

Competencies & Certifications Module User Guide

Version 4.8.4.45



For Microsoft SharePoint Server

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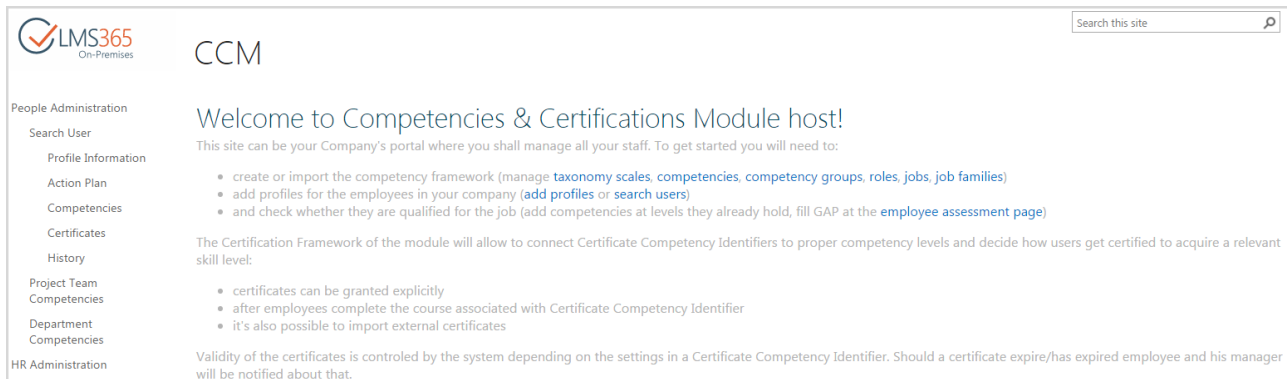
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1 SHAREPOINT CCM HOST HOME PAGE

The Competencies & Certifications Module home page is the first page that appears after the successful user authorization:



For more information on the access levels, see chapter ["User Roles and Permissions"](#).

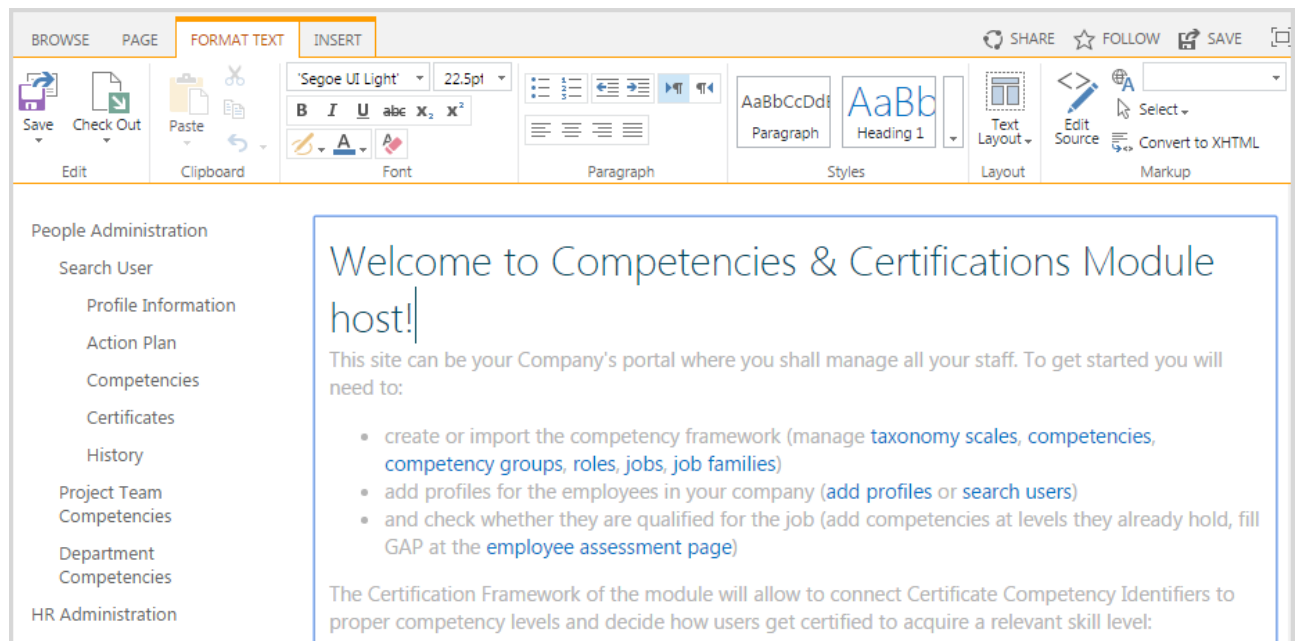
By default, the following web parts are shown once the user navigates the home page:

- Announcements – displays the information regarding the announcement for the considered organization;
- My Project Teams – shows the list of the SharePoint CCM current project teams;
- Project Team Details – contains the main information about project teams;
- Surveys – shows the list of SharePoint CCM current surveys;
- My Competencies – shows the list of current competencies;
- My Action Plan – shows pending competencies, and suggested competencies grouped by roles from Action Plan;
- My Profile – allows to see the user detailed information;
- My Organization Details – shows details about your current organization;
- My Organization Hierarchy – shows hierarchy of your current organization.

For more information on Web Parts see chapter ["Competencies and Certification Module Web Parts"](#).

You can customize the visual representation of the home page in the following way :

- to edit the content and web parts of the home page select **Edit Page** from the Settings (⚙️) menu. You will be switched to the edit mode:





Make the necessary changes to the page. You can enter a special edit mode for each Web Part by clicking on its field (e.g. for 'Content' Web Part 'Format Text' and 'Insert' tabs will appear letting the user manage text font styles; insert tables, pictures, files etc.)

- to change left navigation headings and links go to **Site Actions > Site Settings > Look and Feel > Quick Launch**. You can create New Navigation Link, New Heading and Change Order of links on this page:

Site Settings ▸ Quick Launch ⓘ

People Administration

 New Navigation Link |  New Heading |  Change Order |  Revert to default

Search User

Profile Information

Action Plan

Competencies

Certificates

History

Project Team

Competencies

Department

Competencies

HR Administration

Organizations

Taxonomy Scales

Competencies

Competency Groups

Roles

Jobs

Job Families

Project Teams


Notifications


Email Templates


Personal Profiles

Relationships


Announcements


 People Administration


 Search User


 Profile Information


 Action Plan


 Competencies


 Certificates


 History

 Project Team Competencies


 Department Competencies


 HR Administration

 Organizations

 Taxonomy Scales

 Competencies

 Competency Groups

 Roles


 Jobs

 Job Families

 Project Teams

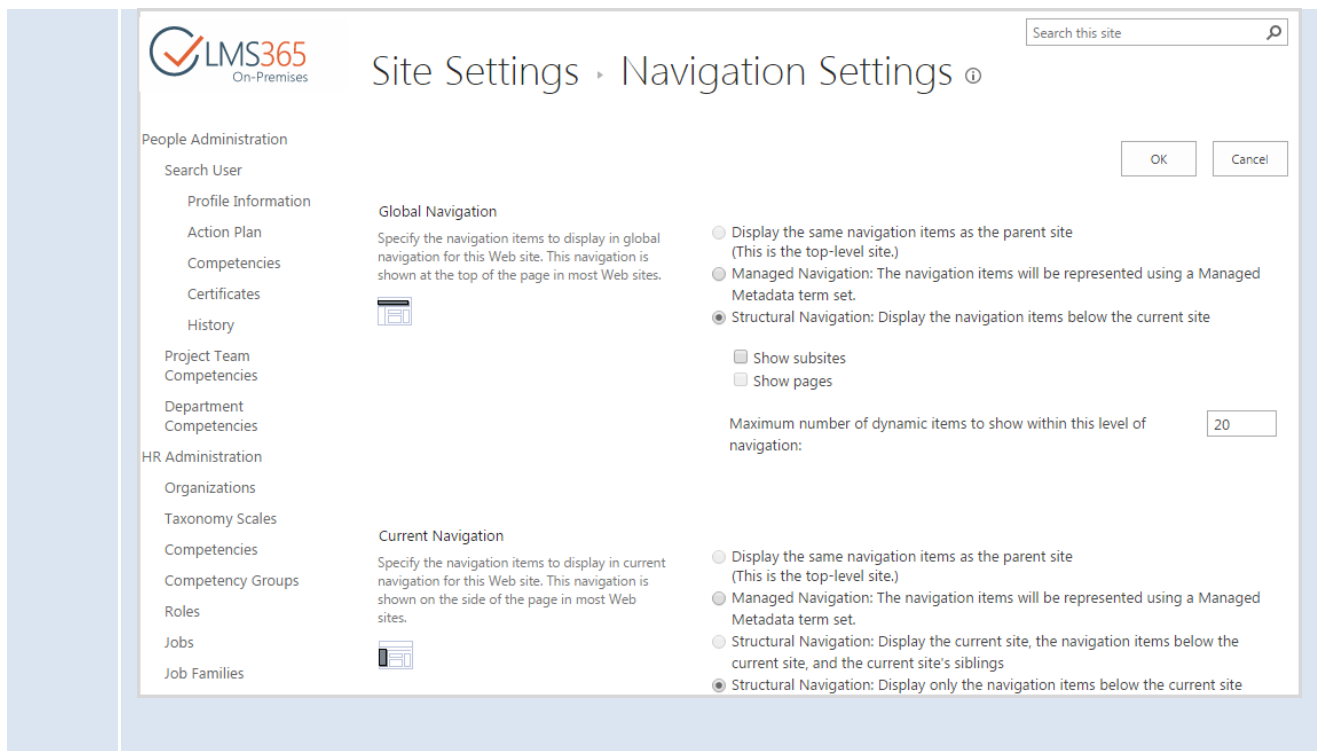
 Notifications

 Email Templates

 Personal Profiles

 Relationships

NOTE: To get access to Global and Current Navigation settings use direct link '[_layouts/15/AreaNavigationSettings.aspx?force=1](#)'
On this page you can the top link bar and left navigation menu settings:



The screenshot shows the 'Site Settings - Navigation Settings' page in LMS365. The page is divided into two main sections: 'Global Navigation' and 'Current Navigation'. Each section has a description and a list of radio button options for navigation styles. The 'Global Navigation' section includes checkboxes for 'Show subsites' and 'Show pages', and a text box for 'Maximum number of dynamic items to show within this level of navigation' set to 20. The 'Current Navigation' section also includes a 'Maximum number of dynamic items to show within this level of navigation' text box set to 20. A left-hand navigation menu lists various administrative tasks like 'People Administration', 'HR Administration', and 'Project Team Competencies'. A search bar is located at the top right of the page.

2 USER ROLES AND PERMISSIONS

This Administrator Guide is intended to be a reference point for Global Administrators, People Administrators, Project Team Leaders and Managers in performing their daily tasks within the Competency and Certification Module. These are main roles for people that will use this Guide:

2.1 Global Administrator

Global Administrator performs the following activities:

- Manages the Organizational Structure of the company (add/edit/delete organizations);
- Manages the Employee Profile Structure (add/edit/delete employee profile's metadata attributes);
- Manages the Project Team Profile Structure (add/edit/delete project team profile's attributes);
- Manages the Competency Framework (add/edit/delete competencies (including taxonomy scales, levels and behavioral indicators), competency group, roles, jobs, job families);
- Manages Certificate templates;
- Manages the Survey Template Repository (add/edit/delete);

- Manages the Announcements (from global level down to organizations, project teams and employees).

2.2 People Administrator

People Administrator performs the following activities:

- Manages the Employee profile (add/edit/delete information in the employee's profile);
- Manages the Employee Action Plan (add/edit but NOT DELETE items in the action plan since the completed items will be checked as "Acquired" and remain in the Action Plan);
- Manages the Employee Personal Competencies (add/edit/delete acquired competencies based on GAP analysis);
- Manages the Employee Personal Certifications (grant/revoke/view certifications);
- Compiles surveys based on available survey templates and making them available for specific subscription groups);
- Manages the announcements (from organization's level down to project teams and employees).

2.3 Project Team Leader

Project Team leader is a member of the project team that coordinates team efforts, represents the team and makes decisions concerning the team.

Project Team Leader performs the following activities:

- Manages the Project Team Profiles (add/edit/delete project team members);
- Manages the Project Team Members Profiles (modify values of fields that are allowed by Global Administrator);
- Manages the Project Team Members Personal Competencies (add/edit/delete acquired competencies based on GAP analysis);
- Manages the Project Team Members Personal Certifications (grant/suspend/view certifications);
- Manages the Project Team Members Action Plan (view/add/edit/delete suggested items);
- Manages the announcements (on team's level).

2.4 Manager Provider

Manager performs the following activities:

- Manages the Employee profile (modify values of fields that are allowed by Global Administrator);
- Manages the Employee Action Plan (view/add/edit/delete suggested items);
- Manages the Employee Personal Competencies (add/view/edit acquired competencies based on GAP analysis);
- Manages the Employee Personal Certifications (view certifications).

SharePoint CCM is the only source of Manager for other ELEARNINGFORCE products (SharePoint REM, SharePoint Dashboard, SharePoint Reporting Center). SharePoint CCM has 3 types of Managers which can be assigned to user in the following way:

- *Manager* – is assigned in 'Manager' field of CCM User Profile, can be a single user only (see more details in section 4.11 [Personal Profiles](#));
- *HR Responsible* – is assigned in 'HR responsible' field of CCM User Profile, can be a single user or AD group or FBA role (see more details in section 4.11 [Personal Profiles](#));
- *Additional Manager* – is assigned in the custom "Relationships" list, can be a single user (see more details in section 4.12 [Relationships](#)).

Managers can perform the following exclusive operations in other ELEARNINGFORCE products (SharePoint REM, SharePoint Dashboard, SharePoint Reporting Center):

- Enroll themselves and their employees to courses on REM host;
- Perform manager activities for user management on Dashboard (see more details in LMS365 On-premises REM User Guide section 5.3. [Manager's Operations](#));
- Report on themselves and their employees in Reporting Center.

NOTE:	Dashboard will recognize <i>Active</i> profiles along with <i>Incomplete</i> ones. <i>Deactivated</i> profiles are not considered by the system.
NOTE:	Managers and HR Responsibilities are synchronized to REM SharePoint groups via timer job (ELEARNINGFORCE - REM: Managers synchronizer job). This job synchronizes managers from Relationships list to REM Line Managers group according to CCM to REM Synchronization Settings.
NOTE:	Managers and HR Responsibilities with deactivated CCM profiles are not synchronized to REM SharePoint groups.

All 3 types of Managers have equal permissions within CCM (for more information about manager permissions see table in section 2.5 [Permissions](#)).

2.5 Permissions

Depending on their role users have different permissions to perform actions in the Competency and Certification Module. In the table below default permissions are shown:

Role Actions	Global Admin	People Administrator	Project Team Leader	Employee	Manager Provider
Create Organization	Yes	No	No	No	No
Edit Organization	Yes	No	No	No	No
Delete Organization	Yes	No	No	No	No
View Organization Profile	Yes	Yes	Yes	Yes	Yes
Upload Attachment	Yes	Yes	Yes	No	No
Edit Attachment	Yes	Yes	Yes	No	No
Delete Attachment	Yes	Yes	Yes	No	No
View Attachment	Yes	Yes	Yes	Yes	Yes
Manage Competency Framework	Full control	No	No	No	No
Manage Certificate Templates	Full control	No	No	No	No
Suggest Competency/Role	Full control	Full control	Full control within Team	View only his own Action Plan's suggested items	Full control for Subordinates within Organization
Personal Competencies Management	Full control	Full control	Full control within Team	View only his own Personal Competencies	Full control for Subordinates within Organization
Personal Certification Management	View	View	View	View	View

Email Templates Management	Full	No	No	No	No
Notification Rules Management	Full	No	No	No	No
Announcement Management	Full (including Global Announcements)	Full control	Full control within Team	Limited to View only the announcement to which he is a member of Target audience	Limited to View only the announcement to which he is a member of Target audience
Manage Employee Profile attributes	Full control including modify/delete properties, allowing to edit values of some of the properties by other actors	No	No	No	No
Add Employee	Full control	Full control	No	No	No
Edit Profile of Employee	Full	Full control	Limited to modify values fields that are allowed by Global Administrator	Limited to modify values fields that are allowed by Global Administrator	Limited to modify values fields that are allowed by Global Administrator for Subordinates
Delete Profile of Employee	Full	Full control	No	No	No
View Profile of Employee	Full	Full control	Full within Team	Limited to view only his own Profile	Full within Subordinates

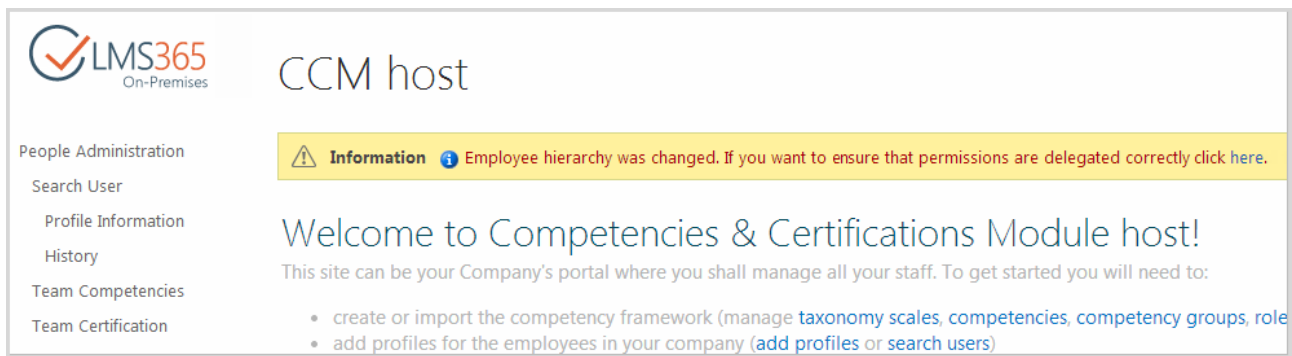
Manage Project Team Profile attributes	Full control in addition to define/modify/view Team Profile structure	No	No	No	No
Add Project Team	Full	Full	No	No	No
Edit Project Team	Full	Full	No	No	No
Delete Project Team	Full	Full	No	No	No
View Project Team Profile	Full	Within Organization	Only his Team	Only the Team he is a member of	Only the Team he is a member of
Project Team Competencies	Full	Full control	Full within Team	No	No
Survey Template Repository Management	Full	Full control	No	No	No
Publish Survey	Full	Full	Full	No	No
Take Survey	Full	Full	Full	Full	Full

NOTE: Global Administrator can allow modifying values of certain profiles fields for Project Team Leader and Manager via [Security column settings](#).

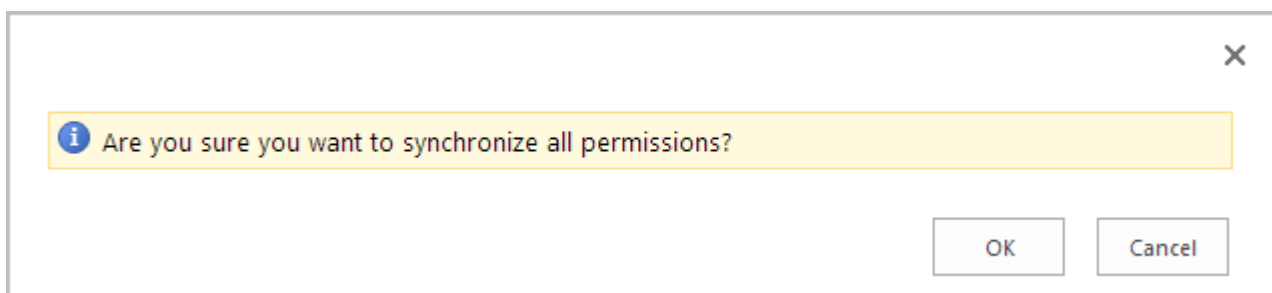
Users' permissions are changed after the following actions:

- Add/Delete User Profile;
- Add/Edit User's Manager;
- Create/Delete Project Team;
- Edit Project Team Members.

After such actions a warning message is displayed about changes in the hierarchy:



To apply permissions changes, click the link in the message to run the EARNINGFORCE - CCM: Permissions Sync Job and confirm synchronization:



Alternatively, you can wait until permissions are updated by the EARNINGFORCE - CCM: Permissions Sync Job, after the job is run next time.

In order to change the settings of the job, follow the steps below:

- 1) Navigate to the Central Administration;
- 2) Choose Check job status in the Monitoring;
- 3) Choose the EARNINGFORCE - CCM: Permissions Sync Job;
- 4) Set the run time to the desired interval:

S

Edit Timer Job ⓘ

Timer Links
[Timer Job Status](#)
[Scheduled Jobs](#)
[Running Jobs](#)
[Job History](#)
[Job Definitions](#)

Central Administration
[Application Management](#)
[System Settings](#)
[Monitoring](#)
[Backup and Restore](#)
[Security](#)
[Upgrade and Migration](#)
[General Application Settings](#)
[Apps](#)
[Office 365](#)
[Configuration Wizards](#)

Job Title	ELEARNINGFORCE - CCM: Permissions Sync Job		
Job Description	Synchronizes permissions hierarchy of managers and employees, project team leaders and project team members for CCM Host.		
Job Properties	Web application:	SharePoint - 80	
	Last run time:	3/9/2016 12:06 AM	
Recurring Schedule	<div style="border: 1px solid red; padding: 5px;"> <p>This timer job is scheduled to run:</p> <p><input type="radio"/> Minutes Starting every day between</p> <p><input type="radio"/> Hourly 12 AM ▼ 00 ▼</p> <p><input checked="" type="radio"/> Daily and no later than</p> <p><input type="radio"/> Weekly 1 AM ▼ 00 ▼</p> <p><input type="radio"/> Monthly</p> </div>		

Use this section to modify the schedule specifying when the timer job will run. Daily, weekly, and monthly schedules also include a window of execution. The timer service will pick a random time within this interval to begin executing the job on each applicable server. This feature is appropriate for high-load jobs which run on multiple servers on the farm. Running this type of job on all the servers simultaneously might place an unreasonable load on the farm. To specify an exact starting time, set the beginning and ending times of the interval to the same value.

Run Now Disable OK Cancel

5) Click OK button to save the new settings for the timer job.




3 COMPETENCIES AND CERTIFICATION MODULE WEB PARTS

Default SharePoint CCM Web parts are the following:

Announcements


There are no items to display

My Teams

-  Peter's Barista Team
-  PowerObjects
-  Team Subaru Canada

Team Details

Project Team: Peter's Barista Tr ▾

 **Peter's Barista Team**
 Team managed by Store Manager, Peter Bishop
[Additional info](#)

Surveys

There are no items to display

My Competencies



User: Natalia Buhtik

Competency Level	Value	Comments
Accounting-Average	3	
Business Conduct-Above Average	4	
Communication-Mastering Your Job	2	

[Manage user competencies](#)


Action Plan

User: Natalia Buhtik


Suggested Item	Is Acquired
 English - Spoken-Above Average	✕
 Self Management-Mastering Your Job	✕

[Manage action plan](#)

My Profile


Natalia Buhtik
[Additional info](#)

My Organization Details


Starcups
[Additional info](#)

My Organization Hierarchy

```

graph TD
    A[Starcups] --> B[User: Natalia Buhtik]
    B --> C[User: Learner 10]
    B --> D[User: Learner 1]
          
```

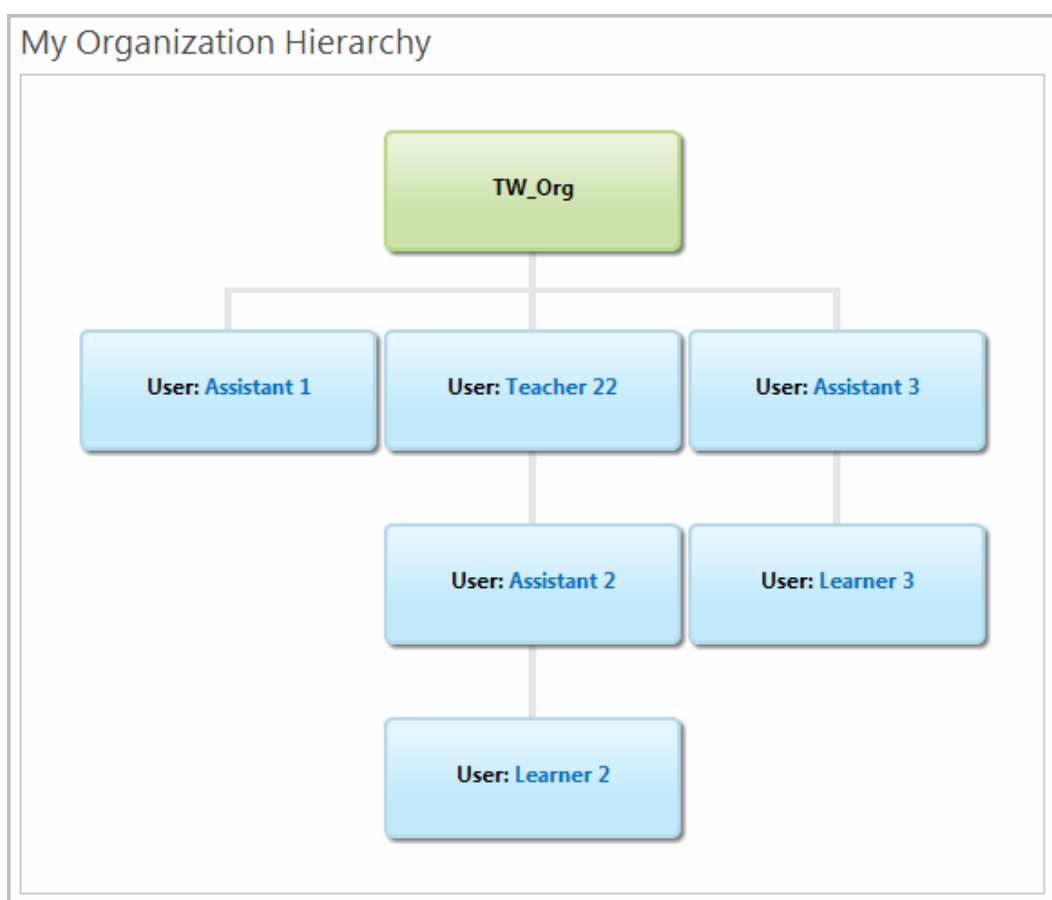
- Announcements – displays the information regarding the announcement for the considered organization;
- My Project Teams – shows the list of the SharePoint CCM current project teams;
- Project Team Details – contains the main information about project teams;
- Surveys – shows the list of SharePoint CCM current surveys;
- My Competencies – shows the list of current competencies;
- My Action Plan – shows pending competencies, and suggested competencies grouped by roles from Action Plan;

- My Profile – allows to see the user detailed information;
- My Organization Details – shows details about your current organization;
- My Organization Hierarchy – shows hierarchy of your current organization.

NOTE: It's not possible to use the CCM web parts outside the hosting CCM site collection when running multiple CCM hosts on same web application.

3.1 My Organization Hierarchy Web Part

This Web Part displays hierarchy of user's current organization:

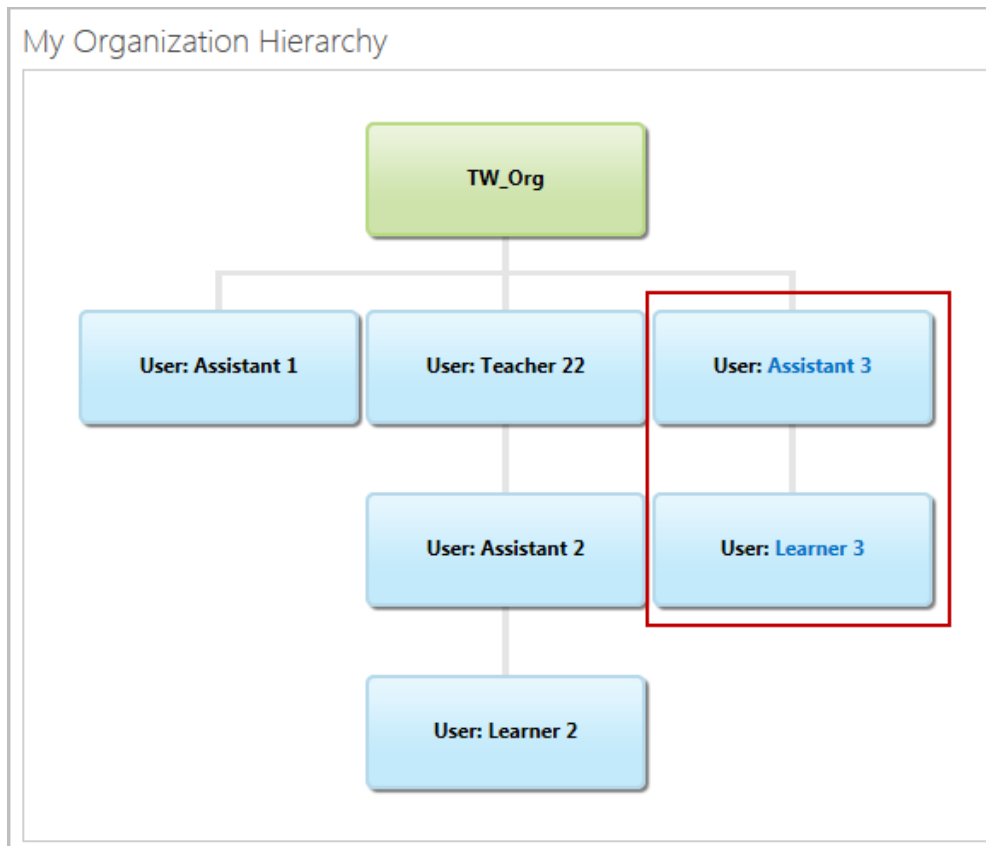


The structure of the organization hierarchy is built based on the information about Managers in User Profiles. Users added to 'HR Responsible' field and set as Managers in Relationships section are not displayed in the hierarchy. For the buildup of the hierarchy, only users with "Active" status are taken into consideration.

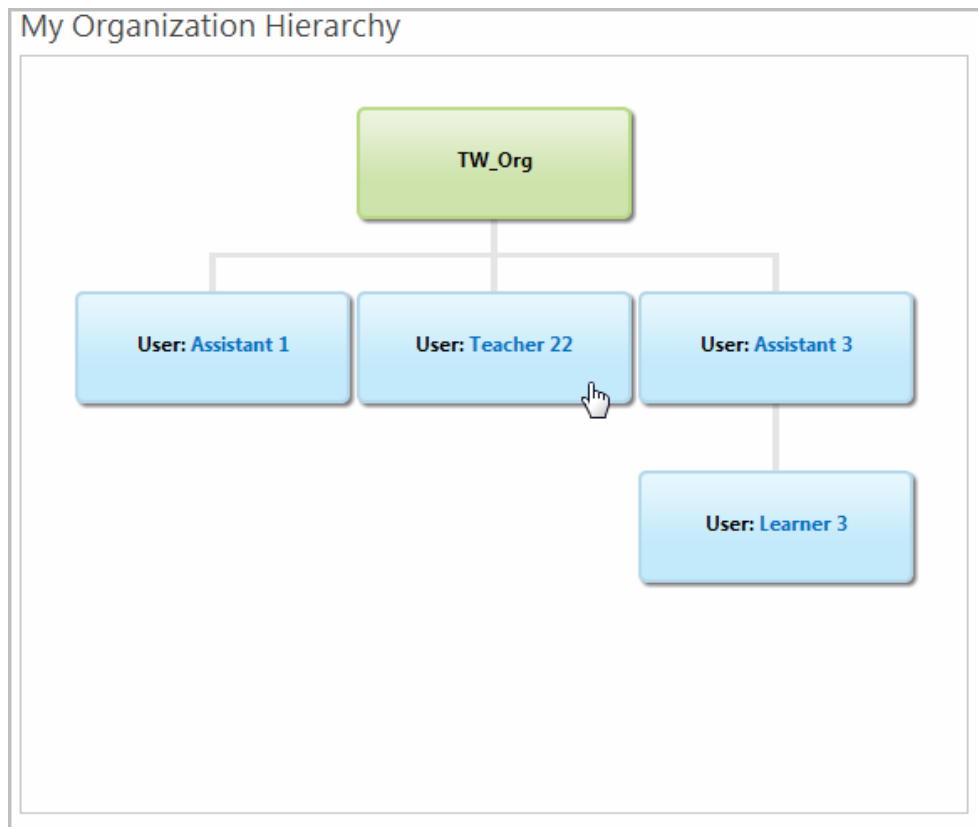
Deactivated users are displayed in the hierarchy only if they have subordinates. If deactivated users have no subordinates, they are hidden on My Organization Hierarchy web part.

Manager of any level of the organization hierarchy is able to edit information of employee who is lower in the hierarchy.

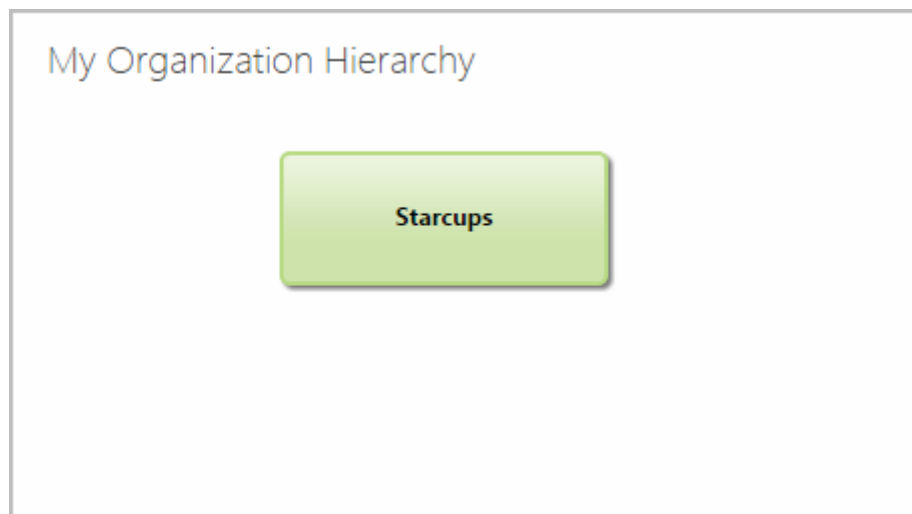
All members of current Organization are displayed to all users in the hierarchical order. User's name and names of his direct subordinates are clickable links to their User Profiles. For example, in the above Organization Assistant 2 sees only two clickable links: his own name and I2, all other names are not clickable for him:



Clicking on any user's tile hides all uses below:



Clicking on the tile with organization name hides the whole structure:




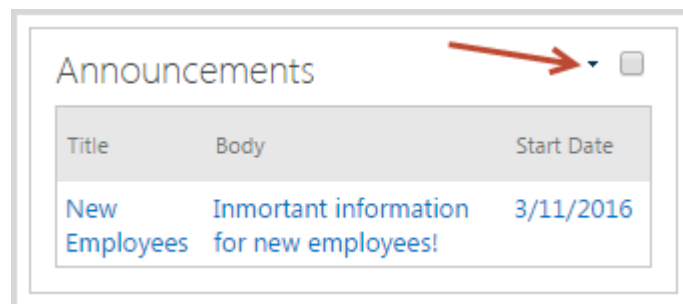
- NOTE:** If SharePoint CCM was updated from an older version in which Home Page was modified, 'My Organization Hierarchy' web part may not be added to the Home Page automatically. In this case add it manually:
1. Go to the Home Page edit mode;
 2. Select Insert > Web Part in the ribbon menu;
 3. Find "My Organization Hierarchy" in the Custom category and add it to the page.

3.2 Manage Web Parts

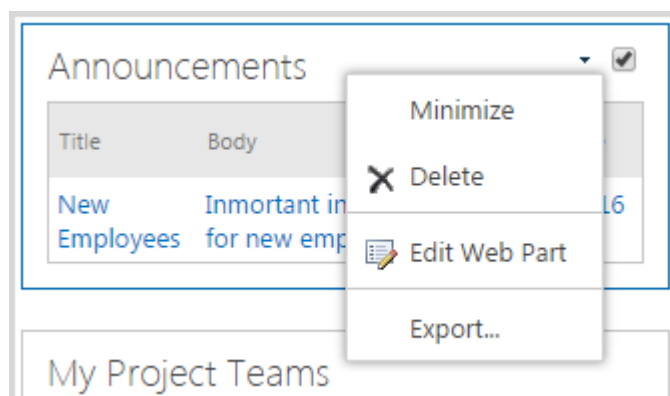
When users change pages and controls, it is possible to save settings for the user's personal preferences to display the future browser sessions in the way considered before.

To modify any Web Part displayed on the page, follow the steps described below:

- 1) Click the Edit ( EDIT) button on the ribbon to enter the Edit mode;
- 2) Put the cursor arrow against the needed web part. The down arrow will appear next to the web part name:



- 3) Click the down arrow against the Web Part's title to open the Web Part drop-down menu:




- 4) Select the needed operation form the drop-down menu;
- 5) Click OK to save changes.

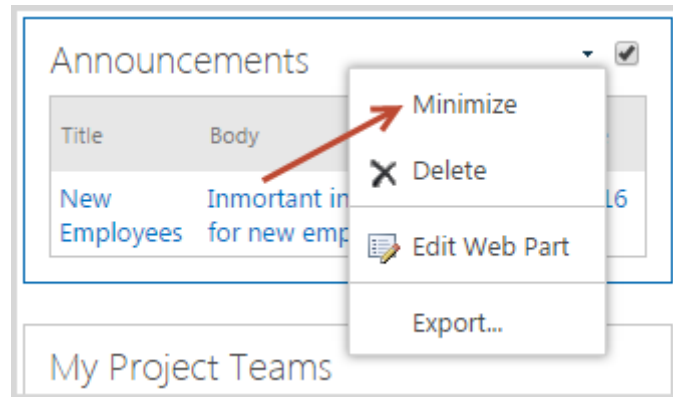
3.2.1 Minimize Web Part

Minimizing the web part allows users to free the space in order to insert other web parts on the host page.

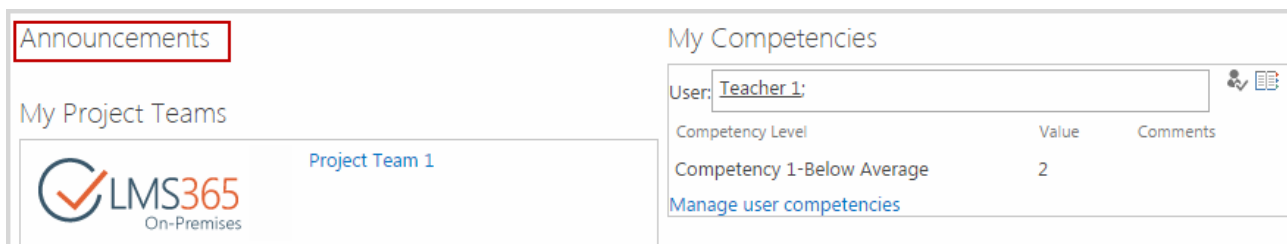
To minimize the chosen web part, follow the steps given below:

- 1) Click the Edit ( EDIT) button on the ribbon to enter the Edit mode;

- 2) Put the cursor arrow against the name of the needed web part. The down arrow will appear by the name of the web part;
- 3) Click the down arrow against the Web Part's title to open the Web Part drop-down menu, then select Minimize:



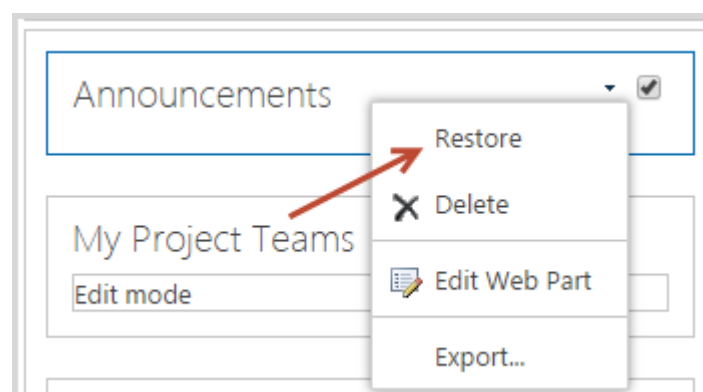
- 4) Once you have done it, the Web Part's layout will be minimized:



3.2.2 Restore Web Part

In order to restore the collapsed web part, follow these steps:


- 1) Click item's drop-down menu by clicking on the arrow next to the name of the web part;
- 2) Click Restore:

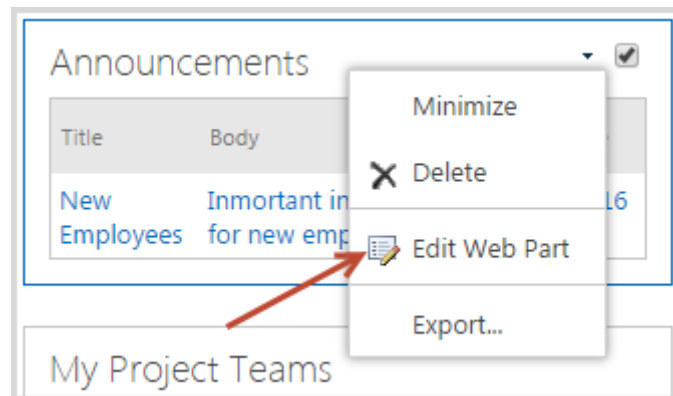


- 3) The web part will be expanded to display its content.

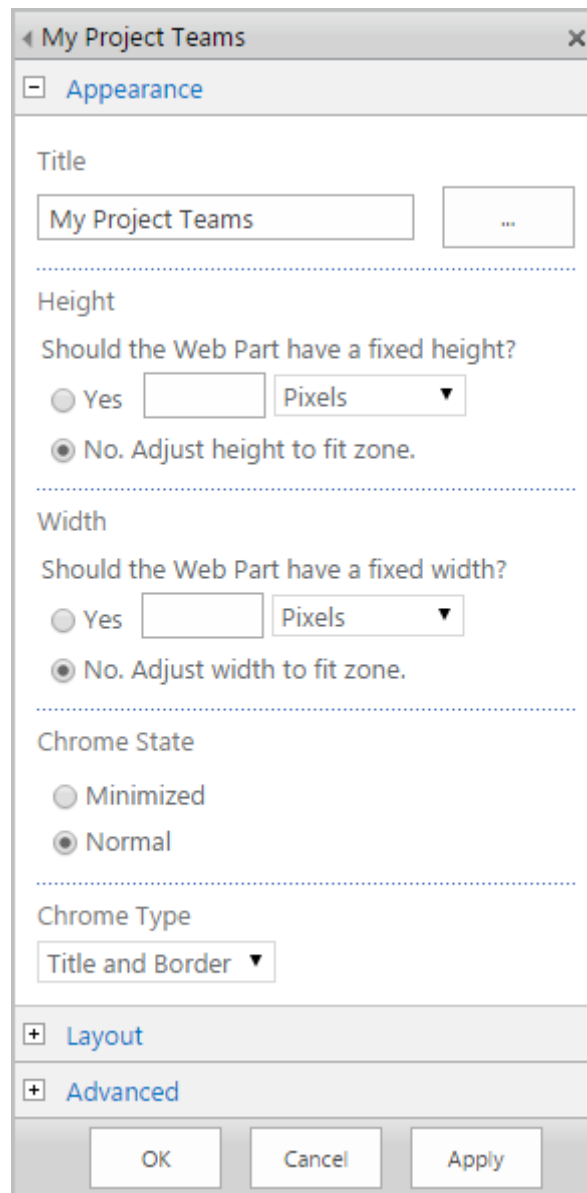
3.2.3 Edit Web Part

To edit the web part, follow the steps given below:

- 1) To enter the Edit mode, click the Edit ( EDIT) button on the ribbon;
- 2) Click the down arrow by the name of the Web Part's title to open the Web Part drop-down menu, then select Edit Web Part:



- 3) Once you have done it, the editor will be opened on the right side of the page:




- 4) Make the necessary changes to the Appearance, Layout and other Advanced settings of the web part;
- 5) Click OK or Apply to save the changes OR Cancel to discard the changes.

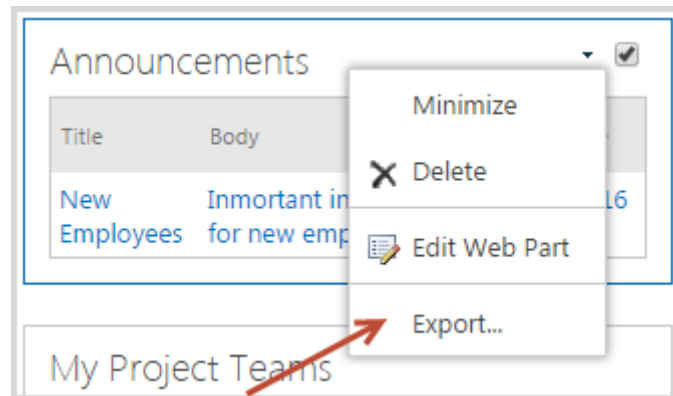
NOTE: The best performance and the maximum functionality of working with SharePoint and integrated the Web Parts can be reached using the Internet Explorer browser.

3.2.4 Export Web Part to PC

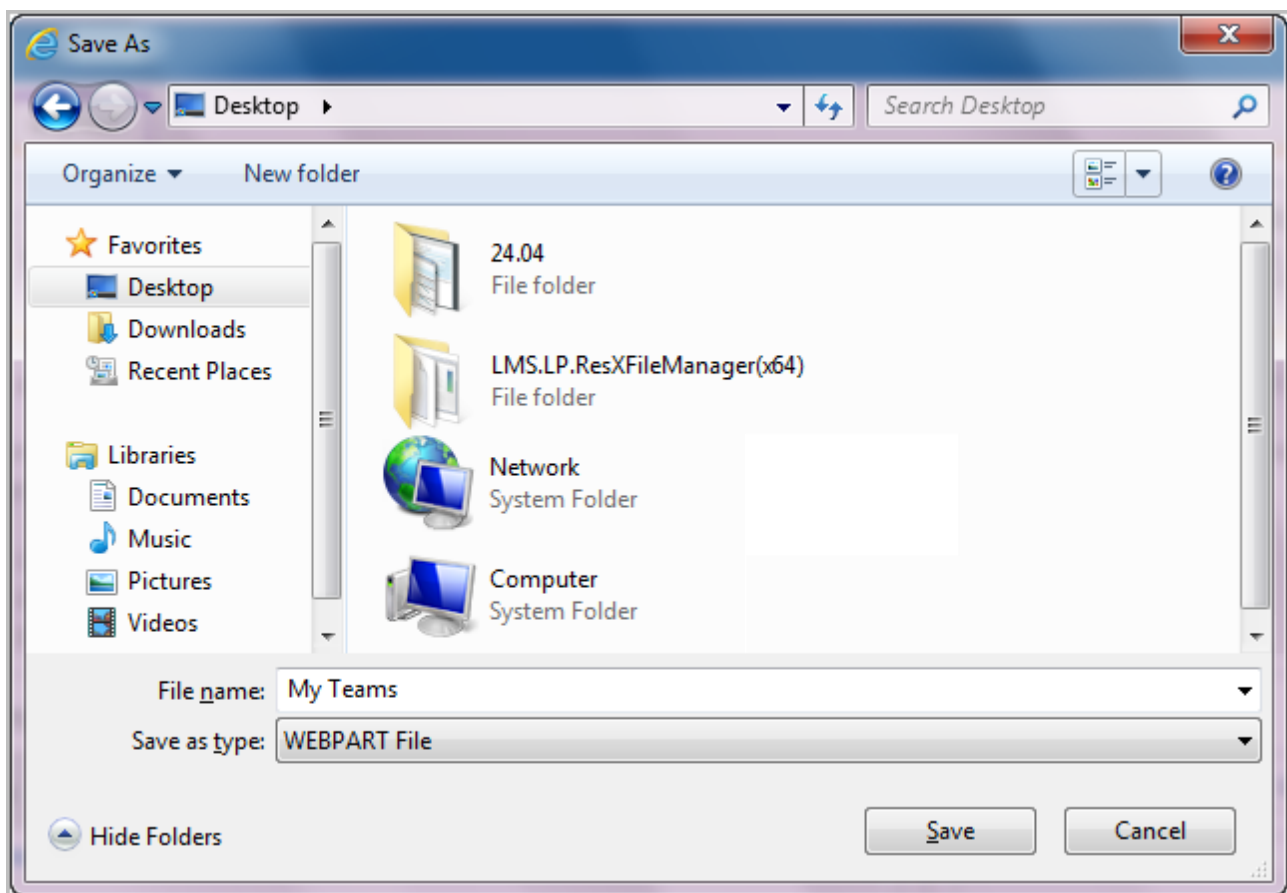
To export the web parts to your personal computer, follow these steps:

- 1) Click the Edit ( EDIT) button on the ribbon to enter the Edit mode;
- 2) Put the cursor arrow on the name of the chosen web part. The down arrow will appear by the name of the web part;

- 3) Click the down arrow by the name of the Web Part's title to open the Web Part drop-down menu, then click Export:




- 4) Once you choose it, Windows dialogue box will offer you to specify the place to save the web part:

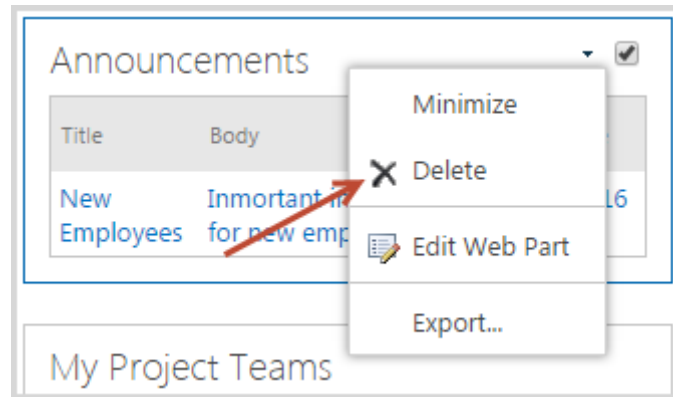


- 5) Click Save to save the web part on your personal computer.

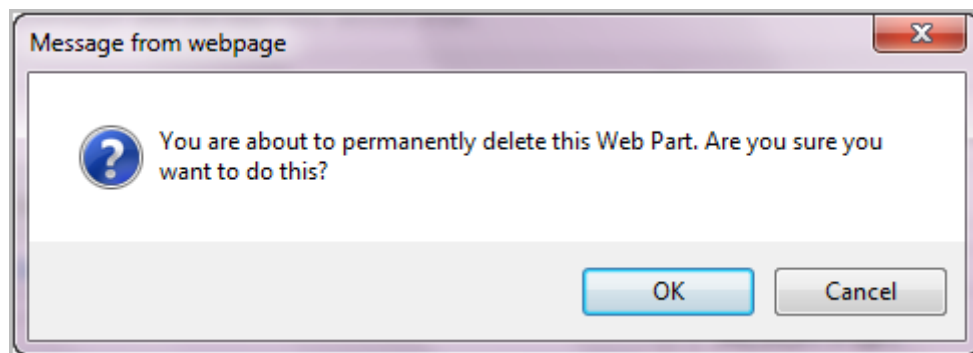
3.2.5 Delete Web Part

To delete a web part, follow the steps given below:

- 1) Click the Edit ( EDIT) button on the ribbon to enter the Edit mode;
- 2) Click the down arrow against the Web Part's title to open the Web Part edit drop-down menu, then select Delete:




The following dialogue box will appear:

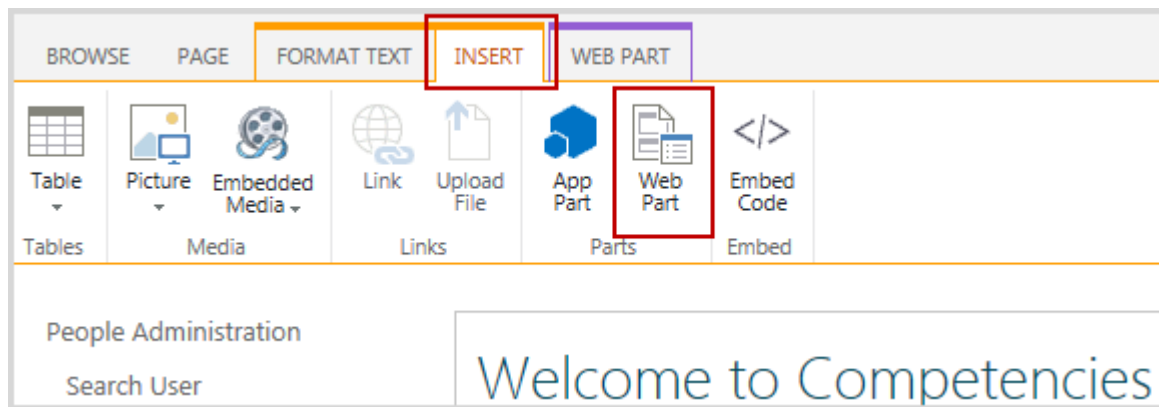


- 3) Click OK to delete the web part permanently, click Cancel to discard the changes.

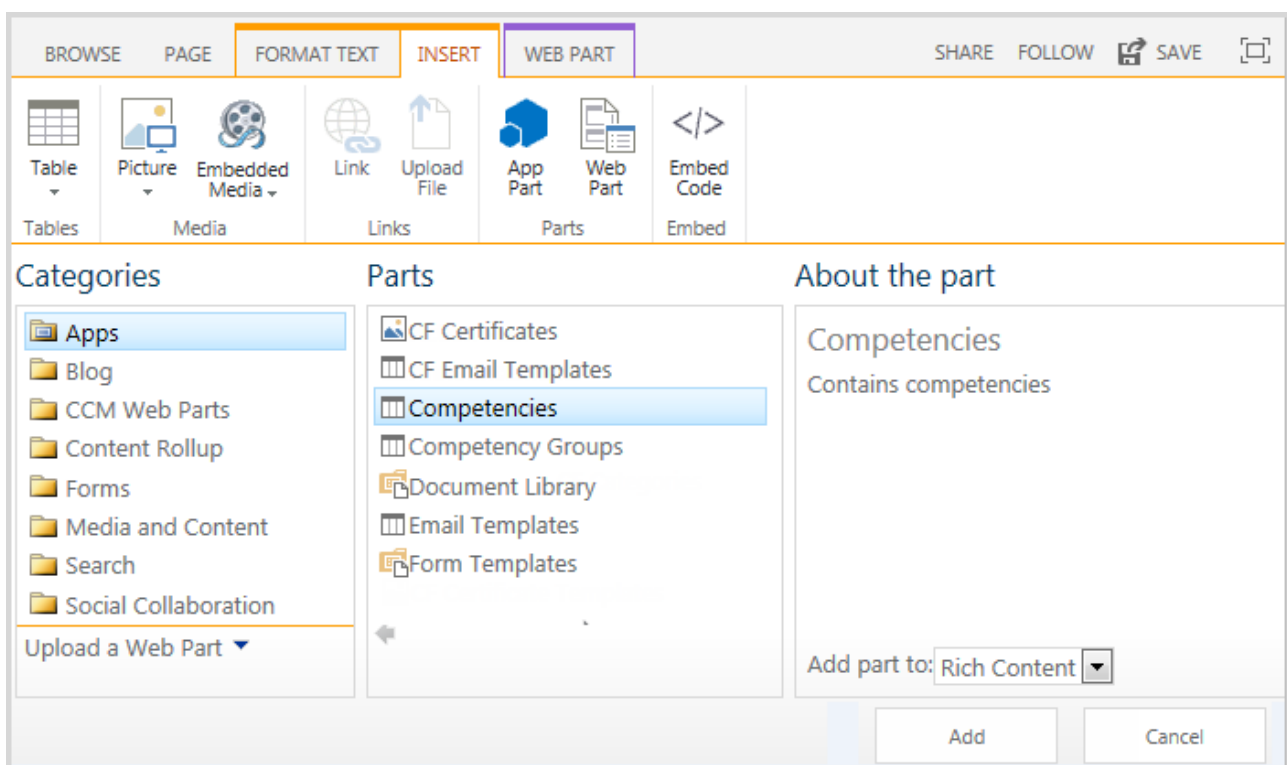
3.2.6 Add a Web Part

In order to facilitate the quick access to the desired SharePoint CCM feature, the user can add a web part to the Host Home page. To add a web part, follow the steps below:

- 1) Click the Edit ( EDIT) button on the ribbon to enter the Edit mode;
- 2) The Editing Tools will appear on the ribbon. Click Insert and click Web Part button:



3) Choose the Category from the Categories => Choose the web part to add:



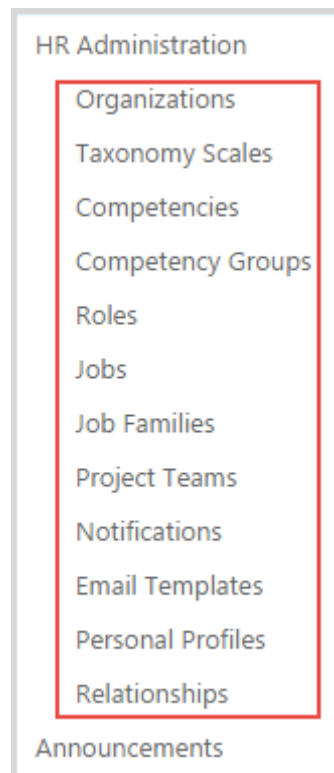
- The Categories section contains categories of Web Parts to you want to add:
- Web Parts section contains Web Parts from the category chosen in the 'Categories' section;
- About the Web Part section contains description of the Web Part chosen in the Web Parts section.

4) Click Add to add the web part to the host page.

4 HR ADMINISTRATION

The HR Administration is defined and managed by the Global Administrator. The Global Administrator defines the nature of a Job and specifies the requirements, such as skills, knowledge and experience necessary to perform it. HR Administration section includes definition of the Competencies, Competency Groups, Taxonomy Scales, Roles, Jobs and Job Families.

On the SharePoint CCM Host Home page the Global Administrator is able to manage the HR Administration items listed on the Quick Launch menu on the left:



The HR Administration function includes defining each individual Role based on the Competency Framework. The Jobs and Job Families are defined next. The Jobs are assigned to one or more Job Families.

The Competency Framework management function includes defining the Competencies and Competency Groups and assigning the Competencies to one or more Competency Groups. For each Competency a Taxonomy Scale is defined with one or more assigned Taxonomy Levels. The Behavioral Indicators are next assigned to each Taxonomy Level.

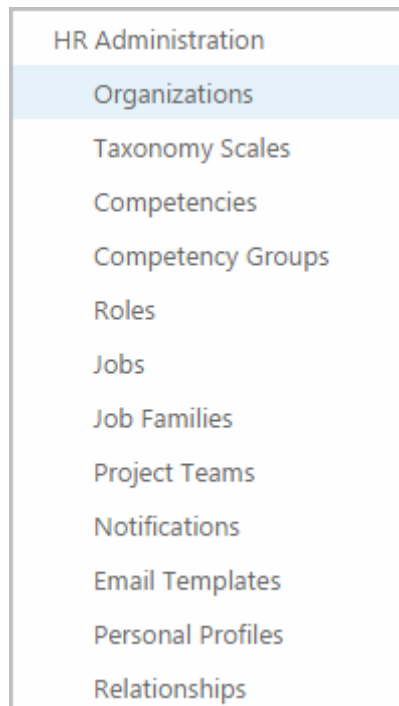
4.1 Organizations

The Global Administrator can add new and manage existing Organizations in the Organizational Structure to ensure smooth cooperation and clear description of responsibilities and roles of the employees within the enterprise.

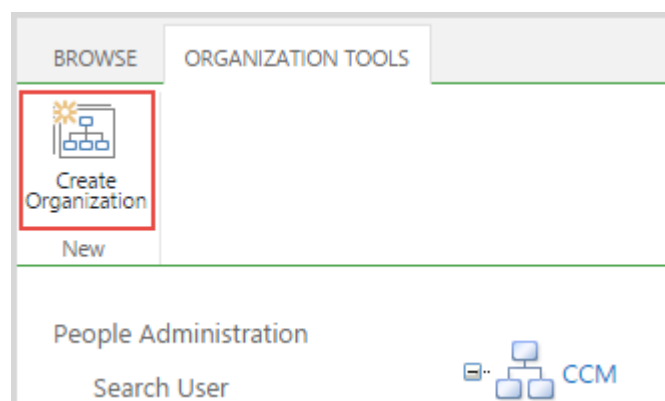
4.1.1 Add Organization

To create a new Organization, follow these steps:

- 1) Choose Organizations from the left side menu on the SharePoint CCM Host Home page:



- 2) In the ribbon menu Organization Tools click Create Organization icon:



- 3) Fill out the form:
 - a. Title – enter the name for this Organization. It will be displayed on each page within the site;

- b. Description – type short description for this Organization;
- c. Web Site Address – enter the URL name for this site. The users will be navigate directly to the Home page of the new Organization by typing this URL address directly into their browser. Keep the url short and easy to remember. Parent Organization – specify Parent organization (if any) for the new Organization;
- d. Additional Info – enter Country/Region, City, State/Province, Address, ZIP/Postal Code, Primary Phone, Fax Number, E-mail Adress and Web Site URL for this Organization);
- e. Language - specify Language for this Organization from drop-down list:

Organizations ▸ Create Organization ⓘ

Type a title and description for your new site. The title will be displayed on each page in the site.

Title and Description

Title:

Description:

Web Site Address

Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.

For example, <http://sp2013-iwa/sites/ccm host/sitename>

URL name:

Parent Organization

Specify parent organization for this organization

Organization: **CCM host** ▾

Additional info

Additional info (address, phone, fax, e-mail and web site)

Country/Region

City

State/Province

Address

ZIP/Postal Code

Primary Phone

Fax Number

E-mail Address

Web Site Url

Language

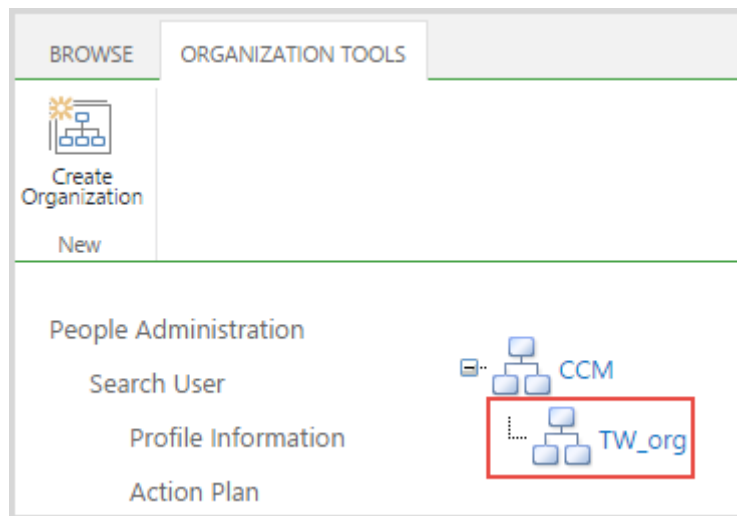
Specify the language for this Web site collection

Select a language:

 ▾

- 4) Click OK to add new Organization to the Organizational Structure of the enterprise OR click Cancel to discard the process.

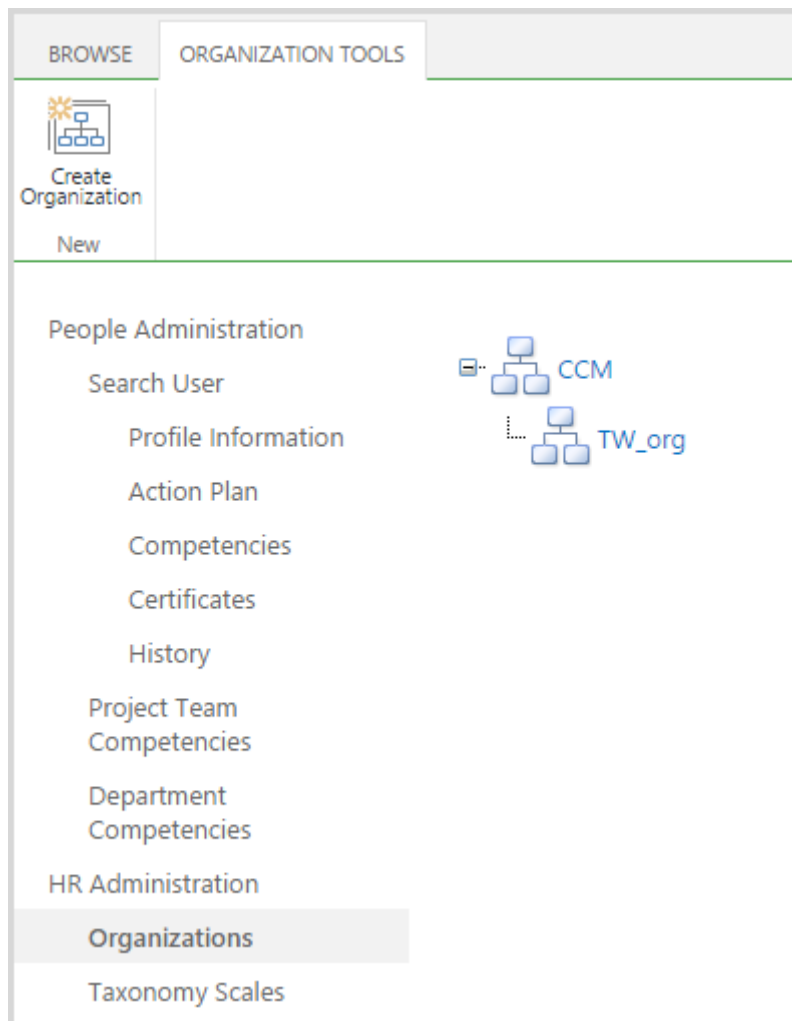
The Global Administrator will be redirected back to the Organizations page, where newly added Organization will be displayed within the Organizational Structure:



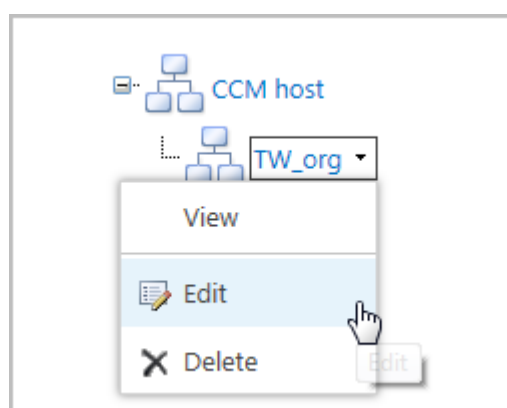
4.1.2 Edit Organization

To modify the information about the Organization, Global Administrator should follow these steps:

- 1) On the SharePoint CCM Host Home page click Organizations link. You will be redirected to the Organizations page, where all the Organizations are displayed in a tree-like structure:



- 2) Click on the drop-down arrow next to the name of the selected Organization in the Organizational tree structure and click Edit:



- 3) Make the changes to the Organization's information in the Edit Organization form: Global Administrator can modify Title, Description, and Additional Info (Country/Region, City, State/Province, Address, ZIP/Postal Code, Primary Phone, Fax Number, E-mail Address and Web Site URL):

Organizations › Edit Organization Details ⓘ

Type a title and description for your new site. The title will be displayed on each page in the site.

Title and Description

Title: TW_org

Description:

Web Site Address

http://sp2013-iwa/sites/ccm host/two

Parent Organization

Specify parent organization for this organization

CCM host

Additional info

Additional info (address, phone, fax, e-mail and web site)

Country/Region

Belarus

City

Minsk

State/Province

Minsk

Address

Kozlov lane, 7

ZIP/Postal Code

222222

Primary Phone

3333333

Fax Number

44444444

E-mail Address

email@gmail.com

Web Site Url

www.url.com

Language

Specify the language for this Web site collection

Select a language:

English ▼

OK Cancel

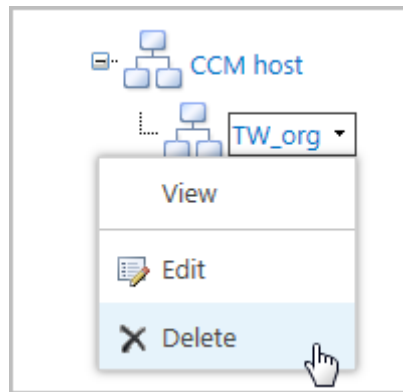
4) Click OK button to save the updates made OR click Cancel to discard the process.

NOTE: The changes made to the Organization's profile become visible in User Profiles.

4.1.3 Delete Organization

To remove the Organization from the Organizational Structure, Global Administrator should follow these steps:

- 1) On the Organizations page, click on the drop-down arrow next to the name of the Organization to be removed and click Delete:



- 2) The Delete Organization form will appear with the Organization's Title, Description and Web Site Address information:

Organizations ▸ Delete Organization ⓘ

Type a title and description for your new site. The title will be displayed on each page in the site.

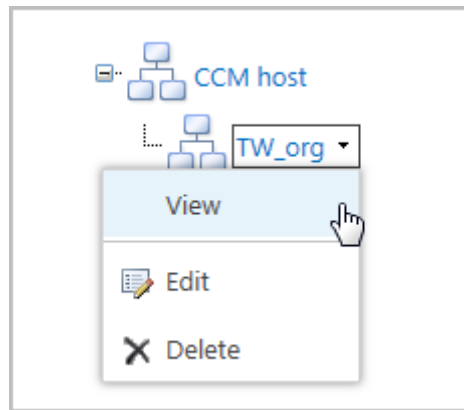
<p>Title and Description</p>	<p>Title: TW_org</p> <p>Description:</p>
<p>Web Site Address</p>	<p>http://sp2013-iwa/sites/ccm host/two</p>

- 3) Click Delete button to remove the Organization from the Organizational Structure. Click Cancel button to discard the changes.

4.1.4 View Organization Details

To view the details about the Organization, follow the steps below:

- 1) From the Organizations page click on the drop-down arrow next to the Organization's name and click View:



- 2) View the detailed information about the selected Organization in the Display Organization form:

Organizations ▸ Display Organization Details ⓘ

Type a title and description for your new site. The title will be displayed on each page in the site.

<p>Title and Description</p>	<p>Title: TW_org</p> <p>Description:</p>
<p>Web Site Address</p>	<p>http://sp2013-iwa/sites/ccm host/two</p>
<p>Parent Organization Specify parent organization for this organization</p>	<p>CCM host</p>
<p>Additional info Additional info (address, phone, fax, e-mail and web site)</p>	<p>Country/Region Belarus</p> <p>City Minsk</p> <p>State/Province Minsk</p> <p>Address Kozlov lane, 7</p> <p>ZIP/Postal Code 222222</p> <p>Primary Phone 3333333</p> <p>Fax Number 44444444</p> <p>E-mail Address email@gmail.com</p> <p>Web Site Url www.url.com</p>

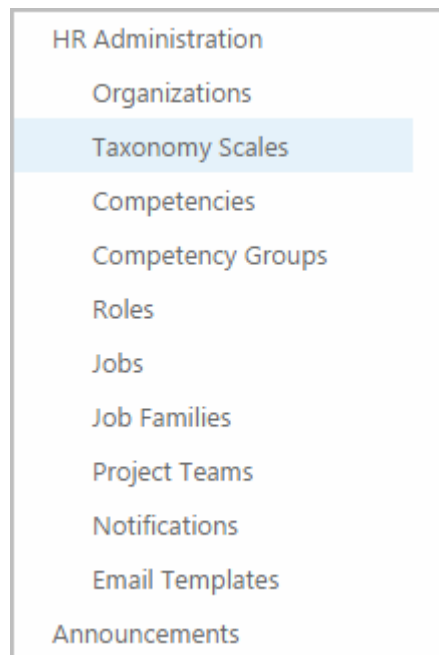
- 3) Click Close to shut down the form.

The system will redirect you back to the Organizations page.

4.2 Taxonomy Scales


Each Competency will have a Taxonomy Scale with the Taxonomy levels that will define the proficiency levels of the employees in the enterprise.

The Taxonomy Scale Templates are stored in the list and can be accessed from the Home page from the Common Tools in the left side menu:



The list with the Taxonomy Scale Templates will be displayed:

BROWSE ITEMS LIST

 Taxonomy Scales ⓘ

People Administration

Search User

- Profile Information
- Action Plan
- Competencies
- Certificates
- History
- Project Team Competencies
- Department Competencies


+ Add New Taxonomy Scale or edit this list

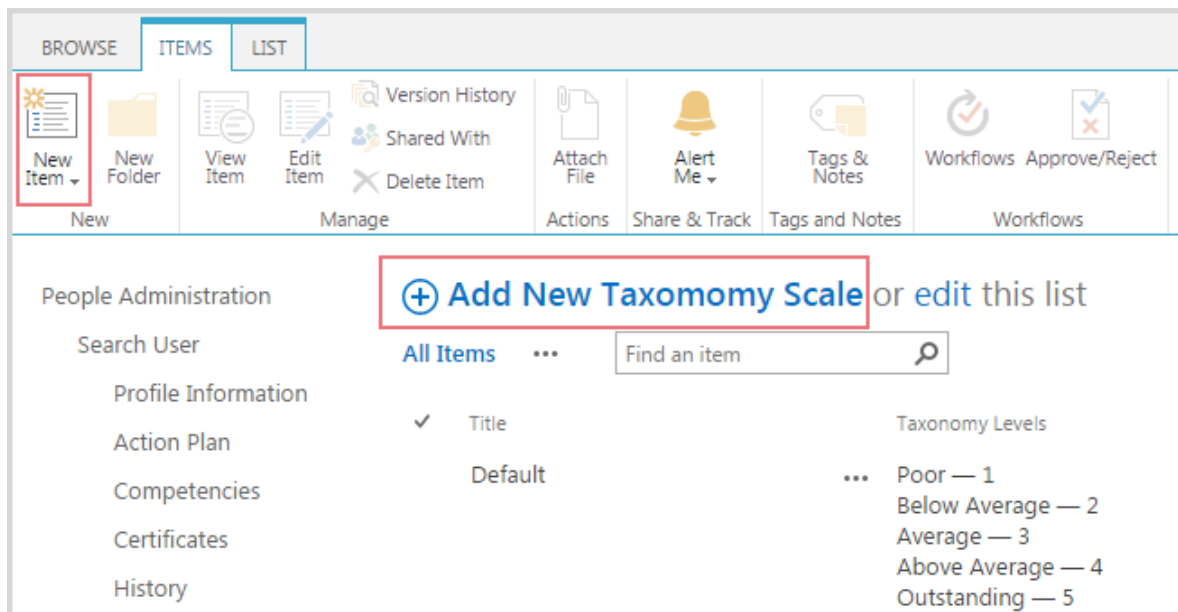
All Items ... Find an item 🔍

✓ Title	Taxonomy Levels
Default	<ul style="list-style-type: none"> Poor — 1 Below Average — 2 Average — 3 Above Average — 4 Outstanding — 5
Starcups Default Taxonomy ✳	<ul style="list-style-type: none"> Master — 3 Experienced — 2 New hire — 1

4.2.1 Add Taxonomy Scale Template

To add new Taxonomy Scale Template, Global Administrator follows the steps below:

- 1) To open Add New Item form use either one of the options below:
 - a. Click Add New Taxonomy Scale button ;
 - OR
 - b. On the ribbon go to Items > New Item:



2) Fill out the Taxonomy Scale Templates – New item form:

- a. Enter the name of the new Taxonomy Scale in the Title field;
- b. Enter optional short description for the new Taxonomy Scale Template in the Description field:

Title *	<input type="text" value="Star cups Default Taxonomy"/>		
Description	<div style="border: 1px solid #ccc; height: 60px;"></div>		
Click for help about adding basic HTML formatting.			
Taxonomy Levels	Title	Value	Operations
	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

- c. Define the Taxonomy Levels for the new Taxonomy Scale Template and click Add button to add the Taxonomy Level and its Value to the Taxonomy Scale:

Taxonomy Levels			Operations	
Title	Value			
New hire	1	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Experienced	2	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
<input type="text" value="Master"/>	<input type="text" value="3"/>	<input type="button" value="Add"/>		
		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	

- Title – enter name for the Taxonomy Level;
- Value – enter the value for the Taxonomy Level.

After the new taxonomy level has been added to the Taxonomy Scale Template, the user will have the option to Edit or Delete it:

Taxonomy Levels *			Operations	
Title	Value			
Excellent	5	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Good	4	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Satisfactory	3	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>		
		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	

- Click Edit button to modify the Taxonomy Level’s metadata:

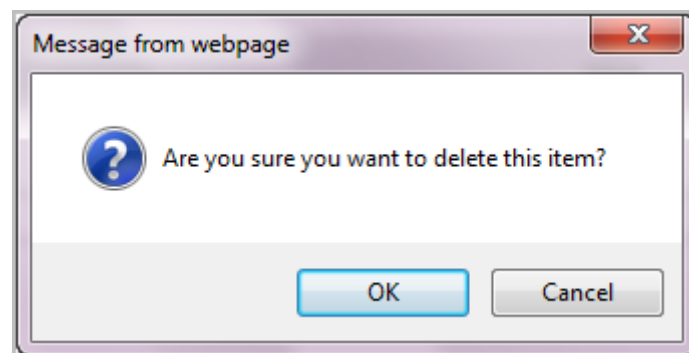
Taxonomy Levels *			Operations	
Title	Value			
<input type="text" value="Very good"/>	<input type="text" value="5"/>	<input type="button" value="Update"/>	<input type="button" value="Cancel"/>	
Good	4	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Satisfactory	3	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	

Make the necessary change to the taxonomy level’s Title and/or Value and click Update button to save the changes or Cancel button to discard the process.

The system will close the edit mode for the Taxonomy Level:

Taxonomy Levels *			Operations	
Title	Value			
Excellent	5	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Good	4	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Satisfactory	3	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>		
		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	

- Click Delete button to remove the Taxonomy Level from the Taxonomy Scale’s Template. The message will appear asking the user to confirm his decision to remove the Taxonomy Level from the Taxonomy Scale Template:



Click OK button to confirm the deletion or Cancel button to discard the process.

- 3) Click Save button to add new Competency Group to the Competency Groups list or click Cancel to discard the process.

The user is redirected back to the Competency Groups list where newly added Competency Group is displayed.

4.2.2 Import Taxonomy Scale

It is possible to import data from .csv file for the Taxonomy Scale item. The process of importing Taxonomy Scale is described below:

Import from .csv is designed for filling taxonomy scales and can be used for bulk import of Taxonomy Scales. To import a taxonomy scale, do the following actions:

- 1) Enter the Taxonomy Scales list and click the Import from CSV button in the List Tools > List in the ribbon menu:

The screenshot shows the LMS365 interface with the 'LIST' tab selected. The 'Import From CSV' button is highlighted with a red box. Below the navigation bar, the 'Add New Taxonomy Scale' section is visible, showing a search bar and a list of taxonomy levels: Poor — 1, Below Average — 2, Average — 3, Above Average — 4, and Outstanding — 5.

2) Select a .csv file from your computer for upload:

The screenshot shows the 'Taxonomy Scale Templates Import' dialog box. It includes a 'Choose File' button and a 'No file chosen' message. The dialog also contains 'OK' and 'Cancel' buttons. The background shows the 'Import Taxonomy Scale Templates' section with a link to 'Sample Import File.csv'.

NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data. Required columns can be set in Taxonomy Scales > List > List Settings:

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Modified	Date and Time	
Created	Date and Time	
Description	Multiple lines of text	
Taxonomy Levels	Taxonomy Levels	
Is Default	Yes/No	
Created By	Person or Group	
Modified By	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Column ordering](#)
- [Indexed columns](#)

All required columns are marked in the 'Required' column. To set a column as required/not required, click on the name of the needed column and select the needed option in the Additional Column Settings section:

Settings ▸ Edit Column ⓘ

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:
Single line of text

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

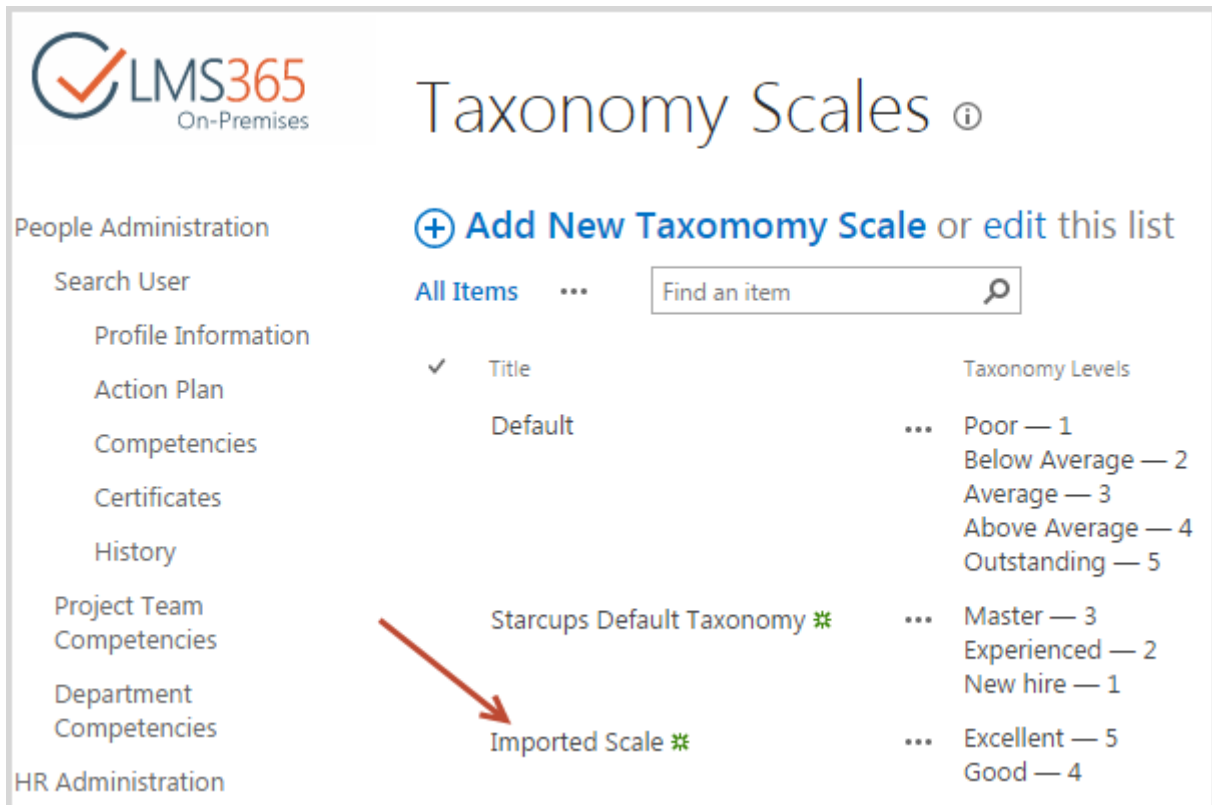
Enforce unique values:
 Yes No

Maximum number of characters:

Default value:
 Text Calculated Value

[Column Validation](#)

3) Click OK to confirm import. The imported Taxonomy Scales will be added to the list:



NOTE: If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Taxonomy Scale with incorrect data will be not uploaded and error will be displayed at the end of action.
 If imported Taxonomy Scale duplicates title of already existing one, a warning about item with duplicating title will be displayed.

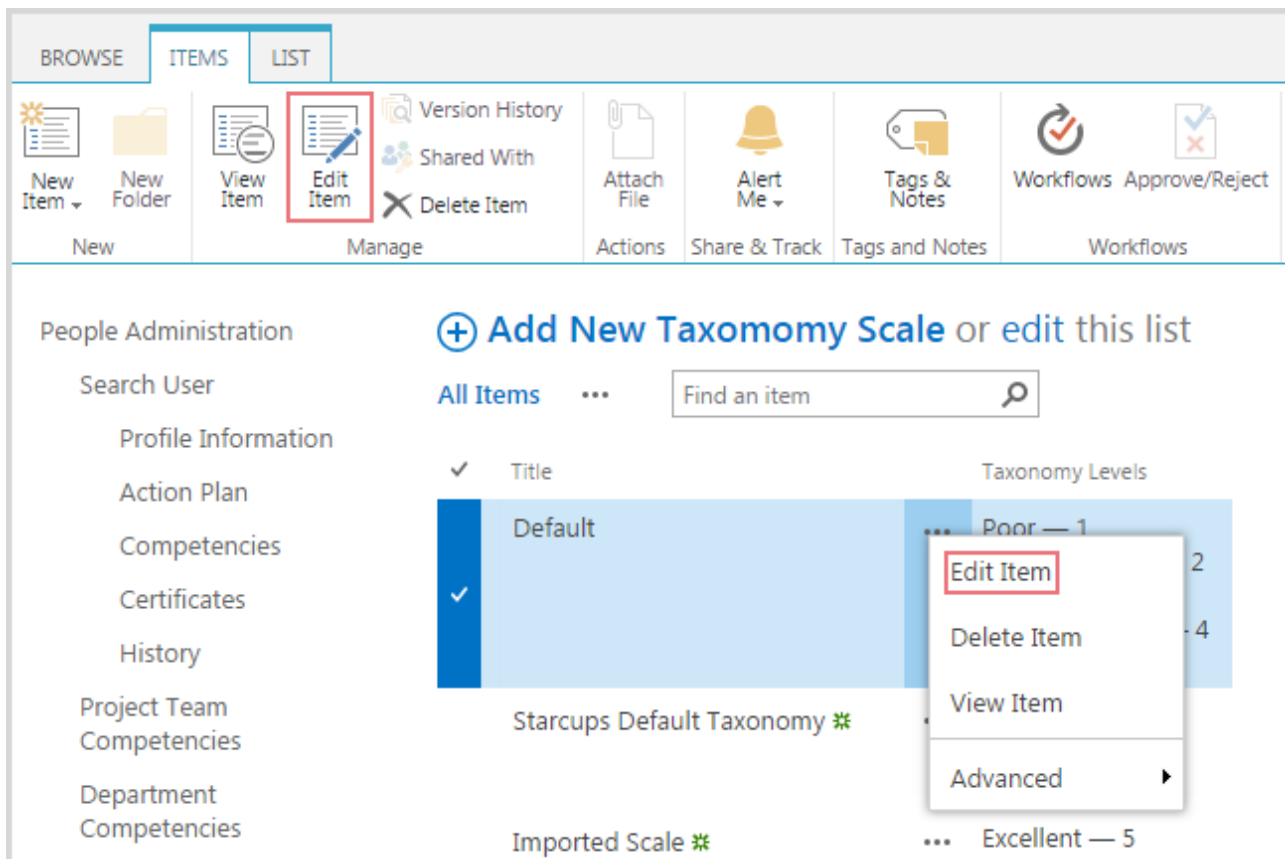
4.2.3 Edit Taxonomy Scale Template

To edit the Taxonomy Scale Template, the Global Administrator should follow the steps below:

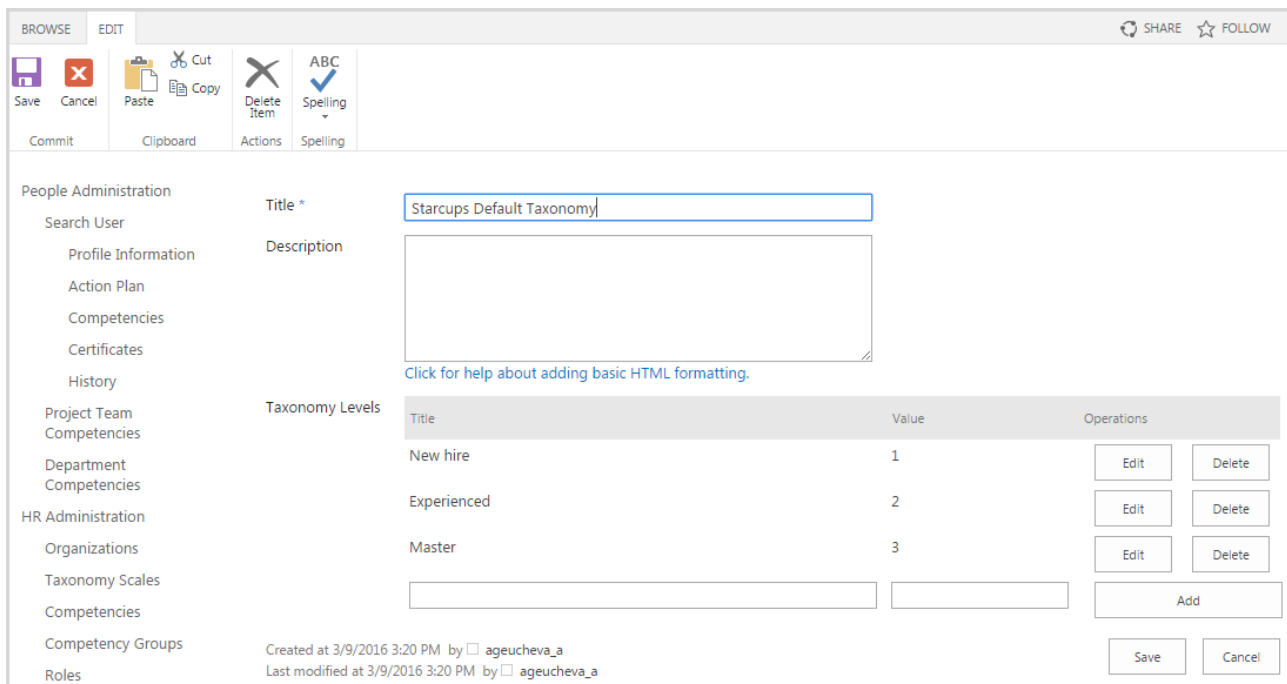
- 1) Open the Edit form via one of the ways described below:
 - a. Click on the Taxonomy Scale Template's Title in the Taxonomy Scale Templates list to select it and from the ribbon choose Edit Item in the Items tab;

OR

- b. From the drop-down action list next to the Taxonomy Scale Template's Title select Edit Item action:



- 2) Make the necessary changes to the Taxonomy Scale Template's metadata in Taxonomy Scale Template - Edit form:
- Title – change the name of the Taxonomy Scale Template;
 - Description – edit the description field for the Taxonomy Scale Template;
 - Taxonomy Scale Levels – for editing Taxonomy Levels for the Taxonomy Scale Template refer to the see Chapter 4.2.1 [Add Taxonomy Template](#) of this document:



People Administration

Search User

Profile Information

Action Plan

Competencies

Certificates

History

Project Team

Competencies

Department

Competencies

HR Administration

Organizations

Taxonomy Scales

Competencies

Competency Groups

Roles

Title *

Starcups Default Taxonomy

Description

Click for help about adding basic HTML formatting.

Title	Value	Operations
New hire	1	Edit Delete
Experienced	2	Edit Delete
Master	3	Edit Delete

Created at 3/9/2016 3:20 PM by ageucheveva_a
Last modified at 3/9/2016 3:20 PM by ageucheveva_a

Save Cancel

3) Click Save button to confirm the changes made or click Cancel button to discard the process.

NOTE: If User deletes a Taxonomy Level from the Taxonomy Scale which had already been assigned to one or more Employees, they will be automatically assigned with the next inferior level of the scale.

4.2.4 View Taxonomy Scale template details

To see the details about the Taxonomy Scale Template, the user follows the steps below:

- 1) Open the Taxonomy Scale Template details form via one of the options described below:
 - a. From the drop-down action list next to the Taxonomy Scale Template's Title select View Item action;

OR

- b. Click on the Taxonomy Scale Template in the Competency Groups list to select it and from the ribbon choose View Item in the Items tab:

BROWSE ITEMS LIST

New Item New Folder View Item Edit Item Version History Shared With Attach File Alert Me Tags & Notes Workflows Approve/Reject Delete Item

New Manage Actions Share & Track Tags and Notes Workflows

People Administration

Search User

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Project Team Competencies

Department Competencies

+ Add New Taxonomy Scale or edit this list

All Items ... Find an item

✓	Title	Taxonomy Levels
✓	Default	Poor — 1 2 4
	Starcups Default Taxonomy ✱	
	Imported Scale ✱	... Excellent — 5

Context menu for 'Default':

- Edit Item
- Delete Item
- View Item**
- Advanced

2) View the metadata available for the selected Taxonomy Scale Template:

BROWSE VIEW

Edit Item Version History Alert Me Shared With Workflows Delete Item

Manage Actions

People Administration

Search User

Profile Information

Action Plan

Competencies

Certificates

History

Title: Starcups Default Taxonomy

Description:

Taxonomy Levels: Master — 3
Experienced — 2
New hire — 1

Created at 3/9/2016 3:20 PM by ageucheva_a

Last modified at 3/9/2016 3:20 PM by ageucheva_a

Close

3) Click Close button to return to the Competency Groups list.

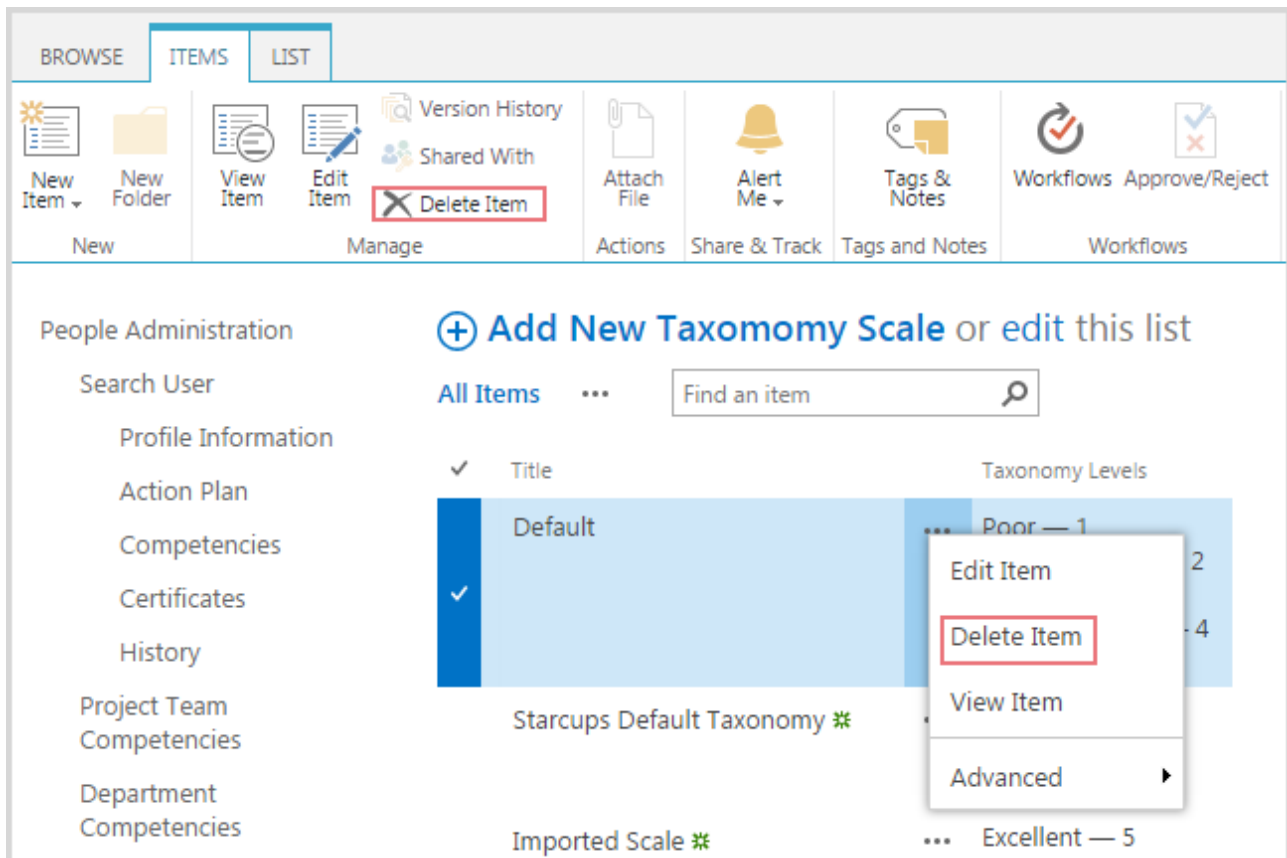
4.2.5 Delete Taxonomy Scale Template

In order to delete the Taxonomy Scale Template, the Global Administrator has to perform the following steps:

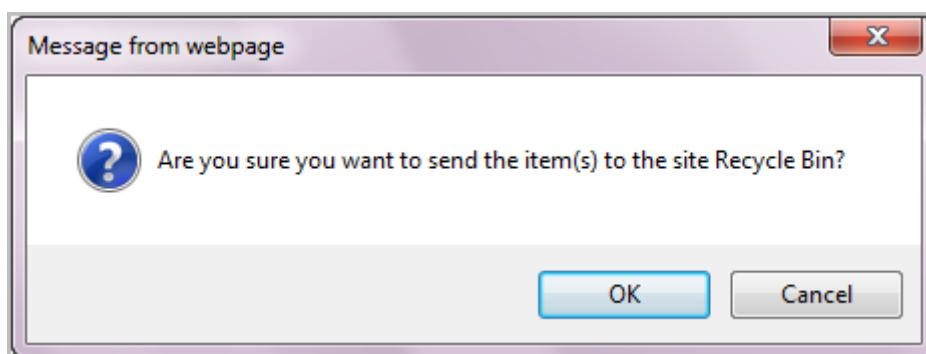
- 1) Click on the Taxonomy Scale Template in the Taxonomy Scale Templates list to select it and from the ribbon choose Delete Item in the Items tab;

OR

- 2) From the drop-down action list next to the Taxonomy Scale Template's Title select Delete Item action:



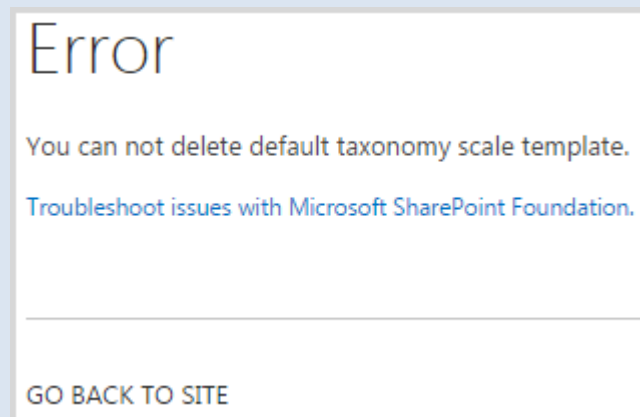
The system will display the message asking to confirm the decision to permanently remove the Taxonomy Scale Template:



- 3) Click OK button to confirm the decision to remove the selected Taxonomy Scale Template or click Cancel to discard the process.

The user is redirected back to the Competency Groups list where removed item is no longer displayed.

NOTE: The default Taxonomy Scale from the Taxonomy Scales dictionary cannot be deleted. The system displays the error message:



Taxonomy Scale assigned to at least one Competency cannot be deleted.

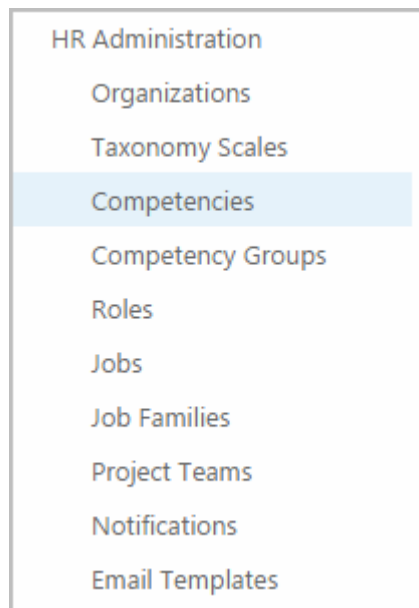
4.3 Competencies

The Global Administrator defines the Competencies for an Organization and has the full management control to add, edit, and delete the Competencies.

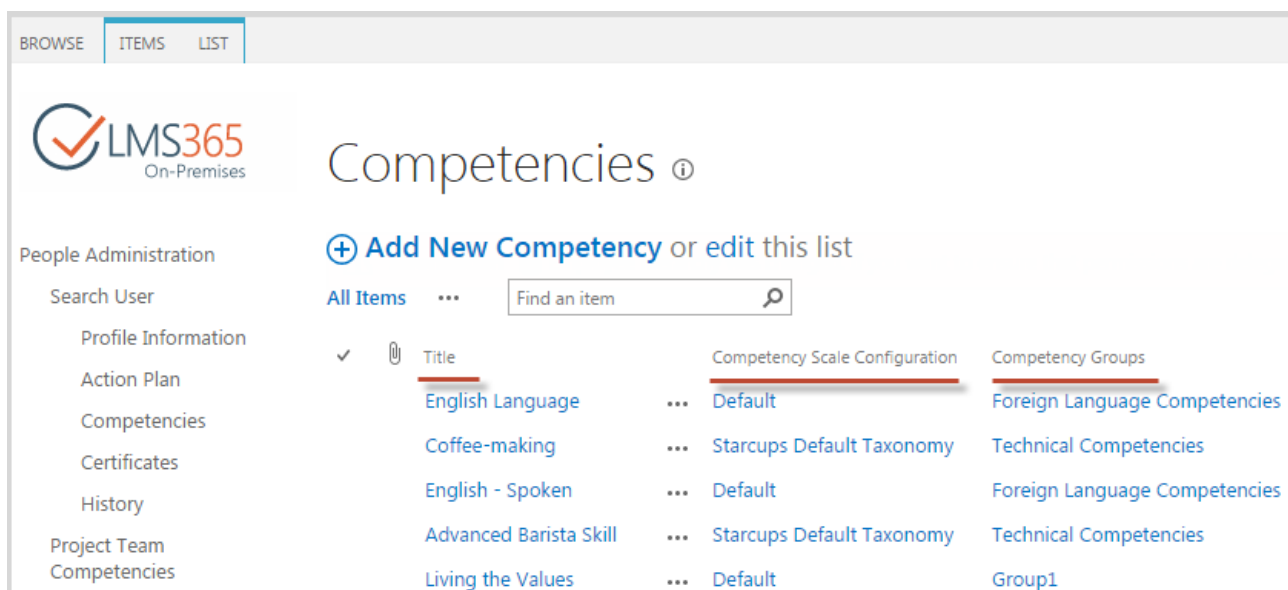
4.3.1 View Competencies list

To view the list of Competencies, the User should follow the steps below:

- 1) Go to the Organization Home Page;
- 2) Click Competencies in the left side menu in Common Tools:




The system will display the list of all Competencies within the Organization, sorted by Title, Competency Scale Configuration and Competency Groups categories for each Competency:

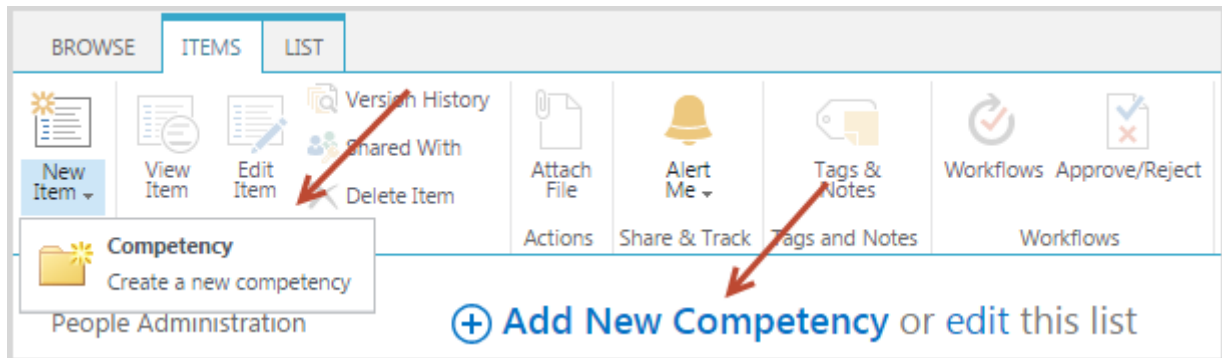


The Global Administrator is able to manage the Competencies from the Competencies List by adding new Competencies, updating or deleting the Competencies that are already in the list.

4.3.2 Add Competency

Adding a new competency includes several steps. You need the Global Administrator permissions to do it. In the HR Administration section, go to Competencies menu. The competencies list will appear:

- 1) On the ribbon menu choose Items and click New Item > Competency to create a new Competency OR click Add New Competency button :



- 2) The system will open the Competency – New Item form:

Competencies

Title *

Description






Competency Groups

Personal Competencies
 Technical Competencies

Foreign Languages

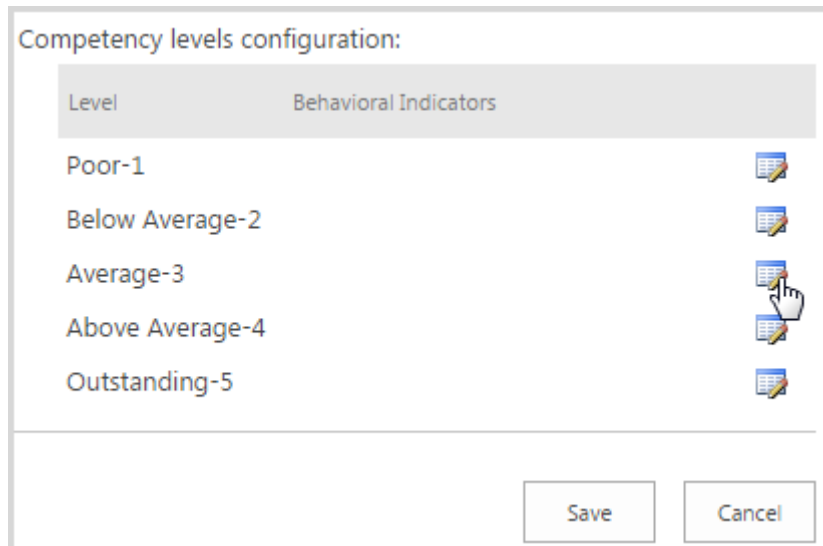
Competency Scale Configuration * Scale Template:

Competency levels configuration:

Level	Behavioral Indicators
Poor-1	
Below Average-2	
Average-3	
Above Average-4	
Outstanding-5	

- 3) Enter the name and, optionally, description for the new Competency:
 - Title – the Name for the new Competency;
 - Description – the short description of the new Competency;
- 4) Select (optionally) one or more Competency Groups for the new Competency:
 - Competency Group – Competency group(s) the new Competency will belong to;
- 5) Specify the Competency Scale for the new Competency:
 - Competency Scale Configuration – Taxonomy Scale with Levels and Behavioral Indicators to be assigned to the new Competency;

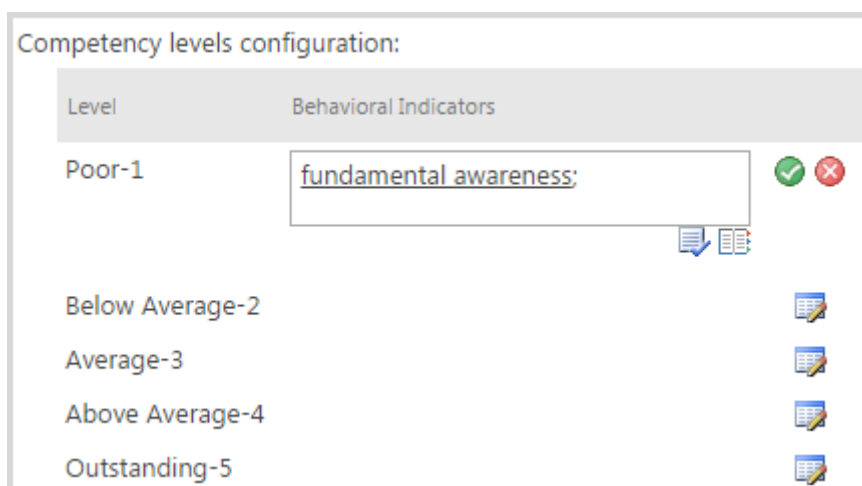
- From the drop-down list, set Scale Template (choose between Default and Competencies Proficiency Scale).
The Competency Levels Configuration will adjust automatically, based on the selected Scale Template;
- Click configuration button (📝) to edit the current Level:



Level	Behavioral Indicators
Poor-1	📝
Below Average-2	📝
Average-3	📝
Above Average-4	📝
Outstanding-5	📝

Save Cancel

The Configuration form will appear. Here you can pick Behavioral Indicators to be attached to the current Competency level:








Level	Behavioral Indicators
Poor-1	<input type="text" value="fundamental awareness:"/> ✓ ✗ 📝 📝
Below Average-2	📝
Average-3	📝
Above Average-4	📝
Outstanding-5	📝

- Click the Browse (📝) icon to pick one or more Behavioral Indicators;
- Click Check Names (📝) icon to check, whether the name is correct and can be added;

- Click (✓) icon to save the added Behavioral Indicators to the Level OR clicks (✗) icon to discard the changes:

Competency levels configuration:

Level	Behavioral Indicators	
Poor-1	fundamental awareness	
Below Average-2		
Average-3		
Above Average-4		
Outstanding-5		

- Complete the procedure for each Competency Level in the selected Scale.

NOTE: Behavioral Indicators are displayed in Competency Picker Dialog when assigning new competencies and when editing competencies as well as in the drop-down list when changing the level of the competency (point at the needed competency level to see a tooltip):

Personal Competencies - English-Spoken-Above Average

EDIT

Save Cancel Paste Cut Copy Delete Item Spelling

Commit Clipboard Actions Spelling


Competency * English-Spoken-Above Average (4) Behavioral Indicators: Knowledge of present and past tenses

Comments

Click for help about adding basic HTML formatting.
No existing entries.

Version: 1.0
Created at 4/20/2016 9:00 PM by System Account
Last modified at 4/21/2016 12:23 PM by System Account

Save Cancel



Personal Competencies - English-Spoken-Above Average

EDIT

Save Cancel Paste Copy Cut Delete Item Spelling

Competency * English-Spoken-Above Average (4) English-Spoken-Poor (1) English-Spoken-Below Average (2) English-Spoken-Average (3) English-Spoken-Above Average (4) English-Spoken-Outstanding (5)

Comments perfect written and oral skills

Click for help about adding basic HTML formatting.
No existing entries.

Version: 1.0
Created at 4/20/2016 9:00 PM by System Account
Last modified at 4/21/2016 12:23 PM by System Account

Save Cancel

Behavioral Indicators are also displayed on Competencies web part (point at the needed competency level to see a tooltip):

Competencies

Select User Learner 2

Held	Required	Revoked	All
Title	User Level	Required	Suggested
Foreign Language Competencies			
English-Spoken	1 2 3 4 5	3	Not Present
Ungrouped			
Coffee-making	1 2 3		

User level value: 5
User level: **Outstanding**
Behavioral indicators: perfect written and oral skills
Outstanding value from scale is 5

6) Click Save button to add the current Competency to the Competencies list OR click Cancel button to discard the changes.

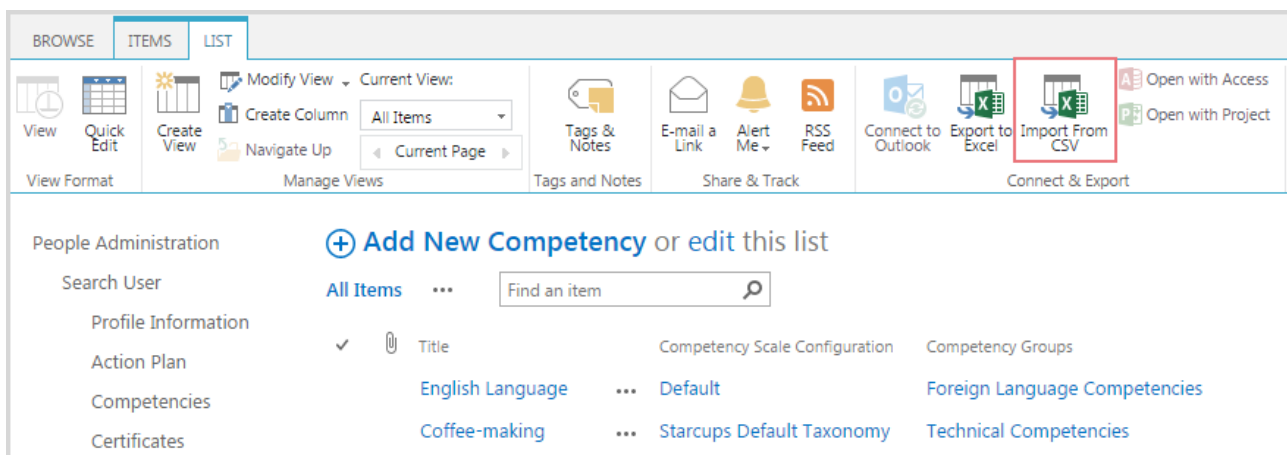
You will be redirected to the Competencies list with new Competency added to it.

4.3.3 Import Competency

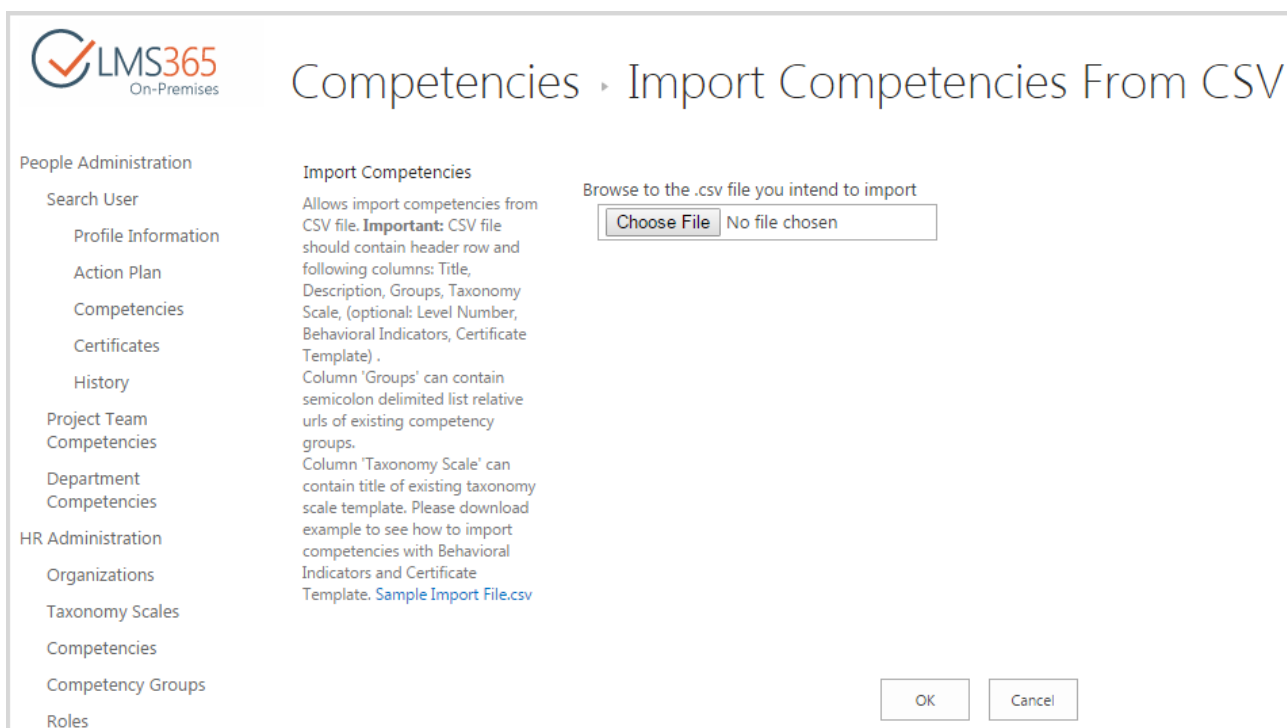
It is possible to import data from .csv file for the Competency item. The process of importing Competency is described below:

Import from .csv is designed for filling competencies and can be used for bulk import of Competencies. To import a competency, do the following actions:

- 1) Enter the Competencies list and click the Import from CSV button in the List Tools > List in the ribbon menu:



- 2) Select a .csv file from your computer for upload:



NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

Required columns can be set in Competencies > List > List Settings:

Column (click to edit)	Type	Used in
Competency Groups	Lookup	Competency
Competency Scale Configuration	Taxonomy scale	Competency
Created	Date and Time	
Description	Multiple lines of text	Competency
Modified	Date and Time	
Title	Single line of text	Competency Level, Competency
Created By	Person or Group	
Modified By	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Indexed columns](#)

All required columns are marked in the 'Required' column. To set a column as required/not required, click on the name of the needed column and select the needed option in the Additional Column Settings section:

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes No

Enforce unique values:

Yes No

Maximum number of characters:

255

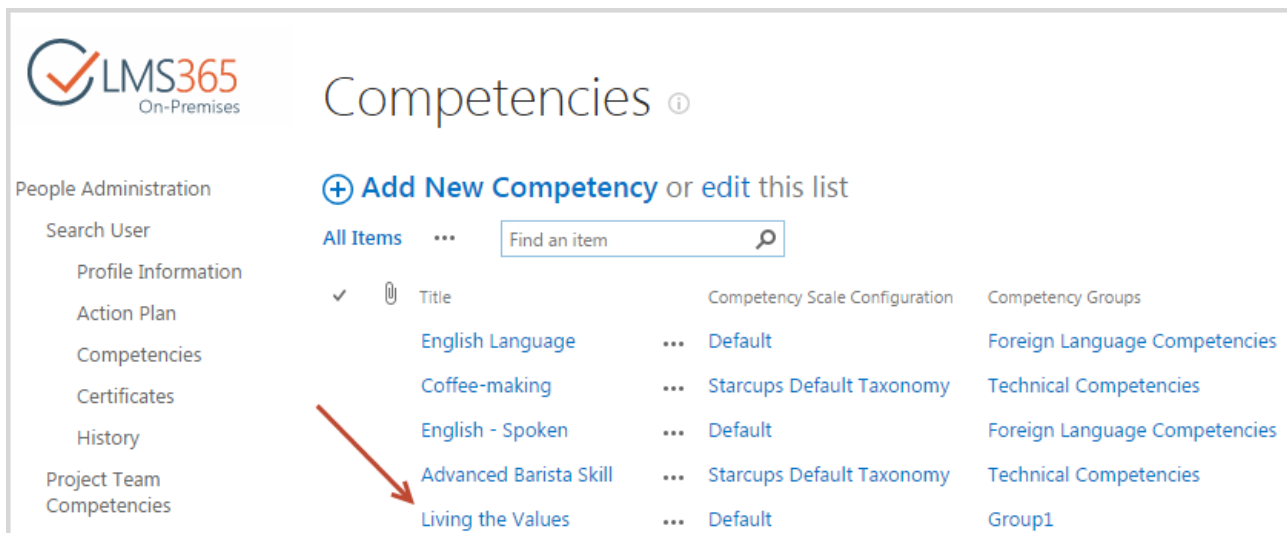
Default value:

Text Calculated Value

Add to all content types

Add to default view

3) Click OK to confirm import. The imported Competencies will be added to the list:



People Administration

Search User

Profile Information

Action Plan

Competencies

Certificates

History

Project Team

Competencies

Competencies ?

[+ Add New Competency](#) or edit this list

All Items ... 🔍

<input checked="" type="checkbox"/>		Title	Competency Scale Configuration	Competency Groups
		English Language	Default	Foreign Language Competencies
		Coffee-making	Starbucks Default Taxonomy	Technical Competencies
		English - Spoken	Default	Foreign Language Competencies
		Advanced Barista Skill	Starbucks Default Taxonomy	Technical Competencies
		Living the Values	Default	Group1

NOTE: If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Competency with incorrect data will be not uploaded and error will be displayed at the end of action.

NOTE: If imported Competency duplicates title of already existing one, a warning about item with duplicating title will be displayed. After synchronizing profile with this competency will have status "Incomplete", as it is impossible to detect, which competency is specified in the profile.

4.3.4 Edit Competency

To edit a Competency, follow these steps:

- 1) Open the Competencies menu;
- 2) Check the box against the Competency you want to edit and click Edit Item on the ribbon menu section:

The screenshot displays the LMS365 user interface. At the top, there are navigation tabs for 'BROWSE', 'ITEMS', and 'LIST'. Below these are several action buttons: 'New Item', 'View Item', 'Edit Item' (highlighted with a red box), 'Delete Item', 'Attach File', 'Alert Me', 'Tags & Notes', 'Workflows', and 'Approve/Reject'. The main content area shows a list of competencies under the heading 'Add New Competency or edit this list'. The list includes items like 'Coffee-making', 'Advanced Barista Skill', 'Living the Values', 'English-Spoken', and 'Business Conduct'. A context menu is open over the 'Coffee-making' item, with 'Edit Item' highlighted in a red box. Other options in the menu include 'Delete Item', 'View Item', and 'Advanced'.

3) The Project Manager (edit form) window will appear:

BROWSE
EDIT
SHARE

Save
 Cancel

Paste
 Cut
 Copy

Delete Item
 Spelling

People Administration

- Search User
- Profile Information
- Action Plan
- Competencies
- Certificates
- History
- Project Team
- Competencies
- Department
- Competencies

HR Administration

- Organizations
- Taxonomy Scales
- Competencies
- Competency Groups
- Roles
- Jobs
- Job Families
- Project Teams
- Notifications
- Email Templates
- Personal Profiles

Title *

Description

Competency Groups

Competency Scale Configuration * Scale Template:

Competency levels configuration:

Foreign Language Comp Group 1

Add >
< Remove

Technical Competencies

Starcups Default Taxonomy ▼

Level	Certificate Template	Behavioral Indicators
New Hire-1		
Experienced-2		
Master-3		

Created at 3/30/2016 7:06 PM by ageucheva_a

Last modified at 3/30/2016 7:06 PM by ageucheva_a


Save
Cancel

- 4) Fill in all the necessary information;
- 5) Click Save button to save the changes OR click Cancel button to discard the changes;
- 6) You will be redirected to the Competencies list.

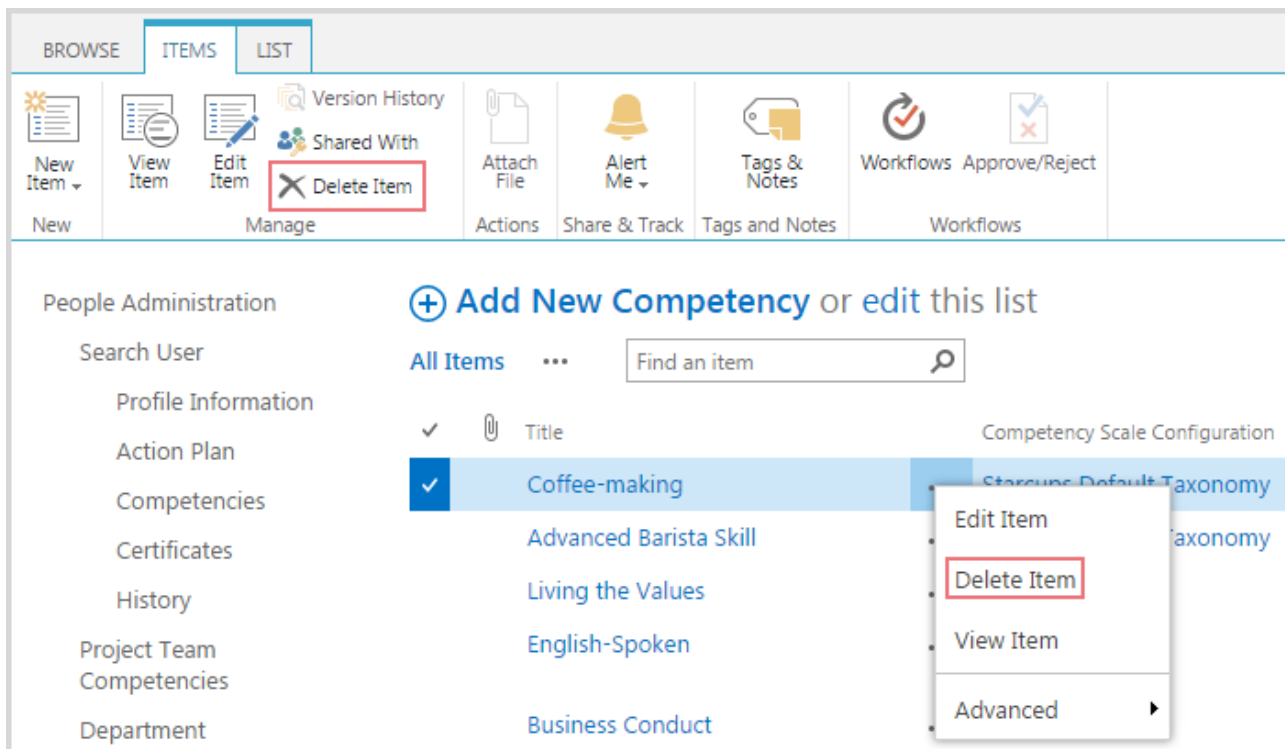
4.3.5 Delete Competency

To remove the Competency from the Competencies list, follow these steps:

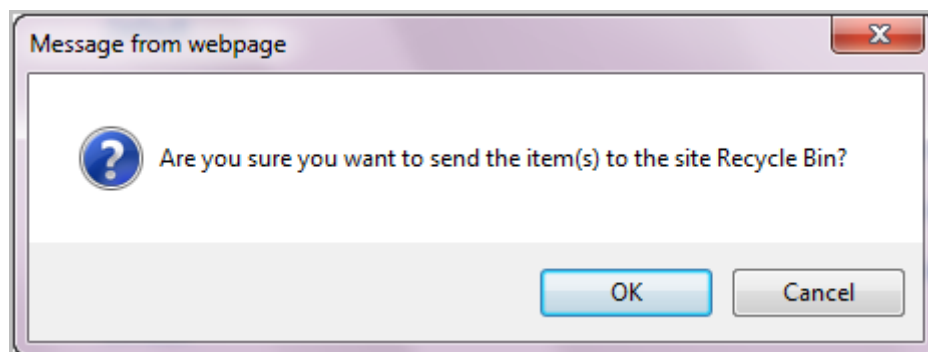
- 1) Open the Competencies menu;
- 2) Check the box against the Competency you want to remove and click Delete Item on the ribbon menu section:



62



3) You will be asked to confirm the decision to permanently remove the selected Competency:



4) Click OK button to confirm the changes OR Cancel button to discard the changes;

5) You will be redirected to the Competencies list.

NOTE: When Competency is removed from the Competencies list:

- It is also removed from "Competencies" field of all Competency Groups that it belonged to.
- It is also removed from the "Competencies" field of all Roles it belonged to.
- Competency is not removed from the Personal Competencies of Employees to whom it has been previously assigned.

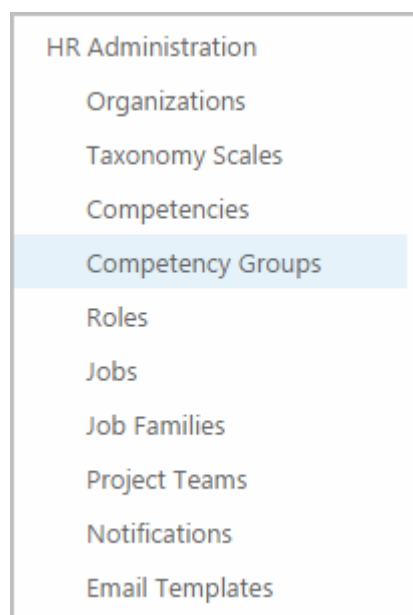
4.4 Competency Groups

The Global Administrator defines the set of Competency Groups to which the Competencies will be assigned.

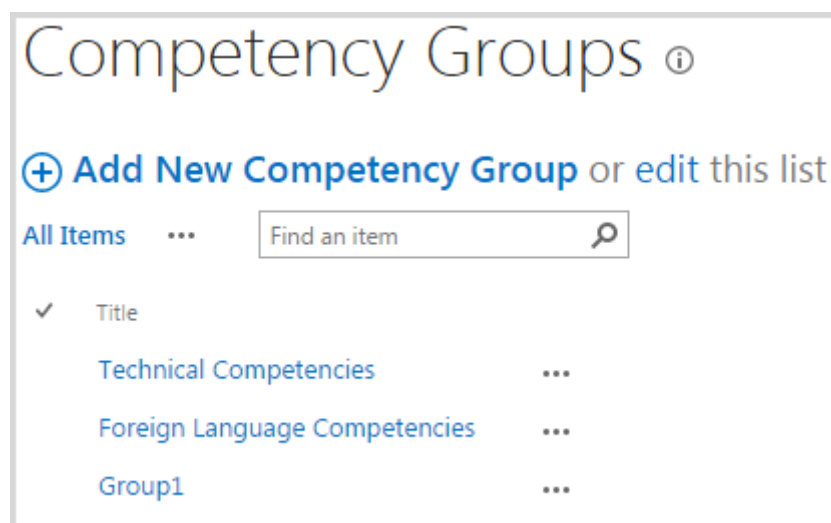
Competency Groups are stored in the Competency Groups List that can be accessed from the Common Tools in the left side menu on the Home page. Global Administrator has the full control to add, edit, and delete the Competency Groups.

To view the list of all Competency Groups, follow the steps below:

- 1) Click on Competency Groups link in the left side menu in Common Tools on the Home page:



- 2) You will be redirected to the Competency Groups list:



4.4.1 Add Competency Group

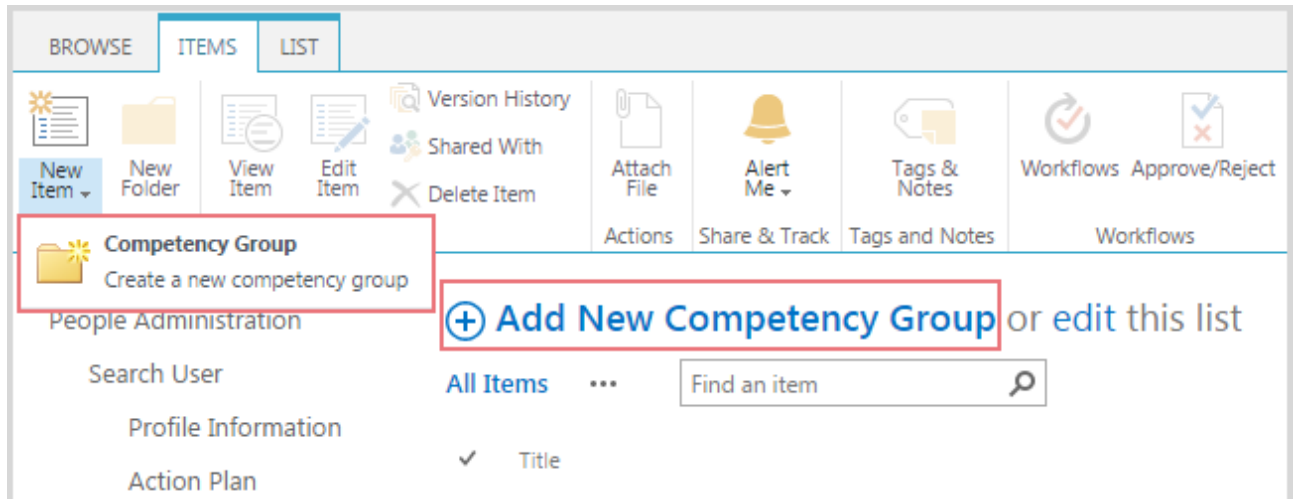
To add a new Competence Group, follow these steps:

1) To open Add New Item form use either one of the options below:

a. Click Add New Competency Group button  ;

OR

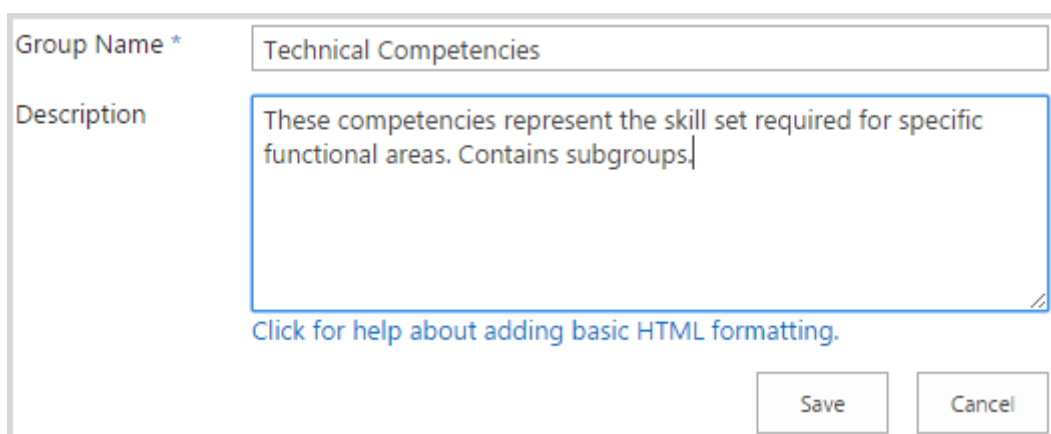
b. On the ribbon go to Items > New Item and click Competency Group from the drop-down:



2) Fill out the Competency Group – New item form:

a. Enter the name of the new Competency Group in Title field;

b. Enter optional short description for the new Competency Group in the Description field:



The screenshot shows the 'Competency Group – New item form' with the following fields:

- Group Name ***: Technical Competencies
- Description**: These competencies represent the skill set required for specific functional areas. Contains subgroups.

Below the description field, there is a link: [Click for help about adding basic HTML formatting.](#)

At the bottom right, there are two buttons: **Save** and **Cancel**.

3) Click Save button to add new Competency Group to the Competency Groups list or click Cancel to discard the process.

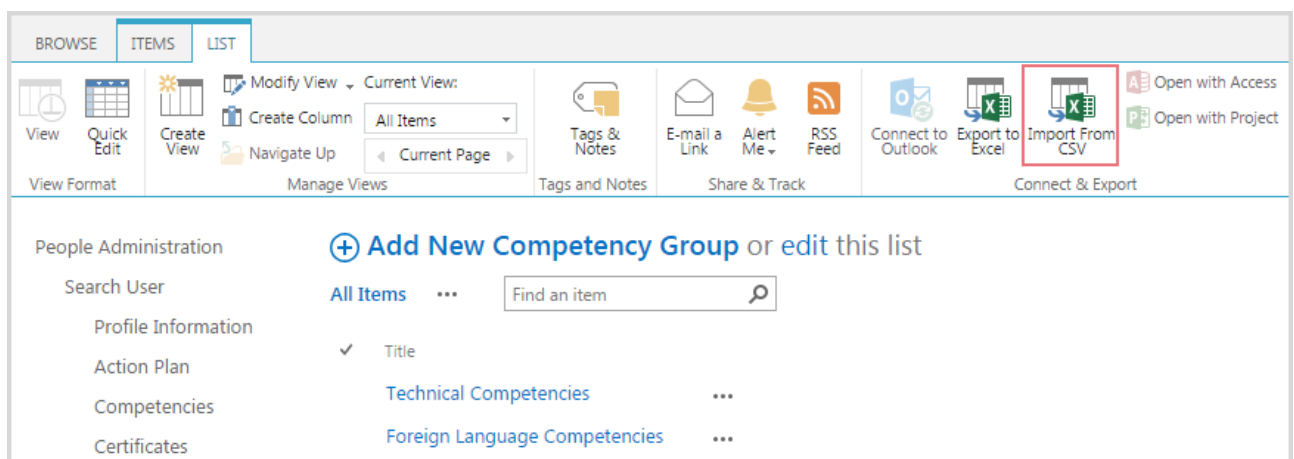
The user is redirected back to the Competency Groups list where newly added Competency Group is displayed.

4.4.2 Import Competency Group

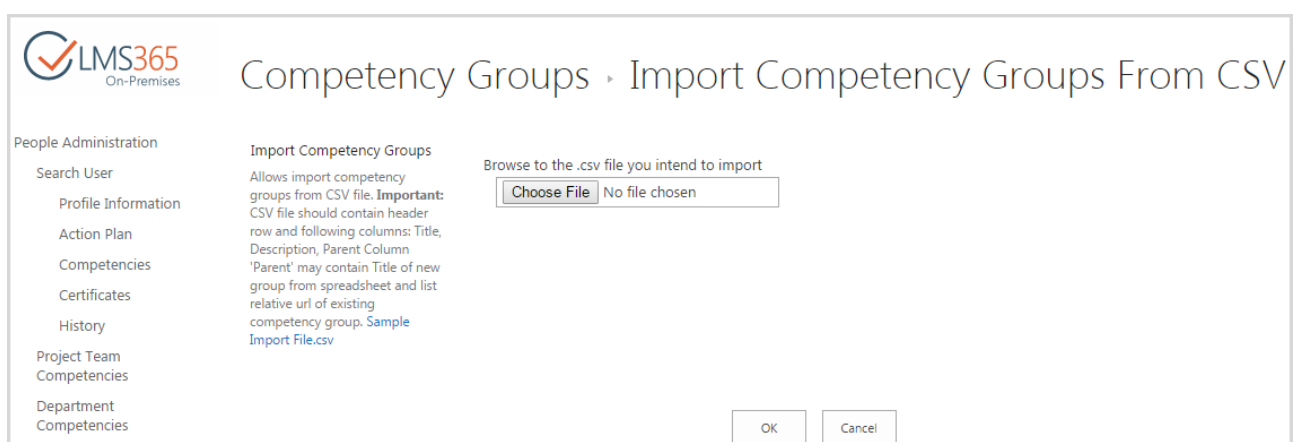
It is possible to import data from .csv file for the Competency Group item. The process of importing Competency Group is described below:

Import from .csv is designed for filling competency groups and can be used for bulk import of Competency Groups. To import a competency group, do the following actions:

- 1) Enter the Competency Groups list and click the Import from CSV button in the List Tools > List in the ribbon menu:



- 2) Select a .csv file from your computer for upload:



NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

Required columns can be set in Competency Groups > List > List Settings:

Column (click to edit)	Type	Used in
Created	Date and Time	
Description	Multiple lines of text	
Group Name	Single line of text	Competency Group
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Indexed columns](#)

All required columns are marked in the 'Required' column. To set a column as required/not required, click on the name of the needed column and select the needed option in the Additional Column Settings section:

Settings ▸ Edit Column ⓘ

Name and Type
Type a name for this column.

Column name:

The type of information in this column is:
Date and Time

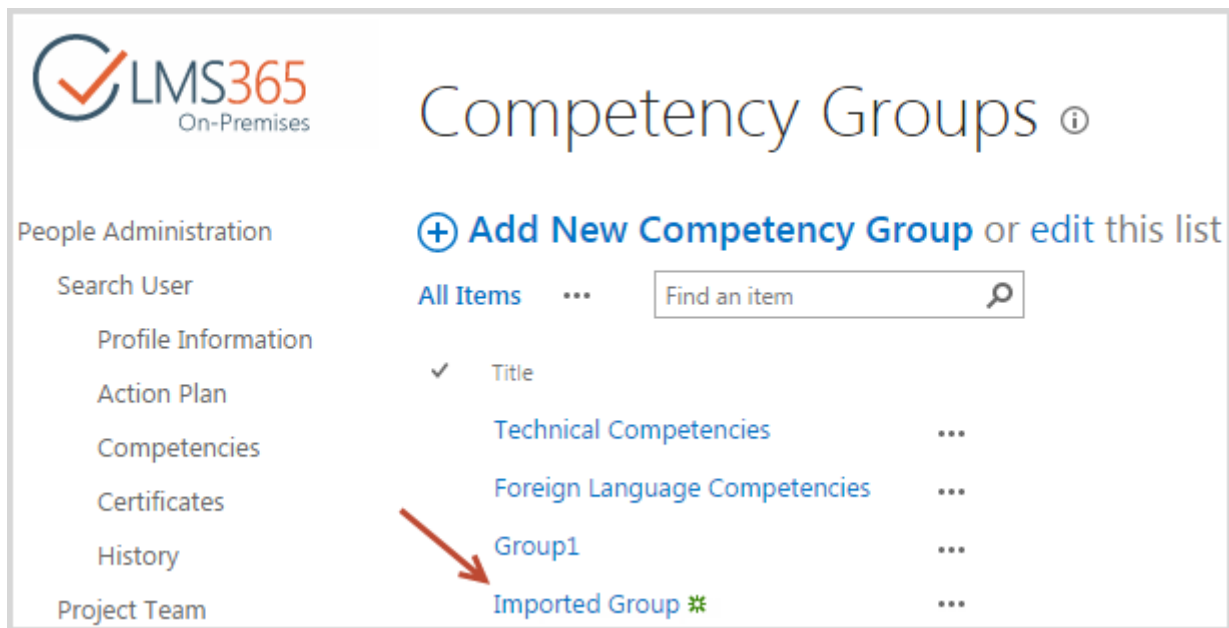
Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Display Format:
 Standard Friendly

Require that this column contains information:
 Yes No

3) Click OK to confirm import. The imported Competency Groups will be added to the list:

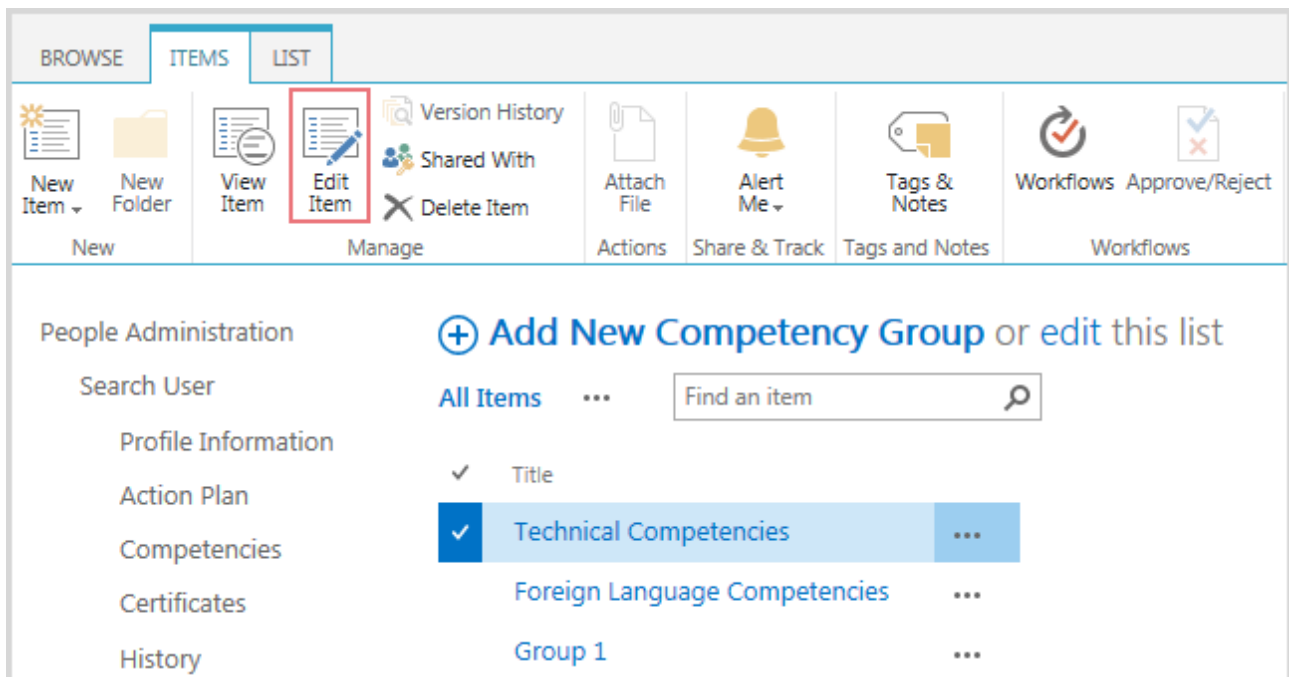


NOTE: If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Competency Group with incorrect data will be not uploaded and error will be displayed at the end of action.
 If imported Competency Group duplicates title of already existing one, a warning about item with duplicating title will be displayed.

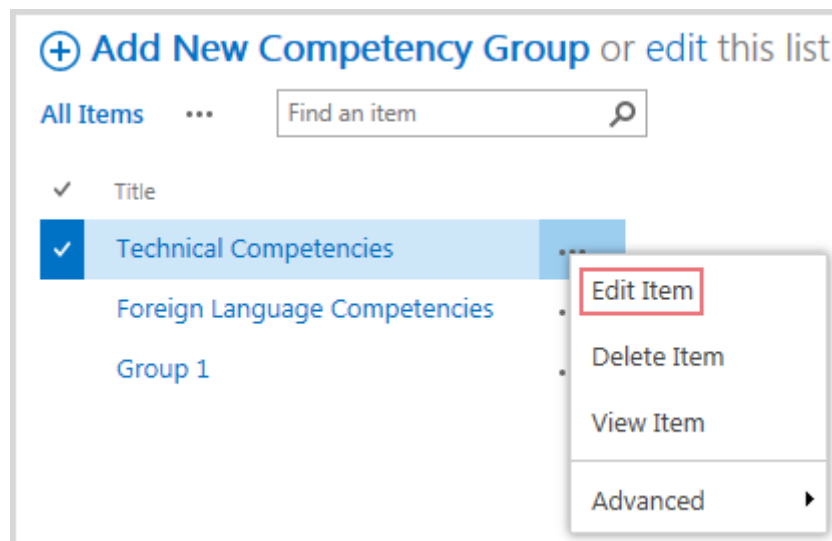
4.4.3 Edit Competency Group

To edit the Competency Group, the Global Administrator should follow the steps below:

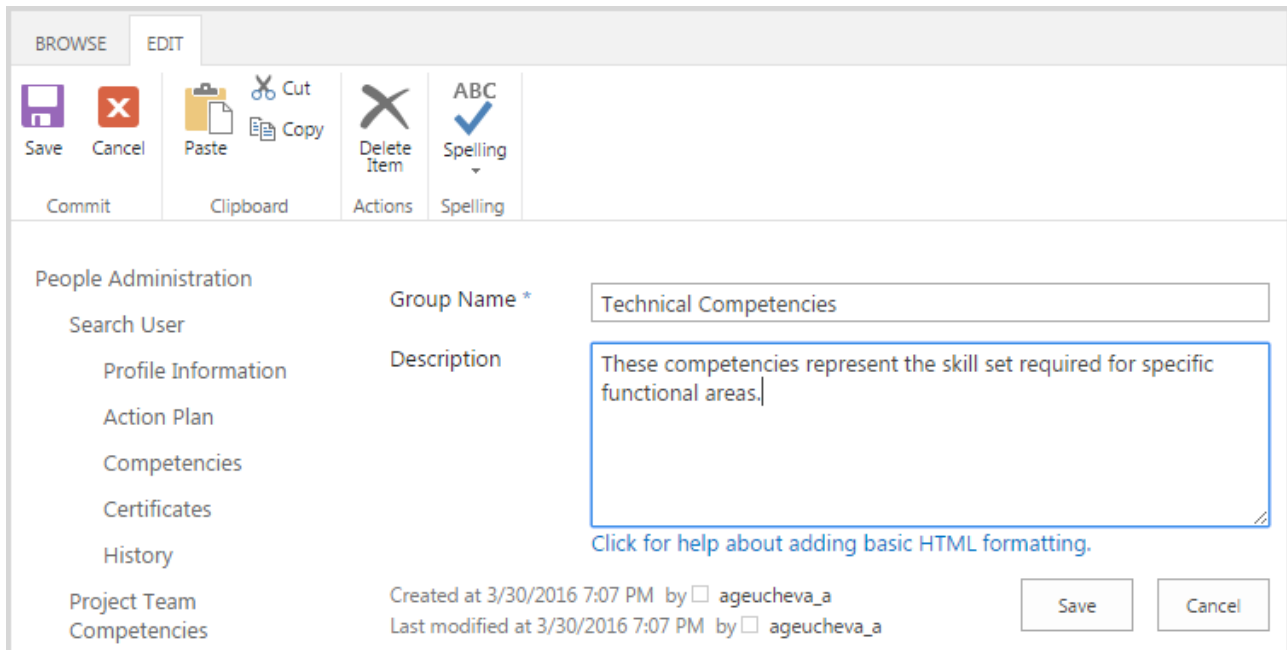
- 1) Open the Edit form via one of the ways described below:
 - a. Click on the Competency Group in the Competency Groups list to select it and from the ribbon choose Edit Item in the Items tab:



b. From the callout menu next to the Competency Group's name select Edit Item action:



- 2) Make the necessary changes to the Competency's metadata in the Competency Groups - Edit form:



- 3) Click Save button to confirm the changes made or click Cancel button to discard the process.

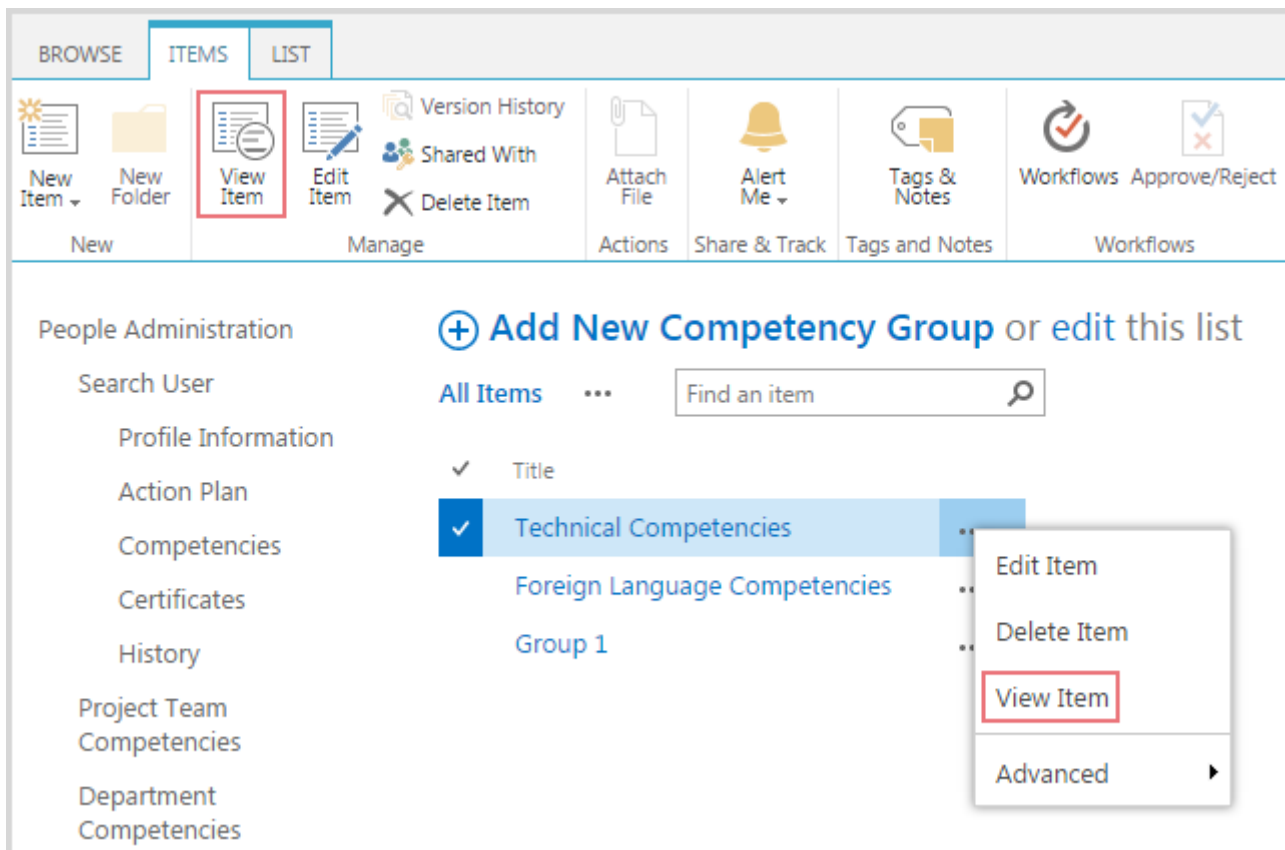
4.4.4 View Competency Group details

To see the details about the Competency Group, the user follows the steps below:

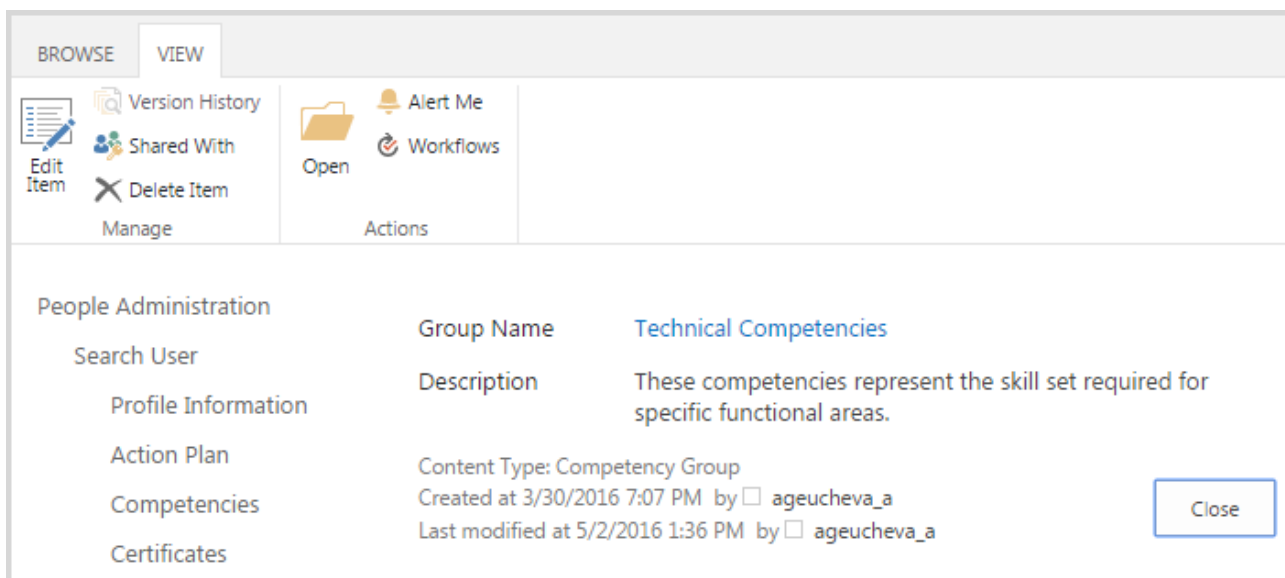
- 1) Open the Competency Group details form via one of the options described below:
 - a. From the callout menu next to the Competency Group's name select View Item action:

OR

- b. Click on the Competency Group in the Competency Groups list to select it and from the ribbon choose View Item in the Items tab:



2) View the metadata available for the selected Competency Group in the View form:



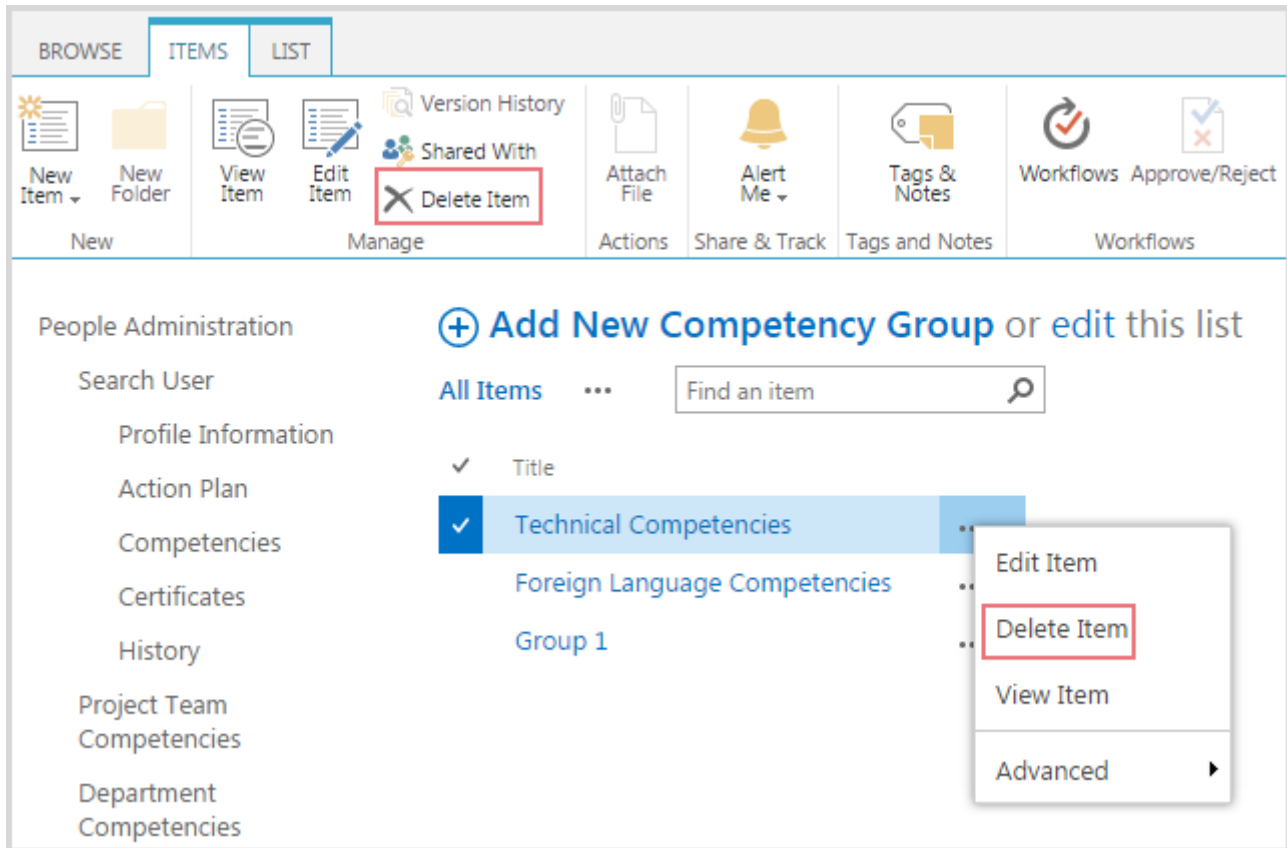
3) Click Close button to return to the Competency Groups list.

4.4.5 Delete Competency Group

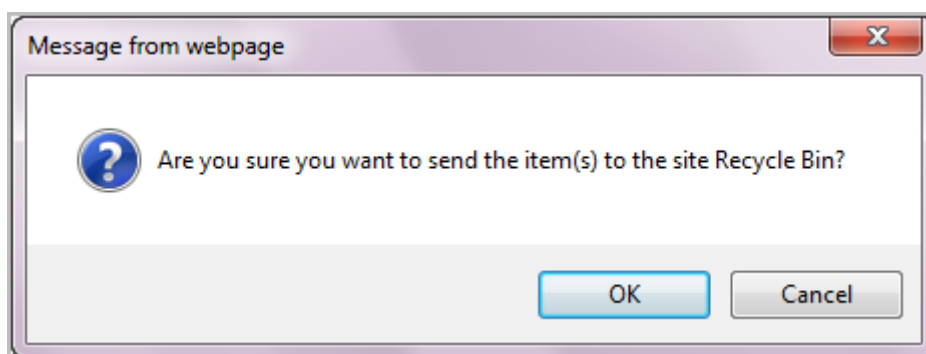
In order to delete the Competency Group, Global Administrator has to perform the following steps:

1) Open the Delete Competency Confirmation via one of the options described below:

- a. Click on the Competency Group in the Competency Groups list to select it and from the ribbon choose Delete Item in the Items tab;
- b. From the callout menu next to the Competency Group's name select Delete Item action:



The system will display the message asking to confirm the decision to permanently remove the Competency Group:



- 2) Click OK button to confirm the decision to remove the selected Competency Group or click Cancel to discard the process.

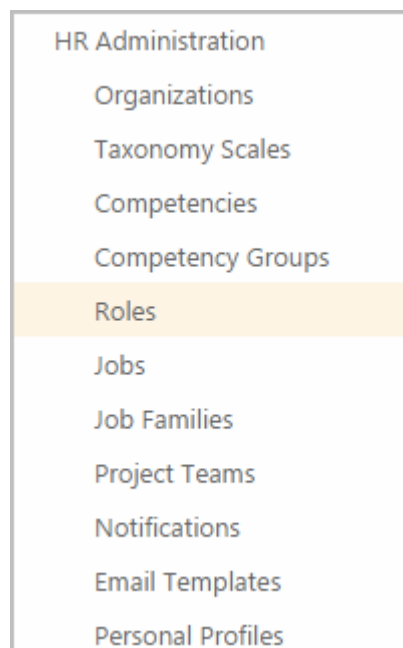
The user is redirected back to the Competency Groups list where removed item is no longer displayed.

NOTE:	<ul style="list-style-type: none"> Competency Group deletion is processed according to the OOTB SharePoint rules for deleting records When Competency Group is deleted, all Competencies belonging to this Competency Group are not deleted but this Competency Group is removed from their "Competency Group" field
--------------	--

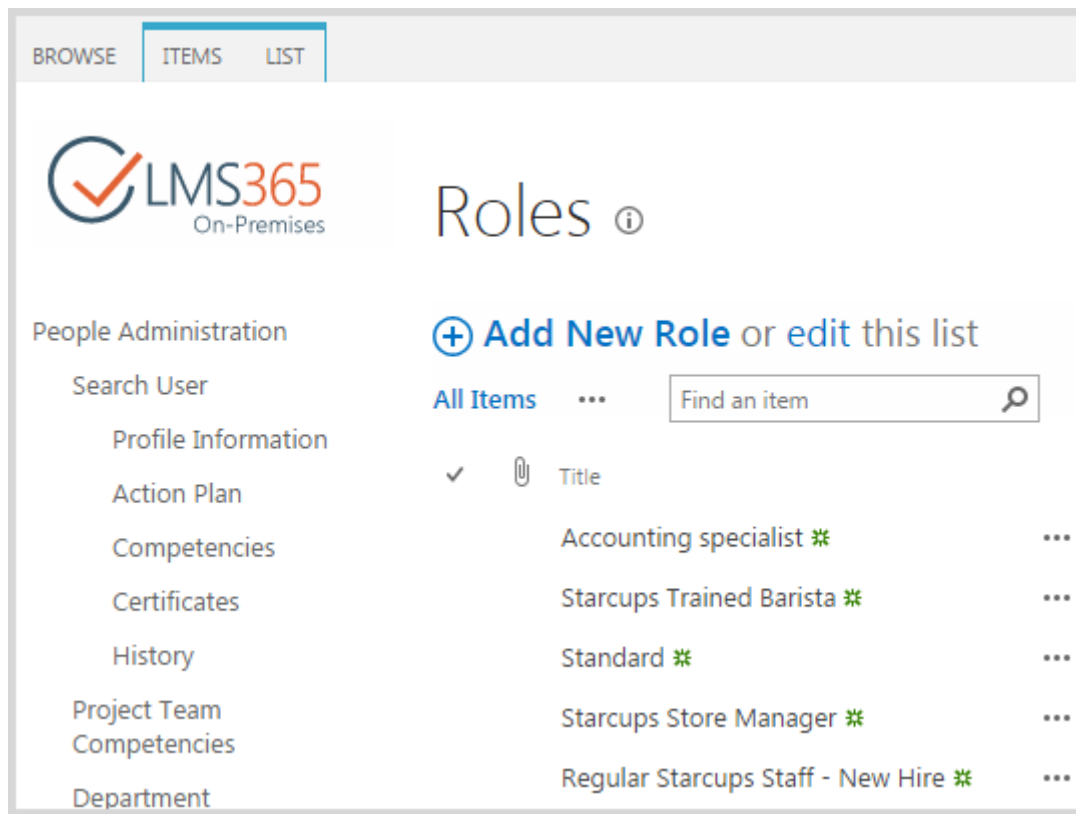
4.5 Roles

The Global Administrator defines the Roles for the Organization and has the full management control to add, edit, and delete the Roles. The Roles are stored in the list that the user can access by following the steps below:

- 1) Go to the Organization Home Page;
- 2) Click Roles in the left side menu in Common Tools:



The system will open the list of all Roles:



4.5.1 Add Role

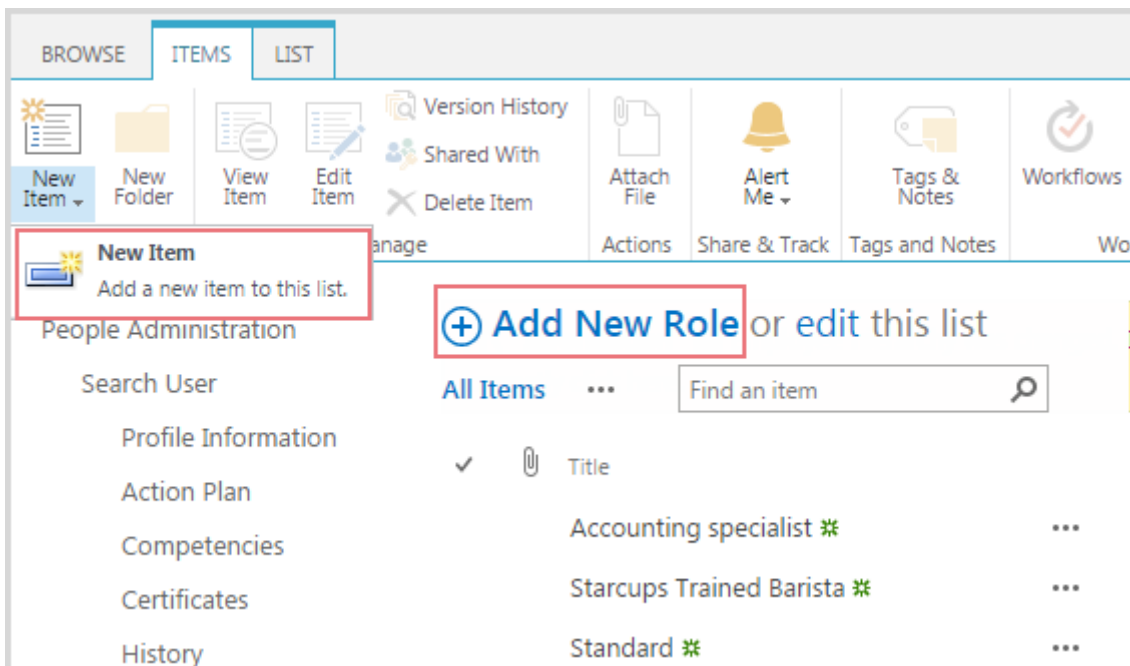
In order to add the new Role, Global Administrator should follow the steps below:

1) To open Add New Item form use either one of the options below:

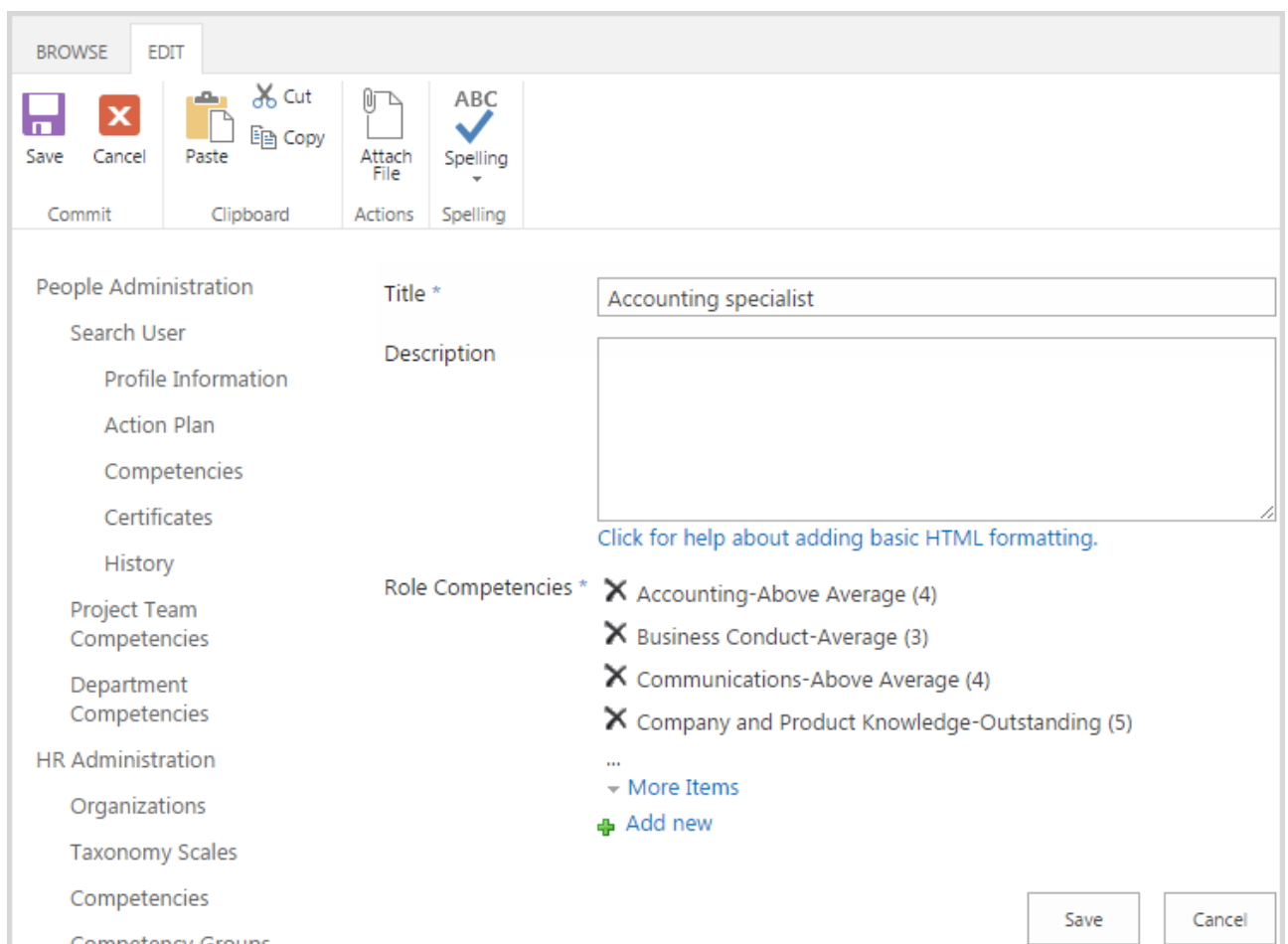
a. From the Roles list click Add New Role button ;

OR

b. On the ribbon go to Items > New Item and click New Item from the drop-down:



2) Fill out the Roles – New item form:



- a. Enter the name of the new Role in Title field;
- b. Enter optional short description for the new Role in the Description field;

- c. Add at least one Competency for this Role in Role Competencies field by clicking on Browse icon and picking the Competency(s) from the Competencies list.

3) Click Save button to add new Role to the Roles list or click Cancel to discard the process.

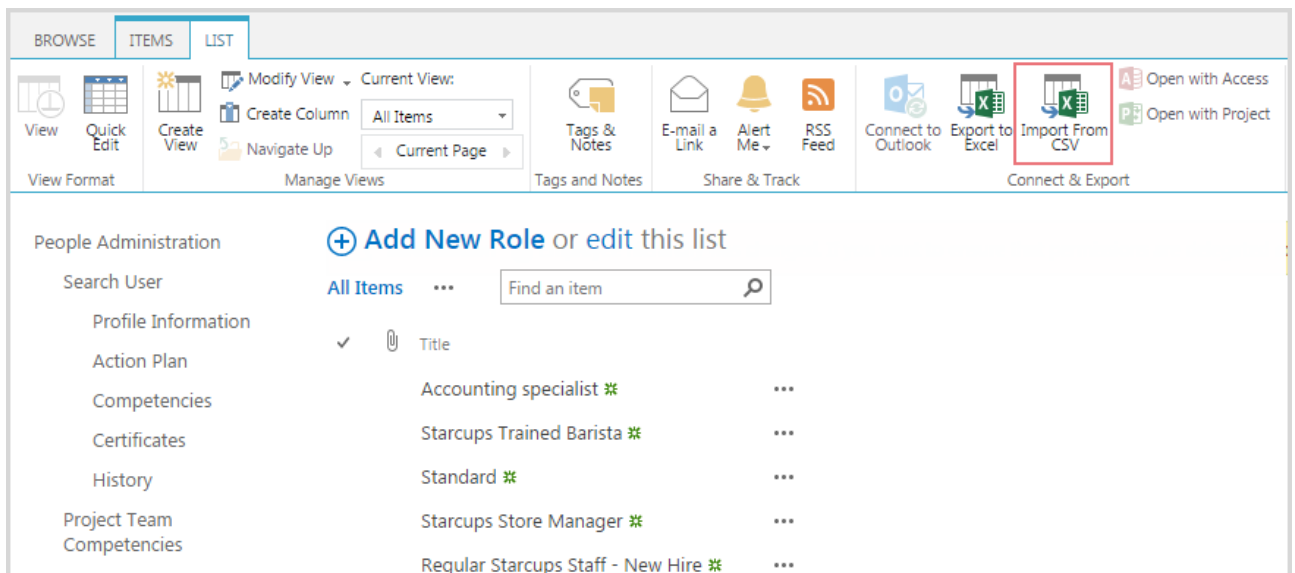
The user is redirected back to the Roles list where newly added Role is displayed.

4.5.2 Import Role

It is possible to import data from .csv file for the Role item. The process of importing Role is described below:

Import from .csv is designed for filling Roles and can be used for bulk import of Roles. To import a Role, do the following actions:


- 1) Enter the Roles list and click the Import from CSV button in the List Tools > List in the ribbon menu:



The screenshot shows the LMS365 interface with the 'LIST' tab selected in the ribbon. The 'Import From CSV' button is highlighted with a red box. Below the ribbon, the 'Add New Role or edit this list' section is visible, showing a search bar and a list of roles with their respective competencies.

Role	Competencies
Accounting specialist	Accounting specialist
Starcups Trained Barista	Starcups Trained Barista
Standard	Standard
Starcups Store Manager	Starcups Store Manager
Regular Starcups Staff - New Hire	Regular Starcups Staff - New Hire

- 2) Select a .csv file from your computer for upload:



Roles ▸ Import Roles From CSV

People Administration

- Search User
- Profile Information
- Action Plan
- Competencies
- Certificates
- History
- Project Team Competencies
- Department Competencies

HR Administration

- Organizations

Import Roles

Allows import roles from CSV.

Important: CSV file should contain semicolon delimited list header row and following columns: Title, Description, Competency Level Titles. Column 'Competency Level Titles' must contain comma separated list titles of existing competency levels

Please download example to see how to import roles. [Sample Import File.csv](#)

Continue processing file and ignore incorrect rows.

Choose File No file chosen

NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

Required columns can be set in Roles > List > List Settings:

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Description	Multiple lines of text	
Role Competencies	Competency	✓
Modified	Date and Time	
Created	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Column ordering](#)
- [Indexed columns](#)

All required columns are marked in the 'Required' column. To set a column as required/not required, click on the name of the needed column and select the needed option in the Additional Column Settings section:

Settings ▸ Edit Column ⓘ

Name and Type
Type a name for this column.

Column name:

The type of information in this column is:
Competency

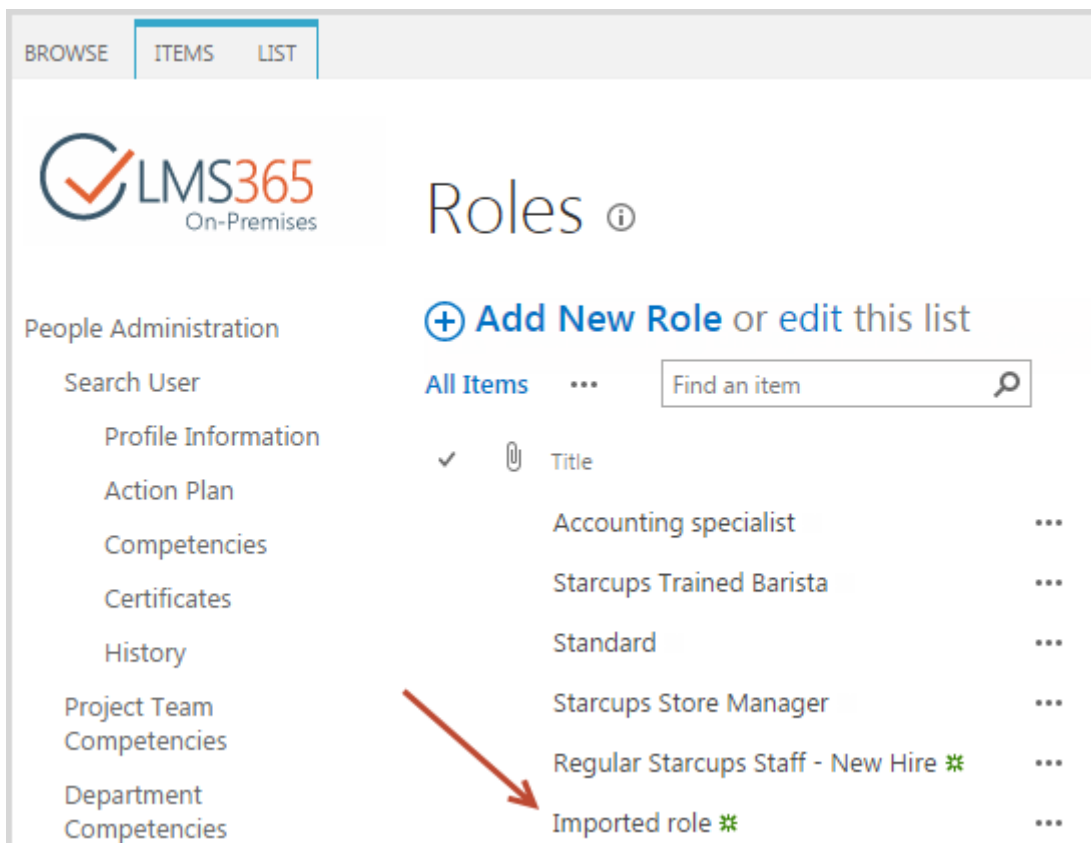
Additional Column Settings
Specify detailed options for the type of information you selected.

Description:


Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

3) Click OK to confirm import. The imported Role will be added to the list:



BROWSE ITEMS LIST

 Roles ⓘ

[+ Add New Role](#) or edit this list

All Items ...

✓	📄	Title	⋮
		Accounting specialist	⋮
		Starcups Trained Barista	⋮
		Standard	⋮
		Starcups Store Manager	⋮
		Regular Starcups Staff - New Hire ✳	⋮
		Imported role ✳	⋮

People Administration

Search User

- Profile Information
- Action Plan
- Competencies
- Certificates
- History
- Project Team
- Competencies
- Department
- Competencies

NOTE: If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Role with incorrect data will be not uploaded and error will be displayed at the end of action.

NOTE: If imported Role duplicates title of already existing one, a warning about item with duplicating title will be displayed. After synchronizing profile with this role will have status

“Incomplete”, as it is impossible to detect, which role is specified in the profile.

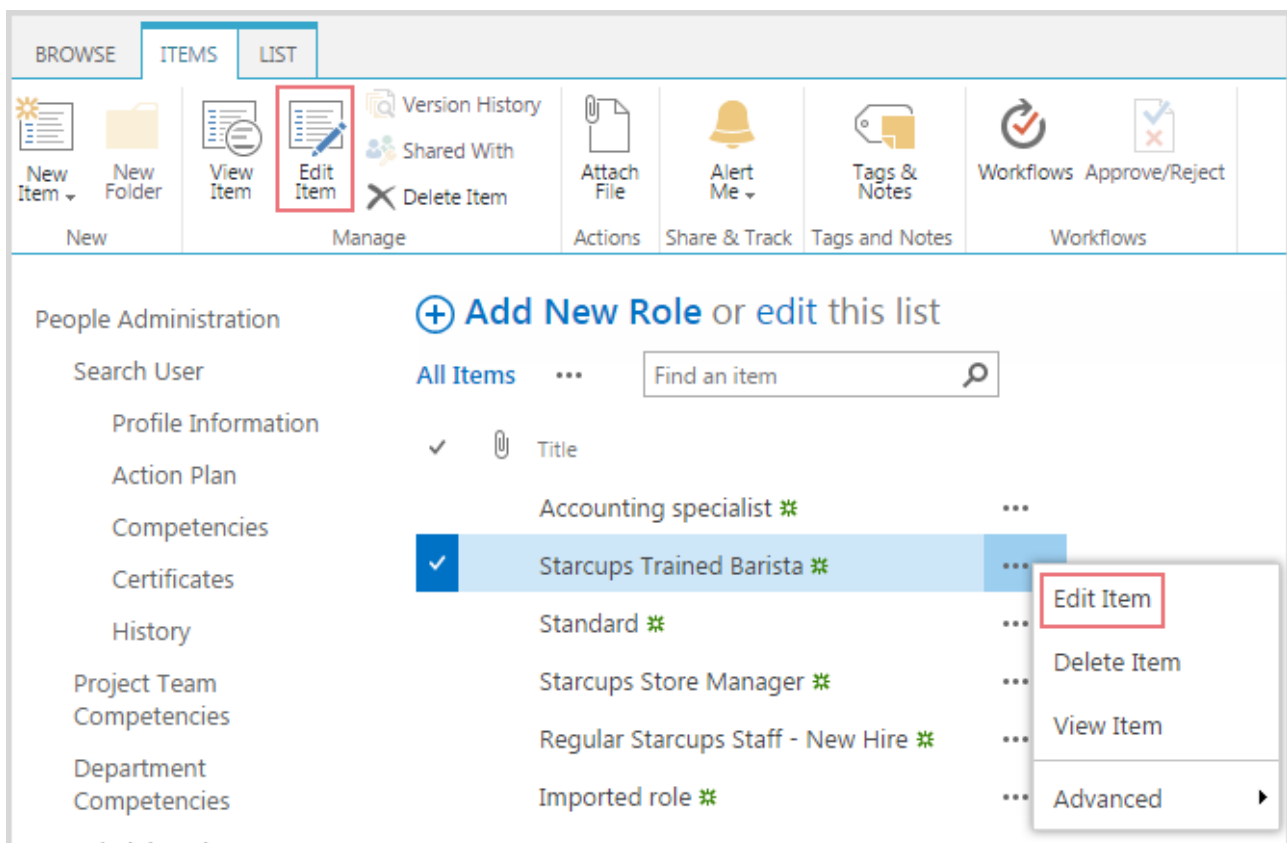
4.5.3 Edit Role

To edit the Role, the Global Administrator should follow the steps below:

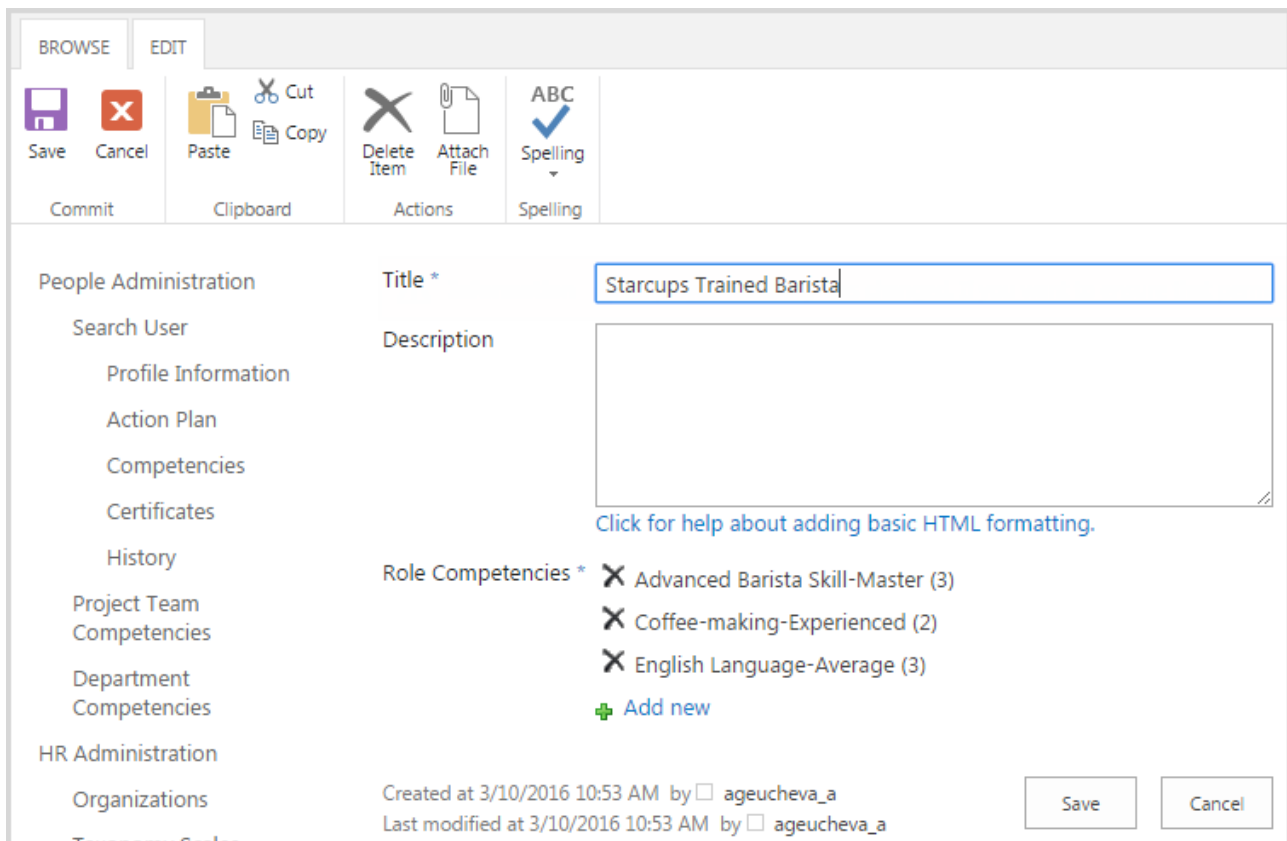
- 1) Open the Edit form via one of the ways described below:
 - a. Click on the Role to select it and from the ribbon choose Edit Item in the Items tab;

OR

- b. From the drop-down action list next to the Role’s name select Edit Item action:



- 2) Make the necessary changes to the Role’s metadata in the Edit form:



The screenshot shows the 'EDIT' tab of a user profile form. The ribbon includes 'Save', 'Cancel', 'Paste', 'Cut', 'Copy', 'Delete Item', 'Attach File', and 'Spelling'. The form fields are: 'Title *' (Starcups Trained Barista), 'Description' (empty), 'Role Competencies *' (Advanced Barista Skill-Master (3), Coffee-making-Experienced (2), English Language-Average (3), Add new), and 'Created at' (3/10/2016 10:53 AM by agecheva_a). The left sidebar shows navigation options like 'People Administration', 'Search User', 'Profile Information', 'Action Plan', 'Competencies', 'Certificates', 'History', 'Project Team', 'Competencies', 'Department', 'Competencies', 'HR Administration', 'Organizations', and 'Training Scales'. 'Save' and 'Cancel' buttons are at the bottom right.

3) Click Save button to save the updates or click Cancel to discard the process.

The user is redirected back to the Role's list.

NOTE: Role's modify action is processed according to the OOTB SharePoint rules for deleting records.

4.5.4 View Role's details

To view the detailed information about the Role, the user should follow the following steps:

- 1) Click View Item either from the ribbon (Items=>View Item) or from the drop-down next to the Role's name:

BROWSE ITEMS LIST

New Item New Folder View Item Edit Item Version History Shared With Attach File Alert Me Tags & Notes Workflows Approve/Reject Delete Item

New Manage Actions Share & Track Tags and Notes Workflows

People Administration

Search User

Profile Information

Action Plan

Competencies

Certificates

History

Project Team

Competencies

Department

Competencies

+ Add New Role or edit this list

All Items Find an item

✓ Title

Accounting specialist ✱

✓ Starcups Trained Barista ✱

Standard ✱

Starcups Store Manager ✱

Regular Starcups Staff - New Hire ✱

Imported role ✱

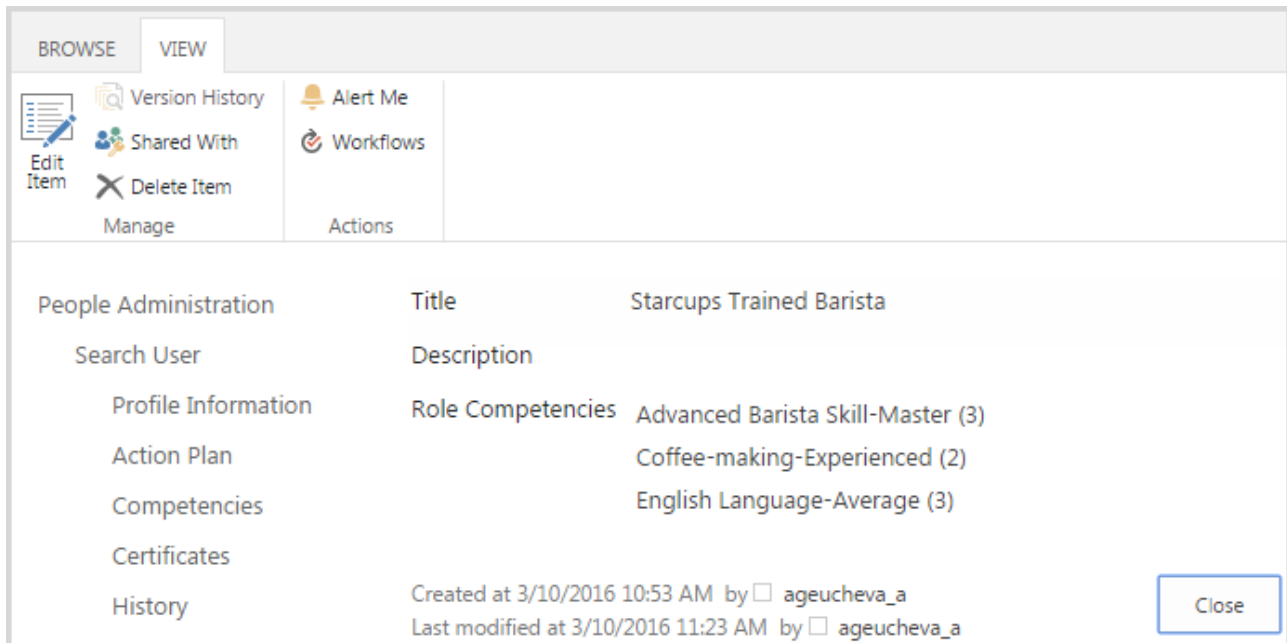
Edit Item

Delete Item

View Item

Advanced ▶

The system will display the form with all the details pertaining to the selected Role such as Title, Description, and Competencies that has been mapped to the Role:



The screenshot shows a software interface with a ribbon at the top containing 'BROWSE' and 'VIEW' tabs. Under the 'VIEW' tab, there are several action buttons: 'Edit Item', 'Version History', 'Alert Me', 'Shared With', 'Delete Item', 'Workflows', and 'Manage'. Below the ribbon, the main content area displays the following information:

People Administration	Title	Starcups Trained Barista
Search User	Description	
Profile Information	Role Competencies	Advanced Barista Skill-Master (3)
Action Plan		Coffee-making-Experienced (2)
Competencies		English Language-Average (3)
Certificates		
History	Created at 3/10/2016 10:53 AM by <input type="checkbox"/> ageucheveva_a	Close
	Last modified at 3/10/2016 11:23 AM by <input type="checkbox"/> ageucheveva_a	

- 2) Click Close button to return to the Roles list.

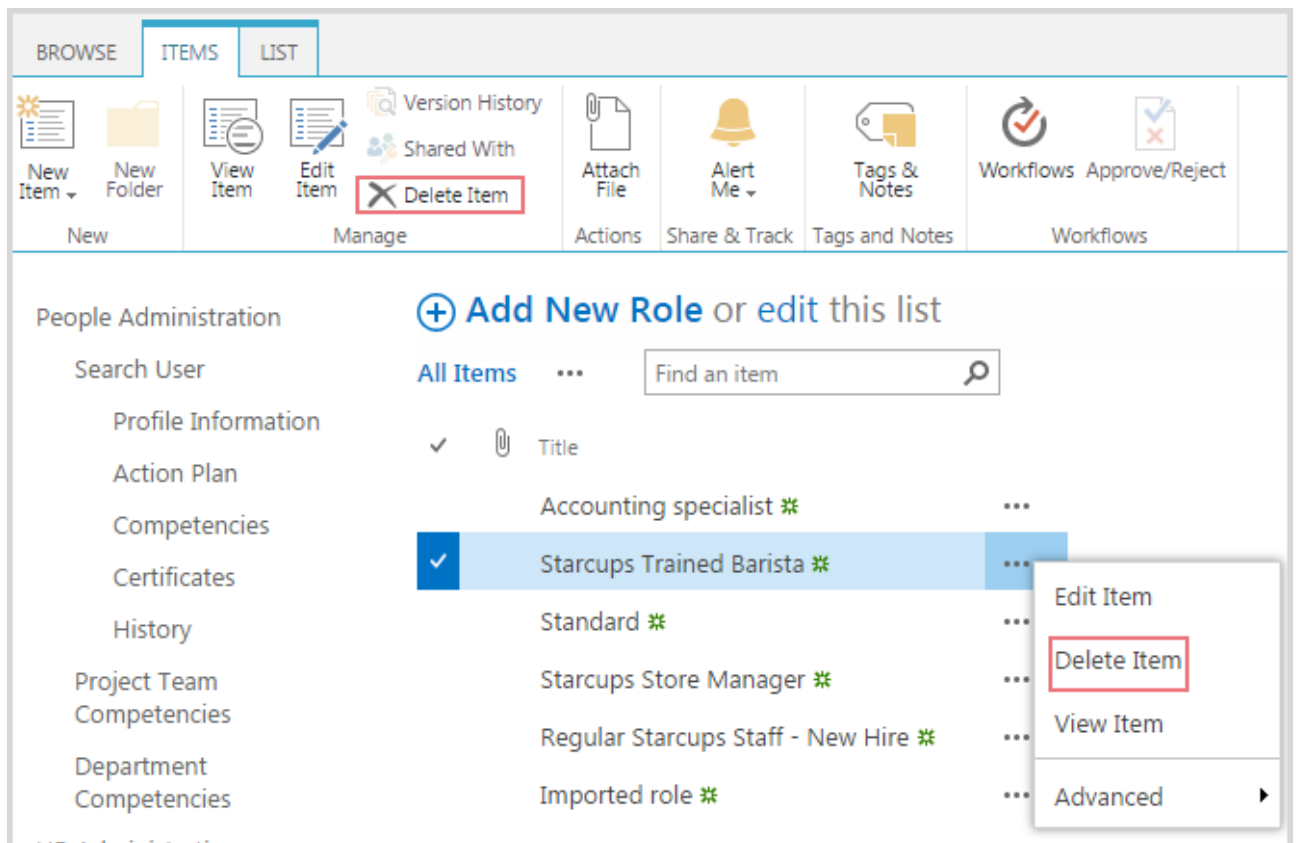
4.5.5 Delete Role

To remove the Role from the Roles list, the Global Administrator should follow the steps below:

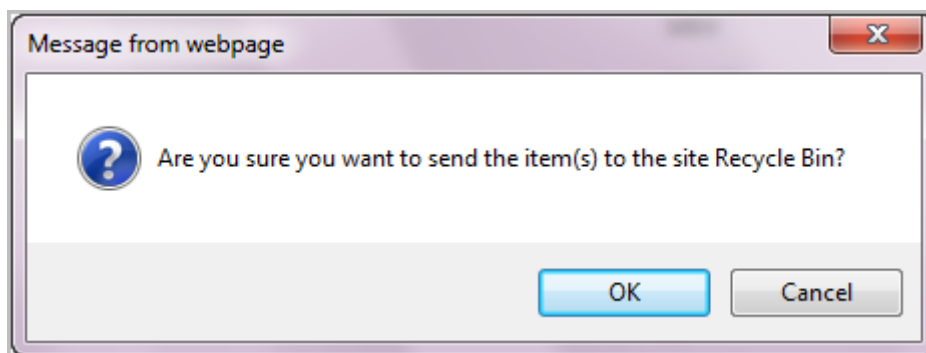
- 1) Click Delete Item either
 - a. From the drop-down action list next to the Role's name;

OR

- b. From the ribbon (Items > Delete Item) after clicking on the Role to select it in the Roles list:



2) The system asks the user to confirm the decision to permanently remove the selected Role:



3) Click OK button to confirm the deletion or Cancel button to discard the process.

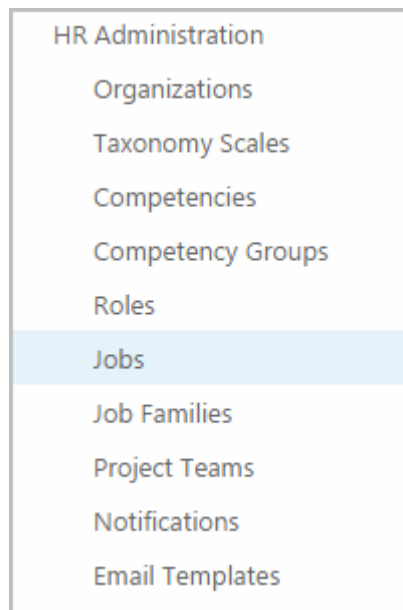
The user is redirected back to the Roles list where the removed Role is no longer displayed.

- NOTE:**
- Role's delete action is processed according to the OOTB SharePoint rules for deleting records.
 - Roles are not removed from Action Plan but marked as obsolete

4.6 Jobs


The Global Administrator defines the Jobs dictionary with full administrative control to add, modify and delete. The Jobs are stored in the Jobs list that can be accessed and viewed by following the steps below:

- 1) Click on Jobs link in the Common Tools from the left side menu on the Home Page;
The system will redirect the user to the list of all Jobs:



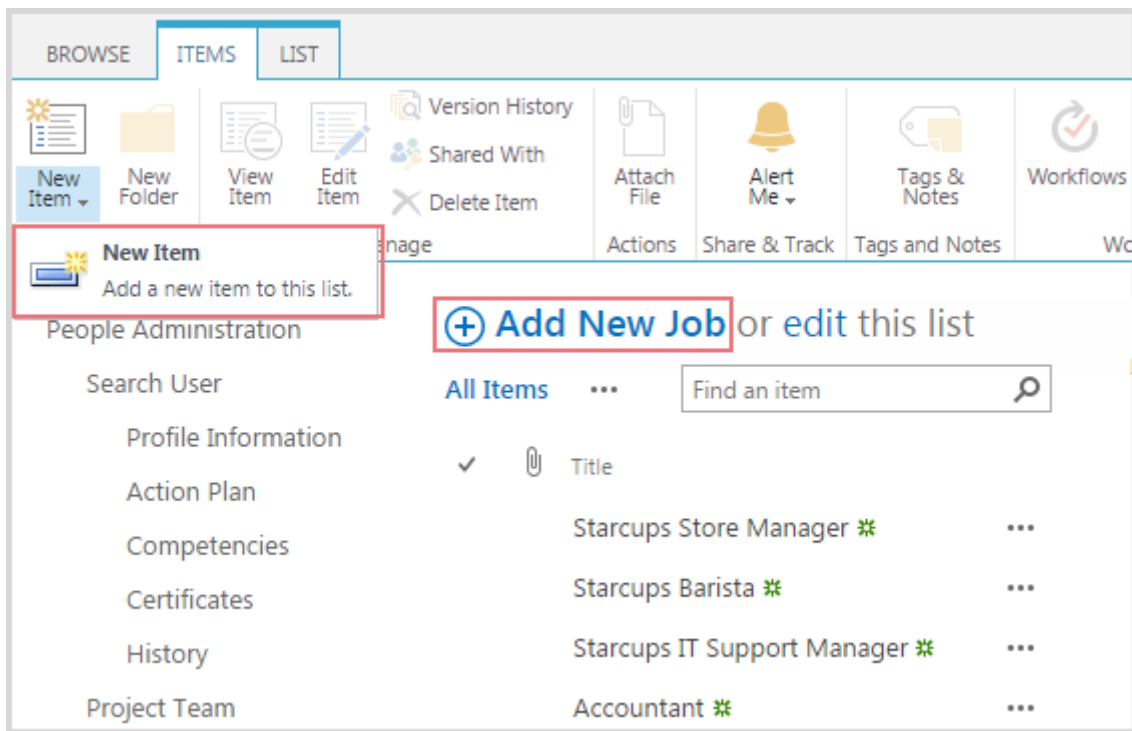
4.6.1 Add Job

In order to add the new Job, Global Administrator should follow the steps below:

- 1) To open Add New Item form use either one of the options below:
 - a. From the Jobs list click Add New Job button ;

OR

- b. On the ribbon go to Items >New Item and click New Item from the drop-down:







2) Fill out the Jobs – New item form:

- Title – enter the name of the new Job;
- Description – optionally add short description for the new Job;
- Other Information – optionally add any other information pertaining to this new Job that might be of importance to other Administrators;
- Key Responsibilities – list the key responsibilities for new Job;
- Priority – choose the Priority: Critical, High, Normal or Low:

Title *	<input type="text" value="Starbucks Barista"/>
Description	<input type="text" value="Experienced employee"/> Click for help about adding basic HTML formatting.
Other Information	<input type="text"/> Click for help about adding basic HTML formatting.
Key Responsibilities	<input type="text" value="Make coffee"/> Click for help about adding basic HTML formatting.
Priority *	<input type="radio"/> Critical <input type="radio"/> High <input checked="" type="radio"/> Normal <input type="radio"/> Low

- 3) Next, add the following items to the new Job's metadata fields:
- Next Career Steps – optionally list the possible Job(s) that the employee holding this Job can take in the future as his career growth opportunity;
 - Required Roles – list all the Roles that are included in the new Job and must be performed by the holder of the Jo;
 - Optional Roles – optionally list the Roles that the holder of the Job should but not required to possess.

The Global Administrator can remove the added Next career Steps, Required and Optional Roles using the Check Names and Browse buttons:

Next Career Steps	<input type="text" value="Starcups Store Manager;"/> 
Required Roles *	<input type="text" value="Starcups Trained Barista;"/> 
Optional Roles	<p>Coffee-making-Experienced Company and Product Knowledge-Experienced Customer Focus-Experienced English - Spoken-Average</p> <input type="text"/> 
Job Family	<input type="text" value="Starcups Store Employees;"/> 
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

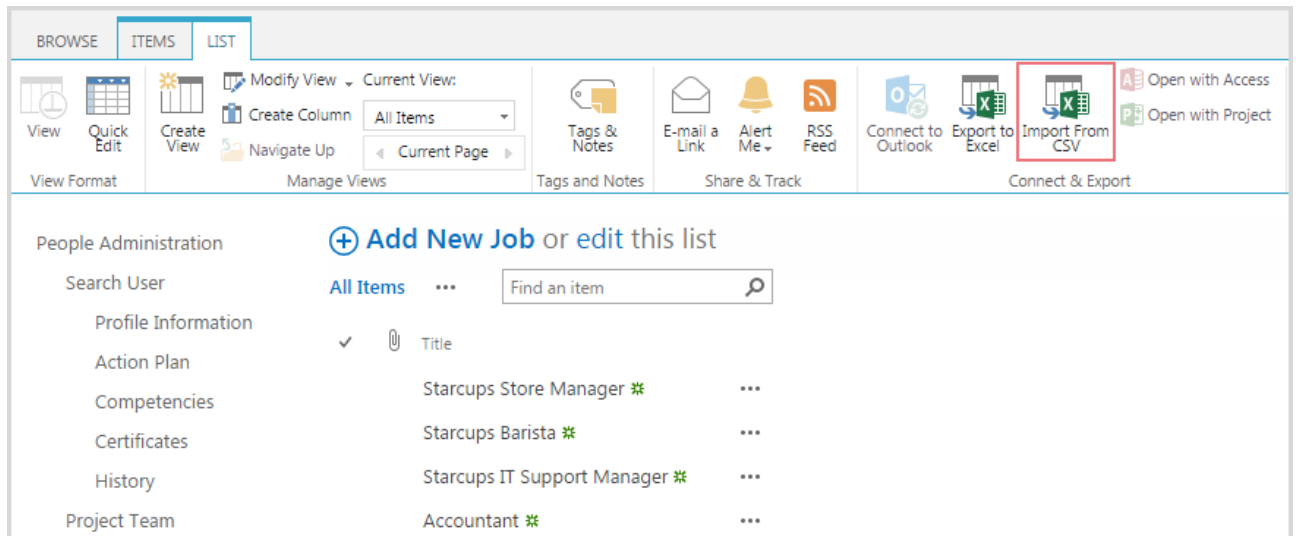
4) Click Save button to add new Job to the Jobs list or click Cancel to discard the process. The user is redirected back to the Jobs list where newly added Job is displayed.

4.6.2 Import Job

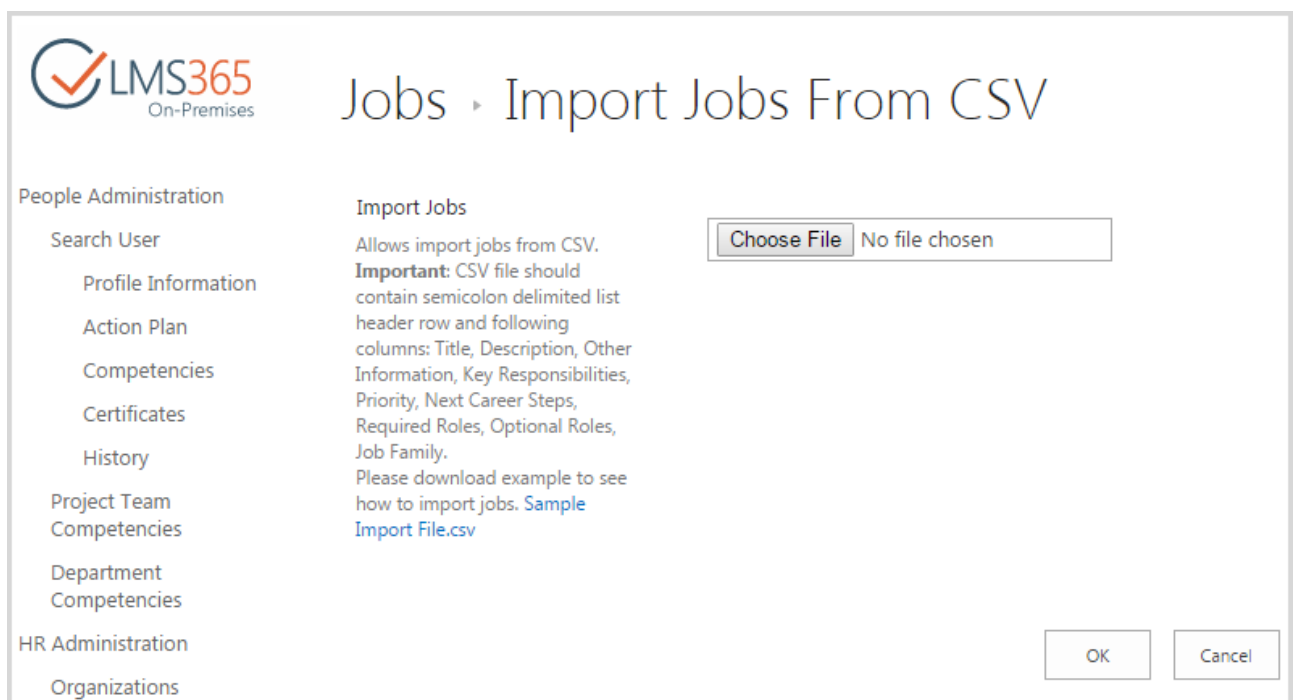
It is possible to import data from .csv file for the Job item. The process of importing Job is described below:

Import from .csv is designed for filling Jobs and can be used for bulk import of Jobs. To import a Job, do the following actions:

- 1) Enter the Jobs list and click the Import from CSV button in the List Tools > List in the ribbon menu:



- 2) Select a .csv file from your computer for upload:



NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data. Required columns can be set in Jobs > List > List Settings:

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Description	Multiple lines of text	
Other Information	Multiple lines of text	
Key Responsibilities	Multiple lines of text	✓
Priority	Choice	✓
Next Career Steps	Job	

All required columns are marked in the 'Required' column. To set a column as required/not required, click on the name of the needed column and select the needed option in the Additional Column Settings section:

Settings ▸ Edit Column ⓘ

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

Single line of text

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

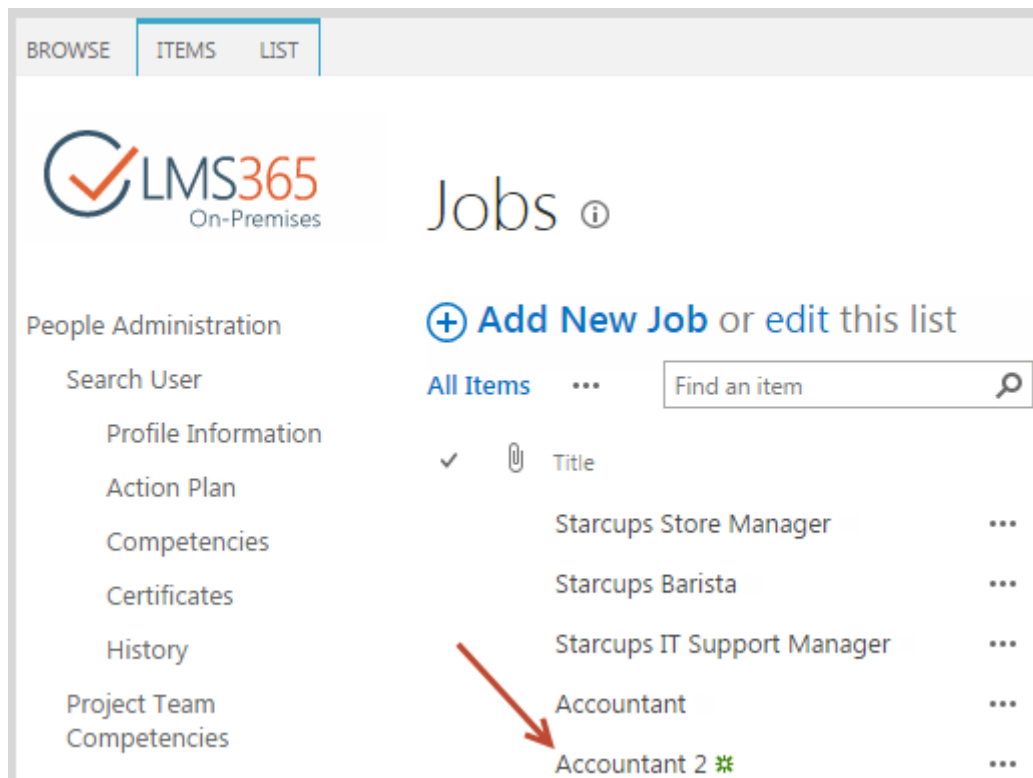
Yes No

Enforce unique values:

Yes No

Maximum number of characters:

3) Click OK to confirm import. The imported Job will be added to the list:



- NOTE:** If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Job with incorrect data will be not uploaded and error will be displayed at the end of action.
- NOTE:** If imported Job duplicates title of already existing one, a warning about item with duplicating title will be displayed. After synchronizing profile with this job will have status "Incomplete", as it is impossible to detect, which job is specified in the profile.

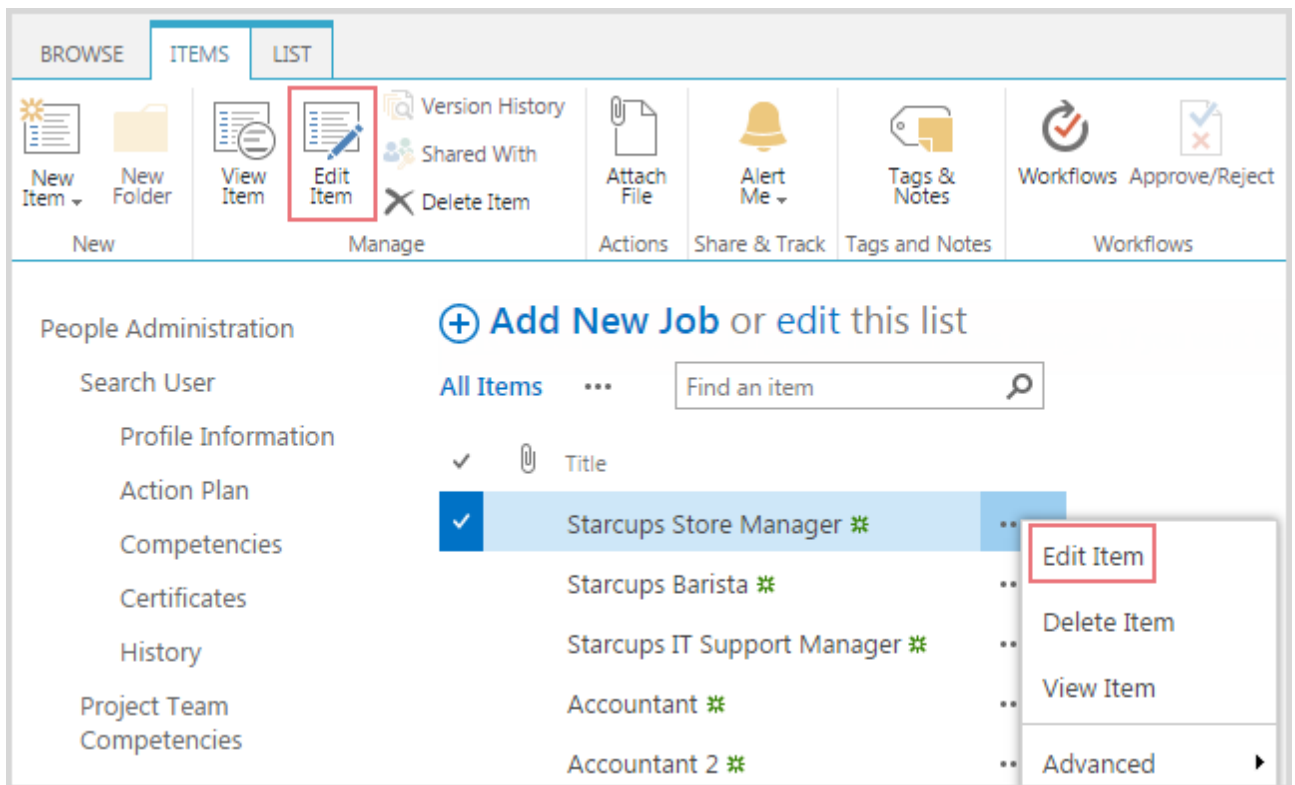
4.6.3 Edit Job

To edit the Job, the Global Administrator should follow the steps below:

- 1) Open the Edit form via one of the ways described below:
 - a. Click on the Job to select it and from the ribbon choose Edit Item in the Items tab;

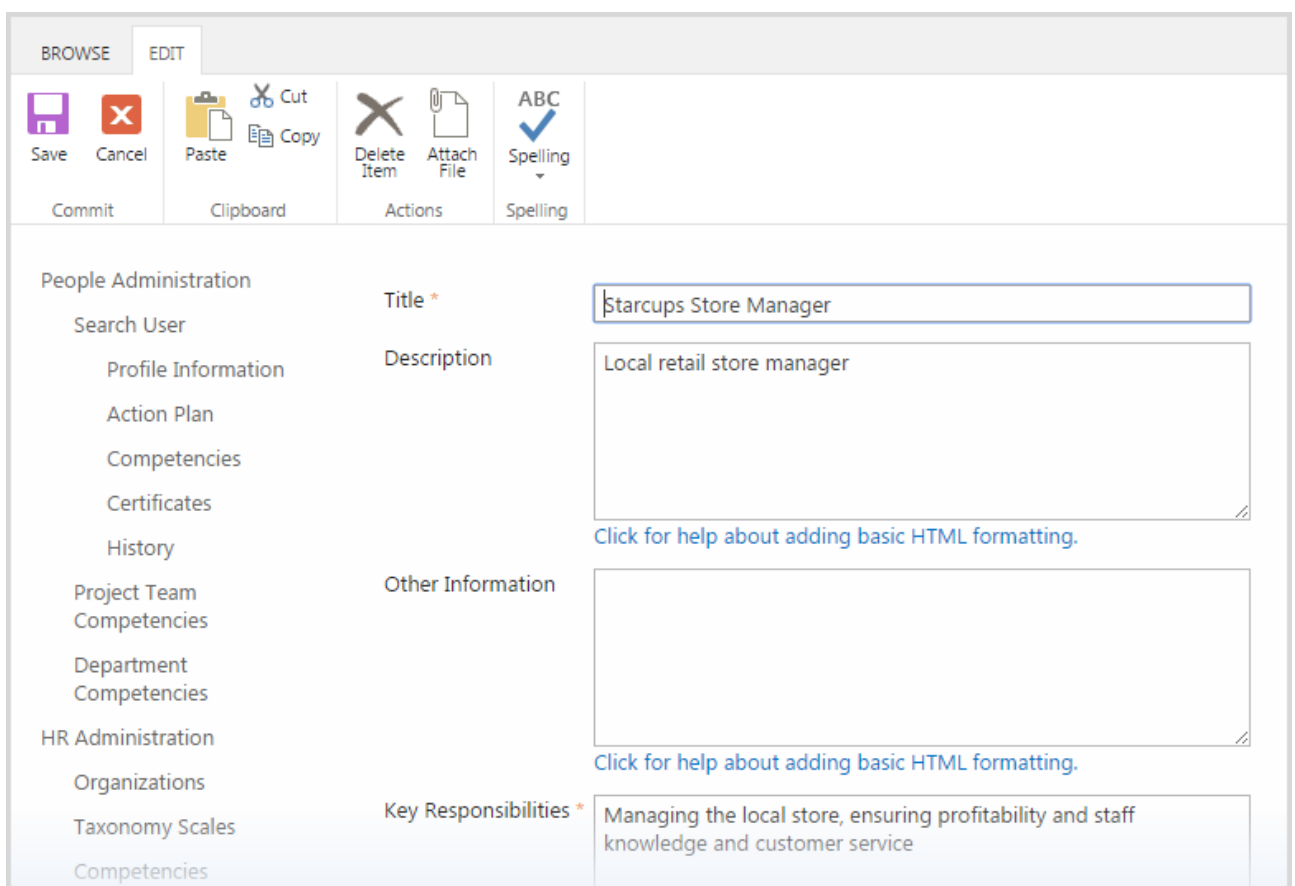
OR

- b. From the drop-down action list next to the Job's name select Edit Item action:



The screenshot shows the LMS365 interface with the 'ITEMS' tab selected. The top navigation bar includes 'BROWSE', 'ITEMS', and 'LIST'. Below this is a toolbar with various icons for actions like 'New Item', 'New Folder', 'View Item', 'Edit Item', 'Delete Item', 'Attach File', 'Alert Me', 'Tags & Notes', 'Workflows', and 'Approve/Reject'. The main content area is titled 'People Administration' and features a '+ Add New Job or edit this list' button. A search bar is present with the text 'Find an item'. A list of jobs is displayed, including 'Starcups Store Manager', 'Starcups Barista', 'Starcups IT Support Manager', 'Accountant', and 'Accountant 2'. A context menu is open over the 'Starcups Store Manager' job, showing options like 'Edit Item', 'Delete Item', 'View Item', and 'Advanced'. The 'Edit Item' option is highlighted with a red box.

2) Make the necessary changes to the Job's metadata fields in the Edit form:



The screenshot shows the 'EDIT' form for a job. The top navigation bar includes 'BROWSE' and 'EDIT'. Below this is a toolbar with various icons for actions like 'Save', 'Cancel', 'Paste', 'Copy', 'Delete Item', 'Attach File', and 'Spelling'. The main content area is titled 'People Administration' and features a search bar. The form is divided into sections: 'People Administration' (with sub-sections like Search User, Profile Information, Action Plan, Competencies, Certificates, History, Project Team, and Competencies), 'HR Administration' (with sub-sections like Organizations, Taxonomy Scales, and Competencies), and 'Key Responsibilities'. The 'Title' field contains 'Starcups Store Manager', the 'Description' field contains 'Local retail store manager', and the 'Key Responsibilities' field contains 'Managing the local store, ensuring profitability and staff knowledge and customer service'. There are also links for help about adding basic HTML formatting.

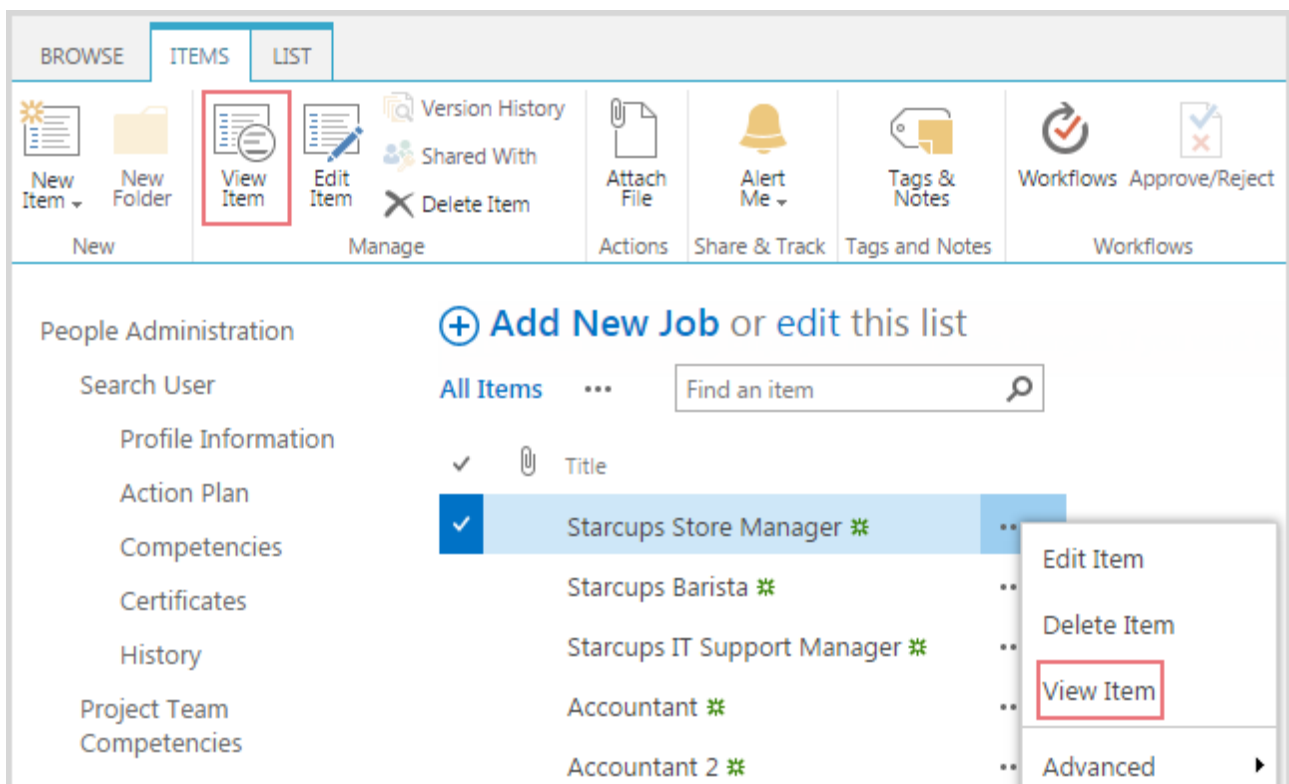
3) Click Save button to save the updates or click Cancel to discard the process.

The user is redirected back to the Jobs list.

4.6.4 View Job's details


To view the detailed information about the Job, the user should follow the following steps:


- 1) Click View Item either from the ribbon (Items=>View Item) or from the drop-down action list next to the Job's name:




The system will display the form with all the details pertaining to the selected Job such as Title, Description and Other Information, Key Responsibilities, Priority Level, and Required and Optional Roles that has been mapped to the Job:


BROWSE
VIEW


 Edit Item


 Delete Item

Manage

 Version History

 Shared With

 Alert Me

 Workflows







Actions

People Administration	Title	Starcups Barista
Search User	Description	
Profile Information	Other Information	
Action Plan	Key Responsibilities	Make coffee
Competencies	Priority	Normal
Certificates	Next Career Steps	Starcups Store Manager
History	Required Roles	Starcups Trained Barista
Project Team	Optional Roles	
Competencies	Job Family	Starcups Store Employees;
Department	Competencies	Required: Advanced Barista Skill-Master ; English Language-Average ; Coffee-making-Experienced ;
Competencies		
HR Administration		
Organizations	Created at 3/10/2016 11:31 AM by <input type="checkbox"/> ageucheva_a	Close
	Last modified at 3/10/2016 11:31 AM by <input type="checkbox"/> ageucheva_a	

- 2) The user has an option to also view the detailed information about each item in Next career Steps required Roles and Optional Roles:
 - a. Click on the item in the Next career Steps list;

System will redirect the user to the page with the detailed information about the selected Job.

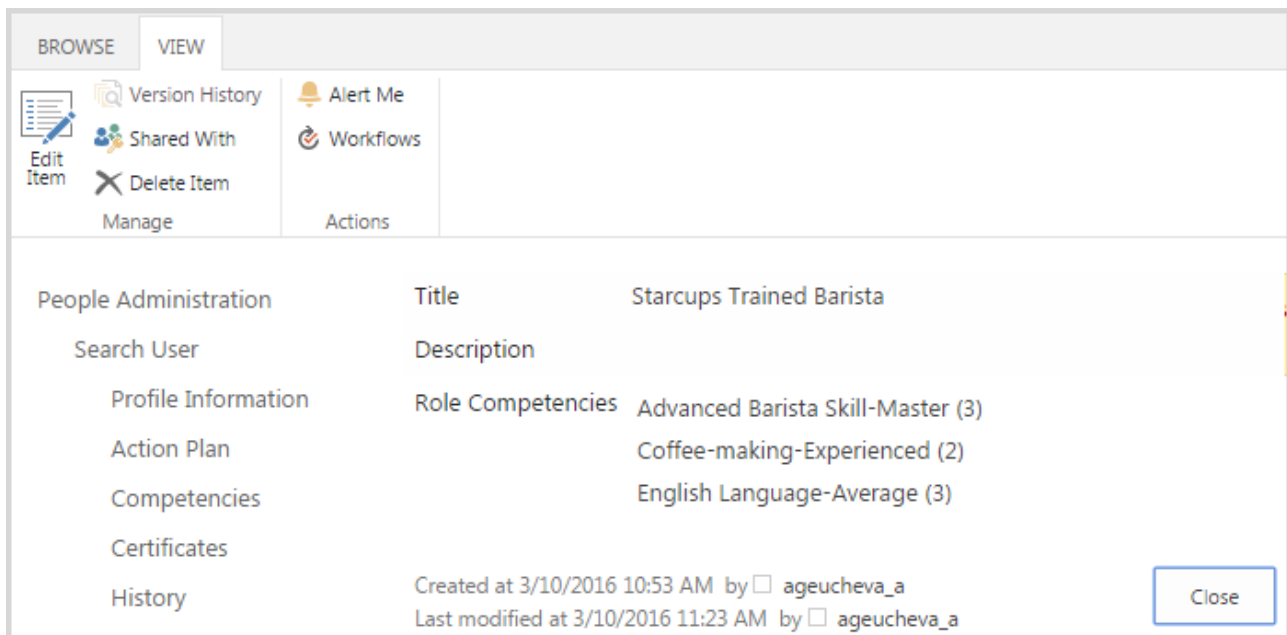
For instance, the user clicks on Starcups Store manager in the Next Career Steps field in the form above. The system will redirect the user to the selected Job's page:

BROWSE		VIEW	
	 Version History	 Alert Me	
	Shared With	 Workflows	
	Delete Item		
Manage		Actions	

People Administration	Title	Starcups Store Manager
Search User	Description	Experienced Employee
Profile Information	Other Information	
Action Plan	Key Responsibilities	Managing the local store, ensuring profitability and staff knowledge as well as customer service
Competencies	Priority	Normal
Certificates	Next Career Steps	
History	Required Roles	Starcups Trained Barista
Project Team	Optional Roles	
Competencies	Job Family	Starcups Store Employees;
Department	Competencies	Required: Advanced Barista Skill-Master;English Language-Average;Coffee-making-Experienced;
Competencies		
HR Administration		
Organizations		
Taxonomy Scales	Created at 3/10/2016 11:30 AM by <input type="checkbox"/> ageucheva_a	
	Last modified at 3/10/2016 12:05 PM by <input type="checkbox"/> ageucheva_a	<input type="button" value="Close"/>

Please, note, that the displayed detailed information about the selected Job also allows the user to choose an item from Next Career Steps, Required or Optional Roles to view the detailed information about the items of interest in these fields.

- b. Click Close button to return to the detailed information page about the Job;
- c. The user can also click on the item in the Required or Optional Roles fields to see the details about the Roles. For example, user chooses role-1 in Optional Roles. The system will open the page with detailed information about the selected Role:



The Title, Description and the list of Competencies mapped to the Role will be displayed.

Please, note that the user can choose to view the Competency's details from the Role Competencies by clicking on it. The system will redirect the user to the page with the detailed information about the selected Competency. Refer to the [section View Role's details](#) for more information on this option.

d. Click Close button to return to the Job's details form.

3) Click Close button to return to the Jobs list.

4.6.5 Delete Job

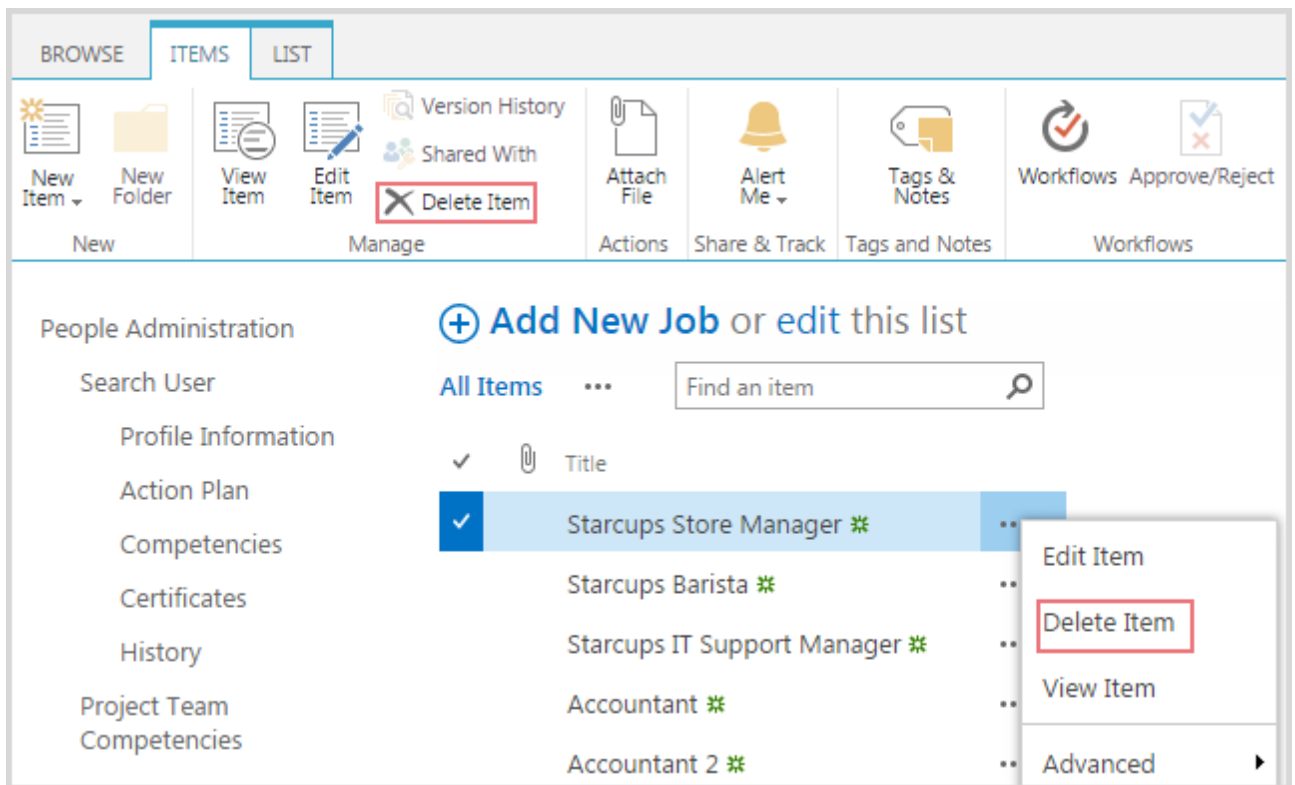
To remove the Job from the Jobs list, the Global Administrator should follow the steps below:

1) Click Delete Item either

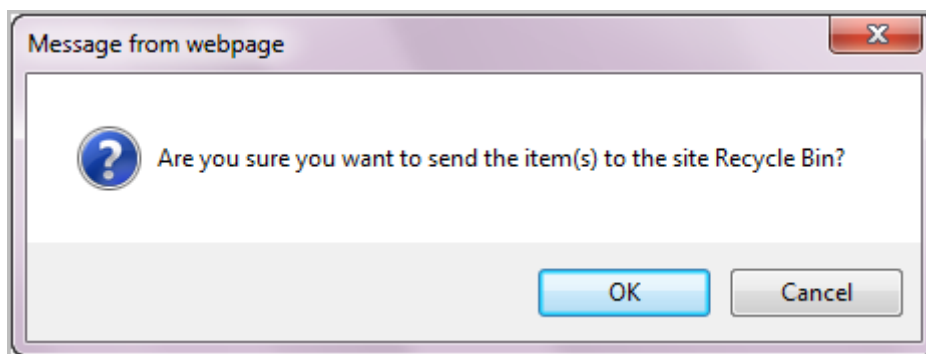
a. From the drop-down action list next to the Job's name

OR

b. From the ribbon (Items > Delete Item) after clicking on the Job to select it in the Jobs list



2) The system asks the user to confirm the decision to permanently remove the selected Job:



3) The user clicks OK button to confirm the decision or Cancel button to discard the process.

The user is redirected back to the Jobs list where the removed Job is no longer displayed.

- NOTE:**
- Upon delete action, Job is removed from the Job Families "Jobs" list that it belonged to.
 - Cannot delete the Job if it is assigned as the only Job to the Employee.

4.7 Job Families


The Global Administrator defines the Job Families with full administrative control to search, modify and delete. He can assign one or more Jobs to each Job Family. The Job Families are stored in the list that can be accessed by following the steps below:

- 1) Choose Job Families link from the Common Tools in the left side menu on the Home page
The system will redirect the user to the page with the list of all Job Families:



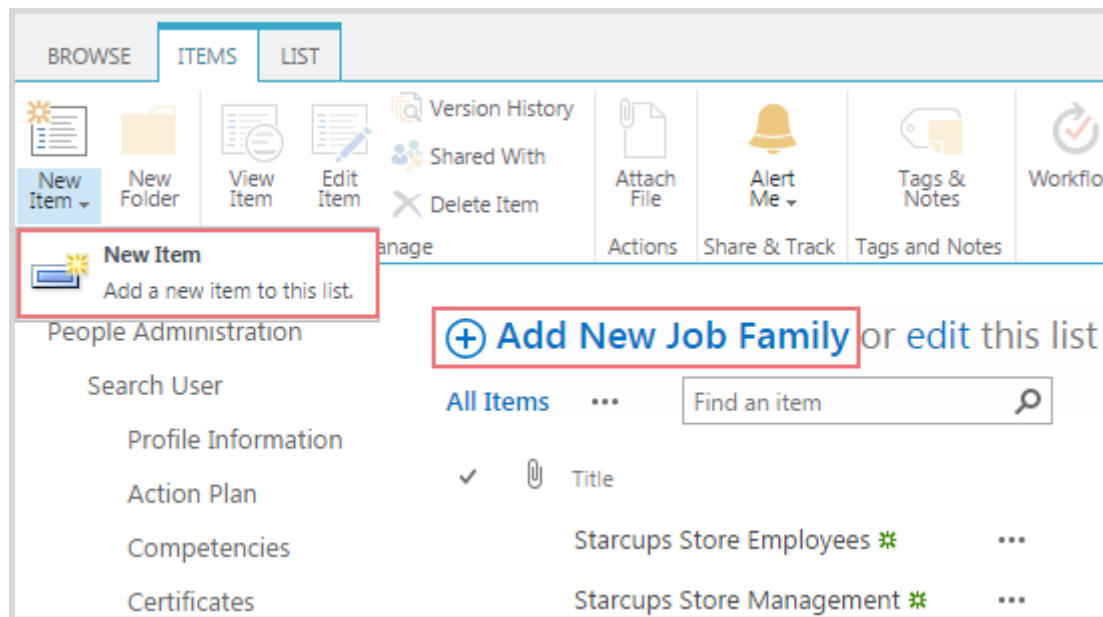
4.7.1 Add Job Family

In order to add the new Job Family, Global Administrator should follow the steps below:

- 1) To open Add New Item form use either one of the options below:
 - a. From the Job Families list click Add New New Job Family button ;

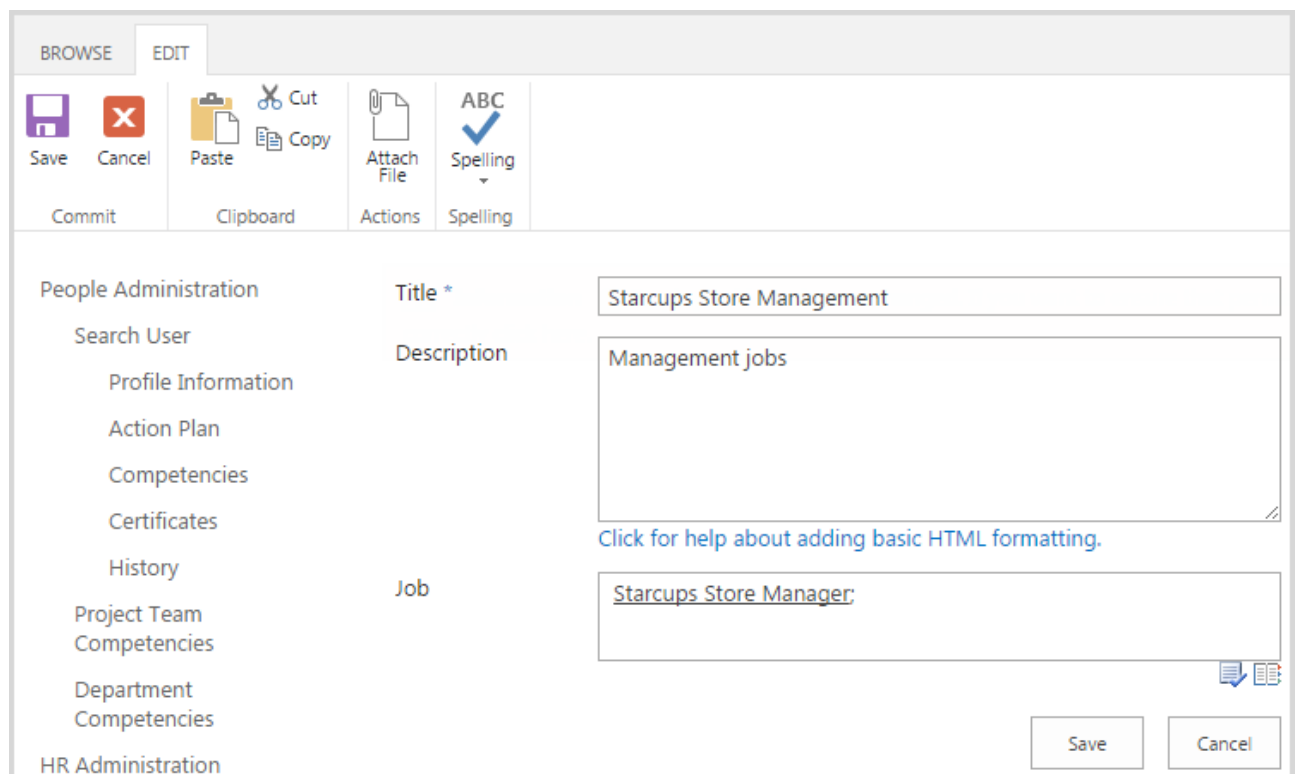
OR

- b. On the ribbon go to Items > New Item:



2) Fill out the Job Family – New item form:

- Title – enter the name for the new Job Family;
- Description – optionally enter the short description for the new Job Family;
- Job – Add all the Jobs that belong to the new Job Family using the Check Names or Browse buttons:



3) Click Save button to add new Job Family to the list or click Cancel button to discard the process.

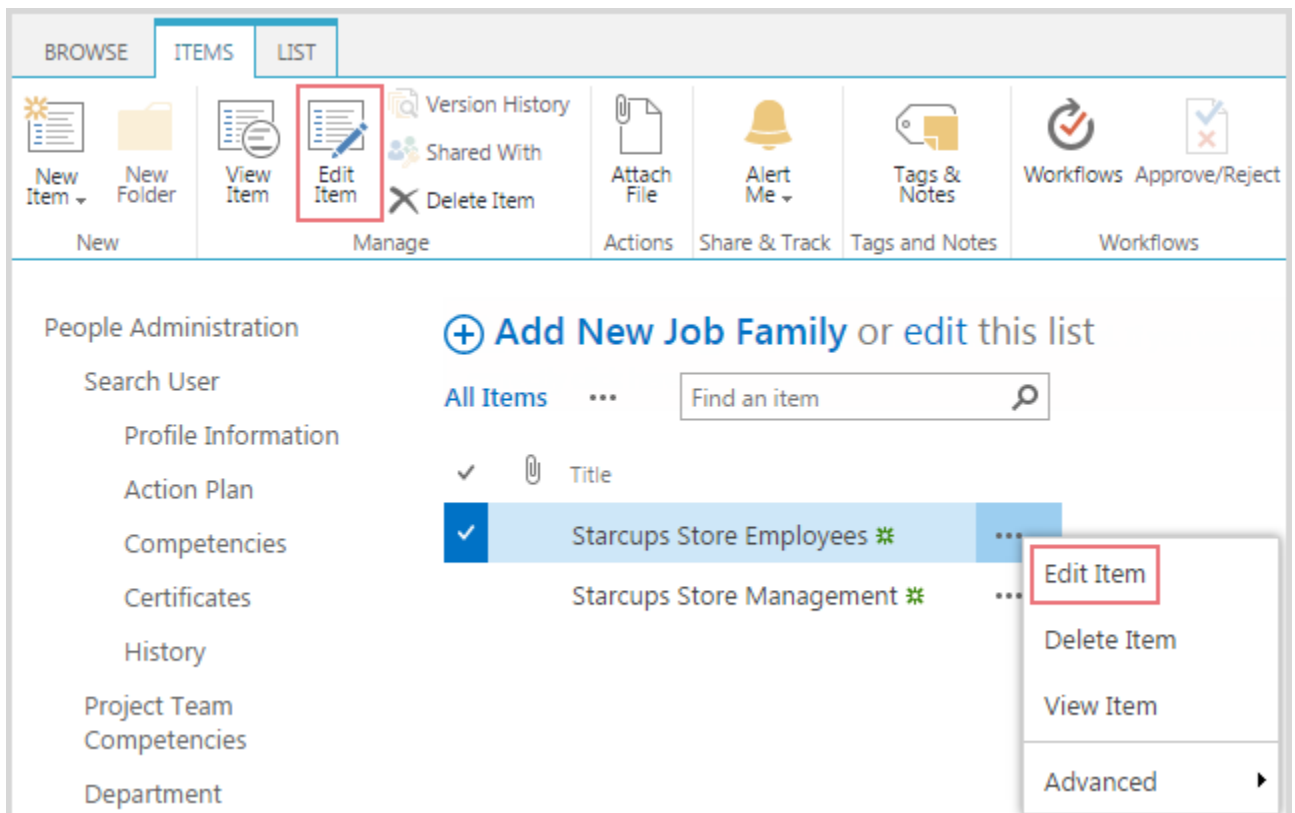
4.7.2 Edit Job Family

To edit the Job Family, the Global Administrator should follow the steps below:

- 1) Open the Edit form via one of the ways described below:
 - a. Click on the Job Family to select it and from the ribbon choose Edit Item in the Items tab;

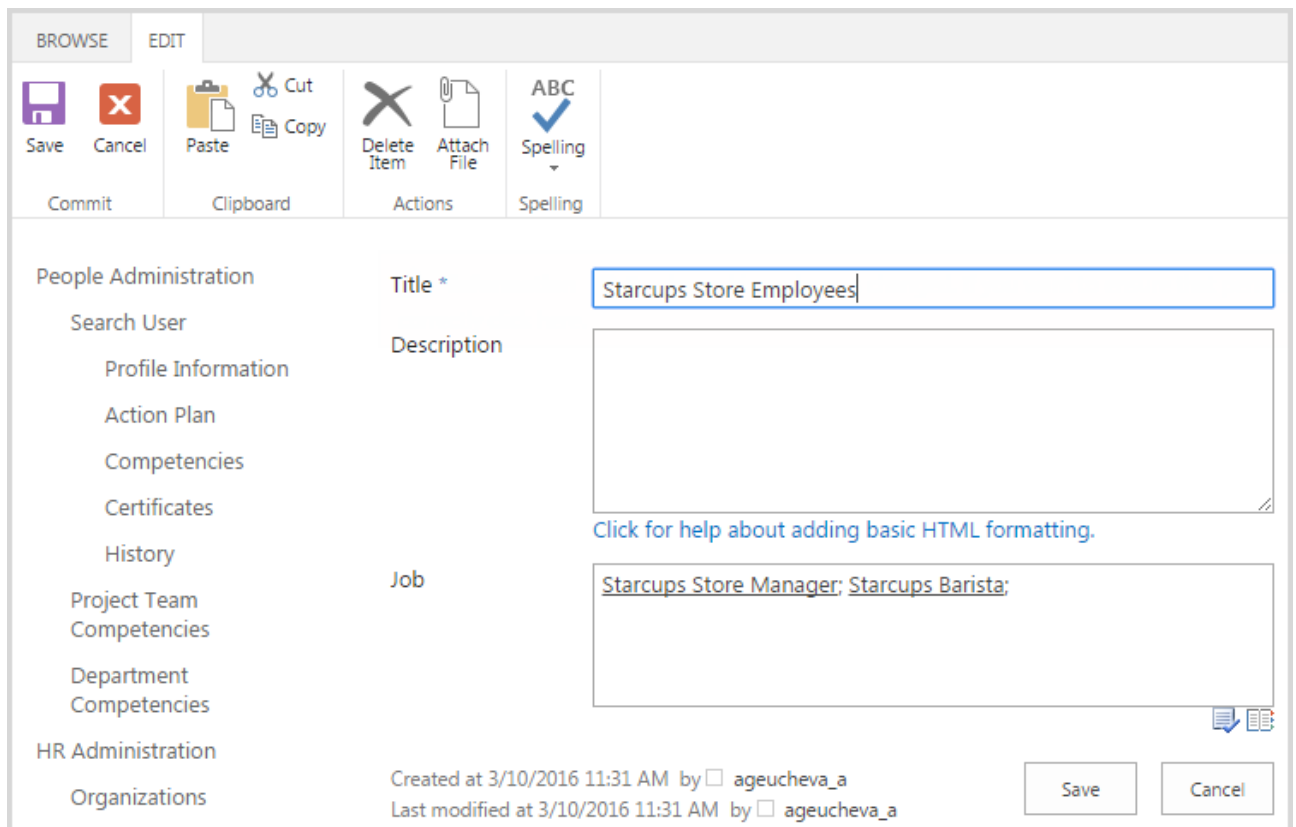
OR

- b. From the drop-down action list next to the Job Family's name select Edit Item action:



The screenshot displays the LMS365 interface. At the top, there are three tabs: 'BROWSE', 'ITEMS', and 'LIST'. The 'ITEMS' tab is active. Below the tabs is a ribbon with various icons and labels. The 'Edit Item' icon, which shows a document with a pencil, is highlighted with a red box. Below the ribbon, the main content area shows a list of Job Families. The first item, 'Starcups Store Employees', is selected and highlighted in blue. A dropdown menu is open next to it, and the 'Edit Item' option is highlighted with a red box. Other options in the dropdown include 'Delete Item', 'View Item', and 'Advanced'.

- 2) Make the necessary changes to the selected Job Family's metadata fields:



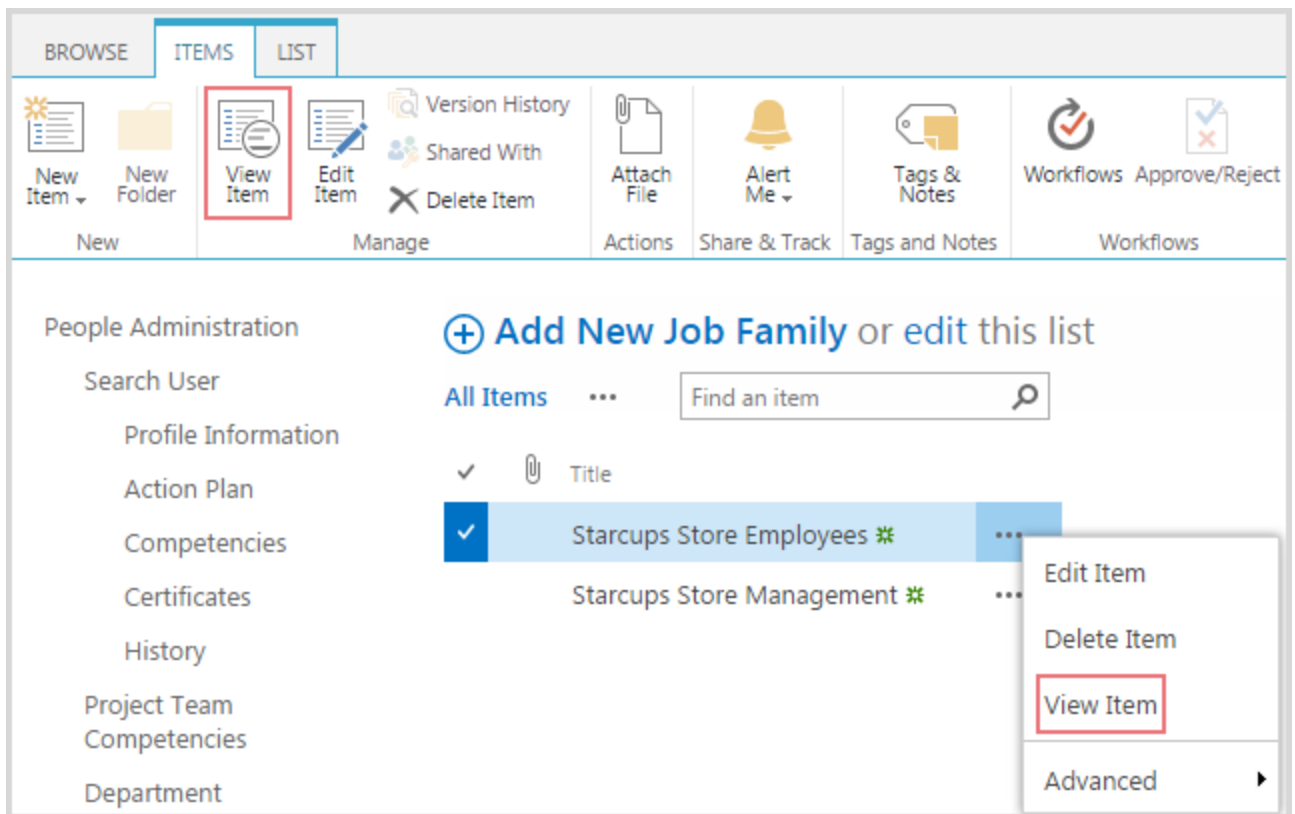
The screenshot shows the 'EDIT' ribbon with the following groups: Commit (Save, Cancel), Clipboard (Paste, Cut, Copy), Actions (Delete Item, Attach File), and Spelling (ABC, Spelling). The form contains a left-hand navigation menu with 'People Administration' (Search User, Profile Information, Action Plan, Competencies, Certificates, History, Project Team, Competencies, Department, Competencies) and 'HR Administration' (Organizations). The main form fields are: 'Title *' with the value 'Starcups Store Employees'; 'Description' with a large text area containing a link to help about adding basic HTML formatting; and 'Job' with the value 'Starcups Store Manager; Starcups Barista;'. At the bottom, it shows 'Created at 3/10/2016 11:31 AM by ageucheveva_a' and 'Last modified at 3/10/2016 11:31 AM by ageucheveva_a', along with 'Save' and 'Cancel' buttons.

- 3) Click Save button to save the changes made to the Job Family or click the Cancel button to discard the process.

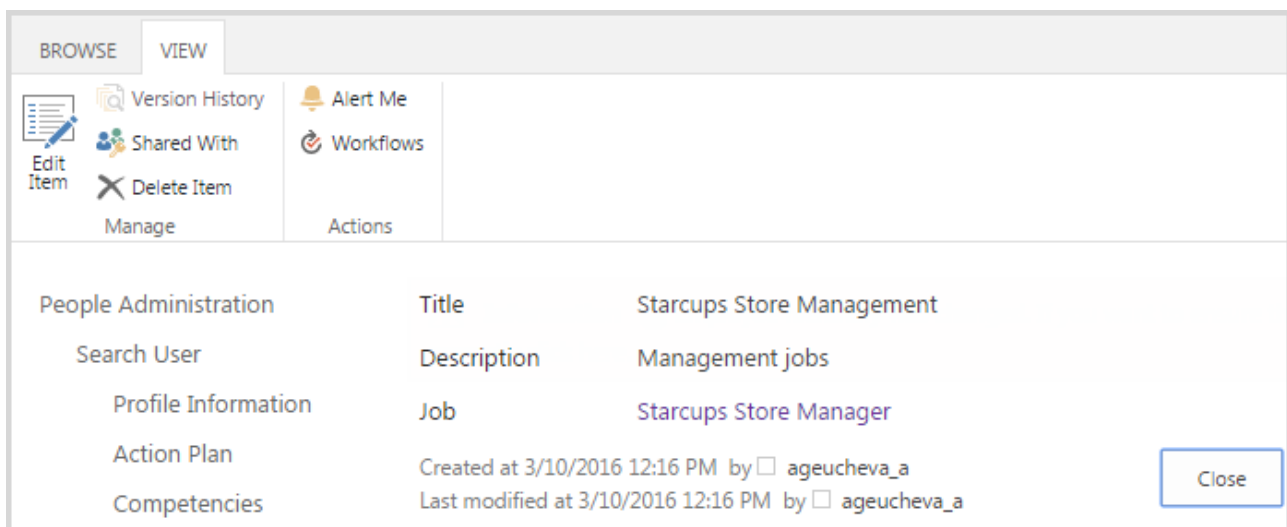
4.7.3 View Job Family's details

To view the detailed information about the Job Family, the user should follow the following steps:

- 1) Click View Item either from the ribbon (Items > View Item) or from the drop-down action list next to the Job Family's name:



The system will display the form with all the details pertaining to the selected Job Family such as Title, Description and Jobs that has been mapped to the Job Family:



Note, please, that the user can choose the view the details of items in Job list by clicking on the Job's title in the Job field of the form above. Refer to the [View Job's details](#) section for more information about this option.

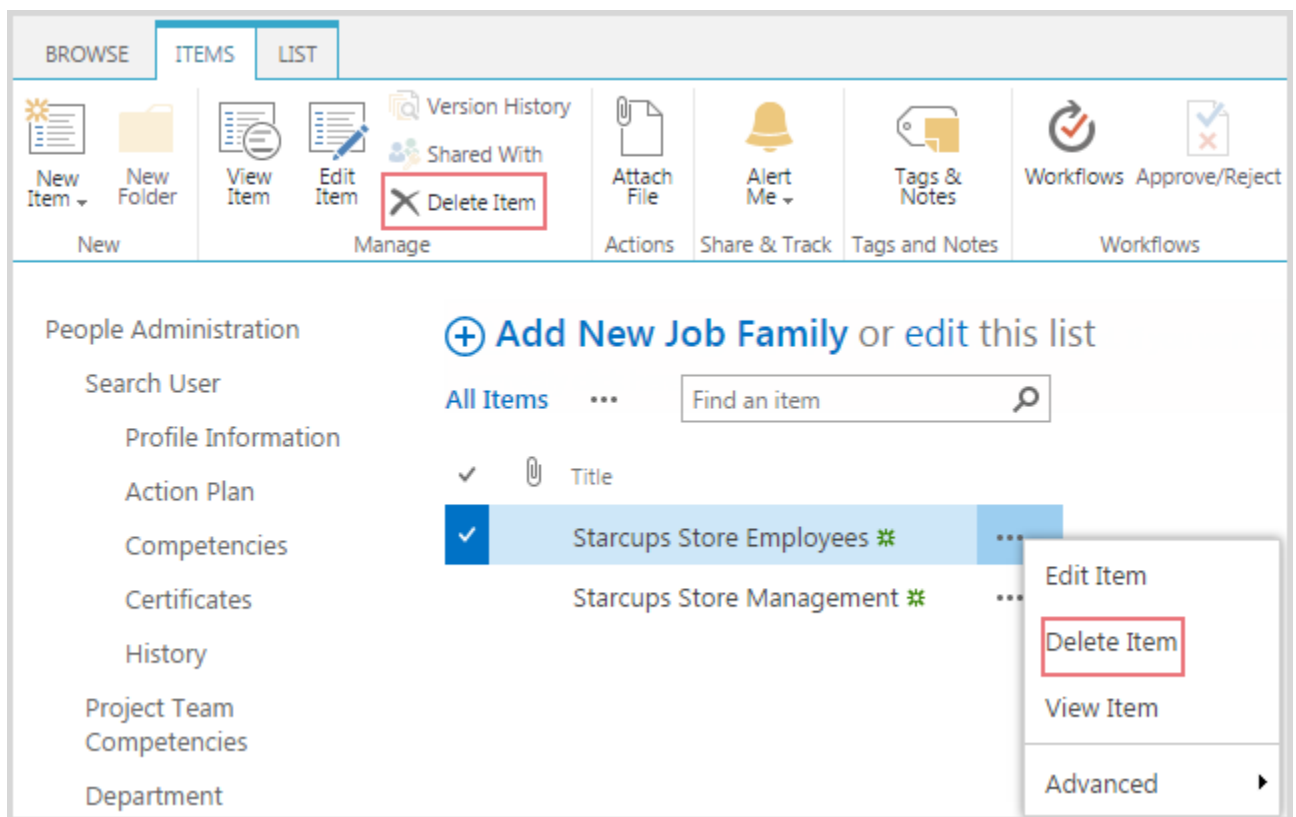
4.7.4 Delete Job Family

To remove the Job Family from the Job Families list, the Global Administrator should follow the steps below:

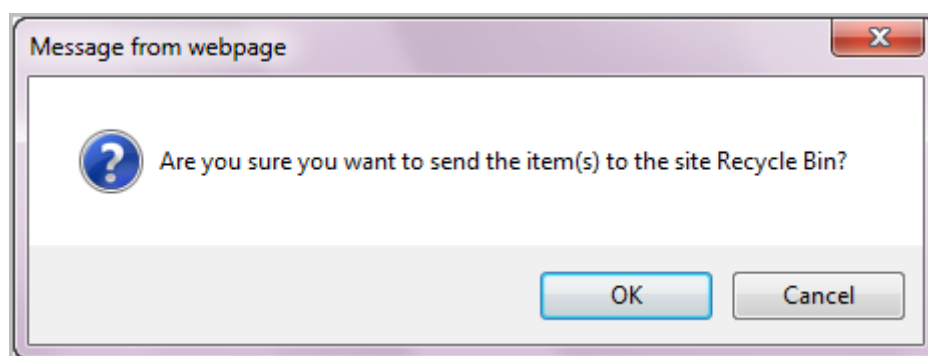
- 1) Click Delete Item either:
 - a. From the drop-down action list next to the Job family's name;

OR

- b. From the ribbon (Items > Delete Item) after clicking on the Job Family to select it in the Job Families list:



- 2) The system asks the user to confirm the decision to permanently remove the selected Job Family:



- 3) The user clicks OK button to confirm the decision or Cancel button to discard the process.

The user is redirected back to the Job Families list where the removed Job Family is no longer displayed.

- NOTE:**
- Job Family deletion is processed according to the OOTB SharePoint rules for deleting records
 - When Job Family is deleted, all Jobs belonging to this Job Family are not deleted but this Job Family is removed from their "Job Family" field

4.8 Project Teams

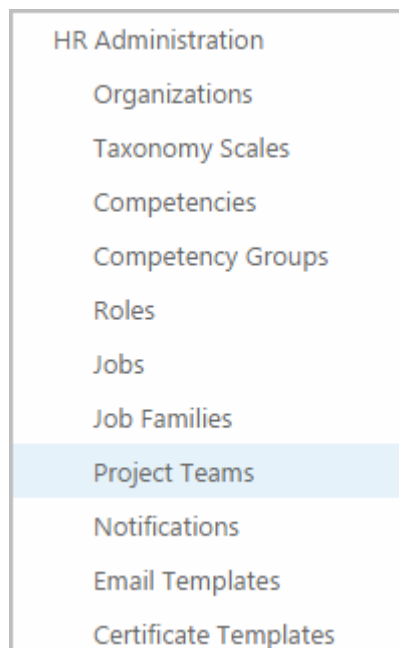
The Project Team Management offers an easy way to manage Project Team Profiles and assess project teams' proficiency levels with the help of gap analysis.

Global Administrator has full administrative control to define the Project Team profile structure.

People Administrator has full administrative control to manage Project Team Profiles for the project teams.

Project Team Leader has limited administrative control to manage the Project Team Profiles of the project teams: he has permission to add/delete project team members and assess project team competency gap.

To view the list of all Project Teams, the User clicks on Project Teams link in the Quick Launch menu in HR Administration:



The system will redirect you to the Project Teams page, where they are listed:

BROWSE PROJECT TEAM TOOLS SHARE FOLLOW

LMS365 On-Premises CCM ▸ Project Teams ⓘ

People Administration	Title	Description
Search User	PowerObjects	PowerObjects Training Department
Profile Information		
Action Plan	Starcups Team	
Competencies	Team Subaru Canada	

Click on the Project Team's title to go to the selected Project Team's Home page and that Project Team is selected in the Project Team Details web part:

LMS365 On-Premises Starcups Team

People Administration

- Search User
- Profile Information
- Action Plan
- Competencies
- Certificates
- History
- Project Team
- Competencies
- Department
- Competencies

HR Administration

- Organizations
- Taxonomy Scales
- Competencies
- Competency Groups
- Roles
- Jobs
- Job Families
- Project Teams
- Notifications
- Email Templates
- Personal Profiles
- Relationships

Announcements

- Reports
- Generated Reports

Announcements

There are no items to display

My Project Teams

- [PowerObjects](#)
- [Starcups Team](#)
- [Team Subaru Canada](#)

Project Team Details

Project Team: [Starcups Team](#)

Starcups Team

[Additional info](#)

Surveys

There are no items to display

My Competencies

User: [ageucheva_a](#)

Competency Level	Value	Comments
Communication-Outstanding	5	
English-Spoken-Outstanding	5	
Accounting-Above Average	4	
Advanced Barista Skill-Experienced	2	
Business Conduct-Above Average	4	

[Manage user competencies](#)


Action Plan

User: [ageucheva_a](#)

Suggested Item	Is Acquired
Competencies	
English-Spoken-Above Average	✓
Business Conduct-Above Average	✓
Communication-Above Average	✓
Roles	
Starcups Store Manager	✗

[Manage action plan](#)

My Profile


[ageucheva_a](#)

[Additional info](#)

4.8.1 Create Project Team

To create a new Project Team, follow these steps:

- 1) On the ribbon menu, go to Project Team Tools and click Create Project Team button:

BROWSE PROJECT TEAM TOOLS SHARE FOLLOW

Create Project Team Import From CSV

New

People Administration	Title	Description
Search User	PowerObjects	PowerObjects Training Department
Profile Information		
Action Plan	Starcups Team	

2) The following window will appear:

Create Project Team ⓘ

Title and Description
Type a title and description for your new site. The title will be displayed on each page in the site.

Title:

Description:

Web Site Address
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.

For example, <https://demo2013-test.elearningforce.com/ccm/sitename>

URL name:

Project Team Leaders
Displays project team leaders with profile

User Name:

Project Team Members
Displays members with profile

User Name:

Language
Specify the language for this Web site collection

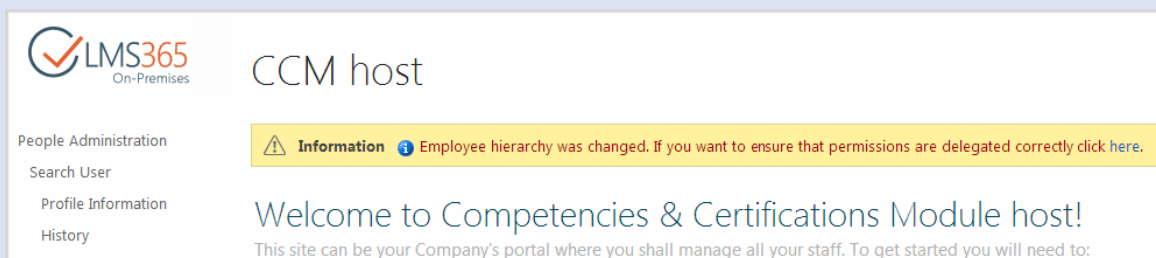
Select a language:

3) Fill in all the necessary information about the new Project Team:

- Title – name of the new Project Team that will be displayed on each page within the site;
- Description – short description of the new Project Team;

- Web Site Address – the users will navigate directly to the Home page of the new Project Team by typing this URL address directly into their browser. Keep the url short and easy to remember;
 - Project Team Leaders – with the help of user picker choose the Project Team Leaders for the new Project Team;
 - Project Team Members – with the help of user picker choose the members of the new Project Team;
 - Language – specify Language to be used within the new Project Team.
- 4) Click Create button to save the changes OR click Cancel button to discard the changes. You will be redirected to Announcement page with the information about the newly created Project Team.

NOTE: After you create a new Project Team, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:



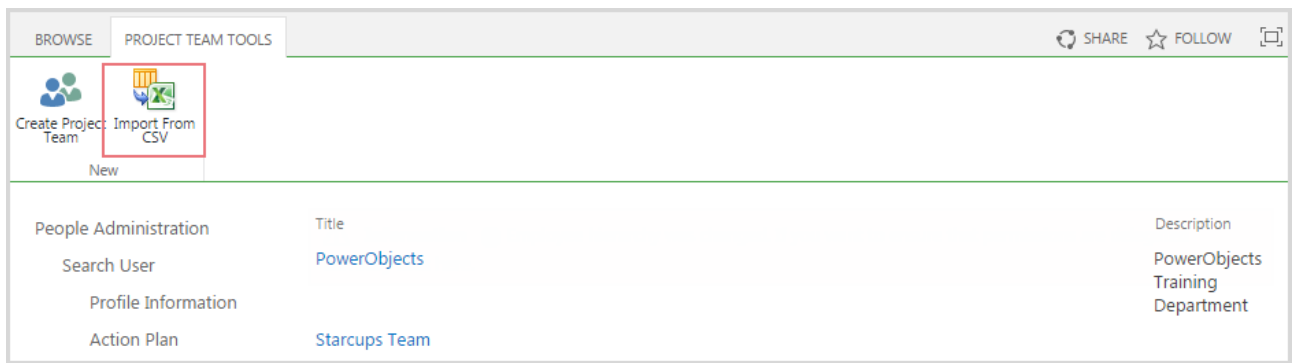
Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.8.2 Import Project Team

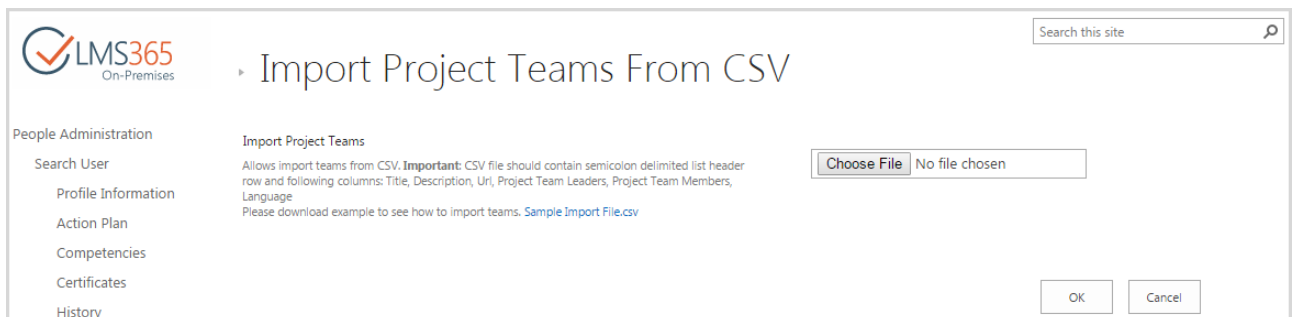
It is possible to import data from .csv file for the Project Team item. The process of importing Project Team is described below:

Import from .csv is designed for filling Project Teams information and can be used for bulk import of Project Teams. To import a Project Team, do the following actions:

- 1) Enter the Project Teams list and click the Import from CSV button in the Project Team Tools in the ribbon menu:

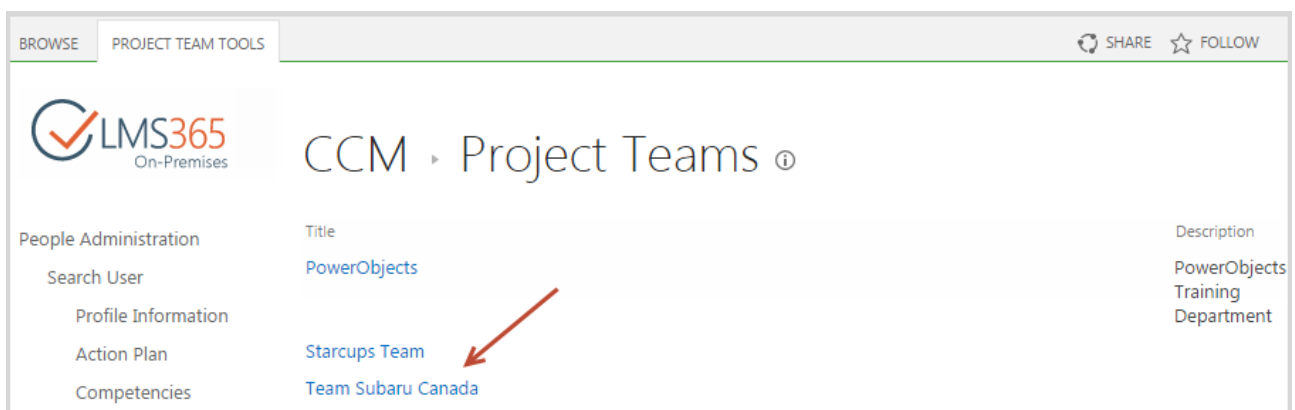


2) Select a .csv file from your computer for upload:



NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

3) Click OK to confirm import. The imported Job will be added to the list:



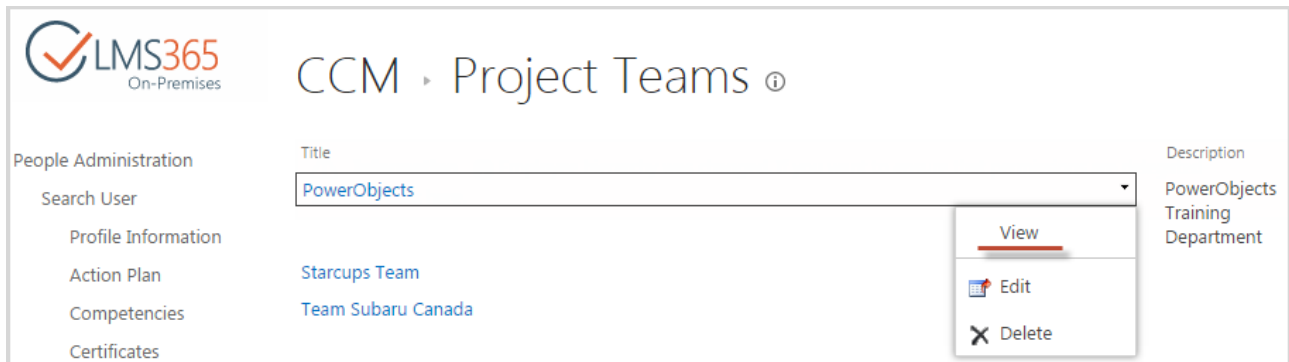
NOTE: If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Project Team with incorrect data will be not uploaded and error will be displayed at the end of action.

NOTE: If imported Project Team duplicates title of already existing one, a warning about item with duplicating title will be displayed.

4.8.3 View Project Team's metadata

To view the Project Team details, follow these steps:

- 1) On the Project Teams Home page choose the Project Team you want to view and click on the Actions drop-down menu against the project team's title;
- 2) Choose View action:



You will be redirected to Display Project Team Details page:

Project Teams ▸ Display Project Team Details ⓘ

Title and Description

Title:
Peter's Barista Team
Description:
Team managed by Store Manager, Peter Bishop

Web Site Address

<https://demo2013-test.elearningforce.com/ccm/hollywood>

Project Team Leaders

Displays project team leaders with profile

Lars Vestergaard
Peter Bishop

Project Team Members

Displays members with profile

Hank Moody
Olivia Dunham
Peter Bishop

Held Required All

Title	Project Team Level	Required	GAP
General Employee Competencies			
Coffee-making	1 2	1	0
Business Conduct	1 2 3 4 5	Not Present	Not Present
Company and Product Knowledge	1 2	1	0
Advanced Barista Skill	1 2 3 4 5	Not Present	Not Present
IT and Collaboration Technology			
Starbucks IT and collaboration Systems	1 2	1	0
Leadership and Management			
Creativity - Innovation	1 2 3	Not Present	Not Present
Customer Focus	1 2	1	0

Hank Moody ▼

Olivia Dunham ▼

Peter Bishop ▼

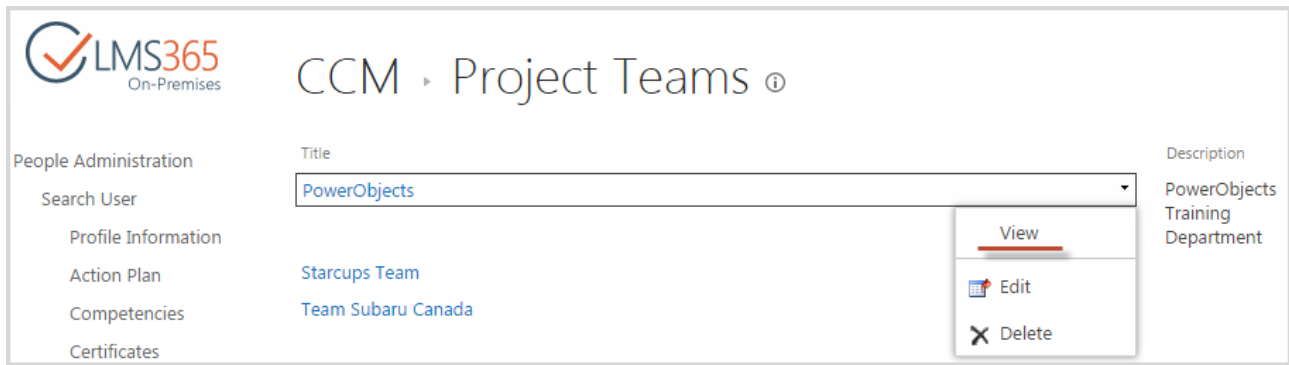
Close

- a. User can view the user details of the Project Team Leaders and Project Team Members by clicking on their user names
 - b. User can view the Project Team Competencies details and view the Competencies of each Project Team Member that pertain to Project Team Competencies. Refer to [section View Project Team Competencies](#) on more details how to view the Project Team Competencies.
- 3) Click Cancel button to go back to Project Teams page.

4.8.4 Edit Project Team's metadata

To modify the Project Team's metadata, the User goes through the following steps:

- 1) On the Project Teams Home page choose the Project Team and click on the Actions drop-down menu next to its Title;
- 2) Choose Edit action:



LMS365 On-Premises CCM ▸ Project Teams ⓘ

People Administration

Search User: ▼

Profile Information: [Starcups Team](#)

Action Plan: [Team Subaru Canada](#)

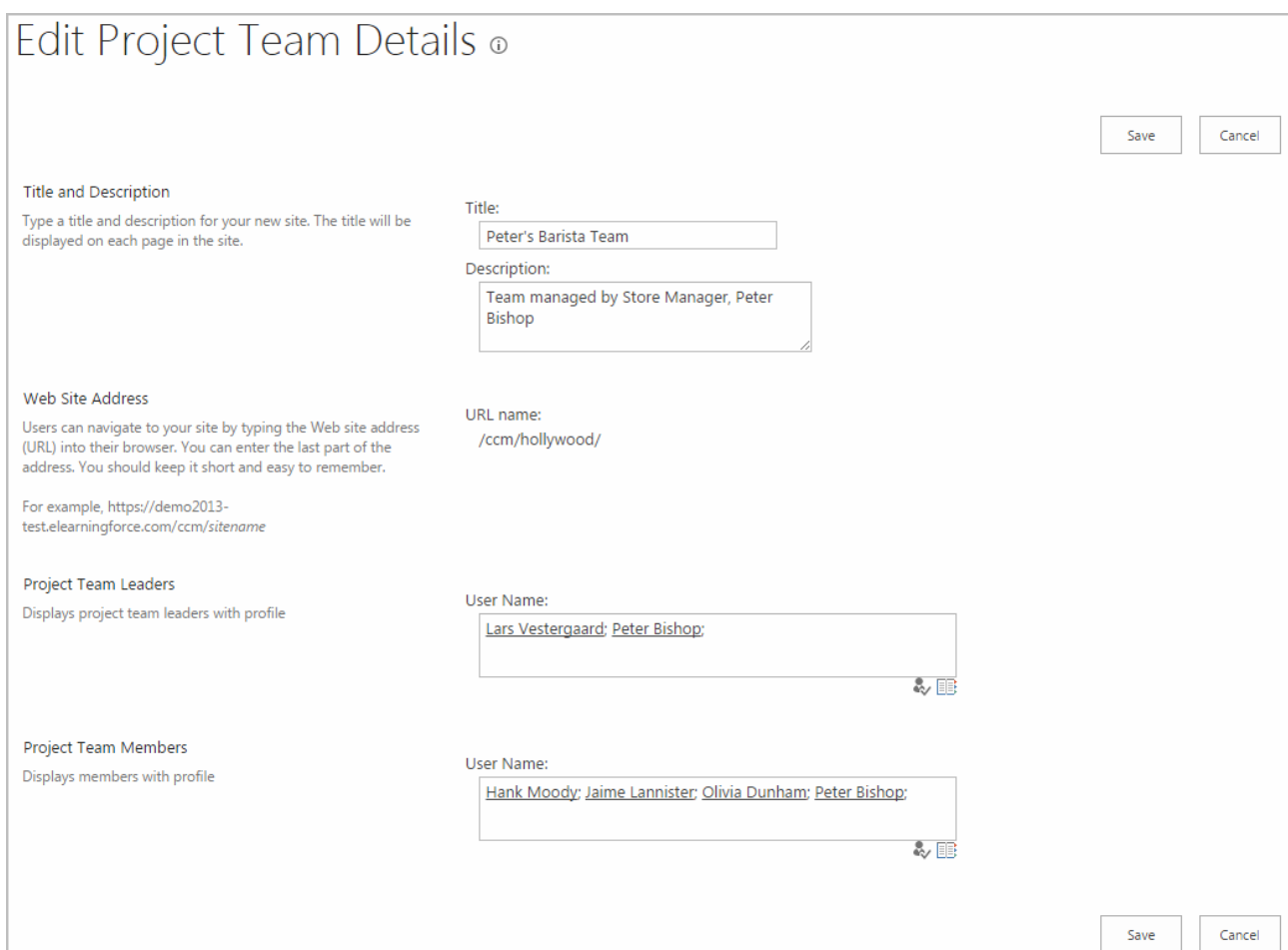
Competencies

Certificates

Description: PowerObjects Training Department

View
Edit
Delete

You will be redirected to the Edit Project Team page:



Edit Project Team Details ⓘ

Save Cancel

Title and Description
Type a title and description for your new site. The title will be displayed on each page in the site.

Title:

Description:

Web Site Address
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.
For example, <https://demo2013-test.elearningforce.com/ccm/sitename>

URL name:

Project Team Leaders
Displays project team leaders with profile

User Name:

Project Team Members
Displays members with profile

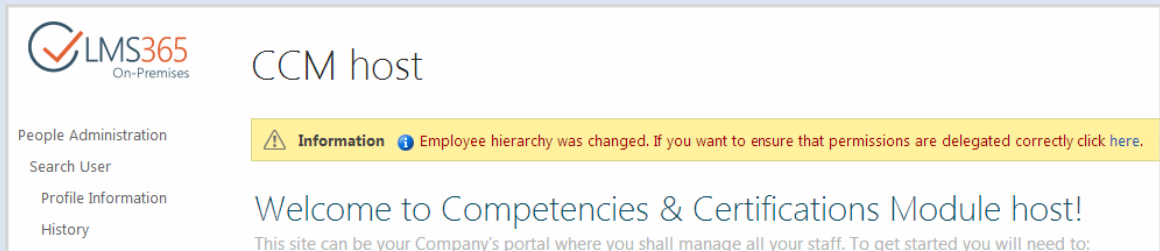
User Name:

Save Cancel

- Title – edit the name of the Project Team that will be displayed on each page within the site;
- Description – make changes to the Description of the Project Team;
- Project Team Leaders – add new or remove the user name from the list of Project Team Leaders;
- Project Team Members – add new or remove the user name from the list of Project Team Members.

3) Click Save button to save the changes OR click Cancel to discard the process.

NOTE: After you edit Project Team Members, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:

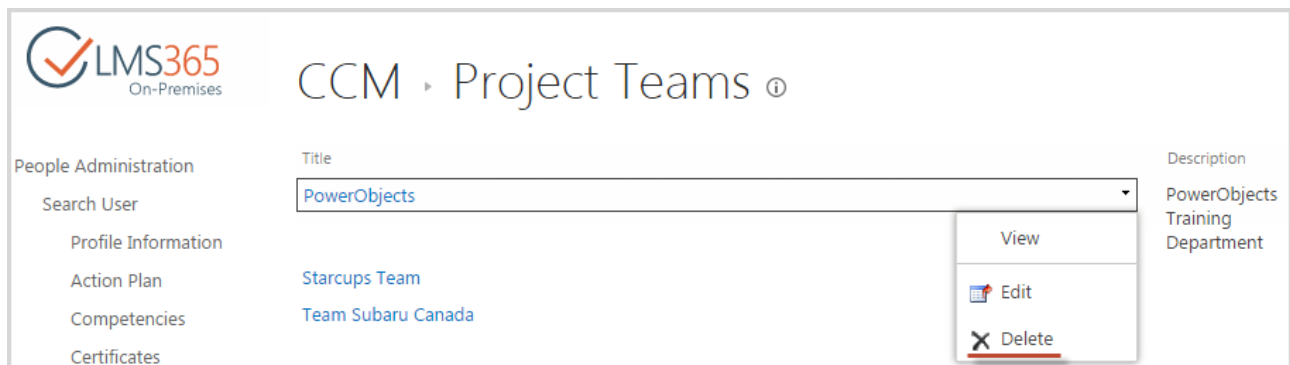


Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.8.5 Delete Project Team

To delete the Project Team, follow these steps:

- 1) On the Project Teams Home page choose the Project Team and click on the Actions drop-down menu next to its Title;
- 2) Choose Delete action:



You will be redirected to the Delete Project Team page:

Delete Project Team ?

Title and Description
 Type a title and description for your new site. The title will be displayed on each page in the site.

Title:
Peter's Barista Team

Description:
Team managed by Store Manager, Peter Bishop

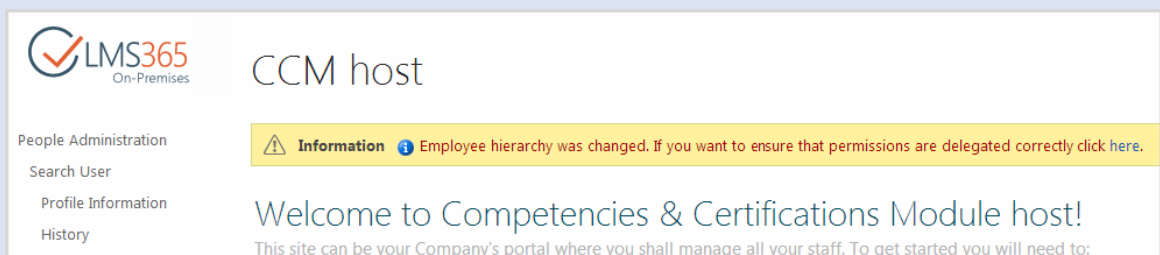
Web Site Address
 Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.

URL name:
/ccm/hollywood/

For example, <https://demo2013-test.elearningforce.com/ccm/sitename>

- 3) Click Delete button to remove the Project Team or click Cancel button to discard the changes.

NOTE: After you delete a Project Team, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:



Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.9 Notifications Management

The system tracks changes in Personal Competencies, Personal Certifications and Action Plan of each employee and sends email notifications for respective changes to the designated users.

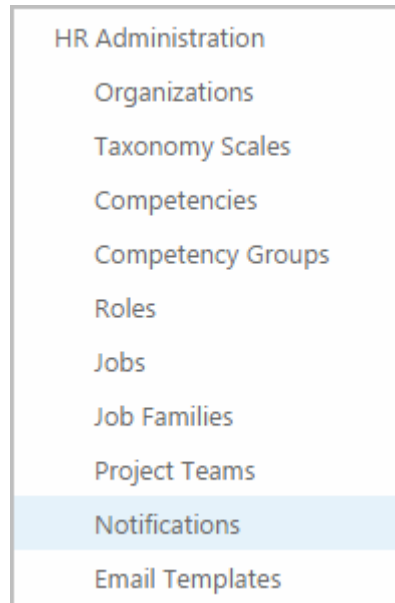
SharePoint CCM provides an ability to set Notifications on the Certification instance events (certification issued, certification is about to be expired, certification expired, and certification suspended) which defines what Email Templates will be sent to what managers from employee's subordination hierarchy.

The Global Administrator has full administrative control to add, edit, and delete Notification Rules.

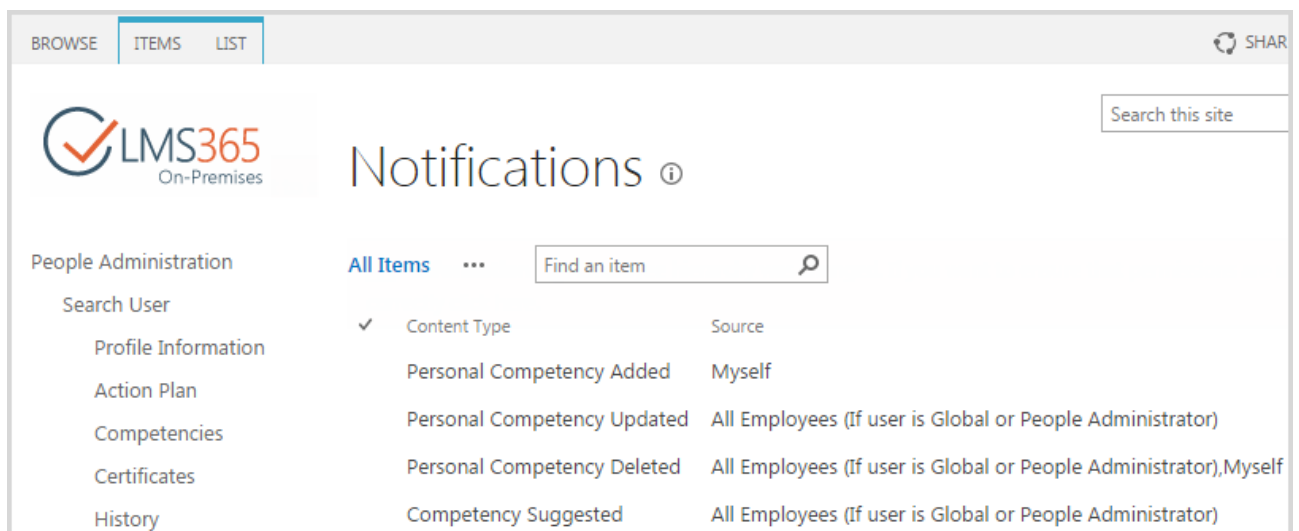
4.9.1 Add Notification

To add a new Notification, follow these steps:

- 1) On the Quick Launch menu in HR Administration section click Notifications:













- 2) You will be redirected to Notifications list. The Notifications will be sorted by Content Type and Source:



- 3) From the ribbon menu Items choose New Item and specify Content Type:

BROWSE ITEMS LIST

 New Item ▾
  New Folder
  View Item
  Edit Item
  Delete Item
  Version History
  Shared With
  Attach File
  Alert Me ▾
  Tags & Notes

Actions | Share & Track | Tags and Notes

ms ... Find an item

Content Type	Source
Personal Competency Added	All Emplo
Personal Competency Updated	All Emplo
Personal Competency Deleted	All Emplo
Competency Suggested	All Emplo

Personal Competency Added
Subscribe to event 'Personal Competency Added'.

Personal Competency Deleted
Subscribe to event 'Personal Competency Deleted'.

Personal Competency Updated
Subscribe to event 'Personal Competency Updated'.

Competency Suggested
Subscribe to event 'Competency Suggested'.

Role Suggested
Subscribe to event 'Role Suggested'.

Personal Job Added
Subscribe to event 'Personal Job Added'.

Personal Job Deleted
Subscribe to event 'Personal Job Deleted'.

Certification Granted
Subscribe to event 'Certification Granted'.

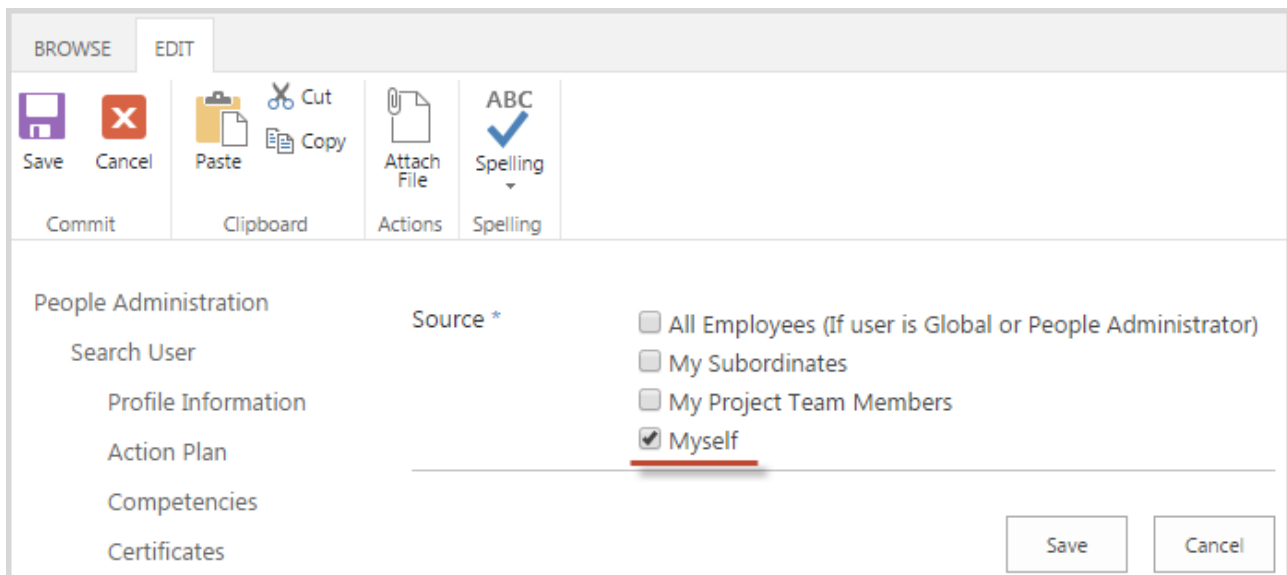
Certification About To Expire
Subscribe to event 'Certification About To Expire'.

Certification Expired
Subscribe to event 'Certification Expired'.

Certification Suspended
Subscribe to event 'Certification Suspended'.

Action Plan Overdue
Subscribe to event 'Action Plan Overdue'.

4) In the Notifications - New Item form choose the Source for the Notification (check the box):

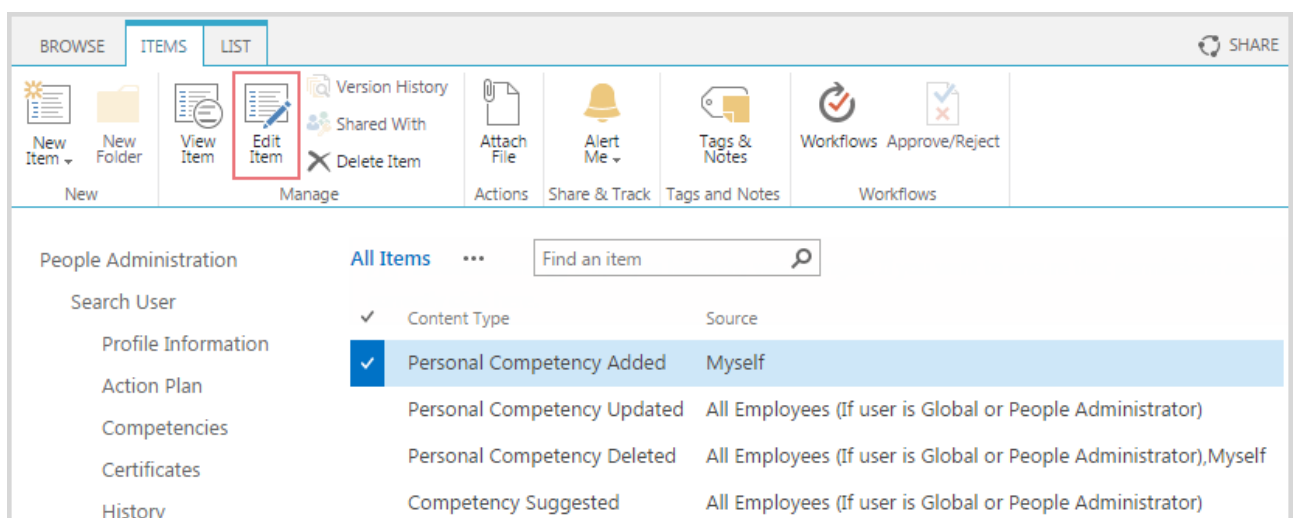


5) Click Save button to create a new Notification or click Cancel button to discard the changes. You will be redirected to the Notifications list, where newly added Notification will be displayed.

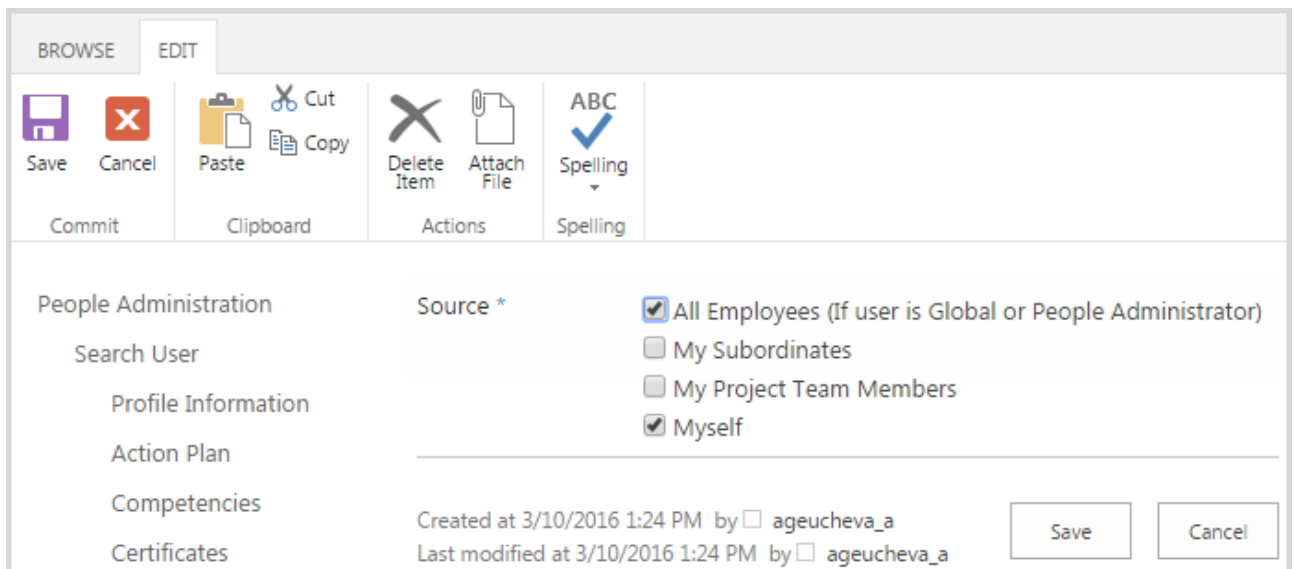
4.9.2 Edit Notification

The User can change the Source for Notification by going through following steps:

- 1) Choose the needed Notification from the Notifications List;
- 2) From the ribbon menu Items choose Edit Item:



- 3) Update the Notification Source in the Edit form:



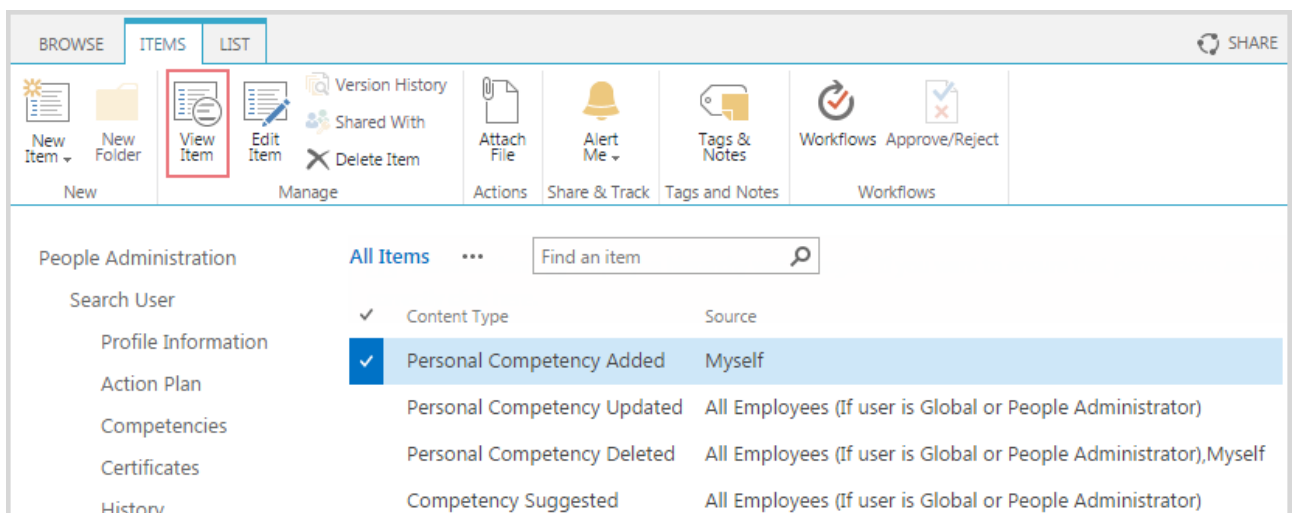
4) Click Save button to save the changes OR click Cancel button to discard the changes.

Note that you can delete the Notification from the Edit Form (see Chapter 4.9.4 [Delete Notification](#) for more information).

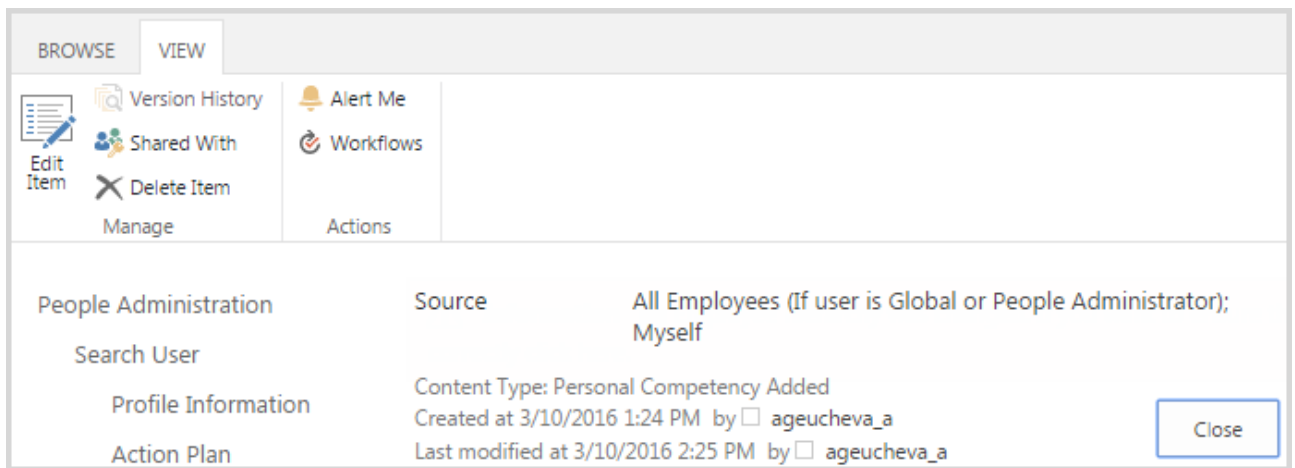
4.9.3 View Notification's metadata

To view the detailed information about the Notification, follow these steps:

- 1) Choose the Notification from the Notifications List;
- 2) From the ribbon menu Items choose View Item:



3) The View form will open with the detailed information about the Notification:



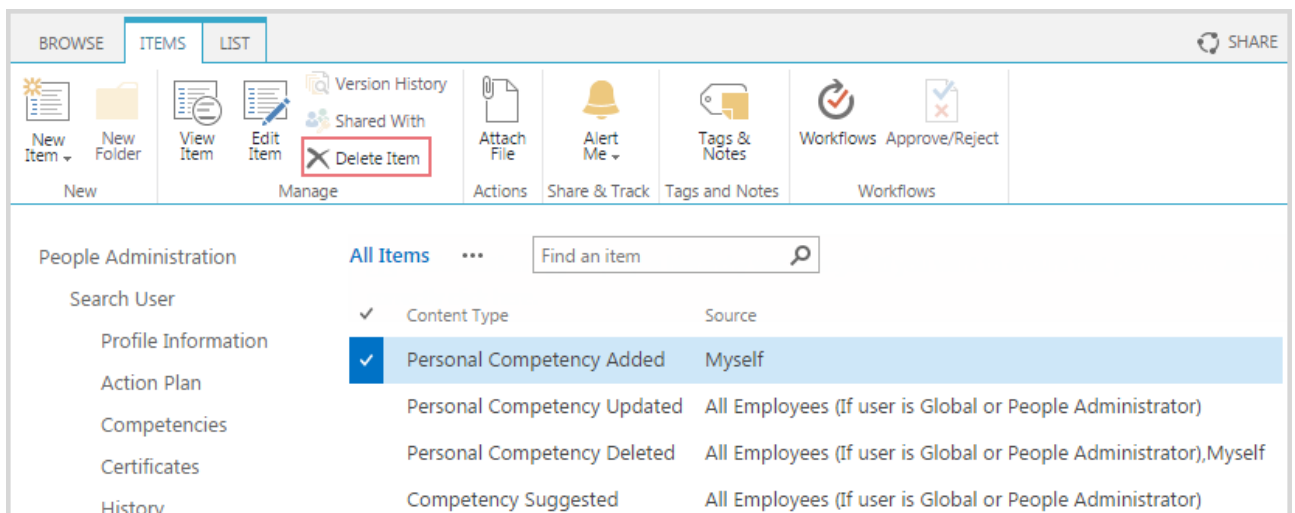
4) Click Close button to close the window and return to the Notifications list.

Note that you can Edit or Delete a Notification from the View form (see Chapters 4.9.2 [Edit Notification](#) and 4.9.4 [Delete Notification](#) respectively for more information).

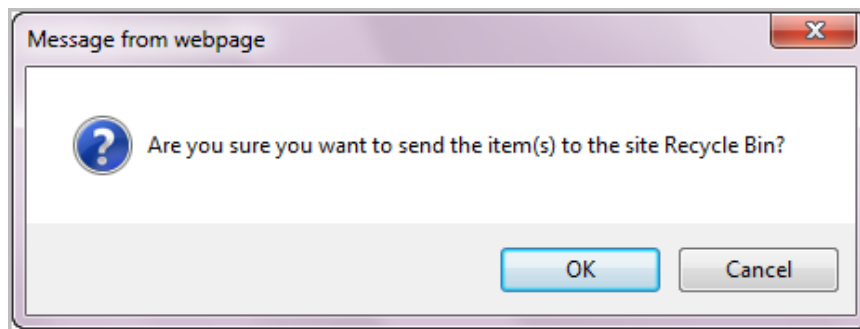
4.9.4 Delete Notification

To remove the Notification, follow these steps:

- 1) Choose the Notification from the Notifications List;
- 2) From the ribbon menu Items choose Delete Item:



- 3) The system will ask you to confirm the decision to remove the notification. Click OK button to delete the notification or click Cancel to discard the changes:



4.10 Email Templates

Email templates for notifications for the following events are predefined by the system:

- a new Competency (Competency Level) was added/modified/deleted;
- a new Competency (Competency Level) was requested by the Employee;
- a new Role was requested by the Employee;
- Requested Competency (Competency Level) was rejected;
- Requested Role was rejected;
- a new Competency (Competency Level) was suggested to Employee;
- a new Role was suggested the Employee.

Email template for notifications for the following events can be customized:

- certification has been granted;
- certification is about to expire;
- certification is expired;
- certification has been suspended.

4.10.1 View Email Templates list

The User can view the list of predefined Email Templates by going through the following steps:

- 1) Click on Message Templates in HP Administration on the left side menu on the Home page:

HR Administration
Organizations
Taxonomy Scales
Competencies
Competency Groups
Roles
Jobs
Job Families
Project Teams
Notifications
Email Templates

You will be redirected to the Message Templates list. The items are sorted by Title, Subject and Body:

Email Templates ⓘ

All Items ⋮ 🔍

✓	📎	Title	Subject	Body
		Personal Competency Added	... A personal competency has been added	<p>Dear {recipient:name},</p> <p>Please be advised that the following Personal Competency has been awarded:</p> <p>Competency: {competency:title}</p> <p>Awarded to: {source:name}</p> <p>Status: {competency:status}</p> <p>Comments: {competency:comments}</p>
		Personal Competency Deleted	... A personal competency has been deleted	<p>Dear {recipient:name},</p> <p>Please be advised that the following Personal Competency has been deleted:</p> <p>Competency: {competency:title}</p> <p>Awarded to: {source:name}</p> <p>Status: {competency:status}</p> <p>Comments: {competency:comments}</p>
		Personal Competency Updated	... A personal competency has been updated	<p>Dear {recipient:name},</p> <p>Please be advised that the following Personal Competency has been updated:</p> <p>Competency: {competency:title}</p> <p>Awarded to: {source:name}</p> <p>Status: {competency:status}</p> <p>Comments: {competency:comments}</p>

On the newly created CCM sites, a link to the REM Dashboard is added to the email templates:

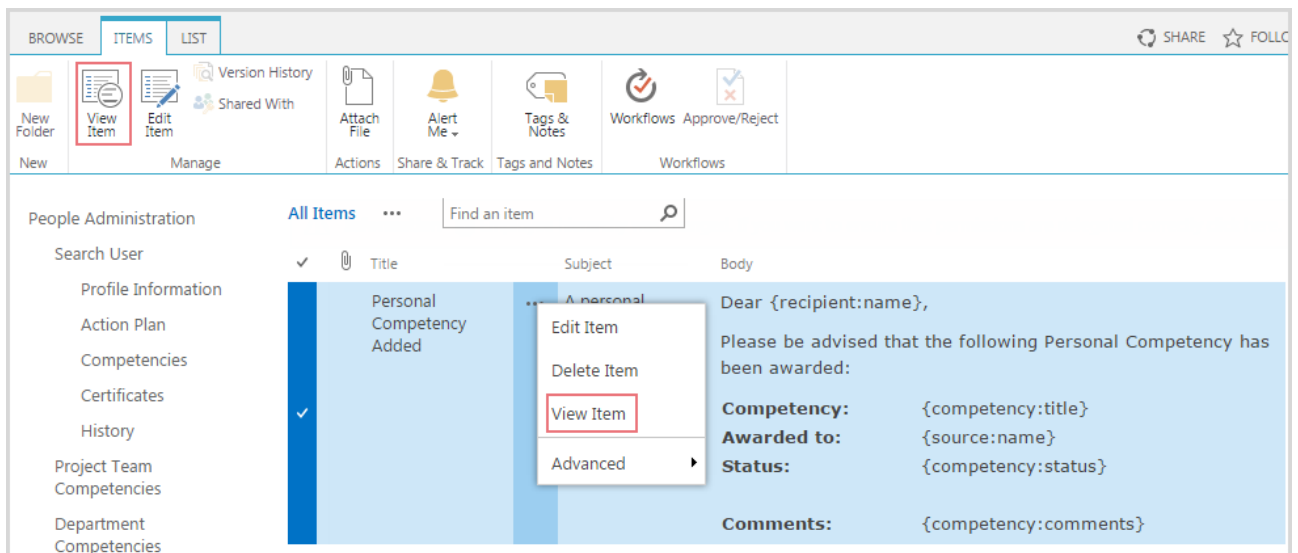
All Items ... Find an item 🔍

✓	📎	Title	Subject	Body
		Personal Competency Added 🌟	... A personal competency has been added	<p>Dear {recipient:name},</p> <p>Please be advised that the following Personal Competency has been awarded:</p> <p>Competency: {competency:title} Awarded to: {source:name} Status: {competency:status}</p> <p>Comments: {competency:comments}</p> <p>Access your training overview via the {dashboard:home_page_link} page.</p>
		Personal Competency Deleted 🌟	... A personal competency has been deleted	<p>Dear {recipient:name},</p> <p>Please be advised that the following Personal Competency has been deleted:</p> <p>Competency: {competency:title} Awarded to: {source:name} Status: {competency:status}</p> <p>Comments: {competency:comments}</p> <p>Access your training overview via the {dashboard:home_page_link} page.</p>

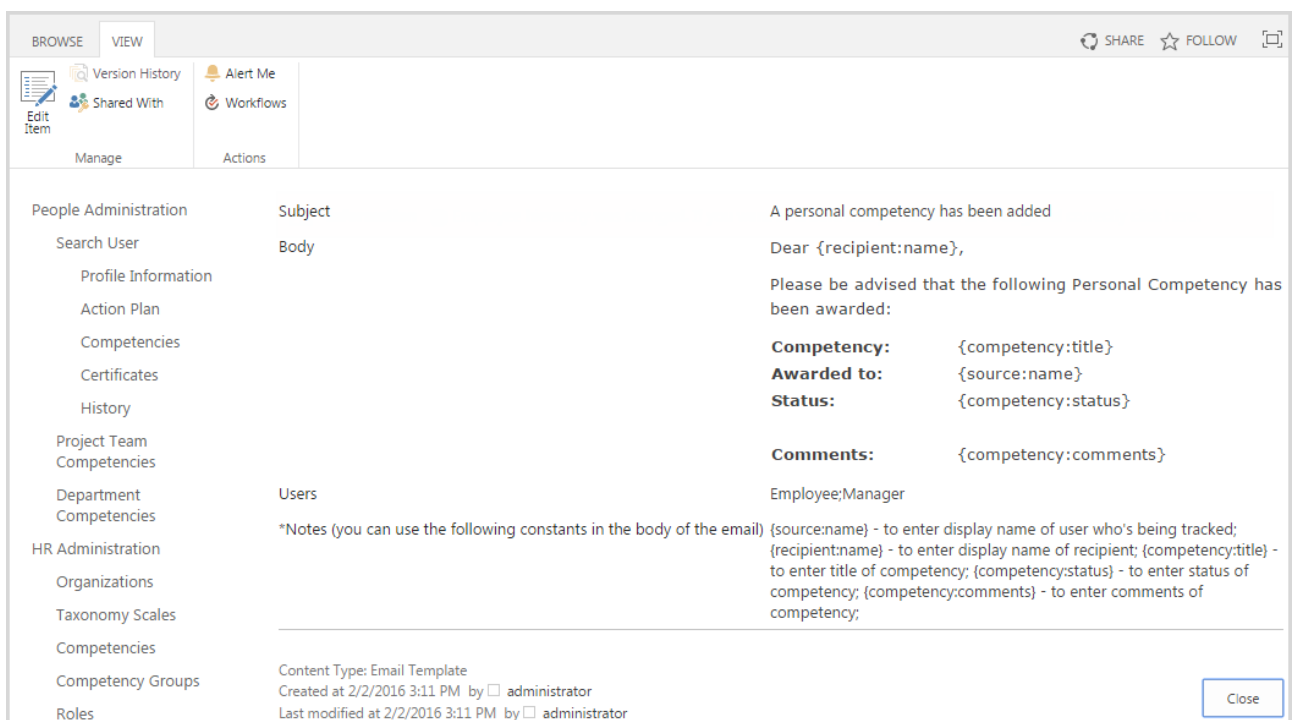
4.10.2 View Message Template's metadata

To change the Message Template, the User follows the steps below:

- 1) Select the needed Message Template from the Message Templates list;
- 2) From the ribbon menu Items or from the drop-down actions choose View Item:



3) The View form will open displaying the Message Template details:



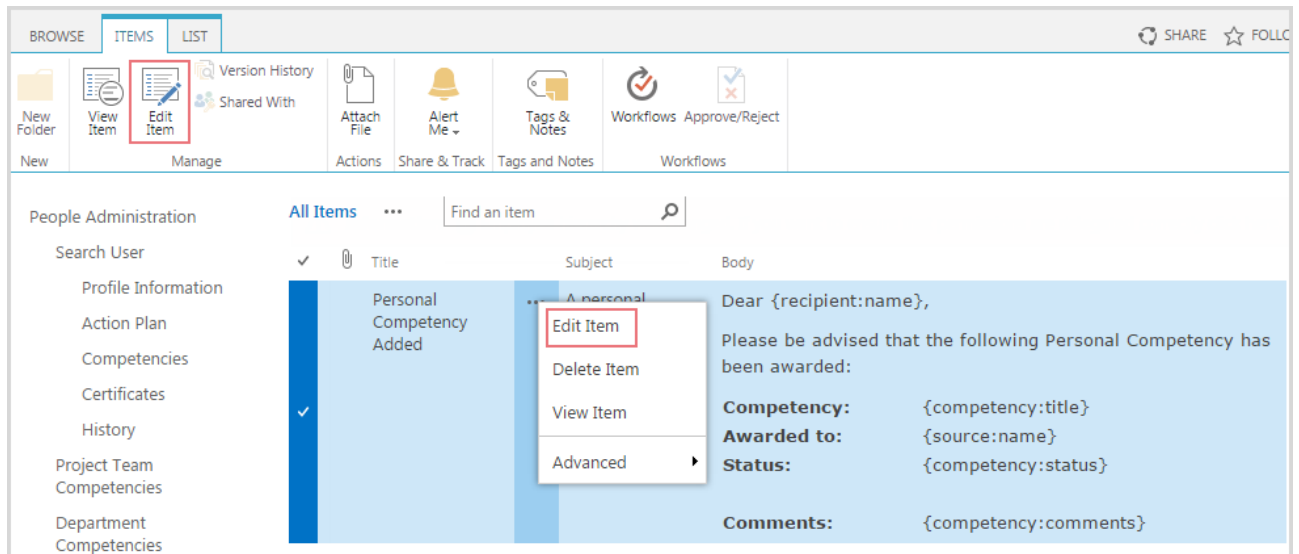
4) Click Close button to close the window and return to the Message Templates list.

Note that you can edit the Message Template from the View Form by clicking Edit Item on the ribbon menu (see Chapter 4.10.3 [Edit Message Template](#) for more information).

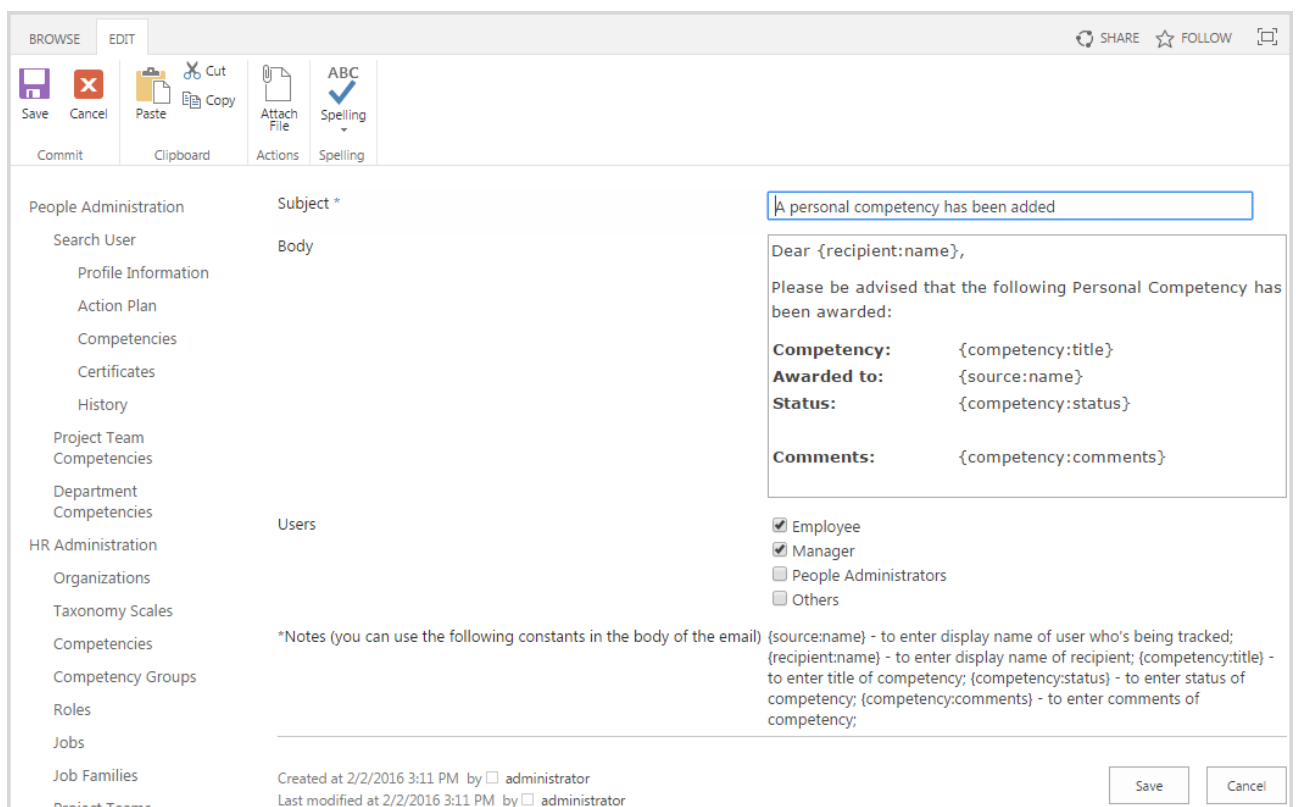
4.10.3 Edit Message Template

To change the Message Template, follow these steps:

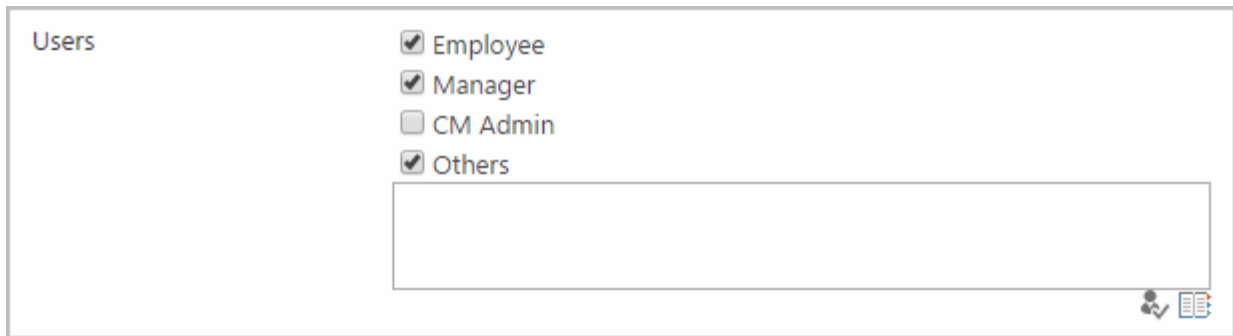
- 1) Select the Message Template in the Message Templates list;
- 2) From the ribbon menu Items or drop-down actions choose Edit Item:



- 3) Make the changes to the Message Template in the Edit form:



- Subject – type the subject (the field is required);
- Body – describe the subject;
- Users – select users who will receive email notification. If you check 'Others' option, a field with people picker will appear to add users:

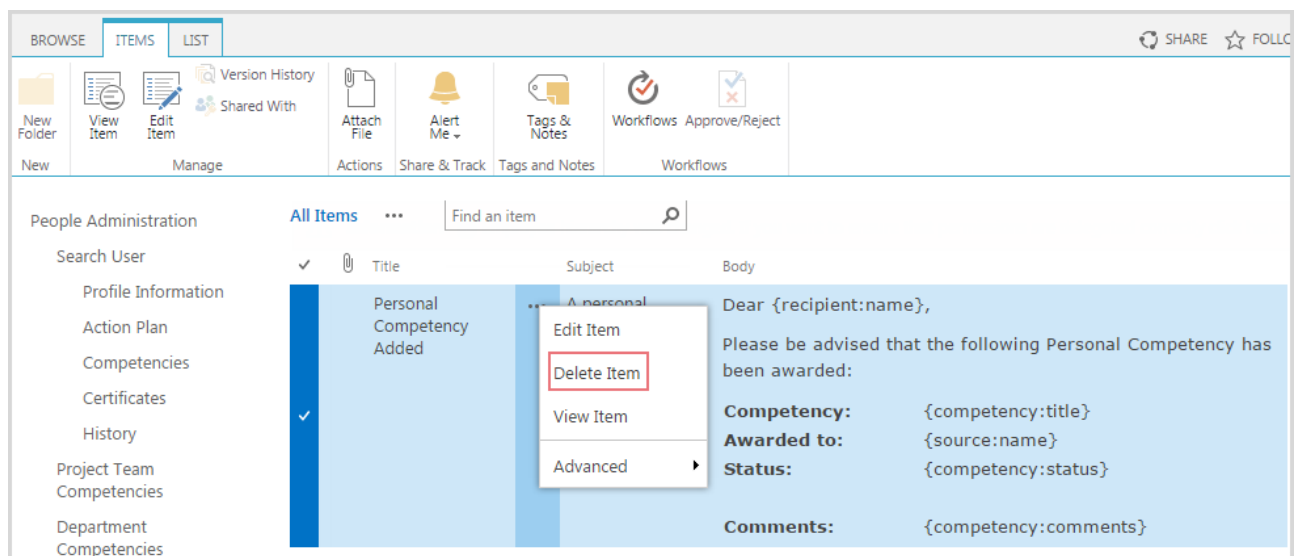


- 4) Click Save button to save the changes OR Cancel button to discard the changes. You will be redirected to the Message Templates list.

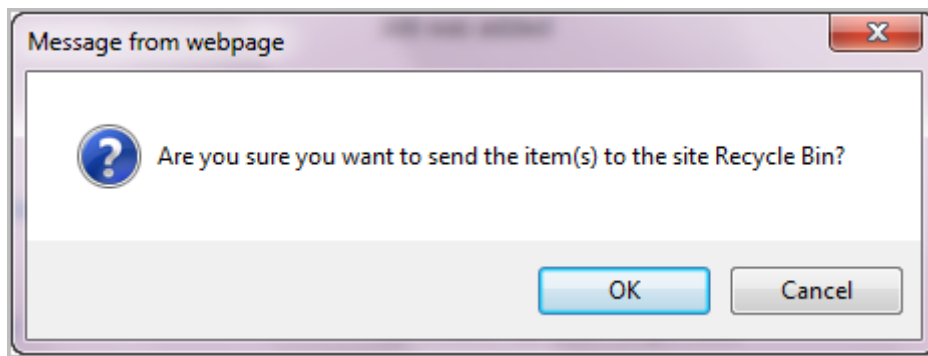
4.10.4 Delete Message Template

To remove the Message Template from the list, follow these steps:

- 1) Click the drop-down arrow against the Message Template name;
- 2) Choose Delete Item action from the action list:



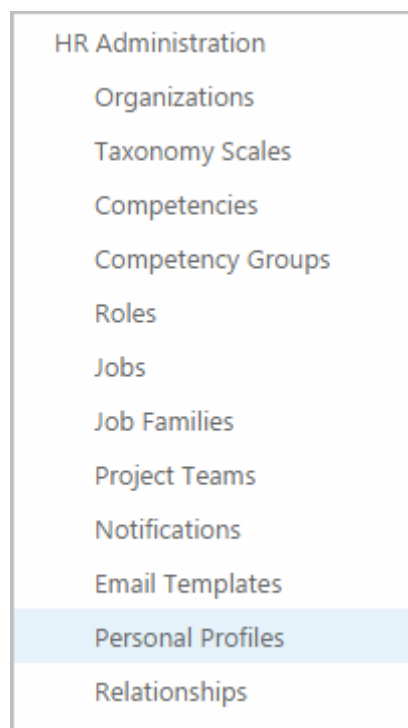
- 3) The system will ask you to confirm the decision to remove this Message Template:



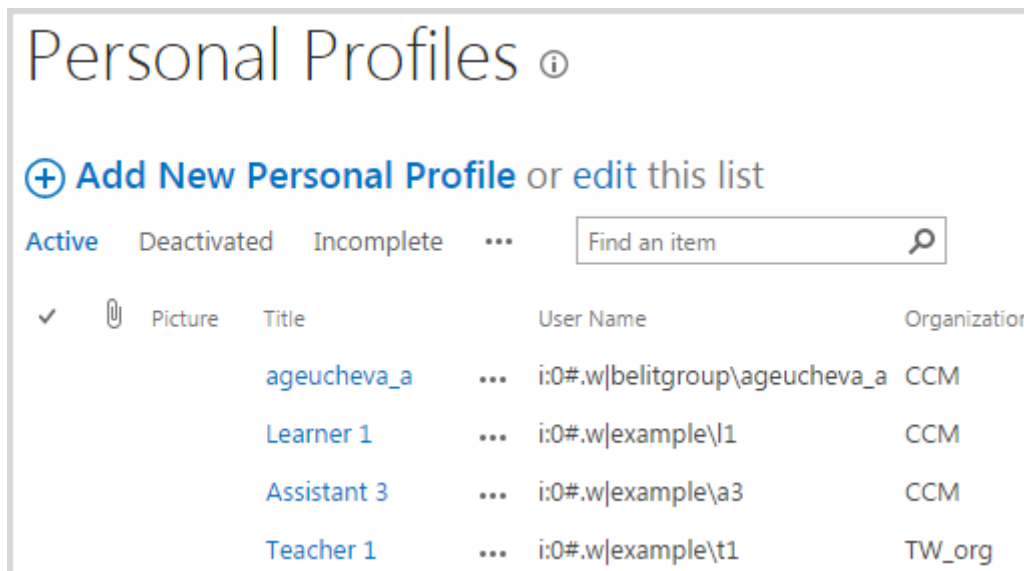
- 4) Click OK button to confirm the decision OR click Cancel button to discard the changes. You will be redirected to the Message Template list, where the removed Message Template will no longer be presented.

4.11 Personal Profiles

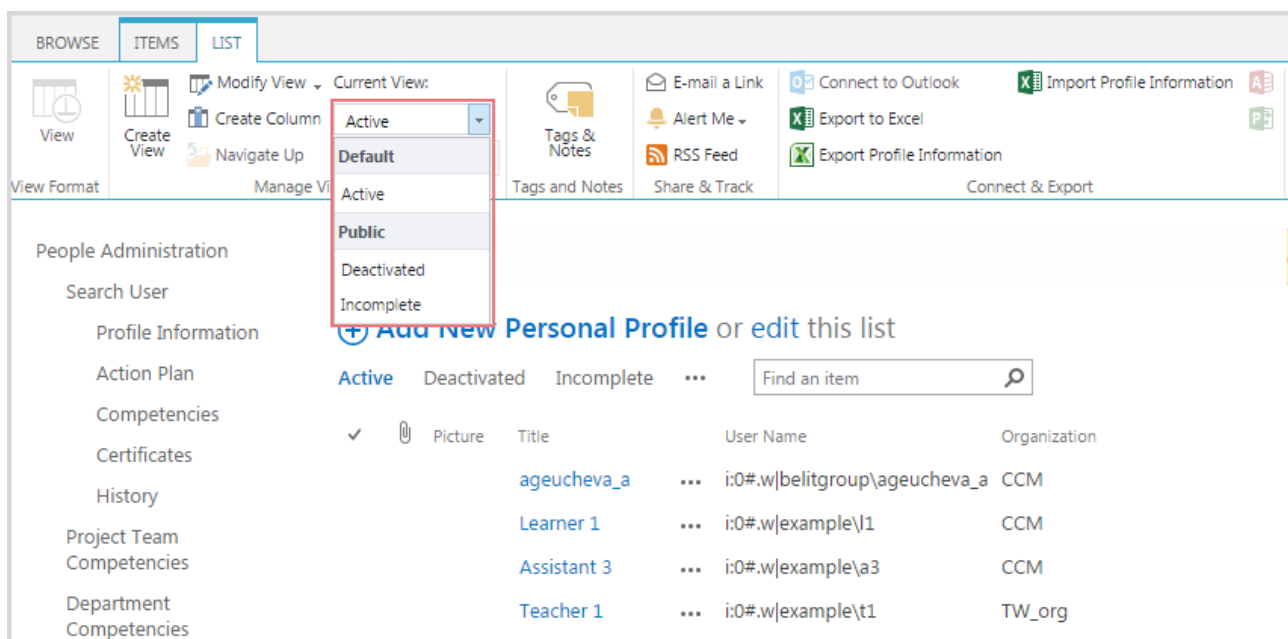
To access the Personal Profiles page, click the Personal Profiles link on the left side menu on the Home page:



The User is redirected to the Personal Profiles page where the Profiles of the employees are listed by employee's Title, User Name, and Organization:



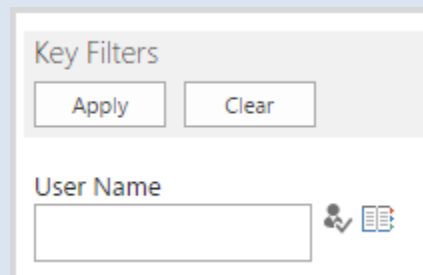
The following views are available for this list:



- Active – shows all profiles with “Active” status;
- Deactivated – shows all profiles with “Deactivated” status. These users are not shown anywhere except the Profile List page and can be searched and shown for administrator using Advanced Search;
- Incomplete – shows all profiles with “Incomplete” status. This status can be set manually by Administrator or automatically assigned after synchronizing profiles if some item (Job, Role, Competency) specified in the profile has several items with duplicating names.

NOTE: On newly created sites, Metadata Navigation and Filtering feature is activated by default, which allows adding a large number of users in Employees group and avoid threshold

limit excess error (when there are more users then set for List View Threshold) on Personal Profiles list after all Personal Profiles have been created. You can use User Key Filter on Personal Profiles list to filter necessary information:

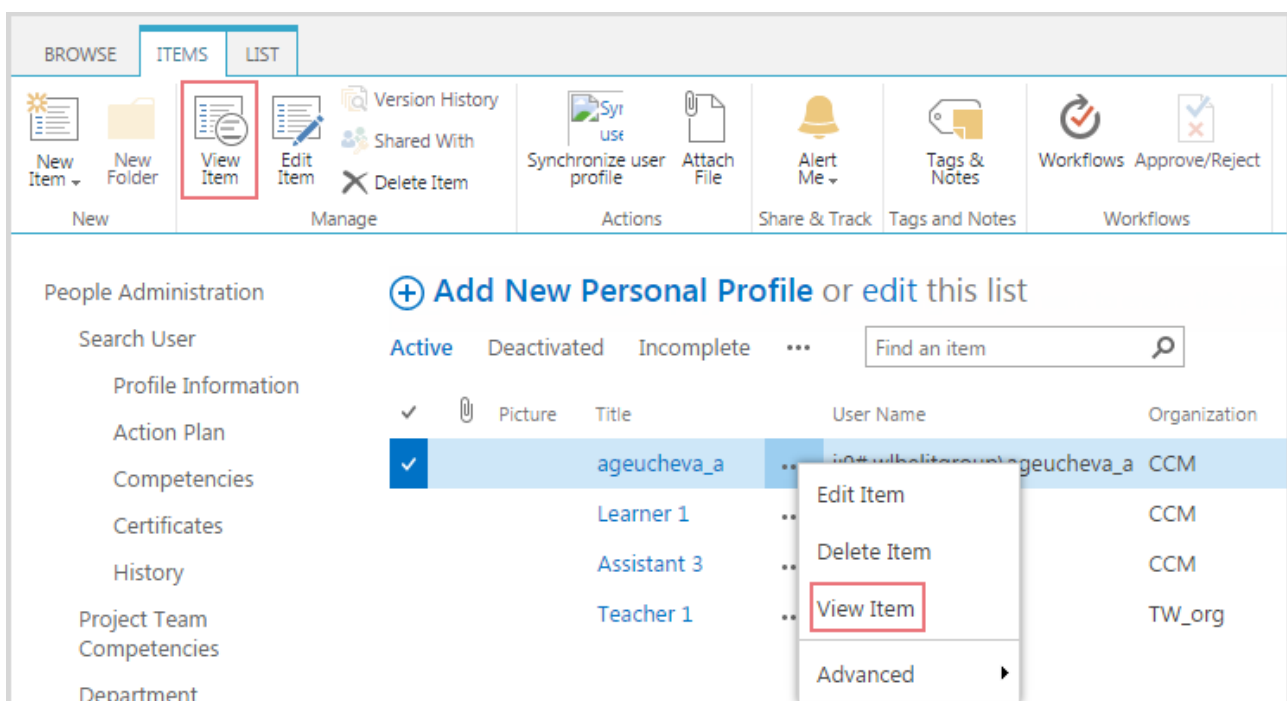


More filters can be added in the List Settings > Metadata navigation settings > Configure Key Filters. Do not forget to check whether new Key Filters have been added to the Indexed Columns. If not, you should index new Key Filters manually. To do this, go to List Settings > Indexed columns > Create a new index > select needed column and click Create button.

4.11.1 View Employee's Profile

To see the employee's Profile details, the User follows the steps below:

- 1) Select the employee's Profile from the Personal Profiles list;
- 2) From the ribbon menu Items or drop-down actions choose View Item:



The screenshot shows the LMS365 interface. At the top, there are tabs for 'BROWSE', 'ITEMS', and 'LIST'. The 'ITEMS' tab is active, and the 'View Item' button is highlighted with a red box. Below the ribbon, there is a section for 'People Administration' with a search bar and a list of items. The list has columns for 'Picture', 'Title', 'User Name', and 'Organization'. One item is selected, and a context menu is open over it, with the 'View Item' option highlighted by a red box.

Picture	Title	User Name	Organization
<input checked="" type="checkbox"/>	ageucheva_a	ageucheva_a	CCM
<input type="checkbox"/>	Learner 1		CCM
<input type="checkbox"/>	Assistant 3		CCM
<input type="checkbox"/>	Teacher 1		TW_org

3) The View form will open with the employee Personal Profile details:

User Name	i:0#.w belitgroup\ageucheva_a
Title	ageucheva_a
First Name	Anna
Middle Name	
Last Name	Ageucheva
Organization	CCM
Department	Sales
Picture	
Suffix	
Status	
Gender	Female
Jobs	Starcups IT Support Manager
Manager	
HR Responsible	
Employment Start Date	1/12/2016
Employment Type	Full time
Terminated On	
Birth Date	
Work Phone	
Home Phone	
Fax	
E-mail	
Address	
City	
State/Province	
ZIP/Postal code	
Profile Status	Active

Created at 3/9/2016 6:35 PM by System Account
 Last modified at 3/10/2016 3:06 PM by ageucheva_a

4) Click Close button to return to the Personal Profiles page.

4.11.2 View Employee's Profile from User Search page

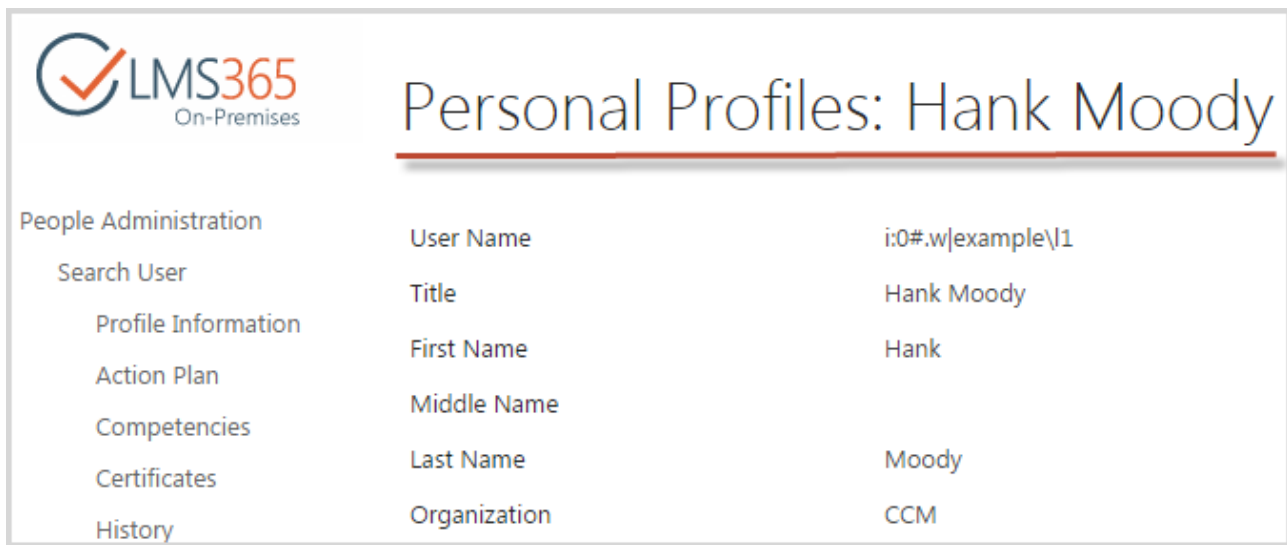
You can also view the employee Personal Profile details from the User Search page. To do it, follow these steps:

- 1) Open the User Search page (see Chapter 7.1 [Search User](#) for guidance);
- 2) Select the employee from the search results list (see Chapter 6.1.1 [Selected User's details](#) for guidance);
- 3) Click on the Name in the search results list;

OR

- 4) Select the Name in the Search result to place it in the selected user box. Under the People Administration section choose Profile Information menu;

You will be redirected to the selected employee's Personal Profile page:



People Administration	
Search User	User Name: i:0#.w example\l1
Profile Information	Title: Hank Moody
Action Plan	First Name: Hank
Competencies	Middle Name:
Certificates	Last Name: Moody
History	Organization: CCM

- 5) Click Close button to return to the Search User page.

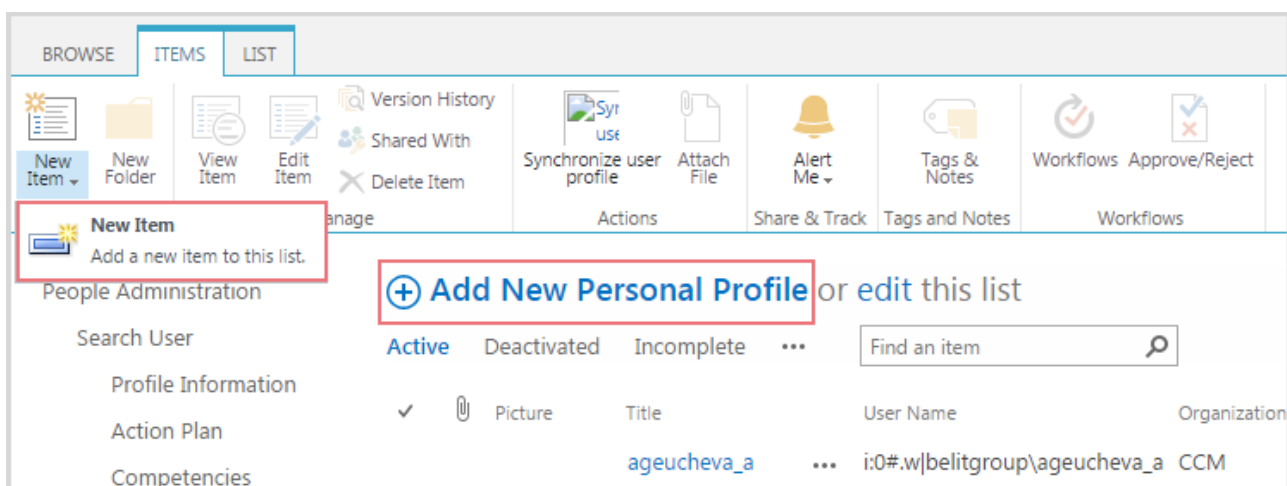
4.11.3 Create Employee's Profile

To create the personal Profile for the employee, the User follows the steps below:

- 1) Click Add New Personal Profile button  ;

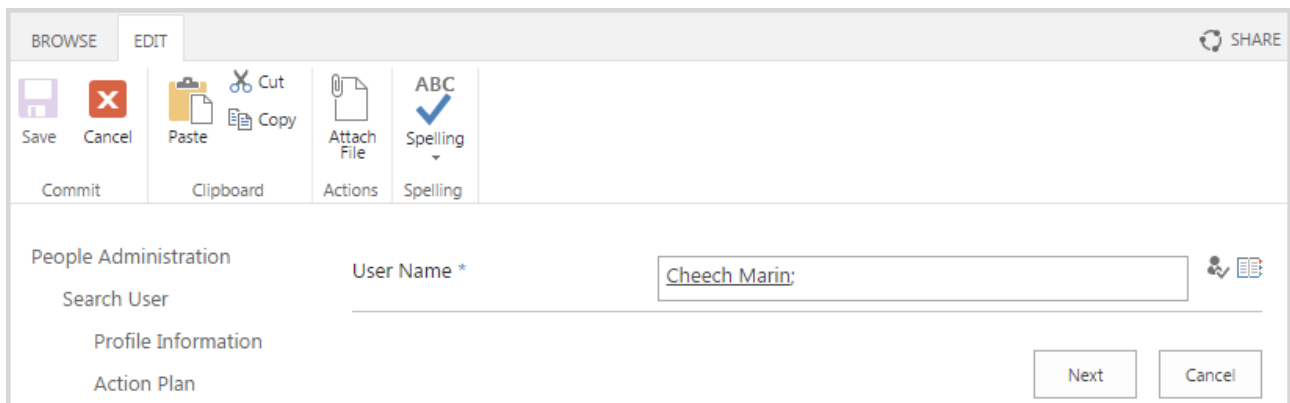
OR

- 2) On the ribbon go to Items > New Item and choose New Item from the drop-down:




The screenshot shows the 'ITEMS' tab on the ribbon. The 'New Item' dropdown menu is open, and the 'Add New Personal Profile' option is highlighted with a red box. Below the ribbon, the 'People Administration' section is visible, showing a search bar and a list of users. The user 'ageucheva_a' is highlighted in the list.






The Personal Profiles – New Item form opens that prompts the User to select the User Name of an employee for whom the Personal Profile is being created:



The screenshot shows a software interface with a ribbon at the top. The ribbon has two tabs: 'BROWSE' and 'EDIT'. Under the 'EDIT' tab, there are several groups of icons: 'Save' (floppy disk), 'Cancel' (red X), 'Paste' (clipboard), 'Cut' (scissors), 'Copy' (document with plus), 'Attach File' (paperclip), and 'Spelling' (ABC with checkmark). Below the ribbon, there is a 'People Administration' section. It includes a 'Search User' field with a magnifying glass icon, a 'Profile Information' section, and an 'Action Plan' section. The 'User Name *' field is highlighted and contains the text 'Cheech Marin:'. To the right of this field is a 'Browse' icon (three people) and a 'List' icon (document with lines). At the bottom right of the form, there are two buttons: 'Next' and 'Cancel'.

- 3) Enter the user name of an employee or pick the user name from the list of employees with the help of user picker by clicking on the Browse icon ;
- 4) Click Next button to go to the rest of the New Item form or click Cancel button to discard the process;
- 5) Fill in the opened form:

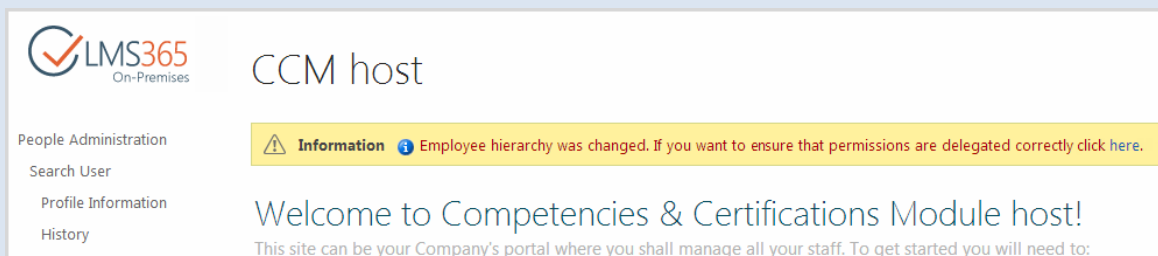
i This field is related to SharePoint profile property. Go to [sharepoint user profile](#) to edit it.

User Name *	i:0#.w example\learner 1	
Title	i John Smith	
First Name *	<input type="text" value="John"/>	
Middle Name	<input type="text"/>	
Last Name *	<input type="text" value="Smith"/>	
Organization *	CCM ▼	
Department	Sales ▼	
Picture	i	
Prefix	Mr. ▼	
Status	Single ▼	
Gender	Male ▼	
Jobs *	<input type="text" value="Starcups IT Support Manager"/>	
Manager	<input type="text" value="ageucheva a:"/>	
HR Responsible	<input type="text"/>	
	Enter users separated with semicolons.	
Employment Start Date	<input type="text" value="3/10/2016"/>	
Employment Type	Full time ▼	
Terminated On	<input type="text"/>	
Birth Date	<input type="text"/>	
Work Phone	<input type="text"/>	
Home Phone	<input type="text"/>	
Fax	<input type="text"/>	
E-mail	i a@a.com	
Address	<input type="text"/>	
City	<input type="text"/>	
State/Province	<input type="text"/>	
ZIP/Postal code	<input type="text"/>	
Profile Status *	Active ▼	

- Title field is filled in based on the employee's name entered in the previous step;
- User Name is filled in automatically by the system as SharePoint Profile property. It is NOT editable.

5) Click Save button to create a Profile for the employee or click Cancel button to discard the process.


NOTE: After you create a new User Profile, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:



Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.11.4 Create Employee's Profile from User Search page

The User can also create a new Profile for an employee from the User Search page.

- 1) Open the User Search page (see Chapter 6.1 [Search User](#) for guidance);
- 2) Click on the  to the left of the user Name to open the Personal Profiles – New Item form.

4.11.5 Export Profile Information

Global Administrator and People Administrator can export profile information to .csv file.

To export profile information, perform the following actions:

1. Go to Settings > Profiles;
2. Go to List in the ribbon menu and click Export Profile Information:

BROWSE ITEMS LIST

View Create View Modify View Current View: Active Tags & Notes E-mail a Link Alert Me RSS Feed Connect to Outlook Export to Excel **Export Profile Information** Import Profile Information

View Format Manage Views Tags and Notes Share & Track Connect & Export

People Administration **+ Add New Personal Profile** or edit this list

Search User Active Deactivated Incomplete Find an item

Profile Information

Action Plan ✓ Picture Title User Name Organization

Competencies aqeucheva_a ... i:0#w\belitgroup\aqeucheva_a CCM

3. Select options for the exported file:

People Administration Separator

Search User

Profile Information Properties

Action Plan

Competencies

Certificates

History

Project Team

Competencies

Department

Competencies

HR Administration

Organizations

Taxonomy Scales

Competencies

Competency Groups

Roles

Jobs

Job Families

Project Teams

Notifications

Email Templates

Personal Profiles

Relationships

Announcements

Surveys

Select or deselect all items

First Name

Middle Name

Last Name

Organization

Department

Picture

Prefix

Status

Profile Status

Gender

Jobs

Manager

HR Responsible

Employment Start Date

Employment Type

Terminated On

Birth Date

Work Phone

Home Phone

Fax

E-mail

Address

City

State/Province

ZIP/Postal code

OK Cancel

- Separator – select from the drop-down which character will be used as separator;
- Properties – select fields to be exported.

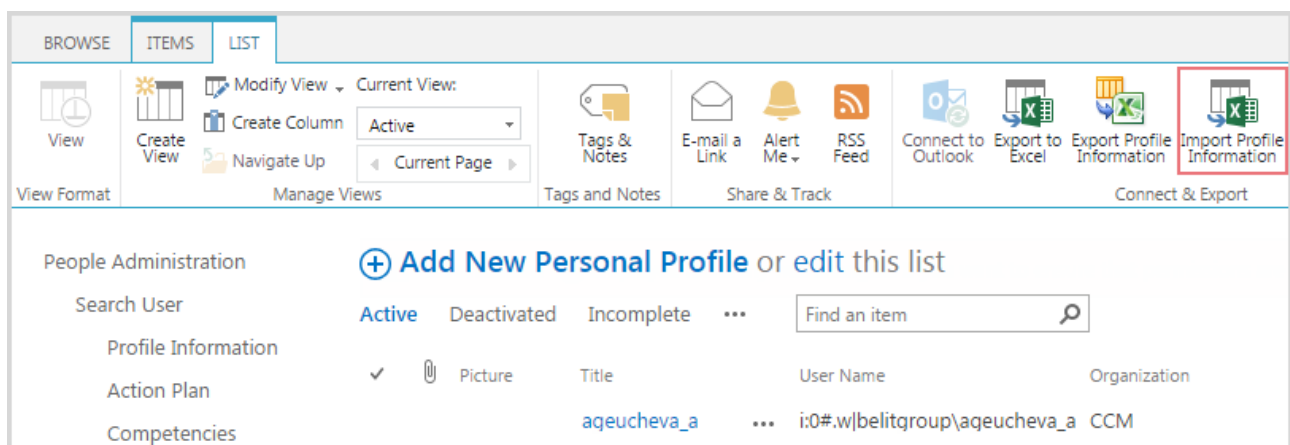
Click OK to save the file on your local computer. Information from all User Profiles will be exported to .csv file.

4.11.6 Import Data from .csv file

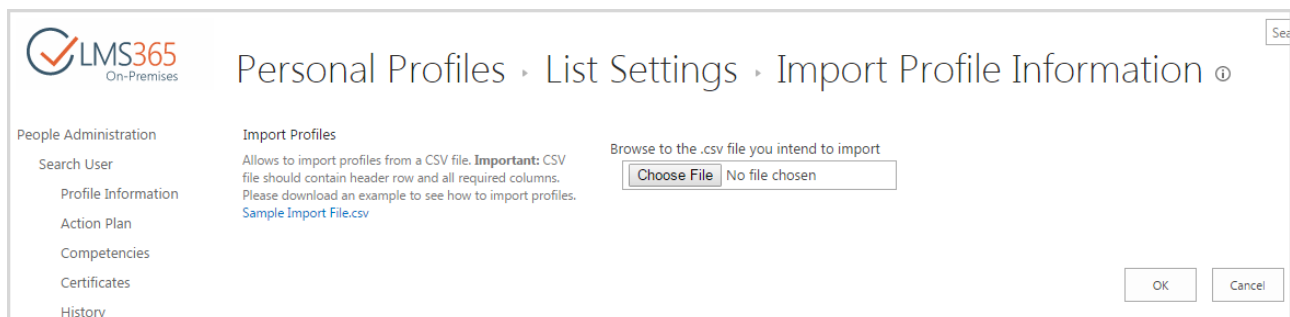
It is possible to import data from .csv file for the following Lists: Profiles, Roles, Taxonomy Scale, Behavioral Indicator, Competency, Competency Group. The process of importing Profile Information is described below.

Import Profile Information is designed for filling user profile information and can be used for bulk import of profiles. To import profile information, do the following actions:

- 1) Enter the necessary list and click the Import Profile Information button in the List in the ribbon menu:



- 2) Select a .csv file from your computer for upload:



NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

Required columns can be set in Profiles List > List Settings:

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
First Name	Single line of text	✓
Middle Name	Single line of text	
Last Name	Single line of text	✓
	Organization	✓
Organization	Organization	✓
Department	Choice	
Prefix	Choice	
Status	Choice	
Profile Status	Choice	✓
Gender	Choice	
Jobs	Job	✓
Manager	Employee	
HR Responsible	Employees	
Employment Start Date	Date and Time	

All required columns are marked in the 'Required' column. To set a column as required/not required, click on the name of the needed column and select the needed option in the Additional Column Settings section:

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

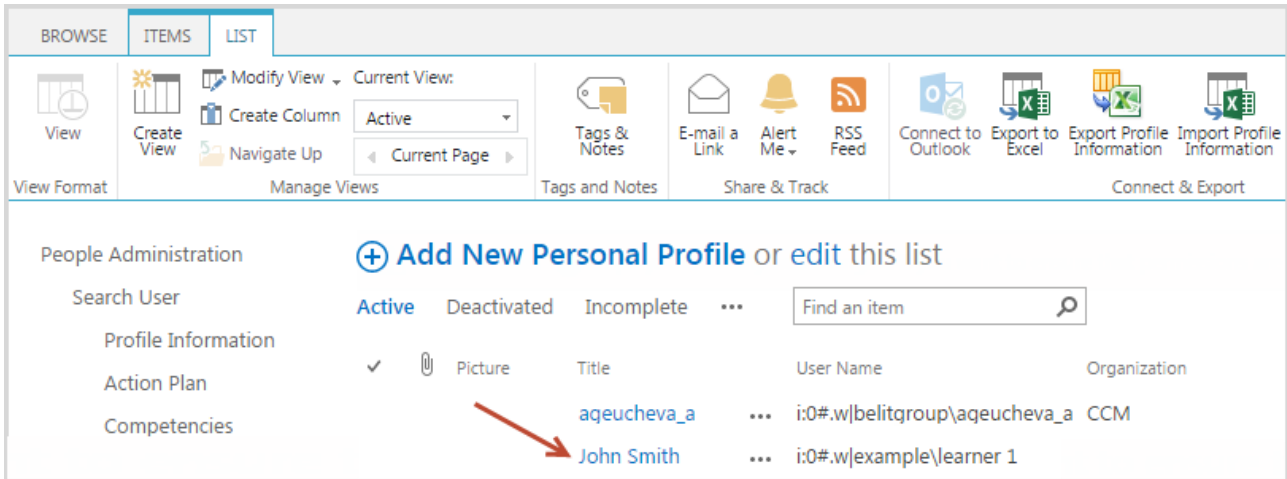
Enforce unique values:
 Yes No

Maximum number of characters:

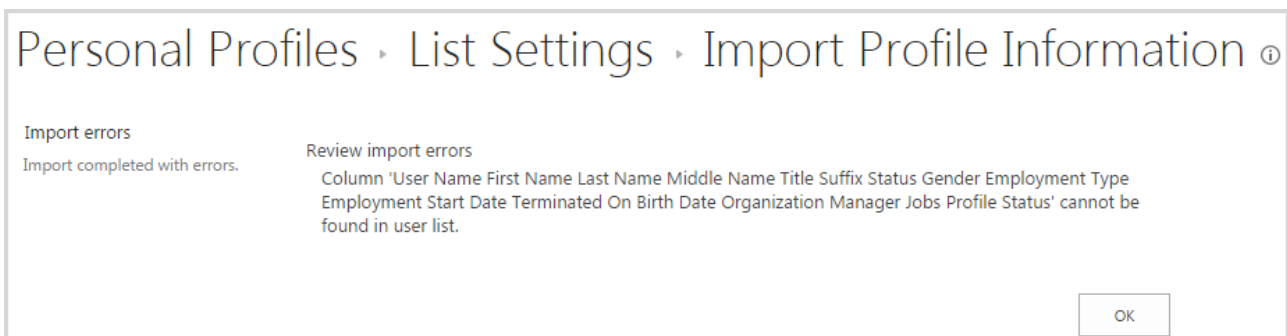
Default value:
 Text Calculated Value

NOTE: Make sure that user you want to upload is added to Employees or Managers group in CCM.

3) Click OK to confirm import. The imported profiles will be added to the Profiles list:



If SharePoint User profile service is activated on a certain web application then fields Title, Email and Pictures are marked as related to the SharePoint profile entry. It means values for these fields will be taken from the SharePoint User Profile. If your import file contains values for these fields, the profile will be uploaded but values for these fields will be taken from SharePoint User Profile and you will receive a warning message:



If SharePoint User profile service is not activated then fields Title, Email and Pictures will be uploaded from the import file.

NOTE: If import file contains data for several profiles and there is some incorrect value in a certain profile, then correct profiles will be uploaded. Profile with incorrect data will be not uploaded and error will be displayed at the end of action.

4.11.7 Security Settings

Permissions to view and edit profile fields are set in the Security column settings section.

To change these permissions, go to Profiles List > List Settings > Column security settings:



Personal Profiles > List Settings > Security column settings

Column Settings

"Self-managed" specifies whether users can change the values for this field in their user profile. Administrator can edit any field value for any user within organization.

"Show in profile for" specifies the privacy policy you want applied to this field.

Field	Project Team Leader	Manager	Owner	Everyone	Allow edit
Select or deselect all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Picture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prefix	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profile Status	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HR Responsible	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment Start Date	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment Type	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Terminated On	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Birth Date	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State/Province	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZIP/Postal code	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

- Zone 1 allows setting permission to view profile field by role;
- Zone 2 allows setting permission to edit profile field. If field edit is allowed and user's role has permission to view this field - user can edit the field.

Change the settings as needed and click OK to save changes or Cancel to discard changes.

4.11.8 Edit Employee's Profile

To modify the information in the employee's Personal Profile, following these steps:

- 1) Select the employee's Profile from the Personal Profiles list;
- 2) Click Edit Item from the Items on the ribbon;

OR

- 3) Click on the actions drop-down arrow next to the employee's Title;
- 4) Choose View Item from the actions list:

The screenshot shows the LMS365 interface with the 'ITEMS' tab selected. The ribbon includes 'New', 'Manage', 'Actions', 'Share & Track', 'Tags and Notes', and 'Workflows'. The 'Edit Item' button in the 'Manage' group is highlighted with a red box. Below the ribbon, the 'People Administration' section is visible, showing a list of personal profiles. The 'Add New Personal Profile' button is also highlighted. A search bar and filter tabs ('Active', 'Deactivated', 'Incomplete') are present. The table below shows a list of profiles with columns for 'Picture', 'Title', 'User Name', and 'Organization'. The first row is highlighted, and a context menu is open over it, with 'Edit Item' highlighted by a red box.

Picture	Title	User Name	Organization
	agecheva_a	i:0#.w belitgroup\agecheva_a	CCM
	Learner 1		CCM
	Learner 2		CCM
	Learner 3		CCM

The Personal Profile – Edit form opens:

i This field is related to SharePoint profile property. Go to [sharepoint user profile](#) to edit it.

User Name *

Title **i**

First Name *

Middle Name

Last Name *

Organization *

Department

Picture **i**

Prefix

Status

Gender

Jobs *

Manager

HR Responsible


Enter users separated with semicolons.

Employment Start Date

Employment Type

- 5) Make the changes to the personal data of the employee in the Edit form;
- 6) Click Save button to save the changes or click Cancel button to discard the process.

NOTE: After you edit a User Profile, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:



People Administration
Search User
Profile Information
History

CCM host

Information **i** Employee hierarchy was changed. If you want to ensure that permissions are delegated correctly click [here](#).

Welcome to Competencies & Certifications Module host!

This site can be your Company's portal where you shall manage all your staff. To get started you will need to:

Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

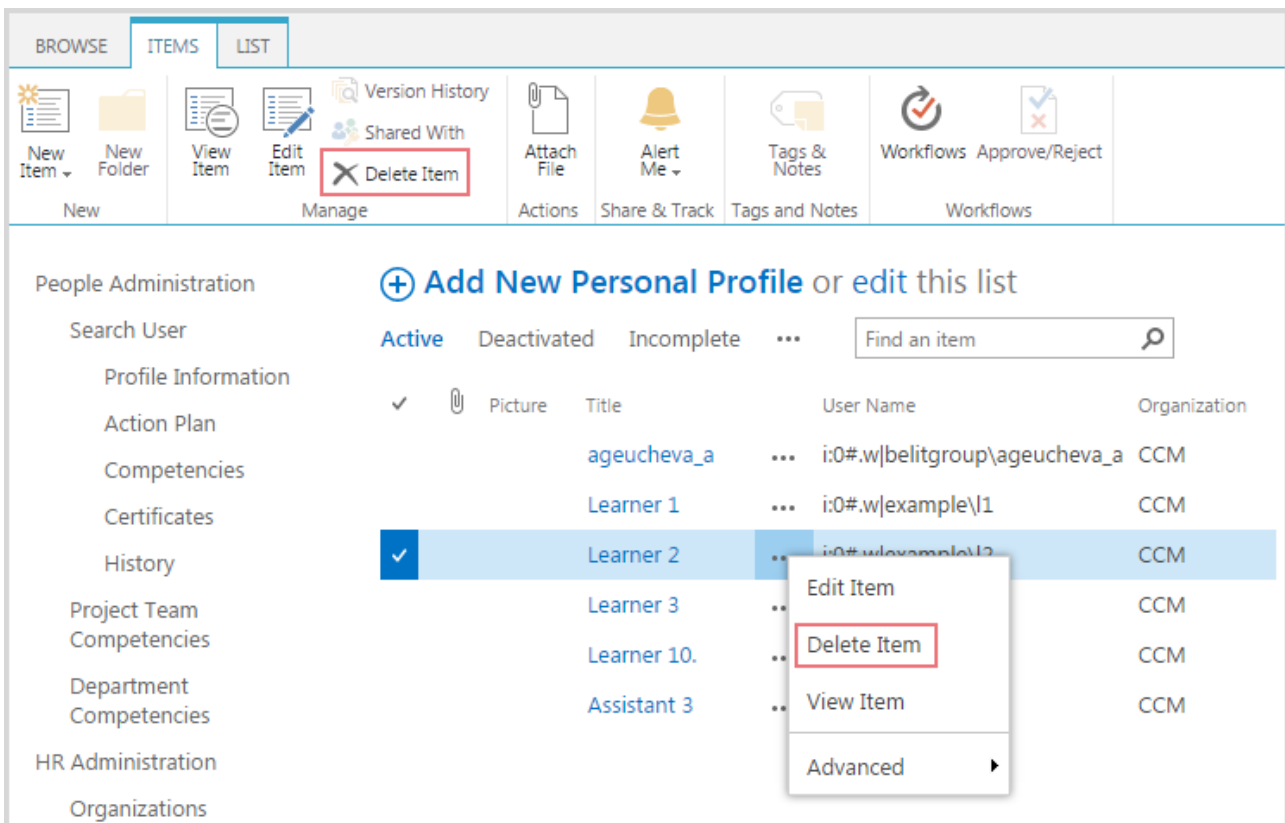
4.11.9 Delete Employee's Profile

To delete the employee's Personal Profile, the User goes through the following steps:

- 1) Select the employee's Profile from the Personal Profiles list;
- 2) Click Delete Item from the Items on the ribbon;

OR

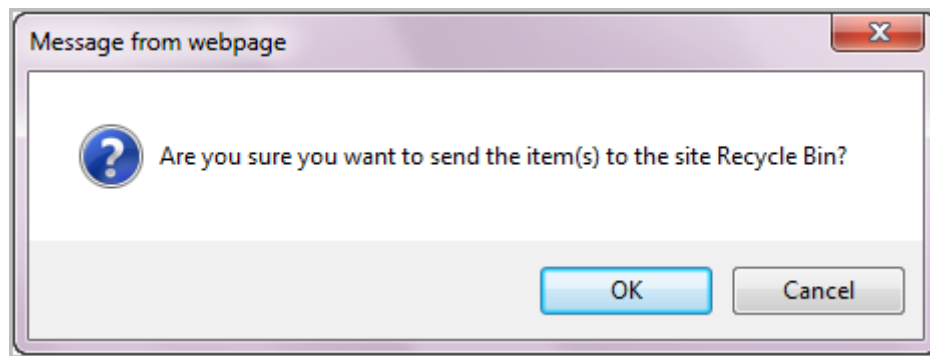
- 3) Click on the callout menu next to the employee's name;
- 4) Choose Delete Item from the actions list:



The screenshot shows the LMS365 interface with the 'ITEMS' tab selected. The ribbon includes 'Delete Item' (highlighted with a red box) under the 'Manage' group. Below the ribbon, the 'People Administration' section is visible, showing a list of profiles. The 'Learner 2' profile is selected, and a callout menu is open over it, with 'Delete Item' (highlighted with a red box) as one of the options.

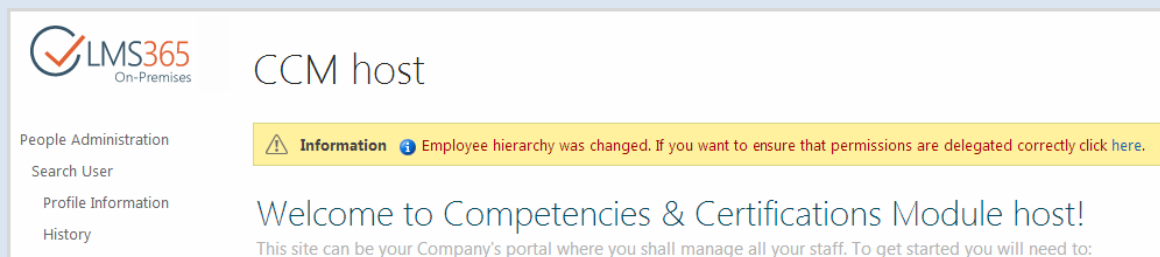
Profile Information	Picture	Title	User Name	Organization
ageucheveva_a			i:0#.w belitgroup\ageucheveva_a	CCM
Learner 1			i:0#.w example\1	CCM
Learner 2			i:0#.w example\12	CCM
Learner 3				CCM
Learner 10.				CCM
Assistant 3				CCM

The system displays the message asking to confirm the decision to remove the Profile:



- 5) Confirm the decision to delete the Personal Profile of an employee by clicking OK button or discard the process by clicking Cancel button.

NOTE: After you delete a User Profile, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:

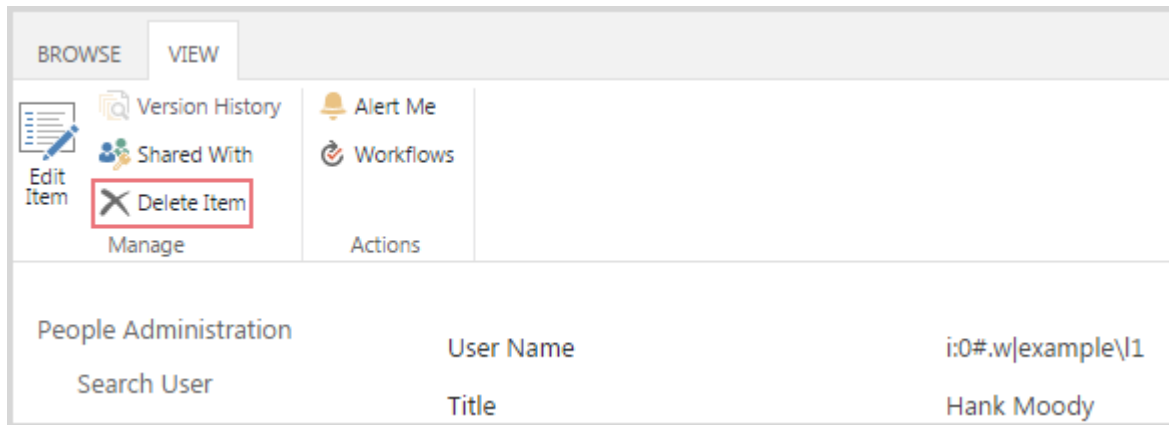


Permissions are updated by the EARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.11.9.1 Delete Employee's Profile from User Search page

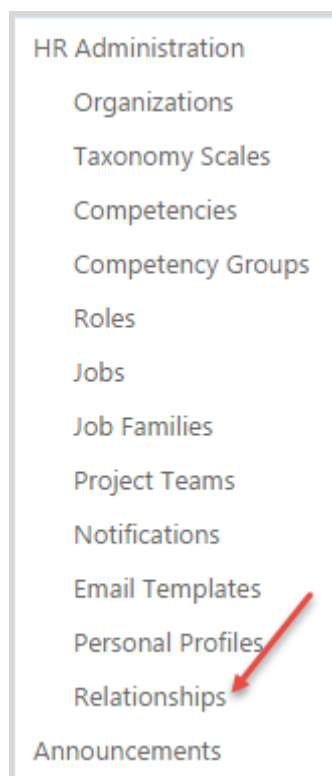
To remove the Personal Profile of the employee, follow these steps:

- 1) Open the employee's Personal Profile page (refer to the [View Employee's Profile](#) section for guidance);
- 2) From the ribbon menu View choose Delete Item:

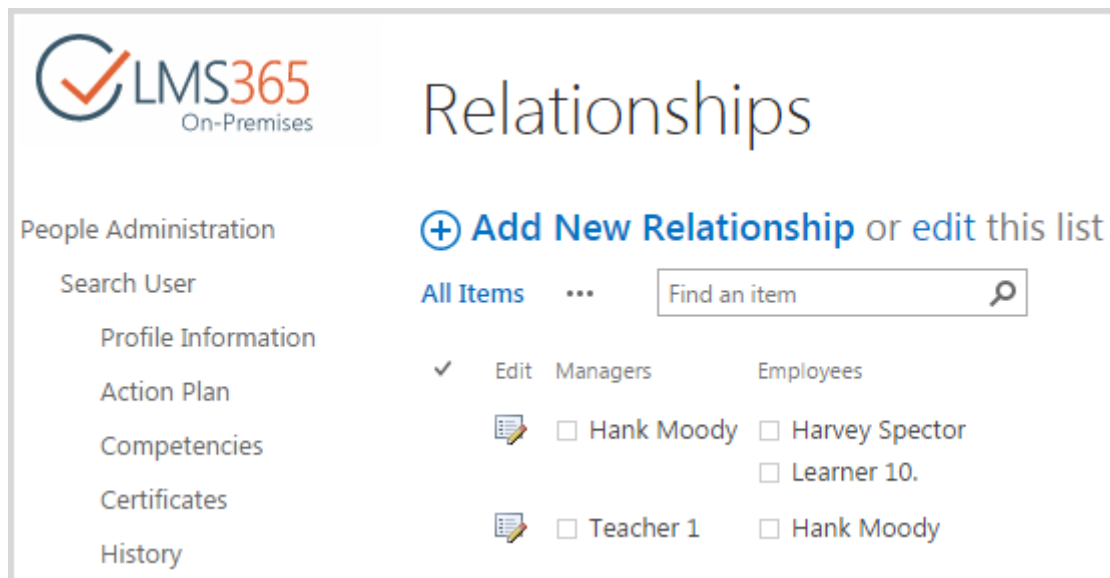


4.12 Relationships

This section allows setting relationships between users. To access the Relationships page, click the Personal Relationships link on the left side menu on the Home page:

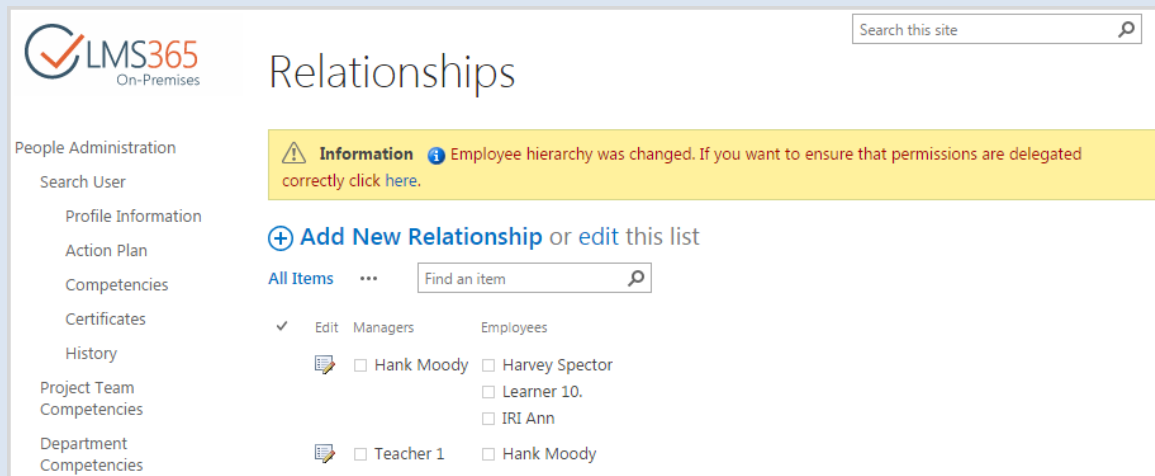


The User is redirected to the Relationships page where the list of Relationships is displayed:



Managers in this list are Additional Line Managers who have the same permissions as managers set in user's personal profile but are not displayed in Organization Hierarchy web-part. Information about Relationships is used in Dashboard solution as well.

NOTE: After changes to Relationships items a warning message is displayed about changes in the employee hierarchy:

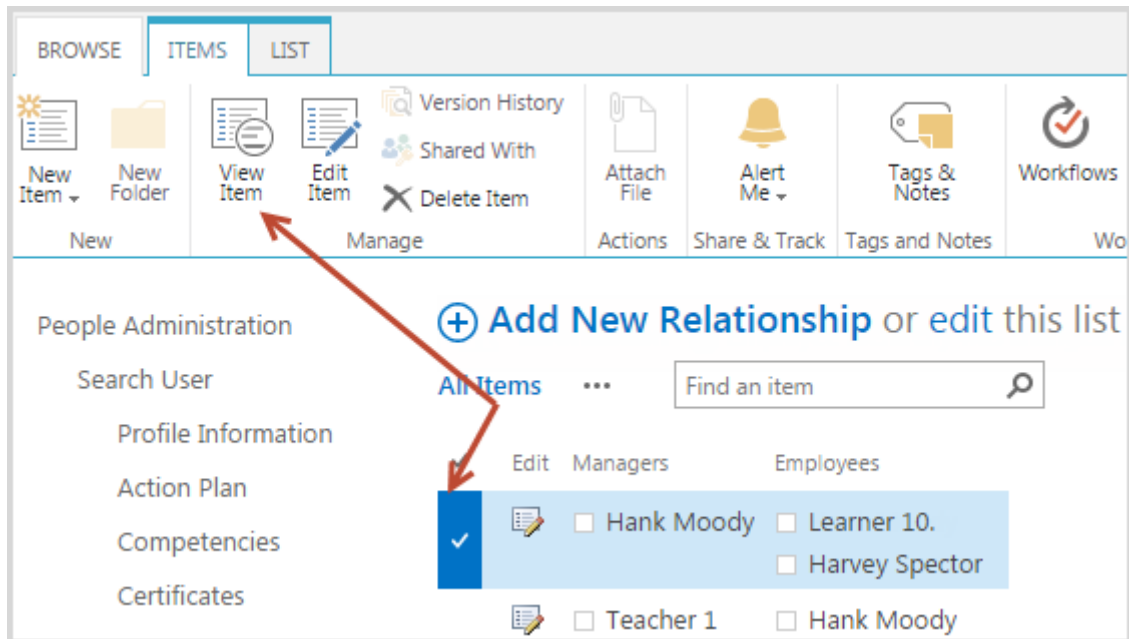


Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.12.1 Viewing Relationships


To view a relationship, do the following:

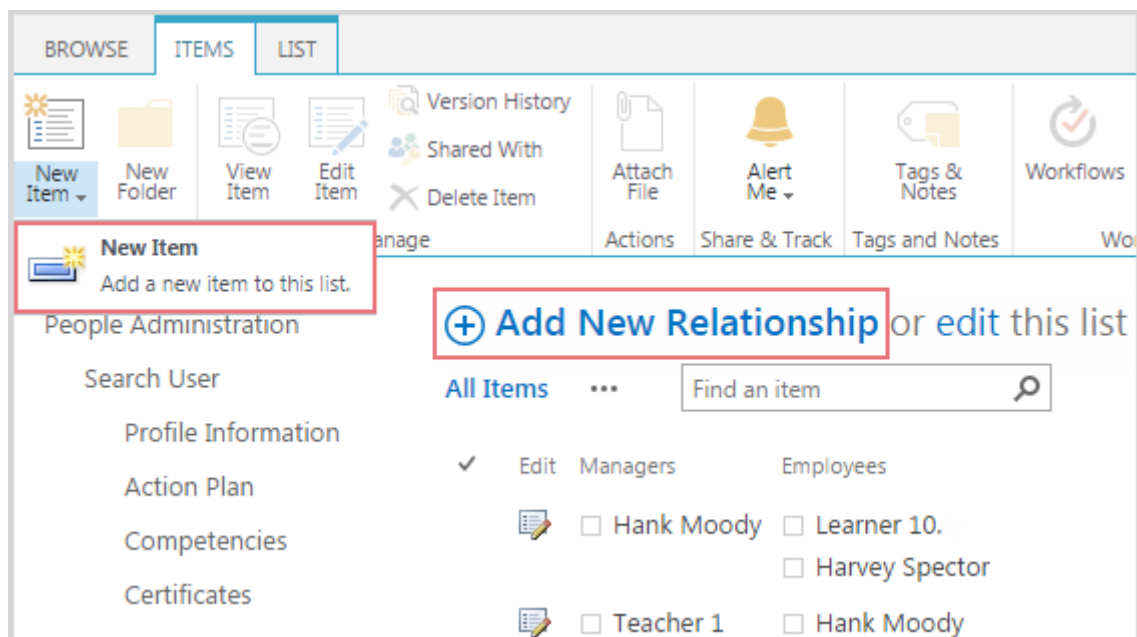
1. Select the check box next to the relation you want to view;
2. Click the View Item icon in the Items tab:



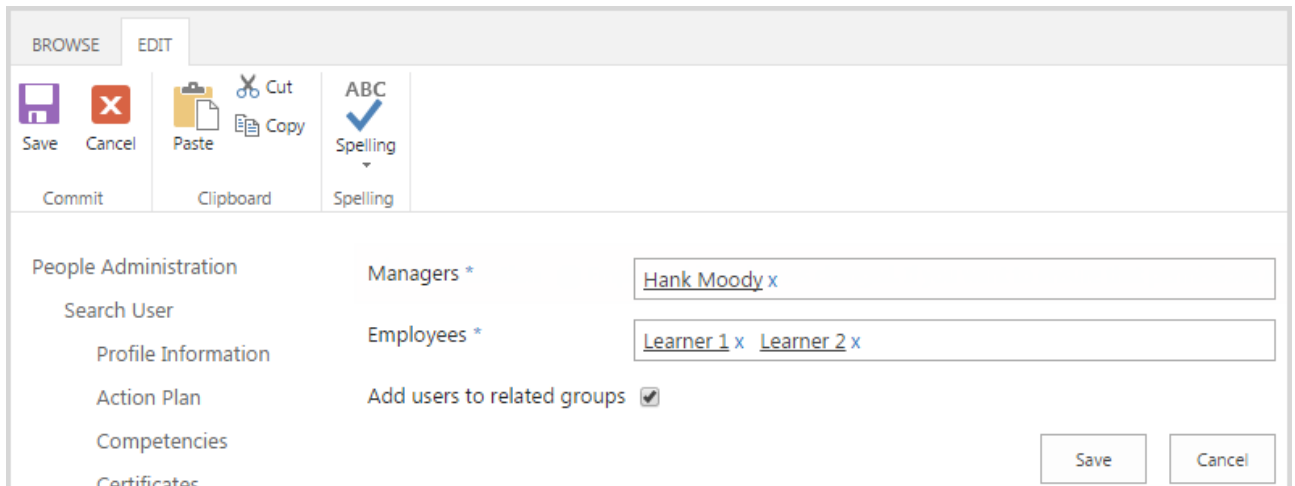
4.12.2 Creating Relationships

To create a new Relationship, do the following:

1. Click the New item button on the Items tab or click Add New Relationship button  above the list of existing relationships:




2. Fill in the opened form as described below:

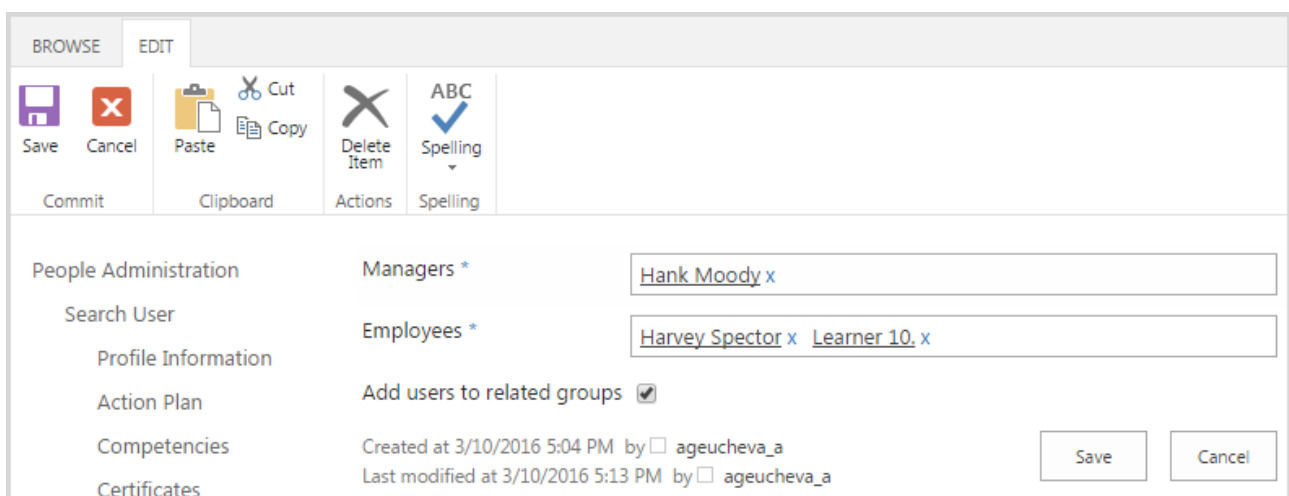


- *Managers* – specify managers for the relationship. Users will become Additional Line Managers for selected employees and will be granted corresponding permissions described in [Permissions](#) section.
- *Employees* – specify employees for the relationship.
- *Add users to related groups* – enable option to add selected users to Employees group automatically.

3. Click Save to create a relationship. Click Cancel to discard the changes.

4.12.3 Editing Relationships

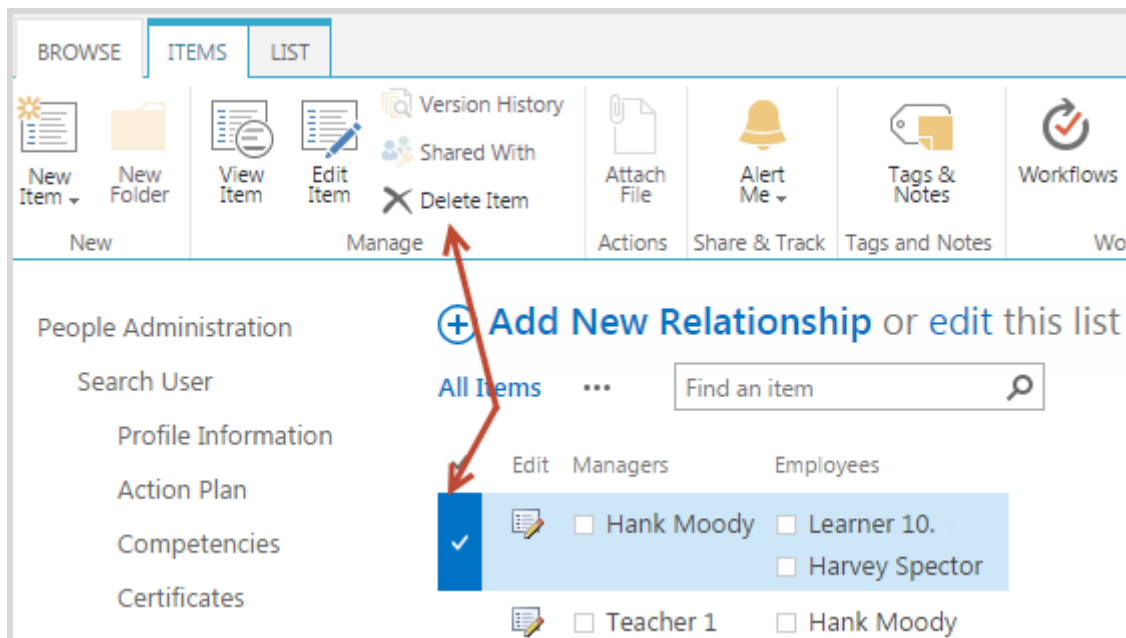
To edit a Relationship click Edit item () icon against the Relationship you want to edit, or select the check box next to the relation you want to edit and click the View Item icon in the Items tab. Modify the Relation in the open form:



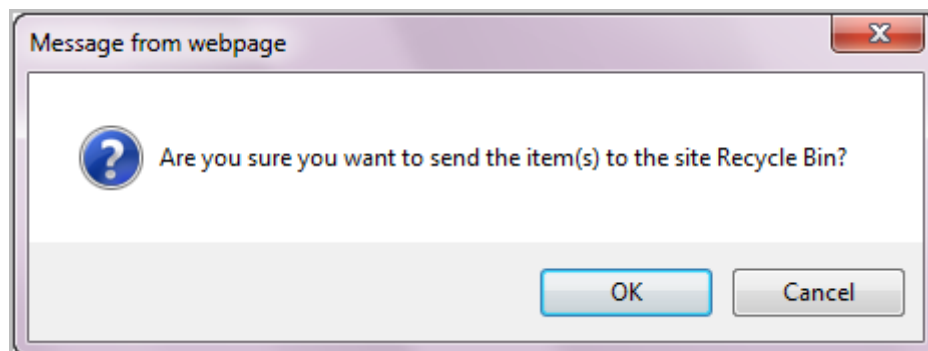
Click Save to save changes. Click Cancel to discard the changes.

4.12.4 Deleting Relationships

To delete an item select the check box next to the relation you want to edit and click the Delete Item icon in the Items tab:



The system will ask you to confirm the decision to delete the selected Relationship:



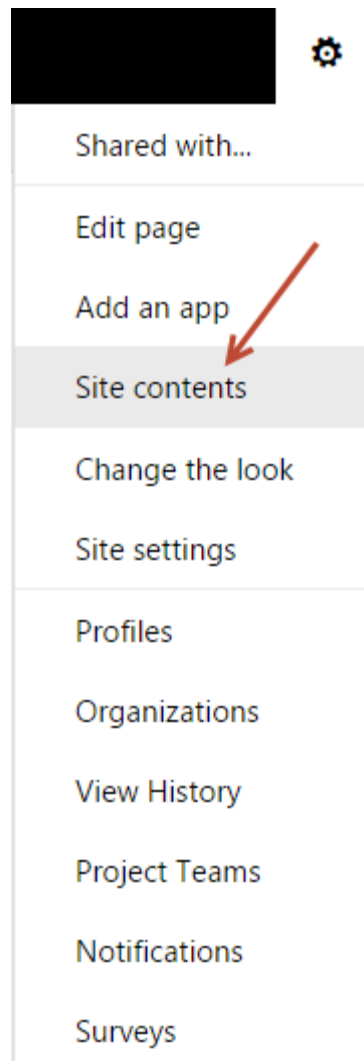
Click OK button to confirm the decision OR click Cancel button to discard the changes. You will be redirected to the Relationships list, where the removed item will no longer be presented.

5 SHAREPOINT CCM ATTACHMENTS MANAGEMENT

The Attachments are stored and managed in the standard SharePoint Document Libraries. The files in the SharePoint CCM are handled in the Attachment lists. Global Administrator has the full administrative control to create, modify and delete Attachments from Attachments list on the enterprise level (for instance, Attachments within Competency Framework). Attachments within each Organization and Project Team will be handled by People Administrator and Project Team Leader respectively based on their security permissions.

The user can follow either one of the options described below:

- 1) To access the Document Library from the Settings click Site Contents to view the full list of Document Libraries:




- a. Click on the name of the Document Library you want to open:


Site Contents

Lists, Libraries, and other Apps


SITE WORKFLOWS SETTINGS




add an app




Action Plan
12 items
Modified 3 days ago




Announcements
0 items
Modified 4 months ago




Certificate Templates
2 items
Modified 4 months ago




Certificates
4 items
Modified 3 days ago




Competencies
60 items
Modified 3 days ago



Competency Groups
3 items
Modified 3 months ago








Document Library
2 items
Modified 4 months ago







Email Templates
12 items
Modified 4 months ago

b. The selected Document Library's page will open with all the documents listed in it:

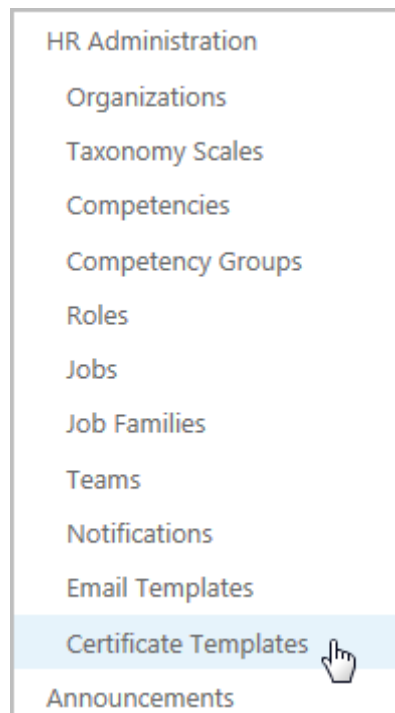
Certificate Templates ⓘ

 New
  Upload
  Sync
  Share
  More

All Certificates Templates Explorer View Selected Pictures ... Find a file 

✓	 Name	Template Name	Validity Period
	 Certificate_Template.png	Certificate	
	 Golden-frame-certificate-template.jpg	Certificate	

2) The second option is to select the Document Library from the Libraries in the left side menu on the Home page:



Note that in this list will be displayed only those Document Libraries that were set to be displayed on the Quick Launch. To view all Document Libraries, please, refer to the first option described in this section.

NOTE: It is assumed that the Document has been created as it is a standard SharePoint functionality.

5.1 Add Attachment

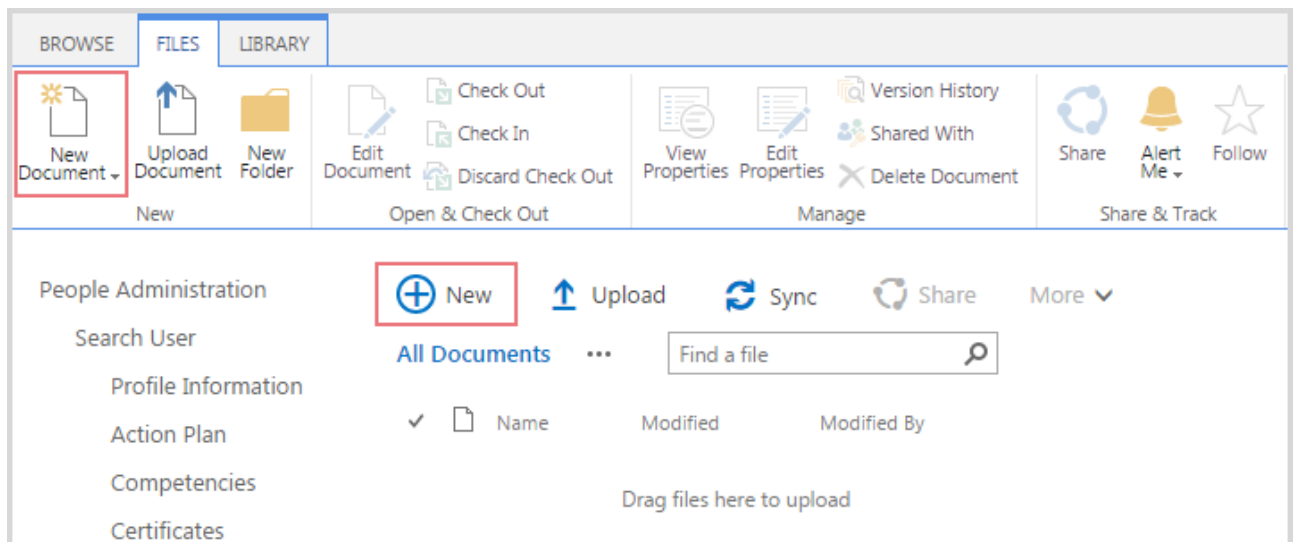
To add new document to the Document Library is a standard SharePoint functionality. To do so, follow the steps below:

1) To open Upload Document form use either one of the options below:

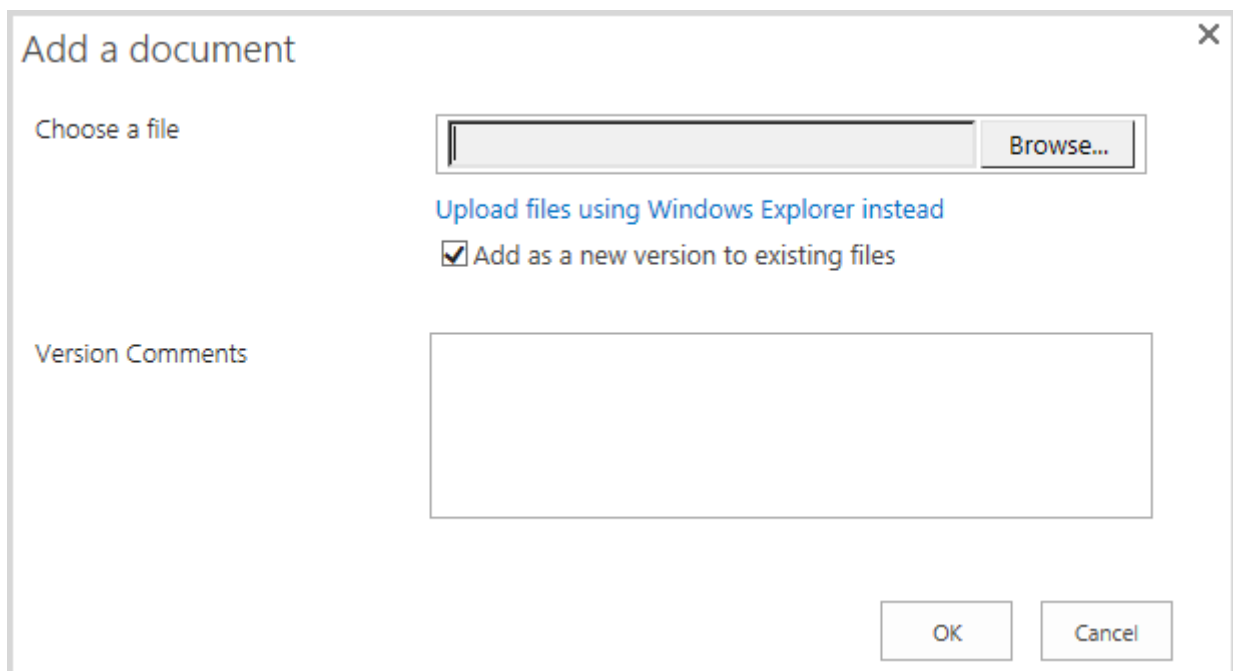
a. From the Document Library's list click New button  ;

OR

b. On the ribbon click New Document:



2) Find the document you want to add to the Document Library:



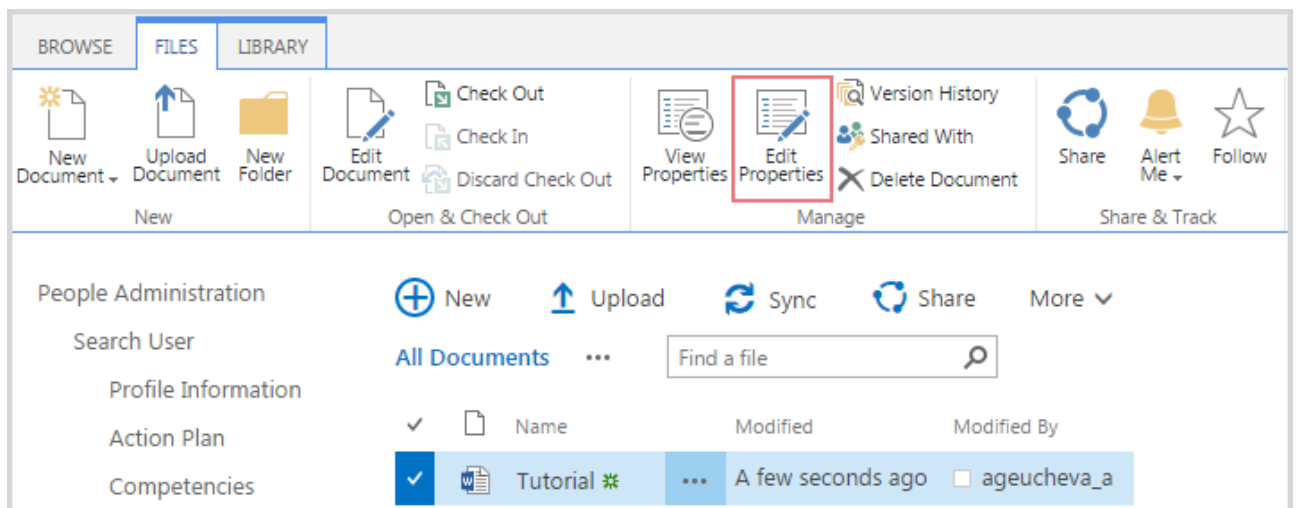
3) Click OK button to upload the selected document or click Cancel to discard the process. You will be redirected back to the list with all documents in the Document Library where newly added document's Name, Modified date and Modified By is displayed.

5.1.1 Edit Attachment's Properties

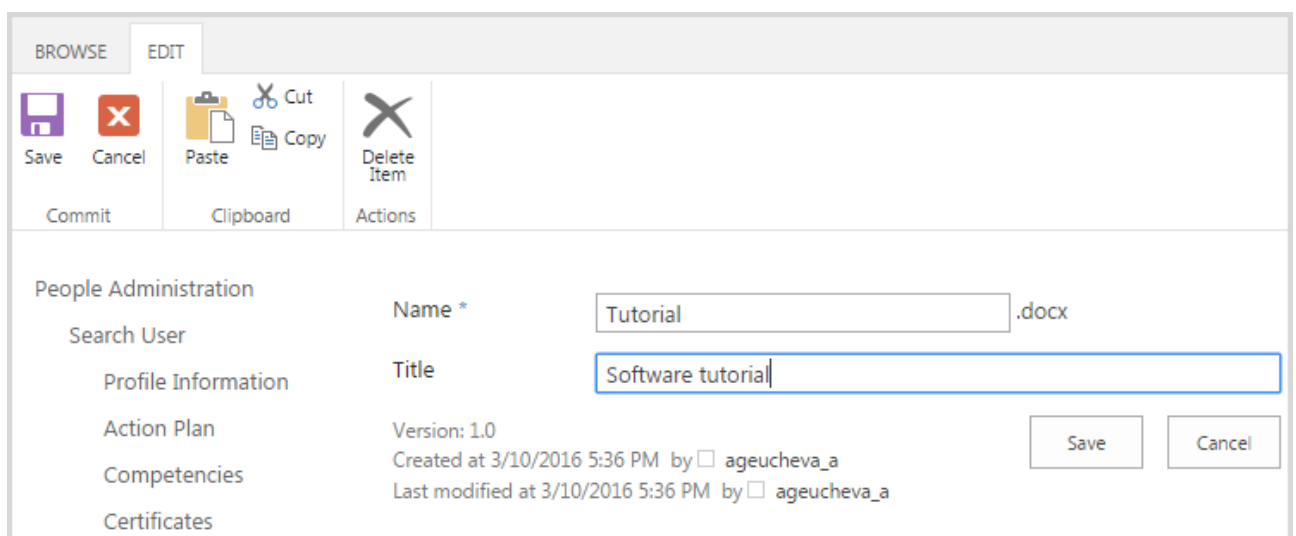
To edit the properties of the document in the Document Library is a standard SharePoint functionality. To do so, follow the steps below:

- 1) To open Edit form use either one of the options below:
 - a. Select the name of the attachment in the list and go to Files tab;

b. Click Edit Properties on the ribbon:



2) Make the necessary changes to the attachment's properties (Name, Title, Created and Modified dates as well as the user name of the person who created and last modified the attachment):



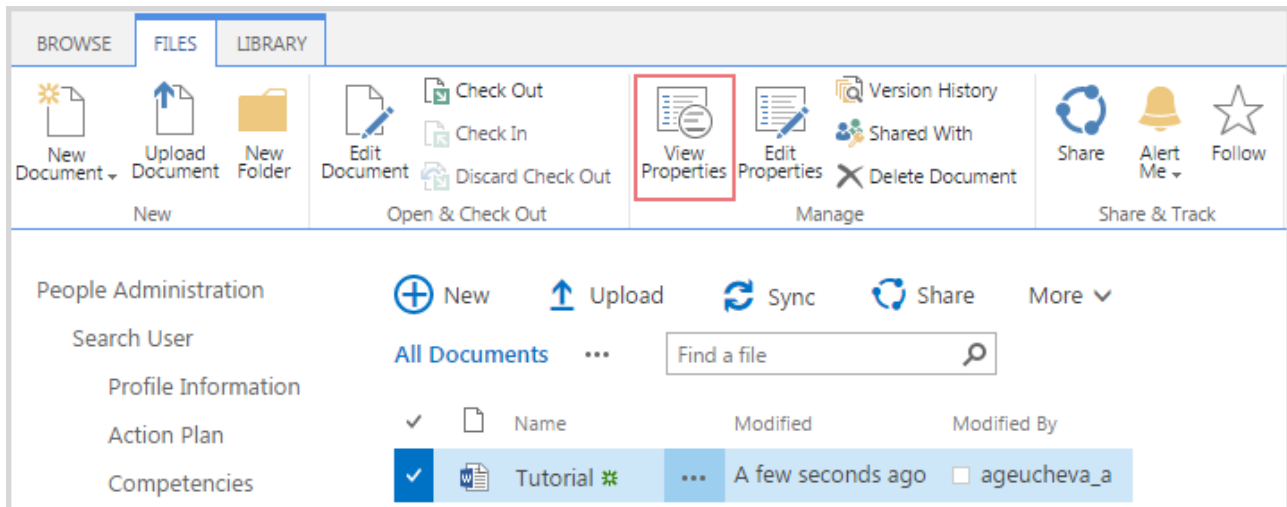
3) Click Save button to save the changes or click Cancel button to discard the process.

Note, please, that from the Edit form the user can also delete the attachment. Please, refer to the [section Delete Attachment](#) for more details.

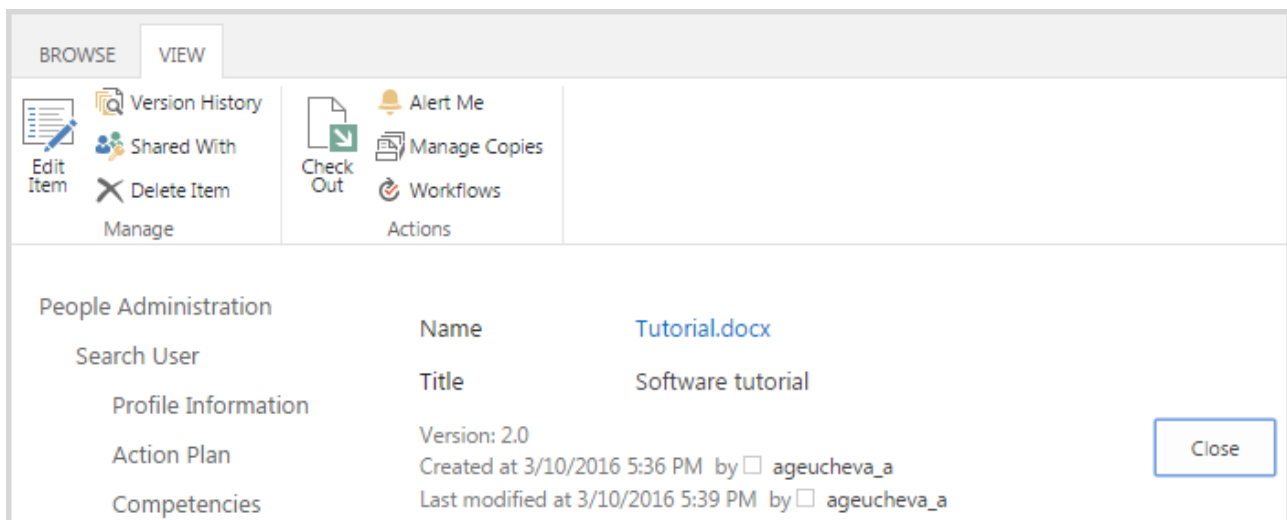
5.1.2 View Attachment's Properties

To view the properties of the document in the Document Library is a standard SharePoint functionality. To do so, follow the steps below:

- 1) To open View form use either one of the options below, select the name of the attachment in the list and go to Files > View Properties from the ribbon:



The View form will display the detailed information about the attachment, including Name, Title, Created and Last Modified dates as well as the user name who uploaded the attachment and last modified it:



- 2) Click Close button to return to the Document Library's list with all attachments.

Note please, that in the View form user has an option to edit attachment's properties and delete the attachment. Please, refer to the [section Edit Attachment's properties](#) and [section Delete Attachment](#) respectively for more information on these functionalities.

NOTE: To view the Attachment's content is the standard SharePoint functionality and is not described in this User Guide.

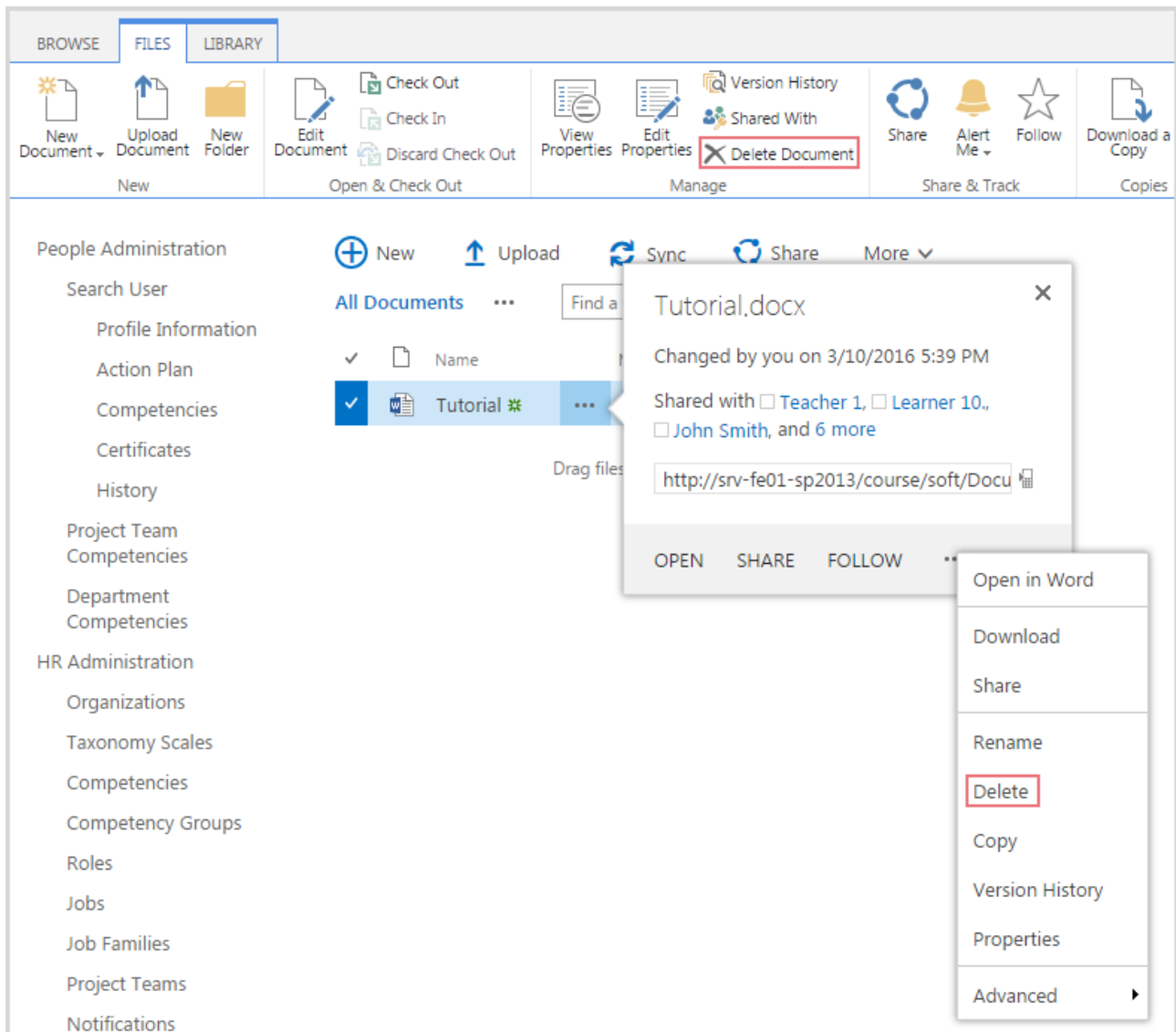
5.1.3 Delete Attachment

To remove the attachment from the Document Library is a standard SharePoint functionality. To do so, follow the steps below:

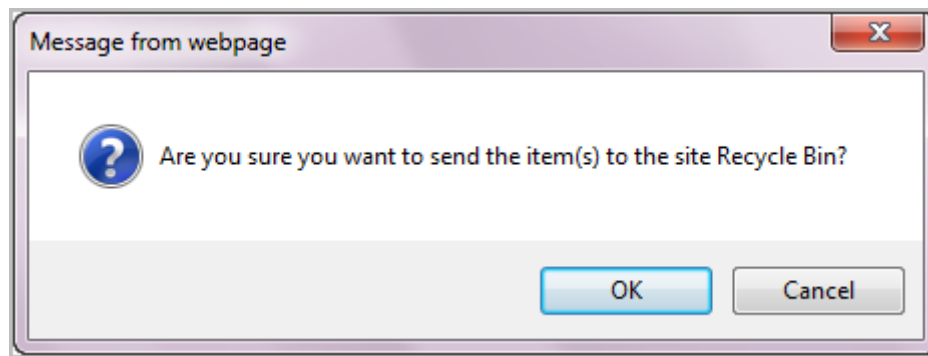
- 1) From the drop-down action list next to the attachment's name click Delete;

OR

- 2) Select the name of the attachment in the list and go to Library Tools > Documents > Delete Document from the ribbon:



- 3) The system asks the user to confirm the decision to permanently remove the selected attachment:



- 4) The user clicks OK button to confirm the decision or Cancel button to discard the process.

The user is redirected back to the Document Library list where the removed attachment is no longer displayed.

6 PEOPLE ADMINISTRATION

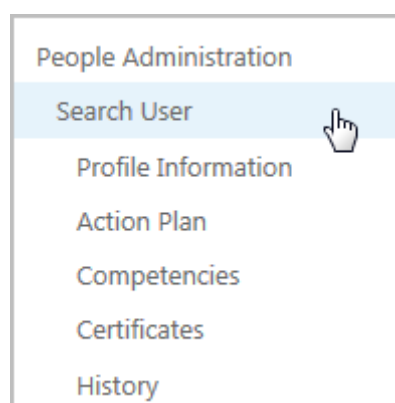
The Employee Record Keeping is the oldest and most basic human resources function. It involves recording, maintaining and retrieving the information related to employees for various organizational needs. Global Administrator has the full administrative control to define the User Profile structure, including the option to allow Employees to self-manage some of their Profiles' properties such as change of contact information or address. Global Administrator has full administrative control to manage Employees Profiles. People Administrator has the ability to search for and view Employee Profiles of his Organization. Project Team Leader has the ability to search and view Employee Profiles of his Project Team members.

The Training & Development function ensures that the employees have the necessary skills and knowledge to perform their jobs effectively. The managers are able to design flexible training programs based on individual needs of each employee. It includes Certification Framework and Competency Competencies to assist manager in the Competencies of employees' proficiency levels. The Training & Development function provides the means of assuring that employees are capable of performing their jobs at acceptable levels.

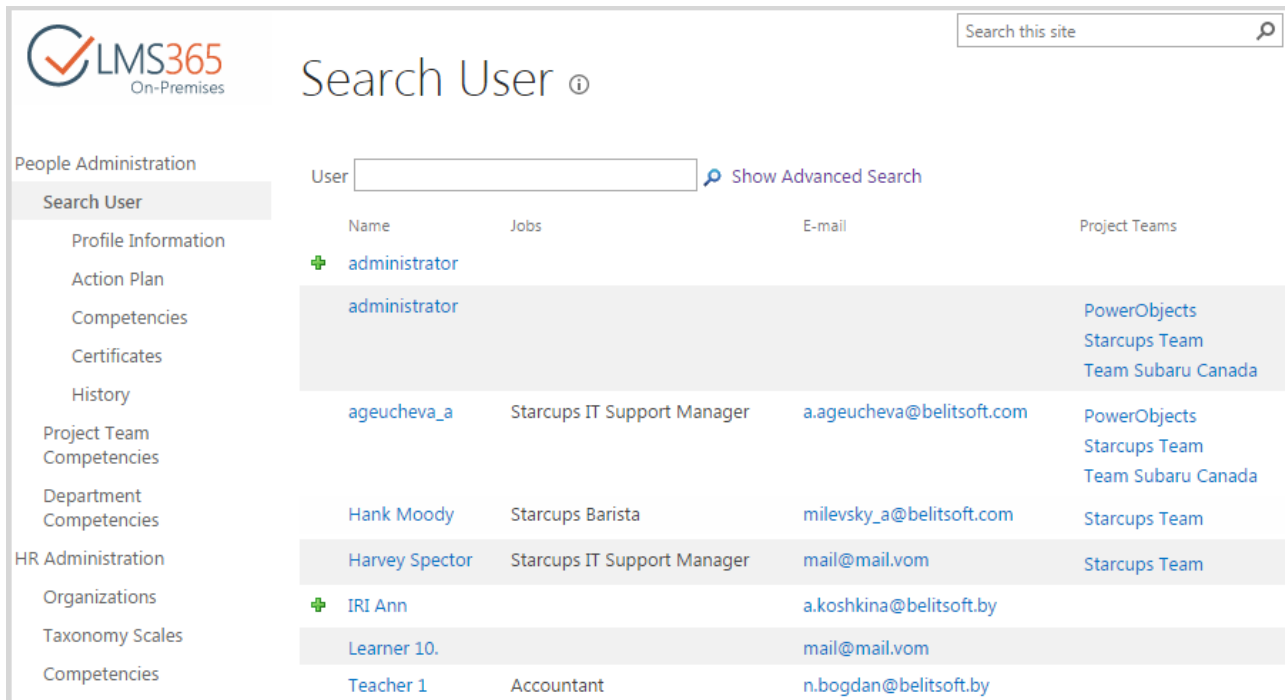
6.1 Search User

In this section you can search users with the help of simple/advanced search. Once user is selected, the menu items 'Profile Info', 'Action Plan', 'Competencies', 'Certificates', 'History' are filtered to this user.

When search is cleared, the mentioned menu items show information for current user, i.e. for user that you're logged under. To go to the Search User page, in the Quick Launch menu from People Administration section choose Search User:



From the Search User page the User can find the employees via entering the user name or partial user name into the search box. The search result includes User Name, Jobs, email and Project Teams:









The screenshot displays the 'Search User' interface in LMS365. At the top left is the LMS365 On-Premises logo. A search bar at the top right contains the text 'Search this site'. Below the logo, the page title 'Search User' is followed by an information icon. A 'User' search input field is present, with a 'Show Advanced Search' link to its right. The main content area is a table with the following columns: Name, Jobs, E-mail, and Project Teams. The table lists several users, including 'administrator', 'ageucheva_a', 'Hank Moody', 'Harvey Spector', 'IRI Ann', 'Learner 10.', and 'Teacher 1'. A green plus icon (+) is visible next to the names 'administrator' and 'IRI Ann'. The left sidebar is divided into 'People Administration' and 'HR Administration' sections, with various sub-options like 'Profile Information', 'Action Plan', 'Competencies', etc. The 'Search User' option is currently selected in the sidebar.

- The (+) icon appears next to the name of the user when there is no Employee profile created for him. Click this icon to create an Employee Profile for the selected user.
- Click on the Name to select the user and place the name in the Selected User box on the right of the Search field.
- Click on the Job to view the Job’s detailed information (see Chapter 4.6.4 [View Job’s details](#) for guidance).
- Click the email address to send an email to the selected user.

6.1.1 View Selected User’s details

Once you have selected the user name, you will be redirected to this employee profile information:

- Profile Information – takes the User to the Profile page of the selected employee;
- Action Plan – takes the User to selected employee’s Action Plan page;
- Competencies - takes the User to selected employee’s Personal Competencies page;
- Certificates – takes the User to the selected employee’s Personal Certifications page;
- History – takes the User to the selected profile’s history page;
- Project Team Competencies – takes the user to selected profile’s project team competencies page;
- Department Competencies - takes the user to selected profile’s department competencies page:

BROWSE	VIEW	
 Edit Item  Version History  Shared With  Delete Item Manage	 Alert Me  Workflows Actions	
People Administration Search User Profile Information Action Plan Competencies Certificates History Project Team Competencies Department Competencies	User Name Title First Name Middle Name Last Name Organization Department Picture Prefix Status Gender Jobs Manager	i:0#.w example\I2 Harvey Spector Harvey Spector CCM Starcups IT Support Manager <input type="checkbox"/> Anastasiya Koshkina
HR Administration Organizations Taxonomy Scales Competencies		

6.1.2 Advanced Search

To do the Advanced Search, the User clicks on Show Advanced Search link to the right of the Search field on the User Search home page.

The advanced search properties are displayed:

- Profile Properties:

[Hide Advanced Search](#)



Profile Properties

Team

Team



Competencies

Competencies

Certificate Templates

Certificate Templates

Status

Valid Suspended Expired

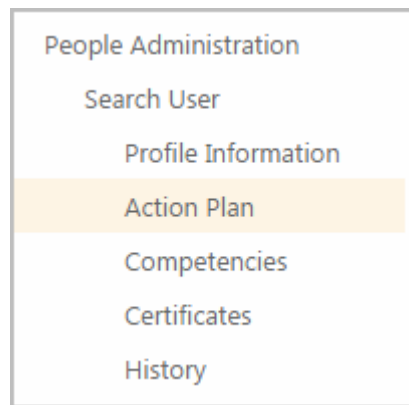
- Profile Properties – The user can fill out any or all of the profile properties and set the search to look for either one or all entered criteria;
- Project Team – the user can choose the specific project team from the drop-down to which the employee he is searching for must belong;
- Certificate Templates – the User can pick one or several Certificate Templates from which the Certifications are generated for an employee he is searching for. The User also chooses the certificate Status (Valid, Expired or Suspended).

Click Search button to start the user search. The results of the search will be displayed on the User Search page under the search area.

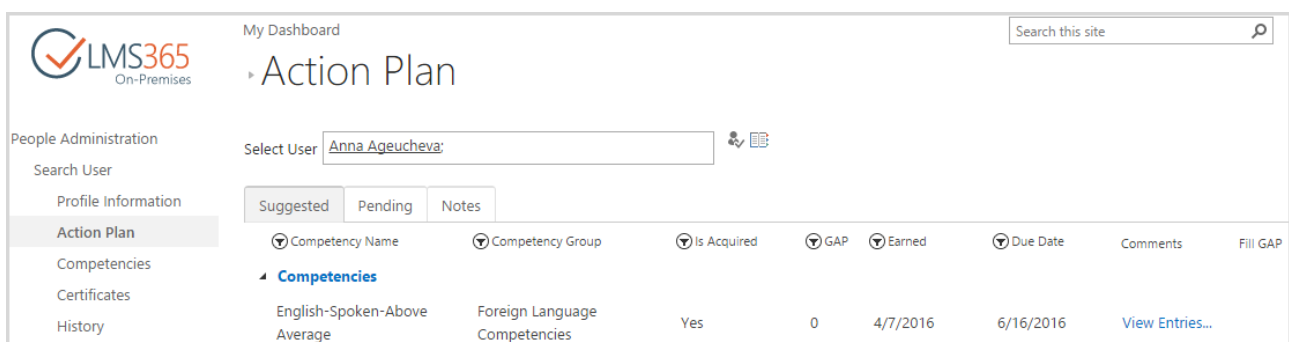
6.2 Action Plan

To access the Action Plan page the People Admin follows the steps below:

- 1) Click Action Plan link in User Tools on the left side menu on the Home page:



The People Admin/Manager is redirected to the Action Plan page where he can search for the employee to view his Action Plan:




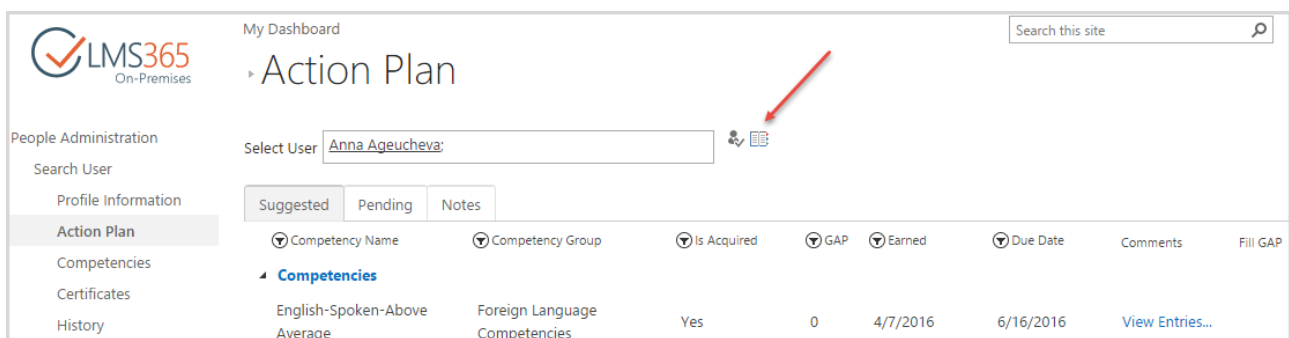
6.2.1 View Employee's Action Plan

To view the Action Plan of the particular employee, the People Admin can

- 1) Pick the Employee from the list of employees for whom the Action Plan have been created on the Action Plan home page;

OR

- 2) Search for the employee by entering the user name or selecting the user name with the help of the user picker by clicking on the Browse icon  next to the search field:

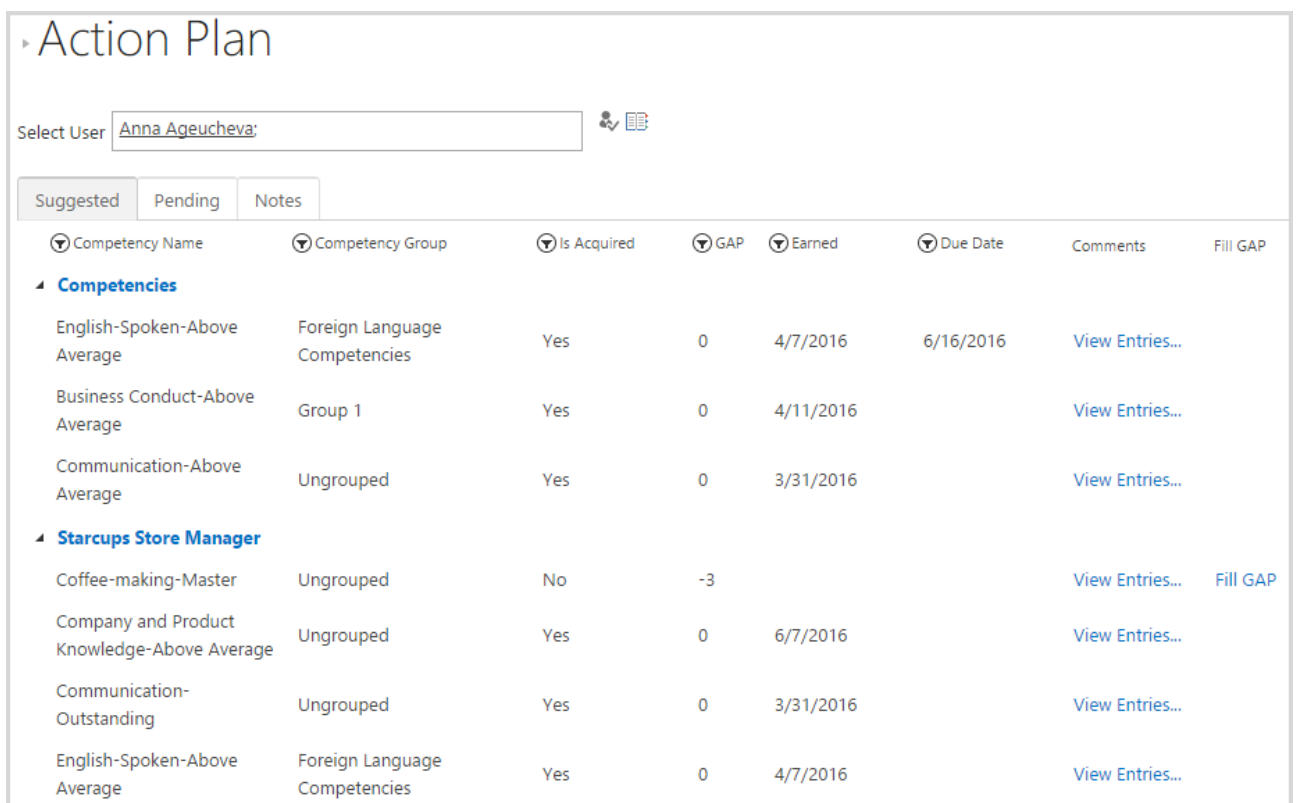


Note, please, that in case if the user searches for the employee for whom the Action Plan has NOT been created, the system will automatically create the Action Plan for this employee once the user clicks Go to Action Plan button.

NOTE: Manager can view Action Plan for his subordinates only.

The user is redirected to the Employee's Action Plan page with three tabs:


- *Suggested* tab displays competencies suggested to user via Action Plan and grouped by Roles. The following information is displayed in the table:



Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
Competencies							
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	
Business Conduct-Above Average	Group 1	Yes	0	4/11/2016		View Entries...	
Communication-Above Average	Ungrouped	Yes	0	3/31/2016		View Entries...	
Starcups Store Manager							
Coffee-making-Master	Ungrouped	No	-3			View Entries...	Fill GAP
Company and Product Knowledge-Above Average	Ungrouped	Yes	0	6/7/2016		View Entries...	
Communication-Outstanding	Ungrouped	Yes	0	3/31/2016		View Entries...	
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016		View Entries...	


- o Competency Name – the name of the suggested Competency (and its Level);
- o Competency Group – name of group in which the competency is included;
- o Is Acquired – shows whether the suggested item has been acquired by the employee or not yet;
- o Gap – shows the difference between held competency level and suggested competency level;
- o Earned – displays the date when the competency was earned;
- o Due Date – displays the date by which the suggested competency should be acquired;
- o Comments – contains links to competency comments;
- o Fill Gap – contains 'Fill Gap' link which allows to grant the suggested competency manually or enroll employee into corresponding REM course:

Select option to assign the competency ✕



Grant Competency Manually

Use this option to grant the competency.



Enroll into a Course

Select a course that provides the competency and enroll.

If you select to Grant Competency Manually, a warning is displayed to the User notifying that he is upgrading the Competency's Level. The Competency with the required level is already selected in the Competency field:

Select option to assign the competency ✕

EDIT

Save	Cancel	Paste	Copy	Delete Item	Spelling
Commit		Clipboard		Actions	Spelling

Competency * Living the Values-Outstanding (5) ▾

You are trying upgrade **Harvey Spector** from **Living the Values-Below Average** to **Living the Values-Outstanding**.

Comments


[Click for help about adding basic HTML formatting.](#)

No existing entries.


Version: 1.0
Created at 3/11/2016 11:19 AM by ageucheva_a
Last modified at 3/11/2016 11:19 AM by ageucheva_a

Click Save button to assign the Competency or Cancel button to discard the process. The User is redirected back to the Action Plan page with the upgraded User Level for the Competency and Acquired status 'Yes':

▶ Action Plan


Select User 

Suggested Pending Notes

Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
Competencies							
English-Spoken-Above Average	Foreign Language Competencies	Yes 	0	4/7/2016	6/16/2016	View Entries...	
Business Conduct-Above Average	Group 1	Yes	0	4/11/2016		View Entries...	
Communication-Above Average	Ungrouped	Yes	0	3/31/2016		View Entries...	

If you select to Enroll into a Course, the system will show a list of courses that provide the needed Competency level:

Select a course that provides the needed competency ✕

Course Title	Description	Competencies	Site
New Course	short description text	English - Spoken-Above Average	REM 

Click the Course Title link to view Course Details page in modal window where you can view more information about the course:

New Course

COURSE DESCRIPTION
detailed description text

EVENT DETAILS

Location	Room	Starts	Ends	Availability	Show Interest	Action
		3/17/2016 12:00 AM	3/21/2016 12:00 AM	Places Available	Show Interest	Enroll
New York, NY, 51st Street W	Panorama View (30)	3/17/2016 12:00 AM	3/23/2016 12:00 AM	Places Available	Show Interest	Enroll

COURSE DETAILS
 Teacher(s): Anna Annaaaaa
 Type: Classroom Training
 Duration: 30d
 Category: General Employee Training
 CEU Points: 40
 Competencies: English - Spoken-Above Average, English Language-Above Average

After you close the modal window, you can proceed with enrollment. Select the needed course and select Course Offering for enrollment (if several are available):

Select the Course Offering you like to enroll into...

Location	Starts	Ends	Time Zone	Teachers	Availability
	3/17/2016 12:00 AM	3/21/2016 12:00 AM		Anna Annaaaaa	Places Available
New York, NY, 51st Street W	3/17/2016 12:00 AM	3/23/2016 12:00 AM		Anna Annaaaaa	Places Available


An enrollment form will be opened with the appropriate user selected automatically:

Enroll in - Accounting Expert - Offline Course ✕

User Information Add Multiple Users

▶ Select existing users to enroll

Mary Jane Stevens;



Accept
Terms and Conditions

Click OK button to enroll the user to course or Cancel button to discard the process. An Enrollment Confirmation message without any redirect buttons is displayed to confirm successful enrollment:


Confirmation of Enrollment ✕

The selected user(s) has been enrolled into the training course "Accounting Expert - Offline Course"

NOTE: Manager can enroll himself and his subordinates only.

An e-mail notification is sent automatically to this learner after successful enrollment.

- *Pending* tab displays competencies that are being acquired via SharePoint REM Courses:


My Dashboard

▶ Action Plan

People Administration

Search User

Profile Information

Action Plan

Competencies

Certificates

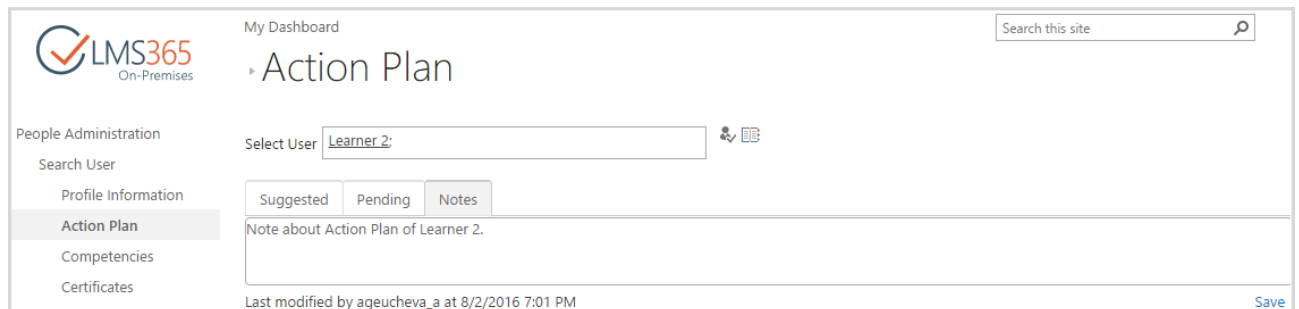
History

Select User

Competency Name	Competency Group	Is Acquired	Assigned	Due Date	Comments
Business Conduct-Above Average	All	No	7/28/2016		View Entries...
English-Spoken-Above Average	All	No	7/28/2016		View Entries...

- Competency Name – the name of the pending Competency (and its Level);
- Competency Group – name of group in which the competency is included;

- Is Acquired – shows whether the pending item has been acquired by the employee or not yet;
 - Assigned – displays the date when pending competency was assigned to a Learner;
 - Due Date – the day by which the pending competency should be acquired;
 - Comments – contains links to the competency comments.
- *Notes* tab contains text field for comments about employee’s action plan. Manager can add his comments and save changes to them. For employees this field is read-only.

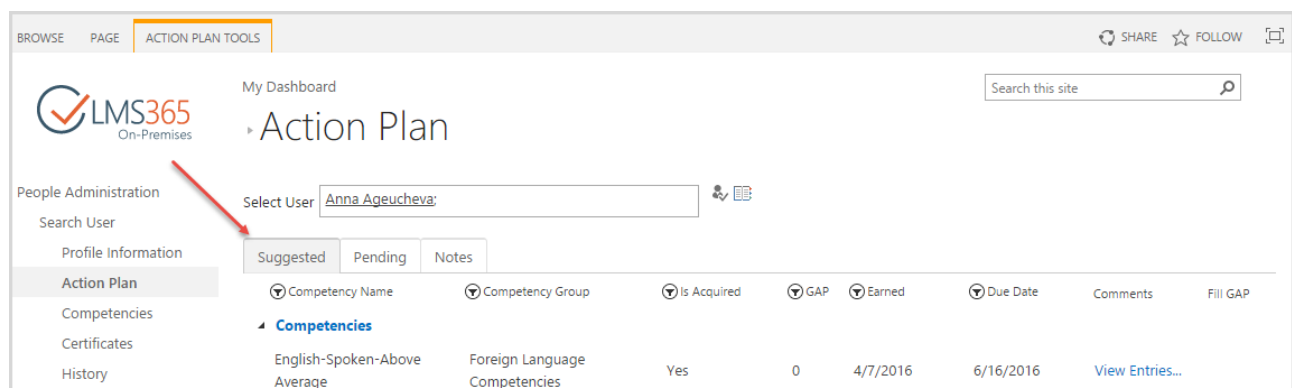


6.2.2 Add New Item to Action Plan

Two types of items can be added to action plan: competencies and roles.

To suggest new Competency to action plan, follow the steps below:

- 1) Go to employee’s Action plan, select Suggested tab:



- 2) In the ribbon menu select Action Plan Tools > Suggest Competency:

BROWSE PAGE ACTION PLAN TOOLS SHARE FOLLOW

Suggested Items

People Administration

Search User

Profile Information

Action Plan

Competencies

Certificates

History


Suggested Pending Notes


Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	


3) Fill in the Action Plan - New Item form:


Action Plan - New Item ✕


EDIT



Save
Commit


Cancel



Paste
Clipboard


Cut
Copy


Attach File
Actions


ABC
Spelling
Spelling

Competency * ✕ Competency 2-Average (3)
+ Add new

Due Date 

Comments

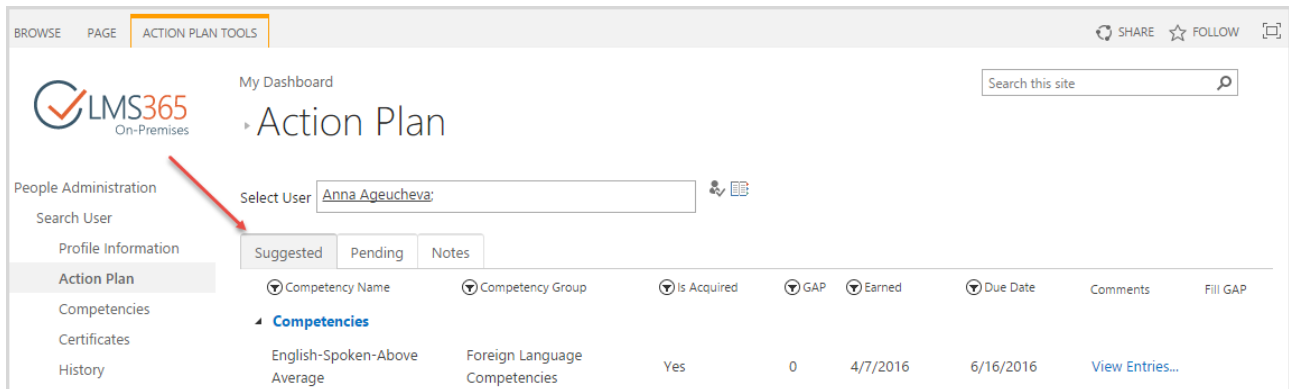
[Click for help about adding basic HTML formatting.](#)
 These notes are visible for administrators (users who can manage action plan) only.

- a. Add Competency using competency picker;
- b. Optionally choose the date by which the suggested item should be acquired;
- c. Optionally add any comments that may explain the reason for suggesting an item;

- d. Click Save button to add new item to the Action Plan or click Cancel button to discard the process.

To suggest new Role to action plan, follow the steps below:

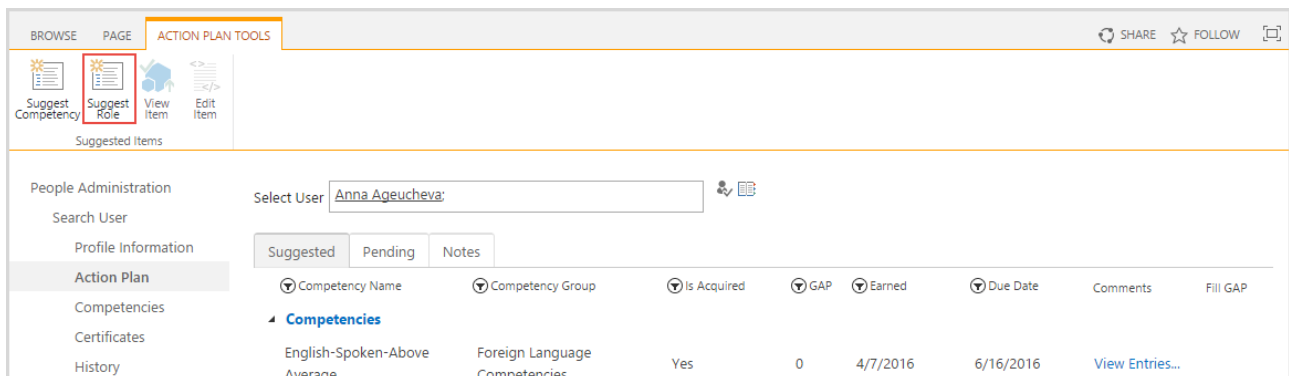
- 1) Go to employee's Action plan, select Suggested tab:



The screenshot shows the LMS365 interface for an Action Plan. The 'ACTION PLAN TOOLS' ribbon is active. The user 'Anna Ageucheva' is selected. The 'Suggested' tab is selected in the 'Suggested', 'Pending', and 'Notes' tabs. The table below shows the following data:

Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
Competencies							
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	

- 2) In the ribbon menu select Action Plan Tools > Suggest Role:




The screenshot shows the LMS365 interface for an Action Plan. The 'ACTION PLAN TOOLS' ribbon is active. The 'Suggest Role' button is highlighted with a red box. The user 'Anna Ageucheva' is selected. The 'Suggested' tab is selected. The table below shows the following data:


Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
Competencies							
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	


- 3) Fill in the Action Plan - New Item form:



Action Plan - New Item
✕


EDIT



 Save
Commit




 Cancel


 Paste



 Cut

 Copy


 Attach
 File


 ABC
 Spelling
▼

Role *  

Competency 4-Above Average


Due Date 

Comments

[Click for help about adding basic HTML formatting.](#)
 These notes are visible for administrators (users who can manage action plan) only.

Save

Cancel

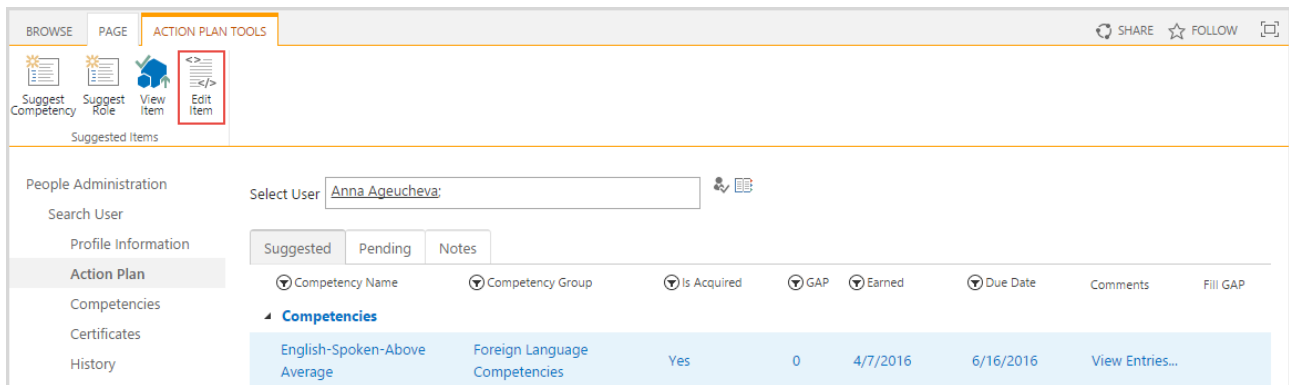
- a. Enter the title of the Role or pick the name from the list via Browse icon  to the right of the title field;
- b. Optionally choose the date by which the suggested role should be acquired;
- c. Optionally add any comments that may explain the reason for suggesting an item;
- d. Click Save button to add new item to the Action Plan or click Cancel button to discard the process.

When new item is created the User is redirected back to the employee's Action Plan list where new item is displayed.

6.2.3 Edit Suggested Item in Action Plan

To make the changes to the item in the Action Plan, People Admin/Manager follows the steps below:

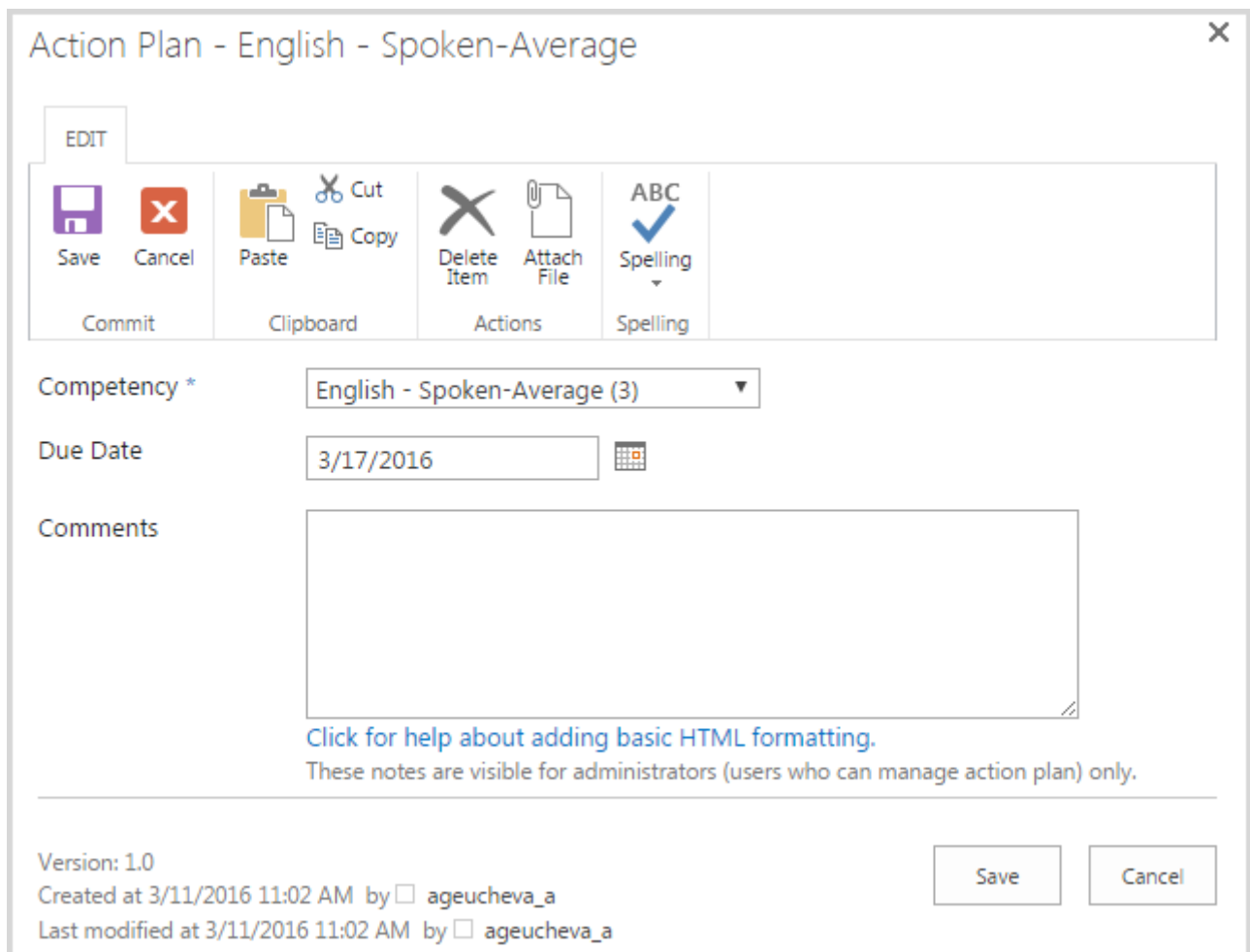
- 1) Choose the item in the Action Plan list;
- 2) On the ribbon go to Items tab and click Edit Item button:



The screenshot shows the 'ACTION PLAN TOOLS' tab in the LMS365 interface. The 'Edit Item' button is highlighted. Below the navigation bar, there is a 'People Administration' section with a search for 'Anna Ageucheva'. A table of competencies is displayed, with the following data:

Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	

3) Make the necessary changes to the suggested item in the Edit form:



The screenshot shows the 'Action Plan - English - Spoken-Average' edit form. The form includes a toolbar with buttons for Save, Cancel, Paste, Copy, Delete Item, Attach File, and Spelling. The 'Competency' field is set to 'English - Spoken-Average (3)'. The 'Due Date' field is set to '3/17/2016'. The 'Comments' field is empty. Below the comments field, there is a link for help about adding basic HTML formatting and a note that these notes are visible for administrators only. At the bottom, there are 'Save' and 'Cancel' buttons.

4) Click Save button to save the changes or click Cancel button to discard the process.

The user is redirected back to the employee's Action Plan.

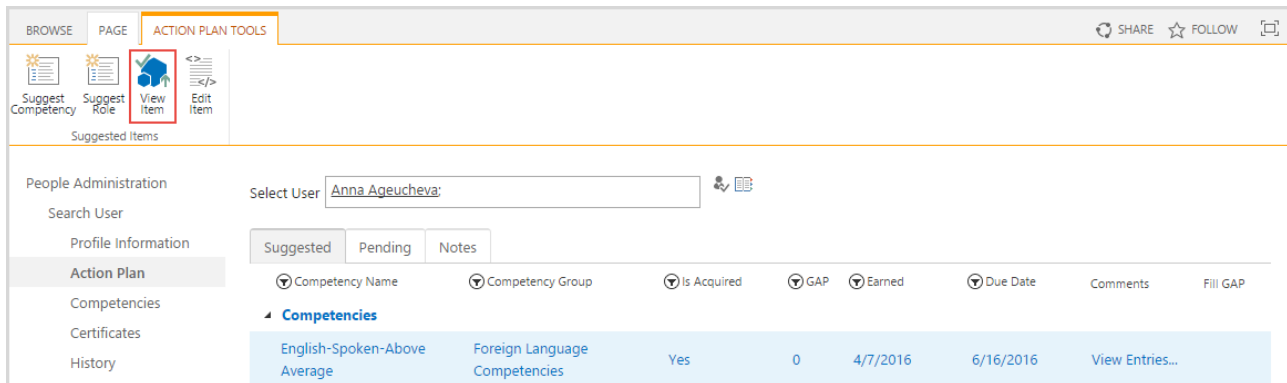
6.2.4 View Suggested Items details

The user can see the details of the suggested item of the Action Plan in the View form:

- 1) Click on the item's Title;

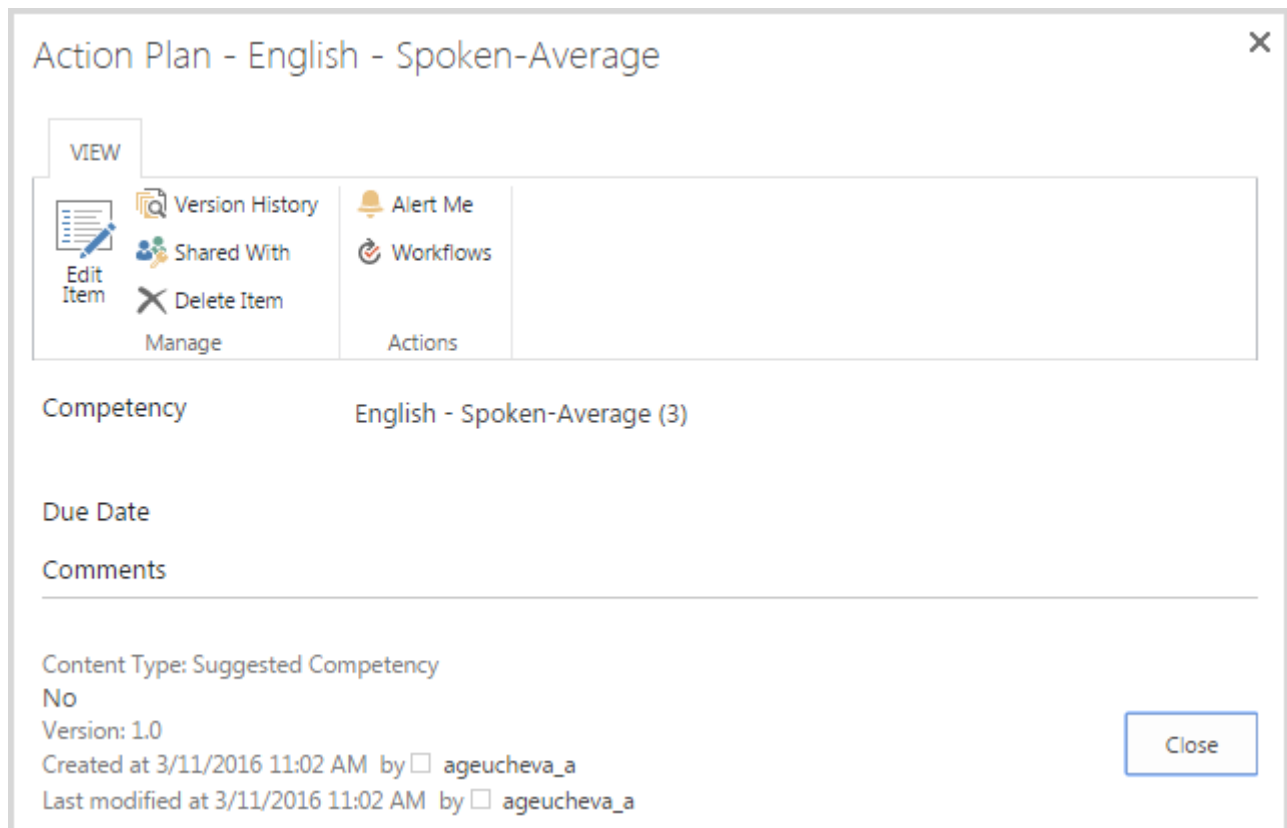
OR

- 2) On the ribbon go to Items tab and click View Item button:



Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	

- 3) The system will open the View form with the details of the selected item. The user can see the name of the suggested item, due date and comments:



Competency English - Spoken-Average (3)

Due Date

Comments

Content Type: Suggested Competency
 No
 Version: 1.0
 Created at 3/11/2016 11:02 AM by ageucheva_a
 Last modified at 3/11/2016 11:02 AM by ageucheva_a

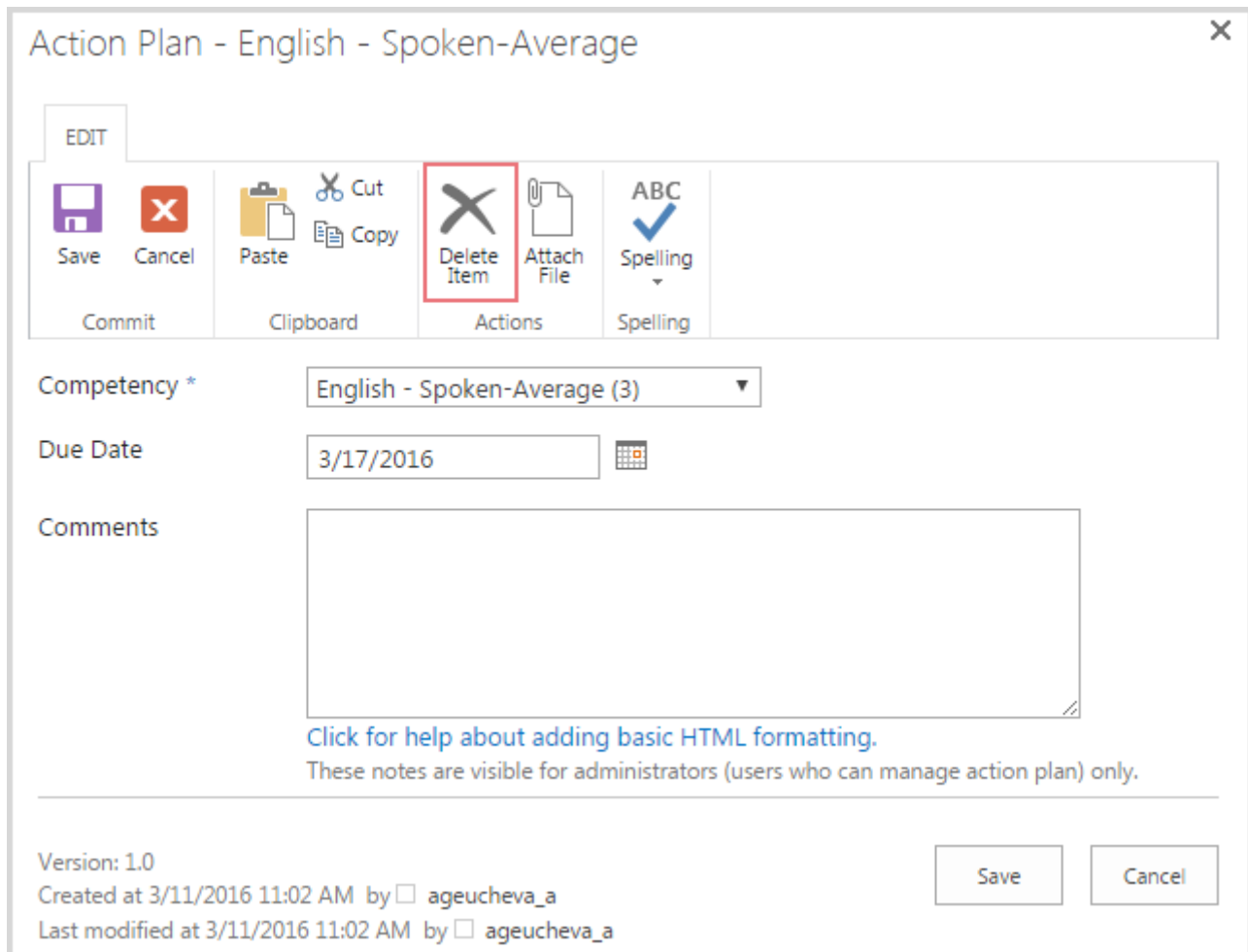
[Close](#)

- 4) Click Close button to return to the employee's Action Plan list.

6.2.5 Delete Suggested Item from the Action Plan

To remove a suggested item from the Action Plan, manager follows the steps below:

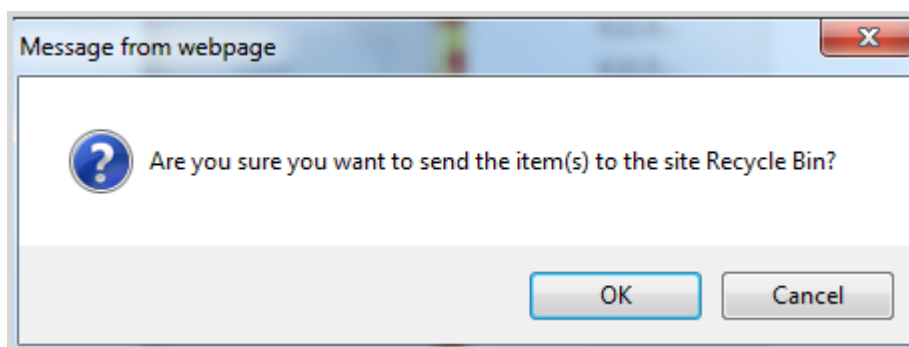
- 1) On the ribbon go to the Items tab and open the Edit item form;
- 2) Click Delete Item button in the ribbon:



The screenshot shows the 'Action Plan - English - Spoken-Average' edit form. The ribbon at the top has an 'EDIT' tab selected. The ribbon contains several groups of buttons: 'Commit' (Save, Cancel), 'Clipboard' (Paste, Cut, Copy), 'Actions' (Delete Item, Attach File), and 'Spelling' (ABC, Spelling). The 'Delete Item' button is highlighted with a red box. Below the ribbon, there are fields for 'Competency *' (English - Spoken-Average (3)), 'Due Date' (3/17/2016), and 'Comments'. At the bottom, there is a metadata section with 'Version: 1.0', 'Created at 3/11/2016 11:02 AM by ageucheveva_a', and 'Last modified at 3/11/2016 11:02 AM by ageucheveva_a'. There are 'Save' and 'Cancel' buttons at the bottom right.

Note, please, that the option to delete the item from the Action Plan is also available from the View and Edit forms for the suggested item.

- 3) System displays the message asking to confirm the decision to remove the suggested item:



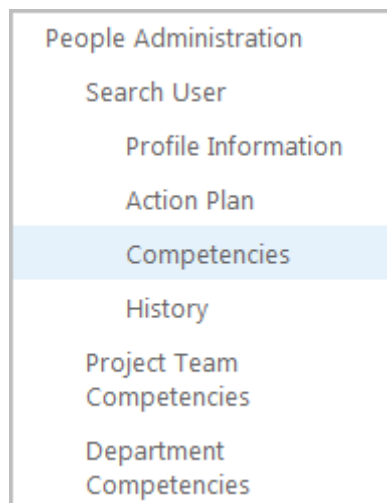
- 4) Confirm the decision by clicking OK button or click Cancel button to discard the process.

6.3 Competencies Management



For Competency Framework to be effective, People Administrator and Project Team Leader (called User in this section for convenience) have to have the option to perform the Competencies of the Competencies held by Employees in order to facilitate the training and development of the workforce.

To assess employee's competencies, the user should go to Personal Competencies page where he will be able to search for an employee who's Competency Gap he wants to assess:


- 1) Click Competencies link from User Tools on the left side menu on the Home page:



The system will redirect the User to the Personal Competencies page where the user can find an employee that is to be assessed:

- 2) Click on Browse icon  next to the search field to pick the user name or enter the user name in the search box.
- 3) Click Check Names icon  to see the Competencies and the Gaps for the selected user:

Competencies

Select User: 

Title	User Level	Required	Suggested	GA...	Earned	Comments	Fill GAP
Foreign Language Competencies							
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Ungrouped							
Communication	1 2 3 4 5	4	5 (Starcups Store Manager)	0	3/31/2016	View Entries...	

User is able to search for an employee whose proficiency he wishes to assess.

He will be able to filter the Competencies of an employee by clicking on one of the following tabs:

- Held – the list of Competencies will be displayed that are acquired by an employee;
- Required – the list of Competencies that are required for The Job held by an Employee (this list is populated from the Roles list of the Job the employee is holding where the required Competencies are listed);
- Revoked – the list of Competencies that have been automatically revoked when the certificate that granted the competency has expired;

NOTE: An option to automatically revoke competencies when certificate expires is available during course creation in Certificate Expiration settings.
For detailed information about this option see [chapter 4.1.9.1 in LMS365 On-Premises REM User Guide](#).

- All – the full list of Competencies of an employee is displayed.

6.3.1 View Employee's Personal Competencies

User follows the steps to go to view the Competencies Gap of a particular employee:

- 1) Enter the employee's user name into a search field or find the employee with the help of the user picker by clicking on Browse icon:

▶ Competencies

Select User

Held Required Revoked All

Title	User Level	Required	Suggested	GA...	Earned	Comments	Fill GAP
Foreign Language Competencies							
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Ungrouped							
Communication	1 2 3 4 5	4	5 (Starcups Store Manager)	0	3/31/2016	View Entries...	

- 2) The list of Held Competencies of the selected employee grouped by Competency Groups is displayed by the system on the Personal Competencies page:

▶ Competencies

Select User

Held Required Revoked All

Title	User Level	Required	Suggested	GA...	Earned	Comments	Fill GAP
Foreign Language Competencies							
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Ungrouped							
Communication	1 2 3 4 5	4	5 (Starcups Store Manager)	0	3/31/2016	View Entries...	

- Title – the name of the Competency. Items are grouped by Competency Group;
- User Level – the Competency Level that is currently held by an employee (the level is marked by a colored frame);
- Required – the Competency Level that is required for the Job the employee holds;
- Suggested – the Competency Level that the User suggested for an employee in an Action Plan;
- GAP – the difference between the User Level and Required level of the Competency:
 - It is zero if User Level \geq Required;
 - It is negative if User level $<$ Required;
- Earned – the date when Competency was earned;
- Comments – comments made on user’s competency;

- Fill GAP – link to filling GAP (displayed only for competencies with GAPs).

6.3.1.1 View User Level Details

To see the details about the particular User Level, the user should point over its value with the mouse in the User Level column. The name for the User Level is displayed in the pop up:

Select User <input type="text" value="Anna Ageucheva"/>							
Held	Required	Revoked	All				
Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Group 1							
Business Conduct	1 2 3 4 5				4/11/2016	View Entries...	
Technical Competencies							

User level value: 5
 User level: **Outstanding**
 Behavioral indicators: perfect written and oral skills
Outstanding value from scale is 5

6.3.1.2 Add Comments for Competency

The user is able to add Comments for the selected Competency of an Employee that is going to be visible only for managers. The link Read More in Comments column of Personal Competencies opens the User Competency Comments form that allows the User to read the existing Comments and add a new Comment for the Competency:

View Competency Comments ✕

Comments to Harvey Spector's suggested item: "English - Spoken-Average"

ageucheva_a added a comment - 3/11/2016 12:59:17 PM

User level has advanced, certification for higher level is recommended.

Add new comment:

Add Comment
Close

- 1) Write a new Comment in the Comments;
- 2) Click Save button to add a Comment or Cancel button to discard the process.

6.3.2 Grant Competency

The User has an option to add new Competency for an employee from the employee's Personal Competencies page:

- 1) On the ribbon click Grant Competency button in Competencies Tools from Personal Competencies:

BROWSE PAGE **COMPETENCIES TOOLS** SHARE FOLLOW

Grant Competency
View Competency
Edit Competency
View Competency History
Suggest Competency
View Suggested Competency
Edit Suggested Competency
Fill GAP
View Certificates

Personal Competencies | Suggested Competencies | Required Competencies

People Administration Select User:

Search User

Profile Information

Action Plan

Competencies

Certificates

History

Project Team Competencies

Department Competencies

HR Administration

Organizations

Held Required Revoked All

Title User Level Required Suggested GAP Earned Comments Fill GAP

Foreign Language Competencies

English Language	1 2 3 4 5	3	3 (Standard)	0	3/11/2016	View Entries...
------------------	-----------	---	--------------	---	-----------	---------------------------------

Group1

Communications	1 2 3 4 5	Not Present	4	Not Present	3/11/2016	View Entries...
Living the Values	1 2 3 4 5	5	5	0	3/11/2016	View Entries...

2) Fill out the Personal Competency-New Item form:

Personal Competencies - New Item ✕

EDIT

Save
 Cancel

Paste
 Copy

Cut
 Spelling

Commit
Clipboard
Spelling

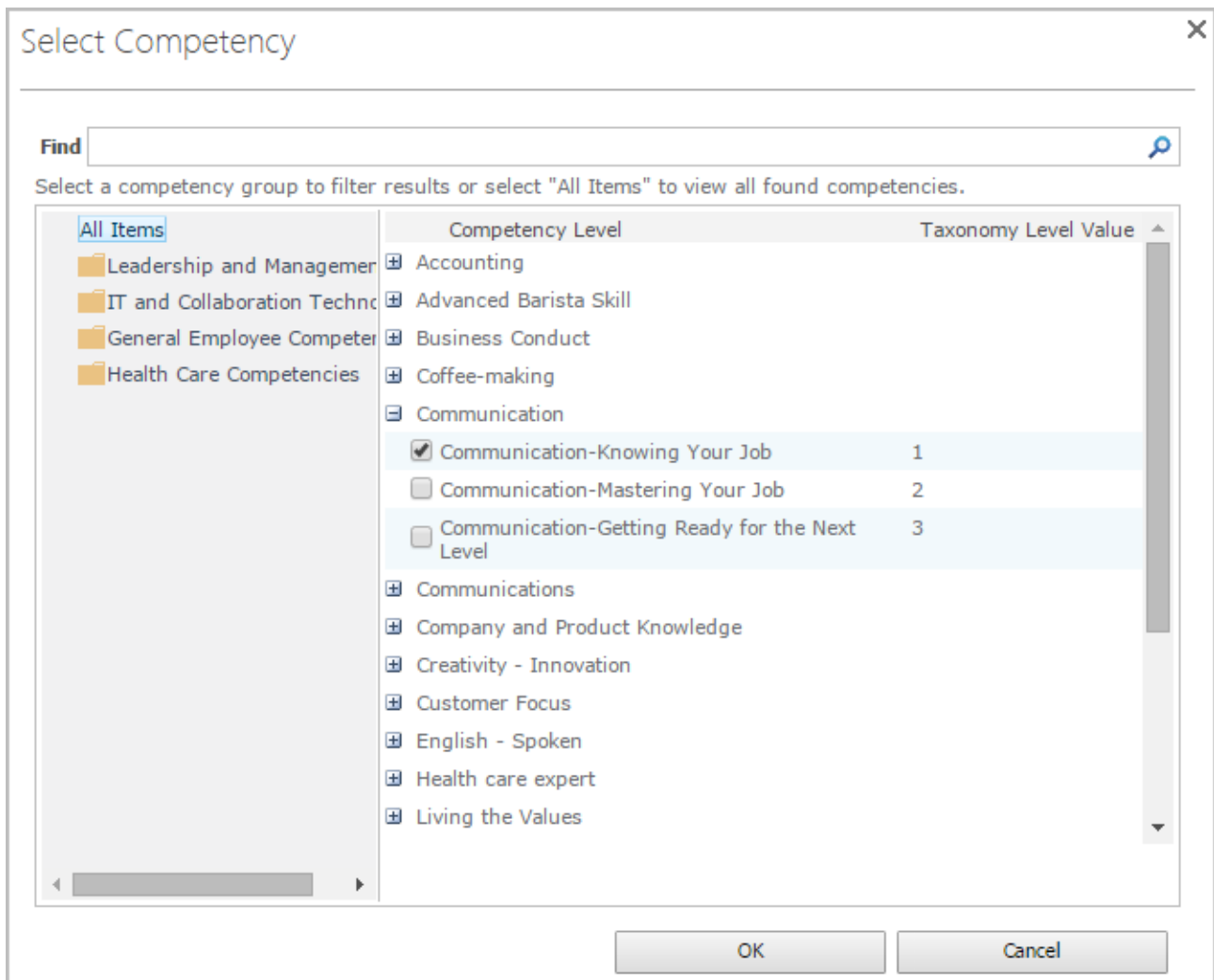
Competency * No Selection
+ Add new

Issued Date *

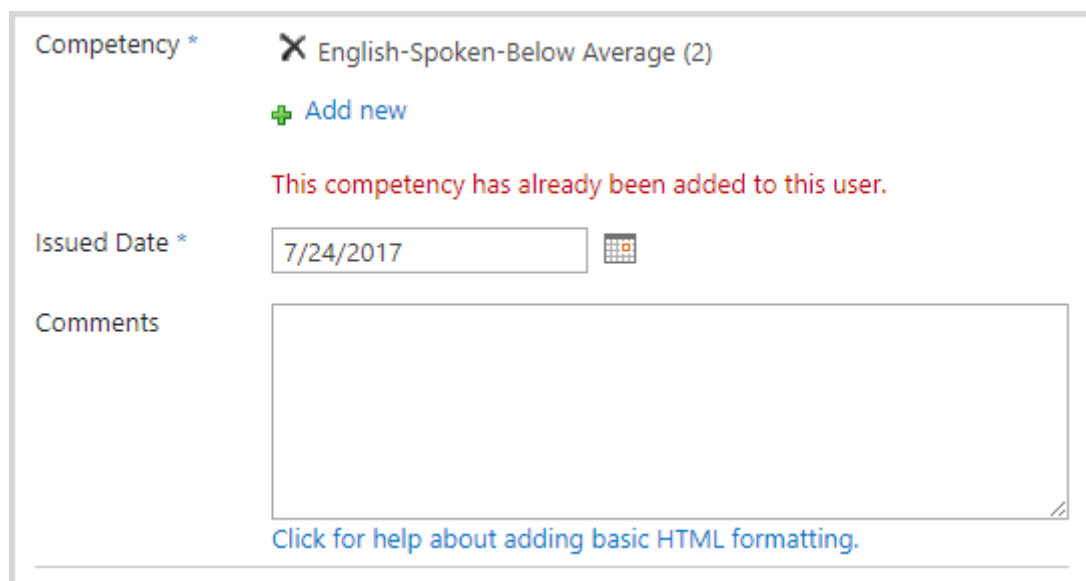
Comments

Click for help about adding basic HTML formatting.

1. Choose the Competency using Competency Picker:



If the selected Competency is already in the Personal Competencies list, the system will notify the user:



In such case, the User can either select different Competency by clicking Select Competency button or click Cancel button to discard the process.

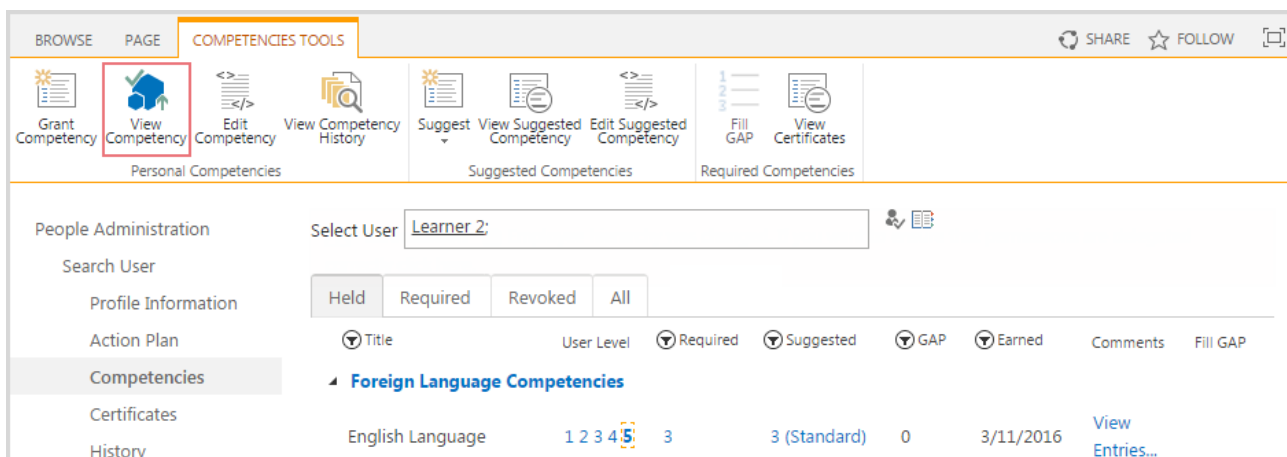
1. Specify Issued Date of the granted competency (by default, current date is set). This date will be displayed as Earned Date in Competencies page as well as in web reports;
2. Optionally add any comments to the Competency that is to be added to the employee's Personal Competencies list;
3. Click Save button to add the Competency to Employee's Personal Competencies or click Cancel to discard the process.

Granted Competency is added to the Employee's Competencies list and is displayed in the Competencies page.

6.3.3 View Competency

The manager has an option to view Competency's details for an employee from the employee's Personal Competencies page:

- 1) On the ribbon click View Competency button in Competencies Tools from Personal Competencies:









Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English Language	1 2 3 4 5	3	3 (Standard)	0	3/11/2016	View Entries...	

- 2) View the Competency level and Comments on the Personal Competency-View form. The system will open the details form for the selected Competency with Competency's name and Comments (with the author and date):

Personal Competencies - English-Spoken-Below Average ✕

VIEW

<p> Edit Item</p> <p> Delete Item</p> <p style="text-align: center;">Manage</p>	<p> Version History</p> <p> Shared With</p>	<p> Alert Me</p> <p> Workflows</p> <p style="text-align: center;">Actions</p>
---	---	---

Competency	English-Spoken-Below Average (2)
Issued Date	7/24/2017
Comments	No existing entries.

Content Type: Personal Competency
Version: 1.0
Created at 7/24/2017 4:34 PM by ageucheva_a
Last modified at 7/24/2017 4:34 PM by ageucheva_a

Close

Note please that the user has an option to Edit and Delete the Competency from the Personal Competencies of an employee from the View form. Please, refer to the [Edit Competency](#) section and [Delete Competency](#) section respectively for more information on these functionalities.

6.3.4 Edit Competency

The manager has an option to update Competency for an employee from the employee's Personal Competencies page:

- 1) On the ribbon click Edit Competency button in Competencies Tools from Personal Competencies:

BROWSE PAGE **COMPETENCIES TOOLS** SHARE FOLLOW

Grant Competency View Competency **Edit Competency** View Competency History Suggest View Suggested Competency Edit Suggested Competency Fill GAP View Certificates

Personal Competencies Suggested Competencies Required Competencies

People Administration Select User

Search User Profile Information Action Plan **Competencies** Certificates History Project Team Competencies Department Competencies HR Administration Organizations

Held Required Revoked All

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English Language	1 2 3 4 5	3	3 (Standard)	0	3/11/2016	View Entries...	
Group1							
Communications	1 2 3 4 5	Not Present	4	Not Present	3/11/2016	View Entries...	
Living the Values	1 2 3 4 5	5	5	0	3/11/2016	View Entries...	

2) Make the necessary changes in the Edit form that will open:

Personal Competencies - English-Spoken-Below Average

EDIT

Save Cancel Paste Copy Delete Item Spelling

Commit Clipboard Actions Spelling

Competency *

Issued Date *

Comments


[Click for help about adding basic HTML formatting.](#)
No existing entries.


Version: 1.0
Created at 7/24/2017 4:34 PM by ageucheva_a
Last modified at 7/24/2017 4:34 PM by ageucheva_a


Save Cancel


- 3) Change the Competency Level by choosing the new Level from the drop-down list in the Competency field. The system will warn the user about his action to Upgrade the Level (as on the screen shot above) or downgrade the level. Optionally, write a comment in the Comments field to explain the changes made:


EDIT



Save
Commit



Cancel


Paste
Clipboard


Cut
Clipboard



Copy


Delete Item
Actions


Spelling
Spelling

Competency * English-Spoken-Average (3) ▼

You are trying to upgrade **Learner 2** from **English-Spoken-Below Average** to **English-Spoken-Average**.

Issued Date * 7/24/2017 

Comments

[Click for help about adding basic HTML formatting.](#)

No existing entries.

Version: 1.0

Created at 7/24/2017 4:34 PM by ageucheva_a

Last modified at 7/24/2017 4:34 PM by ageucheva_a

Save

Cancel

- 4) Change Issued Date of the granted competency. Changes will be displayed in the Earned Date column on Competencies web part as well as in web reports;
- 5) Click Save button to save the changes to the Competency or click Cancel button to discard the process.

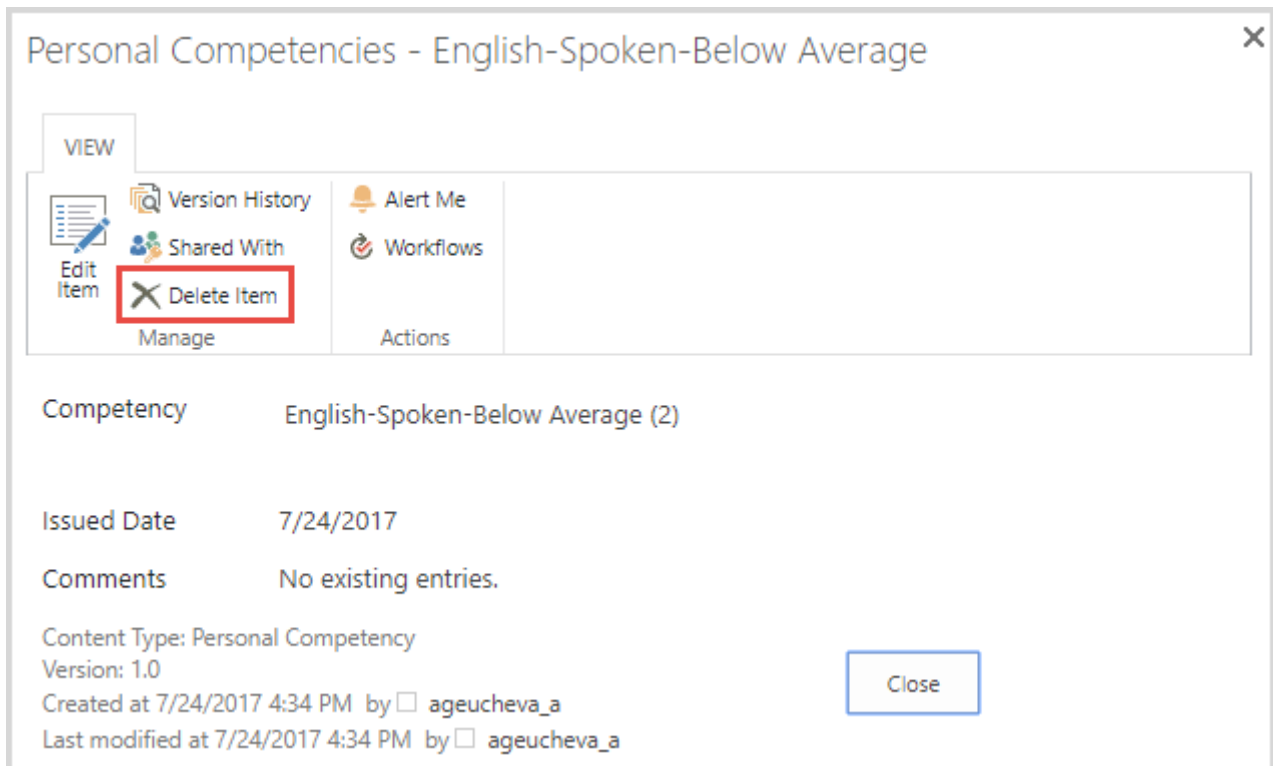
NOTE: Changes in Personal Held Competencies of an Employee are reflected in the Project Team Profiles of which he is a project team member: the system updates the Project Team Competencies list and recalculates Project Team's Held Taxonomy Levels of the Competencies.

6.3.5 Delete Competency

The manager has an option to delete Competency for an employee from the employee's Personal Competencies page.

Note please that the option to delete user's competency is available only from the View and Edit forms for the suggested item.

- 1) Select the competency you want to delete and open it for view or edit;
- 2) Click Delete Item in the ribbon menu:



Personal Competencies - English-Spoken-Below Average

VIEW

[Edit Item](#)
[Version History](#)
[Alert Me](#)
[Shared With](#)
[Workflows](#)

[Delete Item](#)

Manage Actions

Competency English-Spoken-Below Average (2)

Issued Date 7/24/2017

Comments No existing entries.

Content Type: Personal Competency
Version: 1.0

Created at 7/24/2017 4:34 PM by ageucheva_a

Last modified at 7/24/2017 4:34 PM by ageucheva_a

Close

Personal Competencies - English-Spoken-Below Average

EDIT

Save Cancel Paste Cut Copy Delete Item Spelling

Competency * English-Spoken-Below Average (2)

Issued Date * 7/24/2017

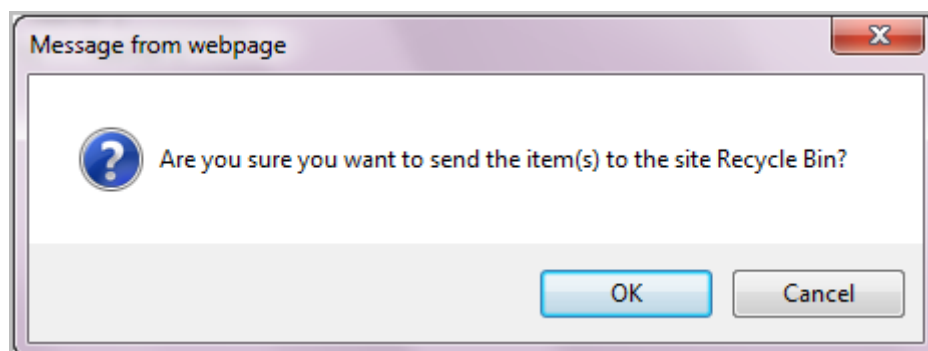
Comments

Click for help about adding basic HTML formatting.
No existing entries.

Version: 1.0
Created at 7/24/2017 4:34 PM by ageucheva_a
Last modified at 7/24/2017 4:34 PM by ageucheva_a

Save Cancel

3) System displays the message asking to confirm the decision to remove the suggested item:

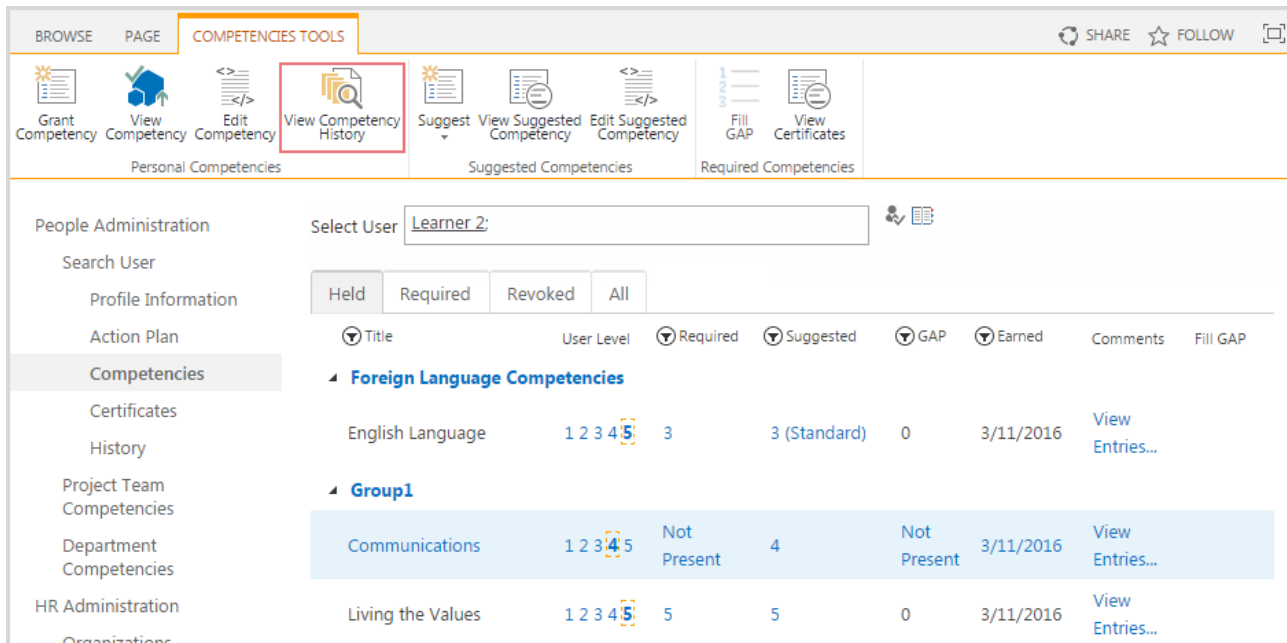


4) Confirm the decision by clicking OK button or click Cancel button to discard the process.

6.3.6 View Competency History

The User can view the history of all updates/changes made to the selected Competency:

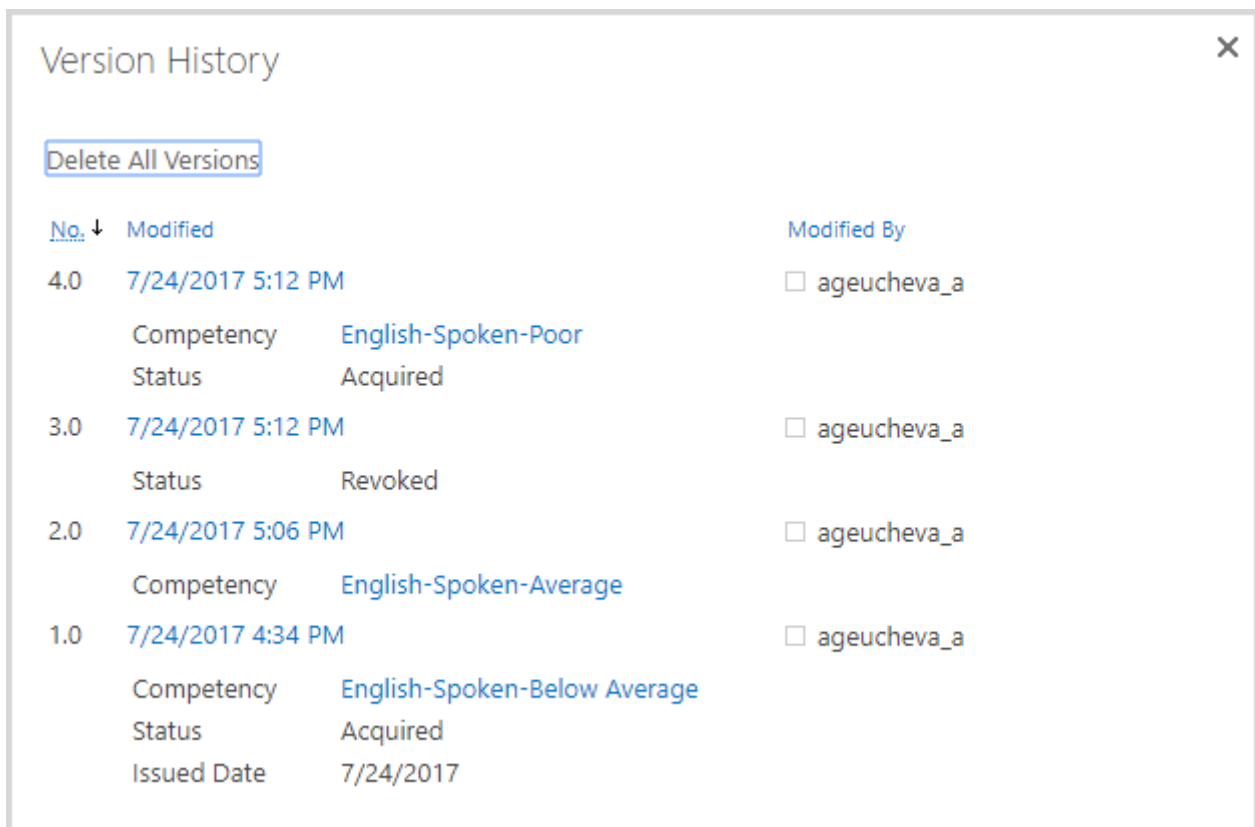
- 1) On the ribbon click View Competency History button in Competencies Tools from Personal Competencies:



The screenshot shows the 'COMPETENCIES TOOLS' ribbon with the 'View Competency History' button highlighted. Below the ribbon, the 'People Administration' section is active, showing a table of competencies for 'Learner 2'.

Select User								
Learner 2								
Search User								
Profile Information								
Action Plan								
Competencies								
Certificates								
History								
Project Team Competencies								
Department Competencies								
HR Administration								
Organizations								
Held		Required						
Revoked		All						
Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP	
Foreign Language Competencies								
English Language	1 2 3 4 5	3	3 (Standard)	0	3/11/2016	View Entries...		
Group1								
Communications	1 2 3 4 5	Not Present	4	Not Present	3/11/2016	View Entries...		
Living the Values	1 2 3 4 5	5	5	0	3/11/2016	View Entries...		

The system will display the list of all versions for the selected Competency (Name and Level) with version No., Date it was modified and by whom the change was made:

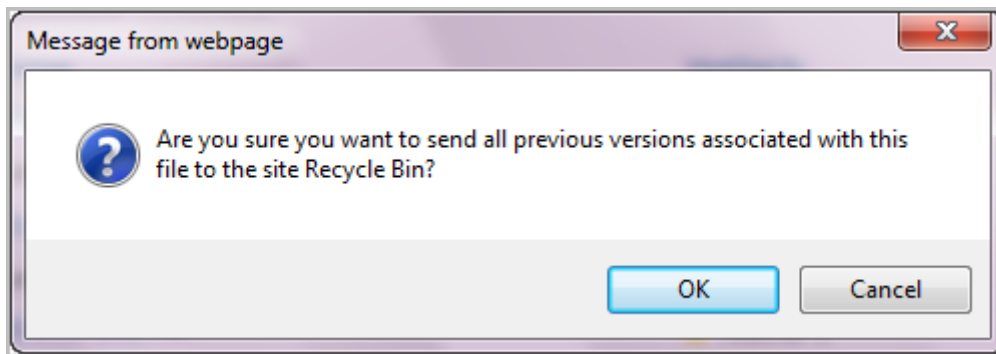


The 'Version History' dialog box displays a list of competency versions. A 'Delete All Versions' link is visible at the top.

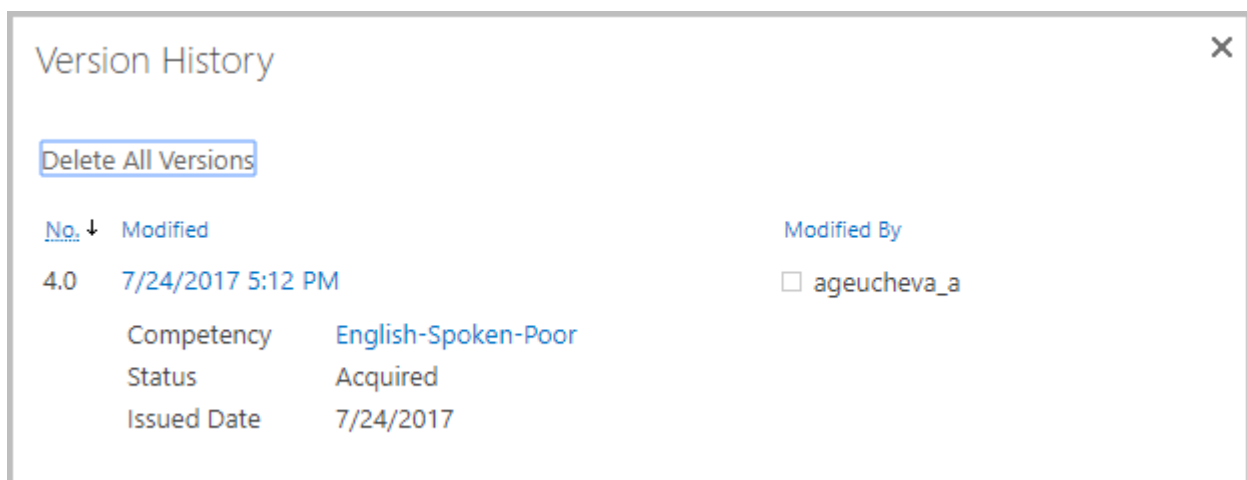
No. ↓	Modified	Modified By
4.0	7/24/2017 5:12 PM	<input type="checkbox"/> ageucheva_a
	Competency: English-Spoken-Poor	
	Status: Acquired	
3.0	7/24/2017 5:12 PM	<input type="checkbox"/> ageucheva_a
	Status: Revoked	
2.0	7/24/2017 5:06 PM	<input type="checkbox"/> ageucheva_a
	Competency: English-Spoken-Average	
1.0	7/24/2017 4:34 PM	<input type="checkbox"/> ageucheva_a
	Competency: English-Spoken-Below Average	
	Status: Acquired	
	Issued Date: 7/24/2017	

- 2) The User can delete all the previous versions by clicking on Delete All Versions link.

The system will ask to confirm the decision to remove all the versions except the last one:



- 3) Confirm the decision by clicking OK button or click Cancel button to discard the process. All the versions will be deleted except the very last:



- 4) Close the form to return to the employee's Personal Competencies page.

6.3.7 Suggest Competency

The User can suggest new Competency to the employee:

- 1) On the ribbon click Suggest and choose Suggest Competency in Competencies Tools from Suggested Competencies:

The screenshot shows the 'COMPETENCIES TOOLS' ribbon with the following options: Grant Competency, View Competency, Edit Competency, View Competency History, Suggest, View Suggested Competency, Edit Suggested Competency, Fill GAP, and View Certificates. The 'Suggest' dropdown menu is open, showing 'Suggest Competency' (Add new Suggested Competency) and 'Suggest Role' (Suggest Role). The 'Suggest Competency' option is highlighted with a red box. Below the ribbon, the 'People Administration' section is visible, including a search bar for 'Anna Ageucheva' and a table of competencies.

Held	Required	Revoked	All
Title			
User Level			
Required			
Suggested			
Foreign Language Competencies			
English Language			
1	2	3	4
3			
3 (Standard)			

- 2) Fill out the Action Plan - New item form. The Suggested Competency is automatically added to the Action Plan and will be displayed in the Competency list. Refer to the [Add New item to Action Plan](#) section for details on how to fill out the form.

6.3.8 View Suggested Competency

To view the detailed information on the Suggested Competency the User should follow the steps below:

- 1) Select the Competency with the suggested level;
- 2) On the ribbon click View Suggested Competency in Competencies Tools:

The screenshot shows the 'View Suggested Competency' form. The 'View Suggested Competency' option is highlighted with a red box. The form displays details for the selected competency, including the user 'Anna Ageucheva', the title 'English-Spoken', the user level '4', and the suggested level '4 (Starcups Store Manager)'. The table below shows the details for the selected competency.

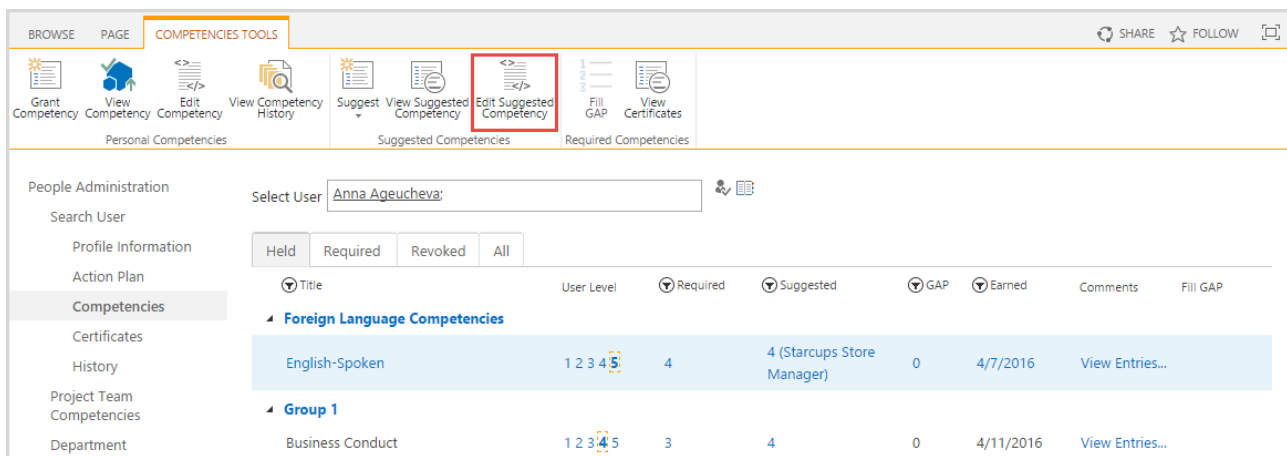
Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Group 1	1 2 3 4 5	3	4	0	4/11/2016	View Entries...	

The system will display the View form for the selected Competency. Please refer to the [section View Suggested Item's details](#) for more information.

6.3.9 Edit Suggested Competency

To edit the Suggested Competency the User should follow the steps below:

- 3) Select the Competency with the suggested level;
- 1) On the ribbon click Edit Suggested Competency in Competencies Tools:



The screenshot shows the 'COMPETENCIES TOOLS' ribbon with the 'Edit Suggested Competency' icon highlighted. Below the ribbon, the user 'Anna Ageucheva' is selected. The table below shows the competency details:

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Group 1							
Business Conduct	1 2 3 4 5	3	4	0	4/11/2016	View Entries...	

The system will display the Edit form for the selected Competency. Please refer to the [section Edit Suggested Item in Action Plan](#) for more information.

6.3.10 Fill Gap

In case there is a negative GAP present (when the User Level is less than the Required Level for the Competency) the User has an option to fill the GAP. To do so, follow the steps below:

- 1) Select the Competency for which the GAP is negative and needs to be filled
- 2) Click link Fill GAP in the right column or on the ribbon click Fill GAP icon in Competencies Tools:

BROWSE PAGE **COMPETENCIES TOOLS** SHARE FOLLOW

Grant Competency View Competency Edit Competency View Competency History Suggest View Suggested Competency Edit Suggested Competency **1 2 3 Fill GAP** View Certificates

Personal Competencies Suggested Competencies Required Competencies

People Administration Select User

Search User Profile Information Action Plan **Competencies** Certificates History Project Team Competencies Department Competencies HR Administration Organizations Taxonomy Scales

Held	Required	Suggested	Revoked	All	Title	User Level	Required	Suggested	GA...	Earned	Comments	Fill GAP
Foreign Language Competencies												
		1 2 3 4 5	3		English Language		3 (Standard)	0		3/11/2016	View Entries...	
Group1												
		1 2 3 4 5	5		Living the Values		5	0		3/11/2016	View Entries...	
Technical Competencies												
		1 2 3	3		Advanced Barista Skill		2	-3			View Entries...	Fill GAP

NOTE: It is possible to hide this link from users. To do it, open the Competencies web part settings and enable option 'Hide Fill Gap Column From Employee' in Miscellaneous section. The link will still be displayed for managers:

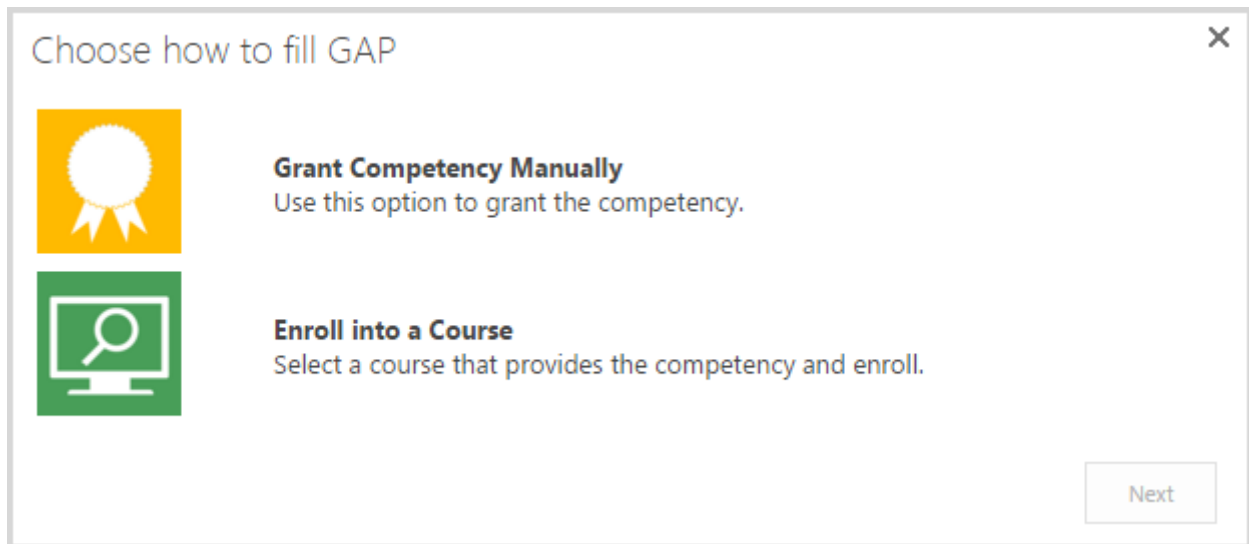
Competencies

- + Appearance
- + Layout
- + Advanced
- Miscellaneous
 - Hide Fill Gap Column From Employee
 - Hide 'Held' tab
 - Hide 'Required' tab
 - Hide 'Suggested' tab
 - Hide 'Revoked' tab
 - Hide 'All' tab

User Mode
Selected

OK Cancel Apply

- 3) The system will suggest to grant the competency manually (for managers only) or enroll employee into corresponding REM course (for managers and employees). Select option and click Next:



If you select to Grant Competency Manually, a warning is displayed to the User notifying that he is upgrading the Competency's Level to close the GAP. The Competency with the required level is already selected in the Competency field:

Fill GAP - Learner 2

EDIT

Save Cancel

Paste Cut Copy

Delete Item Spelling

Commit Clipboard Actions Spelling

Competency * English-Spoken-Outstanding (5) ▼

You are trying to upgrade **Learner 2** from **English-Spoken-Poor** to **English-Spoken-Outstanding**.

Issued Date * 7/24/2017

Comments

Click for help about adding basic HTML formatting.

No existing entries.

Version: 4.0

Created at 7/24/2017 4:34 PM by ageucheva_a

Last modified at 7/24/2017 5:12 PM by ageucheva_a

Save Cancel

Click Save button to close the GAP or Cancel button to discard the process. The User is redirected back to the Personal Competencies page with the upgraded User Level for the Competency and GAP displaying zero to show the GAP is no longer present:


Select User Learner 2:


Held Required Revoked All

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English Language	1 2 3 4 5	3	3 (Standard)	0	3/11/2016	View Entries...	

If you select to Enroll into a Course, the system will show a list of courses that provide the needed Competency level (e.g. if user needs to have competency level 4 and has competency level 2, he will see all courses that provide competency level from 3 to 5):

Select a course that provides the needed competency ✕

Course Title	Description	Competencies	Site
New Course	short description text	English - Spoken-Above Average	REM 

NOTE: If course that provides the needed competency level is locked by Curriculum prerequisites or by Course prerequisites inside the curriculum to which learner is assigned, you will see locked icon  next to it and its title will not be clickable.

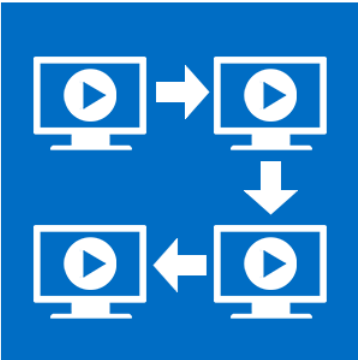
Click the Course Title link to view Course Details page in modal window where you can view more information about the course:

New Course ✕

COURSE DESCRIPTION
detailed description text

EVENT DETAILS

Location	Room	Starts	Ends	Availability	Show Interest	Action
		3/17/2016 12:00 AM	3/21/2016 12:00 AM	Places Available	Show Interest	Enroll
New York, NY, 51st Street W	Panorama View (30)	3/17/2016 12:00 AM	3/23/2016 12:00 AM	Places Available	Show Interest	Enroll



COURSE DETAILS
 Teacher(s): Anna Annaaaaa
 Type: Classroom Training
 Duration: 30d
 Category: General Employee Training
 CEU Points: 40
 Competencies: English - Spoken-Above Average, English Language-Above Average

After you close the modal window, you can proceed with enrollment. Select the needed course and select Course Offering for enrollment (if several are available):

Select the Course Offering you like to enroll into...					
Location	Starts	Ends	Time Zone	Teachers	Availability
	3/17/2016 12:00 AM	3/21/2016 12:00 AM		Anna Annaaaaa	Places Available
New York, NY, 51st Street W	3/17/2016 12:00 AM	3/23/2016 12:00 AM		Anna Annaaaaa	Places Available

An enrollment form will be opened with the appropriate user selected automatically:



Enroll in - Accounting Expert - Offline Course

User Information

Add Multiple Users

▶ Select existing users to enroll

Mary Jane Stevens;

Accept

Terms and Conditions

Click OK button to enroll the user to course or Cancel button to discard the process. An Enrollment Confirmation message without any redirect buttons is displayed to confirm successful enrollment:

Confirmation of Enrollment

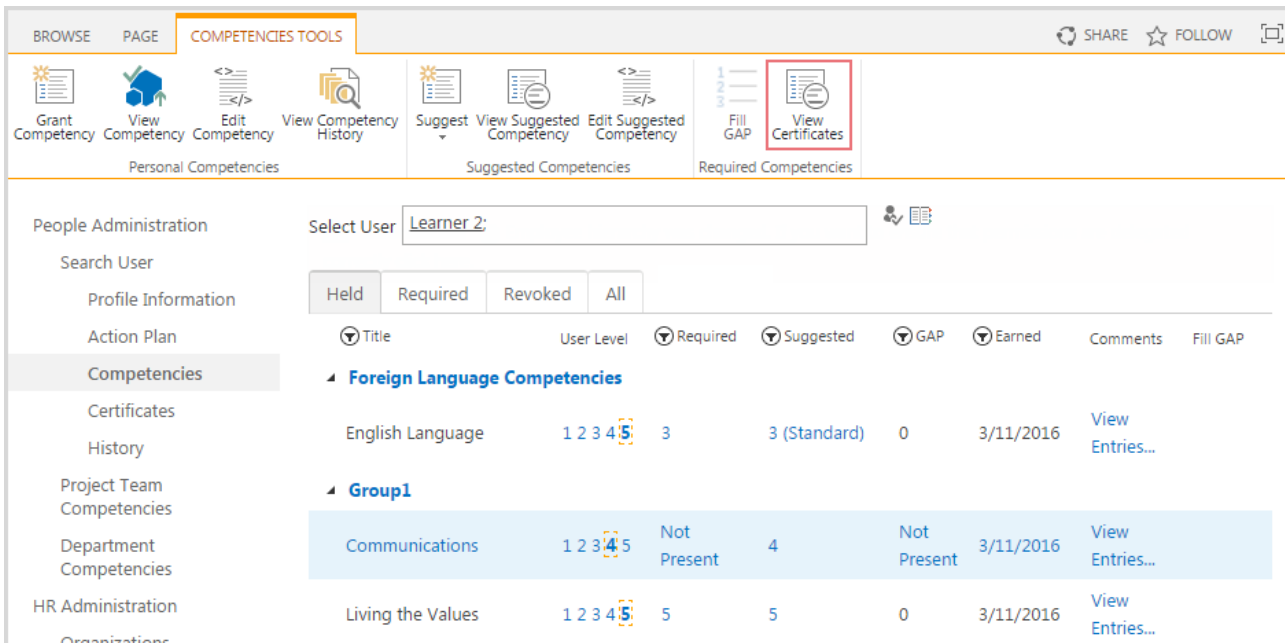
The selected user(s) has been enrolled into the training course "Accounting Expert - Offline Course"

NOTE: Manager can enroll himself and his subordinates only.

An e-mail notification is sent automatically to this learner after successful enrollment.

6.3.11 View Certificates

The User can see the list of the Certificates that an employee holds by clicking on View Certificates on the ribbon in Competencies Tools:

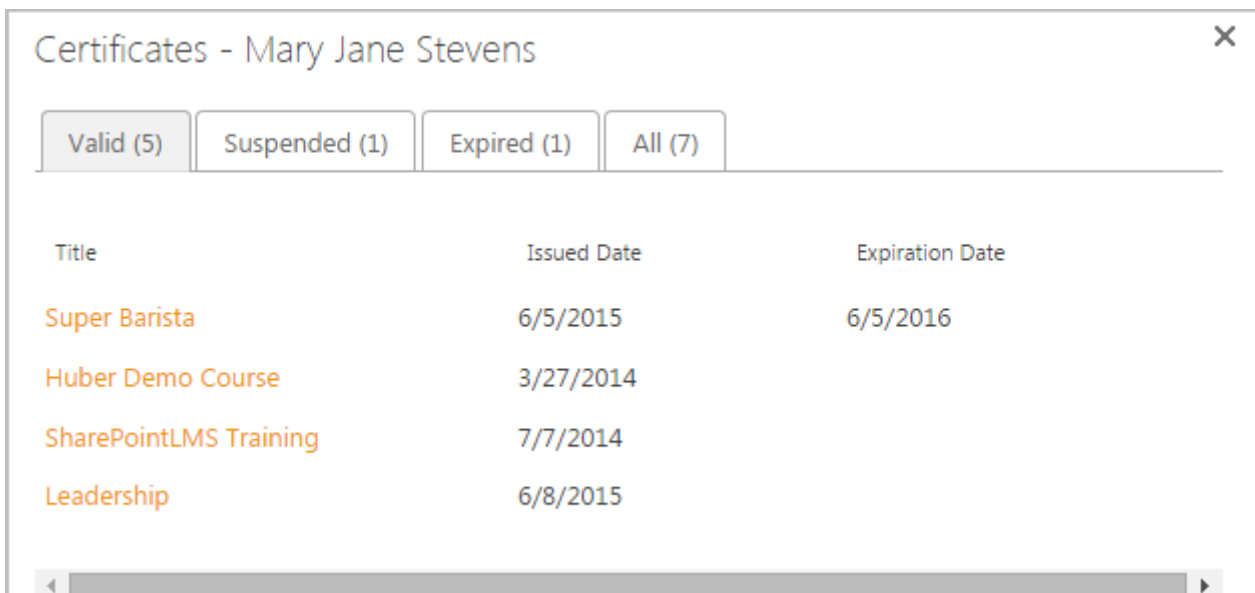


The screenshot shows the 'COMPETENCIES TOOLS' ribbon with the 'View Certificates' button highlighted. Below the ribbon, the 'People Administration' section is active, showing a search for 'Learner 2'. The main content area displays a table of certificates held by the user.

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English Language	1 2 3 4 5	3	3 (Standard)	0	3/11/2016	View Entries...	
Group1							
Communications	1 2 3 4 5	Not Present	4	Not Present	3/11/2016	View Entries...	
Living the Values	1 2 3 4 5	5	5	0	3/11/2016	View Entries...	

The form with the listed Certificates held by the employee is opened:

The User can view Certificates by clicking on the following tabs: Valid, Expired, Suspended, and All. Each Certificate will be displayed by Title, Issue Date, Expiration Date, and Status:



The screenshot shows the 'Certificates - Mary Jane Stevens' form. The 'Valid (5)' tab is selected. The table below lists the certificates:

Title	Issued Date	Expiration Date
Super Barista	6/5/2015	6/5/2016
Huber Demo Course	3/27/2014	
SharePointLMS Training	7/7/2014	
Leadership	6/8/2015	

When User clicks on the Certificate Title, the system displays the generated Certificate.

6.4 Certification Framework Management

Certification Framework is designed to ensure that employees are awarded with the Certifications relative to their skills for the indicated amount of time after which the process of recertification takes place. The Employee might be required to get certified in order to prove his competence for the required or wished proficiency Level.

The certification expiration for SharePoint CCM tracks the expiration of the Certifications issued to employees. The expiration dates are tracked by the system and a reminder prior to the expiry triggers an automatic notification email to the employee and his manager allowing for the planning of renewal of the existing Certificate or upgrading to the upper level Certification.

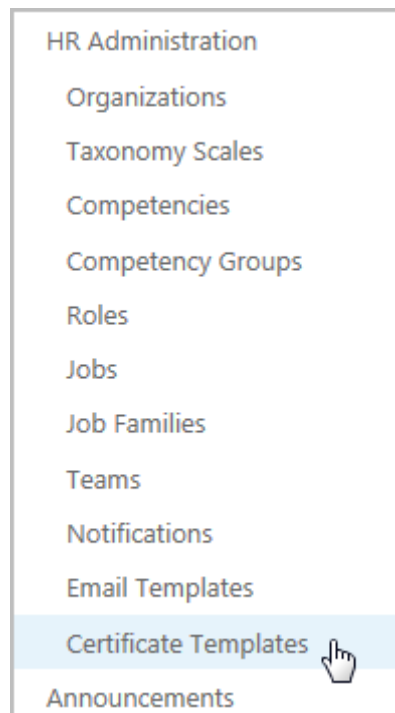
Certifications Acquisition and Certifications Expiration processes are described below in [Personal Certifications Management](#) section.

NOTE: By default Certification functionality is hidden. To use this functionality, add 'Certificate Templates' link manually to the Quick Launch menu or access it via Settings > Site Contents > Certificate Templates.

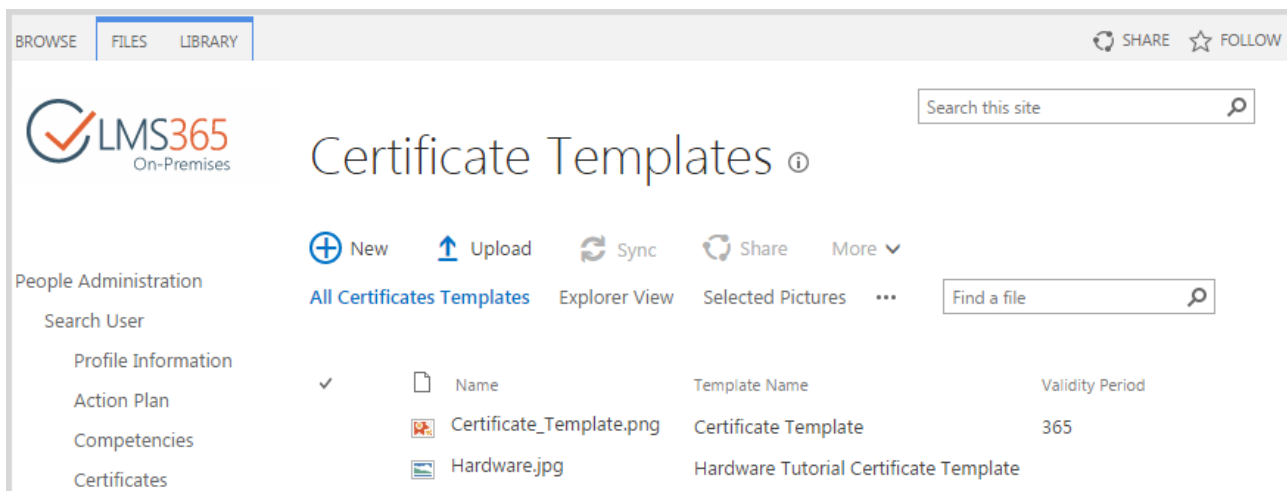
6.4.1 Certificate Template Management

The Global Administrator creates the set of Certificate Templates with full administrative control to search, modify and delete. Each Certificate Template can be connected to one SharePoint LMS course and one or more Competency Levels.

To see all the Certificate Templates, follow Certificate Templates link in HR Administration on the left side menu on the SharePoint CCM Host Home page:




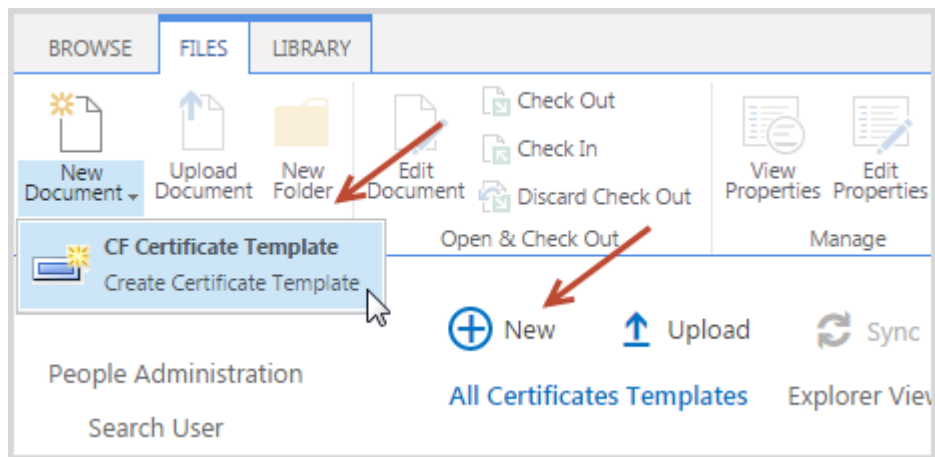
The user is redirected to the CF Certificate Templates page with all Certificate Templates displayed by Name and Validity Period:



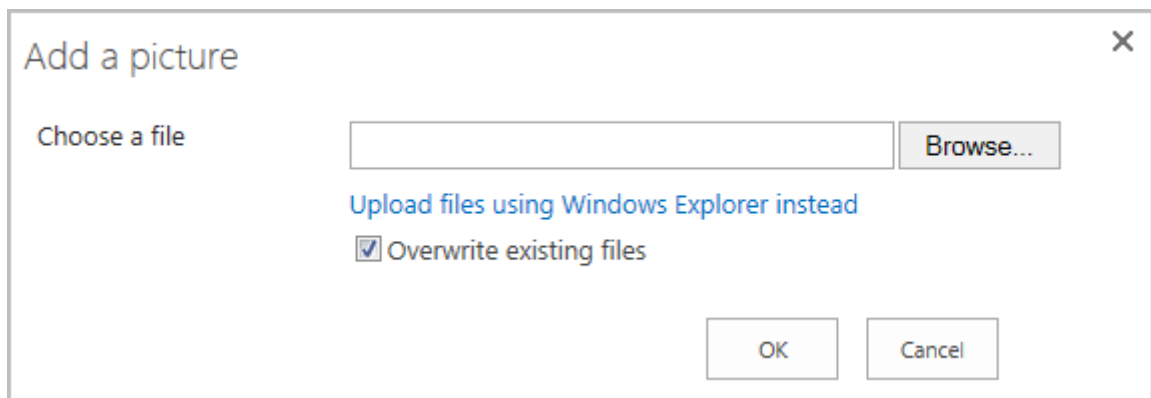
6.4.1.1 Add Certificate Template

To create new Certificate Template, follow these steps:

- 1) Click New Document button > CF Certificate Template or click New button  to open the upload form for the Certificate Template image:



2) Browse for the image for the new Certificate Template by clicking Browse button:



3) Click OK button to upload the image and open the CF Certificate Template Edit form:

Certificate Templates


EDIT

Check In Cancel Paste Cut Copy
Commit Clipboard

i The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Template Name *
Certificate Template Title

Preview *



SharePointLMS Course
Allows select course from SharePointLMS.

Competency Levels Customer Focus-Experienced (2)
[+ Add new](#)

Body *

- Template Name – type the template’s name.
- Preview section will appear showing the smaller copy of previously chosen image. Select area for certificate text display on the image.
- SharePoint LMS Course – specify the course for this certificate template.
- Competency levels – specify one or more Competency levels for this certificate template. Press Add new button to choose one.
- Body – write a short description.

Text Alignment *	<input type="radio"/> Near <input checked="" type="radio"/> Center <input type="radio"/> Far
Vertical Alignment *	<input type="radio"/> Near <input checked="" type="radio"/> Center <input type="radio"/> Far
Show Shadow	<input type="checkbox"/>
Font Family *	Andalus ▼
Font Size (px) *	20
Font Style	<input type="checkbox"/> Bold <input type="checkbox"/> Italic <input type="checkbox"/> Underline <input type="checkbox"/> Strikeout
Category	There are no categories to select, please create a new category.
Validity Period	<input type="text"/> Number of days before certificate expires
Note	<input type="text"/>

- Text Alignment – specify the text position for this certificate template.
- Vertical Alignment – specify the vertical position for this certificate template.
- Show Shadow – check the box if you want shadows to be shown.
- Font Family – specify the text font type.
- Font Size – specify the text font size.
- Font Style – check the box against the desired font style.
- Category – press the +Select Menu to specify category for this certificate template.
- Validity Period – specify the certificate template expiration date.
- Note – type any remarks here, if needed.

Notification Schedule

Granted
 Suspended
 Expired
 Days prior to expiry, separated by comma

Certificate Created Message ▼
 Stores message template sends on certificate creation

Certificate Expired Message ▼
 This message will be send when certificate expires

Certificate Suspended Message ▼

Certificate Prior Expire Message ▼

Metadata

Specify additional metadata for this template

Created at 3/15/2016 3:25 PM by ageucheva_a
 Last modified at 3/15/2016 3:25 PM by ageucheva_a

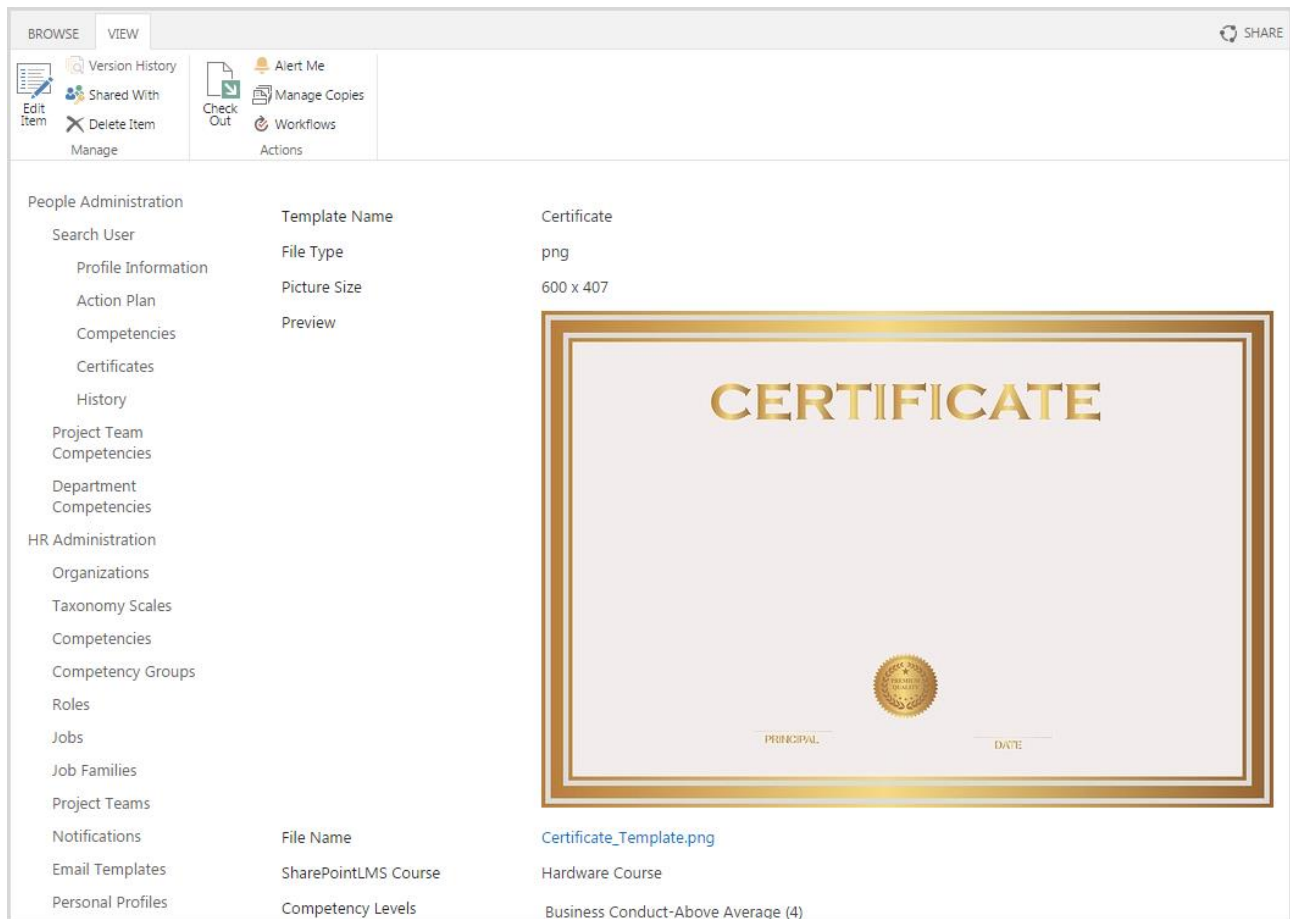
- Notification Schedule – check the box against the desired certificate template valid period. If Expired is chosen, type the number of days;
 - Certificate Created Message – specify the message template as notification about certificate creation;
 - Certificate Expired Message – specify the message template as notification about certificate expiration;
 - Certificate Suspended Message – specify the message template as notification about certificate suspension;
 - Certificate Prior Expire Message – specify the message template as notification about certificate prior expiration;
 - Metadata – type the additional metadata for this template, if needed.
- 4) Click Save button to create new Certificate Template or click Cancel button to discard the changes.

6.4.1.2 View Certificate Template's metadata

To view the Certificate Template's metadata the User should follow the steps below:

- 1) Click on the name of the Certificate template in the Certificate Templates list.

The View form will open with all metadata for the selected Certificate Template:

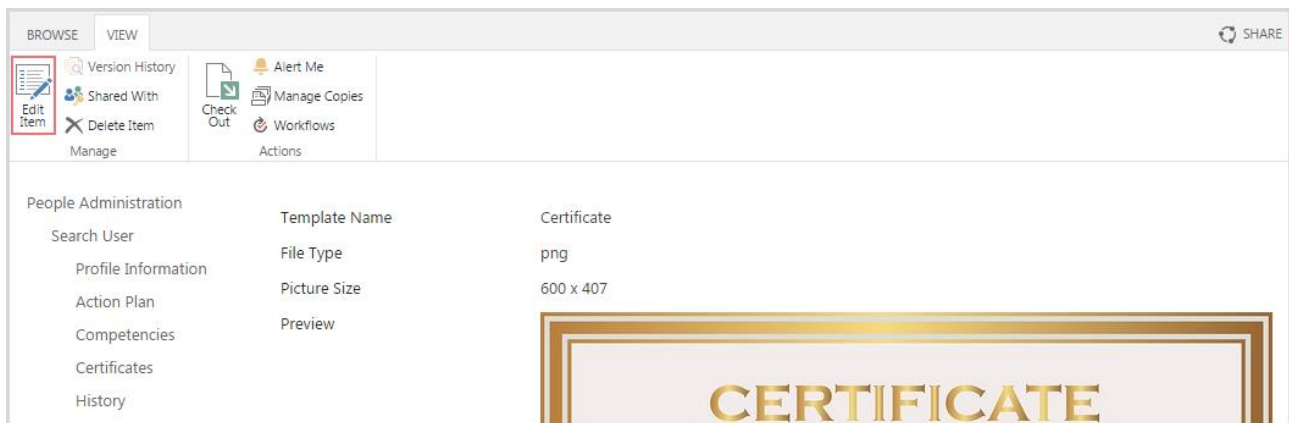


- a. Click File Name link to open the image of the Certificate Template in the new window.
 - b. Click on Certificate Message (Granted, Suspended, Prior Expire or Expired) to open the View form for the selected Certificate Message Type (see Chapter 4.10.2 [View Email Template's metadata](#) for more information).
- 2) Click Close button to return to the Certificate Templates list.

6.4.1.3 Edit Certificate Template

To edit the Certificate Template, the User follows the steps below:

- 1) Open the View form for the selected Certificate Template (see Chapter 6.4.1.2 [View certificate Template's metadata](#) for guidance).
- 2) In the View form, click Edit item button on the ribbon menu to open the Edit form for selected Certificate Template:



- 3) Make the necessary updates to the fields in the Edit form (see Chapter 6.4.1.1 [Add Certificate Template](#) to see the Edit form).
- 4) Click Save button to save the changes OR click Cancel button to discard the changes.

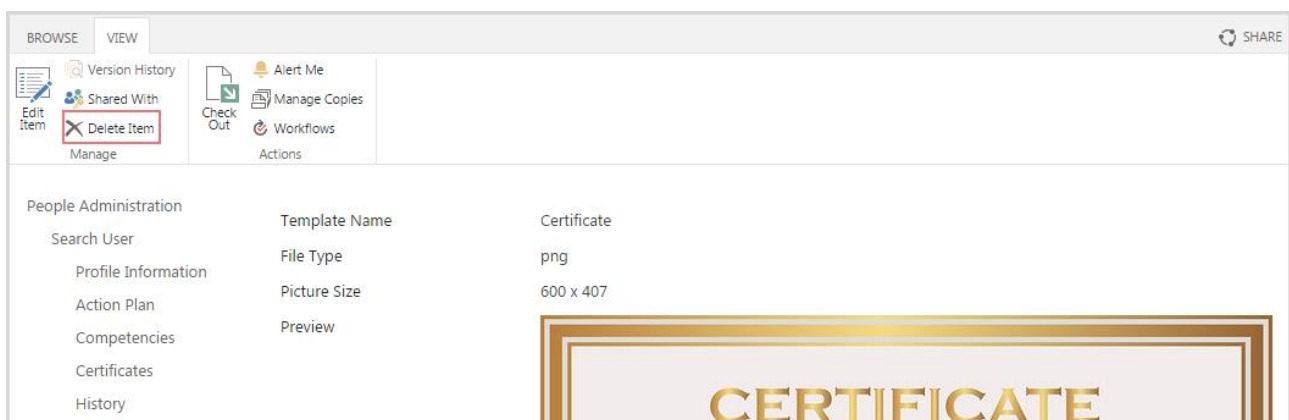
NOTE:

- Changes made to Certificate Template’s metadata, company, text area, text body and styling won’t be applied to already generated certifications.
- Changes made to period for course enrollment won’t be applied to existing enrollments.
- Changes made to validity period are reflected on existing certifications.

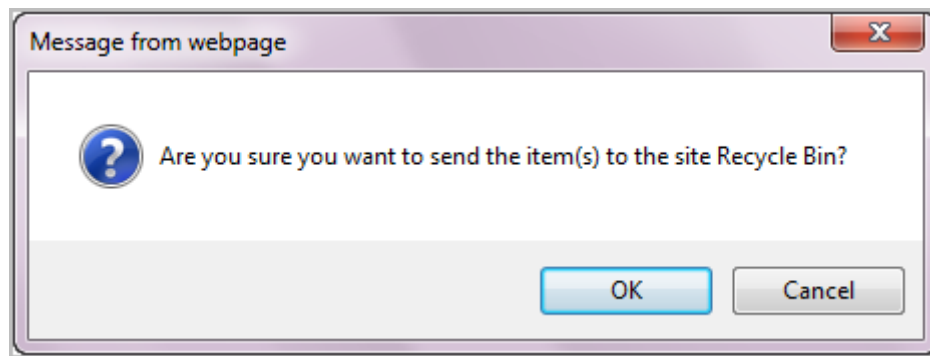
6.4.1.4 Delete Certificate Template

To remove the Certificate Template from the Certificate Templates list, follow these steps:

- 1) Open the View form for the selected Certificate Template (see Chapter 6.4.1.2 [View certificate Template’s metadata](#) for guidance).
- 2) In the View form click Delete item button on the ribbon menu:



The system will ask you to confirm the decision to remove the Certificate Template:



3) Click OK button to confirm the decision or click Cancel button to discard the process.

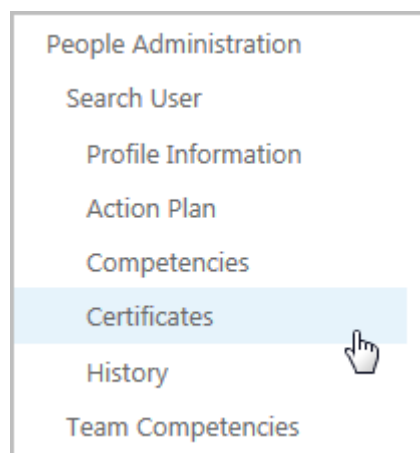
NOTE:	<ul style="list-style-type: none"> • Cannot delete the Certificate Template when it is selected for one or more Competency Levels and/or connected to any SharePoint LMS course. • Certifications generated from this Certificate Template are not deleted.
--------------	---

6.4.2 Certificates Management

In the certificates section certificates granted in CCM and in REM solutions are displayed.

The Employee certificates are stored in the Certificates list. To view the list, follow these steps:

1) Click Certificates link on the Quick Launch menu on the CF Site Home page:



The system will redirect you to the Certificates list of employees' Certificates, sorted by Title, Status, Issued Date and Expiration Date:

Search this site

Certificates

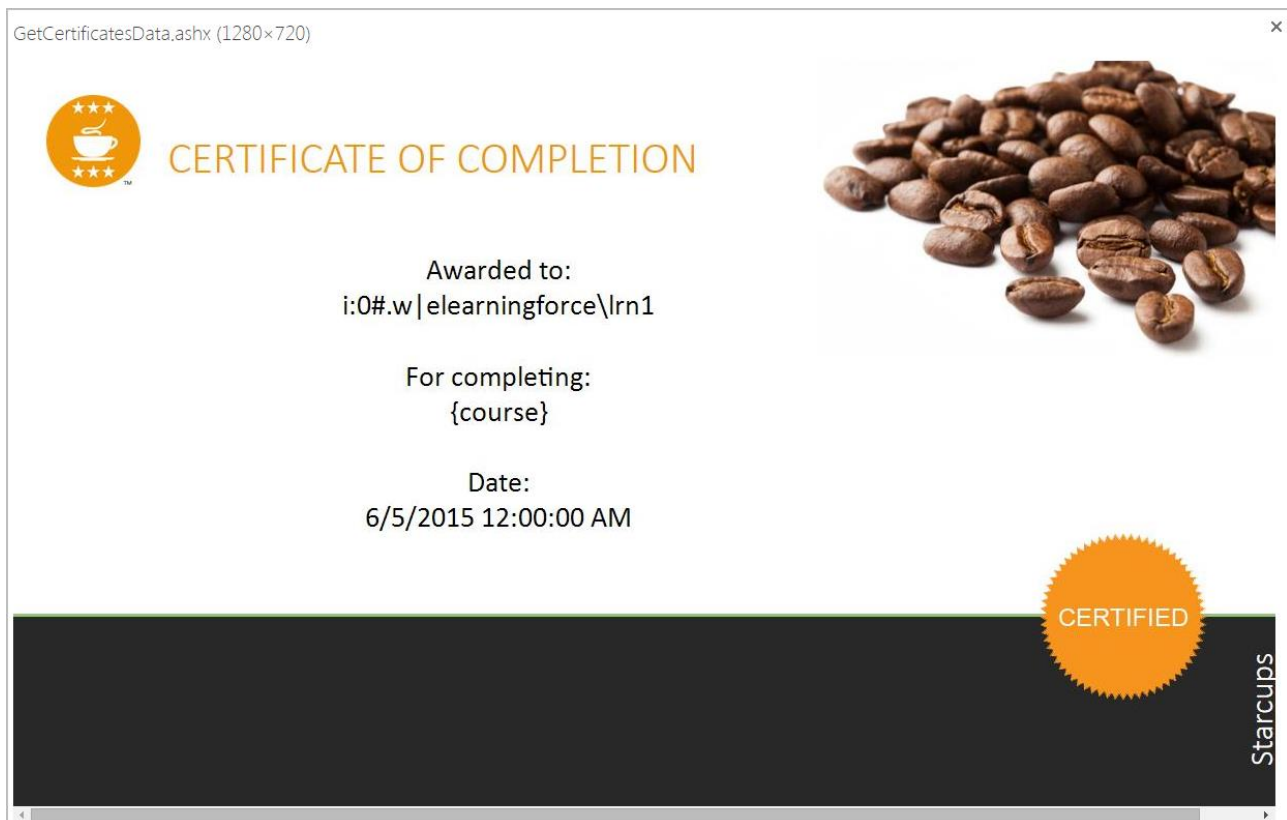
People Administration Select User

Search User

Profile Information Valid (3) | Suspended (0) | Expired (6) | All (9)

	Title	Issued Date	Expiration Date	Type	
Certificates	Starcups Barista	...	5/25/2016	Course	
History	New Super Course	...	5/25/2016	Course	
Project Team	New Curriculum	...	5/25/2016	5/25/2017	Curriculum

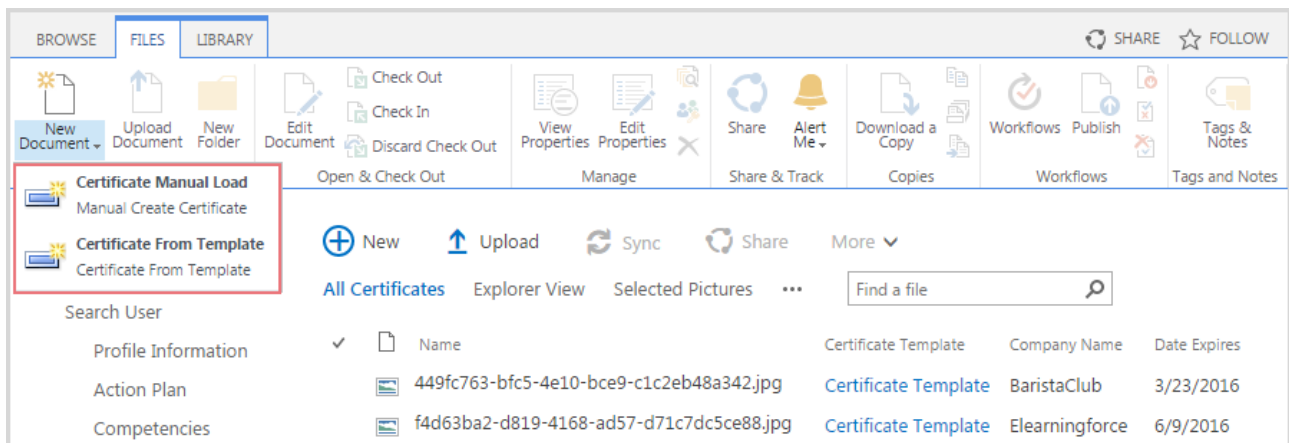
Click on the Certificate title to view it:



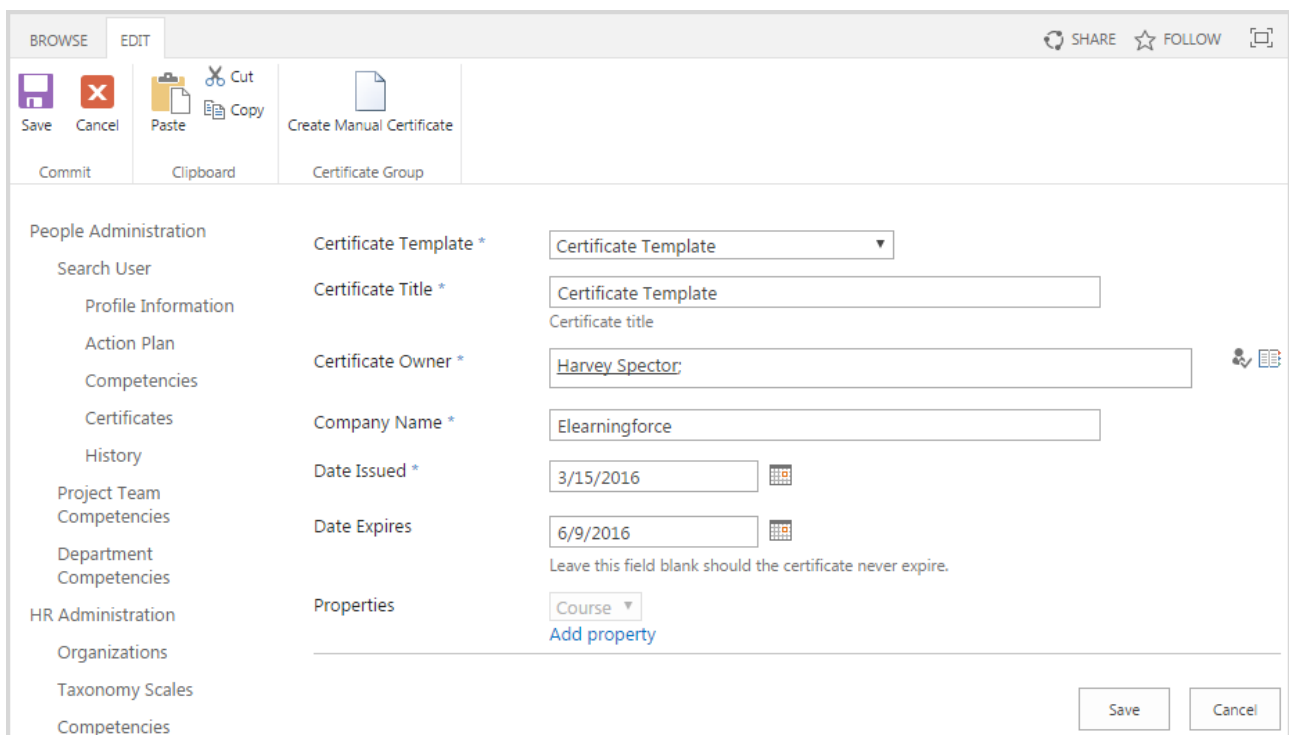
6.4.2.1 Create Certificate

To create a new Certificate for an employee, follow these steps:

- 1) First you need already created Certificate Template (to create a certificate template, see Chapter 6.4.1.1 [Add certificate Template](#)).
- 2) Go to Settings > Site Contents > Certificates and click New Document in the ribbon menu:



- Based on the selection made, the form will open that will allow either manual upload of the Certificate or the creation of the Certificate from the Certificate Template:

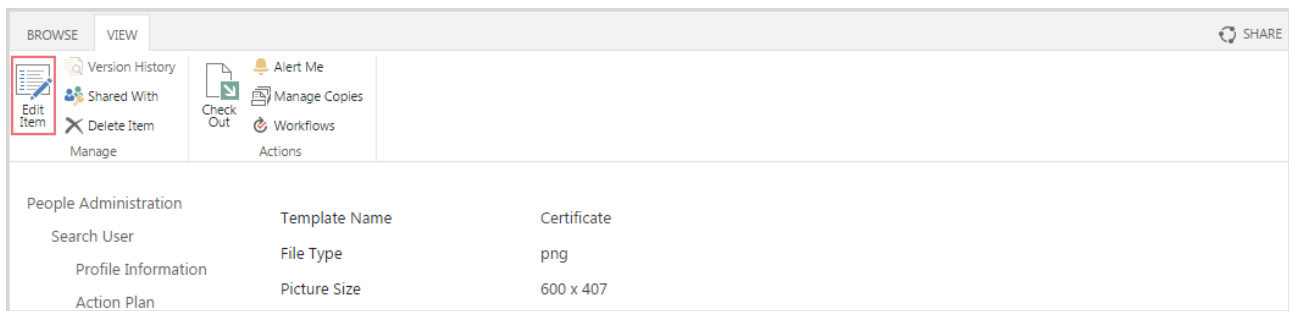


- Click Save to create new Certificate or Cancel to discard all changes.

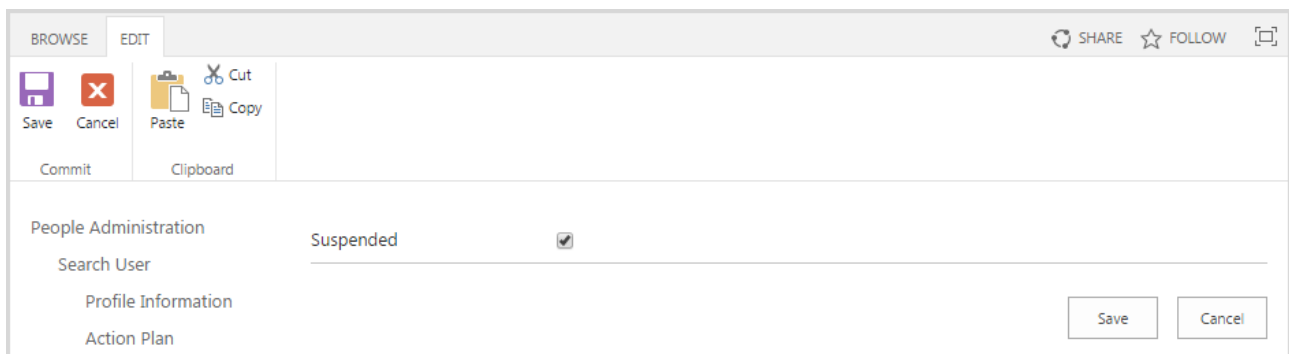
6.4.2.2 Edit Certificate

The User is able to change the Status of the Certificate to Suspended via the Edit form:

- Go to Settings > Site Contents > Certificates, select the needed certificate from the list and open it for editing:



2) Check 'Suspend Certificate' option:



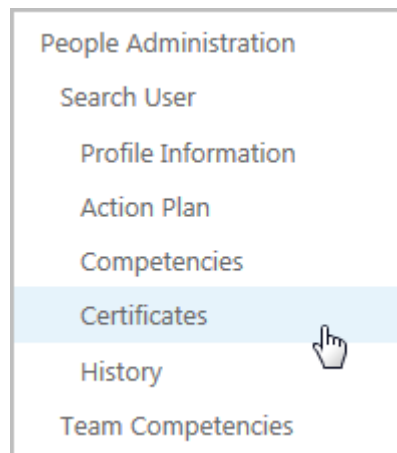
3) Click Save to save the changes or Cansel to discard changes.

6.4.3 Personal Certifications Management

The Administrator mode is for the use of People Administrators and Project Team Leaders (called Users for convenience) who manage all entities of the Person Certificates. People Administrator Project Team Leader and Managers are able to search for the Employee and the Person Certifications page with the following entities will be displayed for him: Certifications shown for all Competency levels an Employee has ever had and their statuses (Valid, Expired, and Suspended). In the certificates section certificates granted in CCM and in REM solutions are displayed.

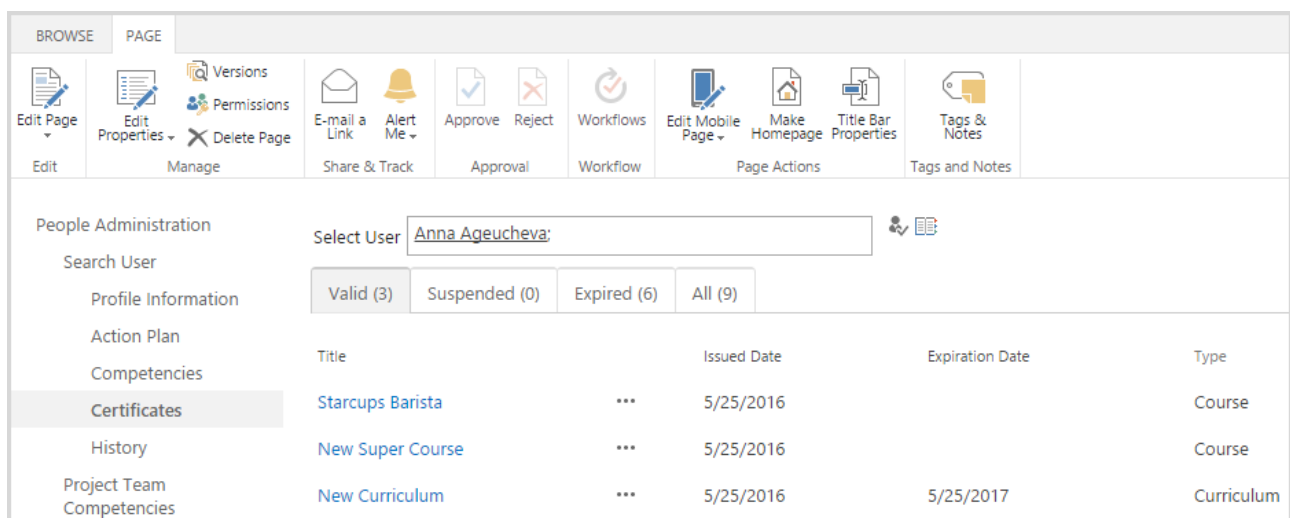
6.4.3.1 View Personal Certificates

1) Click Personal Certifications from User Tools on the left side menu on the Home page:



The system will redirect you to the Personal Certifications page where the user can find an employee whose certificates he needs to see:

- 2) Click Browse (📄) icon to pick the user name or enter the user name in the search box.
- 3) Click Check Names (👤) icon to see the Certificates for the selected user:



The screenshot shows the LMS365 interface. At the top, there are tabs for 'BROWSE' and 'PAGE'. Below these are various action icons like 'Edit Page', 'Edit Properties', 'Delete Page', 'E-mail a Link', 'Alert Me', 'Approve', 'Reject', 'Workflows', 'Edit Mobile Page', 'Make Homepage', 'Title Bar Properties', and 'Tags & Notes'. The main content area is titled 'People Administration' and features a search box with the user name 'Anna Ageucheva'. Below the search box are tabs for 'Valid (3)', 'Suspended (0)', 'Expired (6)', and 'All (9)'. The 'Valid' tab is selected, displaying a table of certificates:

Title	Issued Date	Expiration Date	Type
Starcups Barista	5/25/2016		Course
New Super Course	5/25/2016		Course
New Curriculum	5/25/2016	5/25/2017	Curriculum

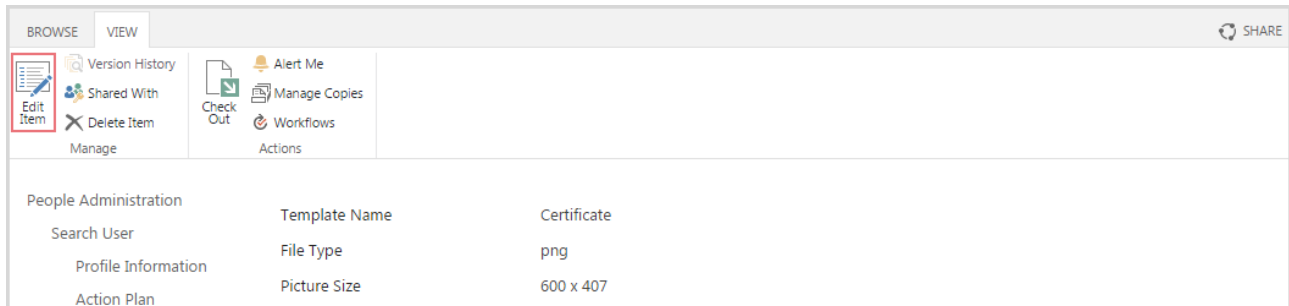
You can filter the Certificates of an employee by clicking on one of the following tabs:

- Valid – the list of Certificates that are an Employee has acquired and did not pass the Expiration date yet.
- Suspended – the list of Certificates that have been revoked.
- Expired – the list of Certificates that passed the Expiration Date
- All – the full list of Certificates of an employee is displayed.

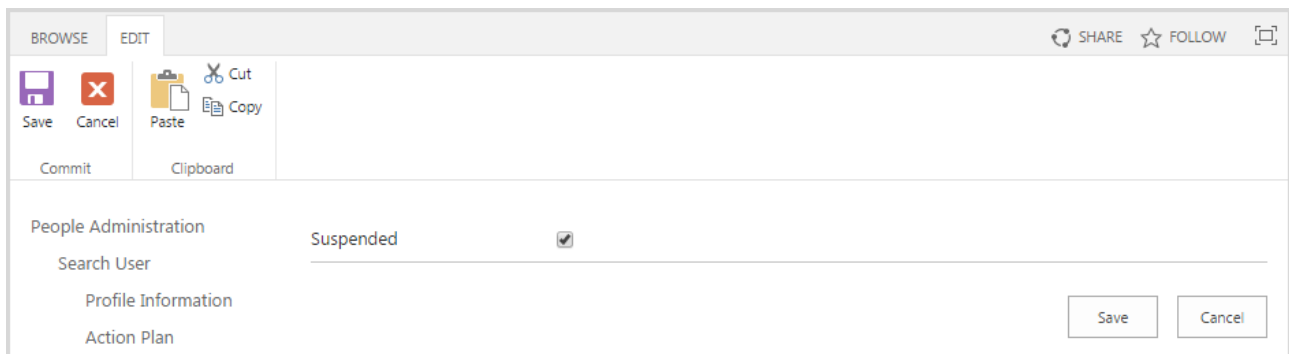
6.4.3.2 Suspend Certificate

You can suspend the Certificate of the employee:

- 1) Go to Settings > Site Contents > Certificates, select the needed certificate from the list and open it for editing:



- 2) Check 'Suspended' option:



- 3) Click Save to save the changes or Cancel to discard changes.

The Certificate Status will be changed to Suspended and the Certificate will be removed from Valid Certificates list. You can only view it in the Suspended Certificates list and in All Certificates list.

6.5 History

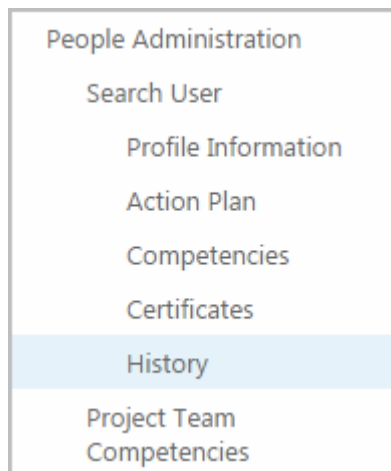
The system keeps records of the employee's history with the company, from the date of employment up to termination of employment. The following events are recorded for management to look at should it be needed:

- person's profile data changes;
- person's certifications changes;
- person's competencies changes.

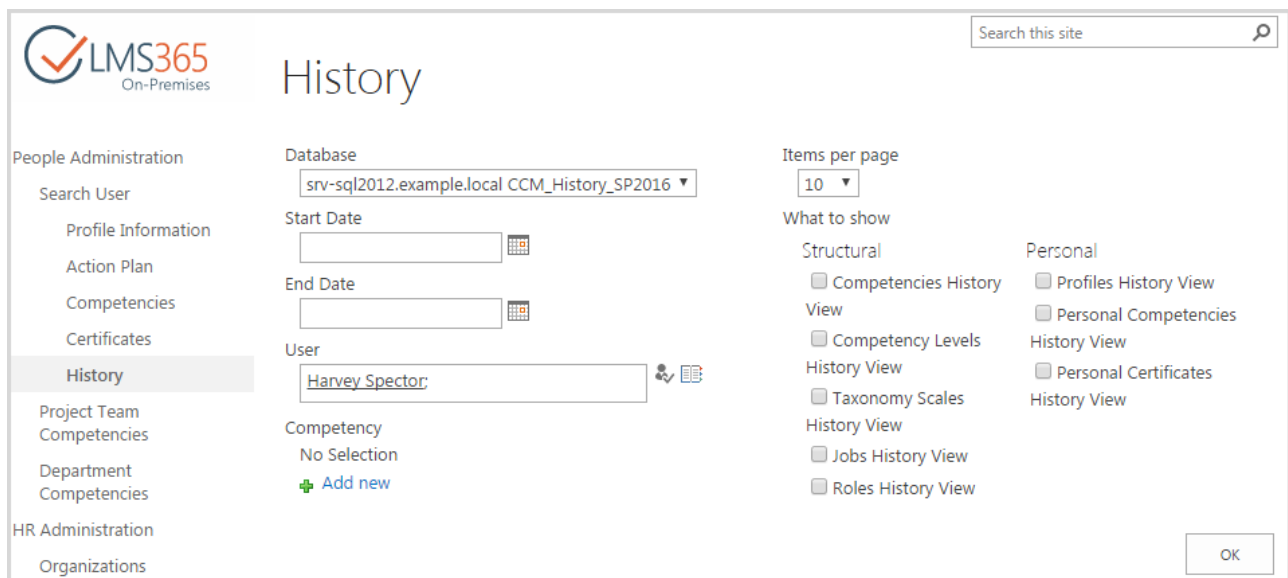
The Global Admin has the ability to change the default period during which records will be stored in the system. Upon termination of the History Login Period the system's retention mechanism

archives the records to another database. Global Admin and People Administrator are able to retrieve history logs:

- 1) From the Home page click History in People Administration on the Quick Launch menu:



- 2) You will be redirected to the View History page. This page contains the filter, that will help you to define the search criteria for people profiles and competencies:



- 3) Set criteria in the Filter.

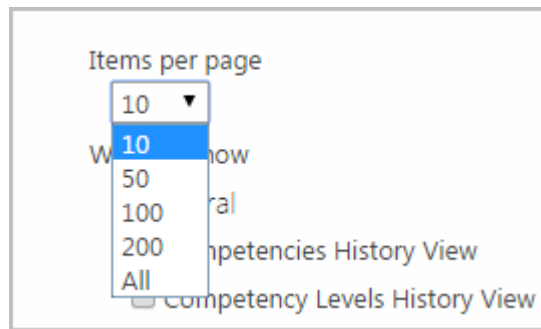
Note, that the Start Date is a required field.

If End Date field is left empty, the period till the present moment is considered.

- 4) Fill out the Profile Search and/or Competency Search sections:

- Profile Search – enter Login - Display Name or Email as the search criteria;
- Competency Search – use Competency picker to select a Competency as the search criteria;

5) Select number of items per page or set option 'All' to show all items:



6) Select Structural and Personal history views to be displayed;

7) Click OK button to view the History records based on the filter and search criteria. The information will be listed under the Competency Search section:

Display Name	Login	E-Mail	Properties	Action	Created By	Created at
Harvey Spector	i:0#.w example\2		Title Harvey Spector First Name Harvey Middle Name Last Name Spector Organization CCM Department Picture Prefix Status Profile Status Active Gender Jobs Starcups IT Support Manager Manager ageucheva_a	Updated	ageucheva_a	3/11/2016 8:16:36 AM

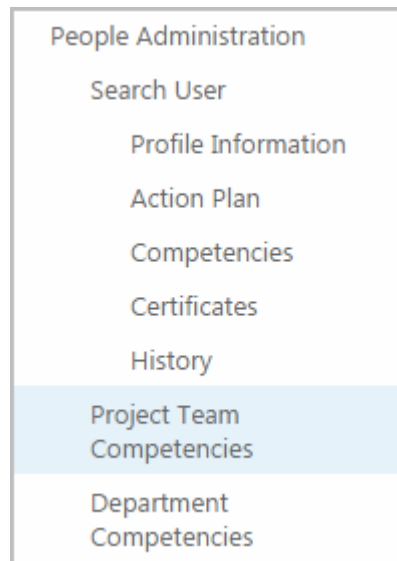
6.6 Project Team Competencies

The Project Team Competencies section offers an easy way to view Competencies of all Project Team Members and assess project teams' proficiency levels with the help of gap analysis.

6.6.1 View Project Team Competencies

To view Project Team's Competencies and assess Project Team Gap, follow these steps:

- 1) In People Administration section on the Quick Launch menu click on Project Team Competencies:



- 2) You will be redirected to Project Team Competencies page:

1 Project Team Competencies

Starcups Team

2 Held Required All

Title	Project Team Level	Required	GAP
General Employee Competencies			
English - Spoken	1 2 3 4 5	Not Present	-1
Advanced Barista Skill	1 2 3	Not Present	Not Present
Coffee-making	1 2	0	0
Company and Product Knowledge	1 2	2	-1

3 Annie Mac

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
General Employee Competencies							
English - Spoken	1 2 3 4 5	Not Present	Not Present	Not Present	7/15/2015	View Entries...	Fill GAP
Company and Product Knowledge	1 2	1	Not Present	0	7/15/2015	View Entries...	

Laura Smith

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
General Employee Competencies							
English - Spoken	1 2 3 4 5	Not Present	Not Present	Not Present	7/15/2015	View Entries...	

Mary Jane Stevens

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
General Employee Competencies							
English - Spoken	1 2 3 4 5	Not Present	3	Not Present	6/5/2015	View Entries...	Fill GAP
Coffee-making	1 2	1	Not Present	0	6/5/2015	View Entries...	
Advanced Barista Skill	1 2 3 4 5	Not Present	Not Present	Not Present	6/5/2015	View Entries...	
Company and Product Knowledge	1 2	2	Not Present	-1	6/5/2015	View Entries...	Fill GAP

- 1) Choose the Project Team from the drop-down (Box#1 on the screen above):
- 2) The Project Team Competencies of the selected Project Team are displayed (Box#2 on the screen above):
 - o Held – the list of Competencies that are currently held by at least one Project Team Member;
 - o Required – the list of Competencies that is required for at least one Project Team Member;
 - o All – the list of all (Held and Required) Project Teams Competencies;

NOTE: Project Team Level is the Project Team Competency's Level that is calculated as an average of User Levels of all Project Team Members for the Competency.

Required is the Required Level for the Project Team Competency that is the highest Required Level for this Competency from the Personal Competencies of Project Team Members.

GAP is calculated as the difference between the Required and Project Team Level value.

In the case on the screen above it is calculated for 'English – Spoken' competency as follows:

1. Project Team level value is calculated:

Annie Mac –User Level 2;

Laura Smith – User Level 3;

Mary Jane Stevens – User Level 1;

The total number of points is divided by the number of project team members:

$$6/3 = 2$$

2. The Gap is calculated:

The Required level is abstracted from the Project Team level value: $2 - 3 = -1$

On the screen above GAP for 'English – Spoken' competency is '-1'.

- 3) The list of all Project Team Members is displayed under the Project Team's Competencies. The User can click on the arrow to the right of the user name of the Project Team Member to see the Personal Competencies of the selected employee (Box#3 in the screen above). Please, refer to the [section View Employee's Personal Competencies](#) on the details about the Personal Competencies Gap for an employee.

The User can mark who out of the Team Members has the Team Competency by selecting the Team Competency in the Team Competencies list:

The system colors the user names of the Team Members in the following way:

- Red – if the Team Member does not possess the selected Team Competency;
- Yellow – if the Team Member does have the selected Team Competency but the Competency Level is lower than the Required Level for the Team Competency;
- Green - if the Team Member does have the selected Team Competency and the Competency Level is the same or higher than the Required Level for the Team Competency;

Project Team Competencies

Starcups Team

Held Required All

Title	Project Team Level	Required	GAP
General Employee Competencies			
English - Spoken	1 2 3 4 5	3	-1
Coffee-making	1 2	1	0
Advanced Barista Skill	1 2 3 4 5	Not Present	Not Present
Company and Product Knowledge	1 2	2	-1
Annie Mac			
Laura Smith			
Mary Jane Stevens			

6.6.2 Fill Project Team Gap

To close the Project Team Gap, the User has two options:

- 1) One by one fill gaps of Project Team Members that hold the selected Competency;
- 2) Grant the Competency to the Project Team Member(s) that do not currently hold it.

6.6.2.1 Fill Gap of Project Team Member

To fill Project Team Gap by closing the Project Team Members' Gaps, follow these steps:

- 1) Click on the Project Team Competency to select it from the list. The Project Team Member user names will paint according to the rules, described in Chapter 6.6.1 [View Project Team Competencies](#);
- 2) Click on the Project Team Member user name that is painted yellow;
- 3) Choose the Competency from the Competency Project Team Member's list and use Fill Gap link to grant competency manually or enroll employee into a course.

6.6.2.2 Grant Competency for Project Team Member

To fill Project Team Gap by granting a Competency to the Project Team Member that does not currently holds it, the User should follow the steps below:

- 1) Click on the Project Team Member's user name painted red to select him from the list;
- 2) The Project Team Member's user names will paint according to the rules described in [View Project Team Competencies](#) section;
- 3) Click Grant Competency on the ribbon in the Competencies Tools. Refer to the [section Grant Competency](#) for details on how to grant new Competency to an individual employee.

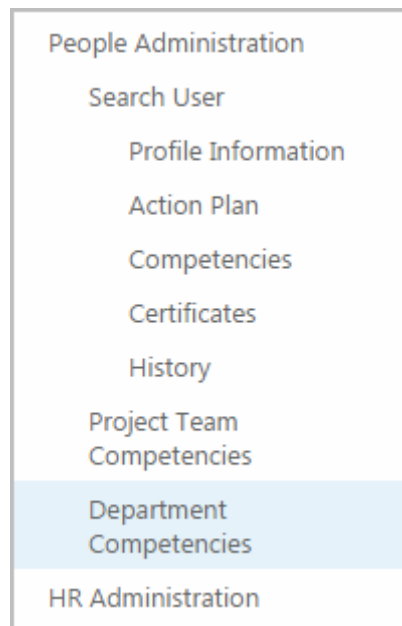
6.7 Department Competencies

Department Competencies section offers an easy way to view Competencies of all department employees and assess department members' proficiency levels with the help of gap analysis. Information about Departments is taken from users' Personal Profiles:

Organization	CCM
<u>Department</u>	Sales

To view Department Competencies and assess Department Competency Gap, follow these steps:

- 1) In People Administration section on the Quick Launch menu click on Department Competencies:



- 2) You will be redirected to Department Competencies page:

Department Competencies

Action

Held Required All

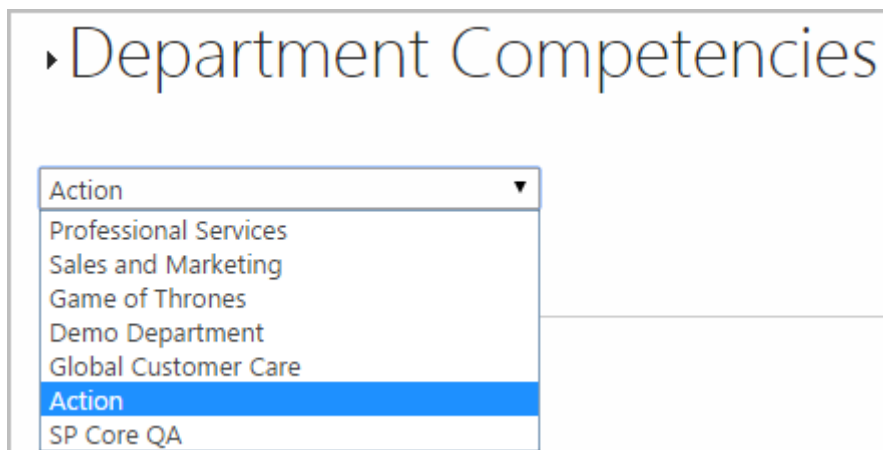
Title	Department Level	Required	GAP
Ungrouped			
Company and Product Knowledge	2	2	-1
English - Spoken	1 2 3 4 5	3	-1
Communication	2 3	Not Present	Not Present
Coffee-making	2	1	0
Customer Focus	2	1	0

Laura Smith

Mary Jane Stevens

Annie Mac

3) Choose the Department from the drop-down:



- 4) The Department Competencies are displayed in three tabs:
- Held – the list of Competencies that are currently held by at least one Department Member;
 - Required – the list of Competencies that is required for at least one Department Member;
 - All – the list of all (Held and Required) Department Competencies:

Department Competencies

Action				
Held	Required	All		
Title	Department Level	Required	GAP	
Ungrouped				
Company and Product Knowledge	2	2	-1	
English - Spoken	2.345	3	-1	
Communication	23	Not Present	Not Present	
Coffee-making	2	1	0	
Customer Focus	2	1	0	

NOTE: Department Level is the Department Competency's Level that is calculated as an average of User Levels of all Department Members for the Competency.

Required is the Required Level for the Department Competency that is the highest Required Level for this Competency from the Personal Competencies of Department Members

GAP is calculated as the difference between the Required and Deratment Level value.

In the case on the screen above it is calculated for 'English – Spoken' competency as follows:

1. Deratment level value is calculated:

Annie Mac –User Level 2;

Laura Smith – User Level 3;

Mary Jane Stevens – User Level 1;

The total number of points is divided by the number of department members: $6/3 = 2$

2. The Gap is calculated:

The Required level is abstracted from the Deratment level value: $2 - 3 = -1$

On the screen above GAP for 'English – Spoken' competency is '-1'.

- 5) The list of all Department Members is displayed under the Department Competencies. The User can click on the arrow to the right of the user name of the Deratment Member to see the Personal Competencies of the selected employee. Please, refer to the [section View Employee's Personal Competencies](#) on the details about the Personal Competencies Gap for an employee:

Department Competencies

Action							
Held	Required	All					
Title	Department Level	Required	GAP				
Ungrouped							
Company and Product Knowledge	2	2	-1				
English - Spoken	3 4 5	3	-1				
Communication	2 3	Not Present	Not Present				
Coffee-making	2	1	0				
Customer Focus	2	1	0				
Laura Smith ▲							
Held	Required	Suggested	All				
Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
General Employee Competencies							
English - Spoken	3 4 5	3	Not Present	0	7/15/2015	View Entries...	
Coffee-making	2	1	Not Present	0	7/15/2015	View Entries...	
Mary Jane Stevens ▲							
Held	Required	Suggested	All				
Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
General Employee Competencies							
English - Spoken	3 4 5	3	3	-2	6/5/2015	View Entries...	Fill GAP
Coffee-making	2	1	Not Present	0	6/5/2015	View Entries...	
Company and Product Knowledge	2	2	Not Present	0	6/5/2015	View Entries...	

The User can mark who out of the Department members has the Department Competency by selecting the Department Competency in the Department Competencies list:

The system colors the user names of the Department Members in the following way:

- Red – if the Department Member does not possess the selected Department Competency;
- Yellow – if the Department Member does have the selected Department Competency but the Competency Level is lower than the Required Level for the Department Competency;
- Green - if the Department Member does have the selected Department Competency and the Competency Level is the same or higher than the Required Level for the Department Competency:

Department Competencies

Action

Held Required All

Title	Department Level	Required	GAP
Ungrouped			
Company and Product Knowledge	2	2	-1
English - Spoken	1 2 3 4 5	3	-1
Communication	2 3	Not Present	Not Present
Coffee-making	2	1	0
Customer Focus	2	1	0
Laura Smith			
Mary Jane Stevens			
Annie Mac			

6.7.1 Fill Department Competency Gap

To close the Department Competency Gap, the User has two options:

- 1) One by one fill gaps of Department Members that hold the selected Competency;
- 2) Grant the Competency to the Department Member(s) that do not currently hold it.

To fill Department Competency Gap by closing the Department Members' Gaps), follow these steps:

- 1) Click on the Department Competency to select it from the list. The Department Member user names will be coloured according to the rules, described in Chapter 6.7 [Department Competencies](#);
- 2) Click on the Department Member user name that is pained yellow;
- 3) Choose the Competency from the Competency Department Member's list and use Fill Gap link to grant competency manually or enroll employee into a course.

To fill Department Competency Gap by granting a Competency to the Department Member that does not currently holds it, follow the steps below:

- 1) Click on the Department Member's user name pained red to select him from the list;
- 2) The Department Member's user names will be coloured according to the rules described in Chapter 6.7 [Department Competencies](#);
- 3) Click Grant Competency on the ribbon in the Competencies Tools. Refer to the [section Grant Competency](#) for details on how to grant new Competency to an individual employee.

7 ANNOUNCEMENTS

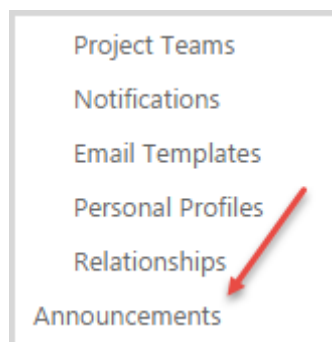
The Announcements are intended for information purposes. This section allows users to create announcements for target participants (such as Employees, Managers, and Project Teams) to share important message with them.

Global Administrator has the ability to create Global Announcements for all Organizations within SharePoint CCM. Other actors will have the permission to only view the Global Announcements from the SharePoint CCM Home page.

People Administrator has the ability to create Announcements within his Organization. Project Team Leader has the ability to create Announcements for his project team.

Announcement functionality is carried from OOTB SharePoint LMS system. The only exception is that announcements will be created for target Users/Groups, not SharePoint LMS Courses.

The Announcements are stored in the list and can be accessed by clicking Announcements from the left side menu on the Home page (SharePoint CCM Host, organization Home and project team Home pages respectively):



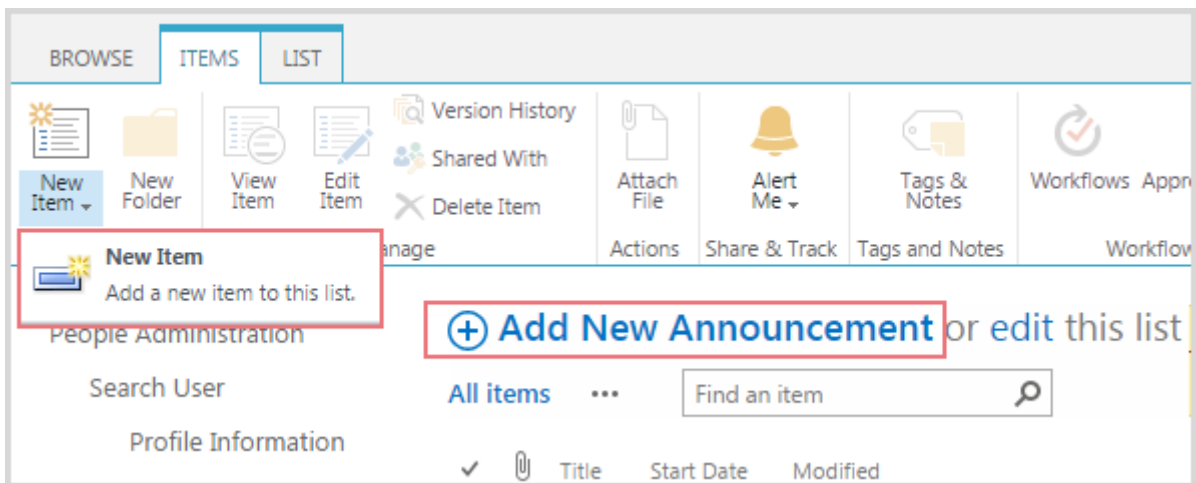
7.1 Add Announcement

To add a new Announcement to the Announcement list, follow these steps:

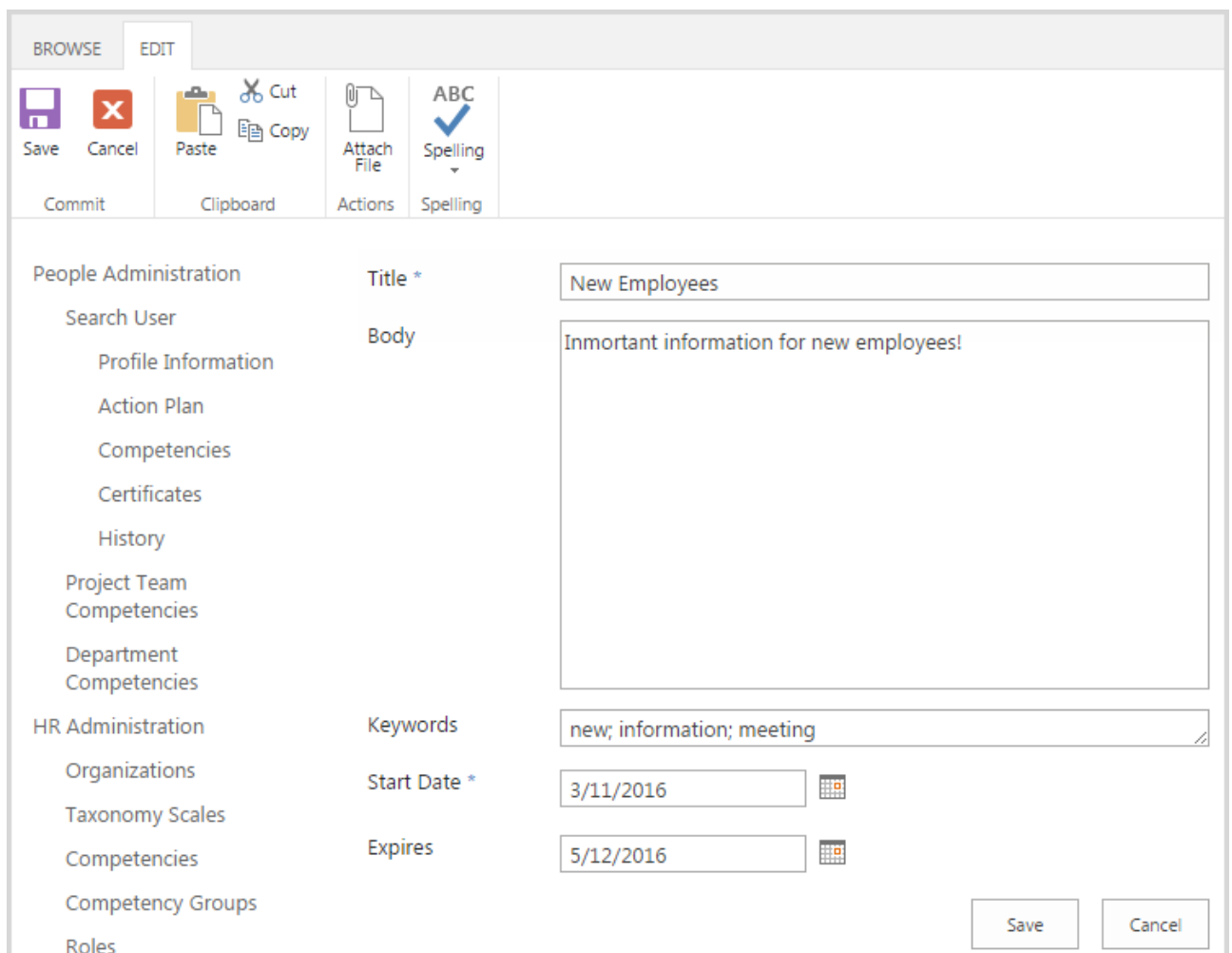
- 1) Click Add New Announcement button ;

OR

- 2) From the ribbon menu Items choose New Item:



3) Fill out the Announcements – New Item form:



- Title – enter the subject of the new Announcement;
- Body – enter the text of the Announcement;
- Keywords – enter the keywords on which the new Announcement will be searchable;

- Start Date – enter the date on which the Announcement is to be displayed for the viewing;
- Expires – enter the date on which the Announcement will expire.

4) Click Save button to create new Announcement or click Cancel button to discard the changes.

You will be redirected to the Announcements list.

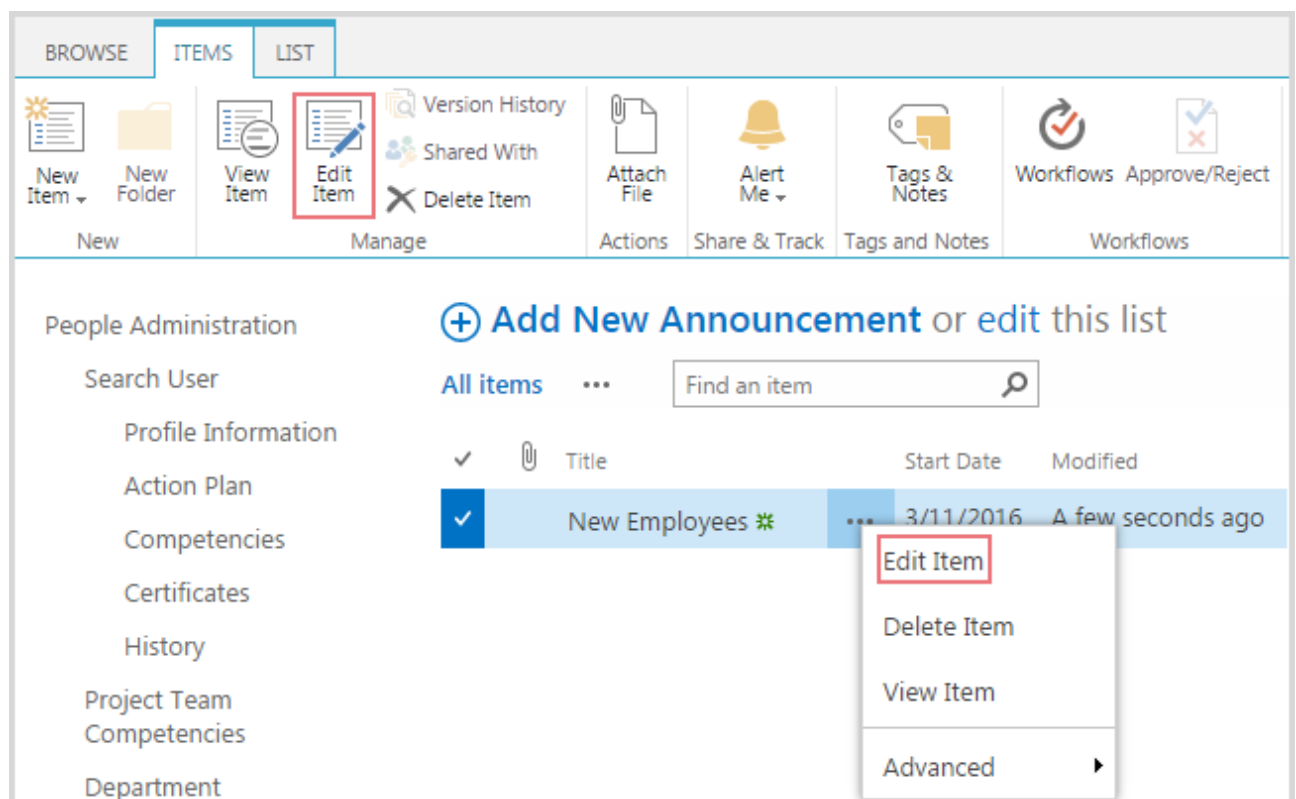
7.2 Edit Announcement

To edit the Announcement, follow these steps:

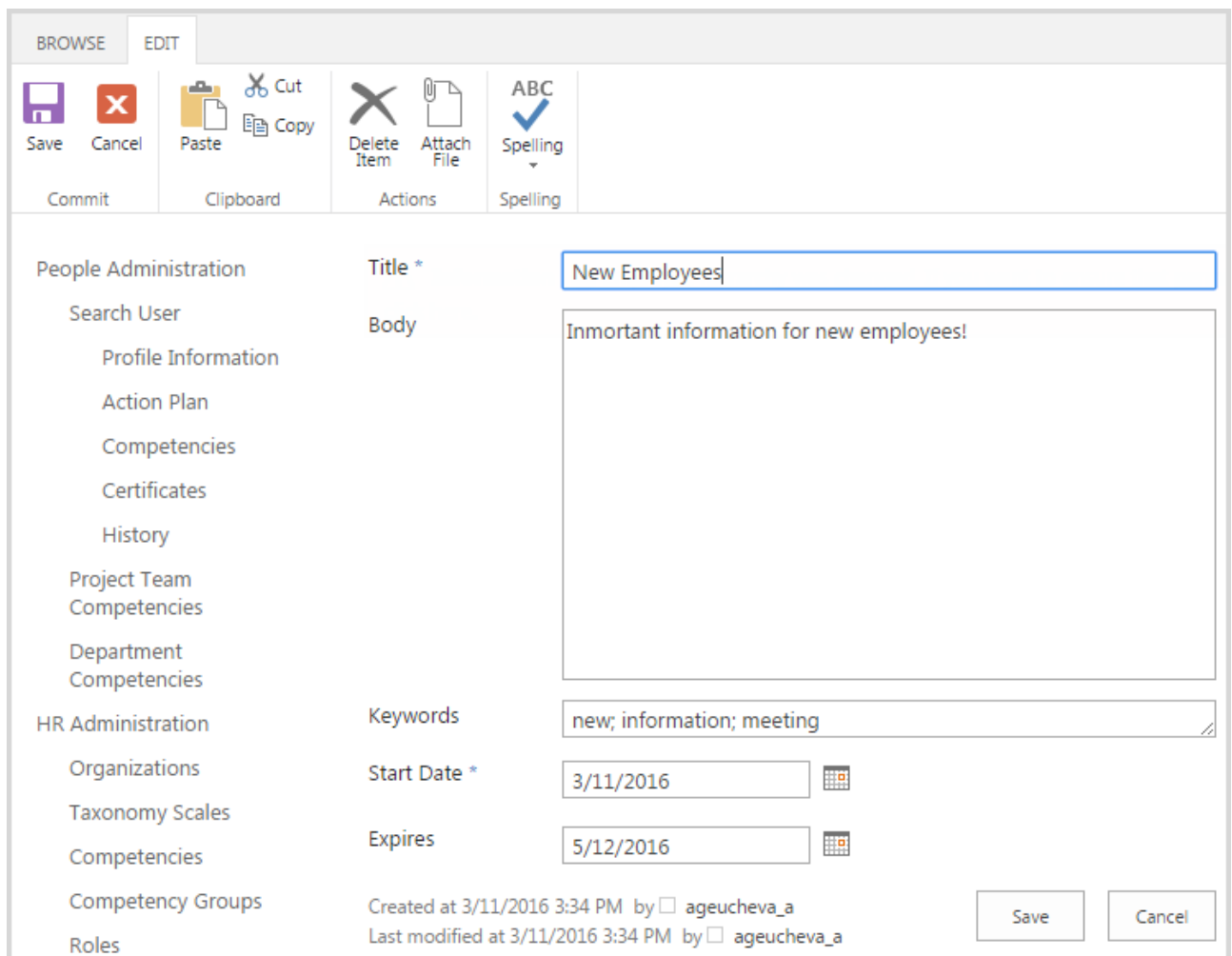
1) Click Edit Item from the drop-down list next to the Announcement’s Title;

OR

2) From the ribbon click Edit Item in Items ribbon menu after selecting the Announcement in the list:



- 3) Make the necessary changes to the Announcement metadata fields in the Announcements-Edit form:



- 4) Click Save button to save the changes made or click Cancel button to discard the changes. You will be redirected to the Announcements list.

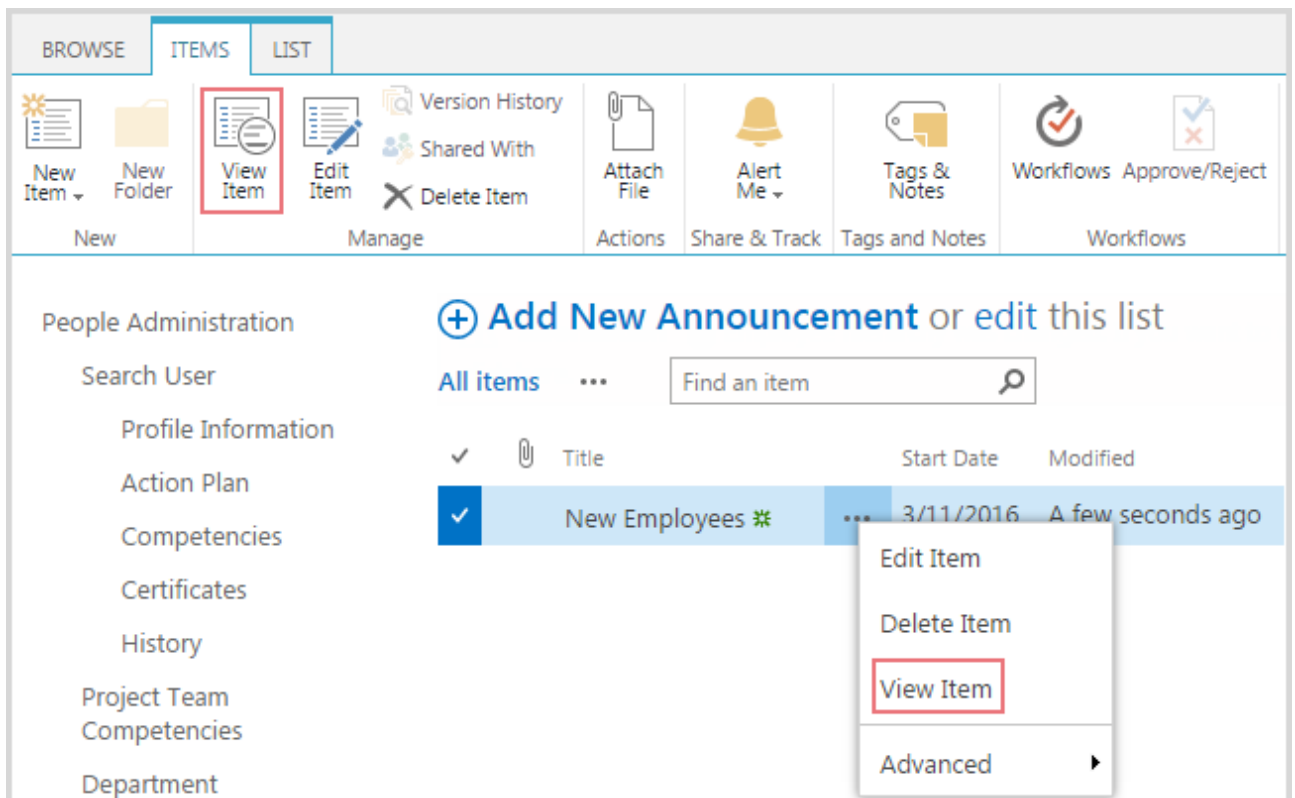
7.3 View Announcement

The Announcement becomes visible once the Start Date comes. To view the Announcement, follow the steps below:

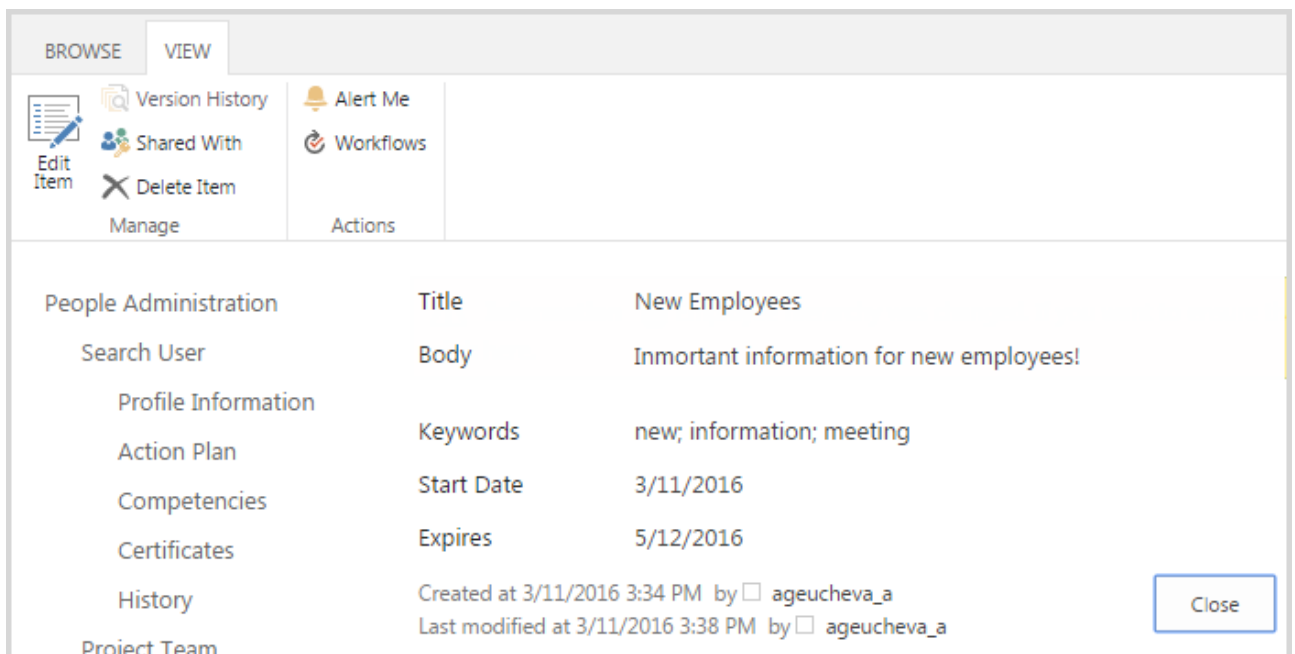
- 1) Click View Item from the drop-down list next to the Announcement Title;

OR

- 2) From the ribbon menu Items click View Item:



- 3) The View form will open with the detailed information for the selected Announcement (Title, Body, Start date, Expires):



- 4) Click Close button to return to the Announcements list.

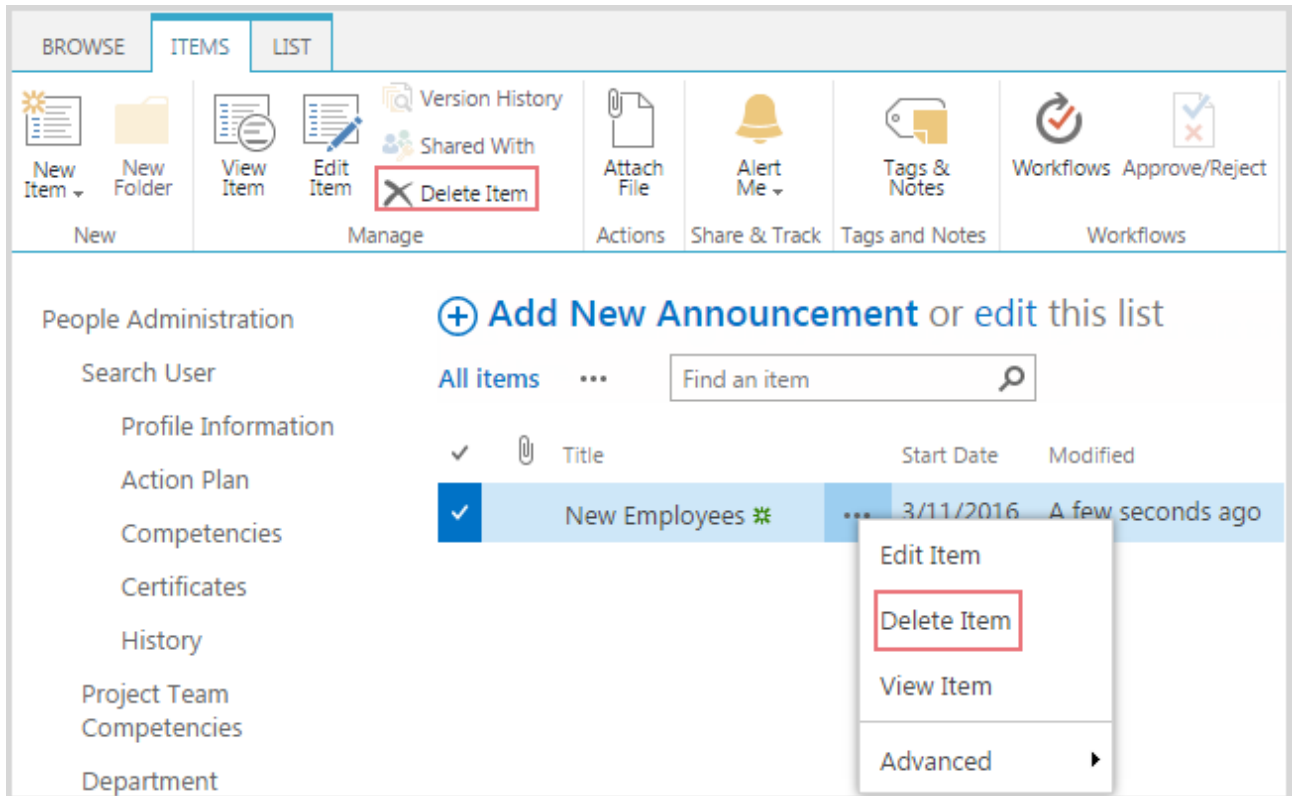
7.4 Delete Announcement

To delete the Announcement, follow these steps:

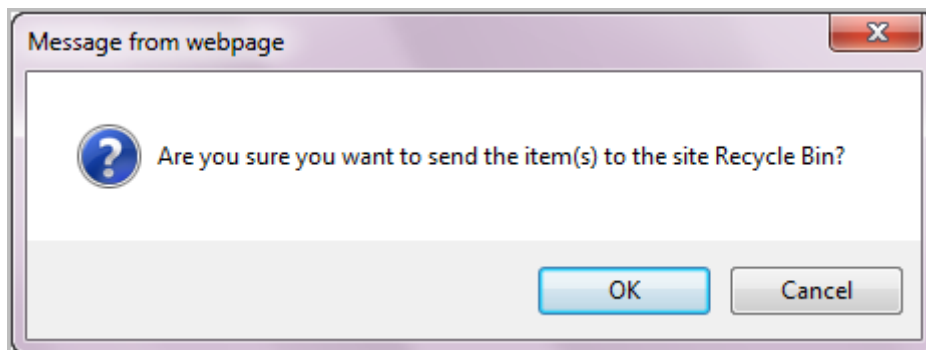
- 1) Click Delete Item from the drop-down list next to the Announcement's Title;

OR

- 2) From the ribbon menu Items choose Delete Item:



- 3) The system will ask you to confirm the decision to permanently remove the selected Announcement:

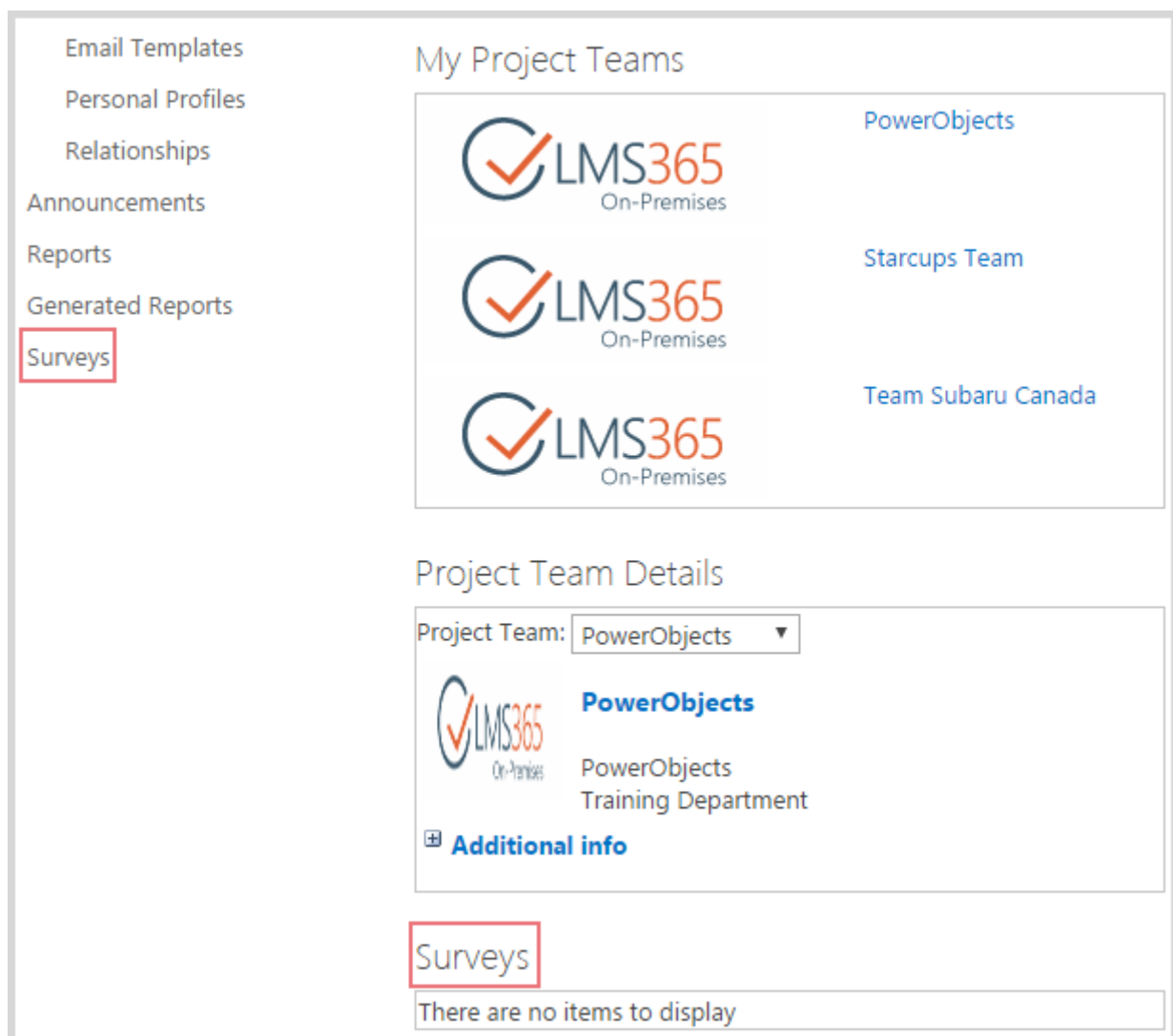


- 4) Click OK button to confirm the decision OR Cancel button to discard the changes.

You will be redirected to the Announcements list, where the removed Announcement is no longer displayed.

8 SURVEYS

SharePoint CCM Surveys allow accumulating the information about the general SharePoint CCM users. By default, the Survey link can be found on the main host page both on the left side menu and in the main page field as a separate web part:

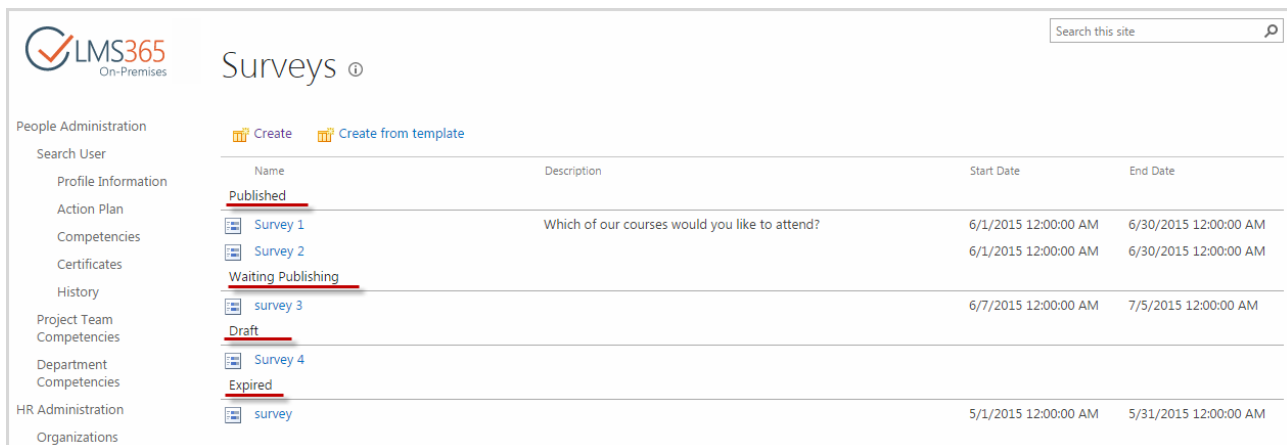


The screenshot displays the SharePoint CCM interface. On the left, a navigation menu lists various options: Email Templates, Personal Profiles, Relationships, Announcements, Reports, Generated Reports, and **Surveys** (highlighted with a red box). The main content area is divided into two sections. The top section, titled 'My Project Teams', lists three teams: PowerObjects, Starcups Team, and Team Subaru Canada, each with the LMS365 On-Premises logo. The bottom section, titled 'Project Team Details', shows a dropdown menu for 'Project Team' set to 'PowerObjects'. Below this, the details for the 'PowerObjects' team are shown, including the LMS365 logo, the team name, and the department 'PowerObjects Training Department'. An 'Additional info' link is also visible. At the bottom of the 'Project Team Details' section, the 'Surveys' link is highlighted with a red box, and a message below it states 'There are no items to display'.

Under the Survey link, the User can find the full list of the links to each SharePoint CCM Survey. If you want to see the detailed link, click the Survey link on the left side menu OR in the main page field. Once you have done it, you will see the detailed Surveys list consisting of the following sections:

- Published Surveys;

- Waiting Publishing;
- Draft;
- Expired:



Name	Description	Start Date	End Date
Published			
Survey 1	Which of our courses would you like to attend?	6/1/2015 12:00:00 AM	6/30/2015 12:00:00 AM
Survey 2		6/1/2015 12:00:00 AM	6/30/2015 12:00:00 AM
Waiting Publishing			
survey 3		6/7/2015 12:00:00 AM	7/5/2015 12:00:00 AM
Draft			
Survey 4			
Expired			
survey		5/1/2015 12:00:00 AM	5/31/2015 12:00:00 AM

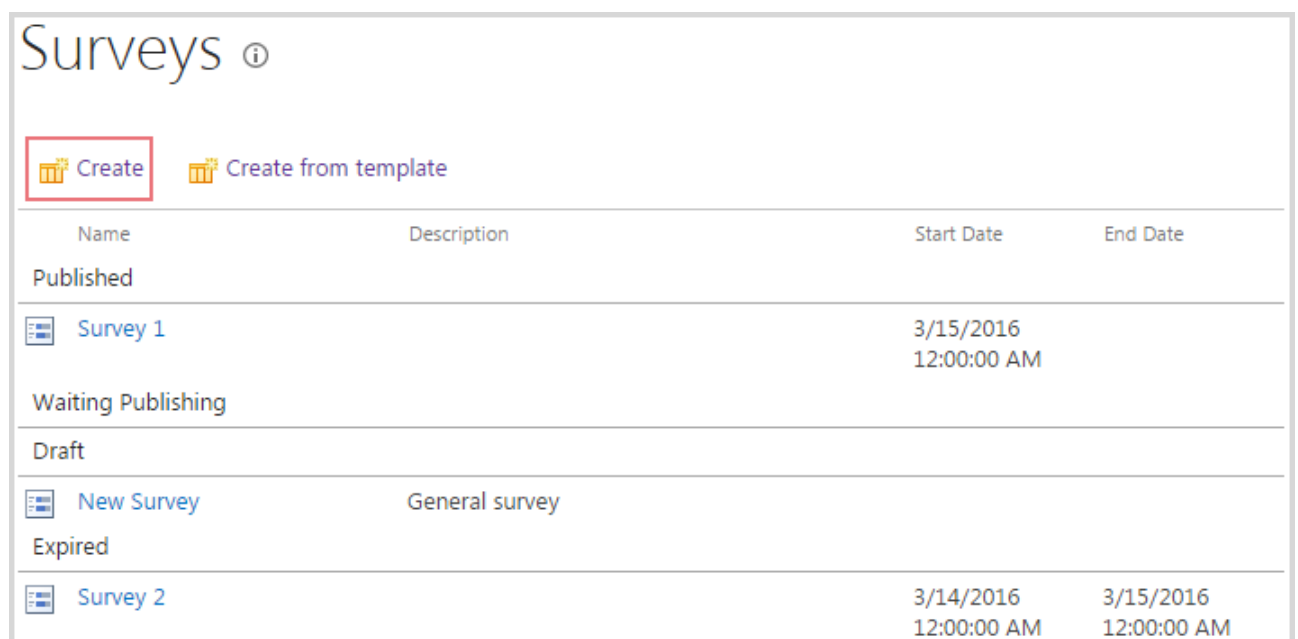
8.1 Create Survey

The User can create both standard and template-based SharePoint CCM surveys.

8.1.1 Create Standard Survey

To create a standard SharePoint CCM survey, do the following:

- 1) On the left side menu click Surveys;
- 2) Once you have done it, the following page will appear:



Name	Description	Start Date	End Date
Published			
Survey 1		3/15/2016 12:00:00 AM	
Waiting Publishing			
Draft			
New Survey	General survey		
Expired			
Survey 2		3/14/2016 12:00:00 AM	3/15/2016 12:00:00 AM

- 3) Click Create;

4) The following form will appear:

Site Contents ▸ New

Name and Description
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this survey.

Name:

Description:

Survey Options
Specify whether users' names will appear in survey results and whether users can respond to the same survey multiple times.

Show user names in survey results?
 Yes No

Allow multiple responses?
 Yes No

- Name – enter the name for the survey;
 - Description – enter the description for the survey;
 - Show User names in survey results? – select *Yes* to display user names in survey results; select *No* to make a survey anonymous;
 - Allow Multiple Responses? – select *Yes* to allow users to take the survey more than ones.
- 5) Click Next to specify the Survey details OR click Cancel to omit the survey creation;

6) Complete the open form to add the survey questions:

Question and Type

Type your question and select the type of answer.

Question:

Do you find our resource useful?

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Rating Scale (a matrix of choices or a Likert scale)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Page Separator (inserts a page break into your survey)
- External Data
- BodyReport
- Competency Lookup Field
- Filtered Lookup (Information from all sites in site collection)
- Body Report
- Introduction
- Duration
- Managed Metadata

Select the needed type of answer by choosing the radio button by the name of the needed type:

- Single line of text;

Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

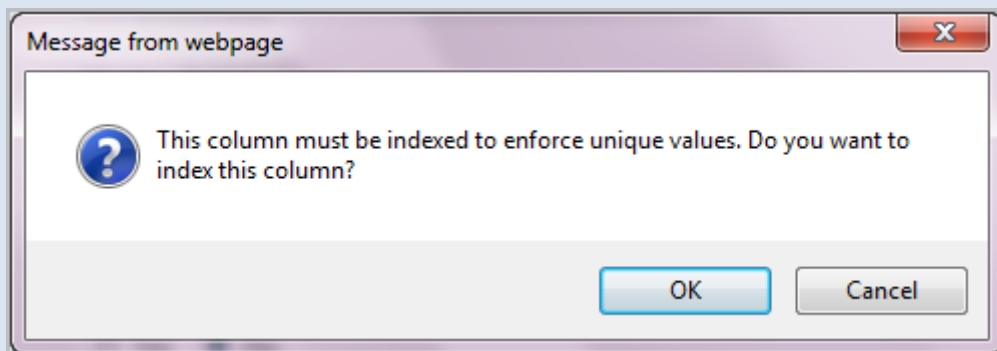
Enforce unique values:
 Yes No

Maximum number of characters:

Default value:
 Text Calculated Value

- Require a response to this question – specify whether the response to the question is obligatory. Select *Yes* if the response is needed, select *No* if it is optional;
- Enforce unique values – specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it;

NOTE: If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:



The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- Maximum number of characters – specify the maximum number of characters to be entered when answering. By default, the value is 255;
- Default value – specify whether the default value should be Text or Calculated Value. Select the corresponding radio button.

– Multiple lines of text;

Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Number of lines for editing:

Specify the type of text to allow:
 Plain text
 Enhanced rich text (Rich text with pictures, tables, and hyperlinks)

- Require a response to this question – specify whether the response to the question is obligatory. Select *Yes* if the response is needed, select *No* if it is optional;
- Number of lines for editing – set the number of lines for editing. The default number is 6.
- Specify the type of text to allow – set the text format for answering. Select the needed radio button. You may choose either Plain text or Enhanced rich text (Rich text with pictures, tables and hyperlinks). Check the needed radio button by the name of the needed text type.

– Choice (menu to choose from);

Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

Yes, the resource is very useful
 No, it is too difficult to use
 I haven't seen your resource yet

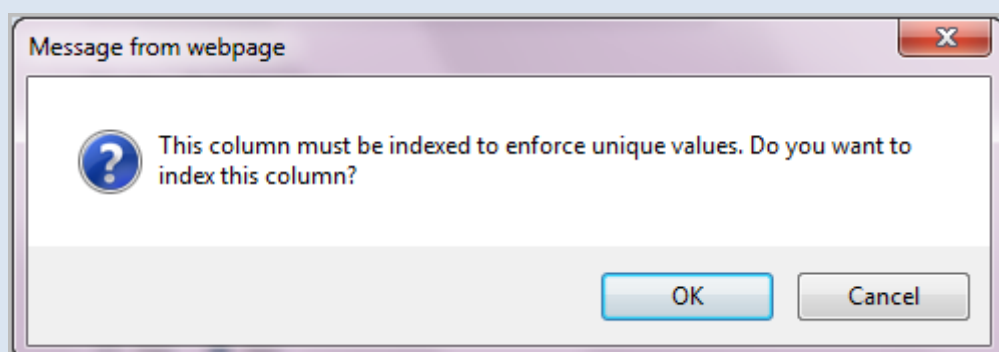
Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it.

NOTE: If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:



The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- Type each choice on a separate line – fill in the box, typing the possible answers as separate lines;
- Display choices using – specify the way you want to display the possible variants of the survey answers. It may be Drop-Down Menu, Radio Buttons and Checkboxes. Select the needed radio button by the name of the needed choice type;
- Allow “Fill in” choices – select Yes, if you want to allow “Fill-in” choices, select No, if you do not want to activate;
- Default value - specify whether the default value should be Text or Calculated Value. Select the corresponding radio button.

– Rating Scale (a matrix of choices or a Likert scale);

A Rating Scale question consists of a question and sub-questions that are rated on a scale such as 1 to 5.

Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

A rating scale question consists of a question and sub-questions that are rated on a scale such as 1 to 5. Type a question into the Question box, and then type sub-questions that support the main question. Select a Number Range to define the number of options that users can choose from. The Range Text appears above the option buttons to describe the meaning of the scale, such as Low, Average, and High or Strongly Disagree, Neutral, and Strongly Agree. Use the N/A option if you want users to select N/A or a similar response, if a question is not applicable.

Require a response to this question:
 Yes No

Type each sub-question on a separate line:

Has it made the certification process easier?
 How long have you used the resource?
 Do you use it separately or with other our products?

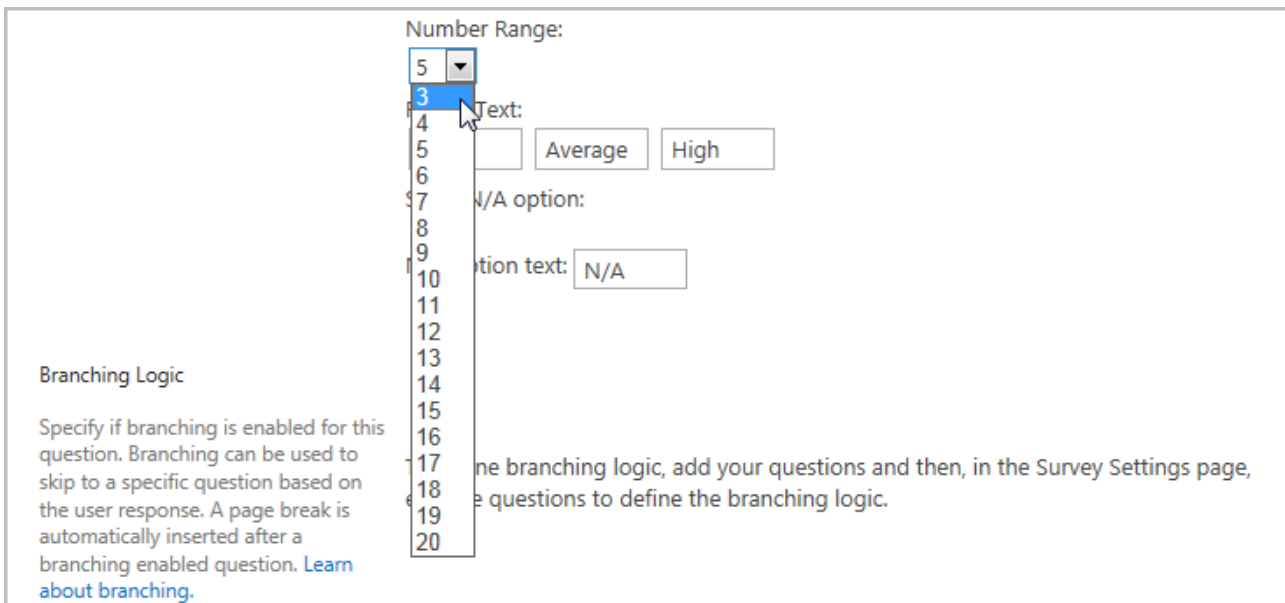
Number Range:

Range Text:

Show N/A option:

N/A option text:

- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Type each sub-question on a separate line – fill in the box, typing the possible answers as separate lines;
- Number range – select a number range to define the number of options that users can choose from when answering. Click the down arrow to open the drop-down menu:



Number Range:

5

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

Text:

Average High

N/A option:

N/A option text: N/A

Branching Logic

Specify if branching is enabled for this question. Branching can be used to skip to a specific question based on the user response. A page break is automatically inserted after a branching enabled question. [Learn about branching.](#)

When branching logic, add your questions and then, in the Survey Settings page, define the branching logic.

By default, the maximum number to be specified is 20.

- Range text - appears above the option buttons to describe the meaning of the scale, such as *Low*, *Average*, and *High* or *Strongly Disagree*, *Neutral*, and *Strongly Agree*. The user can set the text value for the field herself/himself. Then when answering he/she should select the radio button under the name of the needed answer;
- Show N/A option – specify whether you want to have such answer variant as No Answer. To activate the option select the check box by the name of the option.
- N/A option text – specify the text line for the option.
 - Number;

Select this answer type if you want to specify the answer in numbers. Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

You can specify a minimum and maximum allowed value:
 Min: Max:

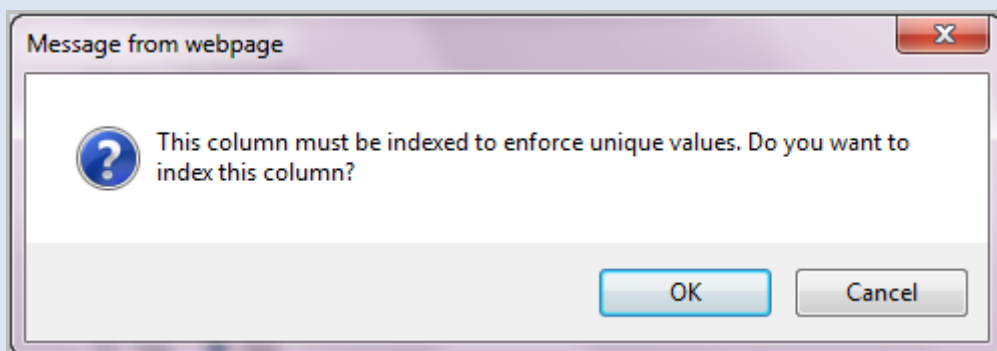
Number of decimal places:

Default value:
 Number Calculated Value

Show as percentage (for example, 50%)

- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it.

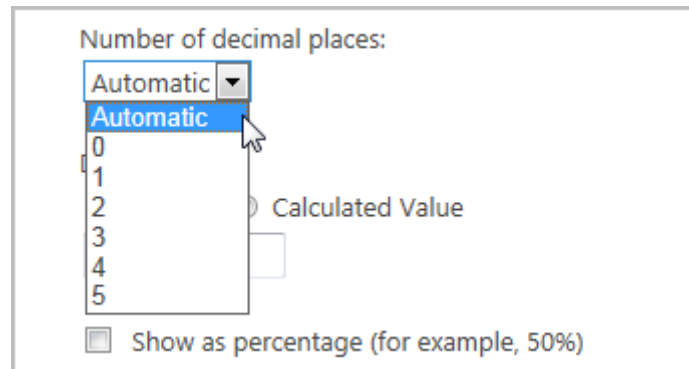
NOTE: If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:



The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

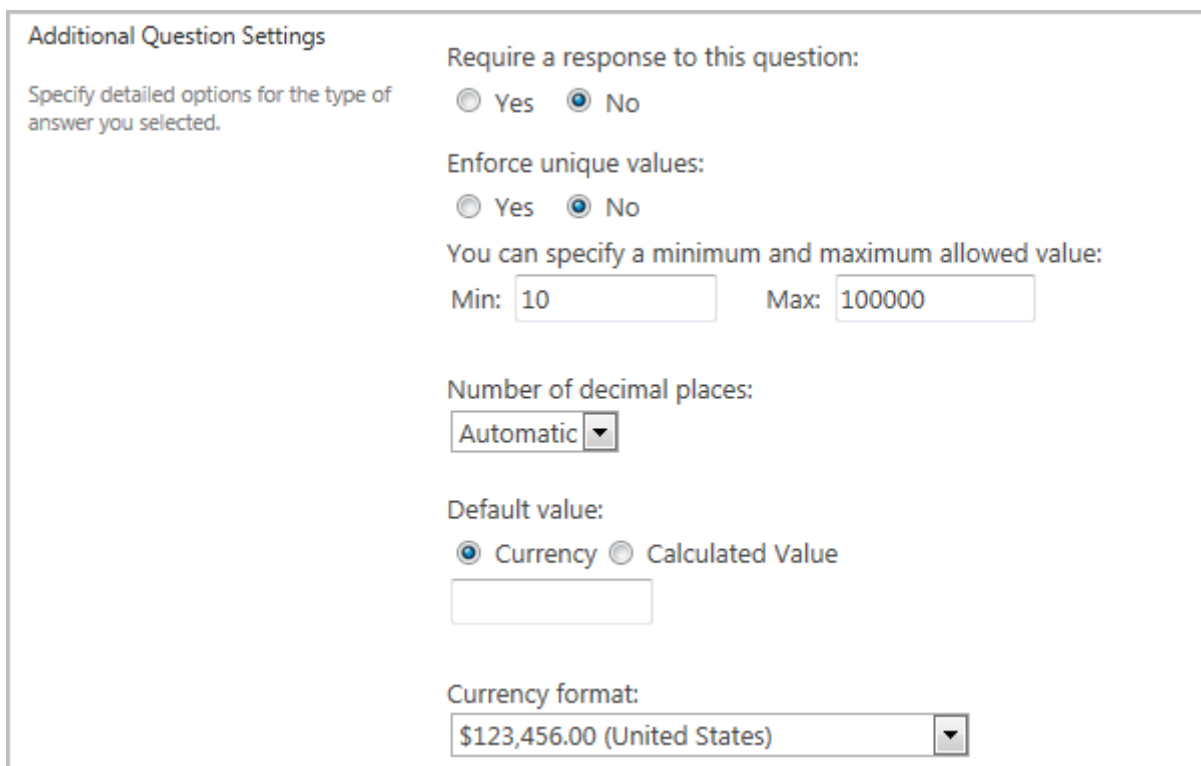
- You can specify a minimum allowed value – fill in Min and Max fields to specify the minimum and maximum values for the survey answer;

- Number of decimal places – set the number of decimal places by opening the drop-down by the name of the option:



- Default value - specify whether the default value should be Number or Calculated Value. Select the corresponding radio button;
 - Show as percentage (for example, 50 %) – select the check box to show the answer as percentage.
- Currency;

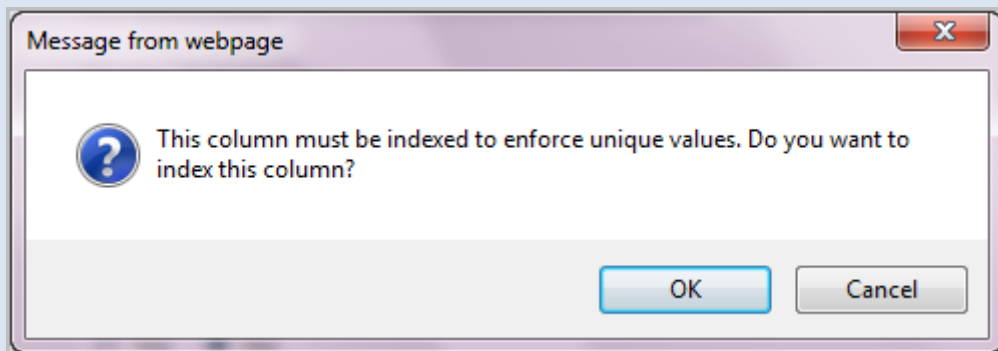
The answer presupposes mentioning some currency value. Specify the additional settings filling in the form:



- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;

- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it.

NOTE: If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:



The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- You can specify a minimum allowed value – fill in Min and Max fields to specify the minimum and maximum values for the survey answer;
- Number of decimal places – set the number of decimal places by opening the drop-down by the name of the option;
- Default value - specify whether the default value should be Currency or Calculated Value. Select the corresponding radio button;
- Currency Format – click the down arrow to open the drop-down menu to specify the currency format:

Additional Question Settings

Specify detailed options for the type of answer you selected.

- 123,456.00 Din. (Serbia, Latin)
- 123,456.00 € (Montenegro)
- 123,456.00 Дин. (Serbia, Cyrillic)
- \$123,456.00 (Singapore)
- 123,456.00 € (Slovakia)
- 123,456.00 € (Slovenia)
- R 123,456.00 (South Africa)
- 123,456.00 € (Spain)
- ₹ 123,456.00 (Sri Lanka)
- 123,456.00 kr (Sweden)
- Fr. 123,456.00 (Switzerland)
- 123,456.00 ل.س. (Syria)
- NT\$123,456.00 (Taiwan)
- 123,456.00 Т.р. (Tajikistan)
- ฿123,456.00 (Thailand)
- TT\$123,456.00 (Trinidad and Tobago)
- 123,456.00 د.ت. (Tunisia)
- 123,456.00 ₺ (Turkey)
- 123,456.00m. (Turkmenistan)
- 123,456.00₴ (Ukraine)
- 123,456.00 ا.د. (United Arab Emirates)
- £123,456.00 (United Kingdom)
- \$123,456.00 (United States)**
- \$U 123,456.00 (Uruguay)
- 123,456.00 so'm (Uzbekistan)
- 123,456.00 сўм (Uzbekistan)
- Bs. F. 123,456.00 (Venezuela)
- 123,456.00 ₫ (Vietnam)
- 123,456.00 ر.ي. (Yemen)
- Z\$123,456.00 (Zimbabwe)

Wed value:

- Date and Time;

The answer presupposes mentioning some time and date. Specify the additional settings filling in the form:

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Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

Date and Time Format:
 Date Only Date & Time

Display Format:
 Standard Friendly

Default value:
 (None)
 Today's Date

Enter date in M/D/YYYY format.

Calculated Value:

- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it;
- Date and Time Format – specify the date and time format. Select Date Only or Date and Time. Select the corresponding radio button;
- Default value – specify Default value. You can set (None), Today's Date value selecting the radio buttons. Also you can specify your own date filling in the empty field or you can set the Calculated Value.

– Lookup (information already on this site);

The answer presupposes using some information from the site. Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

Get information from:

In this column:

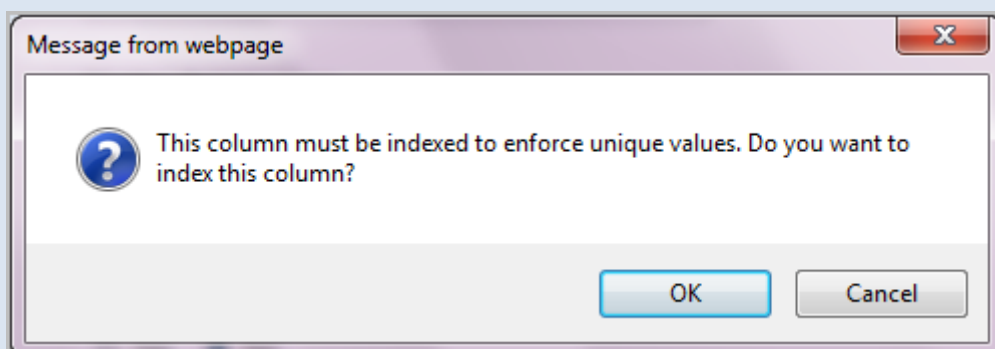
 Allow multiple values

Add a column to show each of these additional fields:

- Title
- Due Date
- ID
- Modified
- Created
- Version
- Title (linked to item)

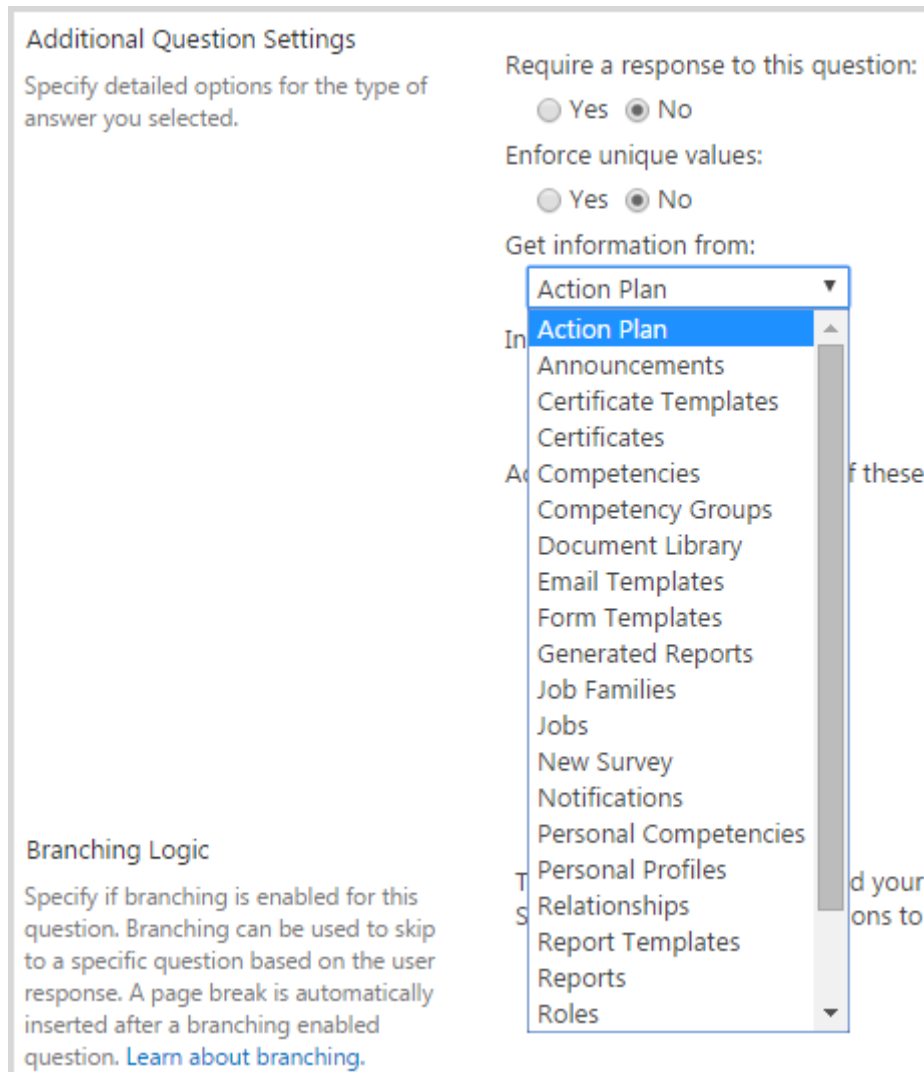
- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it.

NOTE: If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:

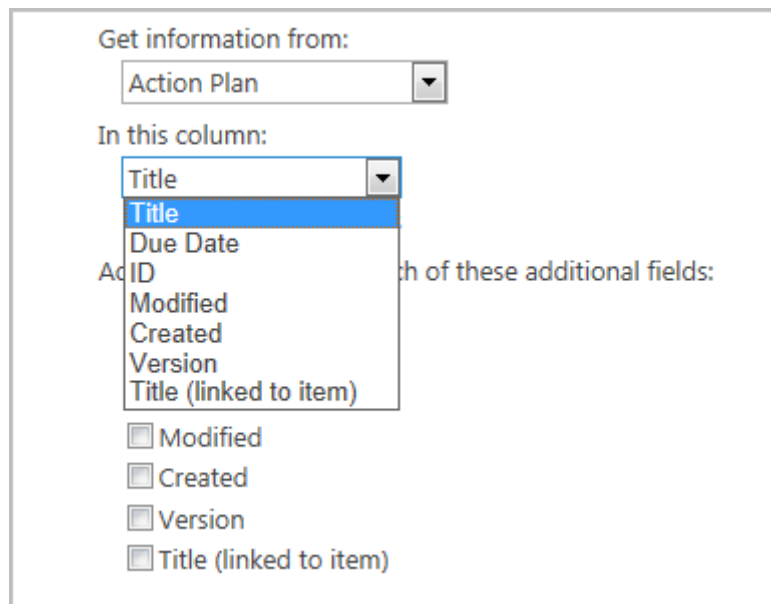


The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- Get information from – specify the source where the user can get the information from. To do that, click the down arrow to open the drop-down menu:



- In this column – specify what is in this column. To do that click the down arrow to open the drop-down menu:



Get information from:
 Action Plan

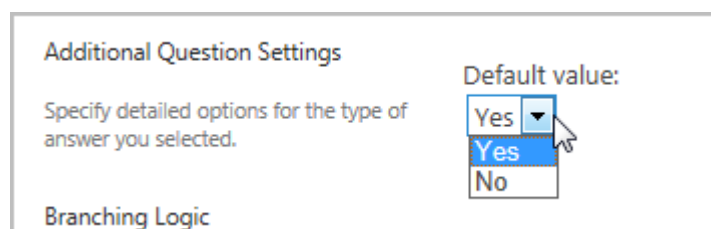
In this column:
 Title

Additional fields:

- Modified
- Created
- Version
- Title (linked to item)

- Allow multiple values – select the check box to allow multiple values;
 - Add a column to show each of these additional fields – select the check box by the name of the column you want to add.
- Yes/No (check box);

The answer presupposes a certain answer to the question: Yes or No. Specify the additional settings filling in the form:



Additional Question Settings

Specify detailed options for the type of answer you selected.

Branching Logic

Default value:
 Yes
 Yes
 No

Click the down arrow to open the drop-down menu to specify the default value answer. Select Yes or No from the menu.

- Person or Group;

The answer presupposes selecting a certain name. Specify the additional settings filling in the form:

Additional Question Settings

Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

Allow multiple selections:
 Yes No

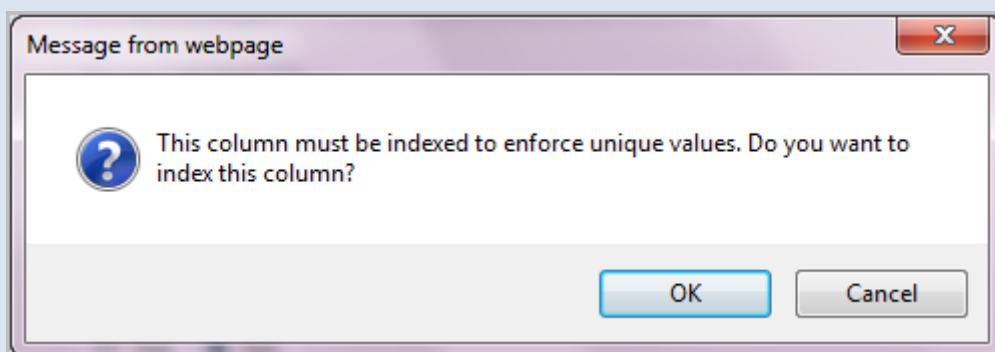
Allow selection of:
 People Only People and Groups

Choose from:
 All Users
 SharePoint Group:

Show field:

- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it.

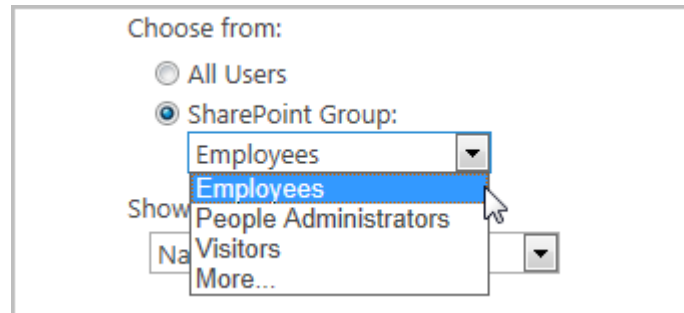
NOTE: If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:



The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- Allow multiple selections – select Yes to allow multiple selections. Select No if you do not want multiple selections;

- Allow selection of – specify who you would like to allow selection of. You may choose either People Only or People and Groups. To do that, check the corresponding radio button. Once you have checked the SharePoint Group radio button, specify a certain group you want to choose by clicking the down arrow below the SharePoint Group radio button:






- Show field – open the drop-down menu to specify the field you want to show.
 - External Data;

The answer presupposes selecting certain data. Specify the additional settings filling in the form:

Additional Question Settings
Specify detailed options for the type of answer you selected.



Require a response to this question:
 Yes No

External Content Type:
  

Select the Field to be shown on this column:
 

Display the actions menu

Link this column to the Default Action of the External Content Type



- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- External Content Type – specify the external content type filling in the corresponding field. Once you have done it, you may click  to check whether the External Content Type you have mentioned exists. Use the picker  to select the existing External Content Type;


NOTE: If the user has not specified the External Content Type correctly, he/she will get the following notification:

No exact match was found. Click the item(s) that did not resolve for more options. You can also use Select button to choose an External Content Type:

Additional Question Settings
Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

External Content Type:
  
No exact match was found. Click the item(s) that did not resolve for more options. You can also use Select button to choose an External Content Type.

Select the Field to be shown on this column:
 

Display the actions menu

Link this column to the Default Action of the External Content Type

- Display the actions menu – select the check box if you want to display the actions menu;
- Link this column to the Default Action of the External Content Type – select the check box by the name of the option you want to link the column to the Default Action of the External Content Type.

– Introduction;

The considered type presupposes a detailed introduction to the answer. Specify the additional settings filling in the form:

Additional Question Settings
Specify detailed options for the type of answer you selected.

Description:

– Managed Metadata;

Specify the additional settings filling in the form:

Additional Question Settings
Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the

answer has become unique and User 2 cannot give the same answer. The system will not take it:

Multiple Value field

Specify whether the column will allow more than one value

Note: allowing multiple values will prevent sorting in list views.

Allow multiple values

Display format

The value selected from the term set can be displayed either as a single value or with the full hierarchical path.

Display Value:

Display term label in the field

Display the entire path to the term in the field



Example:
 Single value - *City*
 Full hierarchical path - *Location, Continent, Country/Region, City*


- Allow multiple values – specify whether the column will allow more than one value. To do that, select the corresponding check box;
- Display format – the value selected from the term set can be displayed either as a single value or with the full hierarchical path;
 - ✓ Display Value – specify how you would like the value to be displayed. Select either Display term label in the field radio button or Display the entire path to the term in the field radio button:

Term Set Settings

Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values.

After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.


Use a managed term set:
Find term sets that include the following terms.
  

▸  SP2013-Managed-Metadata

Customize your term set:
A custom term set will be available to other users in the site collection, however its terms will not be offered as suggestions in Enterprise Keywords columns.

Description

[Edit Using Term Set Manager](#)

- Term Set Settings - enter one or more terms, separated by semicolons and select Find  to filter the options to only include those which contain the desired values.

After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.

- 1) Click Next Question to specify the next question OR click Finish to finish creating the Survey OR Cancel to cancel the Survey creation.

8.1.2 Create Template-based Survey

To create a template-based survey, follow the steps given below:

- 1) On the left side menu click Surveys;
- 2) Once you have done it, the following page will appear:

Surveys ⓘ

Name	Description	Start Date	End Date
Published			
Survey 2		3/14/2016 12:00:00 AM	3/15/2016 12:00:00 AM

3) Click Create from template button. Once you have done it, the following form will appear:

Surveys ▸ Create Survey From Template ⓘ

Template

Survey 1

Survey 4

4) Select the needed template by clicking the cursor arrow on its name. Click OK to proceed, click Cancel to omit your choice;

5) Once you have clicked OK, the New Survey form will appear. Fill in the form:

Site Contents ▸ New

Name and Description
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

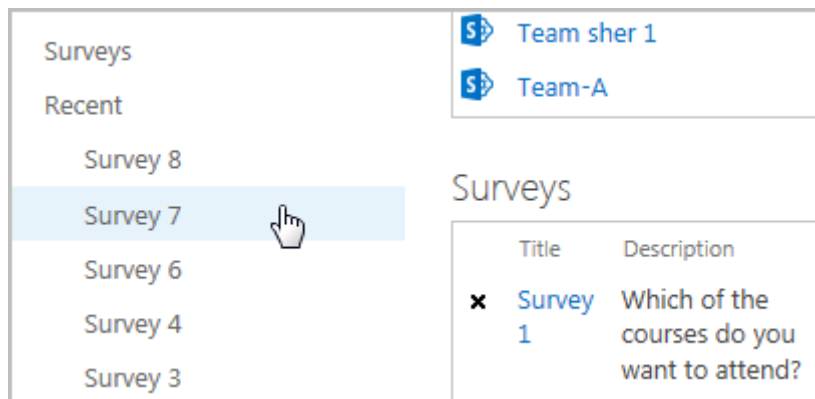
– Name and Description – specify the name of the survey as you want it to appear in headings and links throughout the site. Fill in Description field;

6) Click Create to finish the process of Survey creating. Click Cancel to omit the changes.

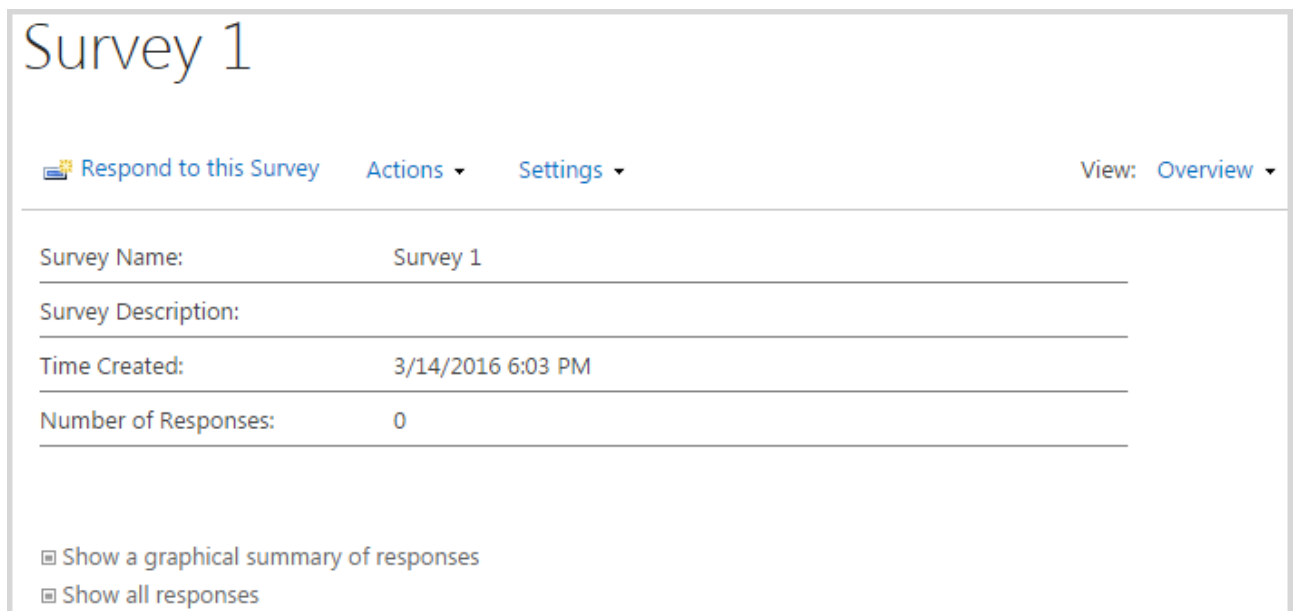
8.2 Add Question to Survey

Once you have created the Survey, you can still add the questions to your Survey if you want. To add a question to the survey, do the following:

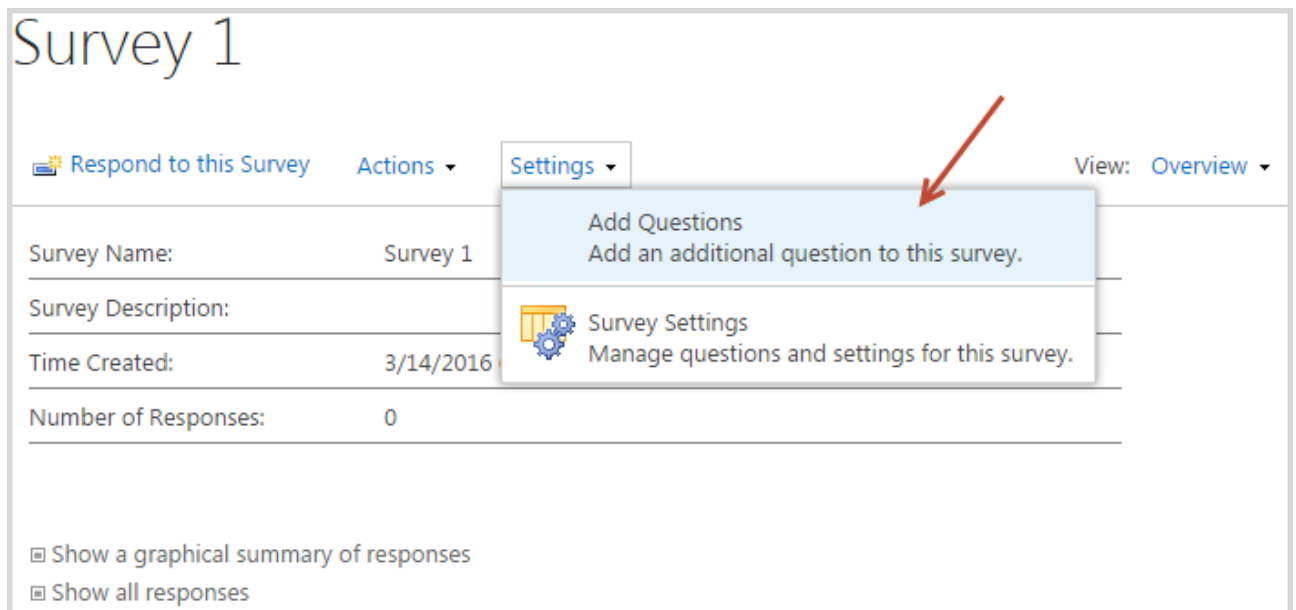
- 1) On the host home page, click the survey link on the left side bar to overview the survey information:



- 2) Once you have done it, you will be redirected to the Survey Overview page:



- 3) Put the cursor arrow on Settings button and click the down arrow to open the drop-down menu:



Survey 1

Respond to this Survey Actions ▾ Settings ▾ View: Overview ▾

Survey Name:	Survey 1
Survey Description:	
Time Created:	3/14/2016
Number of Responses:	0

- Add Questions
Add an additional question to this survey.
- Survey Settings
Manage questions and settings for this survey.

Show a graphical summary of responses

Show all responses

- 4) You will the Survey Question form. Fill in the form following the directions covered in [section Creating Surveys](#).

8.3 Manage Survey

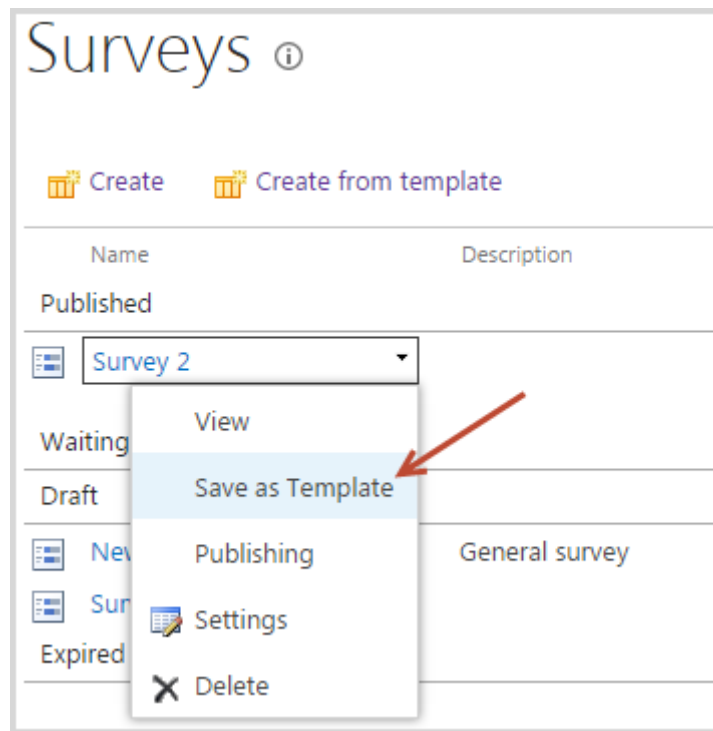
The process of managing SharePoint CCM Surveys is many formed and gives the users a wide range of possibilities to work with the Survey items. The user can:

- Save the Surveys as Templates;
- Enable publishing;
- Change the Survey settings;
- Delete the chosen Survey.

8.3.1 Saving Surveys as Templates

To Survey as a template, follow the steps given below:

- 1) On the host home page, click the Survey link on the left side bar OR click the Survey link in the page field;
- 2) Once you have done it, you will see the Surveys list. Put the cursor arrow on the name of the needed survey. Click the orange down arrow by the name of the needed survey to open the edit content block drop-down menu:



- 3) Select Save as Template from the drop-down;
- 4) Fill in the open form to save the Survey as a template:
 - File Name – enter the name for the template file;
 - Name and Description – enter the Template name and Template description. The name and description of this template will be displayed on the Create page;
 - Include content - include content in your template if you want new surveys created from this template to include the items in this survey. Including content can increase the size of your template. To include the content in the considered template, select the corresponding check box.

NOTE: Item security is not maintained in a template. If you have private content in this survey, enabling this option is not recommended.

Settings ▸ Save as Template ⓘ

File Name

Enter the name for this template file.

File name:

Name and Description

The name and description of this template will be displayed on the Create page.

Template name:

Template description:

Include Content

Include content in your template if you want new surveys created from this template to include the items in this survey. Including content can increase the size of your template.

Include Content

Caution: Item security is not maintained in a template. If you have private content in this survey, enabling this option is not recommended.

- 1) Click OK to save changes OR click Cancel to abandon the changes;
- 2) Once you have clicked OK, you will get the following notification:

CCMhost ▸ Operation Completed Successfully

The template has successfully been saved to the list template gallery. You can now create lists based on this template.

To manage templates in the gallery, go to the [list template gallery](#).

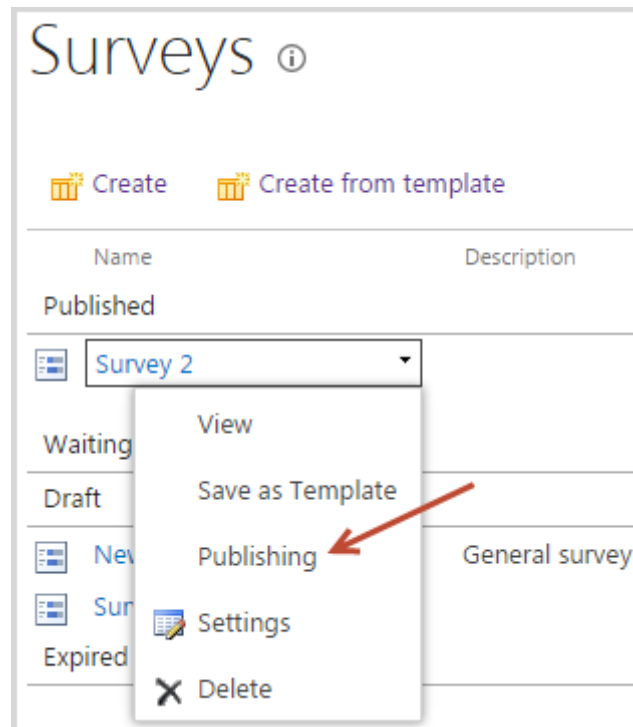
To return to the list customization page, click **OK**.

- 3) Click list template gallery link to manage the templates OR click OK to return to the list customization page.

8.3.2 Publishing Surveys

To publish a survey, do the following:

- 1) On the host home page, click the Survey link on the left side bar OR click the Survey link in the page field;
- 2) Once you have done it, you will see the Surveys list. Put the cursor arrow on the name of the needed survey. Click the orange down arrow by the name of the needed survey to open the edit content block drop-down menu:



- 3) Click Publishing. Once you have done it, the following form will appear:


Survey 2 › Survey Settings › Publishing ⓘ


Item-level Permissions
Specify which responses users are allowed to read

Allow show all responses?
 Yes No



Publishing
Specify publishing options





Schedule
 Yes No

Start Date
 

End Date
 

Audience
You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

- 4) Fill in the form following the prescriptions given below:
 - Publishing – specify the publishing options:
 - Schedule – select Yes to activate the schedule, select No if you do not want to activate the schedule for the published option;
 - Start Date – specify the start date filling in the date (you can do it both manually and using the Calendar button ). Use the drop-down menu to specify the time if needed;
 - End Date - specify the start date filling in the date (you can do it both manually and using the Calendar button ). Use the drop-down menu to specify the time if needed;
 - Audience – specify the user names, group names or e-mail separating those using semicolons. You can use Browse button () to browse the needed names. You can use the Check names button () to check whether the selected names are valid.
- 5) Click OK to save changes OR click Cancel to abandon the changes.

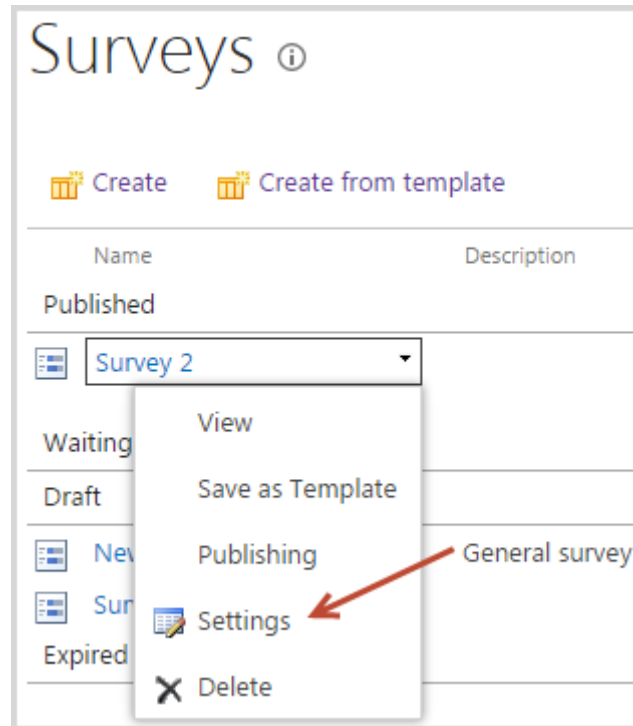
8.3.3 Managing Survey Settings

To manage the Survey settings, you should navigate to the Survey Information List. You can do it in two ways:

I. To navigate the Survey Information List, follow the steps given below:

- 1) On the host home page, click the Survey link on the left side bar OR click the Survey link in the page field;

Once you have done it, you will see the Surveys list. Put the cursor arrow on the name of the needed survey. Click the orange down arrow by the name of the needed survey to open the edit content block drop-down menu:



- 2) Select Settings. Once you have done it, you will be redirected to the Survey Information List:

Survey 1 ▸ Settings

List Information

Name: Survey 1
Web Address: <http://sp2013-iwa/sites/CCMhost/Lists/Survey 1/overview.aspx>
Description: Which of the courses you want to attend?

General Settings

- [List name, description and navigation](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Audience targeting settings](#)
- [Publishing](#)
- [Form settings](#)

Permissions and Management

- [Delete this survey](#)
- [Save survey as template](#)
- [Permissions for this survey](#)
- [Enterprise Metadata and Keywords Settings](#)

Communications

- [RSS settings](#)

Questions

A question stores information about each item in the survey. The following questions are currently available in this survey:

Question	Type of answer	Required	Branching Logic
Type your question here...	Multiple lines of text	✓	
Modified	Date and Time		
Created	Date and Time		

- [Add a question](#)
- [Change the order of the questions](#)


- II. To navigate the Survey Information List, follow the steps given below:
 - 1) On the host main page click the needed Survey on the left side menu OR in the main page field;
 - 2) You will be redirected to the Survey Overview page. Put the cursor arrow on Settings button and click the down arrow to open the drop-down menu:

Survey 1

[Respond to this Survey](#)
Actions ▾
Settings ▾
View: Overview ▾

Survey Name:	Survey 1
Survey Description:	
Time Created:	3/14/2016
Number of Responses:	0

Add Questions
Add an additional question to this survey.

 **Survey Settings**
Manage questions and settings for this survey.

Show a graphical summary of responses
 Show all responses

3) Click Survey Setting to navigate to the Survey Information List.

Once you go to the Survey Information List, you can see the three blocks of Settings:

1) General Settings

❖ Title, description and navigation

Use the link to manage the corresponding settings. Once you click the link, the following form will appear:


Settings ▸ General Settings

Name and Description
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this survey.

Name:

Description:

Navigation
Specify whether a link to this survey appears in the Quick Launch. Note: it only appears if Quick Launch is used for navigation on your site.

 Display this survey on the Quick Launch?
 Yes No

Survey Options
Specify whether users' names will appear in survey results and whether users can respond to the same survey multiple times.

Show user names in survey results?
 Yes No

Allow multiple responses?
 Yes No

- Name and Description – type the new name as you want it to appear in headings and links throughout the site;
- Navigation – specify whether the link to the survey will appear in the Quick Launch. Select Yes, if you want the link to appear in the Quick Launch section; Select No, you do not want the link to appear in the Quick launch section;
- Survey Options – specify whether you want to show the users' names in the survey results.
 - ✓ Show user names in survey results? - select Yes to show the users' names in the survey results. Select No if you do not want to show the users' names in the survey results;
 - ✓ Allow multiple responses – select Yes to allow multiple responses. Select No if you do not want to allow multiple responses.

Click Save to save changes OR click Cancel to abandon the changes.

❖ Advanced Settings

Use the link to manage the corresponding settings. Once you have clicked the link, the following form will appear:

Settings ▸ Advanced Settings

Item-level Permissions

Specify which responses users can read and edit.

Note: Users with the Cancel Checkout permission can read and edit all responses. [Learn about managing permission settings.](#)

Read access: Specify which responses users are allowed to read

- Read all responses
- Read responses that were created by the user

Create and Edit access: Specify which responses users are allowed to create and edit

- Create and edit all responses
- Create responses and edit responses that were created by the user
- None

Search

Specify whether this survey should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.

Allow items from this survey to appear in search results?

- Yes
- No

Reindex List

Click the Reindex Survey button to reindex all of the content in this document library during the next scheduled crawl.

Reindex List

Offline Client Availability

Specify whether this survey should be available for offline clients.

Allow items from this survey to be downloaded to offline clients?

- Yes
- No

Reindex List

Click the Reindex Survey button to reindex all of the content in this document library during the next scheduled crawl.

Reindex List

Offline Client Availability

Specify whether this survey should be available for offline clients.

Allow items from this survey to be downloaded to offline clients?

- Yes
- No

Dialogs

If dialogs are available, specify whether to launch the new, edit, and display forms in a dialog. Selecting "No" will cause these actions to navigate to the full page.

Launch forms in a dialog?

- Yes
- No

Note: Dialogs may not be available on all forms.

OK

Cancel

- Item-level Permissions – specify which responses users can read and edit;
- Read access – specify which responses users are allowed to read. You can select either Read all responses or Read responses that were created by the user radio button;
- Create and Edit access – mark which responses the users are allowed to create and edit. There are the following options;
 - ✓ Create and edit all responses – check the radio button if you want to allow the users to create and edit all responses;
 - ✓ Create responses and edit responses that were created by the user – select the radio button if you intend to allow the users to create responses and edit the responses that were created by the user;
 - ✓ None – check the radio button if you do not intend to allow the users both to create the responses and to edit them.

NOTE: The users with the Manage Lists permission can read and edit all responses.

- Search – the section allows specifying whether the option is visible in search results. To allow the items from the survey to appear in the search results check Yes, if you do not intend to make the items available in the search, select No;

NOTE: The users who do not have permission to see these items will not see them in search results, no matter what this setting is.

- Offline Client Availability – the option allows the user to specify whether the survey under consideration will be available for offline clients. If you want to allow the items from the survey to be downloaded to offline clients, select Yes. If you want the items to be downloaded only to online clients, select No;
- Dialogues - if dialogs are available, specify whether to launch the new, edit, and display forms in a dialog. Select Yes to launch the form in the dialogue. Selecting No will cause these actions to navigate to the full page.

Click OK to save the changes OR click Cancel to abandon the changes.

❖ Validation Settings – the settings are intended to valid the date in the Surveys' column. Use the Validation Settings link to manage the corresponding settings. Once you have clicked the link, the following form will appear:

Settings ▸ Validation Settings

Formula

Specify the formula you want to use to validate data when new items are saved to this list. To pass validation, the formula must evaluate to TRUE. For more information, see Formulas in Help.

Example: `=([Discount]<[Cost])` will only pass validation if column Discount is less than column Cost.

[Learn more about proper syntax for formulas.](#)

Formula:

Insert Column:

- Created
- Modified

[Add to formula](#)

User Message

Type descriptive text that will help site visitors understand what is needed for a valid list item. This description will be shown if the validation expression fails.

User Message:

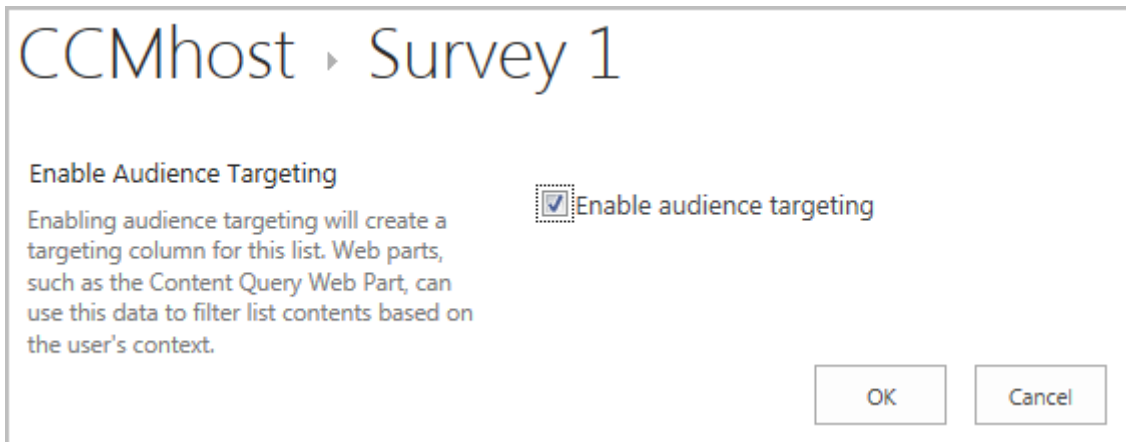
- Formula - specify the formula you want to use to validate the data in this column when new items are saved to this list. Fill in the Formula: field specifying the formula and choose the column to insert in the Insert Column: section. Click Add to formula link to add the chosen column to insert to the Validation formula;

NOTE: To pass validation, the formula must evaluate to TRUE.

- User Message – fill in the field with the descriptive text that will help the site visitors to understand what is needed for a valid list item.

Click Save to save the changes done OR click Cancel to abandon the changes.

- ❖ Audience targeting settings – the option under consideration is intended to enable audience targeting. Once you click the Audience targeting settings link, the following form will appear:



Enable Audience Targeting section is used to create a targeting column for the list. Web parts can use the data to filter list contents based on the user's contexts. Select Enable audience targeting check box to enable the corresponding option.

Click OK to save changes OR click Cancel to abandon the changes.

- ❖ Publishing – the settings are implemented to change and enable the Survey publishing settings.

Once you click the Publishing link, the following form will appear:

Survey 2 ▸ Survey Settings ▸ Publishing ⓘ

Item-level Permissions
Specify which responses users are allowed to read

Allow show all responses?
 Yes No

Publishing
Specify publishing options

Schedule
 Yes No

Start Date

End Date

Audience
You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

ageucheva a; Assistant 3; Hank Moody; Learner 7;

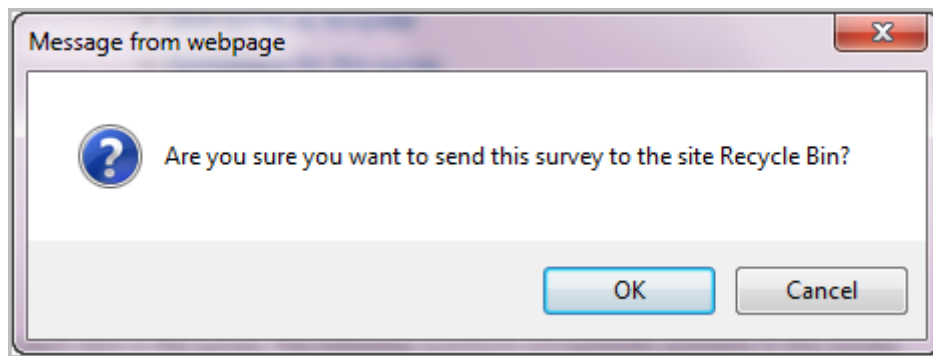
Fill in the form following the prescriptions given below:

- Publishing – specify the publishing options:
 - Schedule – select Yes to activate the schedule, select No if you do not want to activate the schedule for the published option;
 - Start Date – specify the start date filling in the date (you can do it both manually and using the Calendar button). Use the drop-down menu to specify the time if needed;
 - End Date - specify the start date filling in the date (you can do it both manually and using the Calendar button). Use the drop-down menu to specify the time if needed;
- Audience – specify the user names, group names or e-mail separating those using semicolons. You can use Browse button () to browse the needed names. You can use the Check names button () to check whether the selected names are valid.

Click OK to save changes OR click Cancel to abandon the changes.

2) Permissions and Management;

- ❖ Delete this survey - the option under consideration allows the user to delete the needed survey. Once you click the Delete this survey link, the following dialogue box will appear:



Click OK to proceed OR click Cancel to abandon the step of the Survey deletion.

- ❖ Save survey as a template – the option allows the user to save the considered option as a template. Once you click Save survey as a template link, the following form will appear:

Settings ▸ Save as Template ⓘ

File Name
Enter the name for this template file.

File name:

Name and Description
The name and description of this template will be displayed on the Create page.

Template name:

Template description:

Include Content
Include content in your template if you want new surveys created from this template to include the items in this survey. Including content can increase the size of your template.

Caution: Item security is not maintained in a template. If you have private content in this survey, enabling this option is not recommended.

Include Content

Fill in the open form to save the Survey as a template:

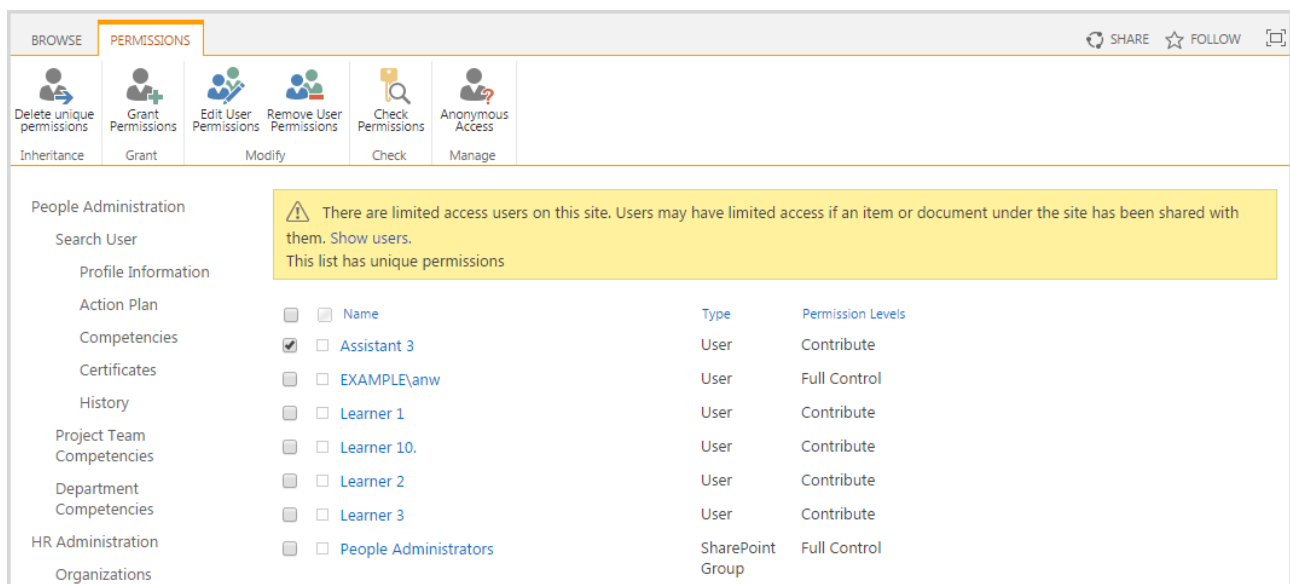
- File Name – enter the name for the template file;

- Name and Description – enter the Template name and Template description. The name and description of this template will be displayed on the Create page.
- Include content – include content in your template if you want new surveys created from this template to include the items in this survey. Including content can increase the size of your template. To include the content in the considered template, select the corresponding check box.

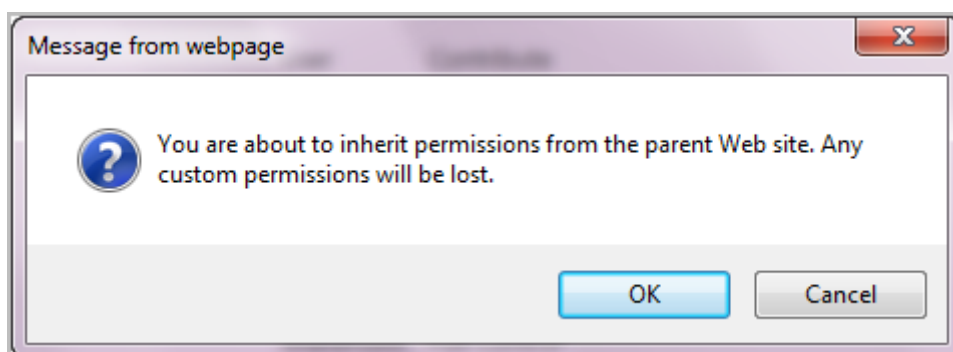
NOTE: Item security is not maintained in a template. If you have private content in this survey, enabling this option is not recommended.

Click OK to save changes OR click Cancel to abandon the changes.

- ❖ Permissions for this survey – the option allows to manage the permissions for the survey. Once you click the Permissions for this survey link, the following list form will appear:

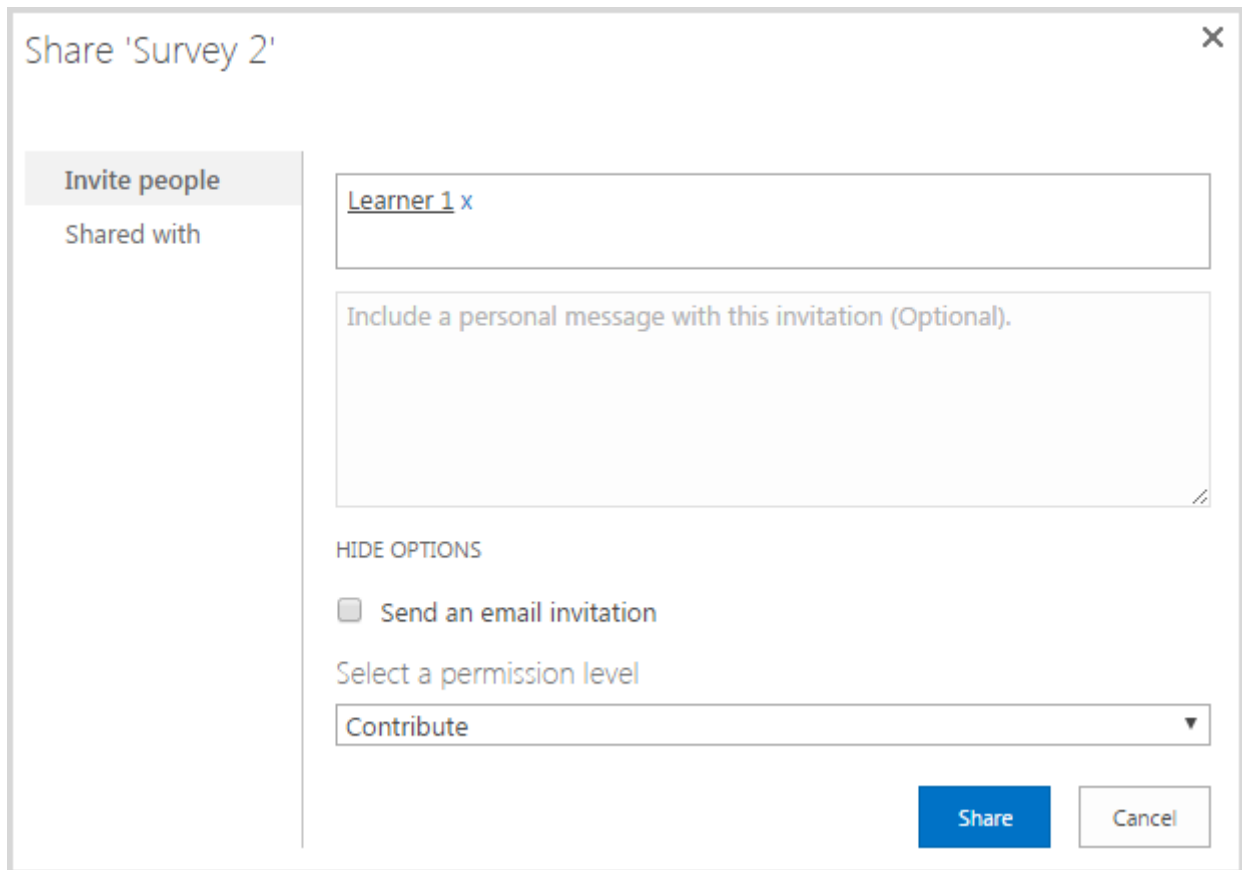


To inherit permission from the Parent web site, click the Delete Unique Permissions button on the ribbon. The following dialogue box will appear, notifying that “You are about to inherit permissions from the parent Web site. Any custom permission will be lost”:



Click OK to proceed OR click Cancel to abandon the changes.

To *grant permissions*, click the Grant Permissions button on the ribbon. Once you have done it, the following form will appear:



- Invite People to – enter the names of the users who you want to give the permissions to. Separate them with semicolons;
- Select a Permission Level - select the permissions you want these users to have. You can add the users to a SharePoint group that has already been granted the appropriate permission levels, or you can grant the users specific permission levels;
 - o Add the users to a SharePoint group – check the radio button to add the users to the SharePoint group which has already been given certain permissions;
 - o Grant users permissions directly – check the radio button to grant the users permissions directly. The option under consideration allows specifying what exact permissions you want to grant certain users or groups;
 - ✓ Full Control – select the check box to grant the user/groups full control of the resource;
 - ✓ Design – select the check box to allow the user/user groups to view, add, update, delete, approve and customize the considered elements;

- ✓ Contribute - select the check box to allow the user/user groups to view , add, update and delete list items and documents;
- ✓ Read – select the check box to allow the user/user groups to view pages and item lists and download the documents;
- Send E-mail – the option is used to send the e-mail to the new users who have been granted the permissions. The links and the site information will be attached to the personal letter;
 - Send welcome e-mail to the new users – select the check box to send the e-mail to the users who have been just granted certain permissions. Specify the Subject and fill in the Personal Message field.

Click OK to save changes OR click Cancel to abandon them.