Competencies & Certifications Module User Guide

Version 4.8.4.45

LMS365

On-Premises

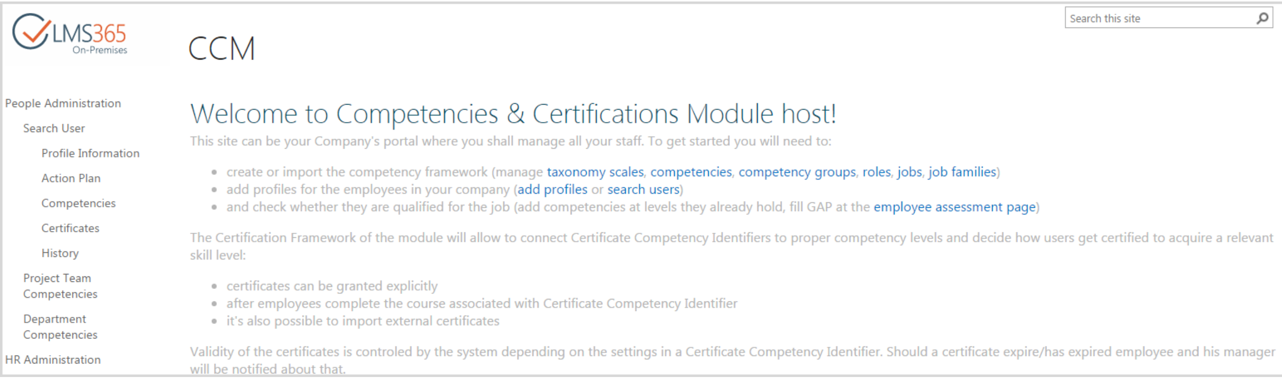
For Microsoft SharePoint Server

ELEARNINGFORCE

CONTENTS

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".

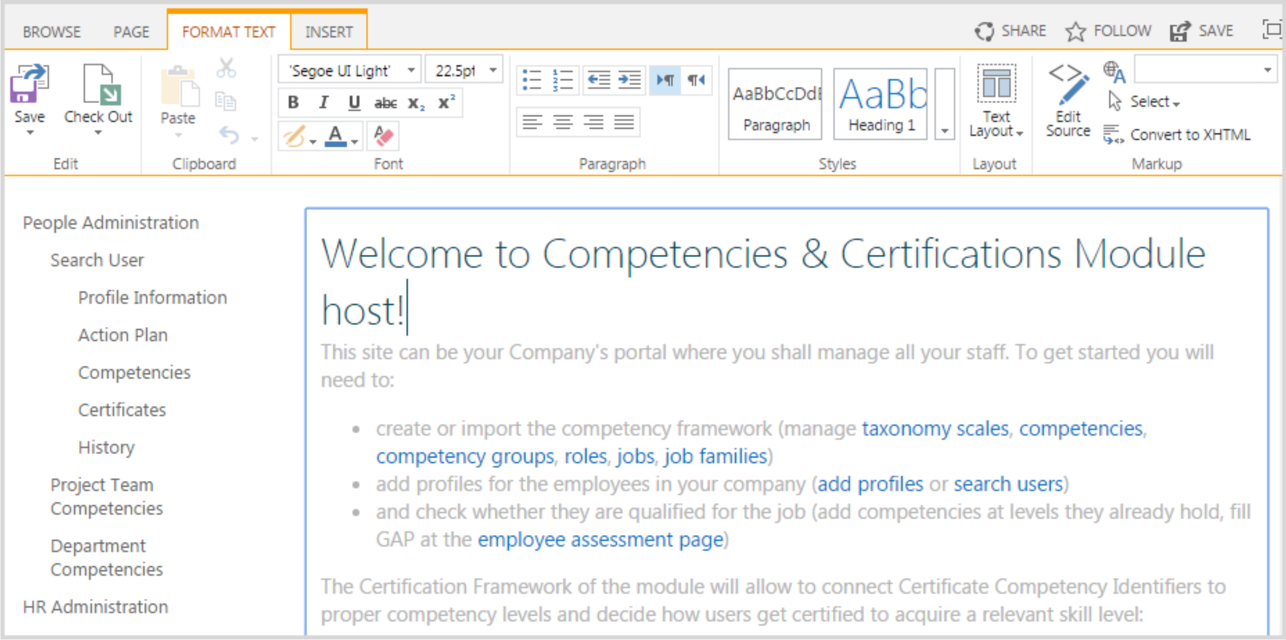
By default, the following web parts are shown once the user navigates the home page:

- 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 competetencies, 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".

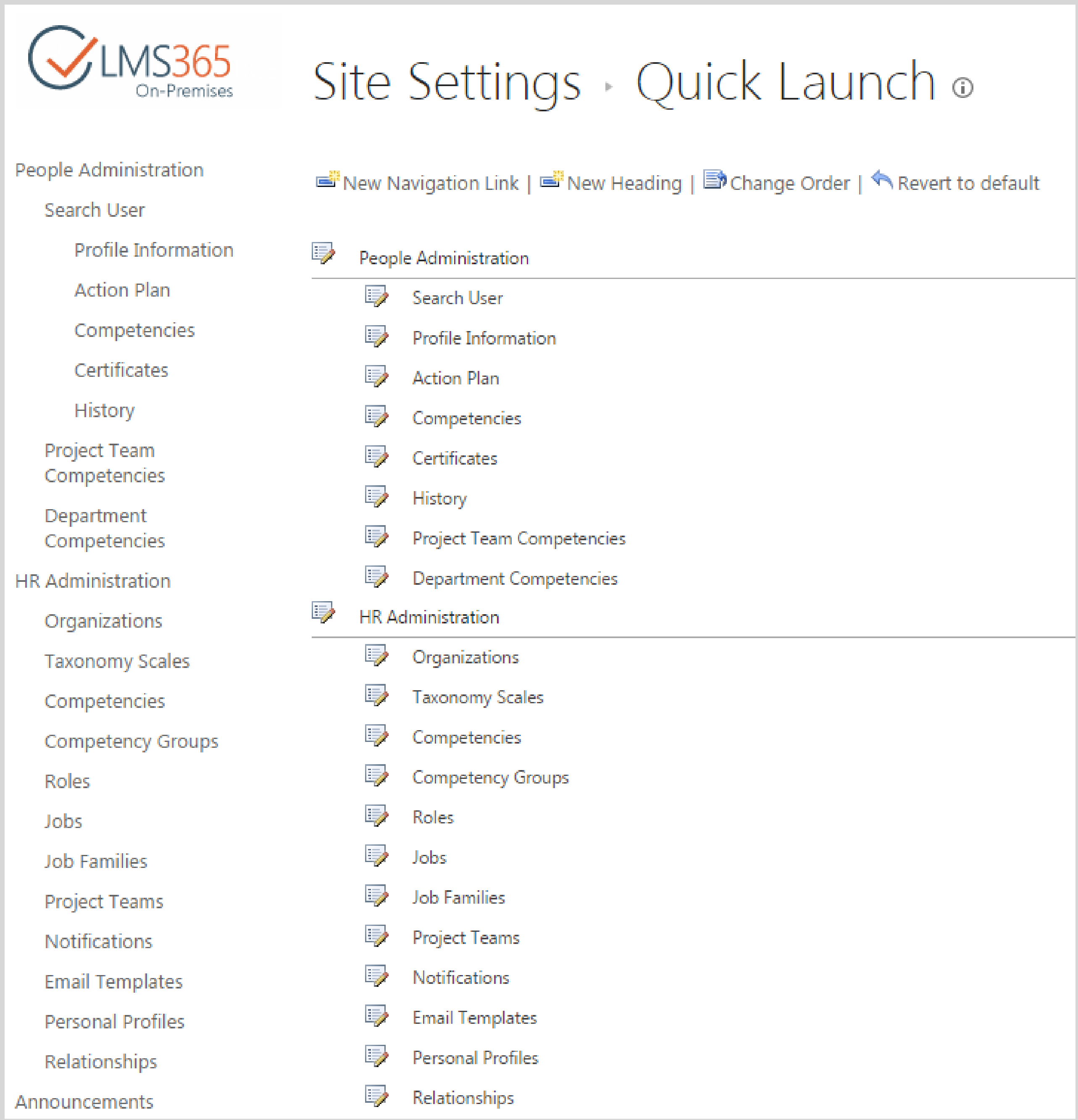
You can customize the visual representation of the home page in the following way :

- 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:

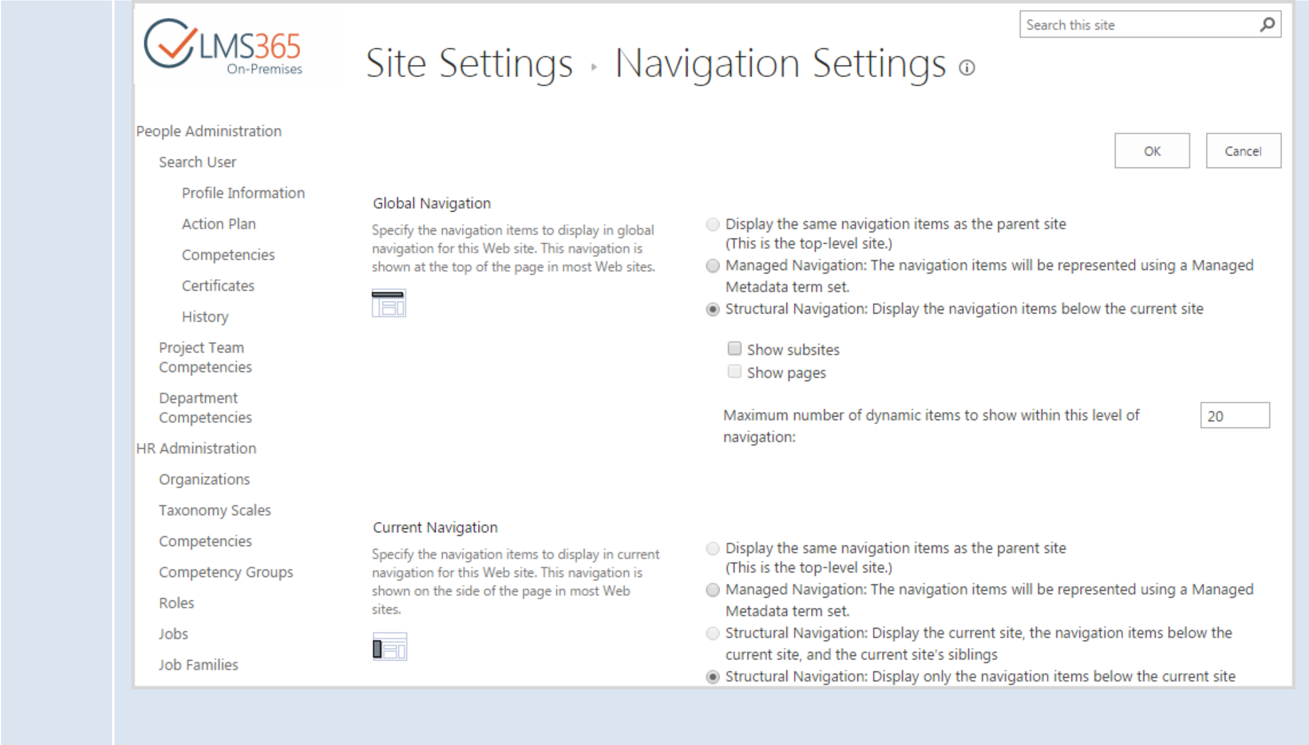


Make the necessary changes to the page. You can enter a special edit mode for each Web Part by clicking on its field (e.g. for 'Content' Web Part 'Format Text' and 'Insert' tabs will appear letting the user manage text font styles; insert tables, pictures, files etc.)

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



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:



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 *Active* profiles along with *Incomplete* ones. *Deactivated* profiles are not considered by the system.
NOTE:	Managers and HR Responsibles 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 Responsibles 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

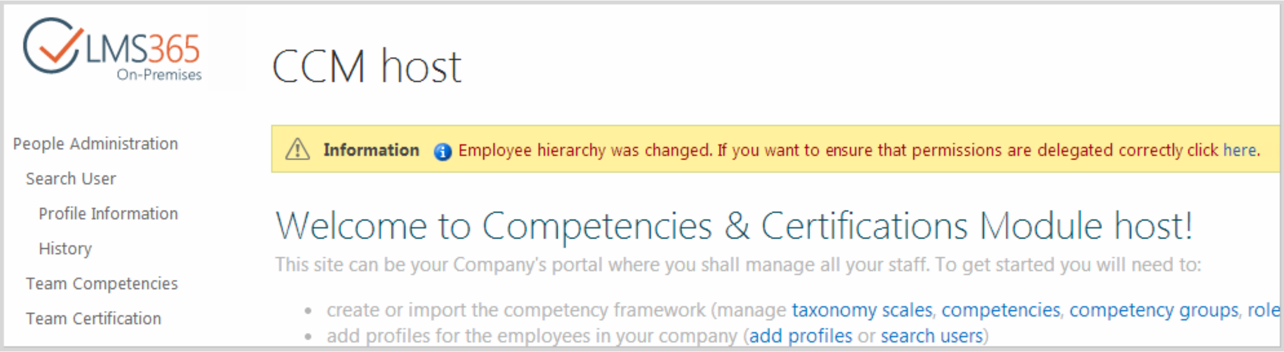
Manage Project Team Profile attributes	Full control in addition to define/modify/ view Team Profile structure	No	No	No	No
Add Project Team	Full	Full	No	No	No
Edit Project Team	Full	Full	No	No	No
Delete Project Team	Full	Full	No	No	No
View Project Team Profile	Full	Within Organization	Only his Team	Only the Team he is a member of	Only the Team he is a member of
Project Team Competencies 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.

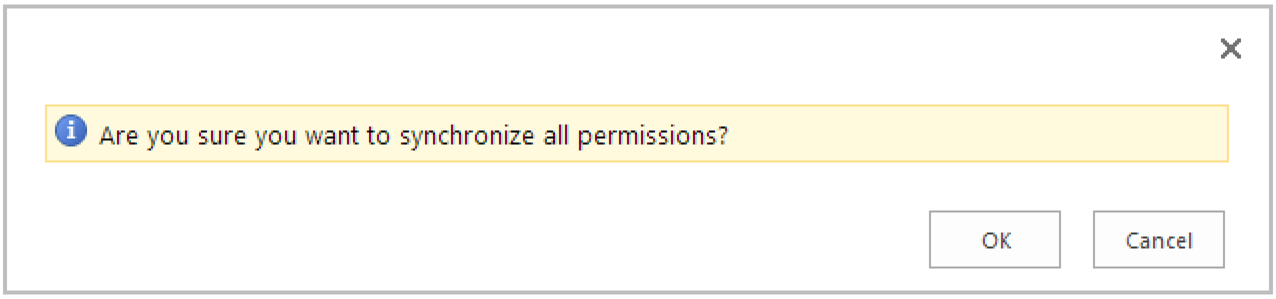
Users' permissions are changed after the following actions:

- 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:



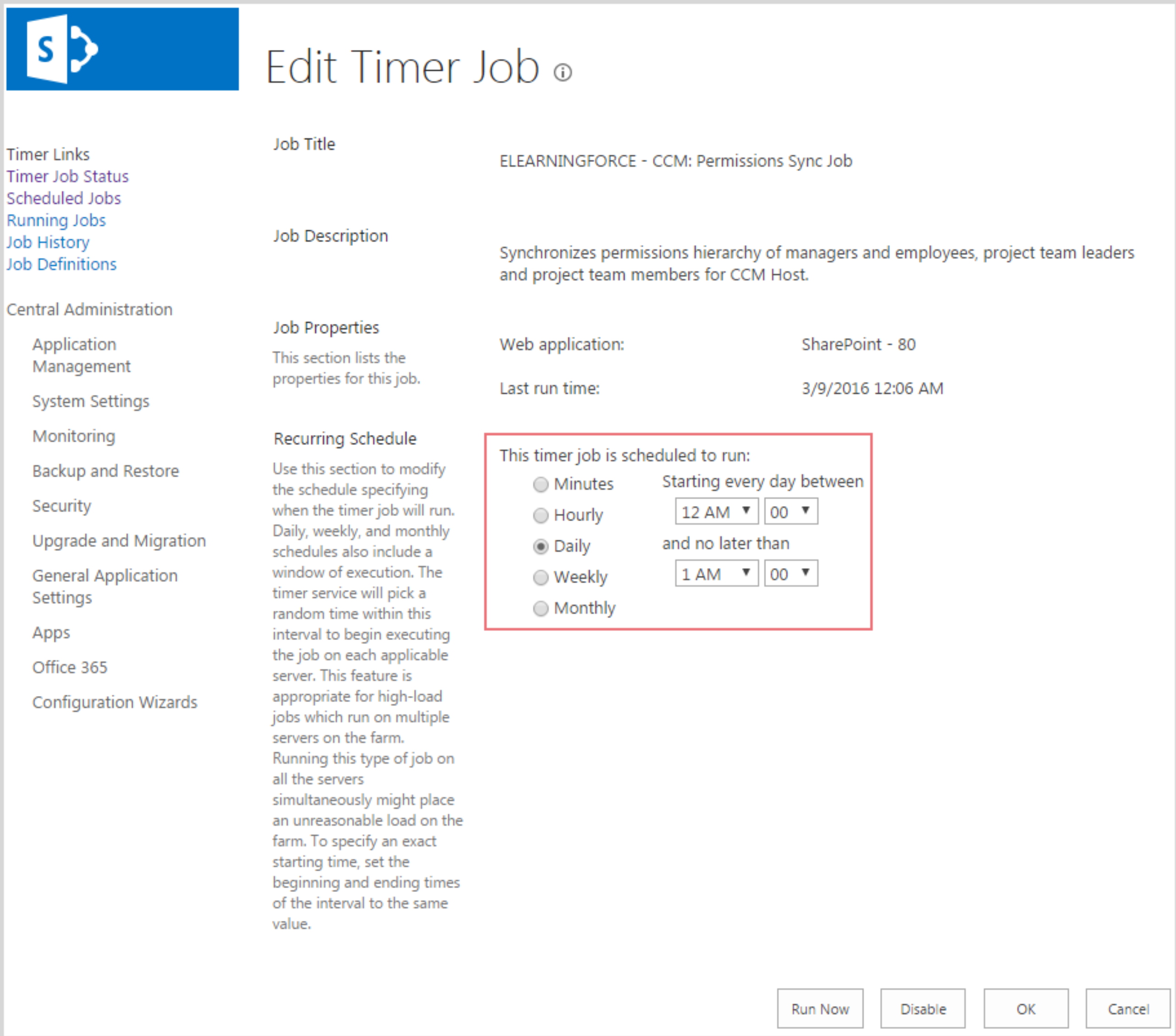
To apply permissions changes, click the link in the message to run the ELEARNINGFORCE - CCM: Permissions Sync Job and confirm synchronization:



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

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

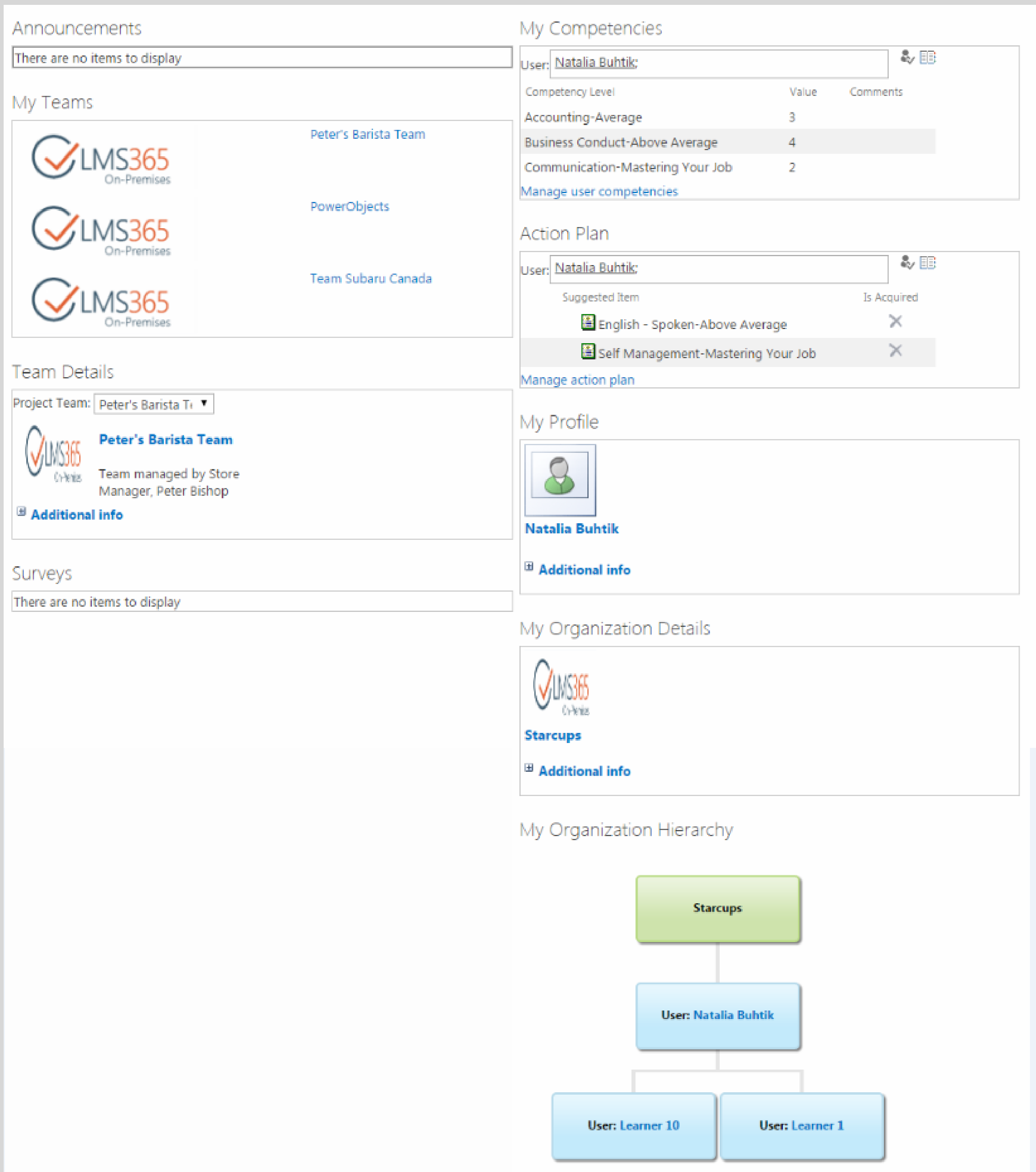
1) Navigate to the Central Administration;
2) Choose Check job status in the Monitoring;
3) Choose the ELEARNINGFORCE - CCM: Permissions Sync Job;
4) Set the run time to the desired interval:



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:



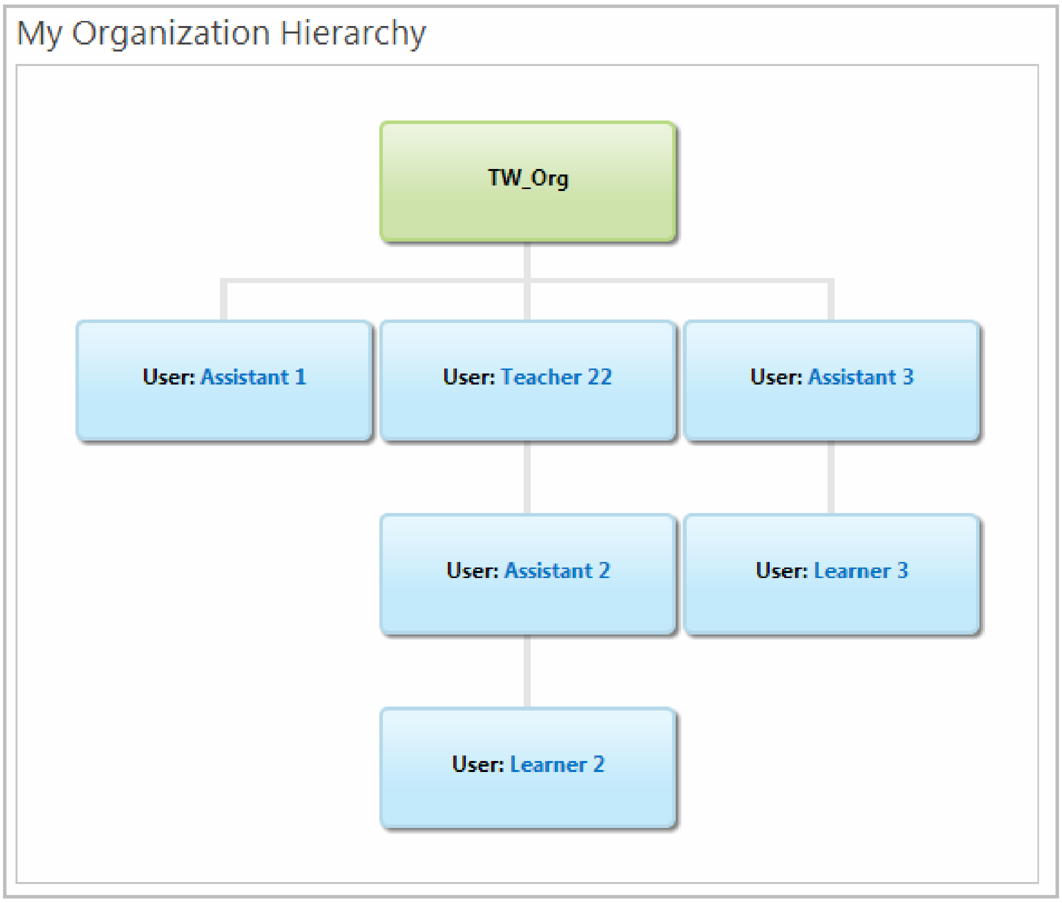
- Announcements – displays the information regarding the announcement for the considered organization;
- My Project Teams – shows the list of the SharePoint CCM current project teams;
- Project Team Details – contains the main information about project teams;
- Surveys – shows the list of SharePoint 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:



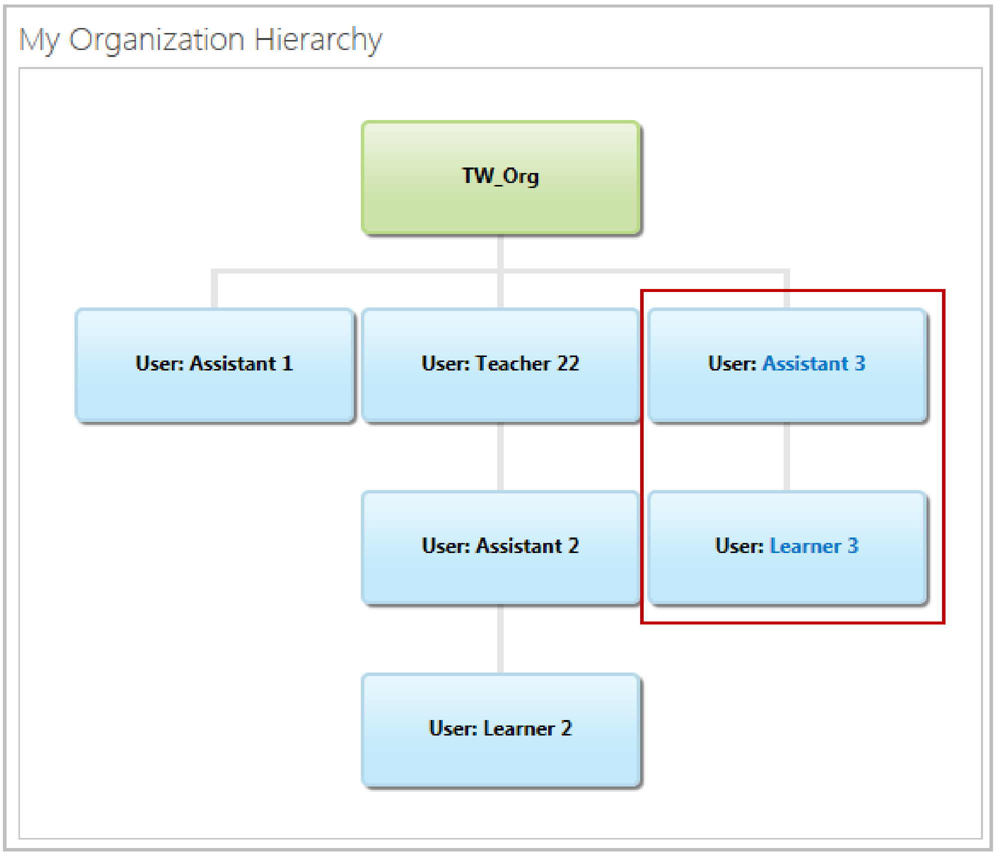
The structure of the organization hierarchy is built based on the information about Managers in User Profiles. Users added to 'HR Responsible' field and set as Managers in Relationships section are not displayed in the hierarchy. For the buildup of the hierarchy, only users with "Active" status are taken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

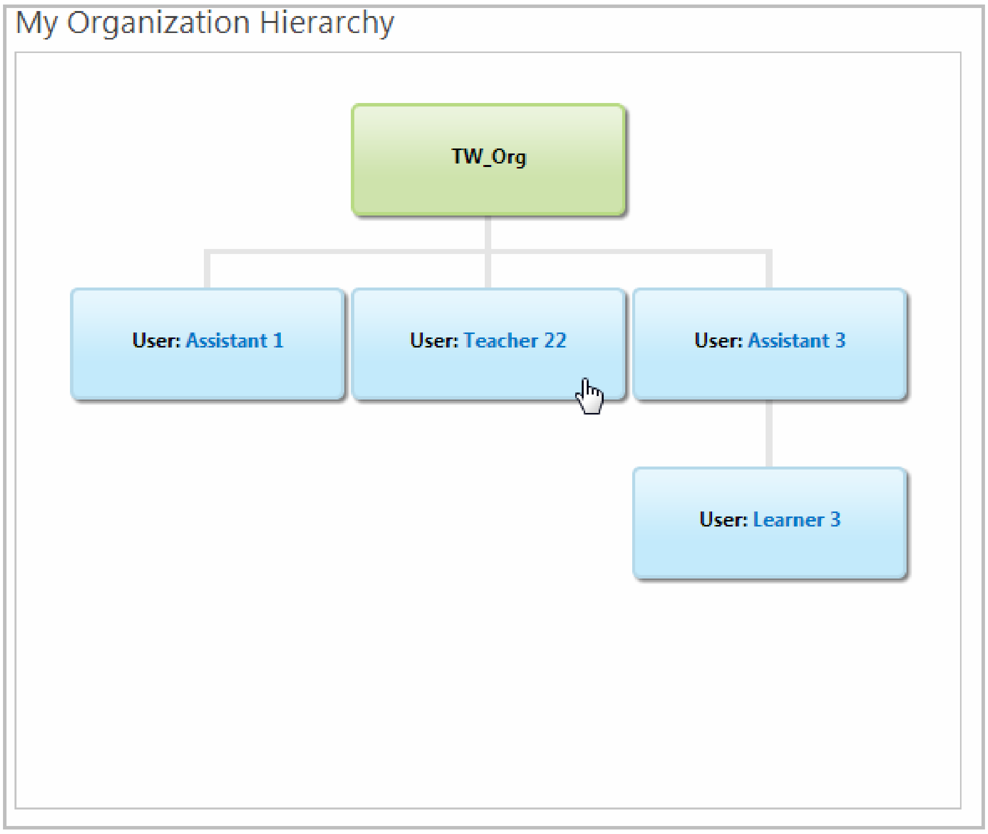
Manager of any level of the organization hierarchy is able to edit information of employee who is lower in the hierarchy.

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.

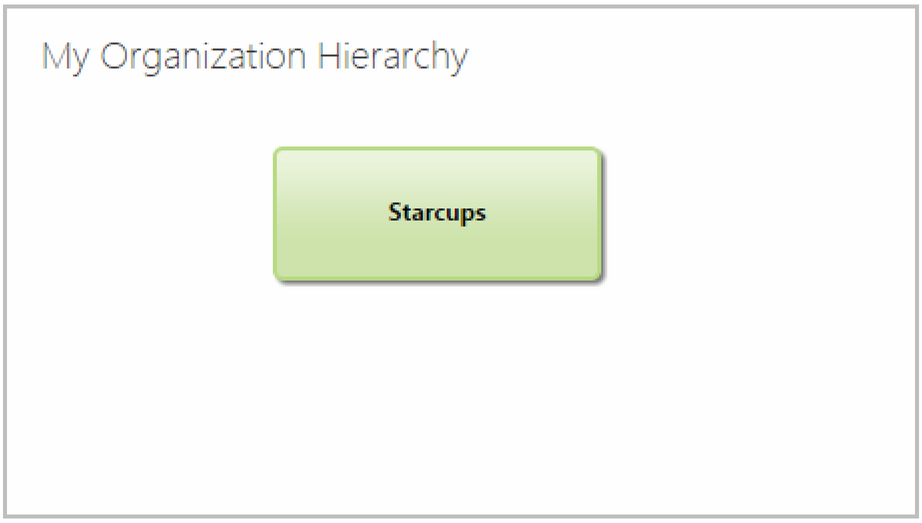
For example, in the above Organization Assistant 2 sees only two clickable links: his own name and l2, all other names are not clickable for him:



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



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



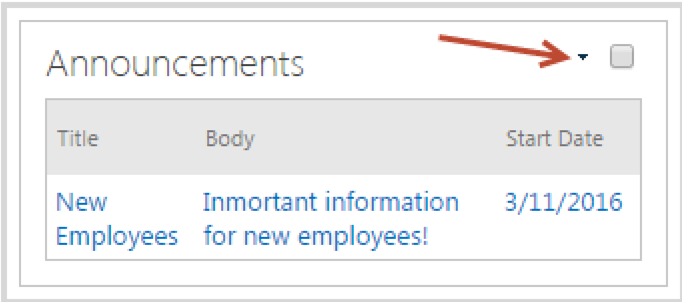
NOTE:	If SharePoint CCM was updated from an older version in which Home Page was modified, 'My Organization Hierarchy' web part may not be added to the Home Page automatically. In this case add it manually: 1. Go to the Home Page edit mode; 2. Select Insert > Web Part in the ribbon menu; 3. Find "My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

3.2 Manage Web Parts

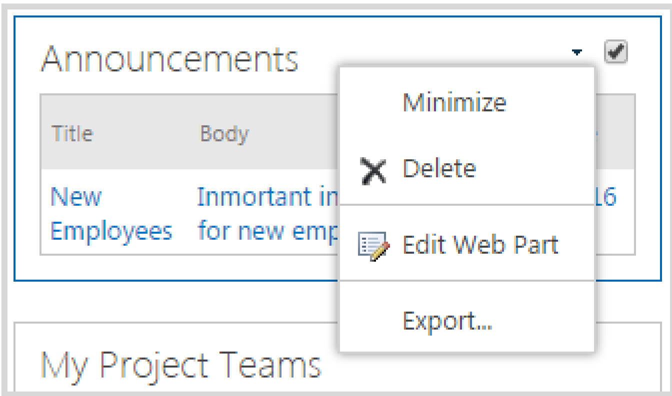
When users change pages and controls, it is possible to save settings for the user's personal preferences to display the future browser sessions in the way considered before.

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.

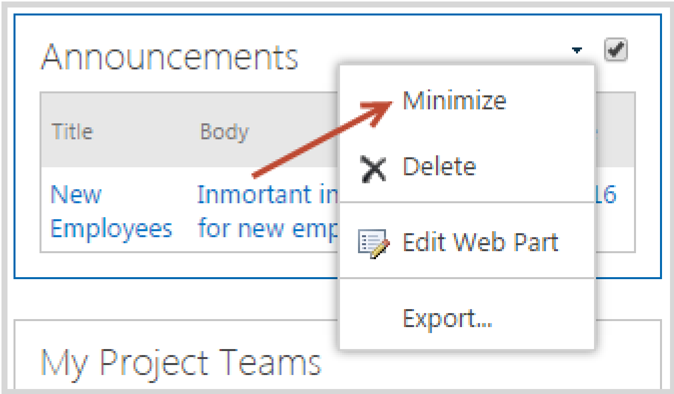
3.2.1 Minimize Web Part

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

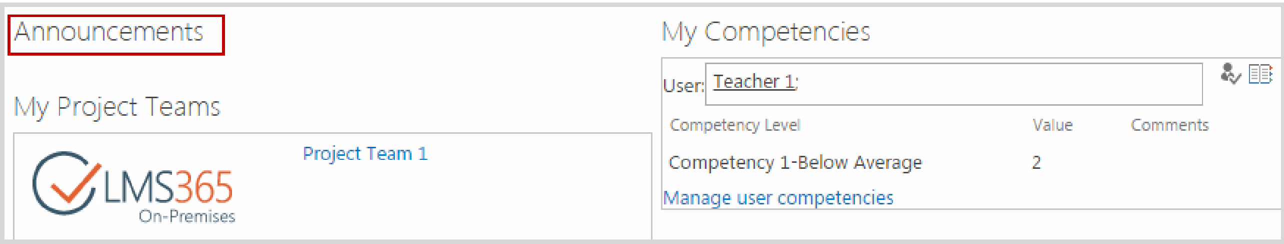
To minimize the chosen web part, follow the steps given below:

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:



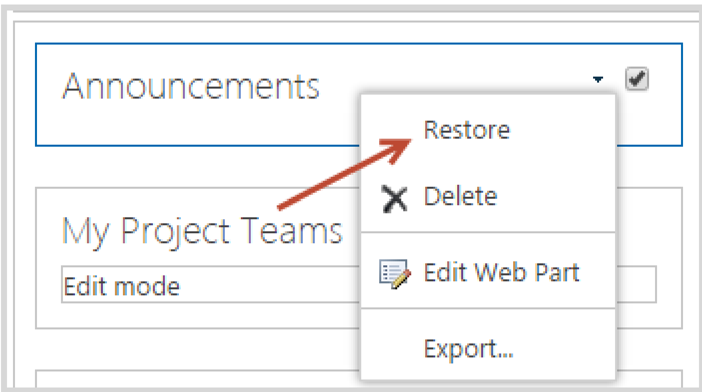
4) Once you have done it, the Web Part's layout will be minimized:



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:

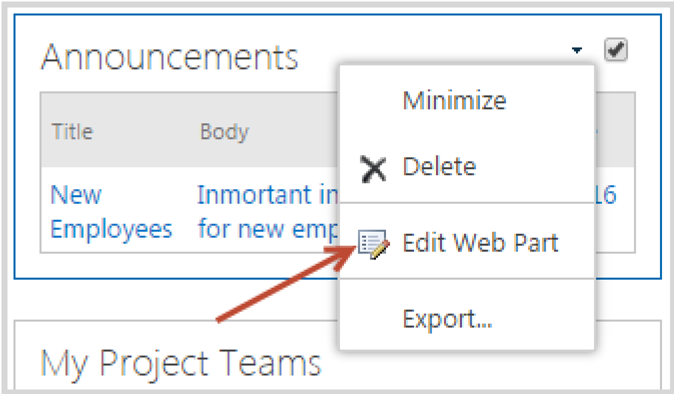


3) The web part will be expanded to display its content.

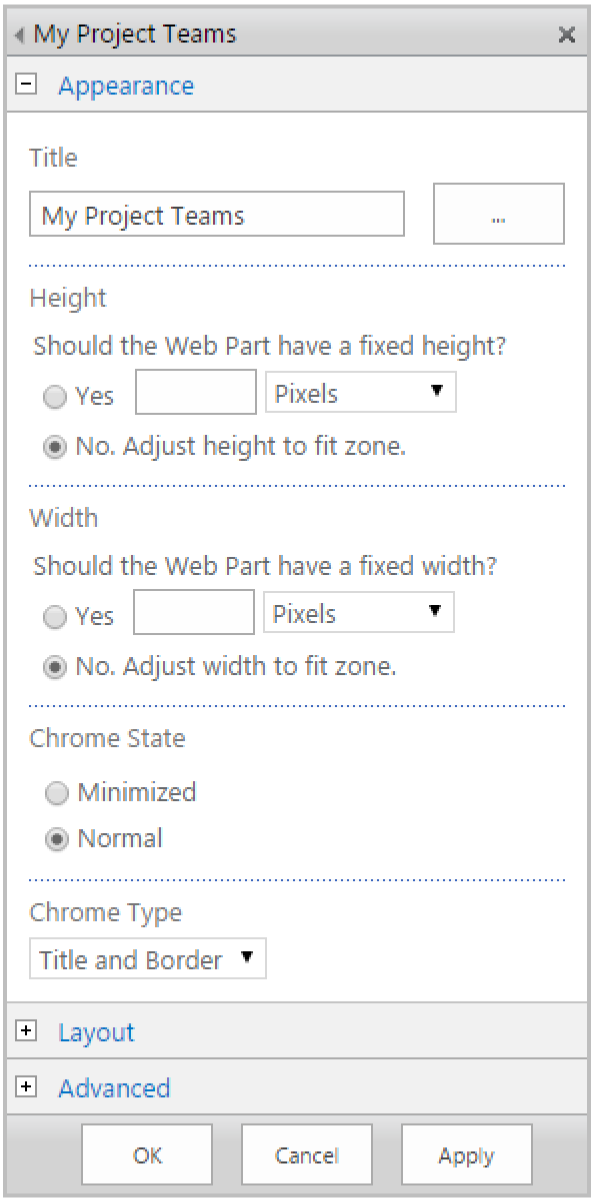
3.2.3 Edit Web Part

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.

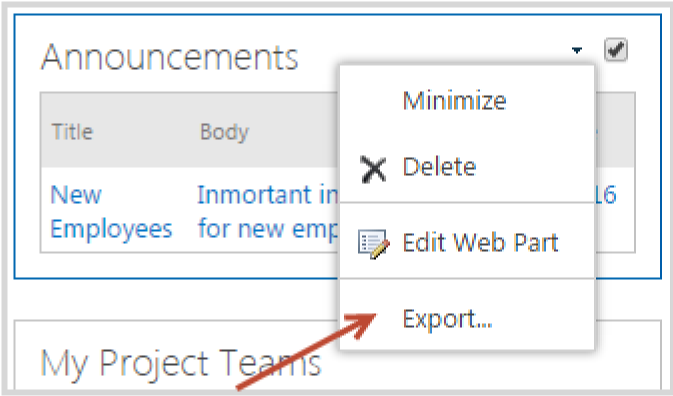
NOTE:	The best performance and the maximum functionality of working with SharePoint and integrated the Web Parts can be reached using the Internet Explorer browser.

3.2.4 Export Web Part to PC

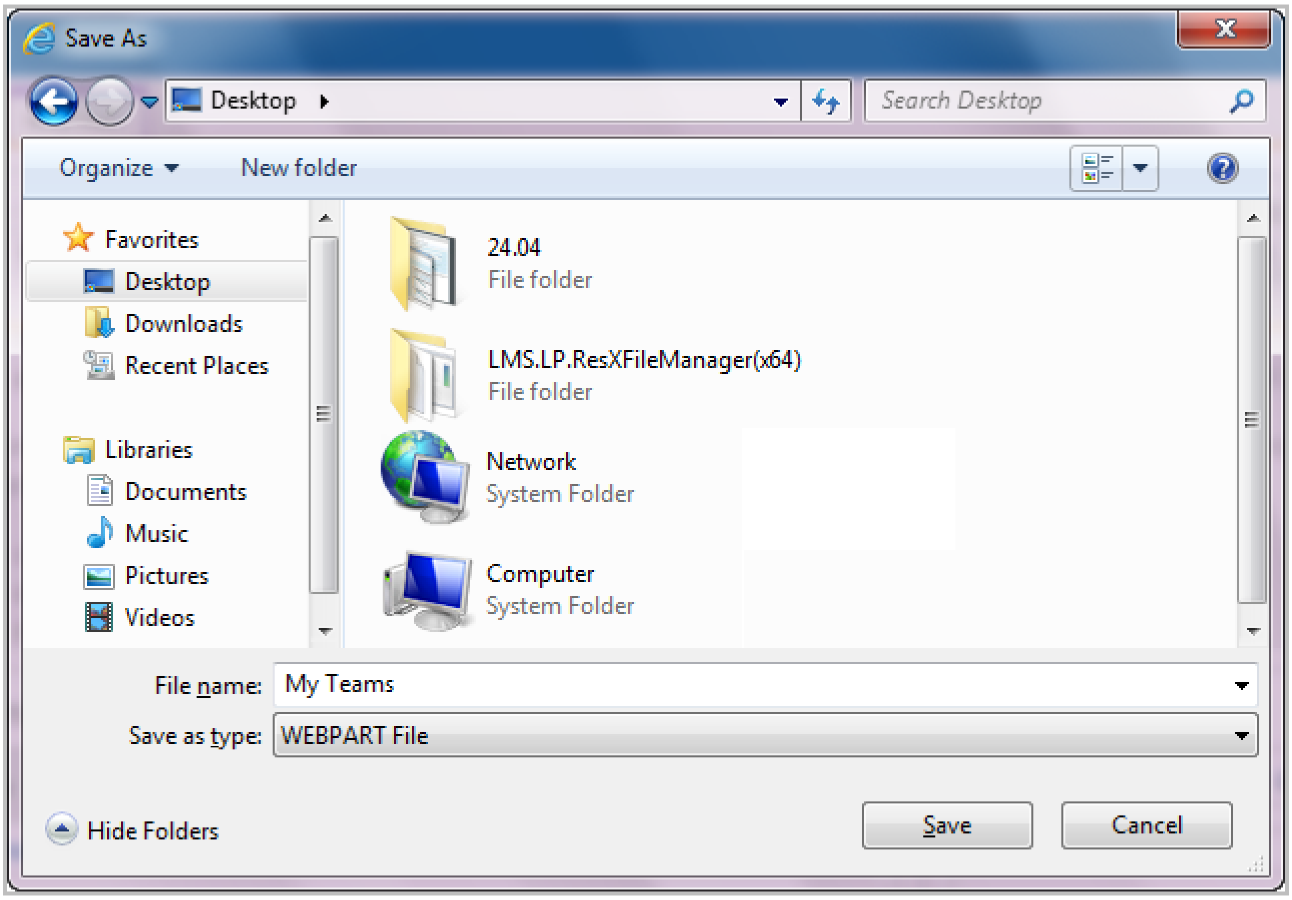
To export the web parts to your personal computer, follow these steps:

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:

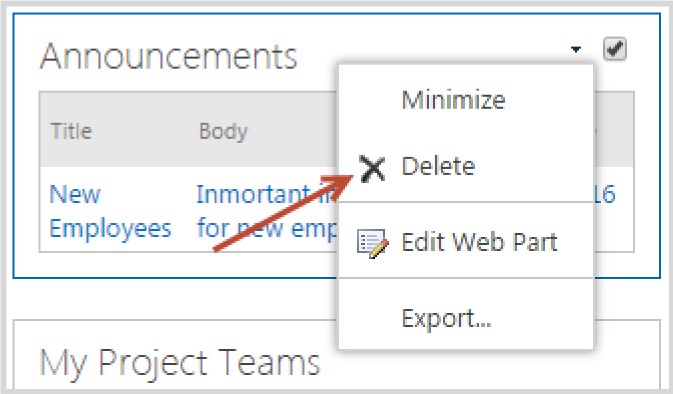


5) Click Save to save the web part on your personal computer.

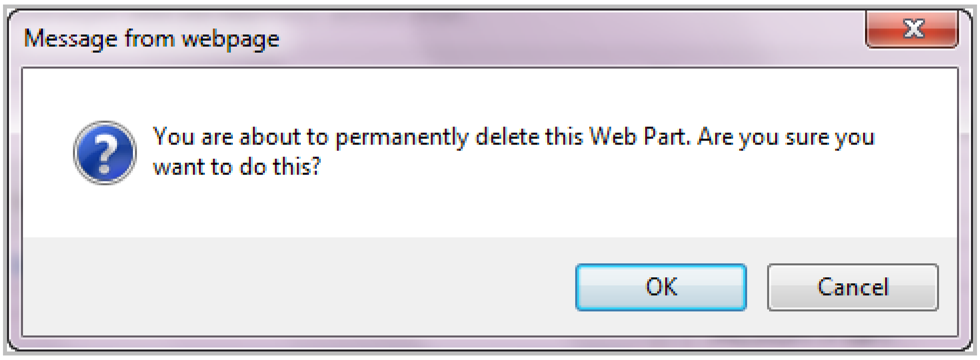
3.2.5 Delete Web Part

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:

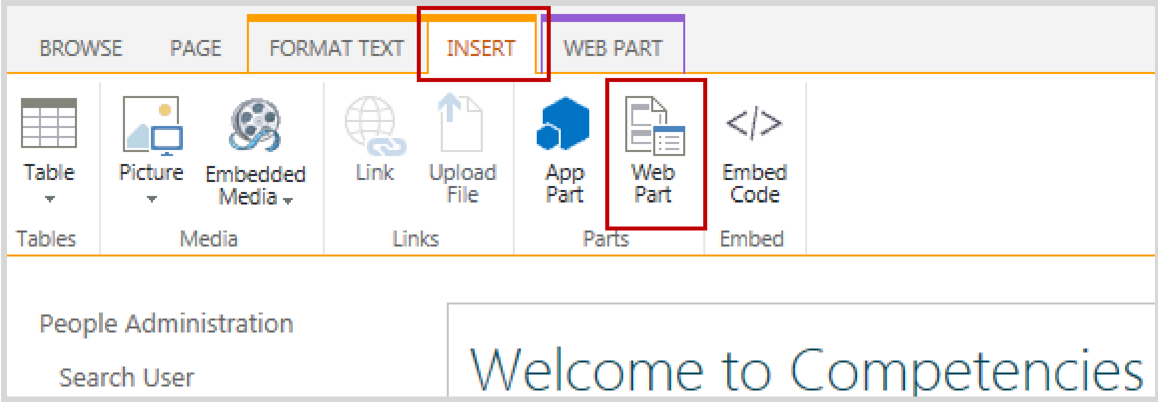


3) Click OK to delete the web part permanently, click Cancel to discard the changes.

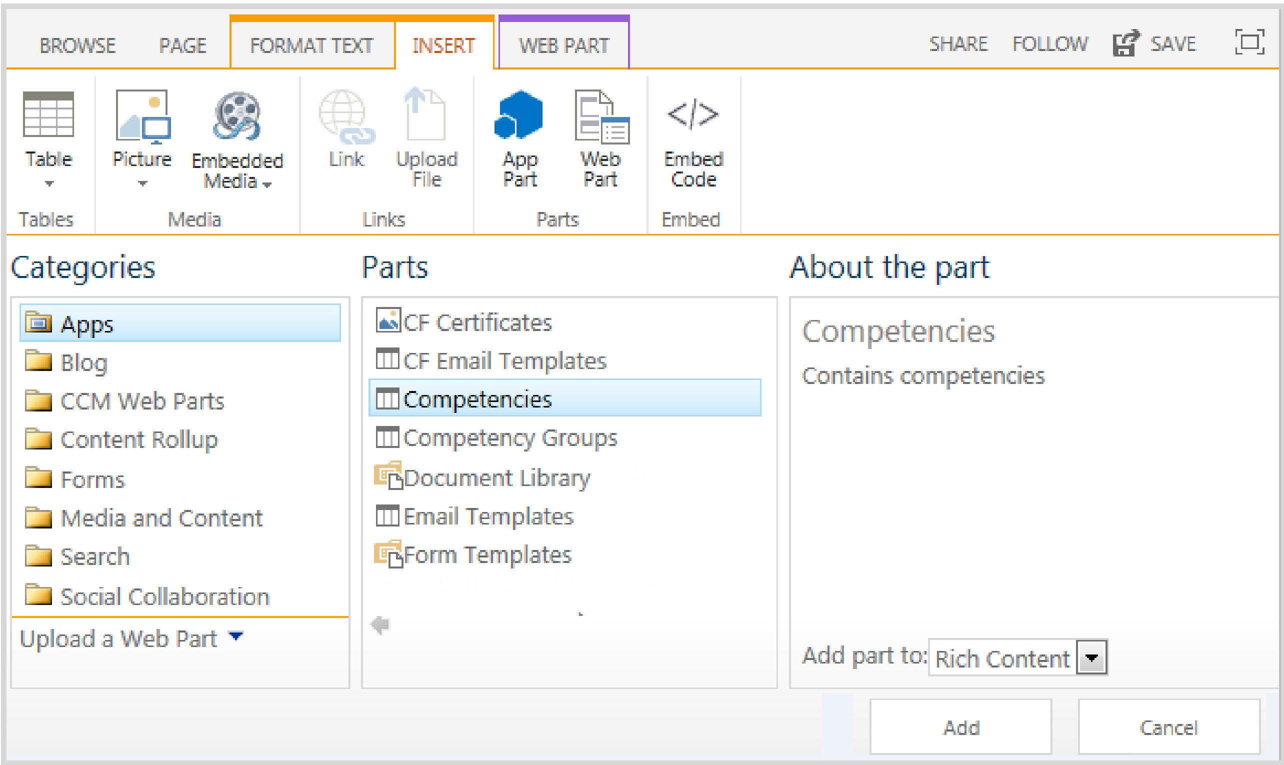
3.2.6 Add a Web Part

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:



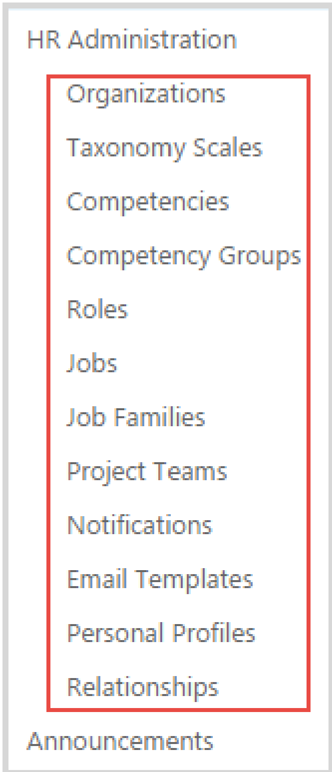
– The Categories section contains categories of Web Parts to you want to add:
– Web Parts section contains Web Parts from the category chosen in the 'Categories' section;
– About the Web Part section contains description of the Web Part chosen in the Web Parts section.

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.

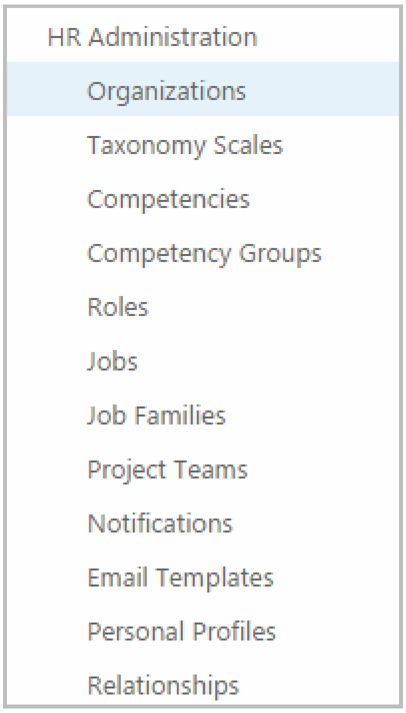
4.1 Organizations

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.

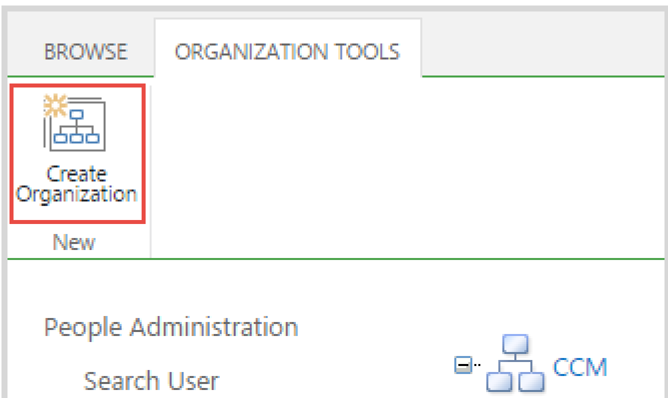
4.1.1 Add Organization

To create a new Organization, follow these steps:

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

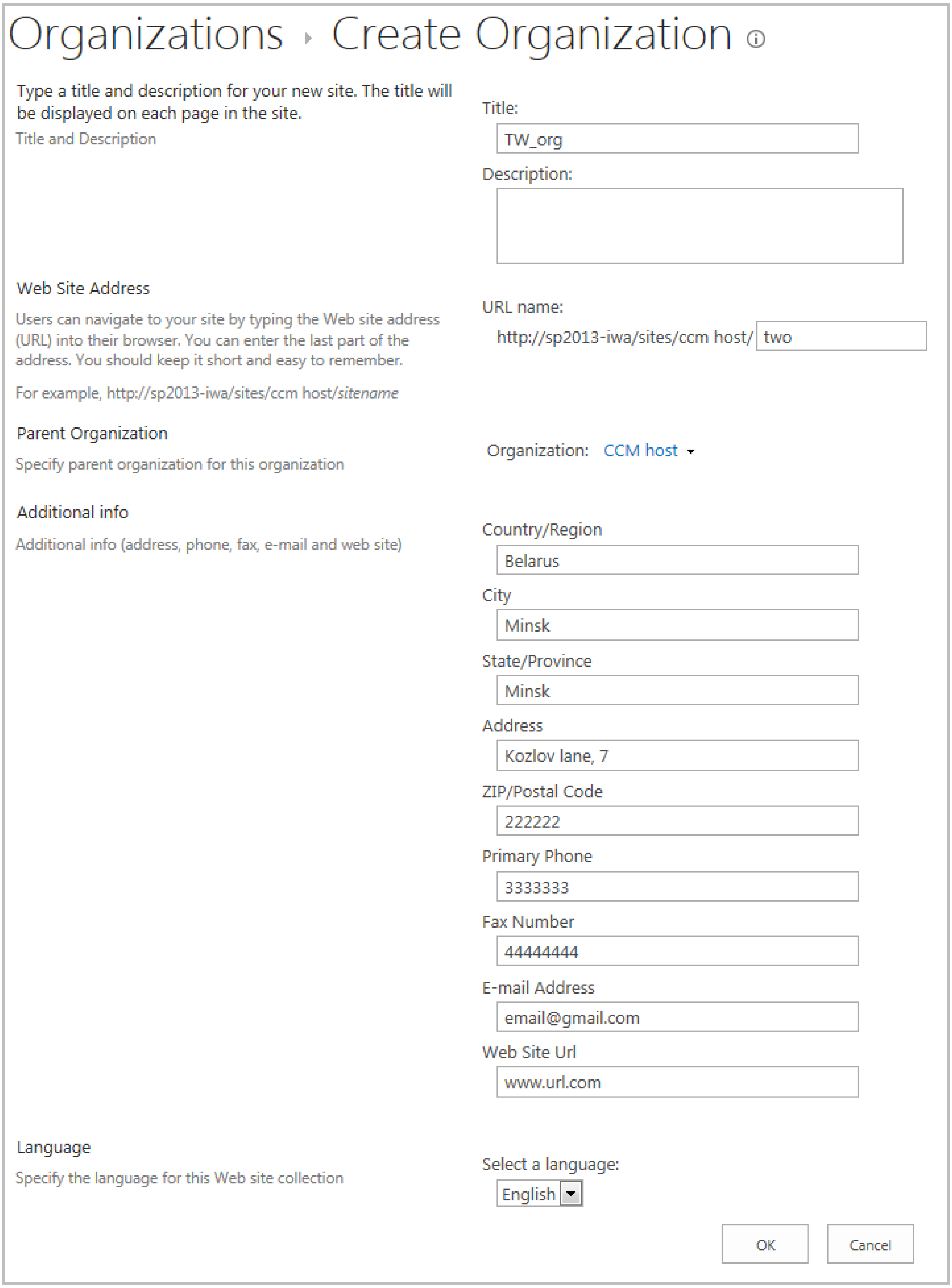


2) In the ribbon menu Organization Tools click Create Organization icon:



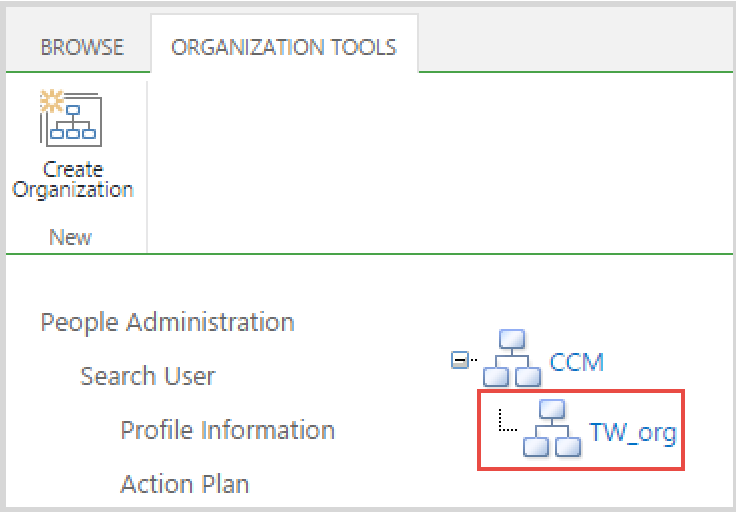
3) Fill out the form:
    a. Title – enter the name for this Organization. It will be displayed on each page within the site;

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:



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

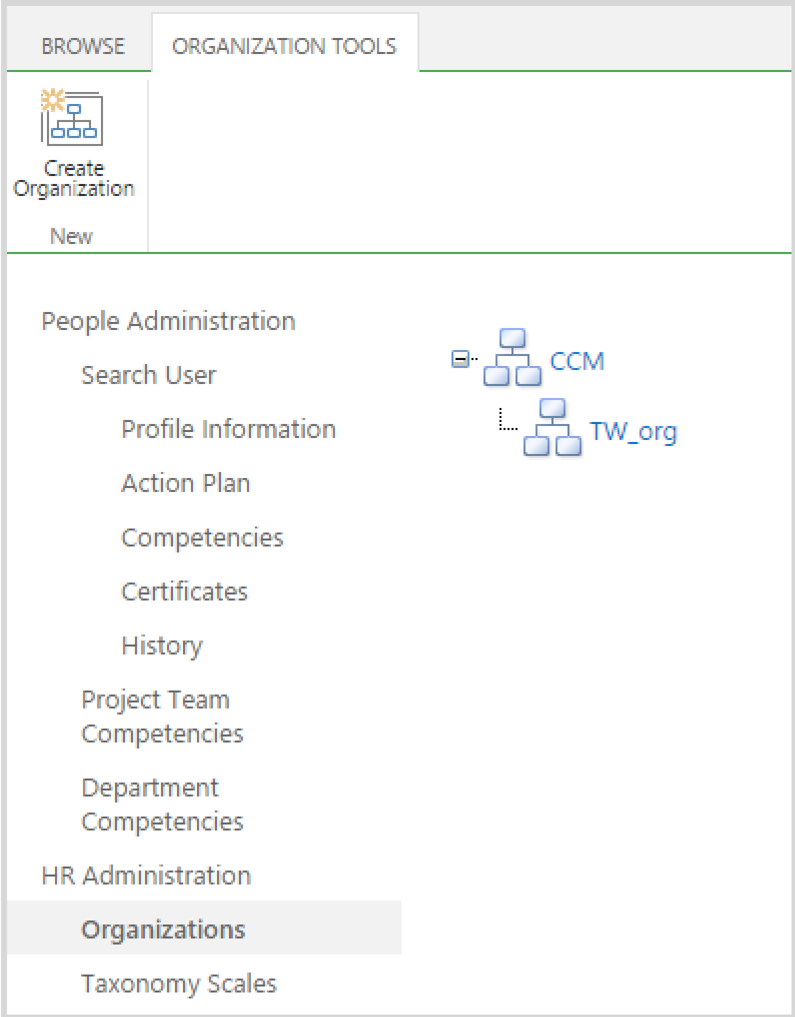
The Global Administrator will be redirected back to the Organizations page, where newly added Organization will be displayed within the Organizational Structure:



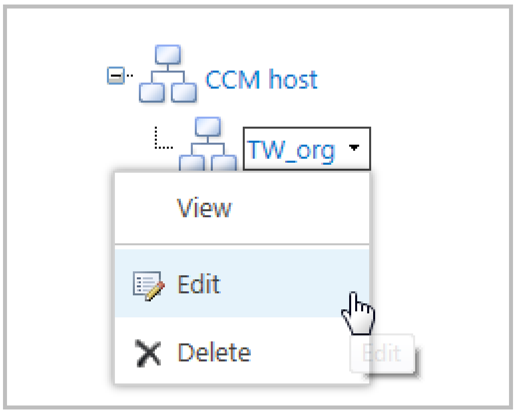
4.1.2 Edit Organization

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

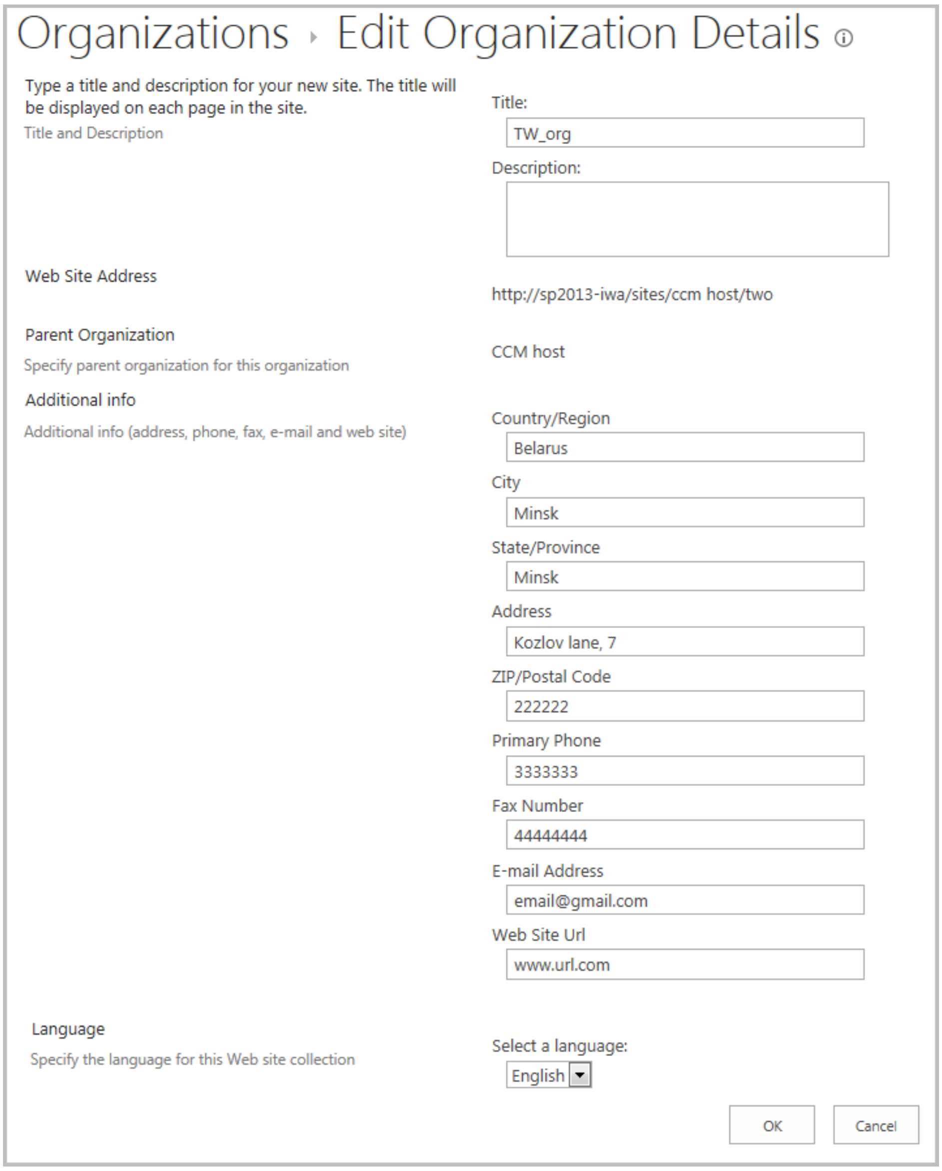
1) On the SharePoint CCM Host Home page click Organizations link. You will be redirected to the Organizations page, where all the Organizations are displayed in a tree-like structure:



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 Adress and Web Site URL):



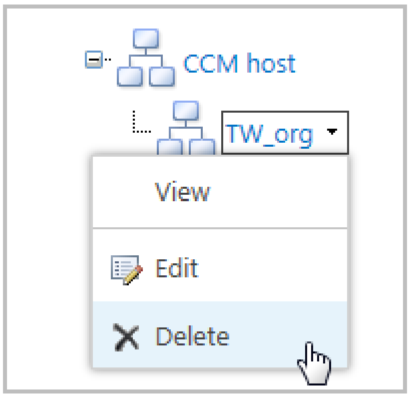
4) Click OK button to save the updates made OR click Cancel to discard the process.

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

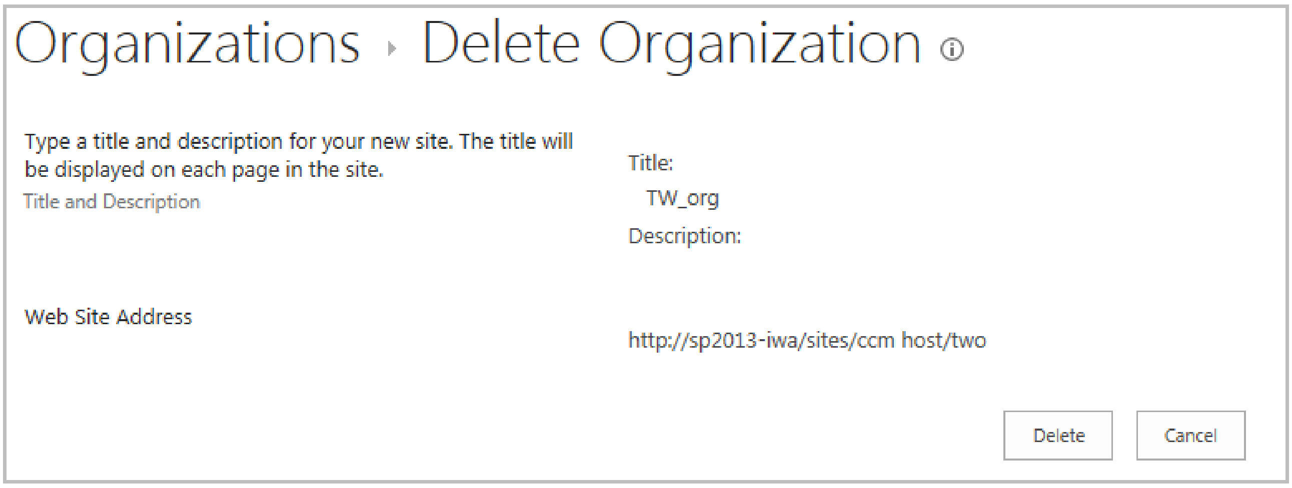
4.1.3 Delete Organization

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:

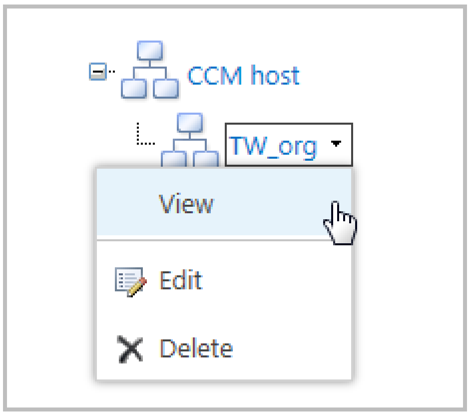


3) Click Delete button to remove the Organization from the Organizational Structure. Click Cancel button to discard the changes.

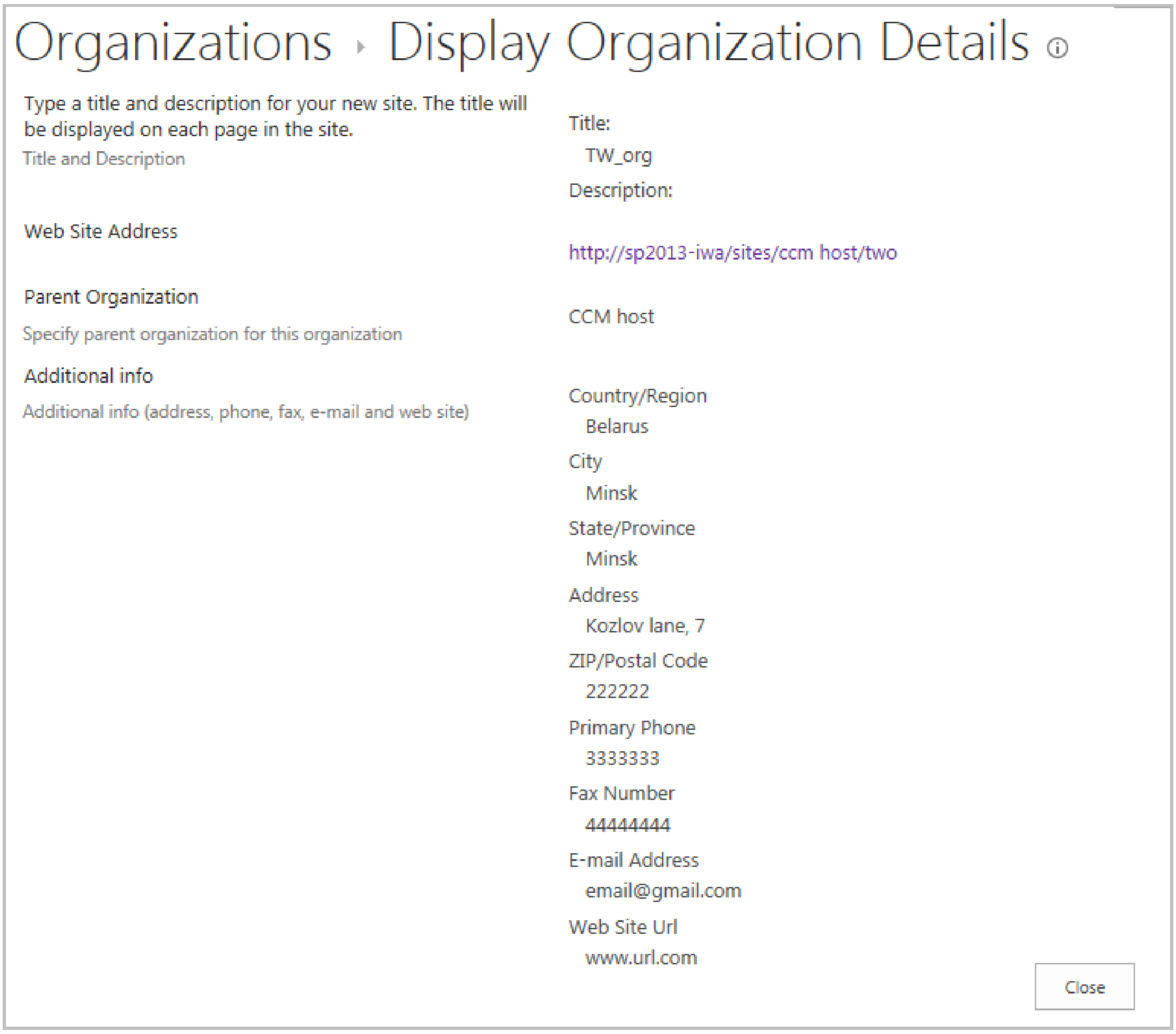
4.1.4 View Organization Details

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:



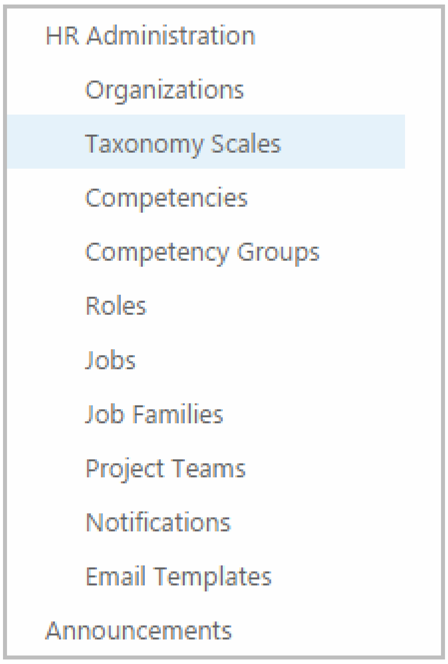
3) Click Close to shut down the form.

The system will redirect you back to the Organizations page.

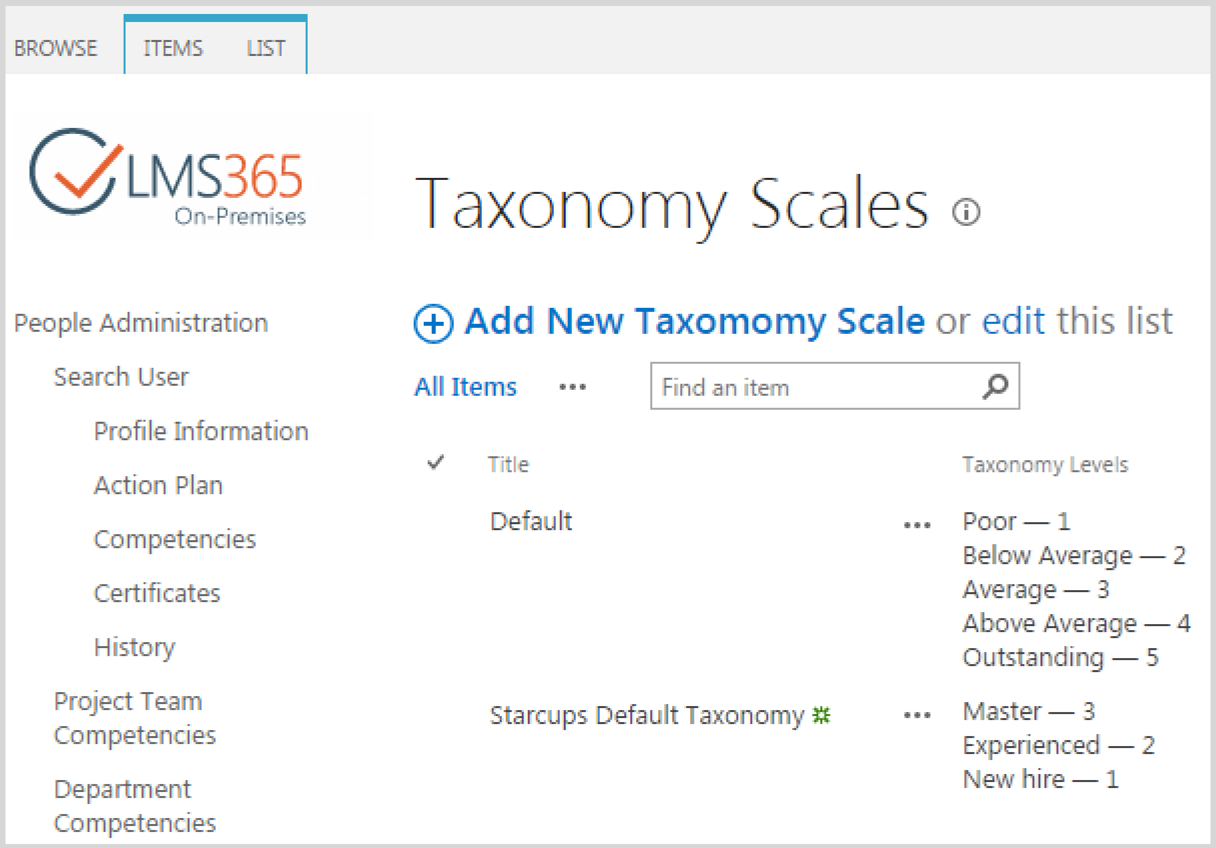
4.2 Taxonomy Scales

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:



4.2.1 Add Taxonomy Scale Template

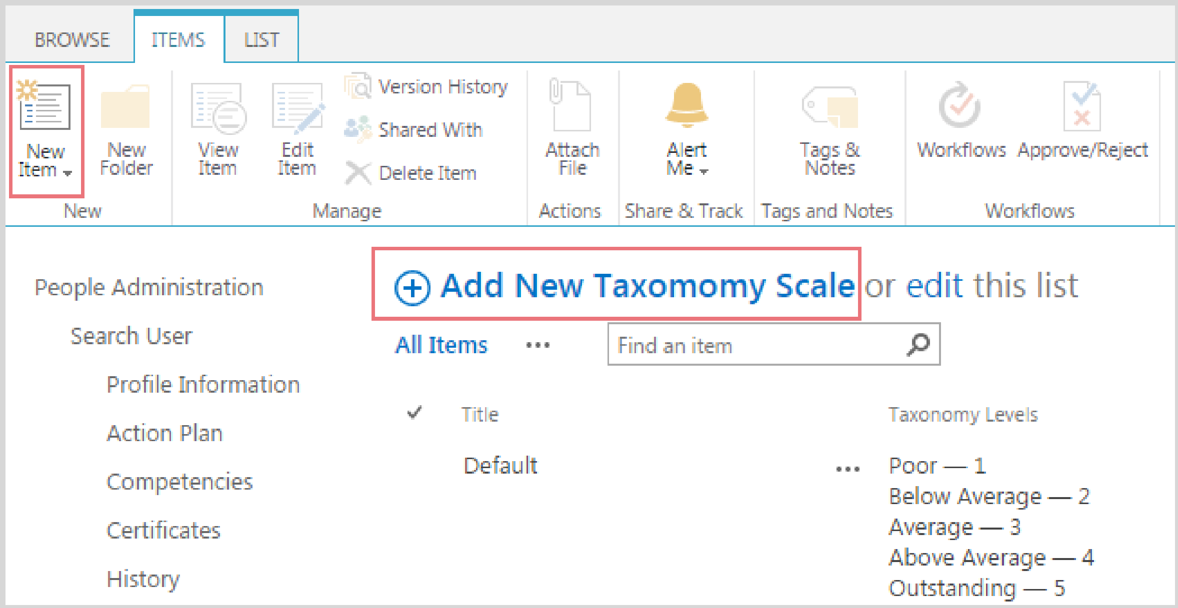
To add new Taxonomy Scale Template, Global Administrator follows the steps below:

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

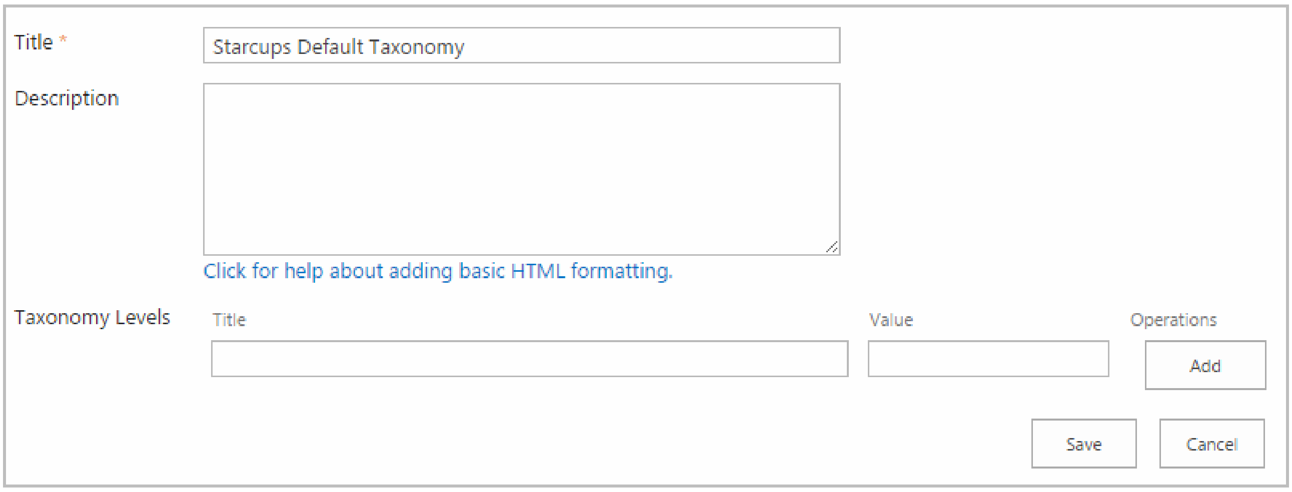
    a. Click Add New Taxonomy Scale button ;

        OR

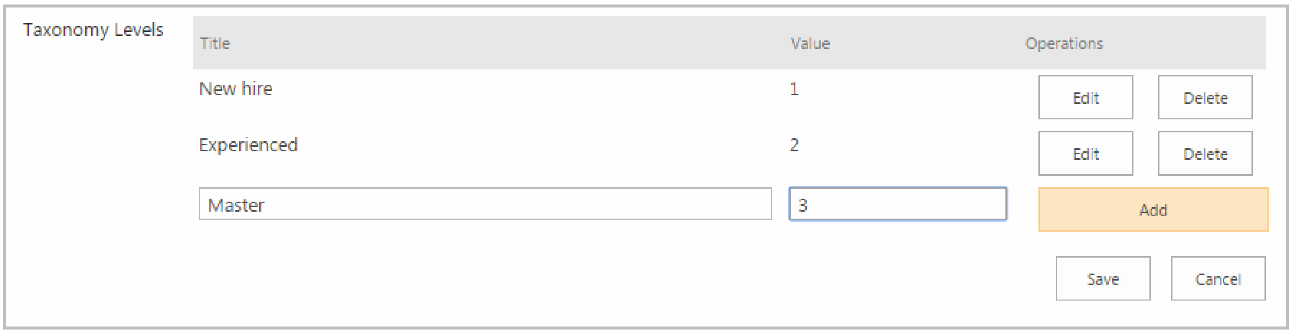
    b. On the ribbon go to Items > New Item:



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:

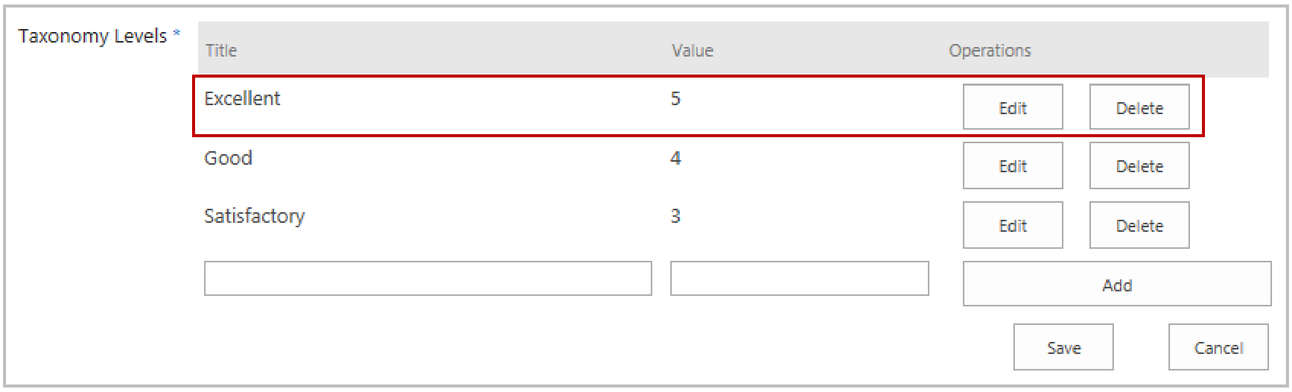


   c. Define the Taxonomy Levels for the new Taxonomy Scale Template and click Add button to add the Taxonomy Level and its Value to the Taxonomy Scale:

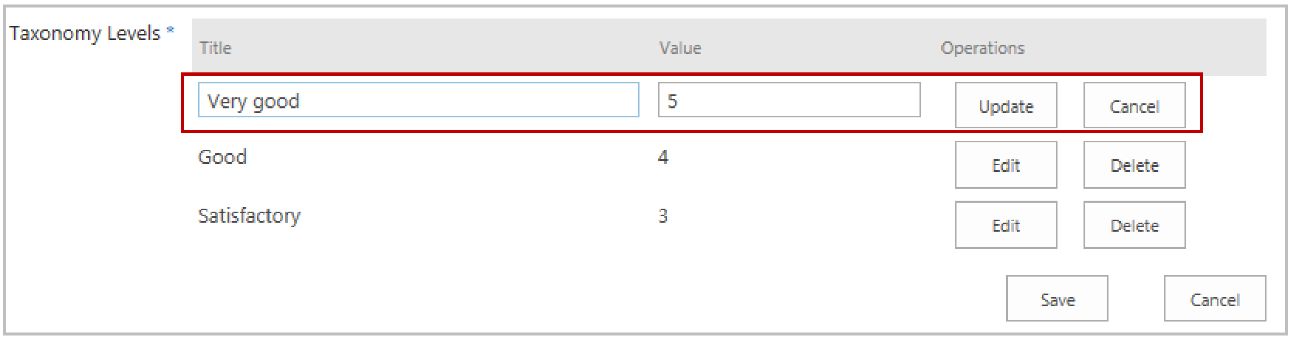


- Title – enter name for the Taxonomy Level;
- Value – enter the value for the Taxonomy Level.

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

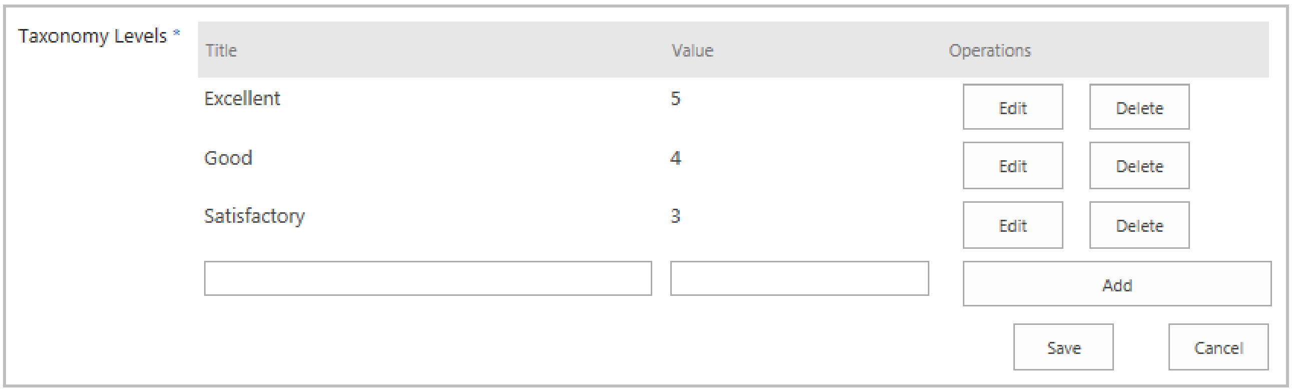


– Click Edit button to modify the Taxonomy Level's metadata:

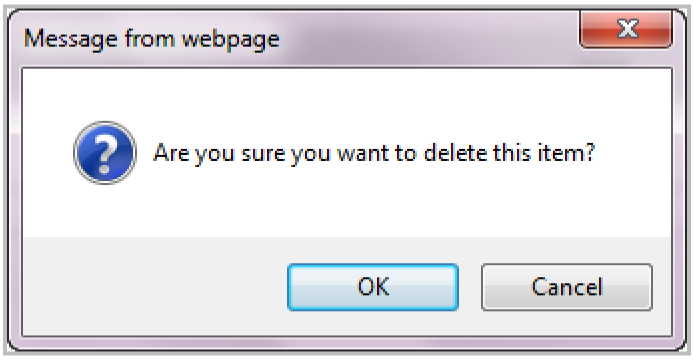


Make the necessary change to the taxonomy level's Title and/or Value and click Update button to save the changes or Cancel button to discard the process.

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



– 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.

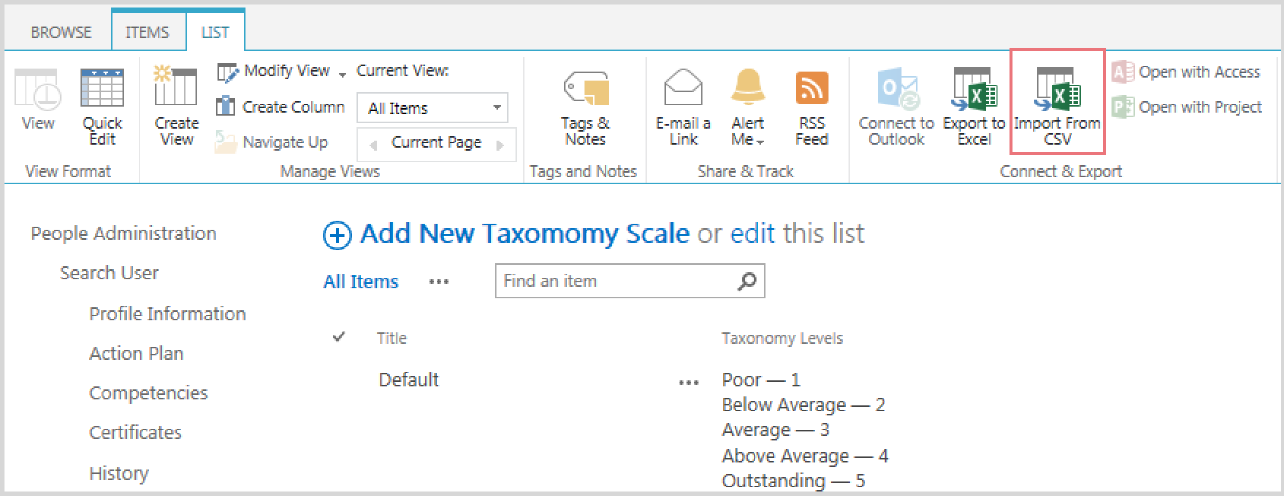
The user is redirected back to the Competency Groups list where newly added Competency Group is displayed.

4.2.2 Import Taxonomy Scale

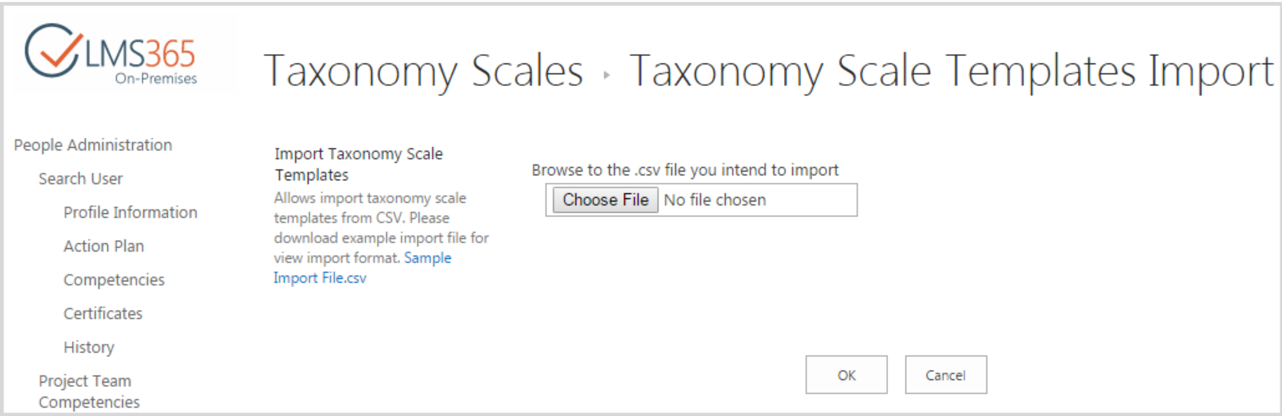
It is possible to import data from .csv file for the Taxonomy Scale item. The process of importing Taxonomy Scale is described below:

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:

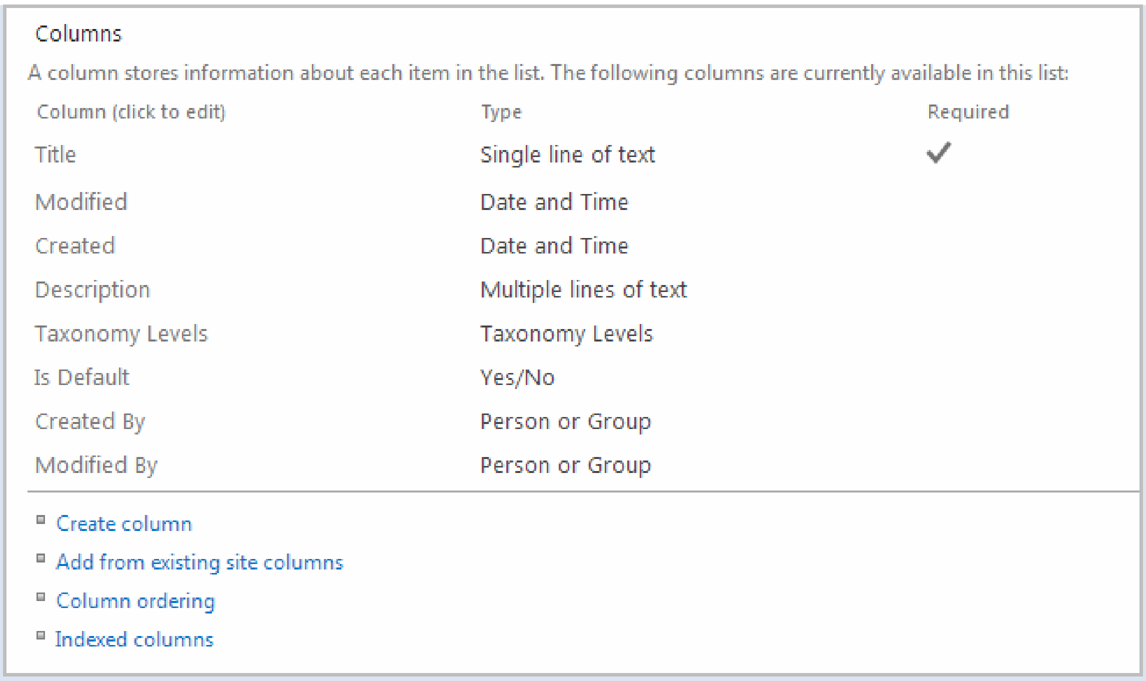
1) Enter the Taxonomy Scales list and click the Import from CSV button in the List Tools > List in the ribbon menu:



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 Taxonomy Scales > List > List Settings:



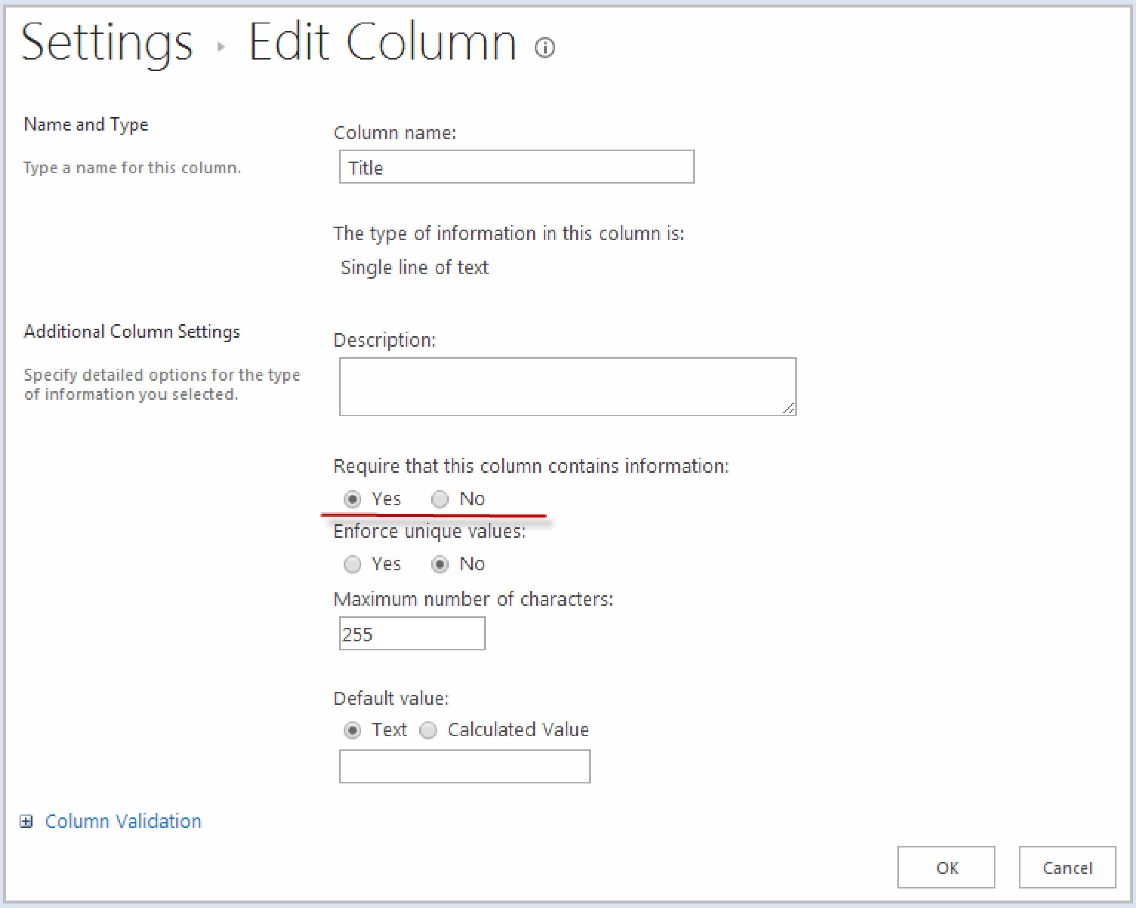
Columns

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

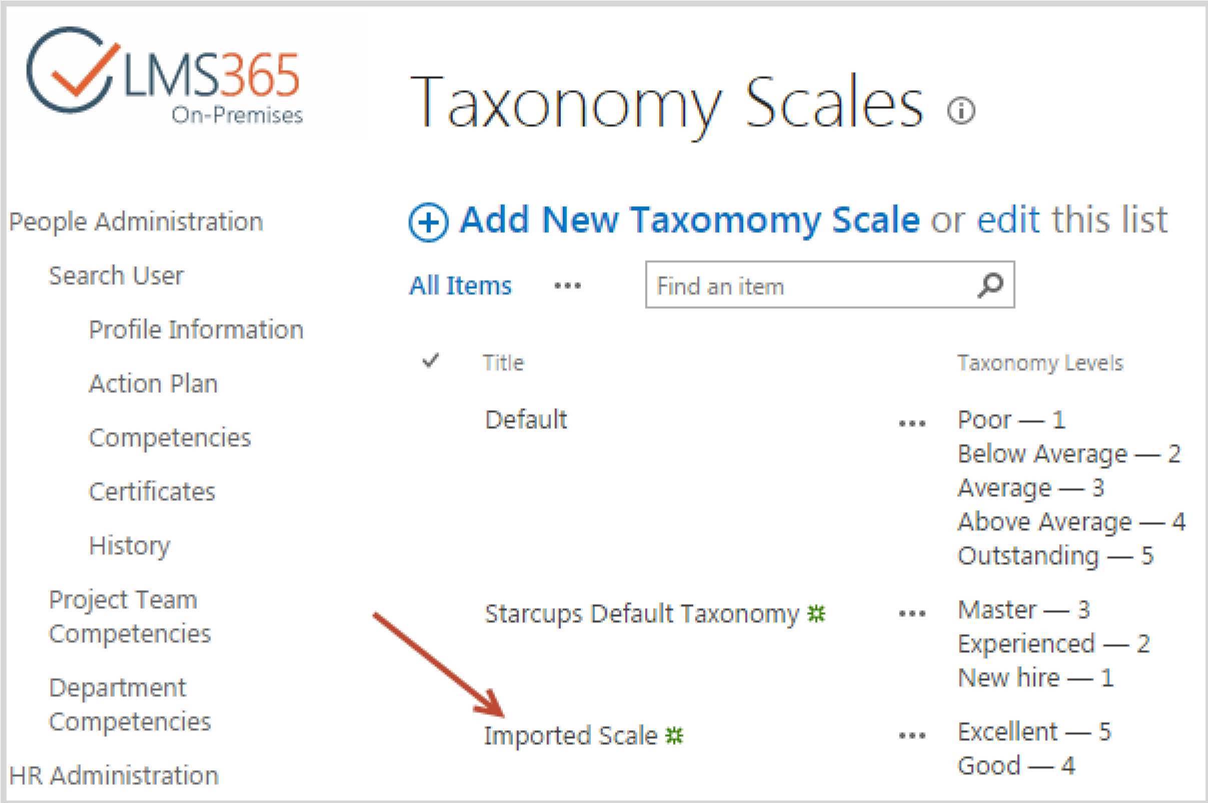
Column (click to edit)	Type	Required
Title	Single line of text	✓
Modified	Date and Time	
Created	Date and Time	
Description	Multiple lines of text	
Taxonomy Levels	Taxonomy Levels	
Is Default	Yes/No	
Created By	Person or Group	
Modified By	Person or Group	

- 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:



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.

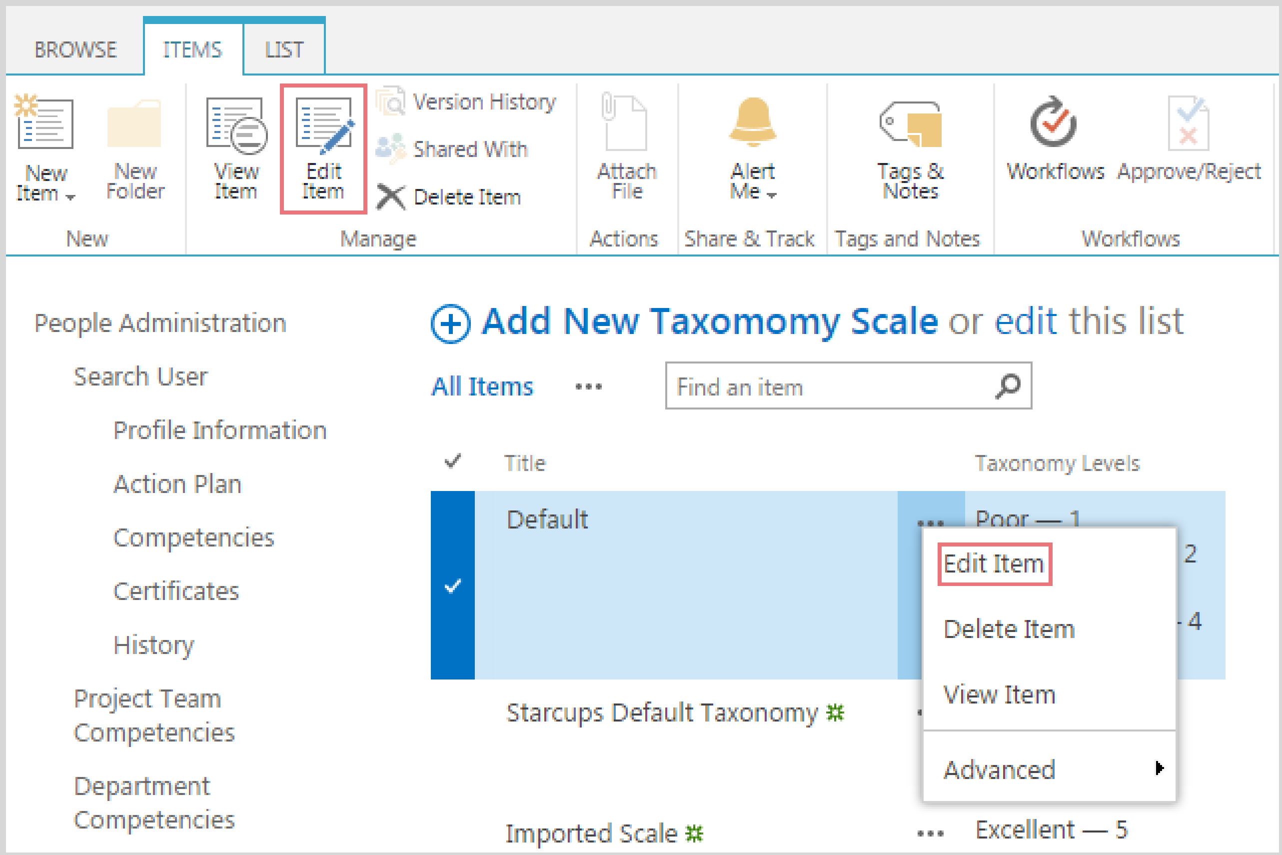
4.2.3 Edit Taxonomy Scale Template

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

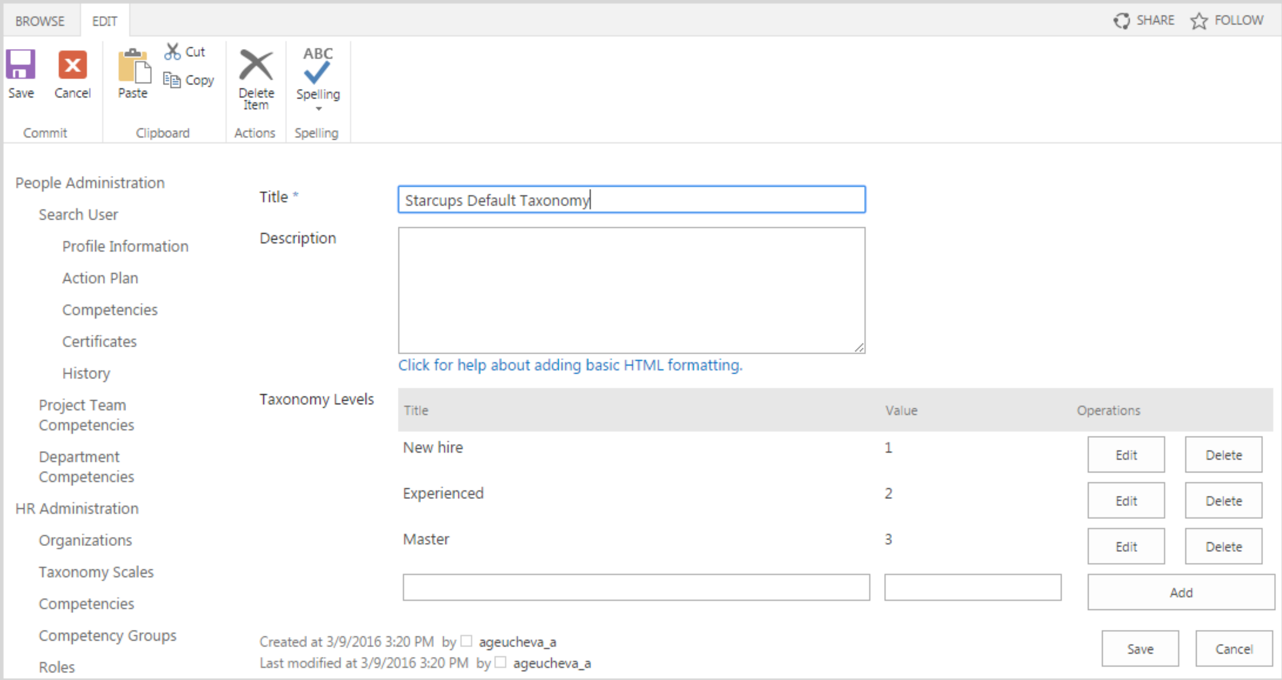
1) Open the Edit form via one of the ways described below:
    a. Click on the Taxonomy Scale Template's Title in the Taxonomy Scale Templates list to select it and from the ribbon choose Edit Item in the Items tab;

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:



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

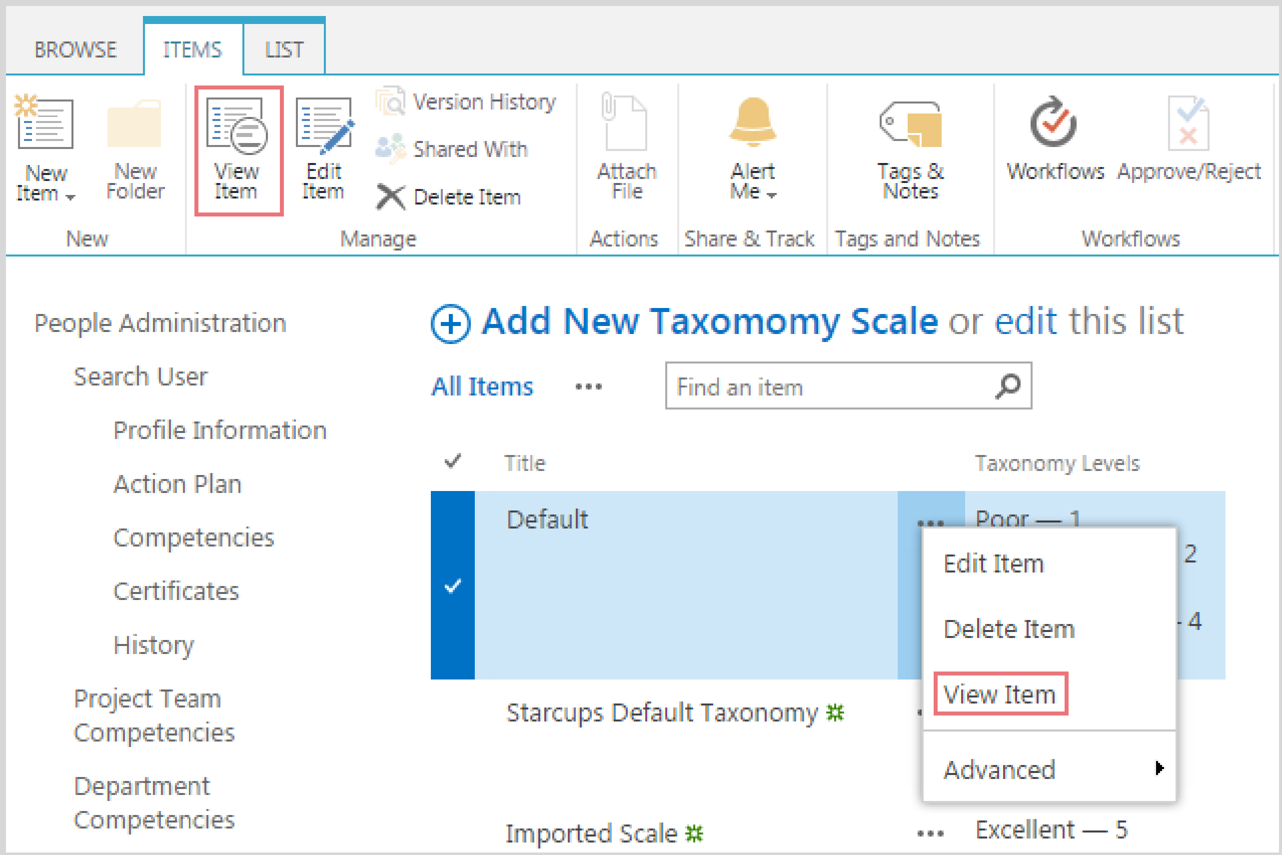
To see the details about the Taxonomy Scale Template, the user follows the steps below:

1) Open the Taxonomy Scale Template details form via one of the options described below:

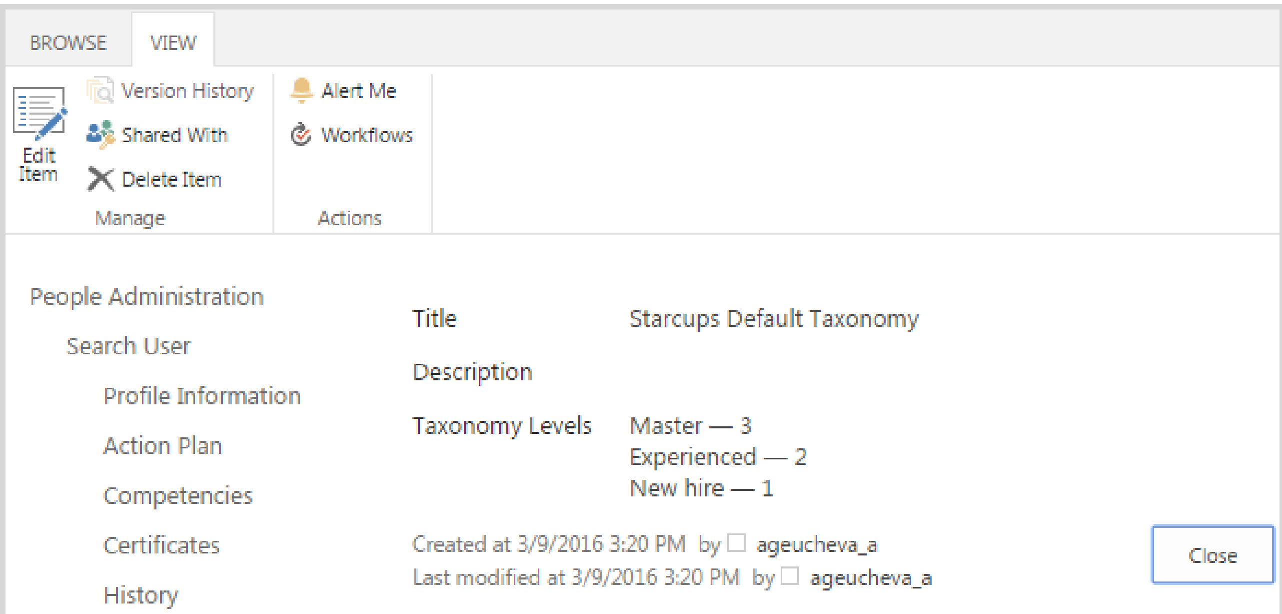
   a. From the drop-down action list next to the Taxonomy Scale Template's Title select View Item action;

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:



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



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

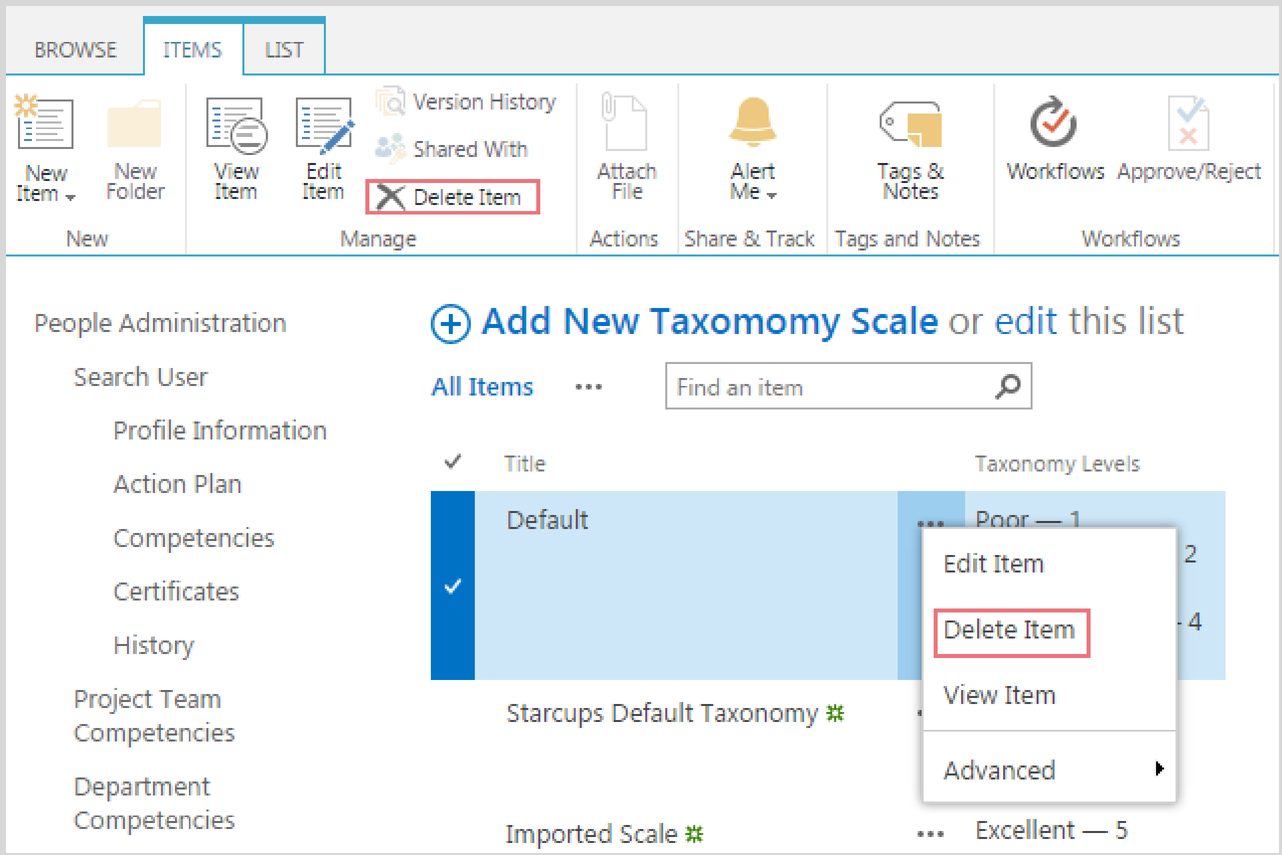
4.2.5 Delete Taxonomy Scale Template

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

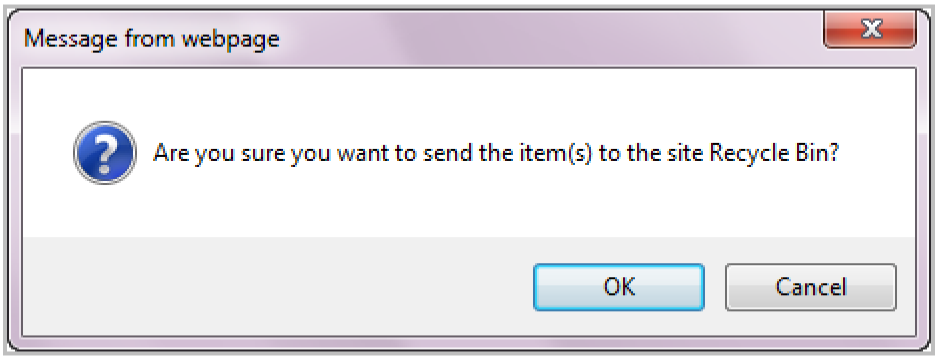
1) Click on the Taxonomy Scale Template in the Taxonomy Scale Templates list to select it and from the ribbon choose Delete Item in the Items tab;

OR

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

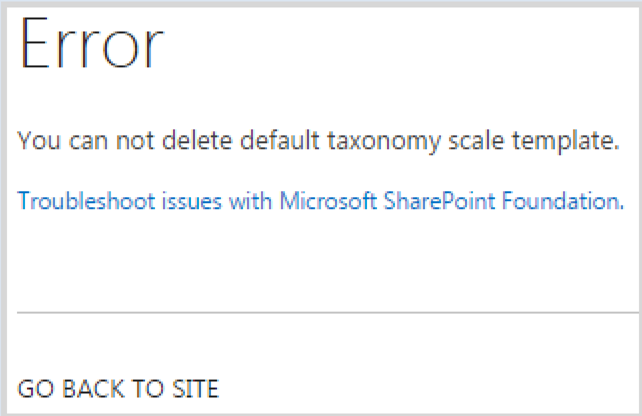


The system will display the message asking to confirm the decision to permanently remove the Taxonomy Scale Template:



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.

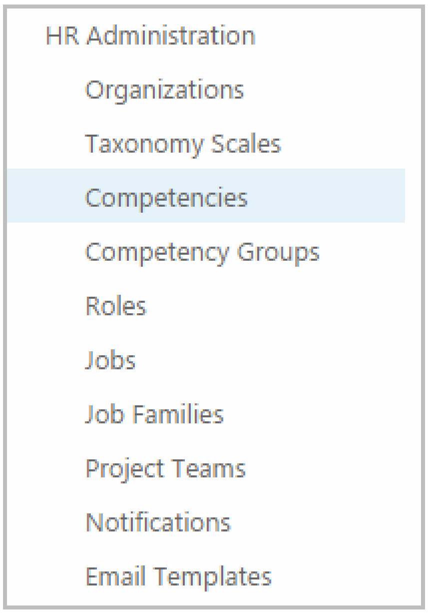
4.3 Competencies

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

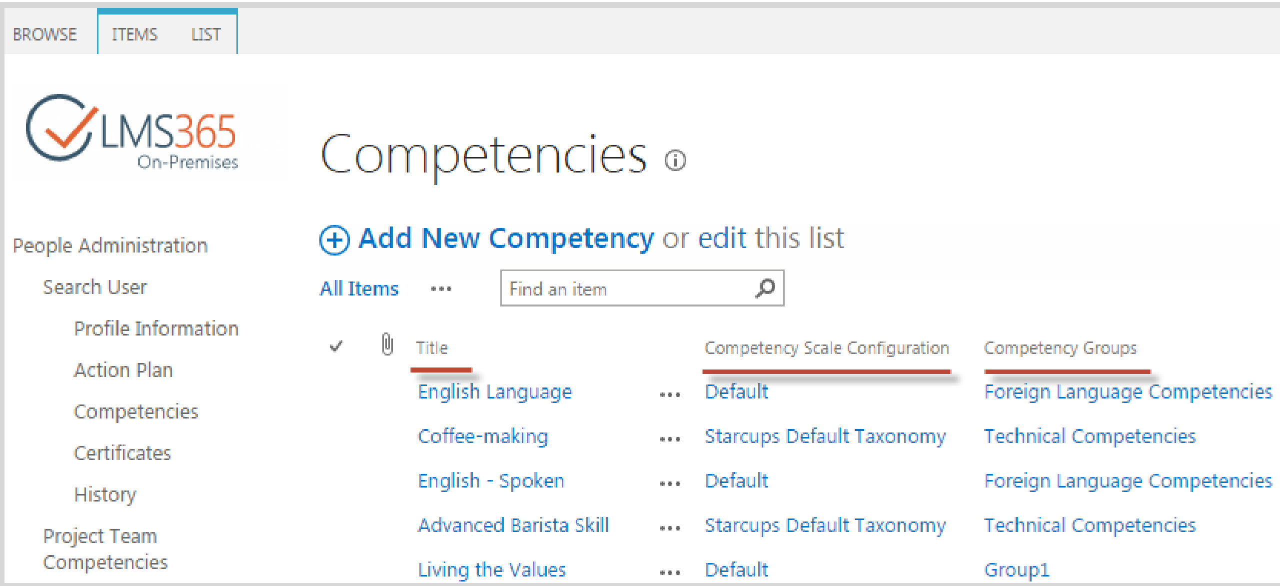
4.3.1 View Competencies list

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:

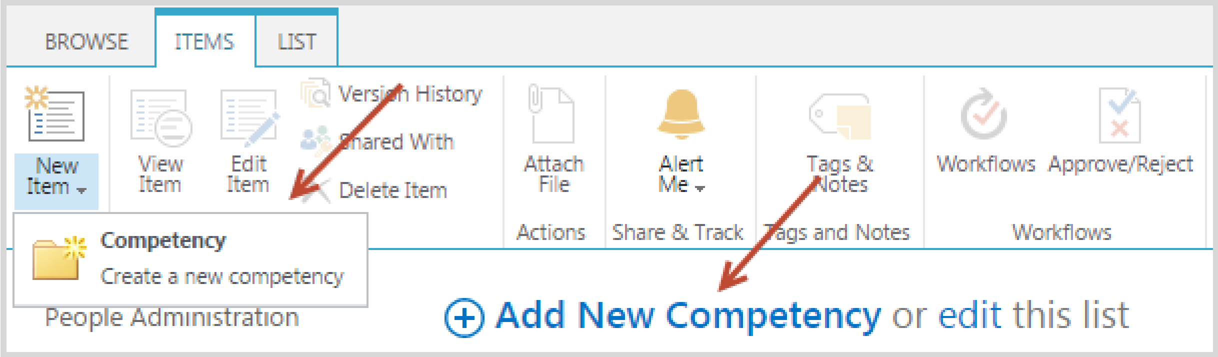


The Global Administrator is able to manage the Competencies from the Competencies List by adding new Competencies, updating or deleting the Competencies that are already in the list.

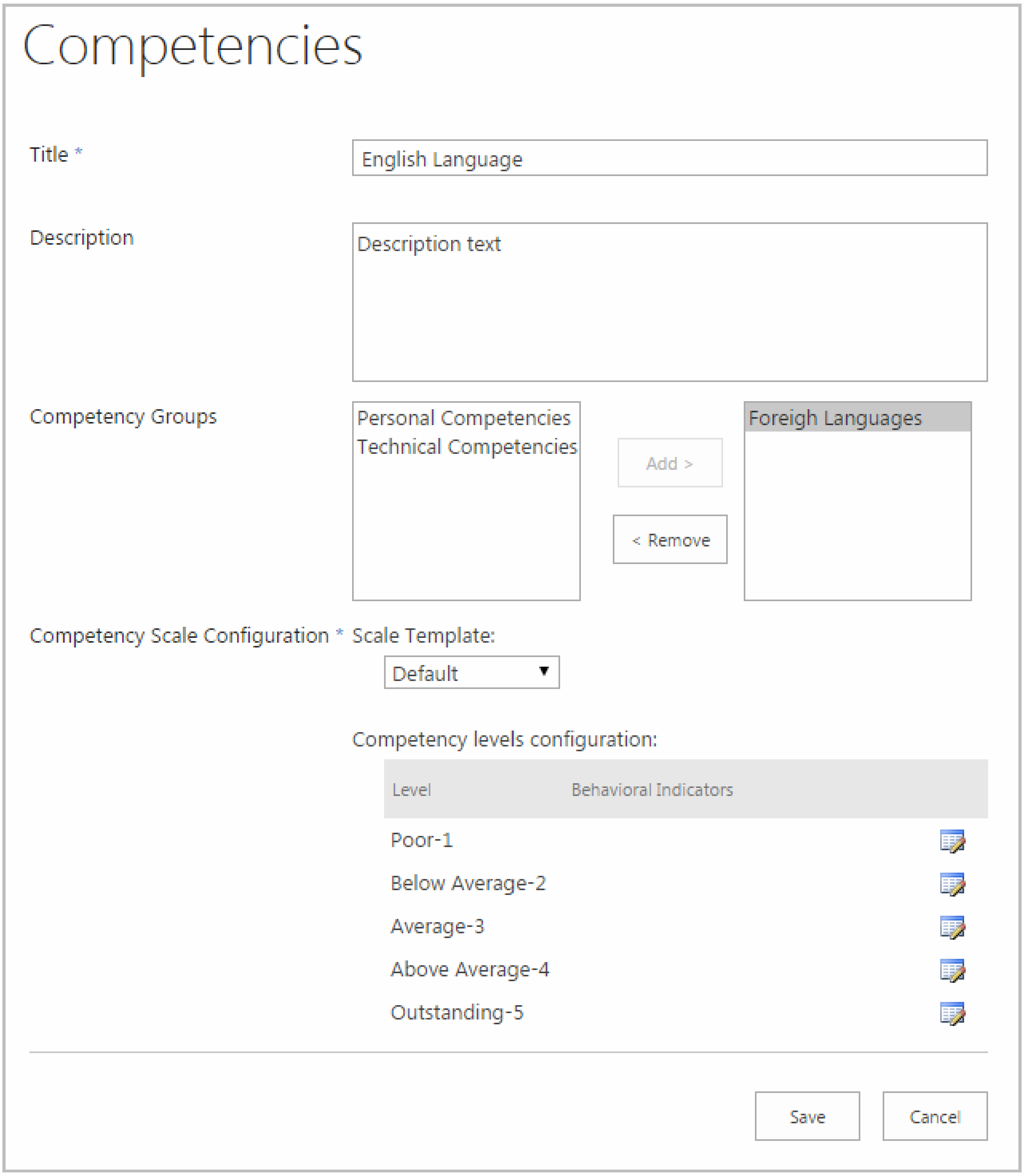
4.3.2 Add Competency

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 ⊕:

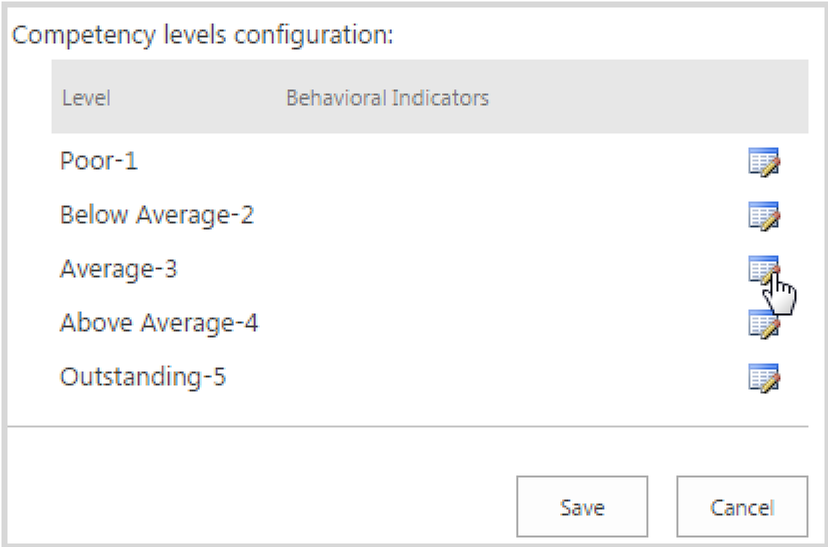


2) The system will open the Competency – New Item form:

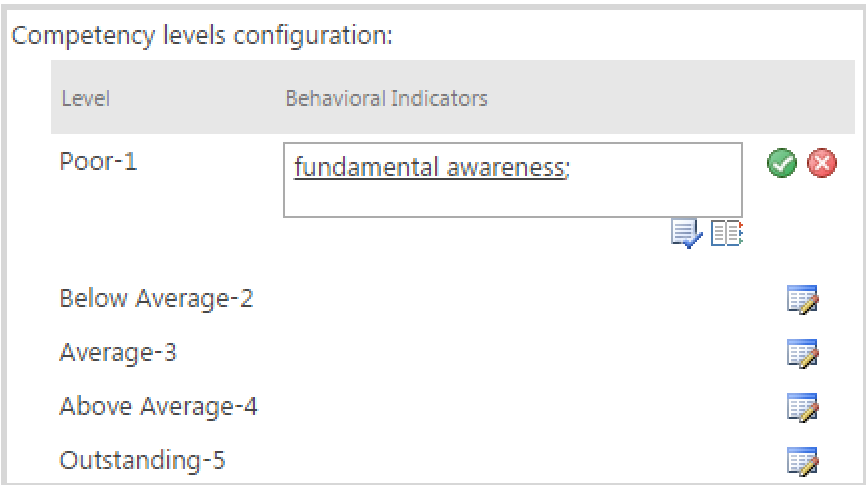


3) Enter the name and, optionally, description for the new Competency:
   - Title – the Name for the new Competency;
   - Description – the short description of the new Competency;
4) Select (optionally) one or more Competency Groups for the new Competency:
   - Competency Group – Competency group(s) 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:

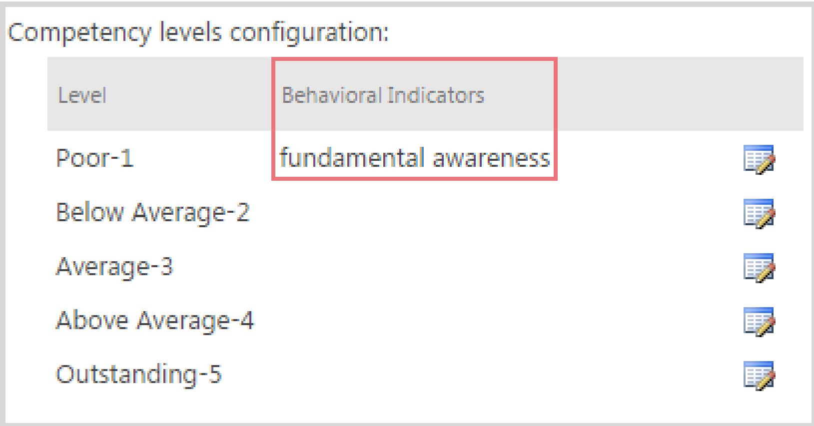


The Configuration form will appear. Here you can pick Behavioral Indicators to be attached to the current Competency level:



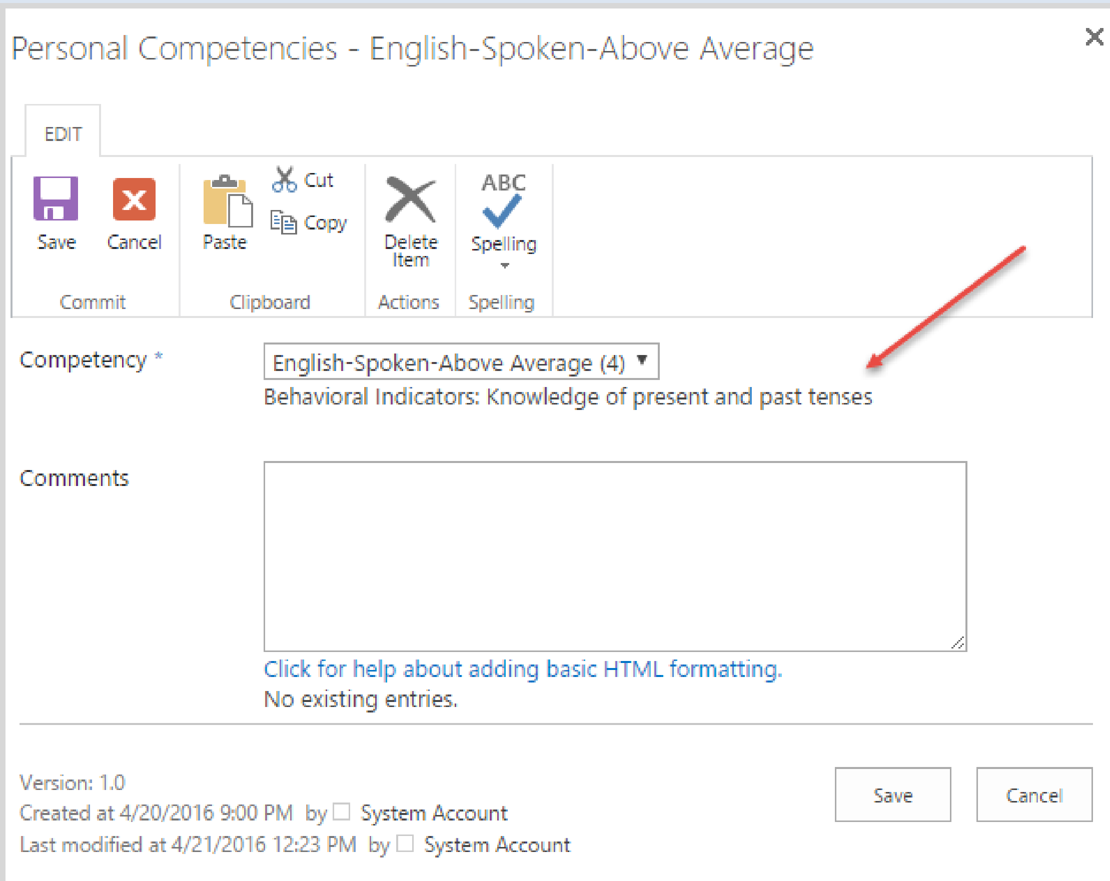
- Click the Browse ( ) icon to pick one or more Behavioral Indicators;
- Click Check Names ( ) icon to check, whether the name is correct and can be added;

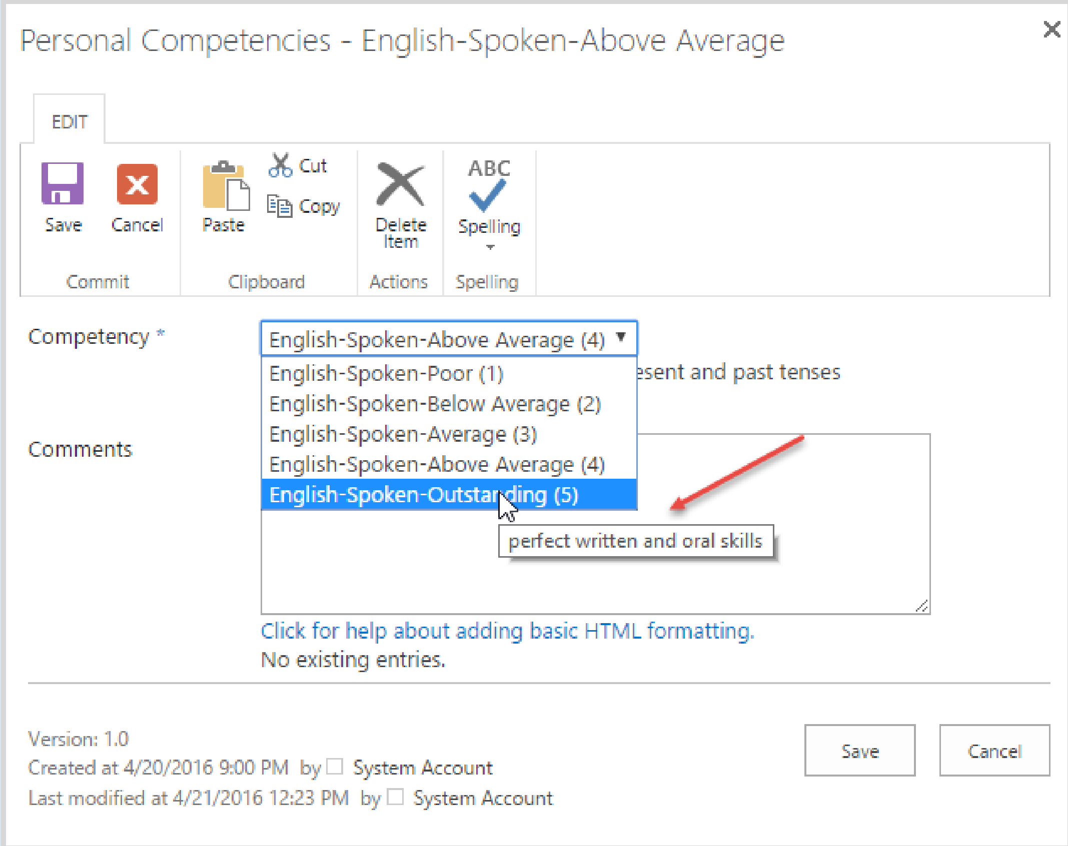
- Click ( ) icon to save the added Behavioral Indicators to the Level <u>OR</u> clicks ( ) icon to discard the changes:



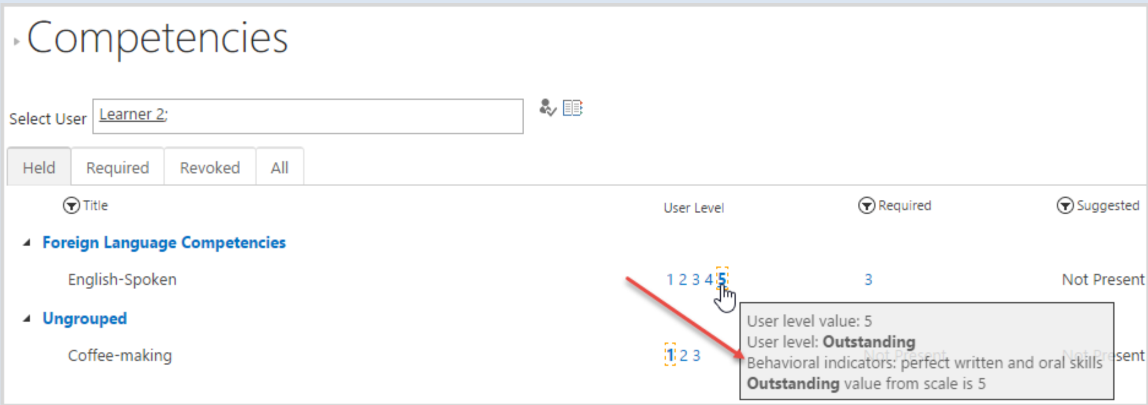
- Complete the procedure for each Competency Level in the selected Scale.

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):





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



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

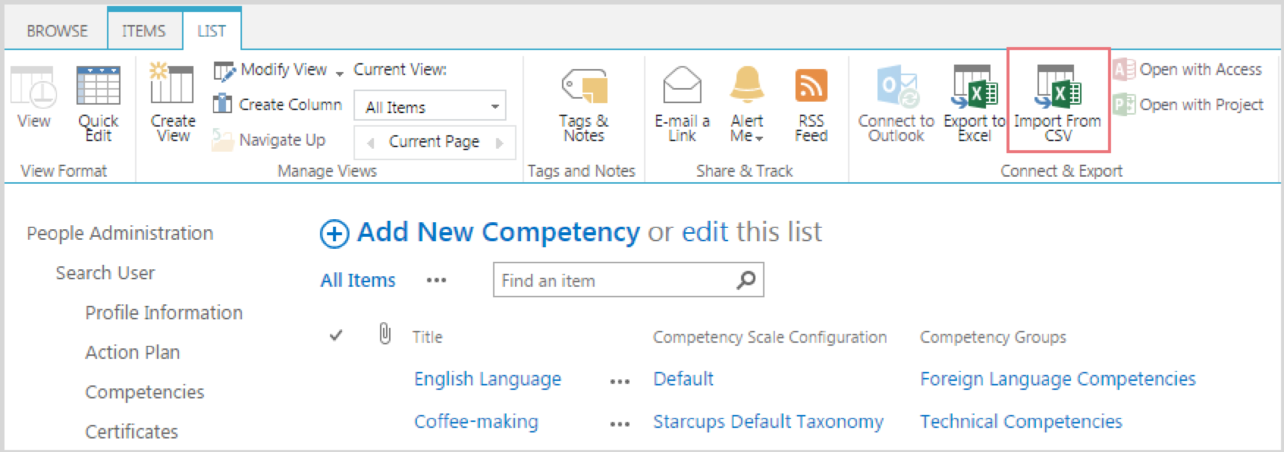
You will be redirected to the Competencies list with new Competency added to it.

4.3.3 Import Competency

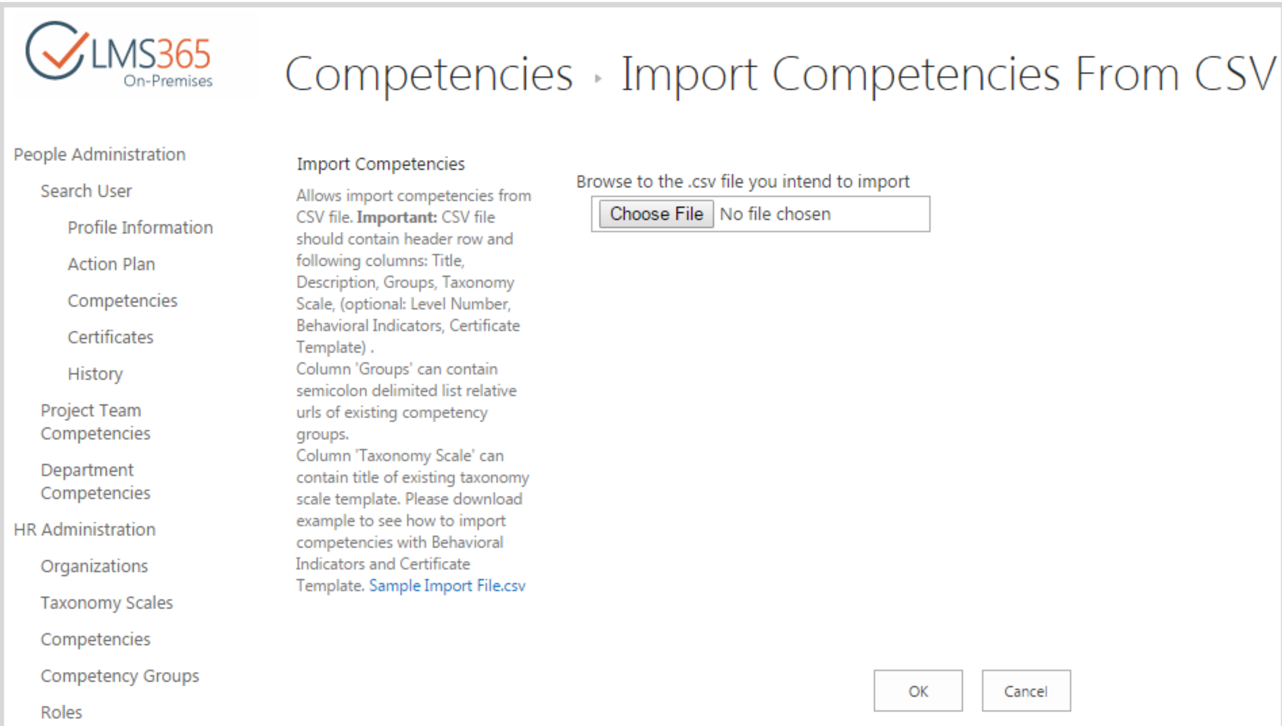
It is possible to import data from .csv file for the Competency item. The process of importing Competency is described below:

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:

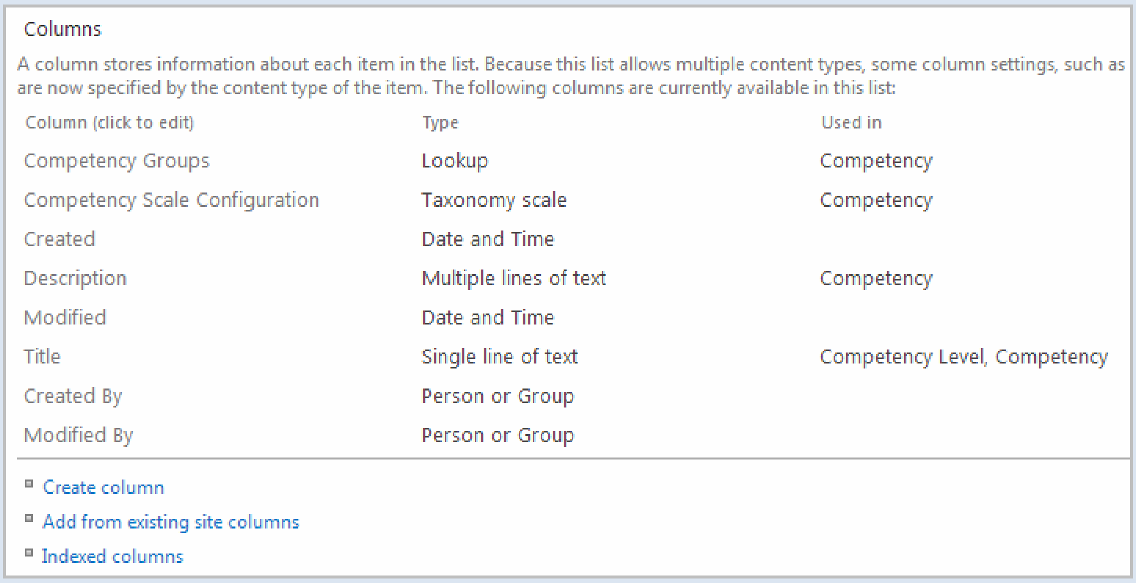


2) Select a .csv file from your computer for upload:

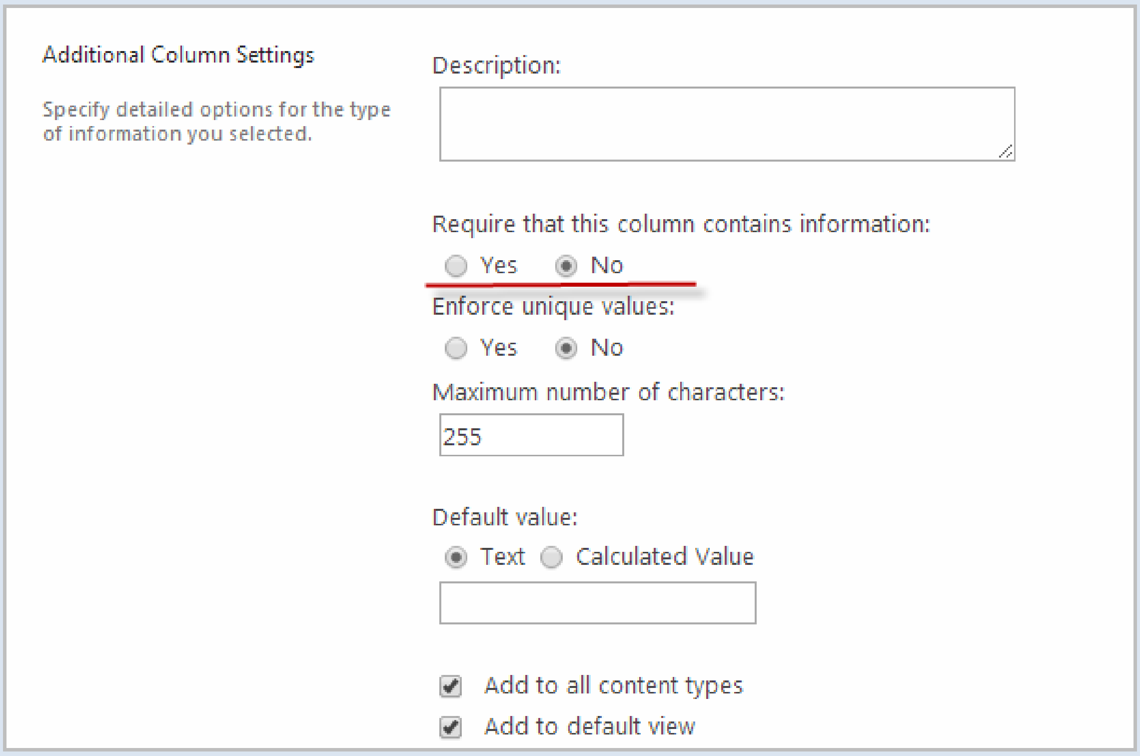


NOTE:	The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

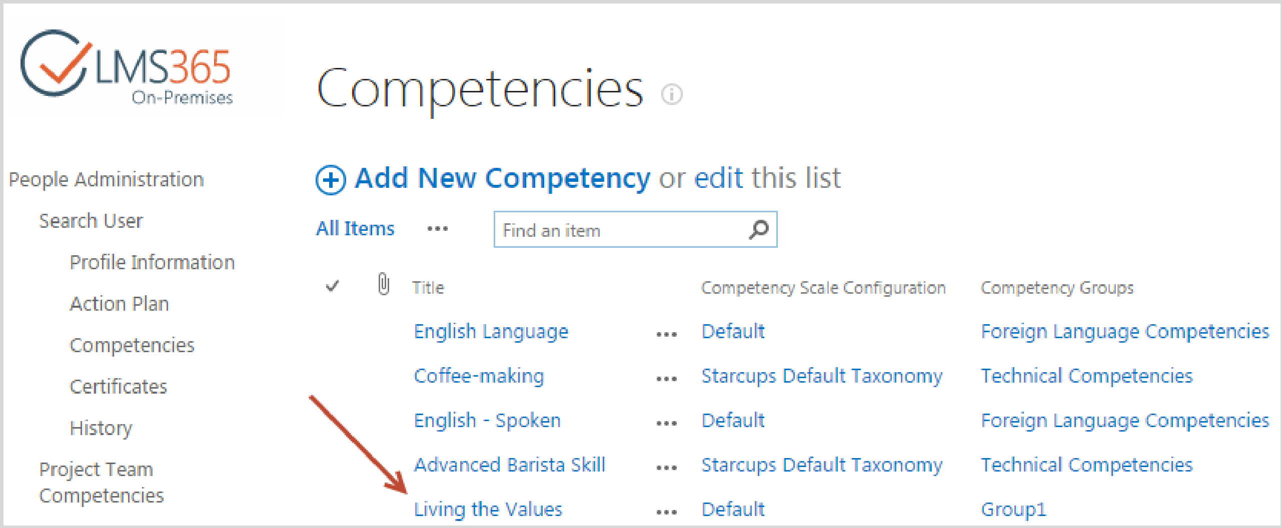
Required columns can be set in Competencies > List > List Settings:



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:



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

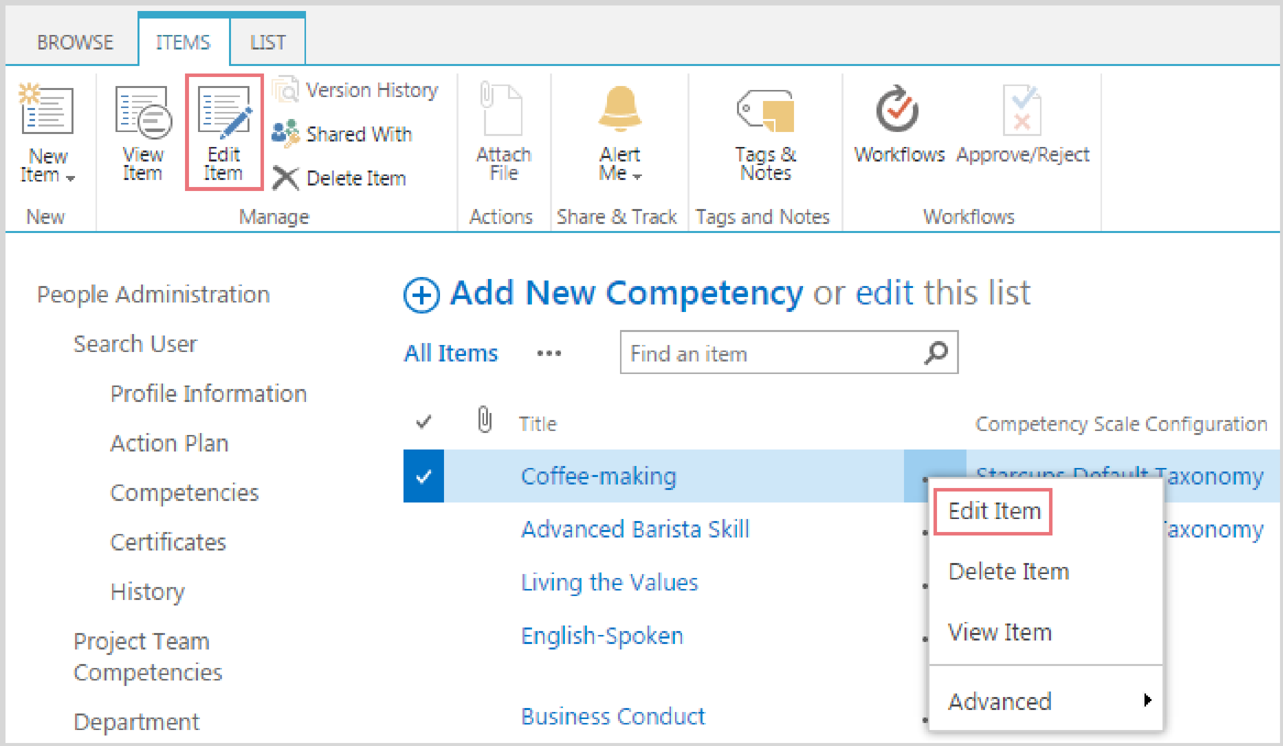


NOTE:	If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Competency with incorrect data will be not uploaded and error will be displayed at the end of action.
NOTE:	If imported Competency duplicates title of already existing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

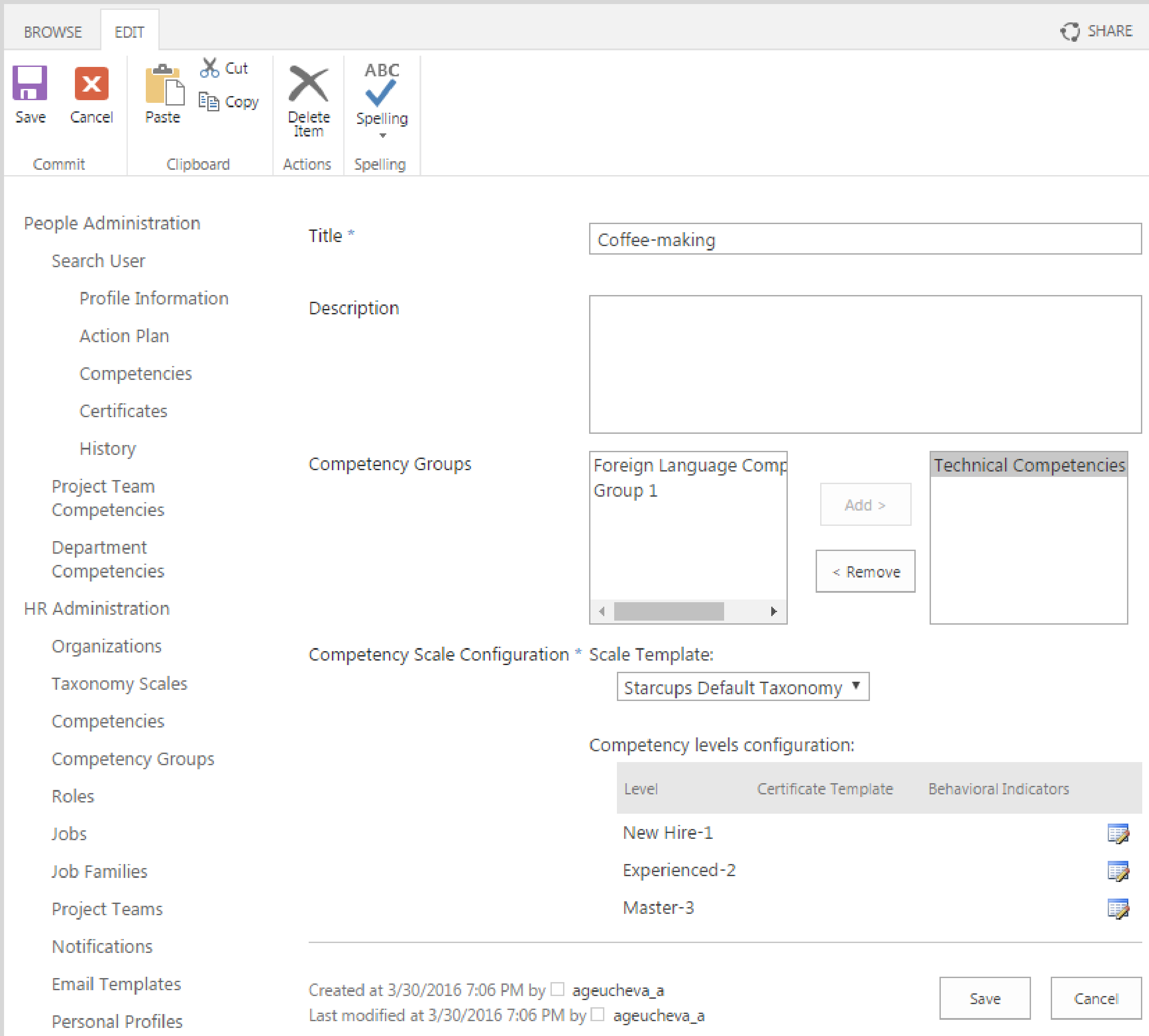
4.3.4 Edit Competency

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:



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

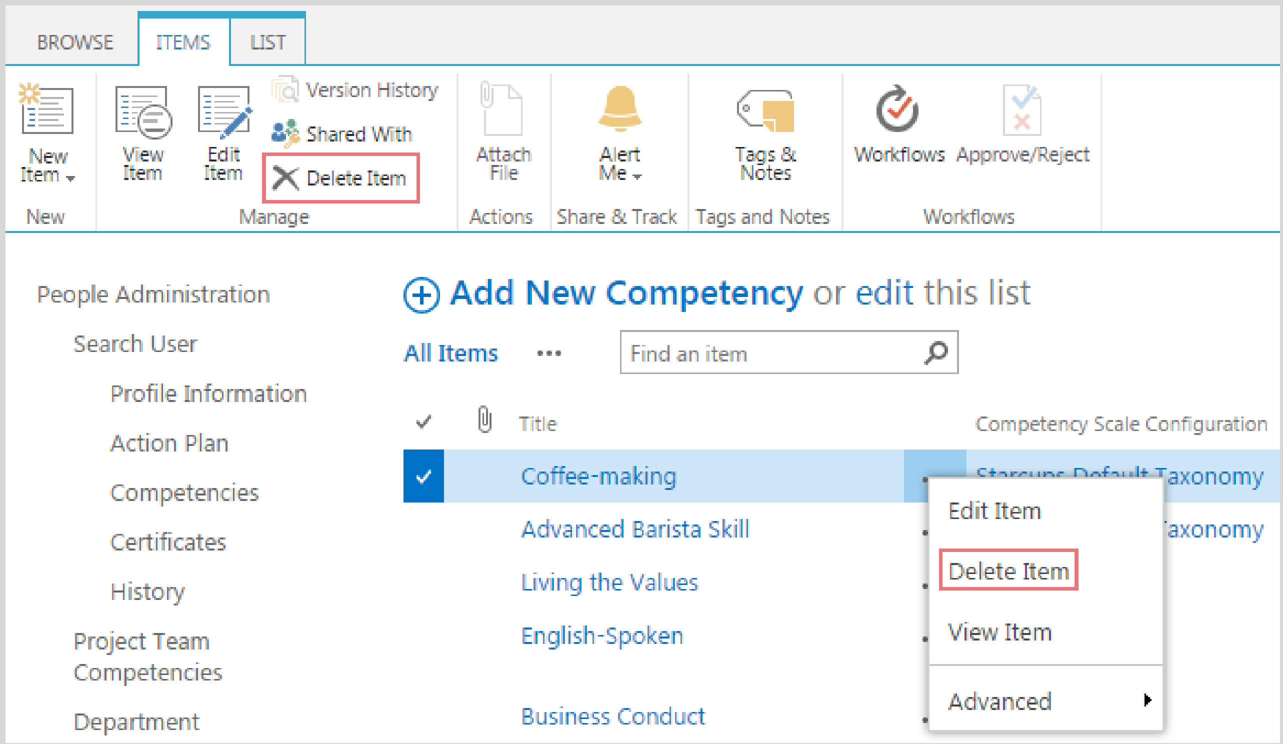


4) Fill in all the necessary information;
5) Click Save button to save the changes <u>OR</u> click Cancel button to discard the changes;
6) You will be redirected to the Competencies list.

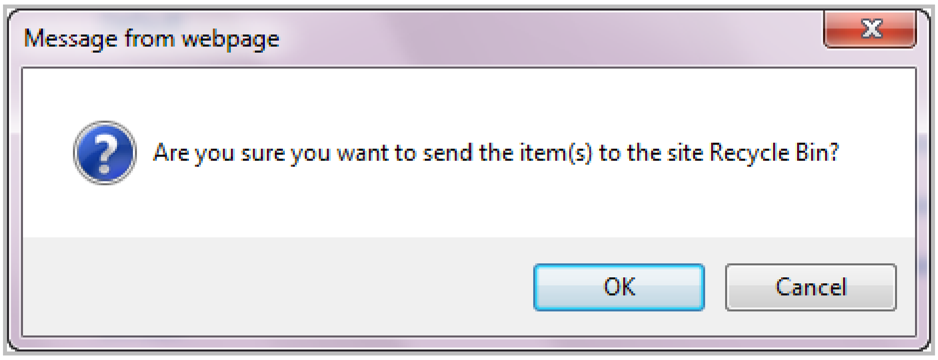
4.3.5 Delete Competency

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:



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

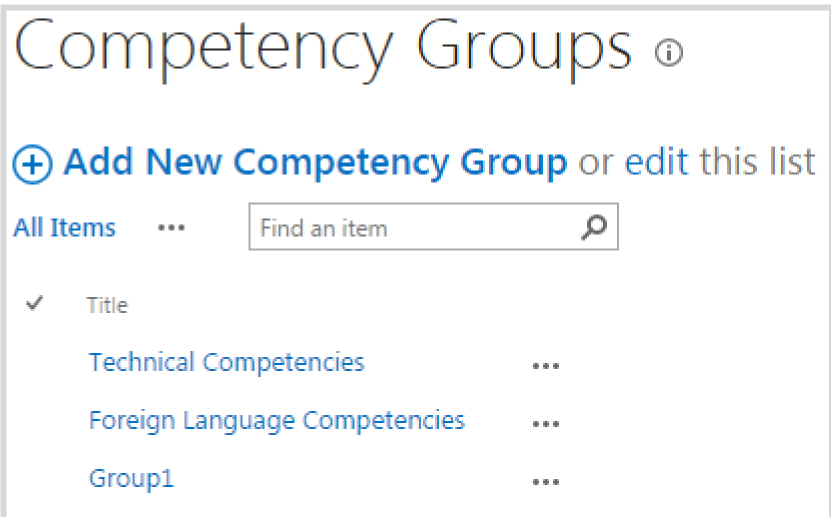
The Global Administrator defines the set of Competency Groups to which the Competencies will be assigned.

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

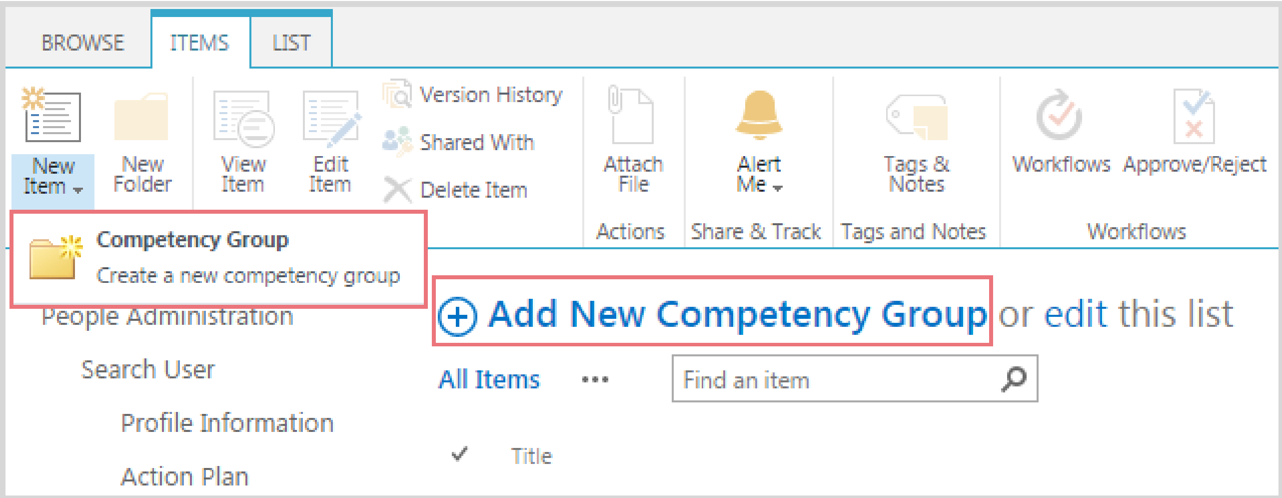
To add a new Competence Group, follow these steps:

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

    a. Click Add New Competency Group button ⊕;

OR

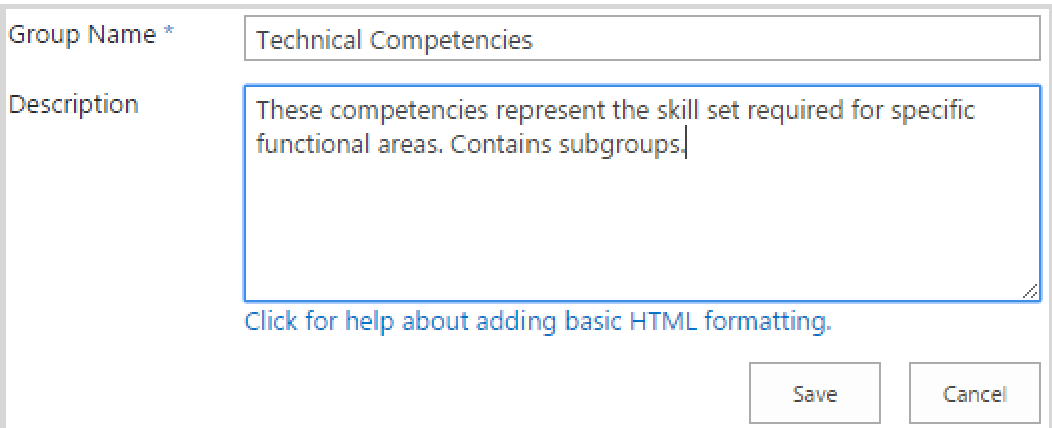
    b. On the ribbon go to Items > New Item and click Competency Group from the drop-down:



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:



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

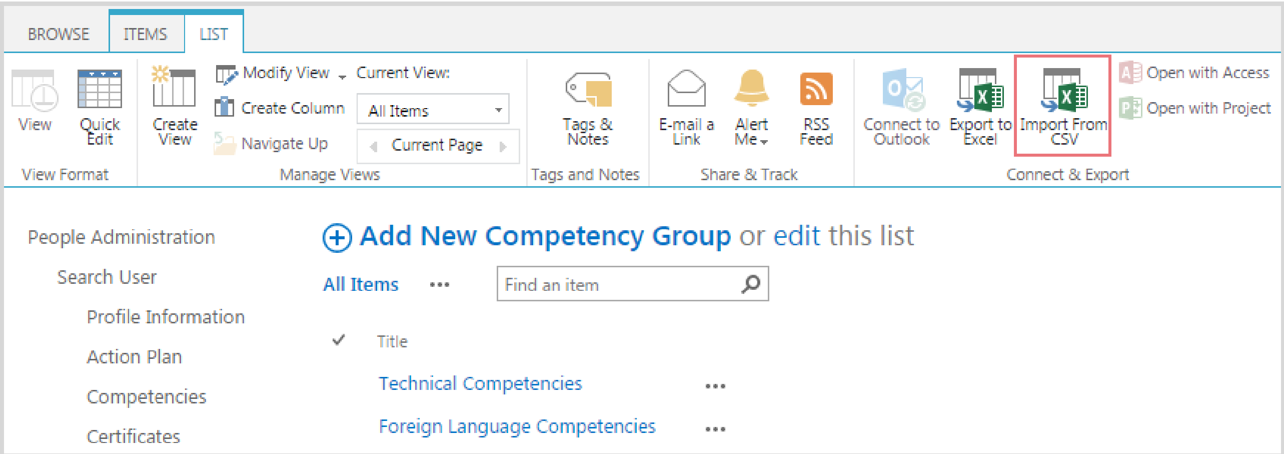
The user is redirected back to the Competency Groups list where newly added Competency Group is displayed.

4.4.2 Import Competency Group

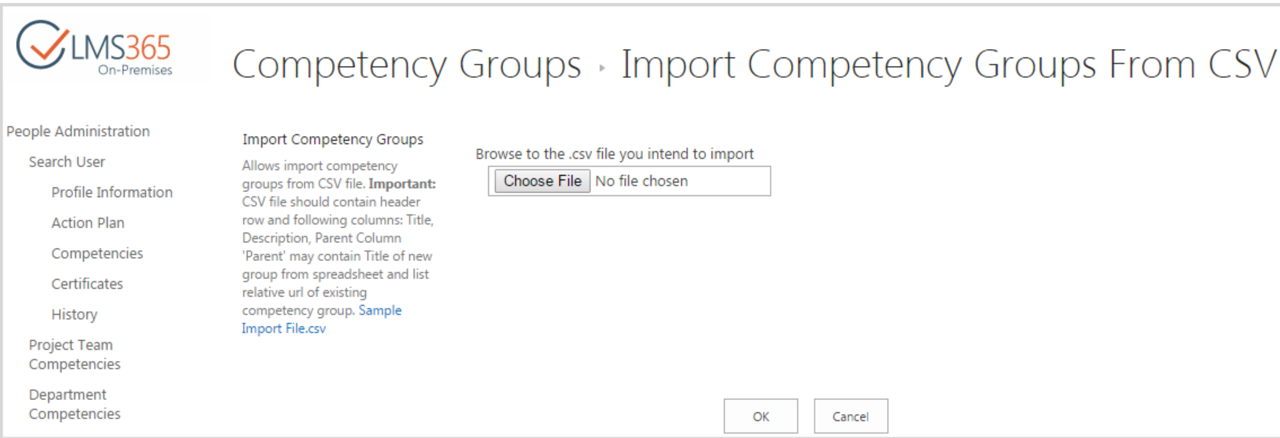
It is possible to import data from .csv file for the Competency Group item. The process of importing Competency Group is described below:

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:

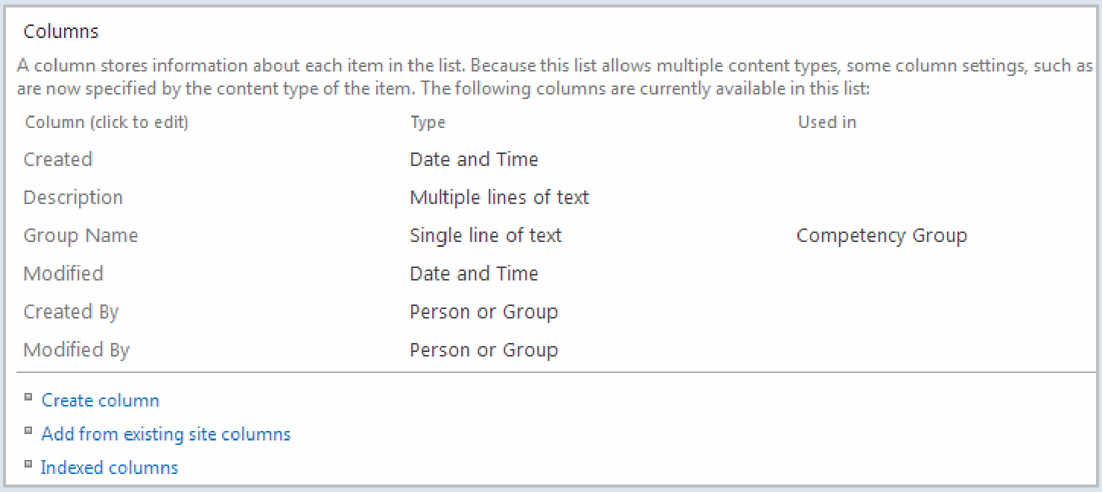


2) Select a .csv file from your computer for upload:

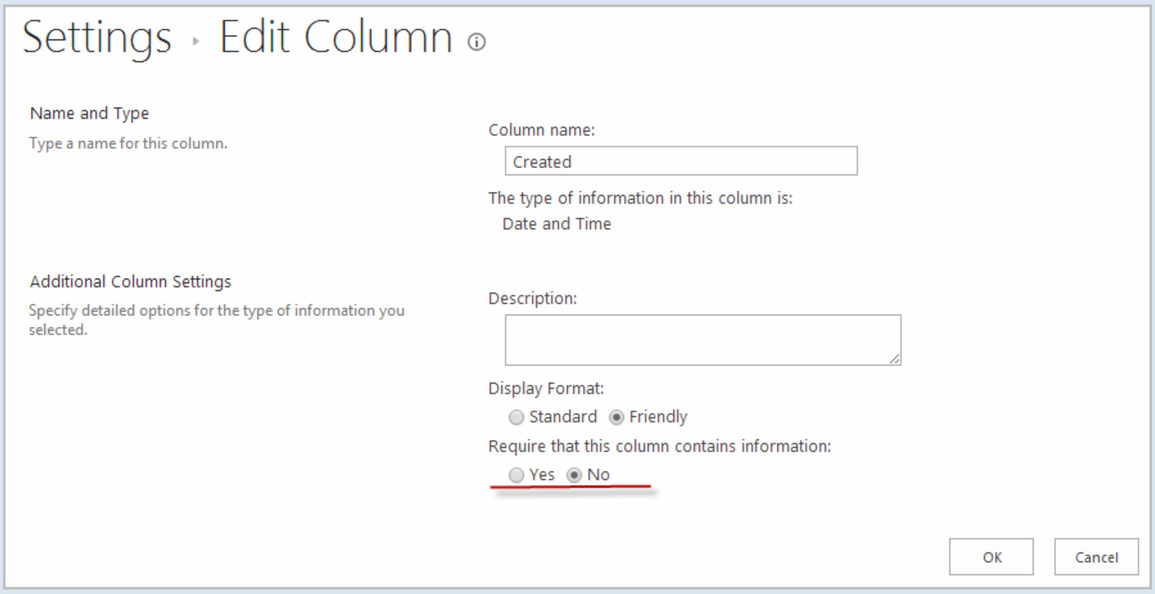


NOTE:	The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

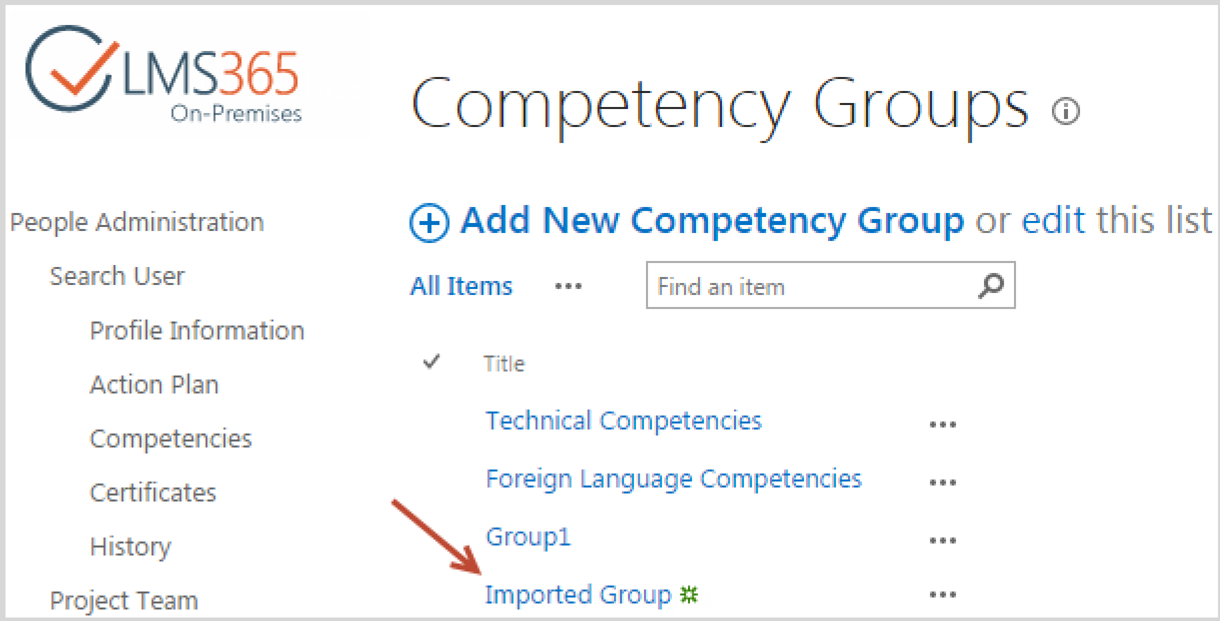
Required columns can be set in Competency Groups > List > List Settings:



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:



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

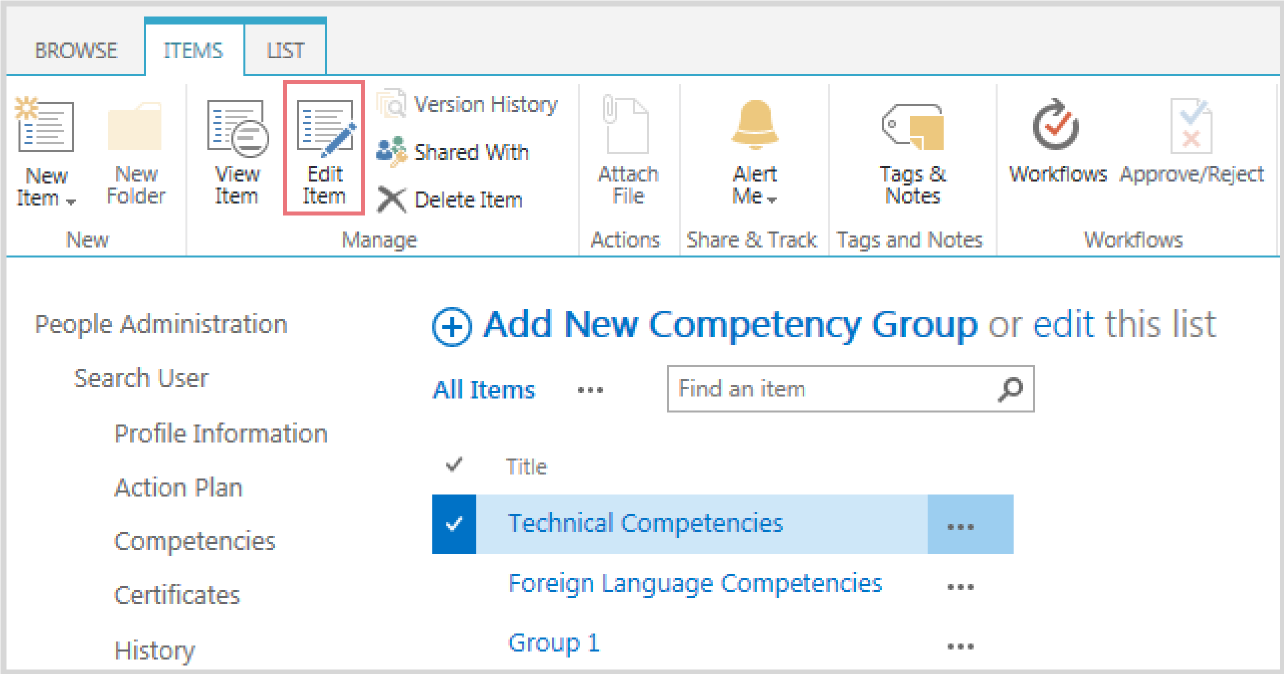


NOTE:	If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Competency Group with incorrect data will be not uploaded and error will be displayed at the end of action. If imported Competency Group duplicates title of already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

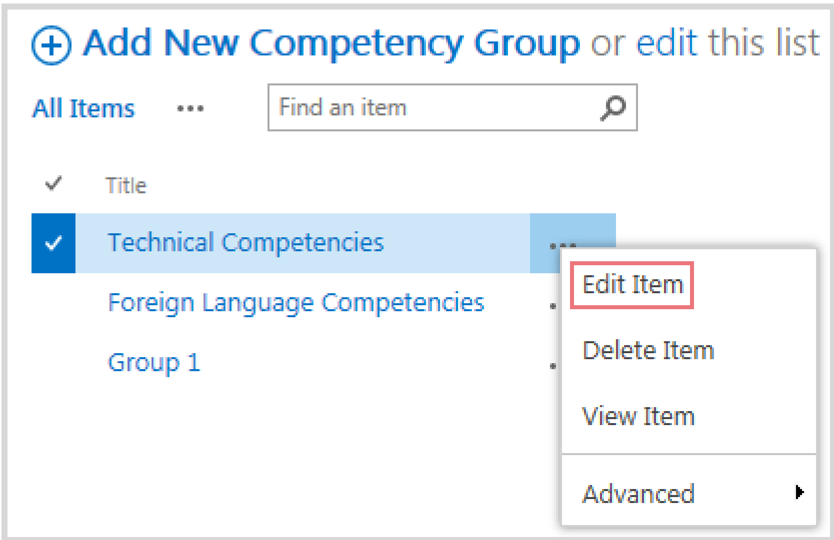
4.4.3 Edit Competency Group

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

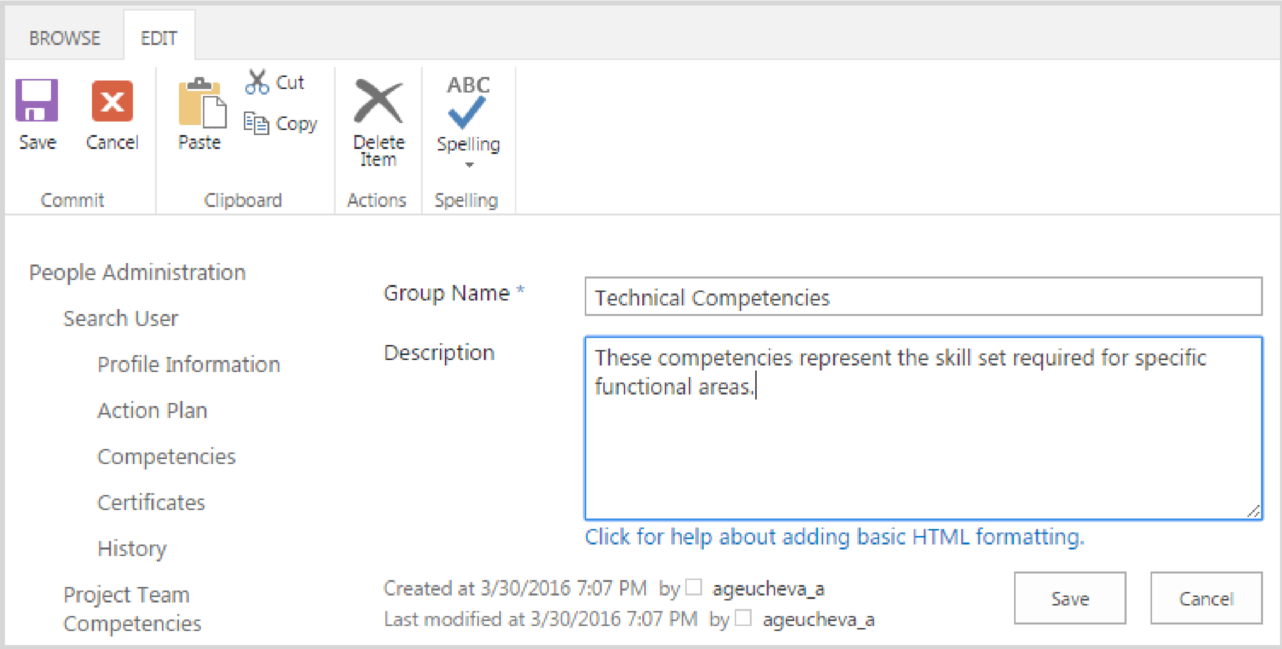
1) Open the Edit form via one of the ways described below:
    a. Click on the Competency Group in the Competency Groups list to select it and from the ribbon choose Edit Item in the Items tab:



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.

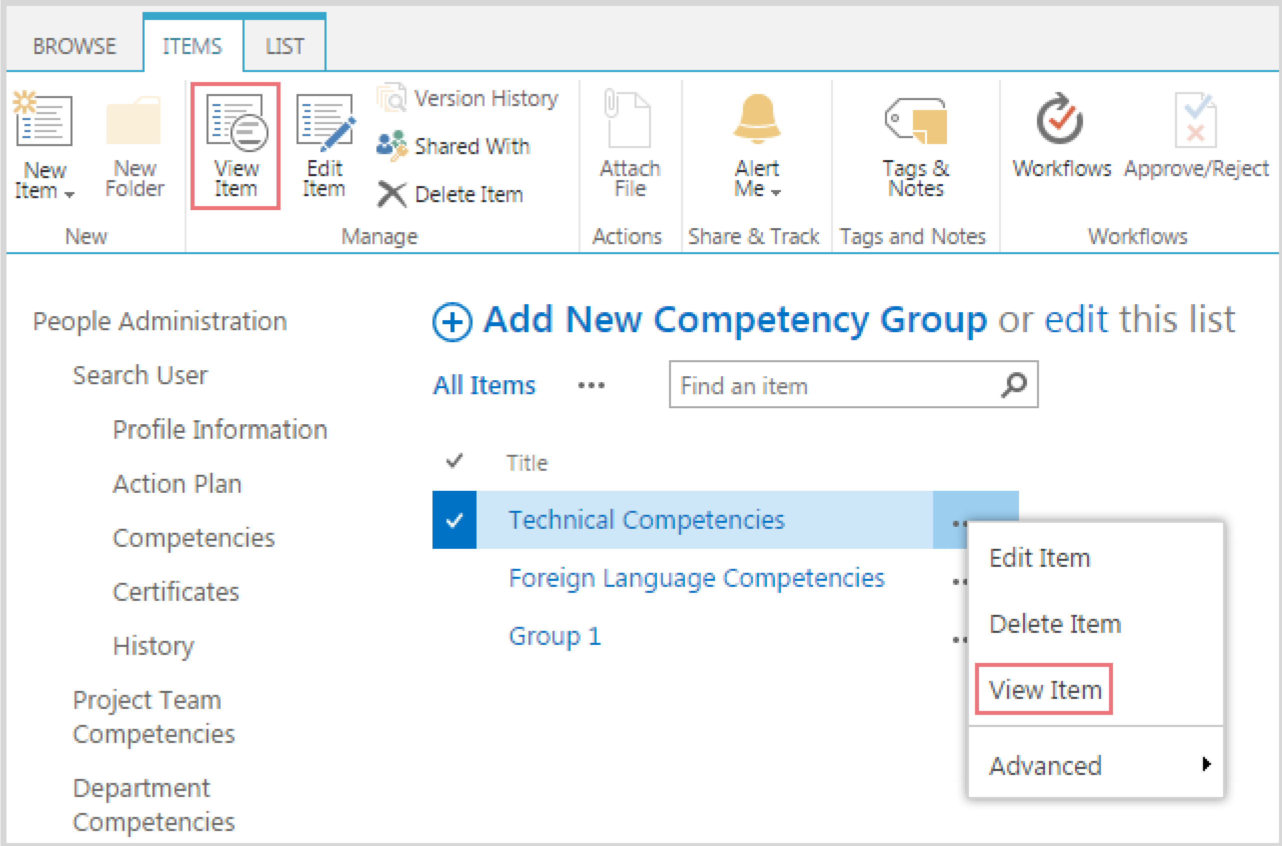
4.4.4 View Competency Group details

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

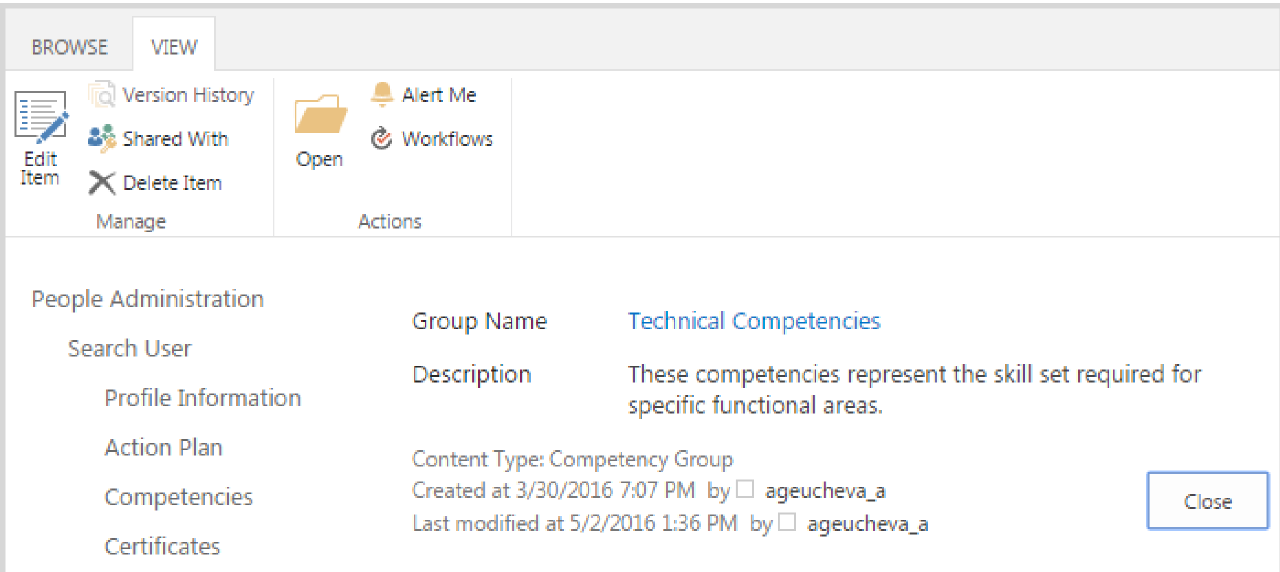
1) Open the Competency Group details form via one of the options described below:
   a. From the callout menu next to the Competency Group's name select View Item action:

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.

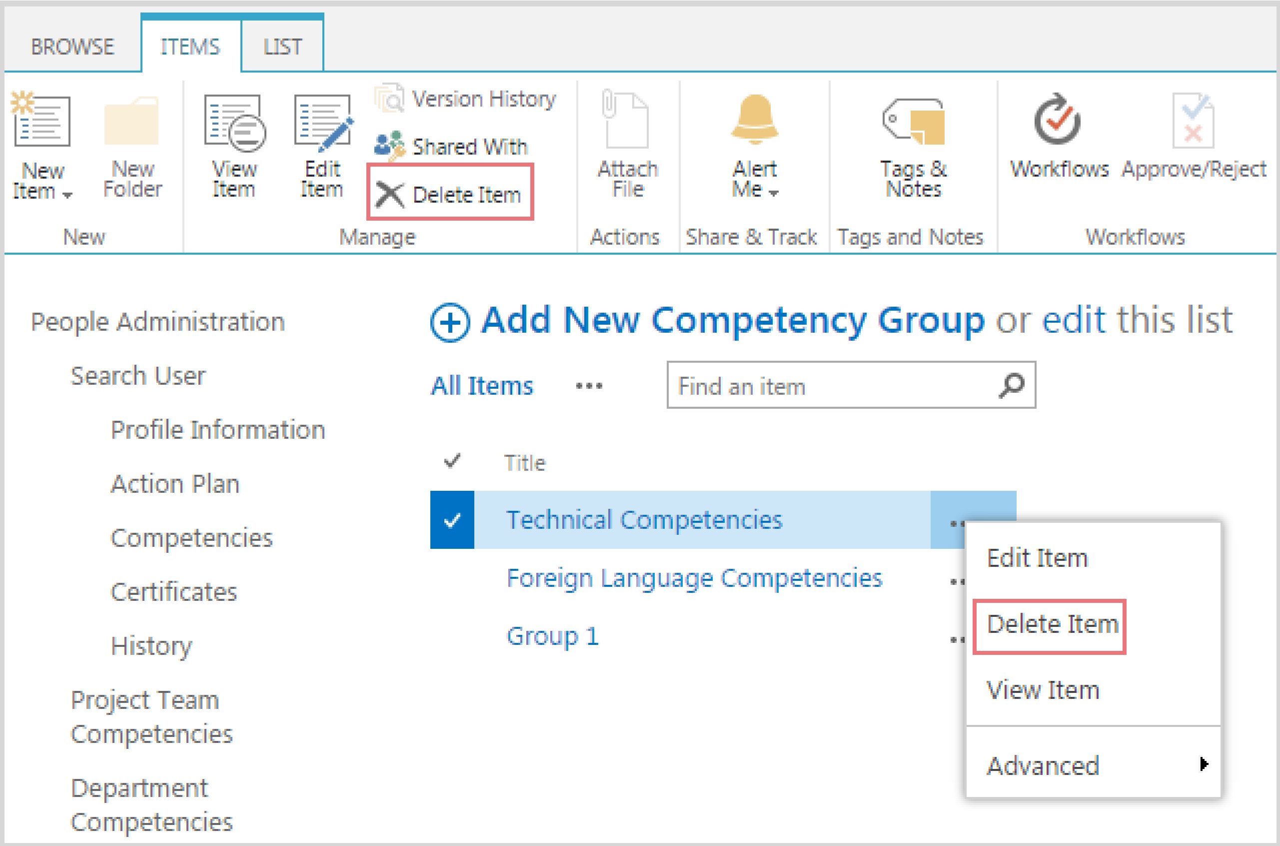
4.4.5 Delete Competency Group

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

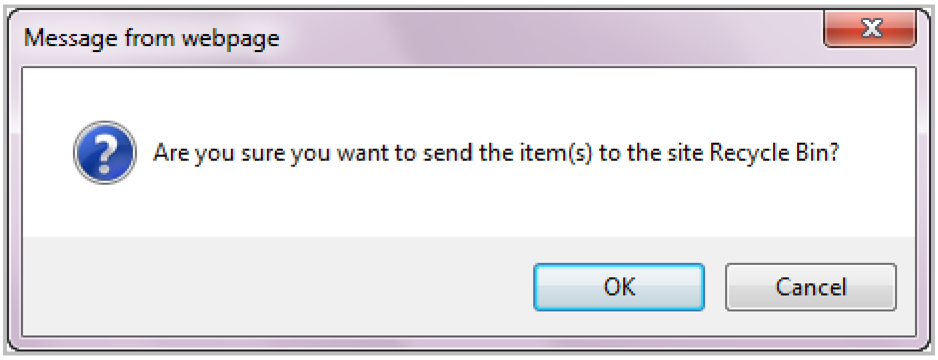
1) Open the Delete Competency Confirmation via one of the options described below:

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.

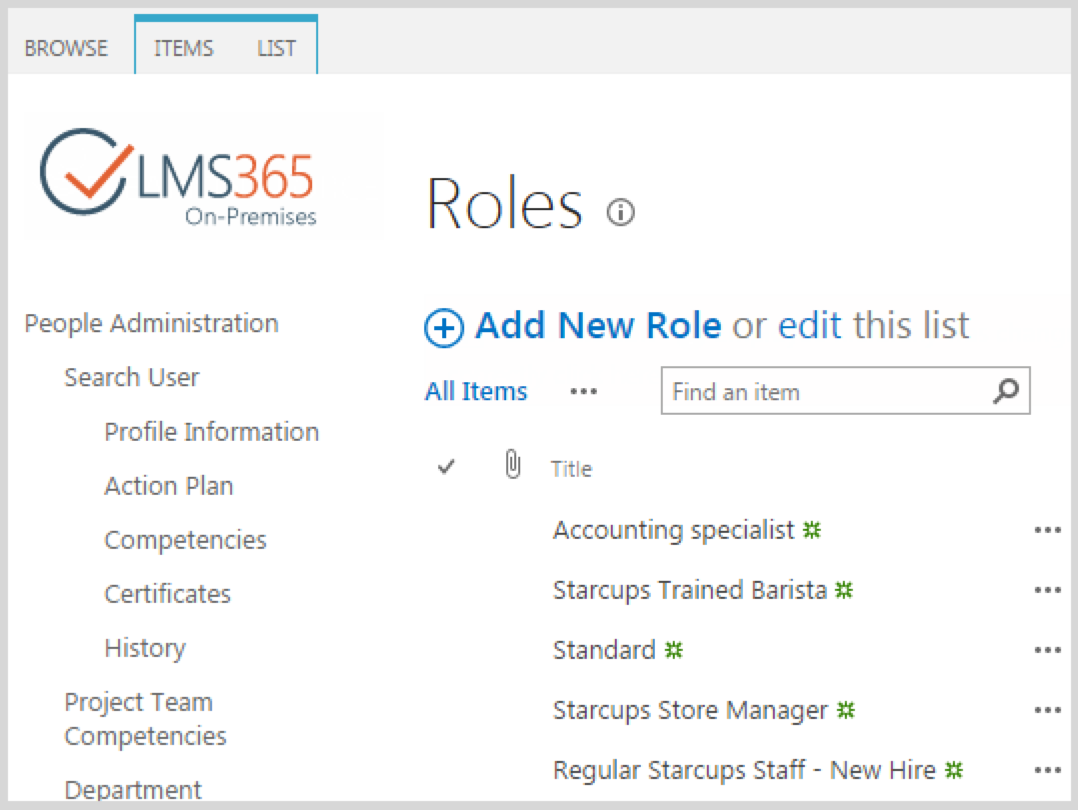
NOTE:	• Competency Group deletion is processed according to the OOTB SharePoint rules for deleting records • When Competency Group is deleted, all Competencies belonging to this Competency Group are not deleted but this Competency Group is removed from their “Competency Group” field

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

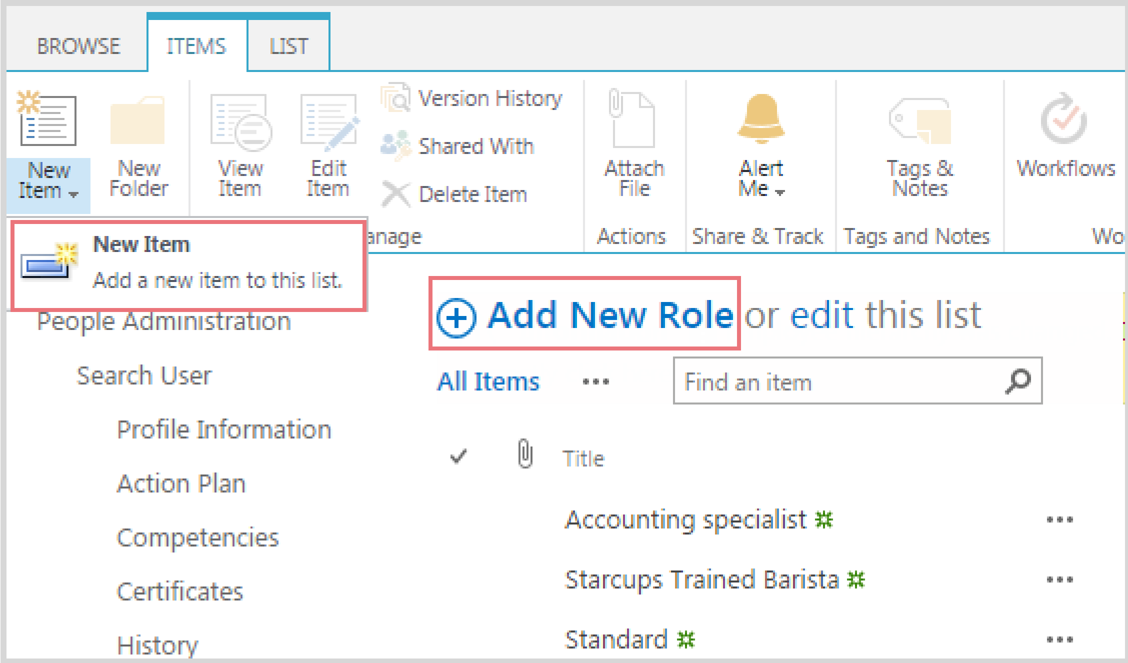
In order to add the new Role, Global Administrator should follow the steps below:

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

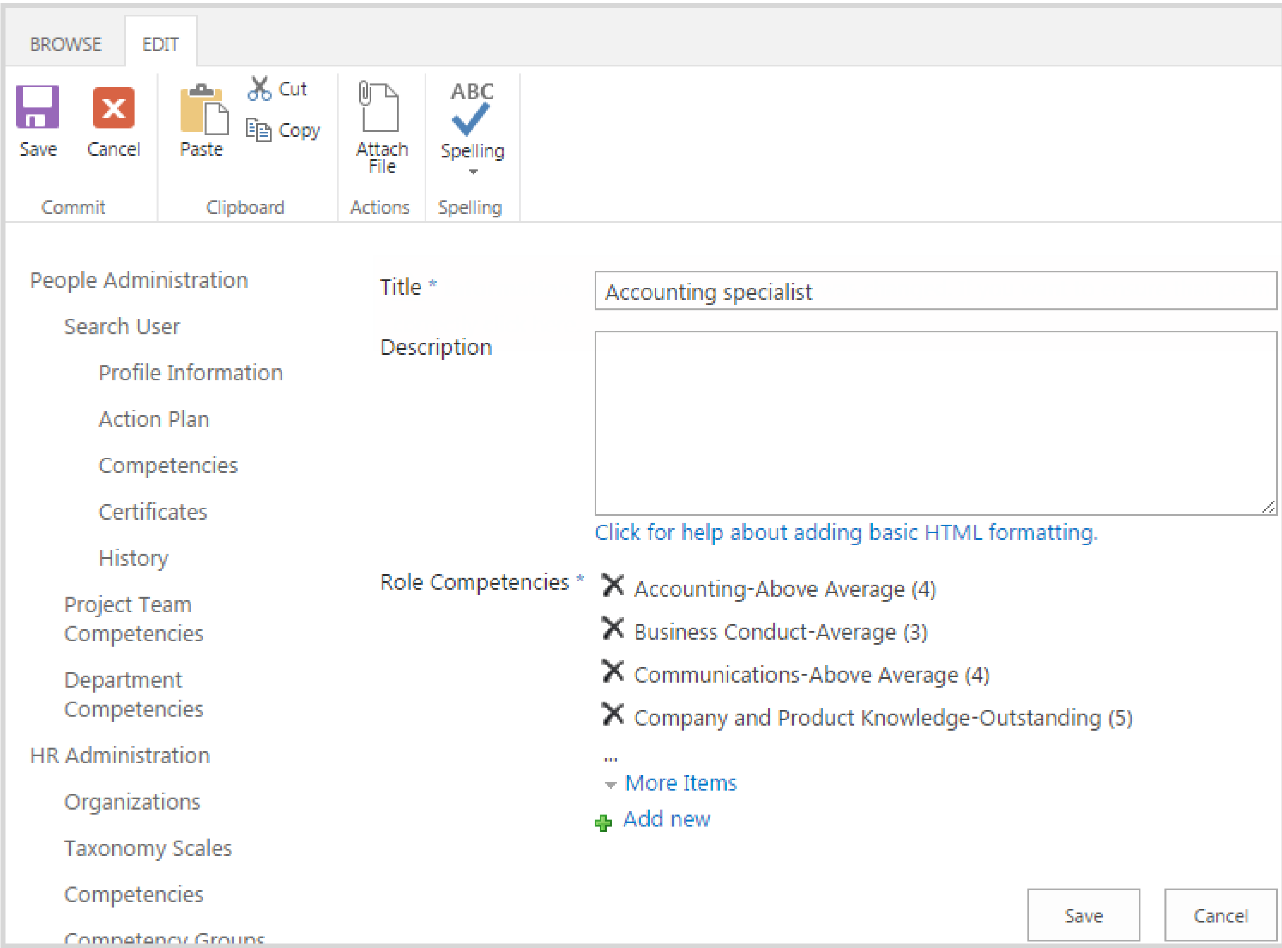
   a. From the Roles list click Add New Role button ;

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.

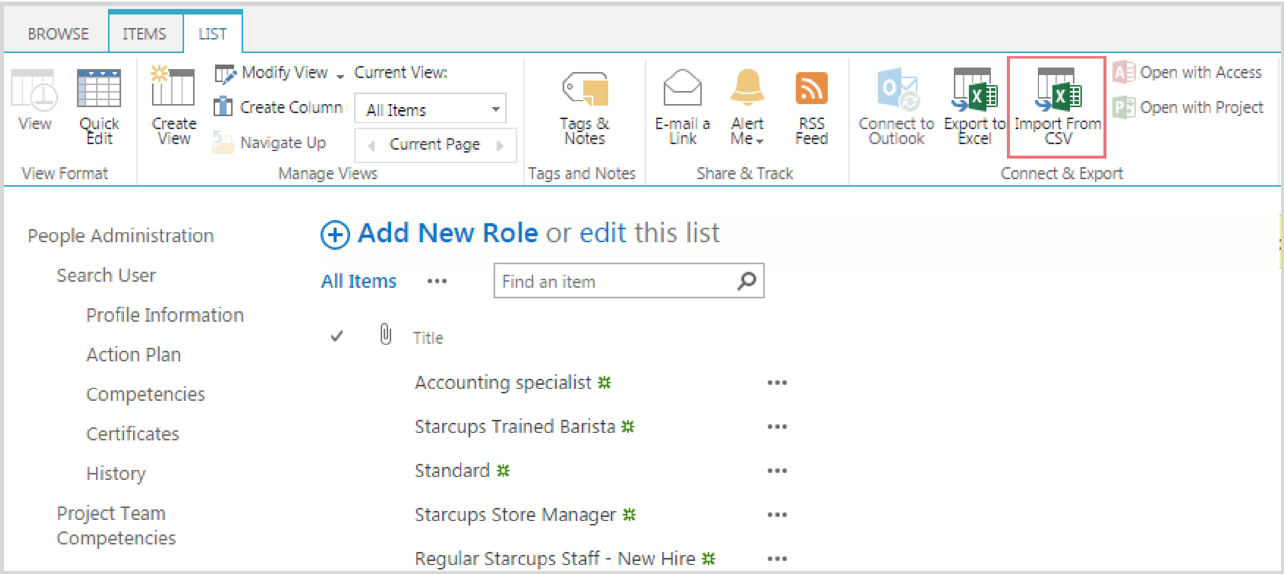
3) Click Save button to add new Role to the Roles list or click Cancel to discard the process. The user is redirected back to the Roles list where newly added Role is displayed.

4.5.2 Import Role

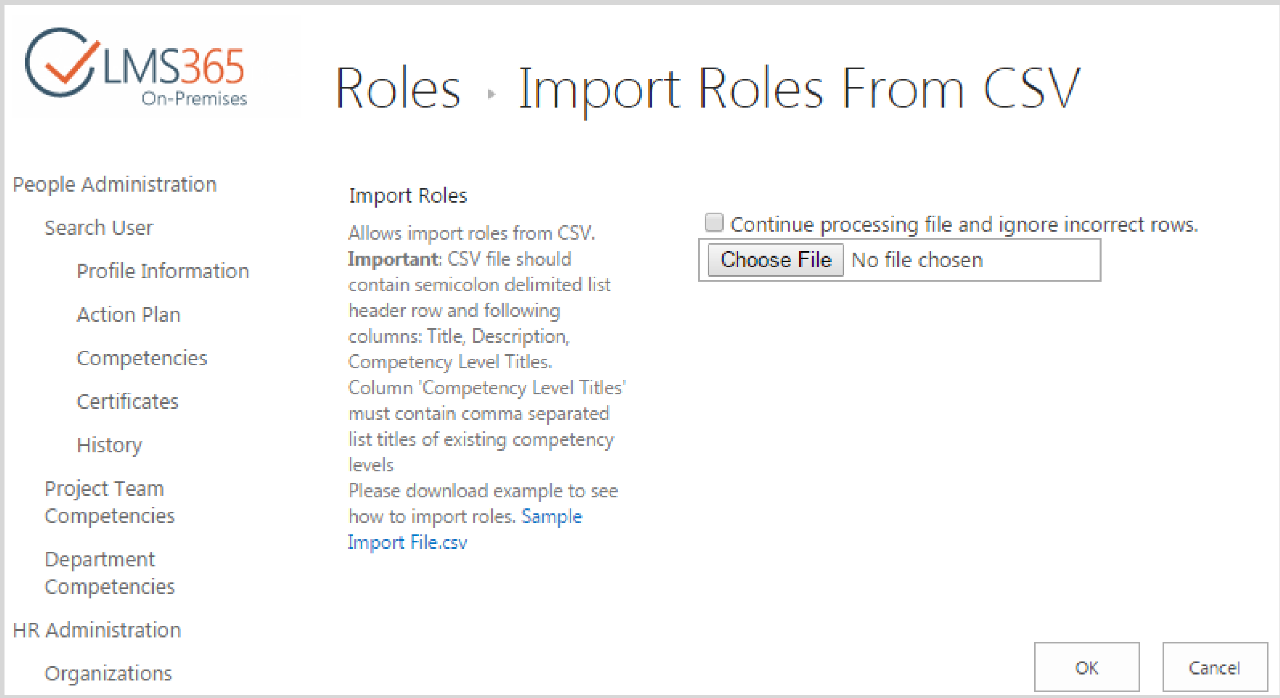
It is possible to import data from .csv file for the Role item. The process of importing Role is described below:

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:

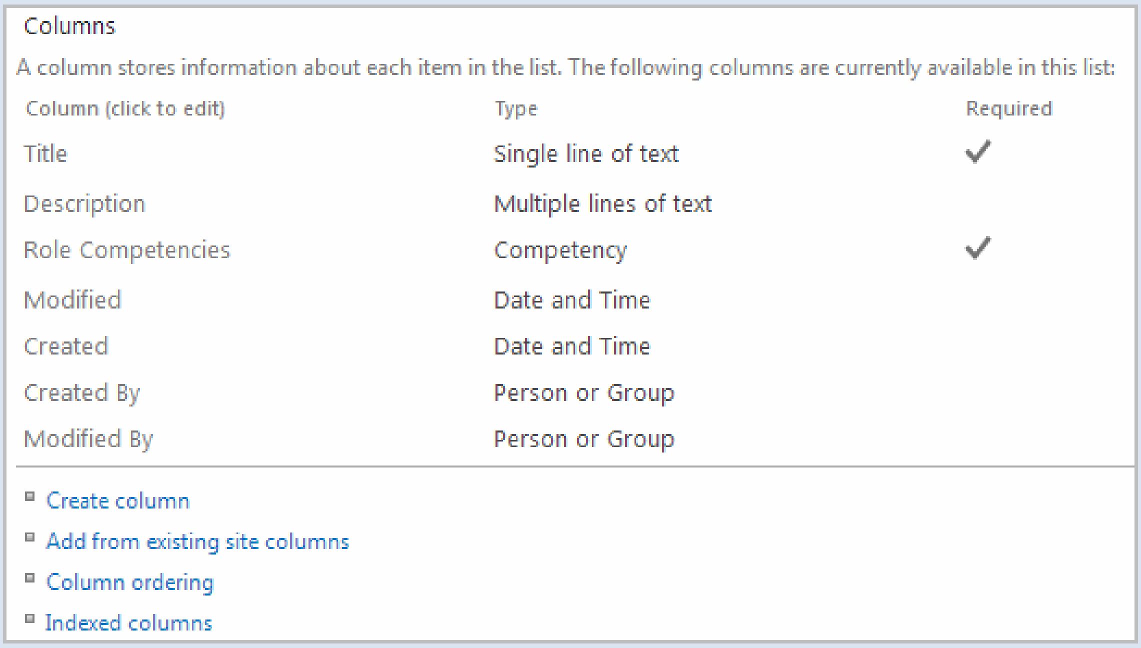


2) Select a .csv file from your computer for upload:

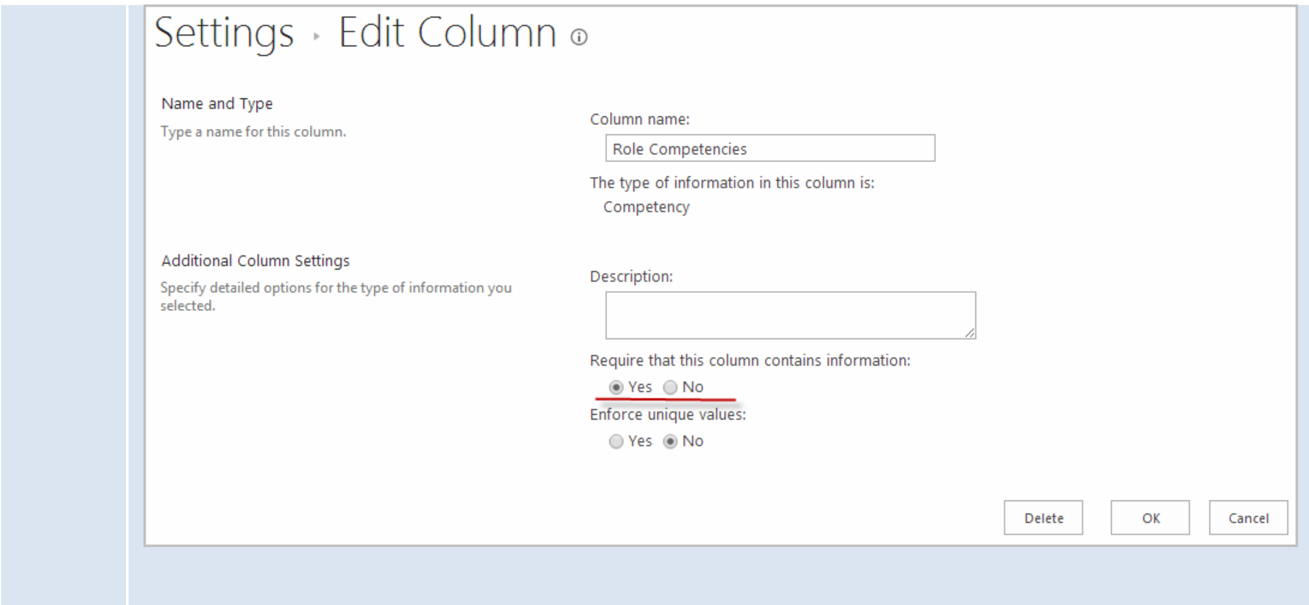


NOTE: The uploaded file should contain header row and all required columns. You can use the sample file a starting point for creation of your own set of data.

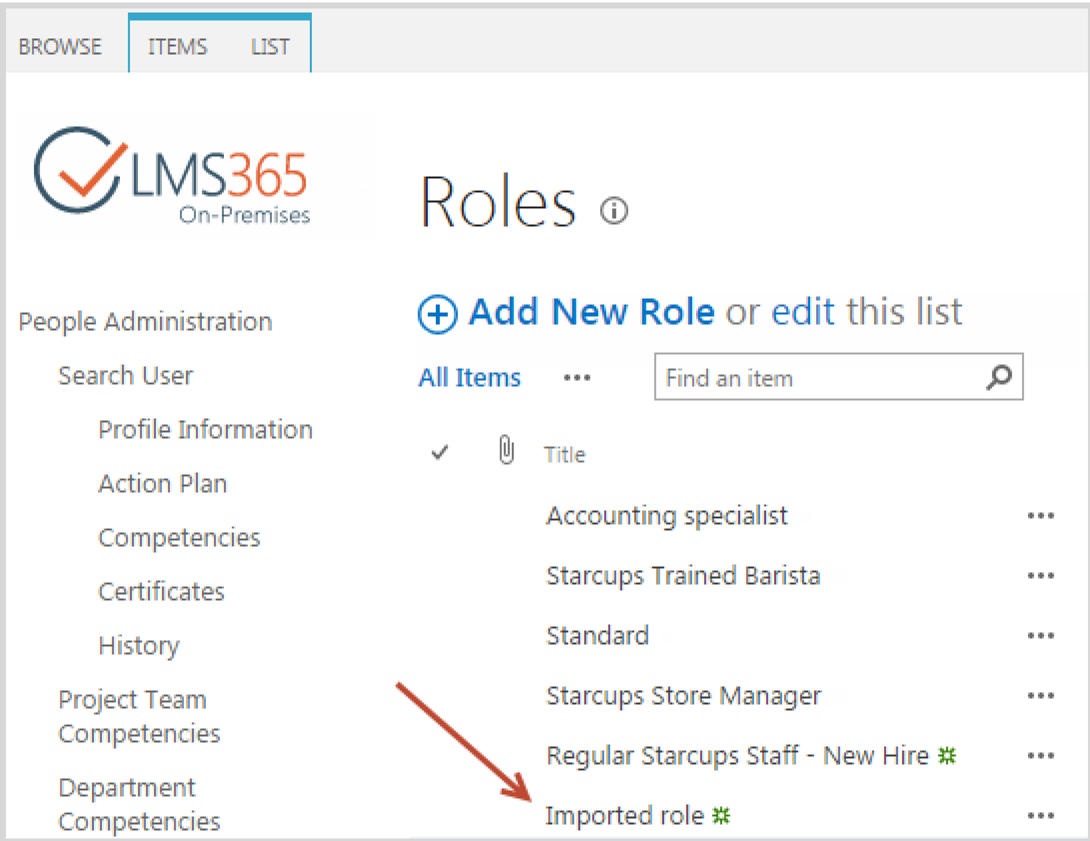
Required columns can be set in Roles > List > List Settings:



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:



3) Click OK to confirm import. The imported Role 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. 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

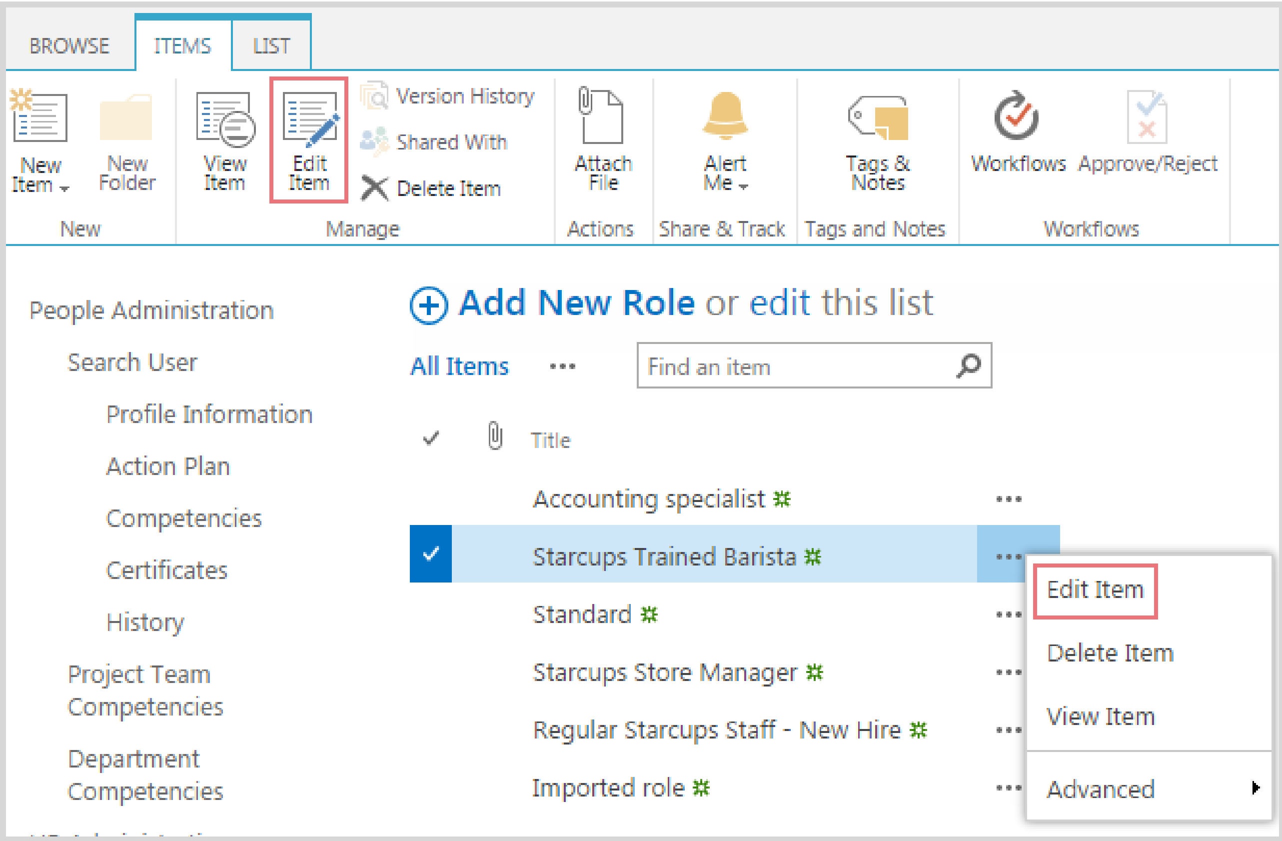
To edit the Role, the Global Administrator should follow the steps below:

1) Open the Edit form via one of the ways described below:

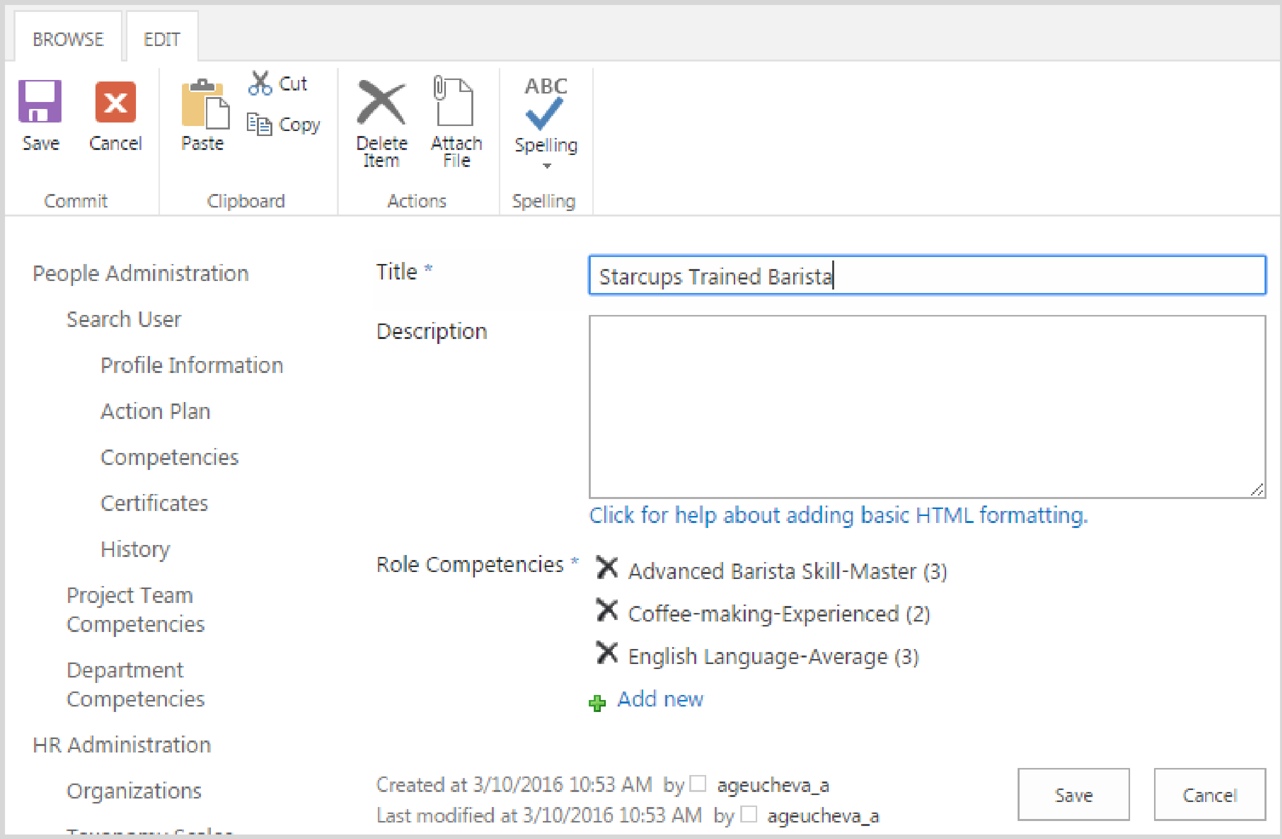
   a. Click on the Role to select it and from the ribbon choose Edit Item in the Items tab;

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:



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

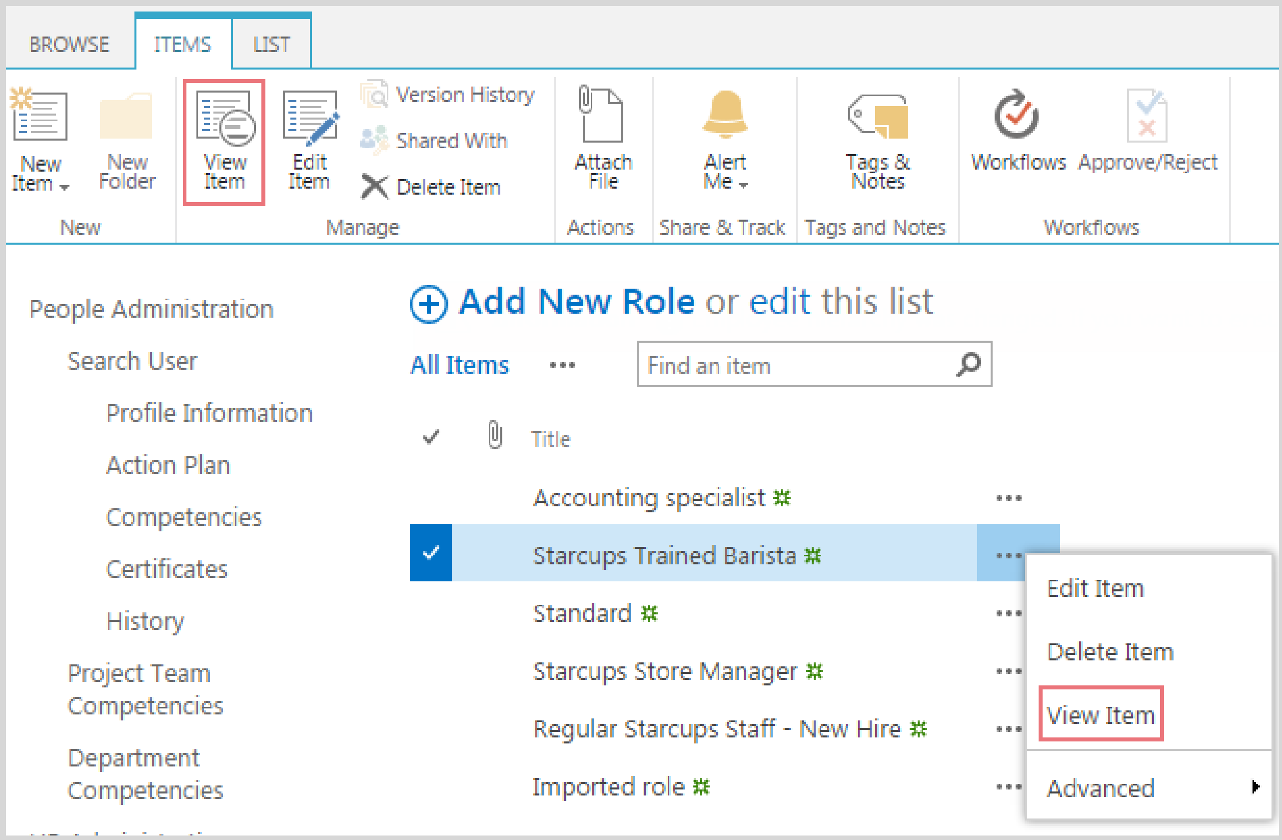
The user is redirected back to the Role's list.

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

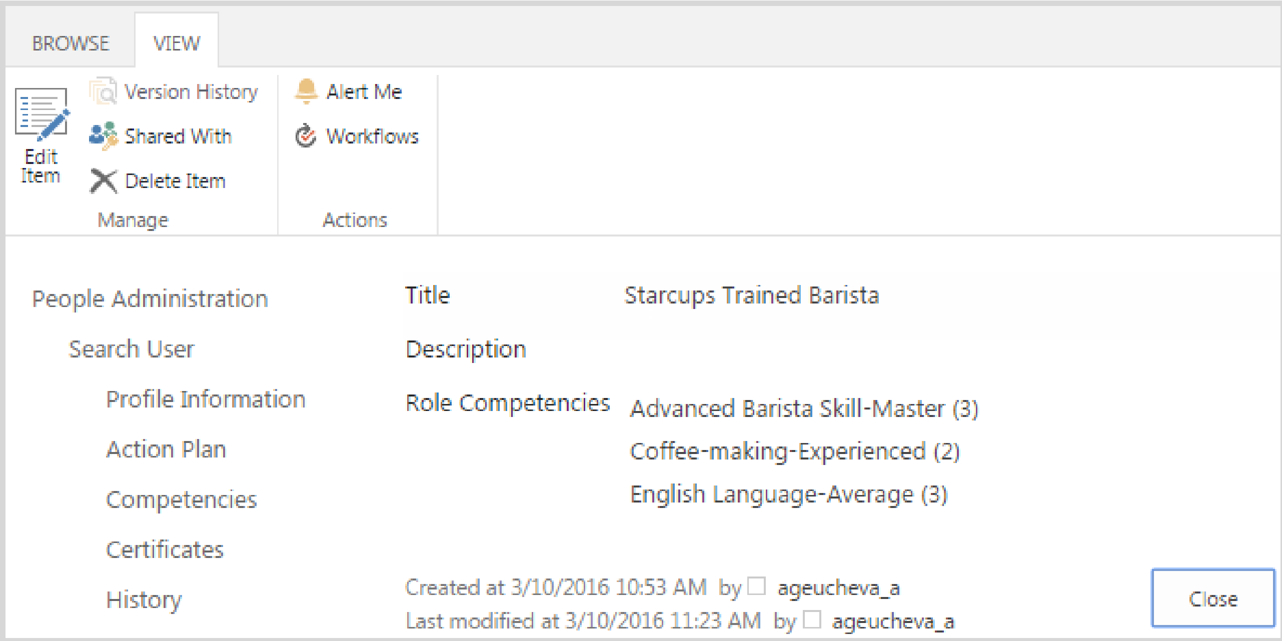
4.5.4 View Role's details

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
New
View Item
Edit Item
Version History
Shared With
Delete Item
Manage
Attach File
Actions
Alert Me
Share & Track
Tags & Notes
Tags and Notes
Workflows
Approve/Reject
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:



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

4.5.5 Delete Role

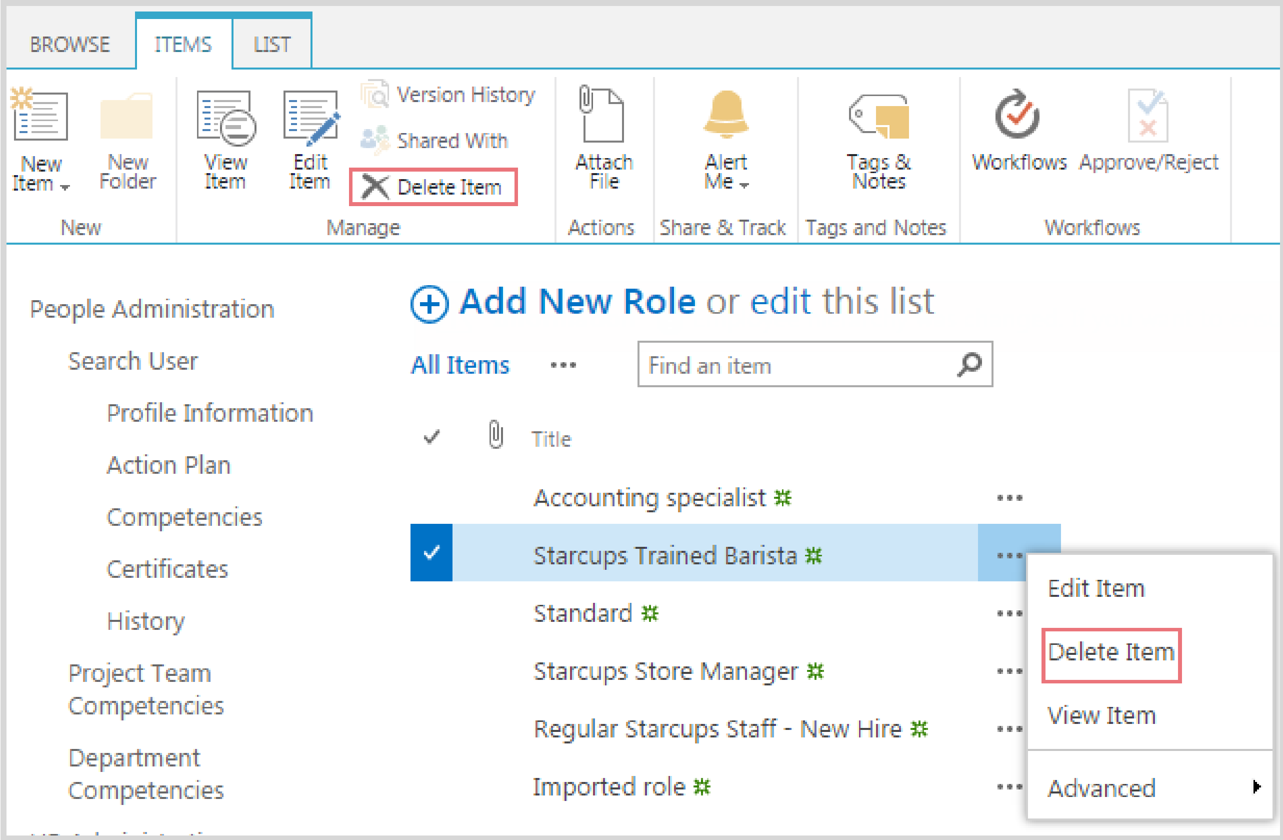
To remove the Role from the Roles list, the Global Administrator should follow the steps below:

1) Click Delete Item either

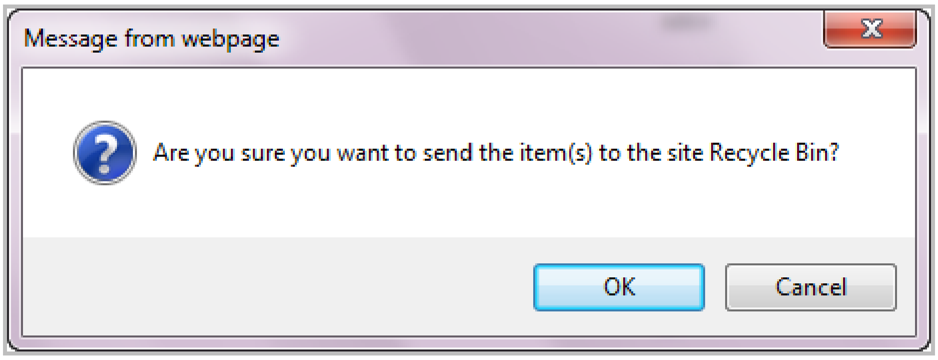
   a. From the drop-down action list next to the Role's name;

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:

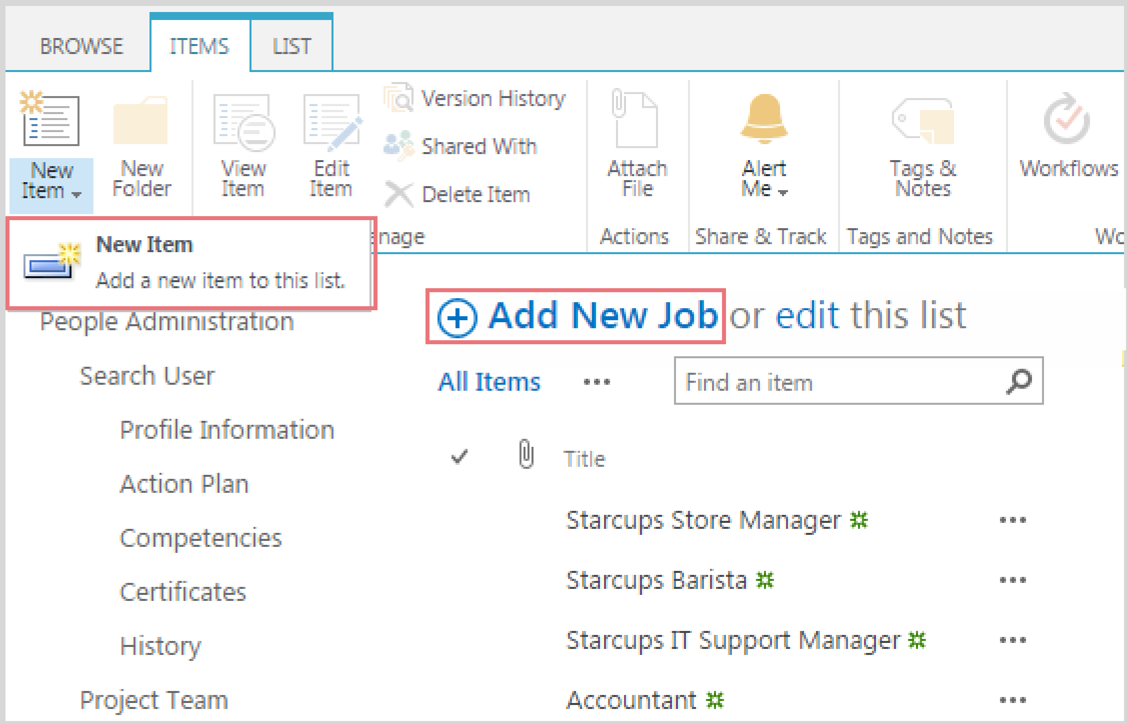
4.6.1 Add Job

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

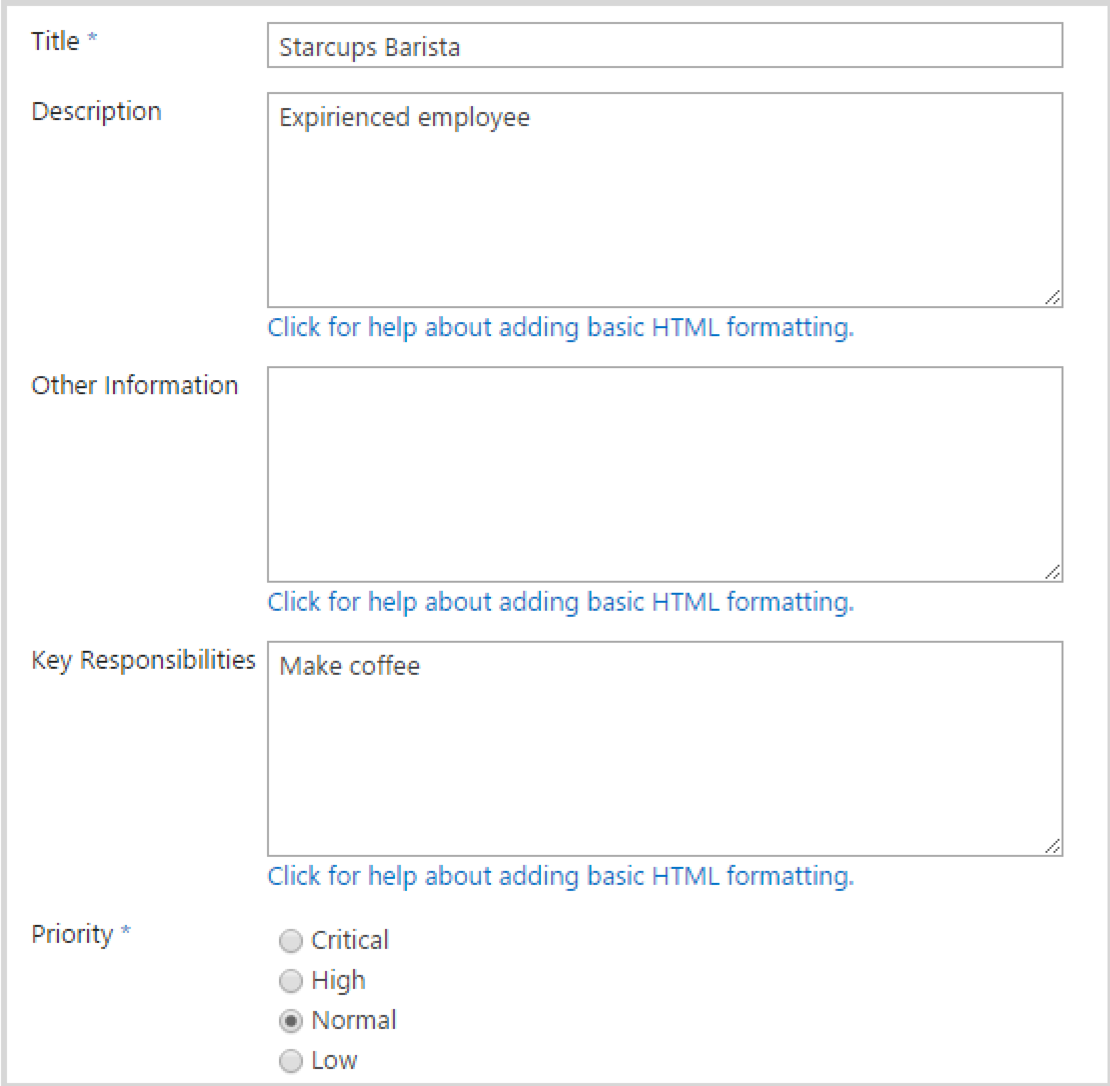
1) To open Add New Item form use either one of the options below:
   a. From the Jobs list click Add New Job button ;

OR

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

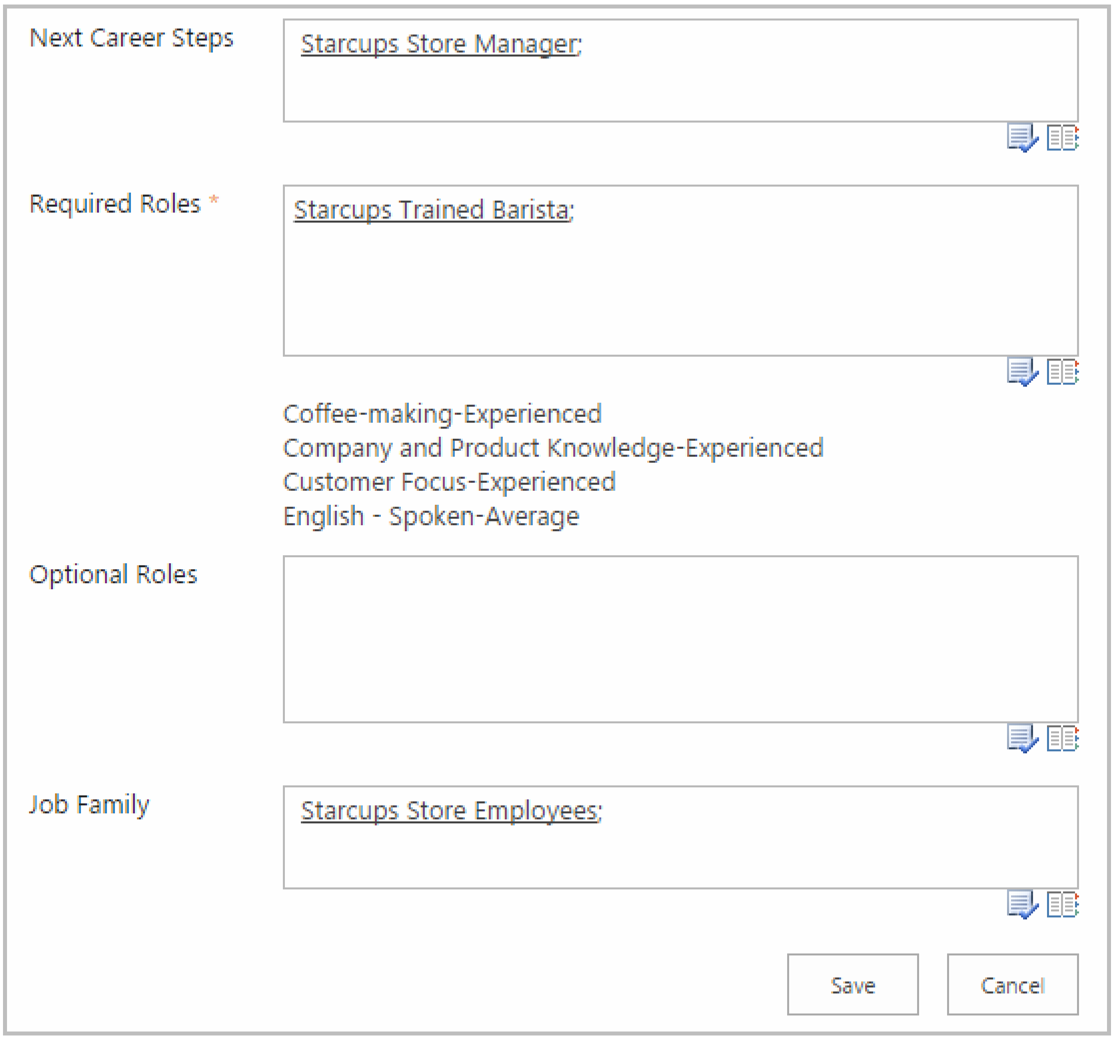


2) Fill out the Jobs – New item form:
   - Title – enter the name of the new Job;
   - Description – optionally add short description for the new Job;
   - Other Information – optionally add any other information pertaining to this new Job that might be of importance to other Administrators;
   - Key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



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:



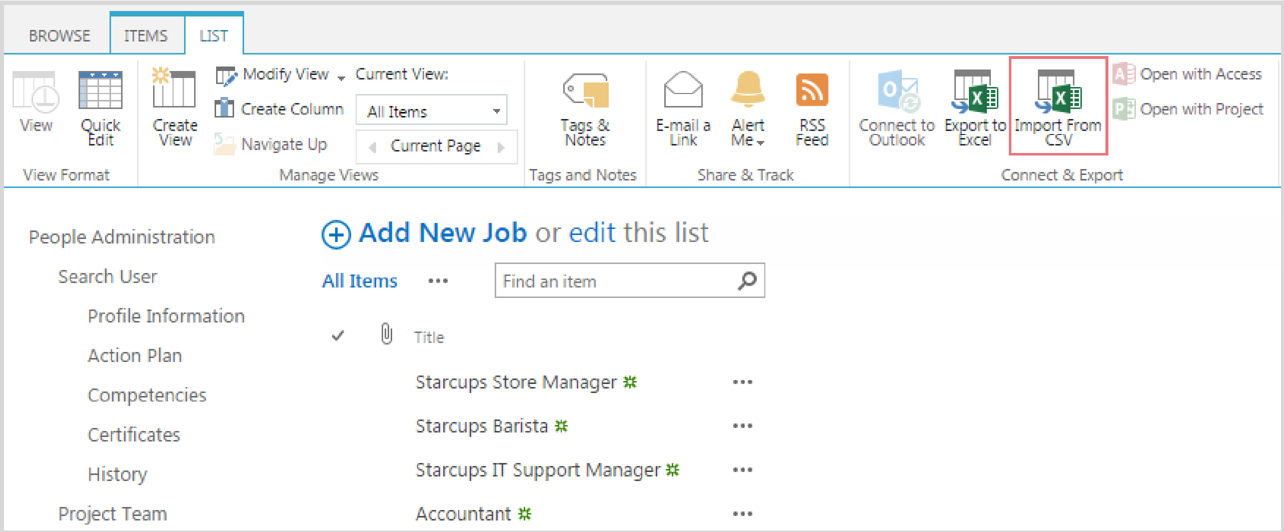
4) Click Save button to add new Job to the Jobs list or click Cancel to discard the process. The user is redirected back to the Jobs list where newly added Job is displayed.

4.6.2 Import Job

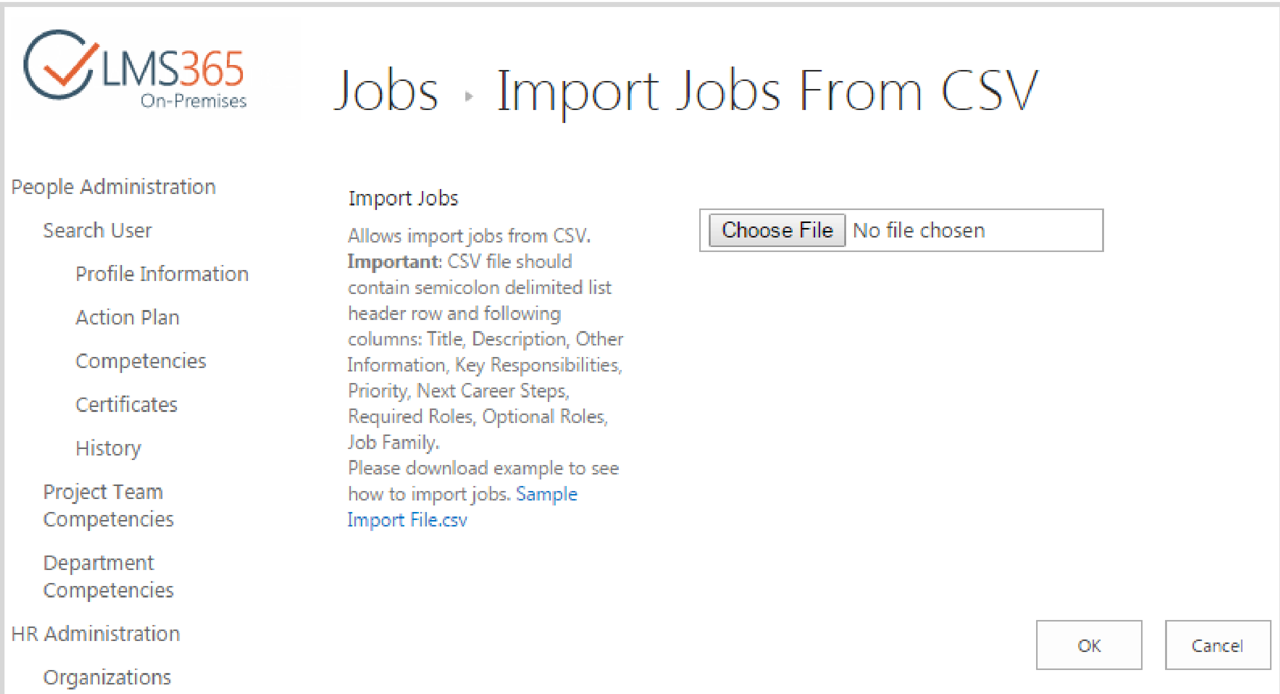
It is possible to import data from .csv file for the Job item. The process of importing Job is described below:

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:

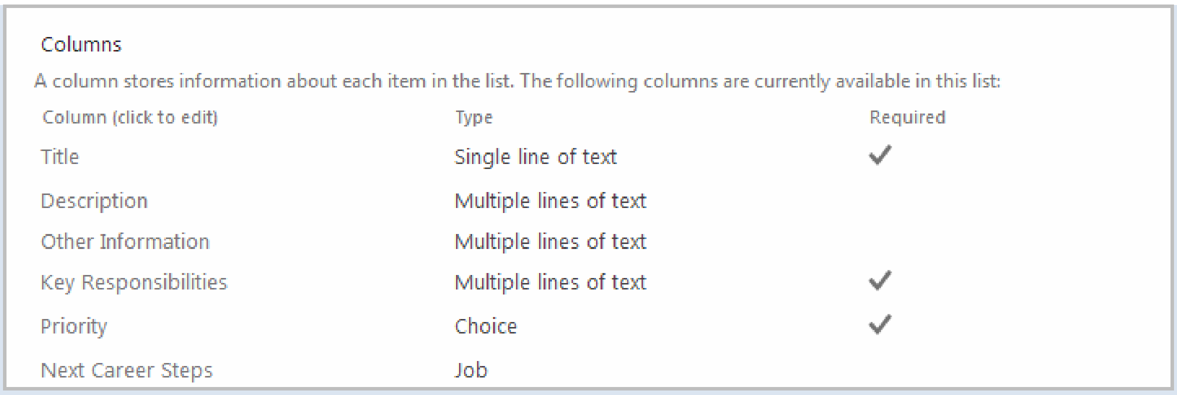
1) Enter the Jobs list and click the Import from CSV button in the List Tools > List in the ribbon menu:



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:

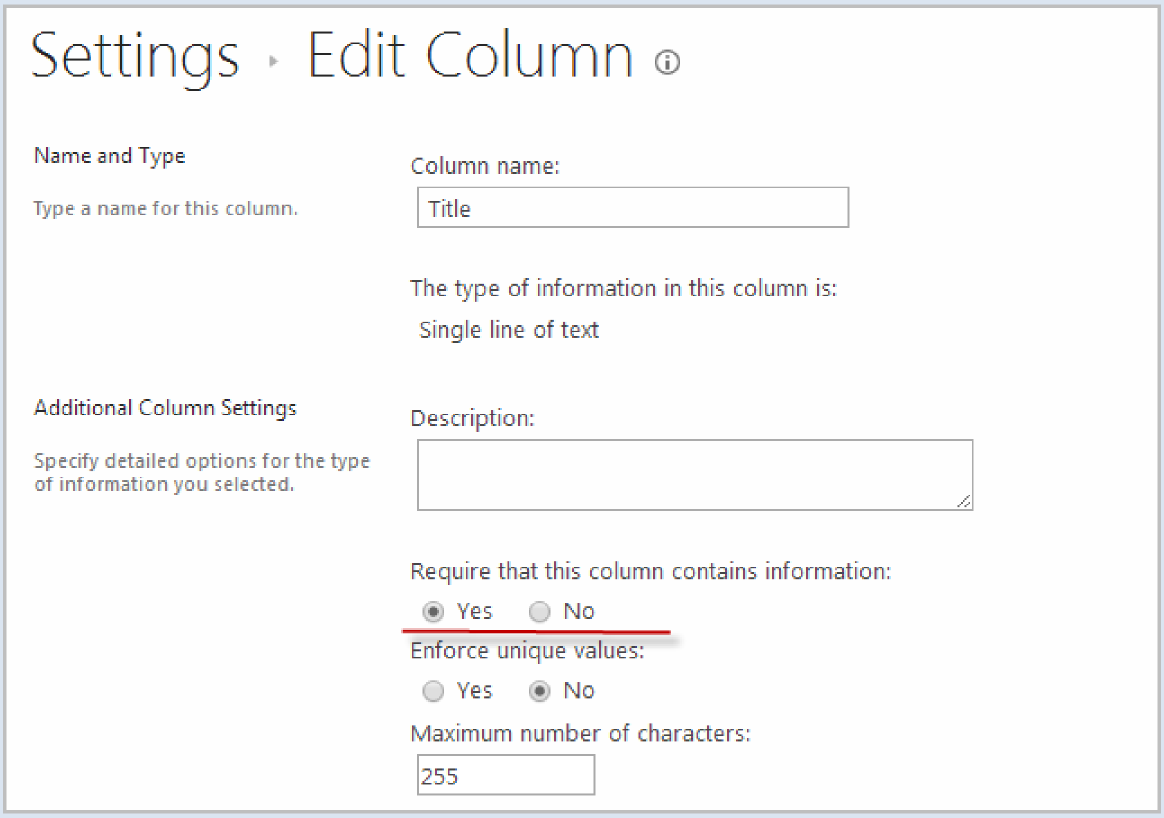


Columns

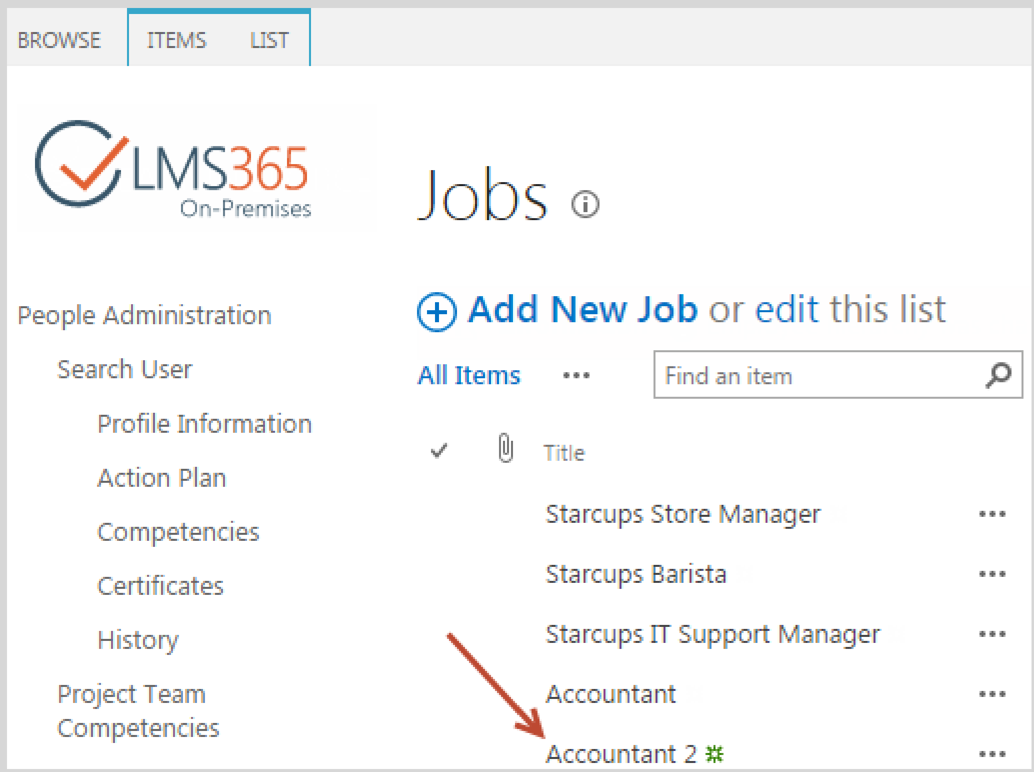
A column stores information about each item in the list. The following columns are currently available in this list:

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:



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.

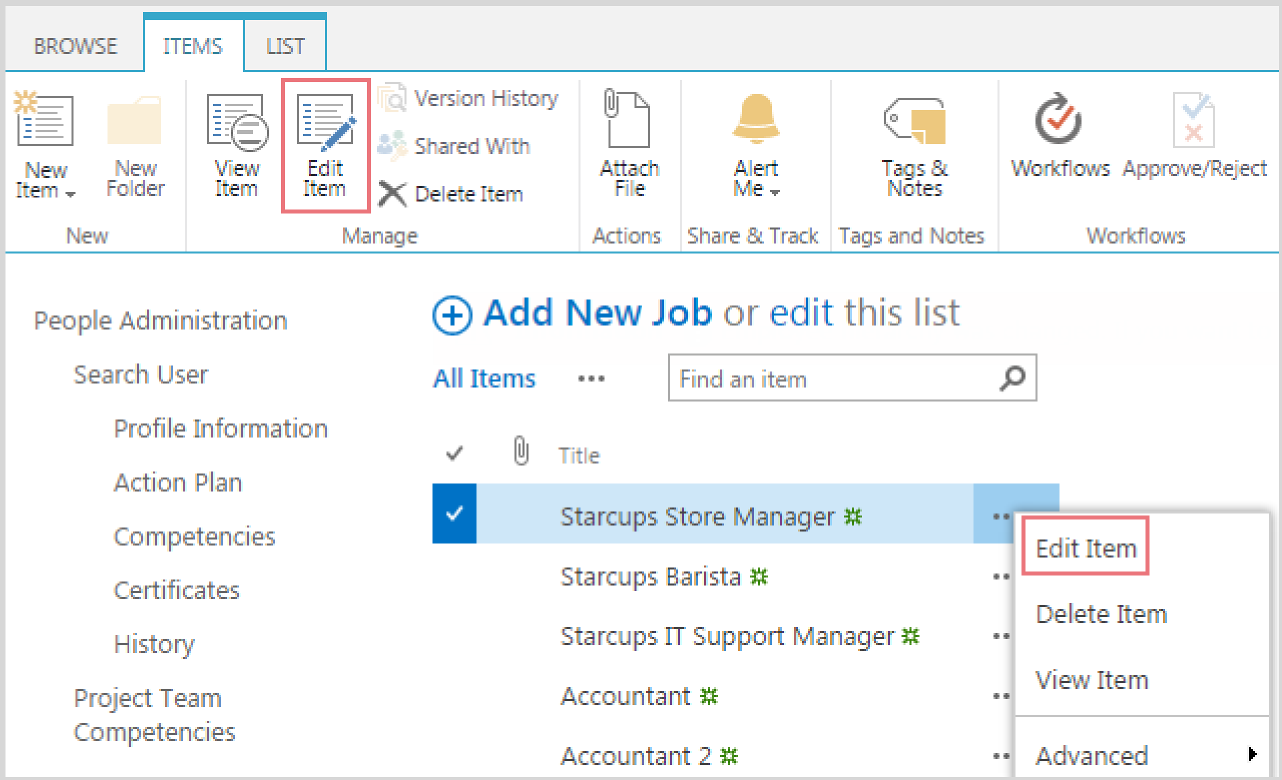
4.6.3 Edit Job

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

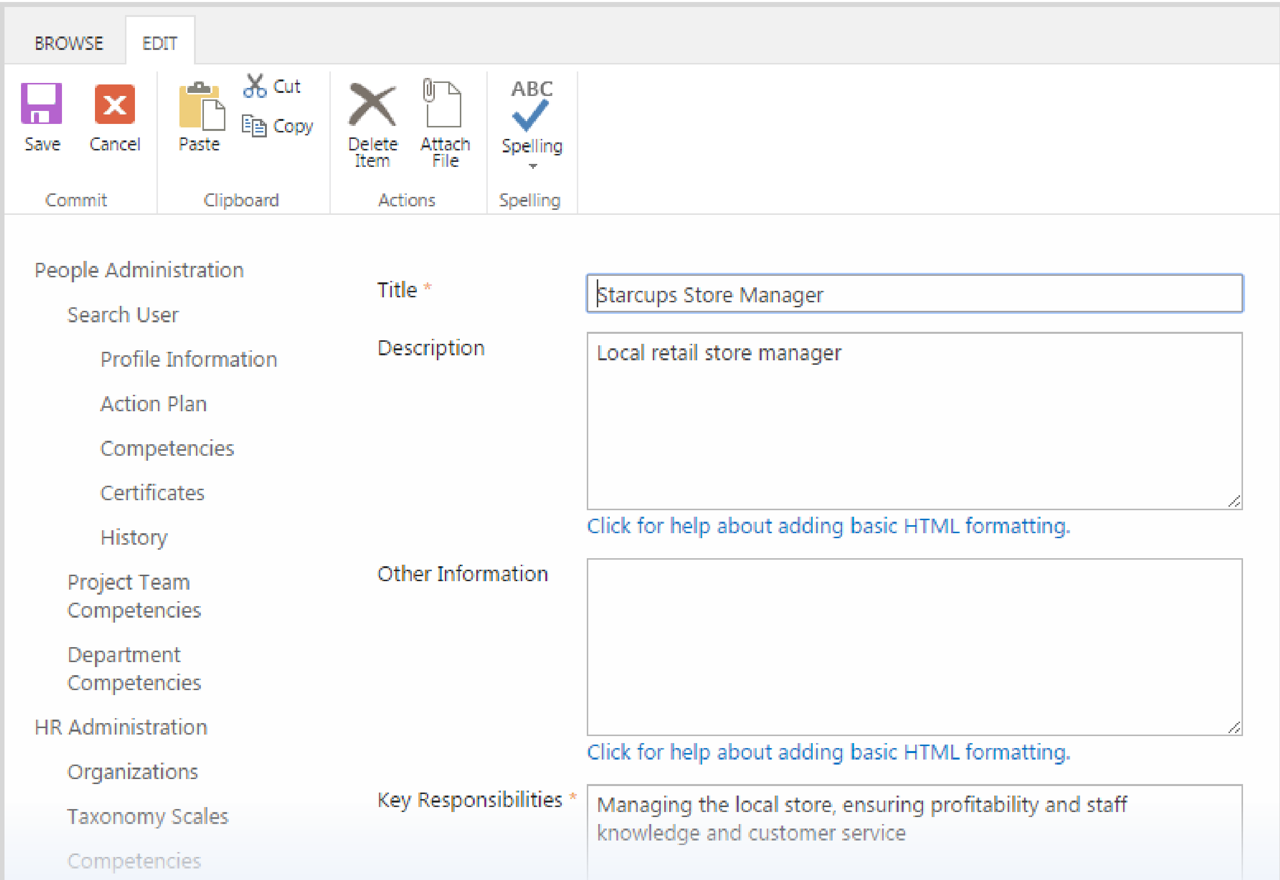
1) Open the Edit form via one of the ways described below:
    a. Click on the Job to select it and from the ribbon choose Edit Item in the Items tab;

OR

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



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



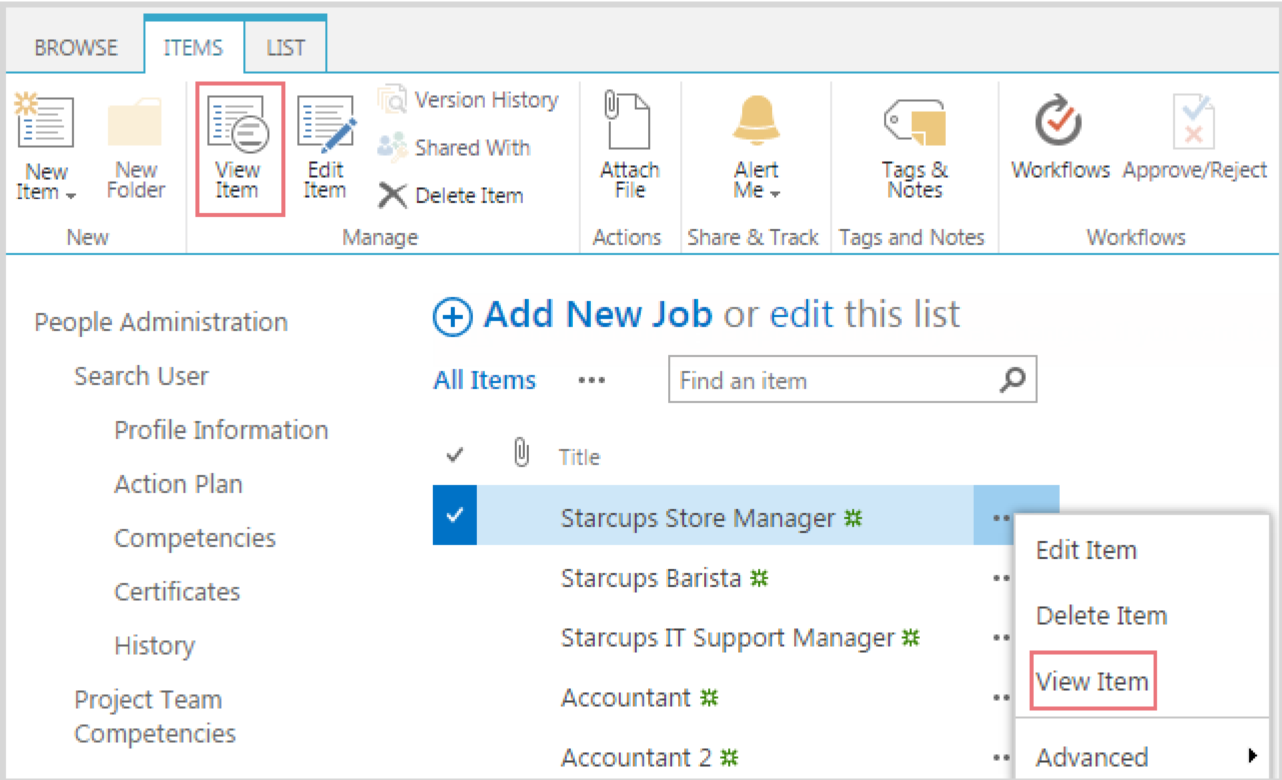
3) Click Save button to save the updates or click Cancel to discard the process.

The user is redirected back to the Jobs list.

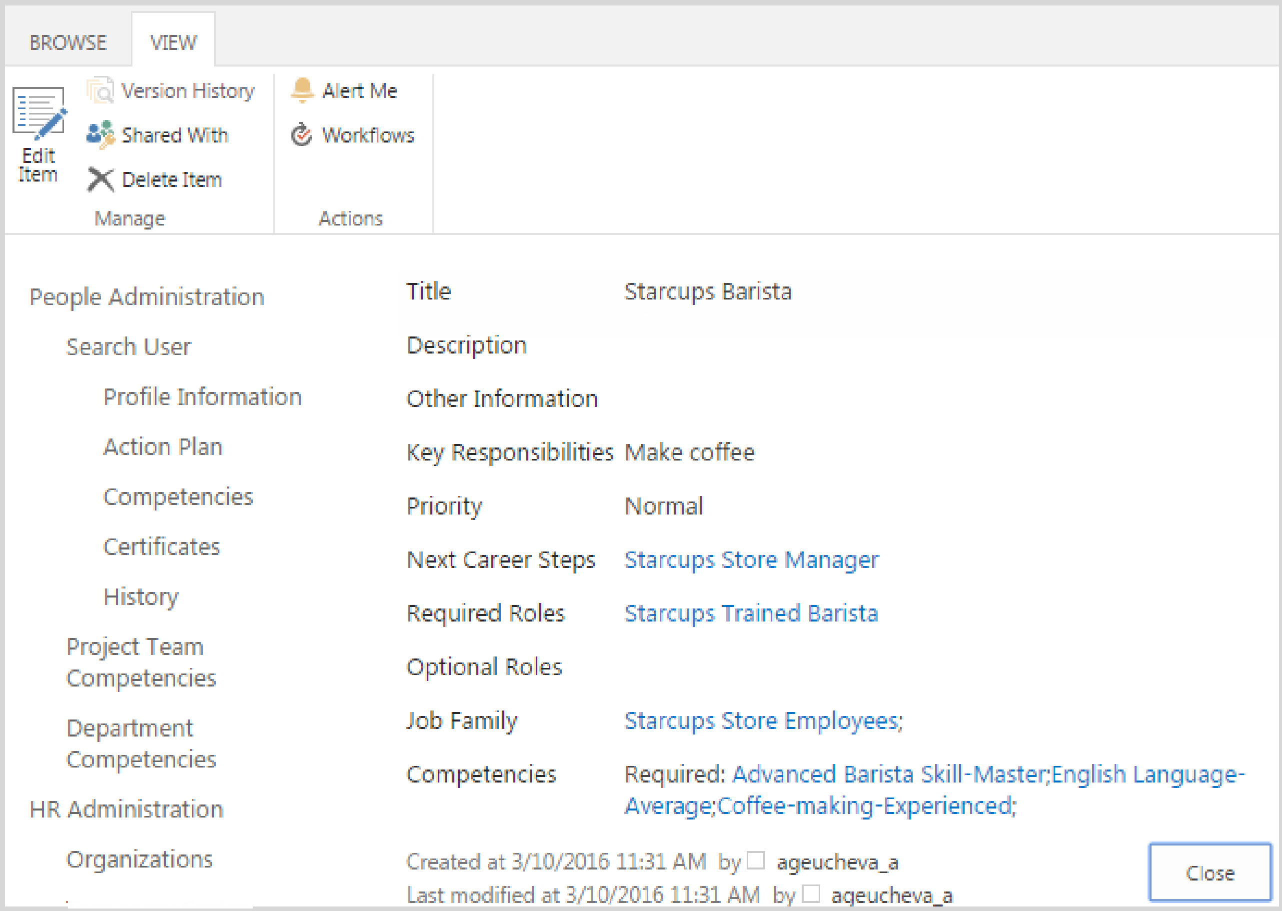
4.6.4 View Job's details

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:

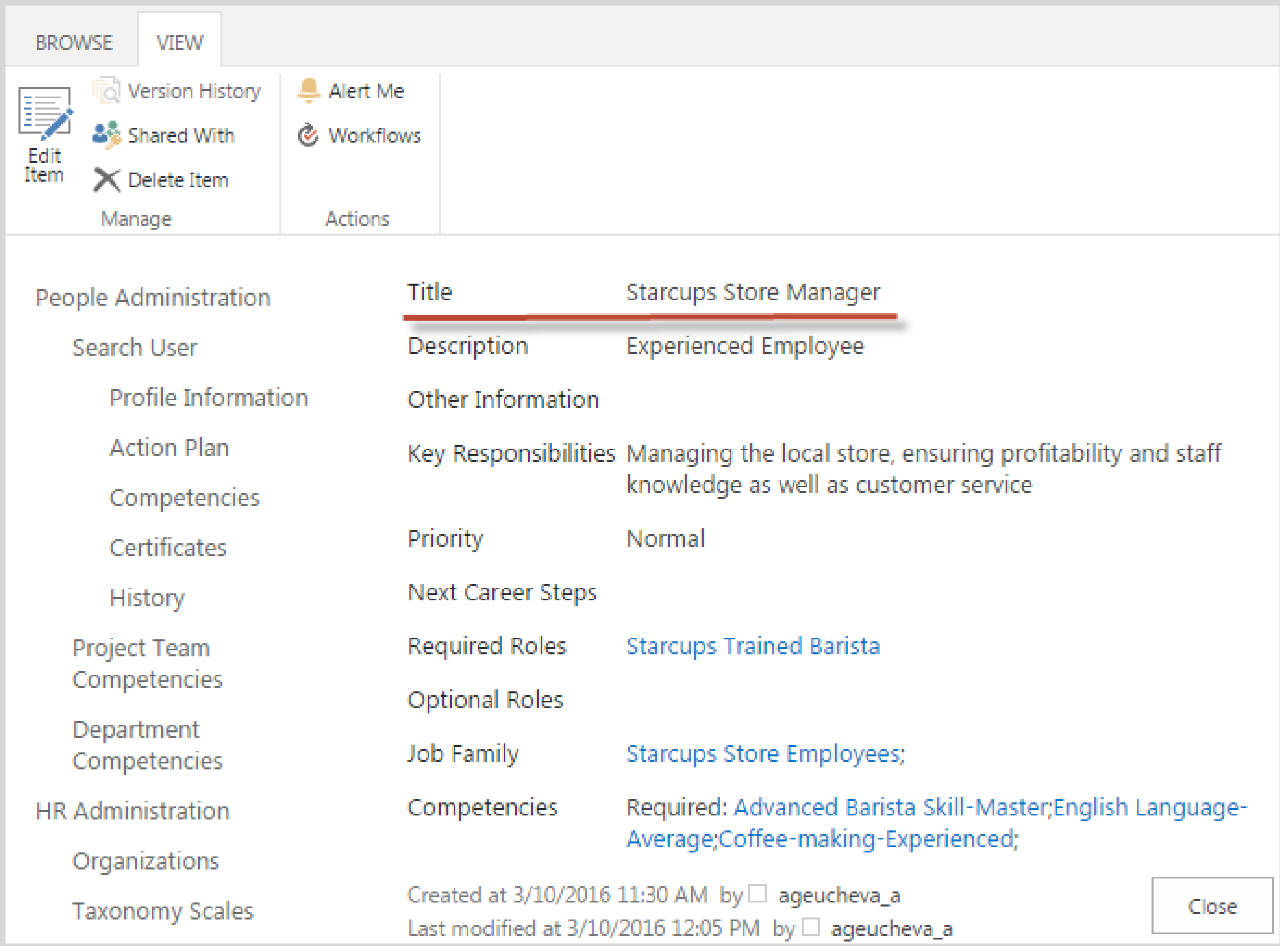


2) The user has an option to also view the detailed information about each item in Next career Steps required Roles and Optional Roles:

   a. Click on the item in the Next career Steps list;

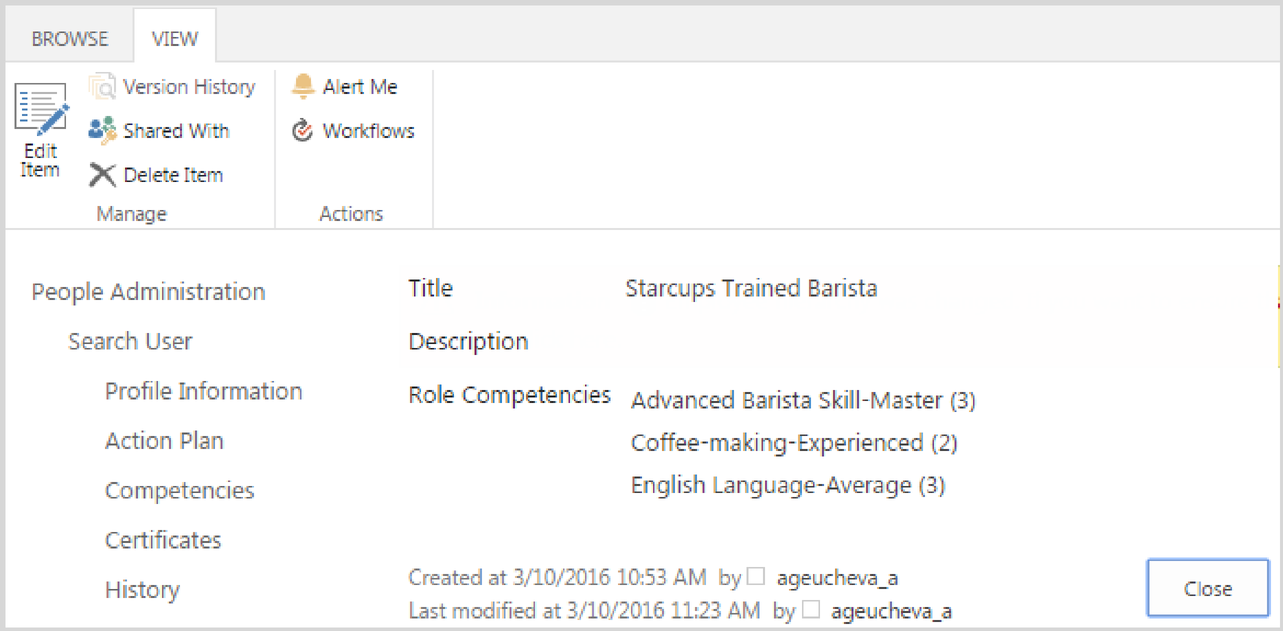
      System will redirect the user to the page with the detailed information about the selected Job.

      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:



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.

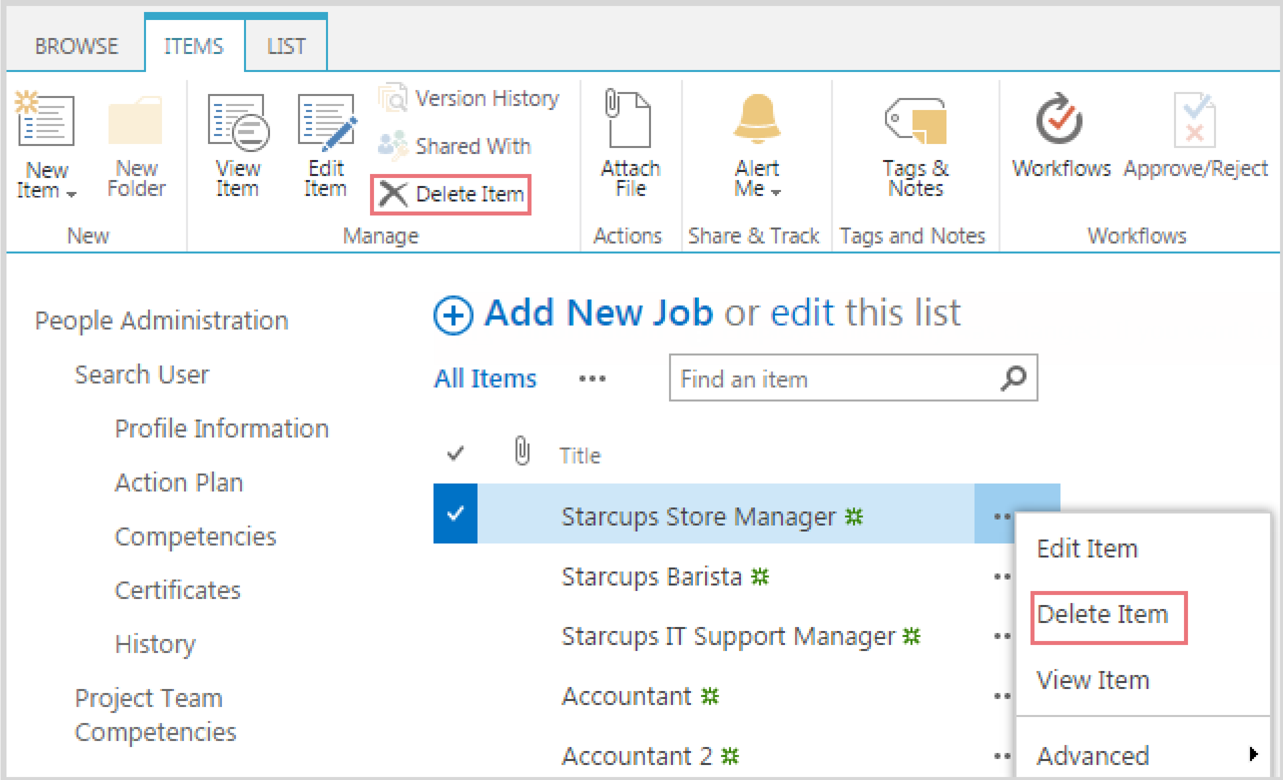
4.6.5 Delete Job

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

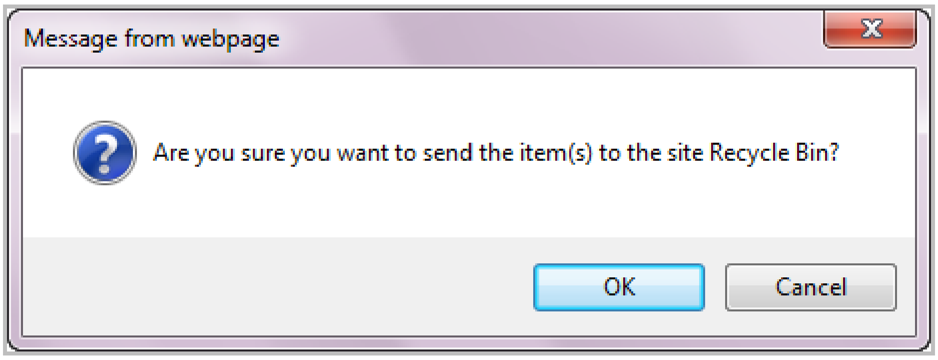
1) Click Delete Item either
   a. From the drop-down action list next to the Job's name

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

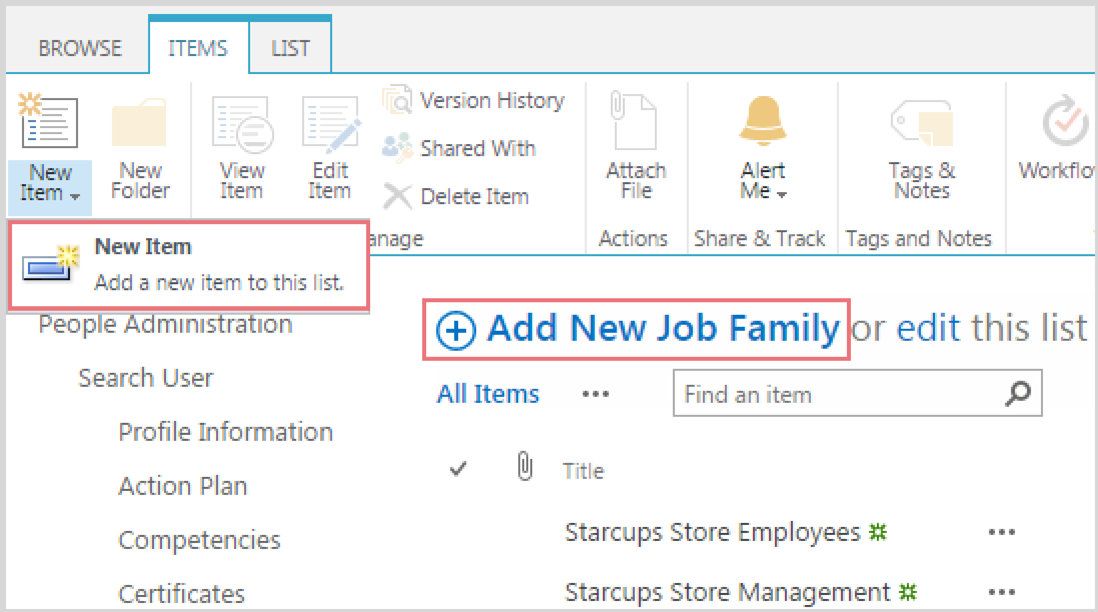
In order to add the new Job Family, Global Administrator should follow the steps below:

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

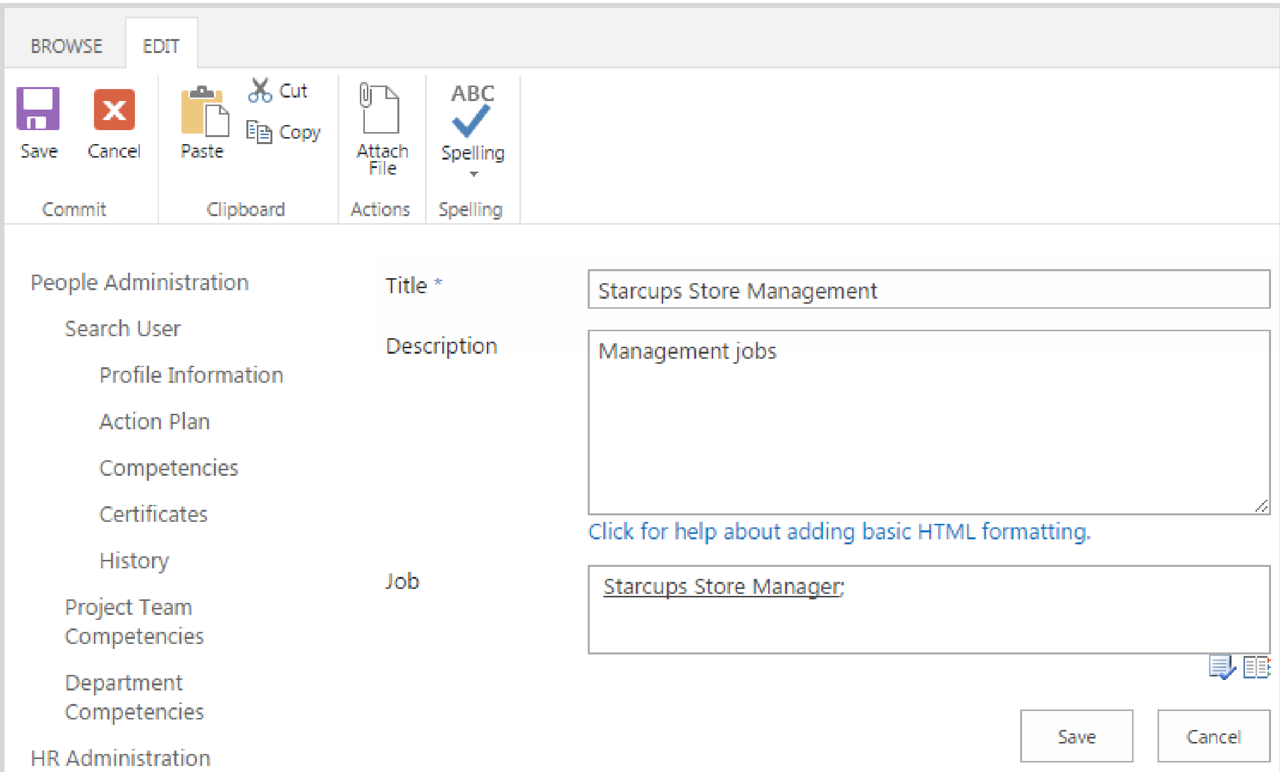
   a. From the Job Families list click Add New New Job Family button ;

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.

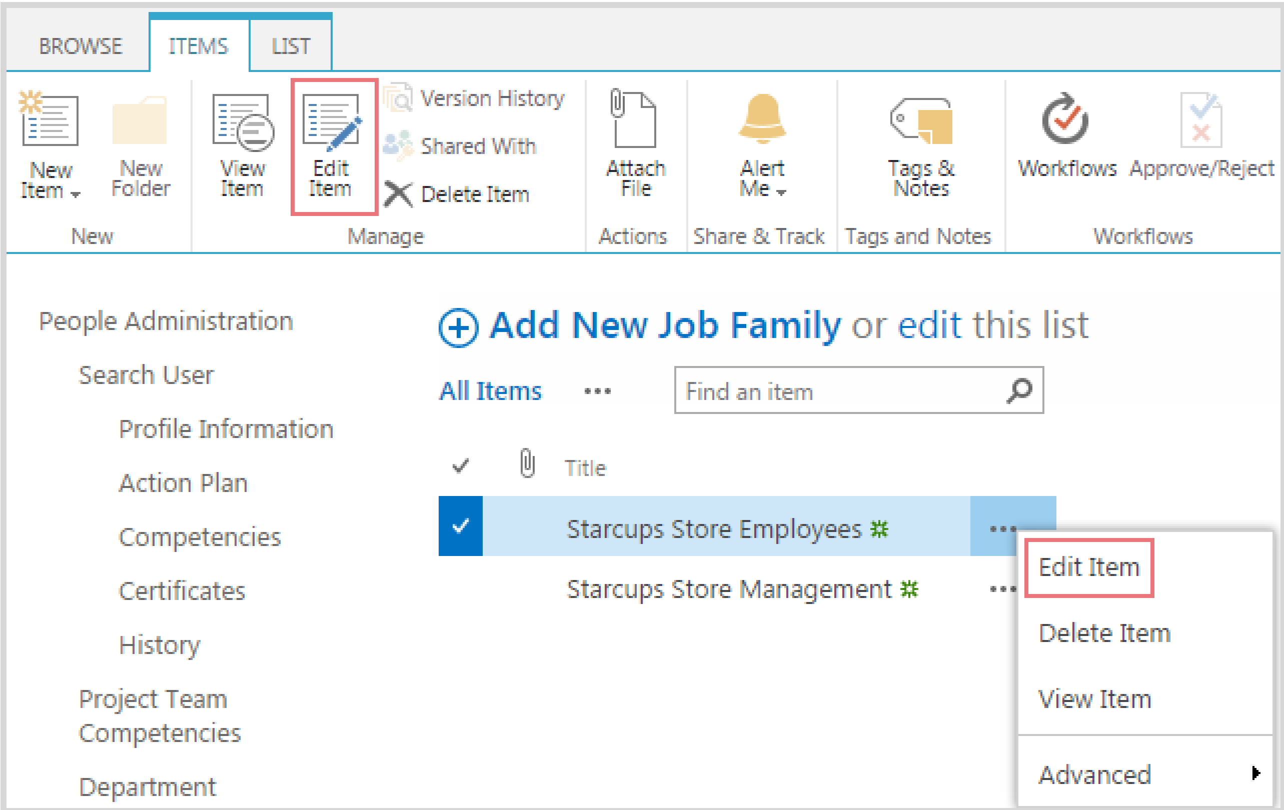
4.7.2 Edit Job Family

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

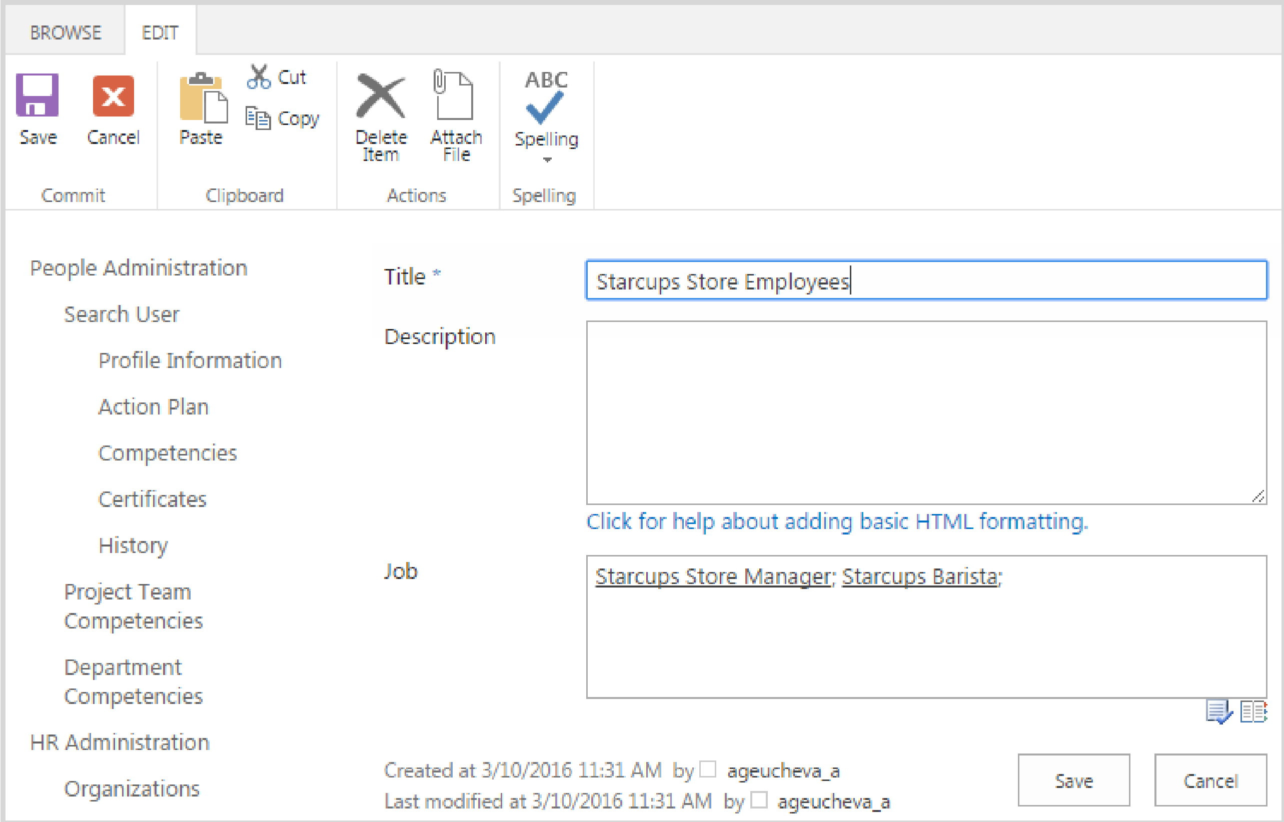
1) Open the Edit form via one of the ways described below:
   a. Click on the Job Family to select it and from the ribbon choose Edit Item in the Items tab;

OR

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



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

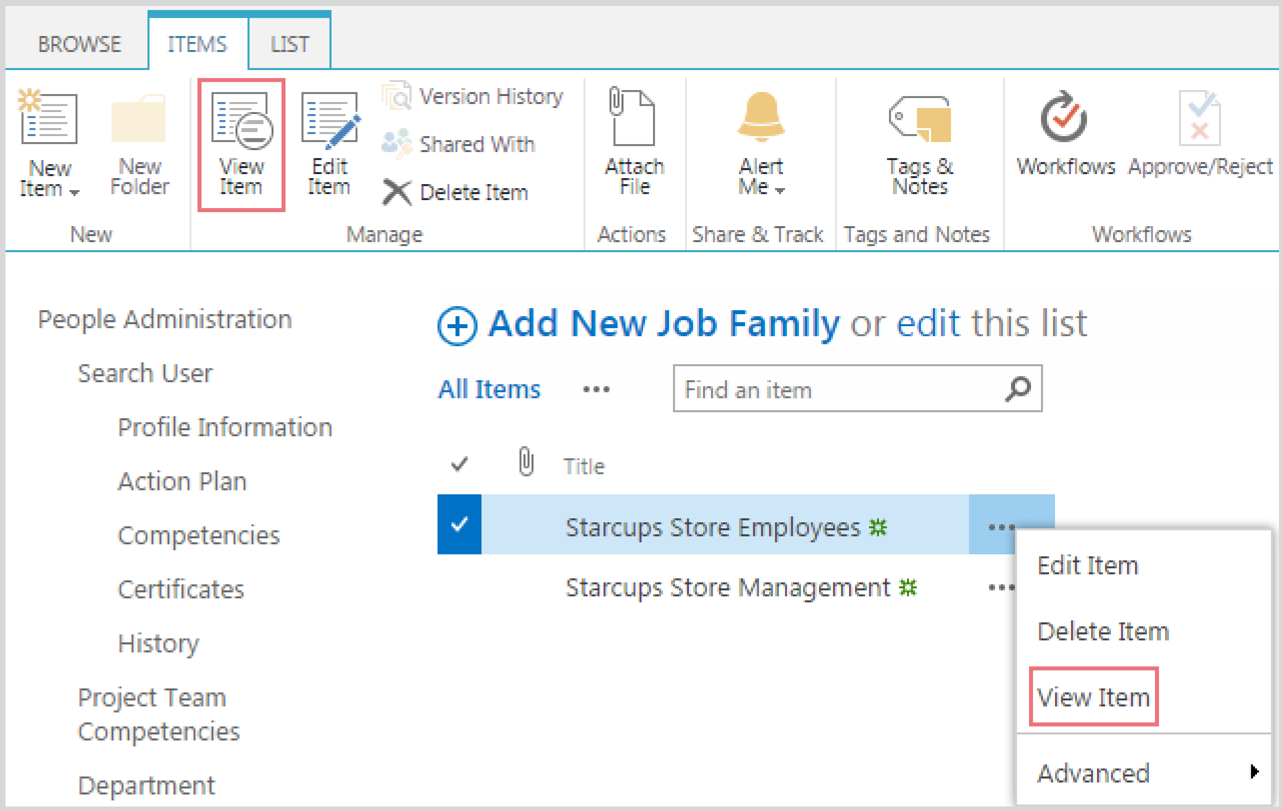


3) Click Save button to save the changes made to the Job Family or click the Cancel button to discard the process.

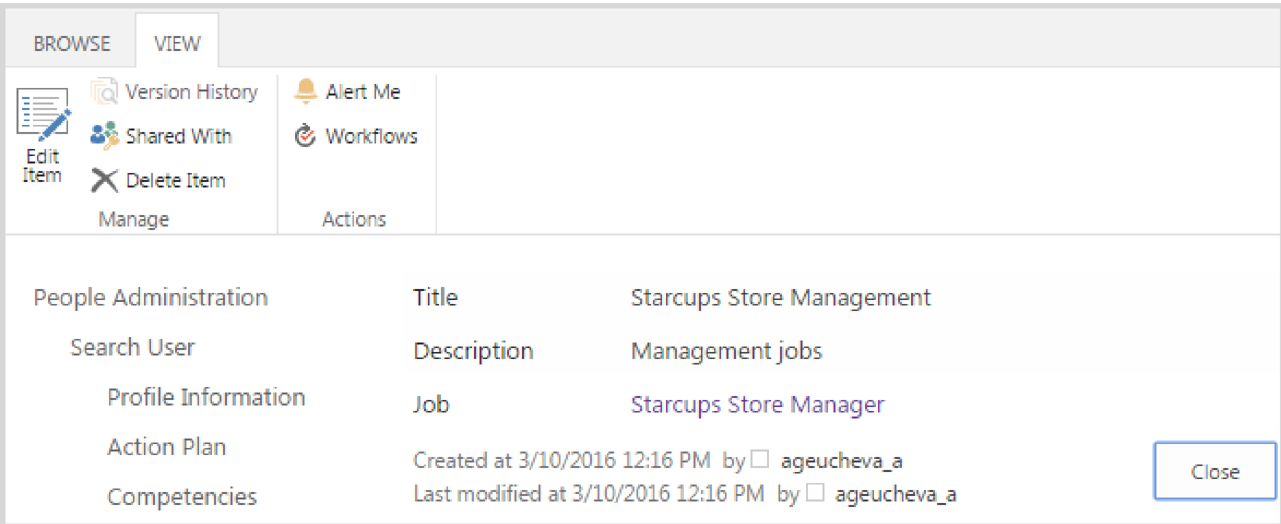
4.7.3 View Job Family's details

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

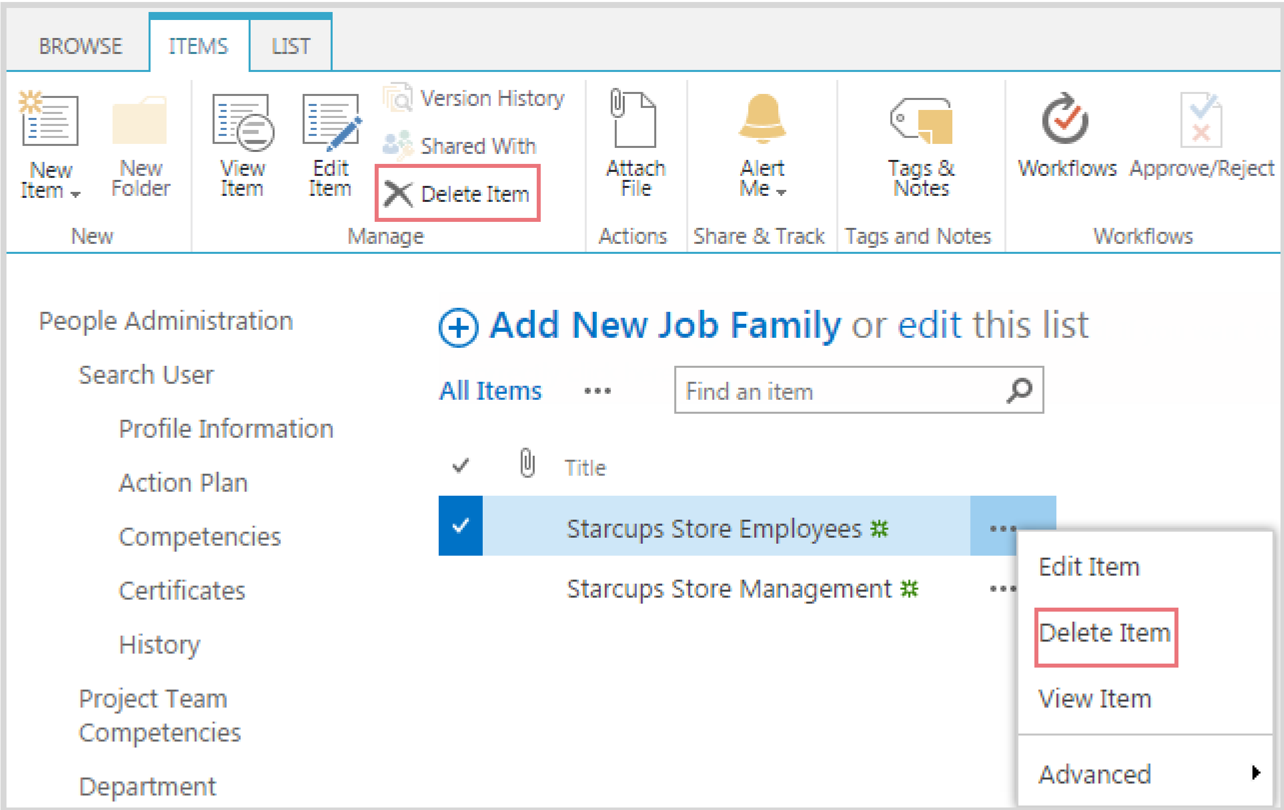
To remove the Job Family from the Job Families list, the Global Administrator should follow the steps below:

1) Click Delete Item either:

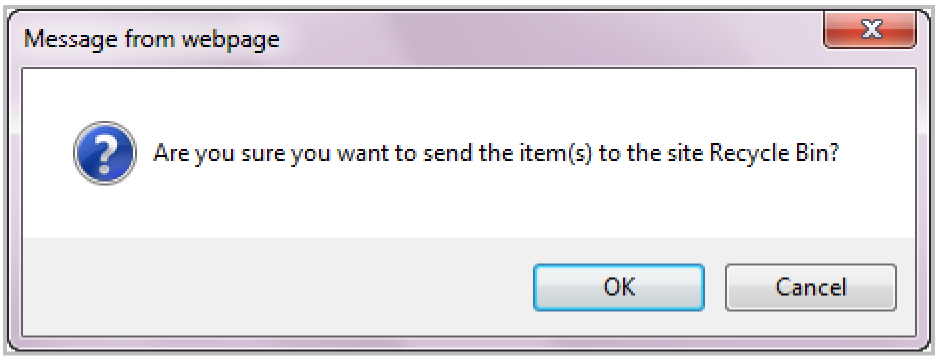
    a. From the drop-down action list next to the Job family's name;

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.

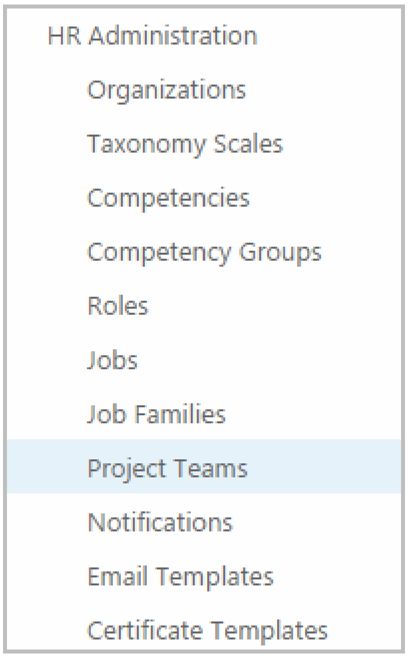
NOTE:

- 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

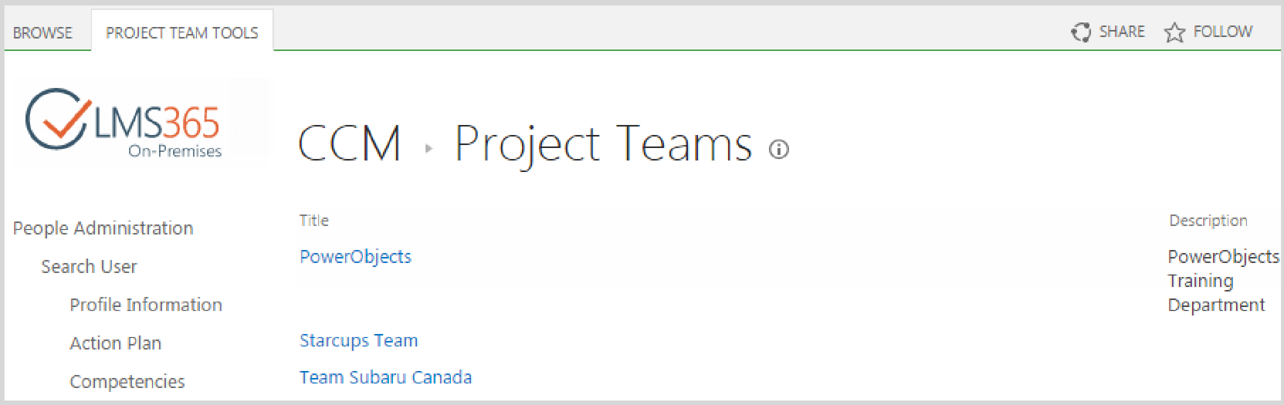
4.8 Project Teams

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.

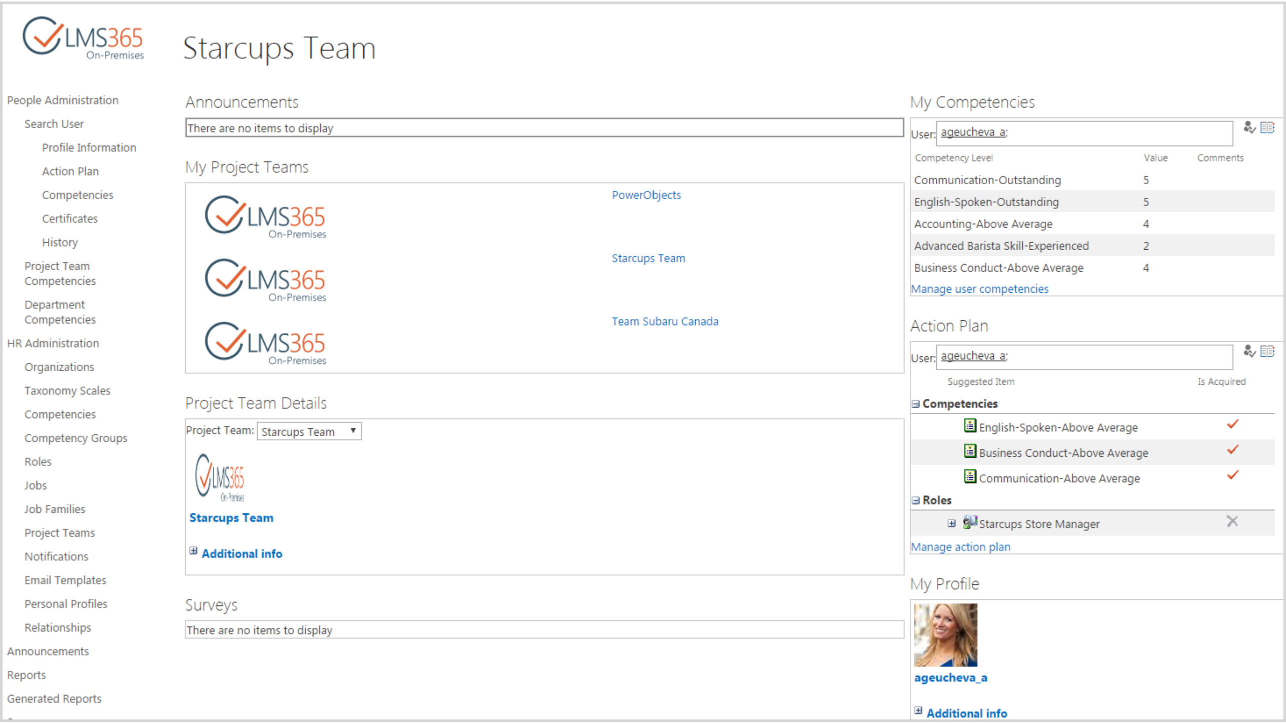
To view the list of all Project Teams, the User clicks on Project Teams link in the Quick Launch menu in HR Administration:



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



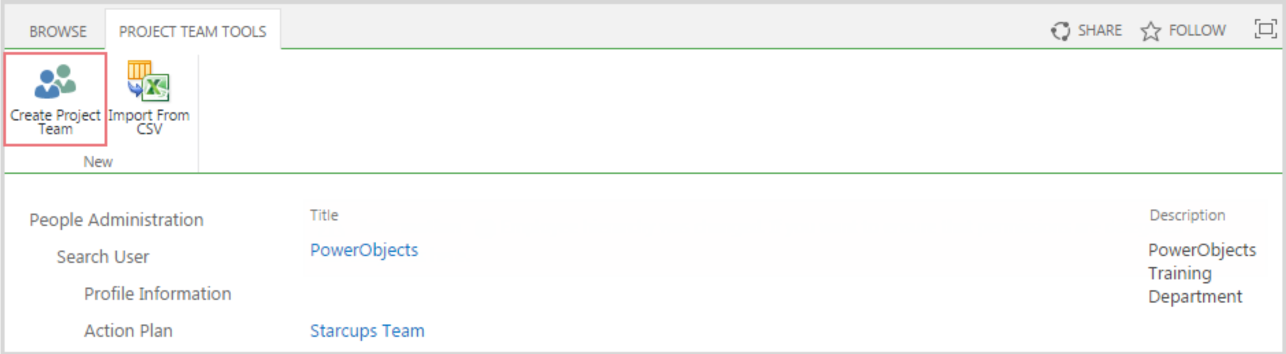
Click on the Project Team's title to go to the selected Project Team's Home page page and that Project Team is selected in the Project Team Details web part:



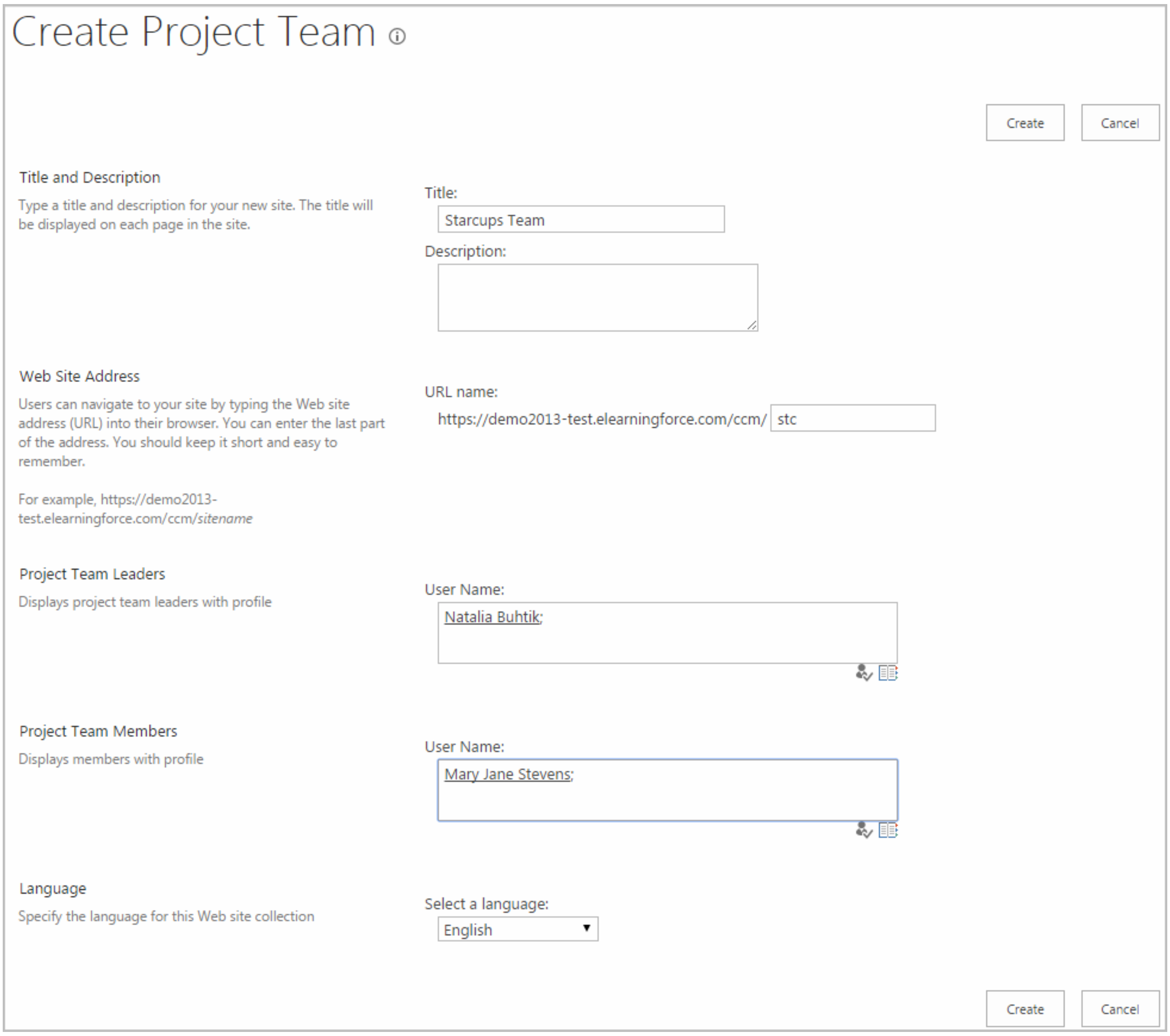
4.8.1 Create Project Team

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:



2) The following window will appear:

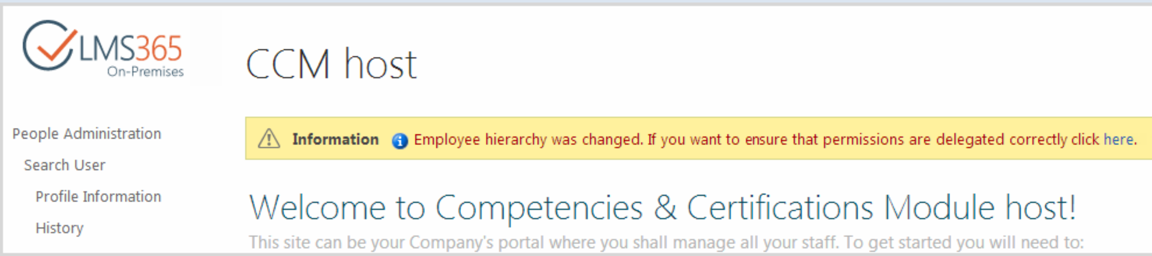


3) Fill in all the necessary information about the new Project Team:
- Title – name of the new Project Team that will be displayed on each page within the site;
- Description – short description of the new Project Team;

- 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 broweser. 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:



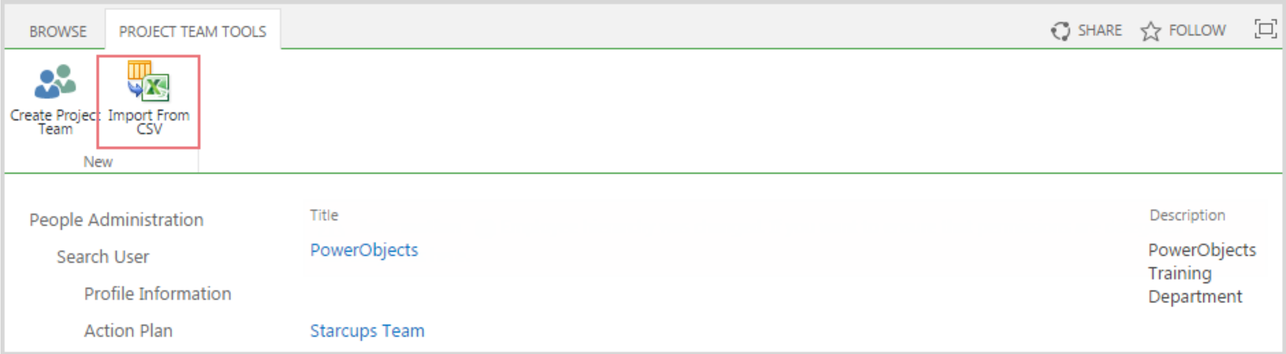
Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.8.2 Import Project Team

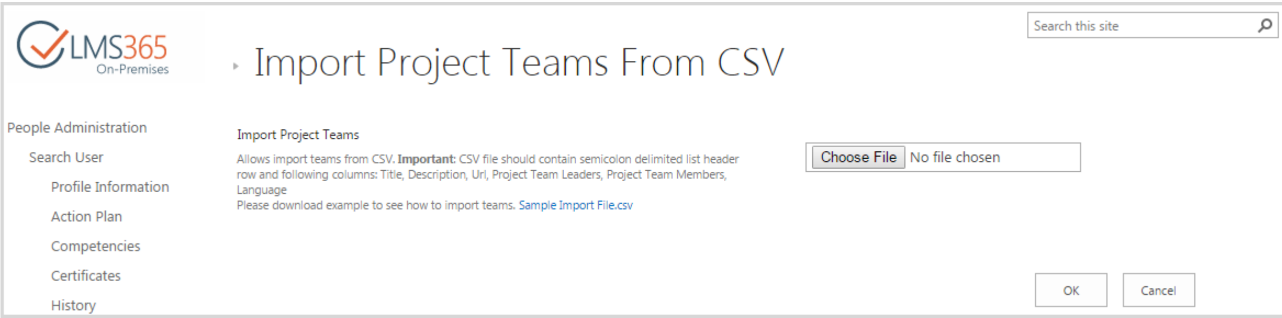
It is possible to import data from .csv file for the Project Team item. The process of importing Project Team is described below:

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:

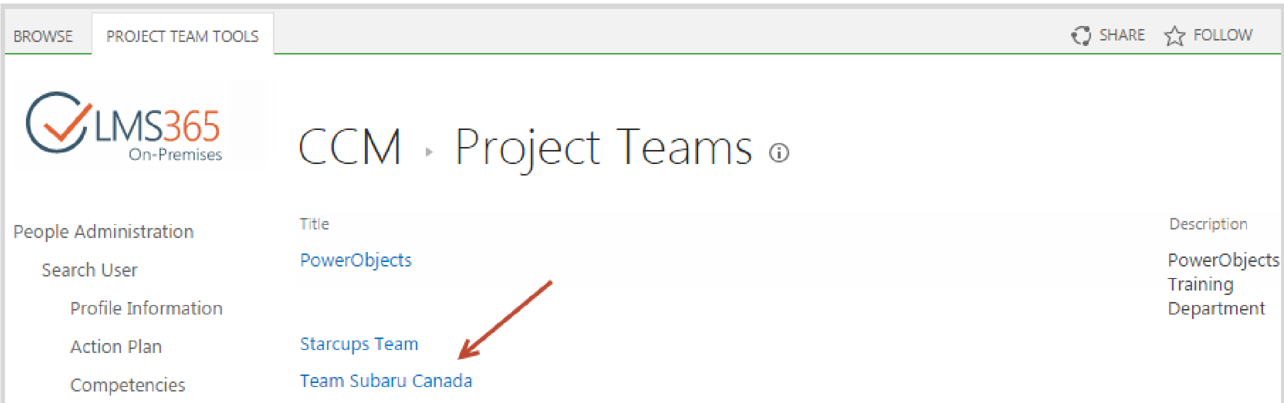


2) Select a .csv file from your computer for upload:



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:

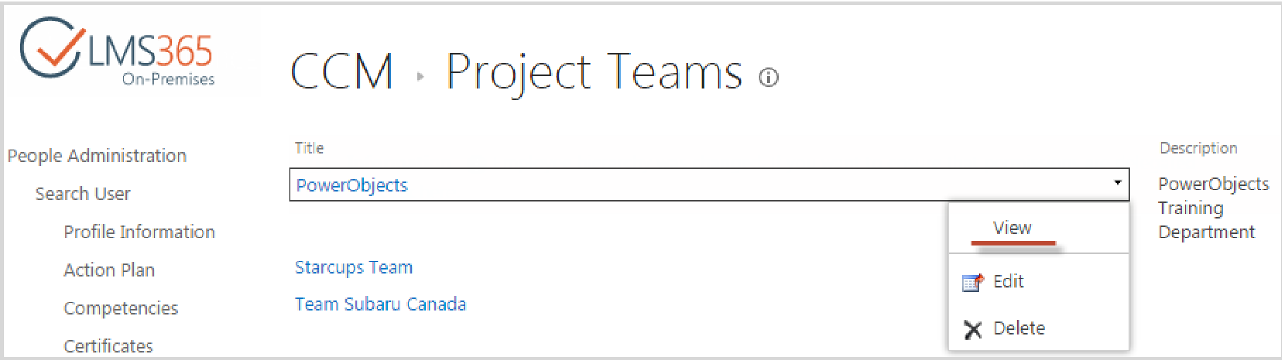


NOTE:	If import file contains data for several items and there is some incorrect value in one item, then correct items will be uploaded. Project Team with incorrect data will be not uploaded and error will be displayed at the end of action.
NOTE:	If imported Project Team duplicates title of already existing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

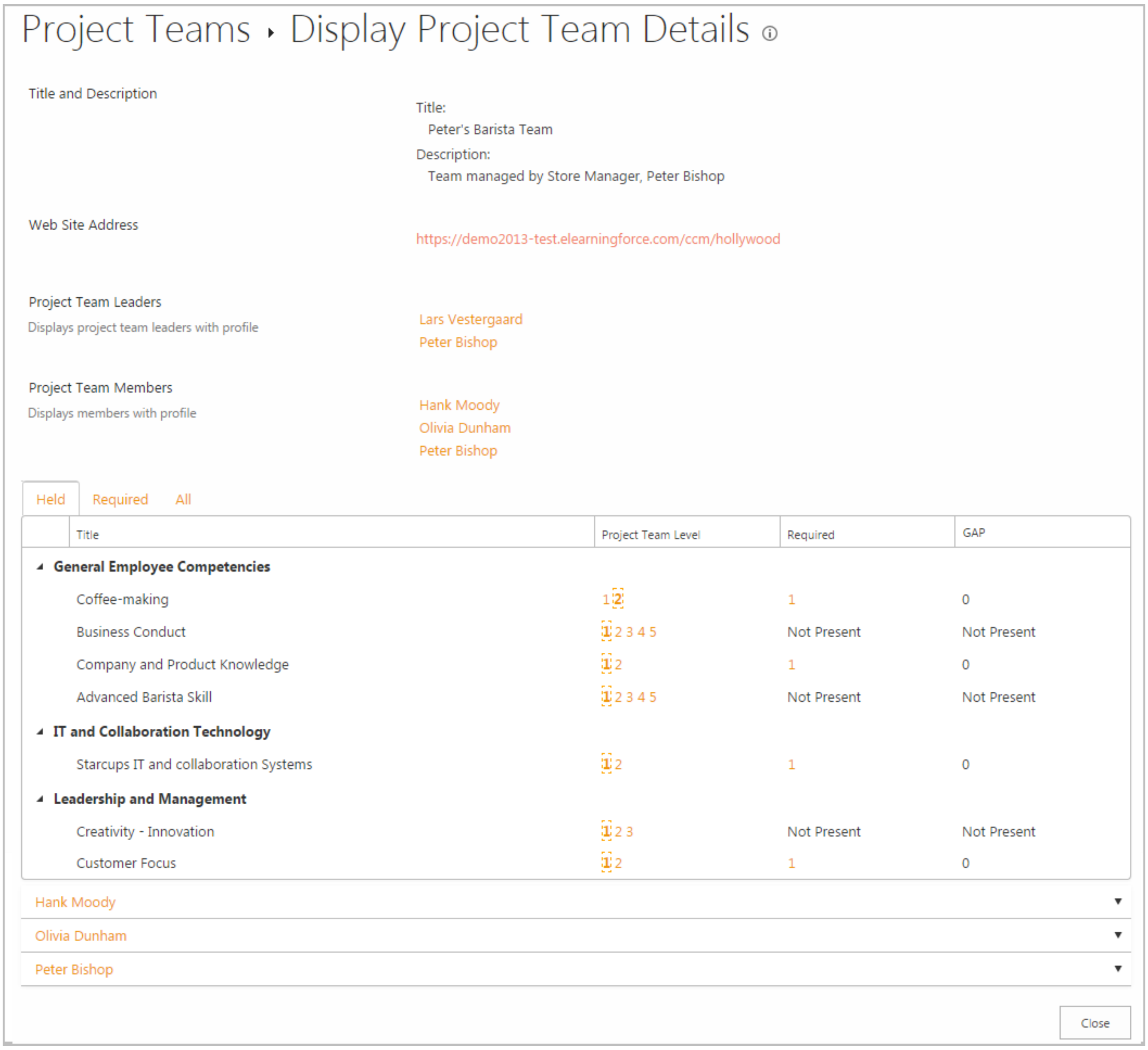
4.8.3 View Project Team's metadata

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:



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.

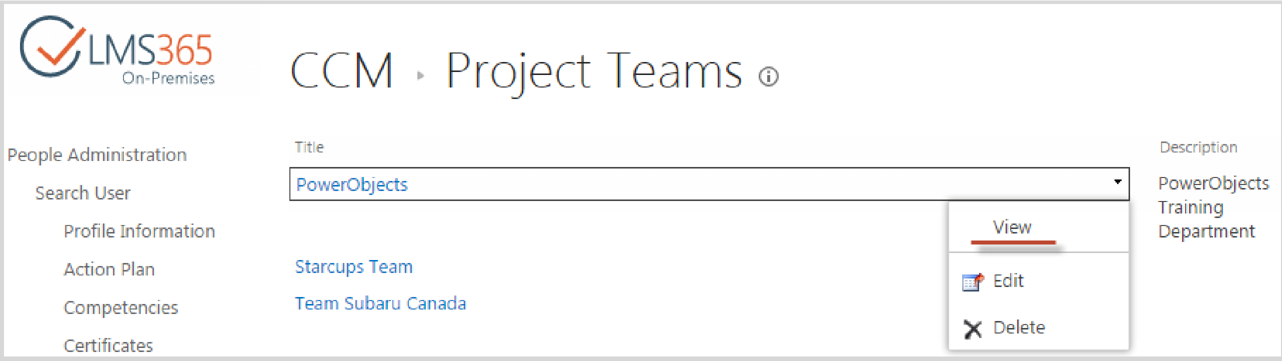
3) Click Cancel button to go back to Project Teams page.

4.8.4 Edit Project Team's metadata

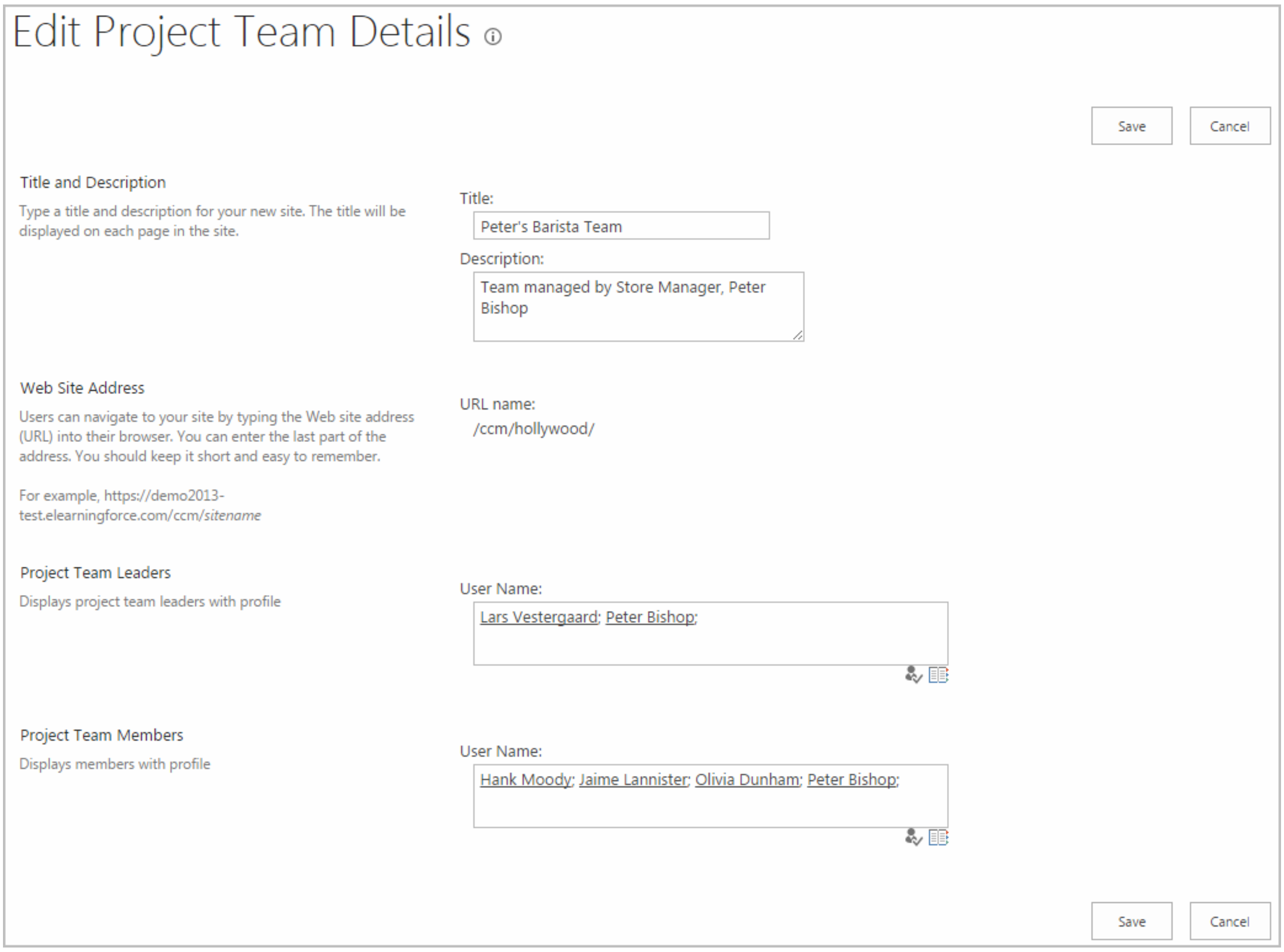
To modify the Project Team's metadata, the User goes through the following steps:

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:



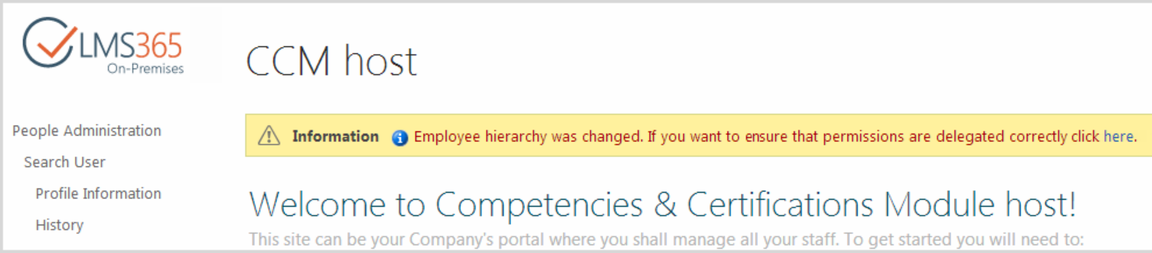
You will be redirected to the Edit Project Team page:



- 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:

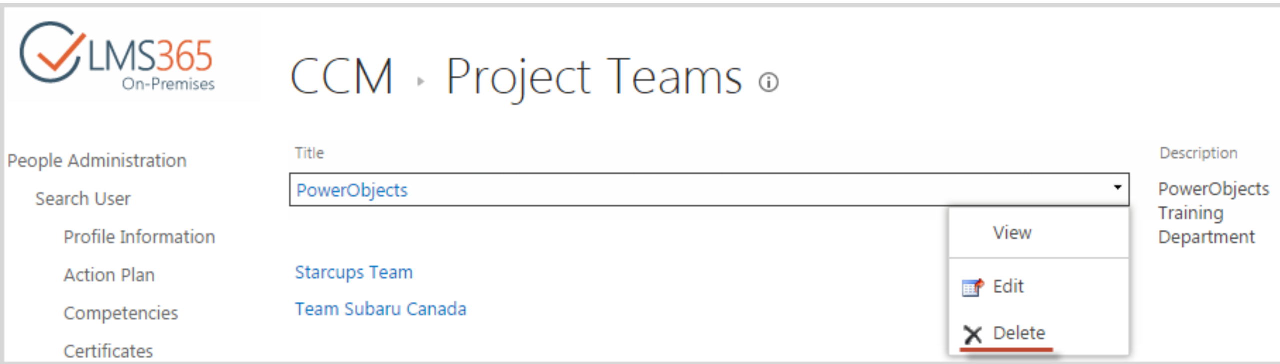


Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

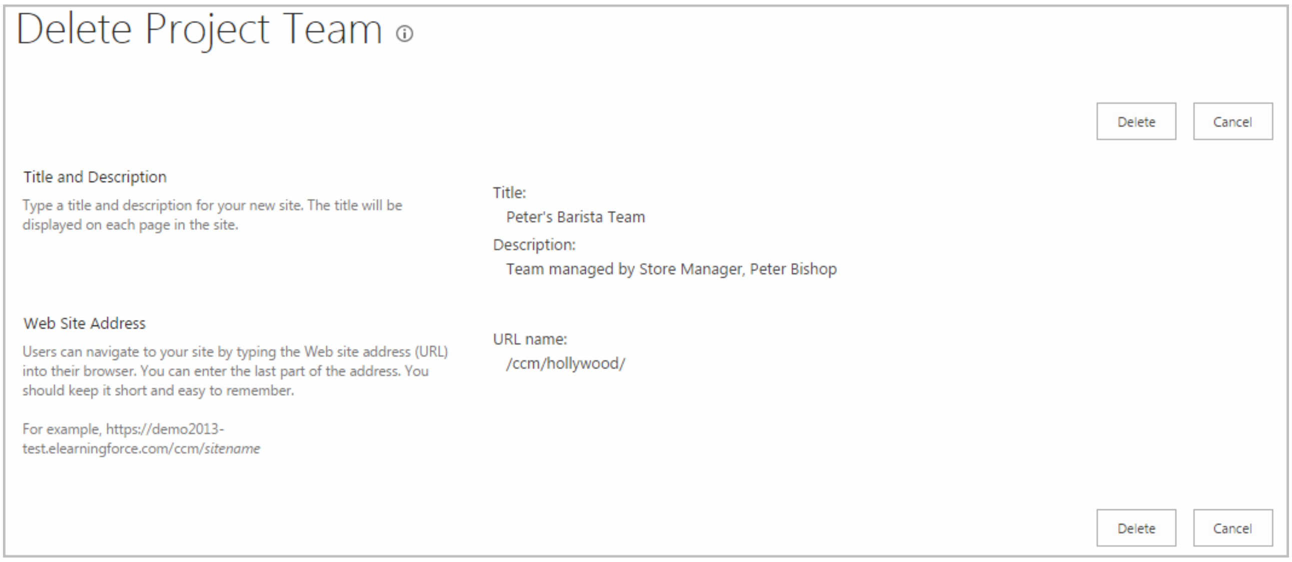
4.8.5 Delete Project Team

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:

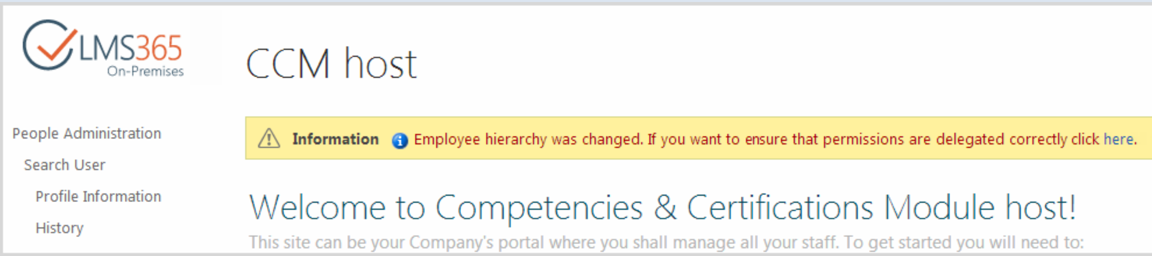


You will be redirected to the Delete Project Team page:



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.

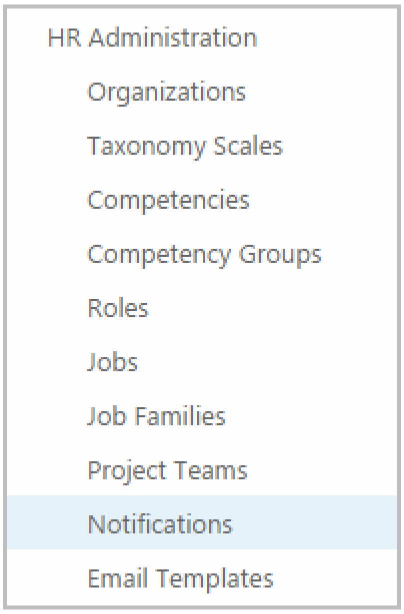
SharePoint CCM provides an ability to set Notifications on the Certification instance events (certification issued, certification is about to be expired, certification expired, and certification suspended) which defines what Email Templates will be sent to what managers from employee's subordination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

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

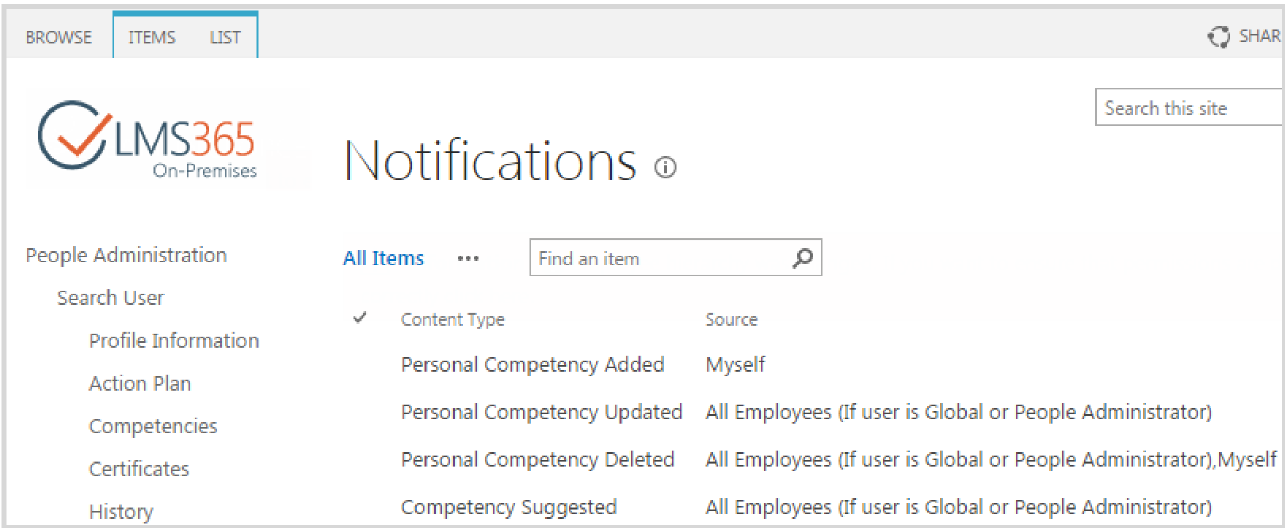
4.9.1 Add Notification

To add a new Notification, follow these steps:

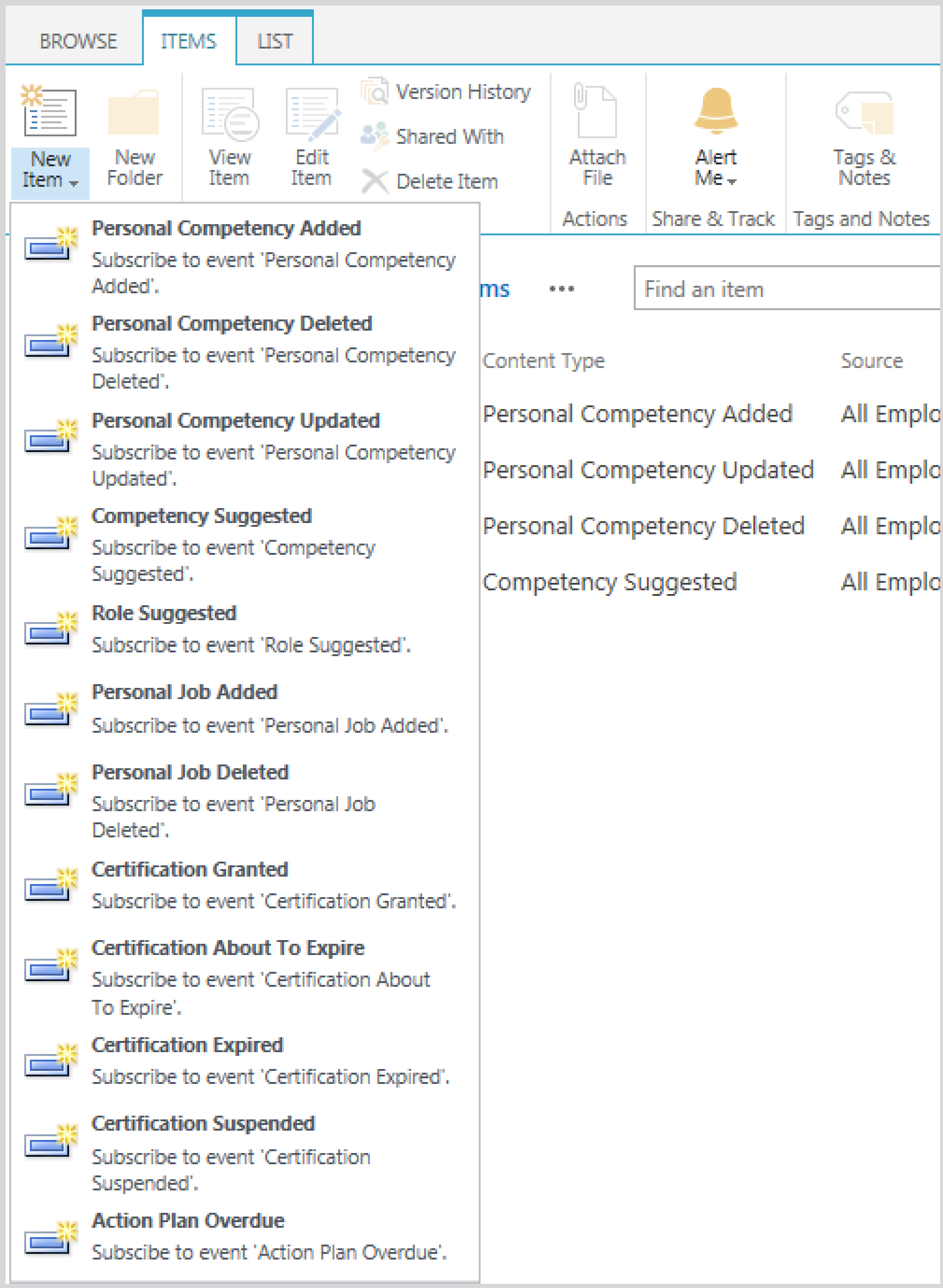
1) On the Quick Launch menu in HR Administration section click Notifications:



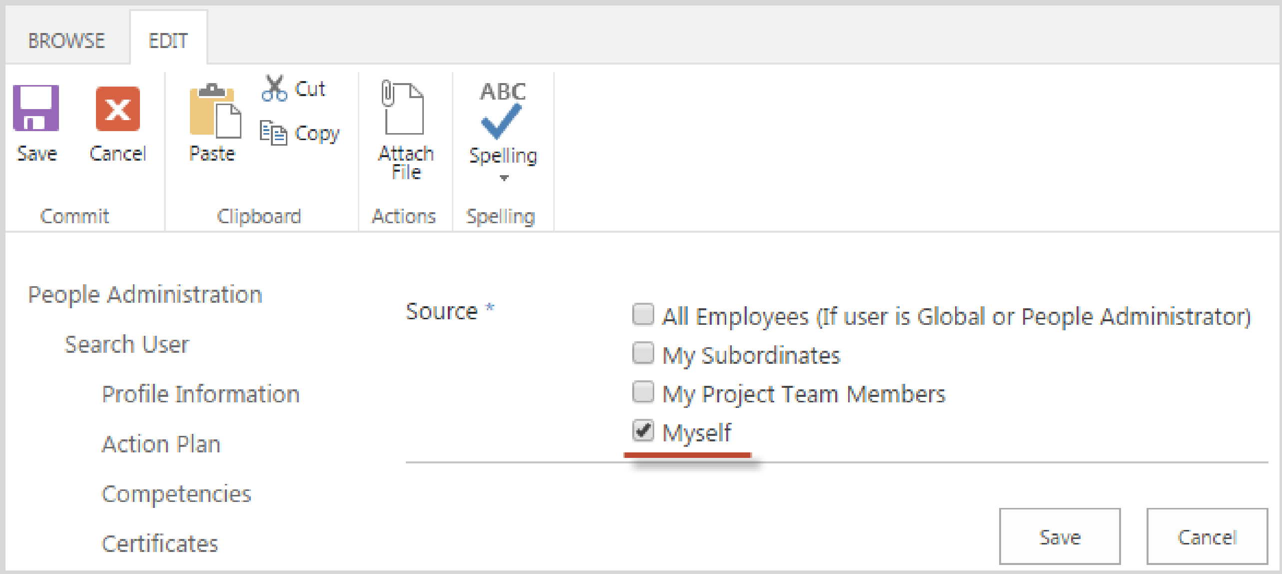
2) You will be redirected to Notifications list. The Notifications will be sorted by Content Type and Source:



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



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



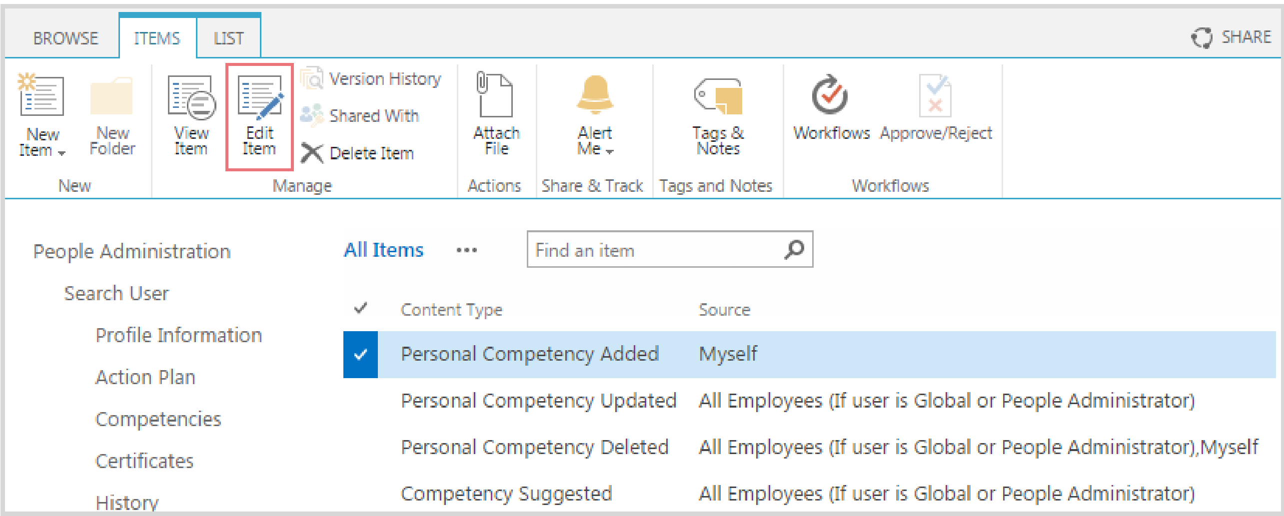
5) Click Save button to create a new Notification or click Cancel button to discard the changes.

You will be redirected to the Notifications list, where newly added Notification will be displayed.

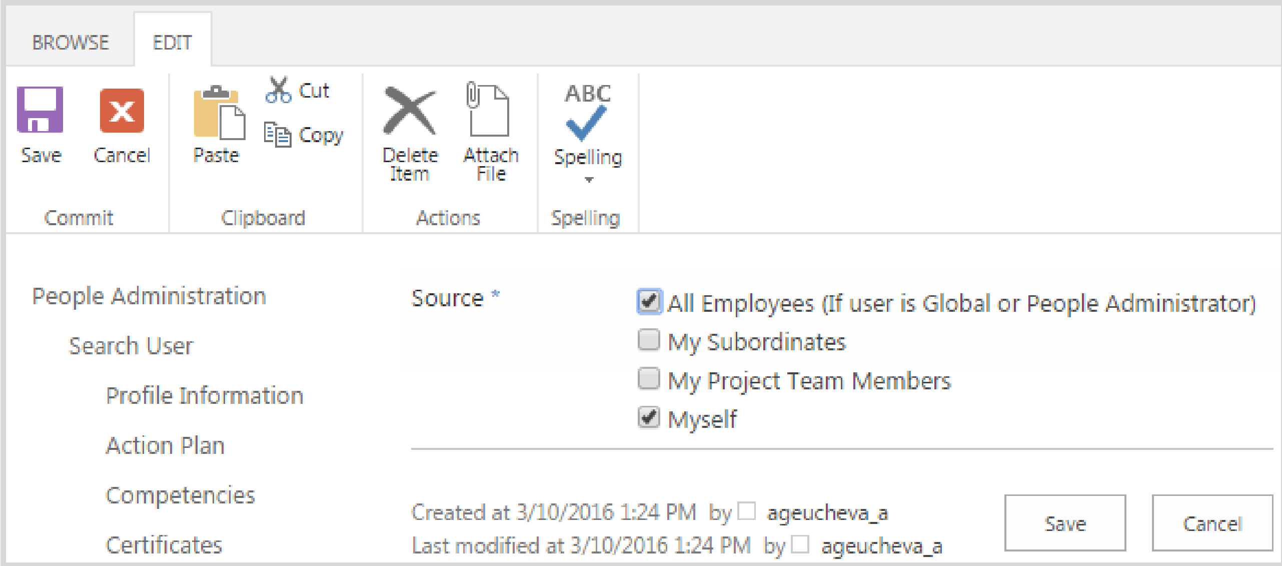
4.9.2 Edit Notification

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:



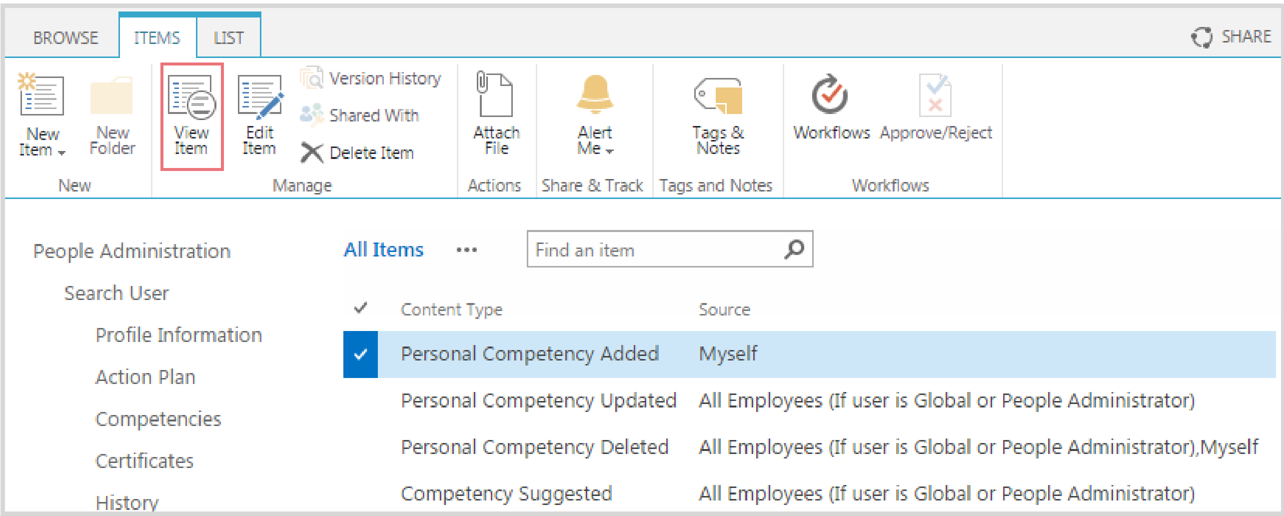
4) Click Save button to save the changes OR click Cancel button to discard the changes.

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

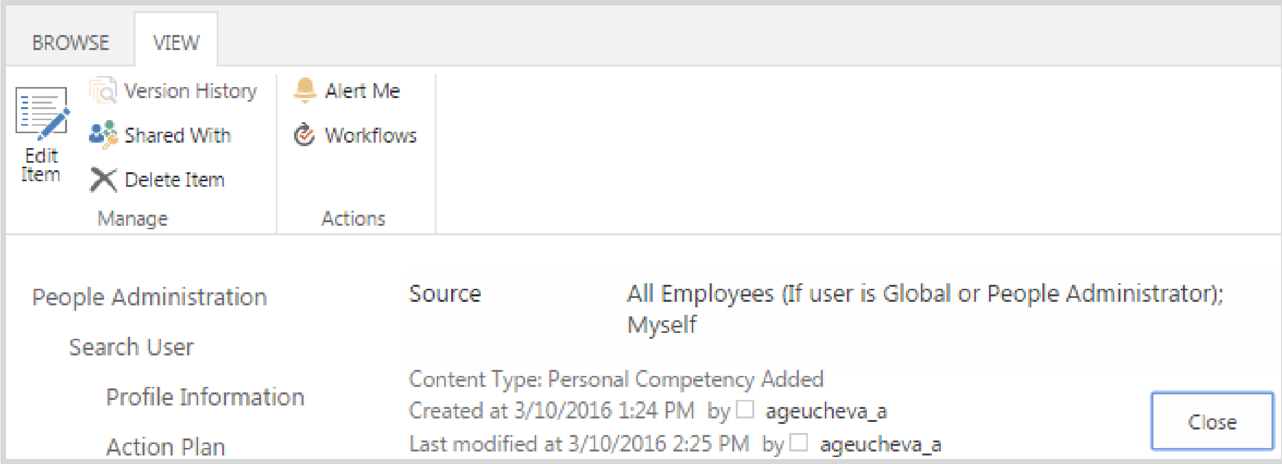
4.9.3 View Notification's metadata

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:



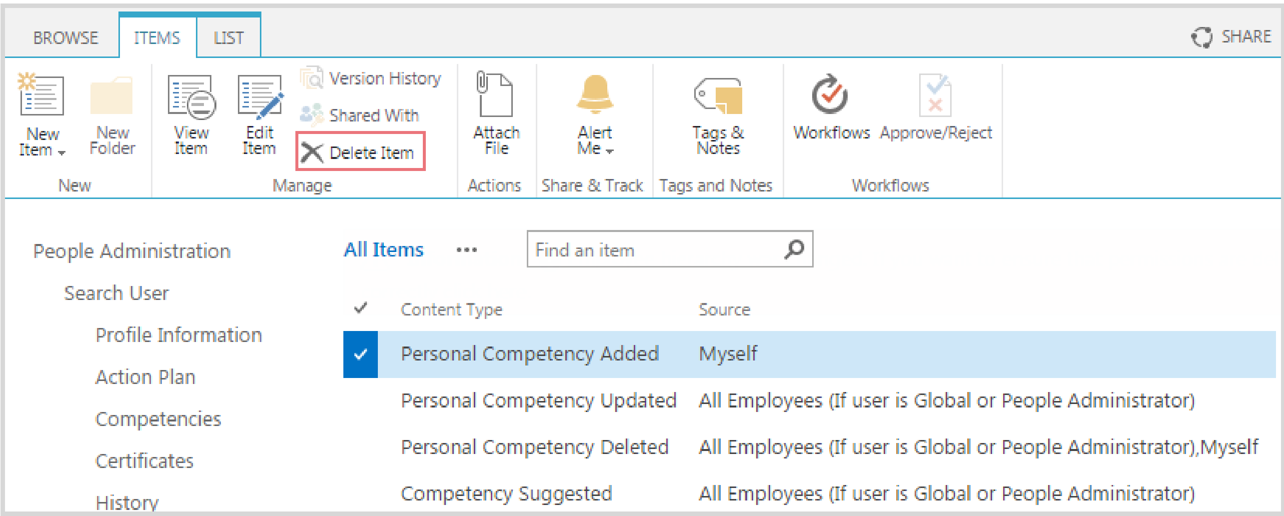
4) Click Close button to close the window and return to the Notifications list.

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).

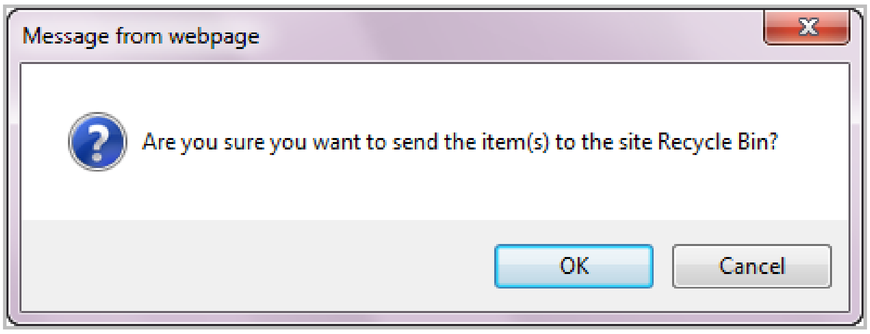
4.9.4 Delete Notification

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.

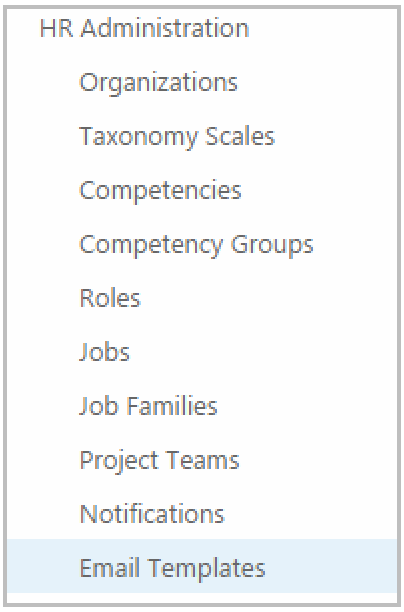
Email template for notifications for the following events can be customized:

- 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:



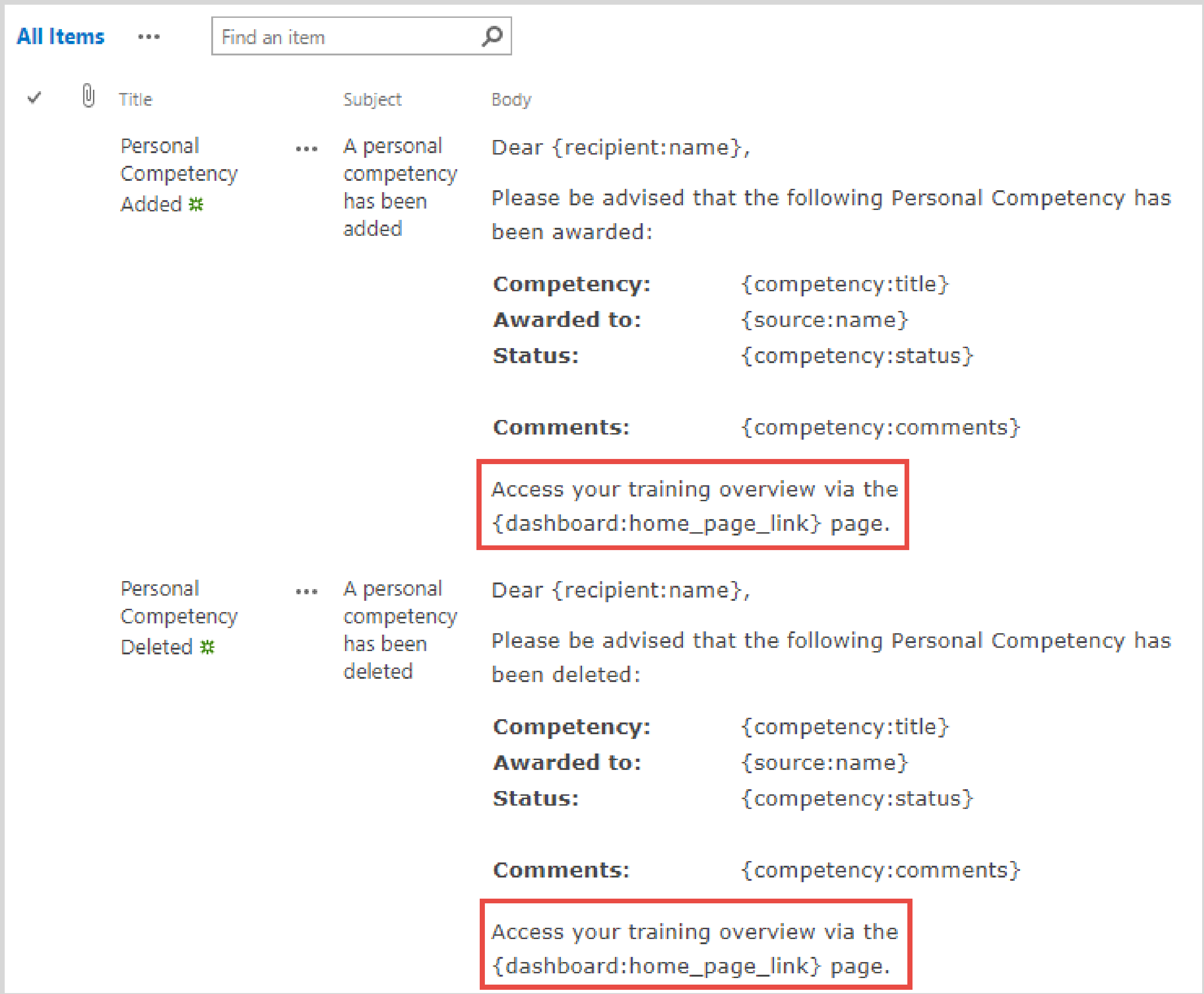
You will be redirected to the Message Templates list. The items are sorted by Title, Subject and Body:

Email Templates

All Items ••• Find an item

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

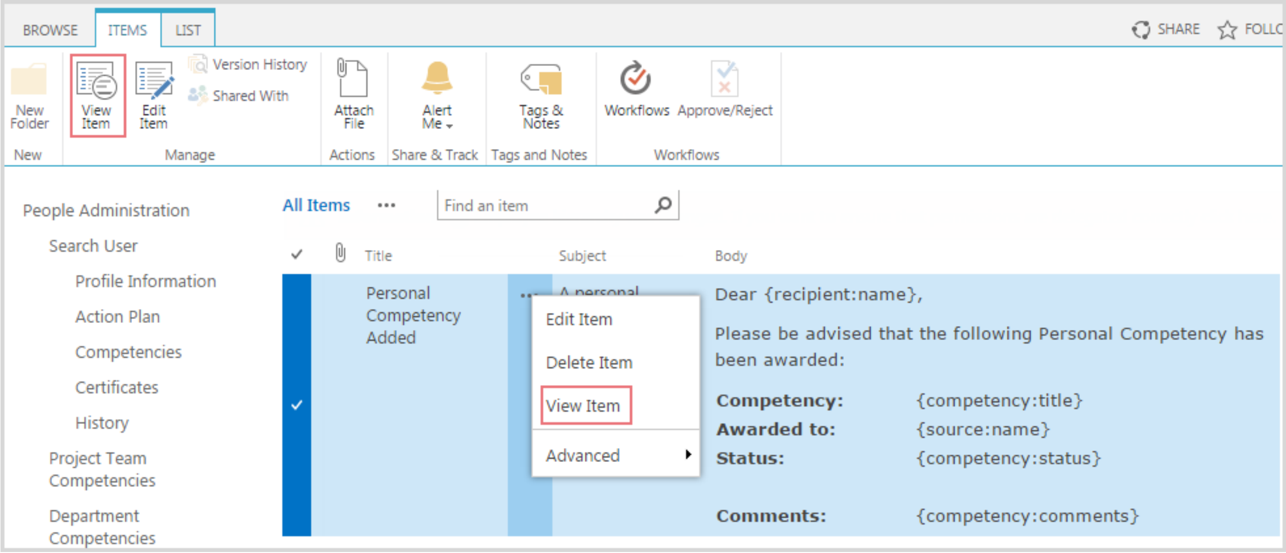
On the newly created CCM sites, a link to the REM Dashboard is added to the email templates:



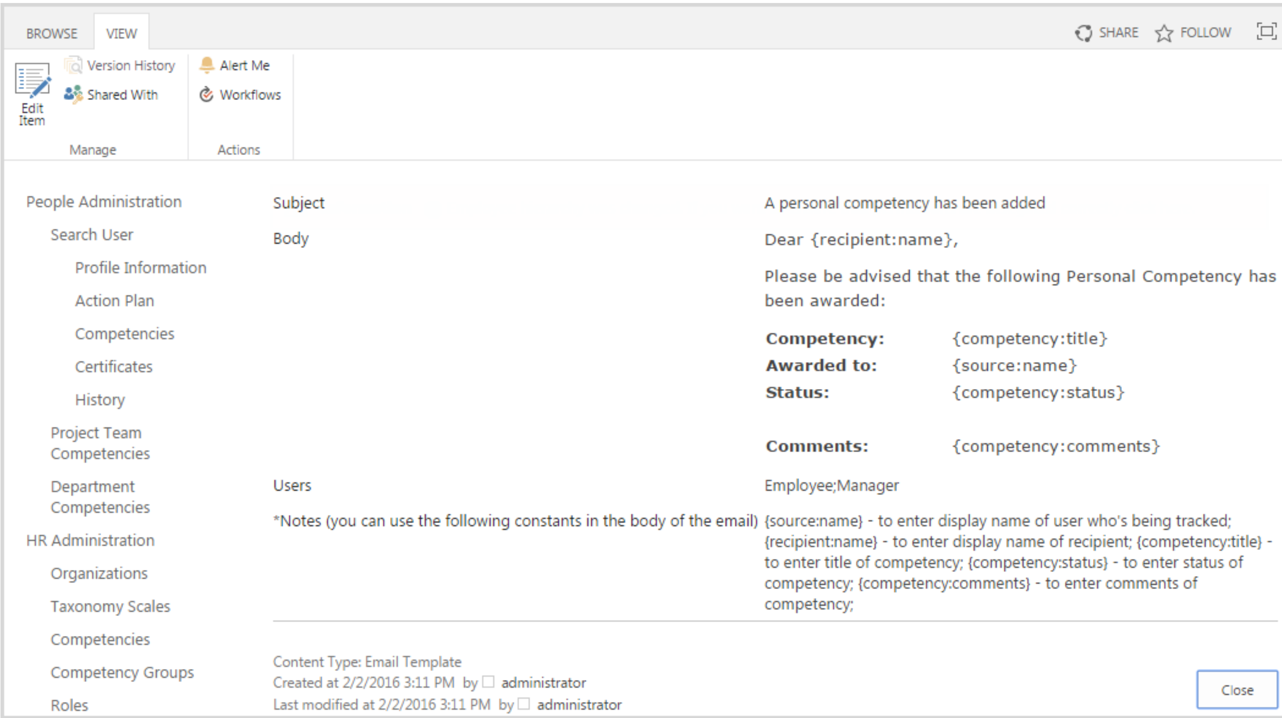
4.10.2 View Message Template's metadata

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:



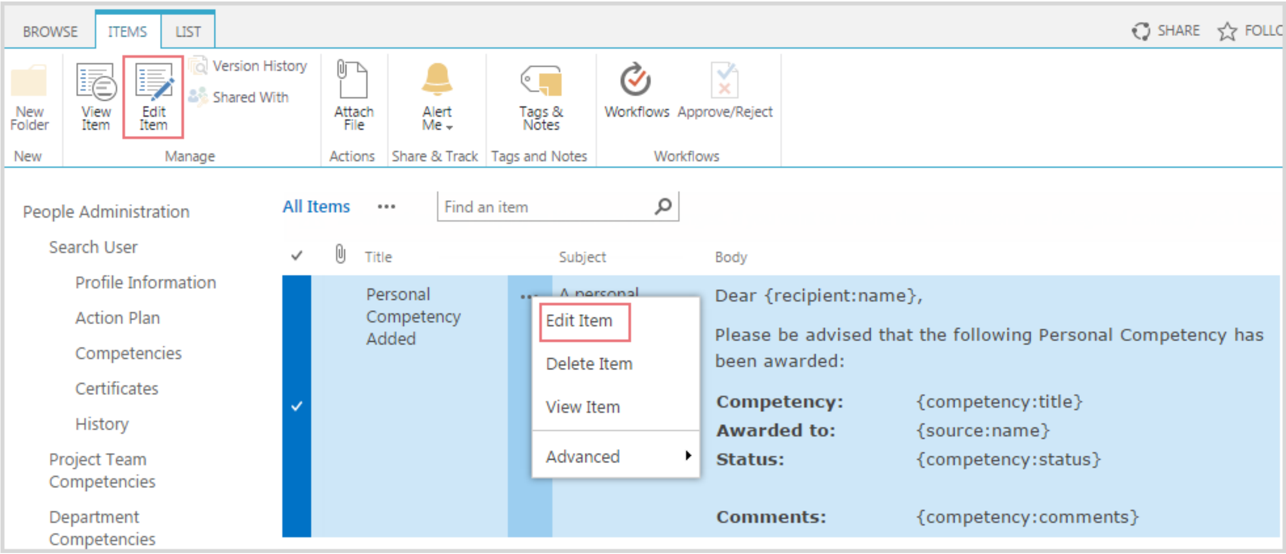
4) Click Close button to close the window and return to the Message Templates list.

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).

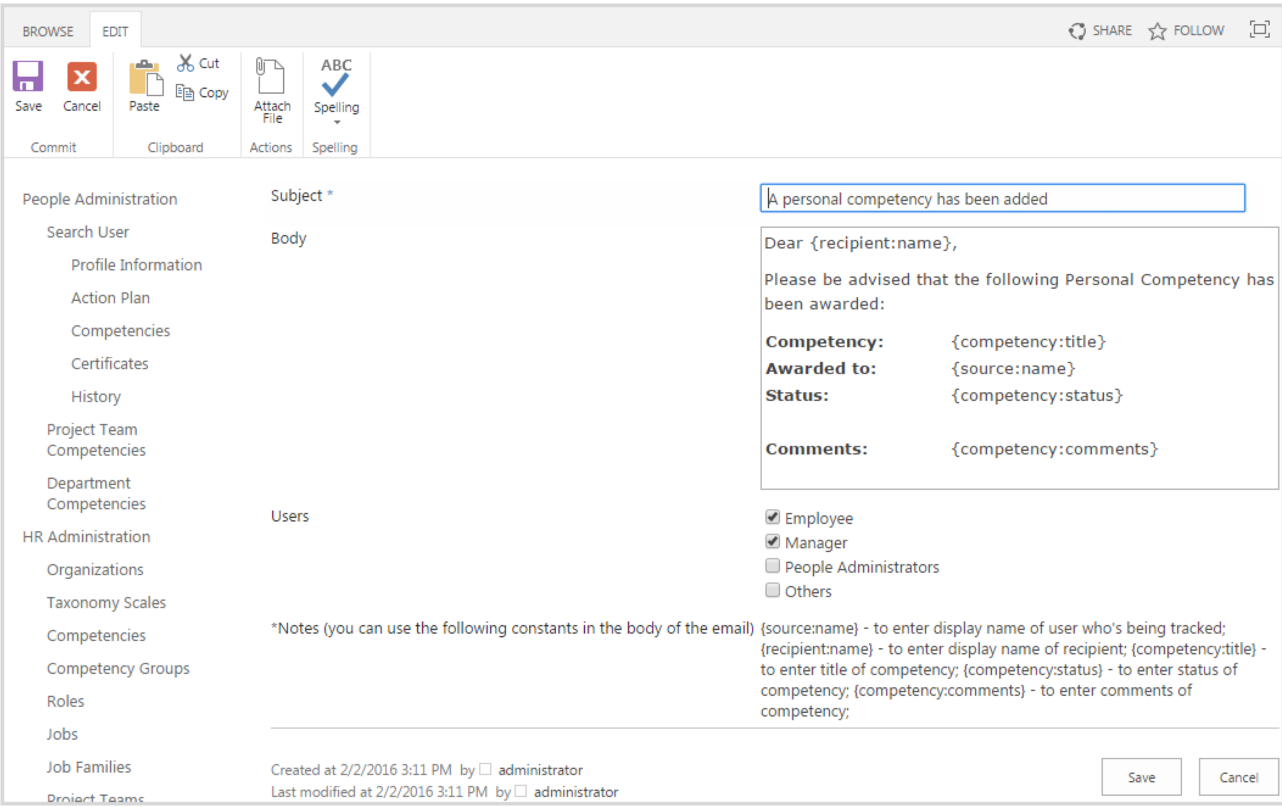
4.10.3 Edit Message Template

To change the Message Template, follow these steps:

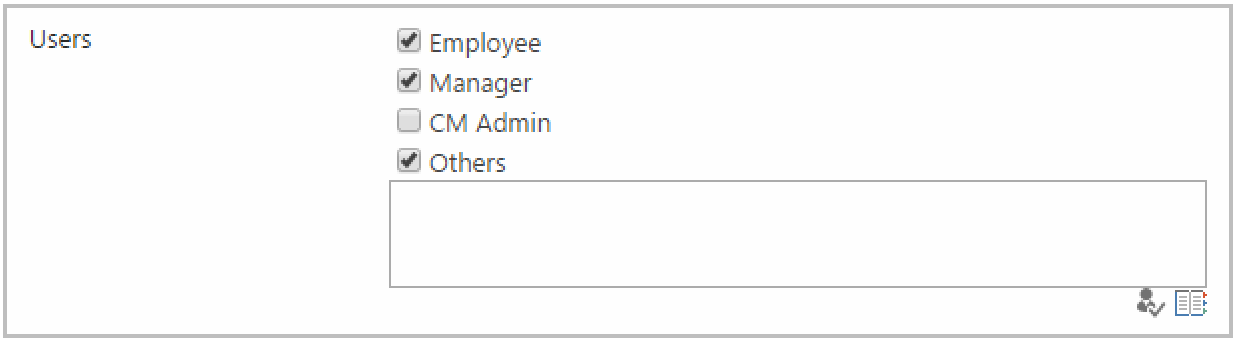
1) Select the Message Template in the Message Templates list;
2) From the ribbon menu Items or drop-down actions choose Edit Item:



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:

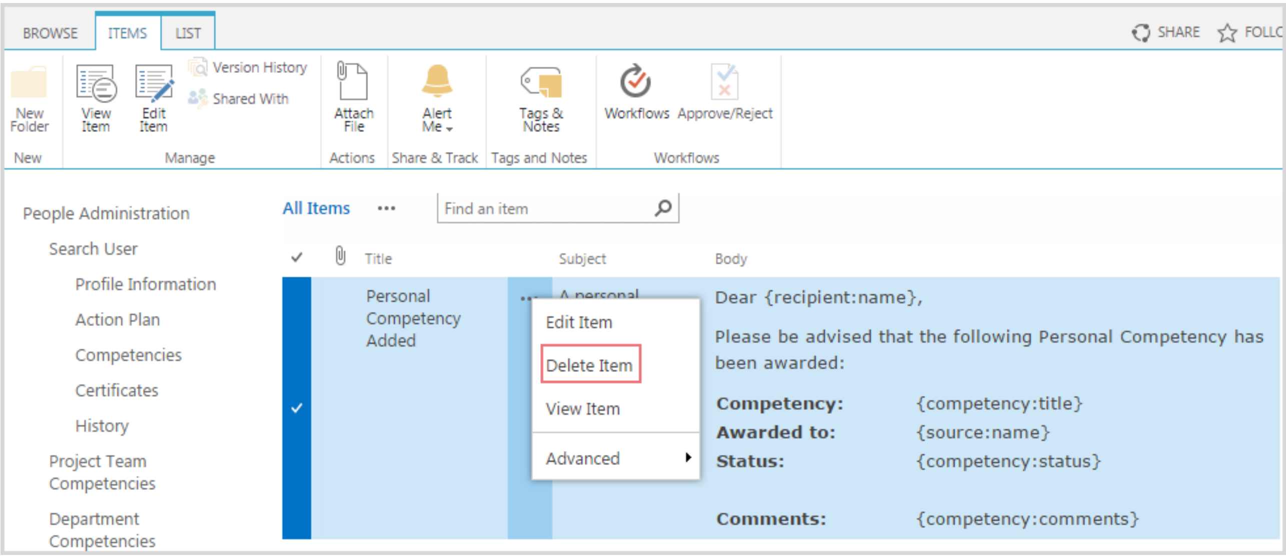


4) Click Save button to save the changes OR Cancel button to discard the changes. You will be redirected to the Message Templates list.

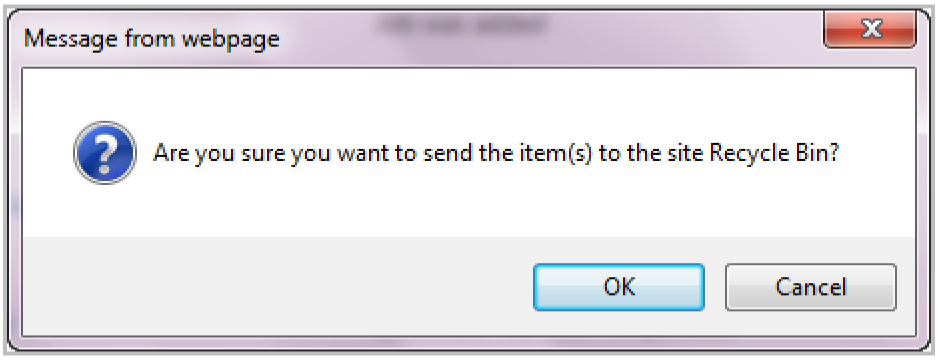
4.10.4 Delete Message Template

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:



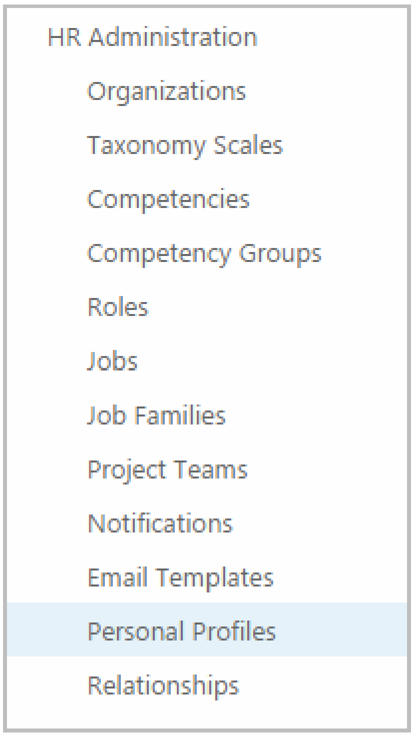
3) The system will ask you to confirm the decision to remove this Message Template:



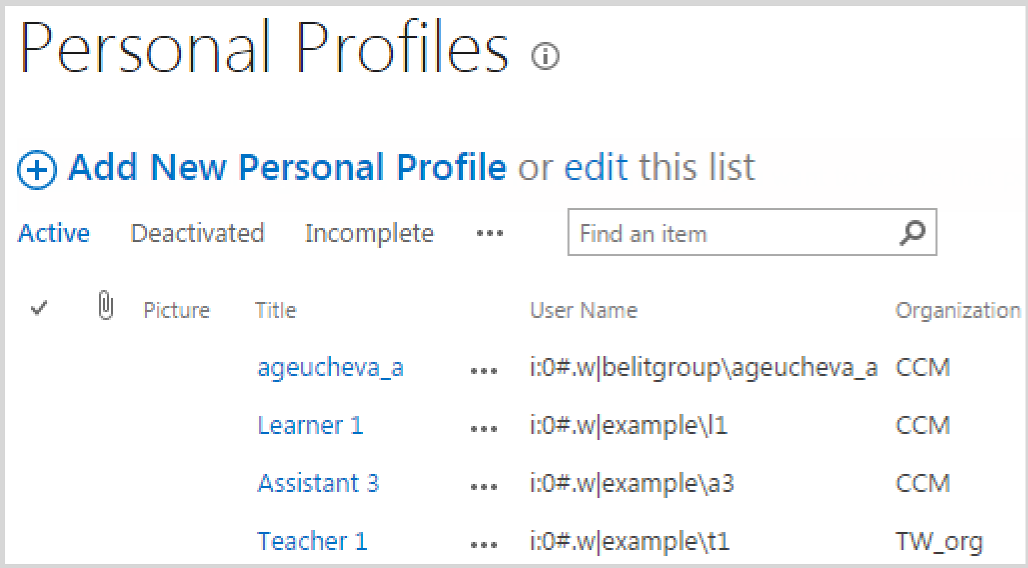
4) Click OK button to confirm the decision <u>OR</u> click Cancel button to discard the changes. You will be redirected to the Message Template list, where the removed Message Template will no longer be presented.

4.11 Personal Profiles

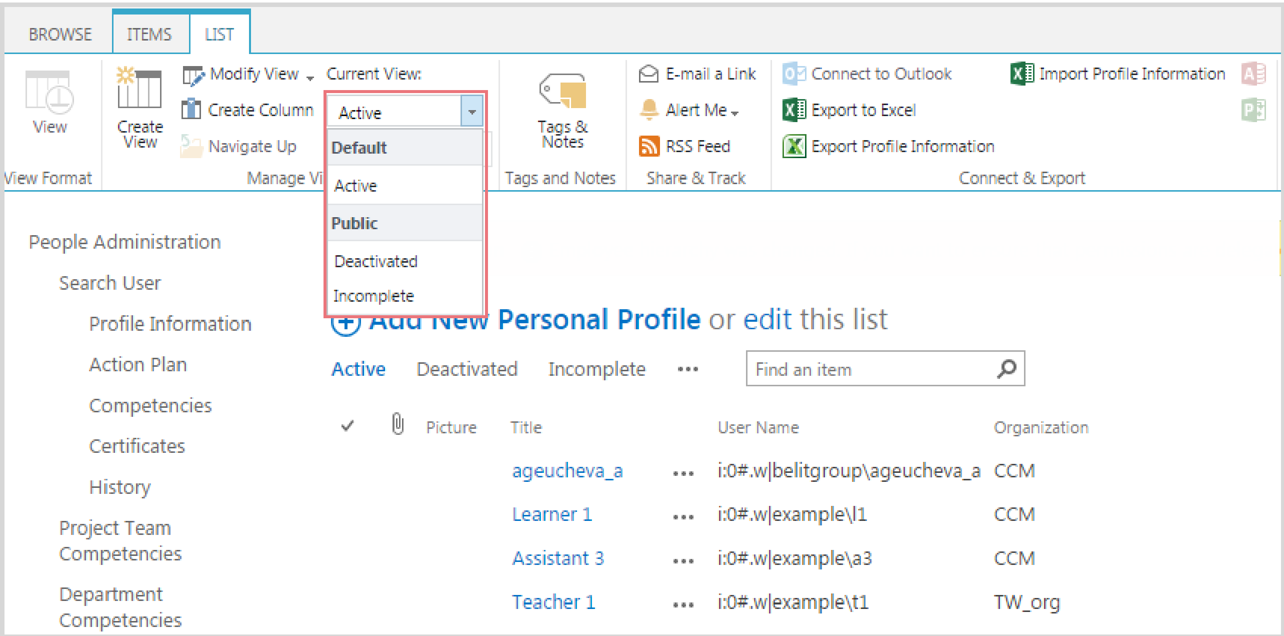
To access the Personal Profiles page, click the Personal Profiles link on the left side menu on the Home page:



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:



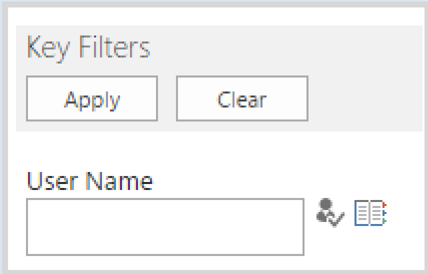
The following views are available for this list:



- 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:

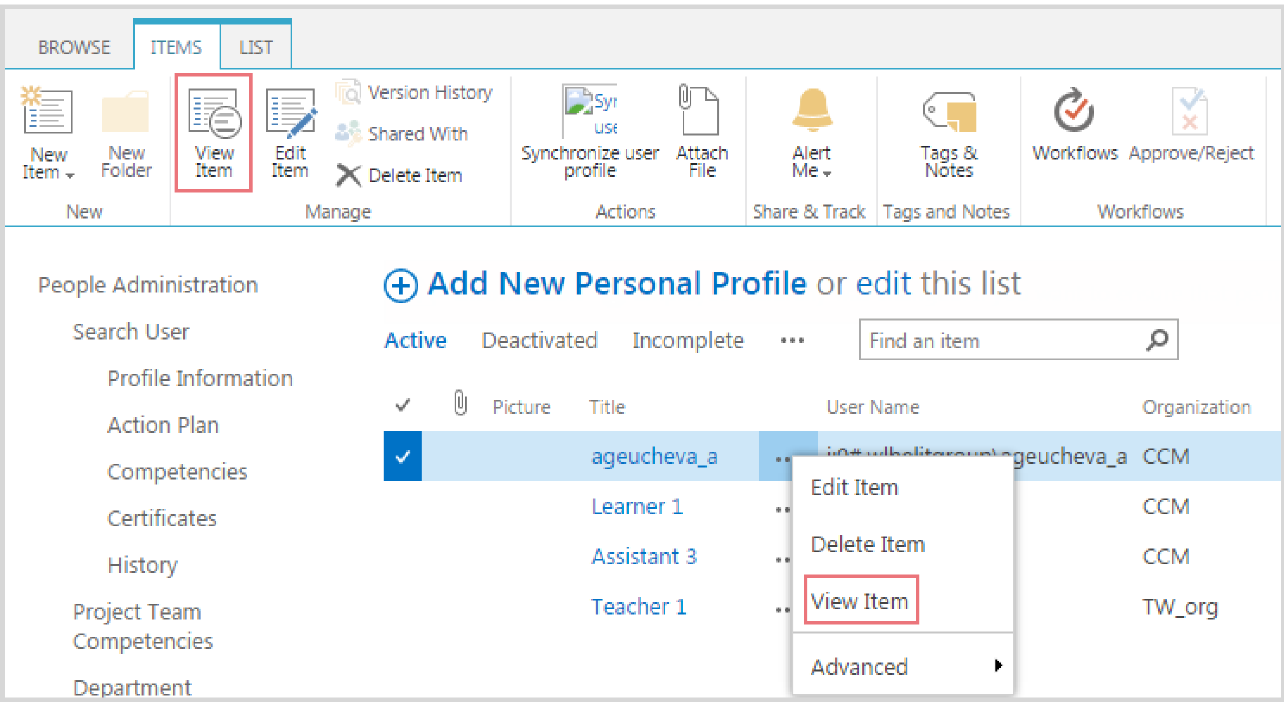


More filters can be added in the List Settings > Metadata navigation settings > Configure Key Filters. Do not forget to check whether new Key Filters have been added to the Indexed Columns. If not, you should index new Key Filters manually. To do this, go to List Settings > Indexed columns > Create a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



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

Close

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:

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

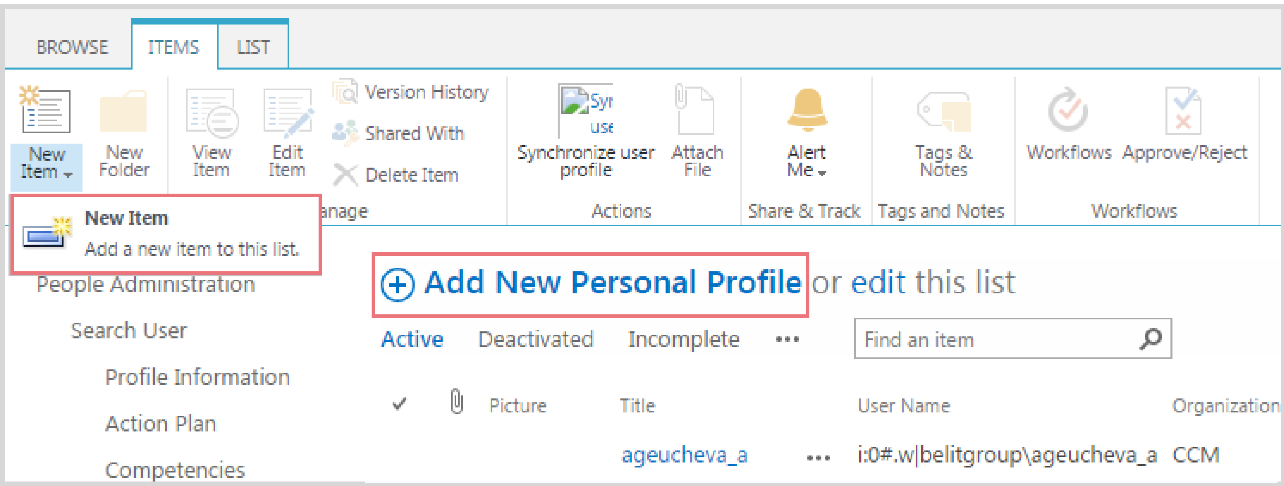
4.11.3 Create Employee's Profile

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

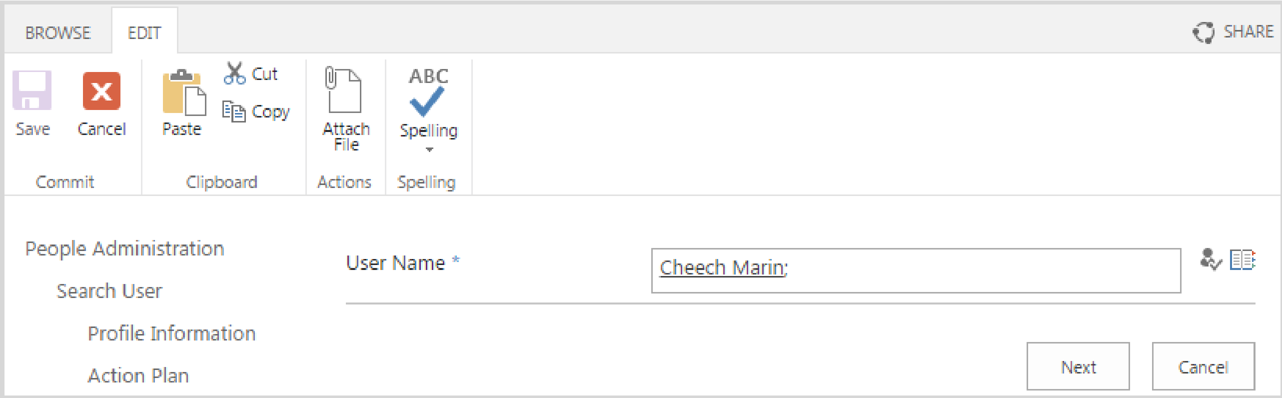
1) Click Add New Personal Profile button ⊕ ;

OR

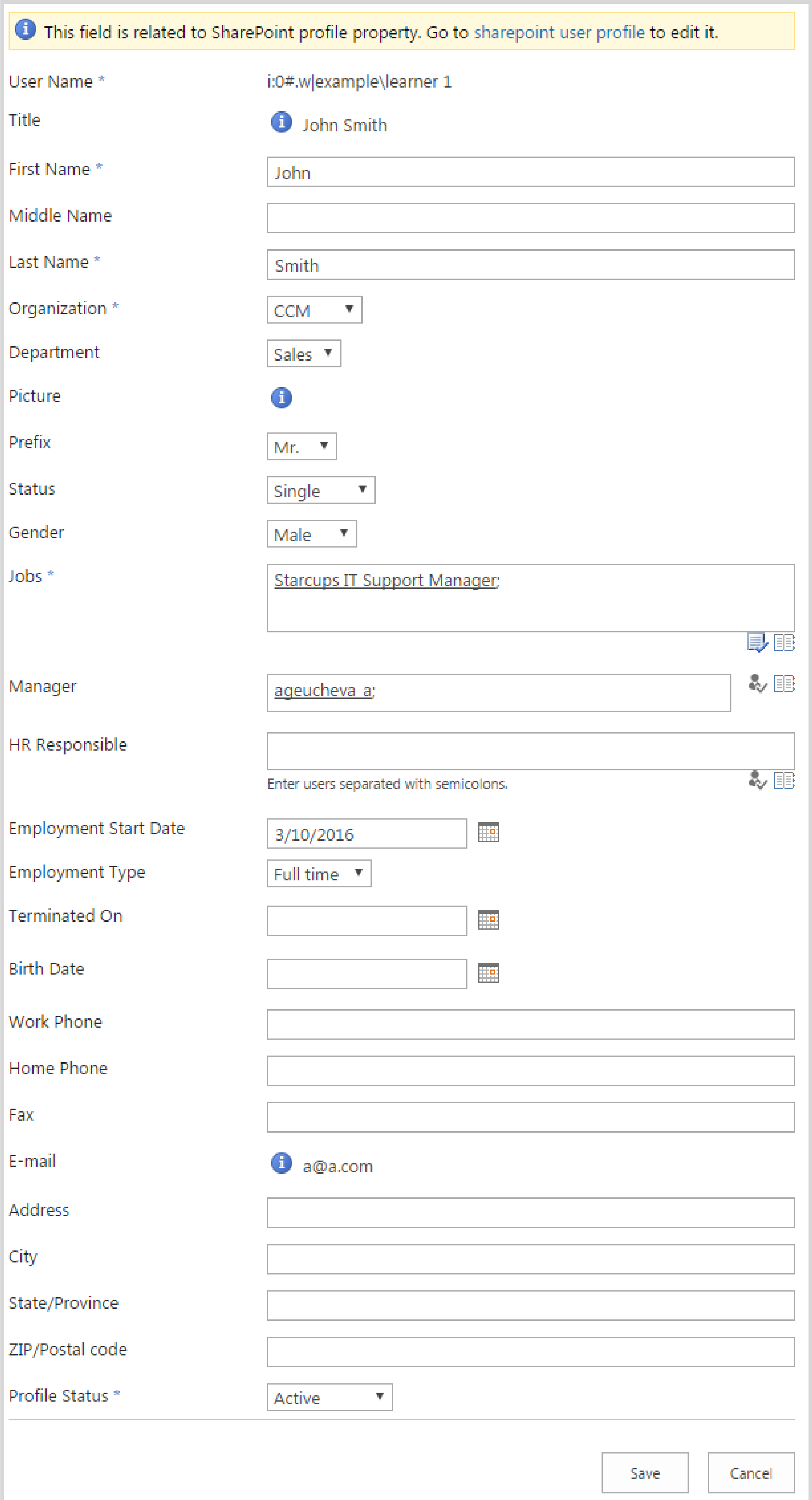
2) On the ribbon go to Items > New Item and choose New Item from the drop-down:



The 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:



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:


This field is related to SharePoint profile property. Go to sharepoint user profile to edit it.

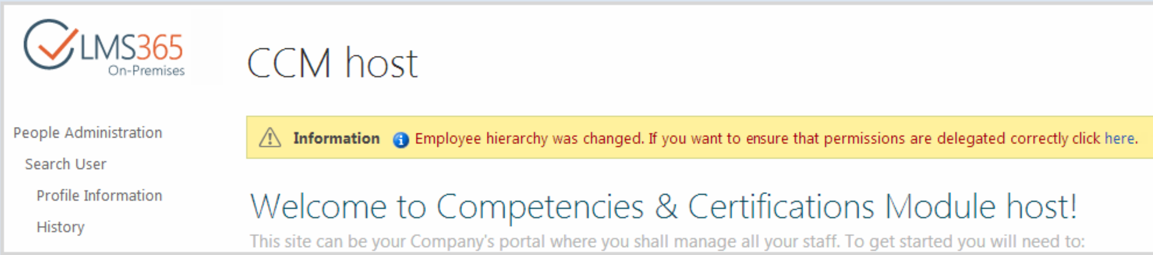
User Name *	i:0#.w|example\learner 1
Title	John Smith
First Name *	John
Middle Name	
Last Name *	Smith
Organization *	CCM
Department	Sales
Picture	
Prefix	Mr.
Status	Single
Gender	Male
Jobs *	Starcups IT Support Manager;
Manager	ageucheva a;
HR Responsible	Enter users separated with semicolons.
Employment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

Save Cancel

- 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

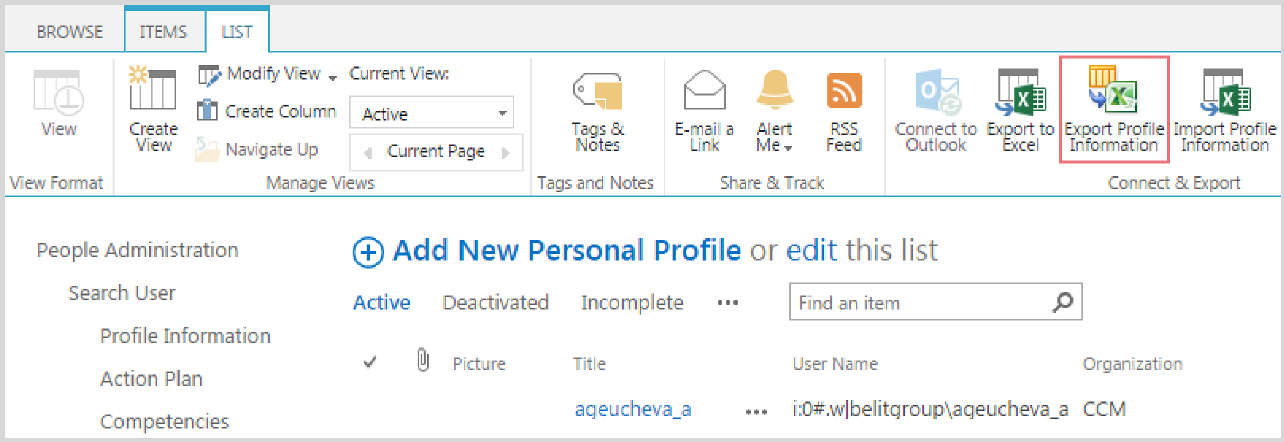
The User can also create a new Profile for an employee from the User Search page.

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.

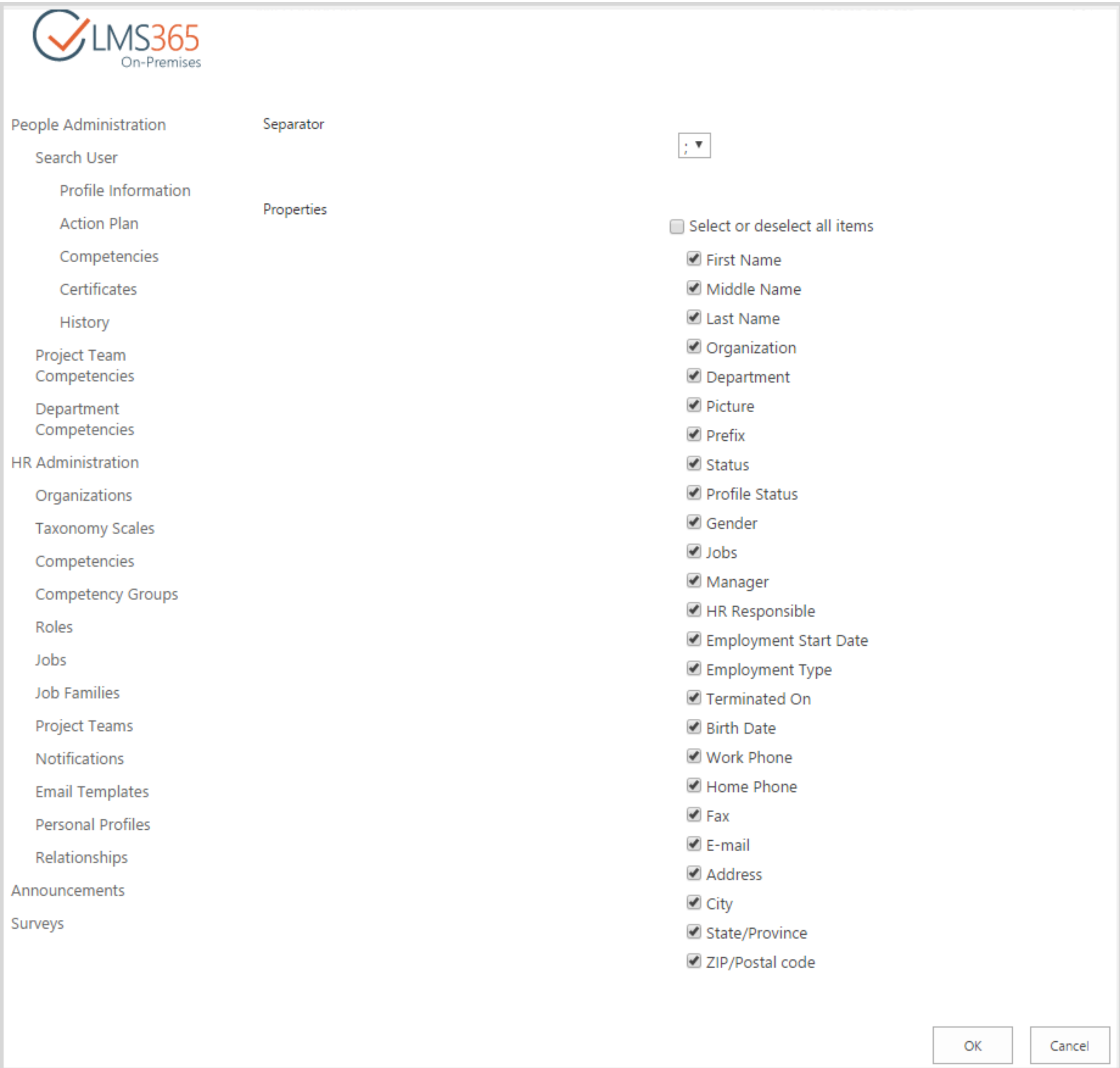
4.11.5 Export Profile Information

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:



3. Select options for the exported file:



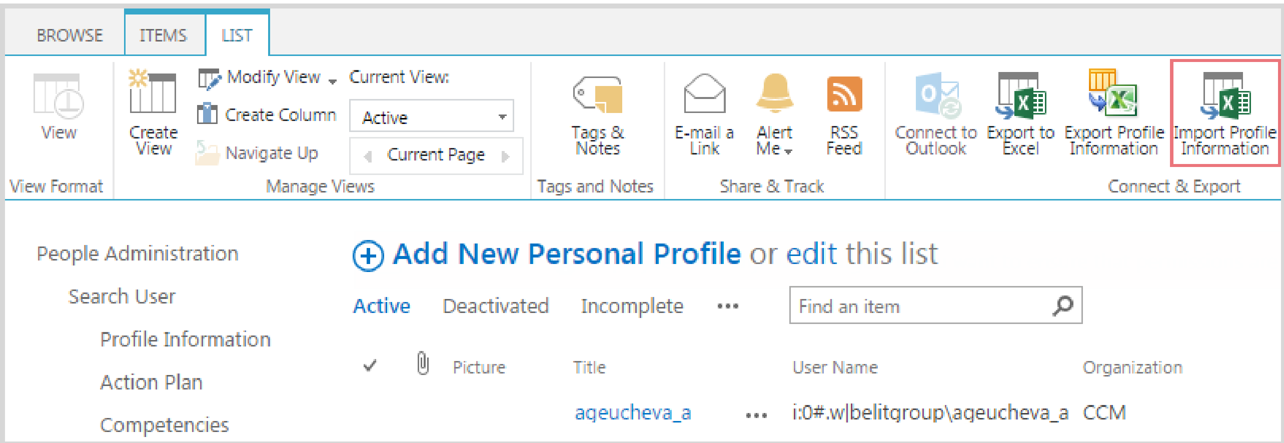
- Separator – select from the drop-down which character will be used as separator;
- Properties – select fields to be exported.

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

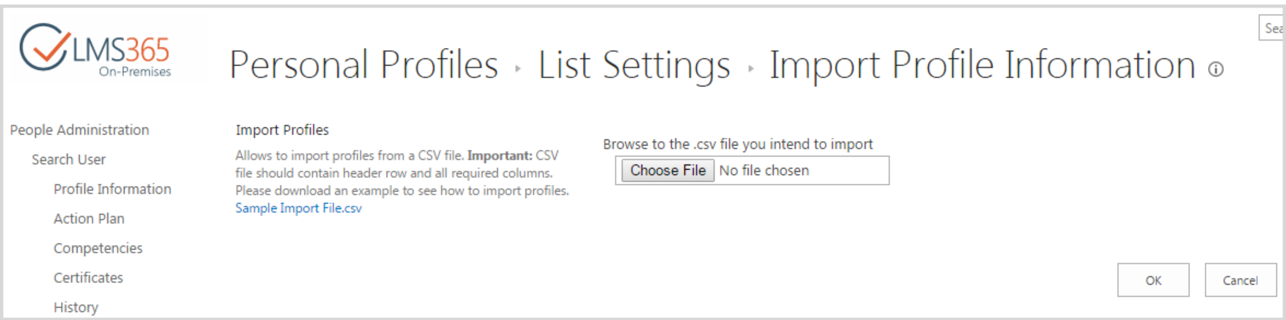
4.11.6 Import Data from .csv file

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.

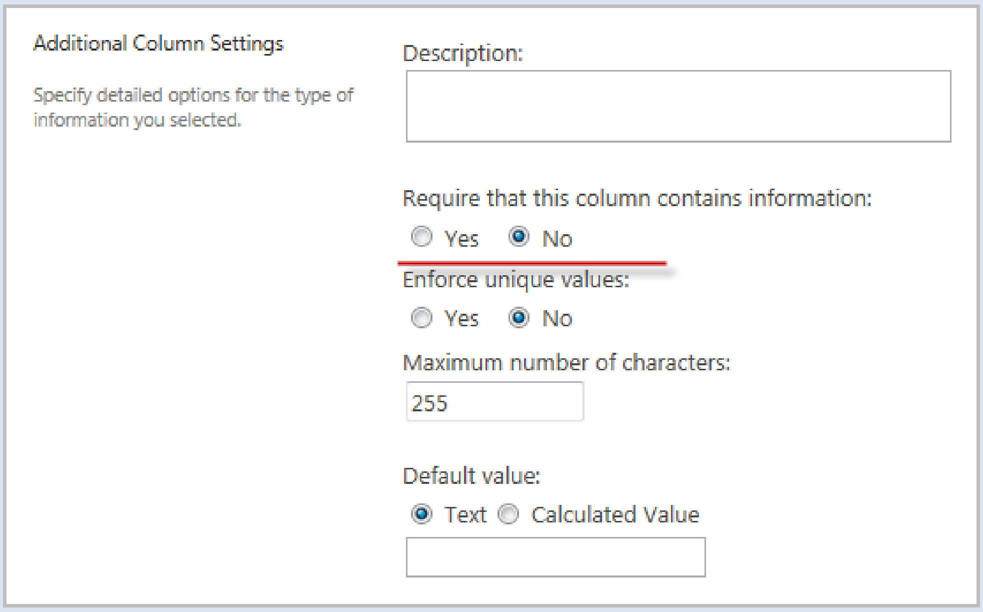
Required columns can be set in Profiles List > List Settings:

Columns

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

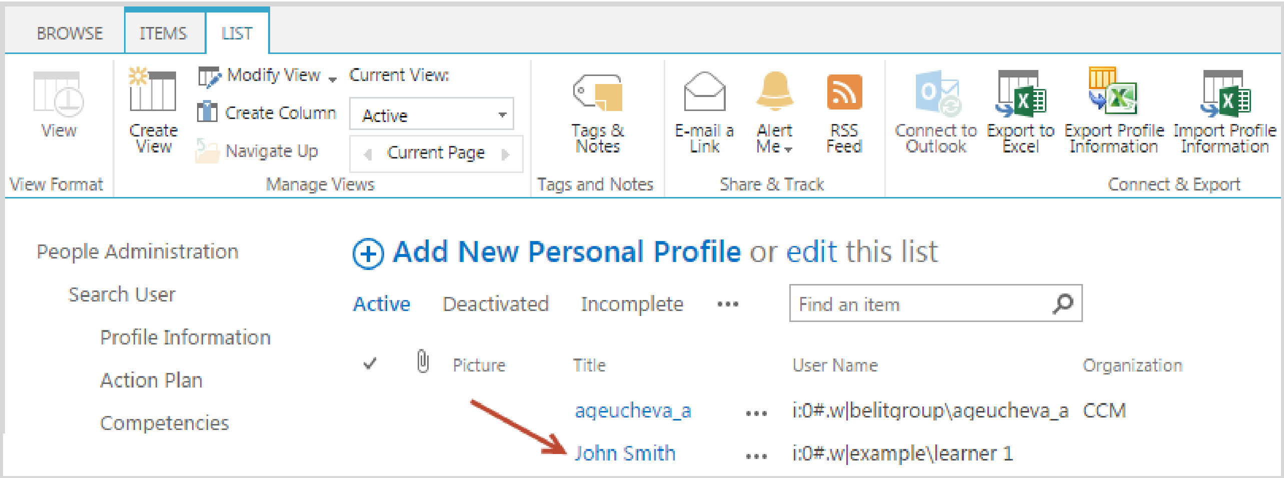
Column (click to edit)	Type	Required
First Name	Single line of text	✓
Middle Name	Single line of text	
Last Name	Single line of text	✓
	Organization	✓
Organization	Organization	✓
Department	Choice	
Prefix	Choice	
Status	Choice	
Profile Status	Choice	✓
Gender	Choice	
Jobs	Job	✓
Manager	Employee	
HR Responsible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

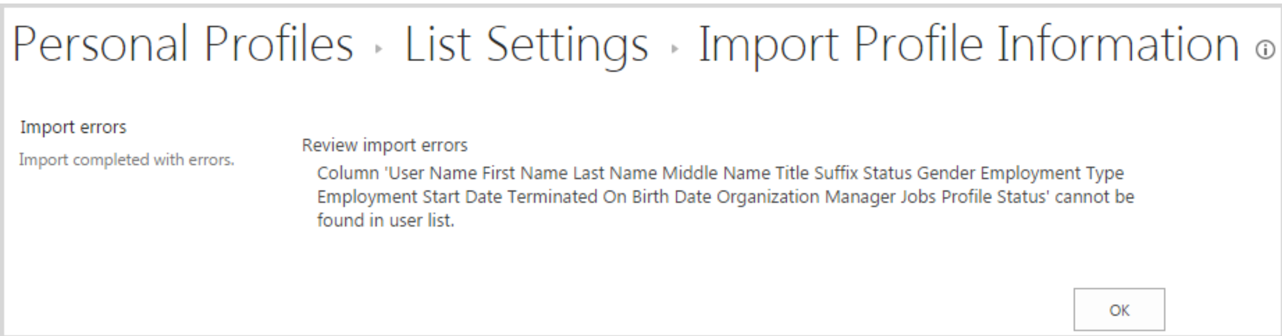


NOTE:	Make sure that user you want to upload is added to Employees or Managers group in CCM.

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:

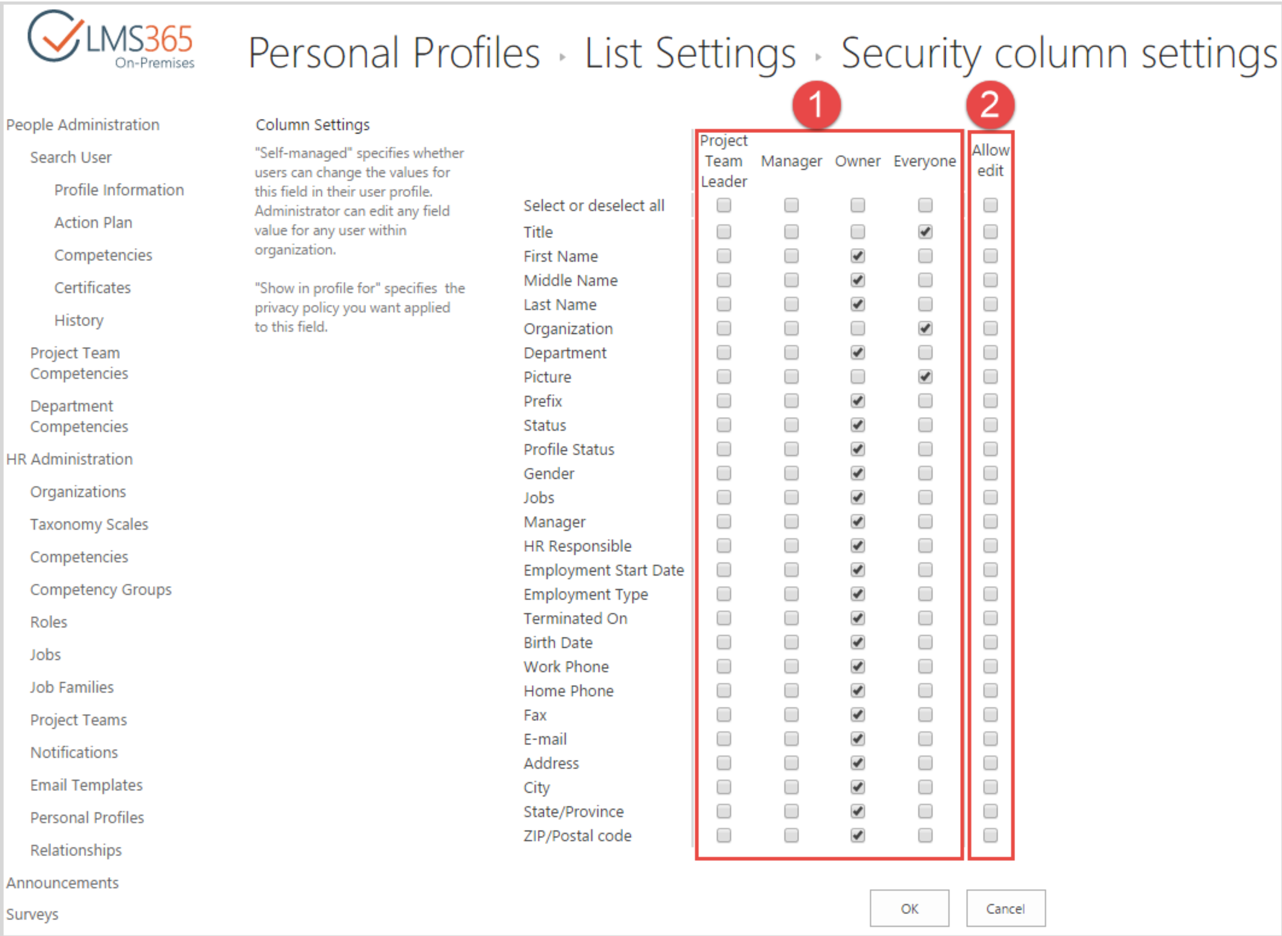


If SharePoint User profile service is not activated then fields Title, Email and Pictures will be uploaded from the import file.

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:



- Zone 1 allows setting permission to view profile field by role;
- Zone 2 allows setting permission to edit profile filed. 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.

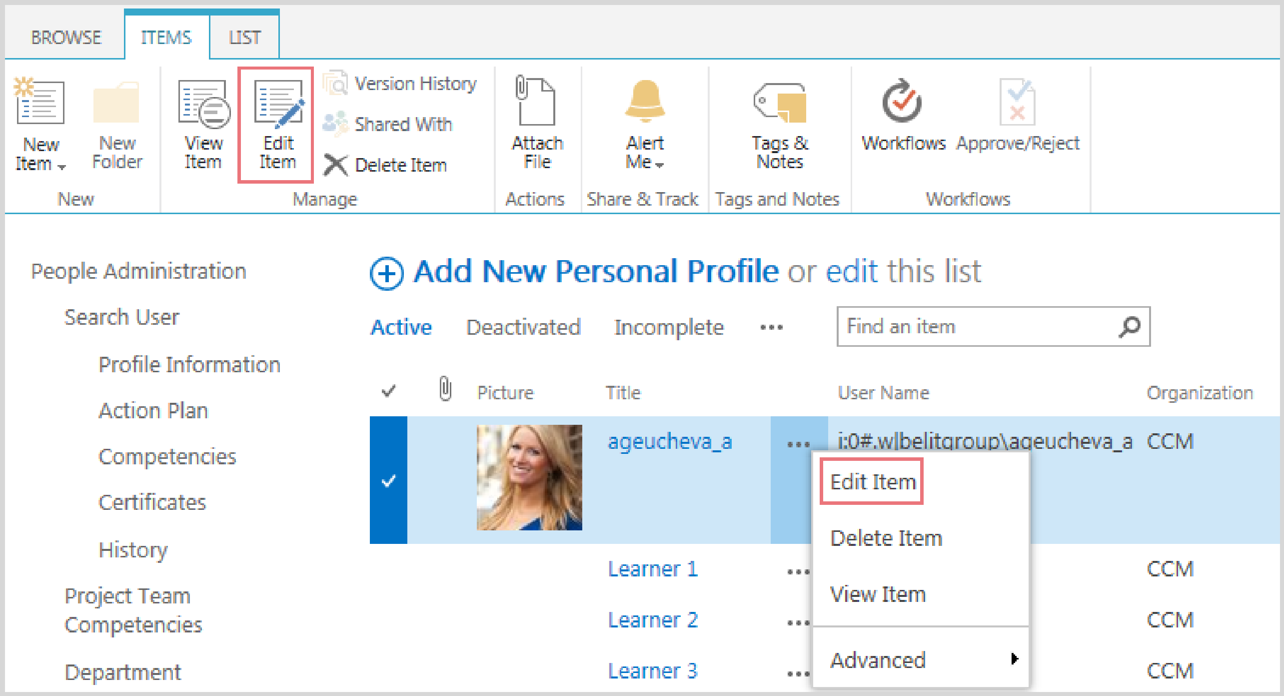
4.11.8 Edit Employee's Profile

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

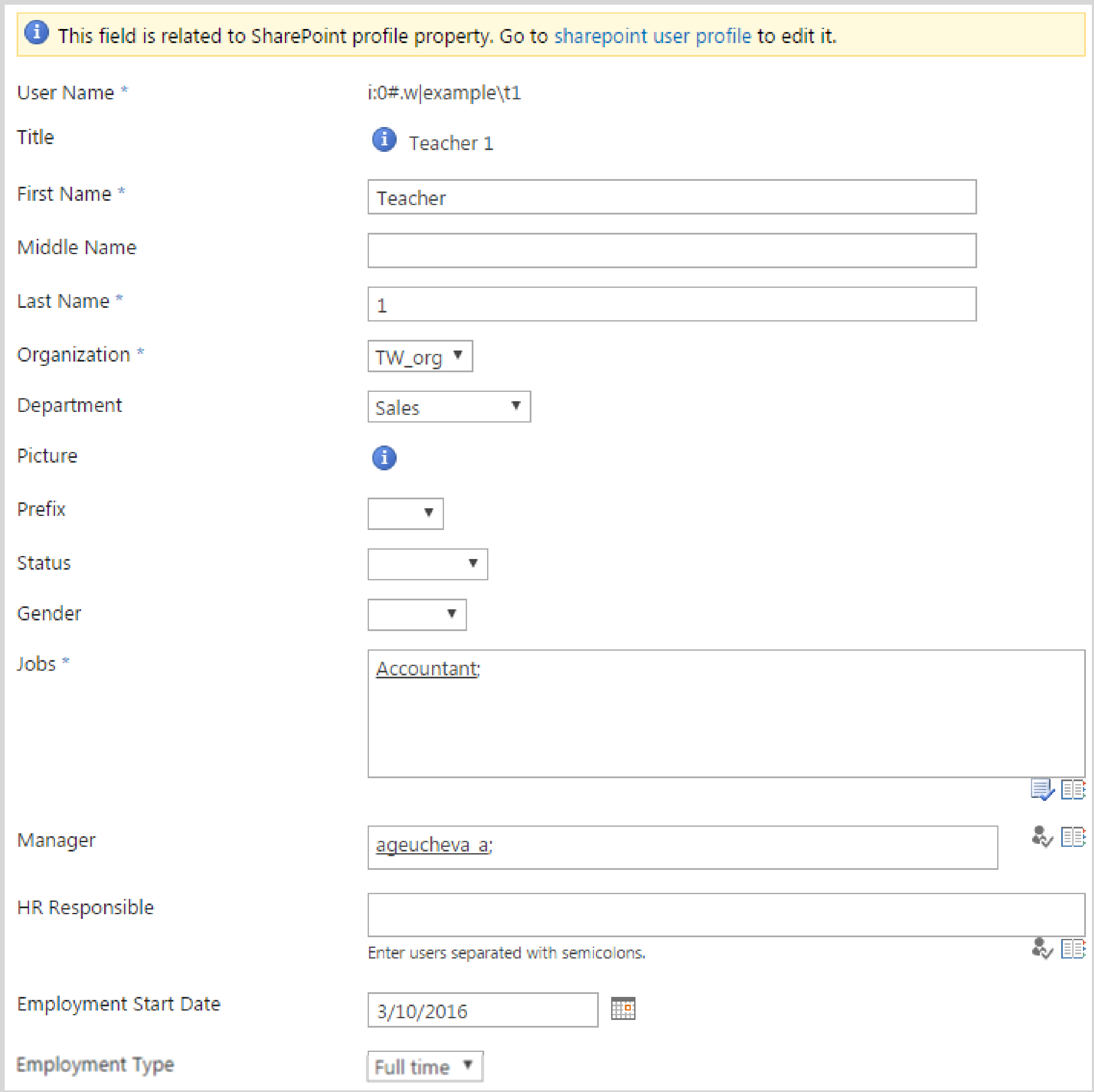
1) Select the employee's Profile from the Personal Profiles list;
2) Click Edit Item from the Items on the ribbon;

OR

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

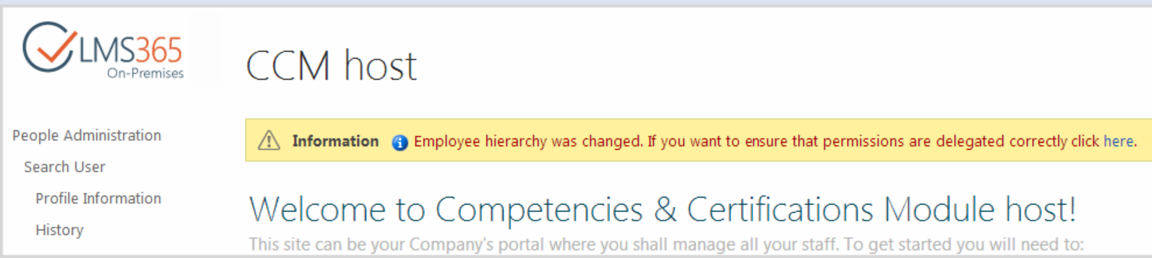


The Personal Profile – Edit form opens:



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:



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.

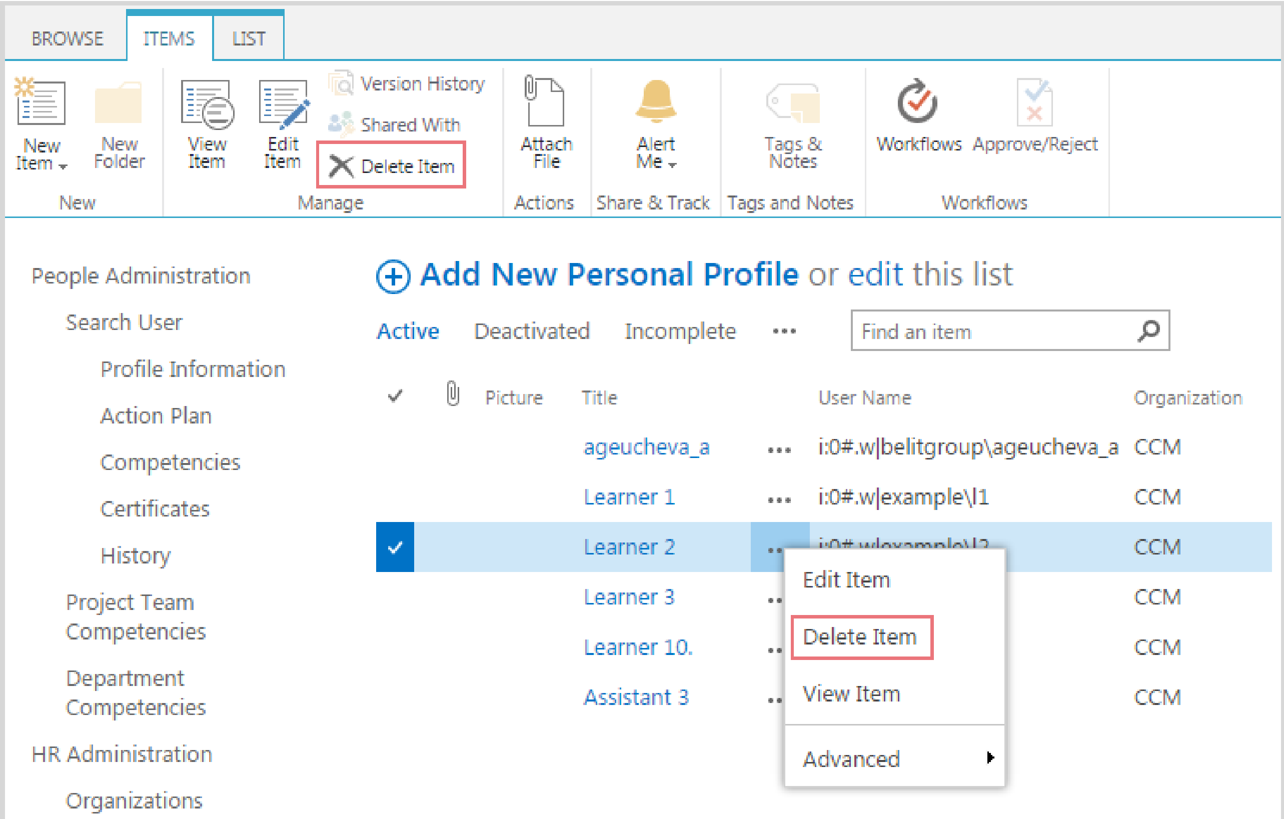
4.11.9 Delete Employee's Profile

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

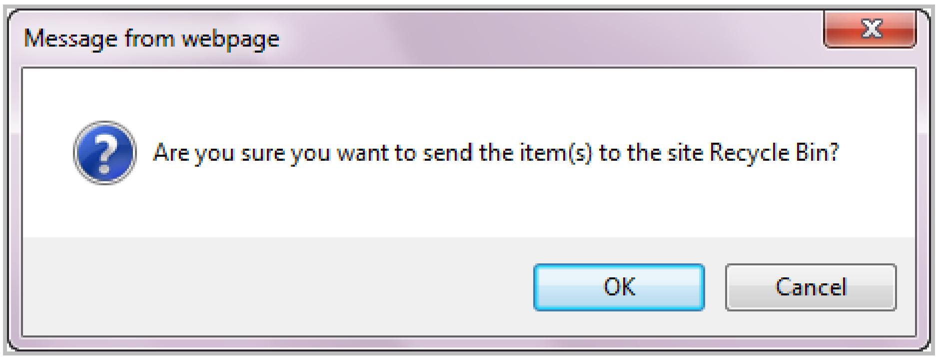
1) Select the employee's Profile from the Personal Profiles list;
2) Click Delete Item from the Items on the ribbon;

OR

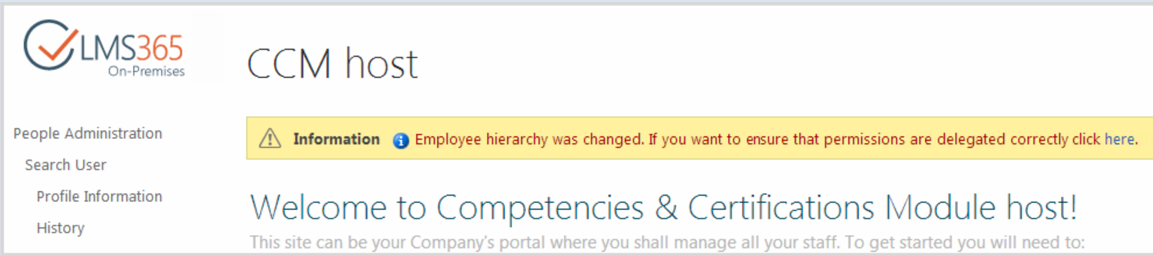
3) Click on the callout menu next to the employee's name;
4) Choose Delete Item from the actions list:



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



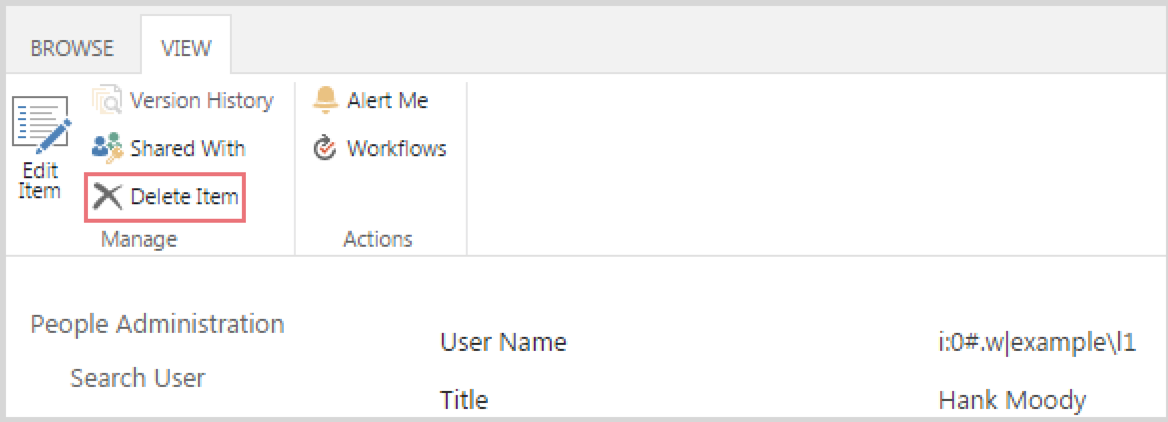
5) Confirm the decision to delete the Personal Profile of an employee by clicking OK button or discard the process by clicking Cancel button.

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 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.

4.11.9.1 Delete Employee's Profile from User Search page

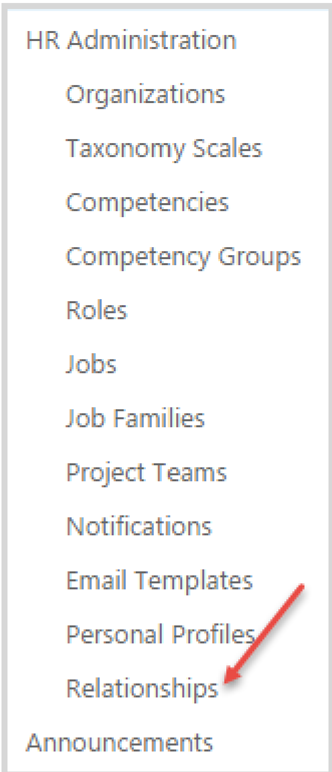
To remove the Personal Profile of the employee, follow these steps:

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:

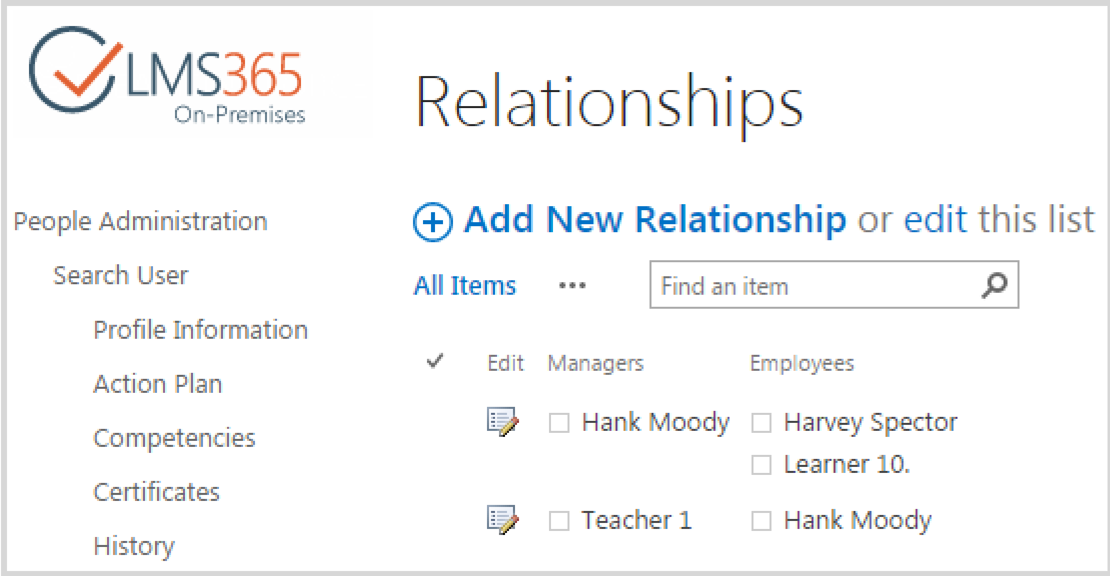


4.12 Relationships

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:

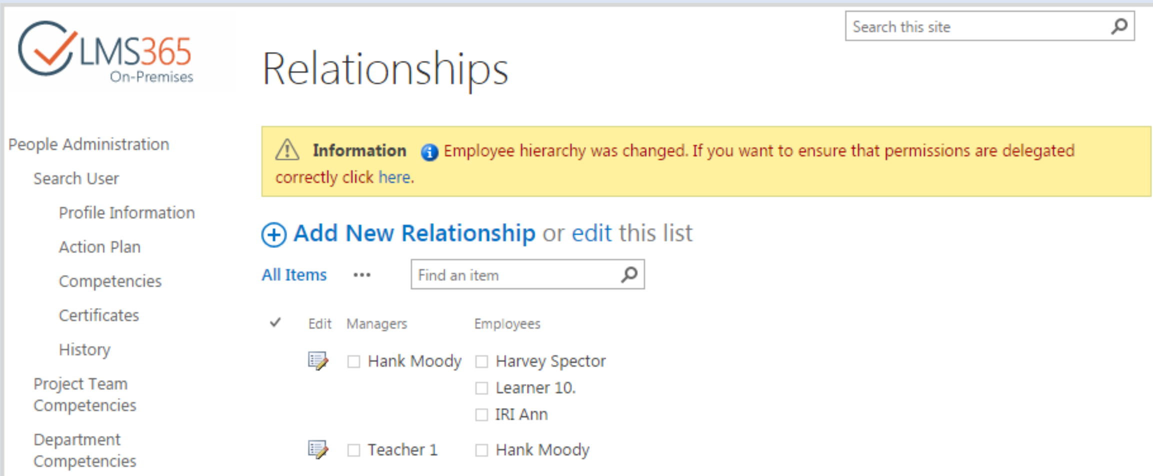


The User is redirected to the Relationships page where the list of Relationships is displayed:



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:

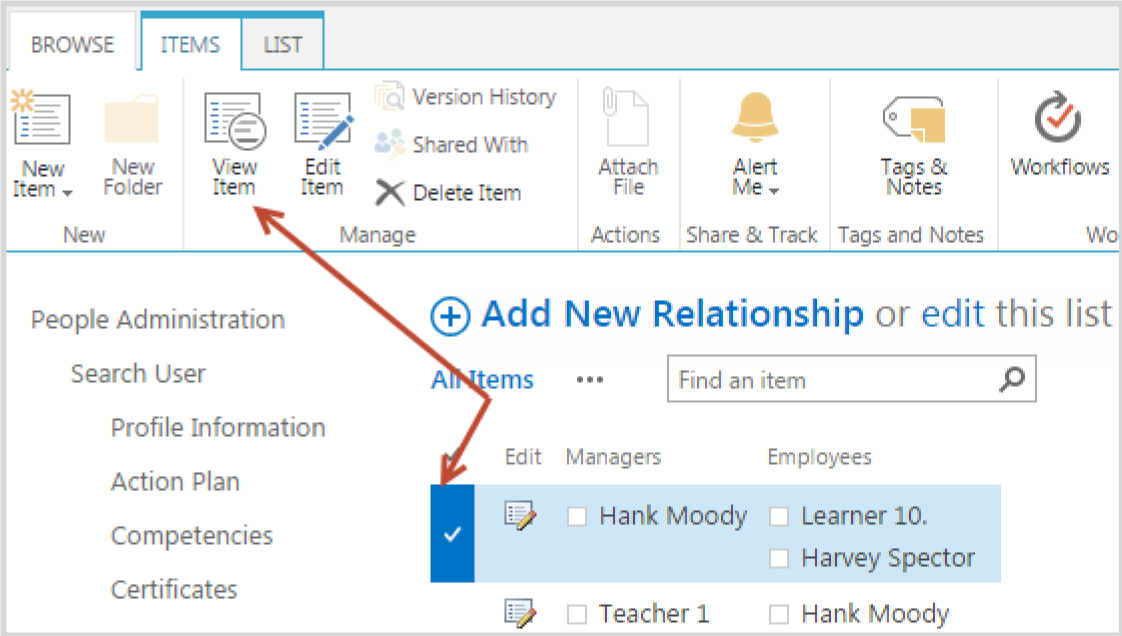


Permissions are updated by the ELEARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

4.12.1 Viewing Relationships

To view a relationship, do the following:

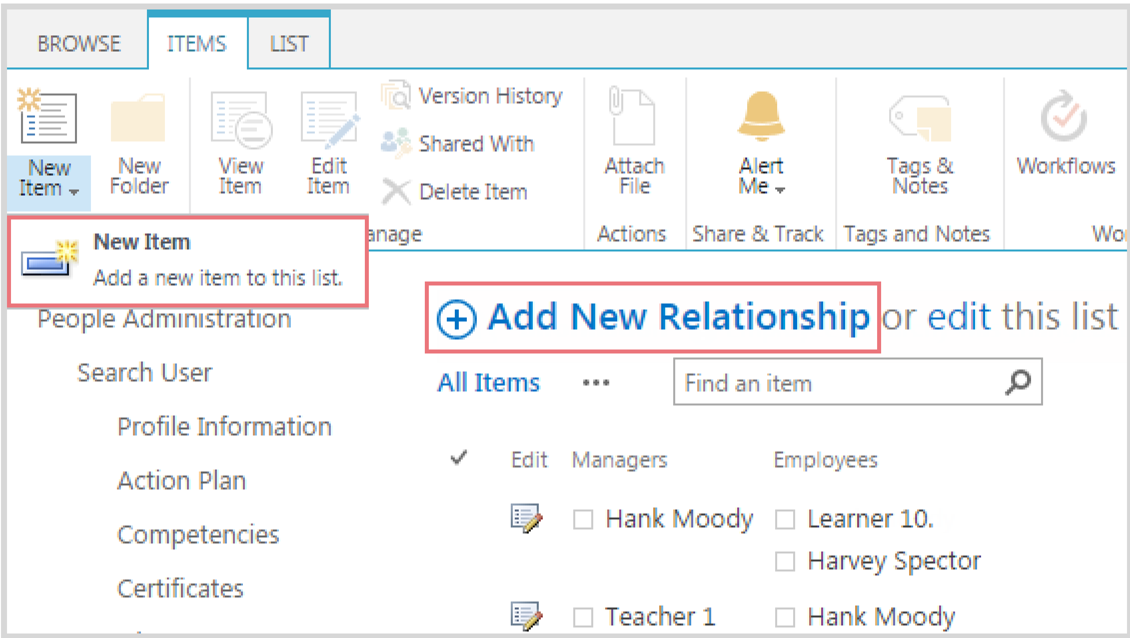
1. Select the check box next to the relation you want to view;
2. Click the View Item icon in the Items tab:



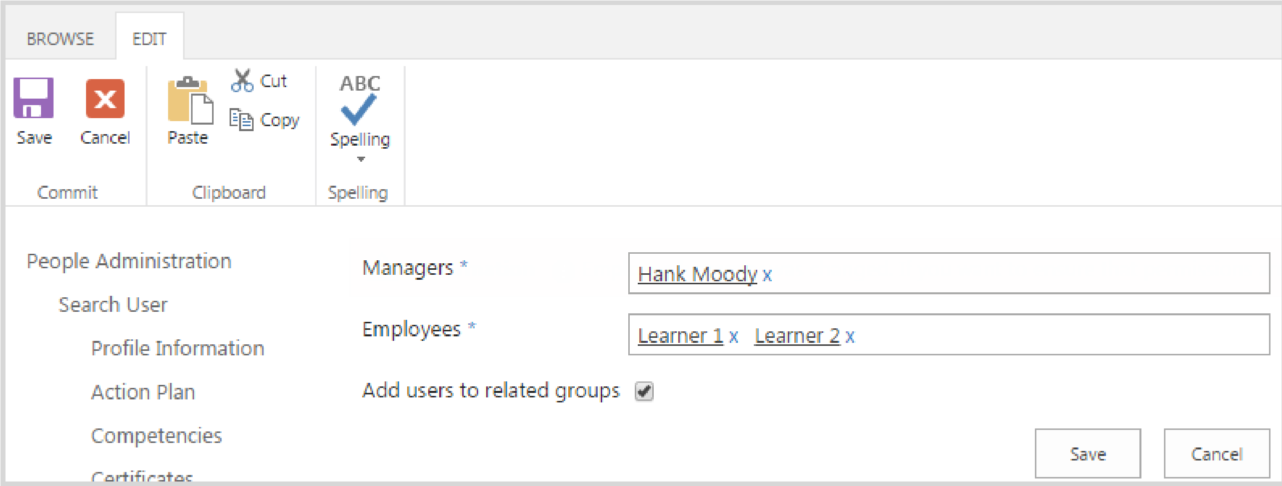
4.12.2 Creating Relationships

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:

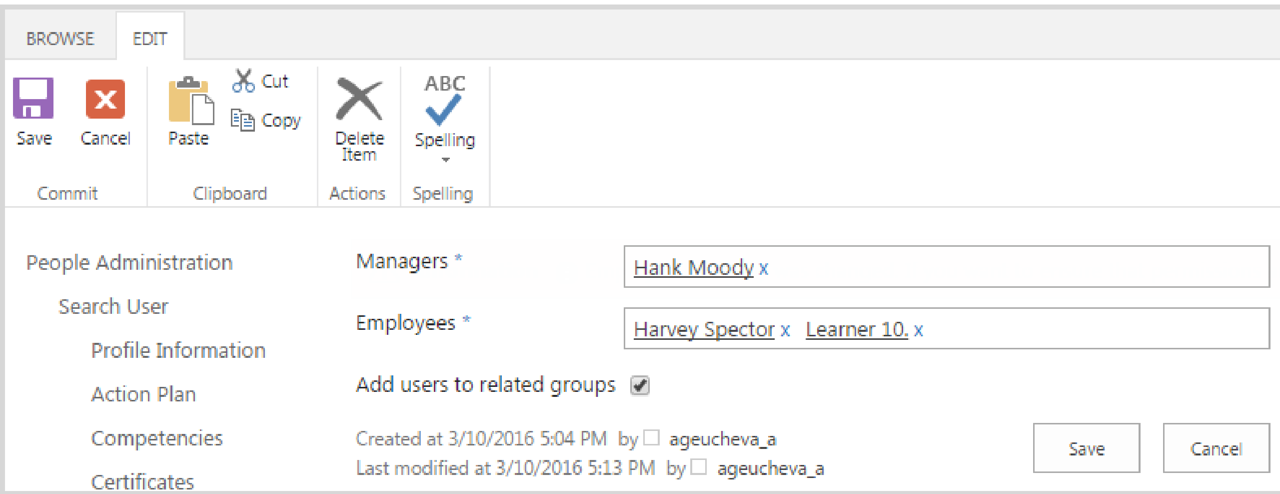


- *Managers* – specify managers for the relationship. Users will become Additional Line Managers for selected employees and will be granted corresponding permissions described in [Permissions](#) section.
- *Employees* – specify employees for the relationship.
- *Add users to related groups* – enable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

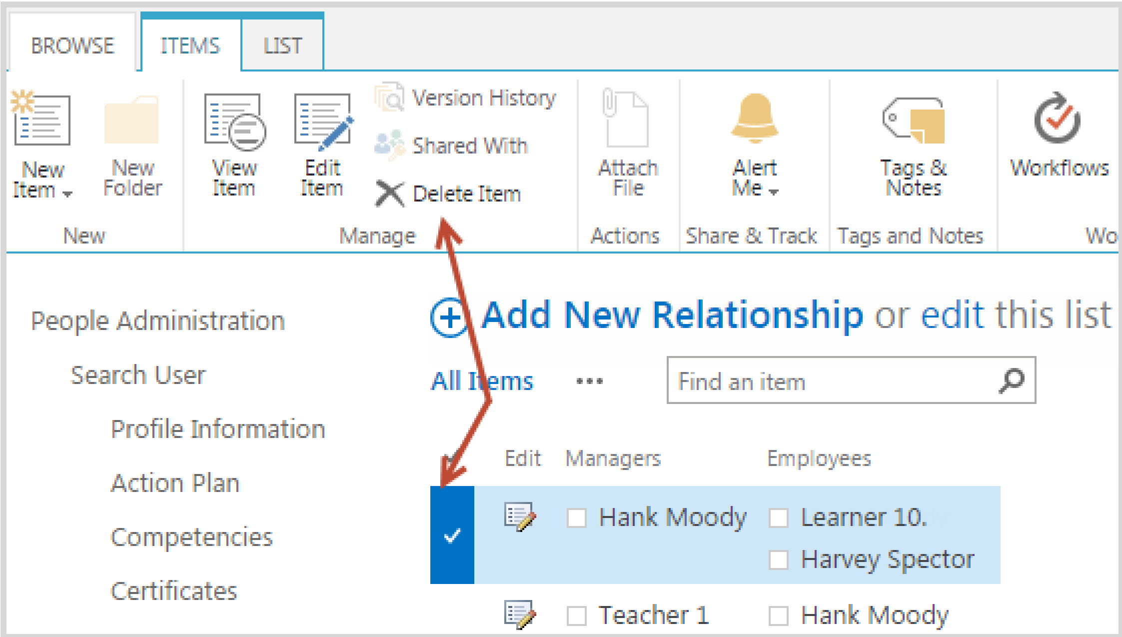
To edit a Relationship click Edit item ( ) icon against the Relationship you want to edit, or select the check box next to the relation you want to edit and click the View Item icon in the Items tab. Modify the Relation in the open form:



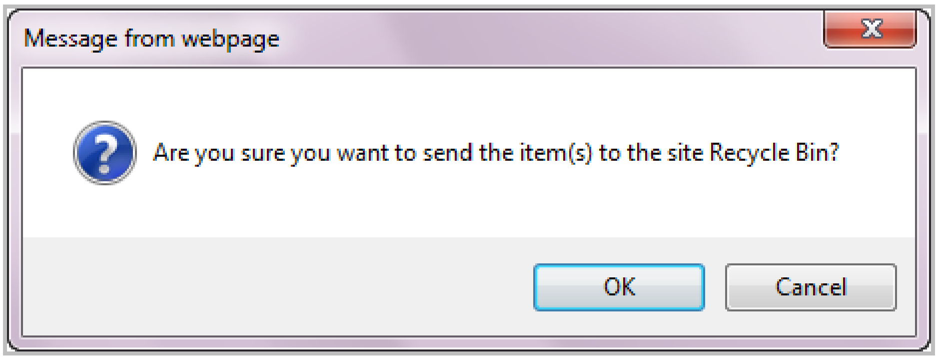
Click Save to save changes. Click Cancel to discard the changes.

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:



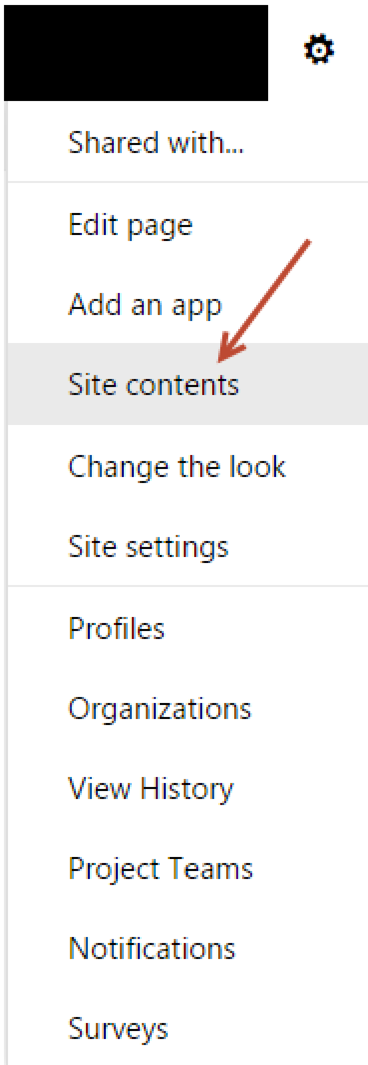
Click OK button to confirm the decision <u>OR</u> click Cancel button to discard the changes.
You will be redirected to the Relationships list, where the removed item will no longer be presented.

5 SHAREPOINT CCM ATTACHMENTS MANAGEMENT

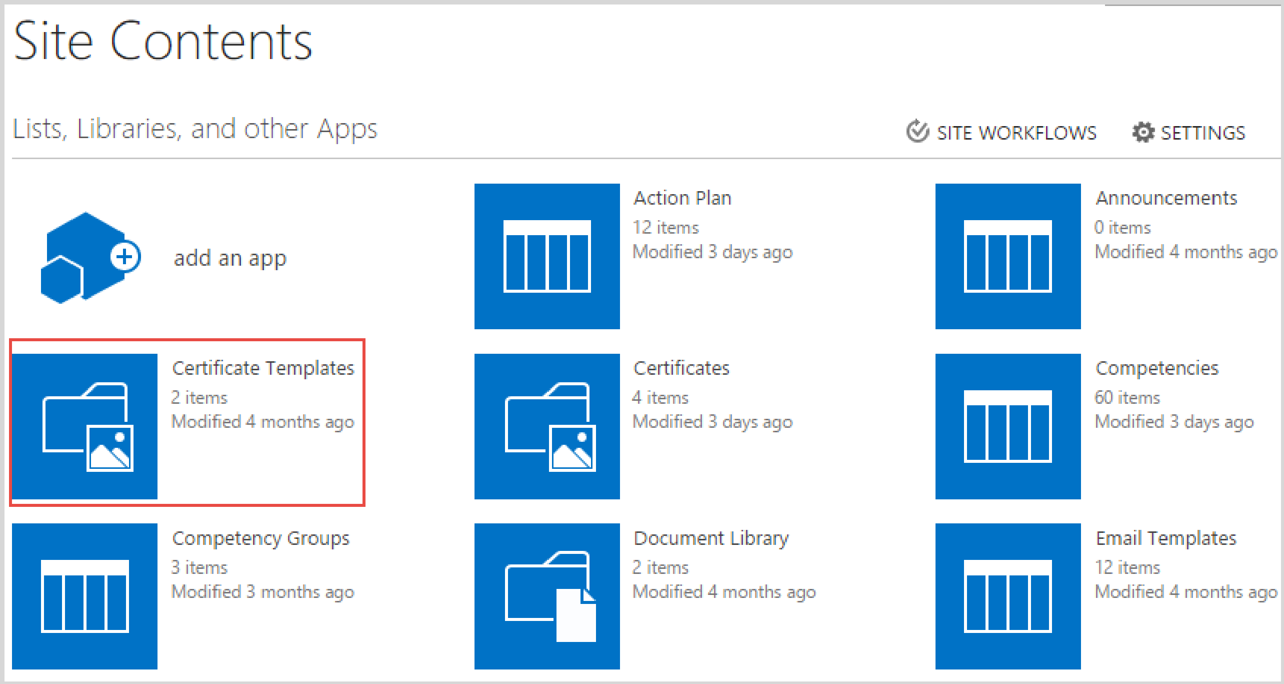
The Attachments are stored and managed in the standard SharePoint Document Libraries. The files in the SharePoint CCM are handled in the Attachment lists. Global Administrator has the full administrative control to create, modify and delete Attachments from Attachments list on the enterprise level (for 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:

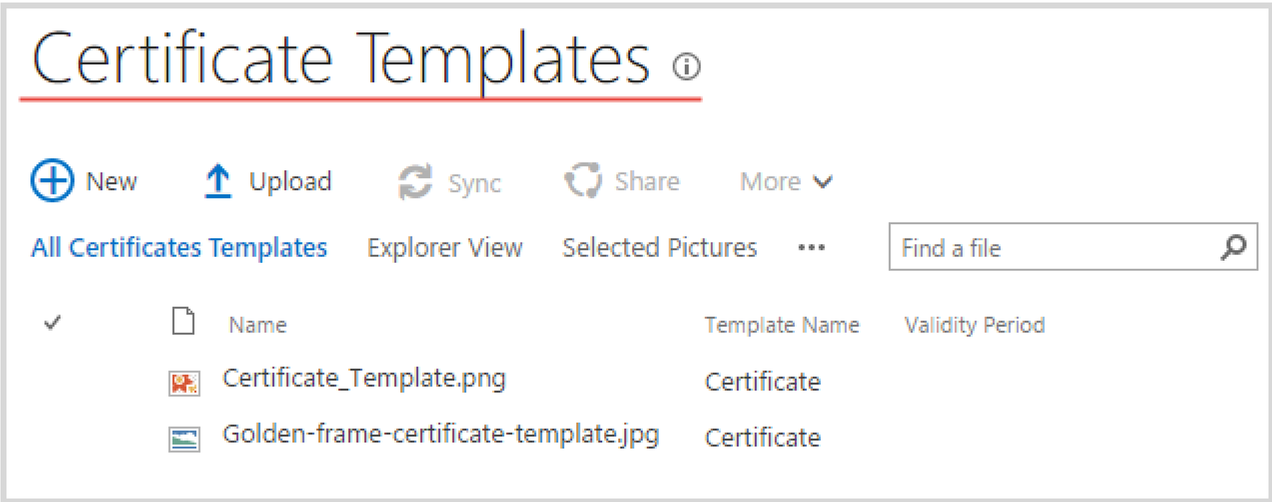
1) To access the Document Library from the Settings click Site Contents to view the full list of Document Libraries:



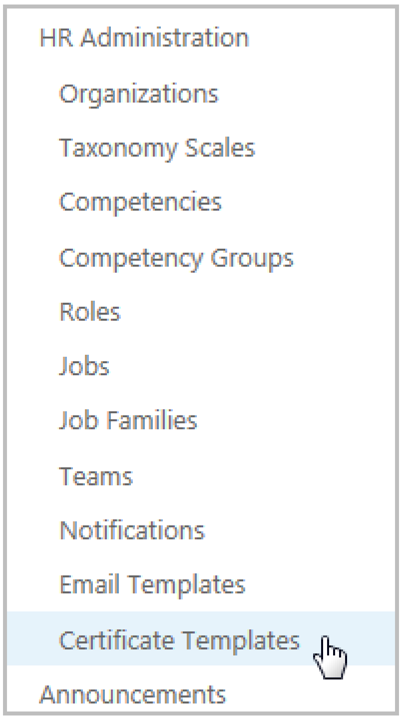
   a. Click on the name of the Document Library you want to open:



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



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

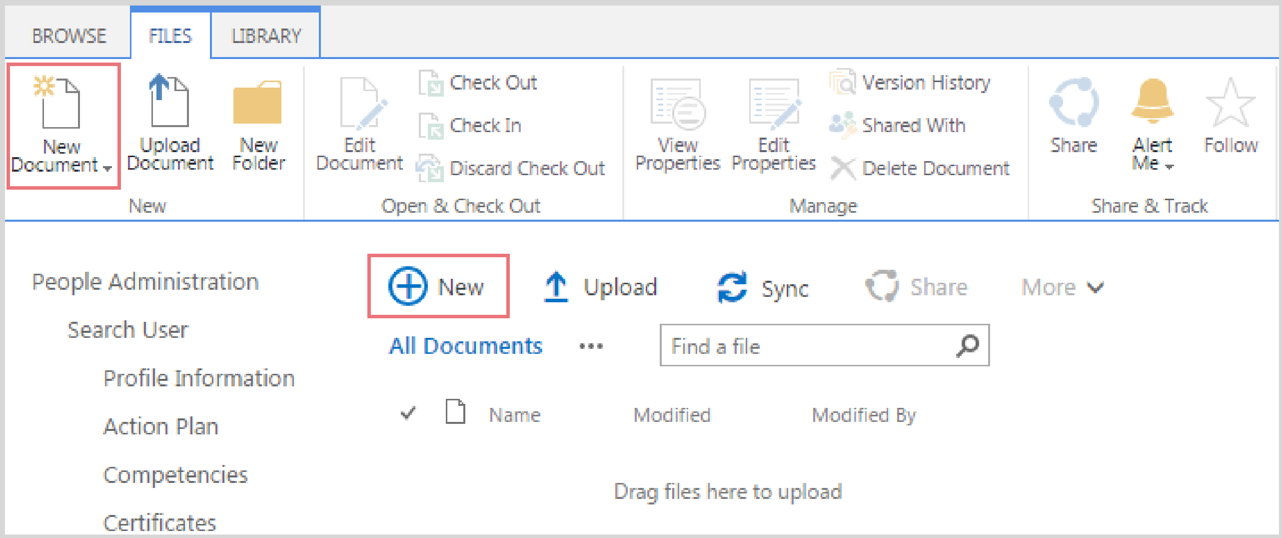
To add new document to the Document Library is a standard SharePoint functionality. To do so, follow the steps below:

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

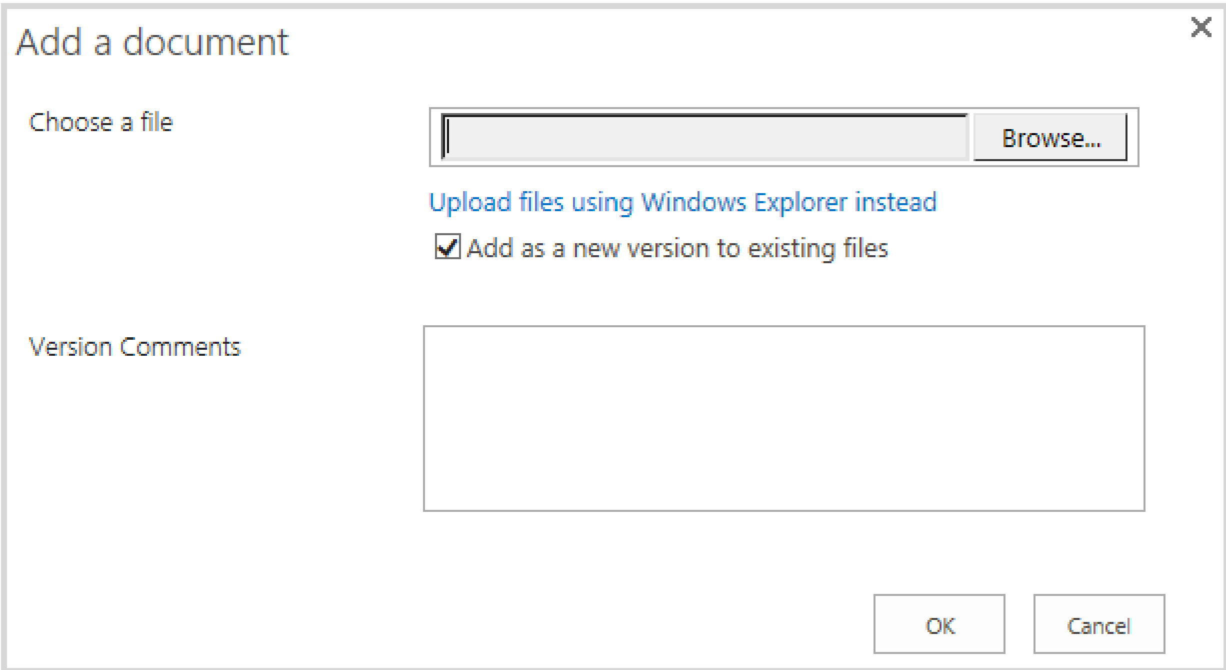
    a. From the Document Library's list click New button ;

OR

    b. On the ribbon click New Document:



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



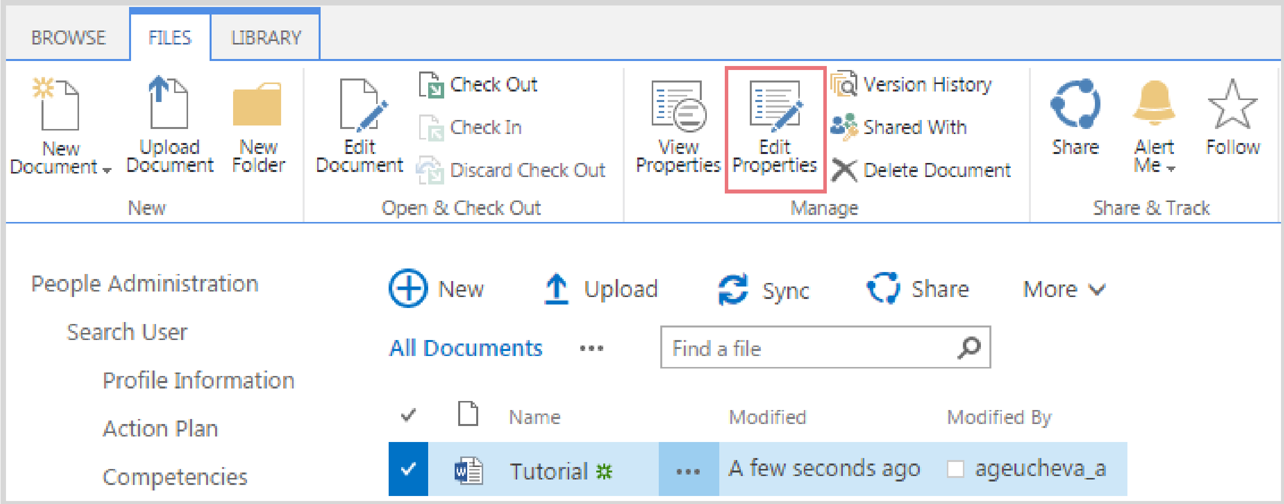
3) Click OK button to upload the selected document or click Cancel to discard the process. You will be redirected back to the list with all documents in the Document Library where newly added document's Name, Modified date and Modified By is displayed.

5.1.1 Edit Attachment's Properties

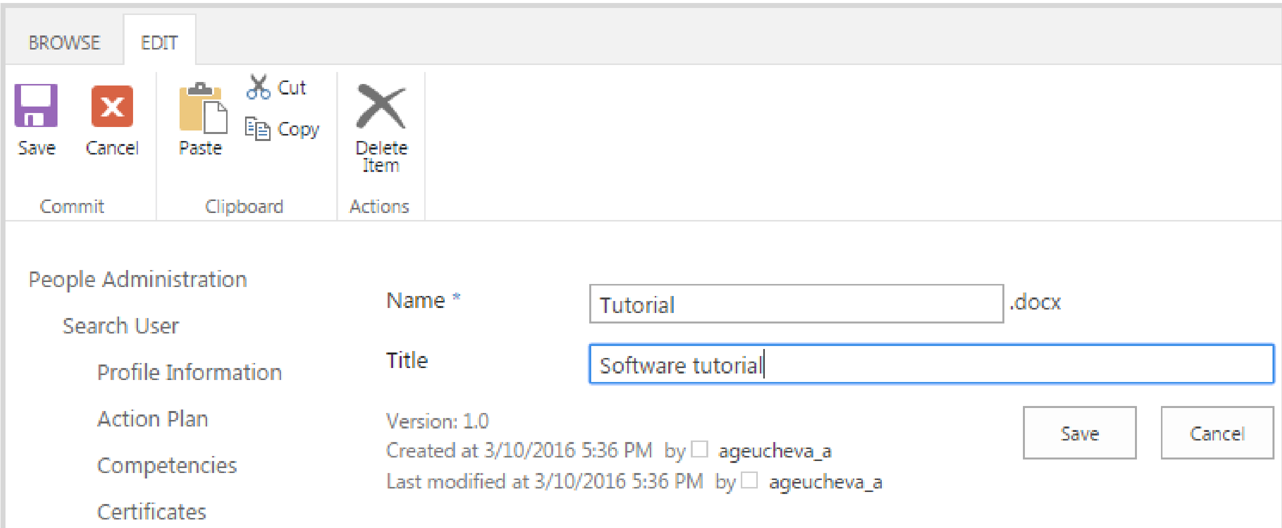
To edit the properties of the document in the Document Library is a standard SharePoint functionality. To do so, follow the steps below:

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):



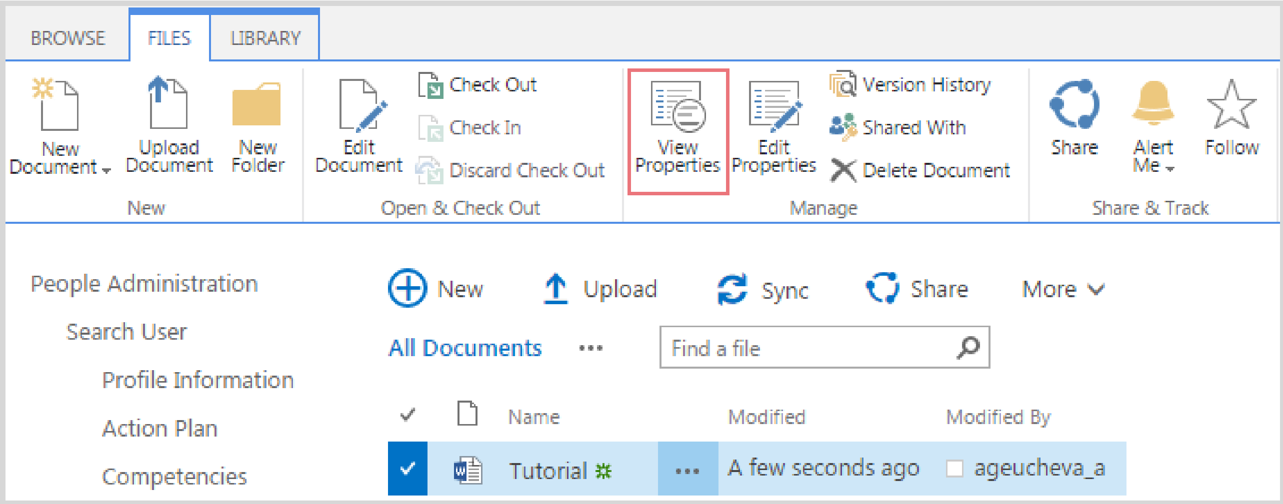
3) Click Save button to save the changes or click Cancel button to discard the process.

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

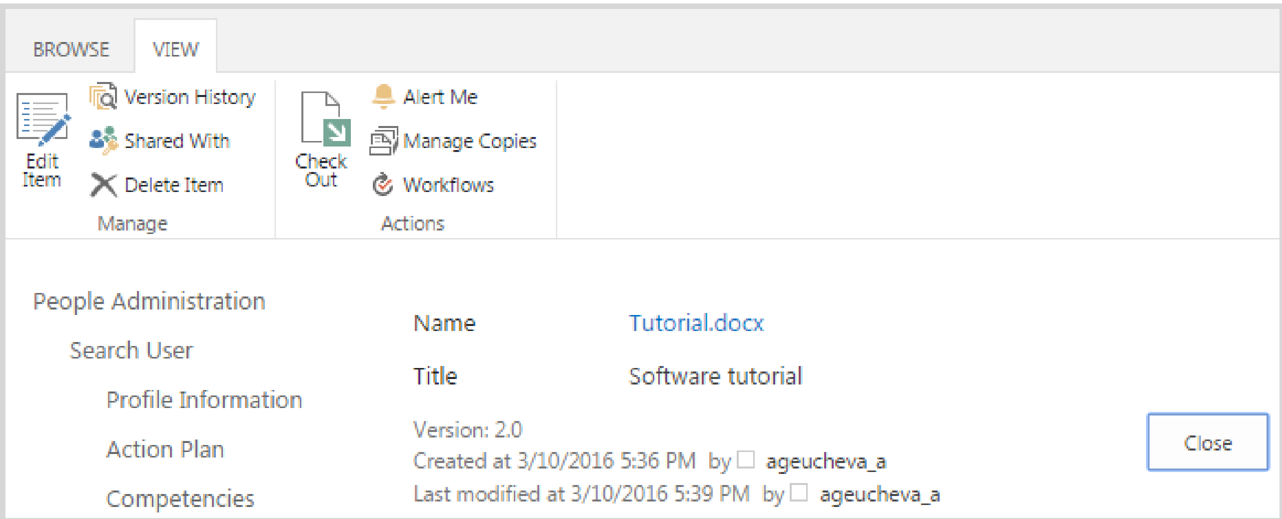
5.1.2 View Attachment's Properties

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.

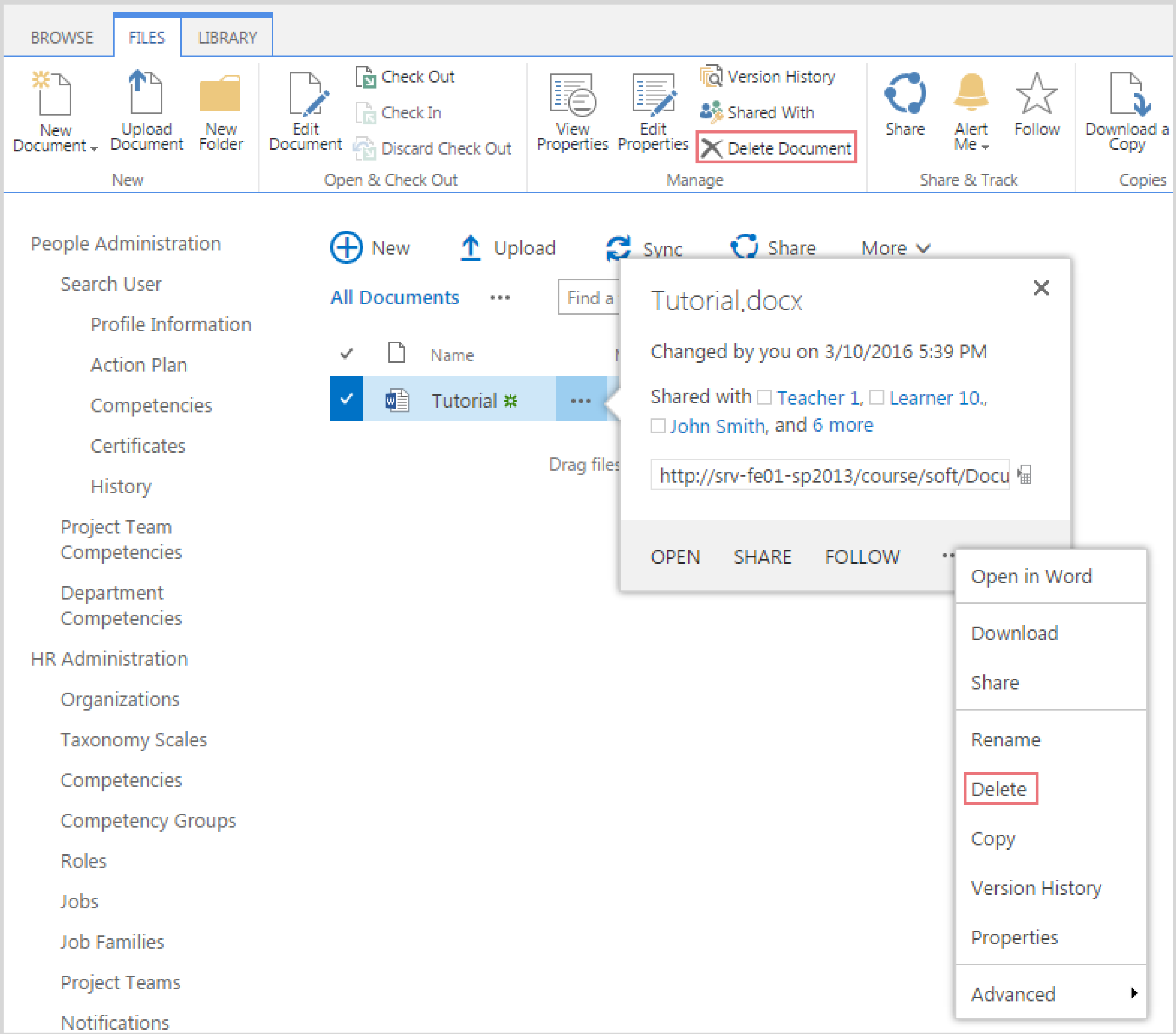
5.1.3 Delete Attachment

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

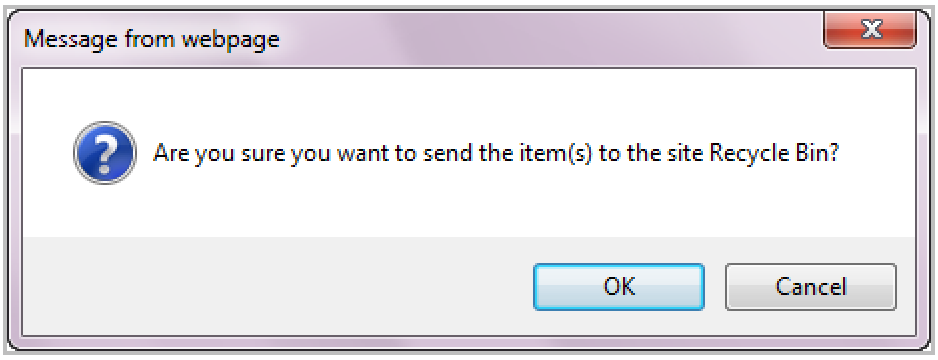
1) From the drop-down action list next to the attachment's name click Delete;

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

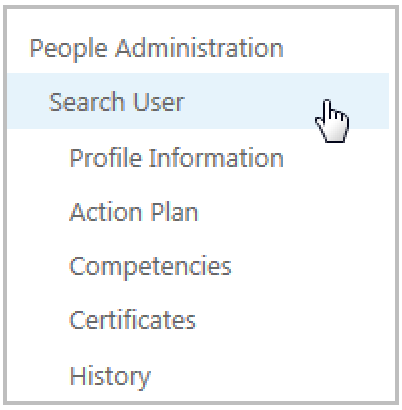
The Employee Record Keeping is the oldest and most basic human resources function. It involves recording, maintaining and retrieving the information related to employees for various organizational needs. Global Administrator has the full administrative control to define the User Profile structure, including 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.

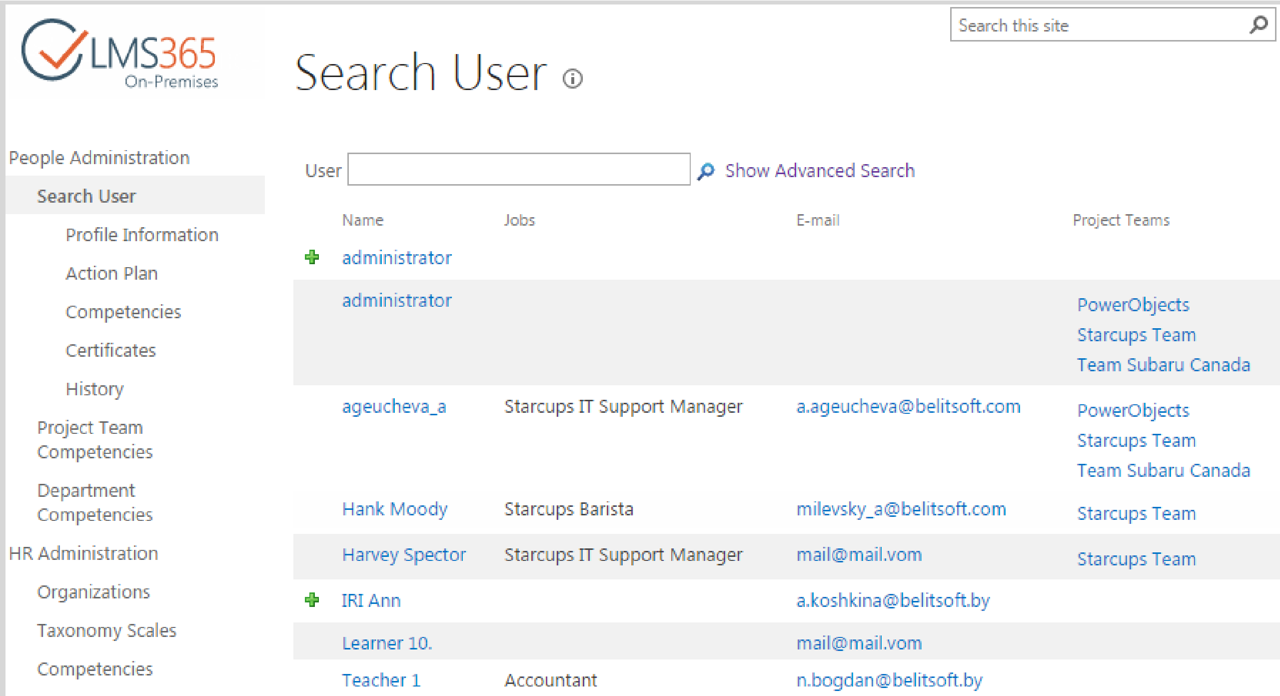
6.1 Search User

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:

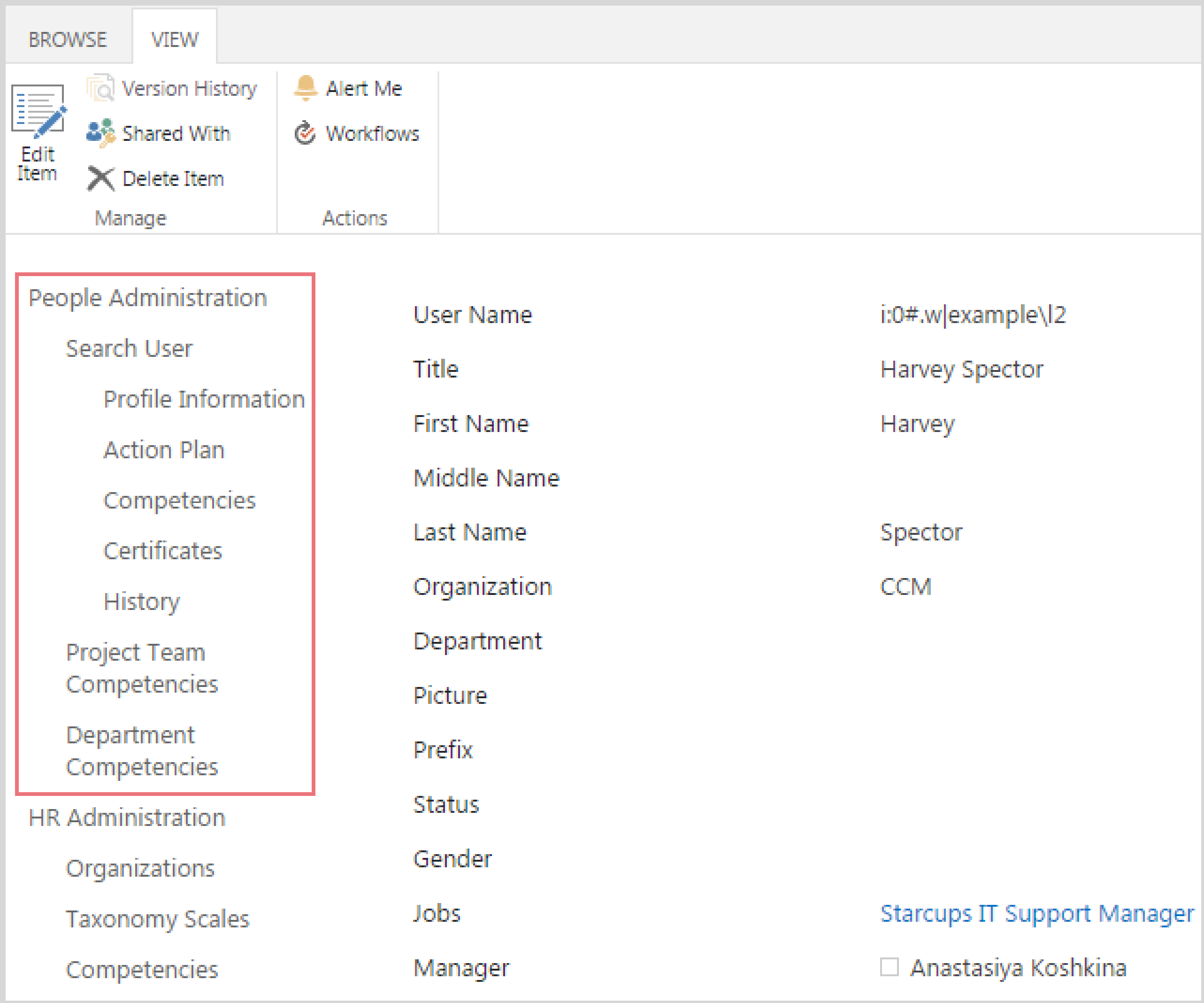


- The ( ) icon appears next to the name of the user when there is no Employee profile created for him. Click this icon to create an Employee Profile for the selected user.
- Click on the Name to select the user and place the name in the Selected User box on the right of the Search field.
- Click on the 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:

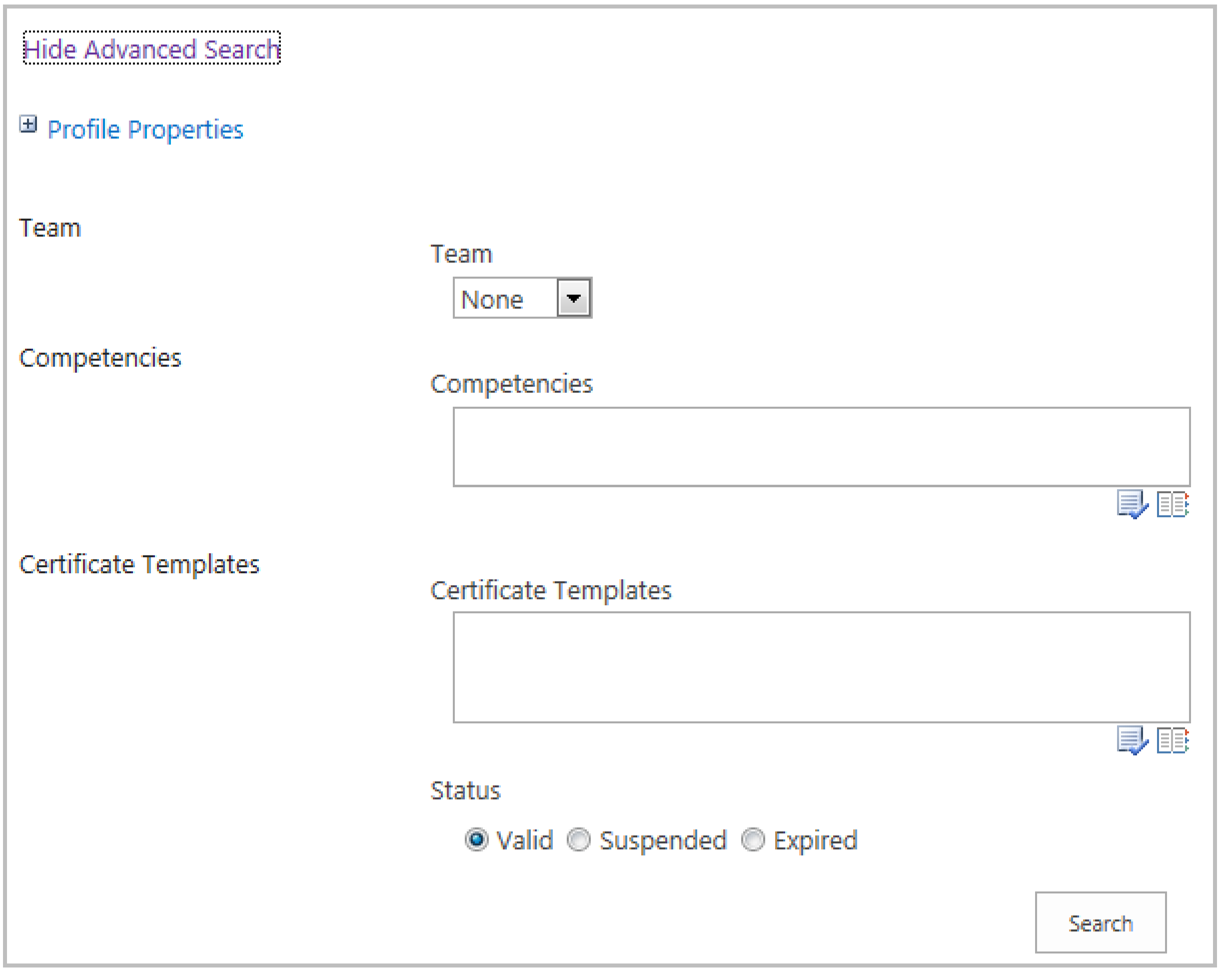


6.1.2 Advanced Search

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:



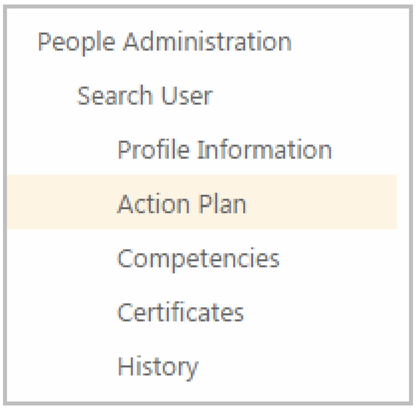
- Profile Properties – The user can fill out any or all of the profile properties and set the search to look for either one or all entered criteria;
- Project Team – the user can choose the specific project team from the drop-down to which the employee he is searching for must belong;
- Certificate Templates – 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.

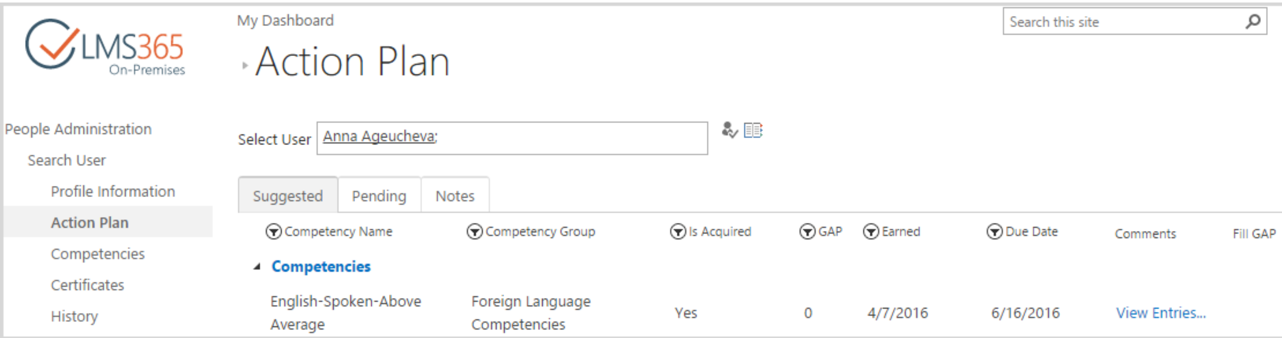
6.2 Action Plan

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:



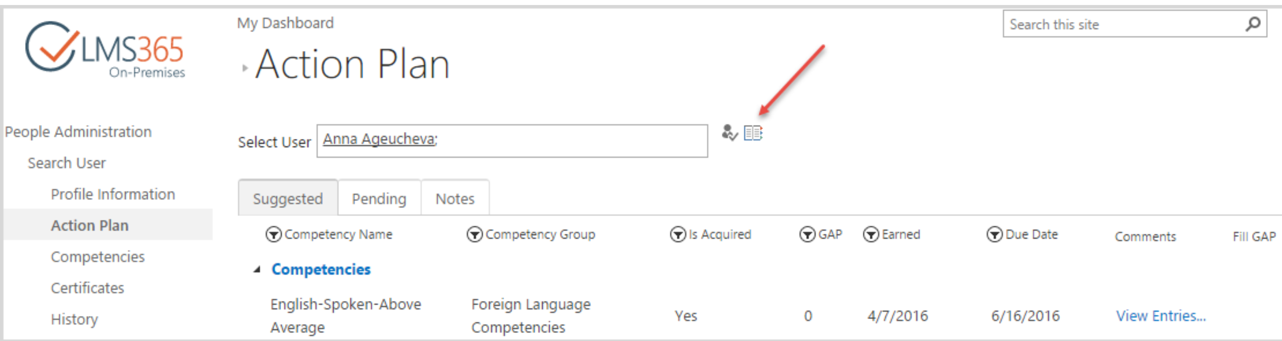
6.2.1 View Employee's Action Plan

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:

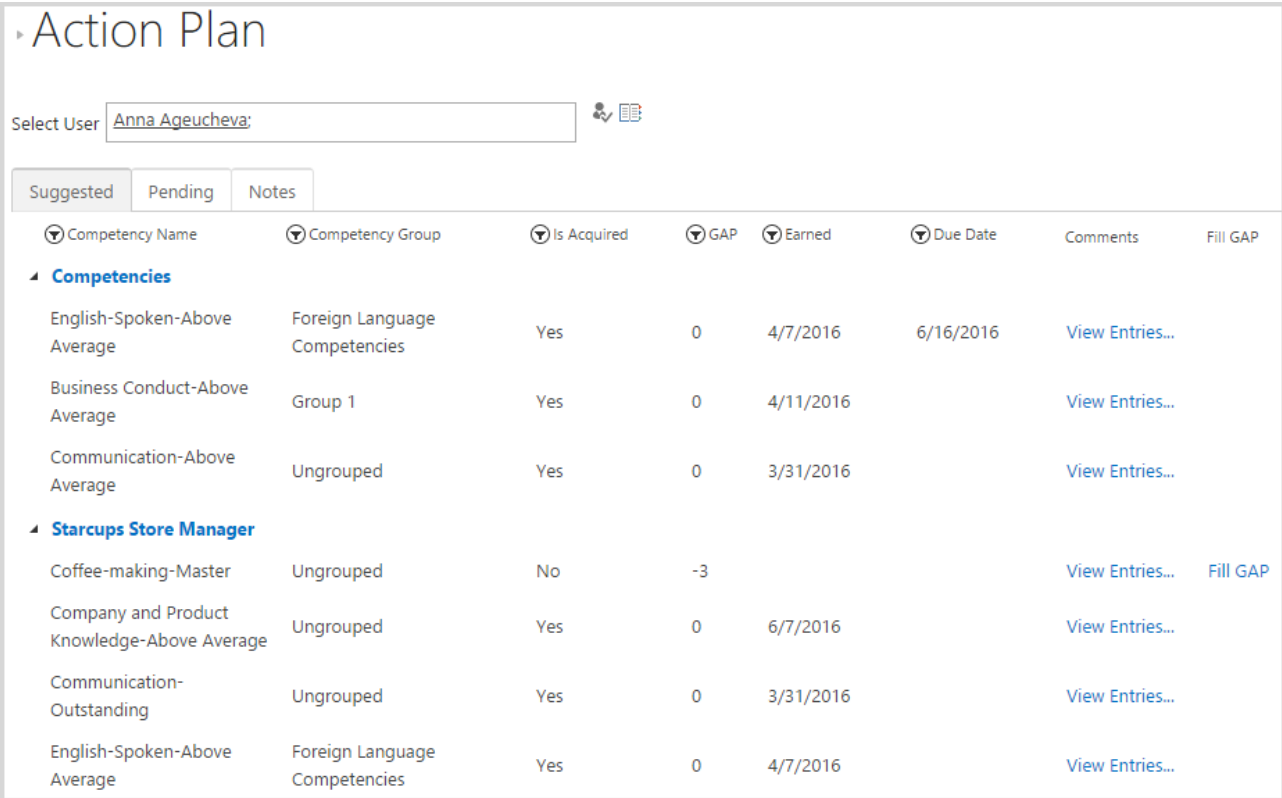


Note, please, that in case if the user searches for the employee for whom the Action Plan has NOT been created, the system will automatically create the Action Plan for this employee once the user clicks Go to Action Plan button.

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:



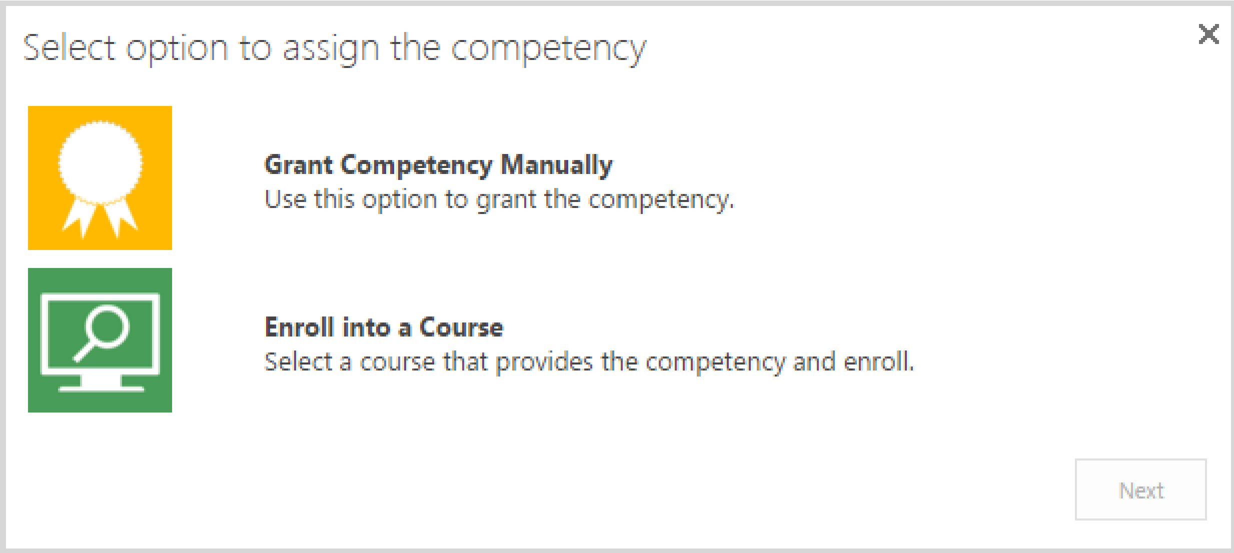
Action Plan

Select User Anna Ageucheva;

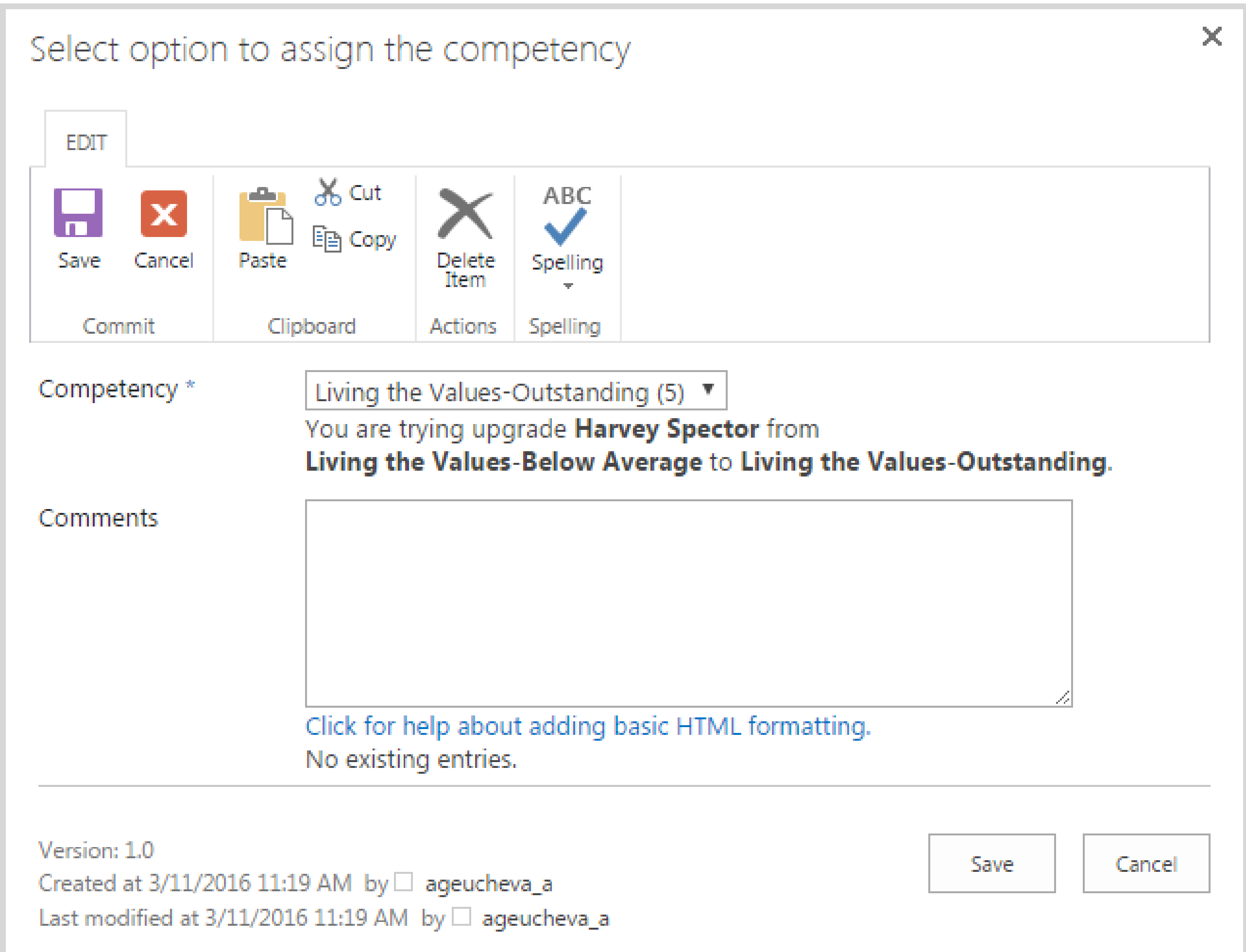
Suggested | Pending | Notes

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...	
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...	

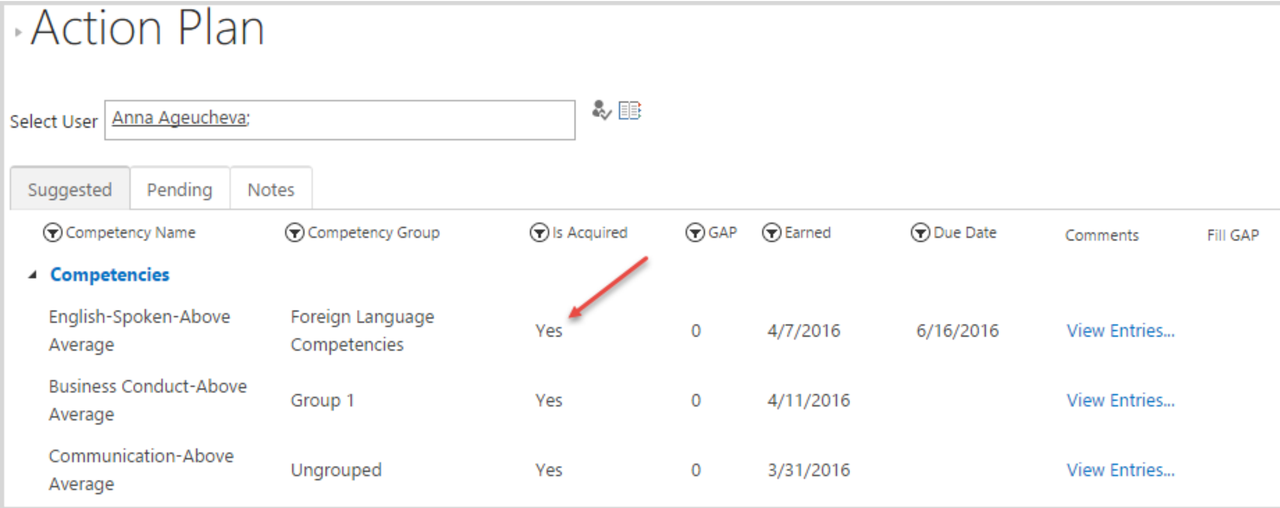
  - Competency Name – the name of the suggested Competency (and its Level);
  - Competency Group – name of group in which the competency is included;
  - Is Acquired – shows whether the suggested item has been acquired by the employee or not yet;
  - Gap – shows the difference between held competency level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



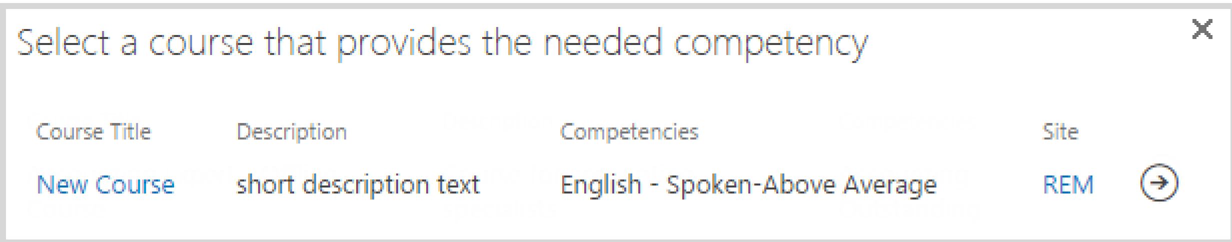
If you select to Grant Competency Manually, a warning is displayed to the User notifying that he is upgrading the Competency's Level. The Competency with the required level is already selected in the Competency field:



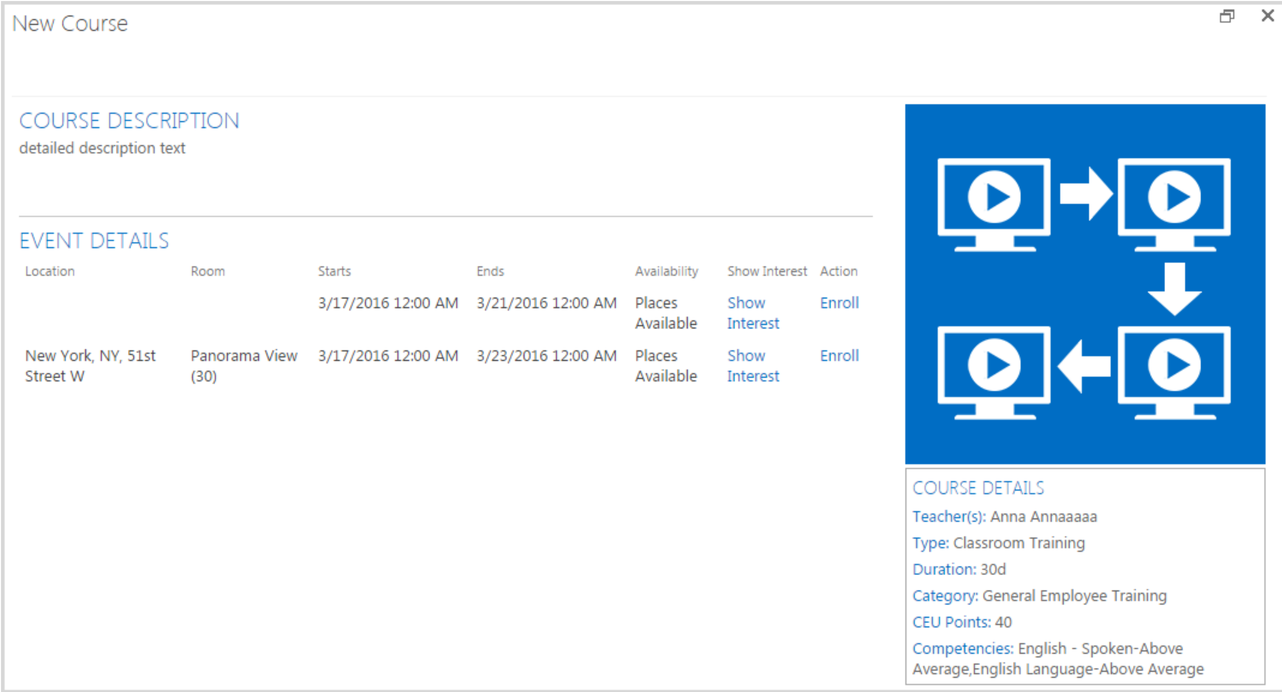
Click Save button to assign the Competency or Cancel button to discard the process. The User is redirected back to the Action Plan page with the upgraded User Level for the Competency and Acquired status 'Yes':



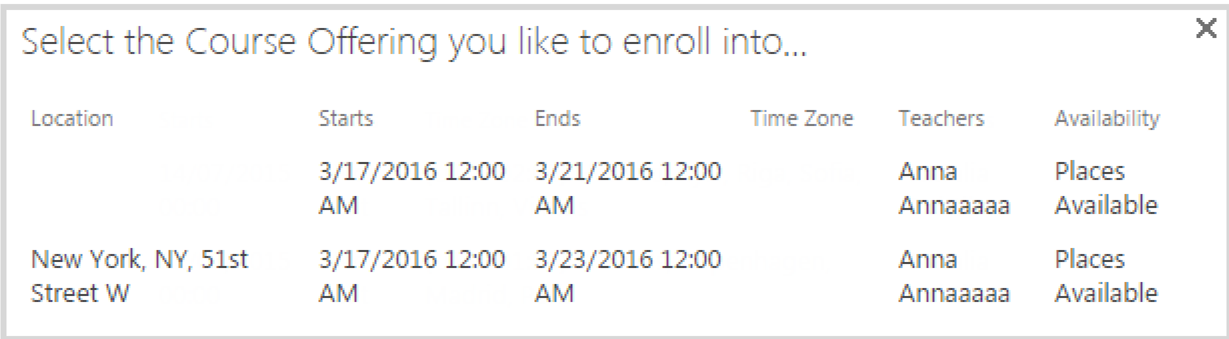
If you select to Enroll into a Course, the system will show a list of courses that provide the needed Competency level:



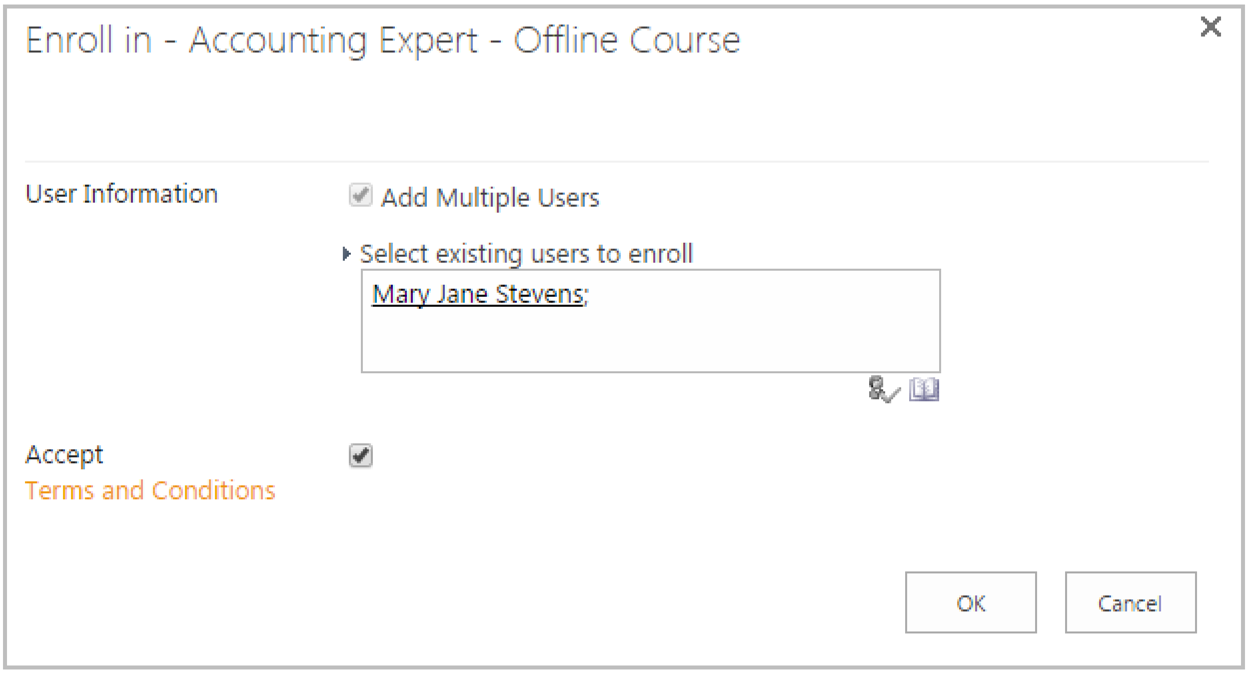
Click the Course Title link to view Course Details page in modal window where you can view more information about the course:



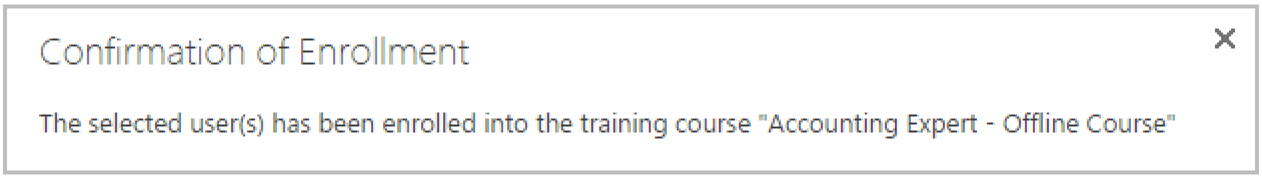
After you close the modal window, you can proceed with enrollment. Select the needed course and select Course Offering for enrollment (if several are available):



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



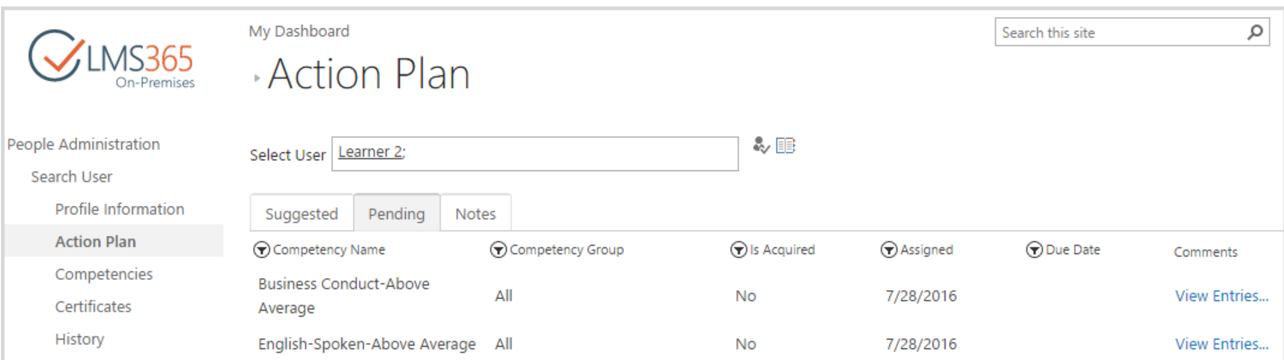
Click OK button to enroll the user to course or Cancel button to discard the process. An Enrollment Confirmation message without any redirect buttons is displayed to confirm successful enrollment:



NOTE:	Manager can enroll himself and his subordinates only.

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

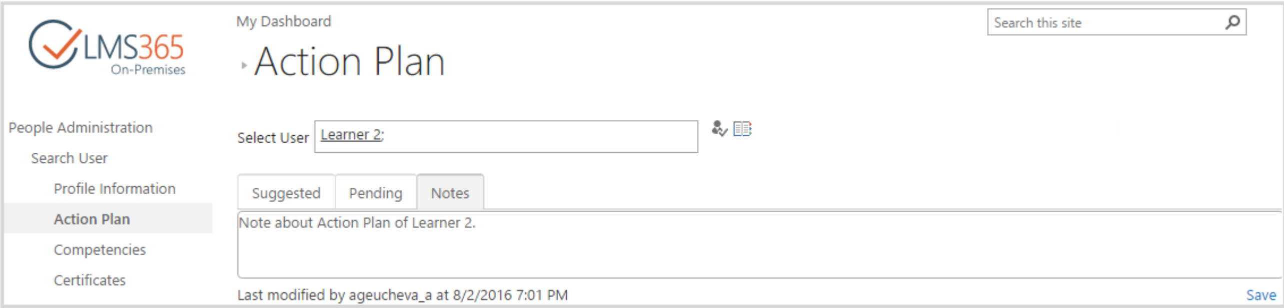
- *Pending* tab displays competencies that are being acquired via SharePoint REM Courses:



  - 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.

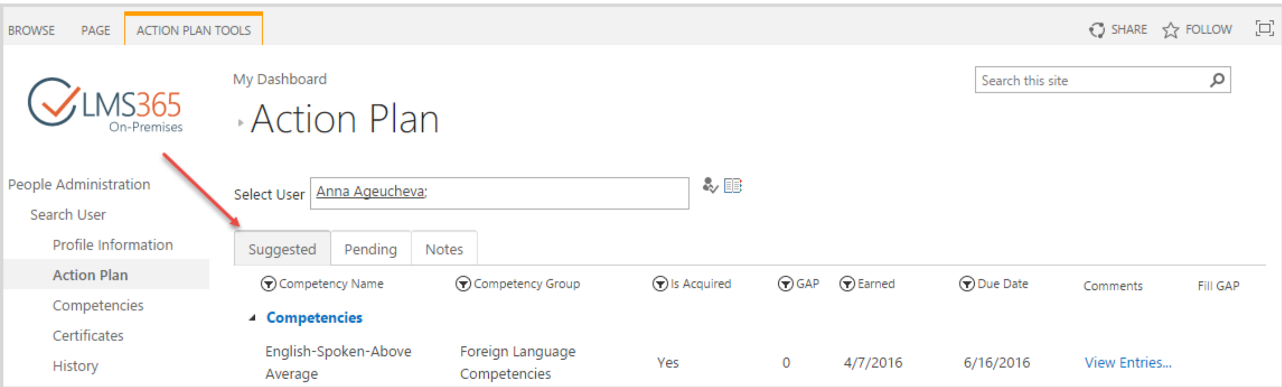


6.2.2 Add New Item to Action Plan

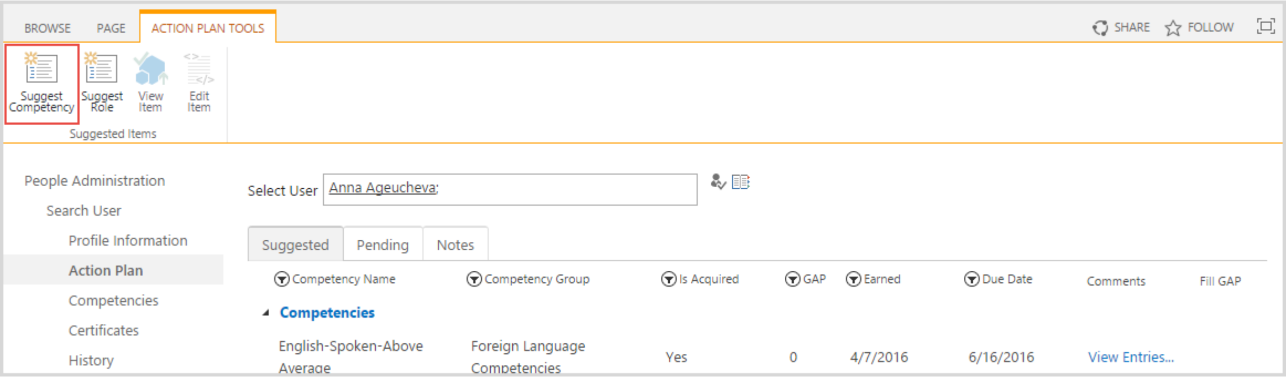
Two types of items can be added to action plan: competencies and roles.

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

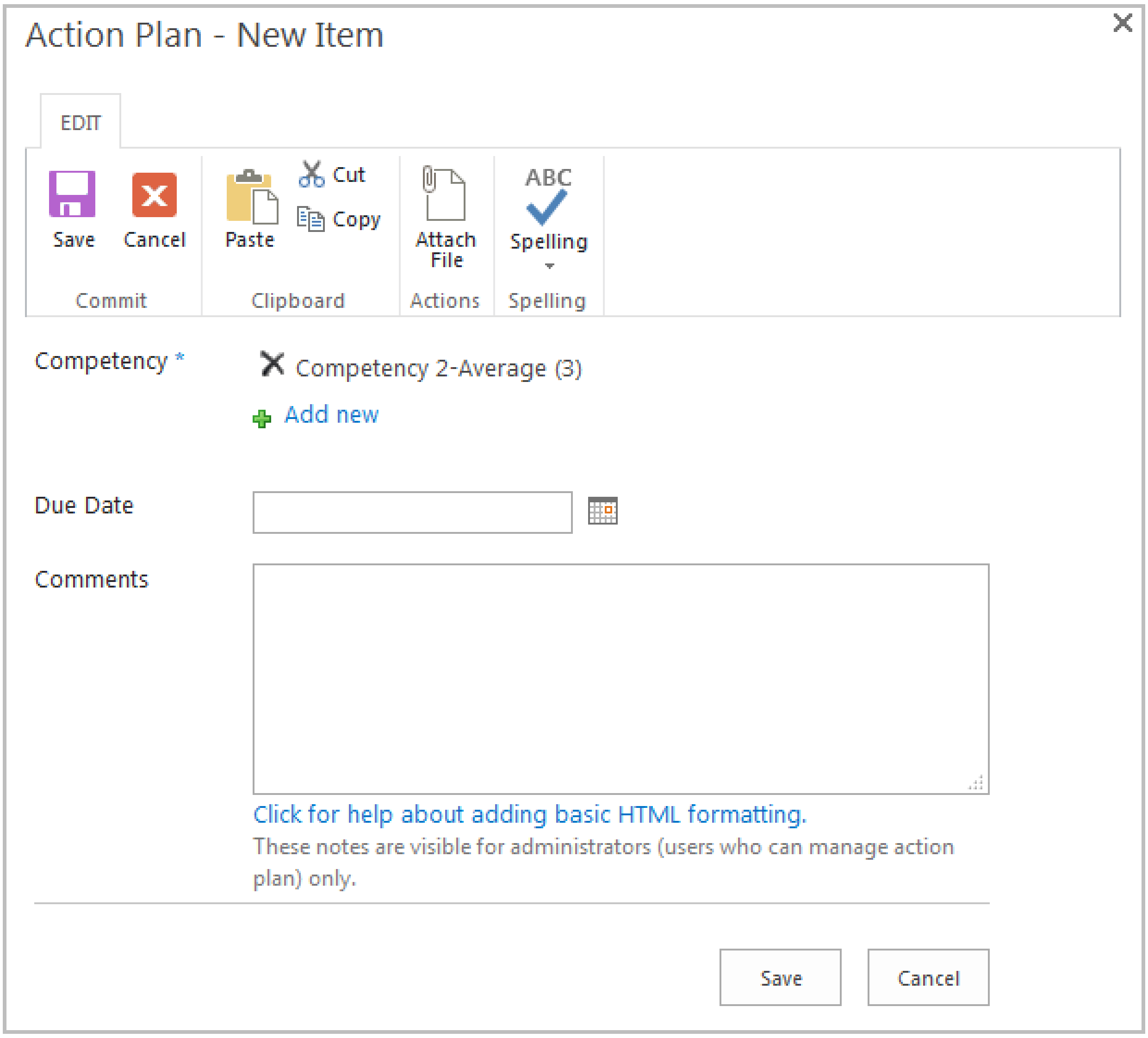
1) Go to employee's Action plan, select Suggested tab:



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



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

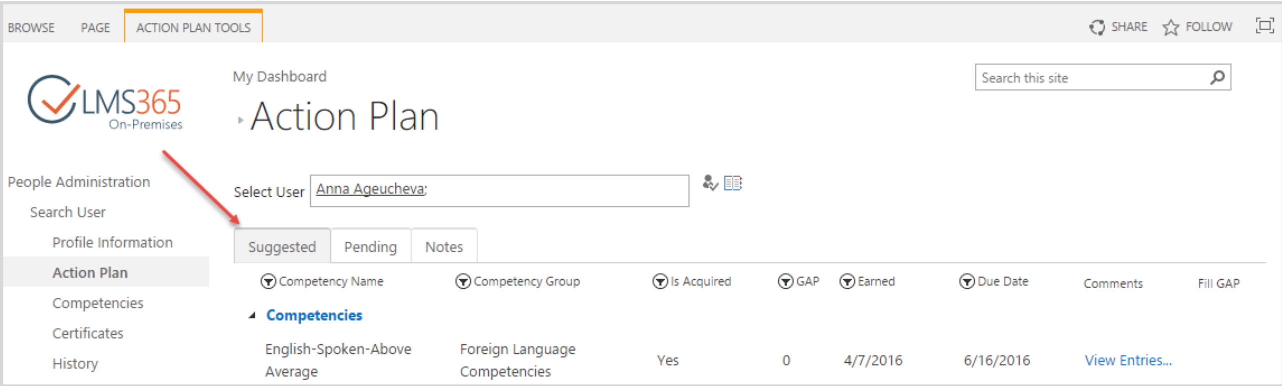


a. Add Competency using competency picker;
b. Optionally choose the date by which the suggested item should be acquired;
c. Optionally add any comments that may explain the reason for suggesting an item;

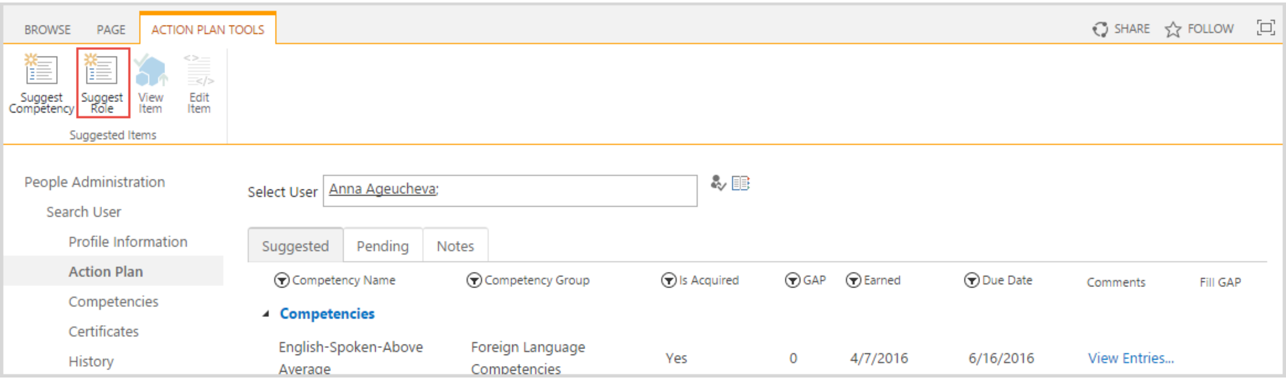
d. Click Save button to add new item to the Action Plan or click Cancel button to discard the process.

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

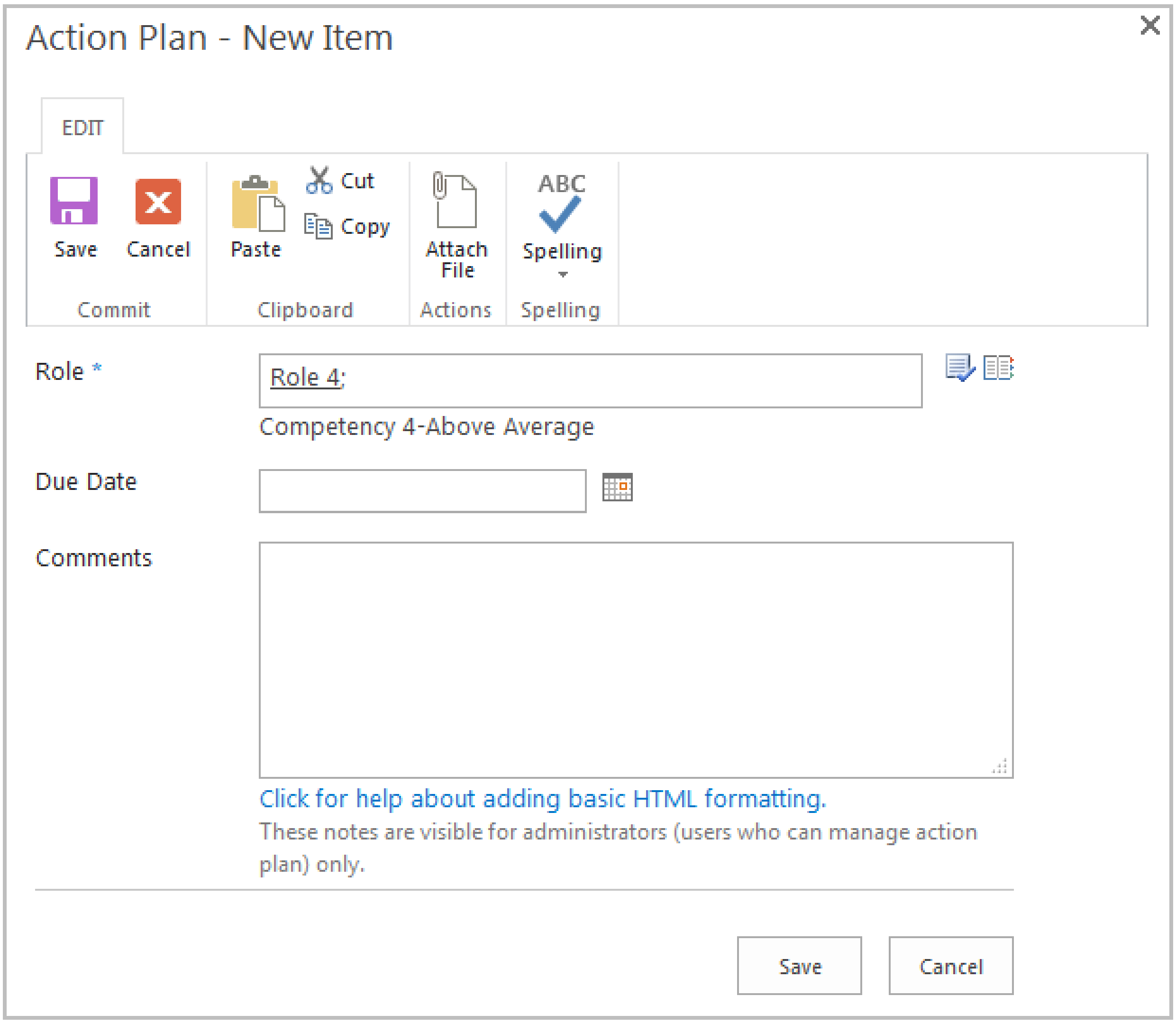
1) Go to employee's Action plan, select Suggested tab:



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



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



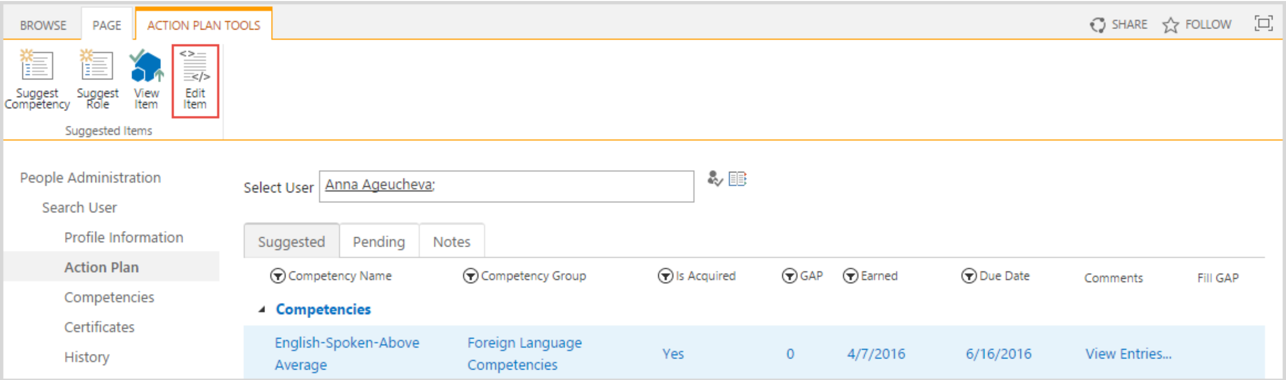
a. Enter the title of the Role or pick the name from the list via Browse icon to the right of the title field;
b. Optionally choose the date by which the suggested role should be acquired;
c. Optionally add any comments that may explain the reason for suggesting an item;
d. Click Save button to add new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

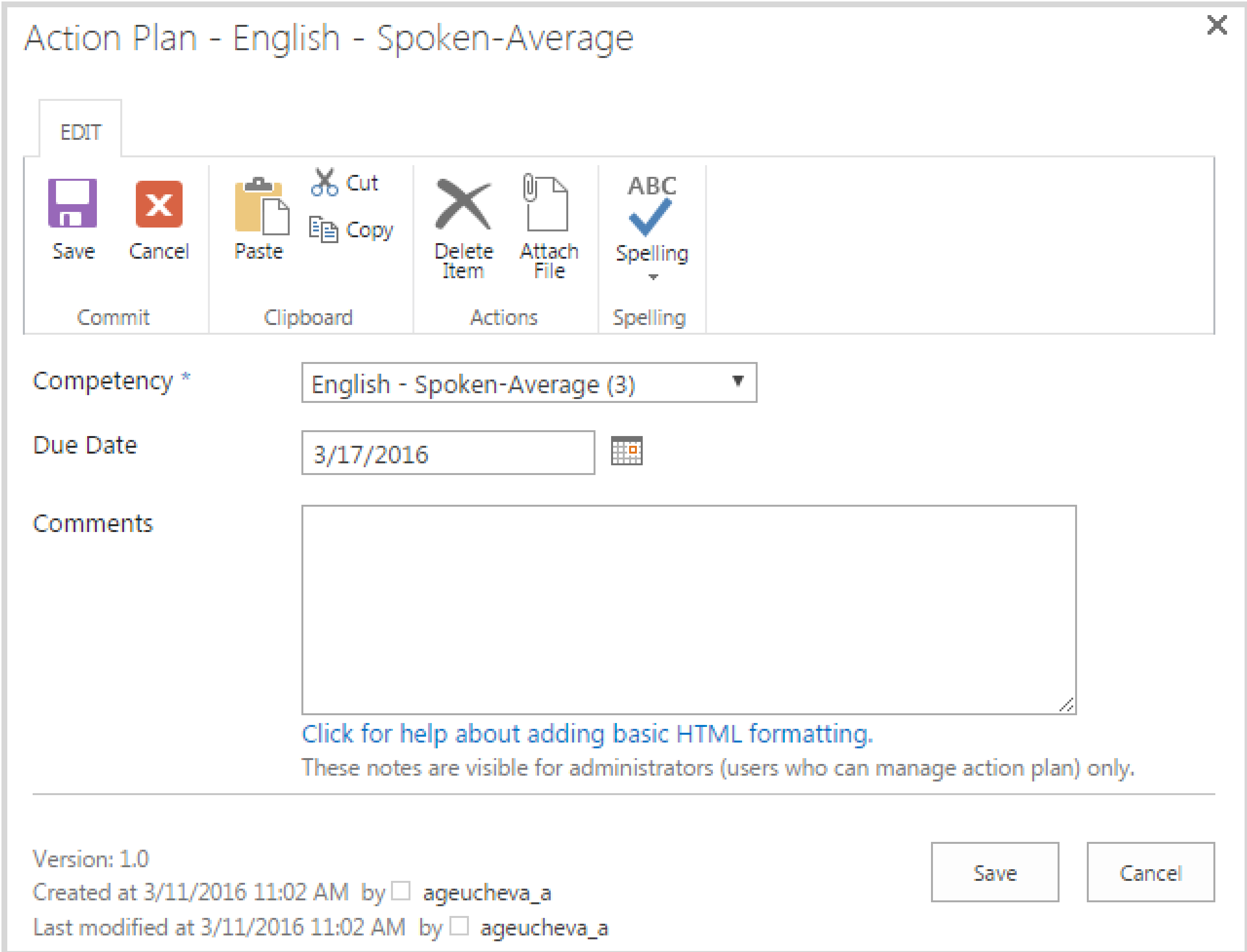
6.2.3 Edit Suggested Item in Action Plan

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:



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



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.

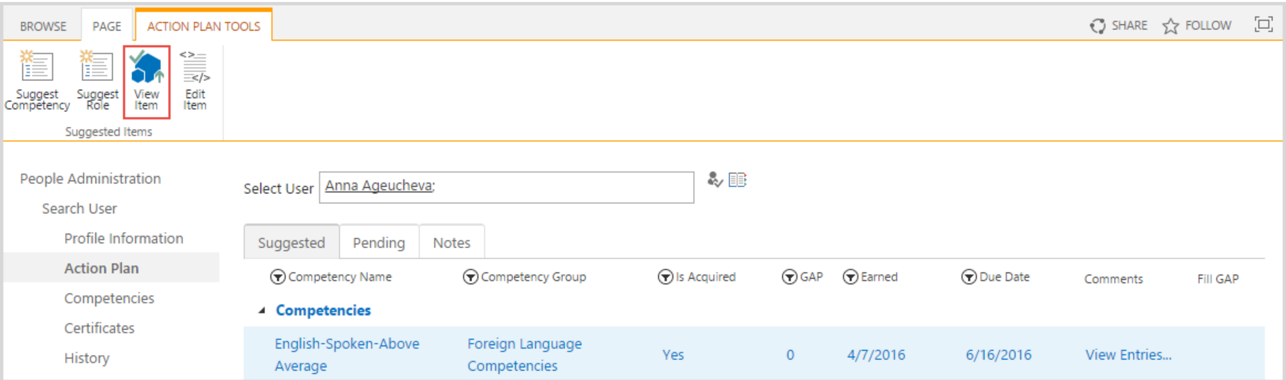
6.2.4 View Suggested Items details

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

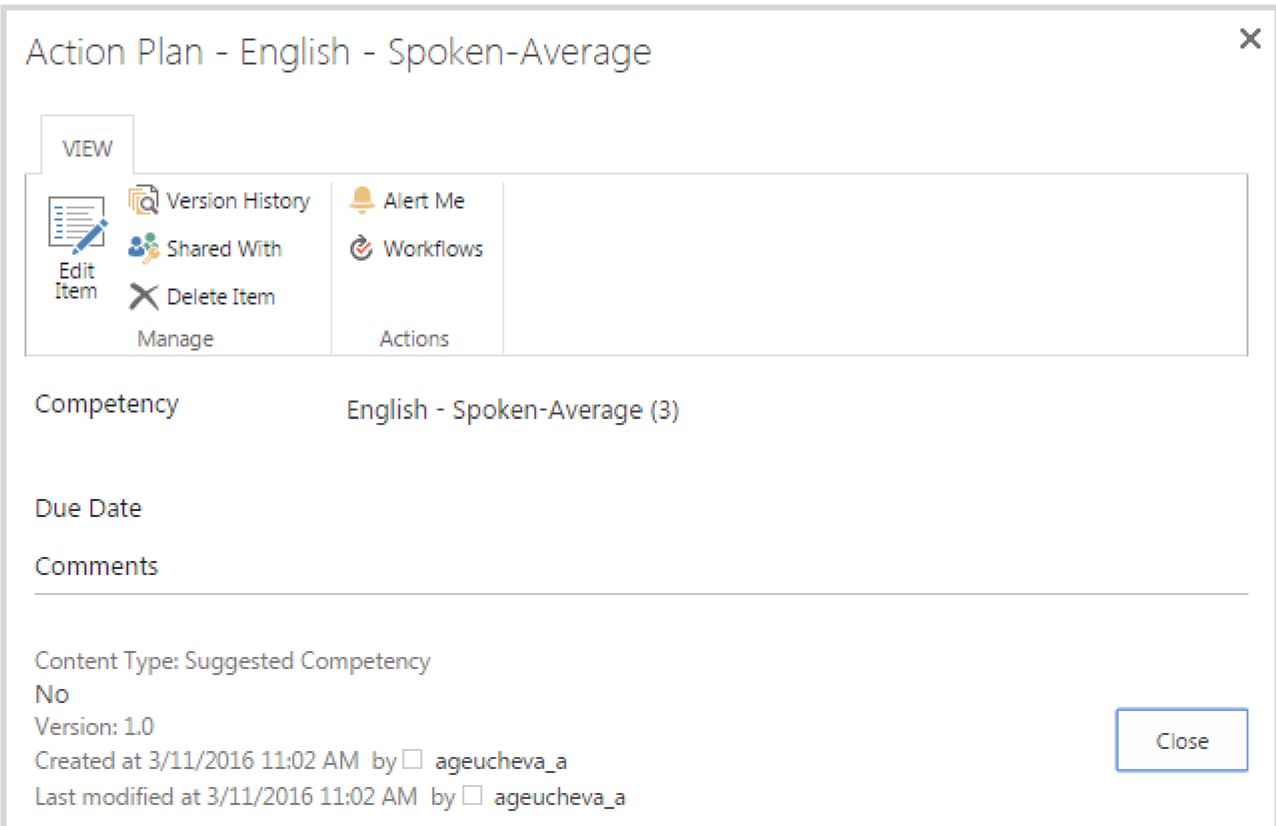
1) Click on the item's Title;

OR

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



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:

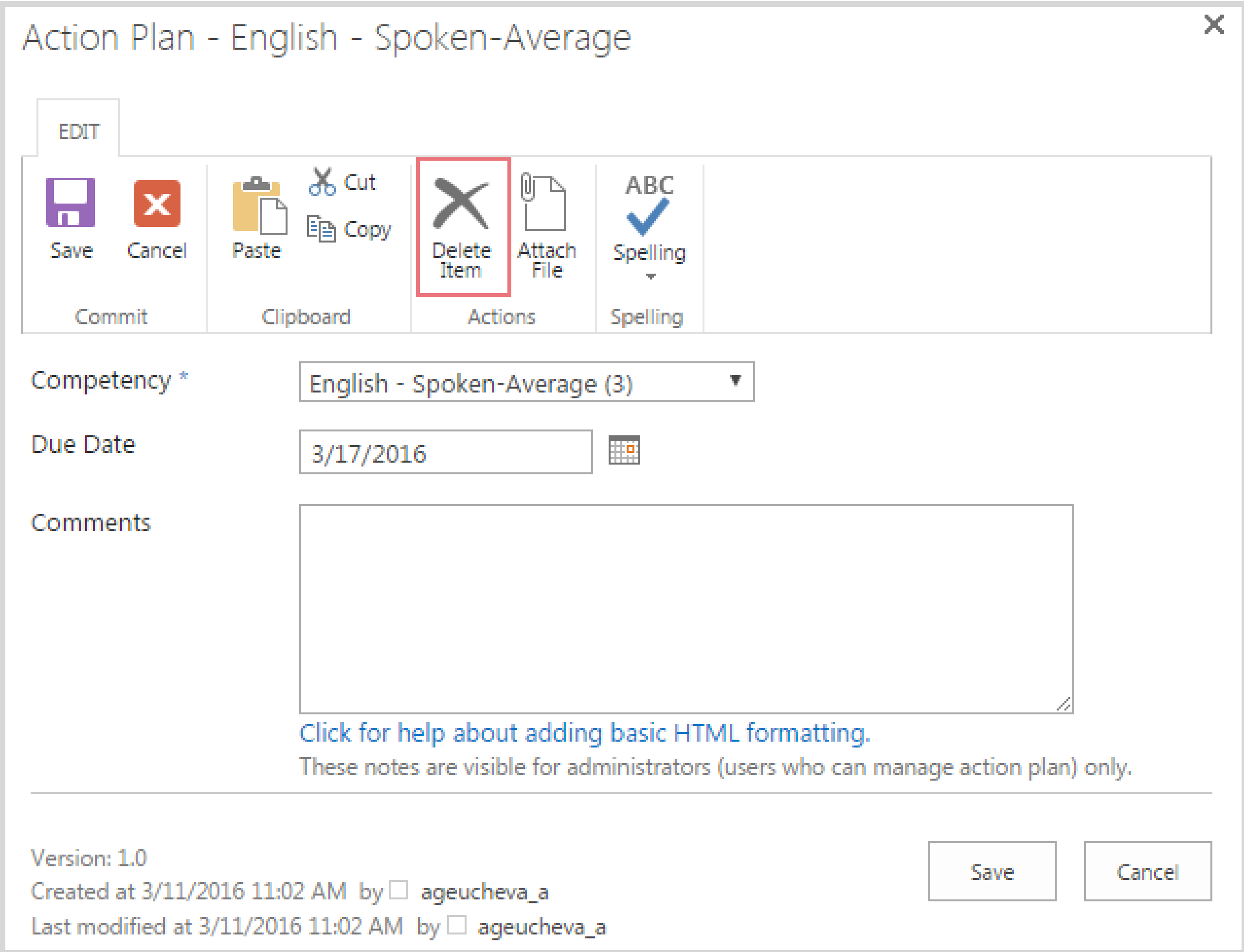


4) Click Close button to return to the employee's Action Plan list.

6.2.5 Delete Suggested Item from the Action Plan

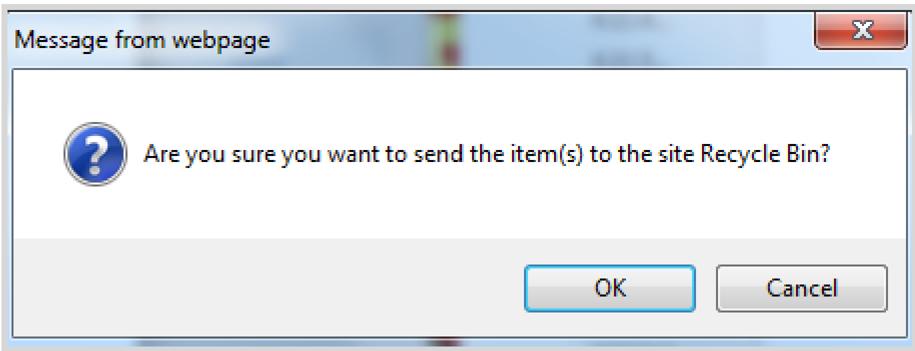
To remove a suggested item from the Action Plan, manager follows the steps below:

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



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:



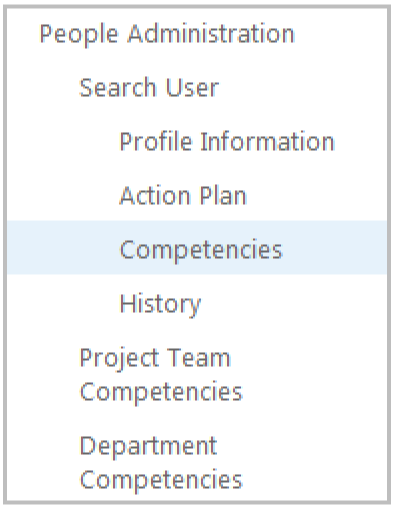
4) Confirm the decision by clicking OK button or click Cancel button to discard the process.

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.

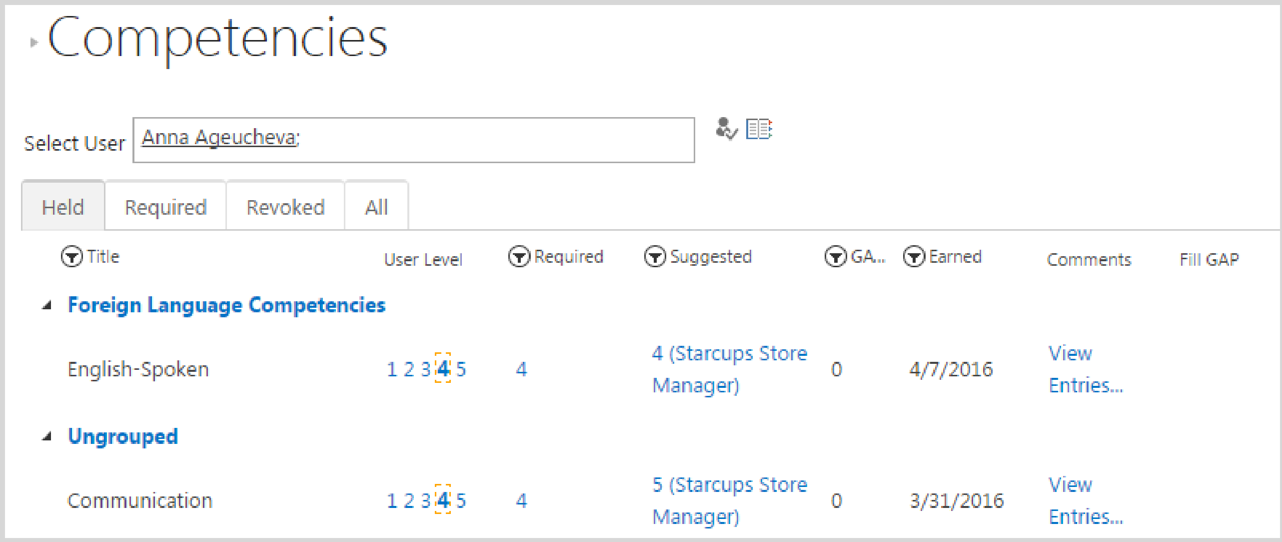
To assess employee's competencies, the user should go to Personal Competencies page where he will be able to search for an employee who's Competency Gap he wants to assess:

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:



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;

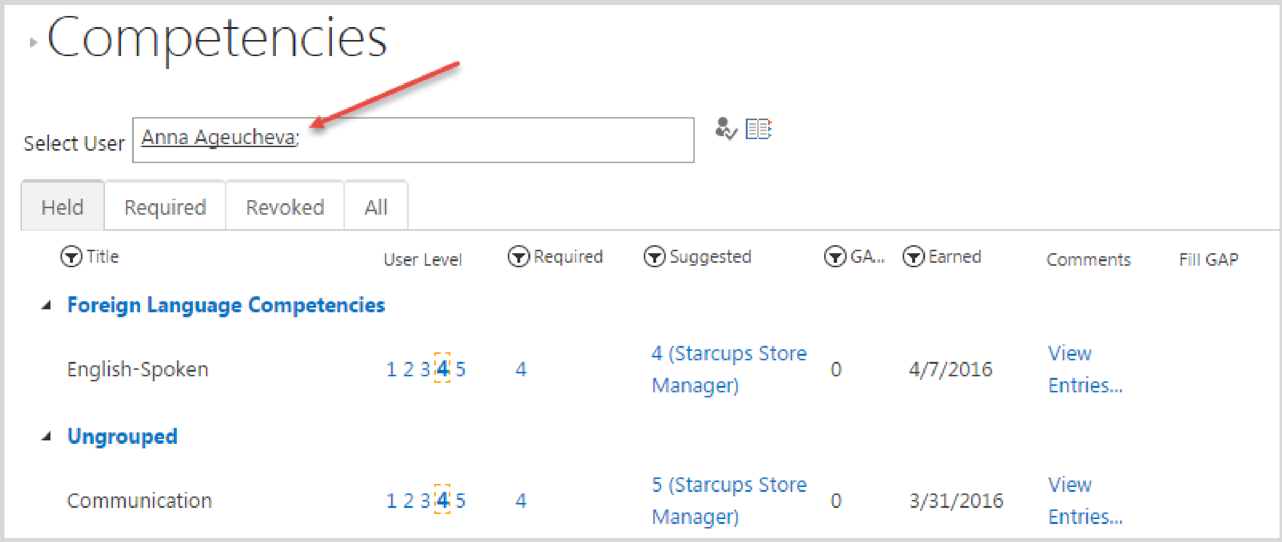
NOTE:	An option to automatically revoke competencies when certificate expires is available during course creation in Certificate Expiration settings. For detailed information about this option see <u>chapter 4.1.9.1 in LMS365 On-Premises REM User Guide.</u>

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

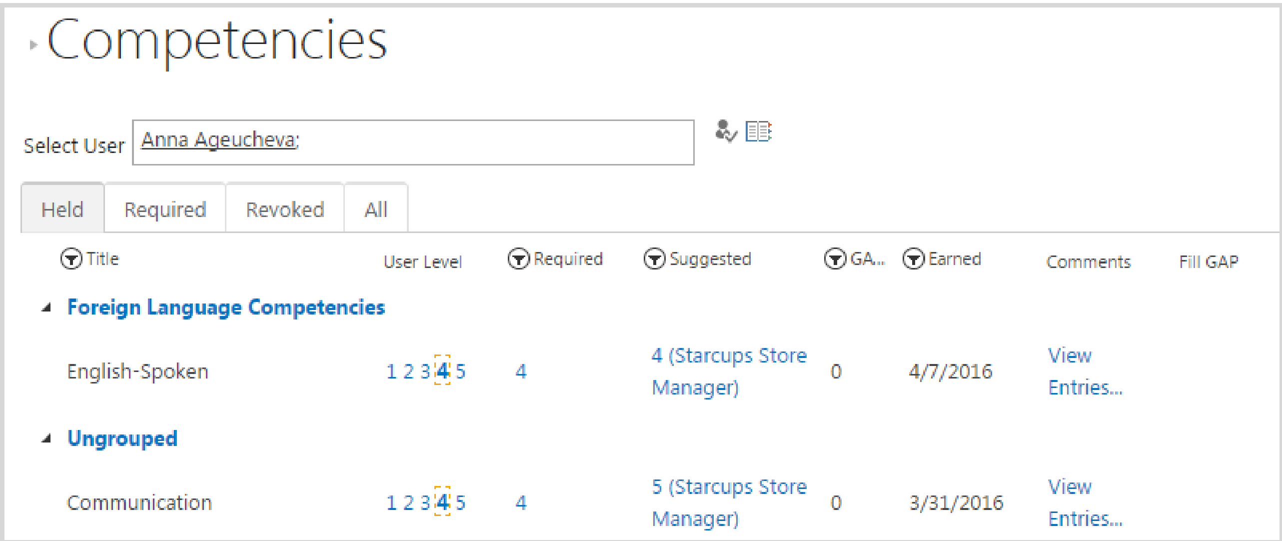
6.3.1 View Employee's Personal Competencies

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:



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

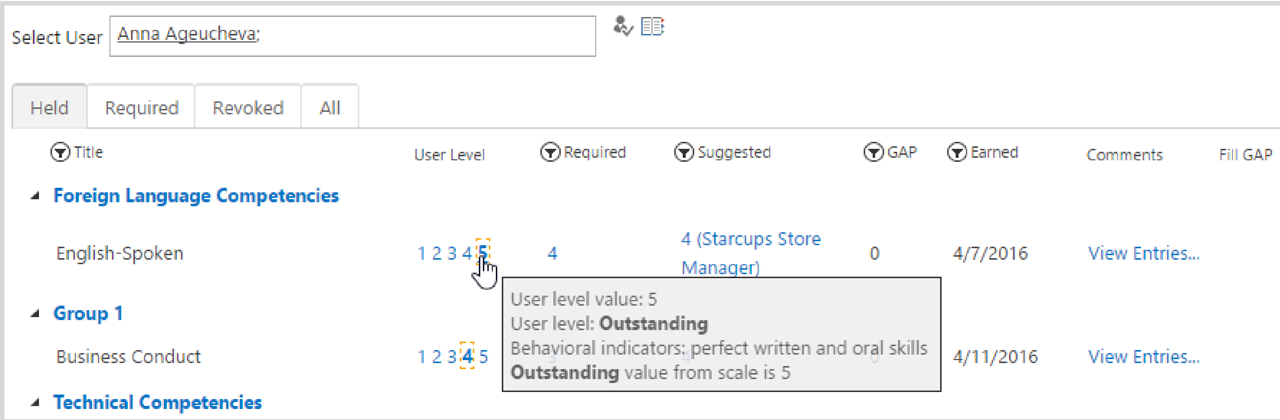


- Title – the name of the Competency. Items are grouped by Competency Group;
- User Level – the Competency Level that is currently held by an employee (the level is marked by a colored frame);
- Required – the Competency Level that is required for the Job the employee holds;
- Suggested – the Competency 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 >= 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).

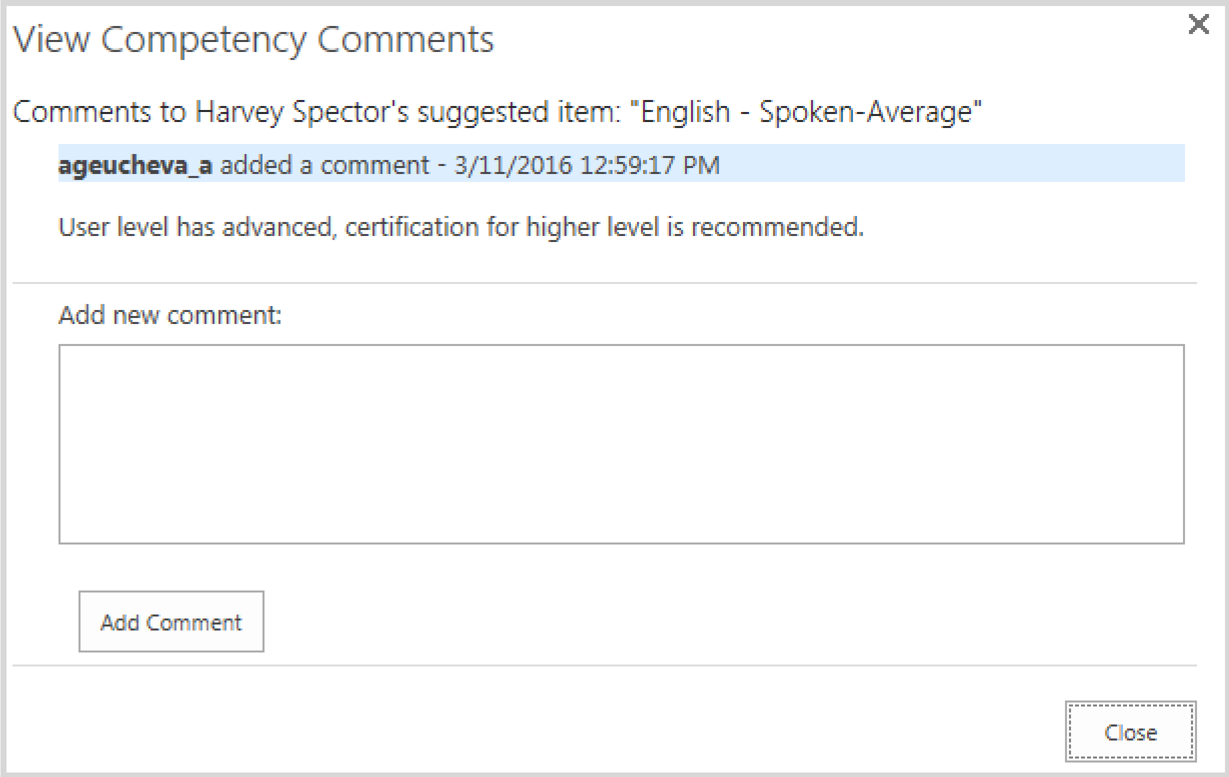
6.3.1.1 View User Level Details

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:



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:

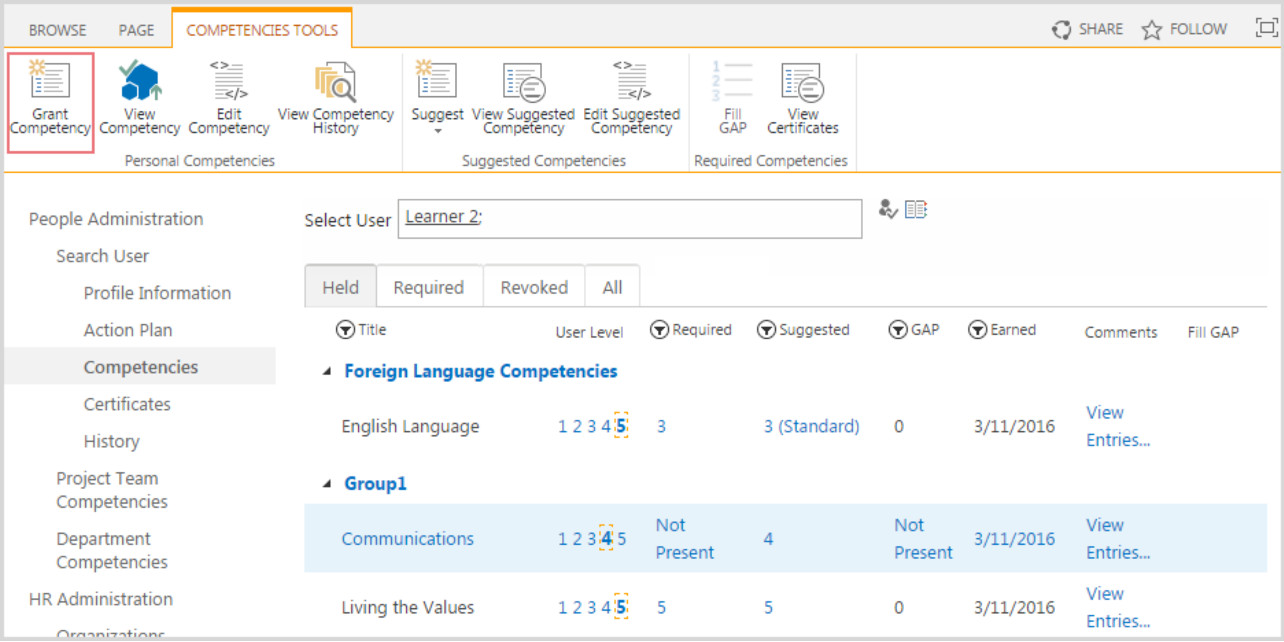


1) Write a new Comment in the Comments;
2) Click Save button to add a Comment or Cancel button to discard the process.

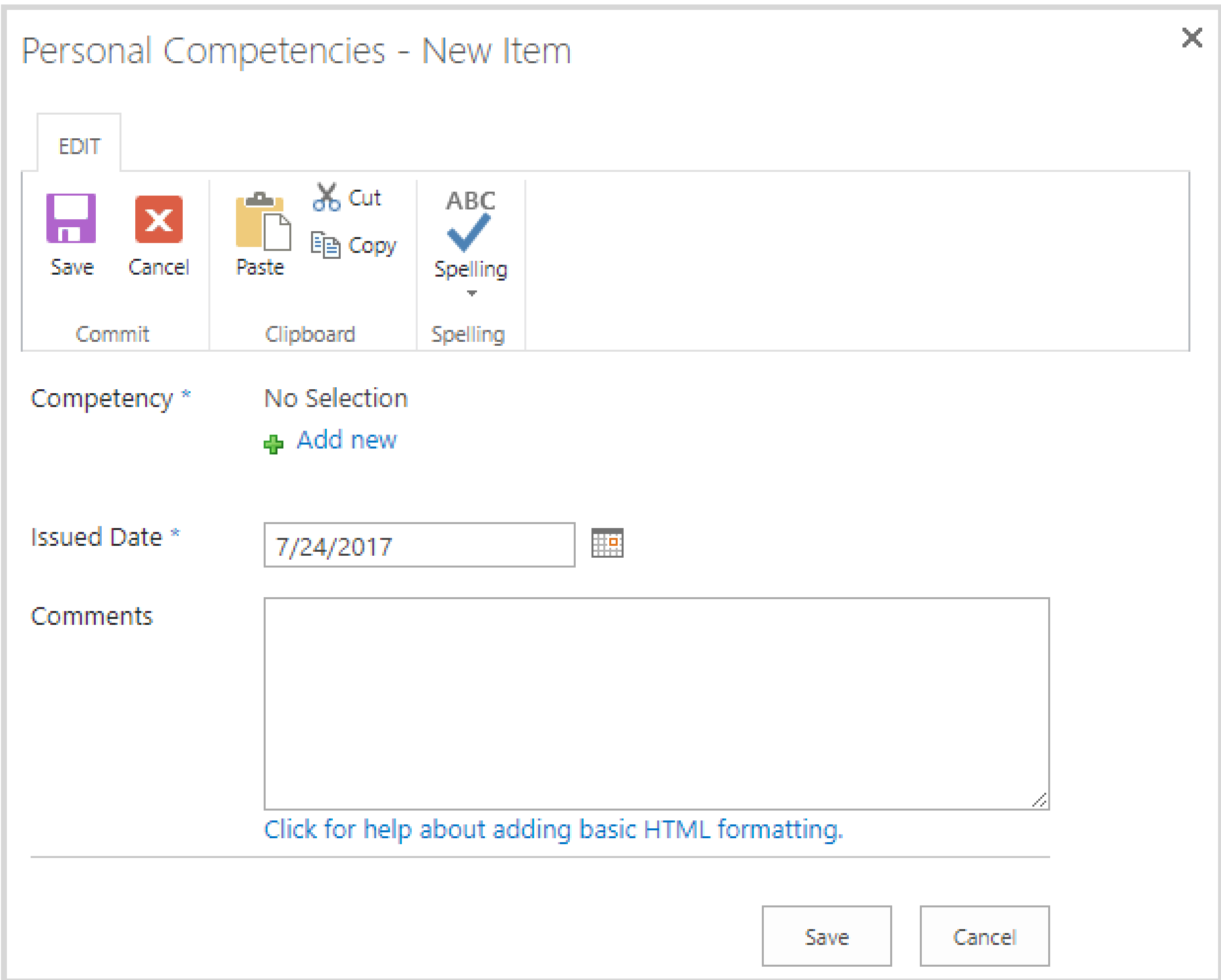
6.3.2 Grant Competency

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

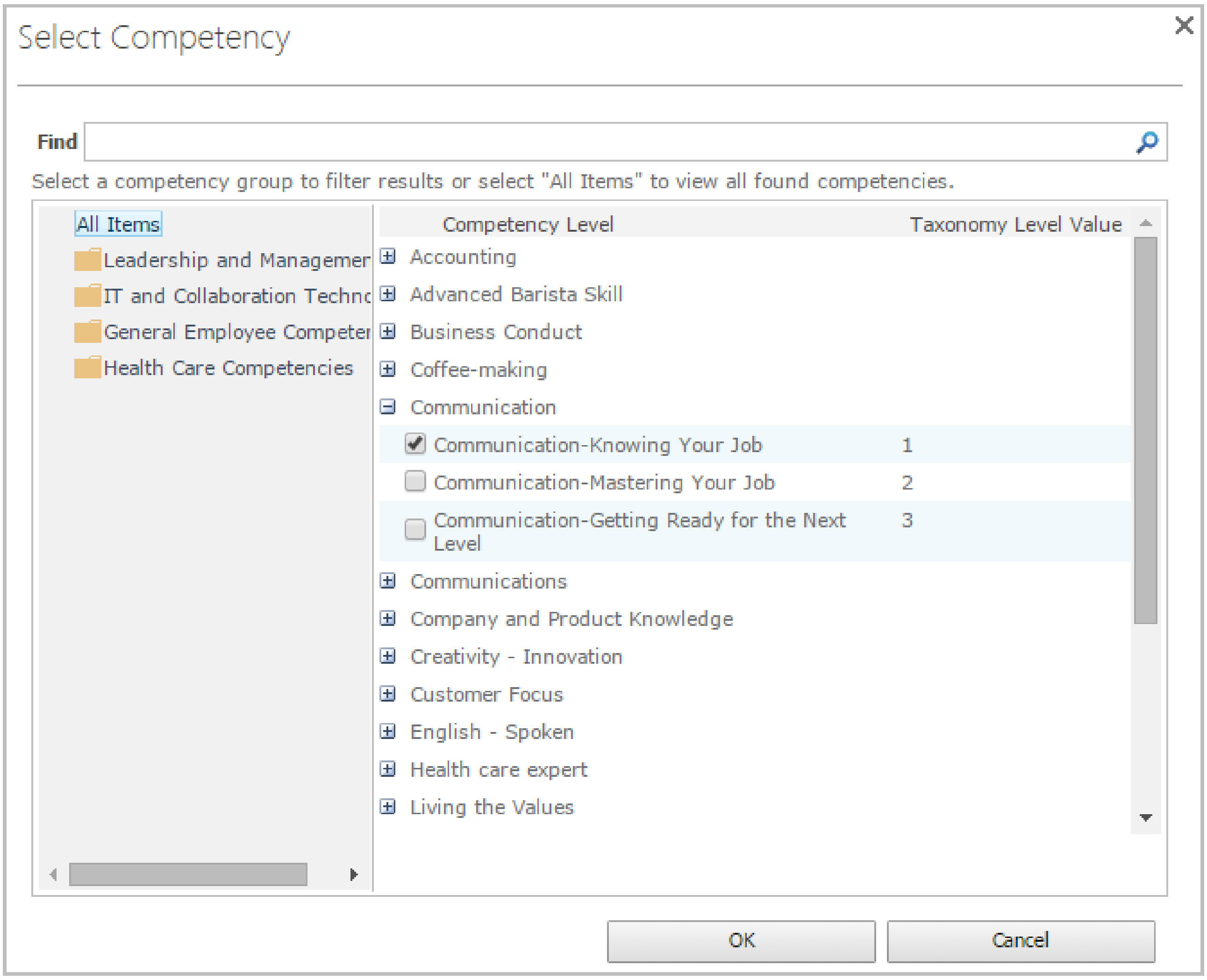
1) On the ribbon click Grant Competency button in Competencies Tools from Personal Competencies:



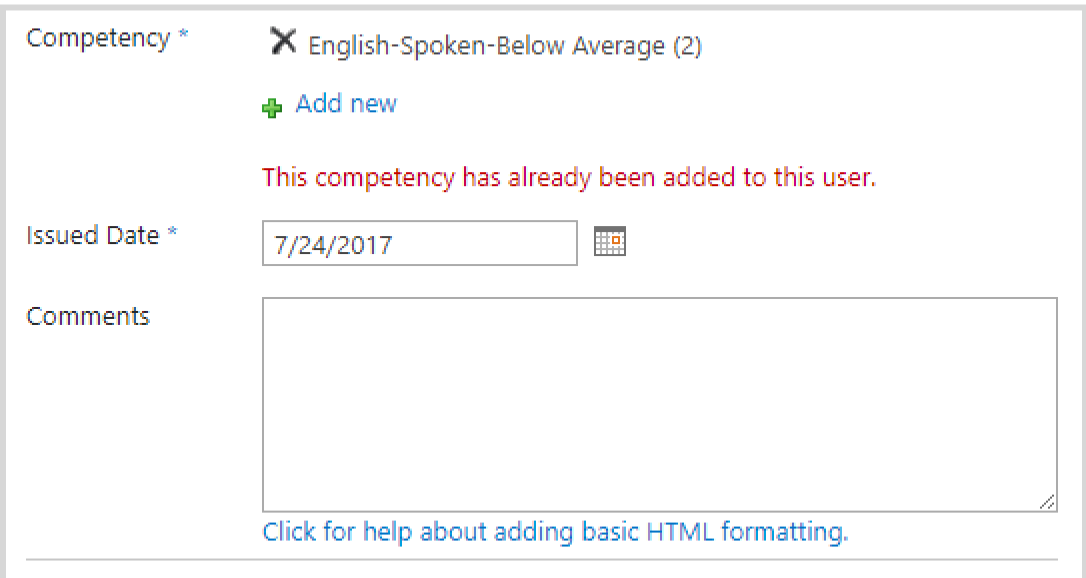
2) Fill out the Personal Competency-New Item form:



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.

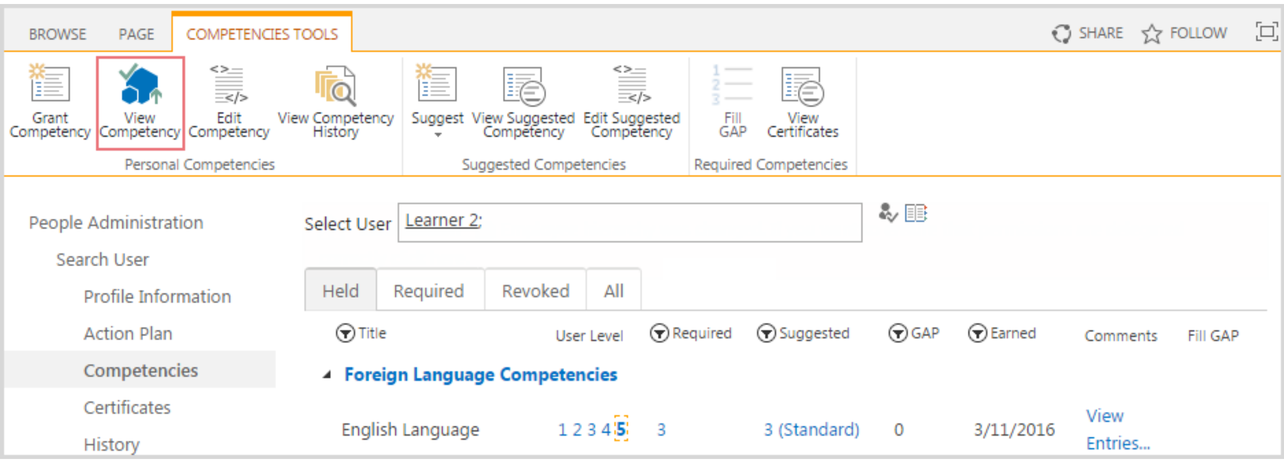
1. Specify Issued Date of the granted competency (by default, current date is set). This date will be displayed as Earned Date in Competencies page as well as in web reports;
2. Optionally add any comments to the Competency that is to be added to the employee's Personal Competencies list;
3. Click Save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

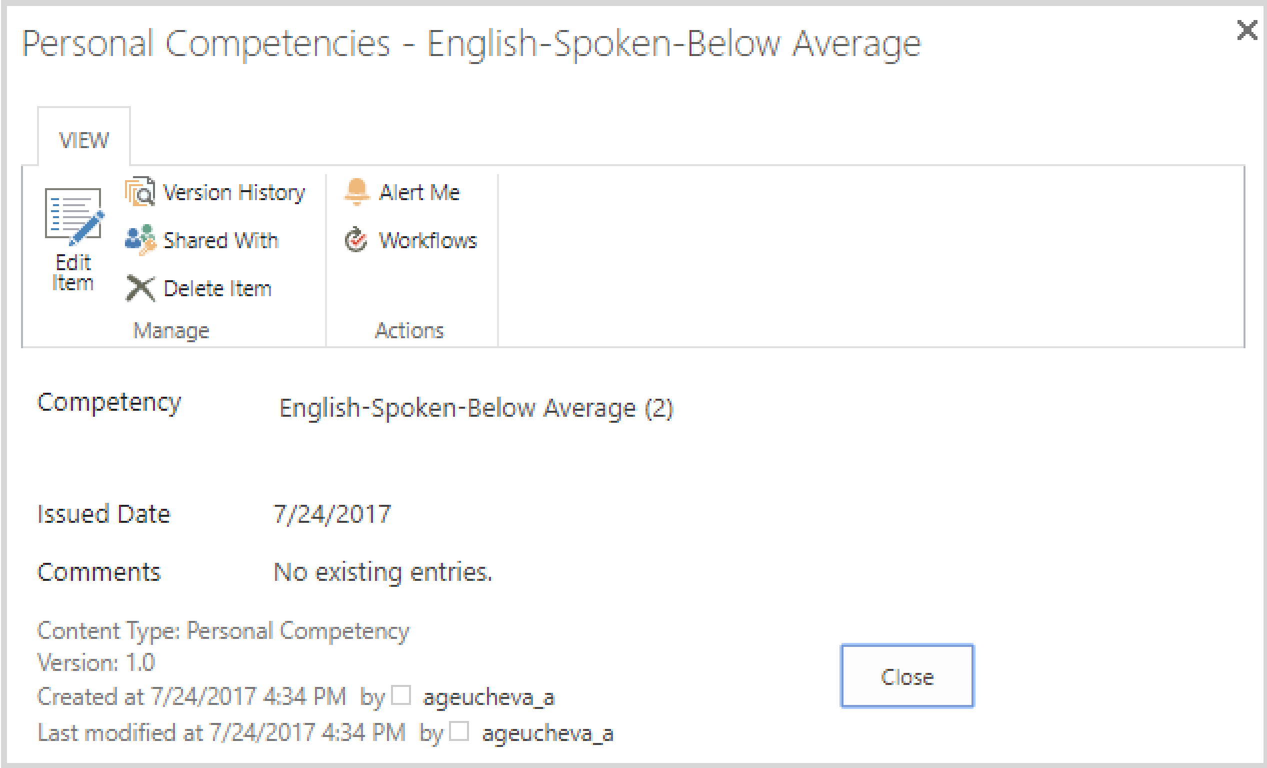
6.3.3 View Competency

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:



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):

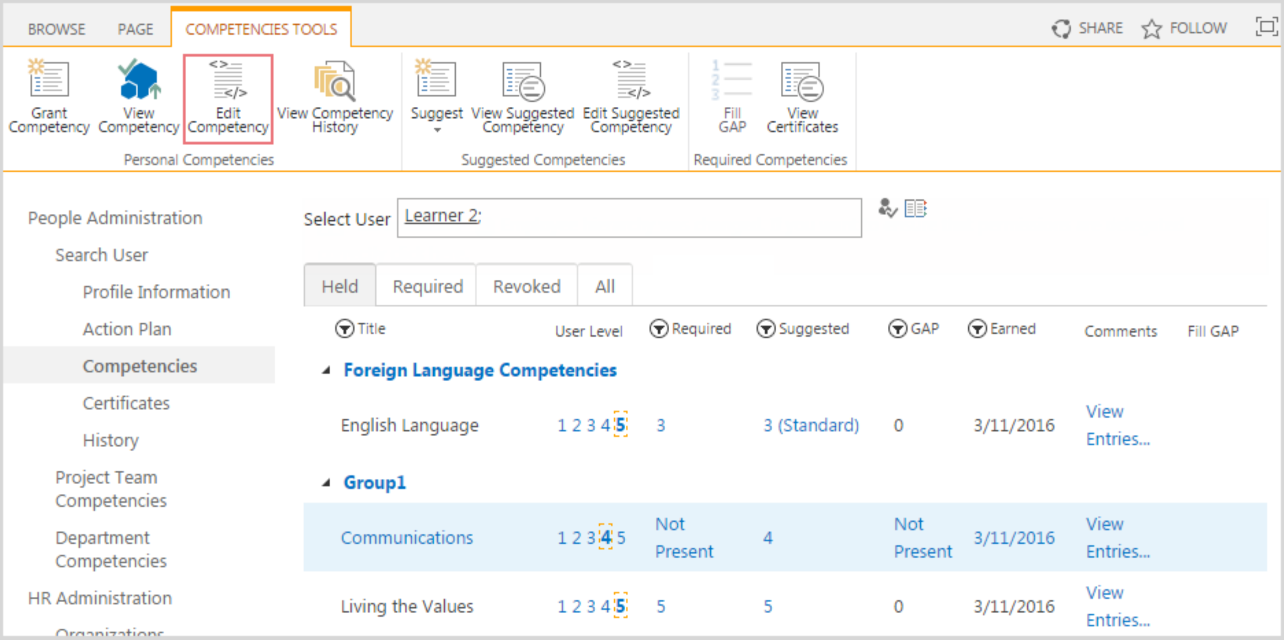


Note please that the user has an option to Edit and Delete the Competency from the Personal Competencies of an employee from the View form. Please, refer to the Edit Competency section and Delete Competency section respectively for more information on these functionalities.

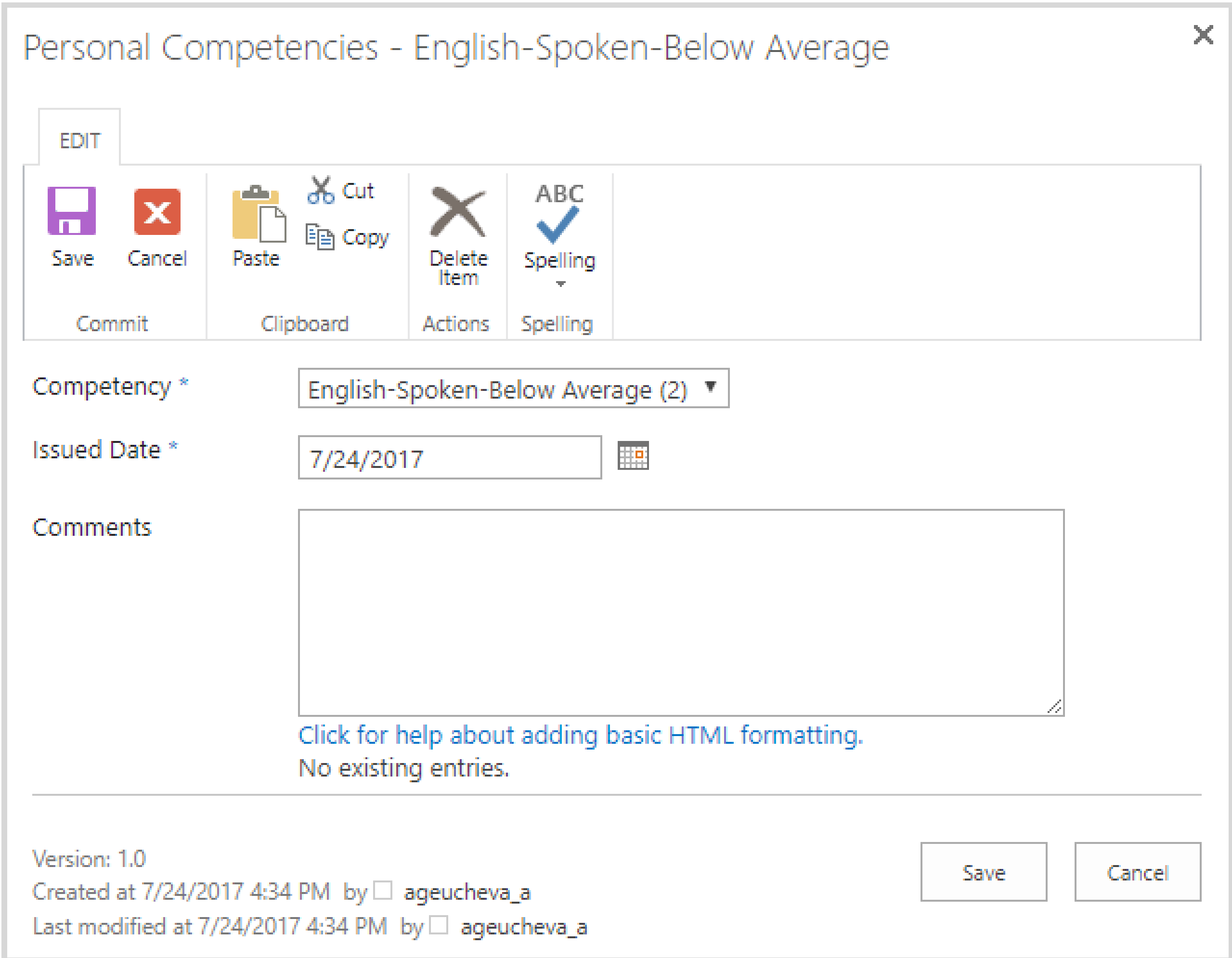
6.3.4 Edit Competency

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

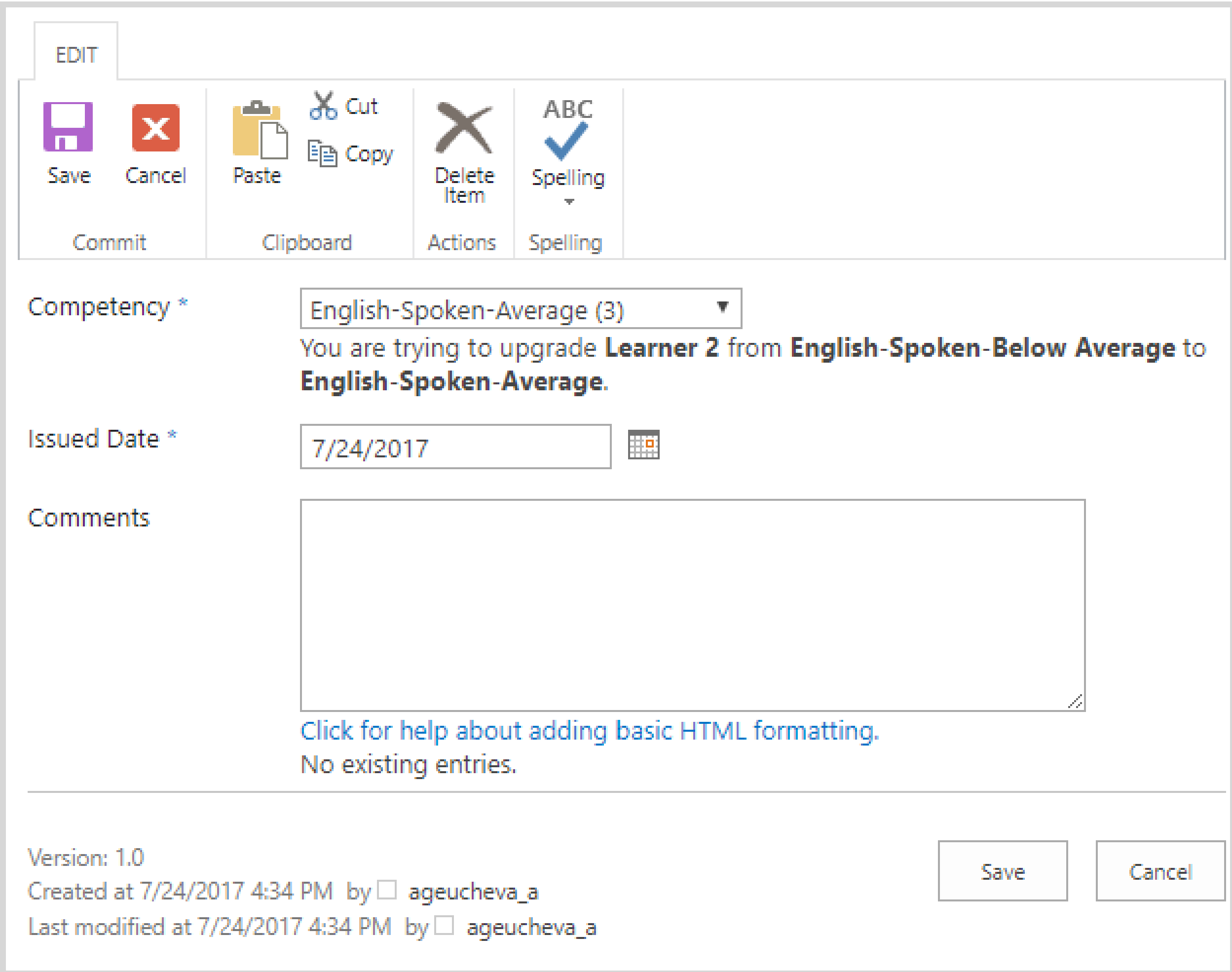
1) On the ribbon click Edit Competency button in Competencies Tools from Personal Competencies:



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



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:



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.

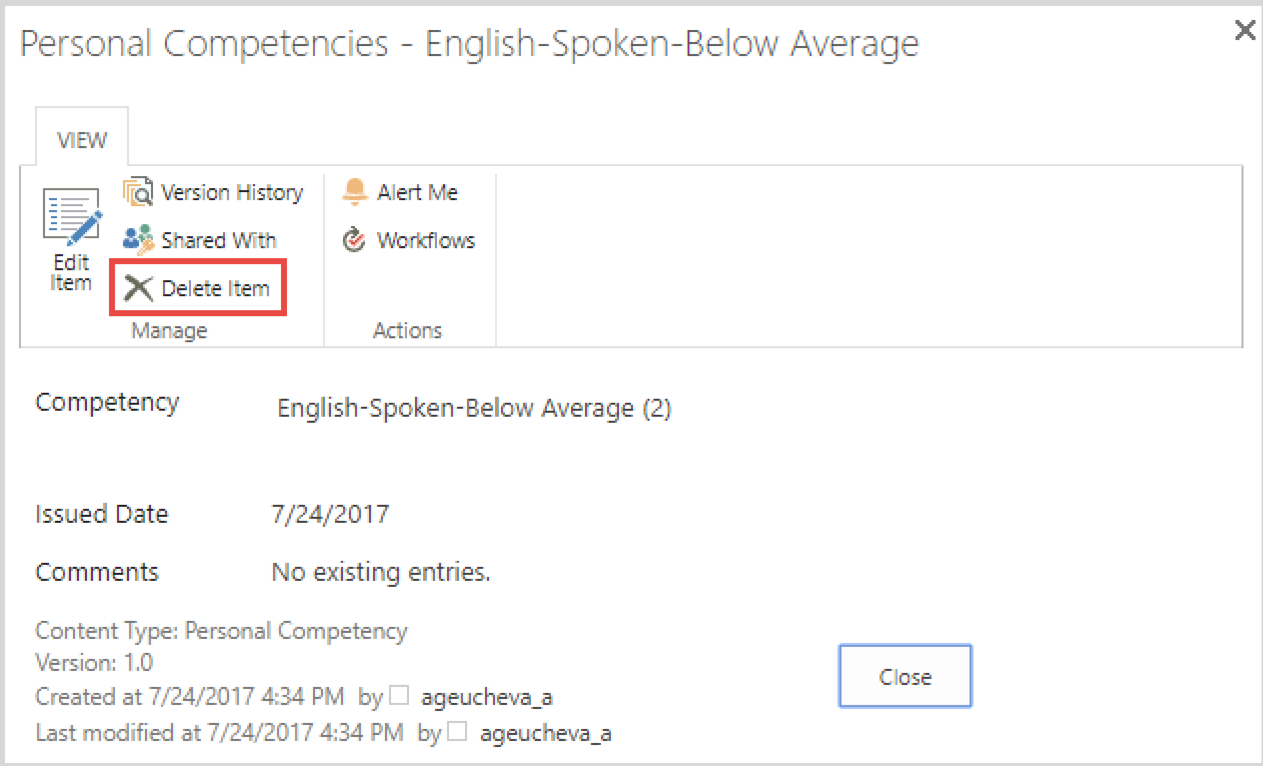
NOTE:	Changes in Personal Held Competencies of an Employee are reflected in the Project Team Profiles of which he is a project team member: the system updates the Project Team Competencies list and recalculates Project Team's Held Taxonomy Levels of the Competencies.

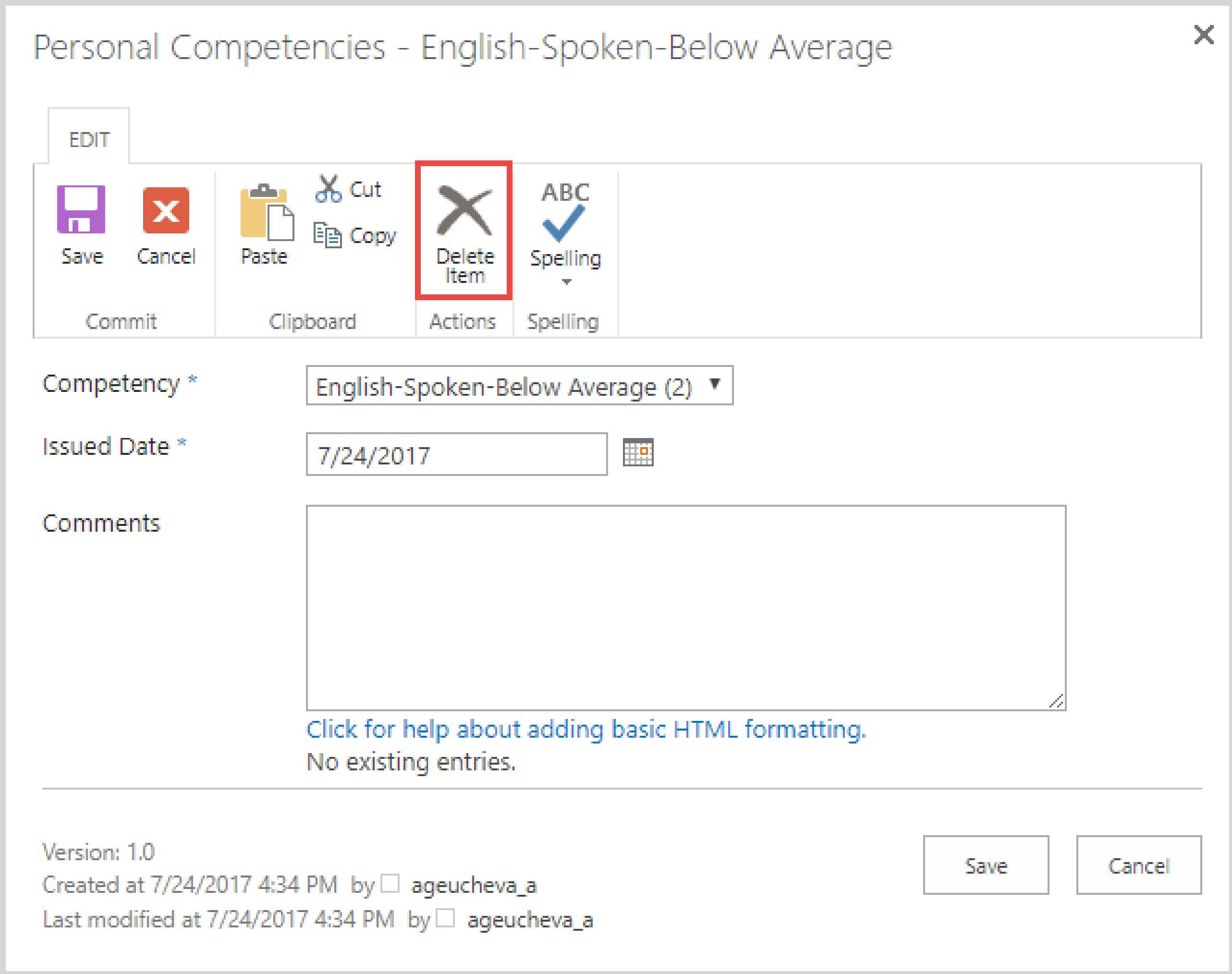
6.3.5 Delete Competency

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

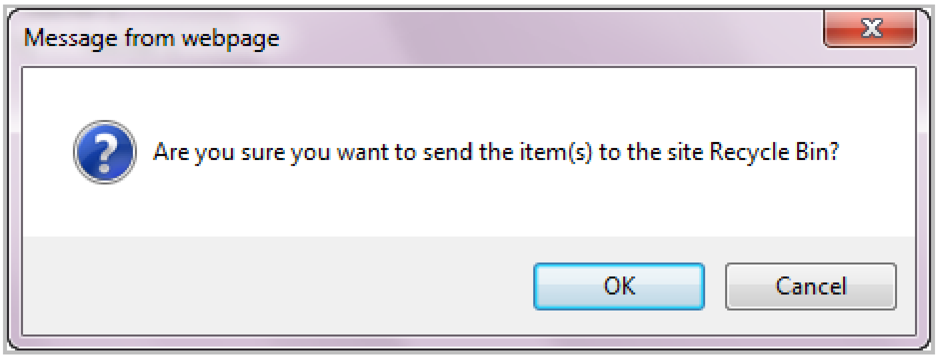
Note please that the option to delete user's competency is available only from the View and Edit forms for the suggested item.

1) Select the competency you want to delete and open it for view or edit;
2) Click Delete Item in the ribbon menu:





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

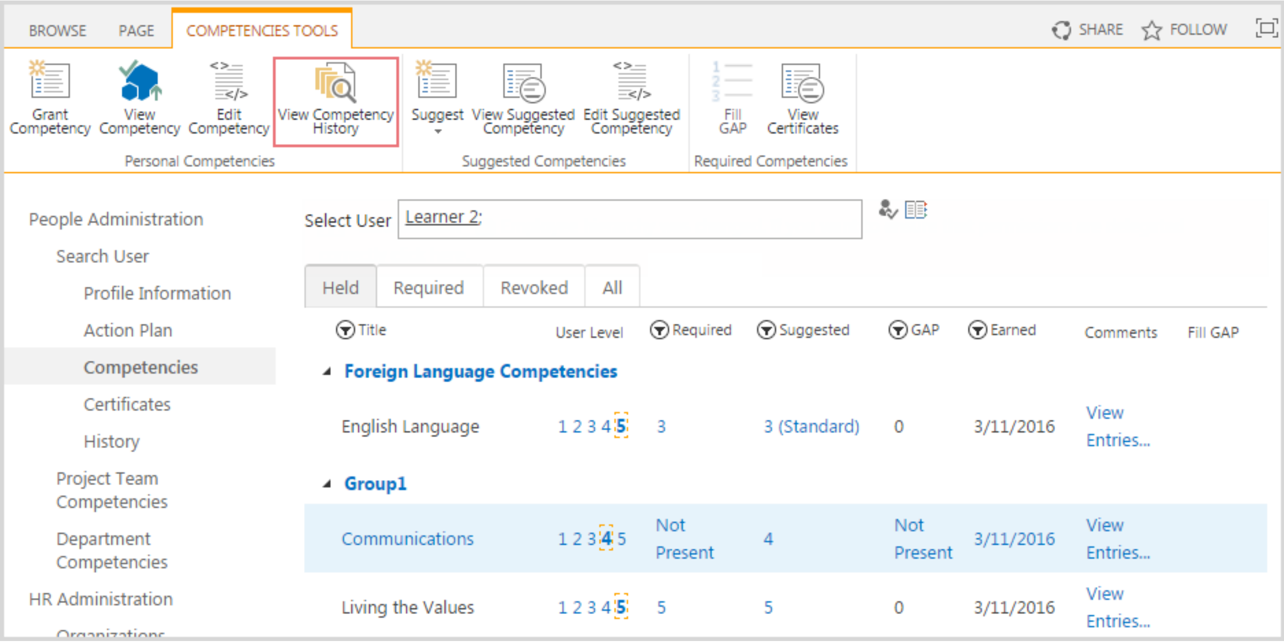


4) Confirm the decision by clicking OK button or click Cancel button to discard the process.

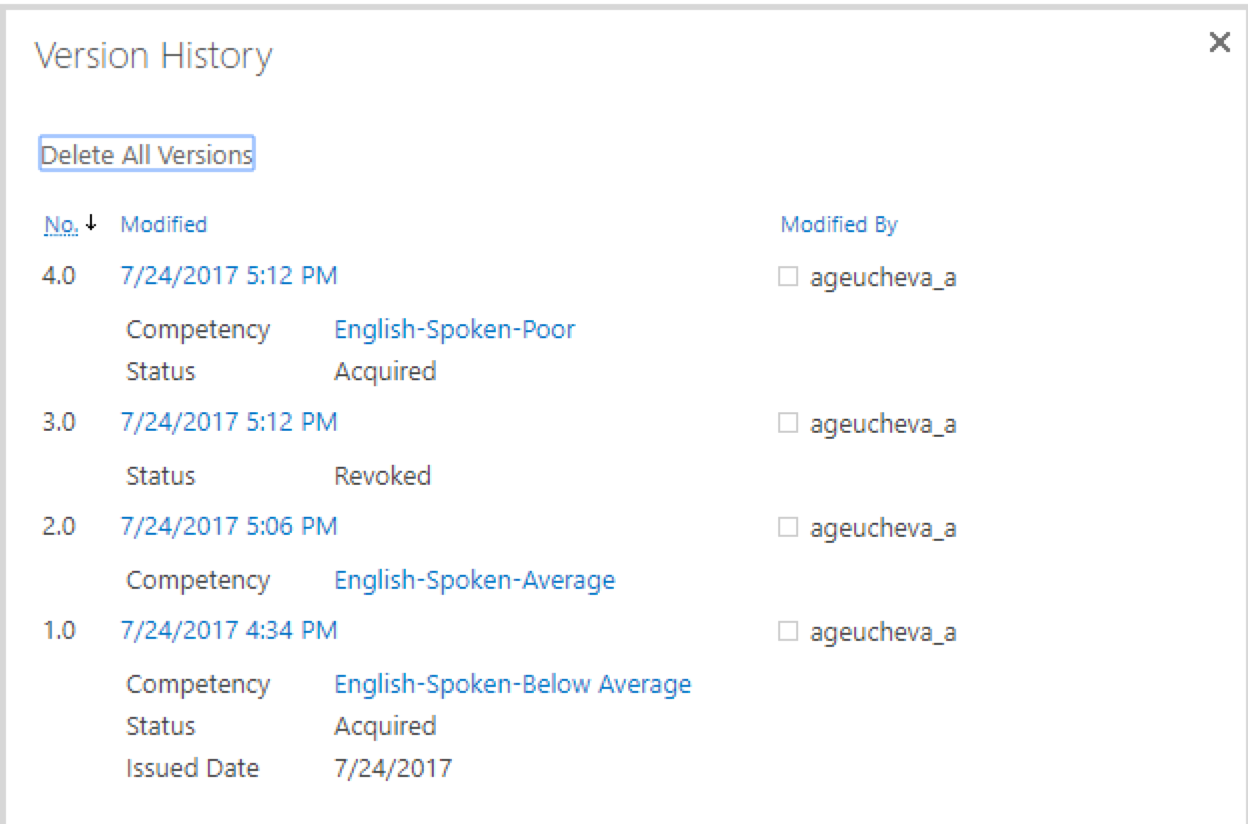
6.3.6 View Competency History

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:

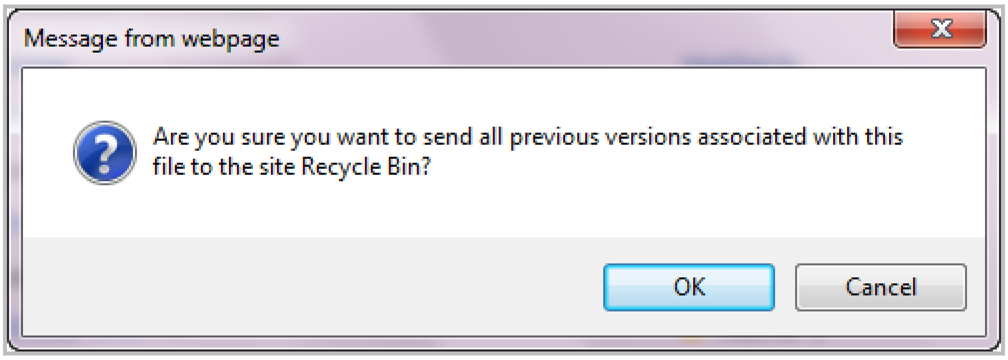


The system will display the list of all versions for the selected Competency (Name and Level) with version No., Date it was modified and by whom the change was made:



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:



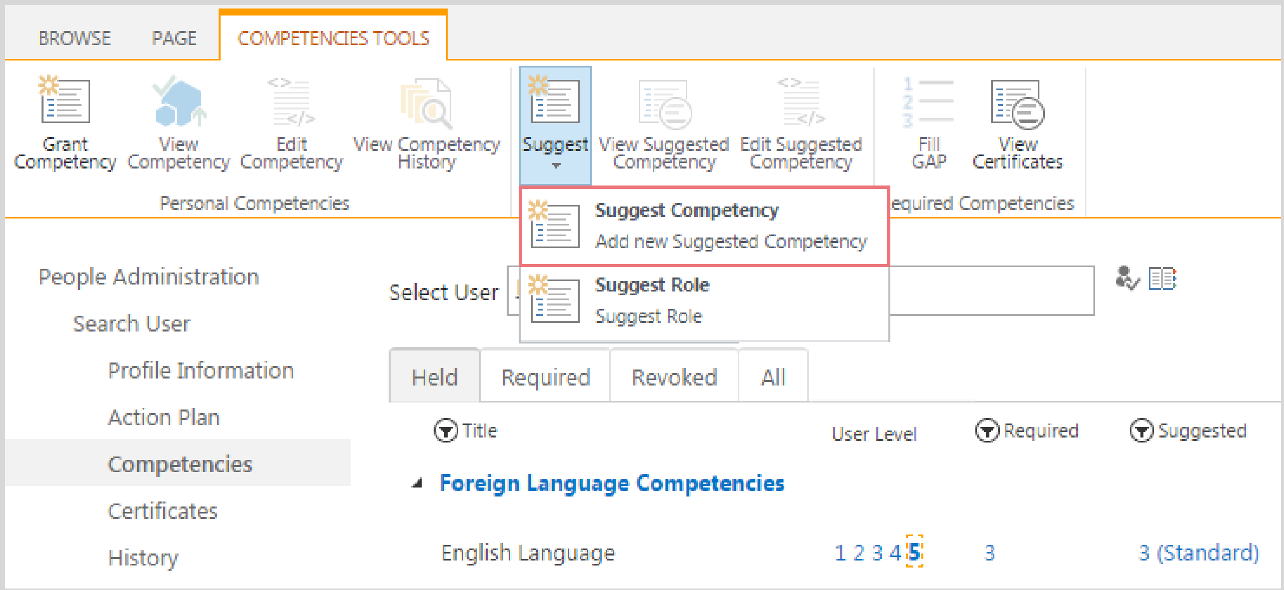
3) Confirm the decision by clicking OK button or click Cancel button to discard the process. All the versions will be deleted except the very last:

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:

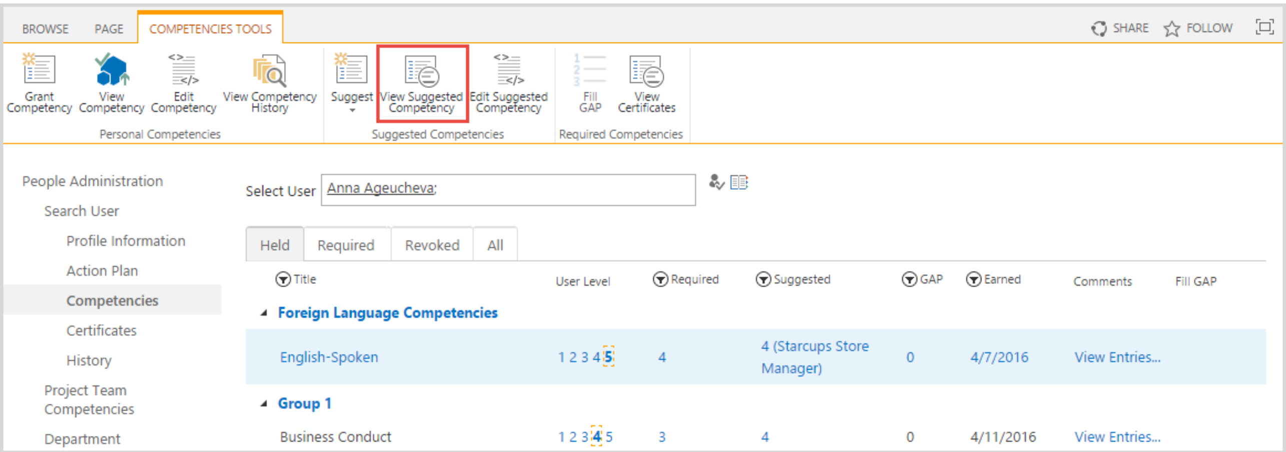


2) Fill out the Action Plan - New item form. The Suggested Competency is automatically added to the Action Plan and will be displayed in the Competency list. Refer to the Add New item to Action Plan section for details on how to fill out the form.

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:

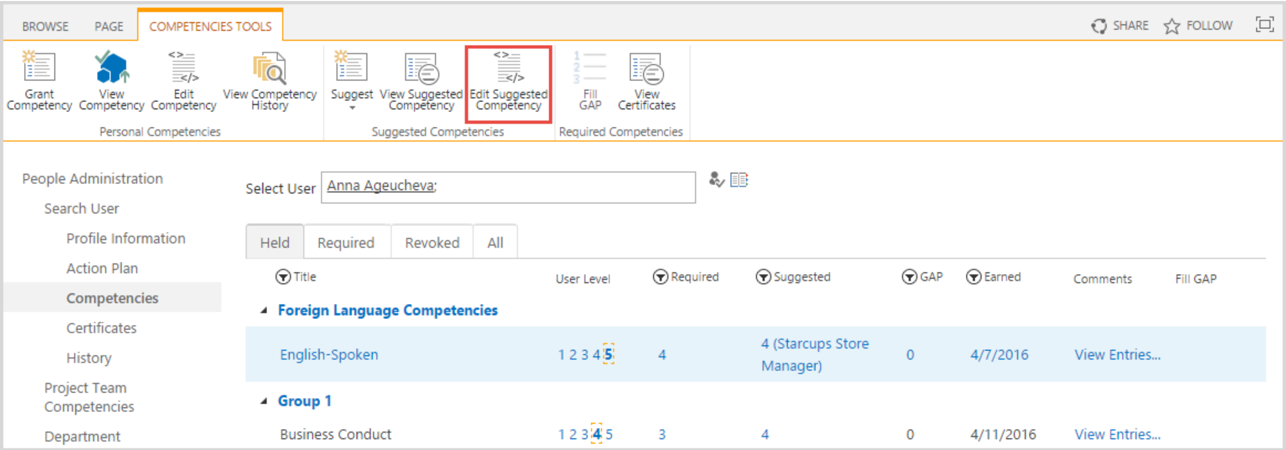


The system will display the View form for the selected Competency. Please refer to the section View Suggested Item's details for more information.

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:

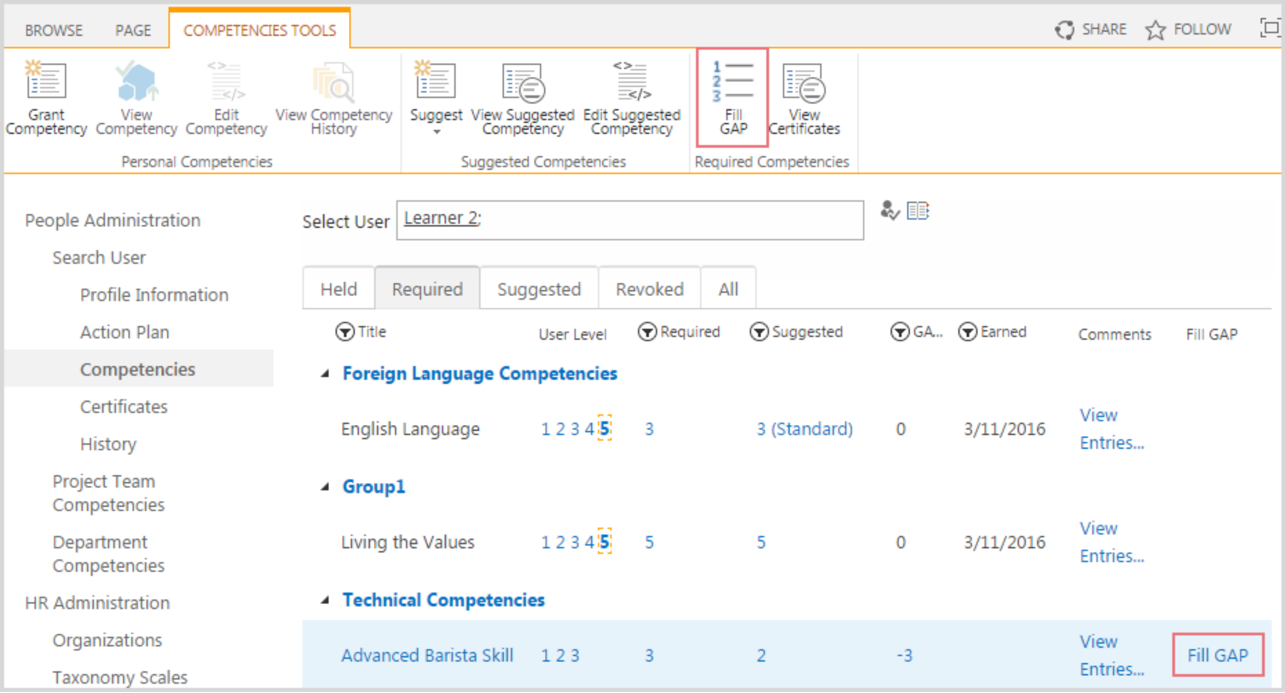


The system will display the Edit form for the selected Competency. Please refer to the section Edit Suggested Item in Action Plan for more information.

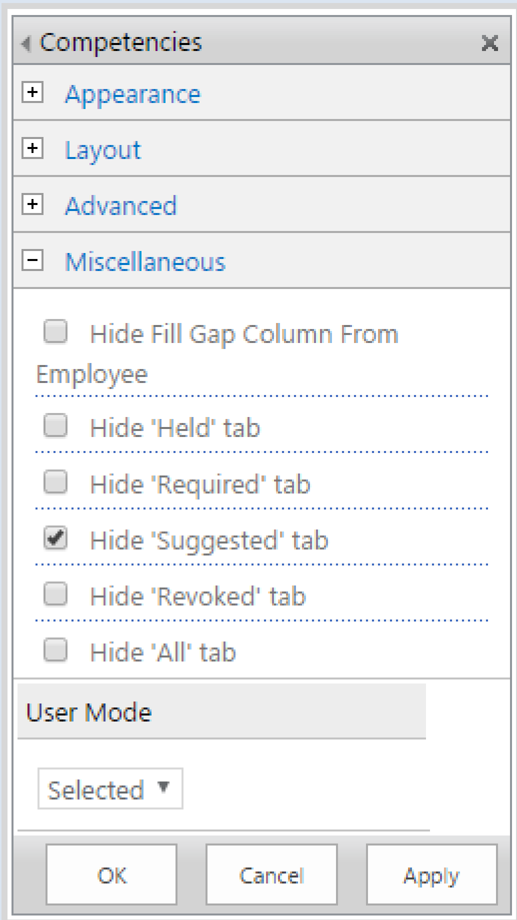
6.3.10 Fill Gap

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:

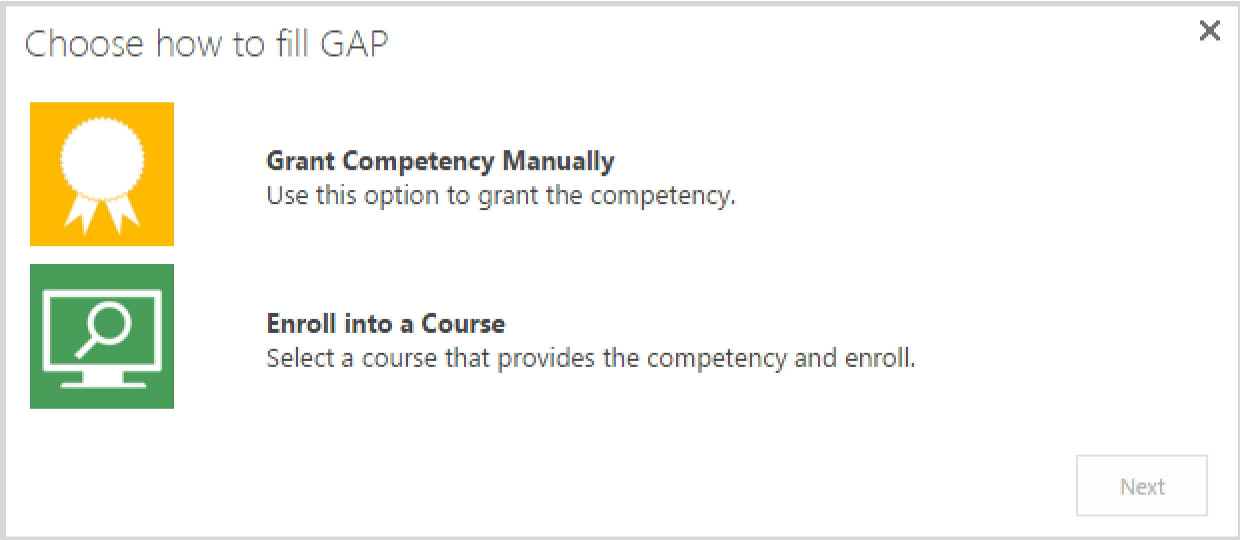
1) Select the Competency for which the GAP is negative and needs to be filled
2) Click link Fill GAP in the right column or on the ribbon click Fill GAP icon in Competencies Tools:



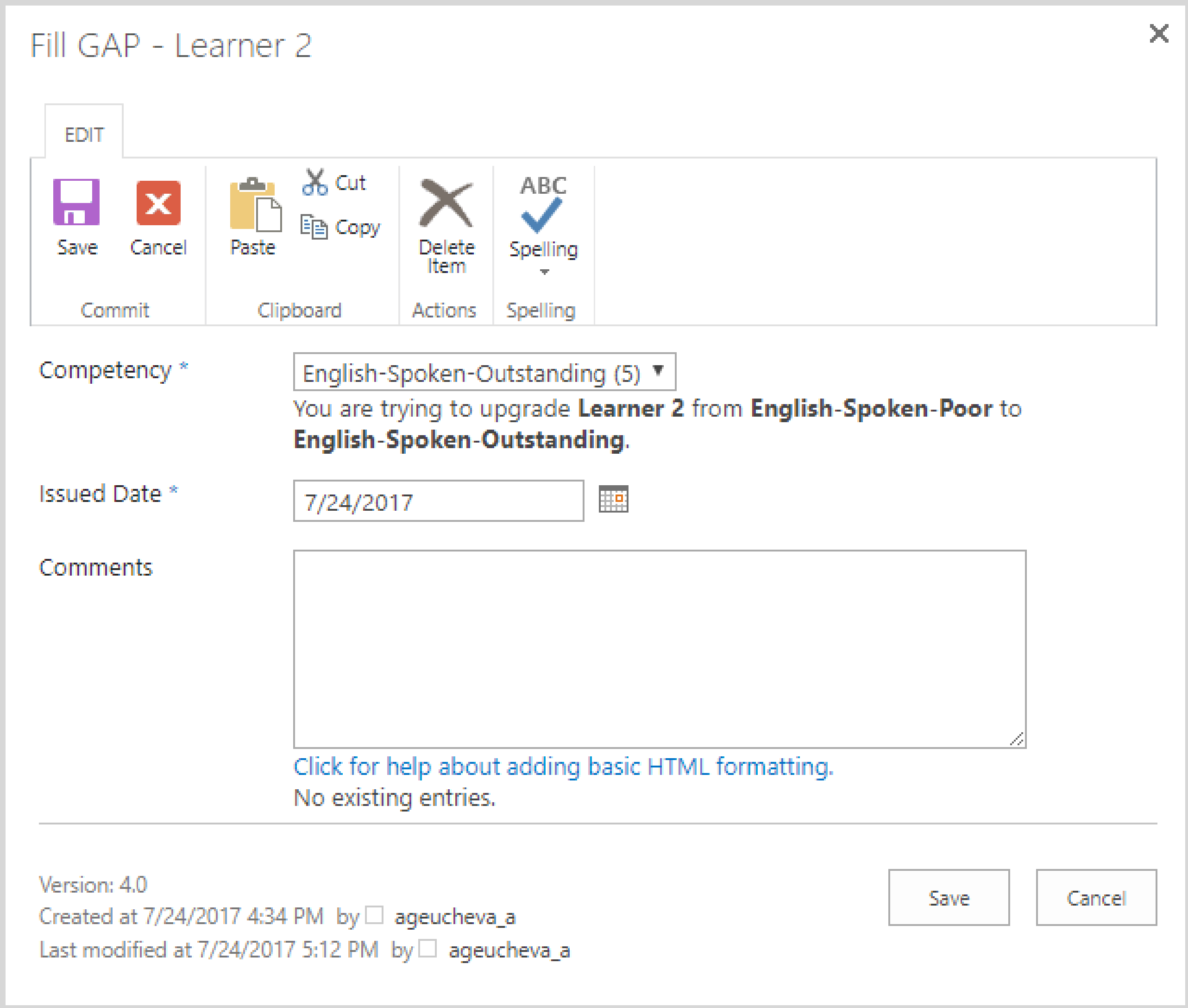
NOTE: It is possible to hide this link from users. To do it, open the Competencies web part settings and enable option 'Hide Fill Gap Column From Employee' in Miscellaneous section. The link will still be displayed for managers:



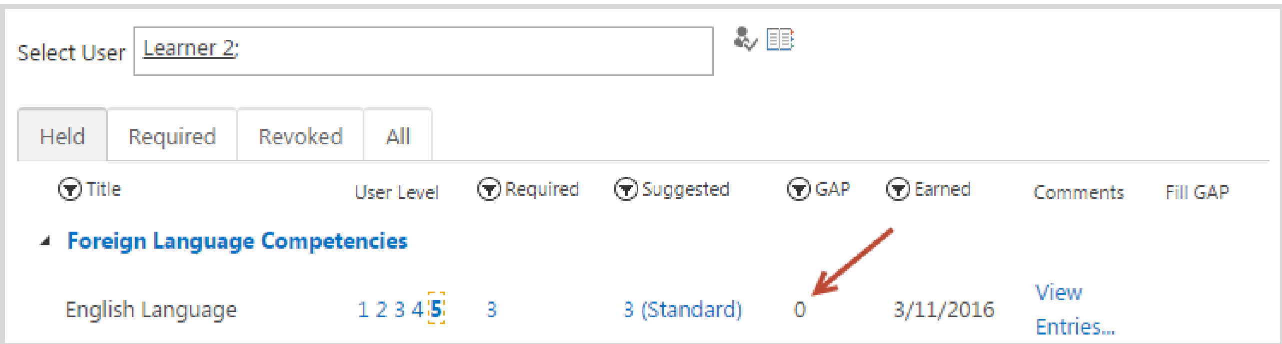
3) The system will suggest to grant the competency manually (for managers only) or enroll employee into corresponding REM course (for managers and employees). Select option and click Next:



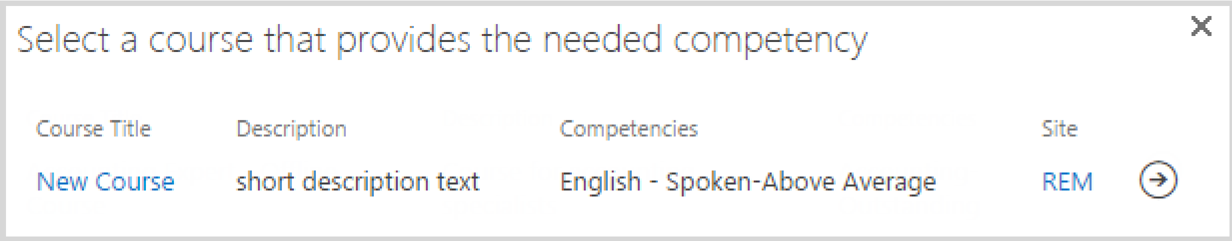
If you select to Grant Competency Manually, a warning is displayed to the User notifying that he is upgrading the Competency's Level to close the GAP. The Competency with the required level is already selected in the Competency field:



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:

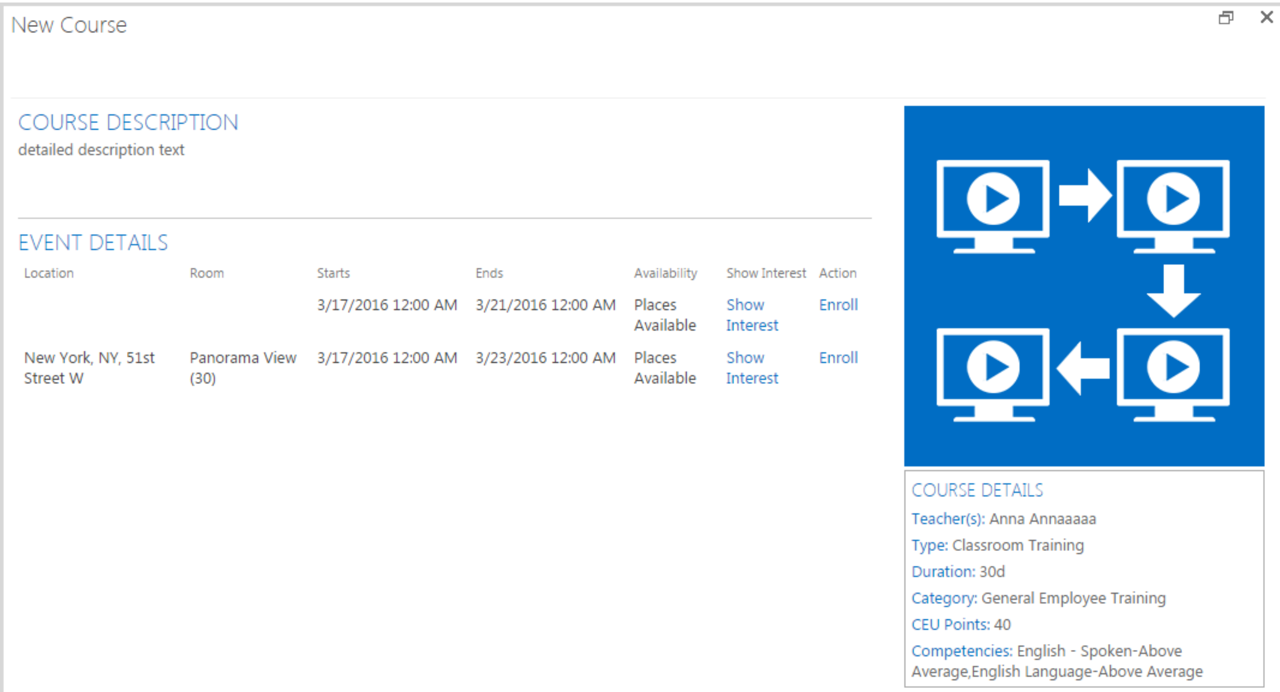


If you select to Enroll into a Course, the system will show a list of courses that provide the needed Competency level (e.g. if user needs to have competency level 4 and has competency level 2, he will see all courses that provide competency level from 3 to 5):

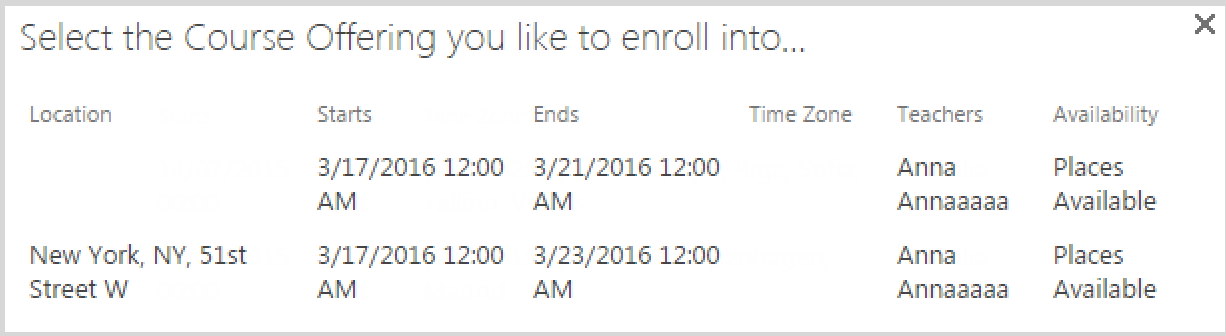


NOTE:	If course that provides the needed competency level is locked by Curriculum prerequisites or by Course prerequisites inside the curriculum to which learner is assigned, you will see locked icon next to it and its title will not be clickable.

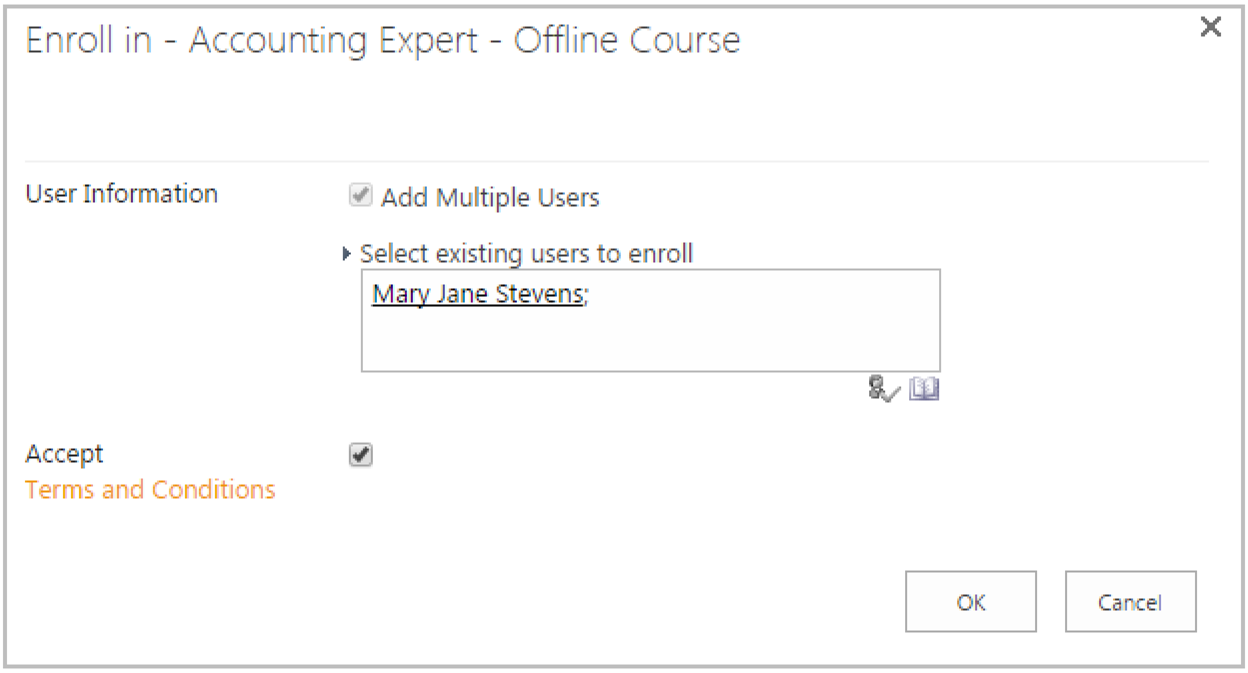
Click the Course Title link to view Course Details page in modal window where you can view more information about the course:



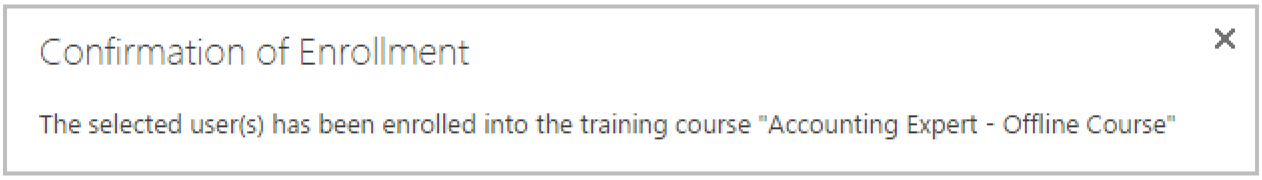
After you close the modal window, you can proceed with enrollment. Select the needed course and select Course Offering for enrollment (if several are available):



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



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:

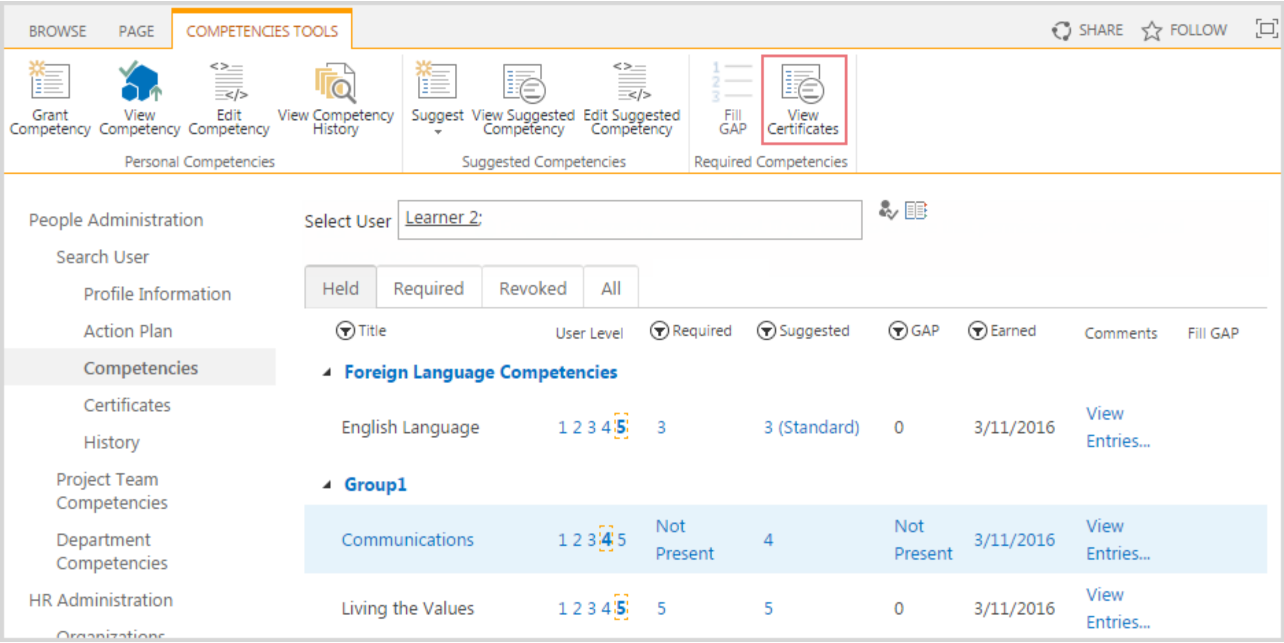


NOTE:	Manager can enroll himself and his subordinates only.

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

6.3.11 View Certificates

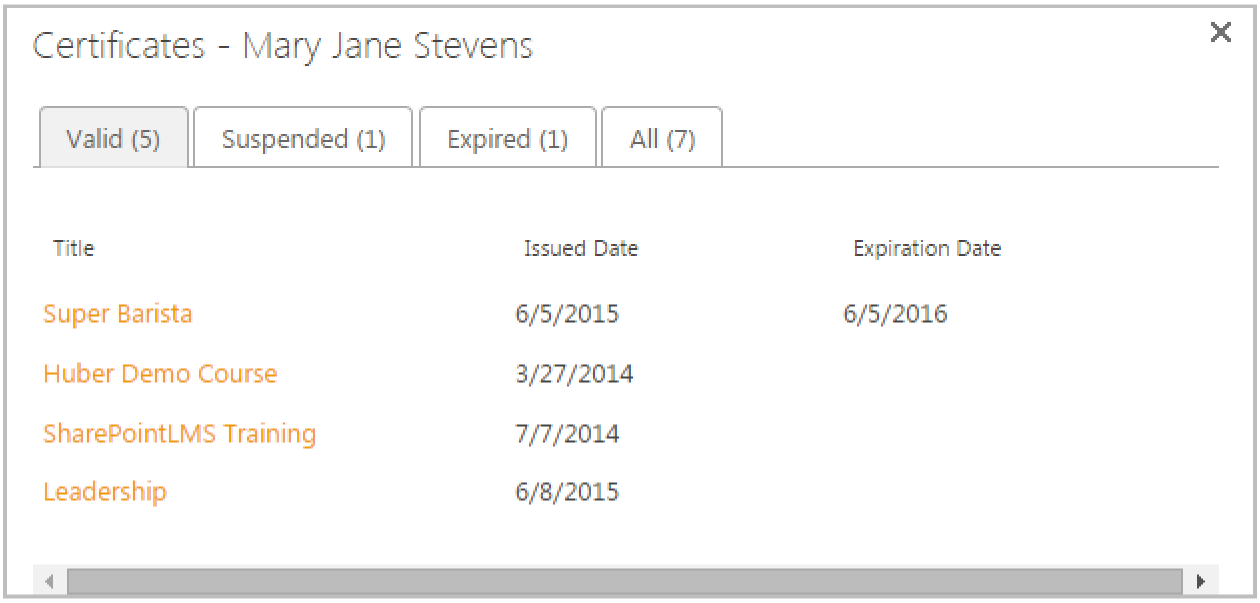
The User can see the list of the Certificates that an employee holds by clicking on View Certificates on the ribbon in Competencies Tools:



The 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:



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.

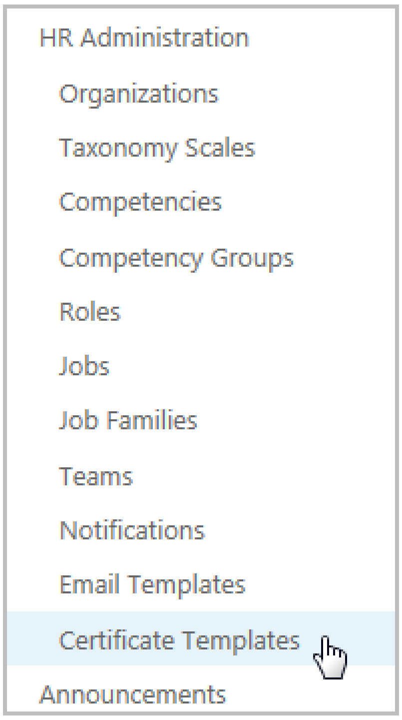
Certifications Acquisition and Certifications Expiration processes are described below in Personal Certifications Management section.

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.

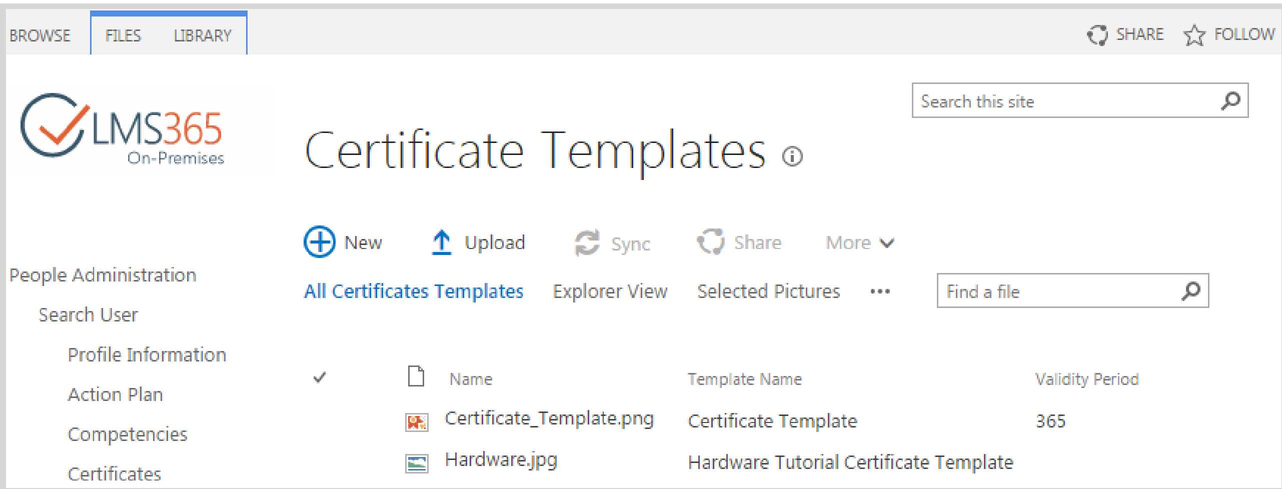
6.4.1 Certificate Template Management

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:



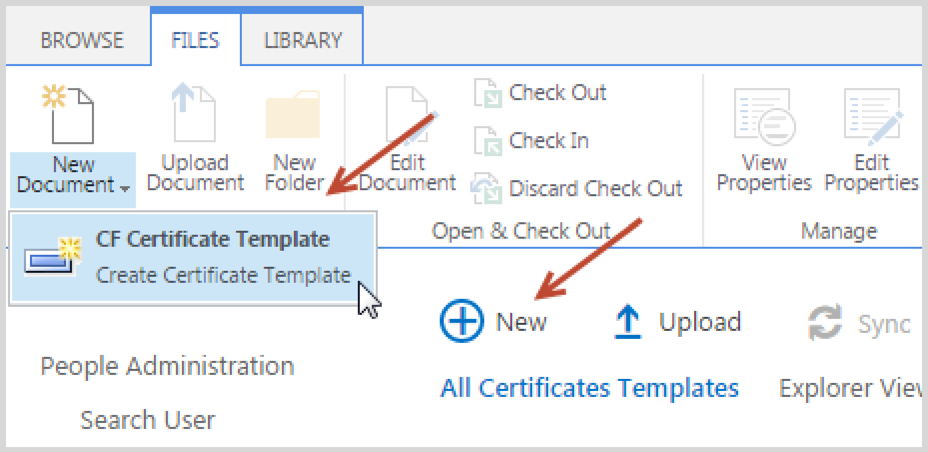
The user is redirected to the CF Certificate Templates page with all Certificate Templates displayed by Name and Validity Period:



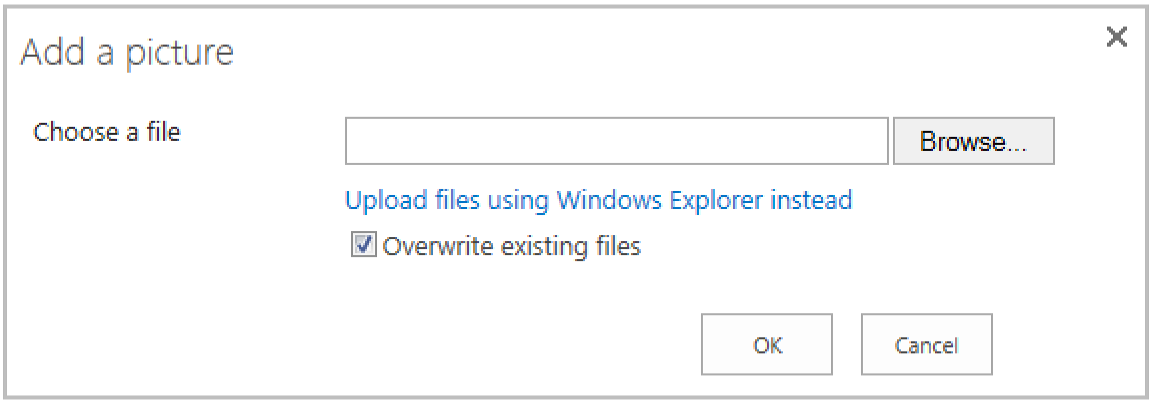
6.4.1.1 Add Certificate Template

To create new Certificate Template, follow these steps:

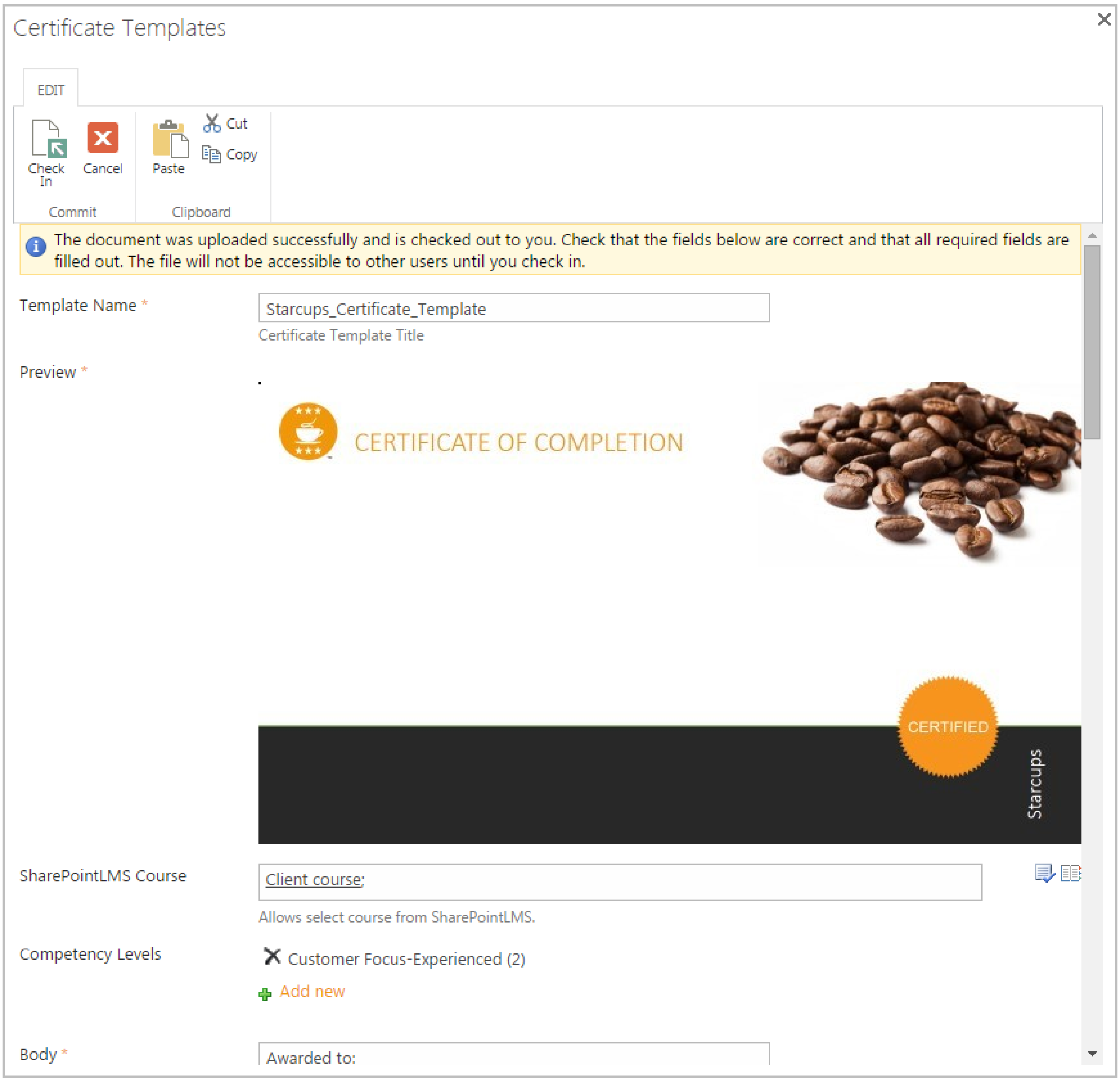
1) Click New Document button > CF Certificate Template or click New button to open the upload form for the Certificate Template image:



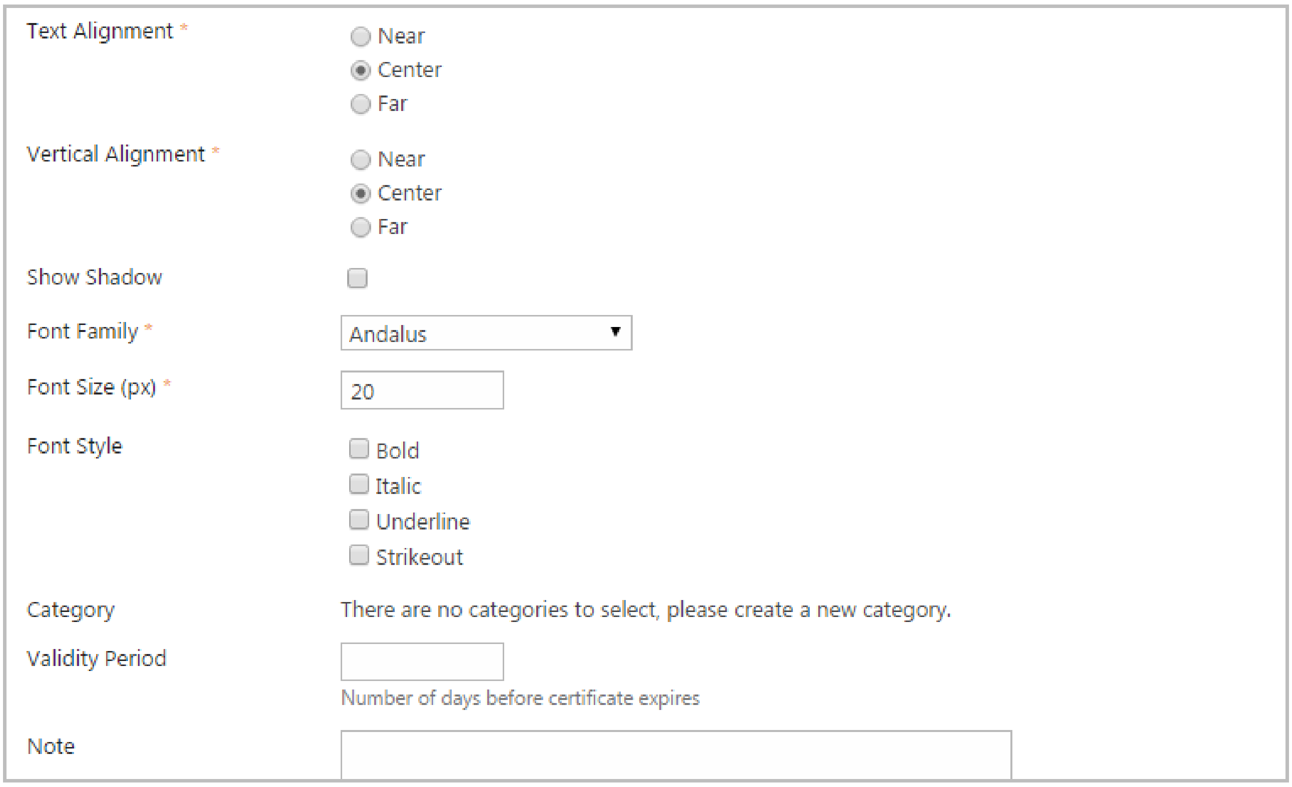
2) Browse for the image for the new Certificate Template by clicking Browse button:



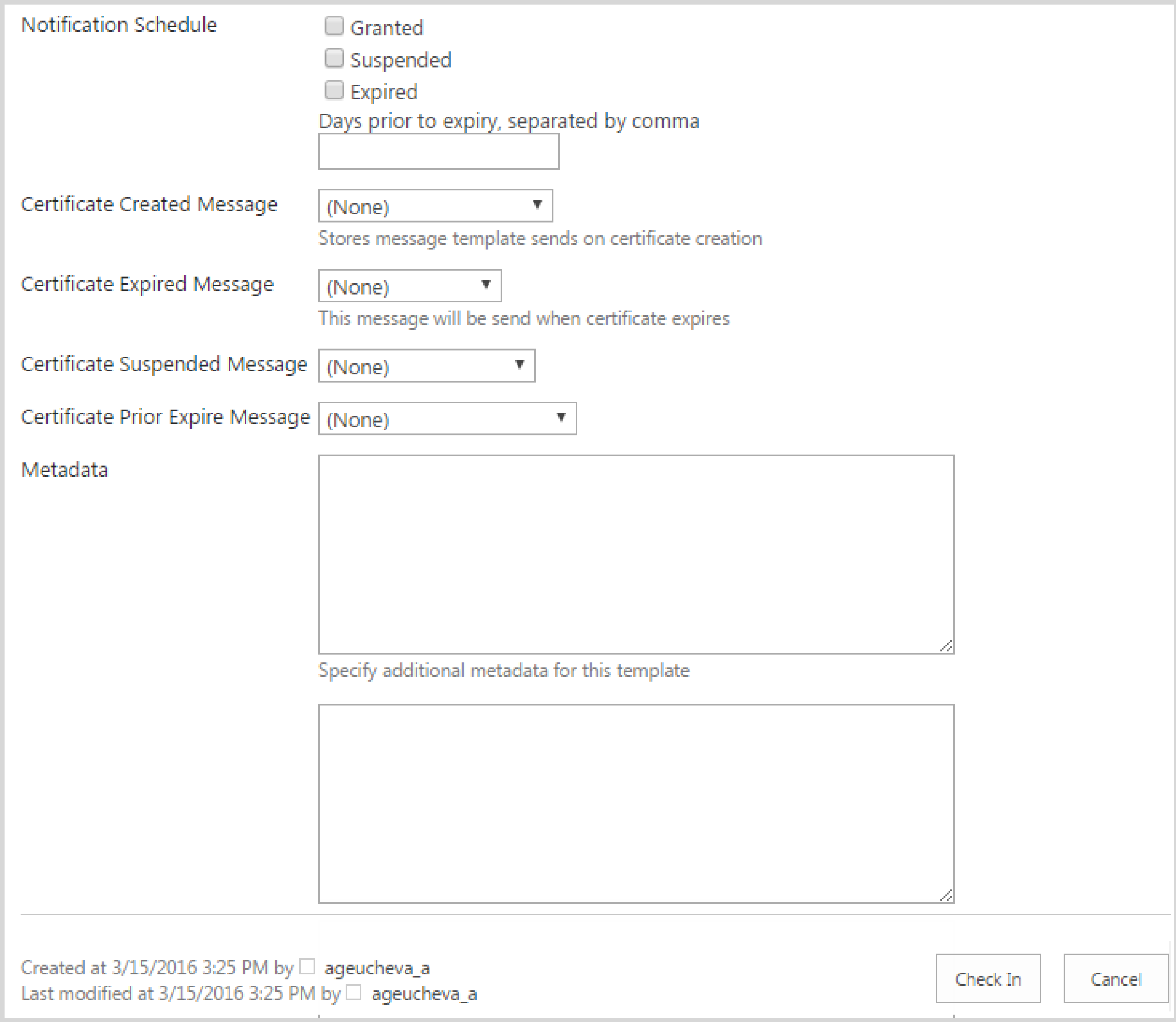
3) Click OK button to upload the image and open the CF Certificate Template Edit form:



a. Template Name – type the template's name.
b. Preview section will appear showing the smaller copy of previously chosen image. Select area for certificate text display on the image.
c. SharePoint LMS Course – specify the course for this certificate template.
d. Competency levels – specify one or more Competency levels for this certificate template. Press Add new button to choose one.
e. Body – write a short description.



- 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 – 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.

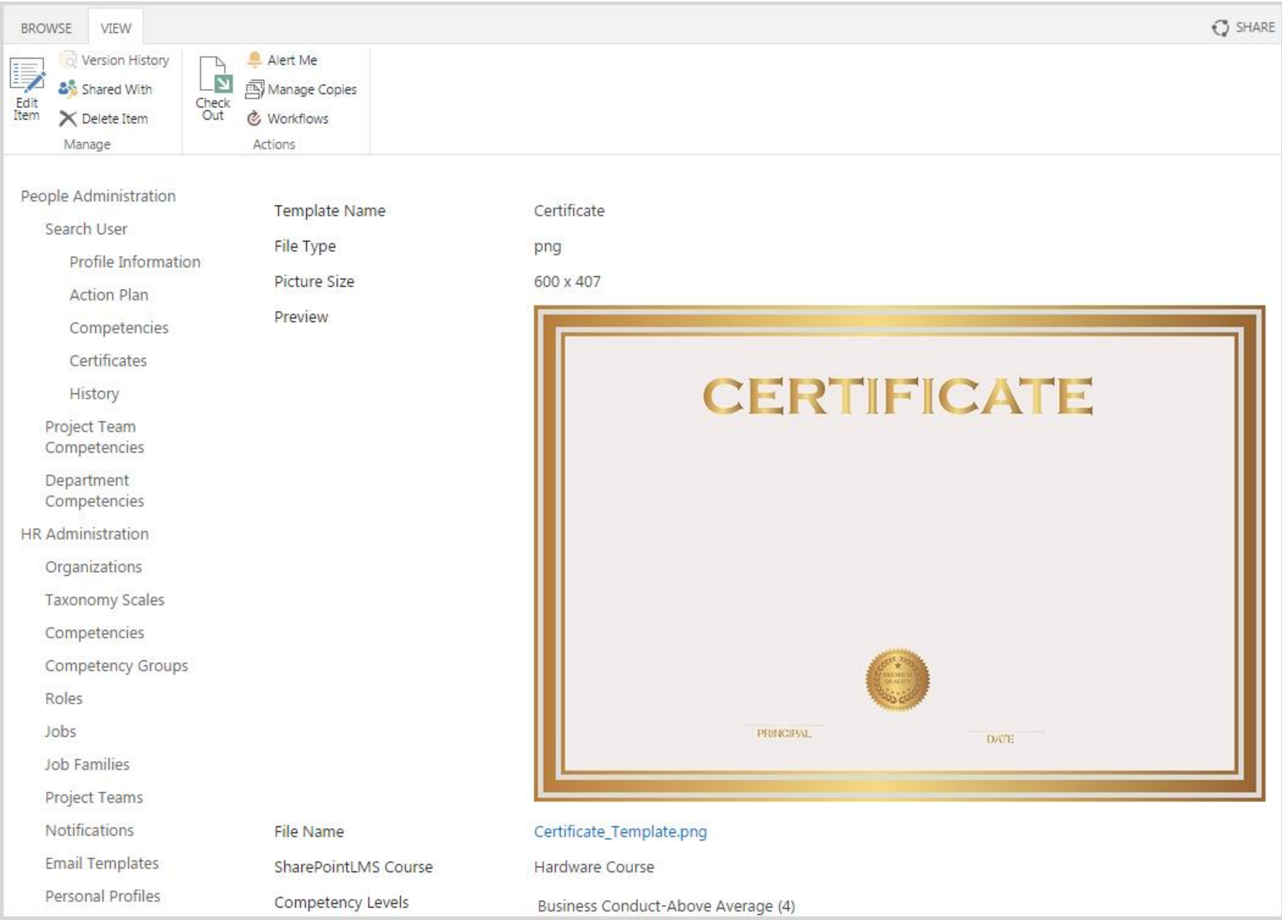
4) Click Save button to create new Certificate Template or click Cancel button to discard the changes.

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:



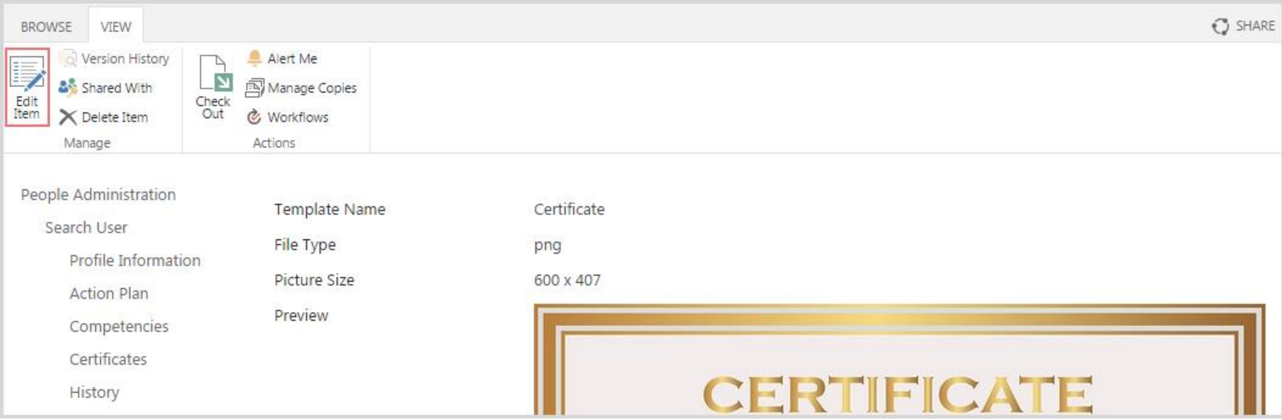
   a. Click File Name link to open the image of the Certificate Template in the new window.
   b. Click on Certificate Message (Granted, Suspended, Prior Expire or Expired) to open the View form for the selected Certificate Message Type (see Chapter 4.10.2 View Email Template's metadata for more information).

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:



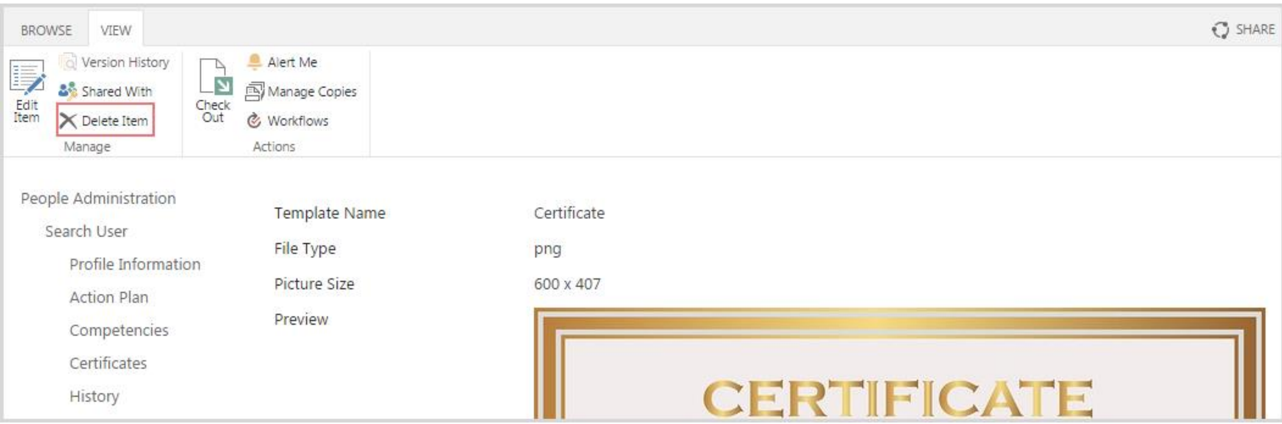
3) Make the necessary updates to the fields in the Edit form (see Chapter 6.4.1.1 Add Certificate Template to see the Edit form).
4) Click Save button to save the changes <u>OR</u> click Cancel button to discard the changes.

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.

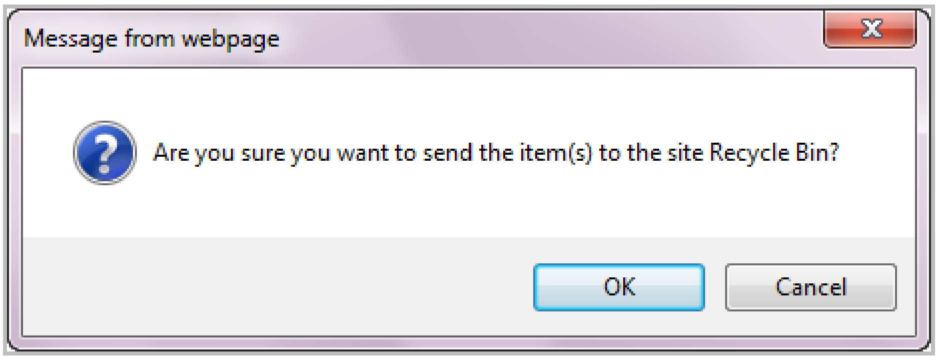
6.4.1.4 Delete Certificate Template

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:



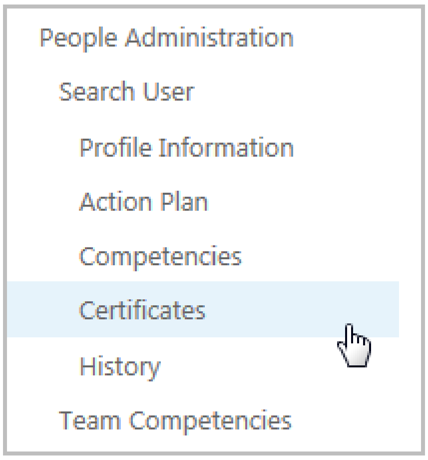
3) Click OK button to confirm the decision or click Cancel button to discard the process.

NOTE:	• 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.

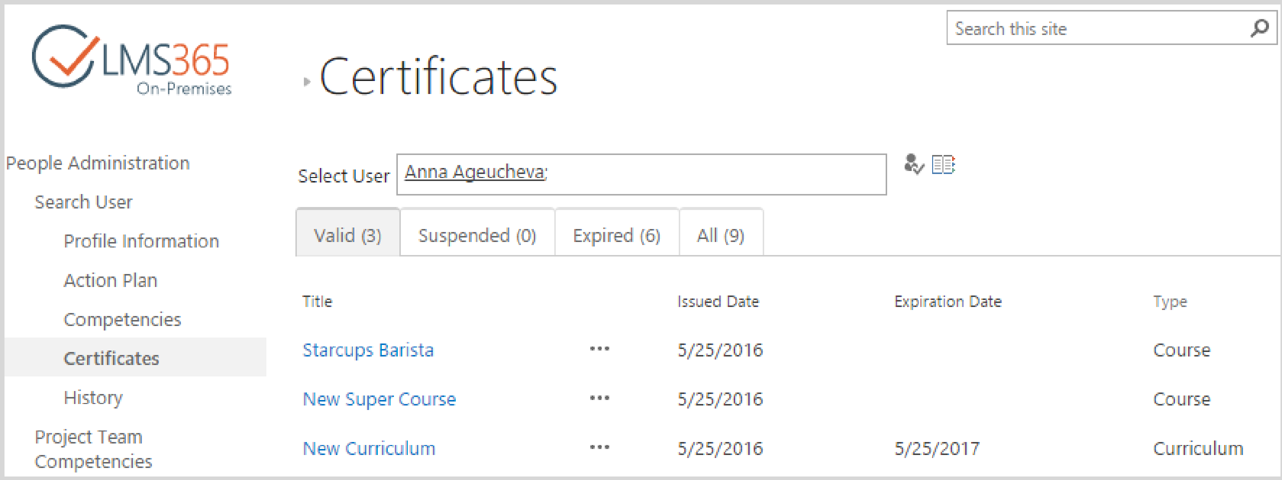
6.4.2 Certificates Management

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:

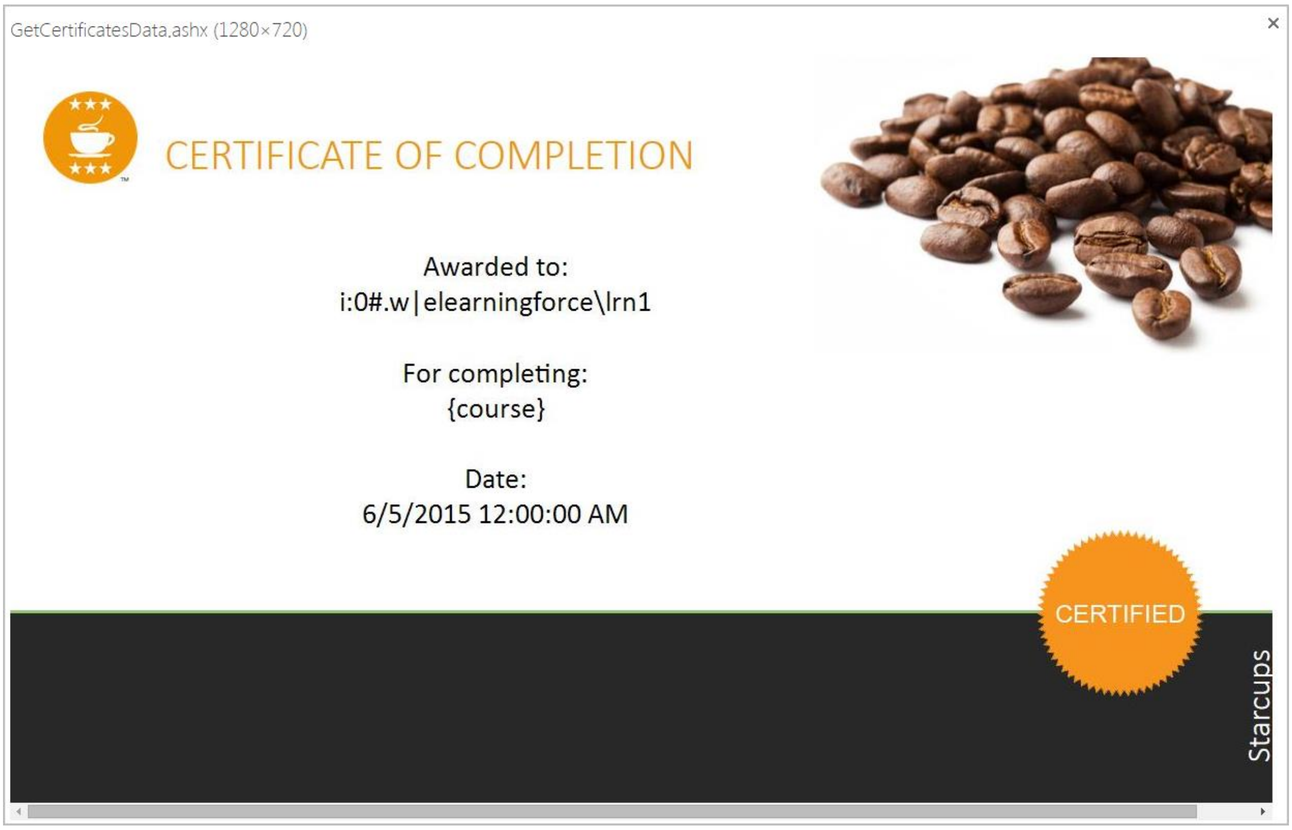
1) Click Certificates link on the Quick Launch menu on the CF Site Home page:



The system will redirect you to the Certificates list of employees' Certificates, sorted by Title, Status, Issued Date and Expiration Date:



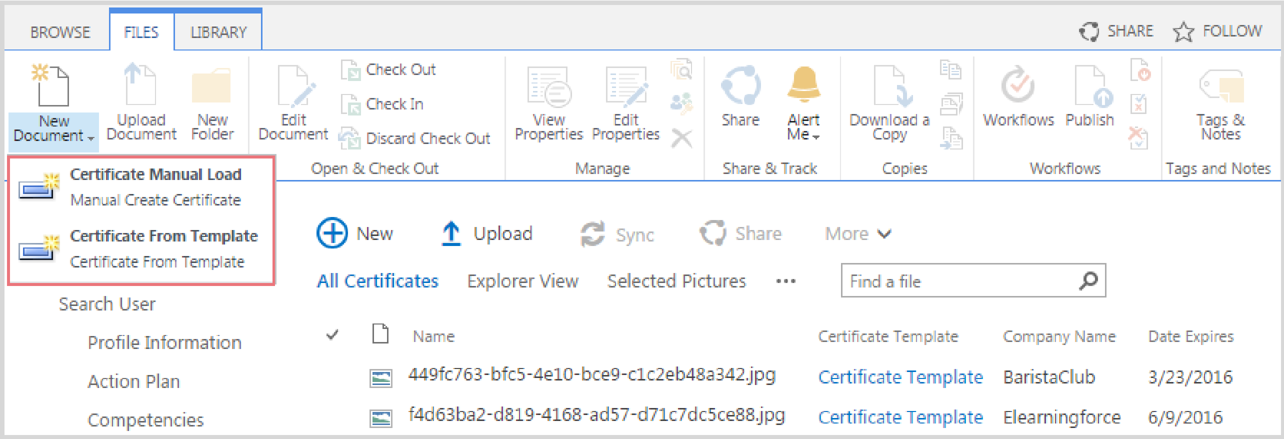
Click on the Certificate title to view it:



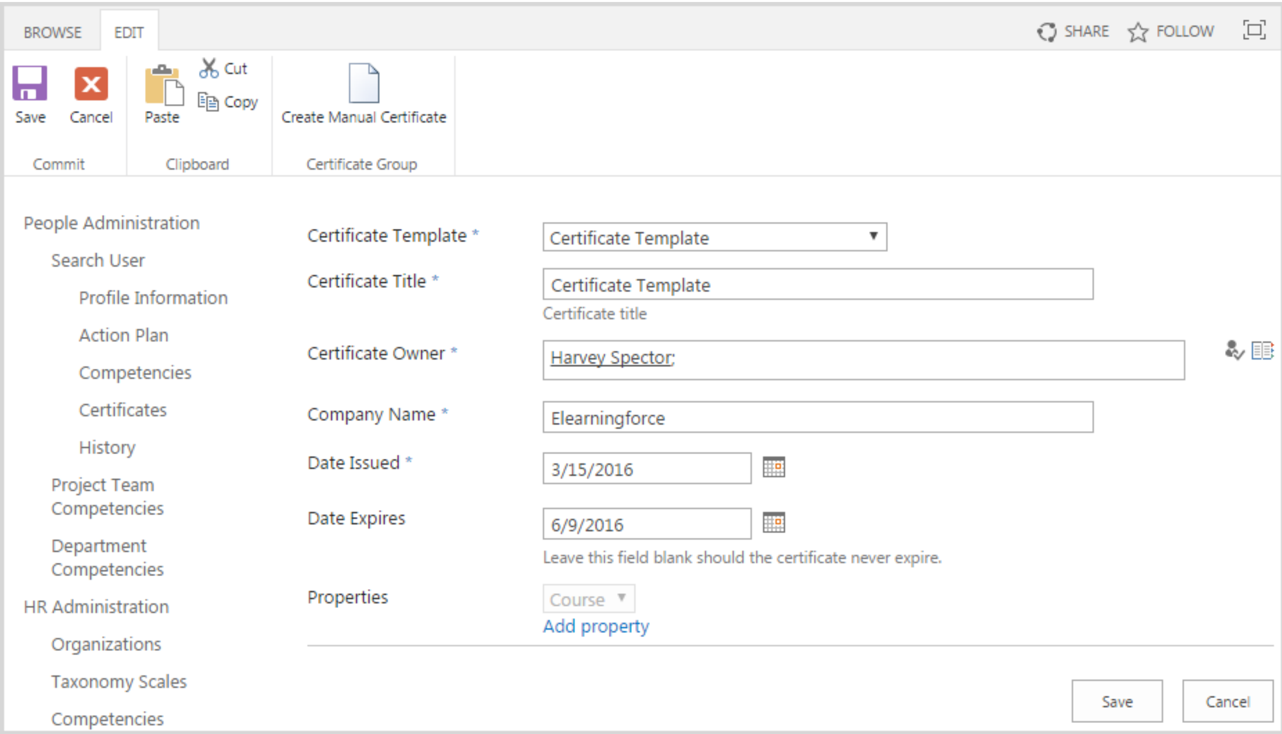
6.4.2.1 *Create Certificate*

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:



3) 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:

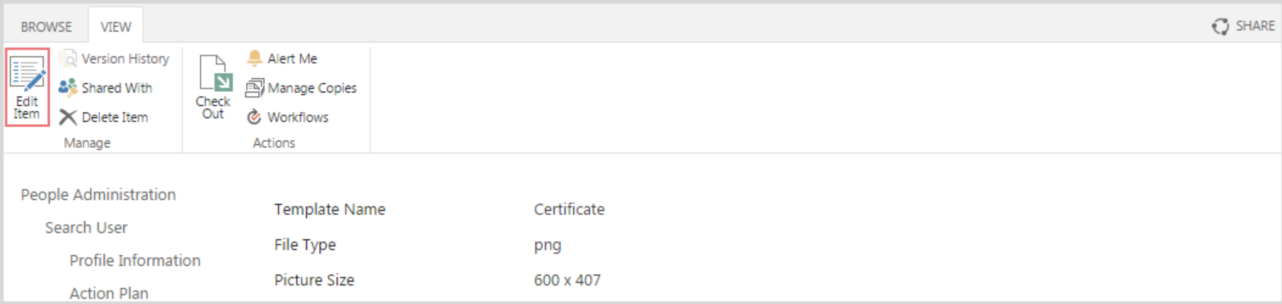


4) Click Save to create new Certificate or Cancel to discard all changes.

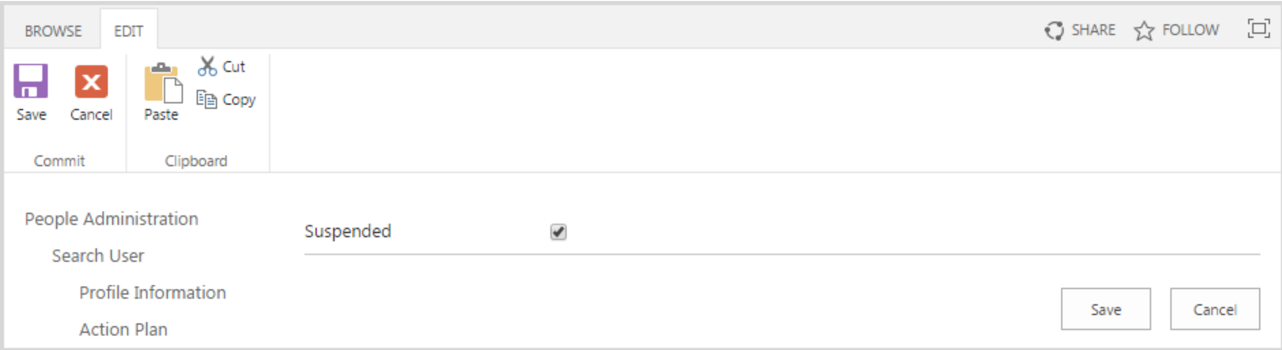
6.4.2.2 *Edit Certificate*

The User is able to change the Status of the Certificate to Suspended via the Edit form:

1) Go to Settings > Site Contents > Certificates, select the needed certificate from the list and open it for editing:



2) Check 'Suspend Certificate' option:



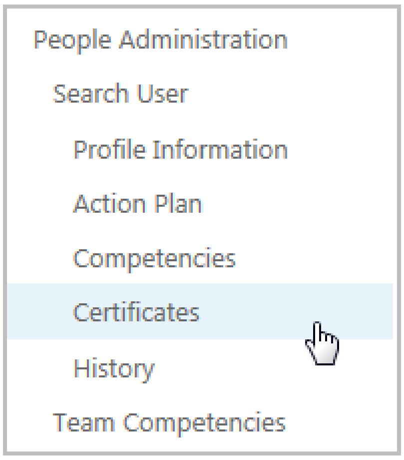
3) Click Save to save the changes or Cansel to discard changes.

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.

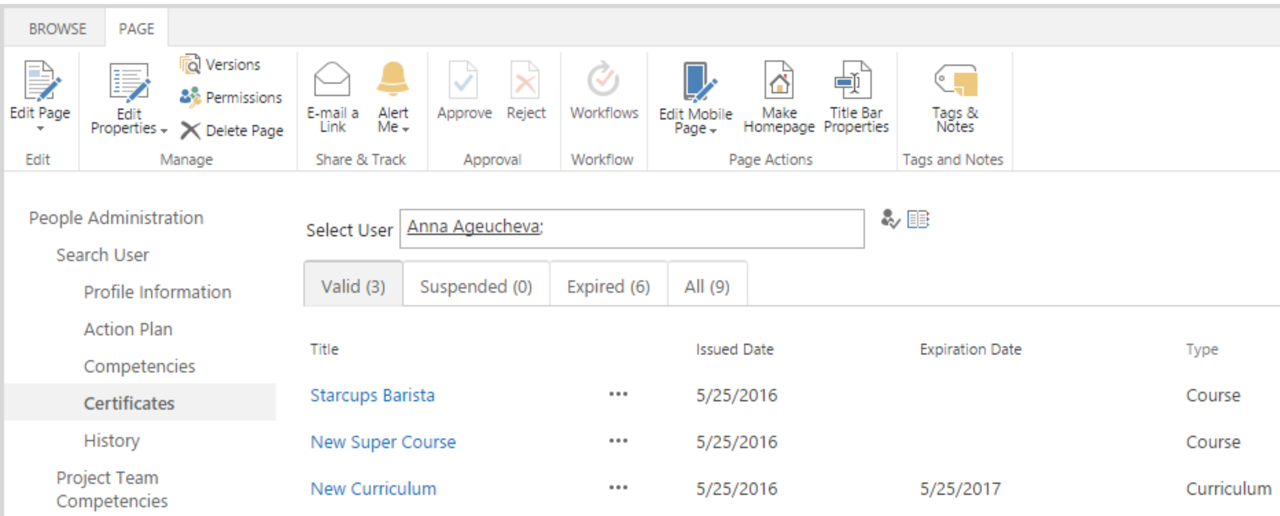
6.4.3.1 View Personal Certificates

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:



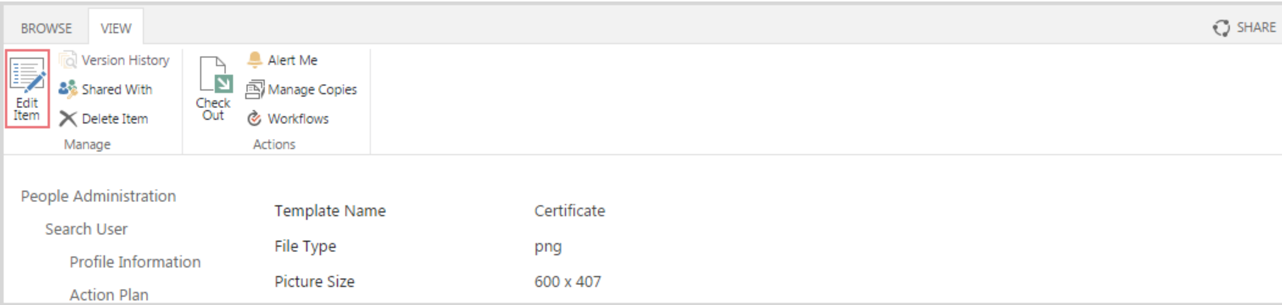
You can filter the Certificates of an employee by clicking on one of the following tabs:

– 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.

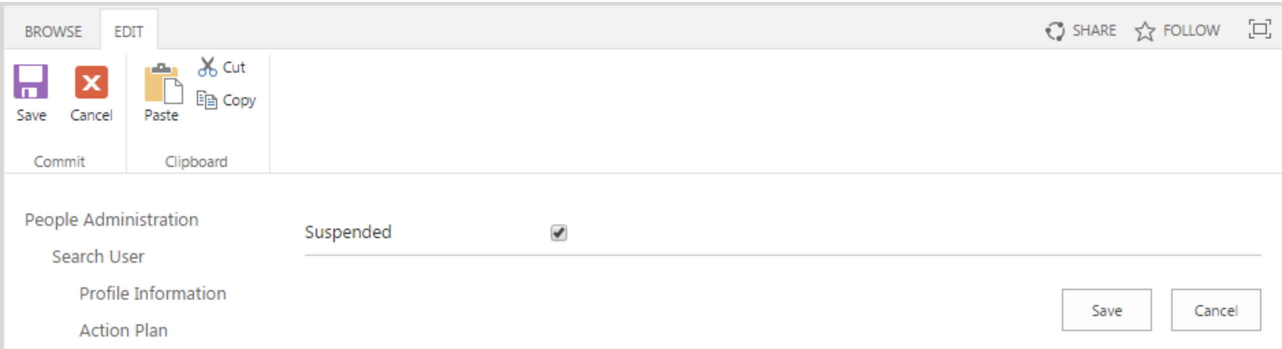
6.4.3.2 Suspend Certificate

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.

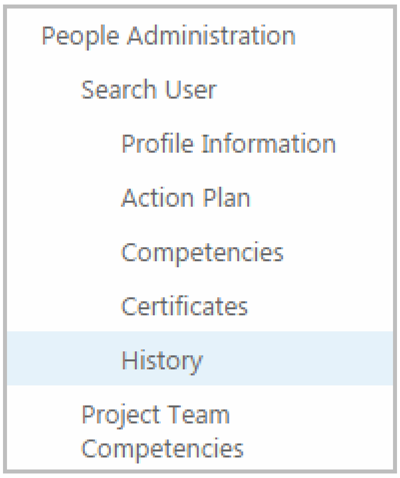
6.5 History

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:

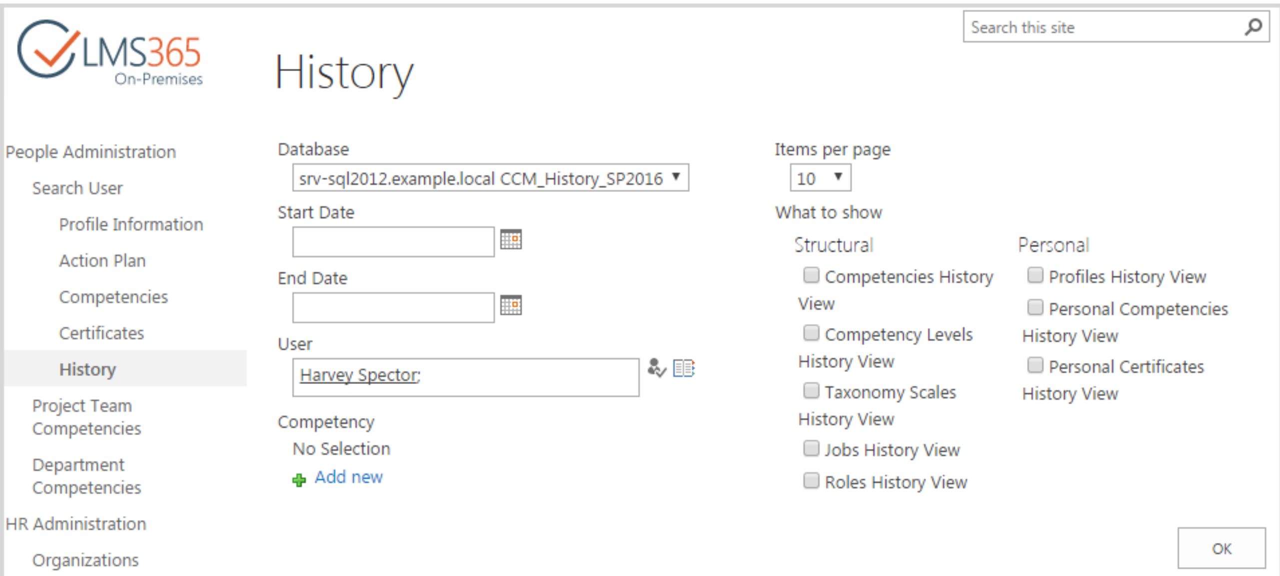
- person's profile data changes;
- person's certifications changes;
- person's competencies changes.

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:



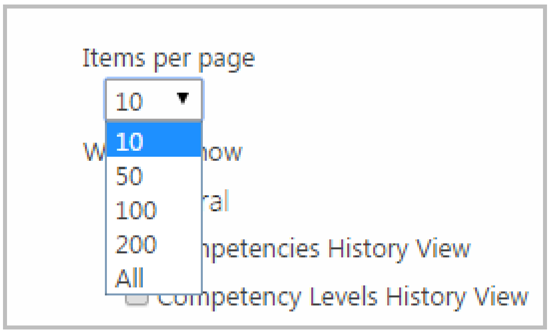
2) You will be redirected to the View History page. This page contains the filter, that will help you to define the search criteria for people profiles and competencies:



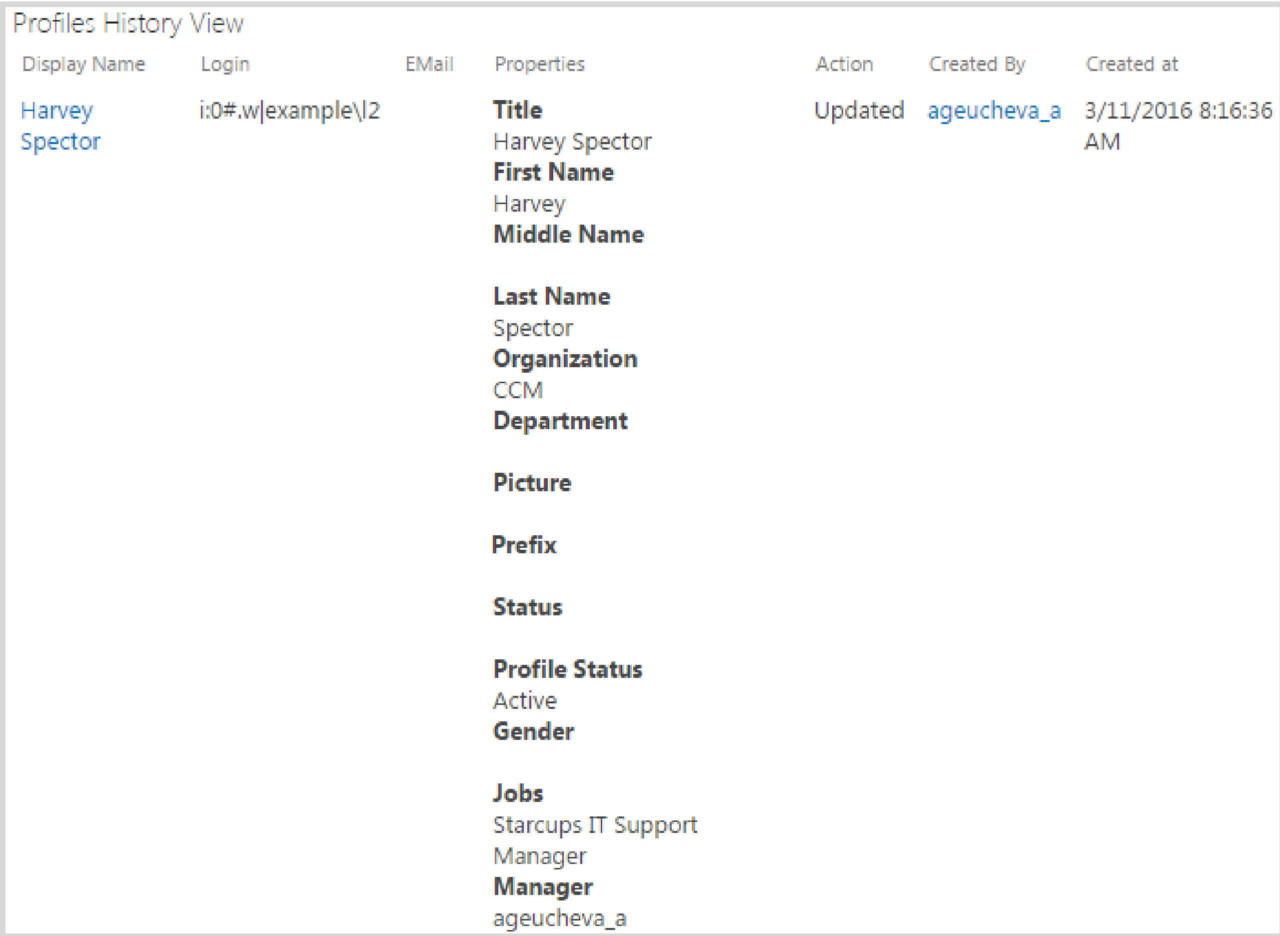
3) Set criteria in the Filter.
Note, that the Start Date is a required field.
If End Date field is left empty, the period till the present moment is considered.

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:



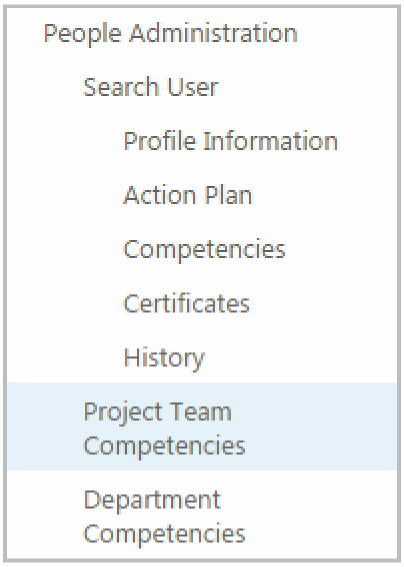
6.6 Project Team Competencies

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.

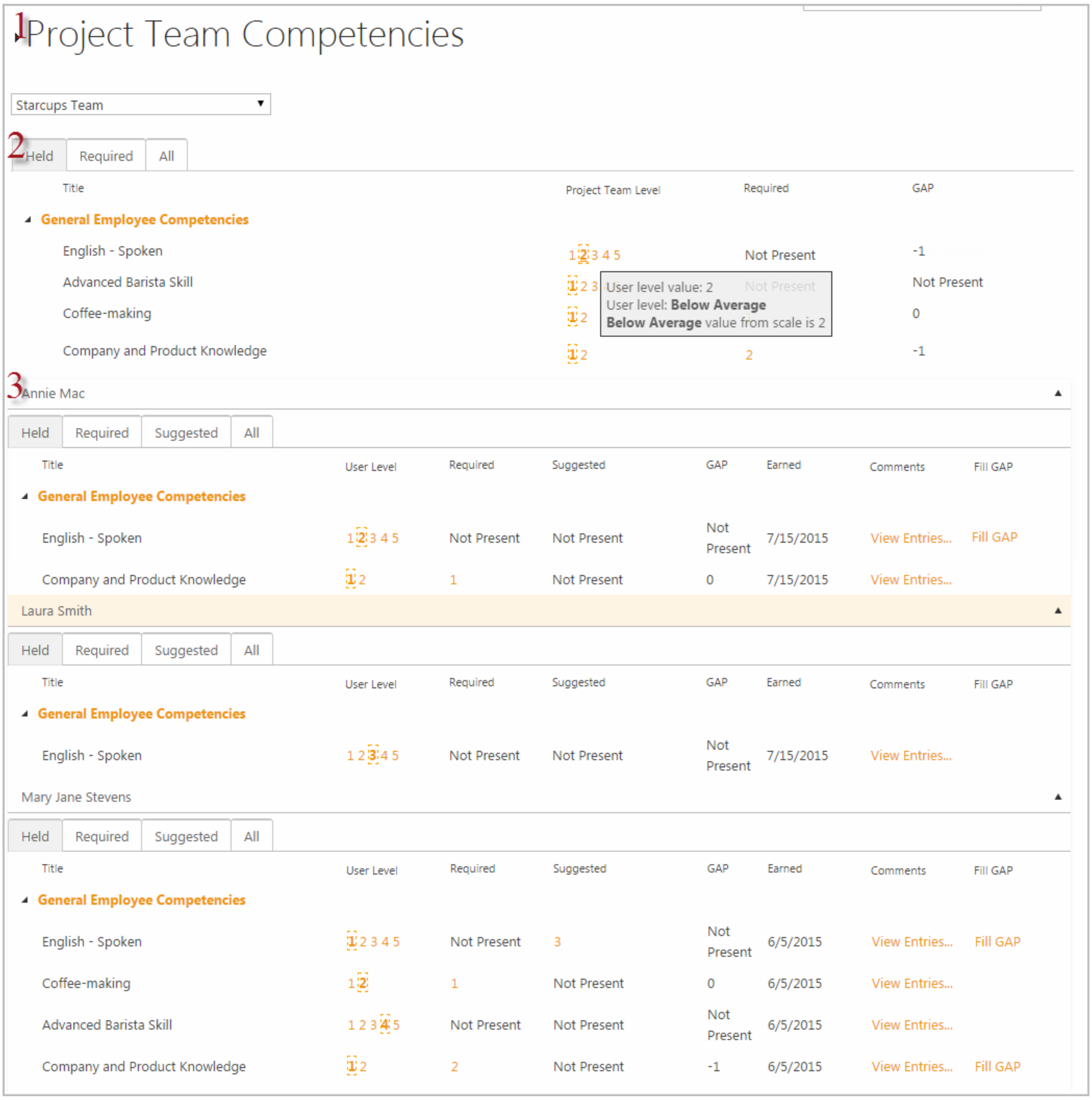
6.6.1 View Project Team Competencies

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) 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):
    - Held – the list of Competencies that are currently held by at least one Project Team Member;
    - Required – the list of Competencies that is required for at least one Project Team Member;
    - 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:

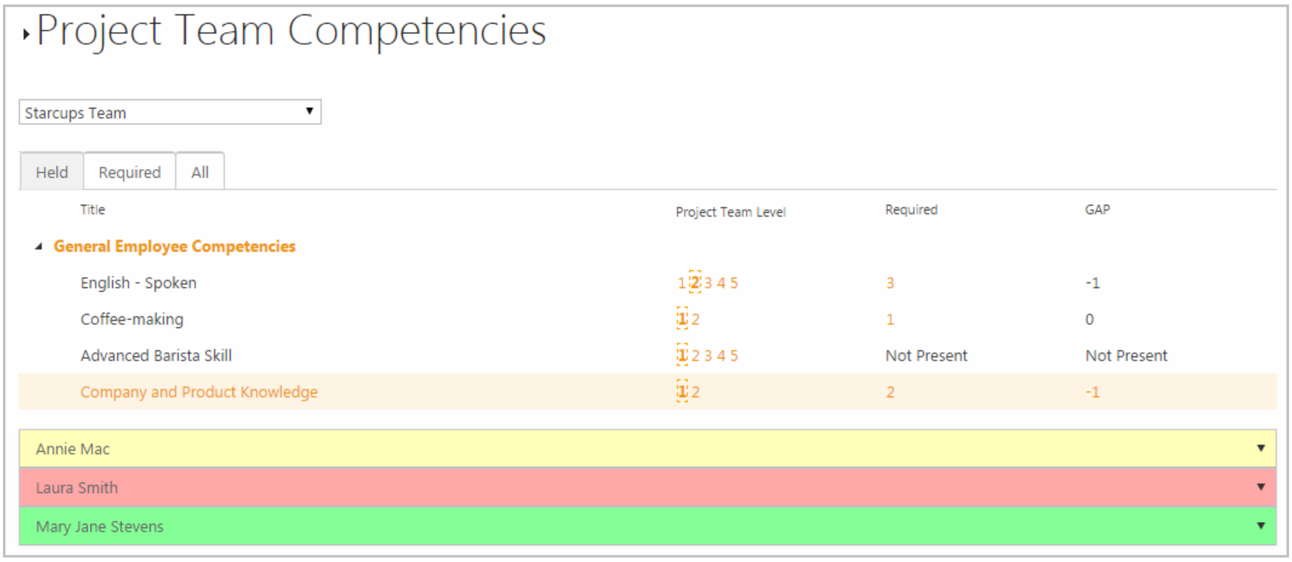
1. Project Team level value is calculated:
   Annie Mac –User Level 2;
   Laura Smith – User Level 3;
   Mary Jane Stevens – User Level 1;
   The total number of points is divided by the number of project team members: 6/3 = 2
2. The Gap is calculated:
   The Required level is abstracted from the Project 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:



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 pained 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.

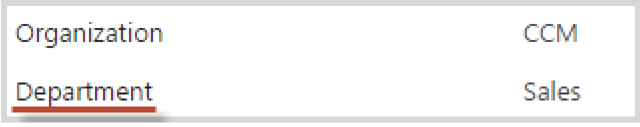
6.6.2.2 Grant Competency for Project Team Member

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 pained 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.

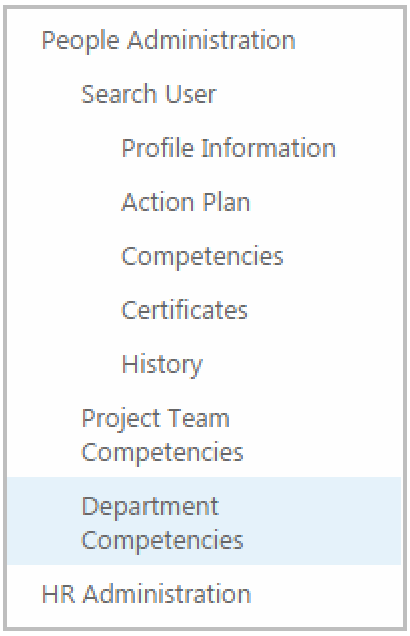
6.7 Department Competencies

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:

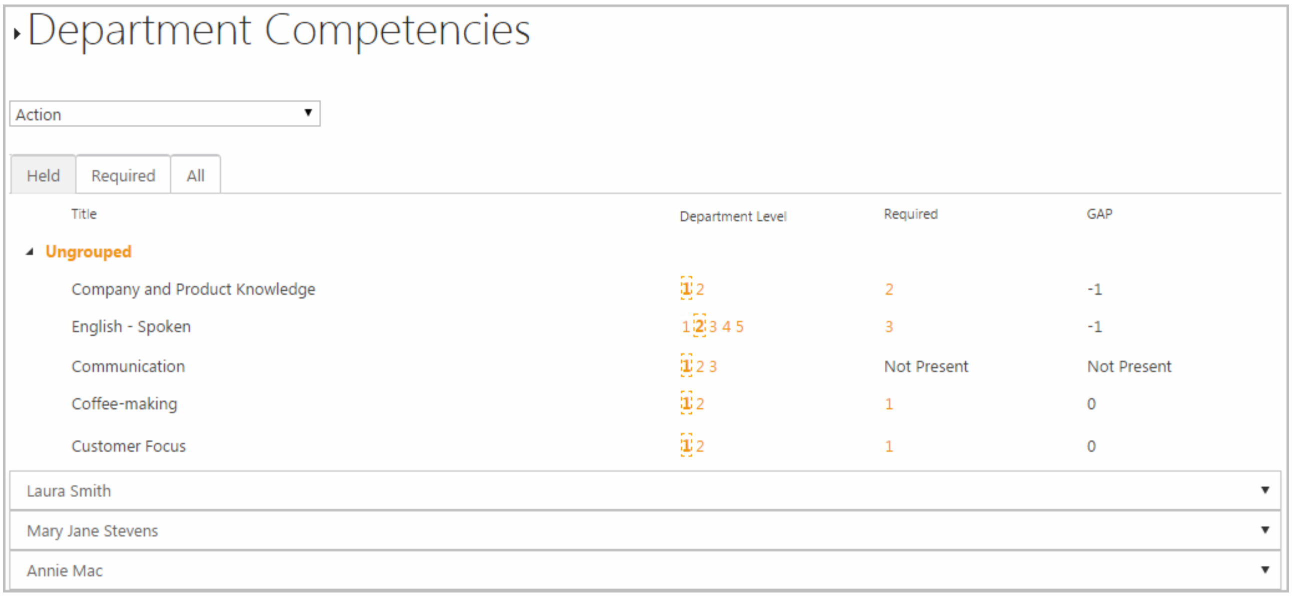


To view Department Competencies and assess Department Competency Gap, follow these steps:

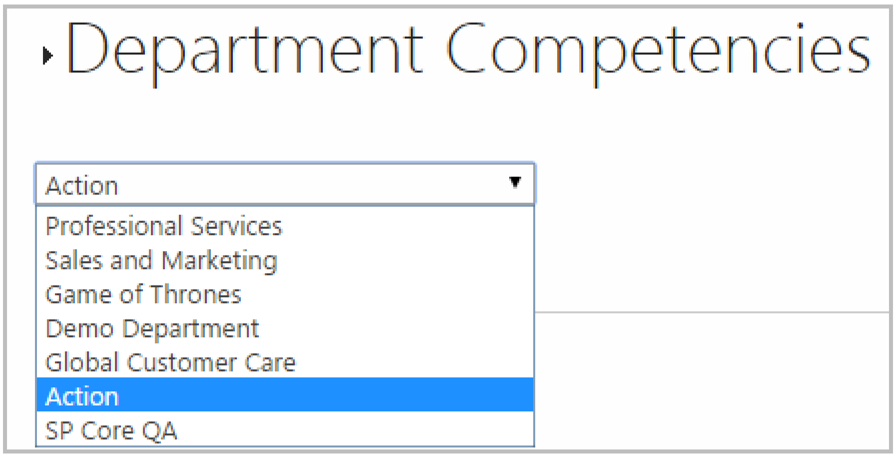
1) In People Administration section on the Quick Launch menu click on Department Competencies:



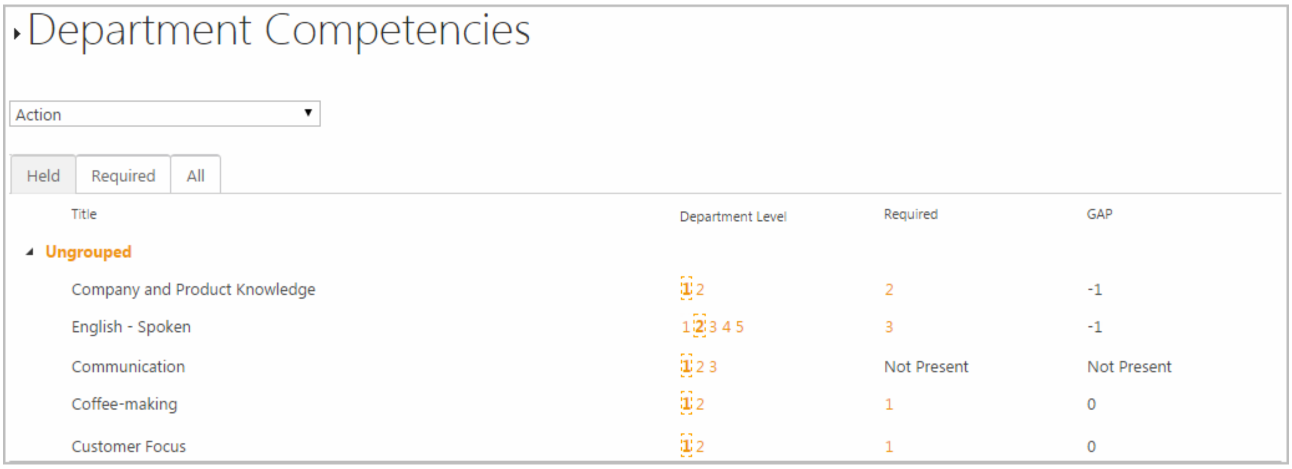
2) You will be redirected to Department Competencies page:



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:



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.

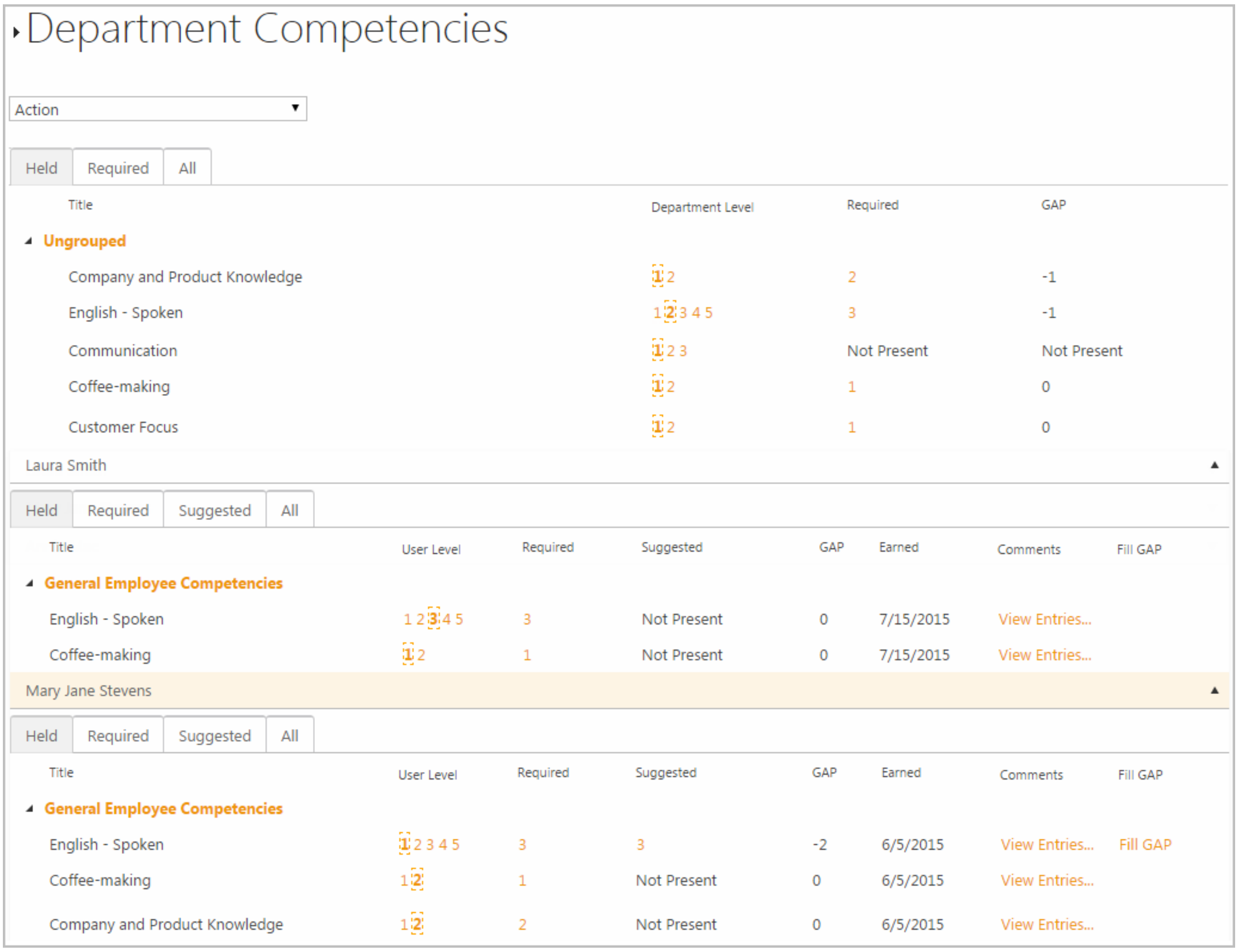
Required is the Required Level for the Department Competency that is the highest Required Level for this Competency from the Personal Competencies of Department Members

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	1 2	2	-1
English - Spoken	1 2 3 4 5	3	-1
Communication	1 2 3	Not Present	Not Present
Coffee-making	1 2	1	0
Customer Focus	1 2	1	0

Laura Smith

Held | Required | Suggested | All

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
General Employee Competencies							
English - Spoken	1 2 3 4 5	3	Not Present	0	7/15/2015	View Entries...	
Coffee-making	1 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	1 2 3 4 5	3	3	-2	6/5/2015	View Entries...	Fill GAP
Coffee-making	1 2	1	Not Present	0	6/5/2015	View Entries...	
Company and Product Knowledge	1 2	2	Not Present	0	6/5/2015	View Entries...	

The User can mark who out of the Depatment members has the Depatment Competency by selecting the Depatment Competency in the Depatment Competencies list:

The system colors the user names of the Depatment Members in the following way:

- Red – if the Depatment Member does not possess the selected Depatment Competency;
- Yellow – if the Depatment Member does have the selected Depatment Competency but the Competency Level is lower than the Required Level for the Depatment Competency;
- Green - if the Depatment Member does have the selected Depatment Competency and the Competency Level is the same or higher than the Required Level for the Depatment Competency:

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:

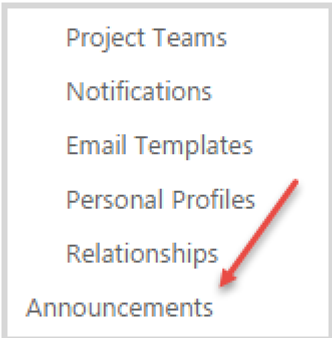
1) Click on the Department Member's user name pained red to select him from the list;
2) The Department Member's user names will be coloured according to the rules described in Chapter 6.7 Department Competencies;
3) Click Grant Competency on the ribbon in the Competencies Tools. Refer to the section 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):



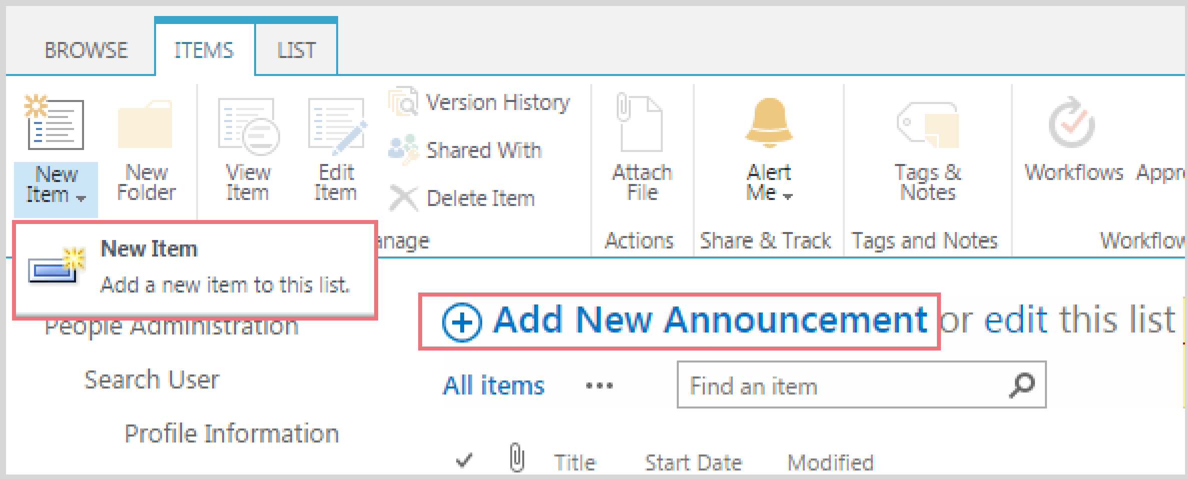
7.1 Add Announcement

To add a new Announcement to the Announcement list, follow these steps:

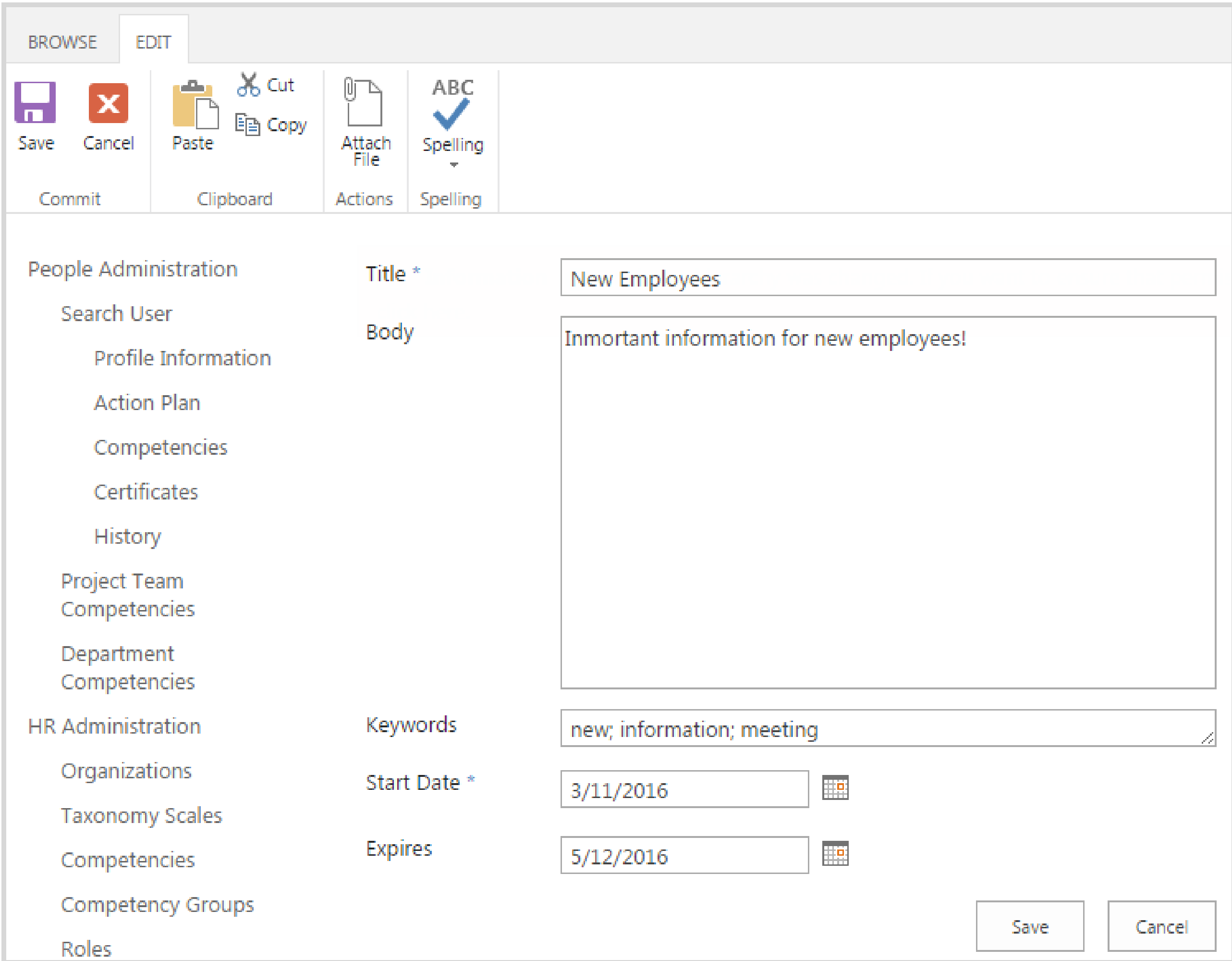
1) Click Add New Announcment button ;

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.

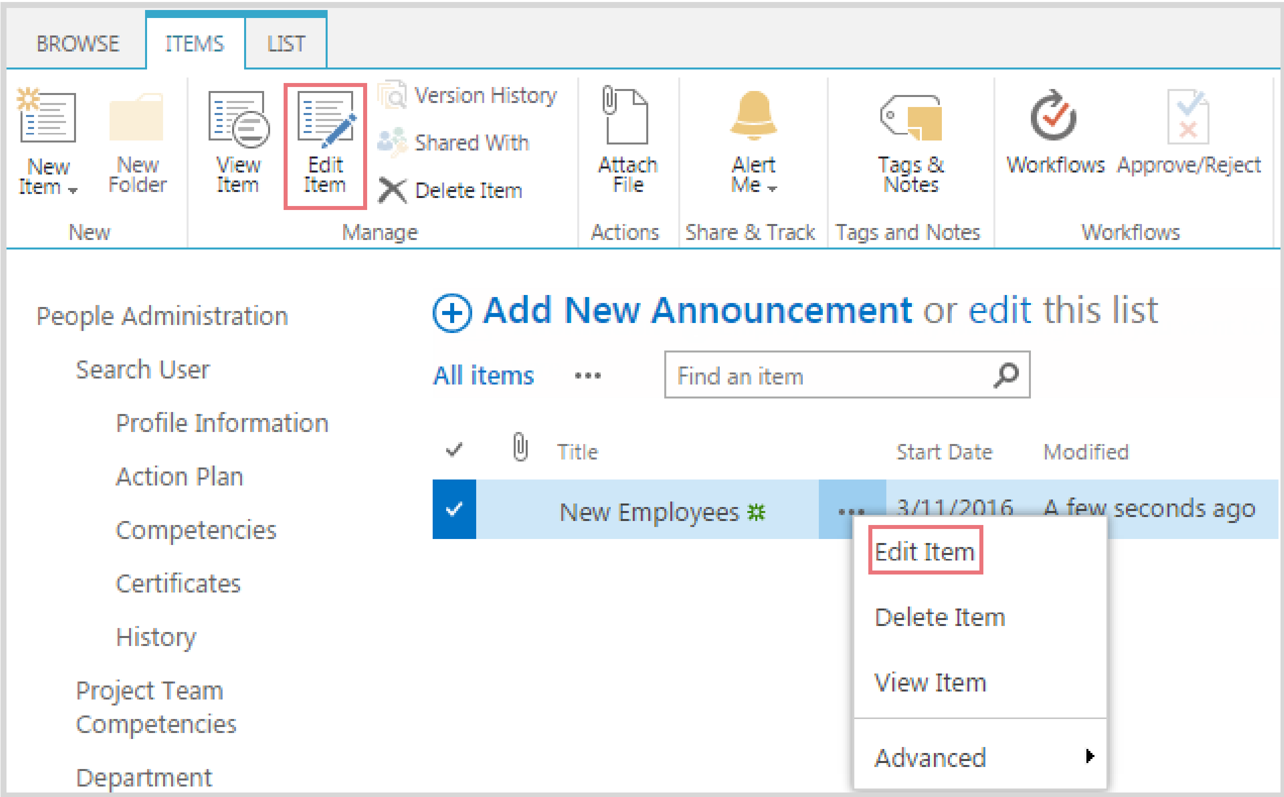
7.2 Edit Announcement

To edit the Announcement, follow these steps:

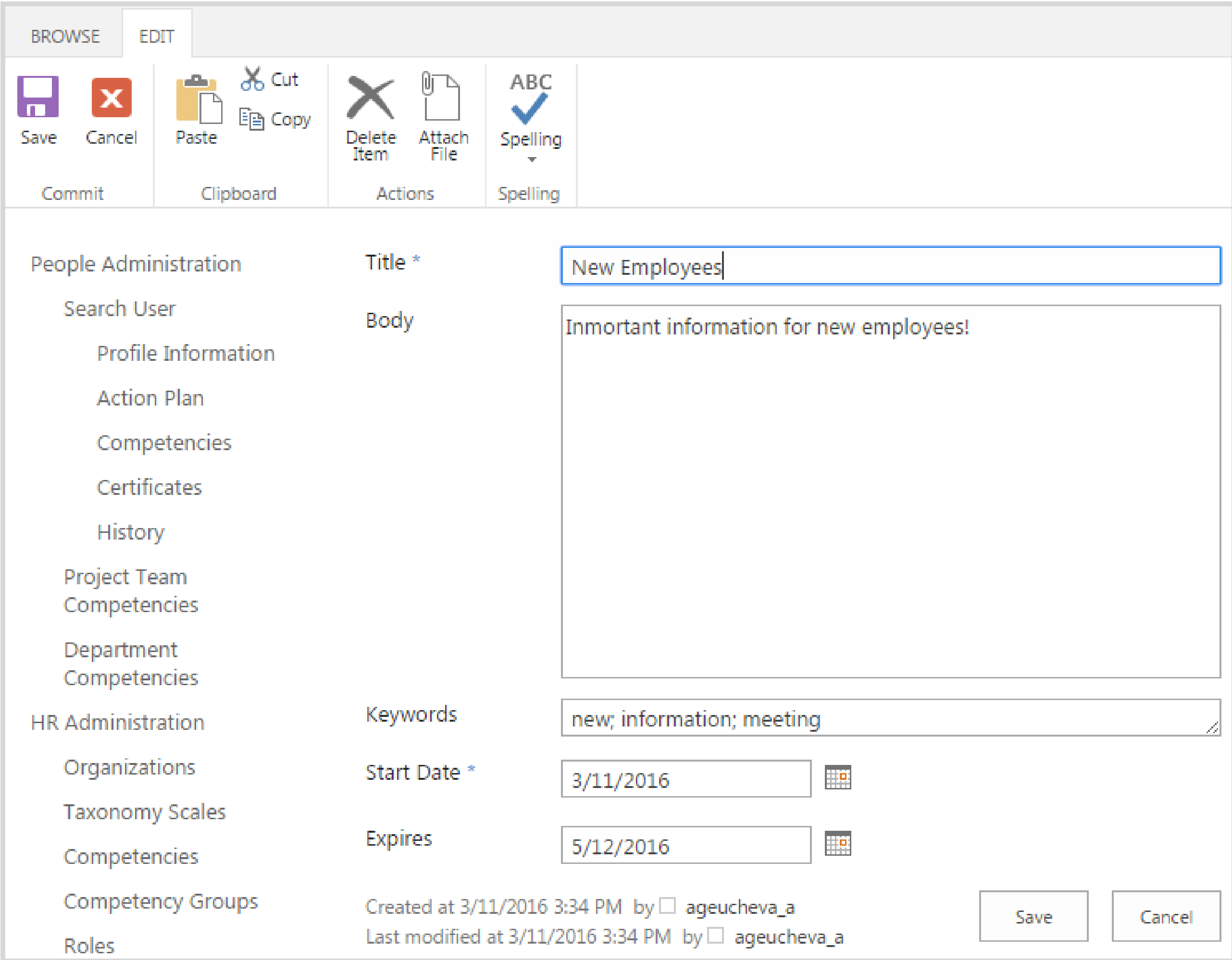
1) Click Edit Item from the drop-down list next to the Announcement's Title;

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.

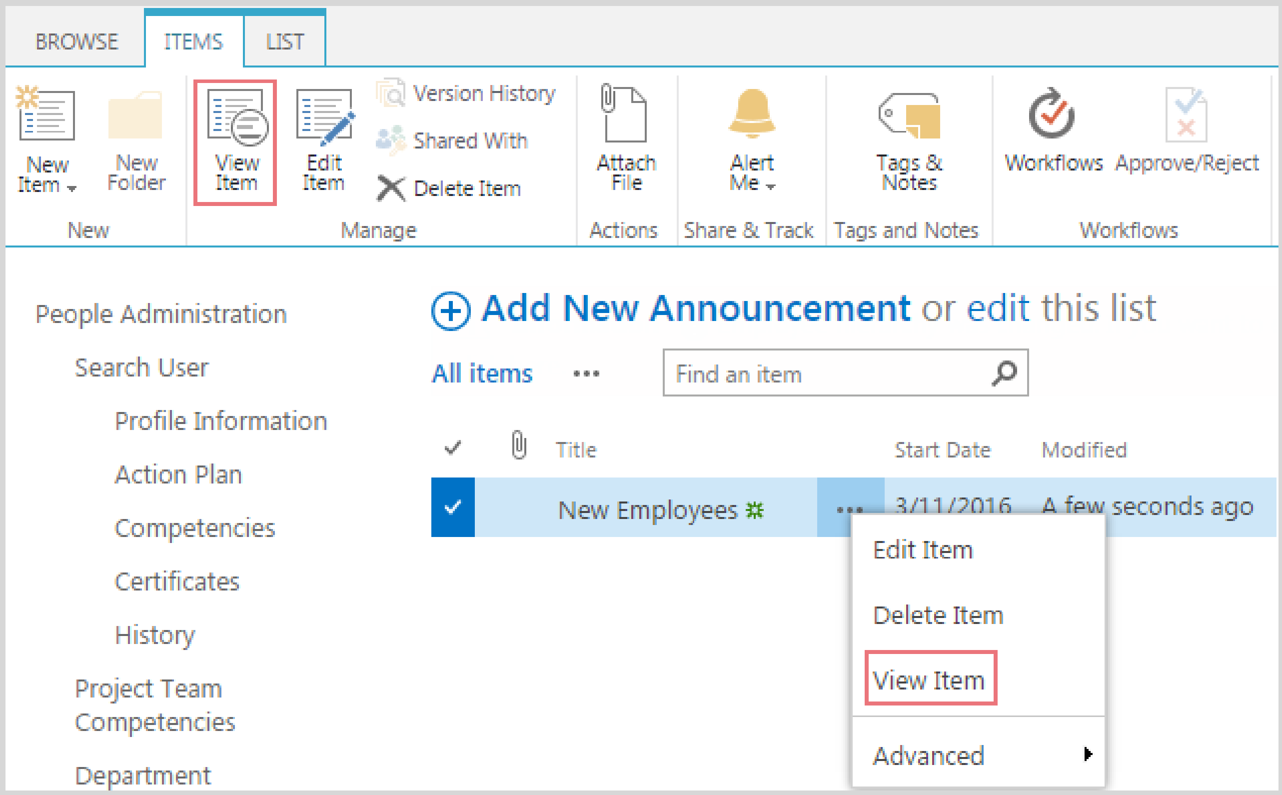
7.3 View Announcement

The Announcement becomes visible once the Start Date comes. To view the Announcement, follow the steps below:

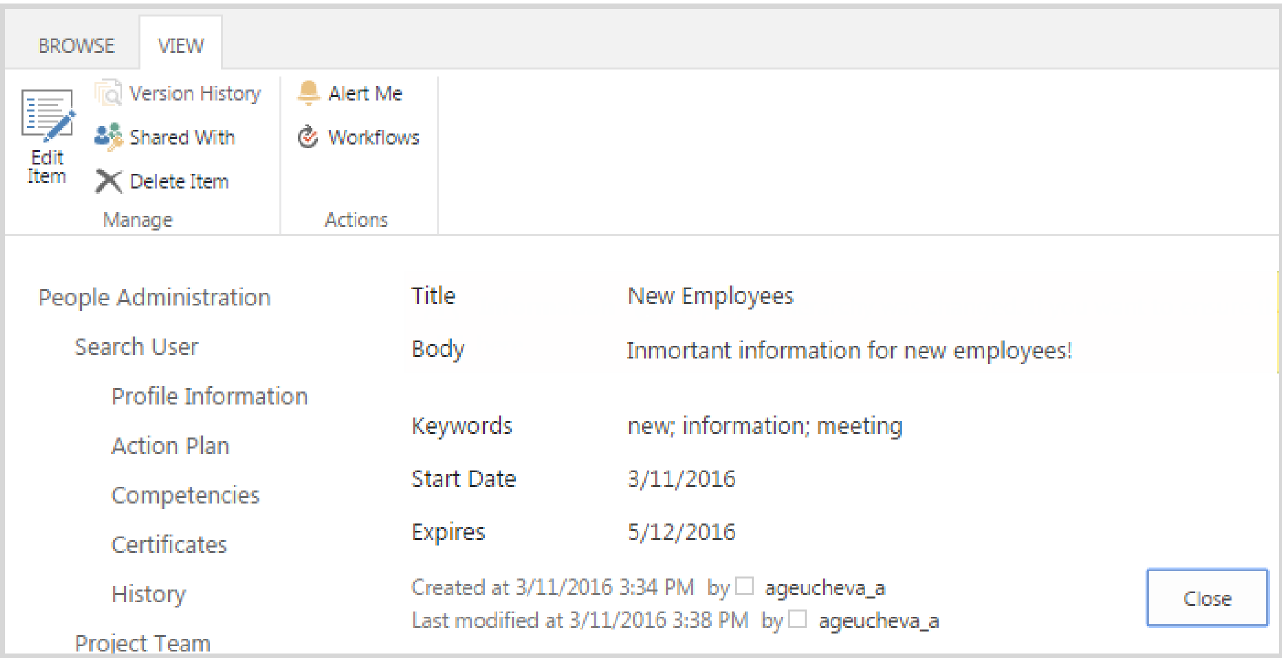
1) Click View Item from the drop-down list next to the Announcement Title;

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.

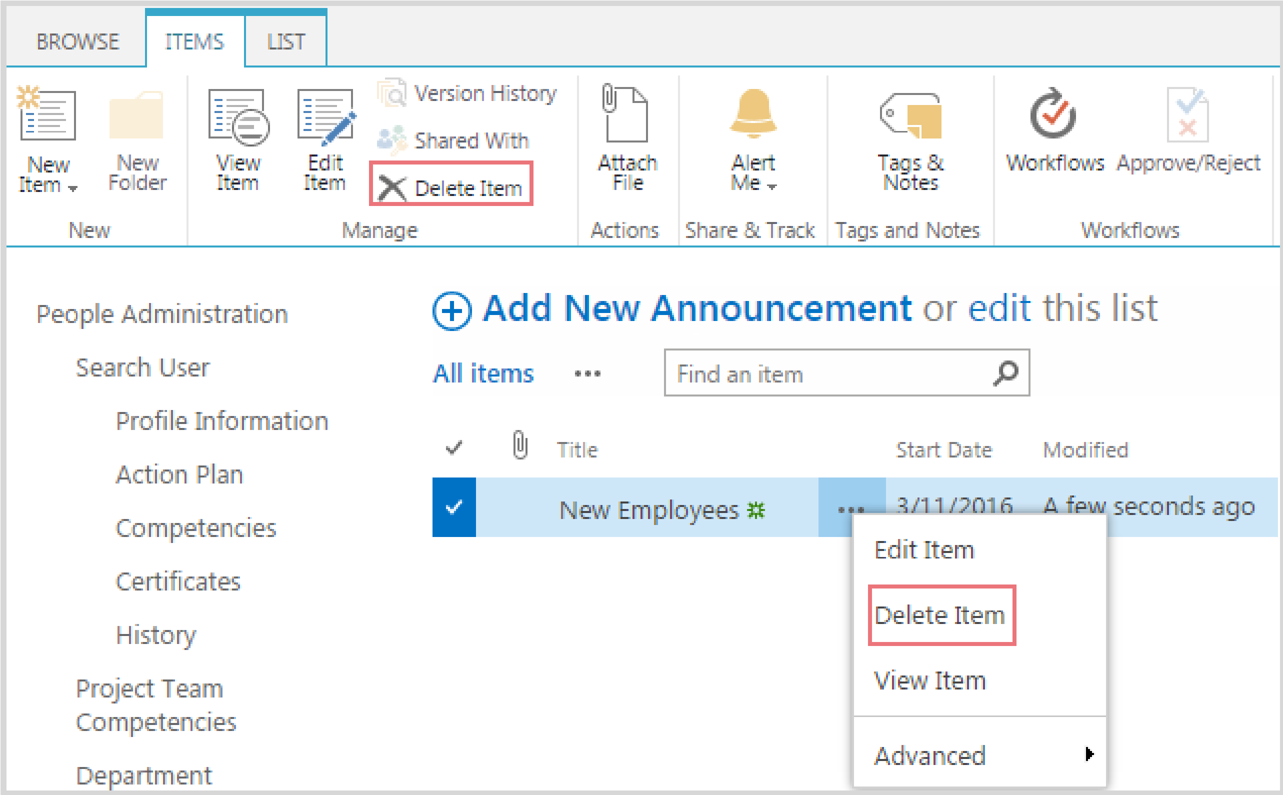
7.4 Delete Announcement

To delete the Announcement, follow these steps:

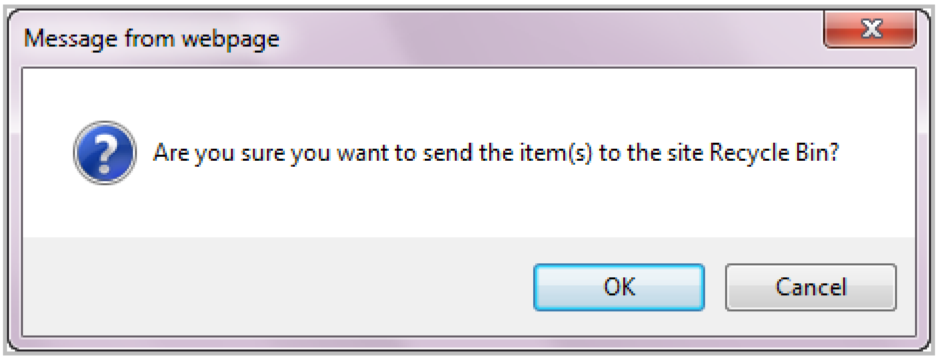
1) Click Delete Item from the drop-down list next to the Announcement's Title;

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:

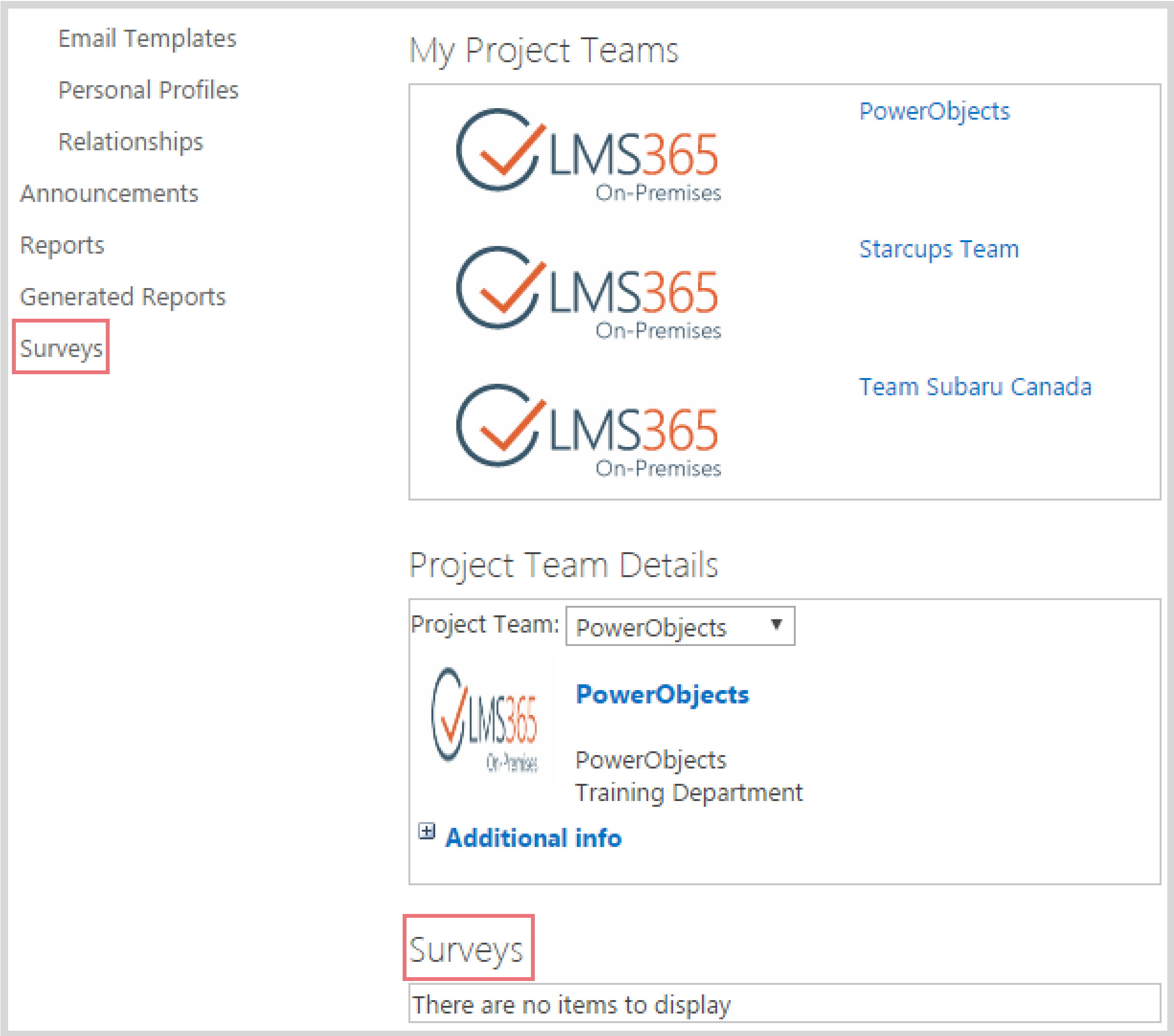


4) Click OK button to confirm the decision OR Cancel button to discard the changes.

You will be redirected to the Announcements list, where the removed Announcement is no longer displayed.

8 SURVEYS

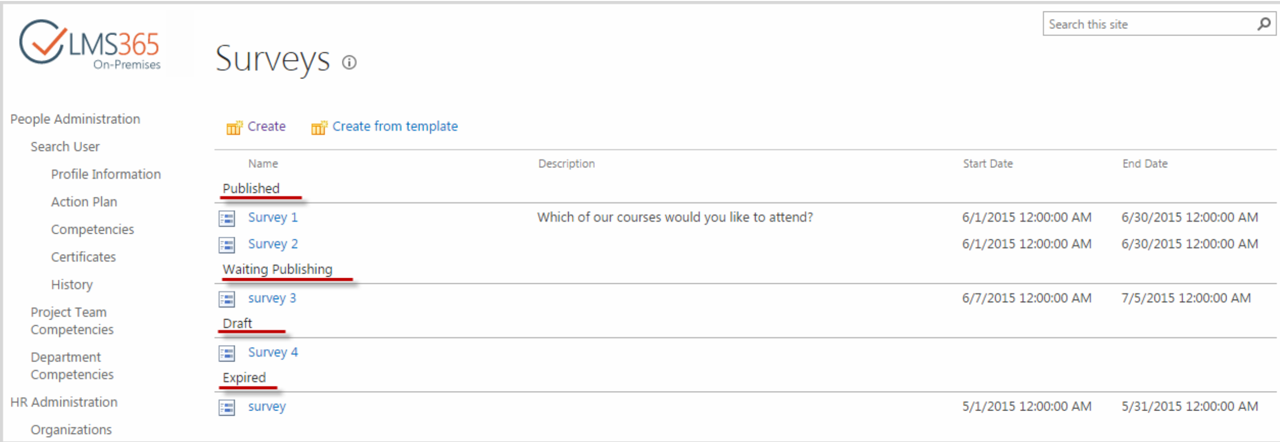
SharePoint CCM Surveys allow accumulating the information about the general SharePoint CCM users. By default, the Survey link can be found on the main host page both on the left side menu and in the main page field as a separate web part:



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:



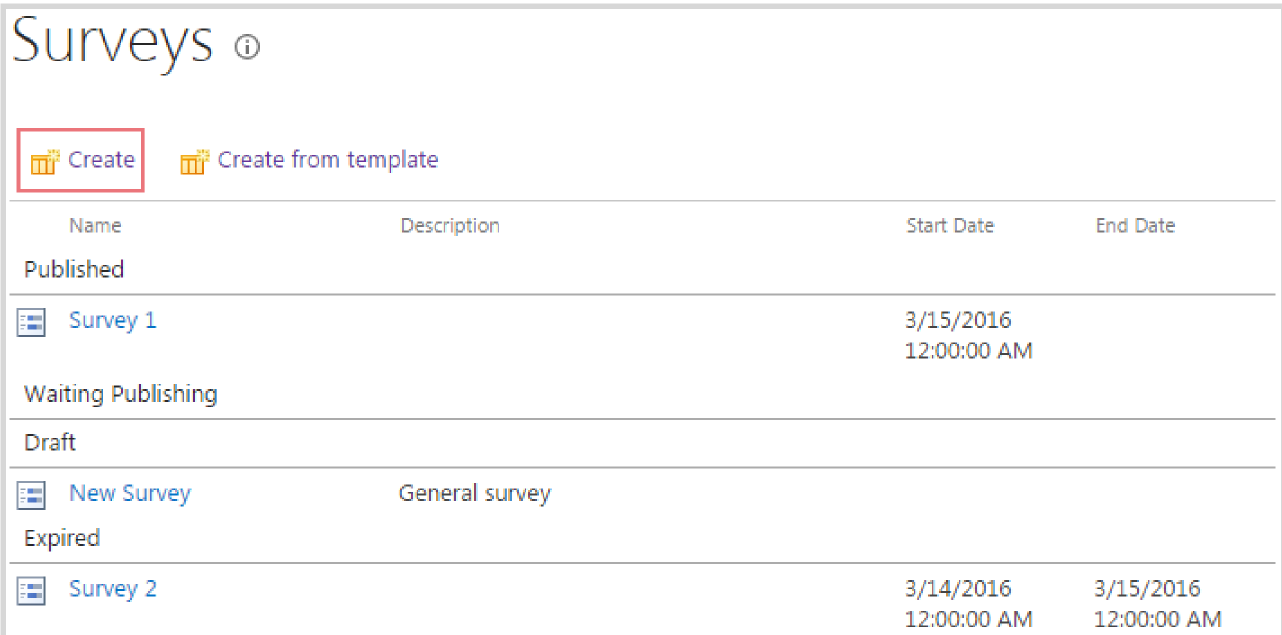
8.1 Create Survey

The User can create both standard and template-based SharePoint CCM surveys.

8.1.1 Create Standard Survey

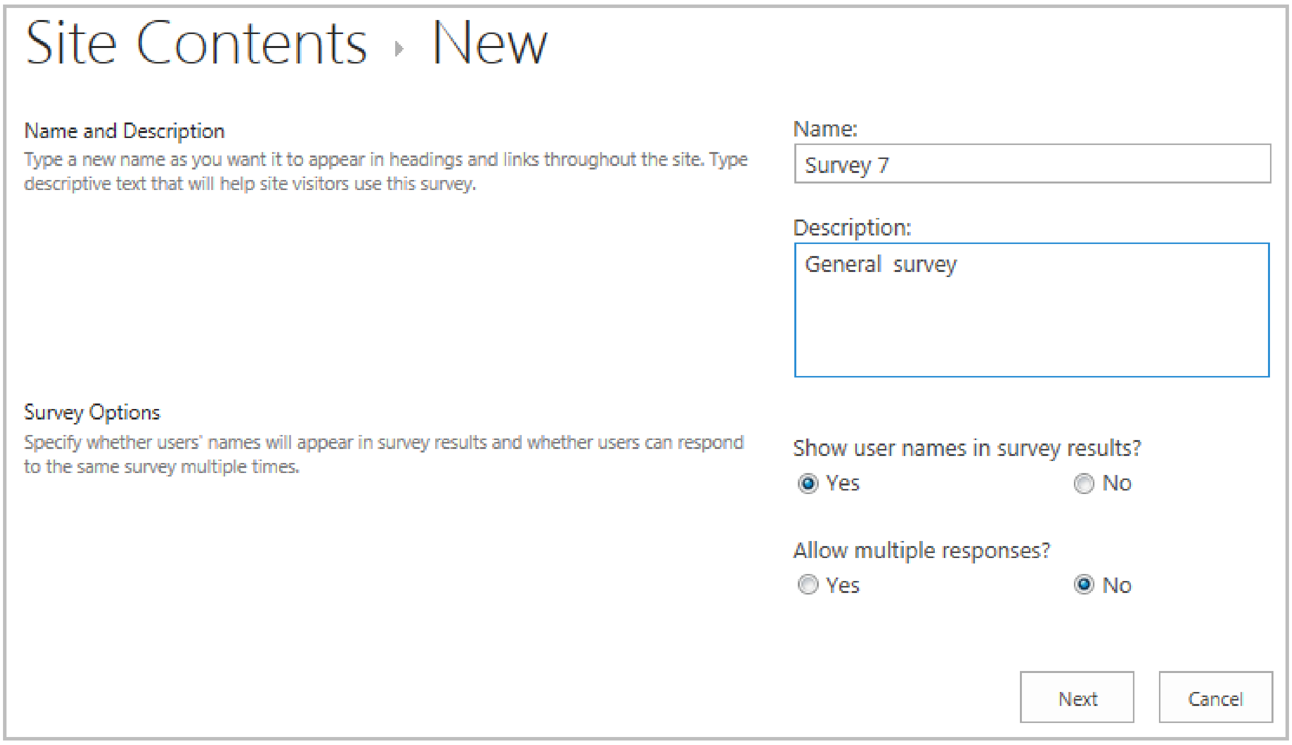
To create a standard SharePoint CCM survey, do the following:

1) On the left side menu click Surveys;
2) Once you have done it, the following page will appear:



3) Click Create;

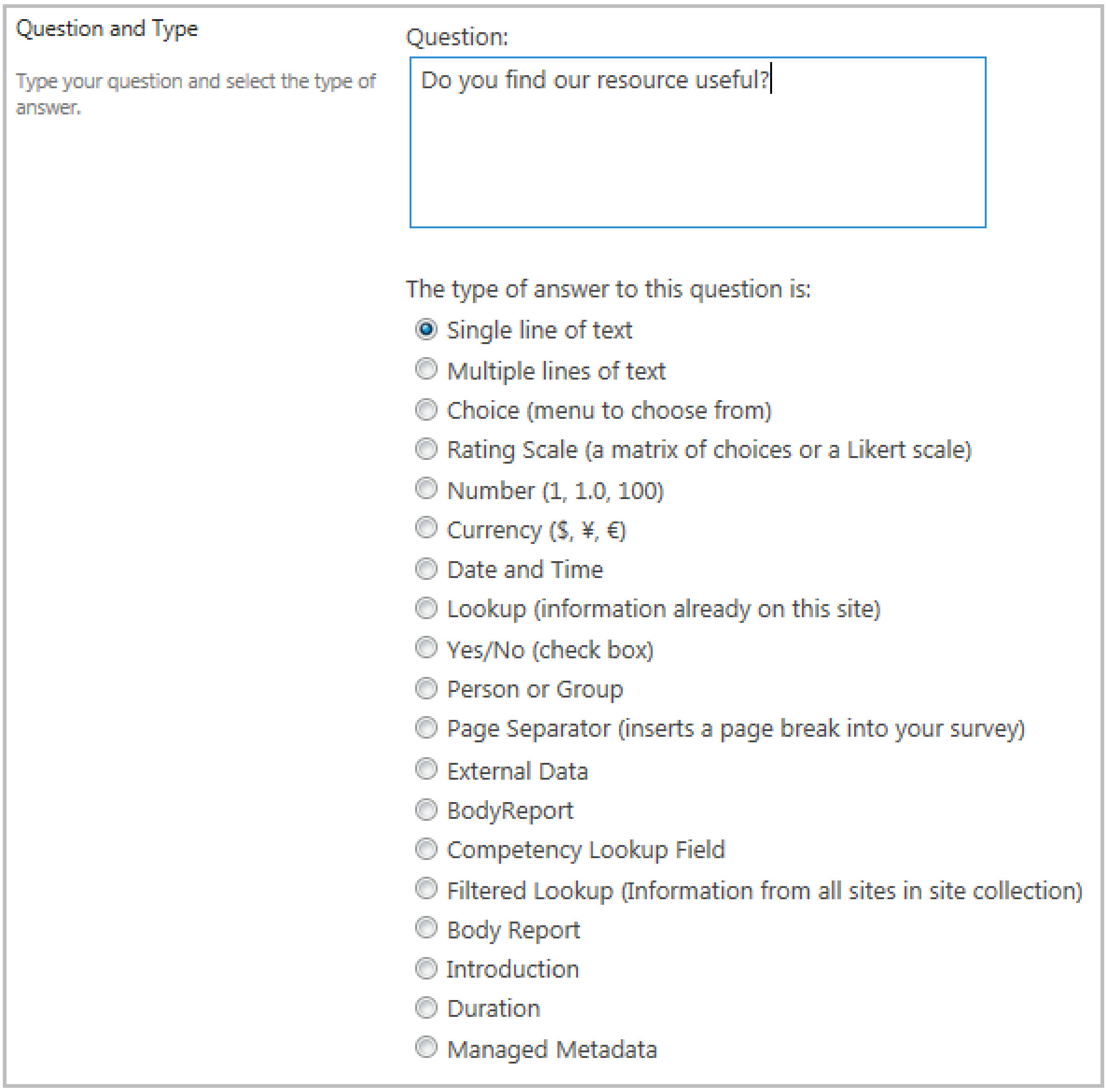
4) The following form will appear:



- 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?

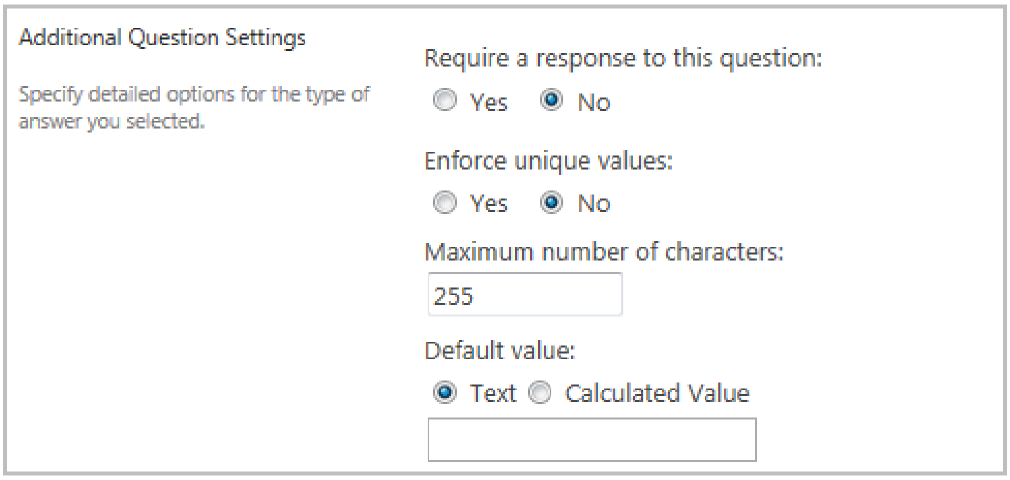
The type of answer to this question is:

- (•) 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:

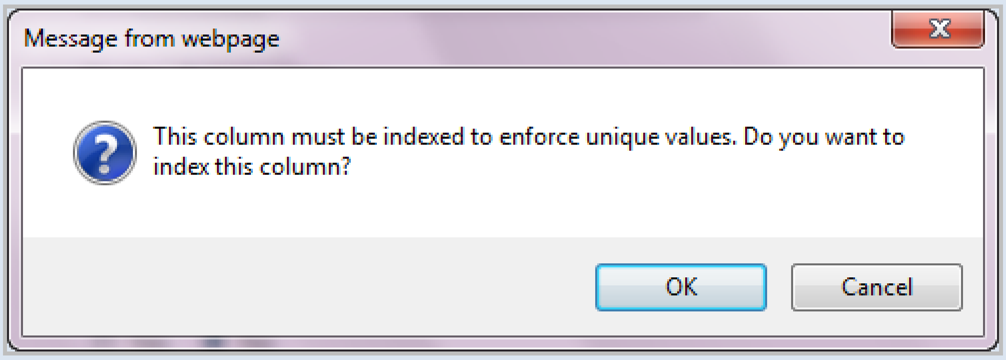
- Single line of text;

Specify the additional settings filling in the form:



- 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:

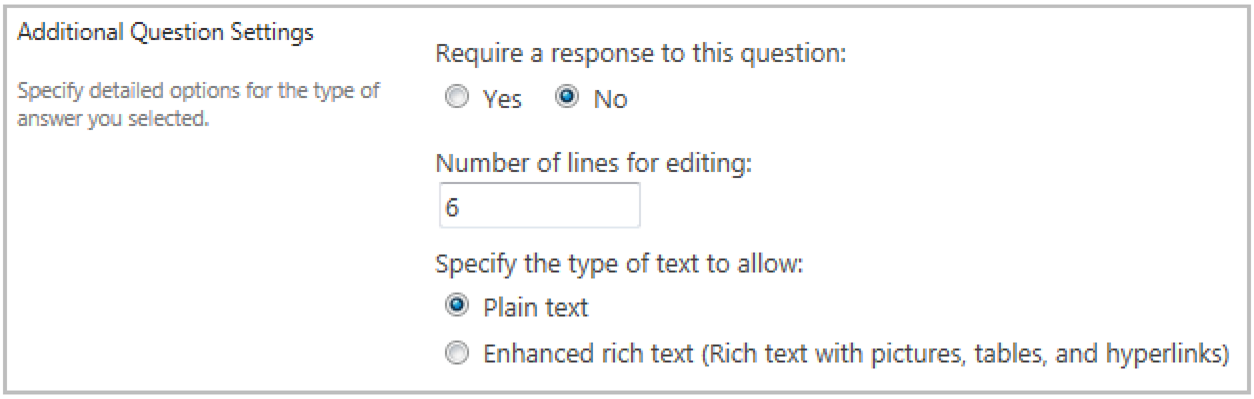


The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- 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;

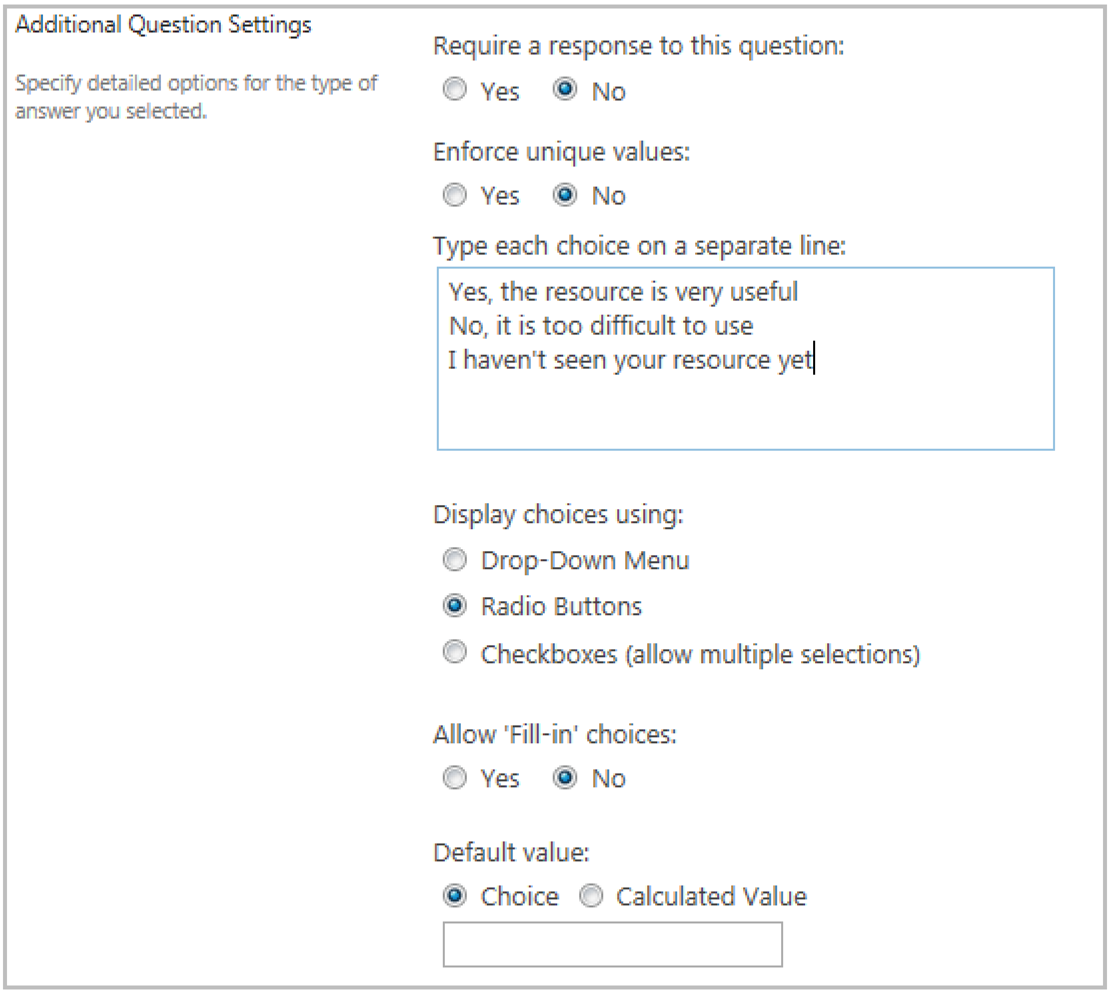
Specify the additional settings filling in the form:



- 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.

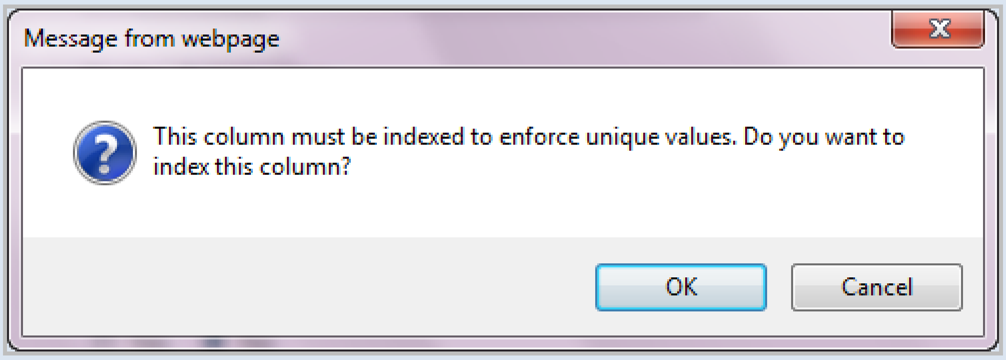
– Choice (menu to choose from);

Specify the additional settings filling in the form:



- 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:



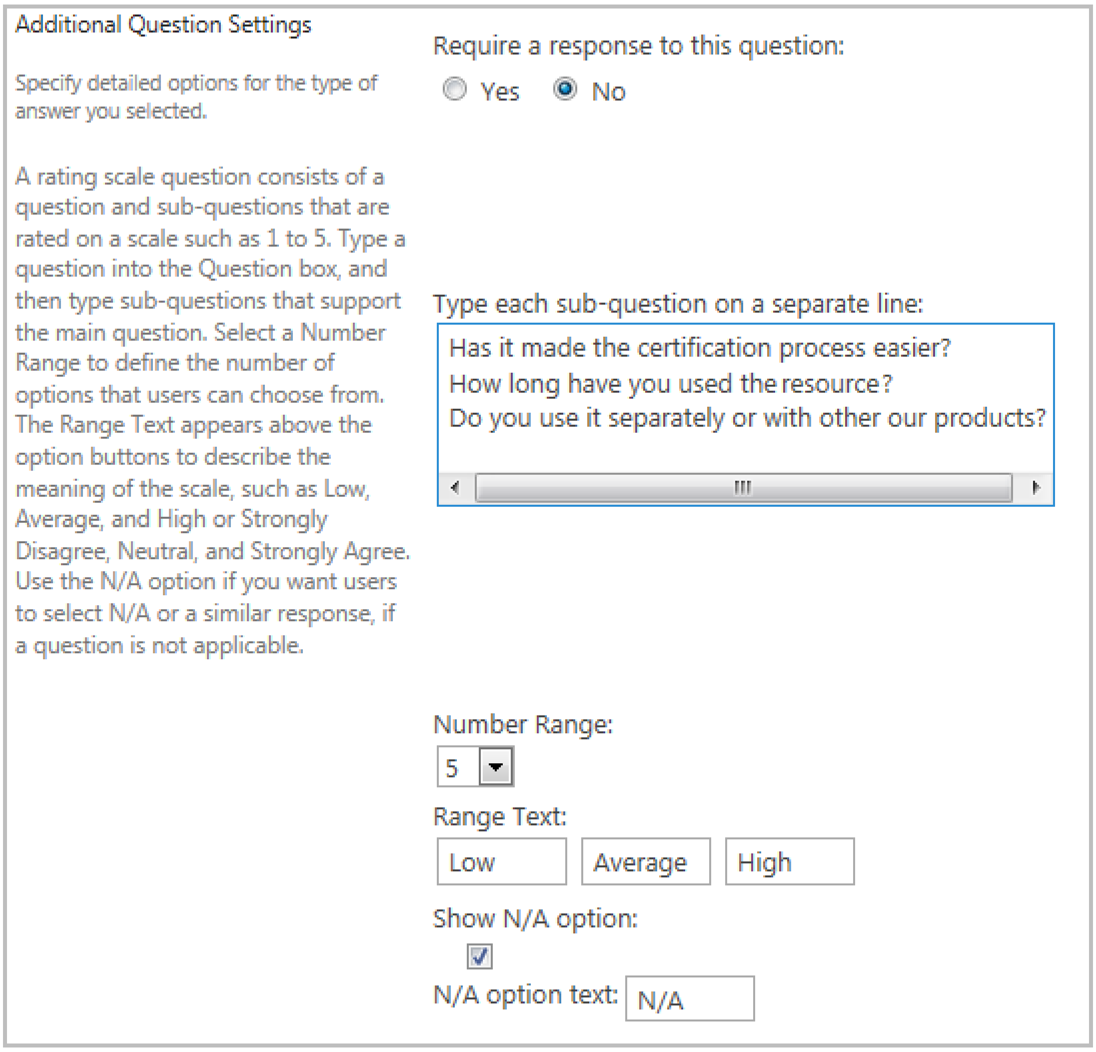
The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- 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.

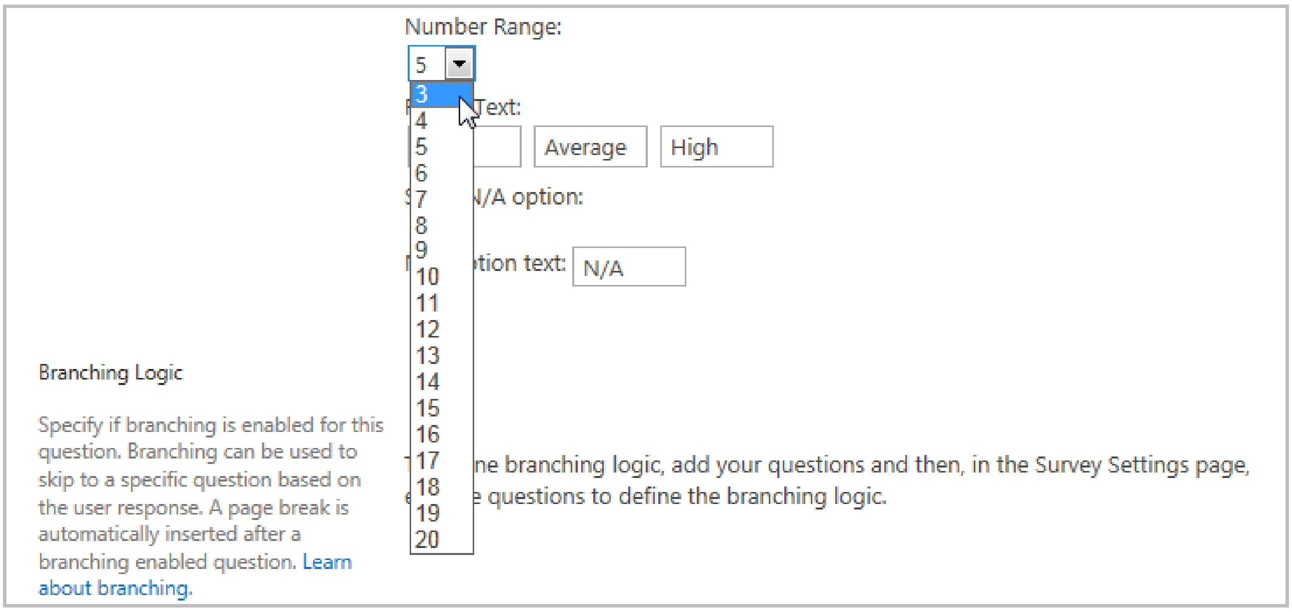
– Rating Scale (a matrix of choices or a Likert scale);

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:



- 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:

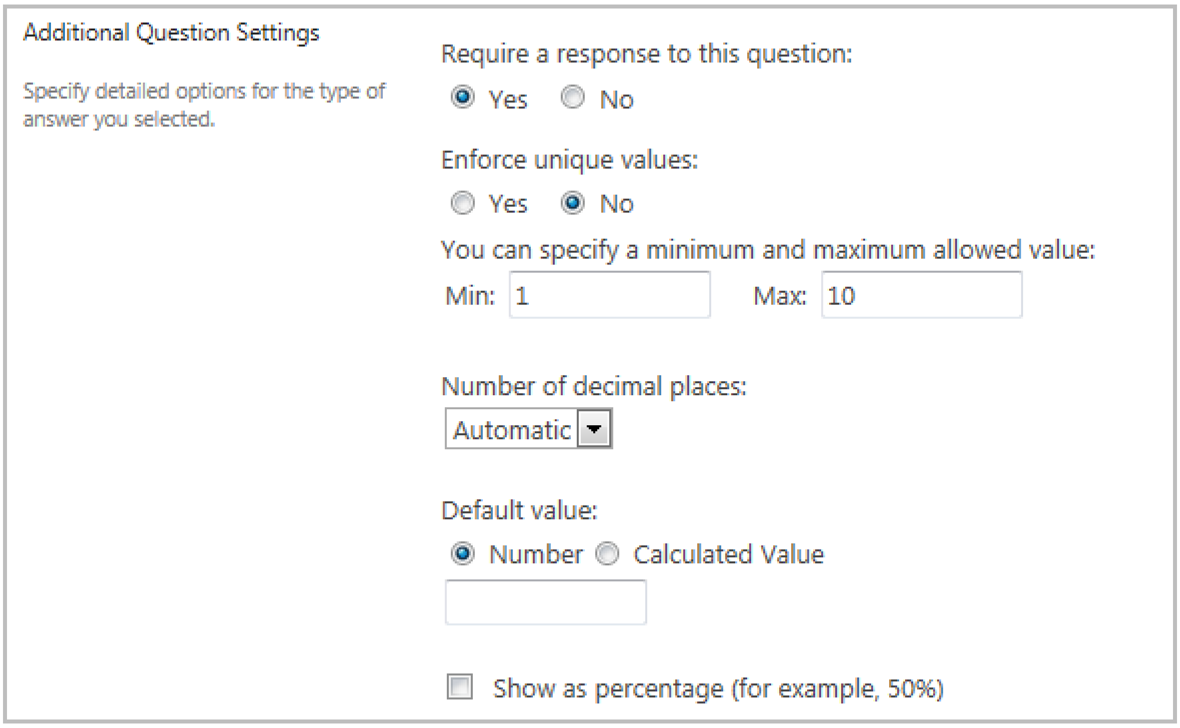


By default, the maximum number to be specified is 20.

- 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.

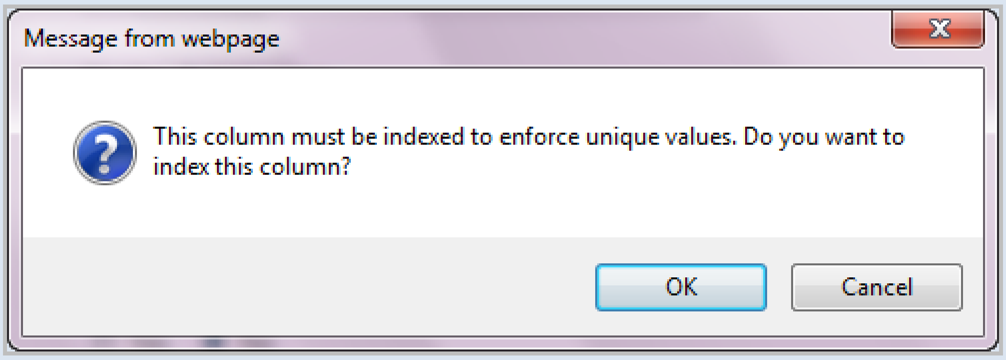
– Number;

Select this answer type if you want to specify the answer in numbers. Specify the additional settings filling in the form:



- 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.

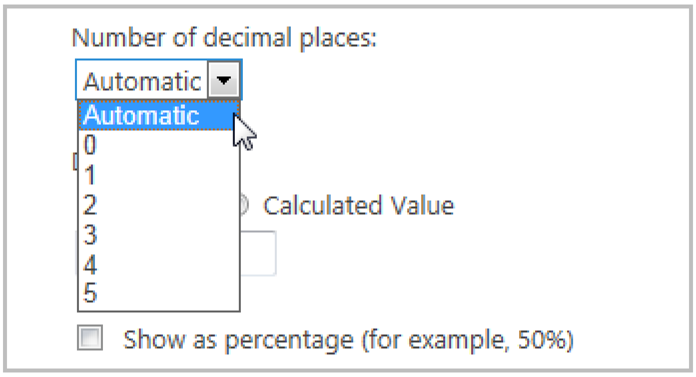
NOTE:	If you have checked the Enforce unique values option, once you want to click Finish to create the survey, the following dialogue will appear:



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;

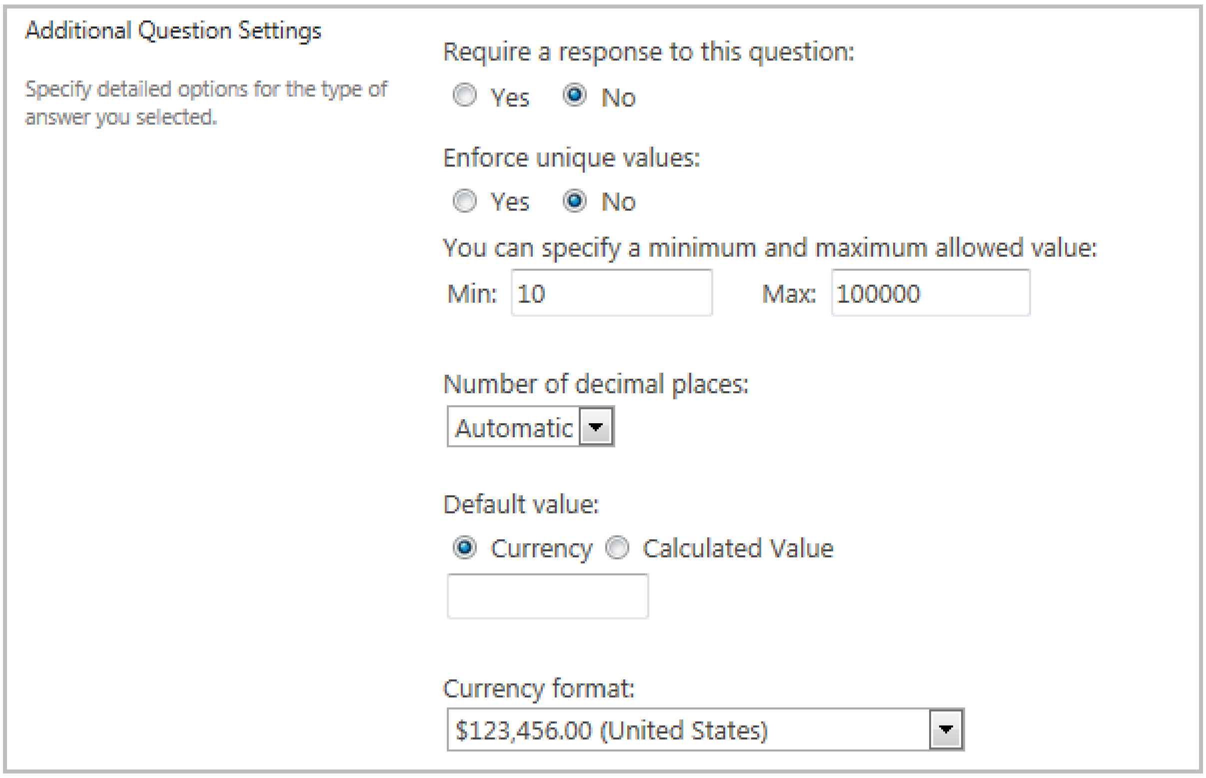
- Number of decimal places – set the number if decimal places by opening the drop-down by the name of the option:



  - 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;

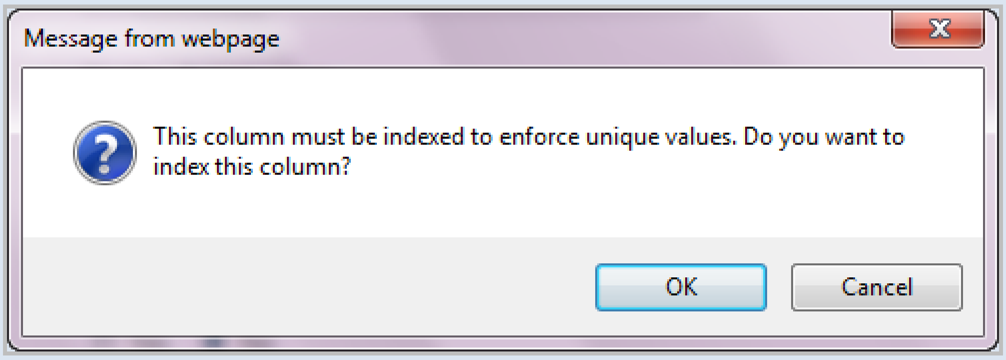
The answer presupposes mentioning some currency value. Specify the additional settings filling in the form:



- 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;

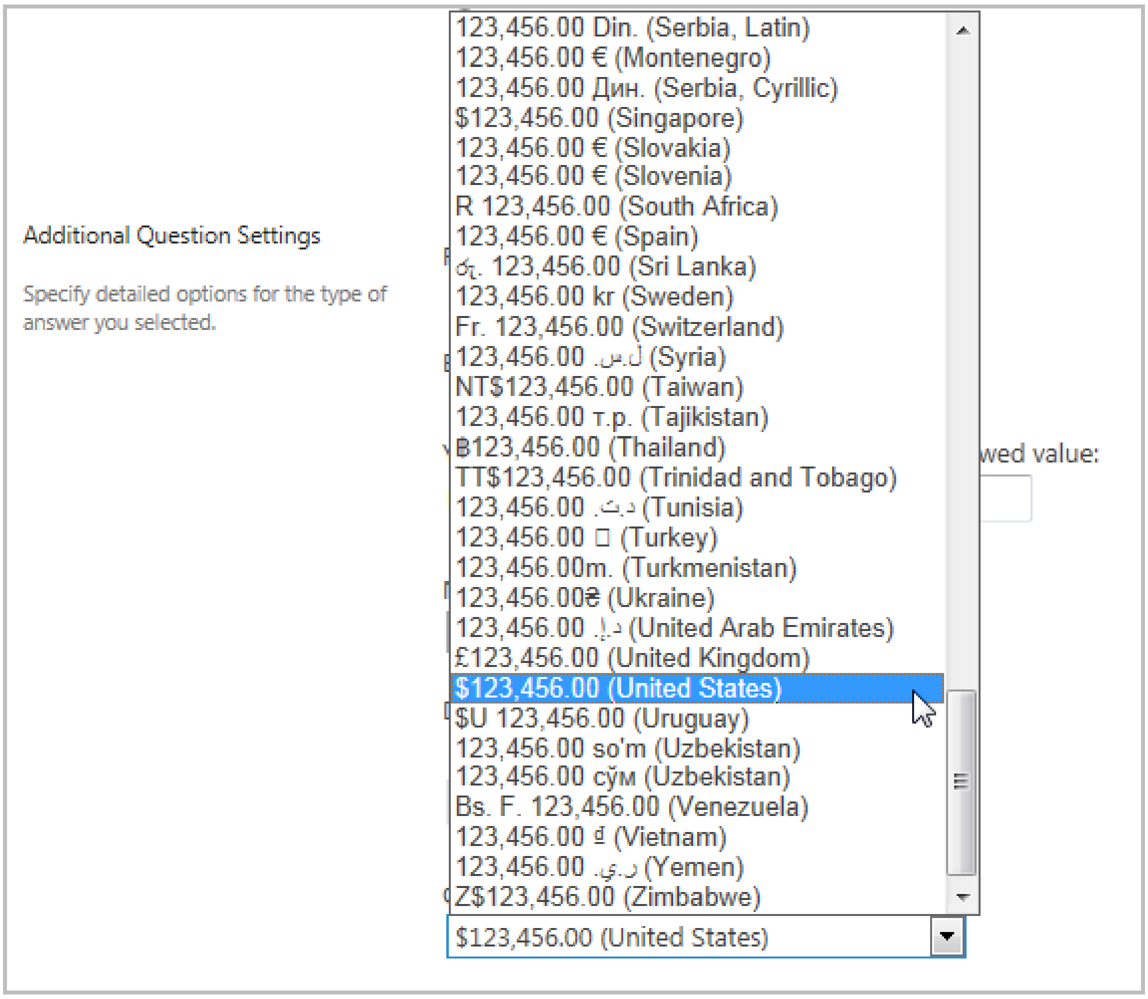
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once User 1 has given a certain answer, the answer has become unique and User 2 cannot give the same answer. The system will not take it.

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:



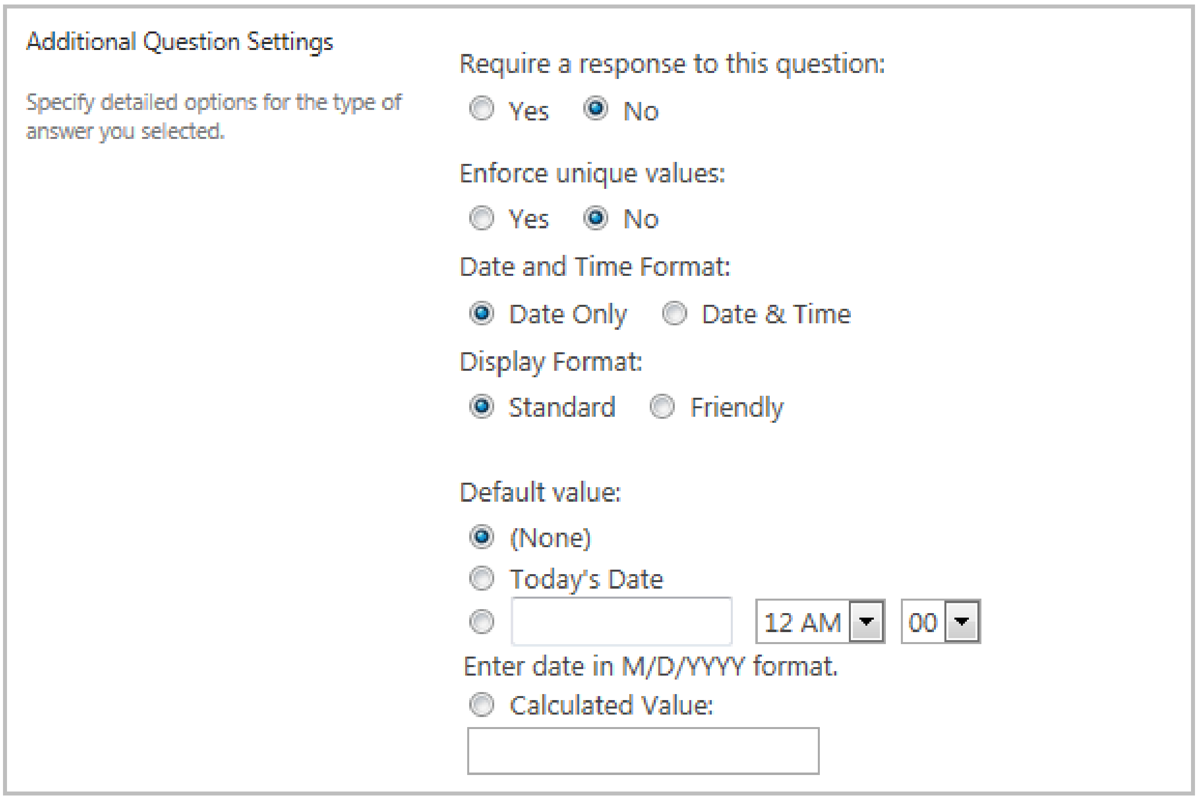
The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- 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 if 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:



– Date and Time;

The answer presupposes mentioning some time and date. 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

Date and Time Format:
Date Only Date & Time

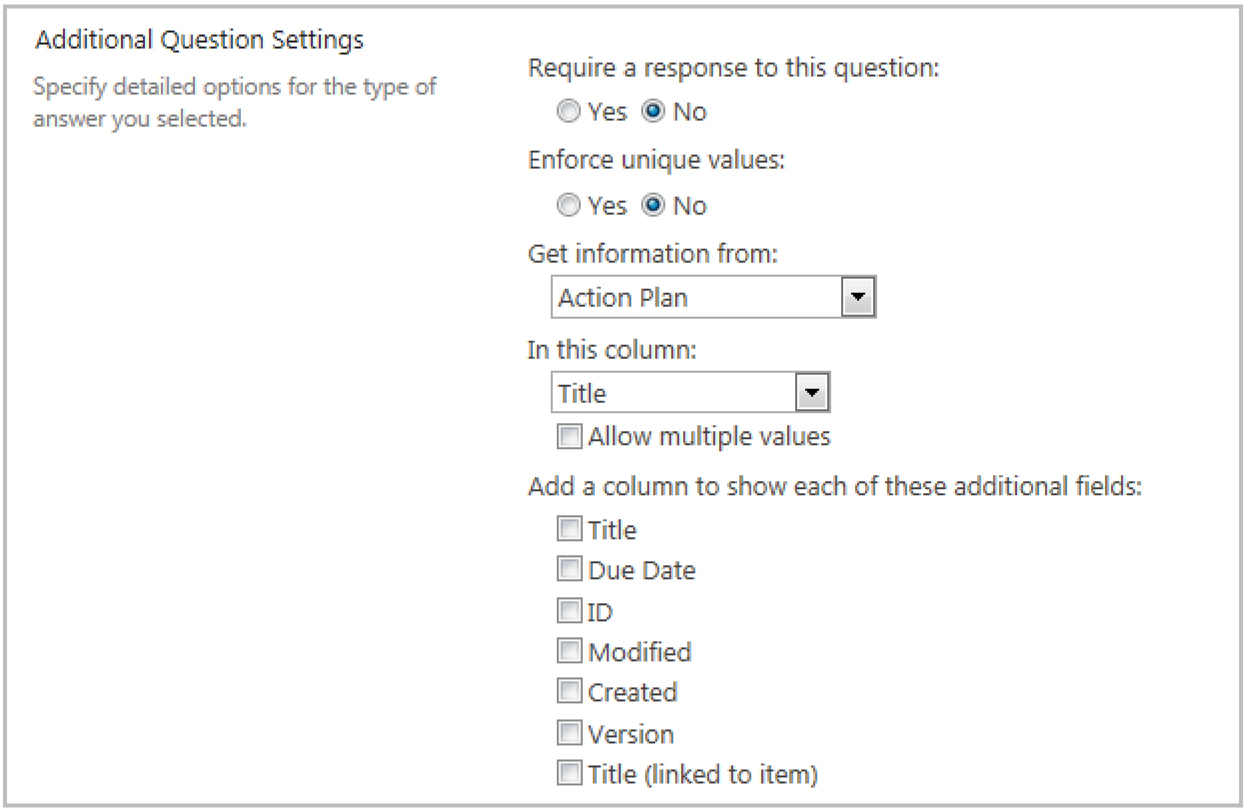
Display Format:
Standard Friendly

Default value:
(None)
Today's Date
12 AM 00
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.

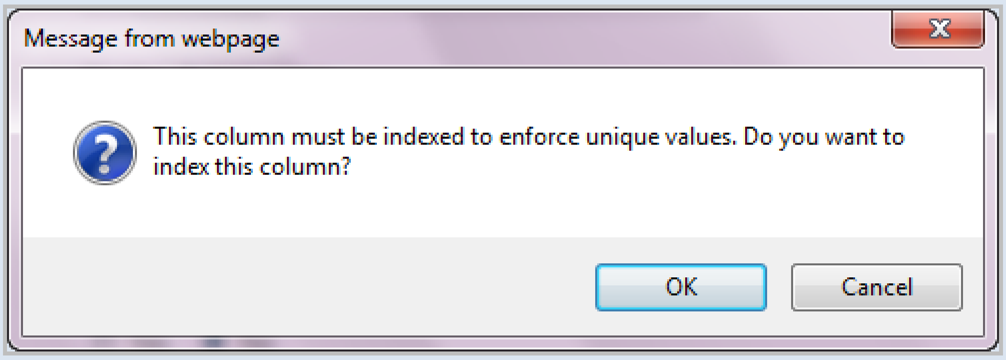
– Lookup (information already on this site);

The answer presupposes using some information from the site. Specify the additional settings filling in the form:



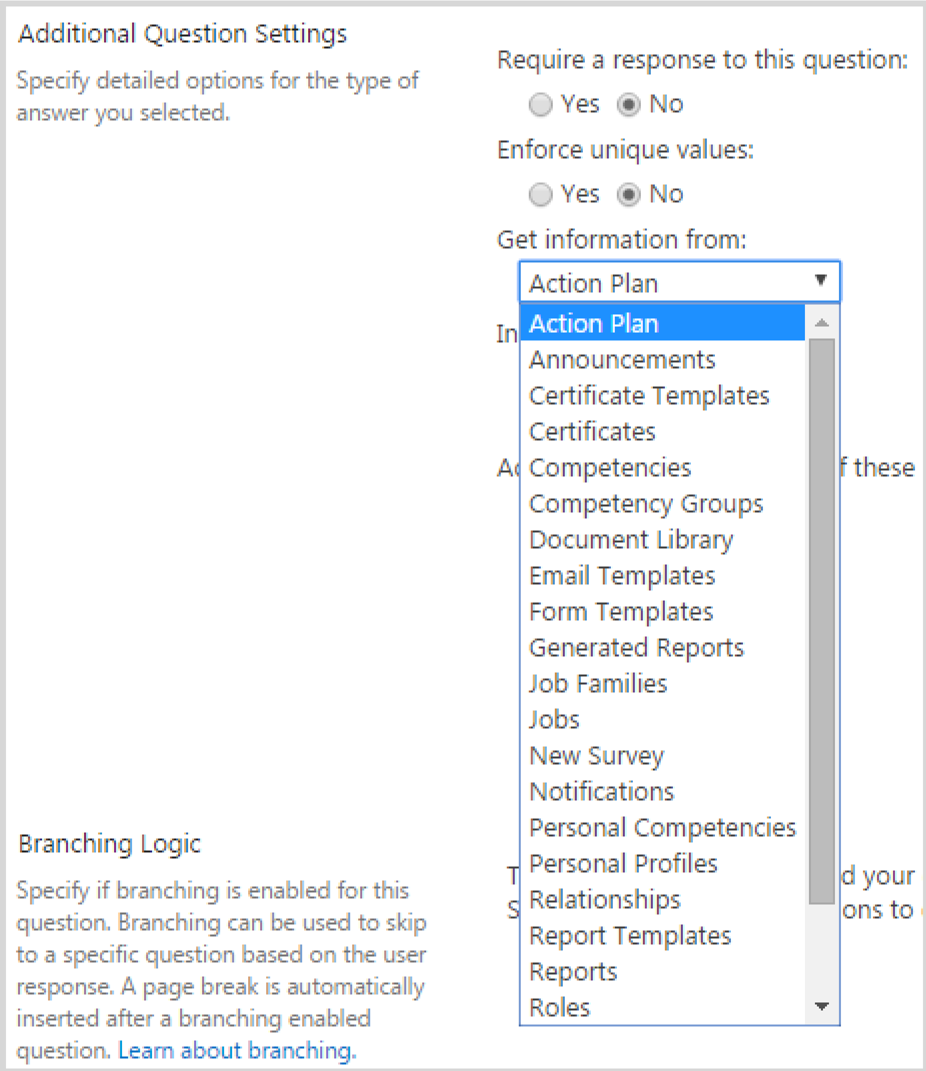
- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once 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:

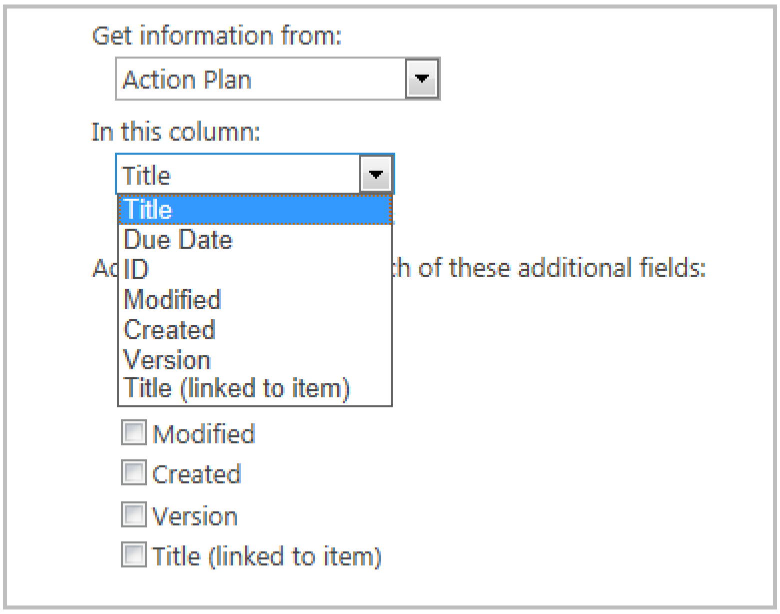


The user should index the column to enforce unique values. Click OK to index the column, click Cancel to omit the step.

- 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:



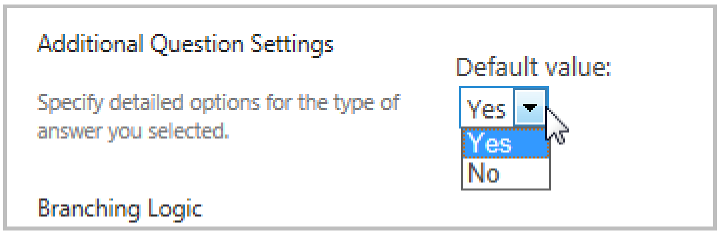
- In this column – specify what is in this column. To do that click the down arrow to open the drop-down menu:



- 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);

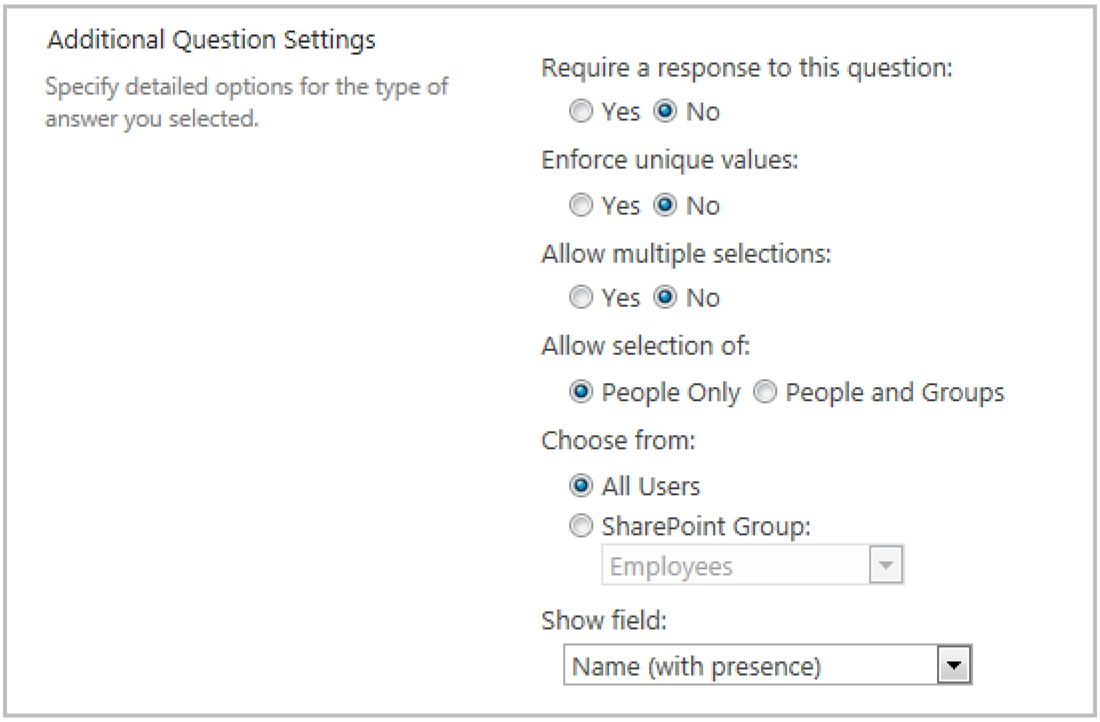
The answer presupposes a certain answer to the question: Yes or No. Specify the additional settings filling in the form:



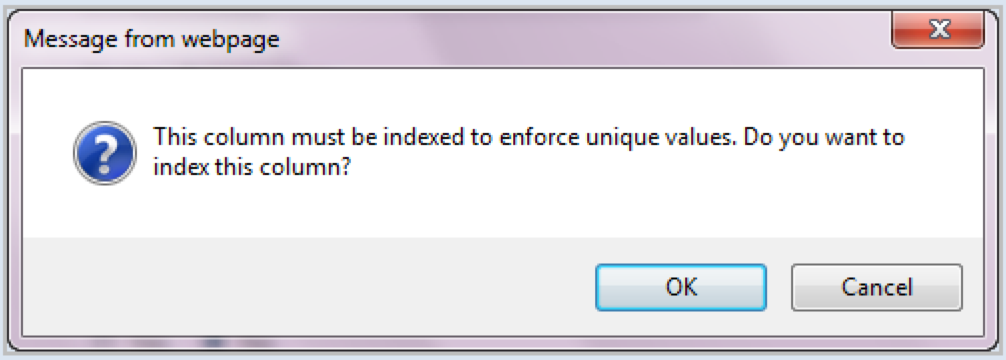
Click the down arrow to open the drop-down menu to specify the default value answer. Select Yes or No from the menu.

– Person or Group;

The answer presupposes selecting a certain name. Specify the additional settings filling in the form:

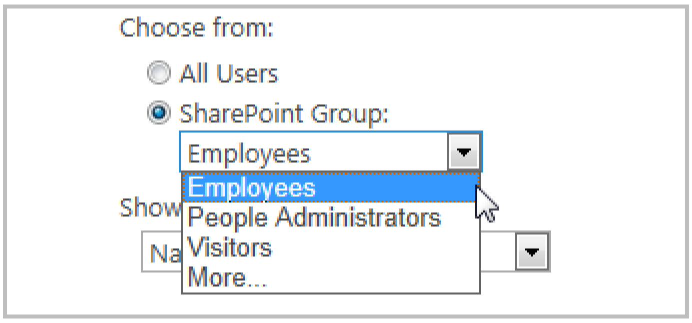


- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once 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;

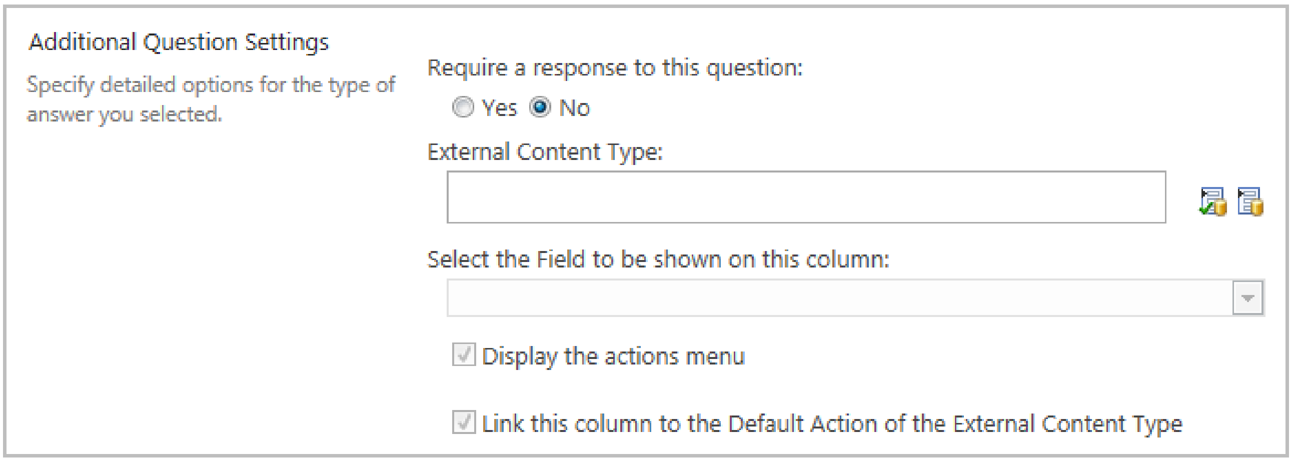
- Allow selection of – specify who you would like to allow selection of. You may choose either People Only or People and Groups. To do that, check the corresponding radio button. Once you have check the SharePoint Group radio button, specify a certain group you want to choose by clicking the down arrow below the SharePoint Group radio button:



  - Show field – open the drop-down menu to specify the field you want to show.

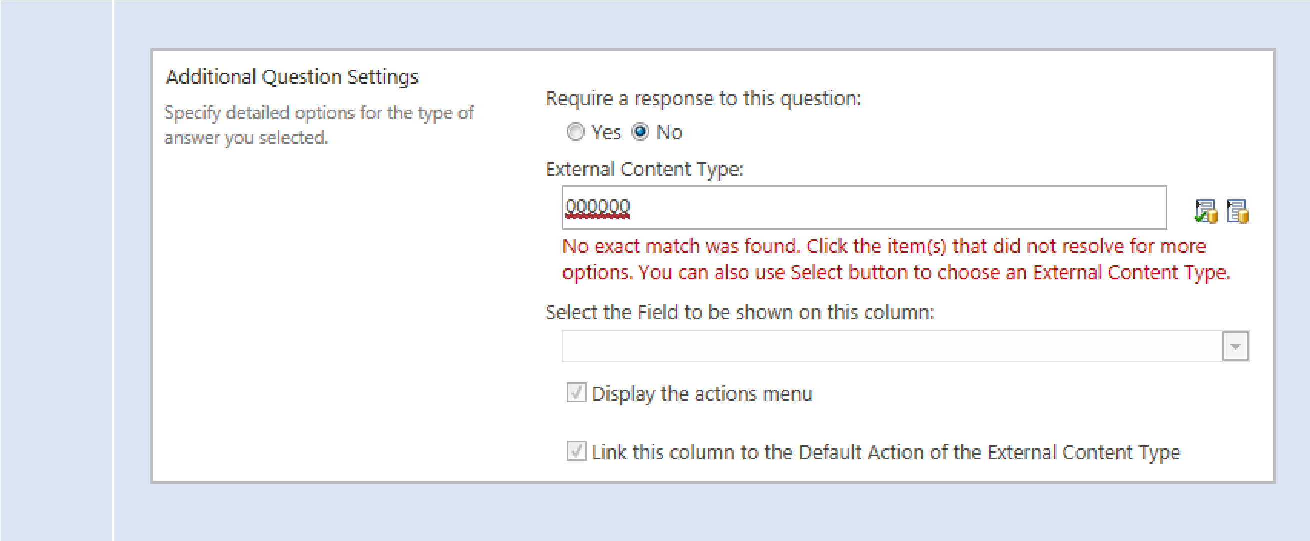
– External Data;

The answer presupposes selecting certain data. Specify the additional settings filling in the form:



  - 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:*



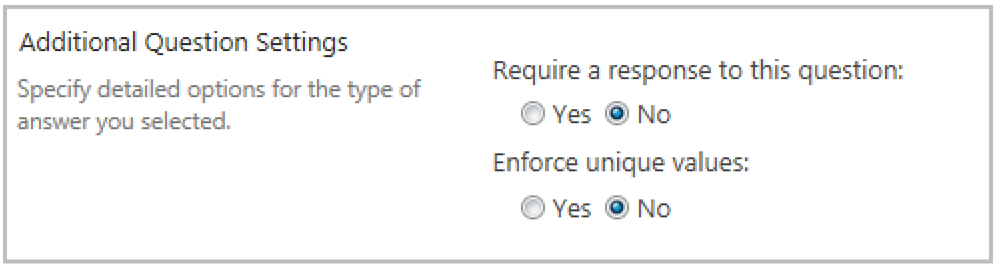
- Display the actions menu – select the check box if you want to display the actions menu;
- Link this column to the Default Action of the External Content Type – select the check box by the name of the option you want to link the column to the Default Action of the External Content Type.

– Introduction;

The considered type presupposes a detailed introduction to the answer. Specify the additional settings filling in the form:

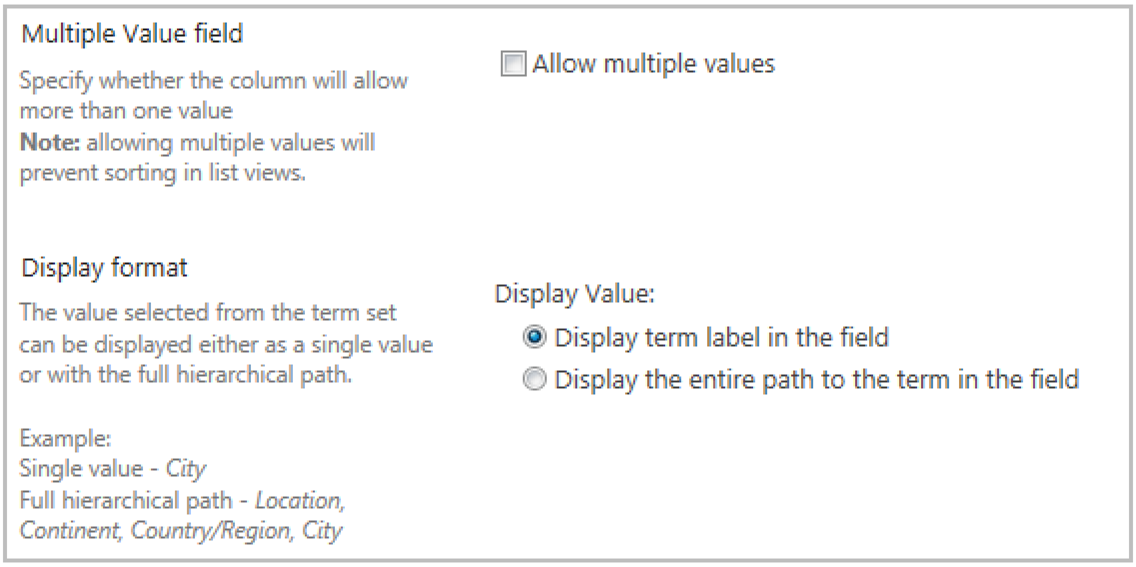
– Managed Metadata;

Specify the additional settings filling in the form:

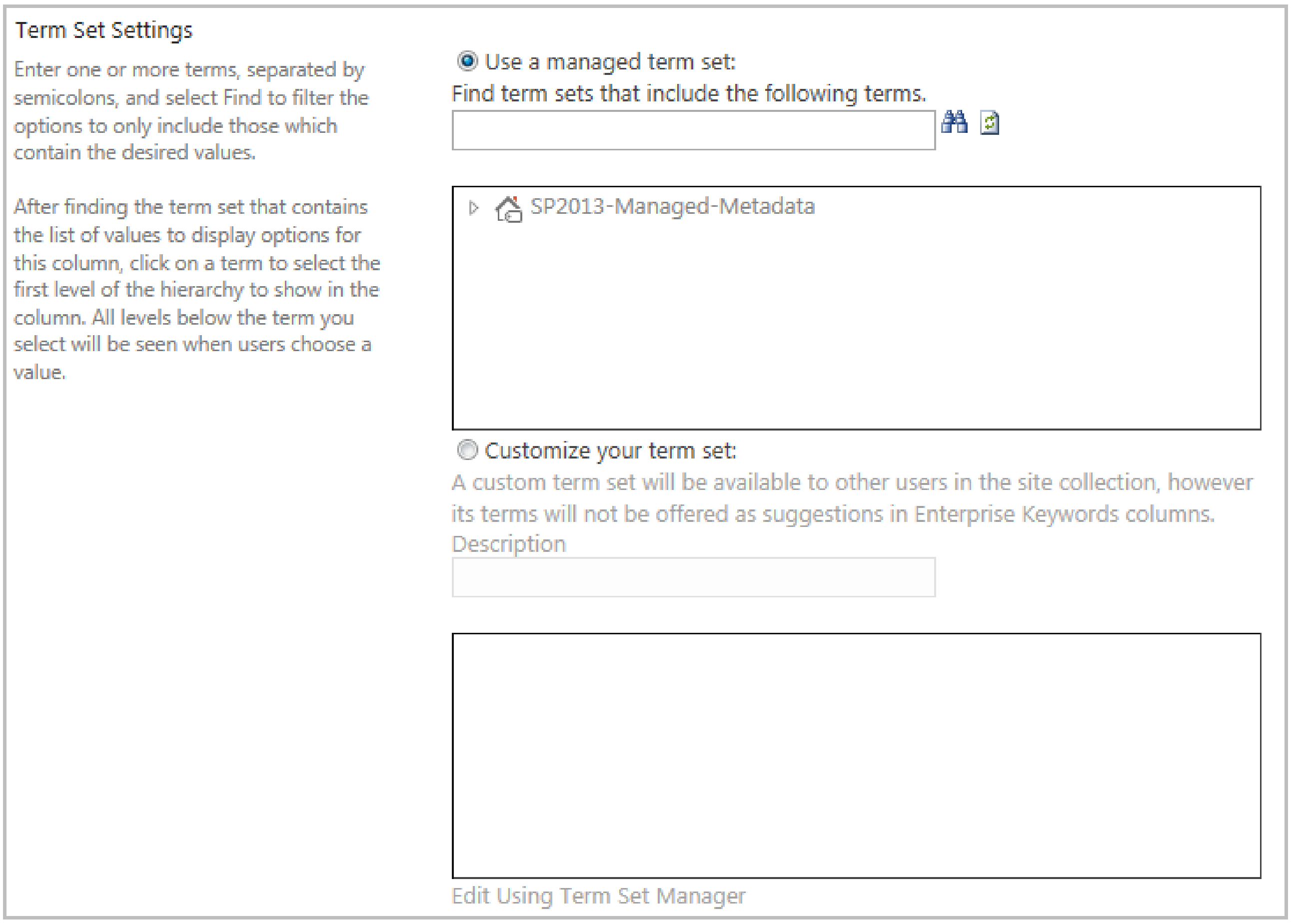


- Require a response to this question – specify whether the response to the question is obligatory. Select Yes if the response is needed, select No if it is optional;
- Enforce unique values - specify whether you want to set a unique meaning for each answer. The considered option in use means that once 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:



- 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.

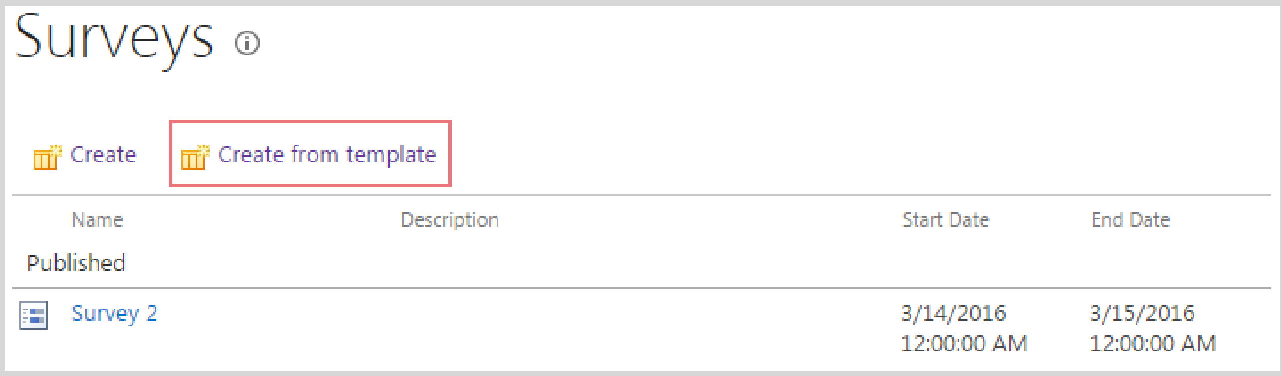
After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.

1) Click Next Question to specify the next question OR click Finish to finish creating the Survey OR Cancel to cancel the Survey creation.

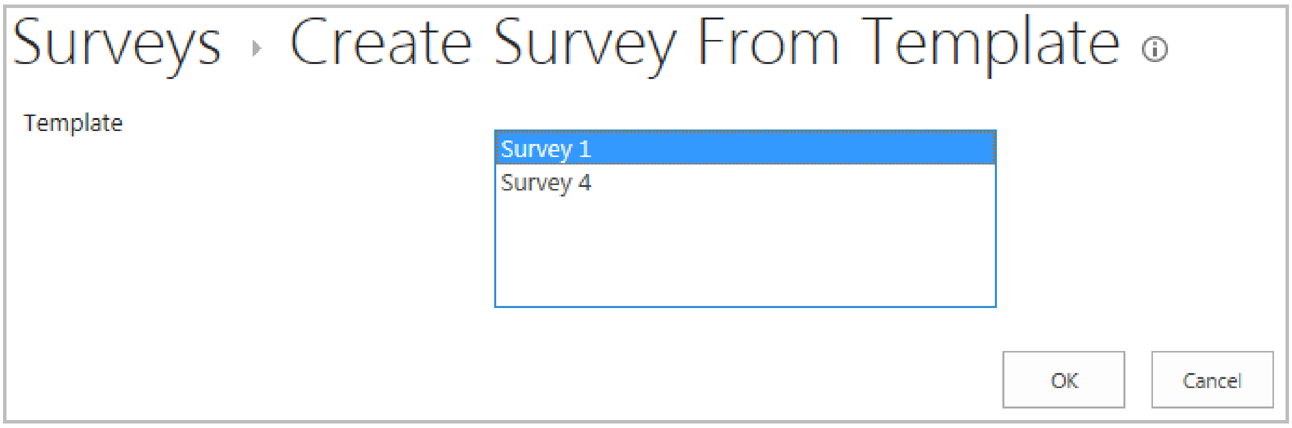
8.1.2 Create Template-based Survey

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:



3) Click Create from template button. Once you have done it, the following form will appear:



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:

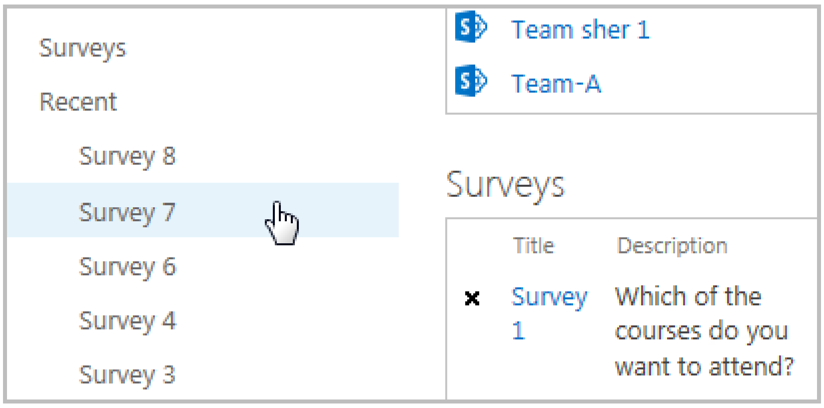
– Name and Description – specify the name of the survey as you want it to appear in headings and links throughout the site. Fill in Description field;

6) Click Create to finish the process of Survey creating. Click Cancel to omit the changes.

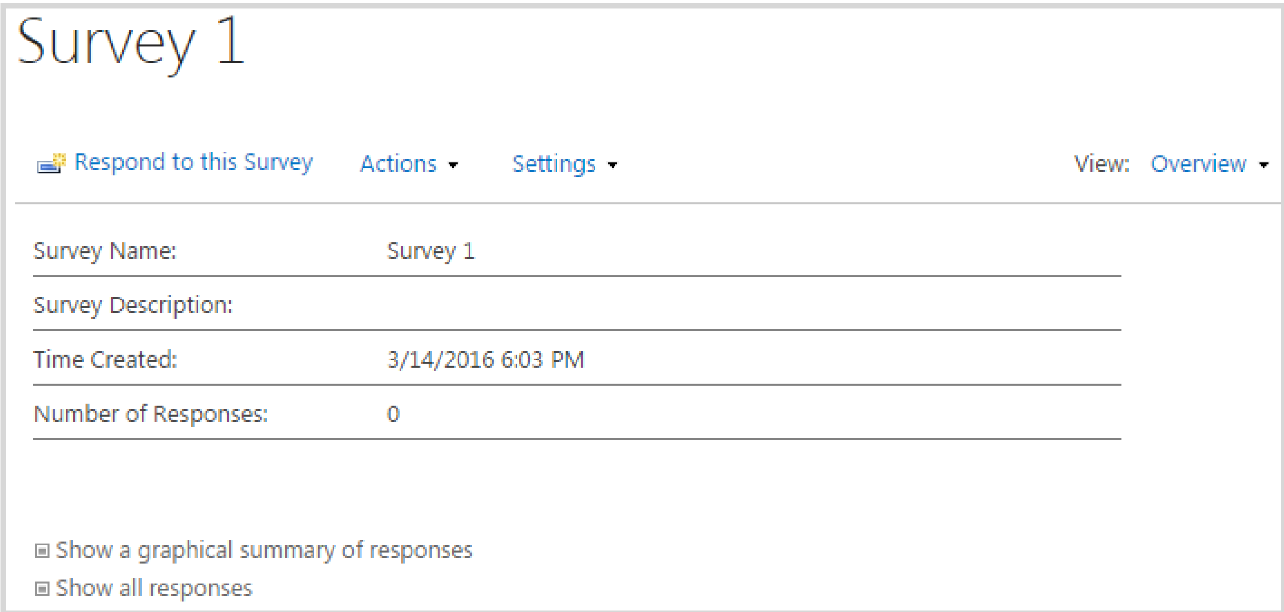
8.2 Add Question to Survey

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:

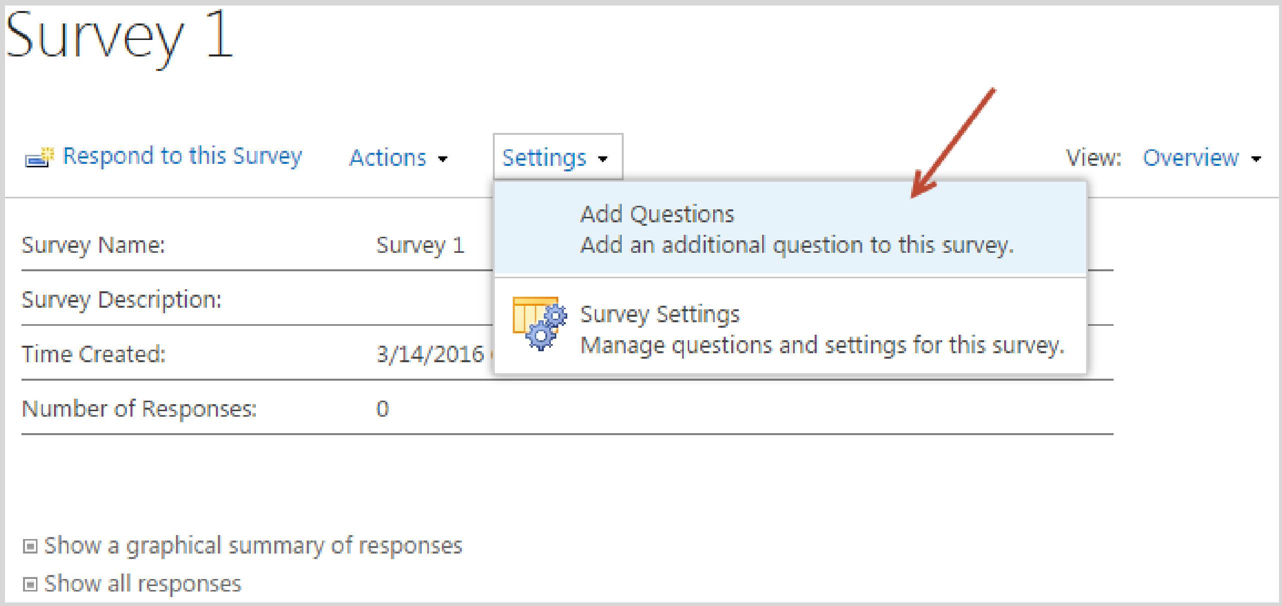
1) On the host home page, click the survey link on the left side bar to overview the survey information:



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:



4) You will the Survey Question form. Fill in the form following the directions covered in [section Creating Surveys](#).

8.3 Manage Survey

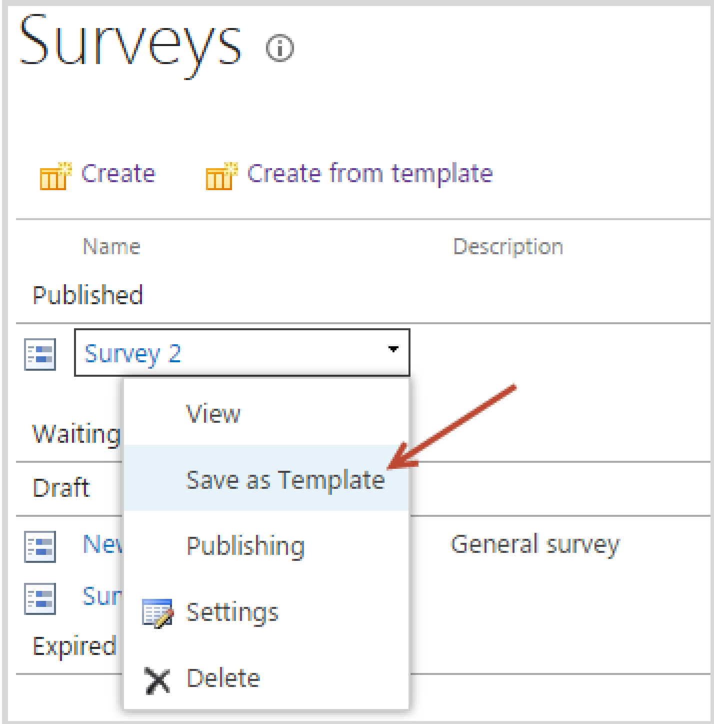
The process of managing SharePoint CCM Surveys is many formed and gives the users a wide range of possibilities to work with the Survey items. The user can:

- Save the Surveys as Templates;
- Enable publishing;
- Change the Survey settings;
- Delete the chosen Survey.

8.3.1 Saving Surveys as Templates

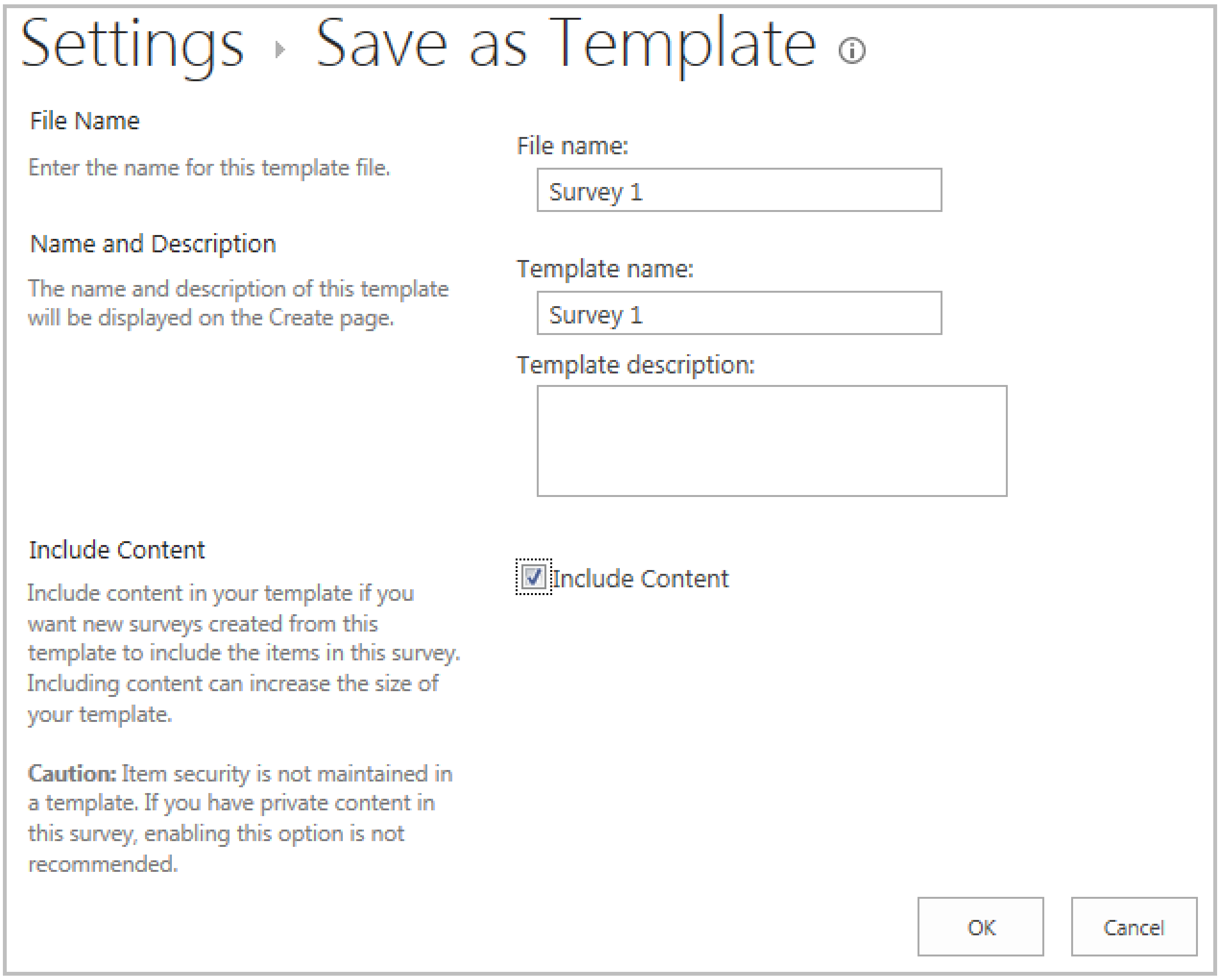
To Survey as a template, follow the steps given below:

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:

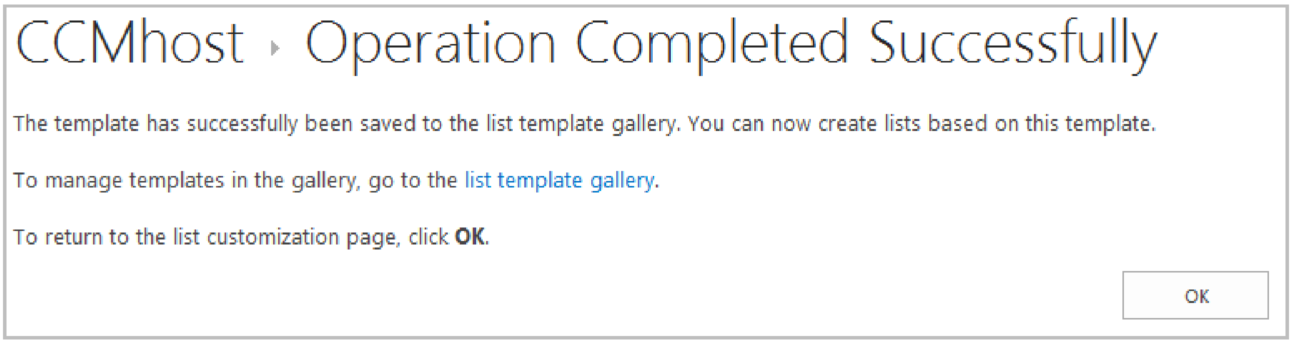


3) Select Save as Template from the drop-down;
4) Fill in the open form to save the Survey as a template:
   – File Name – enter the name for the template file;
   – Name and Description – enter the Template name and Template description. The name and description of this template will be displayed on 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.



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:



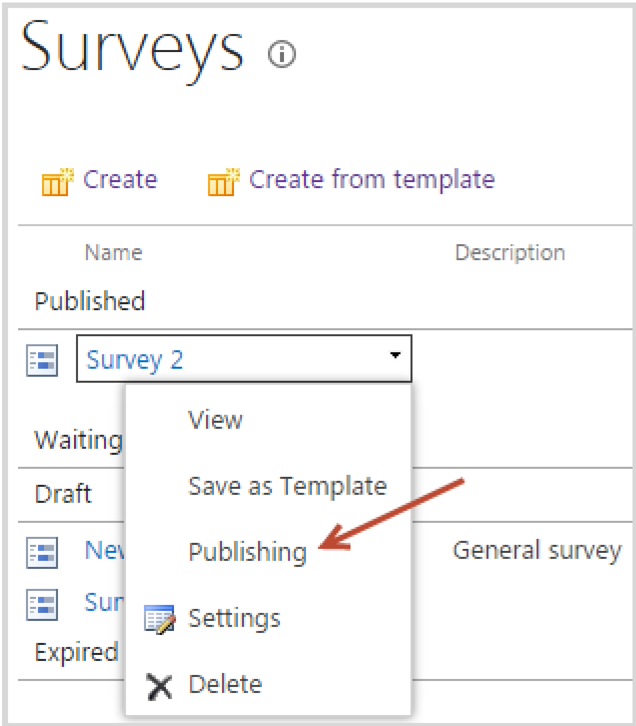
3) Click list template gallery link to manage the templates OR click OK to return to the list customization page.

8.3.2 Publishing Surveys

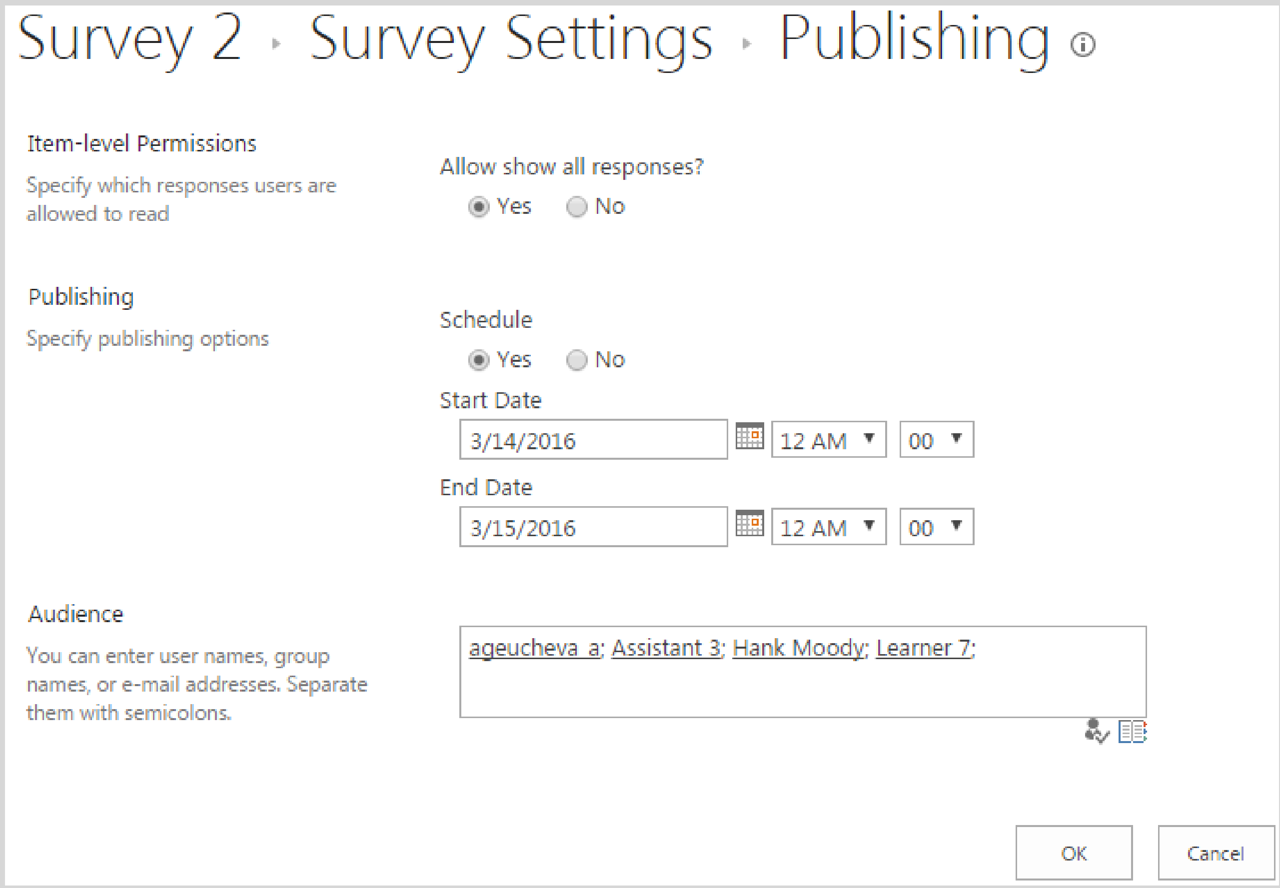
To publish a survey, do the following:

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:



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.

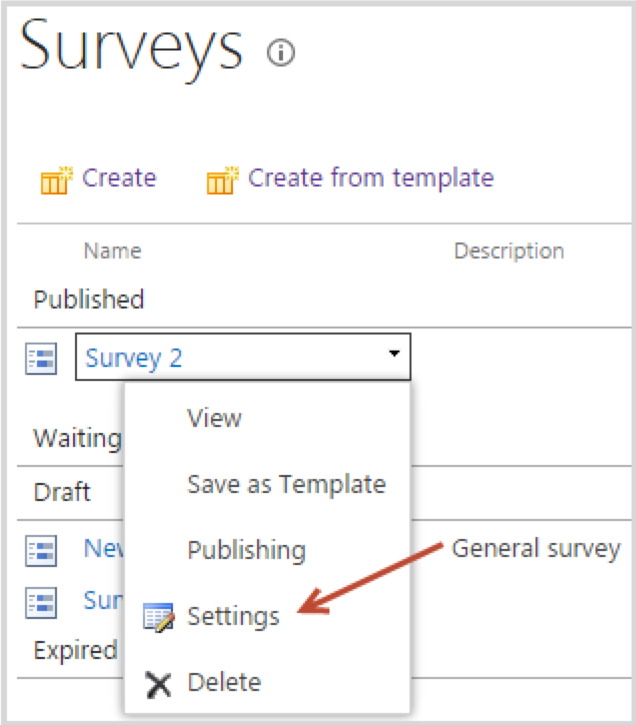
8.3.3 Managing Survey Settings

To manage the Survey settings, you should navigate to the Survey Information List. You can do it in two ways:

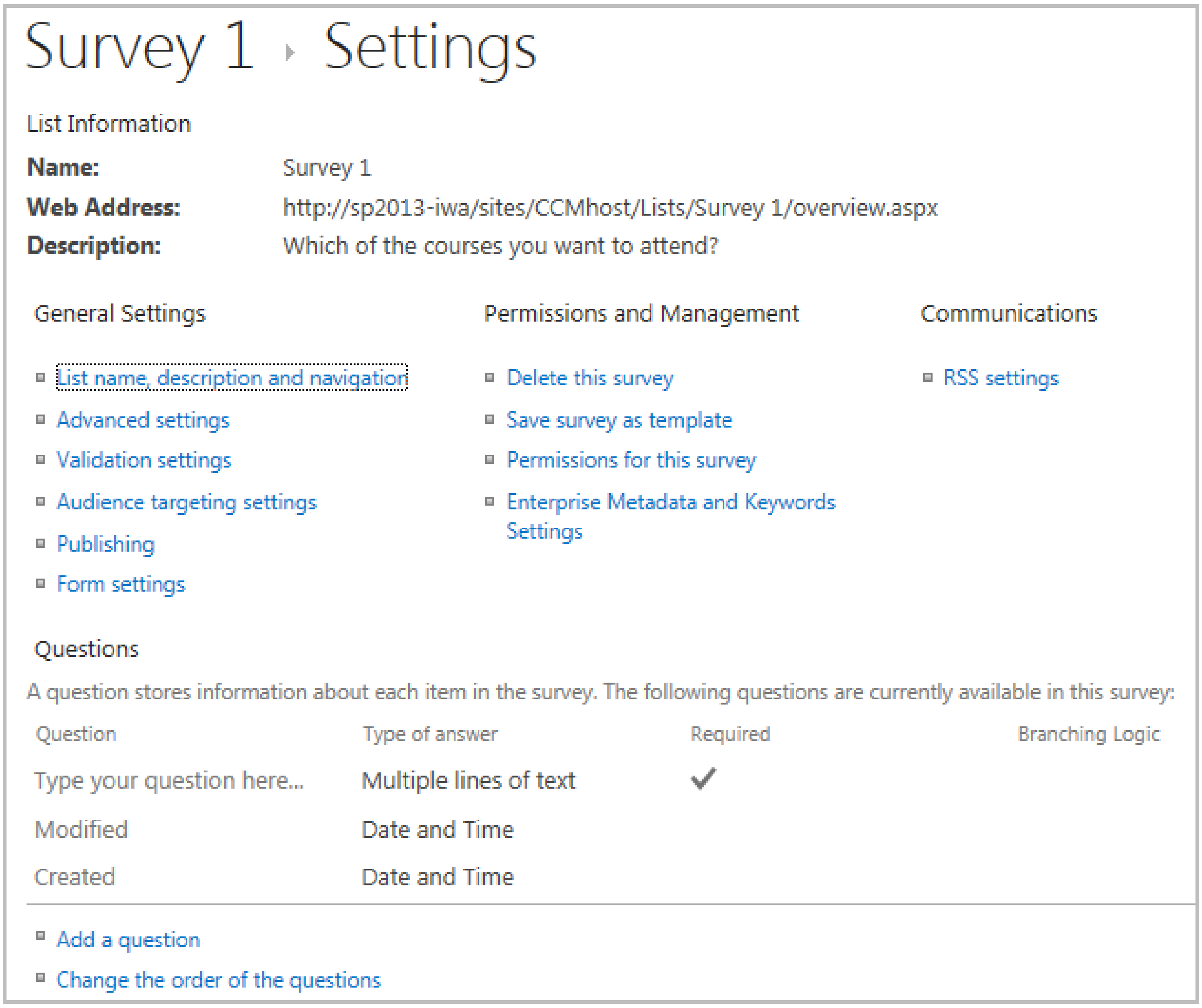
I. To navigate the Survey Information List, follow the steps given below:

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:

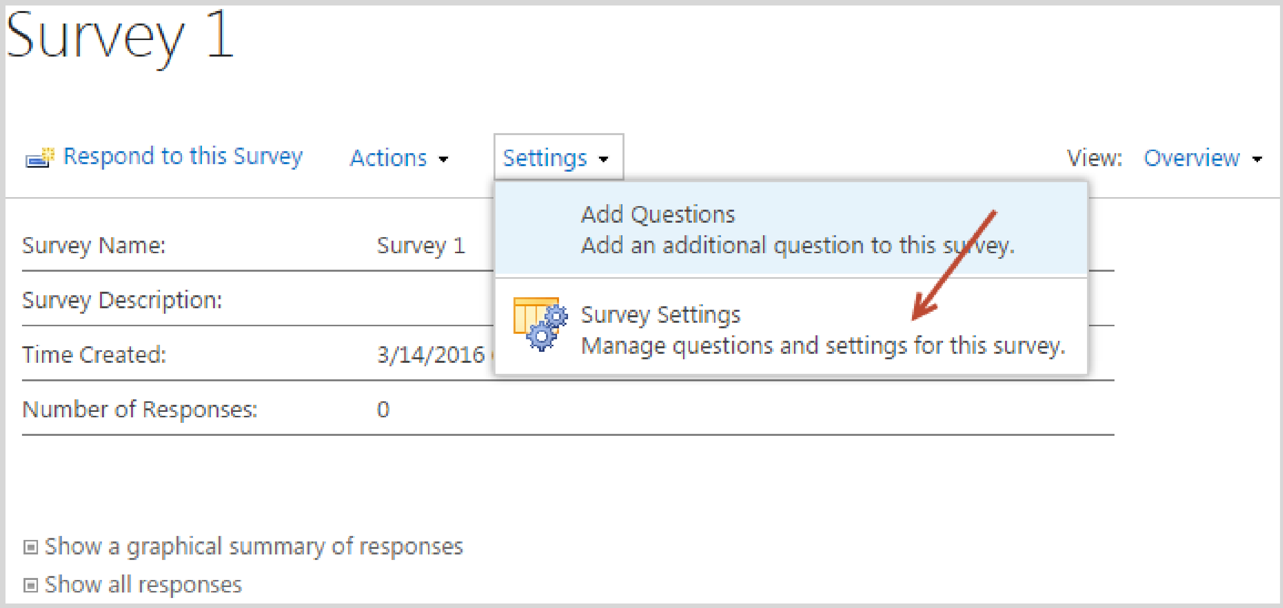


2) Select Settings. Once you have done it, you will be redirected to the Survey Information List:



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:

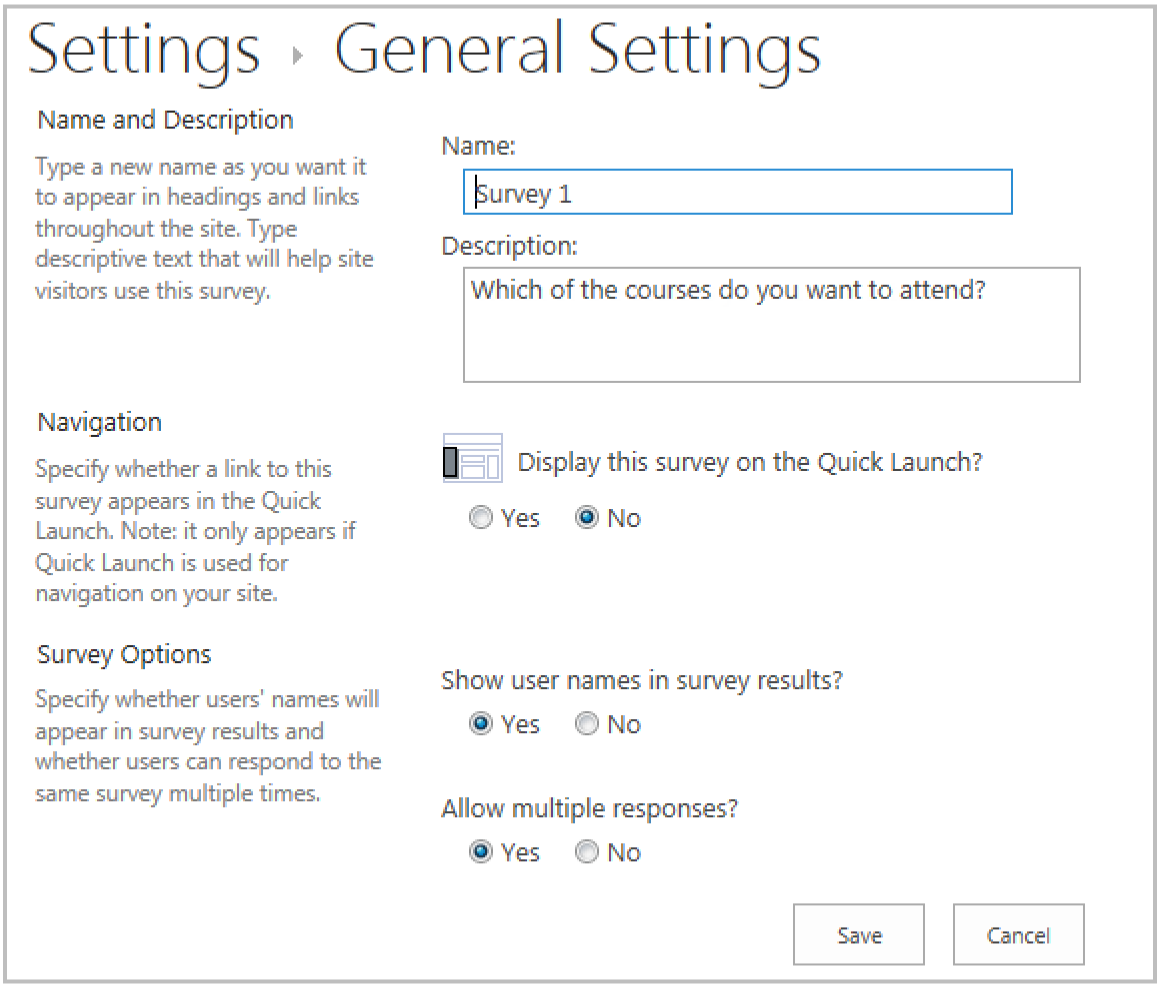


3) Click Survey Setting to navigate to the Survey Information List.

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:

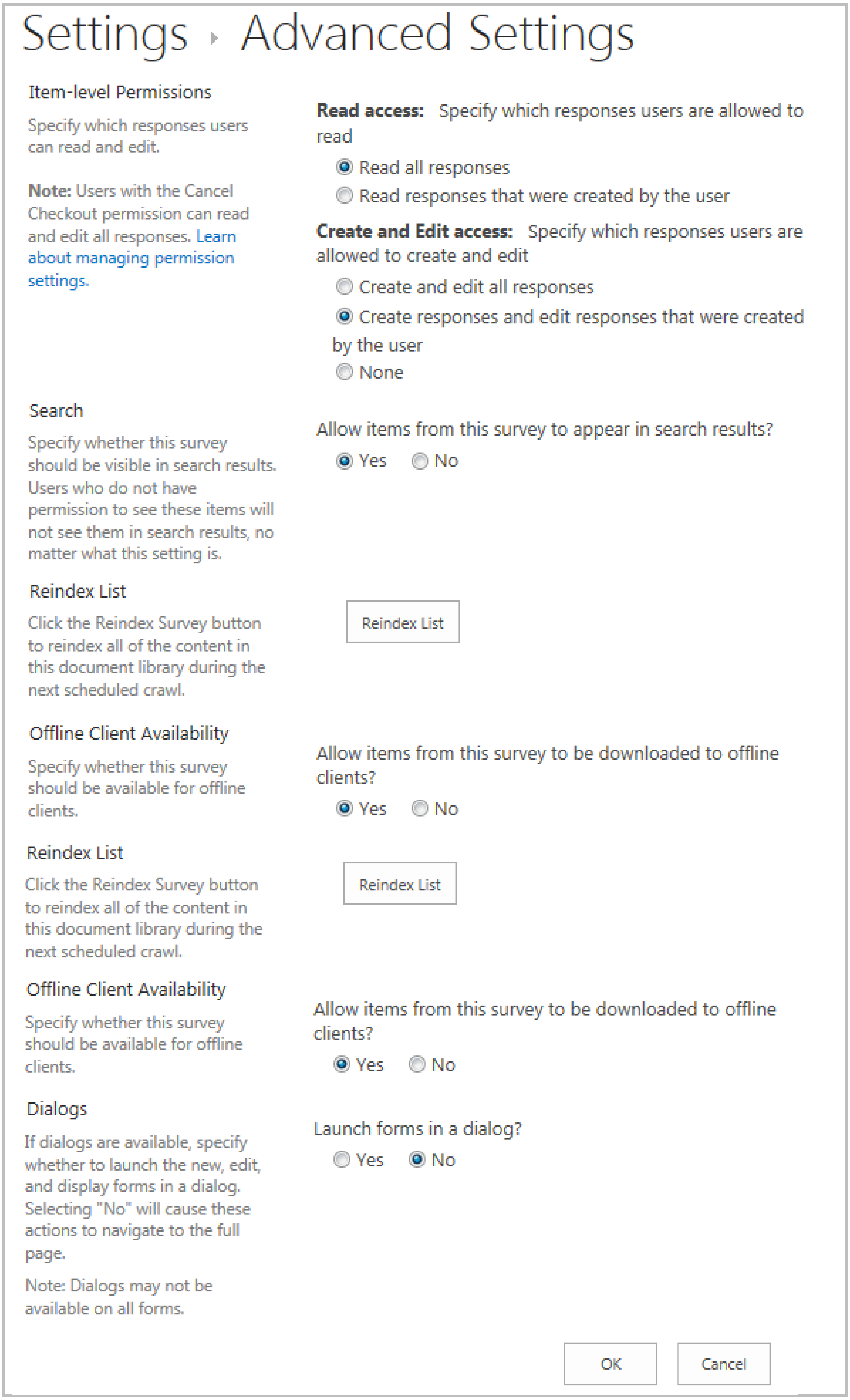


- Name and Description – type the new name as you want it to appear in headings and links throughout the site;
- Navigation – specify whether the link to the survey will appear in the Quick Launch. Select Yes, if you want the link to appear in the Quick Launch section; Select No, you do not want the 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.
Note: Dialogs may not be available on all forms.
Launch forms in a dialog?
Yes No
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;

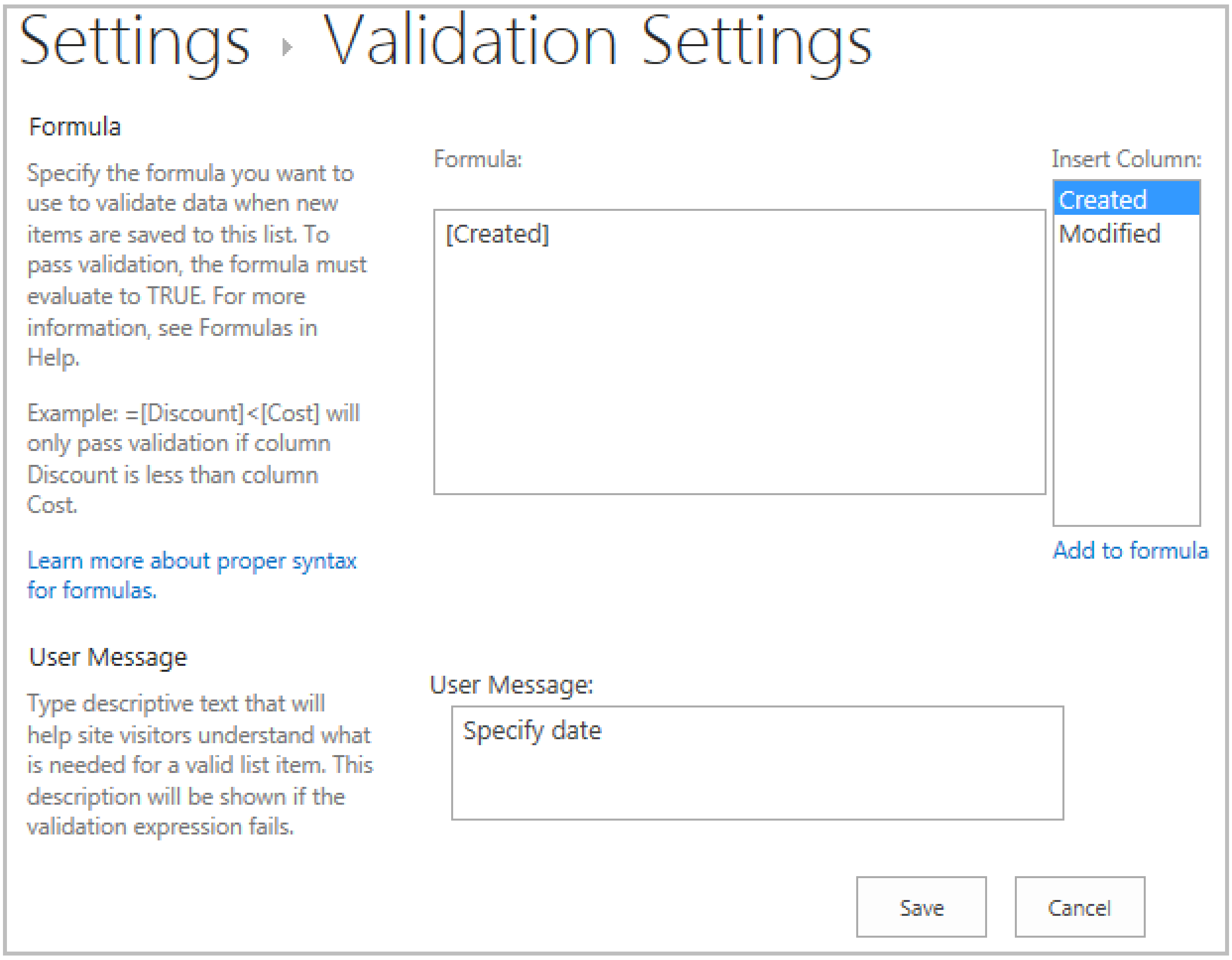
NOTE:	The users who do not have permission to see these items will not see them in search results, no matter what this setting is.

– 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 down loaded 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:



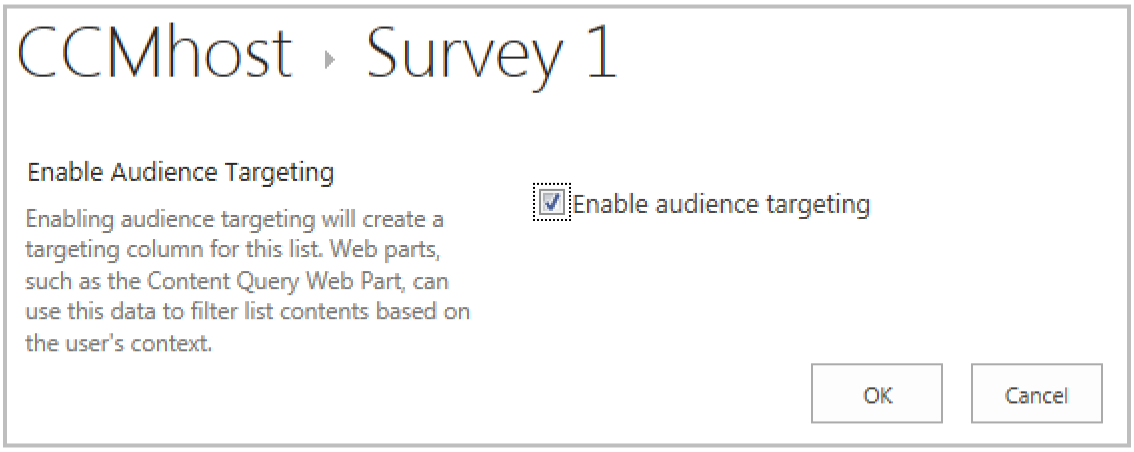
– Formula - specify the formula you want to use to validate the data in this column when new items are saved to this list. Fill in the Formula: field specifying the formula and choose the column to insert in the Insert Column: section. Click Add to formula link to add the chosen column to insert to the 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.

❖ <u>Audience targeting settings</u> – the option under consideration is intended to enable audience targeting. Once you click the Audience targeting settings link, the following form will appear:

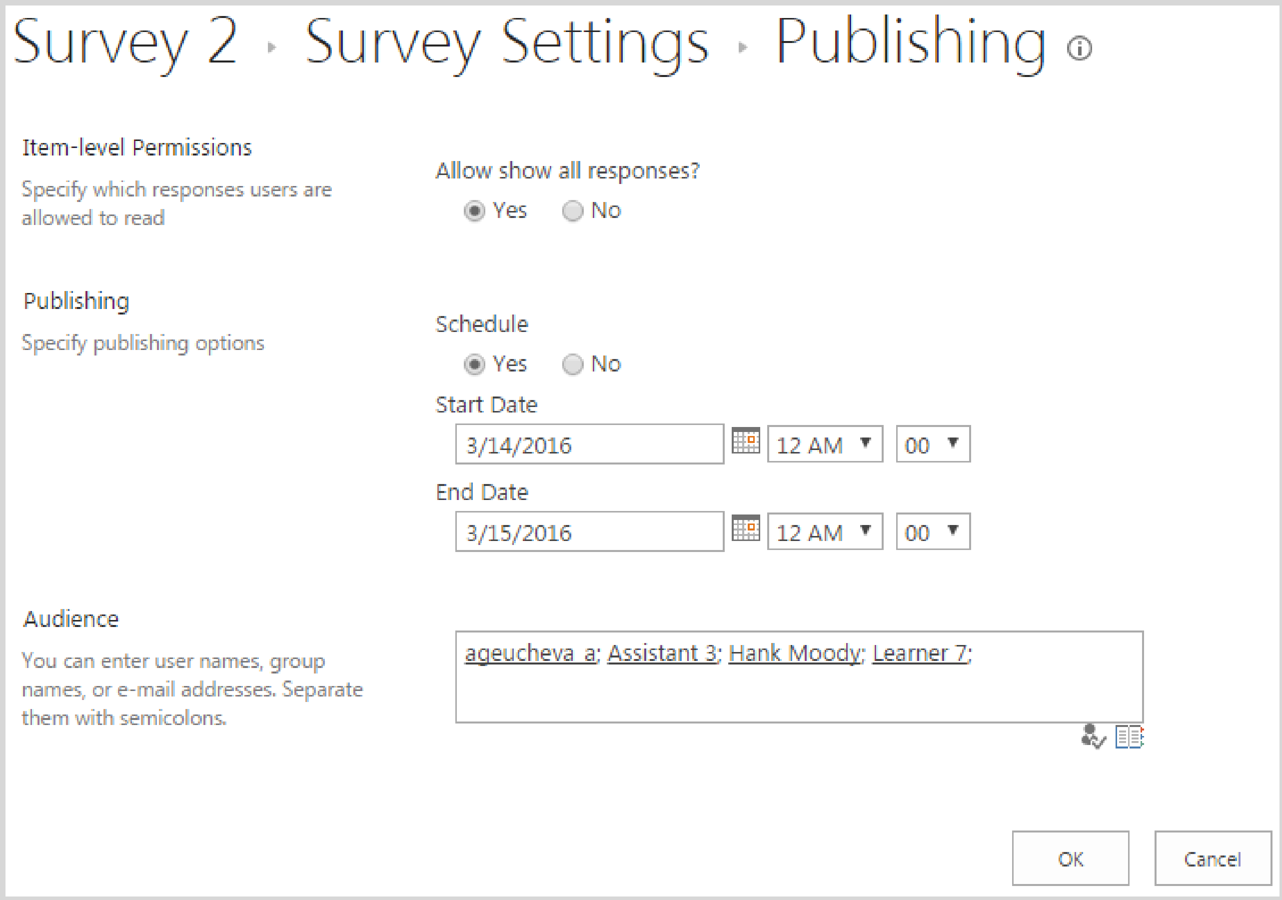


Enable Audience Targeting section is used to create a targeting column for the list. Web parts can use the data to filter list contents based on the user's contexts. Select Enable audience targeting check box to enable the corresponding option.

Click OK to save changes <u>OR</u> click Cancel to abandon the changes.

❖ <u>Publishing</u> – the settings are implemented to change and enable the Survey publishing settings.

Once you click the Publishing link, the following form will appear:

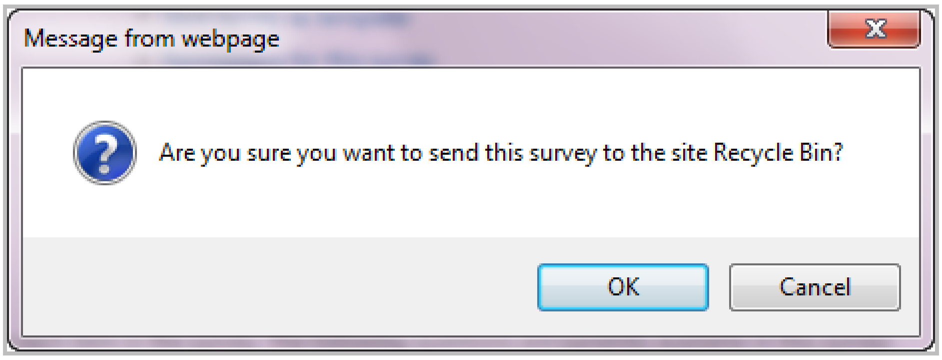


Fill in the form following the prescriptions given below:

- 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.

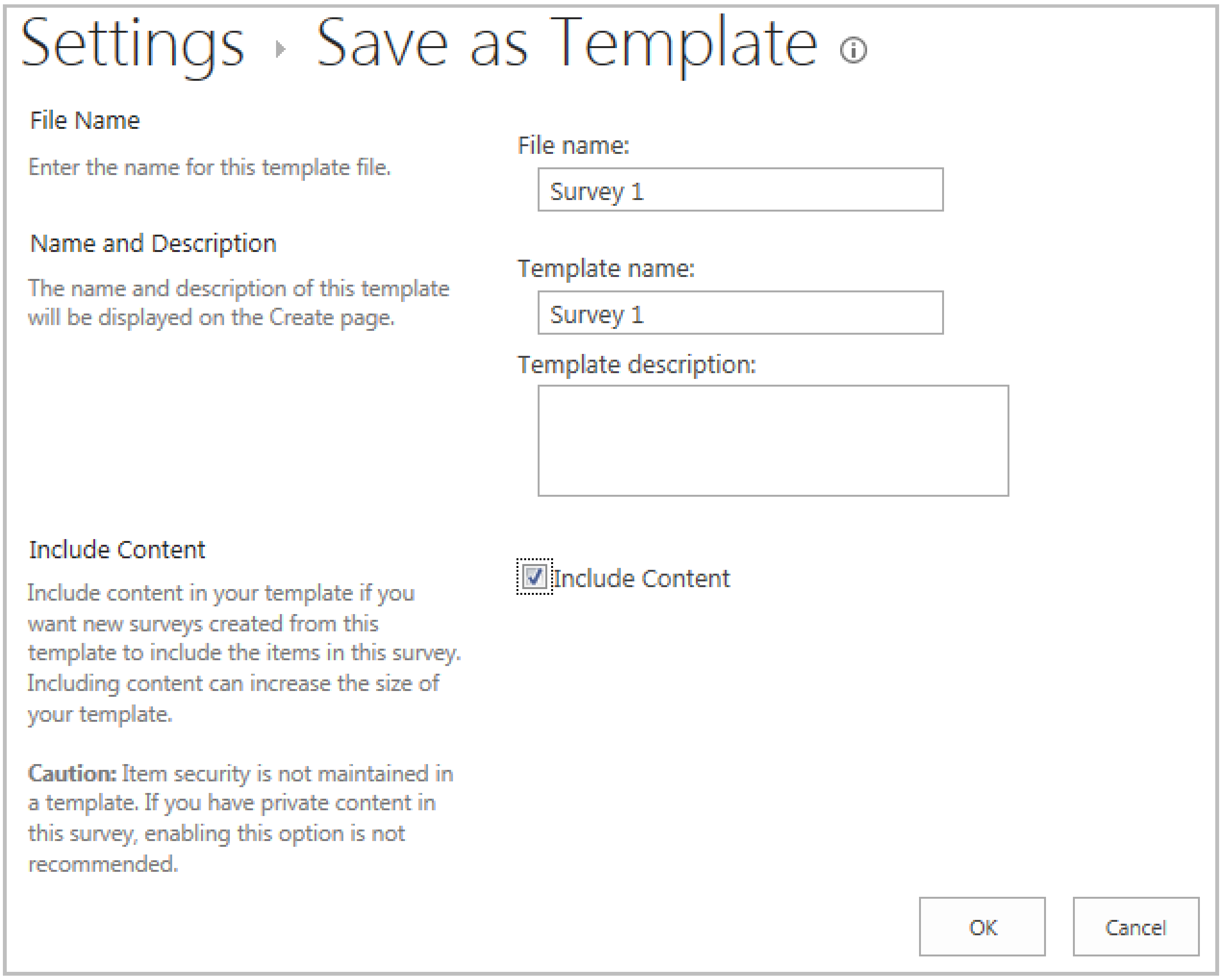
Click OK to save changes <u>OR</u> click Cancel to abandon the changes.

2) Permissions and Management;
   - <u>Delete this survey</u> - 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 <u>OR</u> click Cancel to abandon the step of the Survey deletion.

- <u>Save survey as a template</u> – 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:



Fill in the open form to save the Survey as a template:

– File Name – enter the name for the template file;

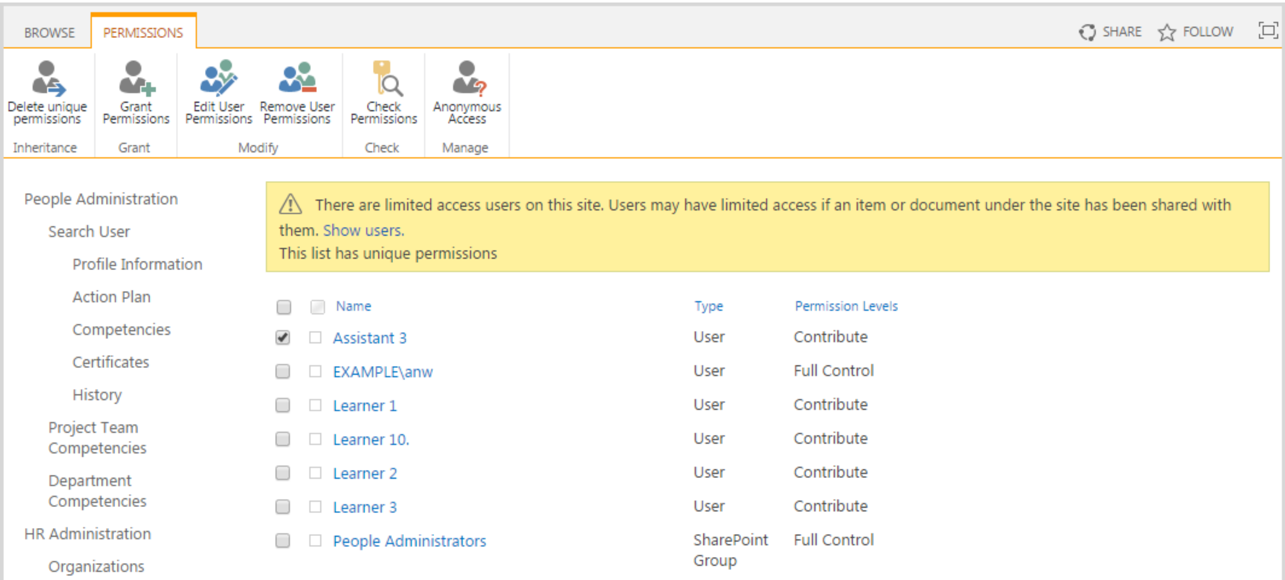
– Name and Description – enter the Template name and Template description. The name and description of this template will be displayed on the Create page.

– 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.

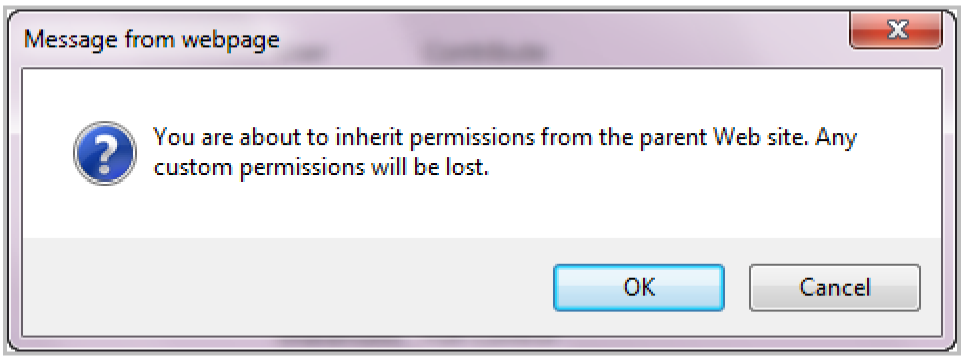
NOTE:	Item security is not maintained in a template. If you have private content in this survey, enabling this option is not recommended.

Click OK to save changes <u>OR</u> 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:

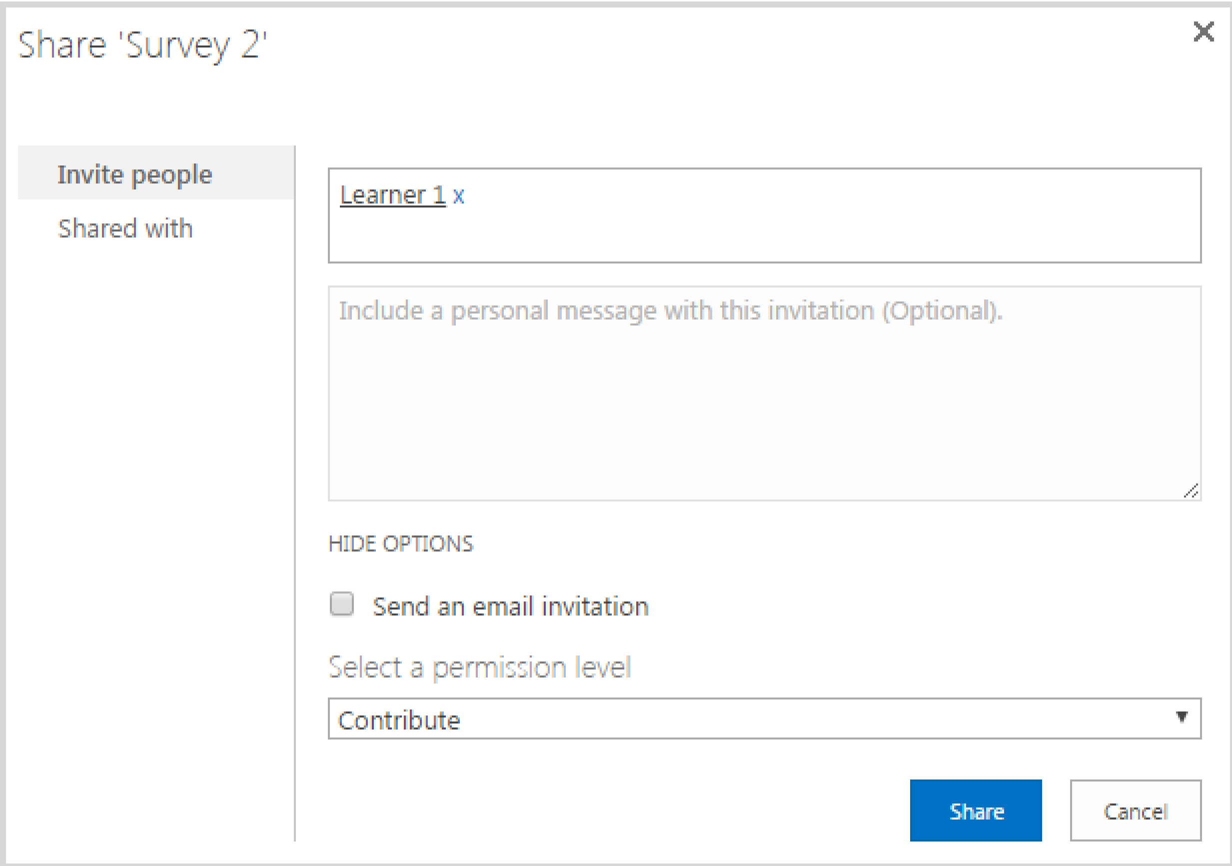


To inherit permission from the Parent web site, click the Delete Unique Permissions button on the ribbon. The following dialogue box will appear, notifying that "You are about to inherit permissions from the parent Web site. Any custom permission will be lost":



Click OK to proceed <u>OR</u> 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;
    - 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;
    - 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.