Performance DNA Manager Guide

Performance DNA 9.0

1/2/2022

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Performance DNA Manager Guide

This guide provides a detailed description of how a manager uses Skills Management Performance DNA Manager v9.0.0.0.

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.

Important

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.

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.

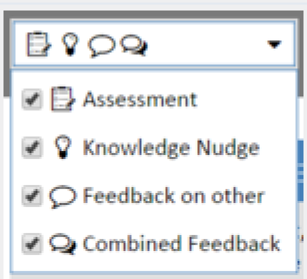
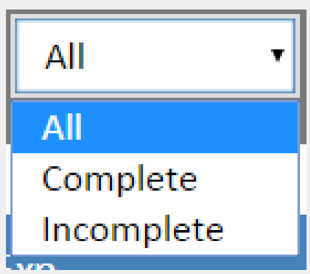
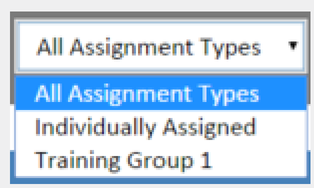
If any of the assessments have been given a completion date, the date will be listed in the "Date By" column.

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 3 drop down menus at the top of the page.

Assessment Style	Assessment Status	Assessment Type
		

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, referral to a web site or knowledge base.
- Feedback on others – This is used when requesting feedback on peers and is typically used for 360º feedback reviews.
- Combine 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

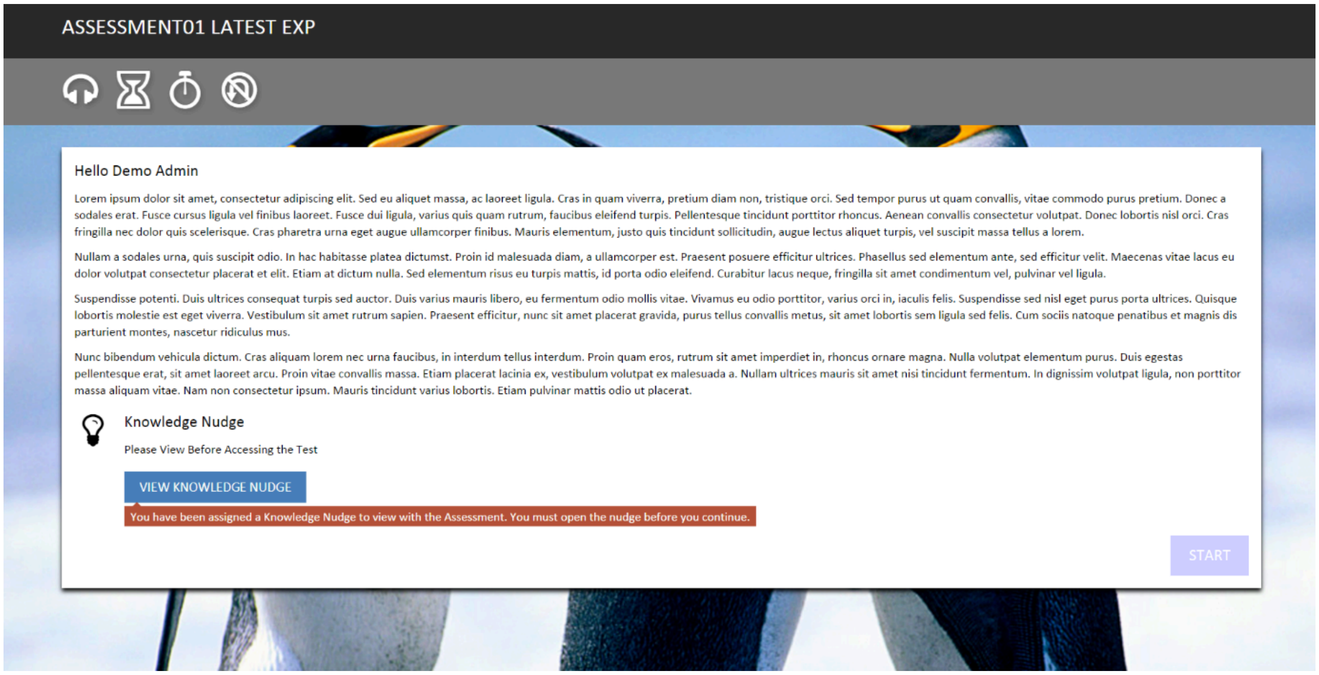
- Individually Assigned – these are Assessments that have been directly assigned to the user.
- Group Assigned – these Assessments have been automatically assigned based on the user being part of a Group. Groups are used to filter users for reporting and Assessment purposes. For example, if new recruits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

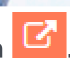
When assigning Assessments specific date ranges or completion dates can be applied to the Assessment. Assessments with dates applied will be displayed with a calendar icon and the completion date. If the current date is within the Assessment date range then the Assessment will be listed as part of the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

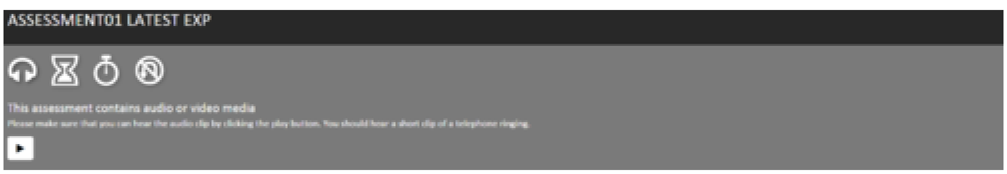
This will display a screen similar to the one below.



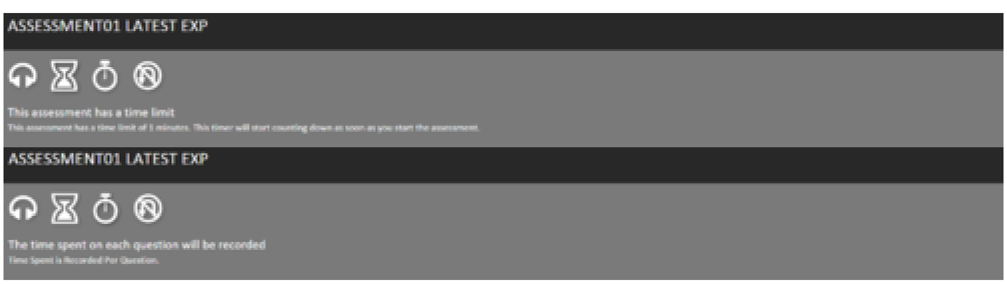
To start taking an assessment, click the name or launch icon .

Based on the content of the Assessment, many 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.

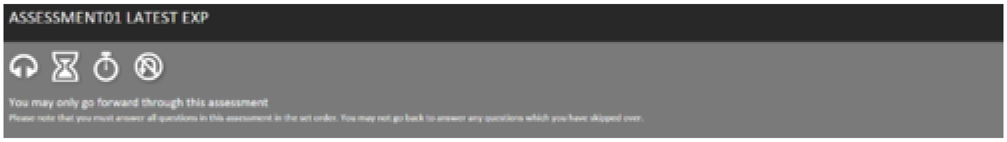
Below is an example of the information available when the Assessment contain audio or video clips.



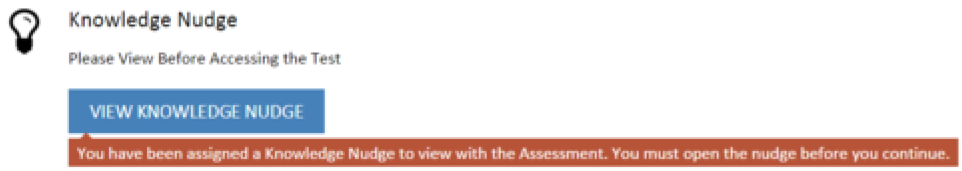
The following examples are displayed when either the Assessment or Individual questions are being timed.



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.



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



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 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.

Types of Assessments

There are three types of assessments:

Timed – This type of assessment must be completed in one session, and a clock in the top-left corner of the window will indicate the time available to complete the assessment.

Not Timed – This type of assessment can be accessed more than once, allowing completion at any time before the completion date.

Feedback – For this type of assessment, individuals rate themselves against specific criteria.

Feedback assessments can be set to different deployment modes which control who the assessment is assigned to, for example **self only** or **self and manager**. If an assessment is set to the **self and manager** deployment mode, both users will be required to complete a combined feedback assessment together and for this assessment to be signed (via user password) before it is recorded in the system. If a **self and manager** assessment has been set to only require user feedback before a combined test, the manager will have the option to initiate a combined feedback test without having previously completed their individual feedback assessment.

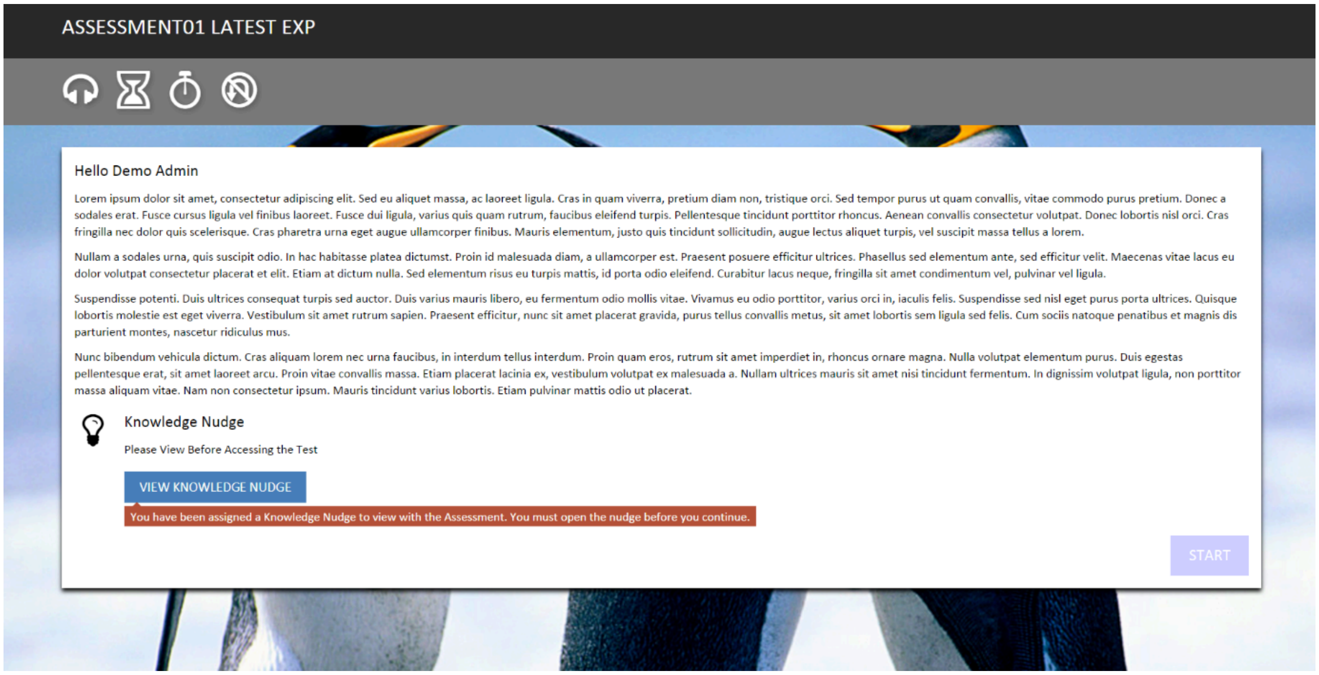
Timed and Untimed Assessments

To start taking an assessment, click the name, as shown below. If the assessment is timed, the time allowed will be displayed in the top-left corner of the window.

This will display a screen similar to the one shown in the following image.

At the bottom of the screen is an option to check that any audio can be heard. Click the **Play** button to check this.

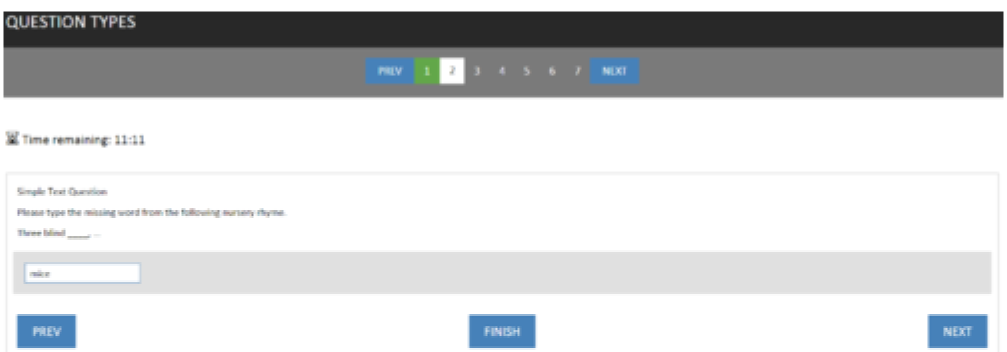
When you are ready to take the assessment, click **Start**. To close the assessment and take it later, click **Close**.



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 Previous 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.



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.

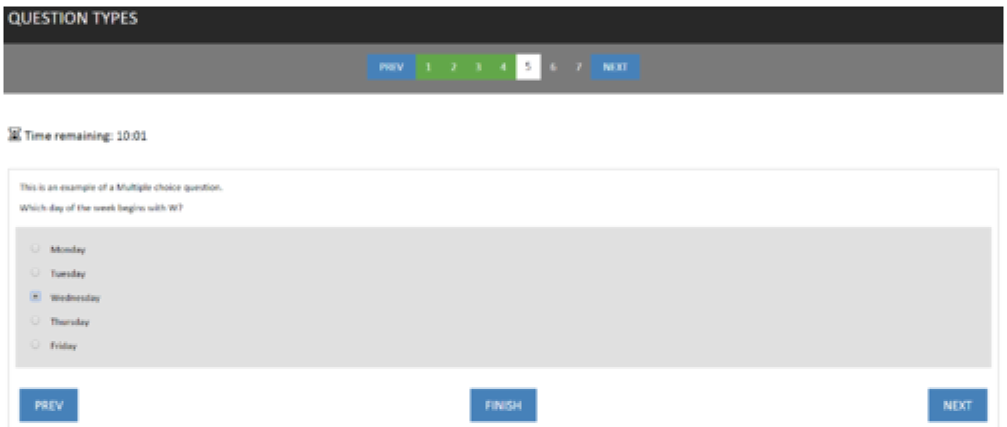
There are 6 different question types that can be used during an Assessment:

- Multiple Choice – pick 1 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:

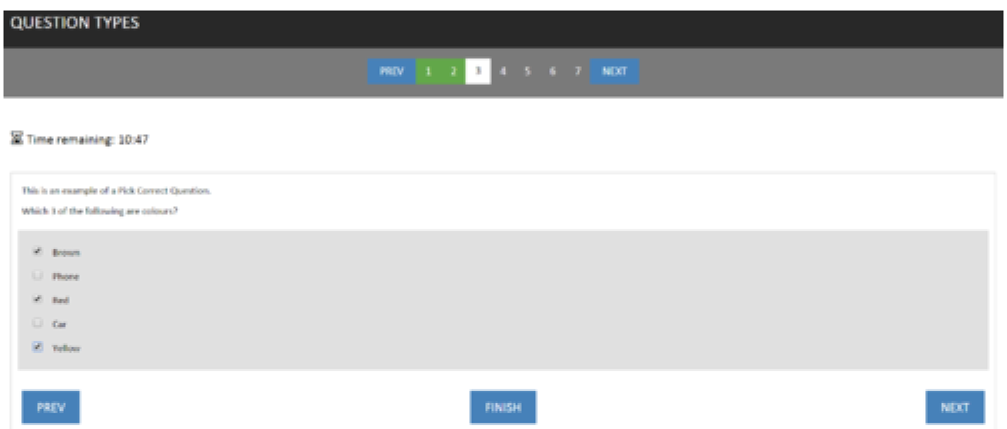
- A link to a website
- An image
- A video clip

Multiple Choice



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

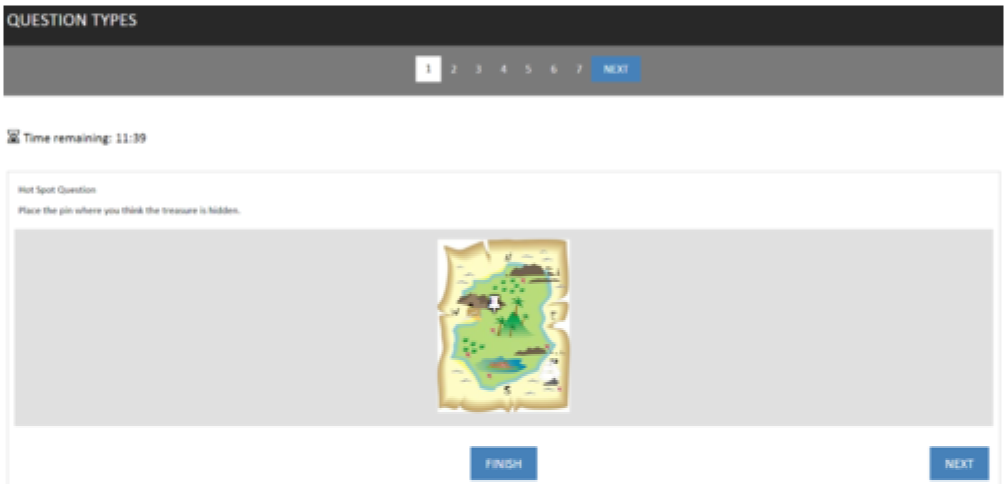
Pick Correct



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

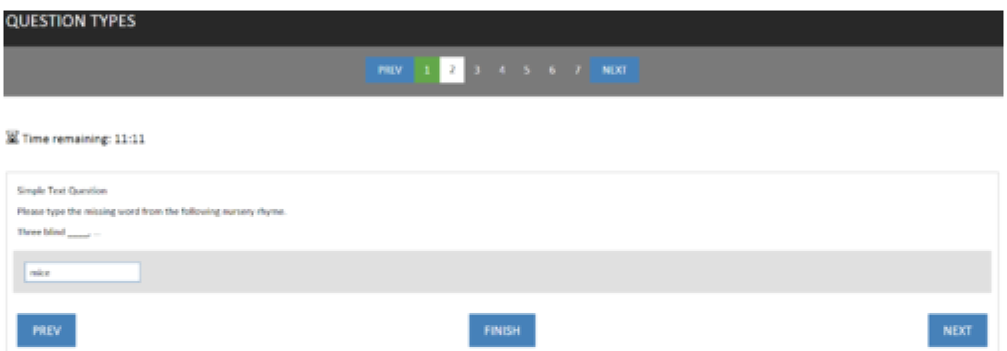
Not all questions will specifically ask for X correct answers so it is important to remember when the answers use a ‘check box’ ◈ you can select more than one answer. If the answers are marked with a radio button ◈ then the question is a Multiple Choice and only one answer can be selected.

Hot Spot



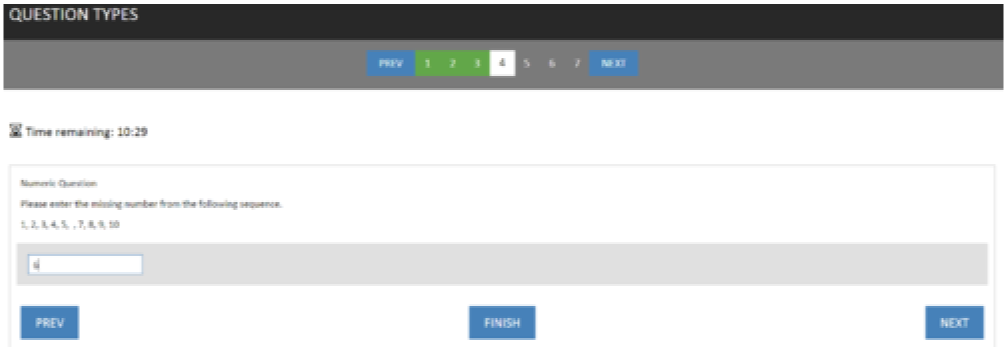
Hot Spot questions test you understanding by asking you to identify a specific item ion a picture. This could be along the lines of ‘Please identify the power button on our new product.’ In the example above the question is just for fun and you have to guess where the treasure has been buried.

Text



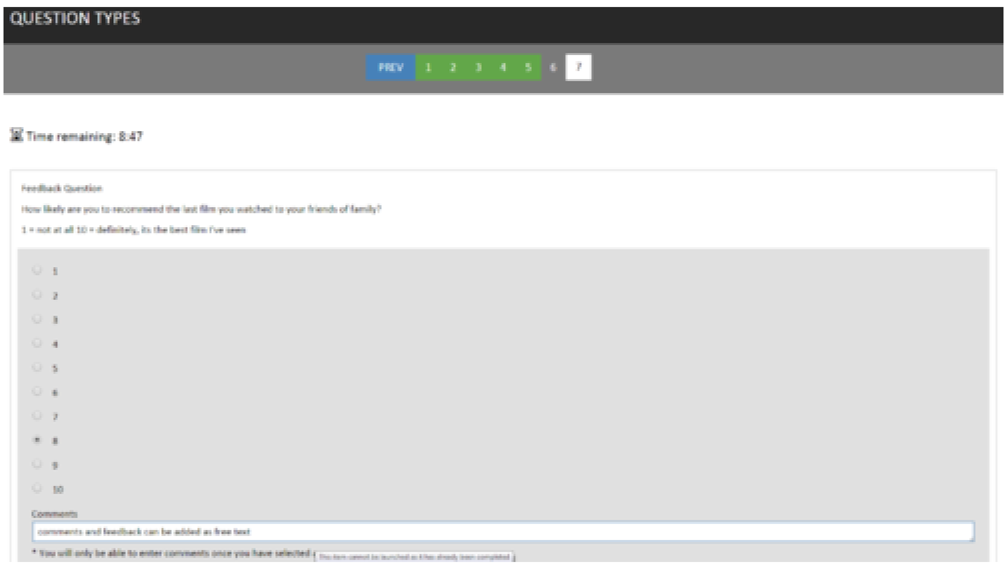
Text questions require you to provide either a single work or simple phrase to assess whether you know the correct term, name or phrase.

Numeric



Numeric questions are similar to Text questions, except the answer is always 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?’

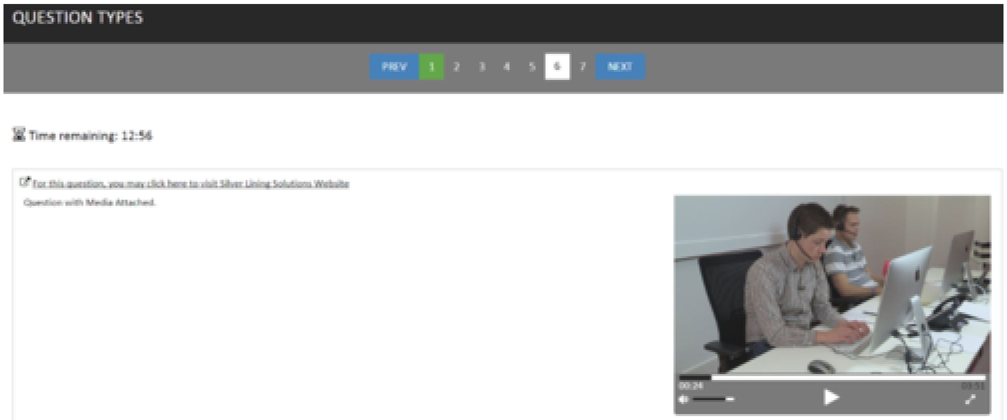
In a work environment you may see questions along the lines of:

- How would you rate this Assessment / 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?

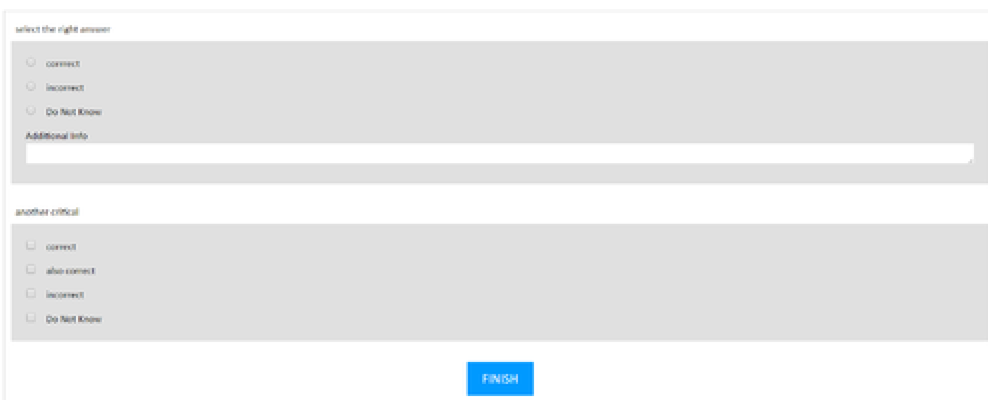
Feedback questions can have any scale and in some cases the scale might be replaced with phrases rather than numbers.

Media within questions.

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



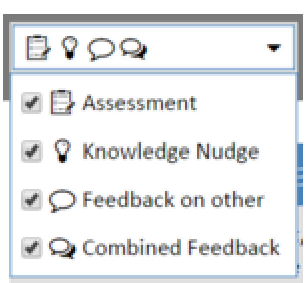
Additional Info



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.

Feedback Assessments

If a feedback assessment has been assigned to you to complete for one of your team members, this will appear in the list of assessments. You can view just these assessments via the filters.



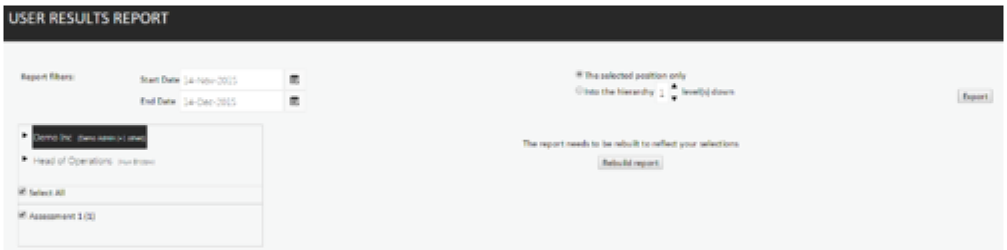
Click the individuals name to select the assessment to complete.

Work through the assessment selecting the relevant answer.

You can also have the option of completing **combined feedback assessments**. These assessments allow you to see the employee’s results, your own feedback results and then enter the agreed combined results.

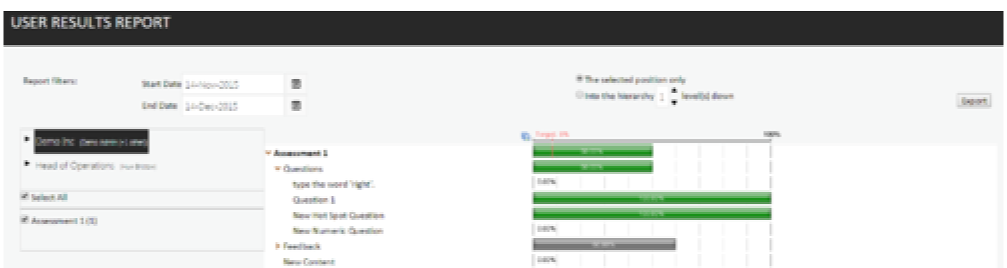
Viewing Results

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.



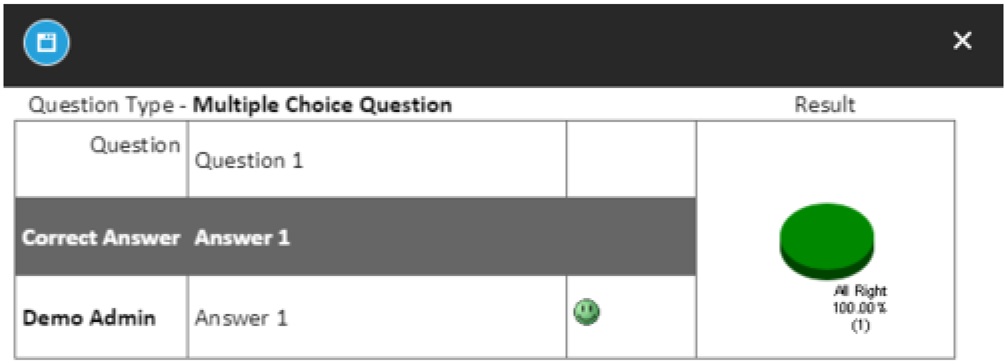
- Select required date range.
- From the hierarchy view select the hierarchy level or individual.
- Select the assessments from the bottom left hand window. These are all of the assessments that the individual has completed.
- Click **Rebuild report** to view the results.

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.

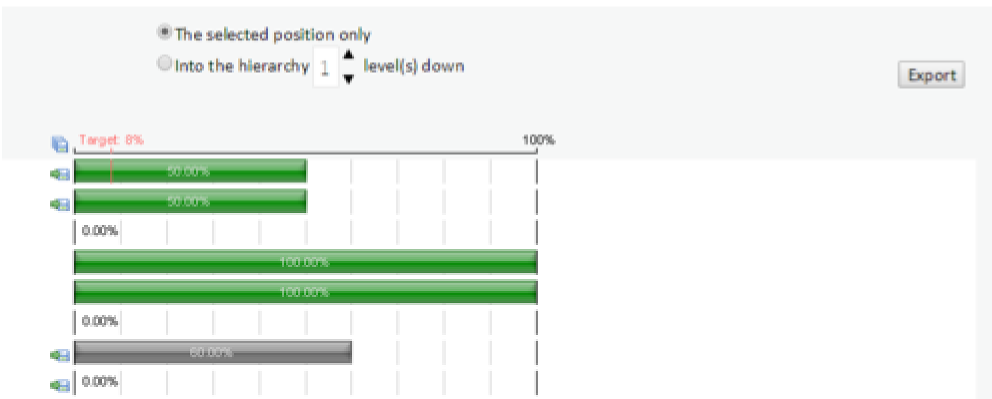


Right-click a question to **View Detail** about a question.

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.

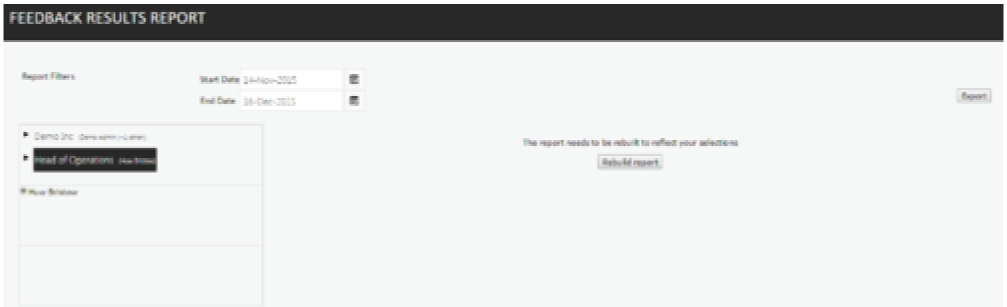


Click the disk icon to select the level of data that you want to export. After selecting your required level of data aggregation click the Export button to download the data as a CSV file.

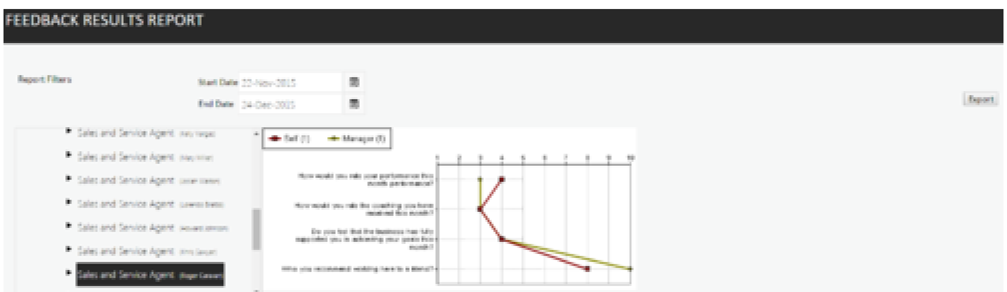
Viewing Feedback Results

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.

Managing and Viewing Crystal Reports

Optimizer supports importing and viewing custom-designed Crystal Reports. 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 (for example Chrome, Firefox and Safari).

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.

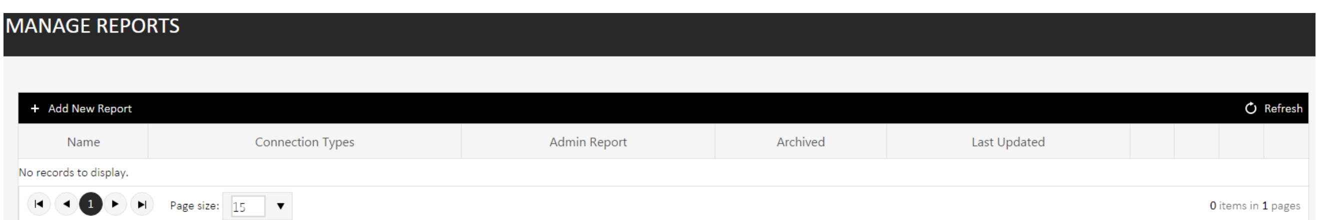
To create a new category, first select the parent category (i.e. the one that you want the new category to be under in the hierarchy), then click the green ‘+’ icon.

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 Optimizer, Planner and DNA users, and any combination of the three 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 Optimizer. This will result in the report file being retained by the server; however, it will not be accessible via Optimizer. 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

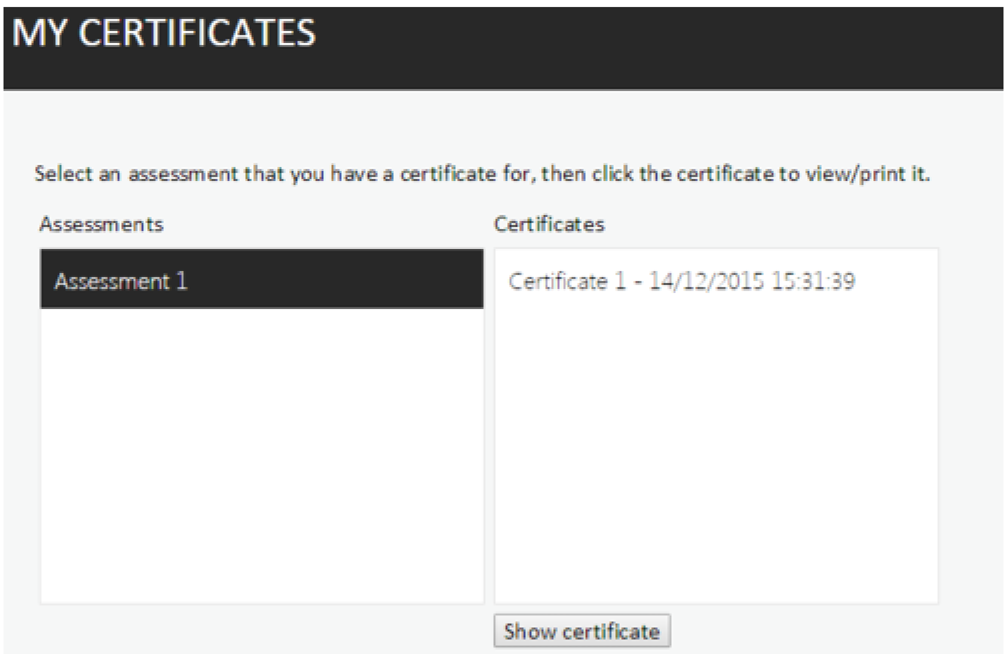
Reports can be generated from the ‘View Reports’ page. The page will initially display the category hierarchy, including the reports that have been allocated to each category. Browse the category hierarchy and select the report that you want to view. A Crystal Reports popup window will appear. Depending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

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.



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.

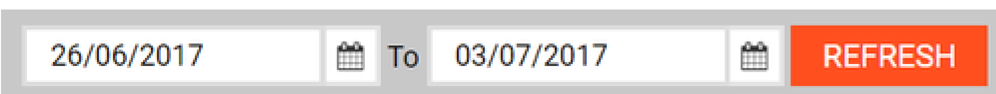
This allows visibility of where there is a potential training requirement or where performance has exceeded expectation.

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.

My DNA

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

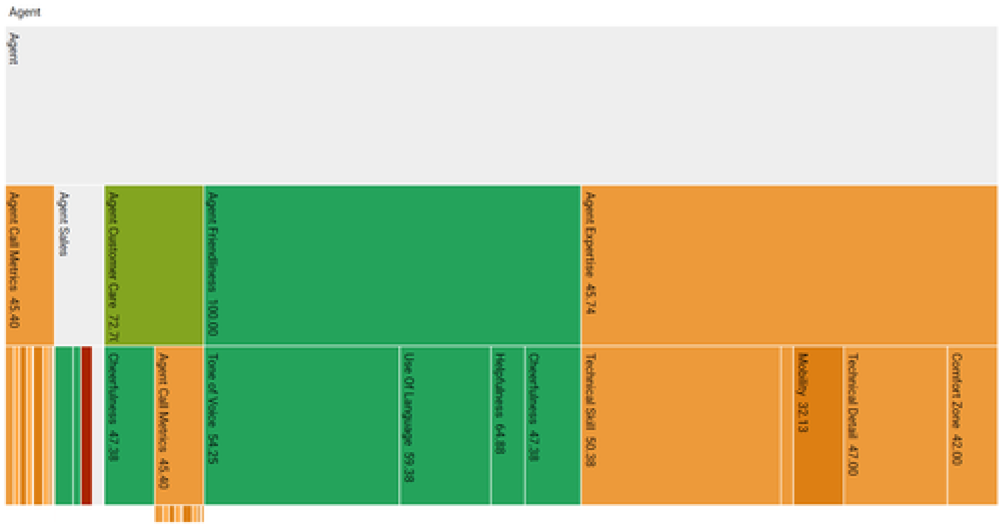
Date Range



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

Data Visualization

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 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.

Data Issues

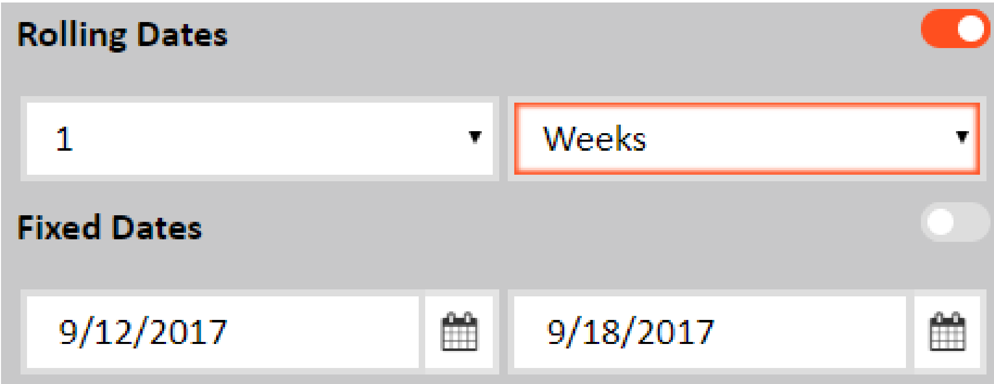
Should there be any issues with the date returned these will be shown in expandable summaries above each **Strand**.

View Filtered DNA

The **View Filtered DNA** page shows user performance for Strands and User Demographics where users fall into each threshold band. Initially it shows a chart for each User Demographic, then for each strand selected. The chart(s) display the percentages of users within each threshold band.

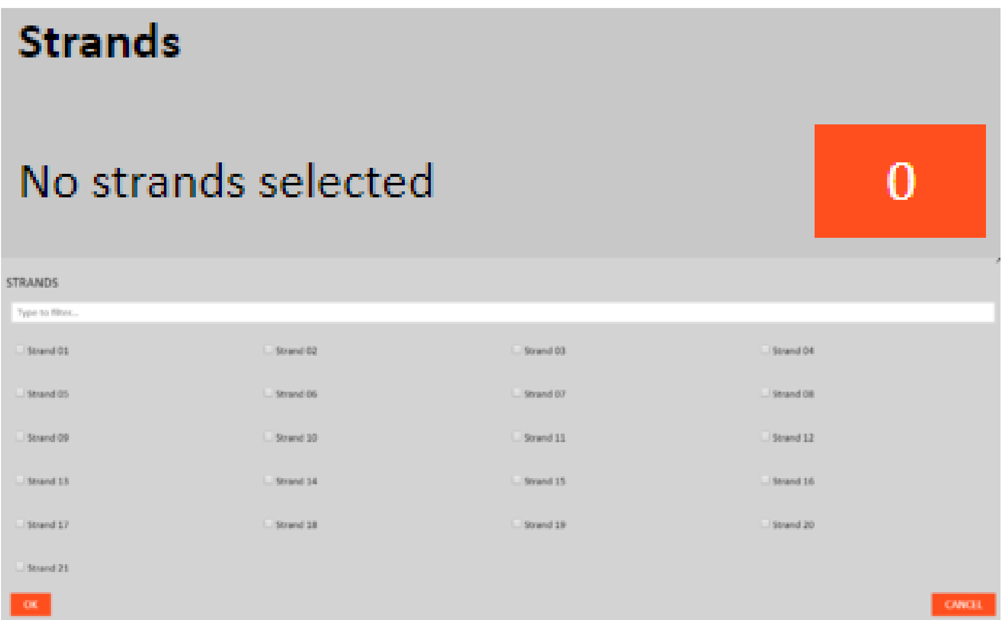
Date Range

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.



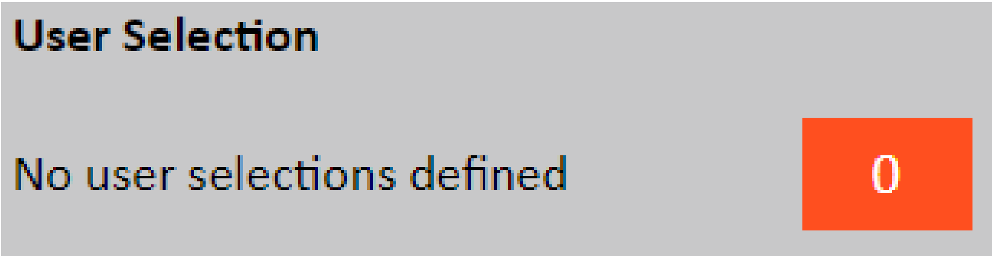
Strand Selector

Select Strand(s) by clicking the orange button beneath Strands and selecting the relevant strands from the modal and clicking ‘OK’, clicking ‘CANCEL’ will remove all selections you have made. A maximum of 10 strands can be selected, if more than 10 are selected it will disable the ‘OK’ button.



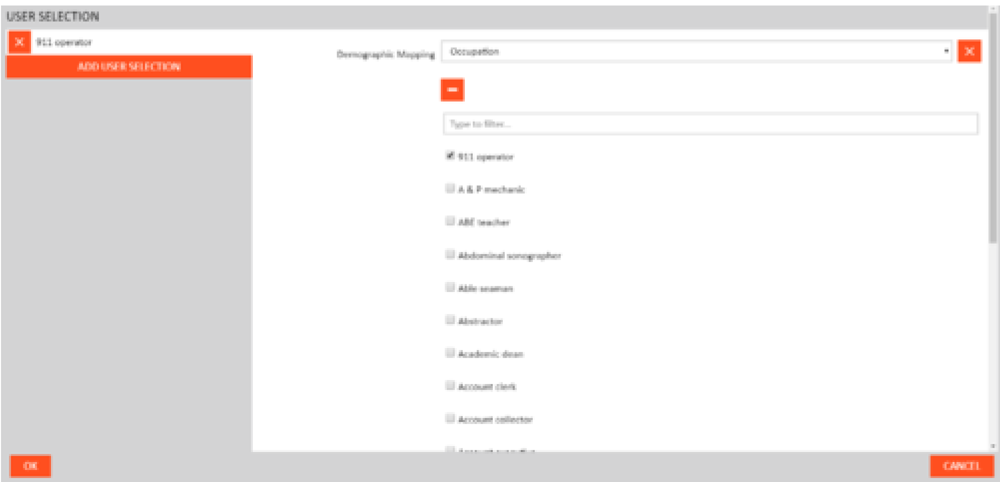
User Selection

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.

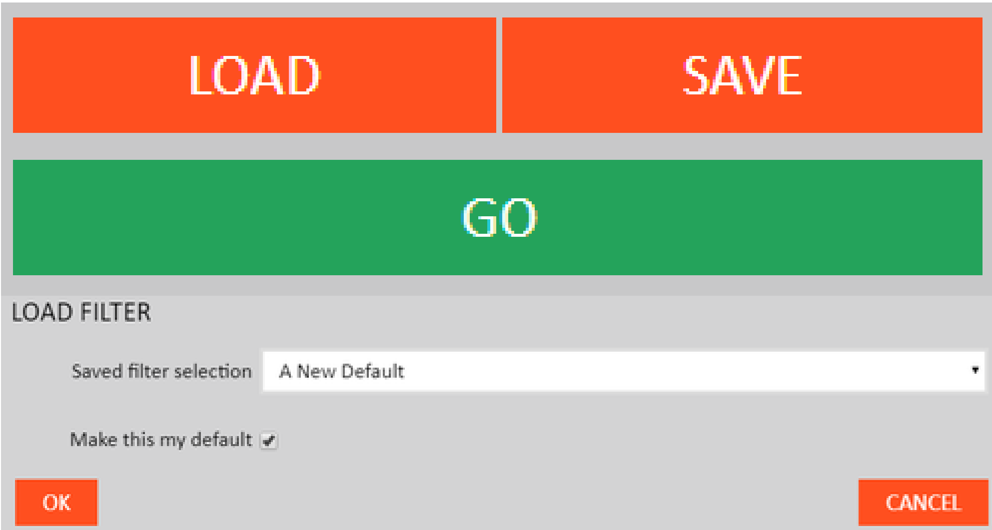
The right-hand side of the dialog displays the currently highlighted demographic grouping. Each grouping consists of a **Percentile Range** and zero or more **Demographic Mappings**.



The **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.

Once all your filters have been selected, click ‘GO’ to get the threshold band chart(s).

Data Visualization

The charts below show users grouped into the relevant threshold bands for their aggregated BDD/ Calculated results per Strand/Demographic. Clicking the colored circles in the top right corner of each chart will toggle that bar for that chart on and off.

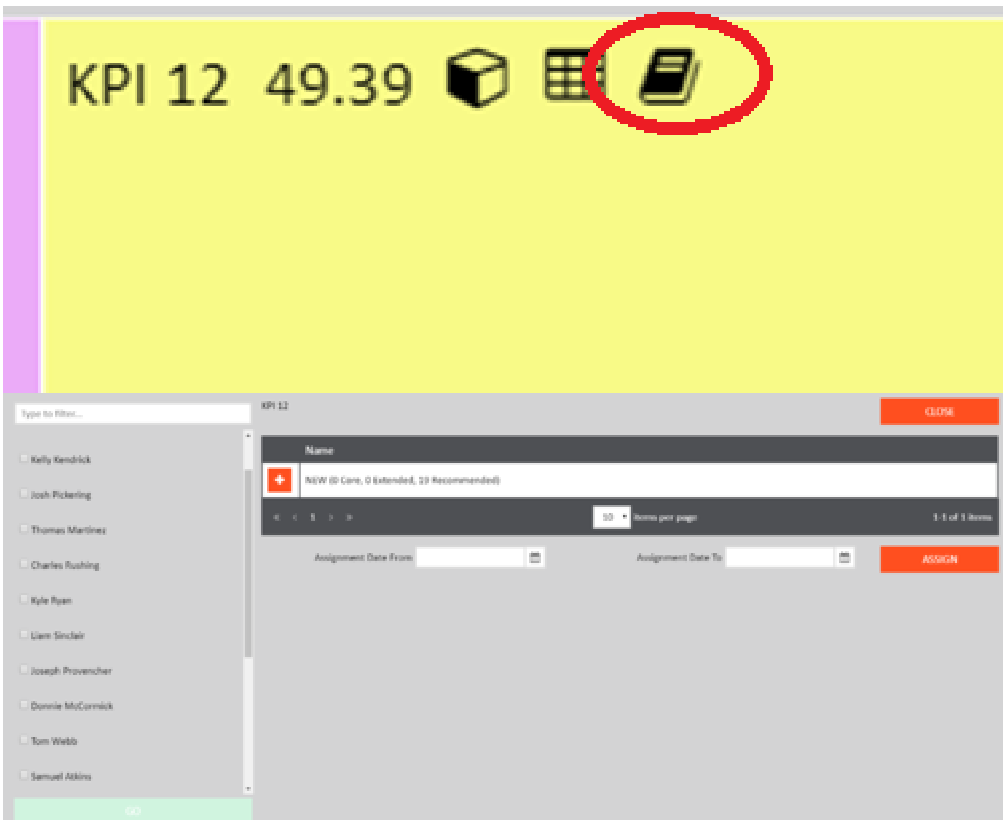
Threshold Band Data

To see the data for a given bar you can click a bar within a single chart and it will bring up the filtered detail window to show all data for that threshold band. You can then see the individual breakdowns within the partition chart and a list of users to filter by.

You can reduce the number of users shown by searching for a user(s) by searching for them via the filter box.

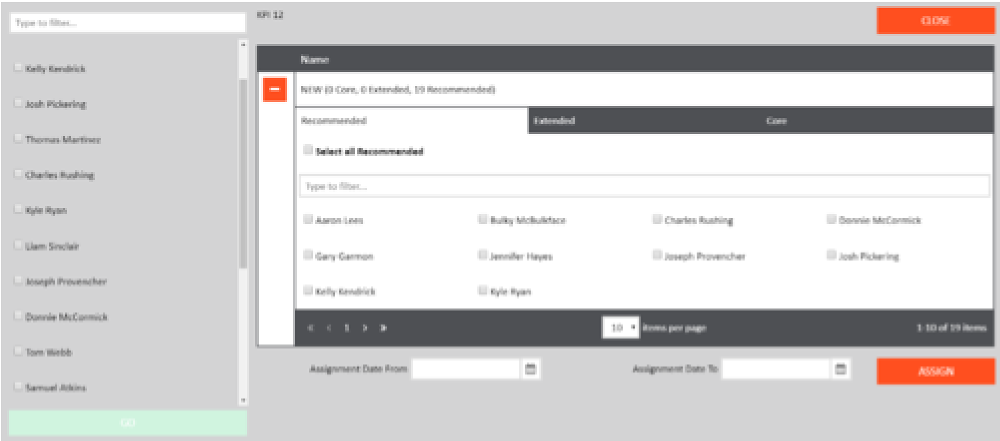
Assign Users to Learning Item(s)

Clicking on the book icon (furthest right in the icon list) will show the Learning Item Assignments grid.

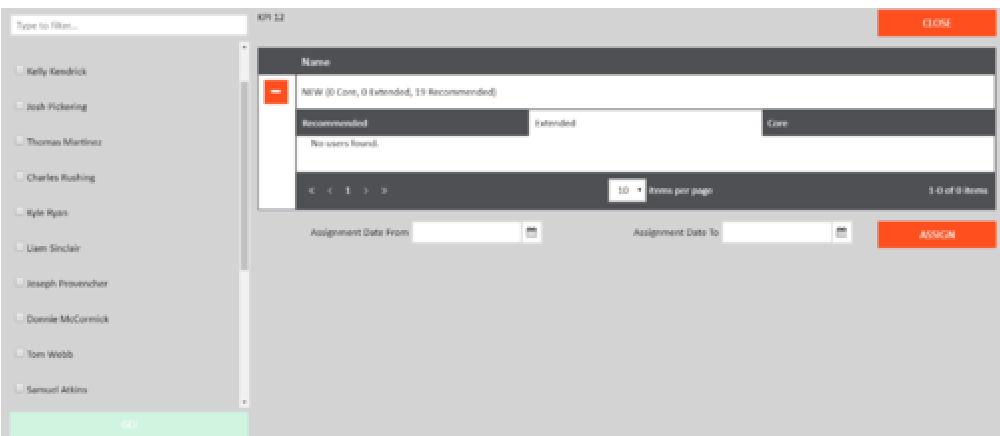


Clicking the + button expands the grid to show the users for each learning based on Recommended, Core or Extended.

Clicking ‘CLOSE’ at any stage will return to the partition chart cancelling any existing selections made. Users can be found within the individual tabs for each recommendation type and results are paged per tab, the number of results can be adjusted by changing items per page.



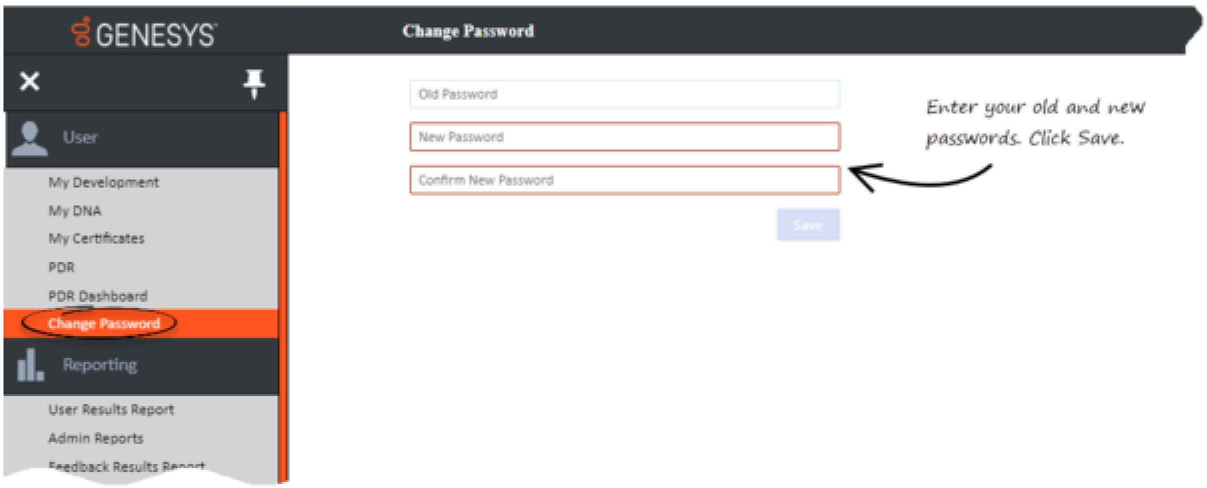
Selecting users from within a tab and then switching to another will remember your options. This is so that users can be selected for all recommendation types, for all returned learning items and assigned in bulk. Once all users have been selected for assignment, select the assignment from and to date and click ‘Assign’.



If the assign is successful it will close the Learning Item Assignment and return to the partition chart and all users selected will be placed in the assignment queue.

Changing Your Password

To change your account password, select **Change Password** from the **User** menu. You will be prompted to enter your existing password and new password. Enter the passwords, and then click **Save**.



Important

- If you are signed into Performance DNA (PDNA) through a third party authentication provider such as Google, you cannot change your password from **Change Password** screen. Instead, you must change your password by using the change password functionality offered by your authentication provider.
- You can change your password only if your role has access to **Change Password** menu. If you do not see the **Change Password** menu in PDNA, contact your administrator.

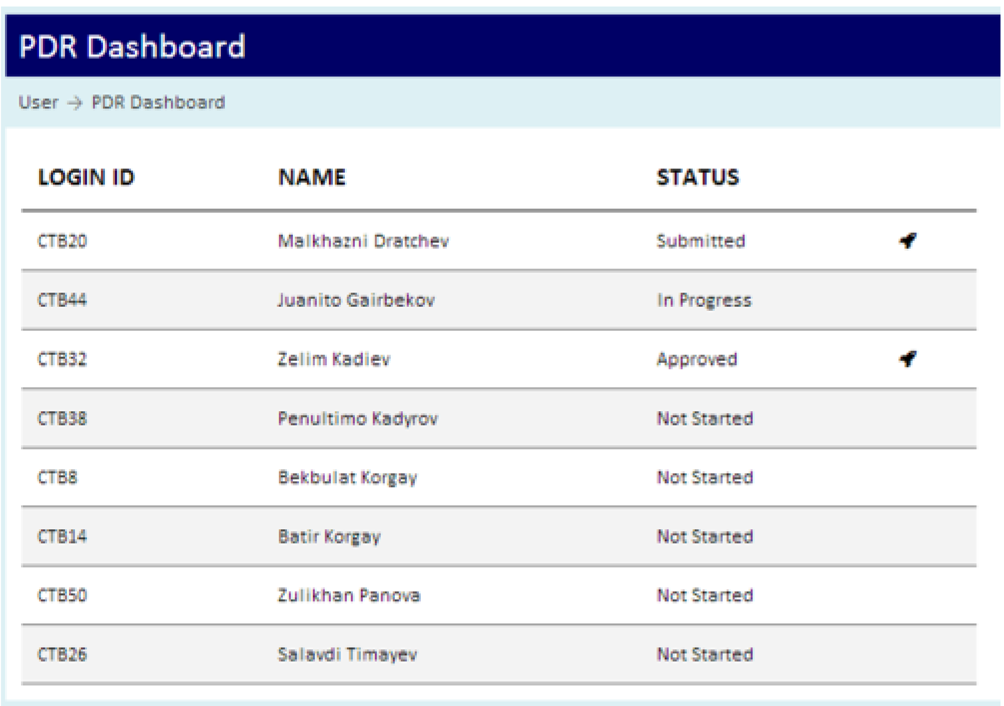
Personal Development Reviews

The new PDR feature allows agents to specify their personal development objectives and have these objectives reviewed and approved by their manager.

The feature is divided into two new widgets: PDR and PDR Dashboard. The PDR page is primarily for agents to define their development objectives, whilst the dashboard allows managers to edit, approve and check the status of their reports' PDRs.

PDR Dashboard Widget

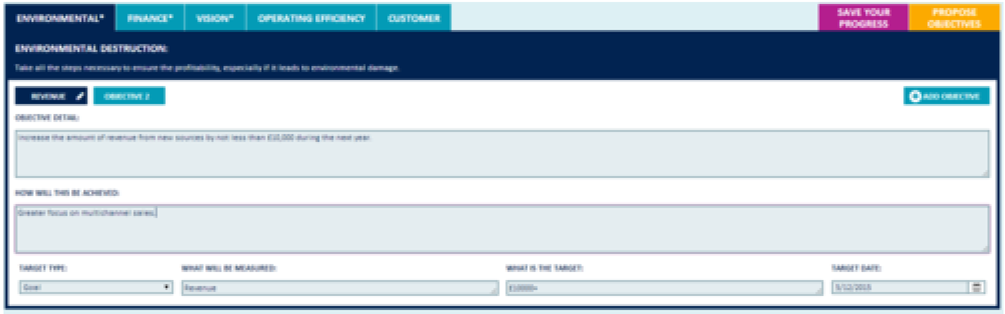
Managers can view the status of their reports' PDRs, as well as edit and approve PDR objectives submitted by their reports via the **PDR Dashboard** widget.


PDR Dashboard

User → PDR Dashboard

LOGIN ID	NAME	STATUS
CTB20	Malkhazni Dratchev	Submitted
CTB44	Juanito Gairbekov	In Progress
CTB32	Zelim Kadiev	Approved
CTB38	Penultimo Kadyrov	Not Started
CTB8	Bekbulat Korgay	Not Started
CTB14	Batir Korgay	Not Started
CTB50	Zulikhan Panova	Not Started
CTB26	Salavdi Timayev	Not Started

Selecting the **PDR Dashboard** widget from the navigation menu will display the logged-in manager's list of direct reports, including their Login ID, name and PDR status. The status column will contain either: **Not started**, **In Progress**, **Submitted for Approval** (available for review and approval by the manager) or **Approved** (for PDRs that have been approved by the manager). Reports' PDRs will become available for viewing and editing by the manager once they've been submitted. Once a PDR has been approved it will become available to both the agent and manager in read-only mode.



PDR Dashboard Widget

Managers will only be able to see the PDRs of users who are directly below them in the hierarchy.

Logging Out

To logout, ensure that you have no open assessments and then click **Logout** link as shown below.