EmployeeConnect
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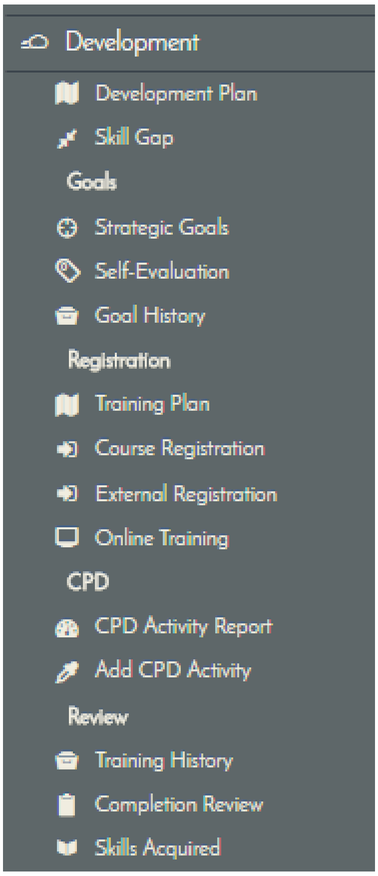
Development Module Manual

A manual designed to help individuals use the Development Module

Employee Overview

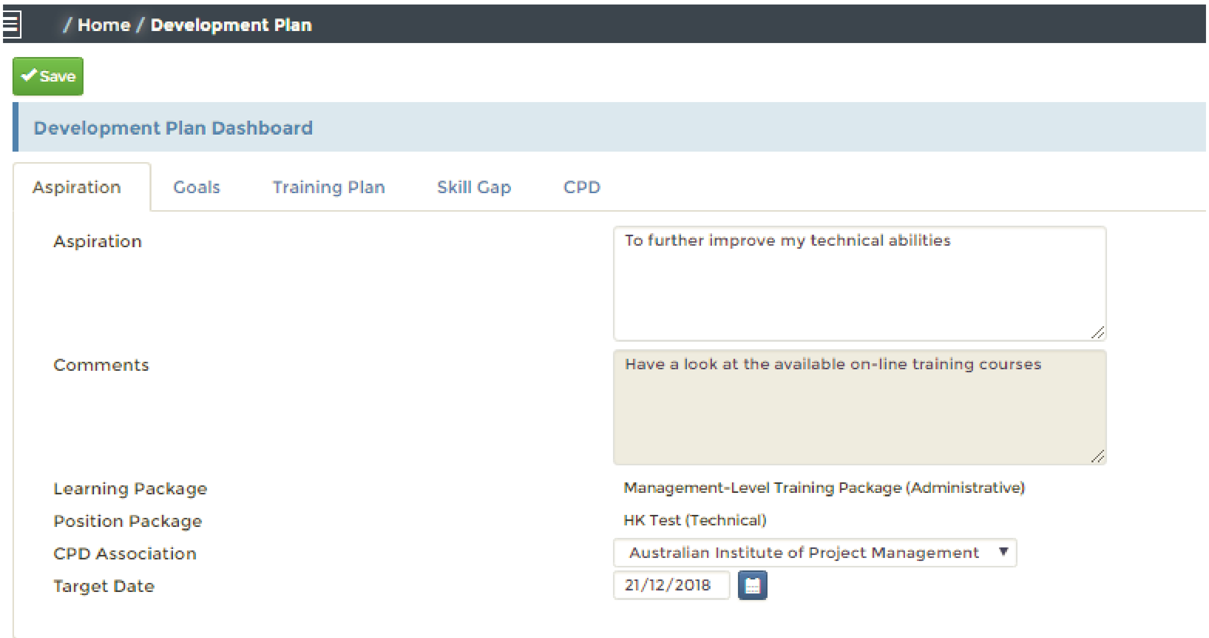
HOME > DEVELOPMENT



Development Plan

This is an overview of the employee's current development plan

(An employee only has one development plan that evolves over time. It is possible to have multiple development plans, or a history of plans, but for usability and simplicity the current design is that there is just one plan, with courses taken reflected on the history.)



Aspiration (tab)

The employee can enter free-text about what they can hope to achieve in their development

The manager/admin can enter comments, visible to the employee, about what they wish the employee to accomplish

The “Learning Package” and “Position Package” shows the current package(s) assigned to the employee directly, and to the employee's position. (On the Position Admin form you can assign a training package to that position.)

Goals (tab)

Shows the current goals and their current rating as setup by the employee (see below)

Training Plan (tab)

The Training Plan Course List shows

a) the courses from the Learning Package

b) the courses from the Position Package

c) other internal courses for which the employee has registered

d) external courses for which the employee has registered

Skill Gap (tab)

Shows a list of metrics (i.e. skills) assigned to the person, to their position, or to their job. The “Assignment” column indicates how the assignment was made.

The “Progress” and associated stop lights show if the employee has:

a) attained the skill by attending a course having that metric (green with date of completion)

b) has registered for a course having the metric, but has not yet completed (yellow)

c) has not attained the metric or registered for a course having that metric (red)

CPD (tab)

Shows a list of assigned CPD activities assigned to the person, the category, the points assigned to the activity and the association of that activity.

Skill Gap

This is the same information displayed on the summary tab but with the ability to search for courses or activities that will enable you to ‘close’ your skill gap.

> Skill Gap Analysis

See description of the “Skill Gap” on the Development Plan above.

In addition, this report contains:

- a link to the course detail for the completed / registered course

- a link to the metric detail

“Search Courses” link will only be display for those metrics that have not been attained or are associated with a registered course. This link will display a list of courses that contain the associated metric. From there, the user can register on a course needed to attain the metric.

Goals

> Strategic Goals

The employee can list up to 5 goals they wish to accomplish.

When a goal has been moved to history (see below) it will then create room for adding another goal up to the limit of 5.

> Self Evaluation

The employee can enter an ongoing rating and insight comments regarding each goal. The rating and comments will be appended to the list at the bottom of the form.

The employee may also indicate that the goal has been completed. When this is checked the goal will then appear on the history list.

> Goal History

Shows a history of the goals that have been completed.

Note,that if the employee marks a goal as completed, and then changes their mind, then they cannot make it current again.

Registration

> Training Plan

This report shows all courses that have been assigned to the employee, either directly or via a package, and the other internal and external courses the employee has registered on.

If a course has been assigned to an employee, but they have not yet registered on a course, then they may do so via the "Register" link

The "Course ID" link shows the details of the course

Note on the bottom of the report is "Status Authorisation = Empowered/Restricted"

If restricted, then the employee cannot update the status, only the administrator can do so.

If empowered, then the employee can update the status by clicking the icon.

(Our recommendation is to empower the employees to manage the status of their registrations.)

Also note, #4 status “Verified” is only visible to the manager/admin, and cannot be updated by the employee, even if empowered.

Clicking a status icon will set, or unset, the status to that value.

Note clicking on 1:Assigned/Requested will then reset the status to 0:Withdrawn/Cancelled

The “Grade” is only set by the manager/administrator, but is visible to the employee.

The “Move To History” button will move the course registration to the History report (where it can be restored if so desired.) Moving to history does not necessarily indicate that the course has been completed… only that it is no longer wanted to appear on the current plan.

> Course Registration

Provides a listing of all internal courses, and enables the employee to register on a course. The course list is not restricted by the courses on the employees plan… the employee can register for any course.

> External Registration

This enables the employee to register on a course external to the company course list

Once registered on an external course, the registration will appear on the training plan.

> Online training

Lists those courses that have an online component (i.e. a youtube course)

Clicking the launch link will open the URL in a new window

Note that there is no restriction on which online courses are accessible to the employee, and watching a course does not directly imply registration or completion of that course.

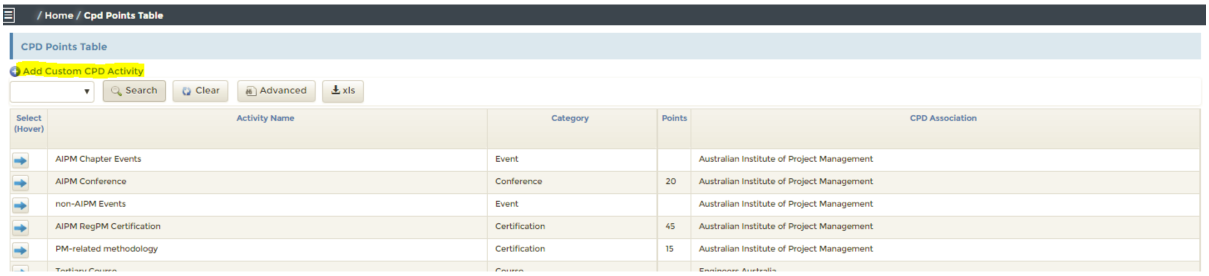
CPD

As a member of a leading global professional body, you understand the value of life-long learning. There might be an obligation for Continuing Professional Development to maintain your membership. This section gives the employee the ability to maintain a record of this activity for future reference.

> CPD Activity Report

Displays a list of all recorded activities with category, points and the relevant applicable association.

> Add CPD Activity



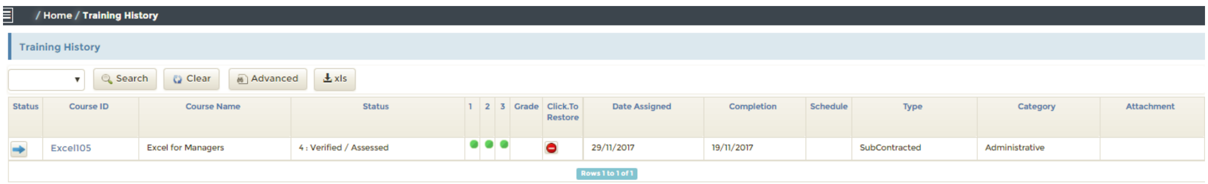
Select (Hover)	Activity Name	Category	Points	CPD Association
	AIPM Chapter Events	Event		Australian Institute of Project Management
	AIPM Conference	Conference	20	Australian Institute of Project Management
	non-AIPM Events	Event		Australian Institute of Project Management
	AIPM RegPM Certification	Certification	45	Australian Institute of Project Management
	PM-related methodology	Certification	15	Australian Institute of Project Management

Select activities from a pre-defined list or add a custom CPD activity.

Review

> Training History

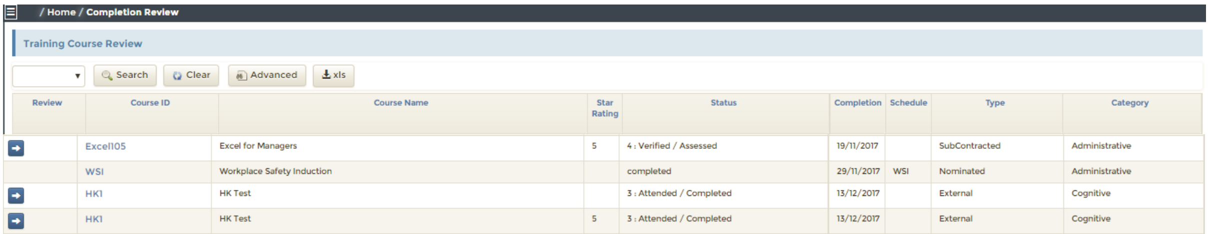
Displays a list of any of the employee's recorded training activities, including status, completion date, type and category



Status	Course ID	Course Name	Status	1	2	3	Grade	Click.To Restore	Date Assigned	Completion	Schedule	Type	Category	Attachment
	Excel105	Excel for Managers	4 : Verified / Assessed						29/11/2017	19/11/2017		SubContracted	Administrative	

> Completion review

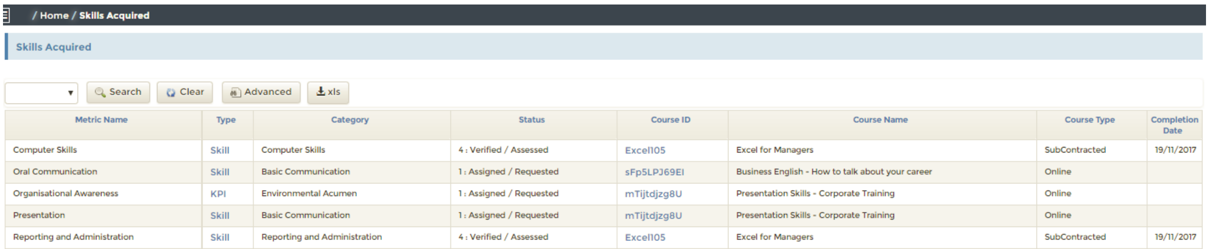
This enables the employee to enter a rating and comments regarding the courses that they have completed. Only completed courses may be reviewed



Review	Course ID	Course Name	Star Rating	Status	Completion	Schedule	Type	Category
	Excel105	Excel for Managers	5	4 : Verified / Assessed	19/11/2017		SubContracted	Administrative
	WSI	Workplace Safety Induction		completed	29/11/2017	WSI	Nominated	Administrative
	HK1	HK Test		3 : Attended / Completed	13/12/2017		External	Cognitive
	HK1	HK Test	5	3 : Attended / Completed	13/12/2017		External	Cognitive

> Skills Acquired

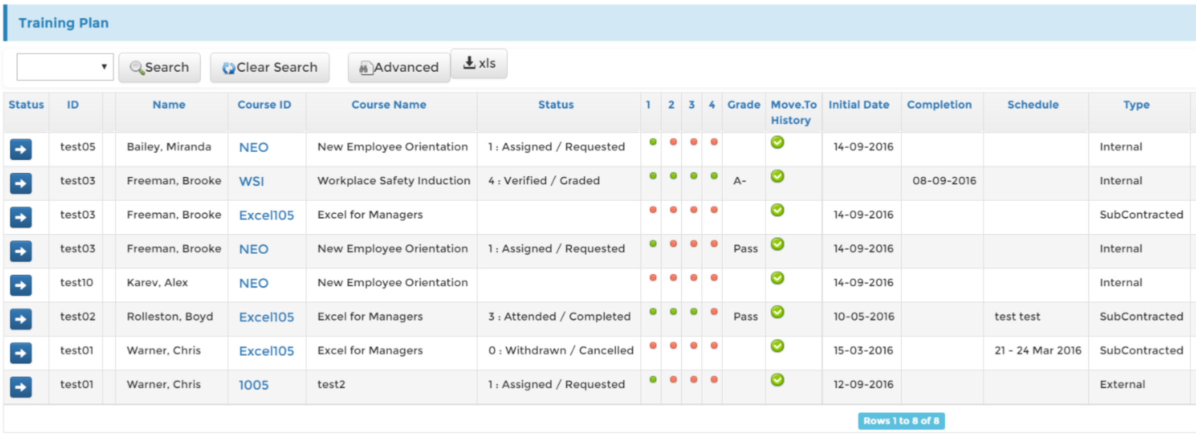
Displays a list of the potential skills the employee will acquire upon completion of the various assigned activities.



Metric Name	Type	Category	Status	Course ID	Course Name	Course Type	Completion Date
Computer Skills	Skill	Computer Skills	4 : Verified / Assessed	Excel105	Excel for Managers	SubContracted	19/11/2017
Oral Communication	Skill	Basic Communication	1 : Assigned / Requested	sFp5LPJ69EI	Business English - How to talk about your career	Online	
Organisational Awareness	KPI	Environmental Acumen	1 : Assigned / Requested	mTijtdjzg8U	Presentation Skills - Corporate Training	Online	
Presentation	Skill	Basic Communication	1 : Assigned / Requested	mTijtdjzg8U	Presentation Skills - Corporate Training	Online	
Reporting and Administration	Skill	Reporting and Administration	4 : Verified / Assessed	Excel105	Excel for Managers	SubContracted	19/11/2017

Administration Overview

As explained above, the Development module is centered on an employee's plan for learning and the skills acquired. I.e. the skills required for a position: the skills that can be learned on a training course, the skill that an employee should have because they are in a position, or their manager said that they needed to acquire a skill. The employee would then find a training activity that would teach them that skill, and could track which courses that they should be taking, and their progress on completing that activiity.



Training Plan

Search | Clear Search | Advanced | xls

Status	ID	Name	Course ID	Course Name	Status	1	2	3	4	Grade	Move.To History	Initial Date	Completion	Schedule	Type
	test05	Bailey, Miranda	NEO	New Employee Orientation	1 : Assigned / Requested							14-09-2016			Internal
	test03	Freeman, Brooke	WSI	Workplace Safety Induction	4 : Verified / Graded					A-			08-09-2016		Internal
	test03	Freeman, Brooke	Excel105	Excel for Managers								14-09-2016			SubContracted
	test03	Freeman, Brooke	NEO	New Employee Orientation	1 : Assigned / Requested					Pass		14-09-2016			Internal
	test10	Karev, Alex	NEO	New Employee Orientation								14-09-2016			Internal
	test02	Rolleston, Boyd	Excel105	Excel for Managers	3 : Attended / Completed					Pass		10-05-2016		test test	SubContracted
	test01	Warner, Chris	Excel105	Excel for Managers	0 : Withdrawn / Cancelled							15-03-2016		21 - 24 Mar 2016	SubContracted
	test01	Warner, Chris	1005	test2	1 : Assigned / Requested							12-09-2016			External

Rows 1 to 8 of 8

There are five numerical levels that are used to indicate the "Status" of the activity on a person's plan corresponding to the lifecycle of the course assignment...

0 : Withdrawn / Cancelled

1 : Assigned / Requested

2 : Approved / Registered

3 : Attended / Completed

4 : Verified / Graded

The "Initial Date" shows when the activity was assigned to the employee... and thus how long it has been on their plan. The "Completion Date" is entered by the Manager/Admin for Status 4 : Verified / Graded, and indicates that the activity is complete and the skills associated with the acivity have been acquired.

The “Schedule” can be selected when the employee registers (or is registered) for the activity. The concept of schedule is simpler in the Development module than it was in the replaced Training module.

The 4 stoplights correspond to the “Status” of the registration. These are “clickable”

If the Status is 1: Assigned/Registered and the first stoplight is clicked, the Status will change to 0: Cancelled/Withdrawn

If the Status is 0: Cancelled/Withdrawn and the first stoplight is clicked, it will toggle back to 1: Assigned/Registered

If the third light for 3: Attended/Completed is clicked, the first three lights will be green, AND the Completion Date will be set.

Clicking the third green light again will turn it red, set the Status to 2: Approved/Registered, and clear the Completion Date.

In this manner, it is easy to update the student status.

Also, the far left Status button will initiate a popup form such that the admin can set the status, enter a completion date, enter comments, etc.

The “Move To History” one-click button indicates that the course is no longer relevant to the current Training Plan, but will be retained on the person’s Training History. (Once on the History, the course can be restored to the Training Plan if required)

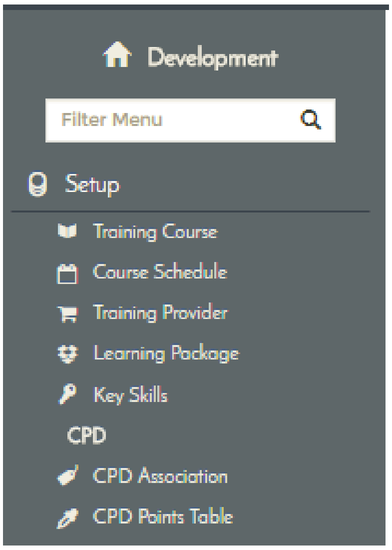
Wouldn’t it be great if the company Training Administrator managed all this by themselves! Then we would have complex workflows requiring approval at each step of the process. Also, nothing would happen unless all parties in the organisation were designing courses, and registering students, and grading results. All of these concepts were in the replaced Training Module. In the real world, the Admin user typically does not have time or interest to setup and manage all the training courses and student registrations, and therefore nothing gets done.

However we have retained all this control with the actions of the employee being "Restricted". All the student can do is apply for a course registration requiring approval. The manager and admin must do everything else to manager the data.

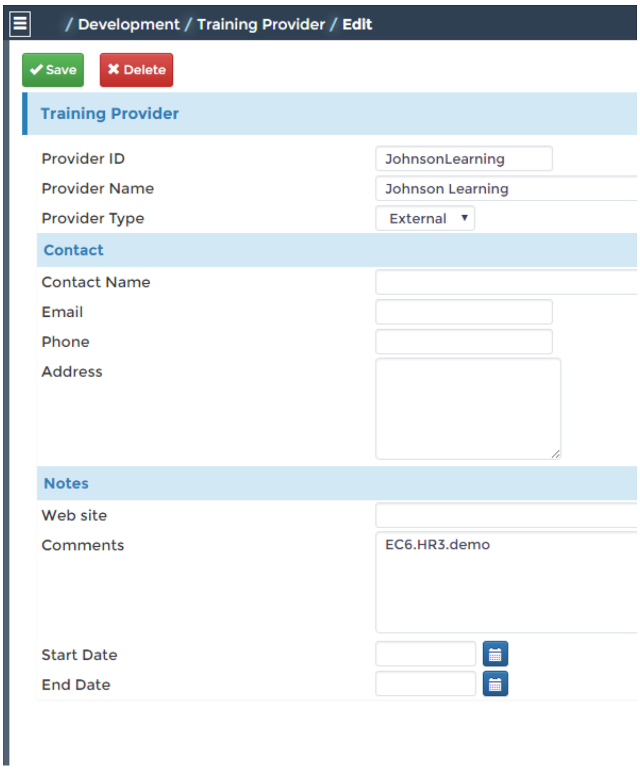
But we have also designed in the capability that the employee can be "Empowered". The employee directly registers for courses, and can then update the course status and completion date (but not enter a grade or set the status to 4: Verified/Graded). In this fashion, the employee can be responsible for updating the information relating to their training plan, and thus managing the skills acquired and "closing the skill gap". The manager and admin can just sit back and monitor what is happening.

In order to achieve the maximum results, it is recommended you follow the following steps in sequential order.

Setup



>Training Provider



When creating a new provider, it is important that the provider id is unique. By using an already saved provider id, a new provider will not be created but the provider with the entered id will be updated.

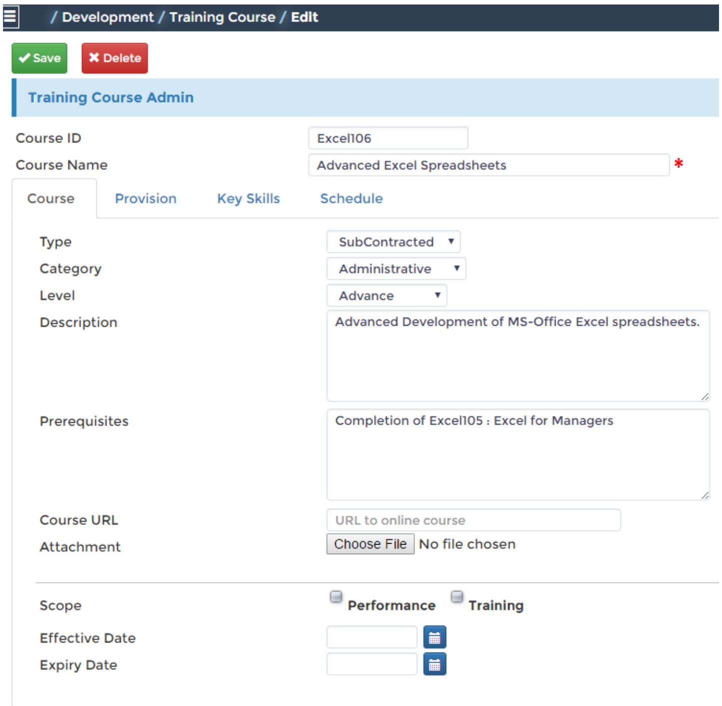
Training providers can be either Internal or External.

>Training Course

From the training Course report select the +New icon to create a new course.

It should be noted that there are various types which can be allocated including time on the job, online courses, videos to be viewed and the like. Therefore it is better to think of this course definition as Learning Activities not just formal training courses.

A wizard with 4 tabs will be presented for completion. The minimum information required is Course Name, however the more information entered, the better the results will be.



Course details are split into multiple tabbed forms. When creating a new course, it is important that the course id is unique. By using an already saved course id, a new course will not be created but the course with the entered id will be updated.

The Pick Lists available for Type, Category and Level can be updated by a System Administrator if required.

Type	DevelopmentCourseType list value
Category	DevelopmentCourseCategory list value
Level	DevelopmentCourseLevel list value

The Effective and Expiry dates determine the availability of the course relative to today's date.

The Provision tab holds information as to the Provider, minimum and maximum number of delegates, duration and any resources required.

The Key Skills tab allows you to define the Metrics (skills) that will be achieved by attending the course

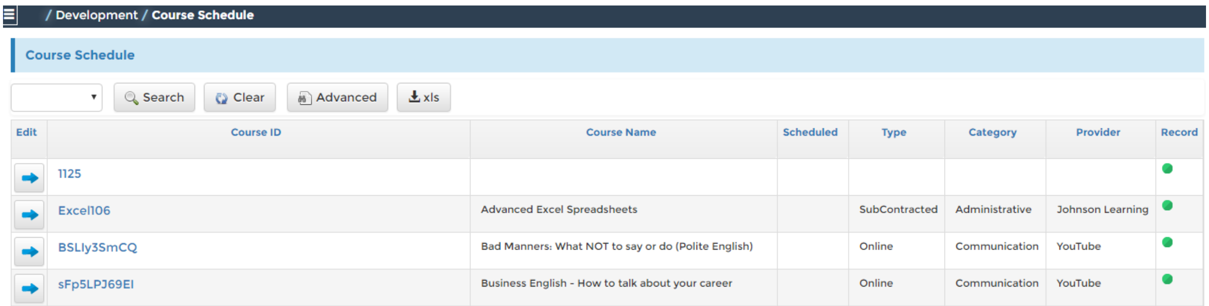
The Schedule tab enables you to create schedules for employees to request registration on the course for specific dates.

If you don't specify a schedule name, the start date of the course will be used when you save the record.

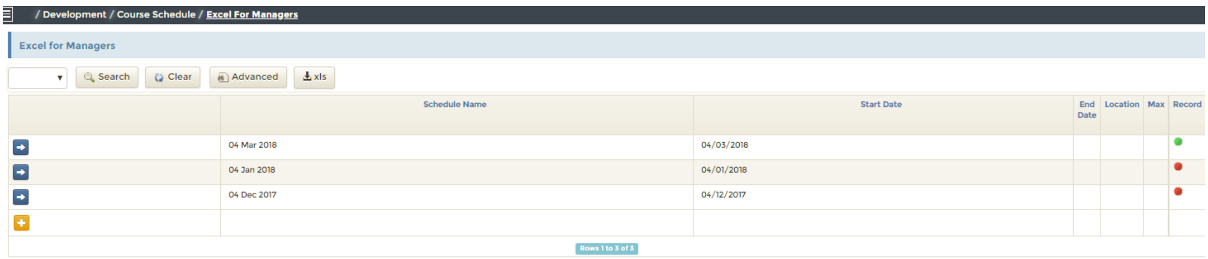
Each schedule could then be edited to change the location if applicable.

>Course Schedule

The Course Schedule report displays similar information as the Development Course Schedule report but also inculdes any existing schedules relating to the courses and their current status.



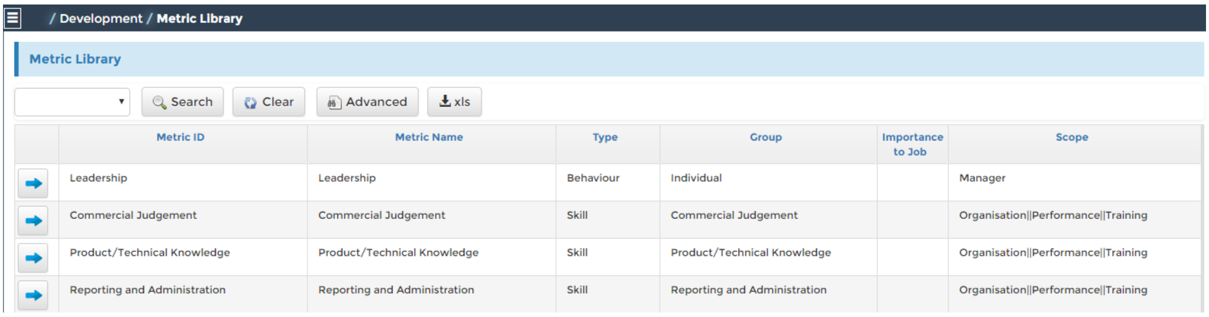
You can Edit an existing schedule record or create a new schedule



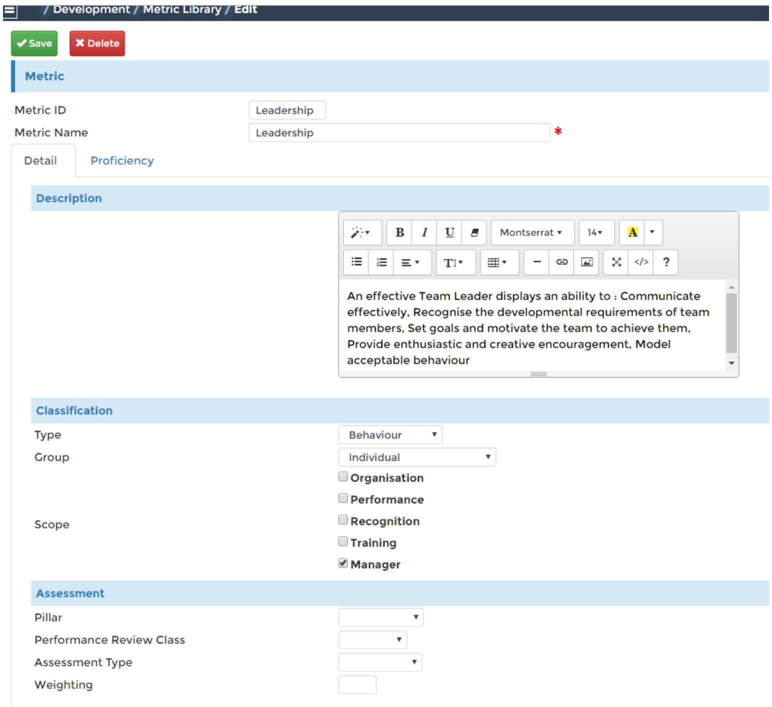
Metrics

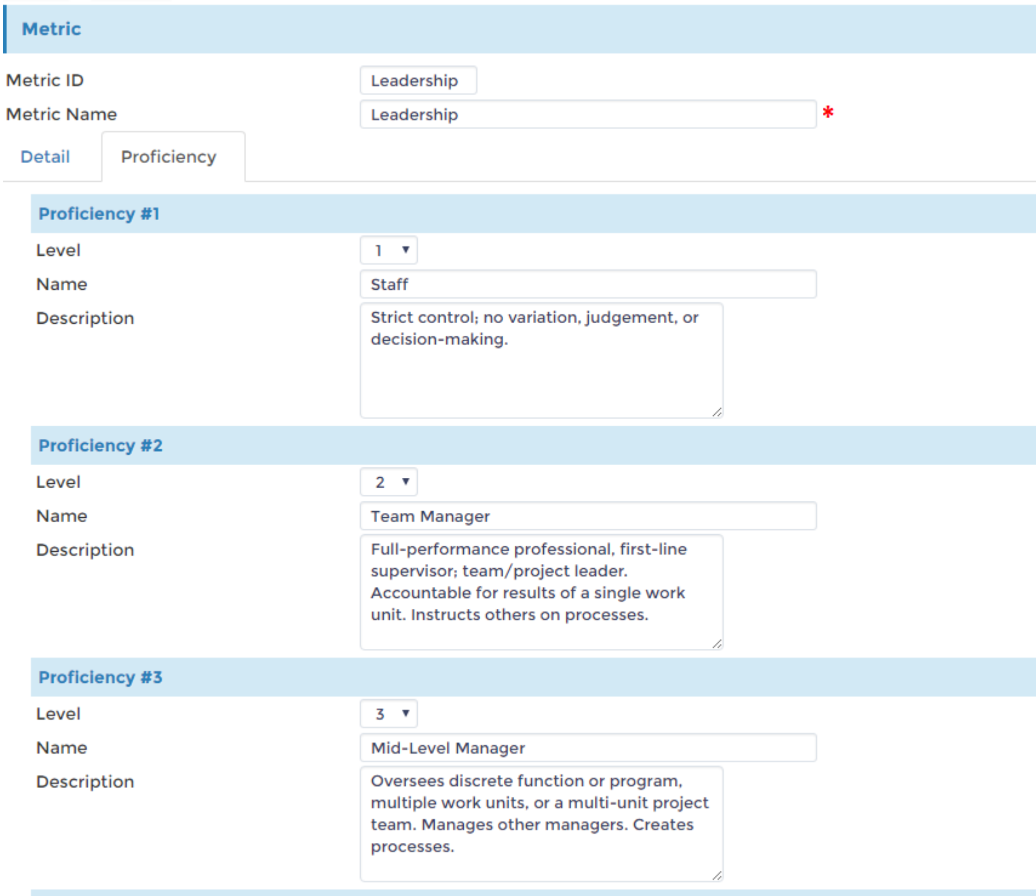
The metric library is used to define skills, competencies, behaviours, etc. associated with development courses. Employees will be assigned metrics via the job or performance review. Gap analysis can then be investigated to identify the skills that should be obtained by the employee, and the associated development courses that will provide those skills.

Metrics are defined as a type and may also have sub types. They are assigned to a defined group. Metrics are also assigned a scope – either Organisation, Performance or Development or possibly all three of the available scopes. If there is an assessment criteria attached to a metric, it can be defined as well as a weighting factor for the specific metric. Up to 5 proficiency levels may be defined for any given metric.



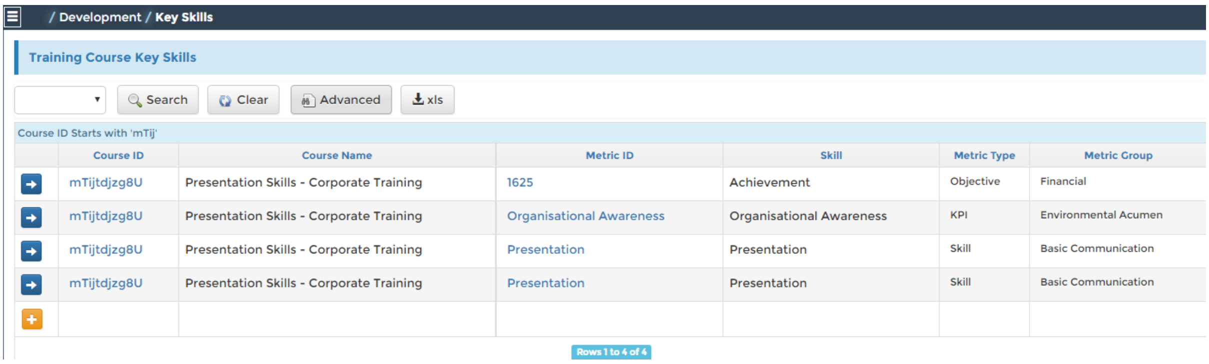
Create a new metric using the tabbed form:





>Metric Assignments to a course

Metrics can be assigned to courses using the KEY SKILLS link in the Setup Section..

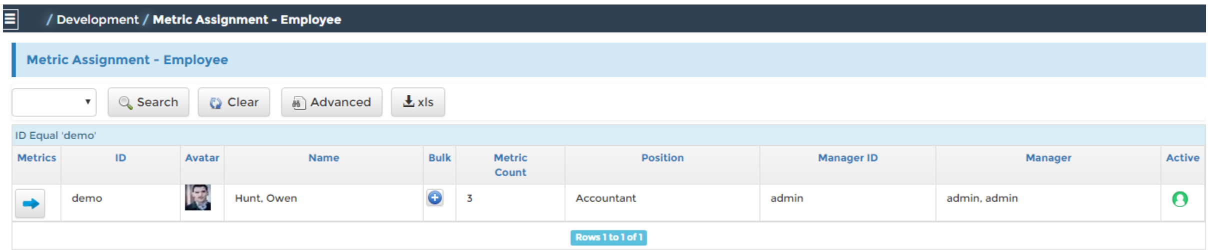


	Course ID	Course Name	Metric ID	Skill	Metric Type	Metric Group
	mTijtdjzg8U	Presentation Skills - Corporate Training	1625	Achievement	Objective	Financial
	mTijtdjzg8U	Presentation Skills - Corporate Training	Organisational Awareness	Organisational Awareness	KPI	Environmental Acumen
	mTijtdjzg8U	Presentation Skills - Corporate Training	Presentation	Presentation	Skill	Basic Communication
	mTijtdjzg8U	Presentation Skills - Corporate Training	Presentation	Presentation	Skill	Basic Communication

Any number of metrics can be assigned to a given defined course using the + New Icon at the bottom of the report

>Metric Assignments to Employees

Existing Metrics can be assigned to employees using the Employee Assign link in the Metric section of the menu.



Clicking on the Edit pencil will display a listing of the existing metrics assigned to the employee and also allows the additon of additional metrics through that listing.

The Bulk Icon will display the entire metric library and you can select any number of metrics to assign to the selected employee and click the save button once.

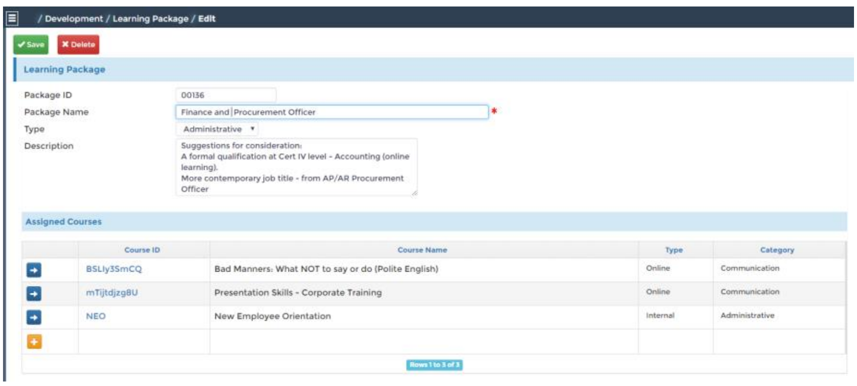
There are 2 useful reports in the Metric session enabling easy searching. They are Search Assignment (Search Metrics by Employee) and Search Course (Search Metrics by Course).

>Learning Packages

It is ideal to create Learning Packages based on positions which will then flow through to new employees. Packages can also be assigned to existing employees.

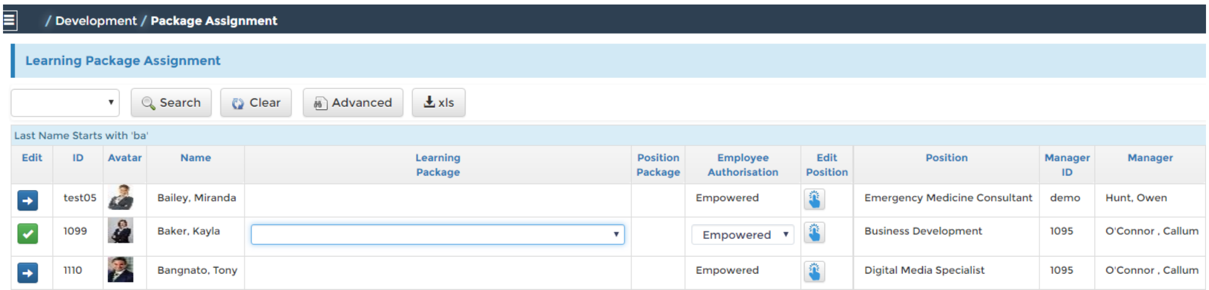
Creating a Learning Package is done in the Setup section of the menu.

The Package can be composed of any number of defined courses with the metrics attached.



Once you have made any changes to either packages or employees in this area, you will need to Reload Plans for the changes to flow through and to generate an initial record for each employee. This is when you also decide whether employees will be 'empowered' or 'resticted' in relation to what actions they can perform regarding their own training records.

Learning Packages are then assigned to employees through the Package Assignment link in the Maintenance section.

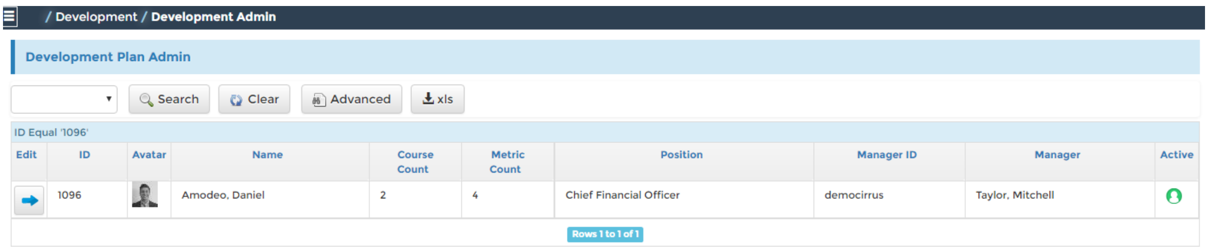


Once the Learning Package has been assigned to a position you will have an Edit link to make any required changes.

Development Plans

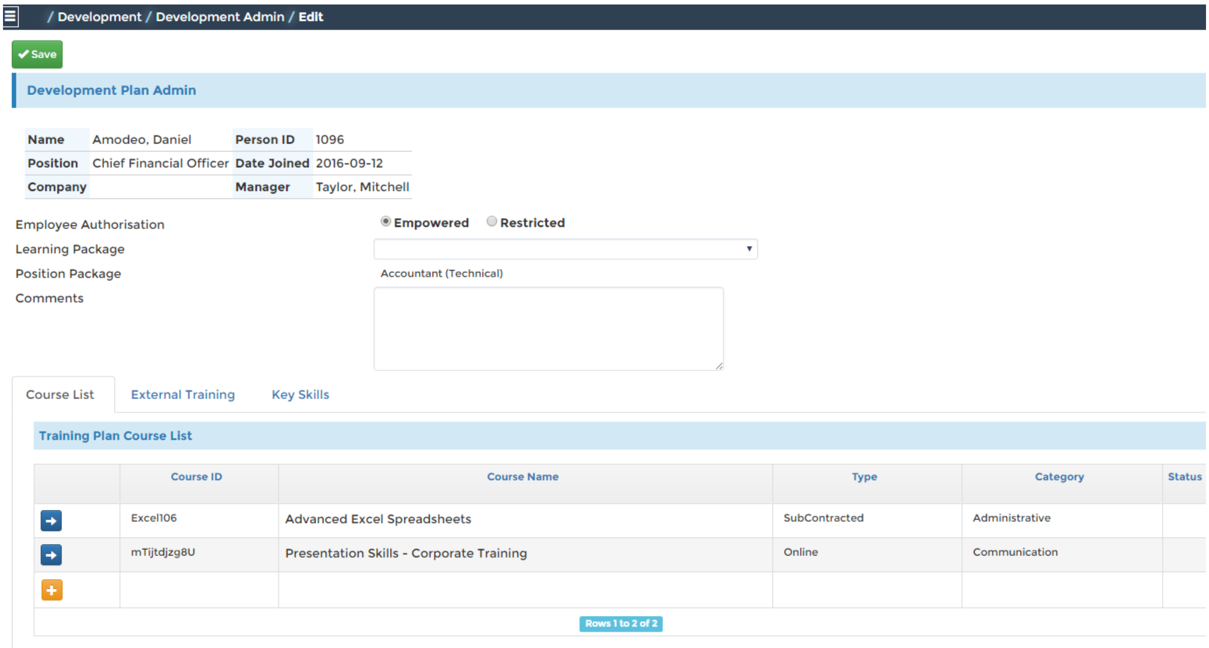
A Development Plan shows the learning that an employee is expected to complete. The learning plan may be assigned to the employee directly or as a result of their position. The Development Plan may be open ended or may relate to a defined period or a phase in the employee's development.

The Reload Plans generated an initial plan for all employees. Now, you can customise the Learning Plan for an individual through the Development Admin link in the Maintenance Section in the first instance.

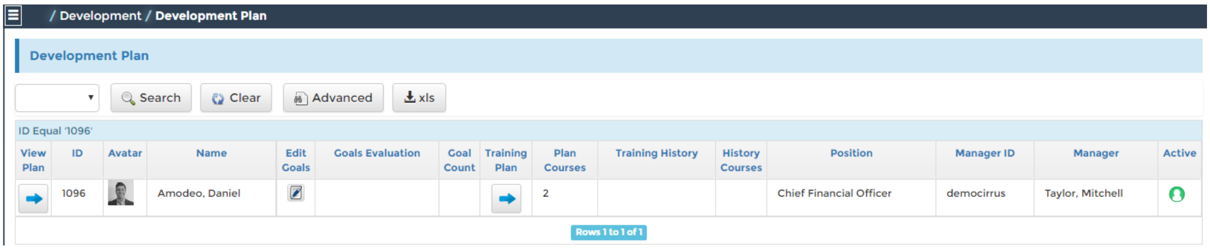


This report displays a summary for the selected employee indicating the current metric count and course count assigned to the employee.

Clicking on the Edit icon allows you to make any required changes to this individual's Learning plan.

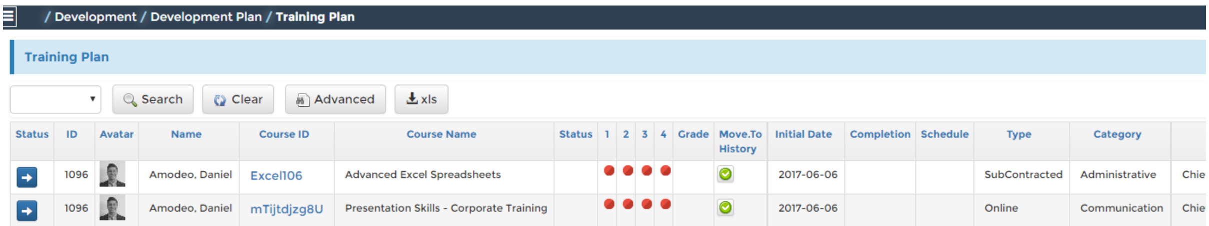


Alternatively, the Development Plan link in the Plan section gives a more detailed view and access to update an employee's Learning Plan



The View Plan icon displays the plan but also includes any defined Aspirations and Goals.

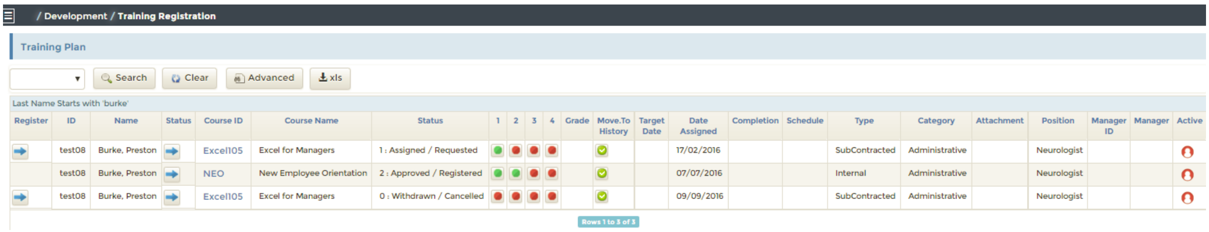
The Training Plan icon displays the Training Plan as first described in the Overview



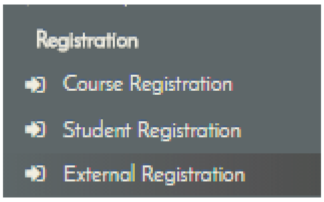
This Plan has been built for the individual from a Package and adding the additional activities to create a complete development plan.

>Training Registrations

If your employees are not empowered to maintain their own development activities, then an administrator will be required to maintain the registration records and their status.



This includes the links to enable registering any number of employees to a scheduled course, selecting a student and registering him/her to a specific scheduled course or entering a registration record for an employee attending an external course in the Management Section



Review

This section is useful to display an overview of the training records by employees or course. The Skills Acquired report lists the employees with a summary of their activities with links to view the details if required. The CPD activity report displays the activities for thouse employees recording their CPD activities.