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1.0 Introduction to Performance Manager

1.1 Application Overview

OnPoint's Performance Manager ("OPPM") module is a key component of the learning and performance suite, designed to be used by departmental- and supervisory-level managers to review the performance levels and achievements of their associated employees and communities. With OPPM, managers can review course completion and assessment status for all their assignees, complete evaluations on their team members, and access full dashboard reporting—all through a group-branded interface (see Figure 1-1 below).

Performance Manager is a web-based application and most of its basic and extended functionality is generally accessible via an Internet web browser on a PC, Macintosh or Unix workstation. OnPoint recommends a broadband-connected workstation to execute most Performance Manager program features. Using Performance Manager, managers can quickly and easily view individual user progress as well as run reports on all of the users that report to them.

Intended Audience. The Performance Manager application was written for a non-technical audience and was designed to be intuitive to understand and use. Once the system is up and running, the average managerial user can learn the basics of navigating and utilizing the application in less than an hour, and they can be fully productive with all the features and functions of Performance Manager within a few hours time. Performance Managers will not typically need any formal training; some organizations may wish to hold a few webinars for managers to provide a basic overview of the application and to answer any questions. An online help page is accessible within Performance Manager, and a customizable OPPM Quick Reference Guide is downloadable from the OPPM help page to assist managers in understanding specific functions or common procedures.



Figure 1-1 – Performance Manager Home Tab

1.2 Performance Manager Levels

OnPoint's Performance Manager application is a shared web application that provides system access to several different types of administrators and performance managers. To facilitate group activities and impose organizational controls, the system makes use of two different types of access levels for managers, and also allows site administrators to have access for reporting purposes where desired.

Administrator accounts and performance manager accounts represent/use different licensing scenarios as well. There are typically only a few (less than ten) authors/administrators with a license to the OnPoint Course Manager application in any one organization, whereas there may be hundreds or even thousands of performance manager licenses in the same organization.

The two available Performance Manager levels are:

Reporting Manager – The Reporting Manager system role provides the manager the ability to view progress details, summaries and histories for all members of the Group(s) they manage. Reporting Managers can access the dashboard and generate selected reports, perform evaluations on their users, review and approve pending assignment requests, and view messages sent to their managed groups. Reporting Managers cannot add/delete users, edit existing user profiles, or make assignments to users. Reporting Managers also have the ability to reset a user's password to the customer level default, if this function is enabled.

Group Manager – The Group Manager system role provides the manager all of the above Reporting Manager capability. In addition, Group managers can edit existing user profiles, change a user's status (including marking users for deletion), and make direct assignments to users. Group Managers can also add new users if the system configuration is set to allow that. Password resets to the customer level default are allowed if this function is enabled. Group Managers can make user membership assignments to any location or job code, but can only make group-based membership assignments to groups that the Group Manager manages.

The majority of manager licenses used in an organization are typically Reporting Managers. Since this level manager has no user editing or assigning ability, they are considered "safe" in terms of the affect they can have on the main database. They can only view users who report to them, and they can "reset" a user's password only if you have set the system to allow that function.

Group Managers on the other hand should be provided some basic training on the system concepts and be clearly advised as to what capabilities they have and how best to use them. For example, if the system administrators are developing strict learning paths for users based on job codes, associated assignments are being made by the system automatically. This can be adversely affected by a Group Manager who decides to change or make additional assignments to those users.

1.3 Logging In

Once your hosted site or application instance has been properly installed and configured, you can access the Performance Manager application using your web browser by pointing to the appropriate or assigned URL ("Uniform Resource Locator") as supplied by OnPoint's Support Team or your own systems administrator.

System Administrators can access the Performance Manager application directly, or via a link from an OnPoint portal (OP-Portal or OPWM).

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Performance Managers should access the Performance Manager application via a link from an OnPoint portal (OP-Portal or OPWM). This will ensure that, upon login to the portal, the manager's interface will be branded appropriately and he/she will have access to the correct applications.

Administrator Access

LMS System Administrators typically access the Performance Manager application via a link from the OP-Portal application so that they do not need to re-login. For LMS Administrators who desire to access the OPPM application directly and for CellCast Administrators, simply append 'oppm' to your regular system URL address in order to reach a login screen (see Figure 1-2 below).

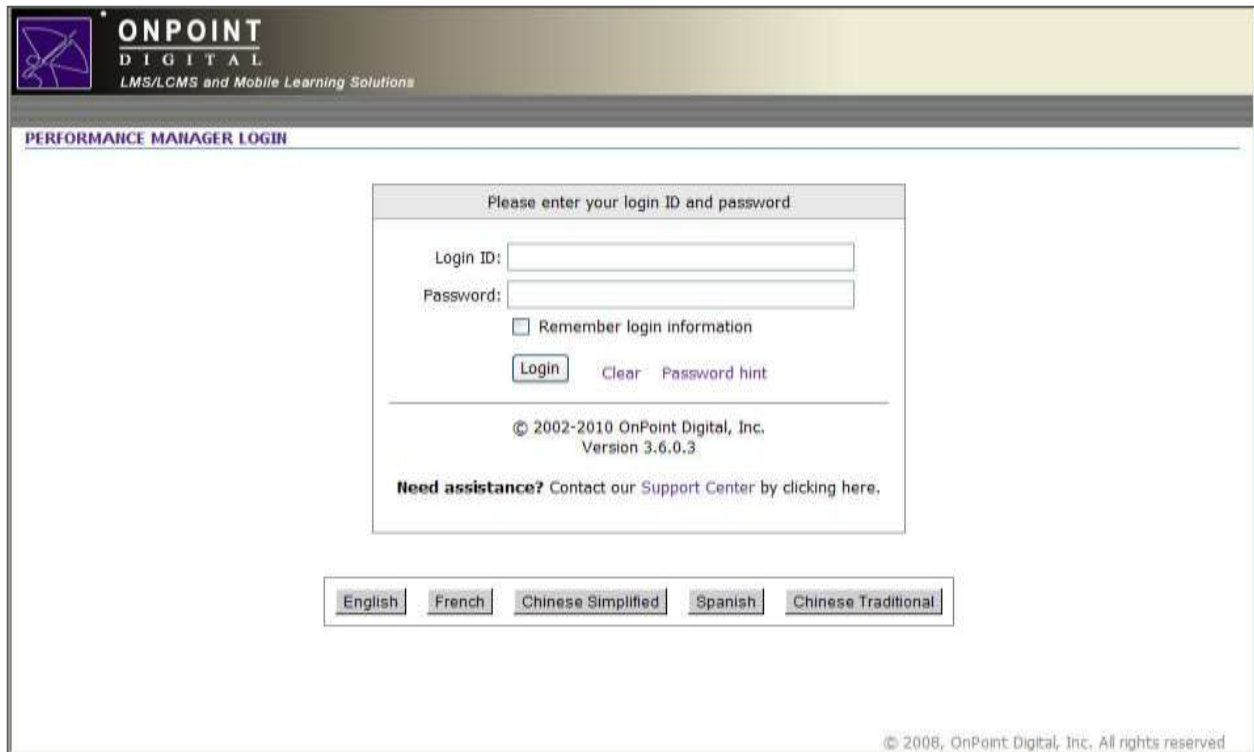


Figure 1-2 – Performance Manager – Direct Login

There are a few additional utilities and functions found on the Performance Manager Login Screen, including:

1. [Password hint](#) – This link provides the manager their stored password hint
2. [Version Information](#) - Knowing the version of Performance Manager you're using can simplify support tasks. Hosted customers automatically receive regularly scheduled updates so your version number will change periodically. Version information is also included on the OPPM Home tab.
3. [Support Center](#) – This link opens the default email application on your workstation so you can quickly create and send an email to your designated in-house support team. This contact link is also typically included on the OPPM Help page as well.

If your organization is using multiple languages, the language options will be listed as well, allowing you to select to view the application interface in that specific language.

Enter your login and password, and click [Login](#) to open the application.

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Reporting and Group Manager Access

Managers should access the Performance Manager application via a link on their portal (OP-Portal or OPWM), so that they do not need to re-login and to ensure that they are presented with any associated OPPM group-based branding (see Figures 1-3 and 1-4 for example portal links).

The screenshot displays the OnPoint Digital portal interface. At the top, the logo for OnPoint Digital is shown with the tagline "LMS/LCMS and Mobile Learning Solutions". Below the logo, the user is greeted with "Welcome Paige Harris. Last Login: Jul 6 2010 1:45 PM". Navigation links for "My Profile", "Help", and "Logout" are visible. The main content area features tabs for "Learning Path", "Courses", "Events", "Activities", and "My Status". A central banner reads "Welcome to the Online Learning Center" and provides instructions on how to use the tabs. Below this, there is a "View Course Catalog" button and a section for "Assignments Pending Completion" with a "Refresh" button. A table lists several courses with their completion status:

Courses	Status
BBS Sales Field Training Test	Not Attempted
BWyze SCORM Test	Not Attempted
Knife Handling Demo Course (Brandon-Hall)	Not Attempted
OnPoint Test Course	Not Attempted
Overcoming Objectives	Incomplete
Time Management	Not Attempted

In the left-hand sidebar, under the "MANAGER OPTIONS" section, the "Performance Manager" link is highlighted with a red box and a red arrow pointing to it. Other links in this section include "Course Manager" and "Event Attendance".

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Figure 1-3 – Performance Manager Link from OP-Portal

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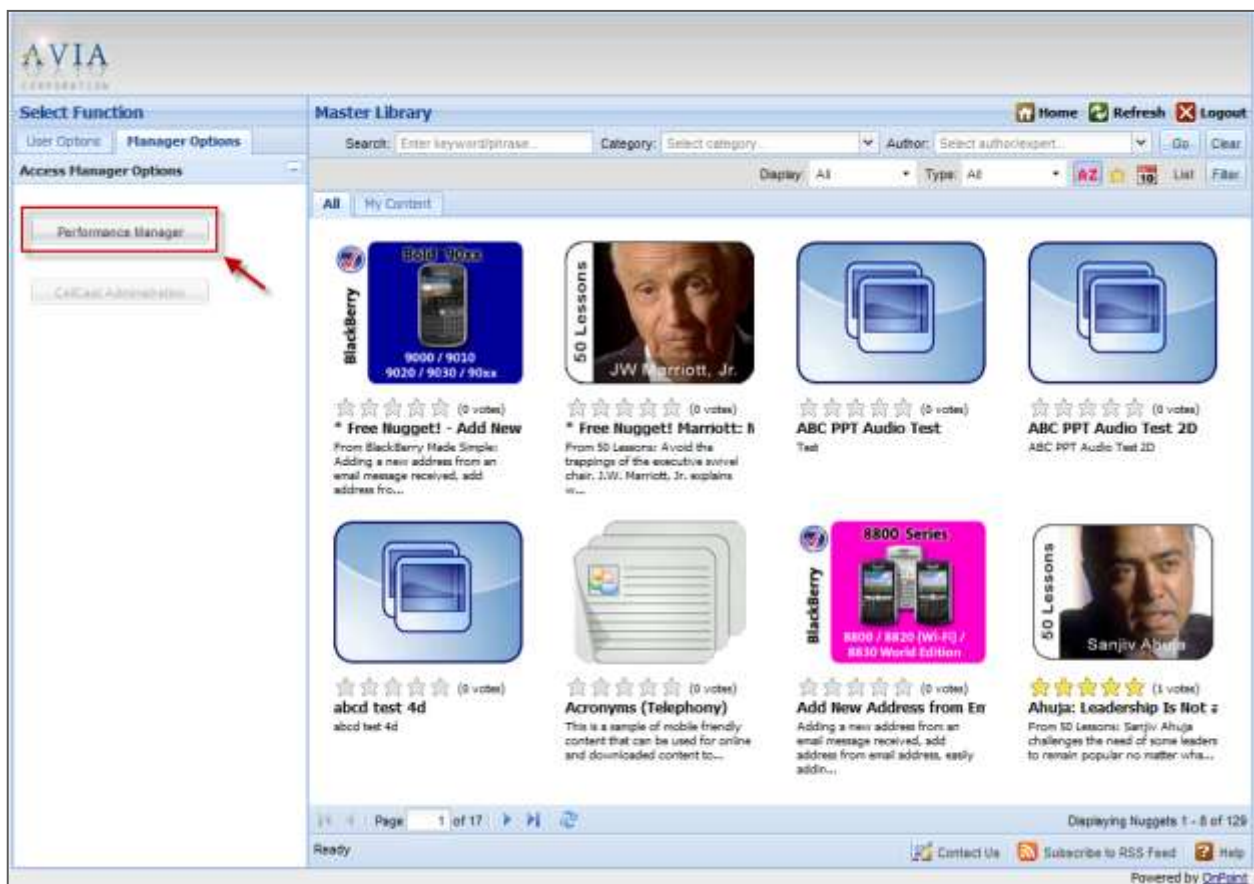


Figure 1-4 – Performance Manager Link from OPWM

1.4 Interface & Navigation

The Performance Manager Main Menu is comprised of several informational displays and provides a 'point and click' interface to access any of Performance Manager's many features and functions. As shown in Figure 1-5 below, the interface consists of the following components:

- Branded company or group-based banner
- Icon strip for navigation links
- Tab-based menu system
- Data display area



Figure 1-5 – Performance Manager Main Menu

Banners

The banner for OPPM is typically created and uploaded into the OnPoint Course Manager application by OnPoint. Managing and assigning banners is performed under the Administration tab in Course Manager, under System Administration – Manage Customers; this selection is accessible by Root Administrators only. One primary banner can be used for all Performance Managers, or different banners can be created for specific primary groups if desired.

Application Icons & Links

Performance Manager icon links include:

Home: directs a Manager from any Performance Manager screen back to the Home Page/main menu.

Help: opens a pop-up page that provides downloadable items such as the OPPM Quick Reference Guide. It also provides a set of clickable paragraphs describing the navigation and key tabs. These descriptions can be customized to reflect the tab selections you have made, so that the paragraphs are consistent with the displayed tabs. This Help page is prepared and maintained by OnPoint's Support Team and updated as needed to provide a basic overview for new managers on the common Performance Managers features and functions.

Close: facilitates a graceful exit from the system instead of just closing your web browser. Clicking the Close link generates a pop-up message asking the user to confirm they would like to close the application.

Tab-based Menu System

The OPPM menu system is designed as a selection of tabs, each offering a unique capability as described in Section 2 of this guide. The tab selections can easily be reordered, re-captioned, or turned off as desired by each customer. This customization is discussed in more detail in Section 3.3 of this guide.

1.5 Help Page

The OPPM Help link opens a help page that provides links for managers to download an OPPM Quick Reference Guide as well as view standard paragraphs that summarize the various tabs available; see Figure 1-6 below.

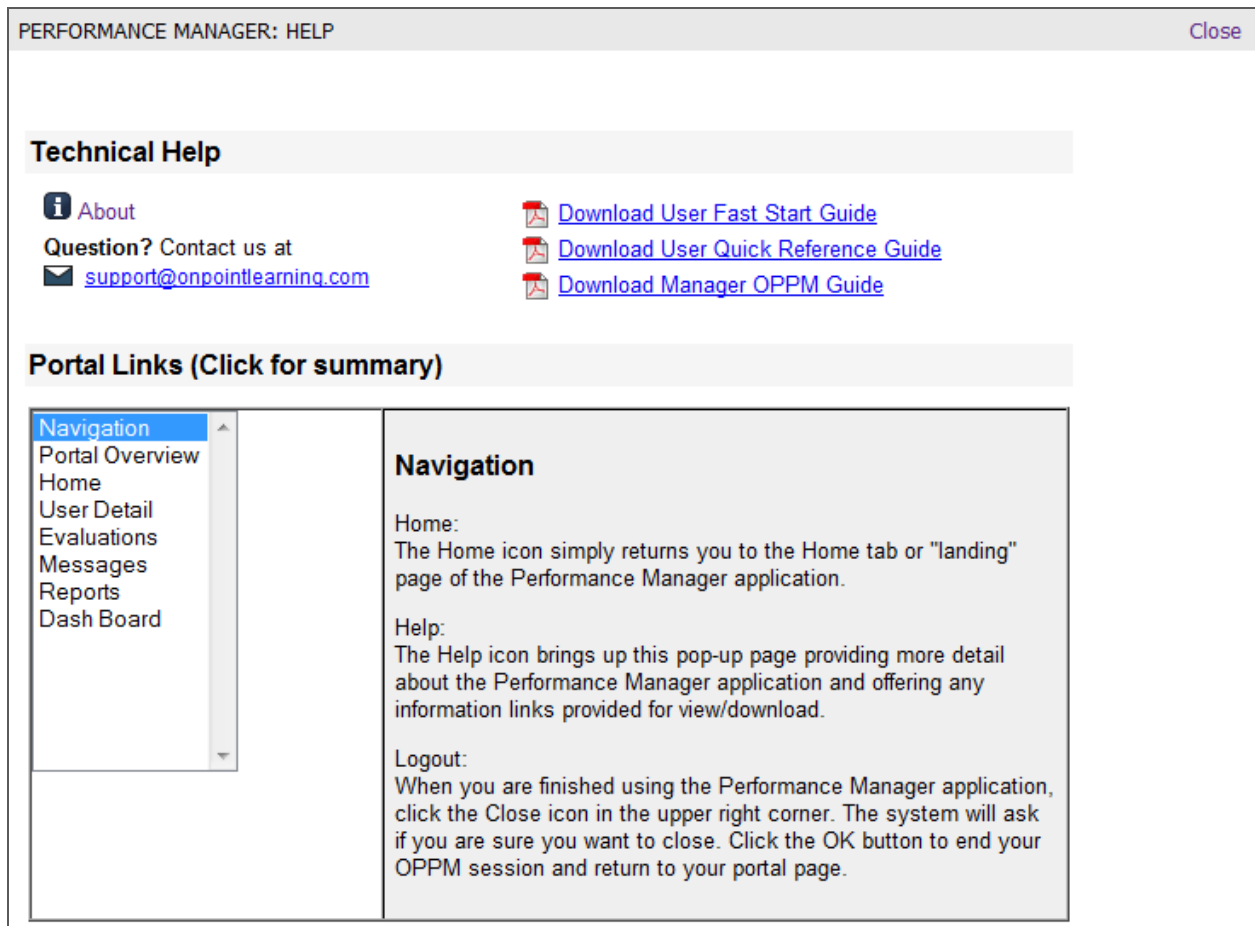



Figure 1-6 – Performance Manager Help Page


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Links

Several standard links are provided at the top of the Help page, including:

 *Contact Us* – This link opens the default email application on your workstation so you can quickly create and send an email to your designated support team.

 *About* – This links to a page that lists several contributing technologies and open source tools that are integrated into Performance Manager as well as lists the various design and development contributors who make the application possible.

Customers may choose to add additional items/links to this Help page as desired.

The standard Help paragraphs (shown under “Overview Links”) are also provided to new customers for editing via a Word document. Paragraphs can be changed or removed altogether (if the customer is not utilizing a particular tab). Once your redlined edits are sent back, OnPoint will make all necessary online changes.

Guides

A generic version of the OPPM Quick Reference Guide is provided to new customers so that they can edit it as desired. Customers can make their own edits/updates to the document directly, or redline their changes and return the document for OnPoint to update. OnPoint will then post the final guide to the server so that it can be accessed by managers in OPPM.

2.0 Performance Manager Tabs

2.1 Home Tab

The opening screen is the Performance Manager Main Menu or 'Home' tab (see Figure 2-1 below). The data displayed on this first screen includes the Login Information for the manager as well as a Company Message that is typically general information for all Performance Managers.

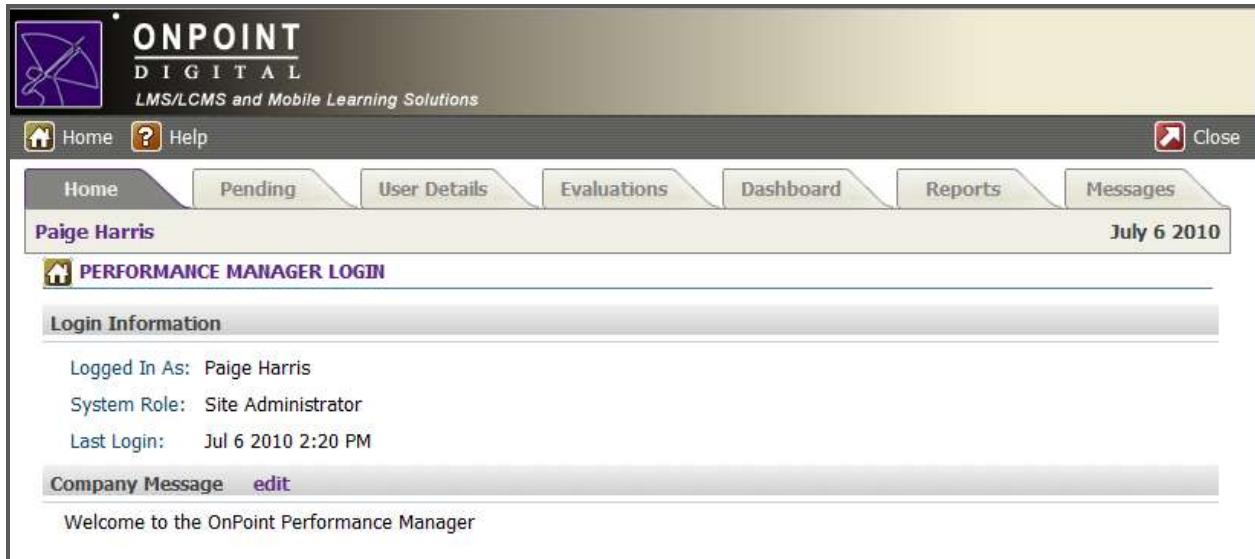


Figure 2-1 – Performance Manager Help Page

Login Information. Displays your Login Name, System Role, and Last Login date and time.

Company Message. This area is designed to allow a system administrator to easily enter any information or message that is appropriate for all performance managers. When an administrator logs into Performance Manager, an edit link will display, allowing them to change the message as desired. Simply click the **edit** link to the right of the Company Message header and the HTML editor will appear, allowing the message to be updated (see Figure 2-2 on the next page).

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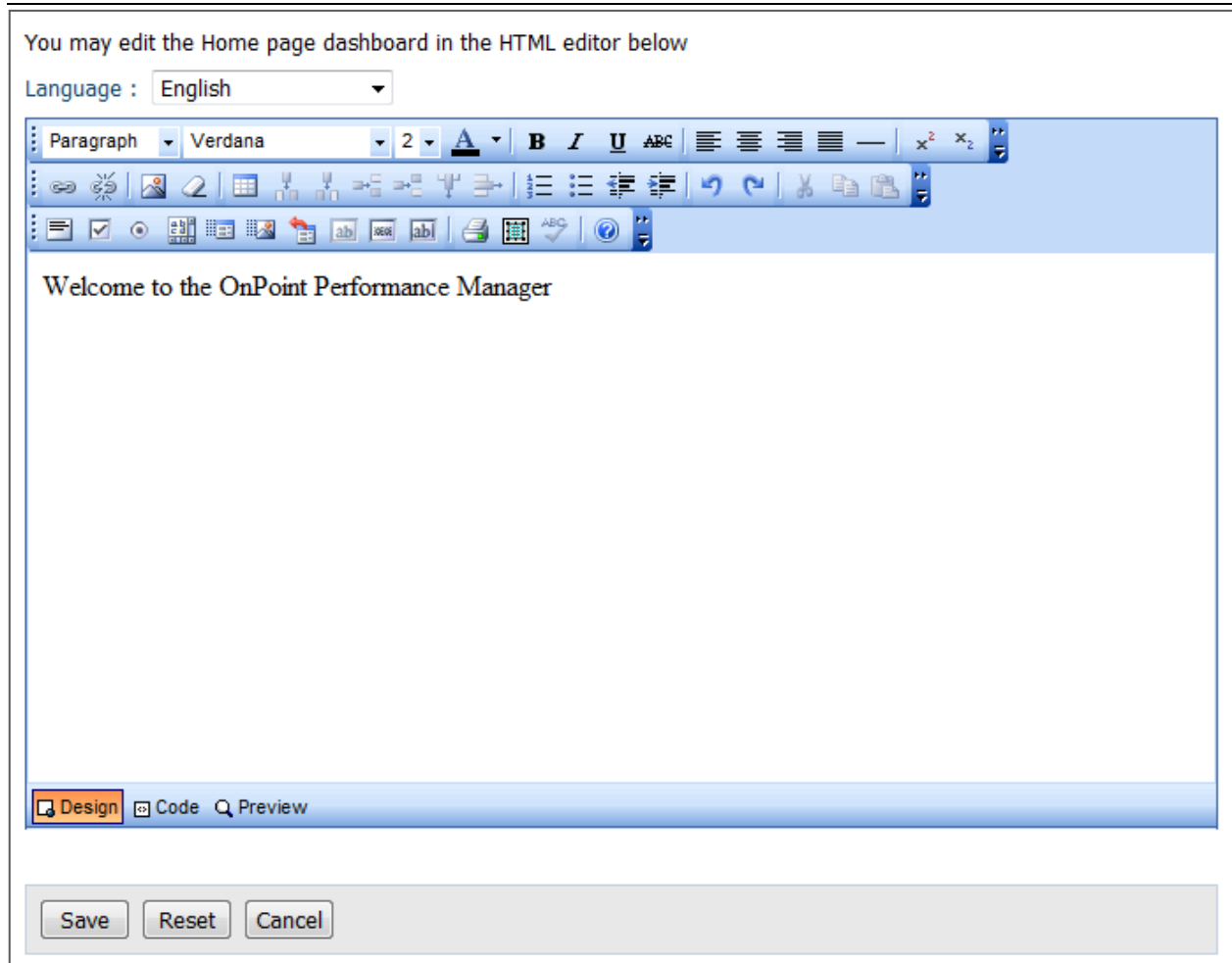


Figure 2-2 – Edit Company Message with HTML Editor

After making your changes click one of the following:

- **Save** – To save your changes.
- **Reset** – To clear your recent changes.
- **Cancel** - Returns you to the Home tab without saving your changes.

2.2 Pending Tab

The Pending tab shows pending user assignment requests (**indicated in bold**) that need to be addressed. Manager tasks include approval and denial functions that permit/deny users access to new Courses, Assessment Sets (standalone tests), Nuggets (short-form content), Events (Instructor-Led training and Webinars), and Activities.

Whenever one or more tasks need to be reviewed, an **Approve** link will be displayed (see Figure 2-3 on the next page).

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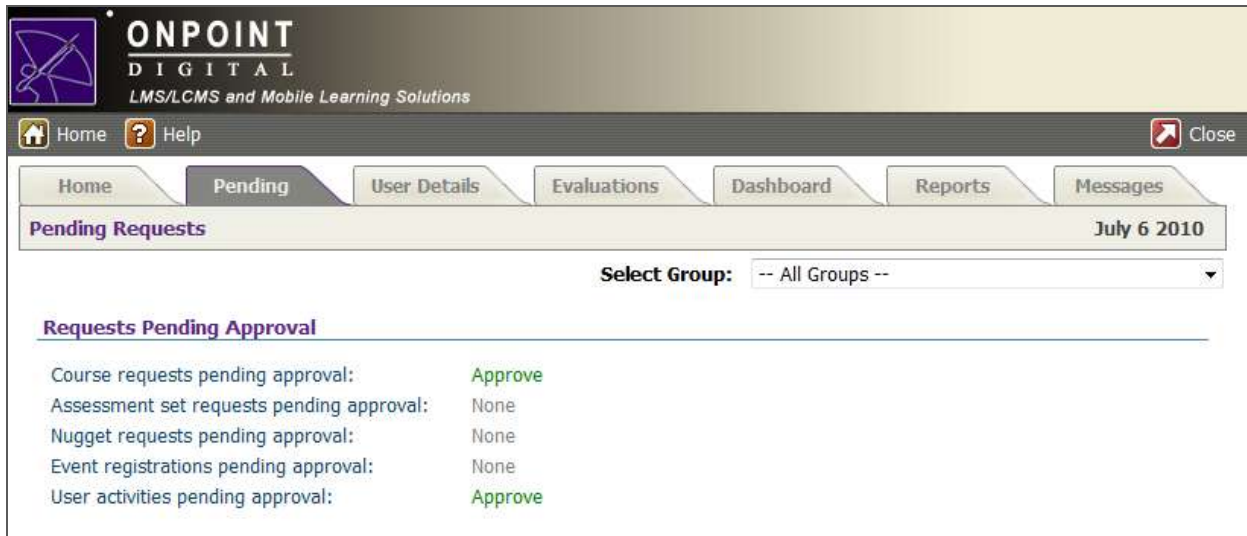


Figure 2-3 – Pending Requests by Assignment Type

Simply click on the link to open the relevant screen. The associated page will appear, listing all pending user requests.

Approving Courses, Assessment Sets, Nuggets and Events

When you are addressing Courses, Assessment Sets, Nuggets, and Events, the options are to approve or deny that user the ability to take the requested assignment (see Figure 2-4 below).

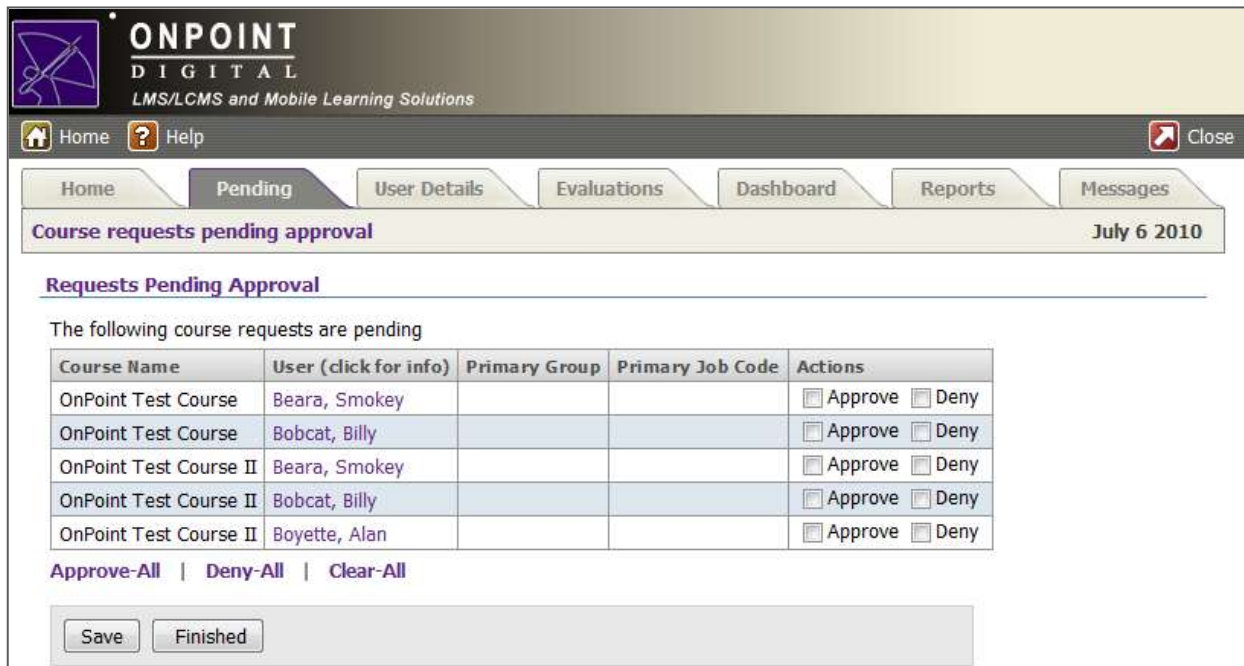


Figure 2-4 – Pending Course Assignment Requests

For Performance Managers who manage multiple groups, the pending list will be organized by Group, then alphabetically by Course title. Simply click the checkbox to Approve or Deny the request for a specific user, or use the **Approve-All** or **Deny-All** selections at the lower left. Click the **Save** button to save your actions, and the **Finished** button to return to the Pending Requests page.

Approving Activities

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Activities are assignments that typically involve something outside of the “online” environment, like attending a conference or completing some job shadowing. There are two types of Activities: Activities that do not require approval (honor system), and Activities that do require approval. In the latter case, for example, a user is assigned to attend CPR training downtown. Once they have attended the training, they must revisit the Activity assignment online and enter the date and time they attended the training. This entry must then be “approved” by their manager before the user is given a formal completion status for the Activity.

When a manager is reviewing their users’ pending Activities, the options are to approve the activity -- essentially marking it complete for the user, or to deny the request by marking the activity Not completed.

From the Pending tab, the manager clicks on the Approve link next to ‘User activities pending approval’ and a list of all Activities that need approval will display (see Figure 2-5 below).



Figure 2-5 –User Activities Pending Approval

Activities must be approved individually for each user. Use the Activity filter to narrow the list to a particular Activity, or the Last Name filter to narrow the list to a particular user. Click on the user name to open that user’s request (see Figure 2-6 below).

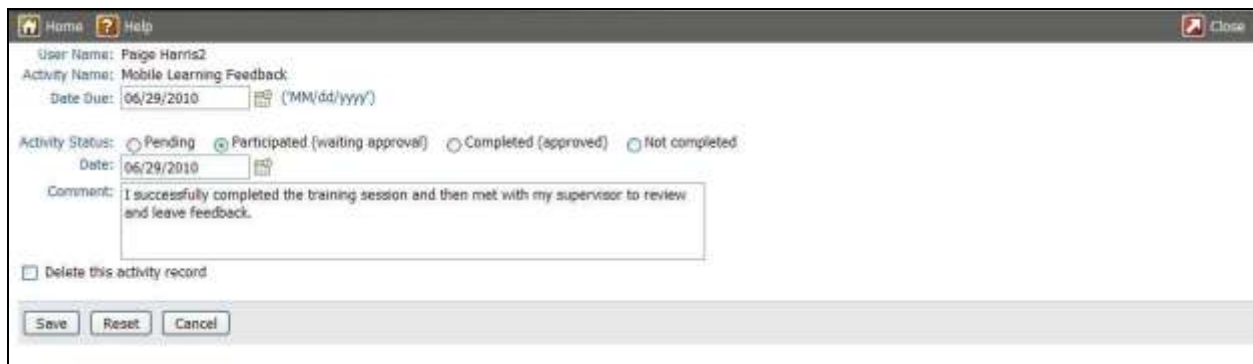


Figure 2-6 – Pending Activities Approval

Click one of the Activity Status radio buttons to mark the user from Pending or Participated (awaiting approval), to Completed or Not Completed. After making your changes click one of the following:

- **Save** – To save your changes.
- **Reset** – To clear your recent changes.
- **Cancel** - Returns you to the Activities Pending page without saving your changes.

2.3 User Details Tab

The Performance Manager interface allows you as a Manager to view the assignments and status of any user that is a member of a group you manage, or any user that falls under you hierarchically in an active Organizational Chart (see Section 3-2 of this Guide for more information on Org Charts).

When you click on the User Details tab, a table listing defaulting to the letter "A" will appear, listing all of the users that you manage or that fall under you in an Org Chart (see Figure 2-7 below). You may change this listing by using the A-Z Last Name filter by selecting a specific letter, or by clicking the **Filter** button just to the left for advanced filter options.

User ID	Filter (click to select)	User Login (click to email)	Title	Status
00032	AAUser, French	french	Test French User	Active
00636	B-H Demo, User	bh-demo@onpointlearning.com	Demo User for Brandon-Hall	Active
00326	Beara, Smokey	smokey	Forest Fire Prevention Expert	Active
00361	Bobcat, Billy	bbobcat	System Tester	Active
01027	Boyette, Alan	aboyette	Technical Support Manager	Active
00283	Boyette, Bonnie	bboyette	Instructional Designer	Active
01268	Brown, Charlie	cbrown	OnPoint Event Instructor	Active
01171	Ebel, Chad	cebel	Technical Support Representative	Active
00012	Gadd, Robert	robgadd@onpointdigital.com	Evaluator	Active
01176	Holliday, Bill	bholliday	VP, Professional Services	Active
00496	Howe, Gordie	gordie	Network Administrator	Active
00451	Kent, Clark	Superman	Newspaper Reporter	Active
01206	King, Ryan	rking		Active
00296	OnPoint, A TestUser	OnPoint Tester	Technical Support Manager	Active
00382	Sanchez, Heidi	hsanchez	Customer Relationship Manager	Active
00386	seed, pumkin	pumkin		Active
01142	Sopin, Ivan	isopin@onpointlearning.com		Active
00307	Taylor, James	jtaylor1		Active
00582	Westphal, Peter	pwestphal		Active

Figure 2-7 – Managed Users List

Once a user is selected, you will see a number of sub-tabs that allow you to see additional detail about that particular user, including assignments, test scores, etc. (see Figure 2-8 on the next page).

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The screenshot shows the 'User Details' page for user Harris, Paige. The page has a navigation bar with tabs: Home, Pending, User Details (selected), Evaluations, Dashboard, Reports, and Messages. Below the navigation bar, the user's name 'Harris, Paige' and the date 'July 6 2010' are displayed. A secondary navigation bar contains tabs for: User Information (selected), Assignments, Memberships, Test Scores, Management, History, Notes, Performance, Mobile Profile, and Certifications. The main content area is divided into two columns. The left column lists user information: User ID: 1273, Name: Harris, Paige, Email: pharris@onpointlearning.com, Login ID: pharris, Title: Marketing Manager, Organization: OnPoint Demo Slice, Address: 200 Blue Fin Circle Suite 2, Time Zone: US/Eastern, System Role: Site Administrator, Country Code: 1 - US, Telephone: Work: 912.898.9202, Notifications: Preferred Language: English, Account Expires: Never, Status: Active. The right column lists instructor and employee information: Instructor: Y, Employee ID#: 55-1234, Department: Sales & Marketing, Date of Hire: 1/1/2007, Education Level: BA. At the bottom of the page, there are buttons for Edit, Refresh, List, Reset Password, Assignment Status, Competency Matrix, and Certificates. A footer at the bottom left indicates the page was created on Nov 18 2009 3:46 PM by Administrator, OnPoint, and updated on Jul 6 2010 3:09 PM by an administrator.

Figure 2-8 – Specific User Details

User Details subtabs include:

- **User Information** contains the User's contact and profile information down the left side of the screen. On the right, the first field is Instructor, which indicates whether the user is an Instructor in the organization. The following fields after Instructor include up to ten company-defined custom fields.

At the lower right of the page are buttons that display a User's Assignment Status, Competency Matrix and Certificates. The Assignment Status and Competency Matrix are screen-based reports that show the same overall information, except that the Assignment Status presents the detail by Assignment type (all Courses, followed by all Assessment Sets, etc.) and the Competency Matrix shows the detail by Skill Profile. The Certificates button displays a screen-based report of all of a user's earned certificates. A manager can view and print any earned certificates for a user from this report.

- **Assignments** shows what the User has been assigned to complete, including Courses, Assessment Sets (standalone tests), Nuggets (short-form content), Events (Instructor-Led training and Webinars), Activities, and Skill Profiles (groupings of assignments that form Learning Paths). Clicking on a Status other than Not Attempted will display a Time Analysis for that item.
- **Memberships** shows all the User's Group Memberships and Job Code Assignments.
- **Test Scores** shows all the User's test scores.
- **History** displays any completed assignments that have been archived. You can also view the User's Module Access at the bottom of this screen. The History link shows each system module the user has accessed, and the most recent access date.
- **Notes** allows the manager to enter a note about the user.
- **Mobile Profile** shows the User's mobile information, including any detail available regarding cell phone device type(s) and cellphone numbers.
- **Certifications** lists external certifications earned by the user that the organization wants tracked within the LMS or CellCast platform. Certifications are imported into the Course Manager

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application, and only appear to Performance Managers for viewing. Edits must be made within the Course Manager application.

Performance Managers may also see a **Reset Password** button on the lower action line which allows them to reset a user's password if that function has been activated in OPPM for their role.

Making Assignments

Course Authors and Administrators access OnPoint's Course Manager application to make assignments manually to Learners/Users, or assignments are made automatically via regular imports or data feeds. Most organizations have their training departments manage assignments to users. However, in certain cases an organization may want to allow Performance Managers to also make assignments directly to their specific users. This is particularly the case if the company is maintaining open catalogs of content from which the users have free access to, rather than making direct assignments of things to every user. In this case, it can be up to the Performance Managers to make assignments or to manage assignment requests from their users. The ability to assign content to a user is the main difference between a Reporting Manager and a Group Manager.

If you are a Reporting Manager, you may view any detail about the user, but you cannot make assignments to users and you cannot edit, add or delete users from the system. If you are a Group Manager, you may make assignments to users, edit their profiles, add/change group memberships, etc. You may also add new users to the system if that function has been enabled on your server.

Notice on the User Details - Assignments subtab, that Group Managers will see an interface with **Assign** links to the right of each assignable object class, and will also see an **Edit** button at the lower left of the page (see Figure 2-9 below).



Figure 2-9 – Assign Link

Click the Assign link to the right of the object class (e.g. Course, Assessment Set, Nugget). A page will open listing all available items of that type not already assigned to the user (see Figure 2-10 on the next page).

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Home Pending **User Details** Evaluations Dashboard Reports Messages

Course Assignments July 6 2010

Name : Harris, Paige

Finished Use the Filter to populate available Courses on the right; click the checkbox to mark Courses to Un-assign or Assign; click the Transfer button. Click the Finished button to Exit this screen.

Assigned Courses (click to remove)

- 101 - Proliance
- BBS Sales Field Training Test
- Bell Sample Course
- BWyze SCORM Test
- Closing Skills
- CRM System
- JB Training
- Knife Handling Demo Course (Brandon-Hall)
- OnPoint Test Course
- Overcoming Objectives
- Telephone Skills
- Time Management

<<Transfer>>

Available Courses (click to assign) Filter

- filtered list -

- Charity Test
- OnPoint Test Course II

Figure 2-10 – Assignments

Course assignments are selected by clicking the checkbox next to the desired course(s) from the right-hand column (it is possible to assign more than one Course at a time). Click the **Transfer** button to commit the assignments. Click the **Finished** button at the top left to return to the Assignments sub-tab screen.

For environments with multitudes of available Courses, a **Filter** button is available at the top right of the available courses list that can help you narrow down the available list of items to select from.

2.4 Reports Tab

OnPoint's Course Manager application houses over 130 standard reports that can be run by Authors and System Administrators. Any of these standard reports can be flagged as available to managers via the Performance Manager application as well. These flags are set by a Site or Root-level Administrator in Course Manager, under the Administration tab. The settings are typically made during the system setup and implementation process for new systems, though they can be updated at any time as requirements dictate.

Because there are so many Standard reports, most organizations carefully select which reports will be made available to Performance Managers. It is typical to see only the key reports deemed most useful to those managers be turned on for OPPM access (see Figure 2-11 on the next page).

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Home		Pending		User Details		Evaluations		Dashboard		Reports		Messages	
Paige Harris											July 6 2010		
REPORTS													
												Display: Show All	
Report	Description												
Assessment Set Feedback Detail XXX	View detail of Feedback forms as part of an Assessment Set												
Assignment Progress Time Analysis	Assignment Progress Time Analysis												
CellCast Call Detail Report Summary	CellCast Call Detail Report Summary												
Course Feedback Detail	Course feedback detail												
Nugget List	List of defined nuggets												
Nugget Progress	Nugget Progress												
Nugget Progress (Chart)													
Nugget Time Analysis	Analysis of the time user/learners spend on each page of a selected course (or courses)												
Skill Profile Detail	Skill Profile detail - test data												
Skill Profile Progress (Chart)	Graphic skill profile progress report												
Skill Profile Progress Summary	Skill profile progress by user												
Test Answer Analysis	Analysis of questions and answers for a specific Test												
Test List	List of all defined tests												
Test Scores by Course	List of test scores filtered by course												
Test Scores by Group	List of test scores filtered by specified group												
User Course Status by Group	List of users and their course progress, filtered by Group												
User/Learner List	List of defined users and learners												
User/Learner List by Group	List of defined Users and Learners, filtered by Group												
User/Learner List by Last Login	User/Learner list, filtered by last portal login date.												

Figure 2-11 – Standard Reports

OnPoint's reports are designed to be extremely flexible, with numerous filters that can be selected to get just the data required. There are also various associated output field selections that can be made, so that the data included is what is desired. And all reports can be viewed onscreen, printed, or output to Excel or PDF formats.

To accommodate the Performance Manager application, all reports have been developed to include group-level security so that only those records that are permitted under the established group-based management matrix or organizational chart hierarchy will display to the requesting Performance Manager.

2.5 Dashboard Tab

A number of OnPoint's standard reports also feature graphical representations of presented data (% completes, % pass vs. fail, etc.) which help managers to spot issues and trends. To provide a designated area where managers could look to for this type of on-the-spot reporting, OnPoint created a separate Dashboard tab (see Figure 2-12 on the next page) to display real-time user status based on the various system assignment types, including:

Object Class	LMS	CellCast
Skill Profiles	✓	✓
Courses	✓	✓
Assessment Sets	✓	
Nuggets	✓	✓
Events	✓	
Activities	✓	

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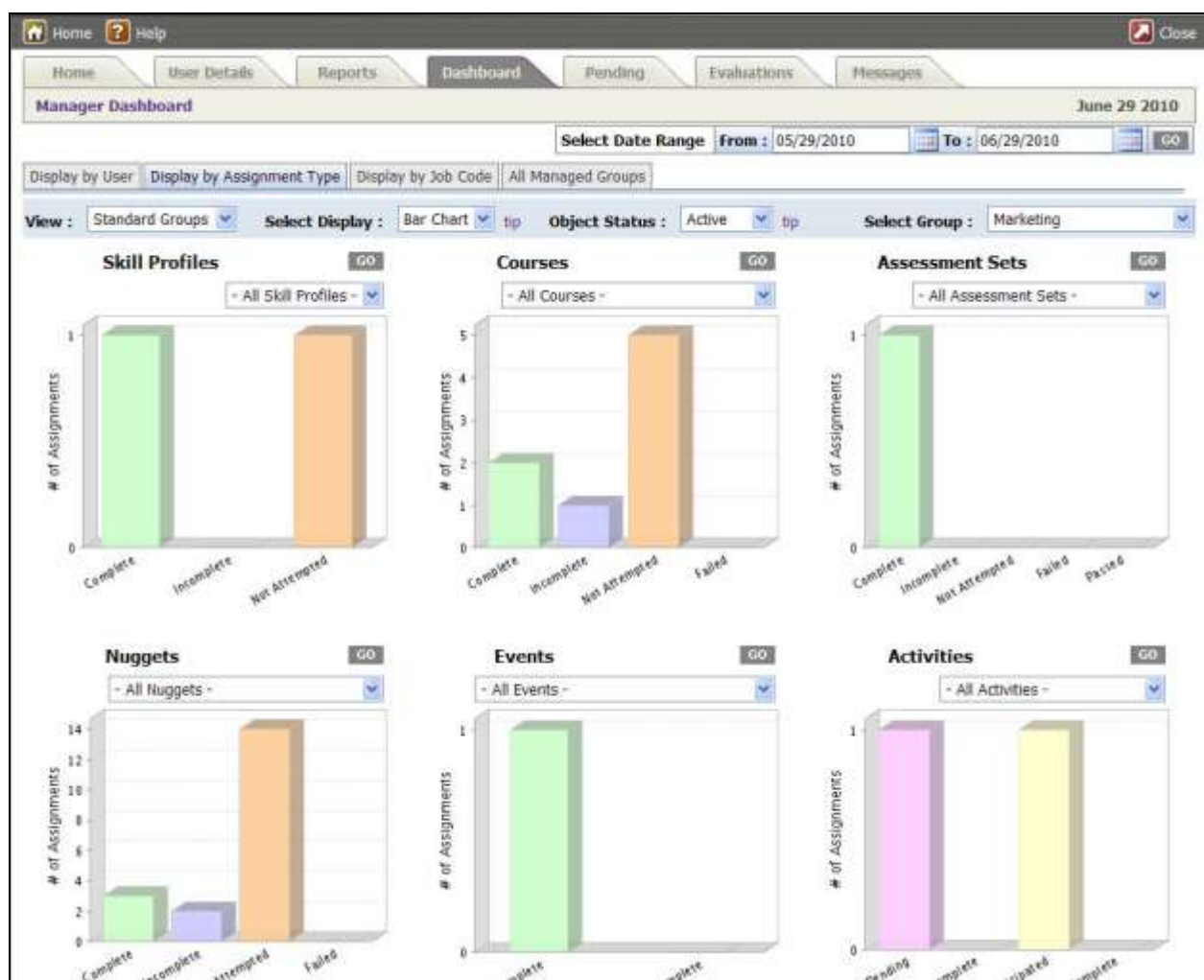


Figure 2-12 – Dashboard – Display by Assignment Type

The Dashboard display is easily customized to turn off any assignment types not being utilized by the customer (see [Section 3](#) of this guide for more detail on customizing OPPM).

The first Performance Manager Dashboard chart is by Skill Profile. Skill Profiles are collections of assignments that can be of various types. For example, an orientation skill profile might include a course covering company policies, a nugget on timekeeping, and a nugget on expense reporting. Skill Profiles allow managers to easily and quickly determine those who have completed a particular set of assignments, and those who have not – with drill down capability to reach underlying specifics by user, date range, etc. There are also a number of standard reports that include some very specific time analysis detail for customers who need to pay personnel based on completed assignments. These can be turned on in the OPPM application and accessible to Performance Managers via the Reports tab.

The other five dashboard areas report on a specific assignment type (e.g. Course, Assessment Set, etc.) rather than a combined set of assignments. This allows the manager to select 'All' assignments of that type, or select one specific assignment of that type to get detailed information about.

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Additional Report Views

The Dashboard supports alternative “views” of the information, including:

- Display by User
- Display by Assignment Type (default view)
- Display by Job Code
- All Managed Groups

See Figures 2-13 to 2-15 for examples of alternative views.

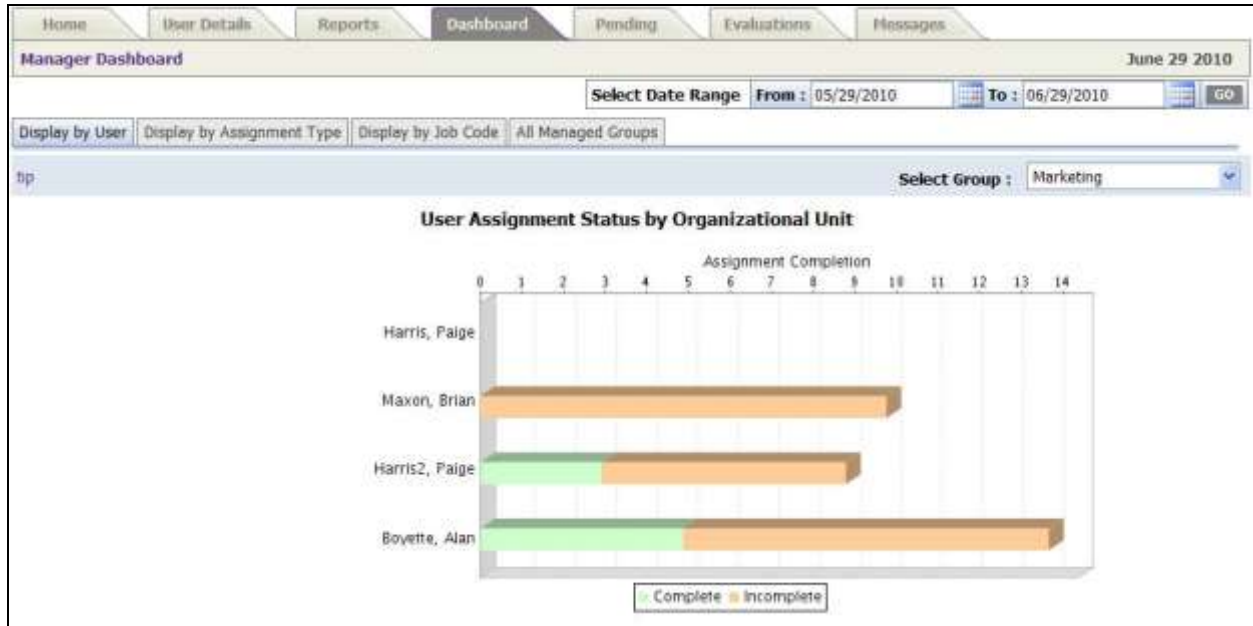


Figure 2-13 – Dashboard – Display by User

This view provides user assignment detail and completion detail: number of assignments for each user, and which are completed and incomplete.

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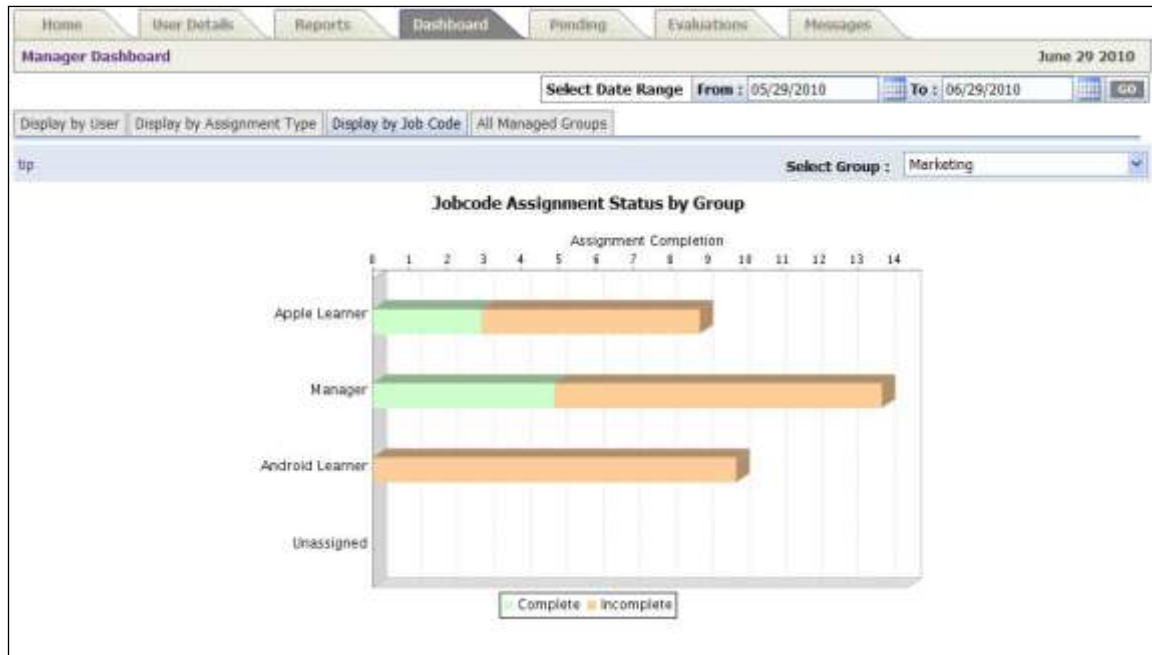


Figure 2-14 – Dashboard – Display by Job Code

This view provides total assignments by job code, including number of assignments and completion detail.

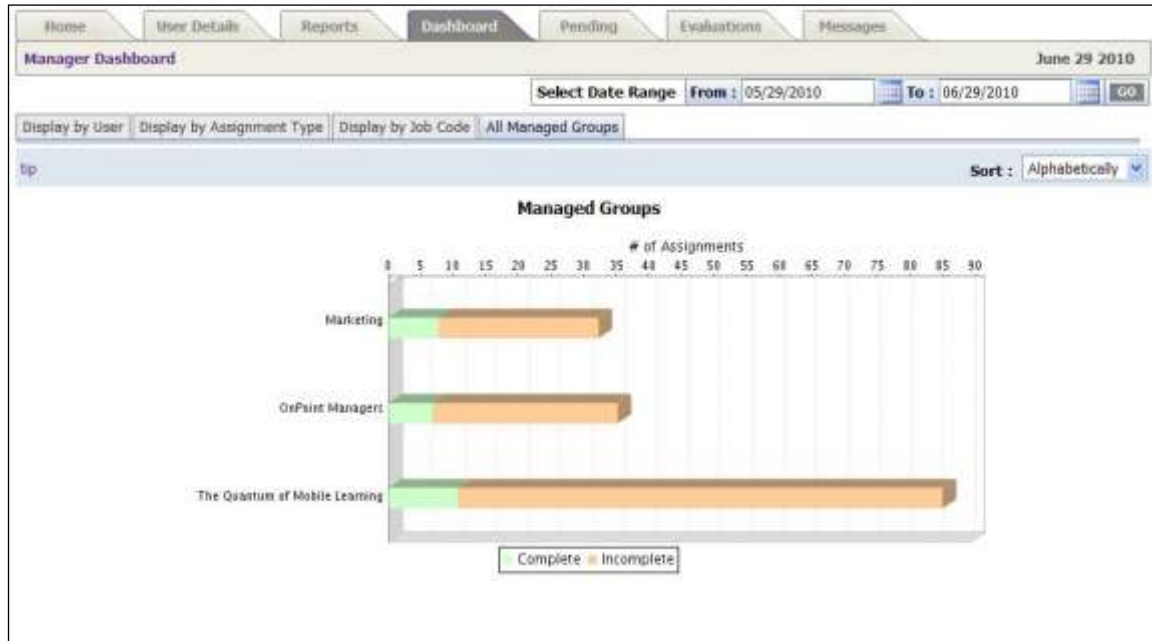


Figure 2-15 – Dashboard – All Managed Groups

This view lists all groups that the Performance Manager is set up to manage. The number of assignments is calculated across all users who are members of the listed group. The data is sorted either Alphabetically (the default) or By Completion. The purpose is to enable the manager to compare the rate of completion between managed groups.

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Group Selectors

Remember that the OPPM application will only make groups available to the manager that he/she has management rights over. Performance Managers will use the drop-down list of groups to select the group they wish to report on (see Figure 2-16 below).

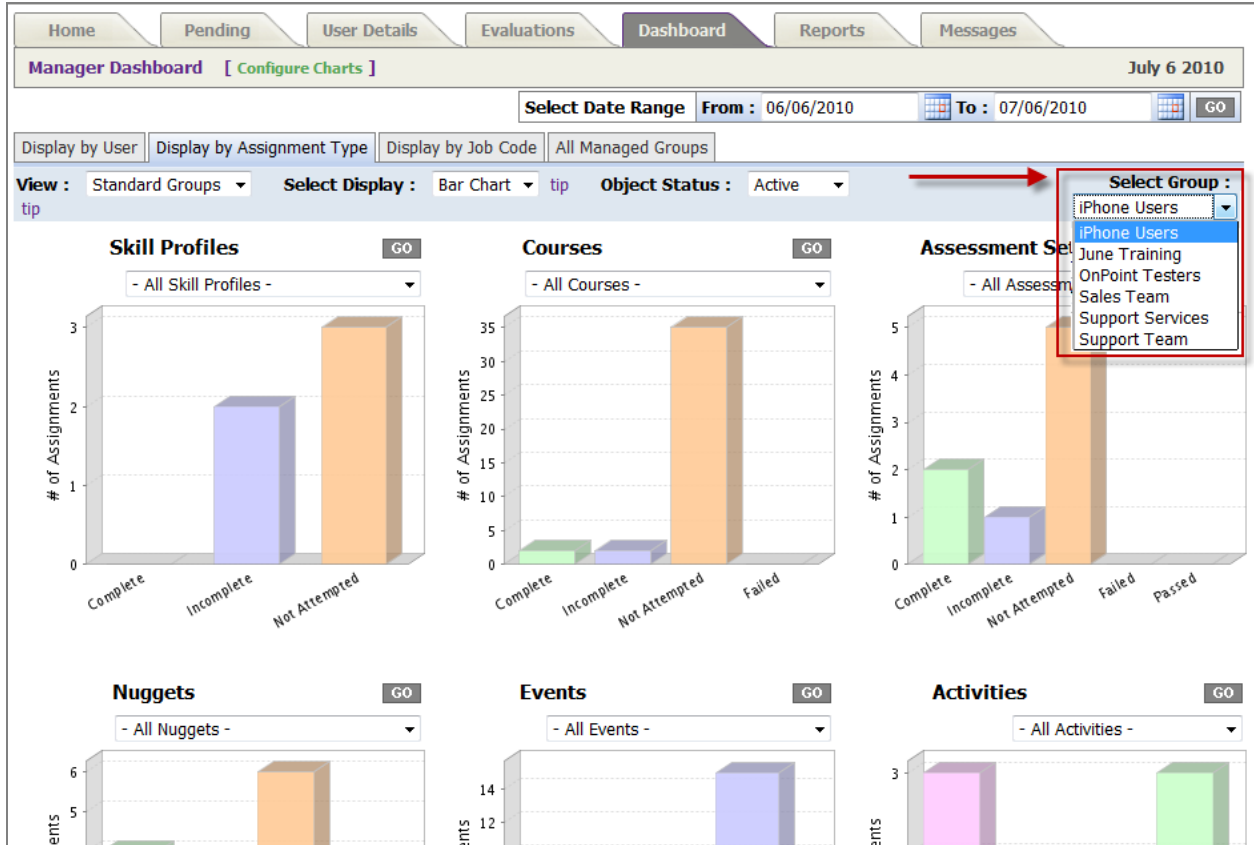


Figure 2-16 – Dashboard – Managed Groups Drop-down

Date Filters & System Performance

The OPPM Dashboard page auto-filters on a time period of the last 30 days (see Figure 2-17 on the next page). This filter affects all the real-time charts of the dashboard display; running the dashboard is equivalent to running 3-6 reports simultaneous. Depending on the number of users on the platform, this can represent a lot of system processing per manager.

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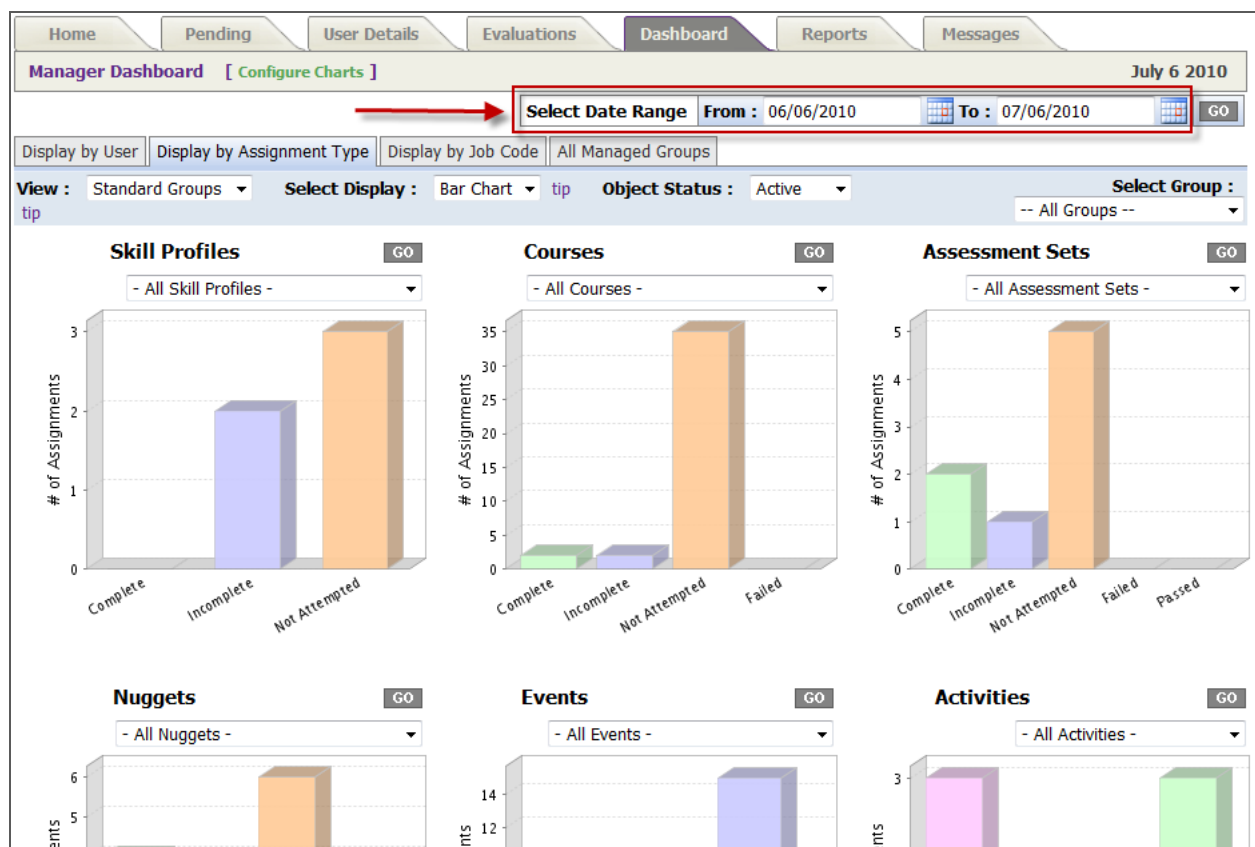


Figure 2-17 – Dashboard – Date Filter

The best practices, therefore, are as follows: if you know you want to report on a specific assignment item or user, select that criterion first and then choose your date filter range. That way, the system is only processing one report for the date period selected, rather than multiple reports, and system performance is not impacted.

2.6 Evaluations Tab

Authors and Administrators create tests in the OnPoint Course Manager application that can take one of four forms, including:

- Test – typically graded for the user, and grade is recorded in their record
- Quiz – can be graded for the user, but grade is not recorded in their record
- Appraisal – non-graded; completed by a Performance Manager
- Feedback Form – non-graded; completed by a User or a Performance Manager

The Performance Manager application provides a function that allows Appraisals and Feedback Forms to be completed by a manager on behalf of any user who reports to them. Managers can easily access and complete online evaluations (e.g. performance reviews, appraisals, exit interviews, etc.) for their users. These actions may be confidential depending on how the test was created in the system. For example, it is possible to record the results of a manager's appraisal of a user, in the User's record, but not have that appraisal be viewable by the user.

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Step 1 – Select Assessment

Completing an evaluation is a 3-step process. To begin, simply click the name of the Assessment you wish to complete for a User (see Figure 2-18 below). Assessments are organized by Category to help you locate the right assessment; use the **Filter** button in the upper right to narrow the list of choices.

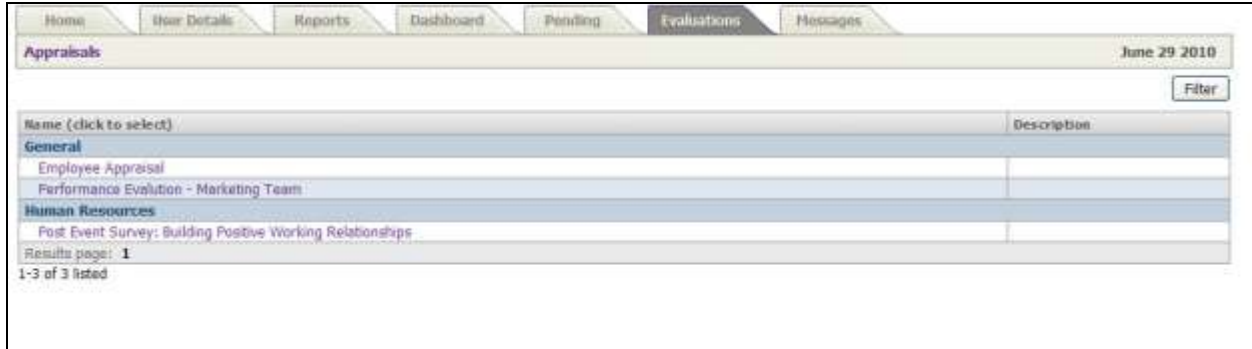


Figure 2-18 – Evaluations: Step 1 – Select Assessment

Step 2 – Select User

Once you have selected the Assessment you want to complete, you need to select the User who you will be evaluating (see Figure 2-19 below). Using the Last Name filter, click the first letter of the last name of the User you would like to review. To further narrow your search, click the **Filter** button for advanced searching.

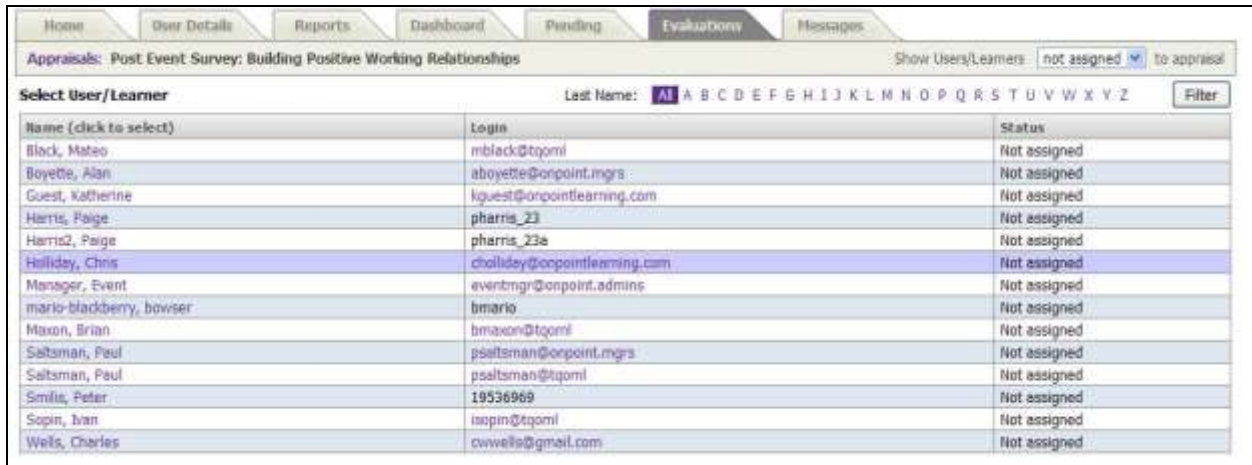


Figure 2-19 – Evaluations: Step 2 – Select User

Step 3 – Complete Assessment

Click on the User's Name link and the Assessment will open (see Figure 2-20 on the next page). Complete the assessment just as you would complete any online test within the LMS or CellCast-OPWM online platforms. Click the **Start** button (or the **Resume Assessment** button if you have previously started the test) to begin; complete the questions, then click the **Finish Test** button at the bottom when you are finished.

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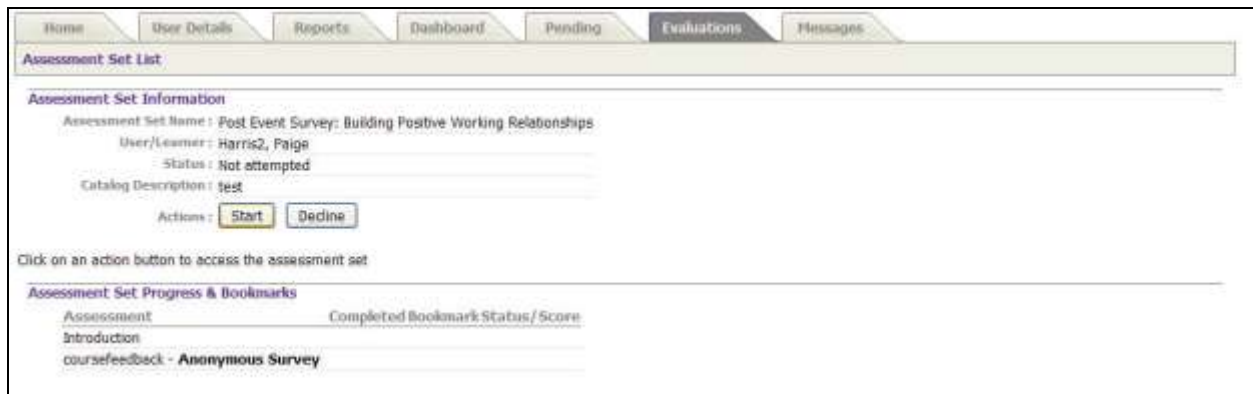


Figure 2-20 – Evaluations: Step 3 – Complete Assessment

The results will be stored in the User's record. Appraisals that are set to only be filled out in OPPM are not viewable by a user in their record.

2.7 Test Results Tab

[Note: The Test Results tab is a new area of functionality that is currently being coded and perfected. It is not 100% yet, so you may want to disable the tab until the feature is completed.]

The intent of the Test Results tab is to allow Performance Managers to view graded question answer detail across their user community (see Figure 2-21 below). Simply select a Test from the drop-down and the question list will appear for that test. You may then click on any True/False or Multiple Choice/Single Answer question to see a graphical display of responses to that question. The report can also be filtered by Group.

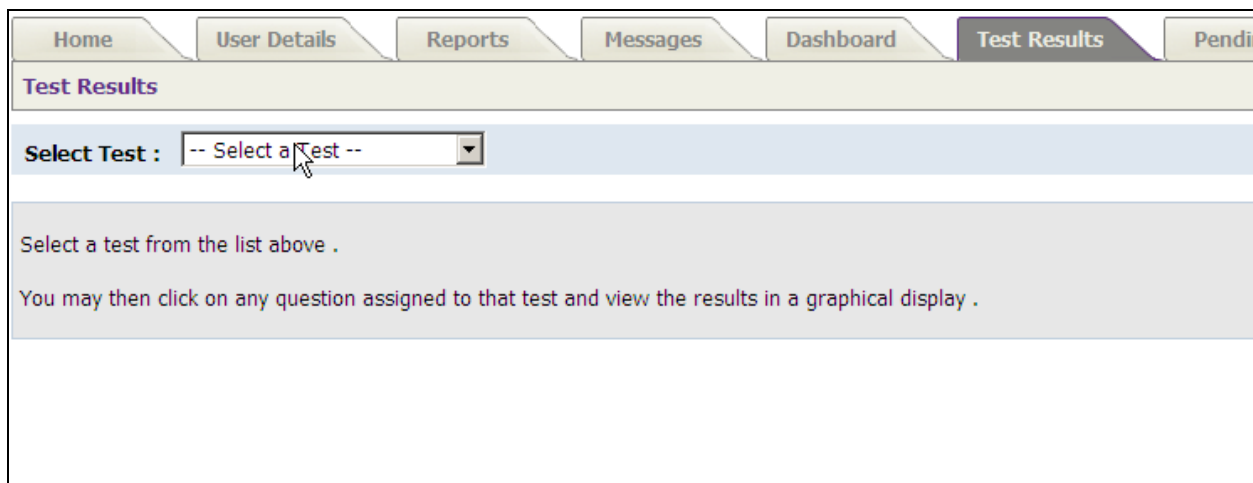


Figure 2-21 – Test Results: Step 1 – Select Test

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Figure 2-22 – Test Results: Step 2 – Select Question

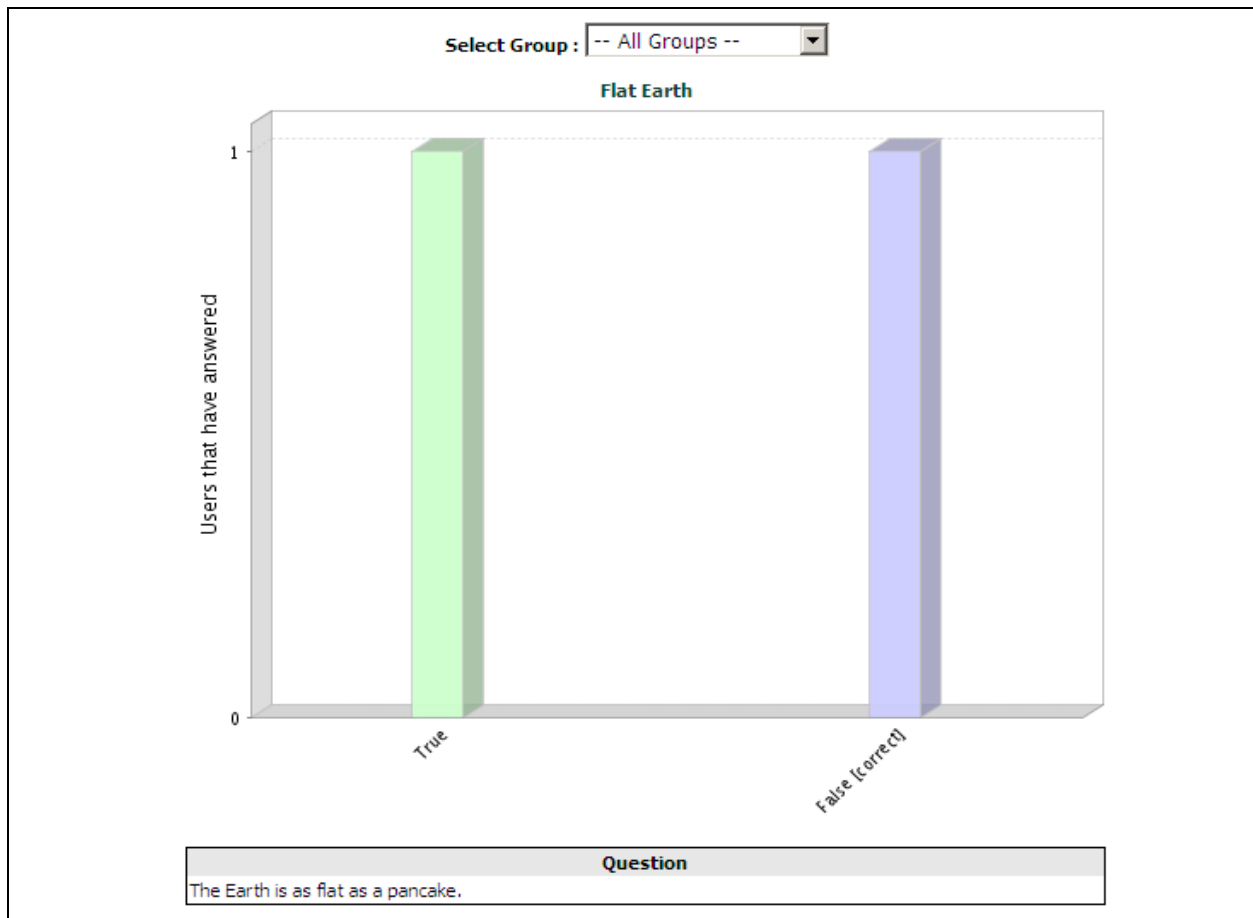


Figure 2-23 – Test Results: Step 3 – View Answer Stats

2.8 Messages Tab

The purpose of the Messages tab is to allow Performance Managers the ability to review and monitor Announcements sent to groups of users they manage (see Figure 2-24 below).

This may be of interest to managers, especially if they are not actually members of those groups. For example, if the manager is a VP of Sales, he/she may manage one or more groups such as the Sales Representatives – Southeast and the Sales Representatives – Southwest groups. It is not likely that the manager would be a member of either of these groups. Therefore, Announcements sent to those groups would not be routed to the VP. This tab allows all appropriate group-based announcements to be viewed by the manager.

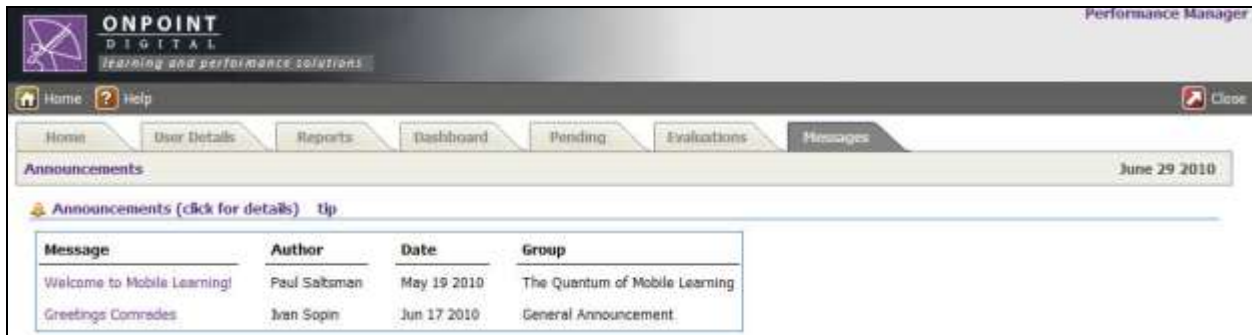


Figure 2-24 – Messages Tab

3.0 Configuration Options

There are a number of decisions to be made by the organization when setting up the Performance Manager application. The key decision areas include:

- 1) Assigning Manager roles (Reporting Manager or Group Manager)
- 2) Whether you will use a group-based management structure or a hierarchical structure based on a maintained organizational chart
- 3) System Administration settings that govern how the system operates, defaults, etc.
- 4) OPPM interface branding and tab selections
- 5) Localization and taxonomy

This section will assist you in making these decisions so that the application is configured as appropriate for your environment.

3.1 Creating Performance Managers in OPCM

The OnPoint system supports a number of different User and Manager roles which govern access and use of the system (see Figure 3-1 below). The following provides a listing and description of each of the defined roles. The quantity of licenses purchased by the customer will determine the number of available seats in each role. Administrators can create new Performance Manager accounts provided there are sufficient Performance Manager licensed seats available.

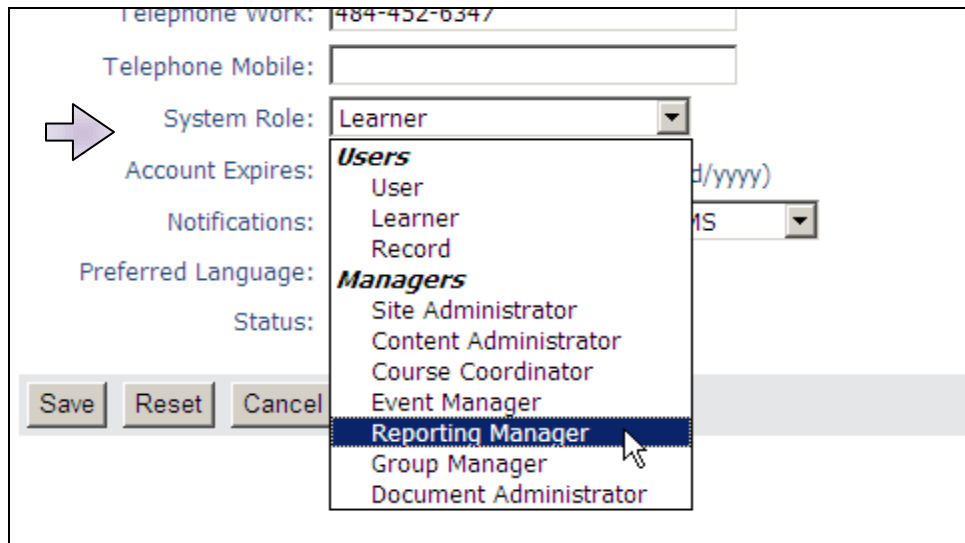


Figure 3-1 – System Roles

Defined roles include:

System Roles (Users):

The assigned level of the User. Select from the following:

- **User Role (Level 3)** – The most commonly used system role; permits the defined User to access the Portal and Content Viewer and provides open access and navigation to all non-restricted learning and development materials.
- **Learner Role (Level 2)** – The second most commonly used system role; permits the defined Learner to access the Portal and Content Viewer; provides open access to all non-restricted learning and development materials, but restricts

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navigation to linear paths only.

Note: For example, “Learners” must progress through an assigned Course sequentially (Page 1 followed by Page 2) whereas “Users” may jump around within a Course as they desire and review pages in any order they choose.

- **Record Role** (Level 1) – Record-level roles are the lowest level role and are designed for recordkeeping purposes only. They allow organizations to maintain online histories of personnel that no longer have access to the OnPoint Content Viewer or Portal to take Courses, Assessments, etc. Record-level seats are most commonly used to archive the system histories of User-level and Learner-level accounts when they leave the organization. Record-level seats are more cost effective than User and Learner-level seats; once a user’s status is changed to a “Record”, the user license seat is freed up to be re-used for a new Active User.

System Roles (Administrators):

The assignable levels for Administrators and Managers. Select from the following:

- **Root Administrator** (Level 7) – Root-level accounts have the highest level of access and system rights; they permit viewing and management of server “slices” to support multiple customer database instances (this selection will display only to other Root-level Administrators). Personnel with Root-level accounts can also be assigned to courseware and other standard system services.
- **Site Administrator** (Level 6) – Site Administrator-level accounts have full system rights to the select server slice they are assigned to. Personnel with Site Admin-level accounts can also be assigned to courseware and other standard system services.
- **Content Administrator** (Level 5) – These accounts permit access to most slice features including deletion tasks but exclude Site/System-related configuration menus and utilities.
- **Course Coordinator** (Level 4) – In addition to full User-level capabilities, personnel with Course Coordinator-level system roles have the ability to design and edit Courses and Assessments and make assignments to other personnel.
- **Event Manager** (Level 4) – Ability to schedule and edit event calendars only.
- **Group Manager** (Level 4) - In addition to full User-level capabilities, personnel with Group Manager-level system roles have the ability to access progress summaries and histories for all members of their department or Group using OnPoint Performance Manager (“OPPM”) application. Via OPPM, Group Managers can view information, generate reports, make user level assignments to those members within their group (s), and create new users through the OPPM interface if the function is enabled. Users created by a Group Manager are automatically assigned to the group the Group Manager manages.
- **Reporting Manager** (Level 4) - In addition to full User-level capabilities, personnel with Reporting Manager-level system roles have the ability to access progress summaries and histories for all members of their department or Group using OnPoint Performance Manager (“OPPM”) application. Via OPPM, Reporting Managers can view information and generate reports but they cannot make assignments or add new users.
- **Document Administrator** (Level 5) - In addition to full User-level capabilities, personnel with Course Coordinator-level system roles has the ability to edit and maintain Document Manager (OPDOC) menus and administration. This level of administrator has Root level access to the OPDOC, for the purpose of creating

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menu systems, setting up preferences, and determining security for menus and docs within the group Document Manager instance they are assigned to manage.

Promoting a User to a Performance Manager

Any Learner/User in the system can be promoted to Performance Manager status as long as there are available Performance Manager licenses available. **Note:** you must be a higher level administrator to add a new manager, or promote a user to manager status.

To Edit a User record, select the user you wish to edit from the list of **Users & Groups: Users & Managers** by clicking on the User Name link highlighted in purple. The User record will display. Click the **Edit** button at the lower left to open the edit screen, and change the user's Role selection to either Reporting Manager or Group Manager. Click the **Save** button to save your changes.

Assigning Managed Groups to a Performance Manager

If the organization will be using a group-based reporting structure (see more on this in Section 3.2), each manager needs to have the groups they will manage “assigned” to them under the **Management** subtab (see Figure 3-2 below).

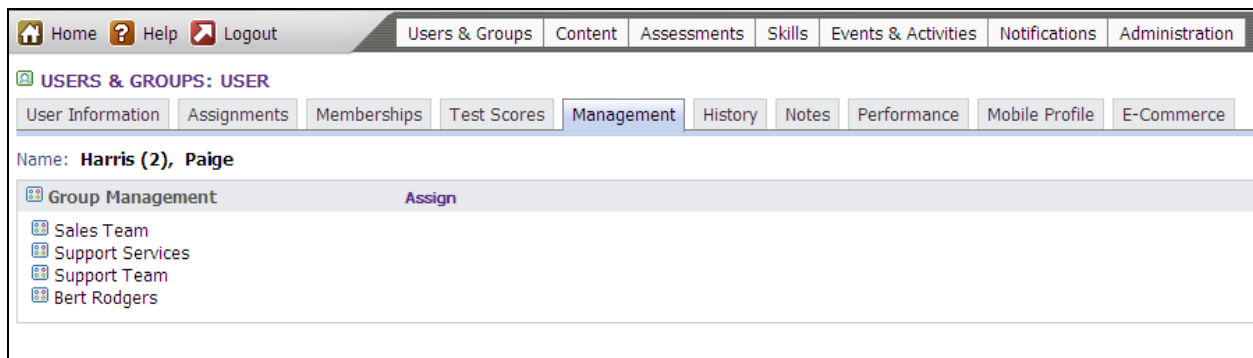


Figure 3-2 –Management Subtab

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To perform these assignments manually, simply open the manager's record and select the **Management** subtab; click the **Assign** link to the right of the Group Management heading and the list of available groups will display (see Figure 3-3 below).

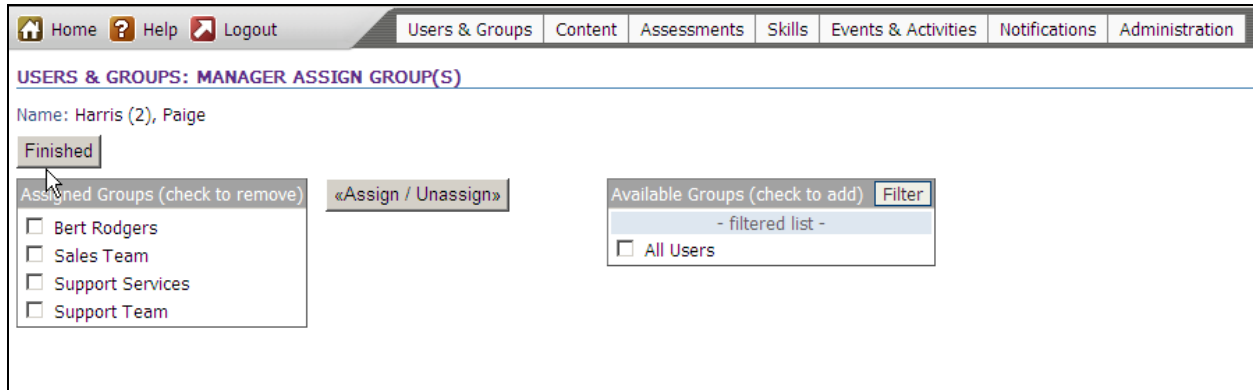


Figure 3-3 – Assigning Group Management

Select any available groups from the column on the right, using the Filter to narrow down your list if necessary. More than one group can be selected at a time. Click the **Assign / Unassign** button to make the assignments, then click the **Finished** button to return to the Management subtab page.

Manual assignments are always available to an Administrator, however most systems are configured for an automated data feed or nightly import to handle adds/updates so that users who are also managers are automatically setup based on any number of business rules guiding the establishment of that user in the system.

3.2 Groups vs Organizational Charts

The Performance Manager application can provide management views of users and data based on either a group-based management structure or an organizational chart hierarchy. If the system is group-based, groups are created in the system and each manager is assigned to manager one or multiple groups. In OPPM, the manager will only see the users who are members of those groups that he/she has been assigned to manage.

If the organization has an org chart reporting hierarchy, the org chart is created in the OnPoint system, and no group-based assignments are necessary. Each manager will be able to see the users who report under them in the hierarchy, regardless of what groups those users belong to (see Figure 3-4 on the next page for a sample system org chart).

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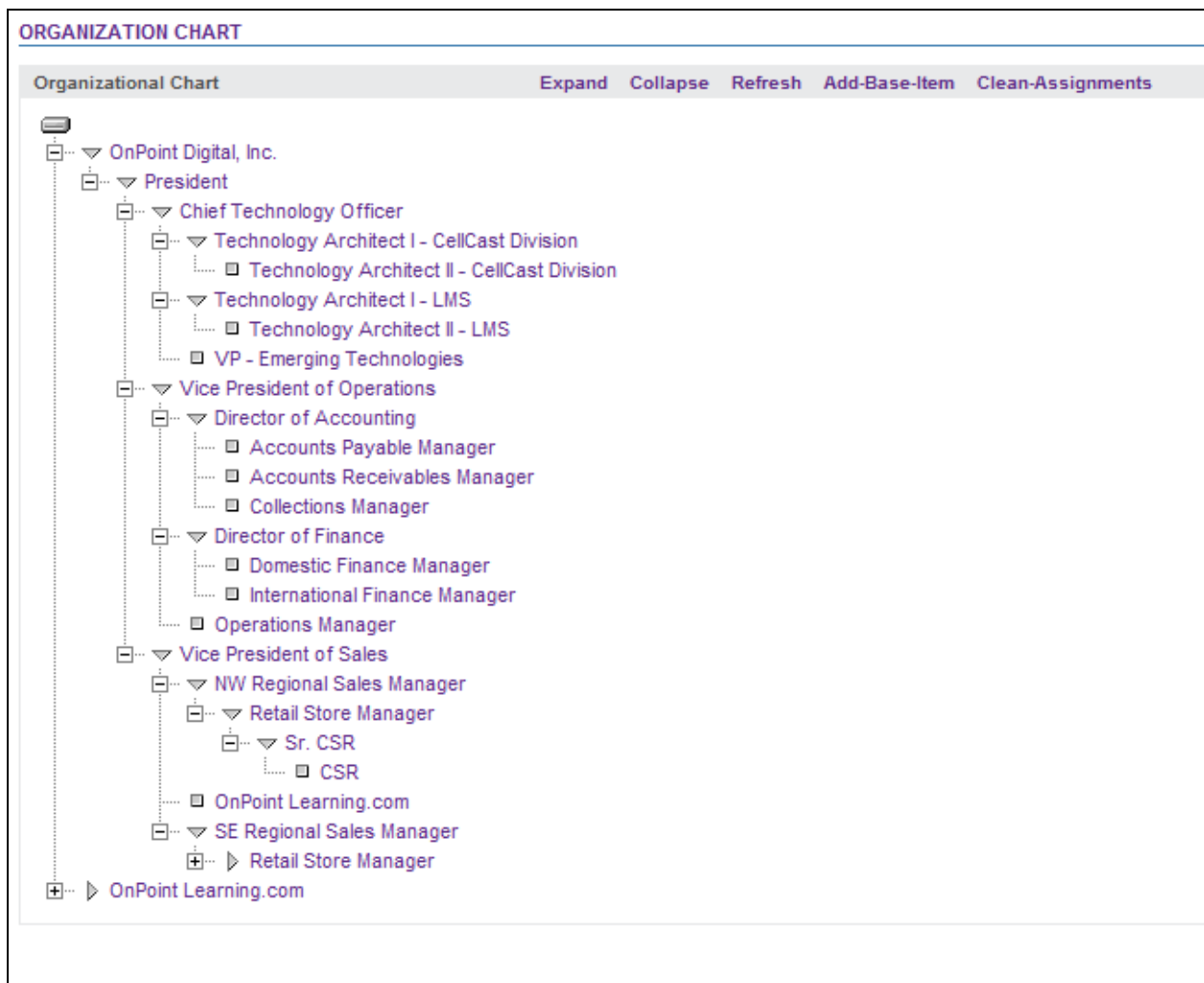


Figure 3-4 – Sample Org Chart

Some organizations actually utilize both of these structures, allowing certain groups to be established, assigned and reported on for mid-tier management, and a higher tier view within the OPPM application is setup for Regional Managers to oversee multiple managers and their staffs. In this case, the Performance Manager has the option to view data by selecting Group or Org Chart (see Figure 3-5 on the next page).



Figure 3-5 – View Data by Group or Org Chart

Considerations

There are several benefits to the group-based approach, including the multitude of standard reports that are available in the OnPoint system by group. There are fewer standard reports available that report by hierarchical level as this approach is newer and used by far fewer customers. Also, customers will be utilizing groups throughout the system to make assignments to users, so groups will already exist in the system. And though assignments can be made by group, job code, or location, they cannot be assigned to an org chart level. Finally, it is important that the organization have an up-to-date and valid org chart that can be either imported or auto generated on a regular basis in order for the org chart approach to be successful.

All of these are considerations to be carefully weighed as you determine how you will utilize OPDM.

3.3 Administration Settings

There are several configuration items defined in the OnPoint Course Manager under the Administration tab that are utilized by the Performance Manager application (see Figure 3-6 on the next page). These configuration items are defined here.

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No.	Name (click to edit)	Assigned Value
1	Default Password	
2	Group Manager Add Users	Y
3	Group Managers can reset passwords.	Y
4	OPPM Help URL	/oppm/pages/help/help.jsp
5	Reporting Managers can reset passwords.	Y
6	Show Org chart in Performance Manager	Y

[Clear cache](#) | [Add Default Values](#) | [Mandatory User Information](#)

Figure 3-6 – OPPM Configuration Settings

1. **Default Password** – Default password for auto reset in OPPM. Reporting Managers and Group Managers have the ability to reset a user’s password from the “Reset Password” button in the user’s record. Clicking this button will change that particular user’s password to the defined Default Password entered here.
2. **Group Manager Add Users** – This selection allows Group Managers to add new users.
3. **Group Managers can reset passwords** – This selection allows Group Managers to reset passwords. This provides the Reset password button used above to Group Managers.
4. **OPPM Help URL** – The application help URL to be accessed when the OPPM Help link is selected by a Manager.
5. **Reporting Managers can reset passwords** – This selection allows Reporting Managers to reset passwords. This provides the Reset password button used above to Reporting Managers.
6. **Show Org Chart in Performance Manager** – If an Organization Chart has been established, this setting can be set to “Yes” to allow managers of the various Org units to see and report on the levels that they manage. This adds the functionality of the Org Chart to the standard Group-based management functionality within OPPM.

Mandatory Field Inputs

When a Group Manager creates new users through OPPM, the required user fields can be pre-established to ensure a valid entry. The extra required fields of information in a user’s account are established in OnPoint’s Course Manager application, under Administration: Configuration – Performance Manager. Use the link at the bottom of the page called [Mandatory User Information](#). The link will open a pop-up where the fields can be selected (see Figure 3-7 on the next page). Click the **Save** button to save your selections.

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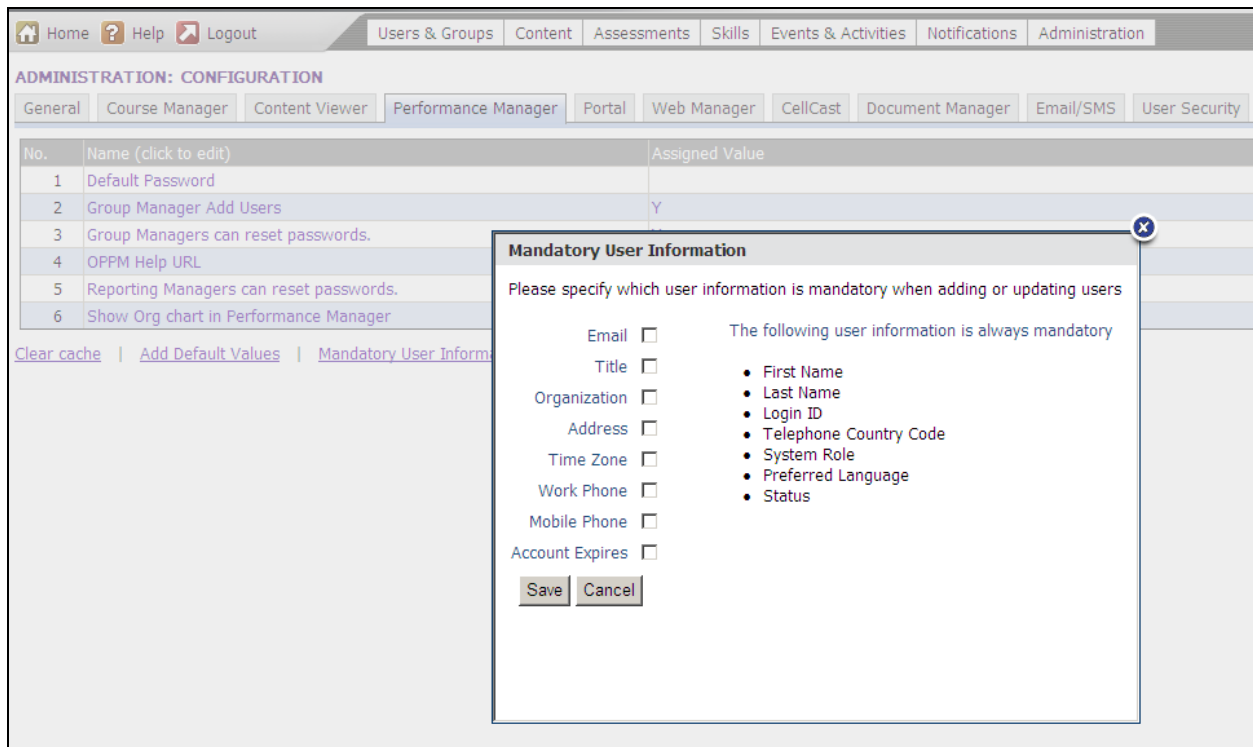


Figure 3-7 – OPPM Configuration Settings

3.4 Design Customizations

There are a number of design decisions available to customize the Performance Manager interface, including branding the banners, which tabs will be displayed, what they should be called, and so forth. Please see [Appendix B](#) for a sample Implementation Checklist.

At the time you are ready to implement the Performance Manager application, OnPoint's support team will work with you to review these decisions and assist you in gathering the details needed to begin the custom setup of the application. Updates can be made easily and quickly, so that set up typically takes only a few days to accomplish.

3.5 Localization & Taxonomy

OnPoint's Performance Manager ("OPPM") application supports an English language file, allowing each customer to customize the terms and messages used throughout the application where necessary. The application also currently supports 12 optional language modules, including Arabic, Cantonese, French, German, Italian, Japanese, Korean, Malay, Mandarin, Portuguese, Russian and Spanish.

Appendix A – Standard Help Paragraphs

The following are OnPoint's standard help paragraphs. These can be edited or deleted as desired by the customer.

Navigation

- **Home:**
The Home icon simply returns you to the Home tab or "landing" page of the Performance Manager application.
- **Help:**
The Help icon brings up this pop-up page providing more detail about each tab of the Performance Manager application and any information links that have been provided for view/download.
- **Logout:**
When you are finished using the Performance Manager application, click the Close icon in the upper right corner. The system will ask if you are sure you want to close. Click the OK button to end your Performance Manager session and return to the main portal page.

OPPM Overview

The Performance Manager application allows an organization's management staff to better manage the learning progress and performance outcomes of their direct reports. The interface is accessible from the Learning Center Portal, to managers with a role of "Reporting Manager" or "Group Manager." These roles allow you as the manager to view the assignments and status of all users who are members of a group you manage, or who report to you hierarchically according to an active organizational chart.

The Performance Manager interface is designed as a selection of tabs, each offering a unique capability as described in the options list shown at the left. Simply click on the various options to learn more about how the particular functionality may help you access the information you are seeking. More detail can be found in the Performance Manager Reference Guide PDF, accessed by clicking the link above.

Home Tab

The Home tab is the "landing" page of the Performance Manager interface. Here, Managers see their login id and role, the date of their last login, and any company message posted for managers. This message may include additional instructions for managers to follow.

User Details Tab

The Performance Manager interface allows you as a Manager to view the assignments and status of any user that is a member of a group you manage, or who reports to you according to an Org Chart hierarchy. A table listing defaulting to the letter "A" will appear, and you may change this listing by using the A-Z last name filter or by clicking the Filter button for advanced filter options. Once a user is selected, you will see a number of sub-tabs that allow you to see additional detail about that particular user, including assignments, test scores, etc. Buttons at the lower right allow you to view the user's Assignment Status and Competency Matrix. These two screen-based reports show the same overall information about the user, except that the Assignment Status presents the detail by Assignment type (all Courses, followed by all Assessment Sets, etc.) and the Competency Matrix shows the detail by Skill Profile.

If you are a "Reporting Manager" you may view any detail about the user. If you are a "Group Manager" you may also make assignments to the user by clicking the Assignments subtab and then clicking on the Assign link to the right of the object (e.g., Course, Assessment Set) to make a selection from the available list.

Dashboard Tab

The Dashboard displays a set of pre-defined reports in a graphical view based on the primary assignment types in the LMS, including Skill Profiles, Courses, Assessment Sets, Nuggets, Events and Activities. These can then be “drilled into” for more detail by simply clicking on the desired data column. In addition to Assignment Type, the Dashboard options include the ability to display results by User, by Job Code, and by All Managed Groups. Results can be viewed in bar chart or pie chart format. Detailed views allow for data export to CSV, Excel or PDF as desired.

Reports Tab

This tab provides a list of all reports that have been activated for Performance Managers to access. The list includes a brief description of each report. Simply click on the desired report link and enter any filter options, then run the report. Options for printing and exporting to Excel or PDF can be found in the gray bar at the top right of the resulting report.

Remember that with any Group-related filter choices, you will only see those groups in the drop-downs that you manage, and by association, only those personnel who are members of those groups will appear in the reports.

Pending Tab

The Pending tab allows Managers to process any pending ‘request for approval’ items for their group(s) of users. Managers can select the Group from the main Pending page in the top right and the display will show only those items for that group that need to be processed. Alternatively, the Manager may select the type of item he/she would like to process by clicking on any green “Approve” links from the Pending page to see outstanding requests that require approval.

Appendix B – OPPM Implementation Checklist

Co: Acme
 Janet Smith

Date Updated:
 Completion Target:

System Configuration - Performance Manager				Status	Priority	Resources	Notes
Done	Task Owner	Task Name					
		OP-Portal:					
<input checked="" type="checkbox"/>	Acme	Define OPPM Name for link on OP-Portal screen		Complete			
<input checked="" type="checkbox"/>	Acme	Confirm copyright has correct legal company name		Complete			
	OnPoint	Update OP-Portal interfaces and login screens as necessary		Complete			
		Banners:					
<input checked="" type="checkbox"/>	Acme	Define Default Banner(s) to Display in OPPM		Complete			
<input checked="" type="checkbox"/>	OnPoint	Create Default Banner(s) to Display in OPPM		Complete			
		Tabs:					
<input type="checkbox"/>	Acme	Define/Edit Welcome/Home Screen Message on Home Tab					
<input type="checkbox"/>	Acme	Choose which OPPM Tabs to Display or Hide:					
		- Pending Y / N					
		- User Details Y / N					
		- Evaluations Y / N					
		- Dashboard Y / N					
		- Reports Y / N					
		- Test Results Y / N					
		- Messages Y / N					
		- Tools Y / N					
<input type="checkbox"/>	Acme	Choose what order the above selected tabs will be displayed in					
<input type="checkbox"/>	Acme	Define any text edits to OPPM Tab Titles					
<input type="checkbox"/>	OnPoint	Make OPPM tab changes for display (Y/N), display order, and tab titles					
		Dashboard:					
<input type="checkbox"/>	Acme	Choose which Dashboard Charts to Display or Hide (6 available)					
		- Skill Profiles Y / N					
		- Courses Y / N					
		- Assessment Sets Y / N					
		- Nuggets Y / N					
		- Events Y / N					
		- Activities Y / N					
<input type="checkbox"/>	OnPoint	Make Dashboard display edits per above selections					
		Reports:					
<input type="checkbox"/>	Acme	Define Reports to Display on Reports Tab (set in OPCM Administration)					
<input type="checkbox"/>	Acme	Determine any Manager Custom Link(s) to be added to PM Portal Interface					
<input checked="" type="checkbox"/>	OnPoint	Localize OPPM Interface - (e.g. French, Spanish, etc.)					
		Tools:					
<input type="checkbox"/>	Q	Allow PM to change their password? (under Admin-Configuration)					

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<input type="checkbox"/>	Q	Allow PM to update personal info? (under Admin-Configuration)				
		Import & Access:				
<input type="checkbox"/>	Acme	Define list of Performance Managers				
<input type="checkbox"/>	Acme	Include their Role (Reporting Manager or Group Manager)				
<input type="checkbox"/>	Acme	Determine which Groups each Performance Manager will have Management authority over				
<input type="checkbox"/>	Q	Will PMs be imported initially via OPPM Import Spreadsheet? Y / N				
<input type="checkbox"/>	OnPoint	If Yes, OnPoint to perform spreadsheet import				
<input type="checkbox"/>	Q	Will PMs be auto-generated by updating the existing import? Y / N				
<input type="checkbox"/>	OnPoint	If Yes, OnPoint to draft SOW for updates needed to SSO/integration rules				
<input type="checkbox"/>	Acme	Define OPPM Manager Hierarchies; provide spreadsheet to OnPoint for review to determine if Org Chart can be auto-generated from data				
<input type="checkbox"/>	Q	Show Org Chart option in OPPM? Y / N (use space to add detail re programming for auto-generation of Org Chart)				
		Help:				
<input checked="" type="checkbox"/>	OnPoint	Establish OPPM Help URL Link in OPCM	Complete			
<input checked="" type="checkbox"/>	Acme	Customize OPPM Help Text (on-line) Paragraphs	Complete			
<input checked="" type="checkbox"/>	Acme	Select "Contact Us" link for login page, online help page or within any guides	Complete			
<input checked="" type="checkbox"/>	OnPoint	Update "Contact Us" links and update language file for any text edits	Complete			
	Acme	Write any localized (e.g. French) version of Help text above	Complete			
<input checked="" type="checkbox"/>	Acme	Customize OPPM Quick Start Guide (downloadable)	Complete			
<input checked="" type="checkbox"/>	Acme	Write localized version(s) of Quick Start Guide above	Complete			
<input type="checkbox"/>	Acme	Update Guides regarding access, based on any Single Sign-on				
		Capabilities:				
<input type="checkbox"/>	Q	Who Can Reset Passwords? (Group Mgrs, Reporting Mgrs, or Both)				
<input type="checkbox"/>	Q	Can Group Managers add Users? Y / N				