

Administrator's View

The Administrator are able to view the employee's career conversation in order to address any queries that the employee or manager might have. This is accessed through Manage Employees under Employee Development.

1. Manage Employees

- The administrator goes to Manage Employees and selects an employee whose career conversation he would like to view.
- Then under Employee Development he selects Career Conversation.

Figure 56: Employee Development

- The view that the Administrator now finds is the same as the employee (either a manager or employee).
- Different rights can be given on subgroup level which will allow an administrator to either only view or edit the employee's career conversation.

Figure 57: Administrative view of an employee's career conversation

2. Career Conversation Master Data

2.1. Periods

- New periods can be created. These periods can be specified per date. To create a new period, go to:

System Administration | Modules | Career Conversation | Master Data | Periods

Figure 58: Career Conversation Master Data - Periods

- Click on Create New Period

Figure 59: Create new Period

- The period details needs to be specified:
 - Period Name
 - Start Date
 - End Date
 - Enabled Status

Figure 60: Period Details

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- The newly created period will be displayed in the list.

Figure 61: List of periods

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2.2. Questions used for the Connect Questionnaire

- New questions can be created. To create new questions, go to:

System Administration | Modules | Career Conversation | Master Data | Questions

Figure 62: Career Conversation Master Data - Questions

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- A list of all the questions already set-up will be displayed. The questions are linked to a Section / Theme and can be enabled.

Figure 63: Questions list

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- To create a new question, click on the Create New Question button

Figure 64: Add new question

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- To add a new question, the following field needs to be completed:
 - Description
 - Section
 - Enabled Status

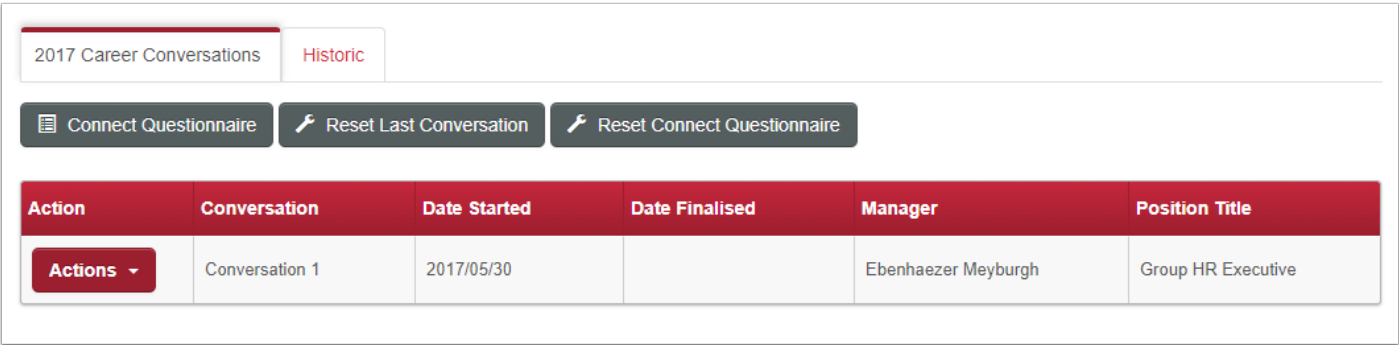
Figure 66: Linking questions to Periods

3. Reset of Statuses

- The administration can reset the following statuses for an employee:
 - Career Conversation
 - Connect Questionnaire
- The path to follow:

Manage Employees | Search for the Employee | Employee Development | Career Conversation

System Administration | Modules | Manage Employees | Search for the Employee | Employee Development | Career Conversation



3.1. Reset Last Conversation

- Resetting the Career Conversation, will reset it to the status. The Conversation Manager can be set to the current manager.

Figure 68: Reset Conversation Status

- The reset status consist of the following:
 - Not Started
 - Started
 - Meeting Request
 - Meeting in Progress
 - Finalised (Disabled)
- Each status will have a description of changes that will be made:
 - Not Started:

- No Career Conversation will be displayed on the Employee's Dashboard
 - Started:
 - The conversation will remain **active** for any changes by the employee.
 - The conversation will be **locked** for the manager.
 - Manager outputs will be **cleared** for all Competencies and KPA's.
 - Manager comments will be **cleared** for all Competencies and KPA's.
 - Meeting Request:
 - The conversation will be **locked** for any changes by the employee.
 - The conversation will remain **active** for the manager.
 - A **Let's Meet** email will be sent to the new manager, if changed.
 - Manager outputs will be **set to default** for all Competencies and KPA's.
 - Manager comments will be **cleared** for all Competencies and KPA's.
 - Meeting in Progress:
 - The conversation will be **locked** for any changes by the employee.
 - The conversation will remain **active** for the manager.
- The Administrator will have an indicator to show in which status the Career Conversation is:

Figure 69: Reset to a Status

3.2. Reset Connect Questionnaire

- The Administrator resets the Connect Questionnaire to:
 - Not Started
 - Started
 - Meeting Request
 - Meeting in Progress
 - Finalised (Disabled)
- Each status will have a description of changes that will be made:
 - Not Started:
 - All the content will be **removed**.
 - The employee will have to answer all questions again.
 - Started:
 - The Connect Questionnaire will remain **active** for any changes by the employee.
 - The Connect Questionnaire will be **locked** for the manager.
 - Manager comments will be **cleared** for all questions.

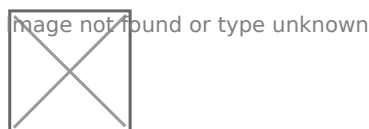
- Meeting Request:
 - The Connect Questionnaire will be **locked** for any changes by the employee.
 - Manager comments will be **cleared** for all questions.
 - A **Let's Meet** email will be sent to the manager.
- Meeting in Progress:
 - The Connect Questionnaire will be **locked** for any changes by the employee.
 - The Connect Questionnaire will remain **active** for the manager.

Figure 70: Reset Connect Questionnaire Status

4. Career Conversation and Connect Questionnaire Exclusions

Excluding an employee means that this particular employee will **not** be doing the Career Conversation and/or Connect Questionnaire **for a specific period**. The employee can be **included** at any given time to do a Career Conversation or the Connect Questionnaire.

To add an employee to the list of exclusions – in order for them **not** to do a Career Conversation and/or Connect Questionnaire – navigate to *System Administration | Modules | Career Conversation | Exclusions*



Employees listed on this page, are **not** doing the Career Conversations and/or Connect Questionnaire.



To add an employee to the exclusion list – in order for them **NOT** to do the Career Conversation and/or Connect Questionnaire – select the "Link Exclusions" button. To select employees, that must **NOT** do the Career Conversation and/or Connect Questionnaire, click on the "Link" button.

To remove employees, in order for them to be **included** in the Career Conversation and/or Connect Questionnaire, click on the "De-link" button (remove them from the exclusion list).

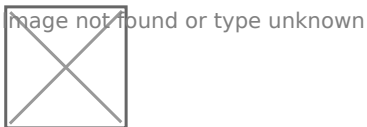
Both Career Conversation and Connect Questionnaire are selected by default when an employee is added on the list of exclusions. To select either Career Conversation or Connect Questionnaire, click on the "Actions" button and select "Edit Exclusions" option. Select the option that needs to be included by unticking that box. The employee will thus be participating in the particular option selected.

To remove an employee from the exclusion list – in order for them to do the Career Conversation and/or the Connect Questionnaire – click on the "Actions" button and select the "De-link" option. The employee will be removed from the list of exclusions and enable them to do the Career Conversation and/or Connect Questionnaire.

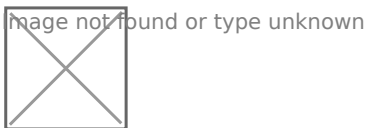
4.1. A practical example

Currently, Monica Alberts (7001) can do both the Career Conversation and the Connect Questionnaire as she is not part of the exclusion list. Monica's manager requests that she should not do the Career Conversation, but she must complete the Connect Questionnaire.

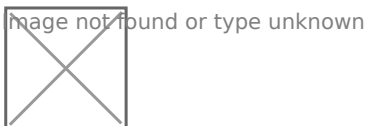
- Go to the Exclusion page
- Select the "Link Exclusions" button
- Select the "Link" button to add her to the list of exclusions



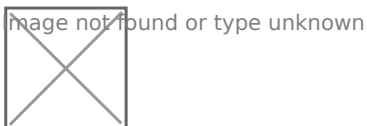
- You will see the "Link" button now changed to a "De-link" button. This is to remove her from the list when requested to do so.



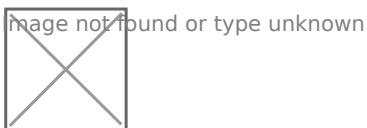
- She is now added to the list of exclusions. Thus, she cannot do the Career Conversation nor the Connect Questionnaire.



- To enable her to do the Connect Questionnaire, click the "Actions" button and select the "Edit Exclusions" option.



- Deselect the Connect Questionnaire tickbox and select the "Continue" button.



- The employee is excluded from the Career Conversation but can still complete the Connect Questionnaire.

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- After a couple of months, she needs to do a Career Conversation and must therefore be removed from the list of exclusions.
- Select the "Actions" button and click on the option. She is removed from this list and will be able to do both Career Conversation and Connect Questionnaire.

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Revision #2

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