScaffoldLMS based solutions enter the Webservice Token.

LMS UserID Field – Select the Performance DNA user field that contains the User's LMS UserID.

Test LMS Settings – Click the test button to validate the LMS settings and connection.



Exchange Settings

If you wish to enable Exchange integration (including Exchange Rooms), tick the **Exchange Integration enabled** option. After checking this option, the following additional configuration fields will be available:

Exchange Proxy Enabled – Whether to use the configured proxy settings for connecting to Exchange.

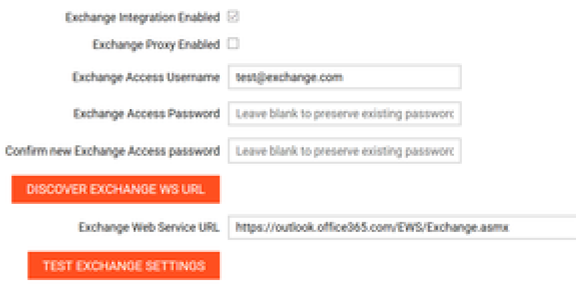
Exchange Access Username – The username of the account used to access Exchange.

Exchange Access Password – The password of the account used to access Exchange.

Discover Exchange WS URL – This button will attempt to autodiscover the URL of the Exchange Web Service.

Exchange Web Service URL – The URL of the Exchange Web Service. This can be manually entered if autodiscovery fails.

Test Exchange Settings – Validates the Exchange settings and connection.



Email Settings

Message Manager on Assessment Completion – Whether to message a user’s manager when that user completes an Assessment.

Email Field – The User Field containing a user’s email address.

From Address for Event Emails – The from email address that appears on event emails.

Sender Name for Event Emails – The sender name that appears on event emails.

SMTP Server – The SMTP Server name from which event emails are sent.

SMTP Port – The port over which the SMTP server is accessed.

Enable TLS for SMTP – Enables Transport Layer Security when accessing the SMTP server.

Use SMTP Default Credentials – If this is enabled then default credentials will be used to connect to the SMTP server. Otherwise the username and password must be provided.

SMTP Username – The username to use when accessing the SMTP server.

SMTP Password – The password to use when accessing the SMTP server.

Use Default Organizer – If this is enabled then the default organizer will be used for event emails.

WFM Settings

The following settings allow you to configure the WFM application details and they are configured in the **WFM Settings** section.

> **Important**
> The settings you configure here will vary depending on the WFM type. If a setting is specific to a WFM system, it is indicated by the WFM name in square brackets.

WFM User Name - The user name that Performance DNA must use to connect to WFM.

New WFM Password / Confirm WFM Password - The password for the specified WFM user. Leave blank unless you are updating the password.

WFM Type - A list of supported WFM software. You can select - **Genesys**, **Teleopti**, or **IEX**.

WFM HTTPS - If selected, HTTPS will be used when connecting to the WFM services.

WFM Server Host - The hostname (and optionally port) where the WFM service interface is located. If a specific TCP port is required, it should be separated from the name with a colon (:). Only provide the host name, and not any protocol, for example, demosrv:5007.

WFM Server Proxy - [Genesys WFM] The CS Proxy information for the WFM server.

WFM Ping Interval - The interval in minutes that is used to send a *keepalive* request to the WFM, only required during long-running requests.

WFM App Name - [Genesys WFM] The WFM Server application name.

WFM Customer Name - [IEX TotalView] The Customer Name that is being connected to WFM.

WFM ADG Team Name - [IEX TotalView] The Agent Data Group name that is used to provide the team name for an agent.

WFM ADG Email Name - [IEX TotalView] The Agent Data Group name that is used to provide the email address for an agent.

WFM Application Data Source - [Teleopti WFM] The name of the Data Source used if the WFM service should connect to Teleopti using an application username / password.

WFM Business Unit - [Teleopti WFM] The internal GUID of the Business unit being connected to. **Note:** Setting this option from Training Manager is easier.

WFM Windows Data Source - [Teleopti WFM] The name of the Data Source used if the WFM service should connect to Teleopti using the service's Windows credentials.

Treat Overtime as Interruptible (Teleopti WFM Only) - [Teleopti WFM] If selected, overtime is included in the schedule data retrieved from WFM, and is therefore included in the time checked when scheduling meetings and training sessions.

Workflow Integration Settings

The following settings are required to configure a Workflow Integration system and they are configured in the **Workflow Integration Settings** section.

Workflow Integration Enabled - Whether to enable integration with a Workflow Integration system. If this is enabled then the other Workflow Integration settings are visible.

Workflow Integration Proxy Enabled Whether to use the configured proxy when connecting to a Workflow Integration system.

Workflow Integration URL Endpoint - The full URL of the Workflow Integration Endpoint (for example, http://192.168.254.121:7610/Genesys/Interaction/PFS_WS_CP/WebServiceCapturePoint)

E-Routing Mode - Select the mode that the Workflow Integration Endpoint is using. You can select either **IWD** or **Native**.

Password Settings

For added security, you can set few parameters for the password. Navigate to `System Settings -> General Settings` tab and go to the **Password Settings** section. The table below explains the Password Settings parameters.

> **Important**
> After configuring these settings, Performance DNA or OrgData will check against these password rules whenever a password is created or edited.

<table>
<tr><th>Password Setting</th><th>Description</th></tr>
<tr><td>Minimum Password Length</td><td>This has a minimum value of 7. By default, passwords are set to require <code>10</code> characters. Any value entered must be a whole number.</td></tr>
<tr><td>Require an Uppercase, Lowercase, and Numeric character</td><td>This setting can be toggled on and off and requires at least one of each uppercase, lowercase, and numeric character. For example:
Valid: Myvalidpassword1
Invalid: myvalidpassword1 and Myvalidpassword</td></tr>
<tr><td>Includes a Special Character</td><td>This setting can be toggled on and off and enforces the use of at least one special character in the password. These include the following: !"#$%&'()+,-./:;<=>?@[]^_`{|}~*
Note that the first character is a space.</td></tr>
<tr><td>Maximum Consecutive Repeated Characters</td><td>This limits the number of characters that can be repeated consecutively. It defaults to 3 and must be a whole number. If using the default, the password aaabcd would be invalid.</td></tr>
<tr><td>Prevent Repeated Characters Making Up More Than Half of a Password</td><td>This setting can be toggled on and off and ensures that a single character does not make up more than half the password. For example, abacadaeafa would be invalid because the password is 11 characters long and includes 6 a's</td></tr>
<tr><td>Disallowed Passwords (; separated)</td><td>This setting contains a list of disallowed passwords, separated by semicolons. The defaults are as follows:
password - displays as <code>password</code>
p455w0rd - displays as <code>p455w0rd</code>
p@ssw0rd - displays as <code>p@ssw0rd</code></td></tr>
</table>

Password Setting	Description
	Note: You should not enter a password with a ; in the disallowed list; if you do, it will be treated as a separator.
After reset, user must change password on first login	By default, this option is enabled. Users who log in for the first time will be redirected to the Change Password screen. If a user logs in and does not provide a new password (for example the user cancels or closes the browser), the user can log back in and attempt to change the password again. There is no limit to the number of times a user can cancel.
Lockout Users After X Failed Attempts	The number of failed login attempts that triggers a locked account. For example, if the value is set to 6 and the user has failed to log in 5 times, on the 6th failed attempt, the account is automatically locked for the duration of time specified in the **Lockout Time Duration (Mins)** option (below). After a successful login, the failed login attempts counter is set back to 0. For example, if a user fails to log in 5 times but then successfully logs in on the 6th attempt, the failed login attempts counter returns to 0 and the user successfully logs in.
Lockout Time Duration (Mins)	The duration, in minutes, that an account is locked after the user has exceeded the number of login attempts specified in the **Lockout Users After X Failed Attempts** field. If a user tries to log in during this time period, a message appears onscreen, indicating that the account is locked.
Password Expiry Duration (Days)	The period of time (in days) that a password can be used before the system requires the user to change it.
User Cannot use the Same Password for X Number of Days	The period of time (in days) before an old password can be used again. If a user attempts to re-use an old password before the time specified in this field has lapsed, the user will be prompted to choose a different password.

Predictive Routing Settings

The following settings allow you to control the **Predictive Routing Data Loader** event and they are configured in the **Predictive Routing Settings** section.

Predictive Routing Base URL - The base URL used to connect to the Predictive Routing API (for example, http://10.90.10.156/api/v2.0/).

Predictive Routing API Key - The API key used to authenticate against the Predictive Routing API.

Predictive Routing Username - The user name used to connect to the Predictive Routing API.

Predictive Routing Password - The password used to connect to the Predictive Routing API.

Predictive Routing Frequency Multiplier - The number of units (below) used when retrieving data - can be a number from 1 to 6. For example, if you choose **2** and **Weeks** then the data retrieved will be from 2 weeks prior to the current week.

Predictive Routing Frequency Unit - The unit of time used when retrieving data that will be sent to Predictive Routing, it could be either Days, Weeks or Months.

Predictive Routing Agent ID Field - The user field in your system that is used to uniquely identify a user when sending the data to Predictive Routing.

Other Settings

The following additional settings are configured in the **General Settings** tab:

Analysis min data points - Enables the exclusion of low volume data points presented in SkillsAnalysis.

Correlation Period (Days) – The number of days' worth of data either side of a learning item being taken to use to analyze its impact.

Learning Item Impact Period (Days) – The number of days into the past to search when performing analysis of learning item impact.

Percentage Correlation Threshold for Learning Item Auto-Assignment – The correlation threshold above which learning items will be automatically assigned to users for whom the learning items are recommended based on their data scores.

Automatically assign learning items – Whether to automatically assign learning items when the correlation matches or exceeds the percentage correlation for learning item auto-assignment.

AICC Student ID Field – The User Field used to identify a user in the integrated LMS. Used only when integrating with a third-party LMS (Learning Management System).

AICC Suppress Put Param – Suppressed PUT parameters when communicating with the LMS over AICC.

CSV Extension – Specifies which extension should be used for exporting data to a file.

Pass text / Fail Text – Message that is presented back to the user on completion of an assessment.

Kite Diagram Enabled – Enables a one-off chart that is shown on completion of an assessment.

Assessment Defaults – Note: leave this selected as default.

Combined tests require signing with a password – Requires password input as part of completion of a combined manager/user feedback assessment that requires agreement between the two parties.

User Field for PDR target counts – the user field used to store the number of possible targets for users' PDR.

Performance DNA URL – The URL of the installed Performance DNA application.

Enable Third-Party Authentication – Whether to enable users to log in using custom third-party authentication.

Third-Party Authentication Login Page URL – The login page of the third-party authentication provider.

Third-Party Authentication Logout Page URL – The logout page of the third-party authentication provider.

User Field for Third Party Authentication – The user field to use when mapping users from the third-party system.

Portal Employee ID Field – The user field that is used to store Portal Employee IDs. This field must be set and all values must be unique to support Performance DNA-Training Manager user integration.

Portal Username Field – The user field that is used to store Portal usernames. This field must be set and all values must be unique to support Performance DNA-Training Manager user integration.

User Location Field – The user field that will hold Portal Manager and Trainer Locations. The locations can be delimited by using the character below.

User Location Delimiter – The single character delimiter used for the locations field.

OrgData Unique User Field – The user field that is used to uniquely identify a user while importing OrgData.

Number of days after which archived users are eligible for auto-anonymisation – Specifies the number of days after which an archived user's details will be automatically anonymised by the OrgData import process. This process ensures GDPR compliance of user's data.

Event Settings

The Event Settings tab contains settings and information about different types of configurable events. Events can be enabled/disabled and the interval between the events occurring can be modified in this tab. The events in this tab are described in the following sections.

Learning Items Assignment Email

This option is available on the **System Settings** > **Event Settings** tab. It allows you to set the frequency for processing notifications of the assignment of learning items. To enable it, select the **Enabled** check box for the **Learning Items Assignment Email** item. The **Interval in Minutes** setting specifies how frequently emails will be processed. Any learning item assignments that occur within the interval period will be combined into a single email per user. Note: This feature requires that certain other settings have been specified; including the email field (specified in the **General Settings** tab) and that users must have valid email addresses specified for this user field.

Assessment Completion Email

This option is available on the **System Settings** > **Event Settings** tab. It allows you to set the frequency for processing notifications of the completion of assessments. To enable it, select the **Enabled** check box for the **Assessment Completion Email** item.

The **Interval in Minutes** setting specifies how frequently emails will be processed. For each assessment that is completed within the interval period, an email will be sent to the manager(s) or trainer of the user who has completed the test.

Note: This feature requires that certain other settings have been specified; including the email field (specified in the **General Settings** tab) and that users must have valid email addresses specified for this user field. The email is only sent for normal assessments and “self” only assessments. Combined Feedback assessments have a different setting on the **System Settings** page. “Peer” assessments do not send emails.

Process Queued Booking Requests

This event processes a booking request queued through Skills Portal.

Process Email Queue

The event processes queued emails.

Process Learning Items Queue

This event processes the assignment of queued learning items.

Learning Item Auto Rank

This event generates automatic ranking numbers for links between learning items and user performance data and automatically assigns those which exceed the correlation threshold if learning item auto-assignment is enabled.

For any links that have been created between learning items and user performance data, this event finds instances of users taking the learning item within the impact period before the time of the event running. It then retrieves user data within the correlation period either side of these instances, performs a correlation and then assigns the correlation percentage to the auto rank value of the learning item.

If learning item auto-assignment is enabled, this event then proceeds to find users whose performance data scores for the impact period fall within the assignment ranges of linked learning items and assigns those learning items to matching users.

Process OrgData

This option is available on the **System Settings** > **Event Settings** tab. It allows you to set the frequency to run the OrgData process. To enable it, select the **Enabled** check box for the **Process OrgData** item. The **Interval in Minutes** setting specifies how frequently you want to run the **Process OrgData** event.

You can configure running the OrgData process either automatically or trigger manually.

There are various ways to set up OrgData within the system from the **Admin** > **Users** > **OrgData Setup** page. Refer to OrgData for more details on setting up OrgData.

HTTPS Support

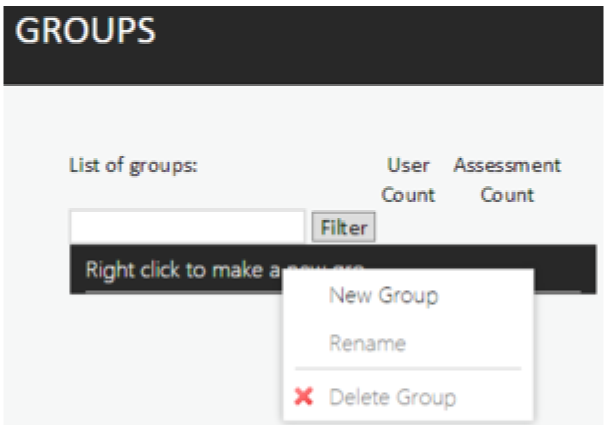
The services, sites and Training Manager client can be run in either HTTP or HTTPS.

Groups

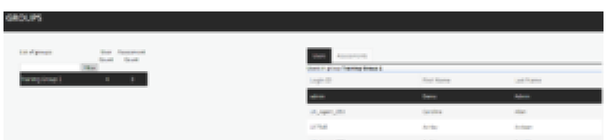
Groups are created for the purpose of managing multiple users who need to take the same assessment(s).

The **Groups** page will contain the names of any existing Groups along with the number of users and assessments associated to them.

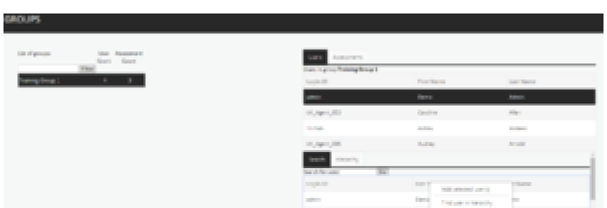
New Groups can be created by right-clicking on an existing group and selecting **New Group** There is also the option to rename or delete the Group.



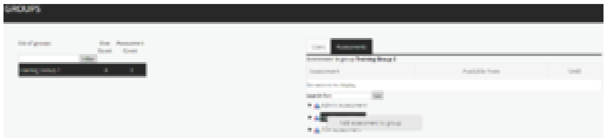
By clicking on a Group in the left-hand window the users and assessments associated to that group are visible in the **Users in Group** window.



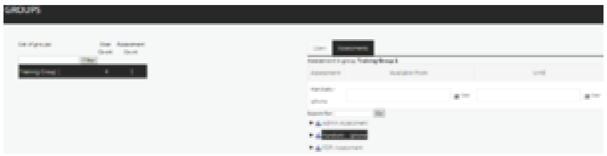
To add a user to a group, highlight the desired Group, right-click on the user and select **Add selected user(s)**. Viewing the user within the hierarchy is available by selecting **Find user in hierarchy**.



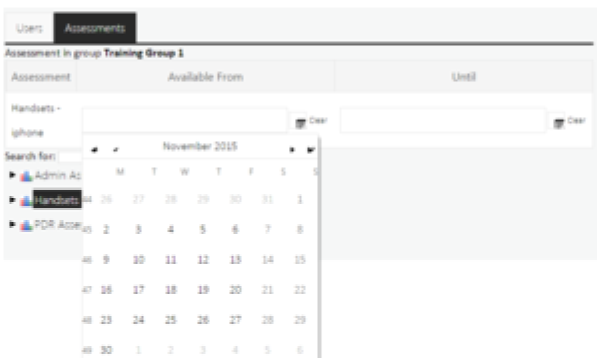
To associate an assessment to the Group, highlight the Group, select the **Assessments** tab and right-click on the assessment to select **Add assessment to group**.



After the assessment has been associated there is the option to give it an available to / from date. This ensures that the users cannot take the assessment before or after a specified date range.



To set the **Available from** and **Until** dates for an assessment, click on the calendar icon. A calendar will be presented, as per the example below. Select the required date and this will then automatically constrain the availability of the assessment. If a date is entered in the **Until** column against the assessment, then this will be visible in the users **My Development** window. If a date is entered in the **Available from** then the user will not be able to launch the assessment and will receive a message accordingly.



Upon viewing assessments with assigned completion dates, if an assessment is not yet available (i.e. if it will not be available until a future date), the assessment will be visible but not available, as shown below.

Assigning Users based on Hierarchy

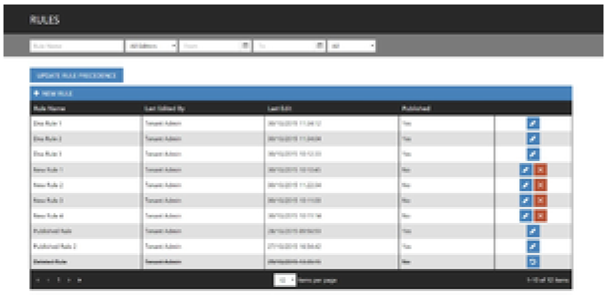
Users can also be assigned to a Group(s) based on their position(s) in the hierarchy.

Highlight the desired Group and then select the ‘Hierarchy’ tab. After selecting the user to assign, right-click and select either Add user(s) in this position – which will only add the selected user.

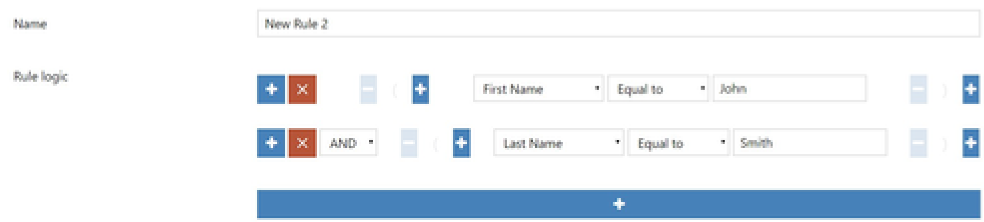
Alternatively, you can add user(s) in all sub-positions, which will add all of the subordinates underneath the initial user, into the selected Group.

Rules-based Assignments

Performance DNA allows the creation of rules for easy assignment of users to groups, roles and job roles based on their data. The rules page initially displays a grid of existing rules with options to create new rules or to edit existing rules.



Rule Logic



Each rule must be given a unique name for clarity.

A rule is constructed by stringing together a series of logical clauses, each of which applies to a single User Field. Clauses can be added, removed and grouped using brackets.

Assignments

Rules can be set to assign users to Roles, Groups and DNA Strands.

Workflow

For a rule to take effect, it must be published. When a rule is published it will be evaluated and its assignments applied to matching users. A rule may be modified without affecting users until it is published or re-published.

Unpublished rules may be renamed and/or deleted via the rules grid.

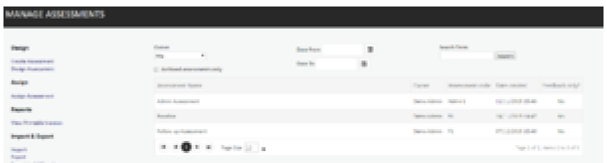
Manage Assessments

Assessments are created and managed in the Assessment page.

After selecting the Assessments page, the Manage Assessments window will be presented as per the example below.

There are four functions available:

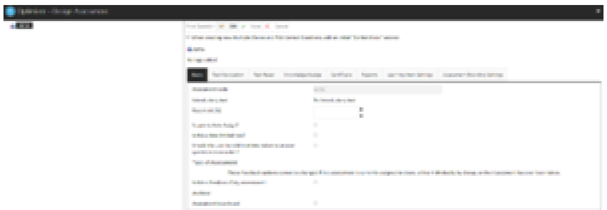
1. Design – create and design/edit the assessment
2. Assign – manually assign assessment
3. Reports – print an assessment
4. Import/Export – import pre-existing assessments, export an assessment to share or for use in an LMS



To create a new assessment, click on **Create Assessment**.

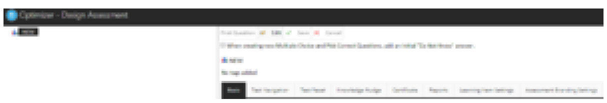
Creating an Assessment

This will present you with the creation template as per the example below.



Rename the assessment by clicking on **New** in the left-hand box.

Basic information can now be configured for this assessment by selecting Edit.



Basic Settings

There are several options that can now be selected and configured:

Automatically insert a **Do Not Know** answer for multiple choice and pick correct answer questions.

Enter matching LMS code in the **Assessment Code** field if the assessment will be exported to an LMS.

Create customized introductory text for the assessment in the **Introductory text** field.

Enter a required overall pass score in the **Pass mark** field.

Automatic Assignment of Assessments

By default, assessments are only available to the users to whom the assessment has been assigned. It is, however, possible to set an assessment to support auto-assignment so that users who receive the URL to the assessment can launch it immediately without it being assigned to them manually. To enable this option, tick the checkbox labelled ‘Supports Auto Assign?’. This will result in an Assessment URL appearing under the checkbox. This URL can be sent via email or other means to Performance DNA users. Once they click on this link, the assessment will be automatically assigned to them and they’ll be able to start it immediately.

Note: This option does not interfere with users who have already had the assessment manually assigned to them. If a user clicks on the link and had already has the assessment assigned to them and has completed it, the assessment will have to be manually reset before it can be taken again.

Select **is this test timed?** to make the assessment timed which will then allow you to enter a duration for the assessment.

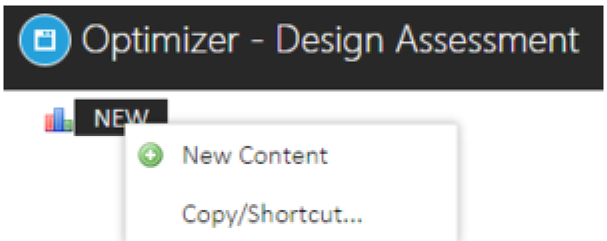
Tick **is this a Feedback Only assessment?** If the assessment is a feedback-only assessment (will contain only ratings/ranking questions).

Tick **Assessment is archived** to archive an assessment.

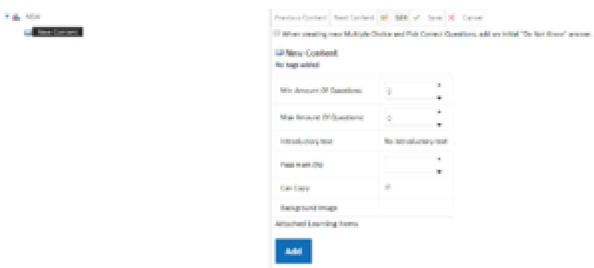
Click **Save** when you have finished making the changes.

Contents

Once the basic information has been selected and saved, create new content by right-clicking on the assessment at the left-hand side and select **New Content**. There is also the option to copy or link (shortcut) to existing content.

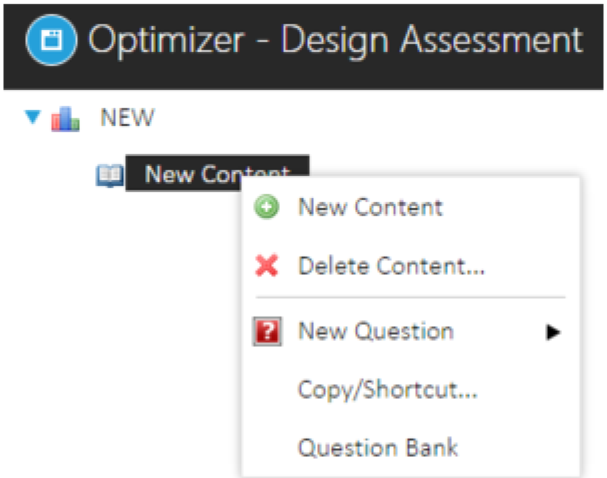


The option to configure the minimum and maximum number of questions for the content is then available along with the option of creating custom introductory text and setting the content pass mark. Leaving **Can Copy** selected allows the content of this assessment to be copied or linked to another assessment.

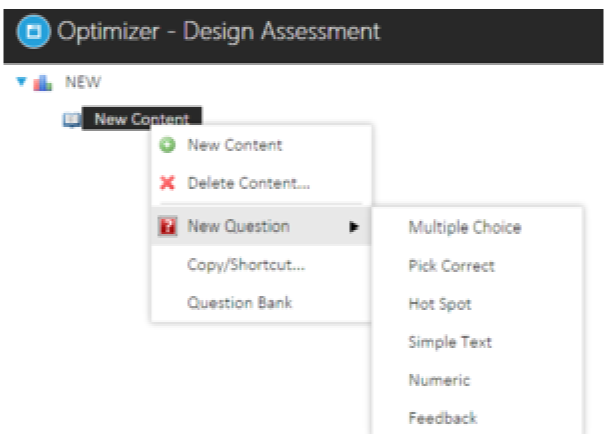


Questions

To create a new question, right-click on the Content and hover over the **New Question** option.



Select the appropriate question type when the **New Question** menu appears.



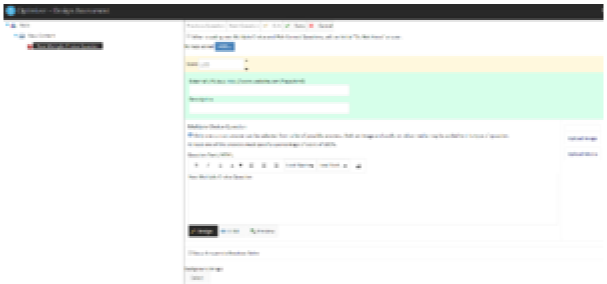
All questions (except feedback) have the option to be Critical or Mandatory and also have an option to request additional information.

Critical Questions must be answered correctly for the assessment to pass. If any Critical question is answered incorrectly, the assessment will fail regardless of the percentage scored.

Mandatory questions will always appear in the assessment.

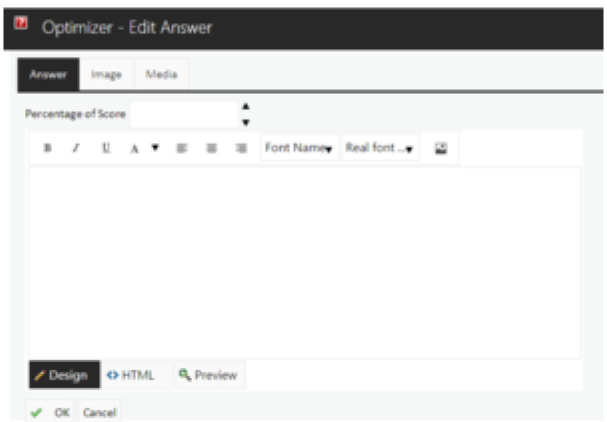
Additional information may be provided with an answer which may allow “working out” or other information related to why someone chose that particular answer to a question.

In the example Multiple Choice question below, a default score of 1.00 will already be associated. There will also be the option to include an external URL along with a description of the URL site. This allows a link to be included in the question text for the user to click on to access. This allows the user to connect to an external page to search for the correct answer.



To create a new answer, click on the **Insert New Answer** box.

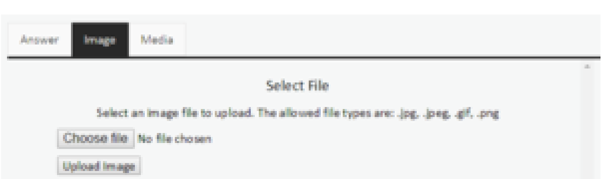
There is also the option to change the question type between Multiple Choice and Pick Correct Answer.

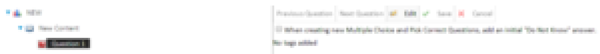


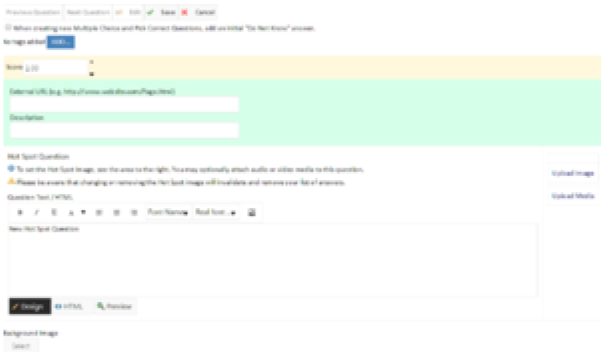
The create new answer window will then be presented to enter the answer text.

Image and **Media** files may be embedded into questions. To embed an image, select **Image**. The following window will appear to browse for the desired image. After selecting **Upload Image** the image will appear below **Preview** to confirm that the correct image has been selected. To save the information return to the **Answer** tab to click on OK once the question has been completed.

Note: It is recommended that media files using the .FLV, .MP3 or .MP4 formats are used in Performance DNA. The in-built media player may work with other media formats but these are not supported.

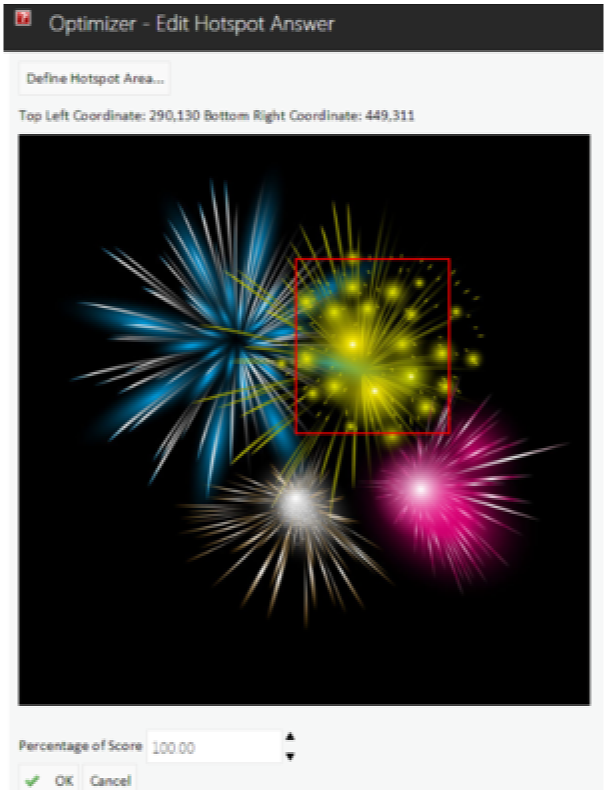


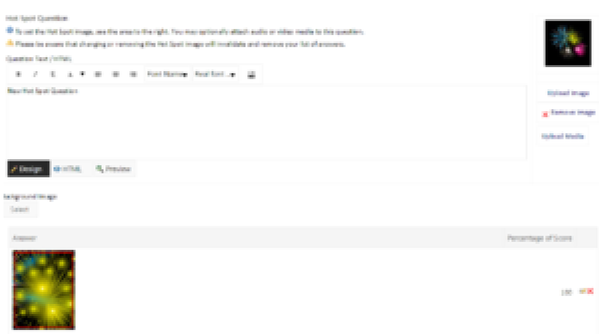




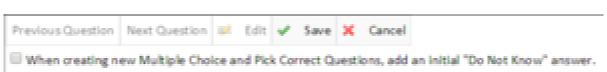
Hot Spot Questions

Follow the instructions to define the hot spot answer area.

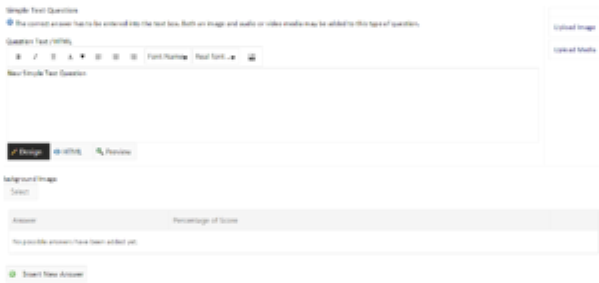




Select **Save** to save the completed Question.

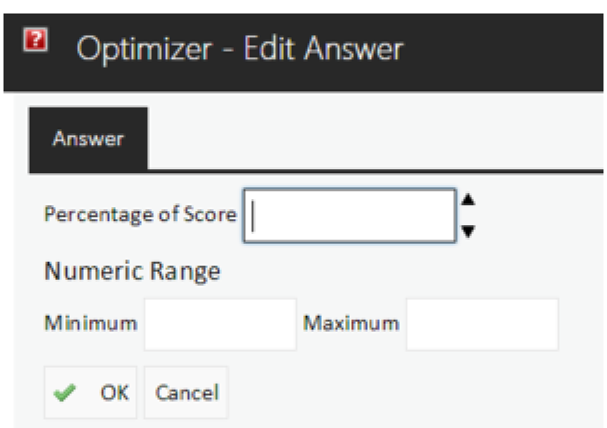


Simple Text Question



Wild card characters can be used when defining answer text for a simple text question. For example if a set of words are required to be entered in order, e.g. ‘red’, ‘green’, ‘blue’ the entered answer text should be: “*red*green*blue*” (without quotes). Alternatively, if the exact order of the words is not important, the entered text should follow the format: “*red*,*green*,*blue*” (without quotes). Note: commas in the expression must not be followed by space characters.

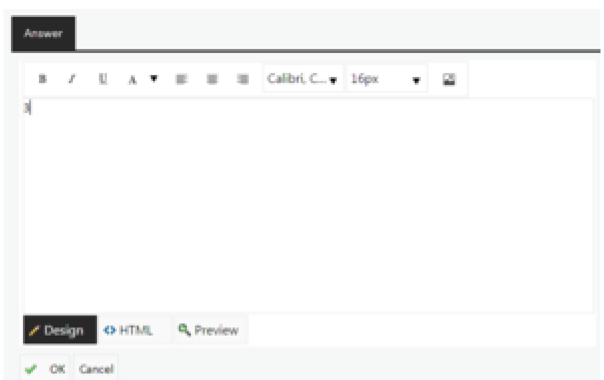
Numeric Question



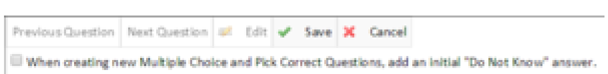
Feedback Questions

Note: Feedback questions cannot be combined with any other question types. Different content sections are created to separate feedback and non-feedback questions.

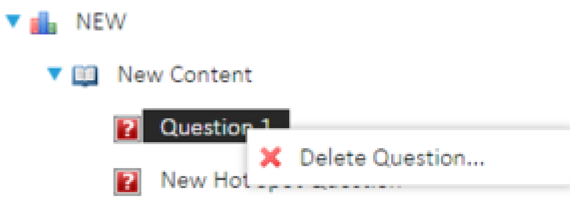
After selecting **Build** the number of minimum and maximum ratings will be presented for completion. Clicking on **Build** will present the ratings to be completed. Click on the number at the left-hand side to enter the detail.



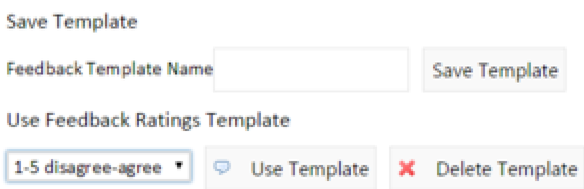
To edit an existing question, select the question and click on **Edit**.



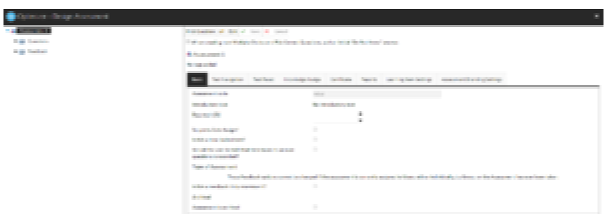
To delete a question right-click on the question and then select **Delete Question**.



To use an existing template for a feedback question, first create a new question and then click on the **Use Template** button after selecting the desired template from the drop down box.

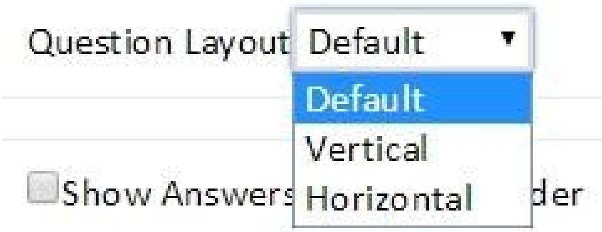


Once the assessment has been completed, click on the assessment name to access the additional functionality.



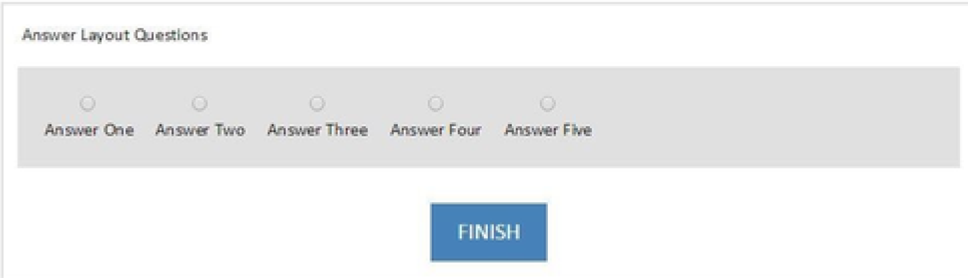
Answer Layout

When creating the answers for an assessment, it is possible to align the answers either horizontally or vertically. This can be done by selecting the “Question Layout” option dropdown as show below. This will allow for the format of the answers to be changed depending on the users desired presentation of the answers.

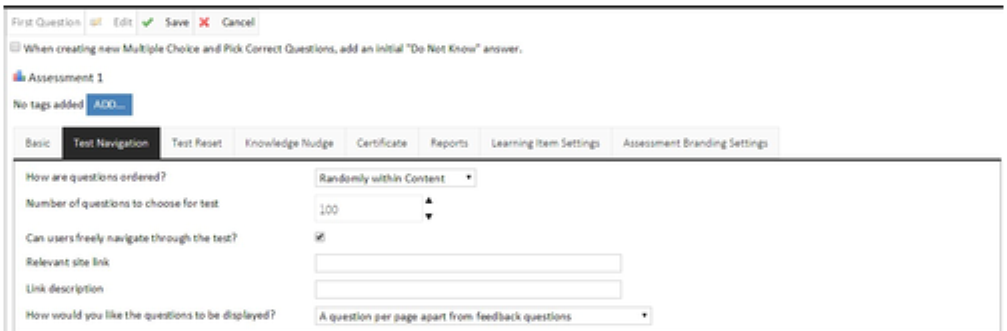


Selecting the Vertical option will present the answers in a column.

Selecting the Horizontal option will present the answers in a row.


Answer Layout Questions
Answer One
Answer Two
Answer Three
Answer Four
Answer Five
FINISH

Test Navigation



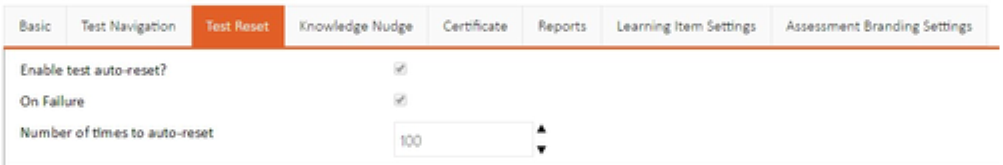
Click on Edit to access the Test Navigation settings Define how questions are ordered by selecting one of the following options from the **How are questions ordered?** menu:

- **In Order** – presents the questions in the order that they were created.
- **Random within Content** – keeps the content order but randomizes the question order within the Content.
- **Randomly across Content** – Questions are presented completely randomly; without clear Content sections.

Allow users to move ahead or back through the assessment (rather than having to answer the questions in a specific order) by checking the **Can users freely navigate through the test?** box

Allow addition of a website URL that may be helpful in answering the question by including a **Relevant site link**, which can include a **Link description** (User friendly description of the URL).

Test Reset

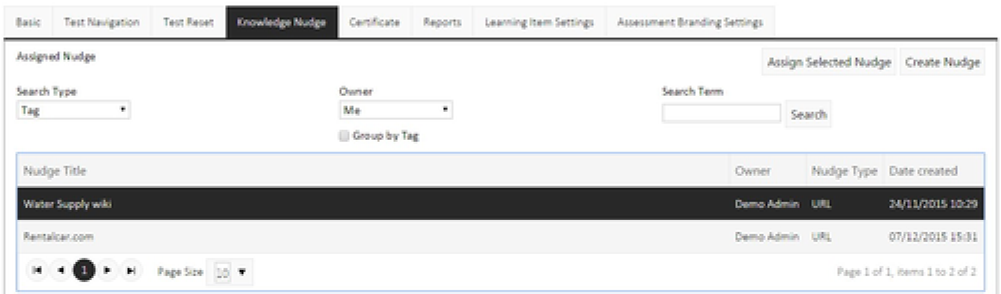


Checking **Enable test auto-reset?** will automatically reset the Assessment if the User doesn’t achieve the required Pass Mark.

The **On Failure** checkbox is ticked by default. This will result in assessments only resetting if the user fails the test. If the checkbox is unticked, the assessment will reset regardless of whether the test is passed or failed.

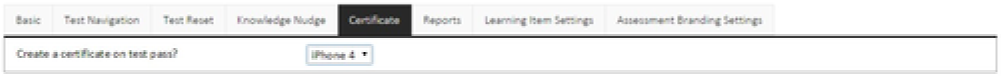
Number of times to auto-reset enables you to set the maximum number of resets / retries the User can have before a Manager / Administrator has to reset the Assessment.

Knowledge Nudge



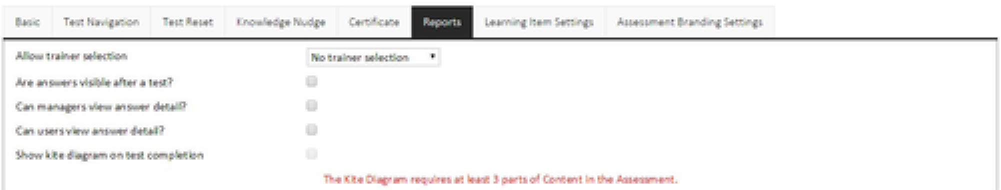
Existing Knowledge Nudges can be embedded into Assessments. Search for the Knowledge Nudge that you want to attach to the assessment, then highlight the Knowledge Nudge and click on Assign Selected Nudge. New Knowledge Nudges can be created from within this tab as well. For further information on Knowledge Nudges, please see Managing Knowledge Nudges.

Certificates



Printable Certificates can be attached to Assessments by selecting the existing certificate from the dropdown list in the Certificates tab.

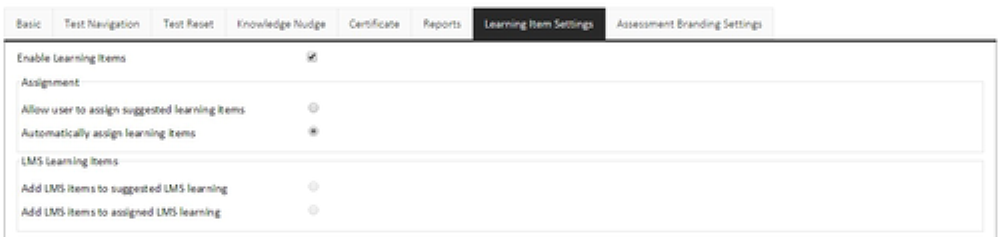
Reports



Options for viewing assessment result reports include the following:

- **Allow trainer selection** – allows users to select specific trainer who can have access to the results at the start of the Assessment.
- **Are answers visible after a test?** – enables users to view the Assessment answers following completion.
- **Can managers / users view answer details?** – manages who can view the given answers.
- **Show kite diagram on test completion** –displays the content scores as a kite diagram (radar chart). Note: For this function to work, the Assessment must have a minimum of 3 Content sections.

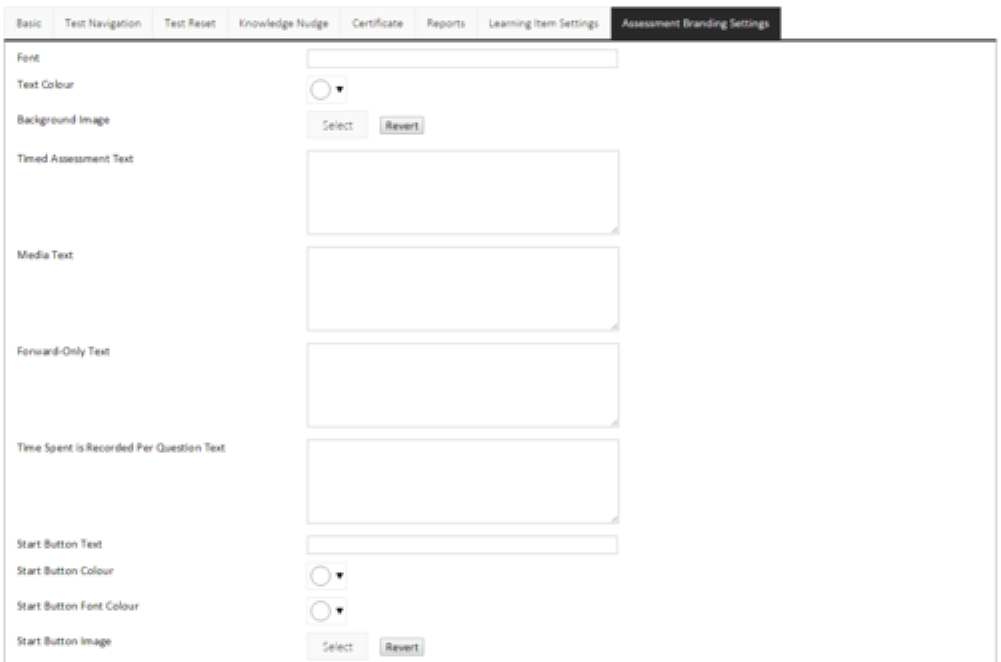
Learning Items Settings



Options for enabling Learning Items (see Managing Learning Items) include the following:

- **Enable Learning Items** – enables Learning Items to be attached to the Assessment
- **Assignment**
- **Allow users to assign suggested learning items** – enables the user to self-select / self-enroll for the Learning Items suggested based on their performance.
- **Automatically assign learning Items** – enables the automatic assignment of Learning Items following an Assessment based on the user's performance.

Assessment Branding Settings

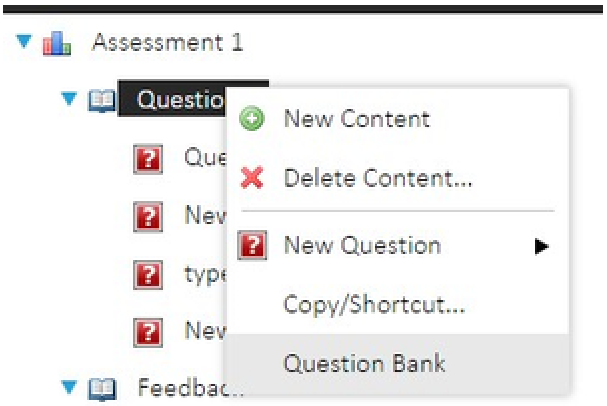


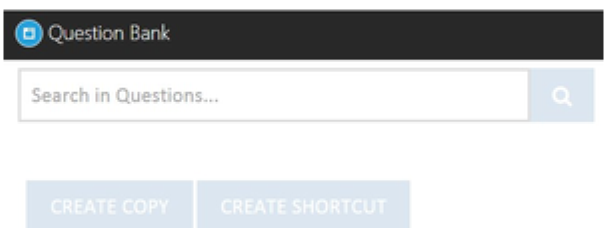
The Assessment Branding Settings allow:

- Standardized fonts and colors to be applied throughout the Assessment
- Customization of Assessment instruction text
- Customization of navigation buttons
    - Setting the wording and colors
    - Or select a custom button image to be used

Question Bank

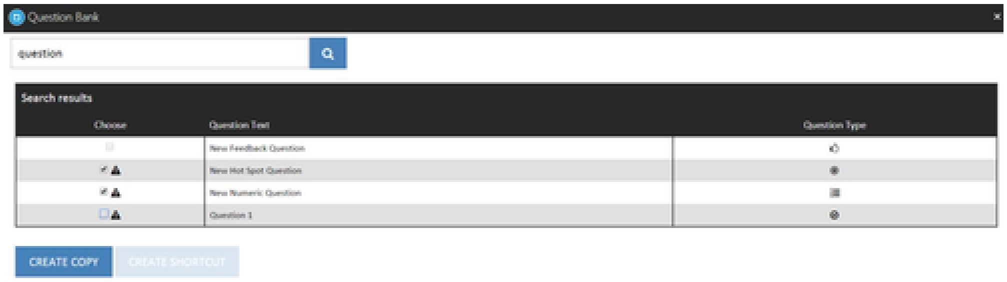
The question bank allows Assessment designers to quickly search for existing questions and copy/shortcut them into new assessments. This feature is accessible from the context menu after right-clicking on a content section in the assessment designer.





The question bank page initially includes a search bar and button. Entering a search term and clicking the search icon will result in a table of search results appearing below the search bar.

The table of results includes checkboxes allowing the selection of questions for copying/shortcutting into the current assessment, question text, and an icon representing the question type. Hovering over the question type icons will enable a text-based description of the question type to appear.



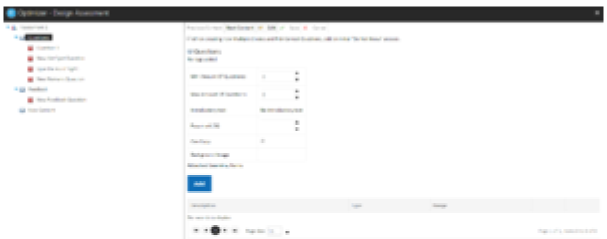
Selecting one or more questions from the search results will activate the create copy and create shortcut buttons. Copying a question creates a duplicate of the question, so should be used when changes to the question are required. If no changes are required then shortcut should be used instead. Copy/shortcut follows the following restrictions:

- Content cannot contain both feedback and non-feedback questions.
- Content cannot contain both sub-contents and questions.
- A question can only be shortcutted into content once.
- Non-feedback questions cannot be added to feedback-only assessments.

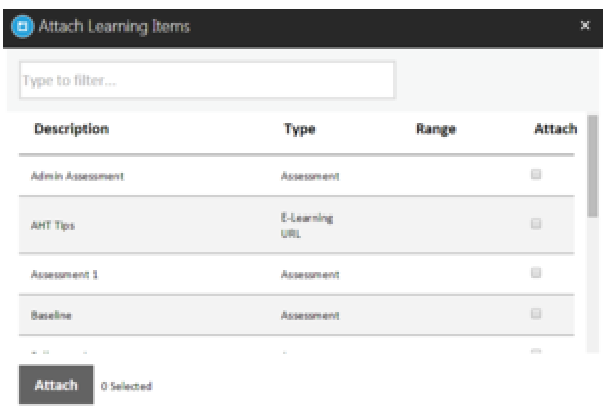
Associating Learning Items with Assessment Content Sections

Performance DNA supports the ability to associate learning items with assessment content sections along with score ranges for the content sections. Users are either assigned learning items automatically once they've completed an assessment, or may have the option to assign learning items to themselves if their score for the content section is within the range specified for the content-learning item association.

To associate learning items to content sections, open the assessment that you wish to modify and click the content section in the assessment hierarchy:



Click the Add button under **Attach Learning Items** to open the **Attach Learning Items** screen.



This form lists all available learning items that can be attached to the content section. The search bar at the top can be used to search for specific learning items. To associate learning items, tick the **Attach** checkbox and set a score range for the learning item. Different learning items can have different score ranges so users will be presented with different learning items depending on the score they achieved for that content section. Once you've finished attaching and setting score ranges for the learning items, click the **Attach** button to complete the process.

The attached learning items will then appear in the table under the add button for the related content section.

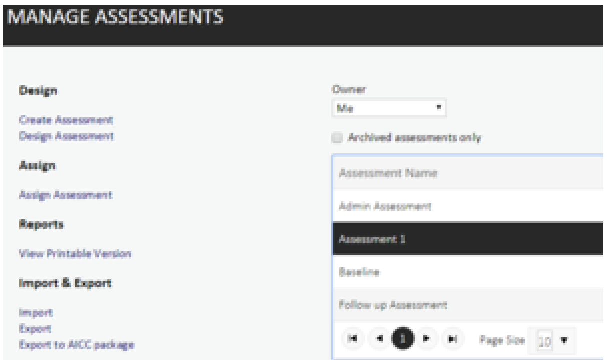
Note: entering values into the search bar will hide learning items from the display even if they've been attached. This is reflected in the number of selected items counter next to the **Attach** button.

To change the setting of the learning item assignment, i.e. whether users are given the choice to assign learning items to themselves or whether the learning items are automatically assigned, click the root assessment node in the root hierarchy view. Click the **Learning Item Settings** tab and click the **Edit** button to enable editing of the Learning Item settings.

Check the **Enable Learning Items** option if you want learning items to be either automatically or manually assigned to users once they complete the assessment. Enable the appropriate radio button in the Assignment section based on your preference.

Note: If you have integrated Performance DNA with a third-party LMS, you will also have an additional set of radio buttons in the assessment's Learning Item Settings tab. These radio buttons are used to control whether learning items are added to the suggested list or the assigned list for users who complete the assessment.

Printing an Assessment



To print off a version of the assessment, highlight the assessment first and then click **View Printable Version.**

Import/Export

The **Import and Export** options enable the sharing of existing Assessments with other Performance DNA users. The **Export to AICC package** creates an AICC course descriptor that can be used with Learning Management Systems.

Note: Exporting assessments will not include the following settings:

- Learning Item Settings tab: Enable Learning Items
- LMS: Enable this assessment in the LMS
- Certificate: Create a certificate on test pass

Knowledge Nudges

Knowledge Nudges are simply information that a user must view, and are normally associated with assessments of the same topic/information. Knowledge nudges are created in one of 3 formats:

- A URL that points to a website on the internet or an internal intranet site
- A PDF document
- A Multimedia file (video, audio)

Knowledge Nudges are often used as robust replacements to paper briefings as each user's understanding of the contents can be assessed.

Standard reports available in Performance DNA can also detail the number of times that a user has accessed any Knowledge Nudges and the average and overall duration of each view.

Performance DNA is able to display PDF content. With the use of Microsoft's PowerPoint, Adobe Acrobat or Adobe Captivate, interactive PDF documents can be created to deliver any information to users which can also include video, audio and hyperlinks. Microsoft's PowerPoint, Adobe Acrobat or Adobe Captivate interactive **is not included with Performance DNA and separate licenses are required for these software applications**.

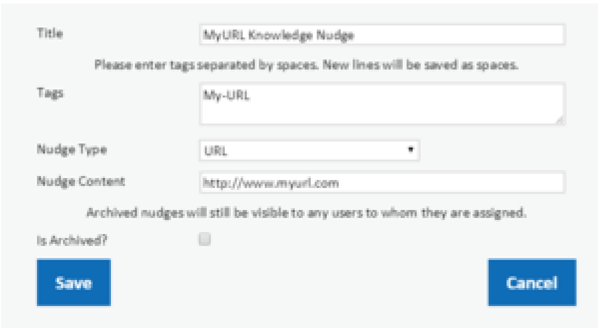
In order for Performance DNA to display PDF content correctly, Adobe Acrobat must be installed on the user's computer. The Adobe Acrobat Reader is freely available from Adobe.

Note: Only one knowledge nudge can be assigned per assessment.

Creating Knowledge Nudges

To create new Knowledge Nudges, go to the **Knowledge Nudge** page and select **Create Nudge**. Select whether you require your Knowledge Nudge to be a website/external URL, a PDF or a multimedia file by selecting the appropriate option from the **Nudge Type** drop-down list.

The example below shows a website URL of www.myurl.com.



Please note that if the Performance DNA application is running over https, then URL nudges must also be accessed over https.

If you wish to upload a PDF to Performance DNA to be used as your Knowledge Nudge, select the **PDF (Portable Document Format)** option from the **Nudge Type** drop-down list. This will display a **Select** button for you to locate the PDF document on your computer, as shown.

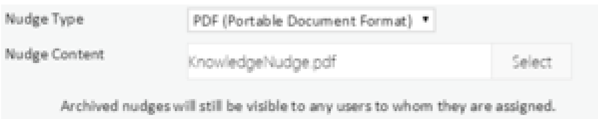


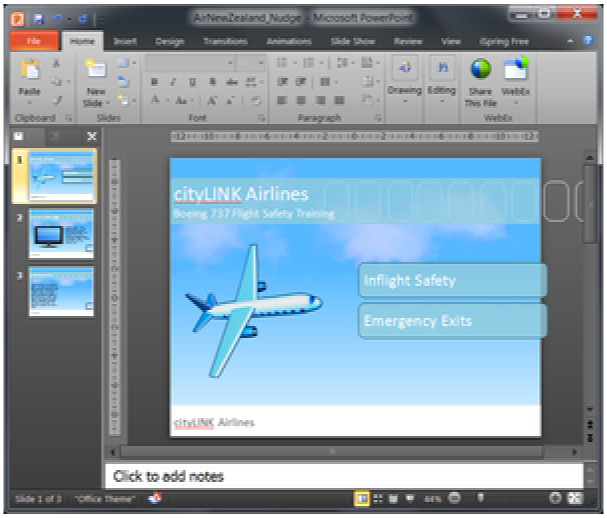
Figure : Creating a PDF knowledge nudge

Multimedia knowledge nudges can be created in the same way as PDF knowledge nudges; first select **Multimedia** from the **Nudge Type** drop-down list, then click the **Select** button to choose a multimedia file.

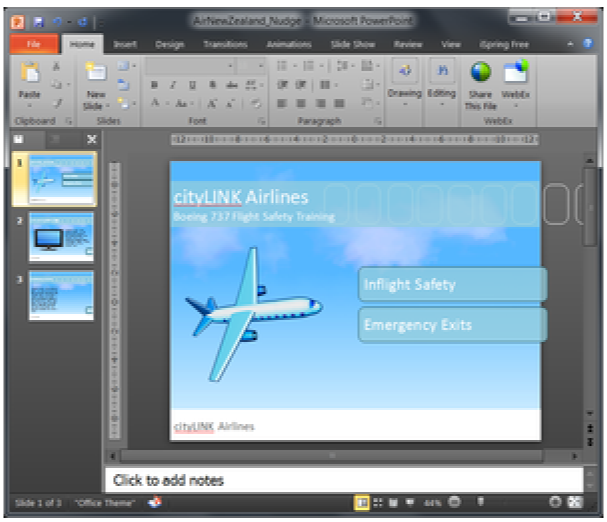
Note: Viewing of multimedia nudges is not supported in Internet Explorer 8.

In order to create some types of interactive multimedia nudges you may require additional software not supplied with Performance DNA such as Microsoft PowerPoint and Adobe Acrobat.

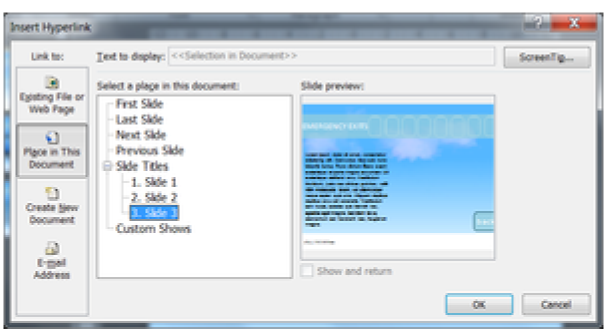
Changes to Knowledge Nudges such as text modification, images, charts and color schemes are managed within the program that was used to create the original content. For example, if the original content was created using Microsoft PowerPoint, changes can be made as shown in the PowerPoint screenshot below. Additional help on using PowerPoint can be found within its Help Menu.



In order to make your presentation interactive you will need to add hyperlinks. These hyperlinks will allow the user to navigate around the presentation by clicking in certain areas. To make an element of your PowerPoint presentation a hyperlink, simply right-click it and select hyperlink.

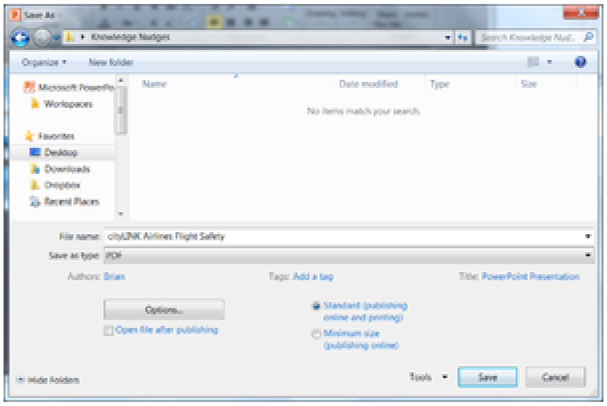


The hyperlink dialog box will then be displayed similar to that below. Select the “Pages within this document” option and select the page of the PowerPoint presentation that should be displayed on clicking.



Click OK when you are satisfied with your selection. Repeat this process for each of the hyperlinks within your presentation. If you run your slideshow in PowerPoint you will be able to test all of your hyperlinks. When you are satisfied that everything is in the correct place you will need to save your presentation as a PDF document.

More recent versions of Microsoft PowerPoint have the ability to create the PDF document from within it. In the save as dialog box select PDF in the **Save As Type** drop down menu and locate where on your computer you wish to save the file.

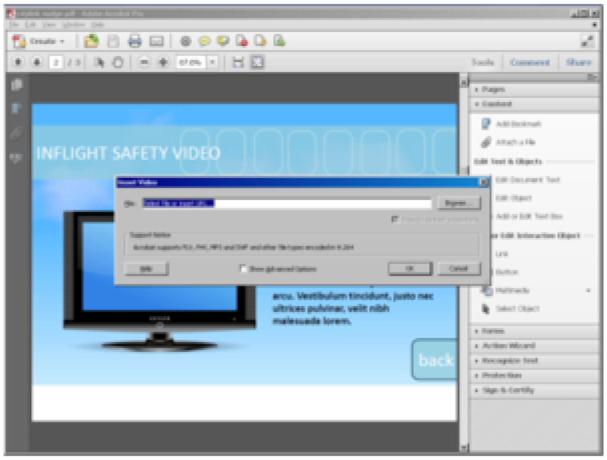


A PDF of your presentation will then be created with all hyperlinks included. If you do not intend to use any video or audio within your Knowledge Nudge then it is ready to be included in your assessment as detailed above. If you do wish to add multimedia content then you should open the newly created pdf document within Adobe Acrobat. You will notice that you can navigate around your presentation.

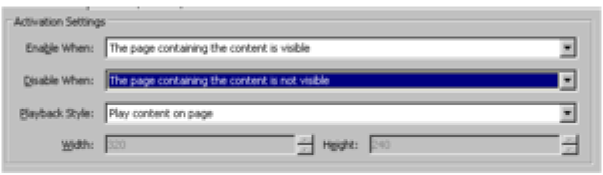
Insert Video Content

Locate a page that you wish to add your multimedia content to then locate your Tools menu in Acrobat. This will display a list of various content types that can be inserted. As shown below

Select the Multimedia option and choose Video. This will allow you to select an area of your PDF where you wish to insert your video. A dialog box will be displayed allowing you to select the location of the video you wish to insert.



Select the **Show Advanced Options** selection. This will enable you to select how you would like the video to be played to the user. You can choose to have the video play automatically as soon as the page is opened or you can only play the video when the video is clicked by the user.



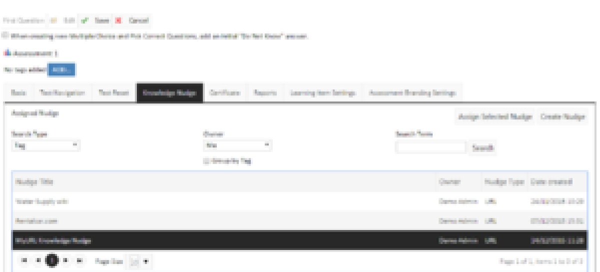
It is also advisable to select that the content should be disabled when the page containing the video content is not visible to the user otherwise the media will continue to play.

When you are happy with your selections select ok and your video will be embedded.

If you navigate away from your page and return you will be able to see your media display in the way you selected above.

Save your PDF document from the File menu of Acrobat. This document is now ready to be attached to an assessment within Performance DNA.

Follow the steps below to assign a Knowledge Nudge to an assessment:

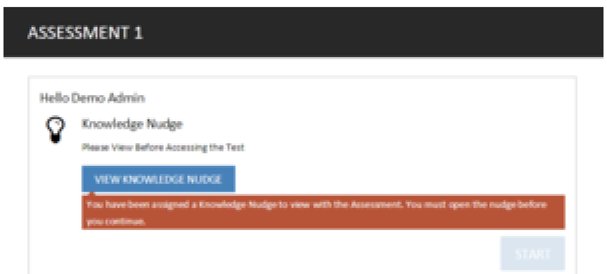


1. Go to the **Manage Assessments** page
2. Select the assessment

3. Click the **Design Assessment** link
4. Click the **Edit** button at the top of the page
5. Click the **Knowledge Nudge** tab
6. Select the Knowledge Nudge from the table (it is possible to search for the Knowledge Nudge via tag/ title/tag & title options)
7. Click the **Assign Selected Nudge** button.

When a user begins an Assessment, the Knowledge Nudge icon will appear on the first page of the Assessment. Clicking on this item will then launch the associated Knowledge Nudge (URL or PDF).

When a user selects an Assessment, they are advised that there is an attachment to view before accessing the test. The user will not be able to begin the Assessment until they have viewed the Knowledge Nudge



Managing Learning Items

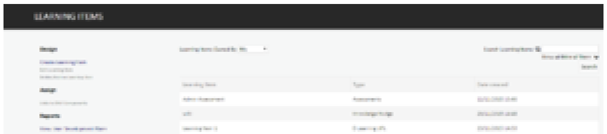
Performance DNA supports the creation of a range of learning items which can be associated with DNA Base Data Definitions to assist in improving user performance. Supported learning item types include: **Assessment**, **Knowledge Nudge**, **E-Learning URL** and free text. The **JLMS Course** learning type may also be available if you have configured the optional LMS integration feature.

Users can create learning items and assign them to DNA components. Once DNA data for users is available, administrators can assign related learning items based on performance. Assigned learning items are added to the users' development plans and are visible in the users' **My Development** page.

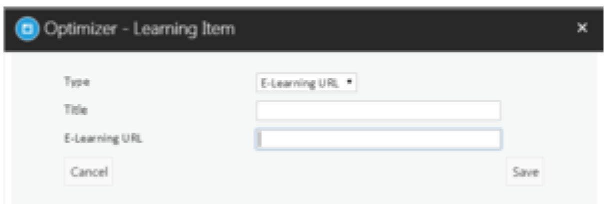
Creating Learning Items

To create a new learning item, go to **Learning Items** page and click the **Create Learning Item** link.

Next, specify the **Type** of item that you wish to create.



Note: When creating an Assessment or Knowledge Nudge an associated Learning Item is automatically created.



When creating an E-Learning URL, you will be required to enter a title and URL for the new item. The URL must start with either ‘http://’ or ‘https://’. Similarly, if you choose to create a free text learning item, you will be required to enter a title for the item and the associated text.

If you choose to create a new JLMS Course learning item, select the **JLMS Course** option from the **Type** select box. Three additional dropdowns will appear allowing you to select a category, curriculum and a course. It is necessary to select these items in order, i.e. category first, then curriculum and, finally, a course. However, once you set a category the curriculum select box will become optional.

JLMS learning items are assigned to users in the same way as other learning item types.

Note: the option to create a JLMS course learning item will only be available if the user who is logged in is mapped to a valid JLMS user (via the user field defined for the LMS integration feature). Similarly, JLMS course learning items can only be assigned to valid JLMS users.

Editing Learning Items

To edit a learning item, browse to the Learning Items page. Select a learning item from the table and click the **Edit Learning Item** link. A dialog box will appear that includes the item’s current settings. You can then edit these settings before clicking **Save** to apply the changes.

Deleting Learning Items

To delete a learning item, browse to the **Learning Items** page. Select a learning item from the table and click the **Delete/Archive Learning Item link**. **Note**: Attempting to delete a learning item that is associated with a DNA component or assigned to users will cause it to be archived, otherwise it will be deleted.

Filtering View of Learning Items

Performance DNA supports a range of options to filter the display of Learning Items, including restricting the items shown based on the user who created them (i.e. either display all Learning Items or just those created by currently logged in user), constraining by date created range, and choosing whether to include archived Learning Items. It is also possible to search for a specific Learning Item by entering a set of keywords in the **Search Learning Items** text box and clicking the **Search** button.

Genesys EWM Learning Item Integration

Performance DNA has an integration feature with Genesys WFM which allows learning items to be sent to agents in EWM. To enable this feature, go to the System Settings page in Performance DNA and tick the EWM Enabled tick box in the General Settings tab. Once this tick box has been ticked an EWM URL Endpoint textbox will appear underneath it. Set the value of this textbox to the EWM URL Endpoint in your environment and click Save Changes.

Once this setting has been enabled it will be possible to set learning items as EWM Enabled in the Learning Items page. Once a learning item has been enabled for EWM integration it will be sent to the corresponding Genesys agents in EWM as well as to the agent’s account in Performance DNA when it is assigned.

Notes:

This feature requires that Genesys employee IDs match Performance DNA users’ Login IDs.

To set up the EWM capture points and routing rules required for EWM, please see the EWM documentation.

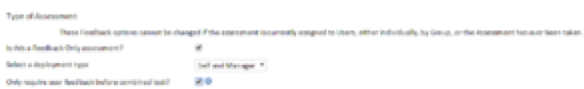
Creating Feedback Assessments

Feedback Assessments are used for providing rating and ranking responses only. They are created the same way as standard assessments, but there are unique settings and constraints which set them apart.

To create a feedback assessment, select ‘**Is this a Feedback Only Assessment?’** The option enables the settings for who will have access to the assessment in the feedback model; e.g. for **Self** or **Self and Manager**.

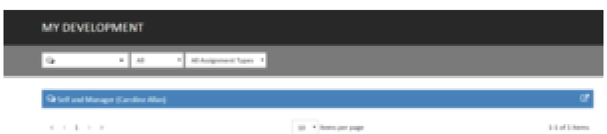
Where the assessment has been created for **Self** and **Manager** the manager will automatically be assigned the assessment to complete on the user that reports to him/her, based on the hierarchy.

If the feedback assessment has been set to ‘self and manager,’ an additional checkbox (labelled ‘Only require user feedback before combined test?’) will appear. Enabling this will prevent the manager from seeing the feedback assessment until it has been completed and submitted by the user. Once the user’s feedback is submitted, the manager will get the option to create a combined feedback assessment without completing their own version of the feedback assessment first.



Both the Manager and User will see the Feedback Assessment listed in their My Development page. Managers can use the dropdown filters to display specific Assessment types.

After selecting the **Combined Feedback** filter, the assessment will be presented.

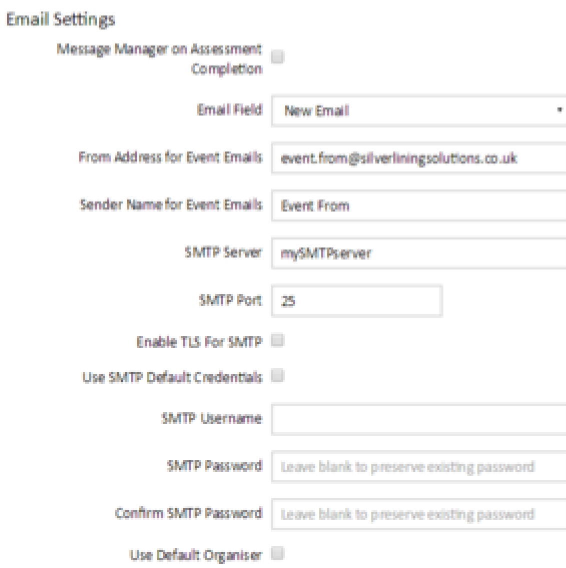


Email Notification Service

It is possible to set Performance DNA to automatically send an email notification to managers when their subordinates have completed an Assessment. This optional feature is enabled via the **Systems Settings** menu.

Configuring Email Settings

From the **Systems** menu select **Systems Settings** and the **General Settings** tab.



Message Manager on Assessment Completion – Check to enable sending Assessment completion emails to the users Manager.

Email Field – From the dropdown box select the User Field that is used to store the email address. This will be used as the recipient's email address.

From Address for the Event Emails – this is the default sender address that will be used when creating email notifications. This would typically be a team or department inbox.

Sender Name for Event Emails – This is the default senders name, typically this would be the Team / Department name of the business area responsible for assigning learning.

SMTP Server – the name / IP address of the outgoing mail server that will be used to send out the notification emails.

SMTP Port –the port assigned to SMPT traffic on the email server.

Enable TLS For SMPT – this should be selected if an encrypted / secure connection to the email server is being used.

Use SMTP Default Credentials – this should be checked if the email server doesn’t require specific account details for sending emails. If unchecked the following additional settings are required:

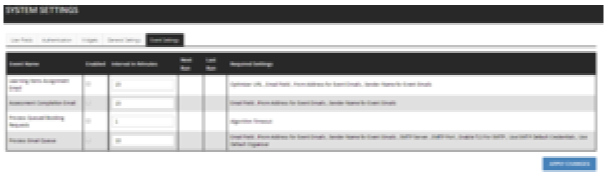
SMTP Username – Username for the account being used for sending email notifications.

SMTP Password – SMTP account password.

Use Default Organizer – When selected all email notifications will be sent from the configured **From Address for the Event Emails** and **Sender Name for Event Emails**. When unselected emails will be sent using the user details of the person organizing the training / **Assessment**

Enabling Email Events

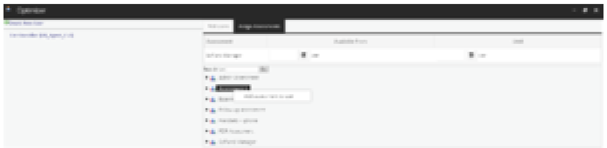
After configuring the email settings email notifications can be enabled using the **Event Settings** tab.



From the **Event Settings** tab check the **Enable** box for each of the different email notifications that you wish to use and set the **Interval in Minutes** column to the frequency that you want emails sending.

Assigning Assessments to Individual Users

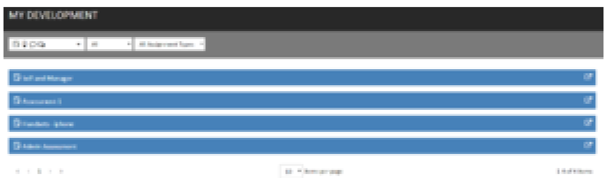
The option to assign an assessment to an individual is available in the User Detail window. After selecting an individual user, click on **Assign Assessments**.

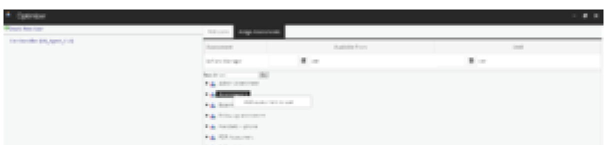


The assessments available for assignment are visible to select and assign to the user.

Right Click on the desired assessment and select **Add assessment to user**.

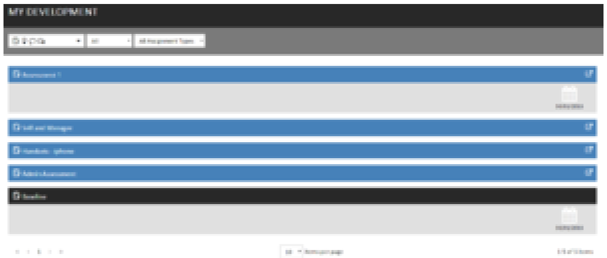
The individually assigned assessment will be visible on the user’s **My Development** screen.





Date Restrictions on Assessments

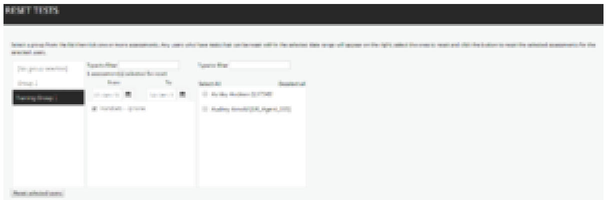
The **My Development** page displays the date that an assessment needs to be completed by (providing a date constraint was applied to the assessment and/or individual).



Assessments that have been assigned before the start date will appear at the bottom of the list as inactive. On the day of the start date the Assessment will move up the list and become active and ready for the user to launch.

Ability to Reset Multiple User Tests

User Assessments can be reset in the **Reset Tests** page (this page needs to be added to the relevant job roles).



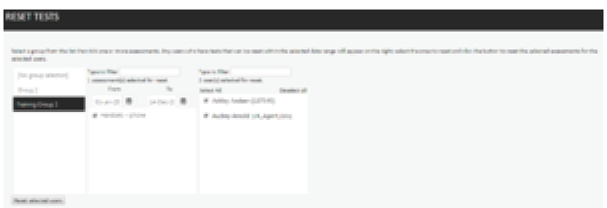
Assessments can be reset by group or for an individual. The Group names will appear at the left-hand side with the option of selecting the group or an individual within the group only.

The second column will then be populated with the titles of any assessments that have been taken. If this list is large you can apply a date filter by entering the date range.

Note: The date range needs to include the dates when the users have taken the assessments.

A free text filter can be used to search for a specific assessment by name. If you change any of the filtering criteria the list of assessments will update automatically.

Select the title of the assessment you wish to reset; multiple assessments can be selected at this stage if required. A third column will then appear showing the names of users who have taken the selected assessment, as shown in the following example:



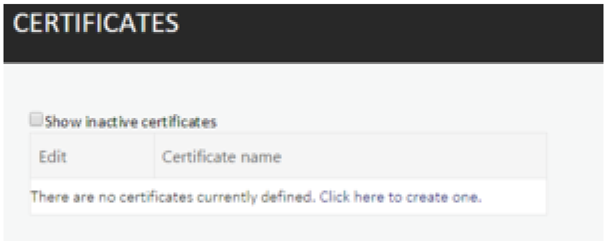
Select the names of any users you wish to reset then click the **Reset Selected Users** button. If there are a number of users shown you can use the filter to search for a particular user.

Create Customizable Certificates per Assessment

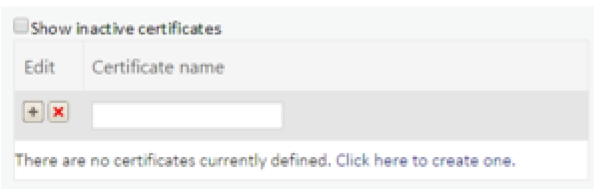
This section describes how to create and manage customizable certificates.

Creating Certificates

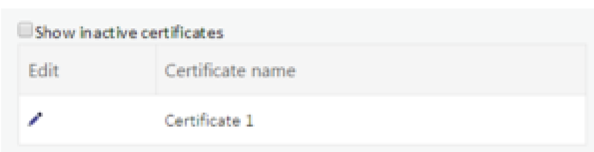
Go to the Certificates page. Any existing certificates will be visible. To create a new certificate, Click **click here** text.



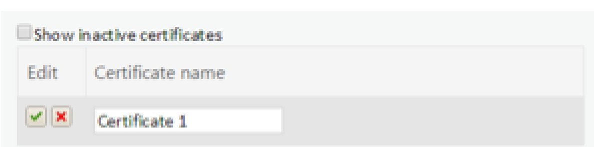
Enter a meaningful name for the Certificate in the field provided. It is important that you name your certificate appropriately as you will need to assign this to individual assessments at a later date.



When you have entered the Certificate name, click the plus icon to save the name change.

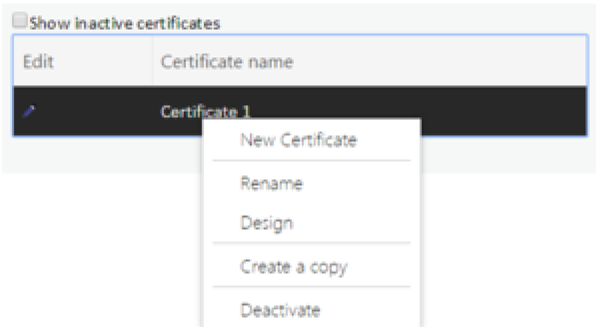


If you wish to rename the Certificate click the icon which will enable you to change the Certificate name.

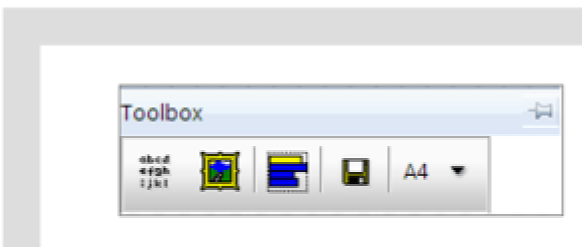


Click the icon to confirm your changes. If you wish to cancel your changes you can select the icon.

To design the content within the Certificate, right-click the certificate name and select **Design** from the dropdown menu. (You will notice that you can also rename existing and create new Certificates from this menu as well.



After selecting **Design** you will be presented with a blank page containing the **toolbox**.



The white area within the grey border represents your certificate page. By clicking on the title bar of the **Toolbox** you can drag this around the screen in order to make it easier to see more of your page.

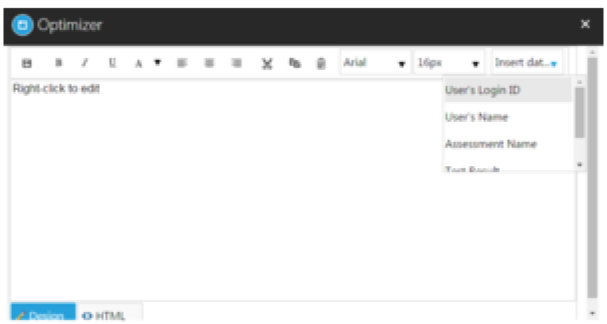
Items are added to your page by selecting them from the toolbox. Once selected they will be added to the top left-hand corner of the screen and can then be dragged and resized into position.

Adding Text to a certificate

Click the text icon from the toolbox. This is the first icon as shown in the diagram above. Clicking this icon will add a new next box into the top left-hand corner of the screen.

Right click the text as shown and you will be presented with a menu to edit the item.

Select **Edit Item** and you will have the ability to edit the text in the box.



You can then use the text editing tools as normal such as Bold, Italic and Underline as well as change the font sizes and colors etc.

If you wish to add elements of dynamic text, such as the name of the Assessment or User, this can be selected from the **Insert data field** dropdown box, as per the example above. This will create an area for this information to be included wherever the cursor was positioned within the text box.

Once you are satisfied with your text press the

icon. This will add your text to the certificate. In most cases you will need to resize the box to accommodate your text. To do this, click the right hand corner of the text box (the icon will change to a double pointed arrow). You can drag to resize.

To move your text, place your mouse pointer over the text box, click, and you can drag it around the screen.

Remember to ensure your text box is large enough to accommodate any dynamic text that will be entered such as a user's full name or the name of an assessment.

Use the save icon within the tool box (1^{st} icon) to regularly save your certificate. If any items such as text or images are outside the boundaries of the page these will be brought back into alignment automatically to ensure they fit the page.

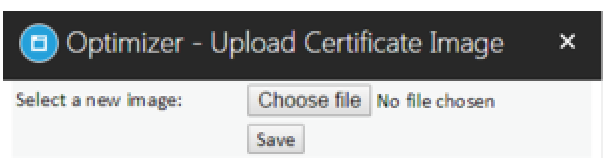
You can add multiple text boxes within your certificate.

Adding an image to your certificate

Click the image icon; this is the 2nd icon within the toolbox. Like other content, this will be added to the top left-hand corner of your certificate. Right clicking it will open a menu allowing you to replace the image with one of your own or the ability to delete the image.

Select **Replace image.**

This will open a dialog box allowing you to locate an image on your computer to be included as part of the certificate.



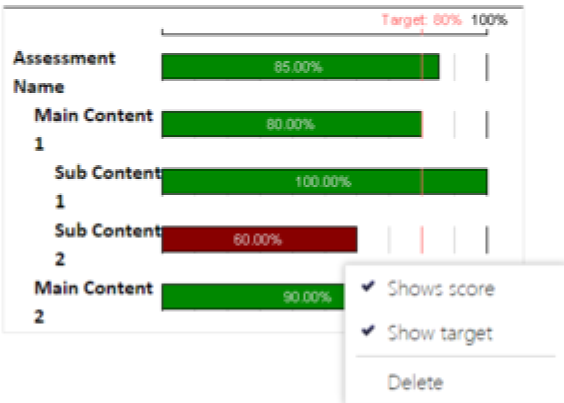
Once you have selected your image click **Save** and the certificate will be updated with the chosen image.

As before this will be in the top right hand corner and can be resized and moved into the appropriate position.

As you progress through the design of your certificate it is recommended that you use the Save icon to save any changes you make to your work. Should any items be placed outside the page size defined for your certificate you will be presented with a warning and the offending elements will be moved to within the page.

If you wish to add additional details of the user results then the third icon as shown will add a graph to your certificate. As with the previous items this will be added to the top left-hand corner of the certificate and you can drag and resize this into the required position.

This item has a number of different options that you can select from by right-clicking. For instance, you can choose whether you wish the graph to show the achieved scores, including the required pass mark. By default these will be available and simply select them to toggle whether they are visible within the certificate. If you wish to delete a chart then right-click also provides you with the delete option.

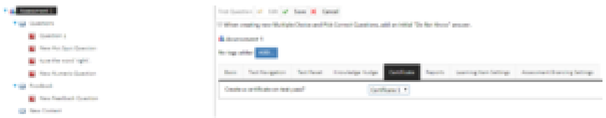


Once you are satisfied with your certificate ensure that it is saved and then close down the designer window. By default your certificate is now available to be attached to any existing or new assessments.

To remove a certificate, right-click the certificate name and select **deactivate**.

Assigning your certificate to an assessment

The option to assign a certificate to an assessment is located in the Assessment properties.



Remember to save any changes you make to the assessment properties. If a certificate has been defined against an assessment it will be loaded automatically for the user to print once they have achieved the required pass mark.

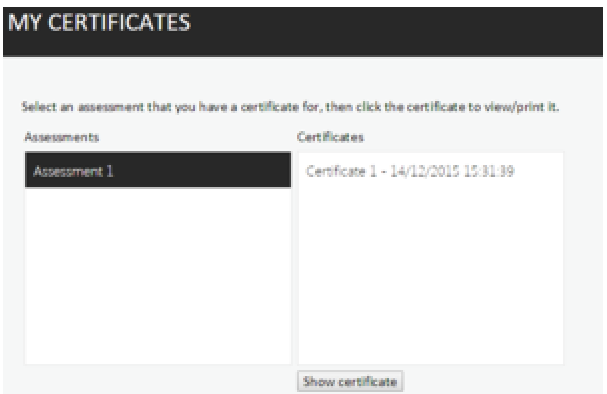
This setting can be changed at any time by selecting a new certificate or the **No Certificate Selected** option. Should an assigned certificate become deactivated, the certificate will no longer be presented to the user upon completion.

Recalling Awarded Certificates

If a user has achieved the required pass mark, the certificate will be presented automatically upon completion and can be printed, if necessary, as a record of achievement. If a printer is not available or there is only a requirement to store it electronically, it will be saved within the user's **My Certificate** page for viewing at any time.

A list of assessments that the user has successfully completed is visible in the **My Certificate** page. To view a certificate, click an assessment name and all of the associated certificates will be displayed along with the date and time they were awarded.

Click the certificate to open and prepare it for printing.



Reports

This section describes each of the available PDNA reports.

Feedback Results Report

The Feedback Results Report displays a comparison of feedback assessment answers. To generate a report, select a date range at the top of the page to filter the list of assessments available for selection, then select a user from the hierarchy and one of the user's feedback assessments from the bottom-left of the screen. Click the 'Rebuild report' button to generate the report.

The resulting graph will display the possible answers for each question with a line showing the answers chosen by the user and their manager (if the assessment has also been taken by the manager).

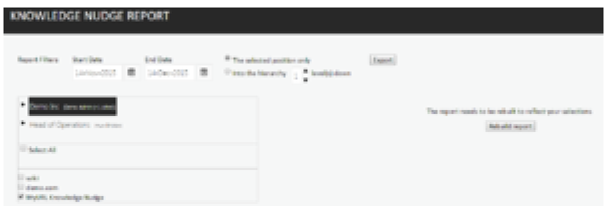
Knowledge Nudge Reports

Select the **Knowledge Nudge Report** (location of this report depends on application setup settings; default location is under the **Reports** tab).

Select a user (**Note**: available user information will depend on where the individual is situated in the hierarchy).

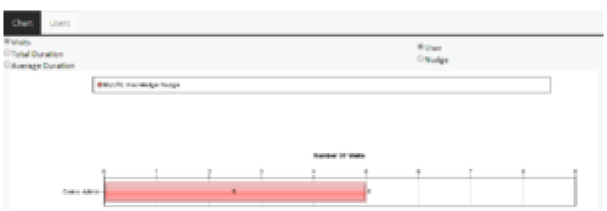
In the following example the user has been selected by **selected position only** but users may also be selected in the **hierarchy**.

After selecting an individual, a list of the assessments in which knowledge nudges have been accessed is presented in the bottom left-hand window.



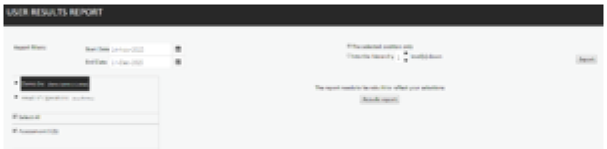
Click **Rebuild Report**.

The information is then available to view and there are several options to select from.



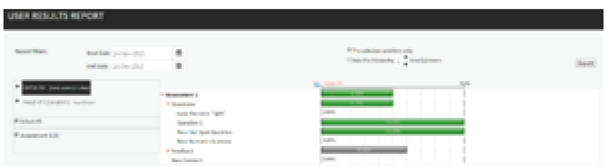
Assessment Report

Select **User Results Reports** from the **Reporting** section to view Assessment results. Based on the user's position within the hierarchy, the **User Results Report** can be run for an entire site, department, team, or individual.



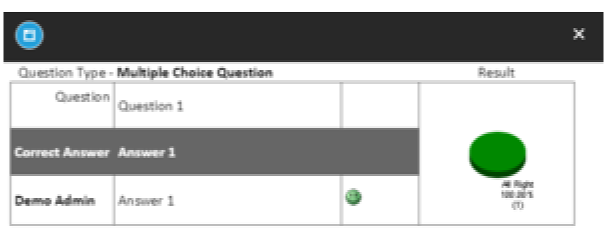
- Select required date range.
- From the hierarchy view select the hierarchy level or individual.
- Select the assessments from the bottom left-hand window. These are all of the assessments that the individual has completed.
- Click **Rebuild report** to view the results.

The results can be expanded by clicking on the Assessment name to reveal the Content level results. Click the Content name to view the individual questions as per the example below.



Right-click a question to **View Detail** about a question.

Click **View Detail** to reveal the answer given and the correct answer. Where a team has been selected, (x levels into the hierarchy) it will list all of the team members with their respective answers.



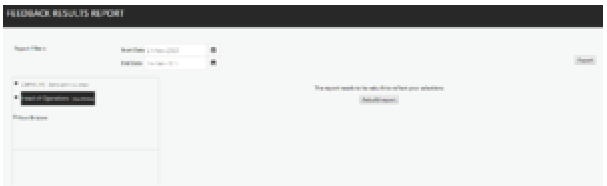
Click the **select for export** button and then click **Export** to export the data into an Excel spreadsheet.

Click the disk icon to select the level of data that you want to export. After selecting your required level of data aggregation click the Export button to download the data as a CSV file.

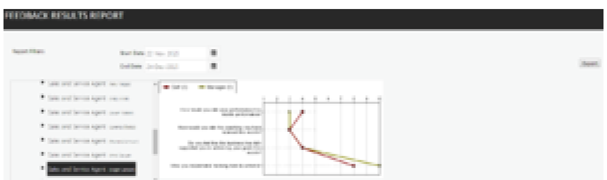
Feedback Report

Users can be selected at a hierarchy level or individually within the hierarchy structure.

Using the date range will filter the feedback assessments that the individual has completed in the bottom left-hand window. Select the specific assessment and click **Rebuild report**.



The information presented will display the user feedback together with the manager feedback depending on whether the assessment has been created as user and manager and if the manager has completed their feedback assessment.



The information is also available for exporting to an Excel spreadsheet by selecting **Export**. The Excel spreadsheet will contain the criteria used in the assessment.

Admin Reports

To access the Admin Reports select the Admin Reports page and a window similar to the one below will be visible.

There are three Admin Reports:

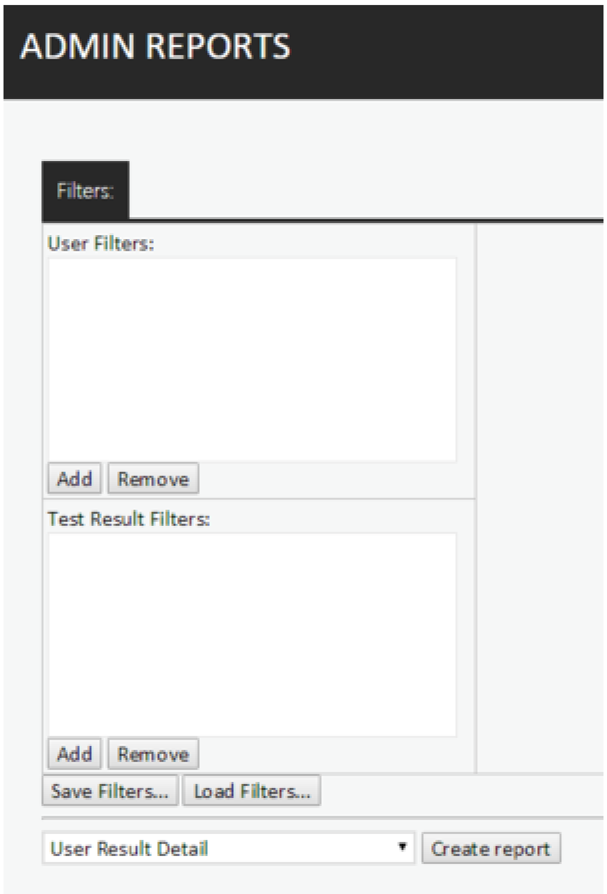
- User Result Detail
- User Feedback Response Percentages
- Question Response Summary

Reports can be generated without any filters, therefore presenting all of the associated detail.

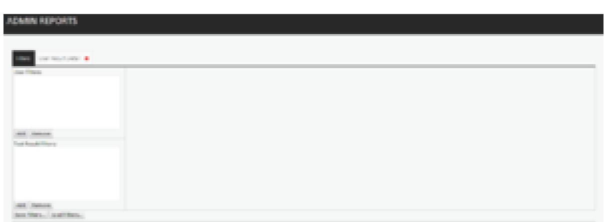
User Result Detail

Select the **User Result Detail** report from the drop down box at bottom of the Admin Reports screen**.**

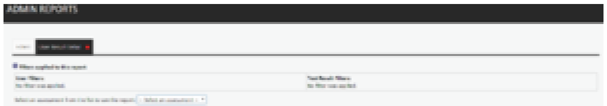
Next, click on **Create Report**.



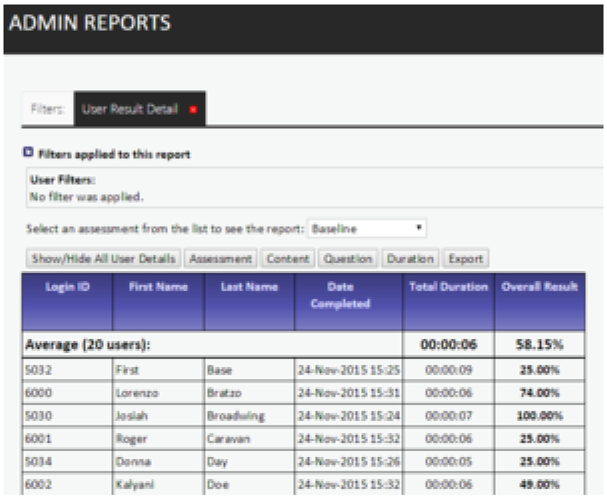
The report will then appear at the top of the page next to the Filters tab.



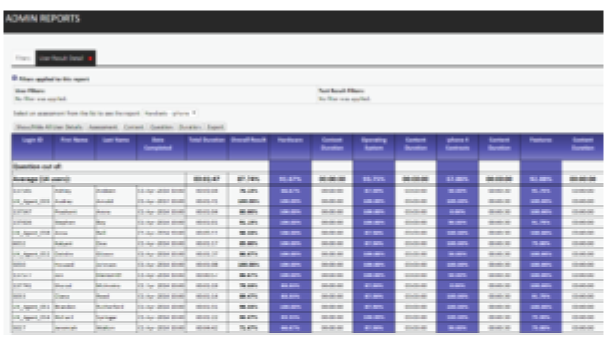
The option to select a specific assessment from the available assessments is visible after selecting the report.



The data can then be expanded to Content and Question level with the option to Export into Excel. Click on the relevant buttons to expand the data.



Clicking the ‘Duration’ button will show how long each user spent on each question in the assessment, as well as the total duration spent per content section.

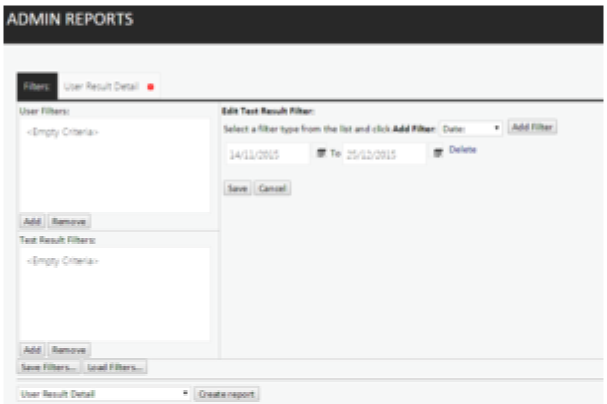


Using the Report Filters Option

Filters can be created and saved by selecting **Add** which will then present the **Edit User Filters** as per the example below.

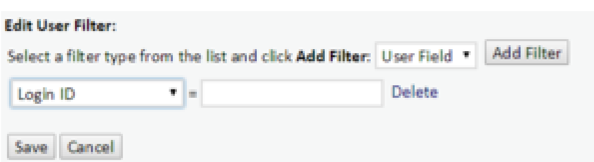
Use the drop down box to select the filter. In the example below the options are – Hierarchy, User Field & Group.

Once the filter has been selected click on **Add Filter**.

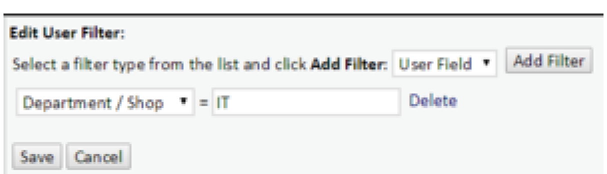


In the example below the filter added is the **User Field**, which then reveals the fields available.

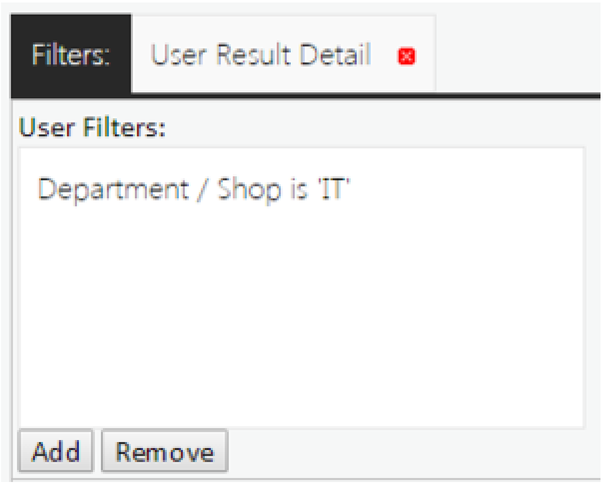
Select the additional filter.



In the example below the field selected is Department and this is set to show results for ‘IT’. ‘IT’ has to be manually entered into the right hand box.

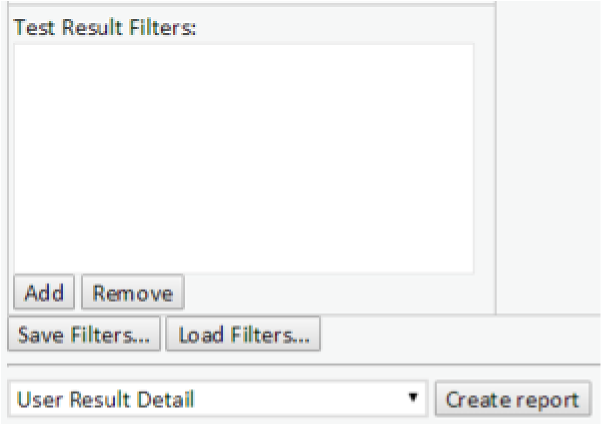


Once the filter has been created, this can be saved to use against any report selected. Click on **Save** which will then save the filter to be used as and when required in the **User Filters** box.

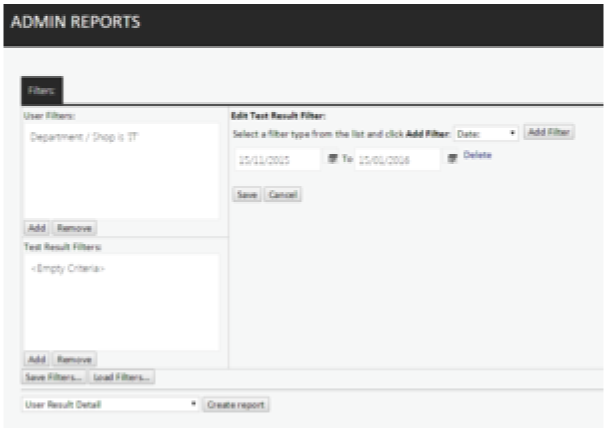


Additional **Test Result Filters** can also be created.

Click on the **Add** button under the **Test Result Filters** box.

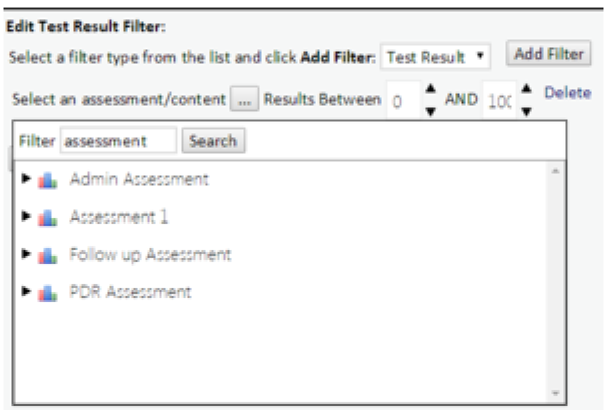


The available filters are then visible in the drop down box. Once the filter has been selected, click on **Add filter**.

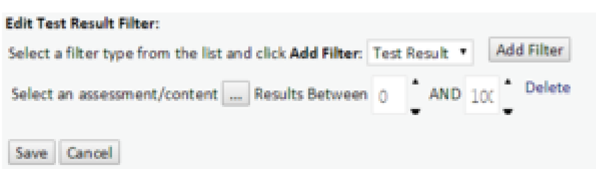


There are two available options in the **Edit Test Result Filter**:

Test Result filter as per the example below.

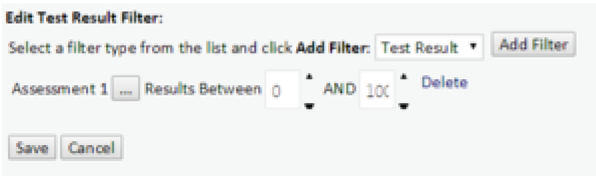


There is also the option to save a specific assessment with the filter if this is a report that has to be created on a regular basis.

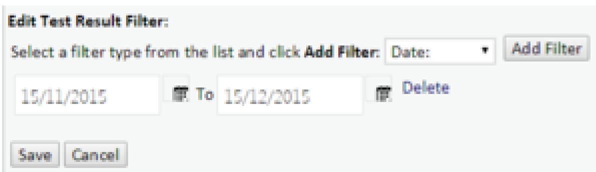


Click on the … button to open the Assessment Search window.

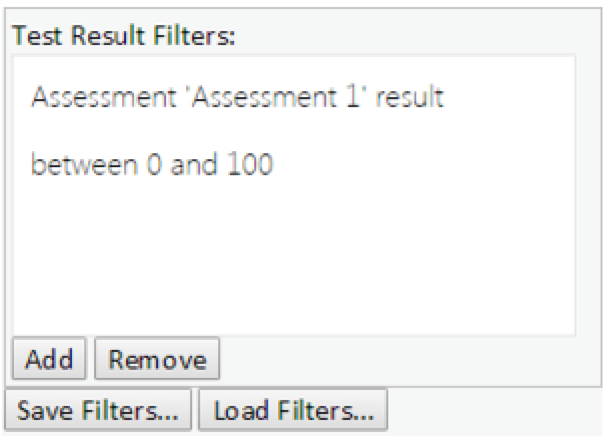
Once an assessment has been selected, this will save the details together with the results as a filter once **Save** has been selected.



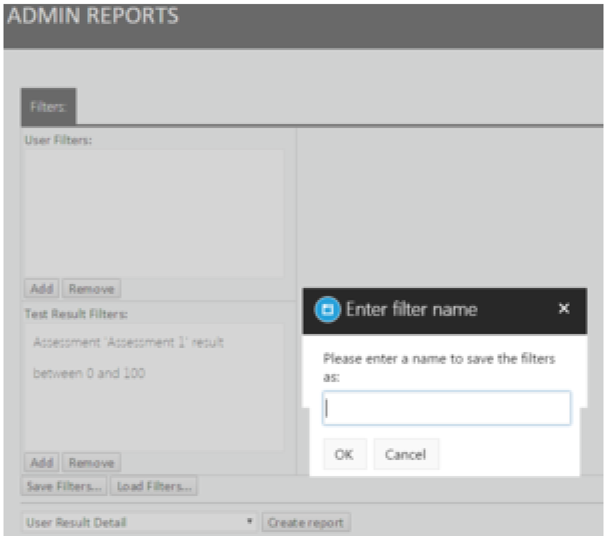
Selecting the **Date** filter enables you to filter Test results by date range.



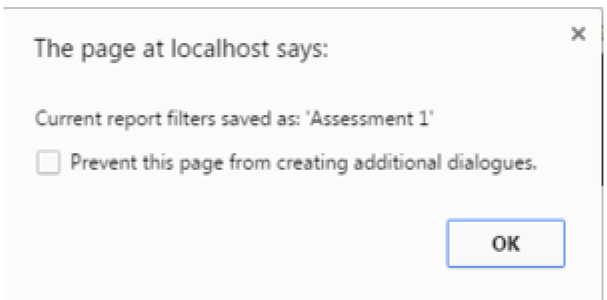
Once the filter has been saved it will appear in the **Test Result Filter** box.



To save the filter for future use, click on **Save Filters...** and give the filter a new name.

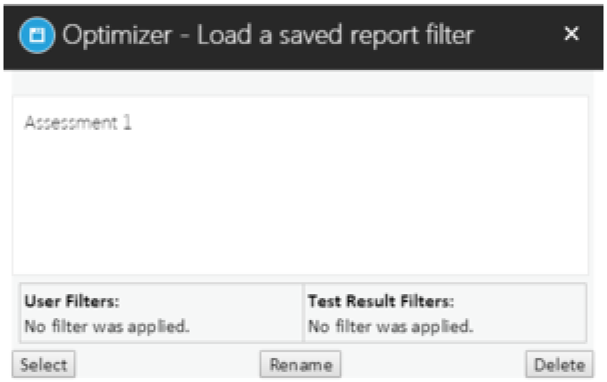


A Notification screen will appear once the filter has been changed.

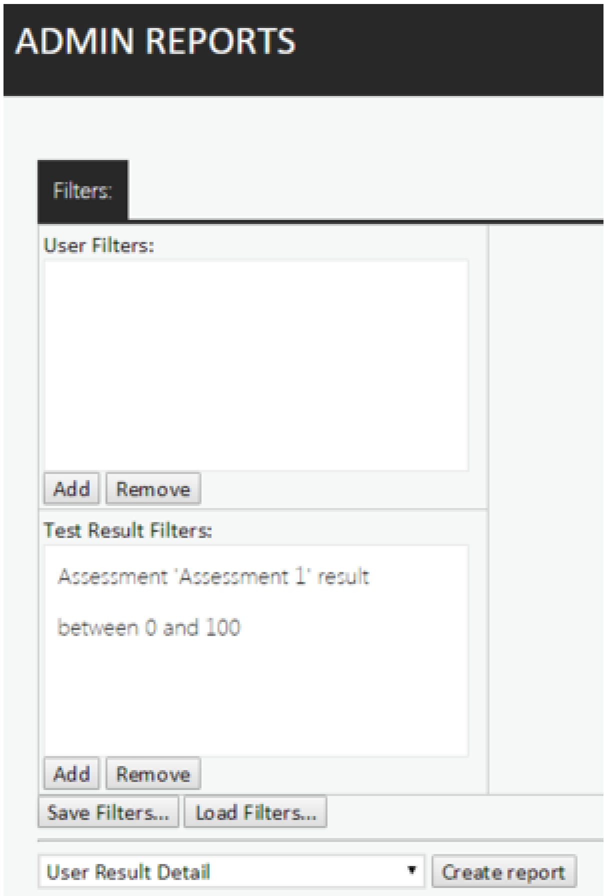


Loading Report Filters

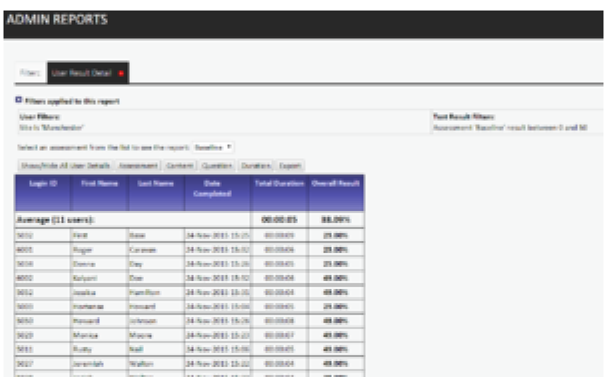
Filters are enabled for use and selection by clicking on **Load Filters**. The available saved filters are presented. Highlight the desired filter and then click on **Select**.



The filter then appears in the relevant filter box.

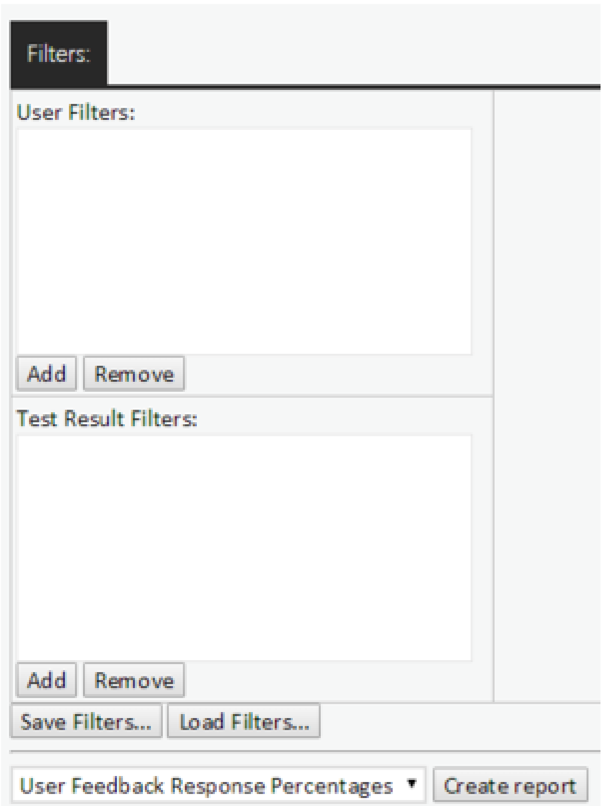


Select the report type (e.g. **User Results Detail**). The filter information will appear as part of the report selection after clicking on the report at the top of the screen:



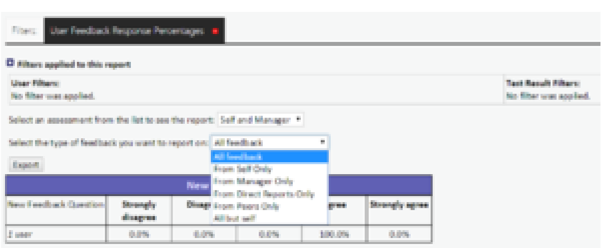
User Feedback Response Percentages

Select the **User Feedback Response Percentages** report from the drop down box and select **Create Report**.



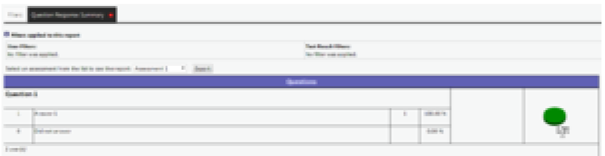
The report will appear at the top next to the **Filters**.

Select the relevant assessment. There is also the option to select the type of feedback to view from a drop down box.



Question Response Summary

The Question Response Summary allows immediate visibility across an assessment for all of the results by question within an assessment (date filters may be used to reduce the volume of answers).



Results from this report can be exported to a PDF file. This can be done by selecting a report from the dropdown and clicking the **Export** button.

Admin Report User Filter – Hierarchy

You can use the organizational hierarchy as a filter within the Admin report by selecting the **Add Filter** button under the **Edit User Filter** section of the **Admin Reports** page.

300px

You will then be presented with a drop down as displayed in the example below:

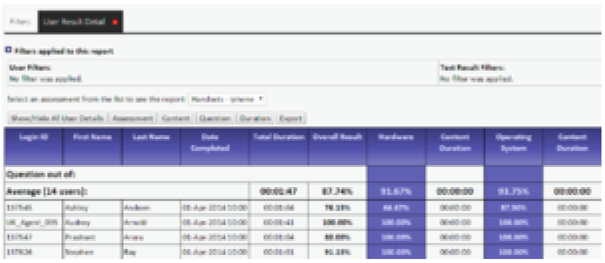
300px

The hierarchy will then be presented to either expand it as required and select the relevant nodes or select a specific position. To include any subordinates simply increase the number of **levels** as required.

Click on the **Save** button to apply the filter for reusing at a later date. To select and use an existing filter select **Load Filters** and click on the required filter or to remove a filter click on the filter name and after selecting it click on **Remove**.

Duration Column within the User Result Detail Report

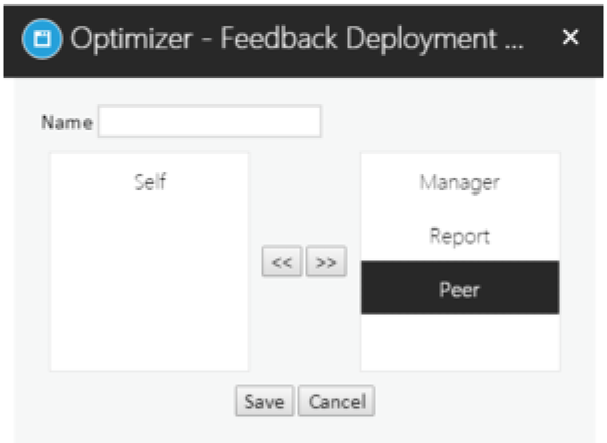
Duration of time spent (overall and by content) on an assessment is included within the **User Result Detail** admin report. This report also includes the overall average duration of for all selected users.



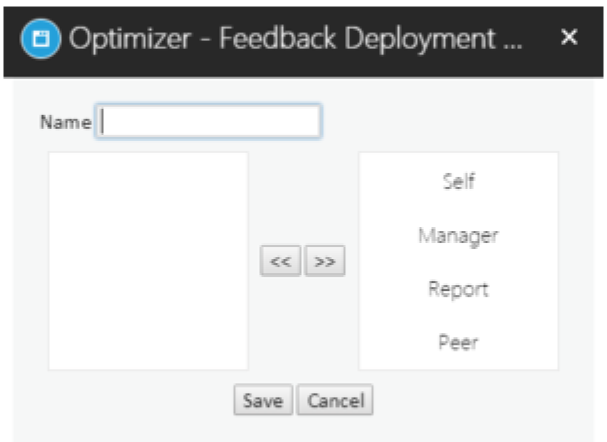
Feedback Deployment Models

This page allows the creation of feedback models which may be selected as part of the properties option of an assessment.

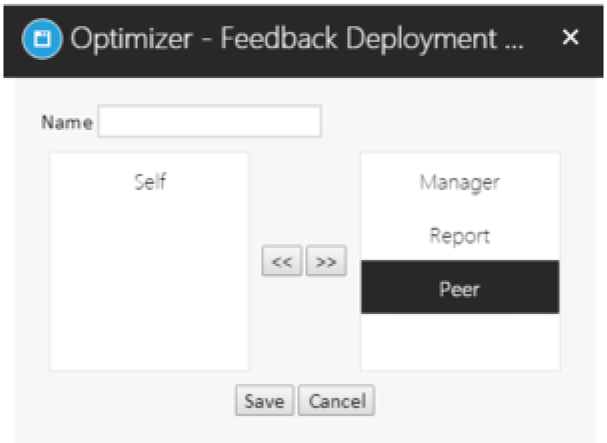
In the example below, the standard feedback models (Self and Self & Manager) are available.



To create a new feedback model for use in a feedback assessment, click on **Add** and additional options will be available to select from to build another profile.

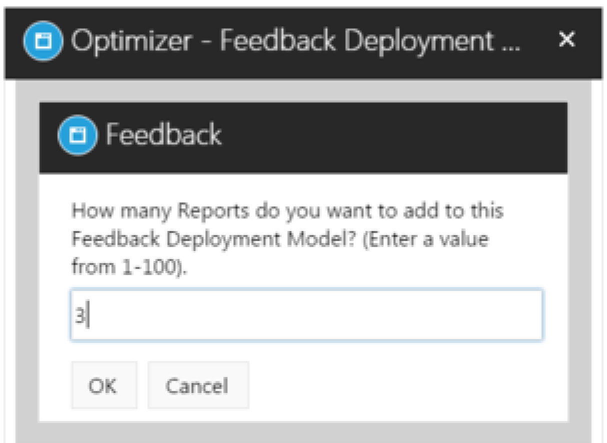


To create a new feedback model, select the desired options (individuals who will have access to the assessment) and move them across to the left-hand box.



If **Reports** is selected, the number of Reports will be requested.

Enter the number of Reports and click on **OK.**



Once the new feedback model has been created click on **Save** for it to be available to be used in feedback assessments within the assessment properties.

Managing and Viewing Crystal Reports

Performance DNA supports importing and viewing custom-designed Crystal Reports. Users can create an in-house Crystal Report by using specific reporting parameters. The features associated with Crystal Reports are located in the Manage Reports, Report Categories and View Reports pages.

Note: The new Crystal Reports functionality is only supported for Internet Explorer version 8 or above and the latest versions of other browsers (e.g. Chrome, Firefox and Safari).

Reporting Parameters

You can create in-house Crystal Reports in Skills Management by writing your own report queries.

The following parameters allow you to build your report query:

- **UserID** - use this parameter to pass the current user's Skills Management UID. Using this parameter refines the search such that only the data related to the user is returned.
- **TenantID** - use this parameter to pass the current user's Tenant UID. Using this parameter refines the search such that only the data related to the Tenant to which the user belongs is returned.
- **fnCleanHtml** function - use this function to remove the styling tags from formatted text as Crystal Reports doesn't support some of the styling tags. Using this function removes the styling tags from text fields like **Assessment Questions and Answers** and enables Crystal Reports to display the plain text. The cleaned up text fields are then formatted within the report.

To use the **fnCleanHtml** function, replace the formatted text field in the report's database query with the following code:

```
dbo.fnCleanHtml(<database field name>)
```

Managing Report Settings

The Manage Reports page allows users to create, edit, delete and re-arrange report categories. Reports can then be associated with specific categories.

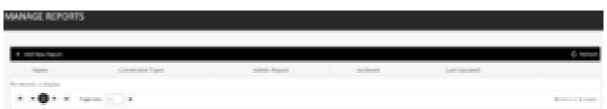
To create a new category, first select the parent category (i.e. the one that you want the new category to be under in the hierarchy), then click the green ‘+’ icon.

Clicking on the new category twice will allow you to rename it. It is also possible to move categories to different locations by dragging them into other categories.

To delete a category, select it from the hierarchy and click the red ‘X’ icon. If the delete icon is disabled (if it is greyed out instead of red) then the selected category cannot be deleted. A category can be deleted only if it does not contain any other categories or reports.

Managing Reports

The manage reports page allows the user to view, add, edit, delete and archive reports. The main controls in this page are displayed in the following screenshot:



To upload a report, click the ‘Add New Report’ link. A dialog box will appear. Set the report’s name and category. The ‘Admin Report’ checkbox makes the report available to administrators only and allows them to run the report against all users in the system. Reports that are not set as admin reports will only provide information about the logged in user’s subordinates. Click the ‘select’ button to choose a Crystal Report .rpt file to upload.

Once the upload has completed, two additional settings will need to be defined. The connection type checkboxes should be used to set which users you want the report to run against. It is possible for a report to run against Performance DNA and Training Manager and any combination of the two different databases. The second option should be used to map the report database to the name of the database used for your system. After entering these settings click the ‘Add’ button to complete the report upload.

Note: In certain cases it is possible for users to upload Crystal Report files to the web server without completing the setup of the report item in Performance DNA. This will result in the report file being retained by the server; however, it will not be accessible via Performance DNA. These files will be prefixed with ‘TEMPFILE’ and may be manually deleted from the server’s Crystal Reports upload folder by administrators.

To edit report settings, select a report from the table in the Manage Reports page and click its associated ‘Edit link’. A dialog box will appear allowing you to change the details of the report, including name, category, the Crystal Reports .rpt file and database connection details. Once you have finished editing the report click the ‘Update’ button to apply the changes.

To archive a report, click its associated ‘Archive’ link from the table in the Manage Reports page. An archived report can be unarchived in a similar manner. Reports that are archived will not be listed in the ‘View Reports’ page.

All uploaded reports can also be downloaded via the ‘download’ link from the Manage Reports page.

Viewing Reports

Reports can be generated from the ‘View Reports’ page. The page will initially display the category hierarchy, including the reports that have been allocated to each category. Browse the category hierarchy and select the report that you want to view. A Crystal Reports popup window will appear. Depending on how the report was developed, this window will either show the report immediately, or request additional information before displaying the report.

Restricting Report Results

If you wish to restrict report results so that only the details of the logged-in user’s subordinates are displayed, the Crystal Report will need to include a UserID parameter. This parameter should have the ‘Show on (Viewer) panel’ attribute set to ‘Do not show’.

Note: Omitting this parameter will cause report results to include data about all Performance DNA users, regardless of the access level of the logged in user.

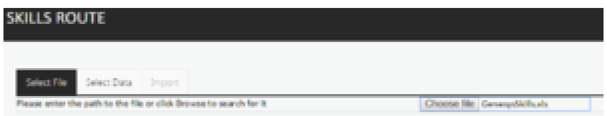
Skillsroute

Skillsroute allows the management of bulk changes (inserting new employee, adding and updating skills and adding and updating proficiency levels) in Genesys CME

The prerequisites GIS 7.5 & CME 7.5 on the server.

Select the Skillsroute page, as shown in the example below.

Browse and select the relevant spreadsheet containing the data for updating Genesys.



The spreadsheet must be created in the format as per the example below and be in Excel 97 – 2003 format file (.xls). The actual format of the information (skill names, Employee ID label, etc) will be dictated by what is already in CME.

The Skill levels in the example below are displayed as Bronze, Silver and Gold, with the proficiency levels associated to the employee as 1, 2 or 3 (in this example 1 is the highest proficiency level).

The proficiency levels used reflect actual organizational skill routing proficiency settings.

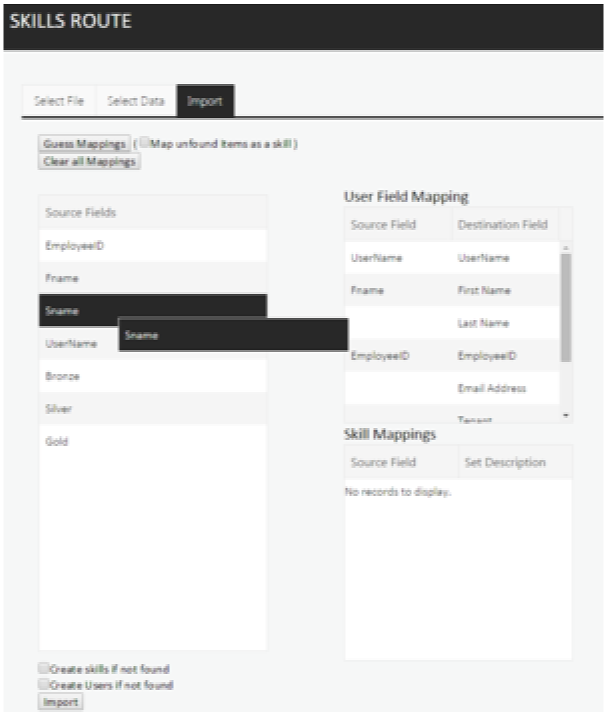
To create a new employee, the employee details are entered under the first four column headings as per the example below and the format must match the existing information in CME.

Skills are added in the columns after the Employee ID, First Name, Last Name and User Name and the proficiency level associated with the Skill is entered in the cell against the relevant employee.

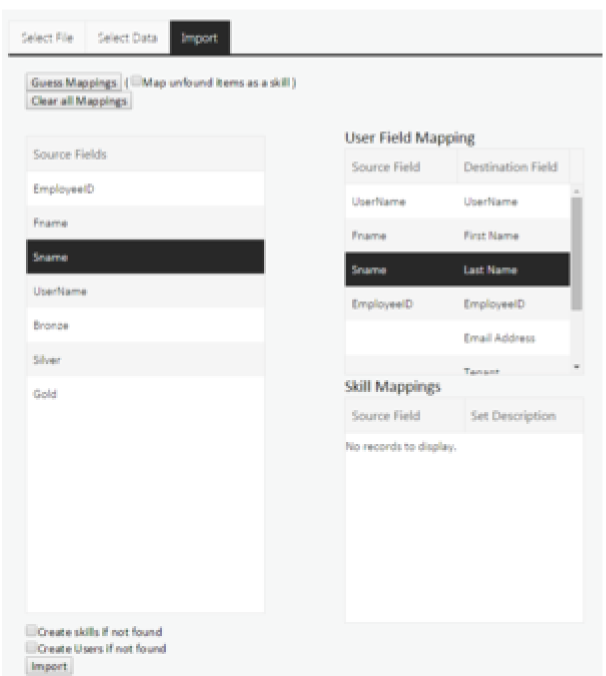
Employee ID	First Name	Last Name	User Name	Bronze	Silver	Gold
jhiggins	Joanne	Higgins	jhiggins	1	2	3
jparker	Jerry	Parker	jparker	2	3	3

After selecting the file, click on **Select Data** to confirm the information is correct.

Map the **Source Fields** to the **User Fields** by dragging and dropping the information across.



Once the mapping has been done, select the relevant options at the bottom and click on **Import**. The information will then be updated in CME.



SkillsDNA Creation

Before DNA Sequences and Strands can be created DNA Base Data must be defined and KPI data imported. The DNA Base Data and KPI data is also used in the SkillsAnalysis page for correlation analysis.

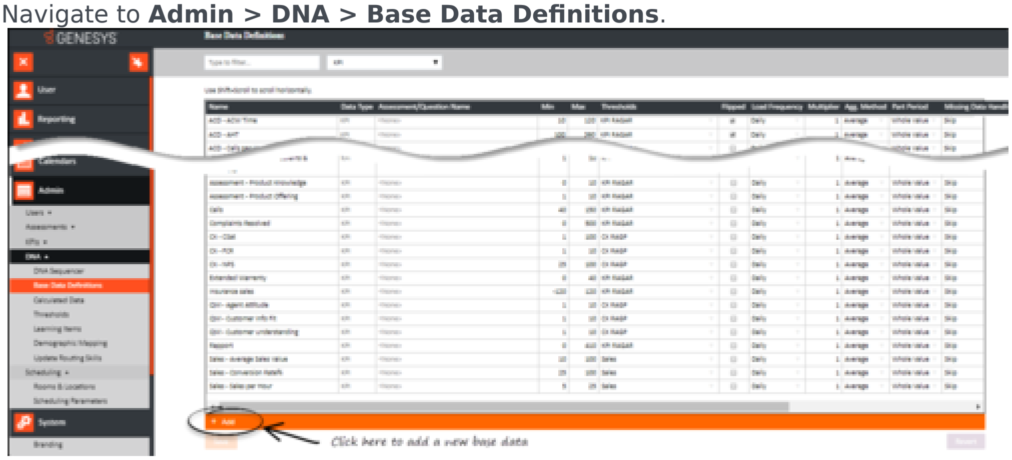
Manually Managing DNA Base Data

You can define the basic data types from the **DNA Base Data Definitions** page which will be used to create DNA Strands. Performance DNA supports three types of DNA Base Data, they are as follows:

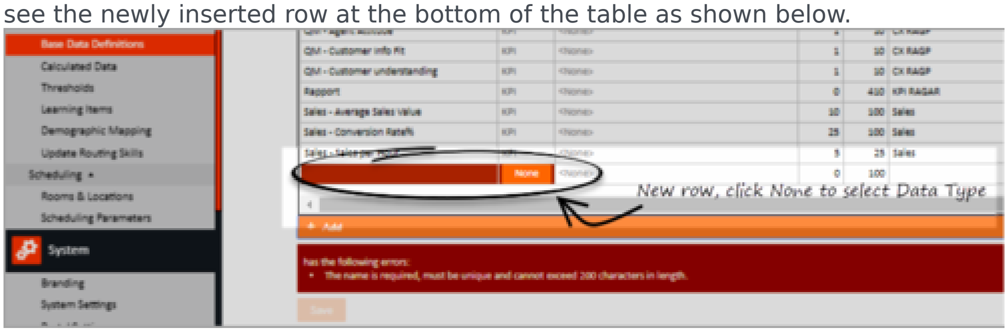
1. **Assessments** – Imported Assessment scores (historical) or Assessment data from a 3rd party system.
2. **KPI** – Imported Key Performance Indicators and other Performance data.
3. **Questions** – Imported from Assessments, but scored by the chosen question.

To create a new DNA Base Data,

1. Navigate to **Admin > DNA > Base Data Definitions**.



2. On the **Base Data Definitions** page, you will see a list of Base Data already configured in the system. If you want to create a new Base Data, scroll down to the bottom of the page and click **+ ADD**. You can see the newly inserted row at the bottom of the table as shown below.



3. Click **None** in the **Data Type** column, you will see a modal window.
4. On the **Choose Data Type** modal window, select the Data Type for the Base Data you are creating. You can select:
    - KPI
    - Assessment or
    - Question

5. Click **Next**.
6. Based on the **Data Type** selected, the values you enter might differ, see Data Type Definition to know what values are changing. Enter the data type specific values and click **Finish**. Your new Base Data will be added to the existing list.
7. Specify other details by referring to Base Data fields.
8. Click **Save**.
9. Click **Revert**, if you want to cancel and redo the definition.

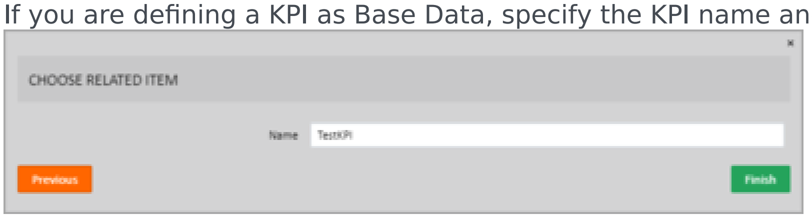
> **Important**
> The Base Data Definition table works like a standard spreadsheet. If you want to edit a Base Data, edit the values right away in the table and click **Save**.

Data Type Definition

This section explains how you define your Data Type values for different Base Data.

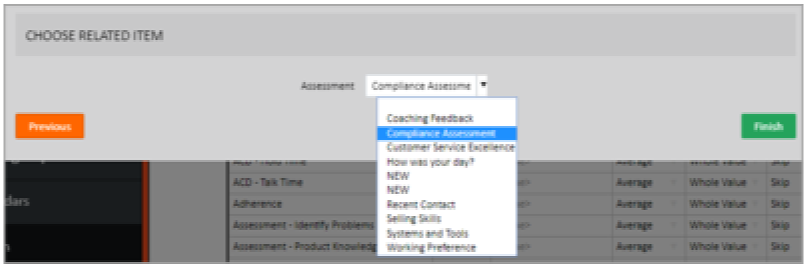
For KPI

If you are defining a KPI as Base Data, specify the KPI name and click **Finish**.



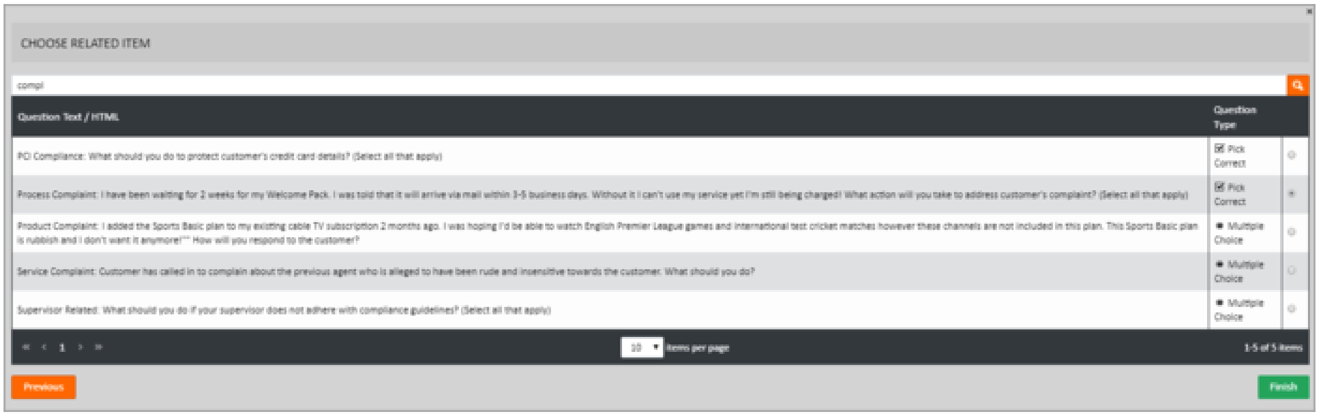
For Assessments

If you are defining an assessment as Base Data, you can choose the assessment name from the drop down and click **Finish**.



For Questions

Questions are part of an assessment. If you are defining a question as Base Data, you must first search the question from the list of questions, select the required question using the radio button and click **Finish**.



Important

If you do not remember any keyword for searching a question, you can directly click the search icon to retrieve all the questions.

The Question values will be taken only when the Assessment which has the question is in *completed* status. The values are not displayed if the test is *partially completed*. The values are open ended (no end date) but will update when the question has been answered in later completed assessment.

Base Data Fields Description

For the Base Data, provide a unique Name, description and then configure the remaining information as required, including:

- **Name** – this must be a unique name. In environments with several measures of similar names best practice would be to prefix the name with the business area i.e. Sales – AHT, Email – AHT. For Questions, you can edit the automatically populated name with a shorter name.
- **Assessment Name** – this links the imported value to a specific Assessment within the system. To select the Assessment, you can either start typing the name and select the Assessment from the auto filtered list, or you can select the Assessment manually from the drop down list.
- **Min (value)** – this is used to normalize the lowest value expected for the KPI. For example, if you enter 5 as the default minimum value, any imported values that are less than 5 will be rounded up to 5. For Questions, this value is set as `0` and you cannot edit it.
- **Max (value)** – this is used to normalize the highest value expected for the KPI. For example, if you enter 100 as the default maximum value, any imported values that are greater than 100 will be rounded down to 100. For Questions, this value is set as `100` and you cannot edit it.
- **Thresholds** – this allows you to assign a previously created Threshold to this base data definition*. If there are no Thresholds available, this column will just show “<None>”.
- **Flipped*** – by default Performance DNA assumes that higher scores are indicative of better performance (‘better’). In some cases, like Average Handle Time (AHT) or Hold Time (HT) lower values are normally considered better. By checking this option, the system treats lower scores as better.
- **Load Frequency** – From the dropdown select if the Base Data is measured, and imported, at a Daily,

Weekly or Monthly level.

- **Multiplier** – this is used to set the Load Frequency recurrence.
  - 1 means the data is expected every Day, Week or Month
  - 2 would indicate the data is expected every 2nd Day, Week or Month
- **Agg. Method** – defines the aggregation method used when reporting on this data. The options are:
  - **Sum** – the values are added together
  - **Average** – the values are averaged
  - **No Aggregation Allowed** – if the reporting period is larger than the data frequency, then no value will be available for this item. (i.e. if you try to view a “daily” data item for a reporting period of more than one day)
- **Part Period** – defines how data is reported when the data frequency is smaller than the reporting period (i.e. reporting for a week when the data is imported monthly). The options are:
  - **Whole Value** – uses the value for the period in its entirety
  - **Fraction –** scales the value for the data to the fraction of the reporting period that it falls within (i.e. a weekly value of “7” would score “1” for a single day)
  - **Reporting not allowed –** if the reporting period does not match the data frequency, no value will be available for this item.
- **Missing Data Handling** – defines what data is to be used if there is gap in the imported values. The options are:
  - **Default Value** – User defined default value
  - **Skip** – Just use the data that is in the system
  - **Do Not Calculate** –No value is used if there is missing data for a Base Data Definition.
- **Value** – this is the user defined value that will be used if there is missing data for this Base Data Definition.
- **Precision** – The number of decimal places that this Base Data Definition should be reported to.
- **Aliases** – These are additional names related to a specific Base Data. These names are used to match the KPI name while importing the KPI data through the KPI uploader.

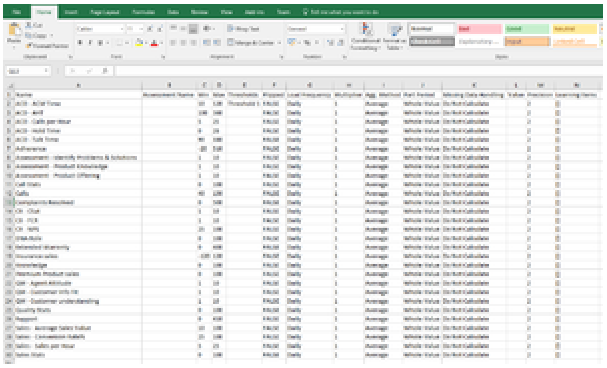
* When **Flipped** is checked, the lower end of the data value range aligns with the upper end of Thresholds, and vice-versa.

Note: Once a valid and unique name has been created the validation error will be removed.

Once you have configured the Base Data details click **Save** to create the Base Data. If there are any validation errors these will be shown below the Base Data Definitions grid.

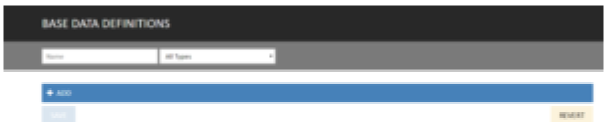
Managing Base Data Definitions with Excel

For environments with many Base Data Definitions it is possible to replicate the Base Data Definitions grid within a spreadsheet and copy them into Performance DNA.

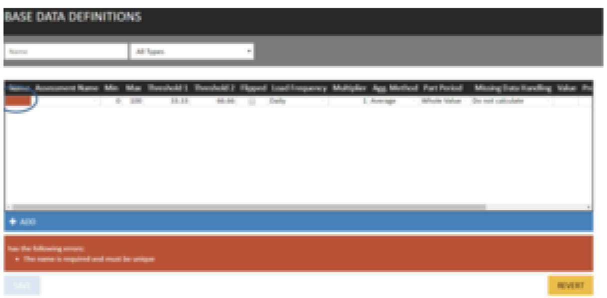


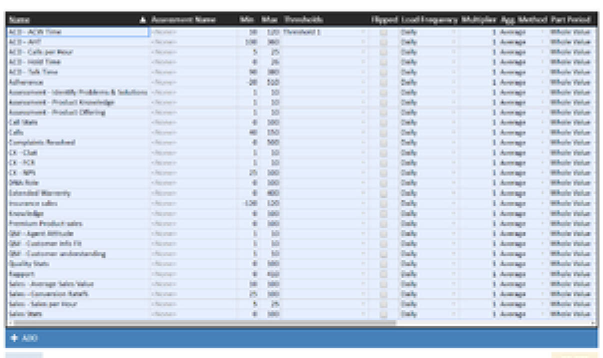
Creating New Base Data Definitions from a Spreadsheet

To copy Base Data Definitions from your spreadsheet you will need to create a new entry line in the Base Data Definitions grid by Clicking the **+Add** button.



Copy the Base Data information from your spreadsheet and select the highlighted cell on the Base Data Definitions grid using Ctrl+V to paste the data.



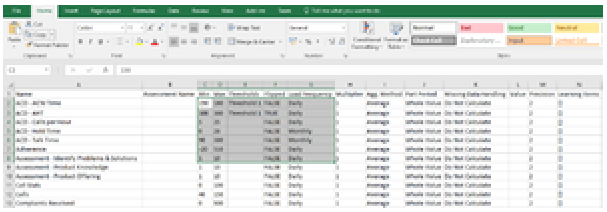


After sense checking the data click **Save** to create the new Base Data Definitions.

Note: For optimum performance, it is recommended that Base Data Definitions are pasted and saved to the grid in batches of 50.

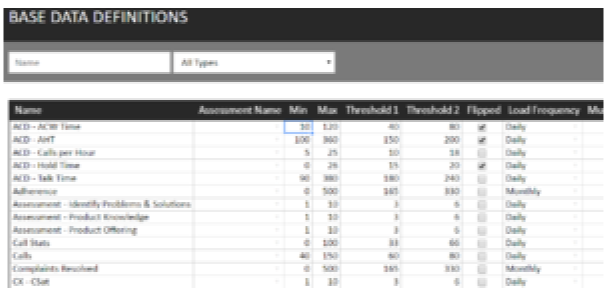
Updating Base Data Definitions from a Spreadsheet

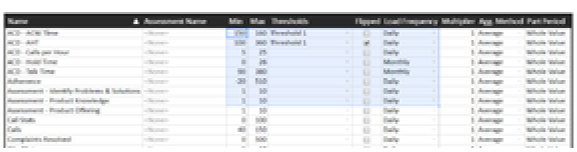
Over time Base Data targets may change. After updating your Base Data Definitions spreadsheet to reflect these trends or business changes it is possible to copy and paste sections of the data to reflect the changes in Performance DNA.



Select the Cells that have been updated in the spreadsheet and copy them.

From the Base Data Definitions grid select the first cell of the data range that is to be updated and paste the data using Ctrl+V.



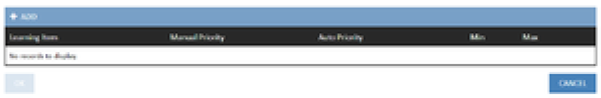


After checking for any validation errors click **Save.**

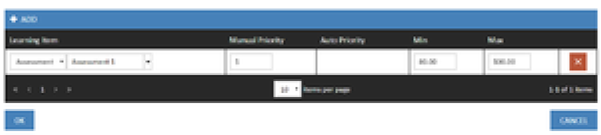
Learning Items

Each base data definition can be linked to multiple Learning Items.

The number in the Learning Items column represents the count of learning items associated with the base data definition. Clicking on the number opens the Edit Learning Item screen.



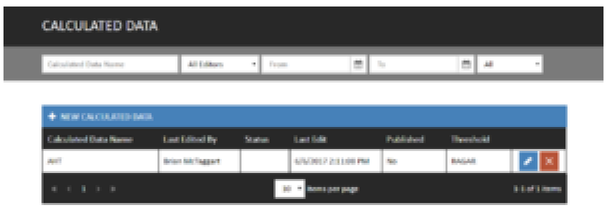
Clicking **Add** will add a learning item.



You can add as many as you like. Auto Priority is reserved for a future feature. Manual priority is the order that you would like the learning items to be assigned. Min and max are the range used to determine When the learning item will be assigned. So, in the example above, if you score between 80 and 100 in Assessment 1 then the learning item will be assigned.

Calculated Data

The Calculated Data page supports the creation and management of DNA Calculated Data. Calculated Data consist of a formula which can include arbitrary numbers and KPI Base Data as the operands. Calculated Data can be used within DNA strands in the same way as KPI Base Data. Calculated Data are useful if DNA strands are insufficient to provide a combined score from multiple KPIs. As with KPIs and Strands, each DNA user will have a score for the Calculated Data based on the formula and their KPI scores. To manage Calculated Data, browse to the **Admin -> DNA -> Calculated Data** page in the menu.



The grid shows you key information about each of your calculations. To see the detail on the calculation, you must click the Edit button for that calculation.

Note: If you have any calculations that were created prior to version 4.9, you must edit each of the calculations and provide values for the **Min**, **Max** and **Precision** values (and optionally a threshold) before they will provide a value for DNA.

Searching and filtering Calculated Data

The top of the Calculated Data page includes a search bar and filters to restrict the number of Calculated Data based on entered criteria.

The first box at the top of the page supports searching of Calculated Data for specific criteria. Entering a value into the Calculated Data search box will result in the page removing all Calculated Data which do not contain the value in the Base Data’s name. The search results are updated automatically while value is being input; there is no button to begin the search.

The second item at the top of the page allows for the filtering of Calculated Data based on the editor. Selecting an editor from this drop-down will remove any Calculated Data that were created by other users.

The third and fourth controls at the top of the page allow for the filtering of the view of Calculated Data to just the items that were last edited in the specified period (using the ‘from’ and ‘to’ date picker controls).

The last item at the top of the page allows for the filtering of results based on whether items are published/unpublished. This option is set to ‘All’ by default. This control can be used if you only wish to see published or unpublished Calculated Data.

Calculated Data Status

The Calculated Data page includes a status bar under the searching and filtering features. This bar shows how many published Calculated Data are in each state of processing.

The allowed states are:

- Successfully Processed
- Awaiting Processing
- Processing, Completed with Errors
- Failed

By default, the processing of Calculated Data occurs automatically every minute (**Note**: there is no option to manually process Calculated Data). This will only occur if there is new KPI data or new Calculated Data have been published since the last time the Base Data were processed. Users will not have a value for Calculated Data until the Base Data has been published and processed.

View of Calculated Data

The main part of the Calculated Data page includes a table listing the Calculated Data for the current database. This view may not include all Calculated Data depending on whether a search value has been specified or if any of the filters are set to non-default values.

The table includes columns for:

- Calculated Data Name
- Last Edited By
- Status
- Last Edit
- Published

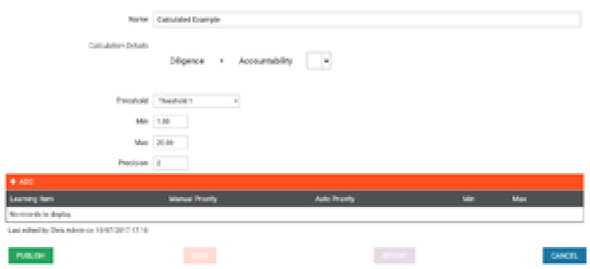
The last column includes controls for edit and delete (**Note**: the delete control isn’t available once a Calculated Data has been published).

The bottom of the page includes paging controls on the left side, a drop-down control for selecting the number of items that should be displayed per page, and the number of Calculated Data available.

The top of the table includes a button that allows for the creation of new Calculated Data. The table headers also support sorting, clicking multiple times will cycle through ascending/descending order for the selected column.

New Calculated Data Form

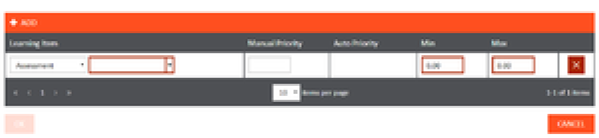
To create a new Calculated Data, click the '+ New Calculated Data' at the top of the table of Calculated Data. The form includes a name field (a value must be provided for this field) and a section for calculation details. The calculation details section initially includes a drop-down control.



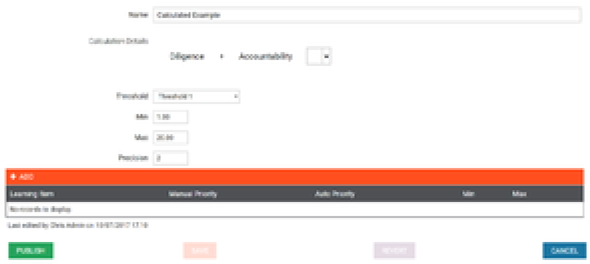
It is possible to either type numbers/operators/KPI names into this control directly or use the down arrow to view and select the available options. Clicking the down arrow will display available operands, brackets, and KPIs. Pressing the space bar will create the first element of the formula based on what was entered/selected and set the cursor focus to a new dropdown control to the right of the first element. Once you've created multiple elements, it is possible to edit them by double-clicking to move the focus to the element and enable the drop-down control.

Below the calculation, you can select an optional Threshold to apply to this calculation. You must also select an aggregation method from the list (the default is **Average**) and provide the minimum (**Min**) and maximum (**Max**) values that will be considered for reporting purposes. The **Precision** value determines how many decimal places will be used when displaying the results of this calculation.

The **Learning Items** grid allows you to add Learning Items to the learning calculated data, and clicking **Add** will allow you to add a new one.



It is possible to add any number of learning items. The Manual Priority is which order you would like the learning items to be assigned, Auto Priority is not currently used at the moment, and Min and Max determine when the learning item will be assigned.



The bottom of the page includes Publish, Save, Revert and Cancel buttons. The **Publish** button immediately saves and publishes the formula. The **Save** button saves the currently specified formula so that it is available for editing in the future. It is possible to save a rule that is syntactically invalid. The publish button, however, is only enabled if the formula is valid (i.e. valid syntax). If you open an existing formula, make changes, then click the **Revert** button, the formula will be changed back to the last previously saved state. Clicking the **Cancel** button undoes all changes made to the formula if it is an existing formula or cancels the creation of a new formula.

Once a formula is published it will be added to the queue of formulas that require processing. Users will have a value for the Calculated Data once the formula has been processed. Editing a published formula will display the published version of the formula at the top of the screen, with the editable version below it.

Notes:

Only **Published** Calculated Data can be added to DNA strands.

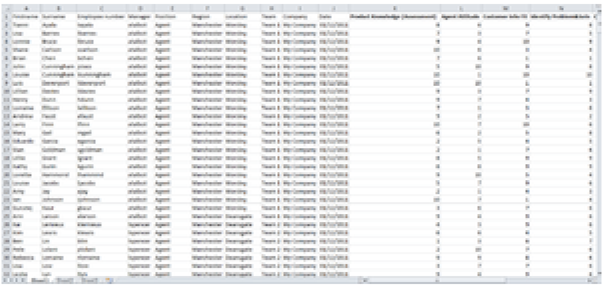
Published Calculated Data cannot be deleted.

Once a Calculated Data has been published, it can still be edited; however, it must then be re-published for the changes to take effect.

Import KPI Data

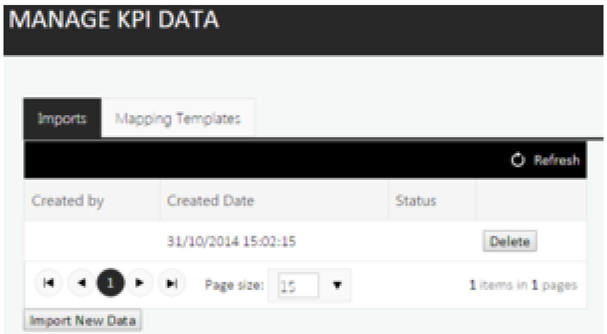
This is the data spreadsheet that will be imported into Performance DNA to create the DNA blocks and to use in the Correlation Analysis page.

In the following sample, there is a unique identifier for the individual, a date and associated data.



Manually Importing KPI data

KPI data is manually imported into Performance DNA by selecting the **Import KPI Data** page and clicking on **Import New Data**., as shown below.

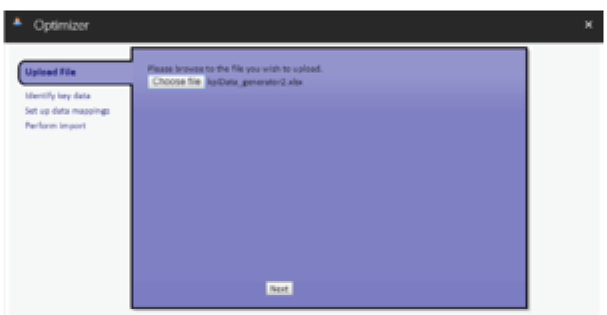


Use this process to upload any new data.

Note: The ability to archive KPI imports has been removed from version 2.7 onwards. Any KPI imports which were archived prior to an upgrade will be un-archived.

Next, the Import Wizard will appear, as shown in the following example.

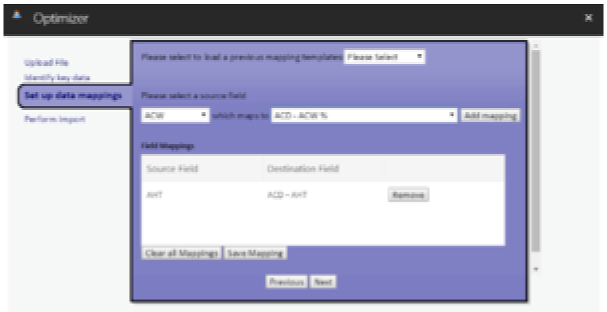
After selecting the file with the KPI data, click **Next**.



From the drop down box select the sheet that contains the data that you want to import and Map the required fields to the corresponding Spreadsheet column headers.

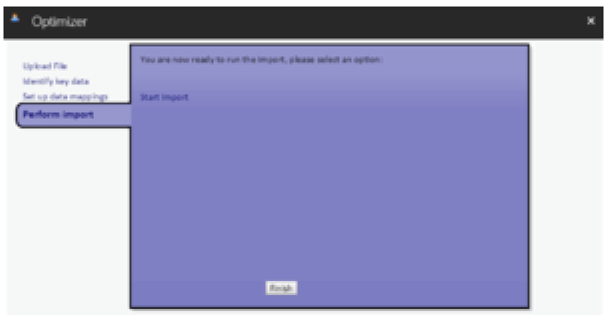
Click **Next** once mappings are completed.

Select the relevant source filed and the BaseData it maps to from the BaseData created previously



After selecting **Add mapping** the selected source and destination fields will appear within the **Field Mappings** list. Repeat this process until all of the KPIs on the spreadsheet have been mapped to their corresponding DNA Base Data.

To save the mapping template to reuse for future data imports, click **Save Mappings**.



Any saved templates will be available from the ‘Please select to load a previous mapping template:’ dropdown list for future imports.

Click **Next** to navigate to the import process.

Click **Start Import** to import the data.

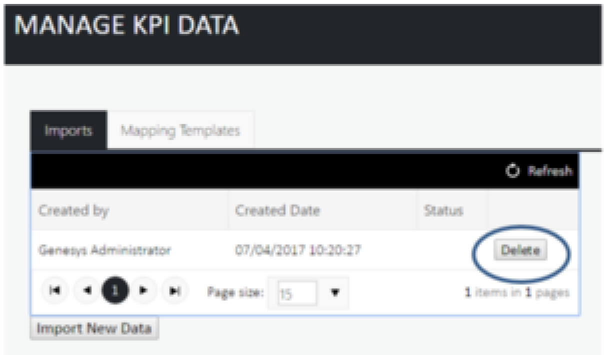
Note: clicking Finish at this stage will not import the data and you will need to start the process again**.**

Once the import has been completed you are safe to click **Finish**.

The data import will then show in the import log.

Deleting Previously Imported Data

Previous import files, and the corresponding data can be manually deleted using the **Manage KPI** page by clicking the **Delete** button next to the import file details.



Automatically Importing KPI Data

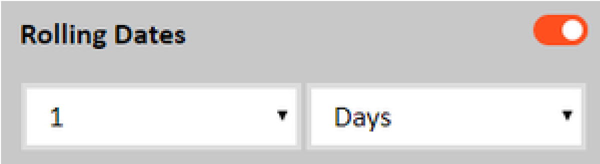
The process of importing KPI data can be partly automated via the KPI Import Service. Once you have installed and configured this service (there is an xml file for configuration) it is necessary only to copy a KPI import file into the defined import folder. The service will automatically recognize that a file has been added, process the import and then move the file to the archives folder. Xlsx and csv files are supported. An import template will need to be setup for this.

My DNA

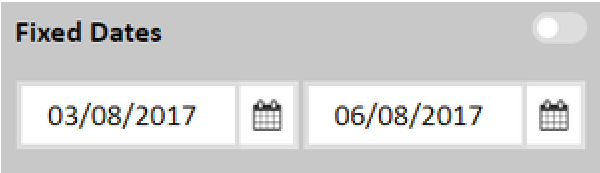
The **My DNA** page allows users to view their current scores for all assigned **Strands**. The data visualization supports drill-down.

Date Range

The data is filtered by a start and end date which can be selected using fixed dates or calculated as rolling dates. Use the button in the top right corner to toggle between the selections.



Rolling dates are calculated from the previous day minus the values selected in the dropdowns.



Data Visualization

The performance data is displayed as a series of partition charts with the selected **Strand** at the top level. Each demographic grouping will produce its own partition chart, with the title representing what percentile range they use, if any, and the demographic selection.

Clicking on the different parts of the **Strands** will zoom to that node and allow deeper structures to be explored. The colors used are taken from the defined **Thresholds**.

The values shown are the raw scores for the current user aggregated over the selected date window.

The button in the top right-hand corner toggles whether the chart is linked to the other charts. Linked charts will keep the same focus when navigating the **Strands** tree structure.

Data Issues

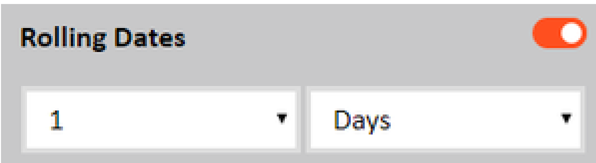
Should there be any issues with the date returned these will be shown in expandable summaries above each **Strand**.

DNA Comparison

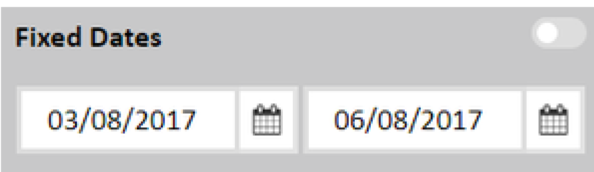
The **DNA Comparison** page allows users to compare aggregated scores across multiple user demographic selections.

Date Range

The data is filtered by a start and end date which can be selected using fixed dates or calculated as rolling dates. Use the button in the top right corner to toggle between the selections.



Rolling dates are calculated from the previous day minus the values selected in the dropdowns.



Strand Selector

The **Strand** dropdown will allow you to select a single strand for comparison.

User Selection

The **User Selection** filter allows a user to select one or more user demographics for comparison. The initial filter displays summary text and a count of any currently selected demographics. Clicking the count button will open a more detailed view of the filter for editing. The left-hand side of the dialog displays each demographic grouping that can be removed or added to using the **Cross** and **Add User Selection** buttons respectively.

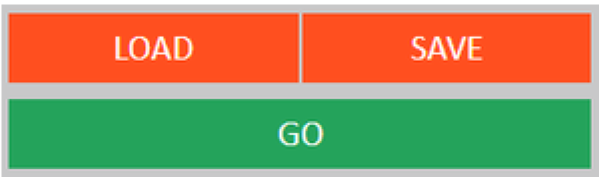
The right-hand side of the dialog displays the currently highlighted demographic grouping. Each grouping consists of a **Percentile Range** and zero or more **Demographic Mappings**.

The **Percentile Range** dropdown allows the users that match the demographic mappings to be filtered to pre-specified or custom ranges. The custom range option will display a range picker allowing the user to select a lower and upper percentage.

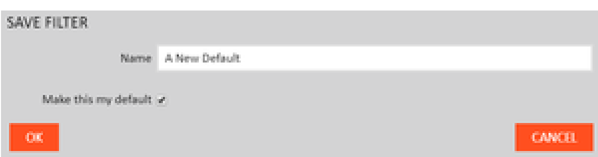
The **Demographic Mappings** can be chosen using the dropdown as well as being removed and added to using the **Cross** and **ADD FILTER** button respectively. Any selected values will be displayed at the top followed by the top 20 unselected values. The unselected values can be filtered using the textbox at the top of each result set. Additional data will only be retrieved from the server after 3 or more characters have been inputted into the filter textbox.

Loading and Saving Filters

Filters can be saved and set as a default for future use. A default filter will be automatically loaded when the page loads and only one filter can be set as a default per page. The loading and saving dialogs can accessed by selecting the **LOAD** and **SAVE** buttons.



The **Load Filter** dialog allows a user to select any of their saved filters for the current page. A filter can be loaded by selecting it from the dropdown and clicking the **OK** button. If **Make this my default** is checked then this will also make the selected filter the default for the page.



The **Save Filter** dialog allows a user to save a new filter or edit an existing one. Each filters name must be unique and if a filter with is saved using an existing filters name then it will replace it. If **Make this my default** is checked then this will also make the selected filter the default for the page.

Data Visualization

The performance data is displayed as a series of partition charts with the selected **Strand** at the top level. Each demographic grouping will produce its own partition chart, with the title representing what percentile range they use, if any, and the demographic selection.

Clicking on the different parts of the **Strands** will zoom to that node and allow deeper structures to be explored. The colors used are taken from the defined **Thresholds**.

The values shown are the raw scores for the current user aggregated over the selected date window.

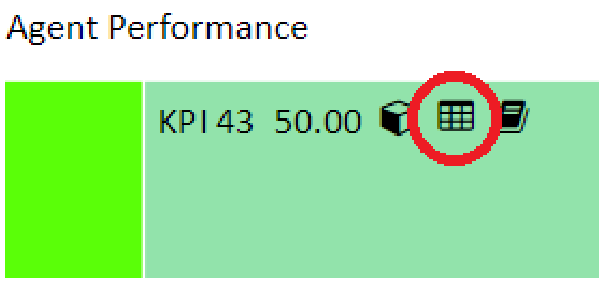
The button in the top right-hand corner toggles whether the chart is linked to the other charts. Linked charts will keep the same focus when navigating the **Strands** tree structure.

Data Issues

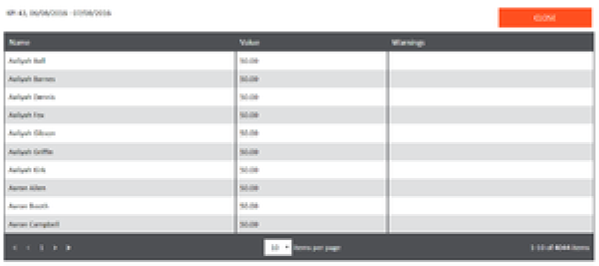
Should there be any issues with the date returned these will be shown in expandable summaries above each **Strand**.

User Drilldown

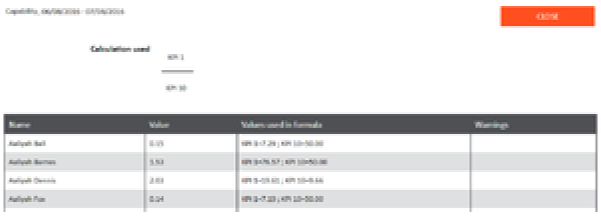
On the leaf nodes of the partition chart, there is a grid button that can be pressed to view a more detailed view of the



This will bring up a chart showing the strand name, the date range it applies to and all the users within the **Strand** with their individual warnings and errors, if applicable.



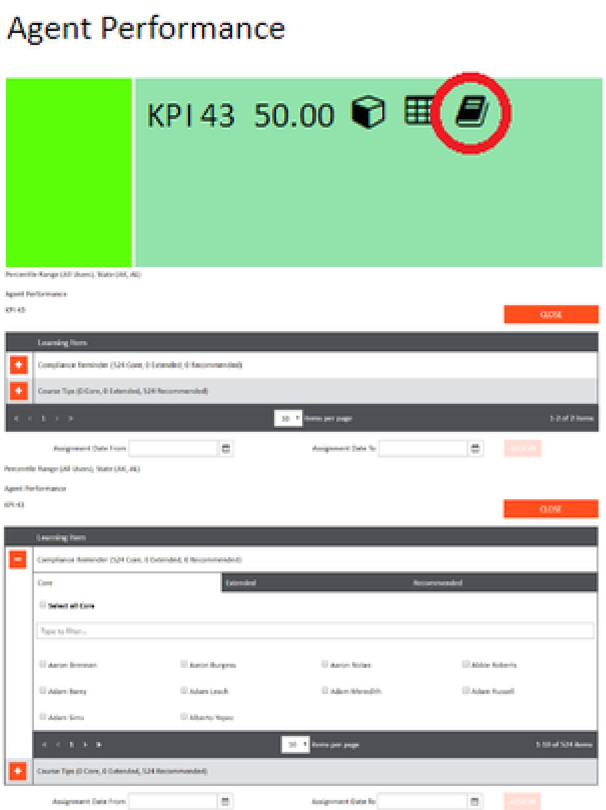
If the node is a **Calculated Component**, it will show the formula used and the components' raw values within the user row.



Learning Item Drilldown

If a node on the partition chart is a **Base Data Definition** or a **Calculated Component**, and has **Learning Items** assigned to it, a book will show up on the chart.

This will bring up a table with a list of all the **Learning Items** assigned to the node, where expanding allows users to be selected to have them assigned.



They are sorted into three categories based on how they score relative to the minimum and maximum bounds set when relating learning items to the BDD or calculated component:

- **Core** contains users who score above the maximum.
- **Extended** contains users who score under the minimum.
- **Recommended** contains users who score within the range.

The users in each tab can be filtered using the filter bar, and it is possible to select them all within their respective tab by using the select all checkboxes. All users show up in these tabs based on their scores regardless of whether they have the learning item already assigned or not, unchecked.

The dates can be set if required, but can be left blank.

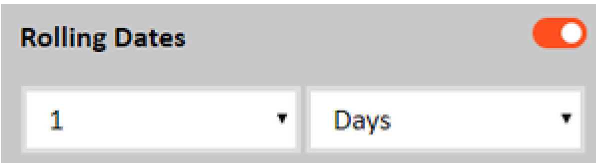
Assigning these uses pushes the assignments to be queued where it will be processed the next time the “Process Learning Items Queue” **Scheduled Task** runs. If a user already has the learning item assigned, re-assigning will update the date range, or if nothing has changed, not do anything.

DNA User Progress Graph

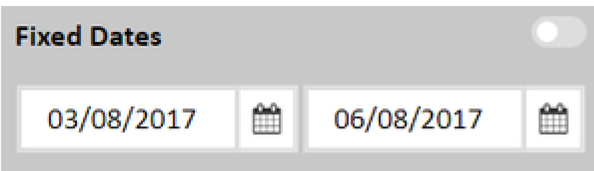
The **DNA User Progress Graph** provides a visual representation of up to ten users’ performance over time and any learning items they may have taken in that time.

Date Range

The data is filtered by a start and end date which can be selected using fixed dates or calculated as rolling dates. Use the button in the top right corner to toggle between the selections.

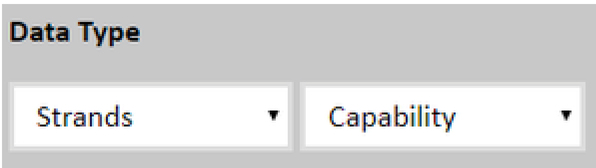


Rolling dates are calculated from the previous day minus the values selected in the dropdowns.



Data Type

The **Data Type** selector allows a user to select what kind of data they want to see (**Base Data Definition**, **Strand** or **Calculated Data**) and select from a list of those.

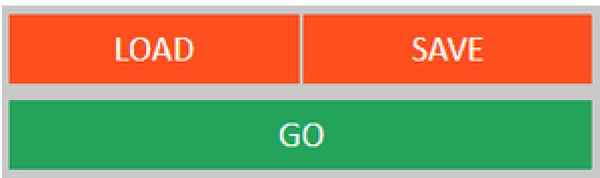


Users

The **Uses** selection filter allows up to ten users to be selected out of all the users in the system. Users can be filtered by their first name, surname and login Id.

Loading and Saving Filters

Filters can be saved and set as a default for future use. A default filter will be automatically loaded when the page loads and only one filter can be set as a default per page. The loading and saving dialogs can accessed by selecting the **LOAD** and **SAVE** buttons.

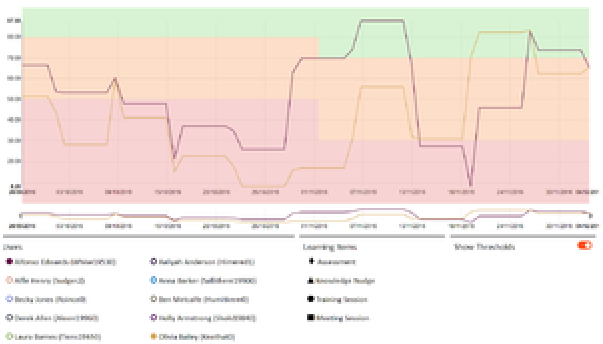


The **Load Filter** dialog allows a user to select any of their saved filters for the current page. A filter can be loaded by selecting it from the dropdown and clicking the **OK** button. If **Make this my default** is checked then this will also make the selected filter the default for the page.

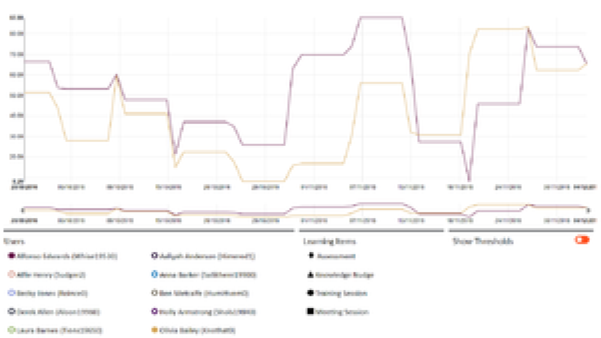
The **Save Filter** dialog allows a user to save a new filter or edit an existing one. Each filters name must be unique and if a filter with is saved using an existing filters name then it will replace it. If **Make this my default** is checked then this will also make the selected filter the default for the page.

The Timeseries Graph

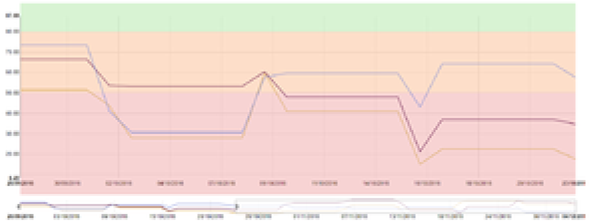
The timeseries graph shows the scores of the users selected, with their colors represented in the Users legend below it and learning items shown on the line, with the shapes corresponding to the Learning Items legend. The threshold is overlaid and shows which bands were active at the times on the graph.



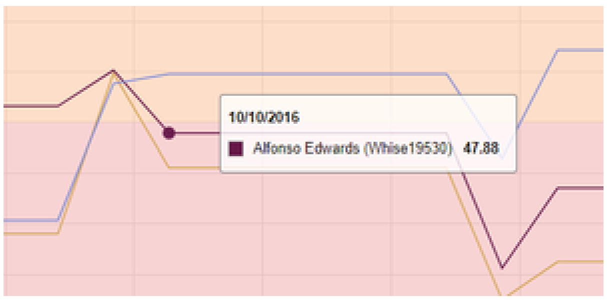
Users can be deselected by clicking on the round dot next to their name, so smaller selections can be compared without separate searches.



Thresholds can be toggled on or off using the “Show Thresholds” toggle under the bar.



A smaller time frame can also be selected by dragging the tabs at the ends of the mini graph below the main one, allowing for zooming in to times of interest.



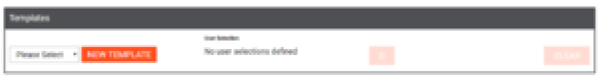
Hovering over the line also gives specific information on whose line it is, their score, and the date the score was taken.

Update Routing Skills from DNA

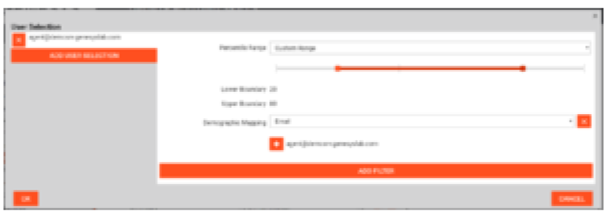
This page enables Skills and proficiency levels in CME to be updated for the SkillsDNA output.

The DNA components are presented in the left-hand side table and the CME skills in the middle table.

Templates are required to create links between DNA items and CME Skills and must be selected before continuing. Select a template from the dropdown or create a new one by clicking the **New Template** button.



The user selection becomes enabled once a template has been selected. If no user selection is defined then users who are linked to the selected Strands will be used.



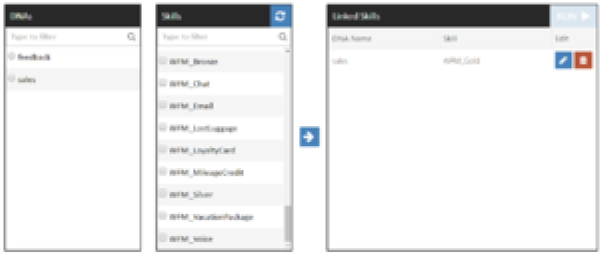
Clicking on the user selection count button will launch the user selection modal. The left-hand side of the dialog displays each demographic grouping that can be removed or added to using the **Cross** and **Add User Selection** buttons respectively.

The right-hand side of the dialog displays the currently highlighted demographic grouping. Each grouping consists of a **Percentile Range** and zero or more **Demographic Mappings**.

The **Percentile Range** dropdown allows the users that match the demographic mappings to be filtered to pre-specified or custom ranges. The custom range option will display a range picker allowing the user to select a lower and upper percentage.

The **Demographic Mappings** can be chosen using the dropdown as well as being removed and added to using the **Cross** and **ADD FILTER** button respectively. Any selected values will be displayed at the top followed by the top 20 unselected values. The unselected values can be filtered using the textbox at the top of each result set. Additional data will only be retrieved from the server after 3 or more characters have been inputted into the filter textbox.

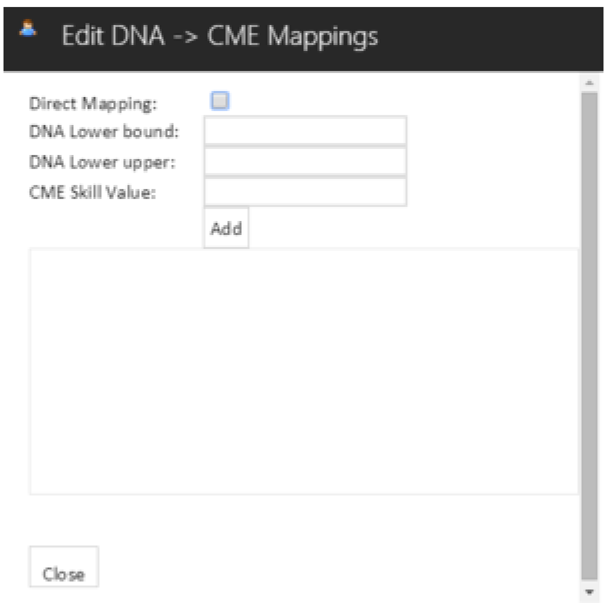
The DNA components and CME Skills need to be **linked** in the right table. In this example the **sales** DNA has been linked to the **WFM_Gold** skill. To link items, select the DNA from the left table and tick the related skill/skills in the middle table, then click the right arrow button.



Click the Edit icon in the Linked Skills table to specify whether skills are directly mapped or whether the DNA results provide a scale to match the proficiency levels in CME.

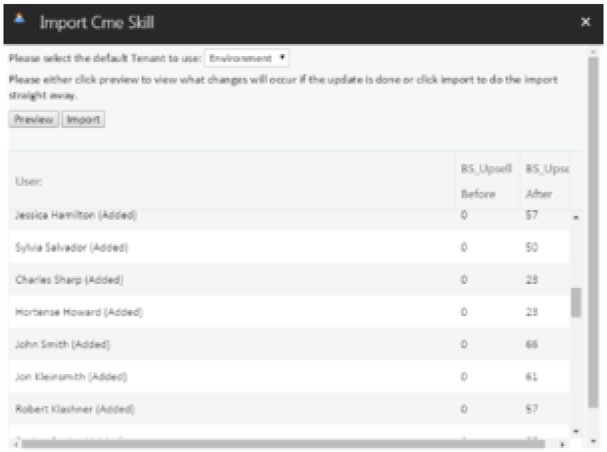
To use levels of DNA results for proficiency levels in CME, enter the DNA Lower bound and DNA Upper values and associate these with a level in CME associated to the Skill. Click **Add** once complete to create the required levels.

If there is a direct mapping select **Direct Mapping**.



Click **Run** to update the CME Skill levels.

Before importing the new Skill levels to CME you can preview the skill levels by clicking Preview. Once you are satisfied that the skill levels are accurate, click **Import**.


Import Cme Skill
Please select the default Tenant to use: Environment
Please either click preview to view what changes will occur if the update is done or click import to do the import straight away.
Preview
Import
User:
BS_Upsell Before
BS_Upse After
Jessica Hamilton (Added) 0 57
Sylvia Salvador (Added) 0 50
Charles Sharp (Added) 0 23
Hortense Howard (Added) 0 23
John Smith (Added) 0 66
Jon Kleinsmith (Added) 0 61
Robert Klashner (Added) 0 57

Branding

This section explains branding options.

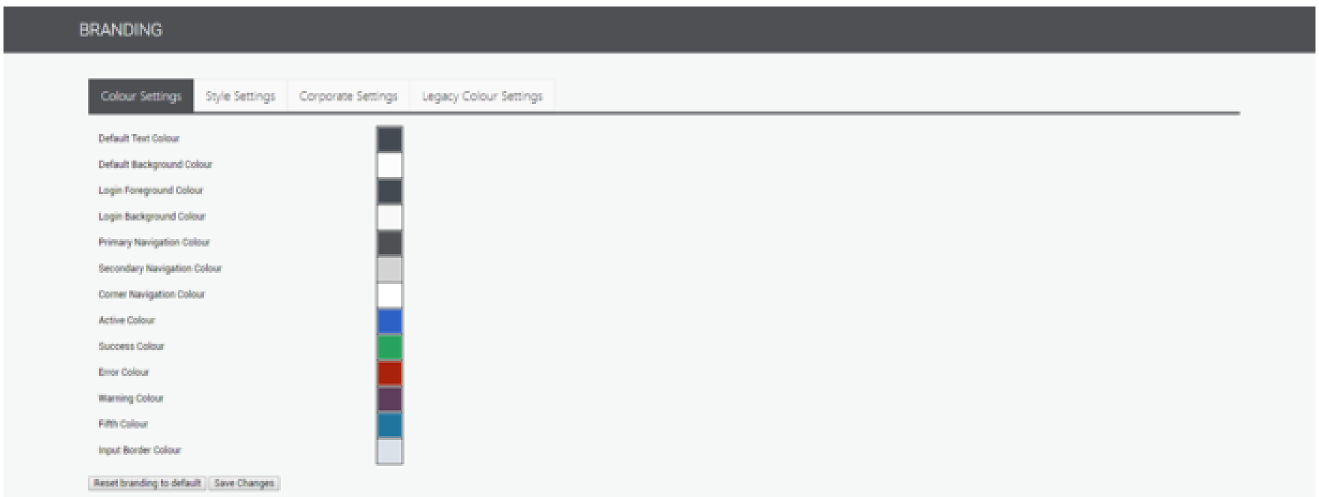
Branding Options

The branding settings allow customization of the look and feel of the application so that it closely aligns with company branding.

On the Branding page, four tabs enable you to define branding settings. The four tabs are as follows:

- Colour settings
- Style settings
- Corporate settings
- Legacy colour settings

Colour Settings



The following settings can be defined on the Colour Settings tab:

Default Text Colour	The standard colour used for most text throughout the application.
Default Background Colour	Changes the colour of some grids in the application.
Login Foreground Colour	Changes the colour of the text displayed on the login page.
Login Background Colour	Changes the colour of the login box.
Primary Navigation Colour	Changes the colour of the menu and page headers.
Secondary Navigation Colour	Changes the colour of the menu sub-items.

Corner Navigation Colour	Changes the colour of the logo section of the menu.
Active Colour	Changes the colour of the currently-selected item. It is also used for most buttons.
Success Colour	Changes the colour of messages that indicate success, and changes the colour of some Submit buttons.
Error Colour	Changes the colour of messages and highlights that indicate an error, and changes the colour of some buttons, such as Revert.
Warning Colour	Changes the colour of messages and highlights that indicate a warning.
Fifth Colour	Used when additional colours are required (I.e. on screens with many buttons or status indicators).
Input Border Colour	Changes the colour of border around any input box.

Style Settings

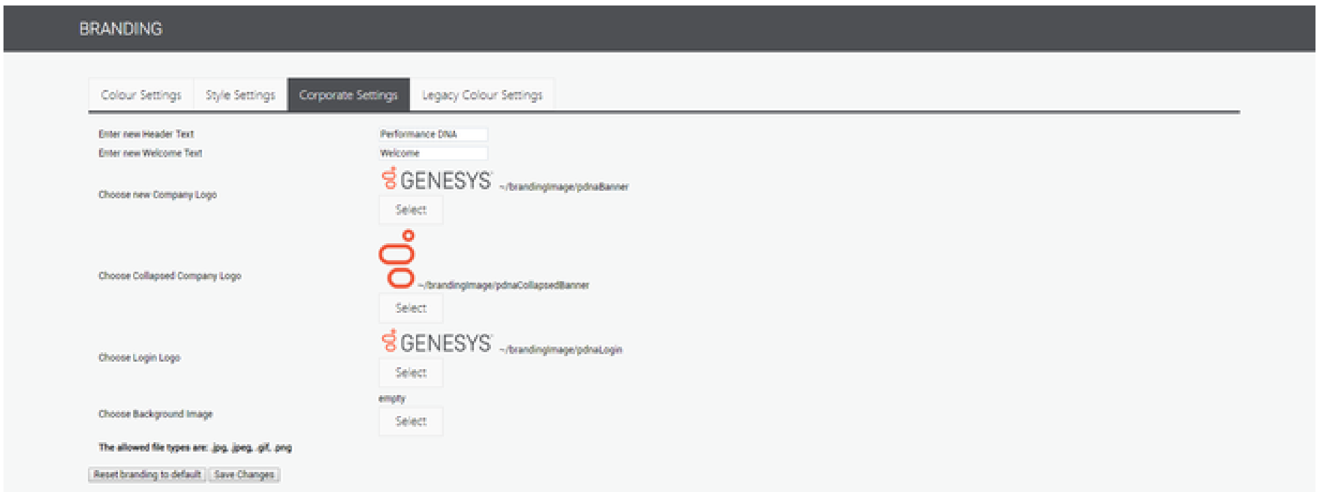
The following settings can be defined on the Style Settings tab.

Header Font Type	Sets the font for the headings within the application.
Body Font Type	Sets the font for any body within the application.
Change Font Size	Sets the size of the text within the application.
Border Style	Sets the thickness of any border within the application.
Corner Style	Sets the corner style of the boxes and buttons within the application.
Button/Heading Text	Sets the button/heading text within the application.

Important

The selected font must be available on client machines; otherwise, the font will default to one that is available.

Corporate Settings

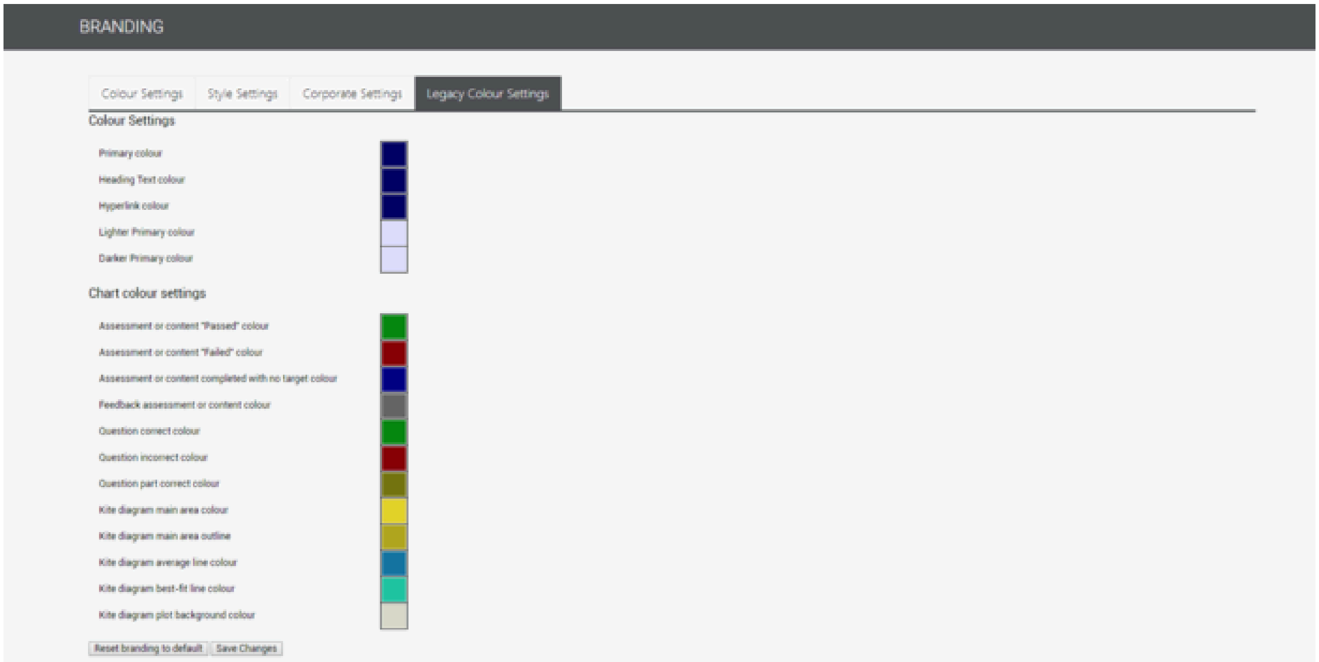


The Corporate Settings tab allows the user to specify company logos for the menu and Login screen. In addition, the user can select a background image to be displayed on the Login page.

The following settings can be defined on the Corporate Settings tab:

Enter new Header Text	Text displayed on the login page.
Enter new Welcome Text	Optional text.
Choose new Company Logo	The logo displayed when a menu is expanded.
Choose Collapsed Company Logo	The logo displayed when the menu is collapsed.
Choose Login Logo	The logo displayed on the Login screen.
Choose Background Image	The background image displayed on the Login page. Note: To produce a high-quality image, the resolution must be sufficient for full-screen display.

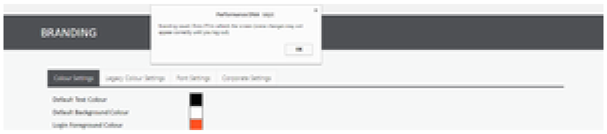
Legacy Colour Settings



The Legacy Colour Settings tab contains a small number of colour setting options, although these will be slowly discontinued as new versions of the product are released.

Setting Branding

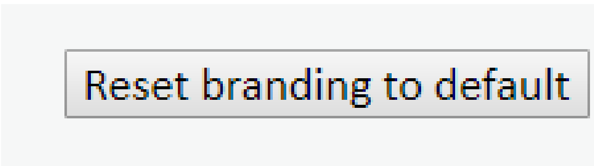
To set branding select the desired options and save before exiting each tab.



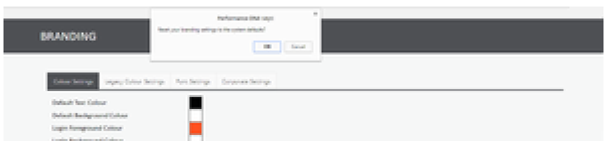
A dialog appears to indicate that the changes have been saved. A page refresh is sometimes required. For some changes the user needs to logout and log back in again.

Restore Branding to Defaults

Each tab contains a button for resetting branding.



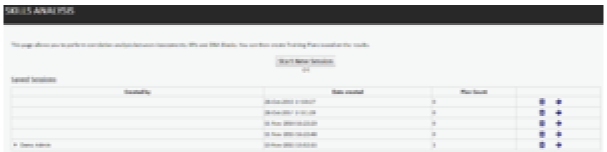
Clicking the Reset option will revert all branding back to the default branding that the product was installed with. **Note: This resets all branding across the entire application not just the branding of the tab the user is on.**



The user has a final option to cancel the action. Click OK to confirm the reset or cancel to abandon the action.

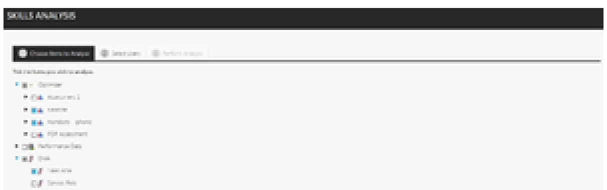
SkillsAnalysis

The SkillsAnalysis page enables you to correlate performance with learning interventions, and coorelate performance in one area against another. Sessions can be saved for future reference.



To begin a new Session, follow the following steps:

Choose items to Analyse.

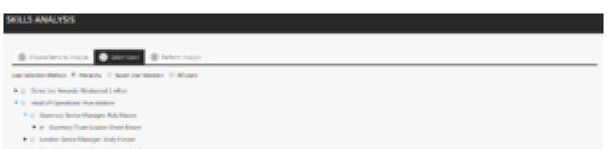


- Performance DNA – Assessment data
- Performance Data – DNA Bae Data / KPI
- DNA – DNA Strands or DNA Sequences

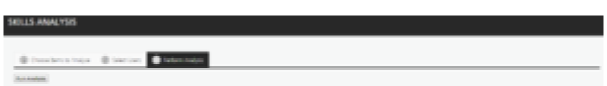
Select the items that you wish to correlate.

Select Users from the hierarchy. It is possible to select all users or specific users. In the following example a particular manager has been selected, which would select all members of this manager's team.

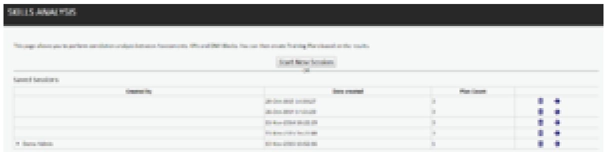
If all users are to be selected as part of the analysis, click **Select all users**.



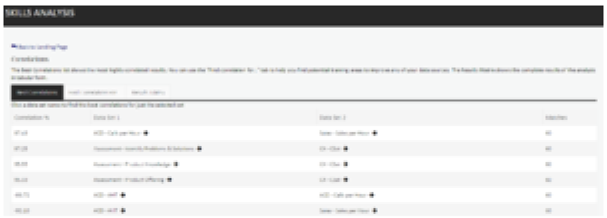
Perform Analysis, to perform the correlation analysis on the select data types for the selected user(s), click **Run Analysis**.



To view the **Analysis Results,** click the arrow at the end of the session details.

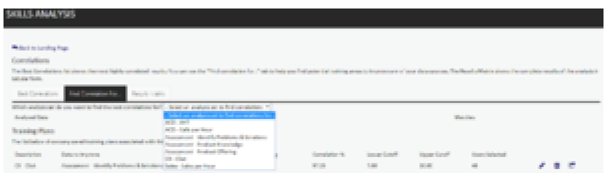


Three options are available for viewing the correlation results on the **Correlations** page. The following example shows the **Best Correlations** option**.** The higher the correlation, the stronger the influence on the output.

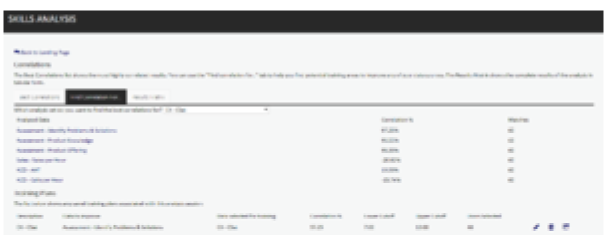


The **Find Correlation For...** option allows a specific data set to be selected to view the correlation results.

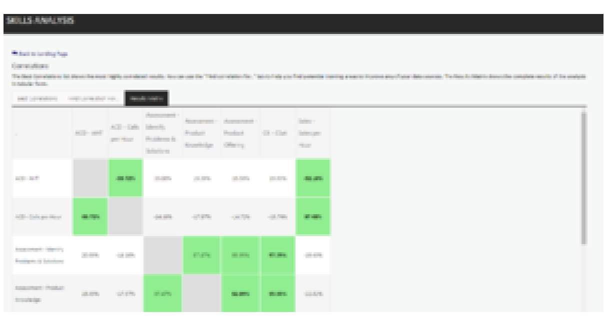
Use the drop down box to select a specific data set to view.



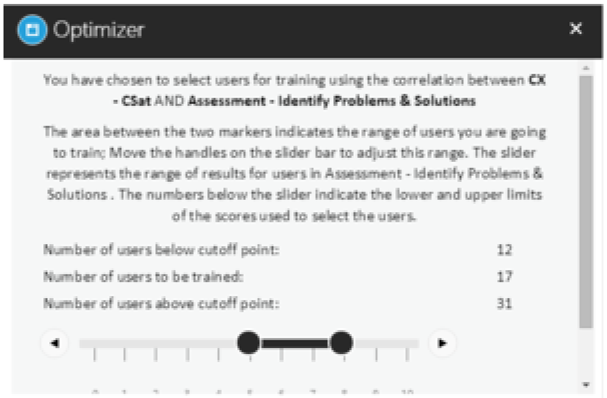
In the following example Customer Satisfaction (CSat) has been selected with all correlation results:



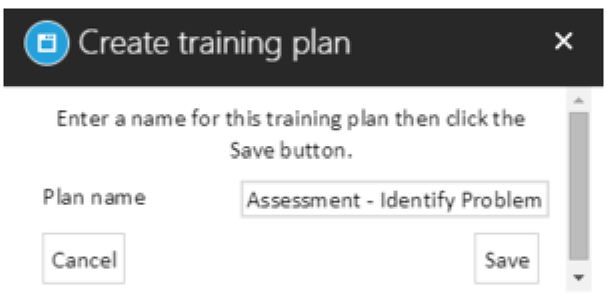
The third option, shown below, is to view the **Results Matrix** as a heat map view, with the highest (strongest) correlation results highlighted in green.



To select users for training based on the correlation results, click the analyzed data. A separate window is presented to select the number of users based on results.



Once the users have been selected click **Save** to save that training plan and give the new plan a name (if required), then click **Save**. The saved training plan will then be available to view or export the details out by selecting **Manage Saved Sessions**. This will then reveal the user names that have been selected against the training plan.



Personal Development Review

The PDR feature allows employees to define a set of personal development objectives and agree to them with a manager. Once objectives have been approved, employees can submit files to demonstrate that the objectives have been completed. Managers can also create, delete, approve and complete objectives (i.e. set the statuses to ‘completed’). Managers can then combine the results of the PDR Potential Assessment and the achieved objective targets to give the employee a score on the talent matrix.

There are three pages of PDR features: **PDR**, **PDR Dashboard** and **PDR Admin**. The PDR and PDR Dashboard pages are in the User section of the menu. The PDR Admin page is in the Admin section of the navigation menu.

These pages will not automatically be assigned to user roles, so it is recommended that the Manager role is granted access to the PDR Dashboard page and the User role is granted access to the PDR page. Administrators and/or managers should be granted access to the PDR Admin page in order to support the management of review periods.

The PDR page is primarily for employees to define their development objectives, whilst the dashboard allows managers to create, edit, approve and monitor the status of their reports’ PDRs.

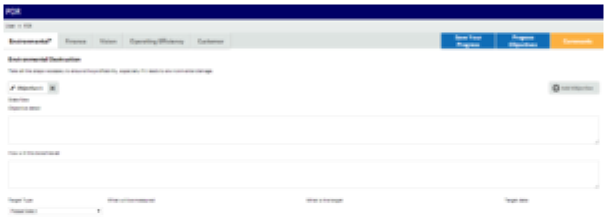
Setting the number of objective targets for users

The number of targets that appear in users' PDR pages is one by default for all users, however, this can be modified on a per-user basis. Follow the steps below if you wish to change the number of targets (per objective) users will see in their PDR page:

1. Login as a system administrator
2. Select the System Settings page
3. Create a new user field to store the value for the number of PDR targets
4. Select the general settings tab
5. Set the user field for PDR target counts to the new PDR user field
6. Populate the user field for users either by importing a spreadsheet of users that includes a value for the PDR field or by editing existing users in the **Users & Hierarchy** widget and setting a value for their PDR target counts field

PDR Page

The PDR widget is divided into 5 tabs by default: **Environmental**, **Finance**, **Vision**, **Operating Efficiency** and **Customer**. It is possible to define multiple objectives within each of these tabs. Select one of the tabs and click the **Add Objective** button to create a new objective. The new objective will appear as ‘Objective 1’, followed by **Objective Detail** and **How will this be achieved** fields. The target can then be set by selecting either **Goal** or **Measured** from the **Target type** field.



The **Goal** objective type will require the user to enter content in the **What will be measured**, **What is the target** and **Target date** fields.

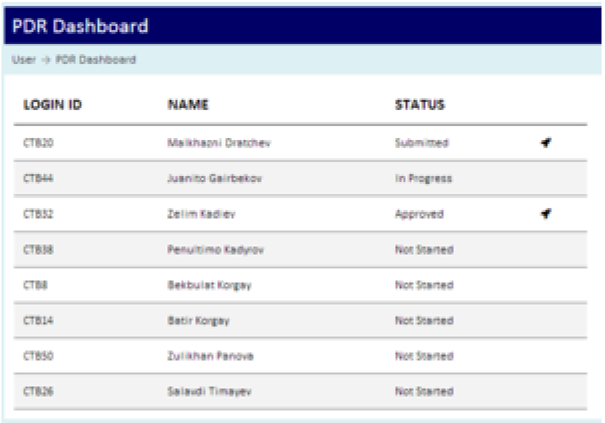
The **Measured** objective type includes the same options, except that the **What will be measured** element allows for the selection of a KPI/DNA Base Data rather than free text.

The **Save your progress** button will become enabled once there are unsaved changes in the PDR, and allows the user to save the current state of their PDR. Clicking the **Propose Objectives** button will update the state of the new objectives to ‘pending approval’. They will then become visible to the user’s manager. The manager can then make changes to the objectives, delete them and approve them.

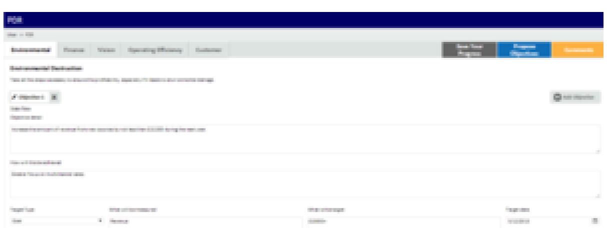
It is possible to continue adding and proposing new objectives after the initial set have been proposed to the manager. The manager will then have to review the new objectives and decide whether to delete, modify and/or approve them.

PDR Dashboard Page

Managers can view the status of their reports' PDRs, as well as edit and approve PDR objectives submitted by their reports via the **PDR Dashboard** widget.



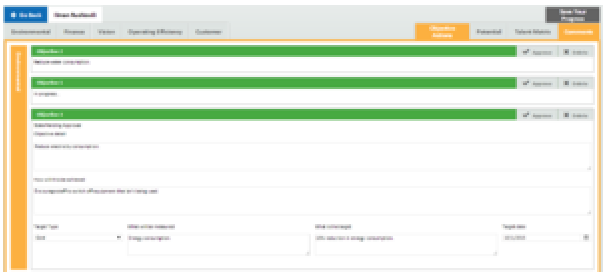
Selecting the **PDR Dashboard** widget from the navigation menu will display the logged-in manager's list of direct reports, including their Login IDs, names and PDR statuses. The status column will contain either: **Not started**, **In Progress** (there are objectives that have yet to be submitted to the manager for approval), **Submitted for Approval** (available for review and approval by the manager) or **Approved** (all objectives have been approved/deleted by the manager). Submitted objectives can be edited by the manager prior to approval. Once the employee submits an objective, they can no longer make changes to the objective detail, how will this be achieved, or target type sections. Similarly, the manager will be able to make changes to submitted objectives up until they are approved.



Once an objective has been approved both the agent and the manager will be able to add comments and evidence file uploads to the objective.

Objective Actions Screen

The objective actions screen lists all objectives with labels on the left side indicating each objective's PDR section (for example Environmental, Finance etc.). Click the title of the Objective to expanded to show further detail. Objectives that are pending approval can be approved or deleted via the tick and cross icons on the right. Objective details can also be edited for objectives that are pending approval by making changes to the relevant elements and clicking the **Save Your Progress** button.



Tasks that have been approved can also be set to **Complete** status in this screen by selecting the appropriate Target rating (based on which target level the employee achieved) and clicking the Complete checkbox. Once an objective has been set to complete it can be moved back to approved status by unchecking the **Complete** checkbox.

PDR Admin Page

This section describes how to use the PDR Admin page.

PDR Potential Assessment

The PDR Admin page allows for the setting of the **PDR Potential Assessment** that will be assigned to employees as part of the PDR process. The information gained from completed PDR assessments will then be used as an input into the talent matrix feature. To select an assessment, select an assessment from the PDR Potential Assessment dropdown and click the Save icon.

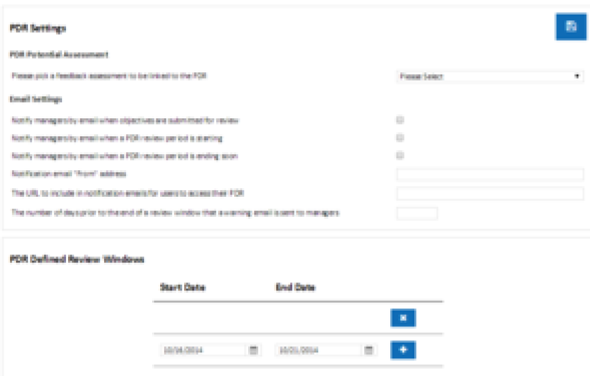
Note: Only assessments that are set to feedback only with a deployment type of **self only** will be available in the dropdown.

PDR Defined Review Windows

PDR administrators are also able to define review windows. These are pairs of dates that can be used to define the date ranges during which PDR reviews may occur. It is only possible to save Talent Matrix snapshots during a review window.

PDR Email Notifications

The PDR functionality includes the option for email notifications for managers when certain events occur. These options are available from the PDR Admin page.



It is possible to enable email notifications for managers when the following events occur:

- A manager’s reports submits objectives for review
- A PDR review period is starting
- A PDR review period is ending

Additionally, this page allows the user to set the ‘from’ address for all email notifications, a URL to include with the notifications, and the number of days prior to the end of a review window that the notification should be sent.

Feature Notes

This section describes important feature-specific notes.

PDR Dashboard Widget

- Managers will only be able to see the PDRs of users who are directly below them in the hierarchy.
- Any objectives that are created by the manager will initially have their state set to ‘pending approval’, rather than new.
- Objectives that are new will not be visible to the manager until they have been submitted by the user.
- Deleted objectives are hidden from both the employee and their manager.

The PDR Potential Assessment will be available to managers when viewing their reports’ PDRs. The assessment should **not** be manually assigned to Performance DNA users.

Appendix 1: Optional Components

Performance DNA includes several additional components that provide the ability to:

- Automatically import DNA KPI data via the **DNA Import Service.**
- Allow administrators to create LMS learning items and assign them to users via the **LMS Learning Item Integration** functionality.

  Please refer to the corresponding install/upgrade guides for installation instructions for each of these components.

DNA Import Service

Automatic import of new KPI spreadsheets by copying them into the folder of your choice can be enabled with the DNA Import **Service**. The setup of this service requires the definition of a KPI import folder (e.g. “C:\KPI_Imports”) and an archive folder (e.g. “C:\KPI_Archive”). Copying a KPI spreadsheet into the import folder will enable the service to automatically import the data into Performance DNA and then move the file into the archive folder. The file will be renamed prior to being moved to the archive folder in order to prevent naming conflicts. This removes the need to import KPI data manually through the Performance DNA **Manage KPI** page.

Note: This service is **not** currently supported within an Active Directory (Secure Token Service) based environment.

LMS Learning Item Integration

The LMS learning item integration feature allows Performance DNA administrators to assign Performance DNA assessments to LMS users (JZero and Scaffold LMS are currently supported). These assessments can then be viewed and launched from the LMS.

To create an LMS learning item:

1. Click the **Learning Items** page
2. Click the **Create Learning Item** link
3. Select **LMS Course** from the **Type** select box.
4. An LMS hierarchy containing the courses will then appear and allow a course to be selected.
5. Click **Save** to complete the creation of the learning item.

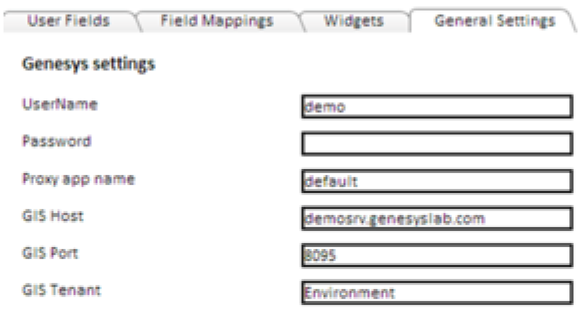
LMS learning items can be assigned to users and DNA Strands in the same way as other learning item types.

Note: LMS course learning items can only be assigned to LMS users who are mapped to a valid LMS user (via the user field defined for the LMS integration feature).

Configuring GIS Authentication

In Performance DNA, open the **System Settings** page and select the **General Settings** tab. Here, you'll see the settings you need to configure GIS integration.

Note that these options are not visible until you've made the database change mentioned previously.



The GIS tenant will vary depending on your installation, but for a single tenant GIS it should be Environment.

Typically the proxy app name can be left as default.

The user name and password provided here are only used for the Skills Route part of the application. If Performance DNA is configured to use GIS as an authentication source, the username and password of the user who is logging in is used instead of these values.

The GIS host and GIS port can be found by launching the status page from the Genesys server, and checking the URL – the port will be shown as a number after a colon following the host name. The Status Page should be accessible in the Start menu in **Genesys Solutions** > **Genesys Integration Server** > **SOAP** > **Status Page** (or OS equivalent).

In the example, the host is **demosrv.genesyslab.com** and the port is **8095**.

Save the changes once you've completed all the fields.

The "Update Routing Skills" page in the Administration > DNA menu should now work as per the documentation.