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Performance DNA Administrator Guide

Creating Templates Associated to Roles

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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.

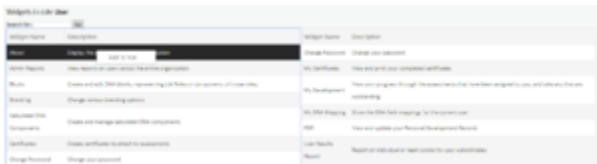
Once you have identified which pages are required to be accessed for which role, they can then be associated to that role.

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.

