Performance DNA Agent User Guide

Performance DNA 9.0

1/17/2022

Table of Contents

Performance DNA Agent User Guide

This guide describes how agents use Performance DNA.

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 on the **Log In** button.

> ### Important
> Depending on the configuration of the installation, login details may not need to be entered in order to access Performance DNA (e.g. If Active Directory authentication has been enabled). Your trainer will guide you on the login rules for your organization.

The My Development screen will be displayed, containing any assessments and learning items that have been assigned. This screen contains any assessments and learning items that have been assigned. Learning items may include useful website links, text, knowledge nudges or other assessments developed by trainers or managers.

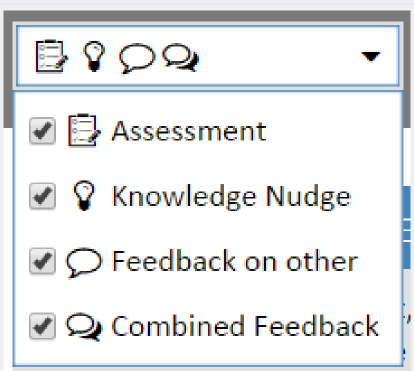
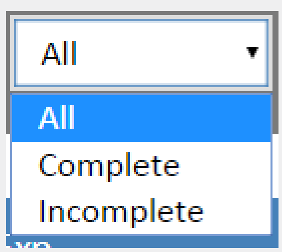
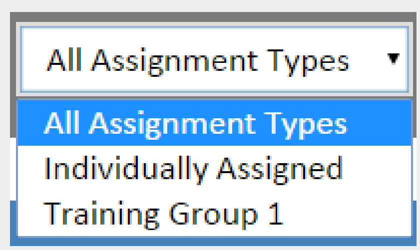
If any of the assessments have been given a completion date, the date will be listed in the "Date By" column.

Taking an Assessment

Any assessments that have been assigned will be visible under My Development page.

Active Assessments are presented at the top of the list. Under each Assessment a snippet of any introduction text is also displayed enabling the user to quickly see key information regarding the Assessment.

The list can be filtered using the three drop down menus at the top of the page.

Assessment Style	Assessment Status	Assessment type
		

Assessment Style

The following describes each assessment style:

- Assessment – Standard Assessments are typically used as a knowledge check to assess the users understanding of a specific subject.

- Knowledge Nudge – This is a piece of learning that has been assigned to the user. This can be in the form of an e-learning course, document, or a referral to a website or knowledge base.
- Feedback on others – This is used when requesting feed back on peers and is typically used for 360º feedback reviews.
- Combined Feedback – this is typically used for employee review periods / 1-2-1's and requires both the Agent and Manager scores, which form the basis for the review conversation. Once the scores have been agreed and signed by both parties the final ratings are recorded.

Assessment Types

The following describes each assessment type:

- Individually Assigned – these are Assessments that have been directly assigned to the user.
- Group Assigned – these Assessments have been automatically assigned based on the user being part of a Group. Groups are used to filter users for reporting and Assessment purposes. For example, new recruits could be added to the Induction Group, in doing this all of the induction specific Assessments are automatically assigned to the users.

When assigning Assessments specific date ranges or completion dates can be applied to the Assessment. Assessments with dates applied will be displayed with a calendar icon and the completion date. If the current date is within the Assessment date range then the Assessment will be listed as part of the active Assessments, if the current date is before the date range the Assessment will be listed with the completed / inactive Assessments.

The below example shows the Baseline Assessment that have been assigned with a date range that is in the future.

Once started an Assessment will display a completion icon and the percentage completed so far. The below example shows that the Customer Service Excellence MC Assessment is 67% complete.

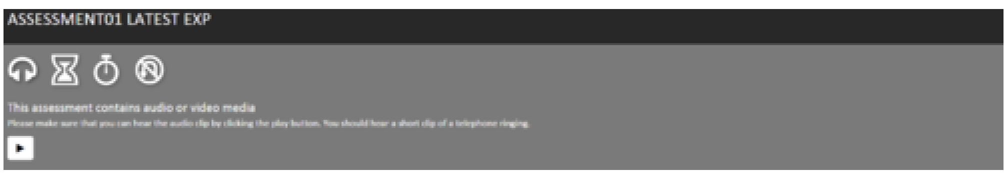
To start taking an assessment, click the name or launch icon: .

This will display a screen similar to the one below.

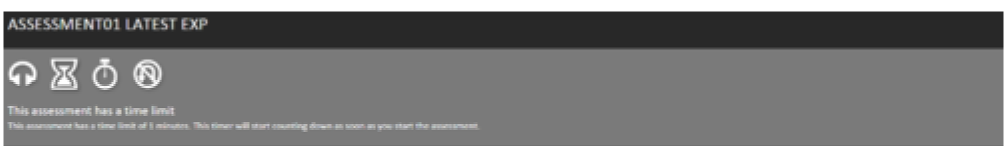
File:PDNA AU LaunchAssessment.png

Based on the content of the Assessment a number of informational icons may be displayed under the Assessment name. When clicked on the icon will reveal additional information around playing media, timed Assessments, question timing and navigation.

Below is an example of the information available when the Assessment contain audio or video clips.



The following examples are displayed when either the Assessment or Individual questions are being timed.



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The final example is displayed when an Assessment can only be taken in the order that it was created and any skipped questions can’t be revisited.

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If a Knowledge Nudge has been assigned to the Assessment, the following will be displayed.

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A Knowledge Nudge can be either a document, website or e-learning that the user must read, visit or watch before taking the Assessment. The following Assessment could be a series of questions to test the users understanding of the Knowledge Nudge content or simple Feedback form.

It is important to remember that the Assessment can't be started until the Knowledge Nudge has been opened and closed.

Once ready to take the Assessment click on the Start button to begin.

When the Assessment has been completed it will be move to the bottom of the users My Development page and will display both the finished icon and the percentage score.

Question Examples

There are different types of assessments and questions. If the Navigator appears on the top of the window, you can click a question number jump to a specific question or the Prev(ious) and Next buttons to move back and forward through the Assessment.

If the assessment is timed, the time remaining will be displayed between the navigation bar and the Question.

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Follow the instructions for each of the questions, and after selecting the answer, click Next to move to the next question. After each question has been completed, the Navigator will be updated (if available) to indicate which questions have been completed.

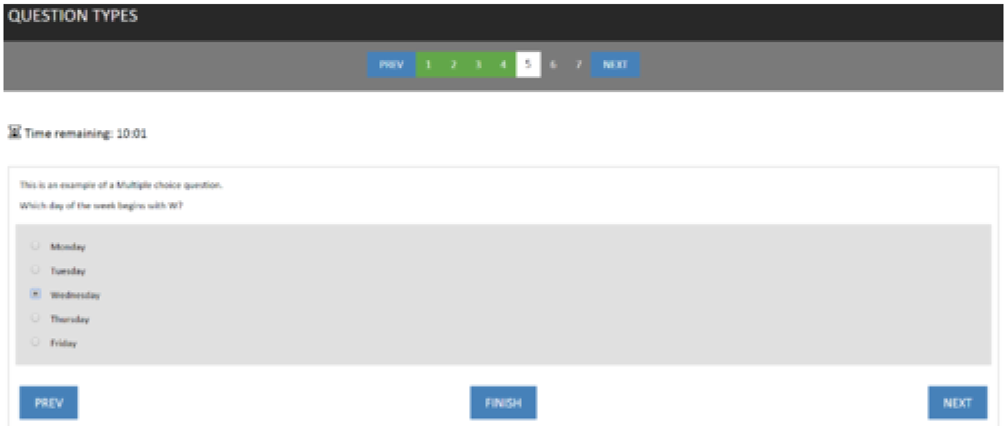
There are six different question types that can be used during an Assessment:

- Multiple Choice – pick one correct answer from the list.
- Pick Correct – pick multiple correct answers from the list.
- Hot Spot – mark the answer on an image with a 'pin.'
- Text – answer using a simple word or phrase.
- Numeric – answer using a numeric value.
- Feedback – provided a rating between x and y.

Each question may also contain additional content such as:

- A link to a website
- An image
- A video clip

Multiple Choice



A Multiple Choice question may contain multiple answer but only 1 can be selected as your answer.

Pick Correct

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With Pick Correct question you have the ability to select multiple answers, as you can see from the example above.

Not all questions will specifically ask for X correct answers so it is important to remember when the answers use a ‘check box’ ⯑ you are able to select more than one answer. If the answers are marked with a radio button ⯑ then the question is a Multiple Choice and only 1 answer can be selected.

Hot Spot

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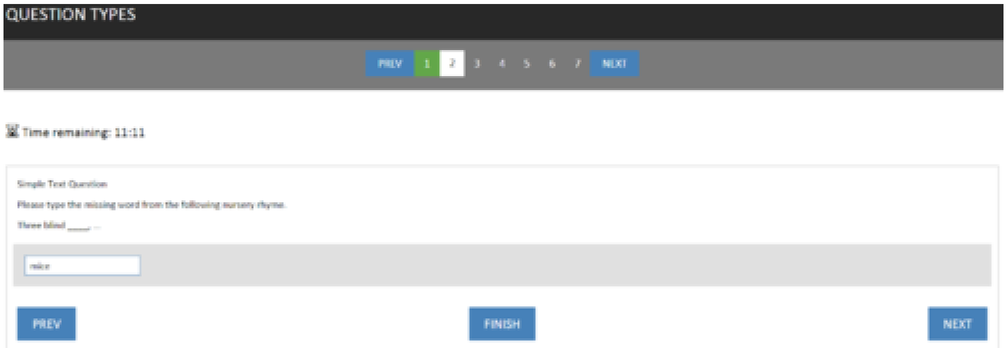
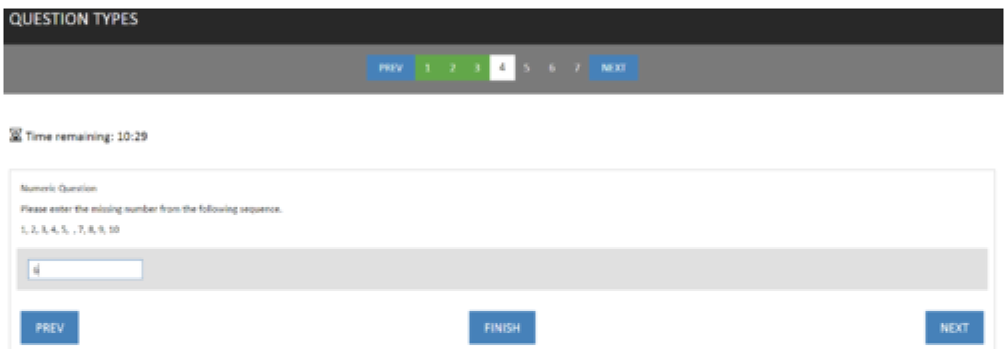
Hot Spot questions test you understanding by asking you to identify a specific item ion a picture. This could be along the lines of ‘Please identify the power button on our new product.’ In the example above the question is just for fun and you must guess where the treasure has been buried.

Text



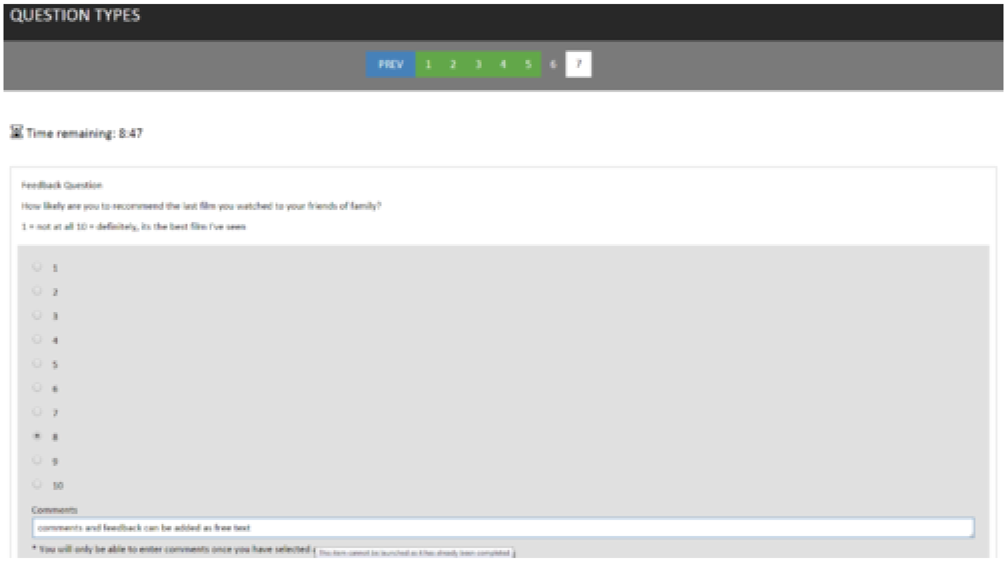
Text questions require you to provide either a single work or simple phrase to assess whether you know the correct term, name or phrase.

Numeric



Numeric questions are similar to Text questions only the answer is a number. This might be used to assess whether you know the price of a new product or the maximum fine if there has been a breach of regulations.

Feedback



Feedback questions are not designed to assess your knowledge but to gather feedback in the form of a rating. The most common feedback question that you are likely to have seen is ‘Out of 10, where 1 is not very likely and 10 is extremely likely, how likely are you to recommend out services to a friend?’

In a work environment you may see questions along the lines of:

- How would you rate this Assessment / the Training course content.
- How would you rate your performance this month?
- Do you feel that you are fully supported by the management team to carry out your role?

Feedback questions can have any scale and in some cases the scale might be replaced with phrases rather than numbers.

Media with questions

As mentioned previously questions can have URLs, Images and Videos attached. The below demonstrates how each of these are displayed within the Assessment question.

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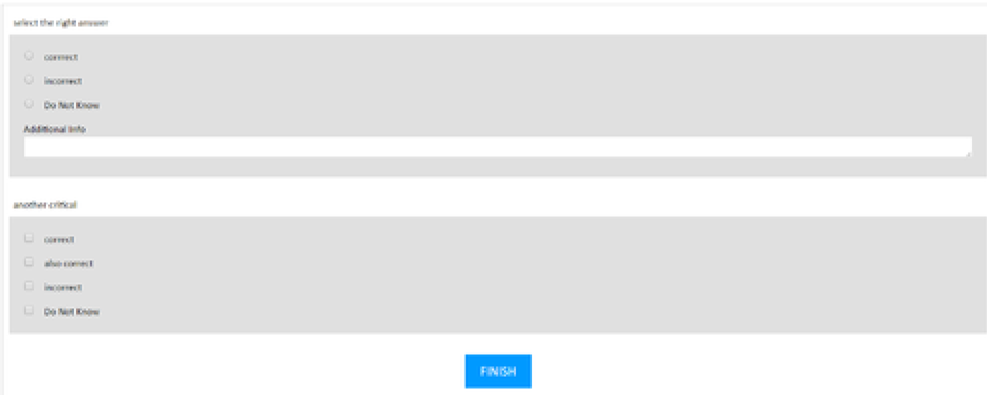
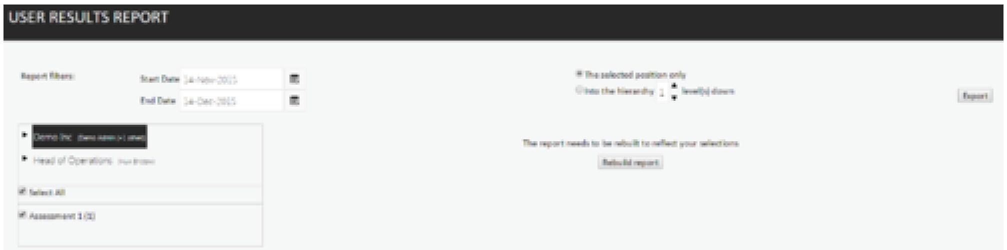
Additional Info



If a question asks for additional info a text box will appear for you to enter any reasoning for your answer or for any information regarding the answer or question that you may have.

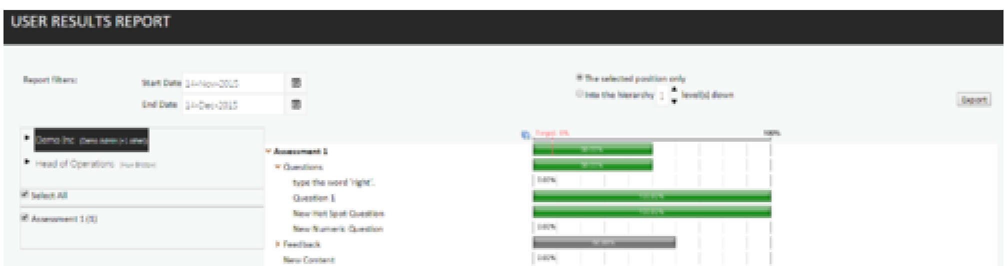
Viewing Results

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.



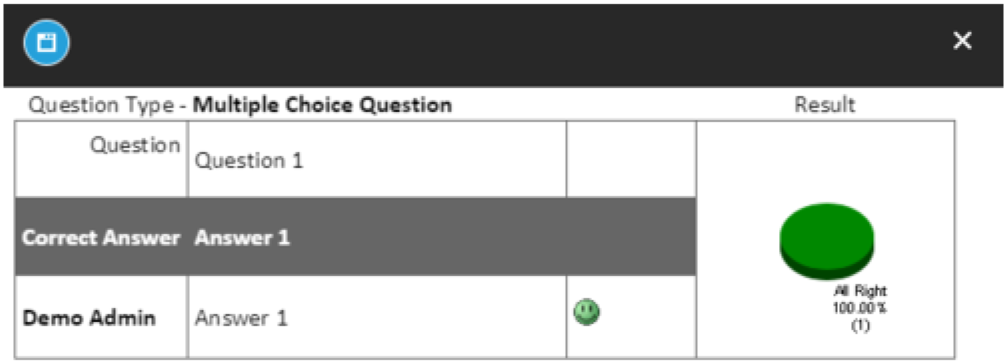
- Select required date range.
- From the hierarchy view select the hierarchy level or individual.
- Select the assessments from the bottom left hand window. These are all of the assessments that the individual has completed.
- Click on **Rebuild report** to view the results.

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

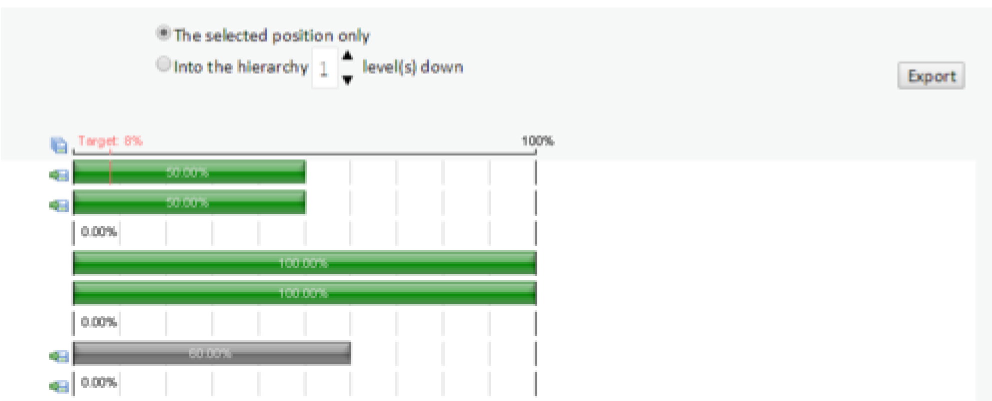


Right-click on a question to **View Detail** about a question.

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.

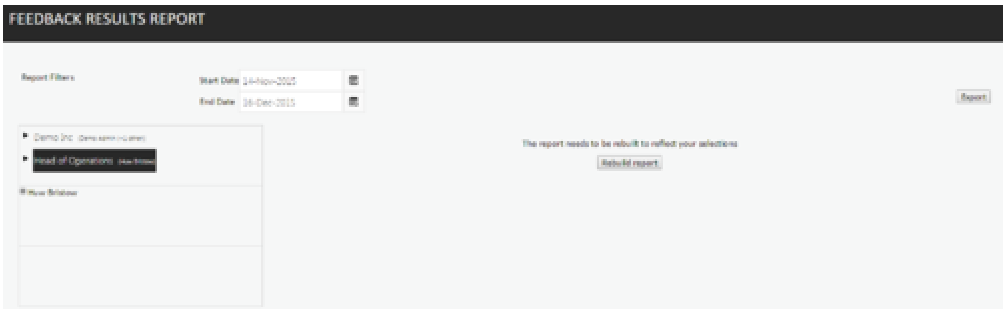


Click the disk icon to select the level of data that you want to export. After selecting your required level of data aggregation click the **Export** button to download the data as a CSV file.

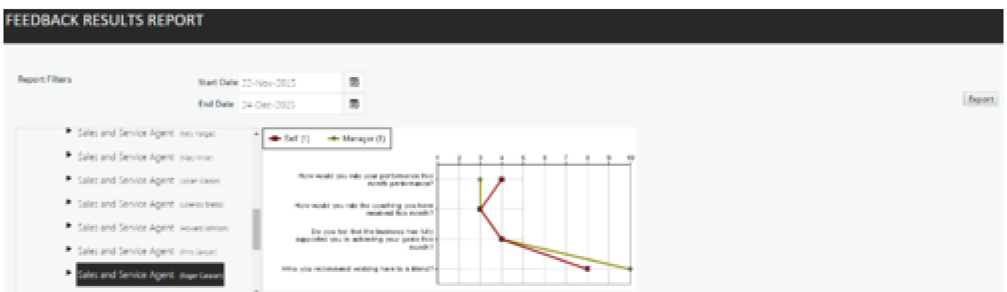
Viewing Feedback Results

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.



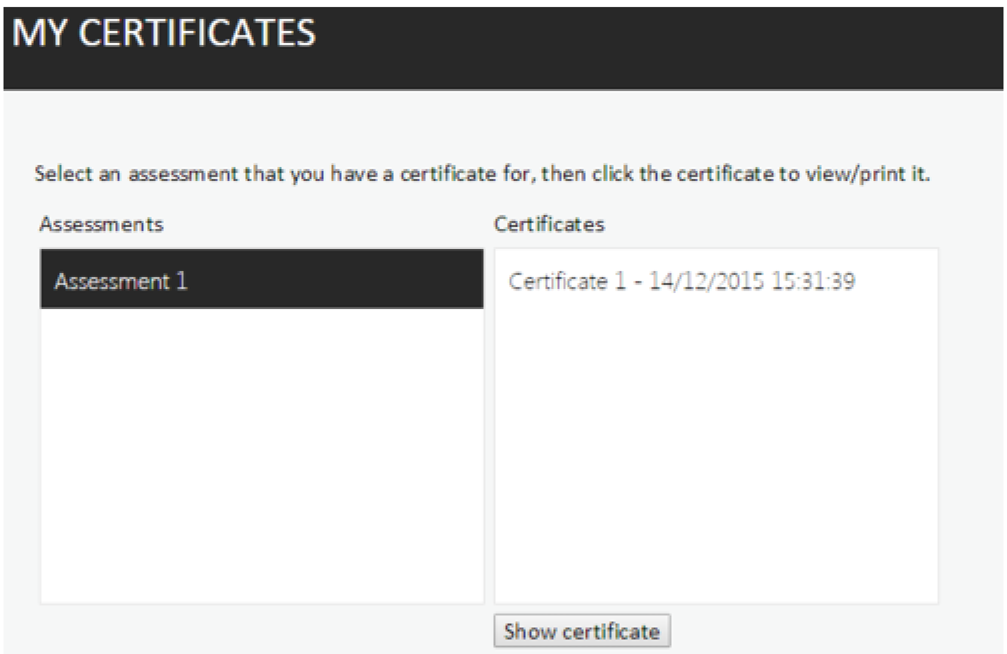
The information is also available for exporting to an Excel spreadsheet by selecting **Export**. The Excel spreadsheet will contain the criteria used in the assessment.

Certificates

If a user has achieved the required pass mark, the certficate 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 on an assessment name and all of the associated certificates will be displayed along with the date and time they were awarded.

Click on the certificate to open and prepare it for printing.



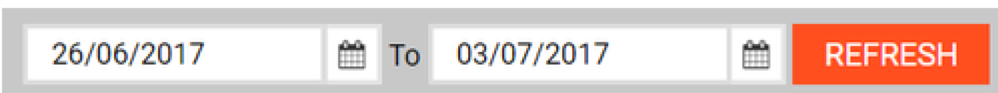
DNA

DNA is where key business data, for example, quality monitoring, sales and revenue, customer satisfaction etc., has been used in creating a job role profile and the data is weighted in order of importance to the business.

This allows visibility of where there is a potential training requirement or where performance has exceeded expectation.

There may also be the opportunity for self-learning by assigning learning items to enhance performance based on the results achieved. As a manager you will have visibility of these performance results for your team and be able to assign learning items if required to individual team members.

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



The data is shown for the selected date range, which defaults to the last week.

The performance data is displayed as a series of partition charts with the user's assigned **Strands** at the top level.

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

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

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

Personal Development Review

The PDR page allows you to manage your Personal Development Review (PDR), including creating objectives, adding objective comments and uploading evidence files for objectives.

The PDR page is accessible from the User section of the navigation menu. This page will be divided into multiple tabs with different labels depending on how your company has set up the PDR process. Each tab includes a description of the PDR section and includes a button to add a new objective.

To create a new objective, navigate to the PDR page and select one of the tabs at the top of the page then click the Add Objective button. Next, specify the objective name (optional), objective detail, how will this be achieved, and the target type (either goal or measure).

Goal targets require that you specify entries in the following fields:

- What will be measured
- What is the target
- Target date

If you create a measured target, the following fields will be required:

- DNA/KPI (via the ‘What will be measured’ drop-down box)
- What is the target (this must be a numeric value)
- Target date

You may be required to provide multiple targets for the objective, e.g. target, stretch and super-stretch, depending on how your company have defined the PDR process.

Once you’ve entered the required information, click the Save Your Progress button to save the new objective. To delete a saved objective, navigate to the tab that includes the objective, then click the ‘X’ icon next to the objective name at the top of the page.

> **Important**
> Once you’ve proposed an objective/objectives to your manager, you will no longer be able to delete them. Your manager will be able to delete or approve them.

Once you’re happy with your objectives, click the Propose Objectives button. This will change the state of all new objectives to ‘pending approval’. They will then become visible to your manager who will review them and either approve or delete them.

If the manager approves your objectives, they will become visible again in the PDR page and you will be able to add comments and upload evidence file to prove that you have completed the objective. These two options will appear at the bottom of the objective display in the PDR page.

The Comments tab at the top-right of the page also allows you to submit a comment to your manager regarding your PDR.

You can always return to the PDR page to add more objectives. Each time you add and submit objectives to your PDR, your manager will review the objectives and decide whether to edit and approve or delete them. Your manager will also have access to the PDR comments and file uploads and will be able to review the target level achieved for each PDR objective.

PDR Evidence

On the PDR Dashboard, once an objective has been approved, the employee and manager can then upload evidence:

1. Click "Choose File" at the bottom of the page to first select the file and add a description,
2. Click "+" next to the description box and the file will begin uploading.

Files already uploaded, if any, will be displayed below the upload file area.

When the objective is complete, it is no longer possible to submit evidence. However, the objective can have its competed status reversed such that it is no longer complete, and evidence can then be uploaded again.

Logging Out

To log out ensure that you have no open assessments and click the click **Logout** link as shown below.

Collapsed Menu:

File:PDNA AU LogOut Collapsed.png

Expanded Menu:

File:PDNA AU LogOut Expanded.png