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Skill Profile Requirements
Version 4

Prepared for:
Steering Committee

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August 7, 2019

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Replace "Certification Type" with "Skill" Flag

Improve usability of the new *Skill Profile* and *Team Skills* tools by replacing the current "Certification Type" field with new "Skill" flag. Core Curriculum functionality will remain unchanged, while enhancing the LMS administrator experience.

- FCA requirement: Add Brands and Secondary Dealers as larger integration project

> **Commented [SR1]:** More discussion needed.

1. Add/Edit Certification Page

1. Hide existing "Type" field from view.
2. Add new field labeled "Skill", which is a checkbox.
   a. Null box equates to Certification Type 1
   b. Checked box equates to Certification Type 2
3. **Certification Type 1** displays as follows:
   a. "Skill" box is null
   b. "Skill Matrix" section is hidden from page.
   c. Retaining current functionality, this certification does NOT display on *Skill Profile* or *Team Skills* pages

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▪Add / Edit Certification

Add or edit a certification by filling out the fields below and clicking **Submit**. An asterisk [*] indicates a required field.

Owner Organization:	Robinson Gazette ▾
Language:	English ▾
*Name:	CS Basic - Simple Cert
*Description:	CS Basic - Simple Cert
Status:	◉ Active
	○ Inactive
Display:	☑
*Program:	CSR Certifications ▾
*Position Group(s):	Select Position Group(s)
	Customer Service
	TESTING
*Certification Level:	6
Enable Printable Certificate:	☐
Skill:	☐

Primary Rule(s):

Add Primary Rule(s)

4. **Certification Type 2** displays as follows:
   a. "Skill" box is checked
   b. "Skill Matrix" section is displayed on page, allowing edits to Skill Profile, Skill Area, and Skill Level.
   c. Retaining current functionality, this certification does display on *Skill Profile* and *Team Skills* pages

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*Program: CSR Certifications ▼

*Position Group(s):   Select Position Group(s)
Customer Service
TESTING

*Certification Level: 6

Enable Printable Certificate: ☐

Skill: ☑

Skill Matrix

*Skill Profile   Social Media ▼

Skill Area   Twitter ▼

Skill Level   One ▼ ❓

Primary Rule(s):

Add Primary Rule(s)

2. Search Certifications Page

- Hide the "Type" field from *Search Certifications* criteria.
- Add "Skill" flag as filter option: Both (default), Skill, Certification
- Apply filter criteria as a whole, including Skill Profile and Skill Area selections, regardless of Certification Type. Skill filters work to exclude results, making "Type" filter unnecessary.
  a. Null Skill Profile and Skill Area filters will return all
  b. When Skill Profile and/or Skill Area criteria are applied, only associated certifications will be returned in results.
- Update results table as follows:
  a. Remove "Type" column
  b. Add "Skill Level" column after "Skill Area"

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Assign Goal Enhancements

Goal assignment wizards were developed before our Certification Enhancement, when "Self-Assign Goals" feature only applied to Certification goals, and excluded Curriculums. For this project, we must enhance the *Assign Goal* and *Self-Assign Goal* tools with the ability to add goals for Certification Type 2 from new *Skill Profile* and *Team Skills* pages.

3. Add New Goal Type: Skills

Add new Training Goal type "Skills" to the Self-Assign and Assign Goal wizards. Based on the list of active Programs and Certifications Type 2 in portal, provide drop down menus with scoped data options:

1. Skill Profile – All active. In Self-Assign tool, scope by user's Position Group.
2. Skill Area – Scope to selected profile
3. Skill Level – Scope to selected area, list in defined Sort Order

When user populates Skill Level filter, display the list of associated Certification Type 2 in "Certifications" type-ahead field. User can add or remove values in list, per usual.

Values in dependent components should always reflect changes to its parent. E.g. Student populates all three criteria, and sees list of Skills. Then they change Skill Area criteria. That action should automatically clear Skill Level and Certification results list, forcing them to select new level value to continue.

Assign Goals

Training Goal

Goal Type

| Certifications | Courses | Skills |

Skill Profile

<<Select>>

Skill Area

<<Select>>

Skill Level

<<Select>>

Certifications

At least one selection is required.

Due Date

| Date | Due In Days | None |

Run   Cancel

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4. Enhance Wizards to Open in Modal

To improve user workflow, these wizards will be enhanced to open in modal instead of new window/tab. When user clicks "Run" or "Cancel" button, the modal will close, returning users to the previous page.

New modal display will apply to pages: *My Goals, Skill Profile, My Team, Team Skills, Goals*

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Skill Profile

Build an Angular page to replace the classic student *Skills* page (/certification/user/curriculum_view_status2.aspx). The new *Skill Profile* page provides students a comprehensive summary of their status in each Skill Profile, plus the ability to drill down into their curriculum assignments and achievements in each Skill Area.

Page Header

Title: Skill Profile

Icon: user-md

5. Filter

Standard Filter component should always display (cannot collapse), and requires selection of two criteria. Hide buttons that Add/Remove filters.

Values in type-ahead menu are scoped to user's Position Group and are sorted alphabetically. Display first in list for results on initial page load.

1. Program Is: list only those Programs that house the Certifications user is eligible to achieve. Program selection will drive the list of values that populate in Skill Profile menu below.
2. Skill Profile Is: list only the Skill Profiles tied to Certifications user is eligible to achieve, within the selected Program.

6. Skill Matrix

Based on default Skill Profile listed in menu, populate its active Skill Area/Skill Level matrix. NOTE: Do not display a column if the Level has no active Rules.

- Table Header: Skill Profile Name
- Row = Skill Area (Abbreviation Name)
- Column = Skill Level Name (sorted by Ordinal, left to right)
    - Do not display a column for a Level that has no Active rules. If the Level has at least one active certification rule, the column should be displayed.
- Cell = Populate icons according to user's current goal or certification status. If more than one Certification has same Skill Area/Skill Level designation, consider user status in all, then display Achieved over Assigned.
    - Caret = No goal or certification transcripts
    - Star = Goal Assigned
    - Trophy = Certification Achieved

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Skill Profile

| Program | Is | 2019 |
| Skill Profile | Is | Certified Technician |

Apply Filter

Certified Technician

	Foundations	Essentials	Masters	
Electrical	🏆	✸	⌄	
Engine	✸	⌄	⌄	
Safety	🏆	⌄	⌄	

7. Skill Area Summary

Click a Skill Area name to expand the row and find a progress bar for each Skill Level, summarizing user's status within each certification as percent complete.

Click a status icon to expand corresponding cell, and view "Certification Status Detail" as described below.

Skill Profile

| Program | Is | 2019 |
| Skill Profile | Is | Certified Technician |

Apply Filter

Certified Technician

	Foundations	Essentials	Masters	
Electrical	🏆	✸	⌄	
	100% Complete	36% Complete	10% Complete	
Engine	✸	⌄	⌄	
Safety	🏆	⌄	⌄	

Calculating Certification Progress

Progress bar from *Team Certifications* page displays percent complete according to the number of rules user has met out of total rules required. Certification Progress is calculated and stored in a database table, eliminating performance concerns by loading pre-calculated data in real time.

> **Commented [SR4]:** Consider manual recalculation trigger.

The goal here is to show continual progress as user meets each rule requirement, always reflecting their highest achievements within the rule set. Ignore requirements for which user meets Not or Exempt rules. Start from the bottom and work up the rule chain to determine "Progress" percent complete: Generic Rule average → Primary Rule average → Certification percent complete

- Calculate percent complete for **Generic Rules** based on type:
  - Completion – Number of requirements met/total number
  - Elective –
    - Number of Requirements Completed: Number of requirements met/X
    - Credits Passed: Number of course credits met/Y
  - Department Objective –
    - Percentage: Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
    - Count: Number met/Z
  - Individual Performance – Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
  - Location Performance – Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
  - Top Performance – Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
- Each **Primary Rule** weighted based on Generic Rule requirements.
  - One Of: Average the percent of all Generic Rules, display highest percentage complete
  - All Of: Count all requirements, then calculate number met/total to get percent complete
- Met all rules = 100% Complete

8. Certification Status Detail

Click an icon in matrix to view all Certifications within selected Skill Area/Skill Level. Each certification will display as card, including user progress bar, rule list with status, and course list with enrollment status. Single click actions allow students to enroll/launch Courses or export the Certification Tree with rule status.

Certification Cards

Certification cards include the following components.

1. Certification Name – Card header

2. Certification Progress – Percent Complete as donut graph
3. Generic Rule List – This list includes all Primary Rules applicable to user, but does not display Primary Rule Name. Instead, use Primary Rules as grouping mechanism, with title based on type: Complete ["all of" – OR – "one of"] of the following requirements
    a. Each Generic Rule is listed as expandable section, with Name and Type description in header and collapse/expand detail option described below.
    b. Rule Status: Met – Generic Rule Detail is collapsed by default, and displays green checkmark next to rule name.
    c. Rule Status: Not Met – Generic Rule Detail is expanded by default
4. Actions – Described in detail below. Generally, Completion and Elective rule types will display course list with enroll/launch buttons. Footer section provides smart Self-Assign Goal button and Certification Status export options.

Generic Rule Detail

Users can click a Rule Name to expand requirement details.

Courses in Completion and Elective rule list should display same as *Courses To Complete >* *Required* page, plus be color coded according to user's current transcript status.

> **Commented [SR5]:** Offering Number (ILT), Score Date

- Green = Attend(Pass), Attend No Bill (Pass)
- Yellow = Scheduled, Launched, Attended (No-post test)
- Blue = On Interest List, Pending (Prerequisites, Manager Approval, etc.)
- Red = Fail, Cancel, Incomplete, No Show, Ineligible
- White = Not Enrolled
- Gray = Update course (not applied)

Click course icon to expand details. Course Names link to their *Course Details* page.

Other rule types display according to Met/Not Met status.

- Green = Met
- White = Not Met

Action Buttons

Course action buttons should display same as *Courses To Complete > Required* page, based on user's transcript history, interest list, and course settings.

- Enroll/Launch
- Cancel Enrollment/Cancel Interest
- Self-Certify Completion
- Download Calendar.ics file
- Information

If portal has "Self-Assign Goal" feature enabled, and user has no associated **Goal**, display [+Goal] button in card footer. Hide button for users with goal transcript.

- Click the [+Goal] button to open the Self-Assign Goals wizard in modal.
- When accessed from this page, the wizard will pre-populate "Skills" goal type with all "Certifications" listed in selected cell.
- User can complete the goal assignment process or cancel out, and return to their *Skill Profile* page.

New requirement to add "Self-Assign Goal" flag to Add/Edit Certifications page.

Add standard data **Export** options: Excel, CSV, PDF. Students will be able to download their certification requirements and status into selected file format on demand.

Certification Tree export should be based off current "Print" model, with some modifications:

- Hide all inactive records from view (Primary Rule, Generic Rule, Course, Certification, etc.)
- Remove rule Status (Active/Inactive)
- Remove URLs from Record Name
- Remove Record ID
- Add user's Rule Status
- Add user's Course Enrollment Status

Certification Status Mockups

Here is an example of a simple certification with two Generic Rules. Because user has met all requirements, rules are collapsed by default, but can be expanded for review.

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The following example is a certification that user has neither assigned nor achieved. User has completed one of three requirements, and sees course enroll/launch buttons based on their current enrollment status. The [+Goal] button allows them to assign this certification as a new goal.

Commented [SR7]: Consider logic to automatically assign nested certs as goals. E.g. Assign Level 3 auto-assigns Level 2 and 1

Technical Competencies

	Level 1	Level 2	Level 3	
Electrical	🏆	🏆	☝	

Electrical Gold Certification

✔ Gold Technician Required Courses ⌄		Complete all courses
Gold Technician Elective Courses ⌃		Complete 4 credit(s)

36% Complete

	Advanced Electronics ELECTRIC02 Pass(No Bill)	1 Credit(s)	
	Conflict Management CNFM01 Scheduled	2 Credit(s)	▶
	Facilitating Improvement EFFA01 Failed	4 Credit(s)	▶
	But I Don't Have Customers BDHC01 Pending	1 Credit(s)	

Gold Technician Department Goal ⌃			Meet certification objective
Postion Group Technicians	**Certification.** Electric Foundations	**Current** 0 of 5	

+ Goal

	Level 1	Level 2	Level 3
Engine	✴	⌄	⌄
Safety	🏆	⌄	⌄

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Team Skills

Build an Angular page to replace the classic *Department Curriculum Status* page (/certification/user/curriculum_managed_students_view2.aspx). Managers can use the new *Team Skills* page to see their employees' skills at a glance, drill into a Skill Area to see who on their team has achieved or assigned certifications within each Skill Level, and assign training goals accordingly. Managers should see their own records counted in Skills Matrix and status details.

9. Filters

Standard Filter component will enforce the first three criteria (no add/remove filter buttons). Values in type-ahead menu are sorted alphabetically, and display first in list for results on initial page load.

Required:

1. Program Is – All active records
2. Position Group Is – All active records
3. Skill Profile Is – Values based on two filter criteria listed above. Initial page load will display first Skill Profile in list.

Optional:

4. Certification – All active Certification Type 2 records
5. Organization – Scope to user's organization tree
6. Position – Scope to user's Position Code Hierarchy; all active in Person-to-Person portals
7. User – Scope to user's organization tree and reporting hierarchy.

*Depending on which Reporting Hierarchy is enabled, one of the following two filters are applied as default.

- **Position Code**: Organization > In Exact Organization > [logged-in location]
- **Person-to-Person**: User > Directly Reports To > [logged in user]

10. Team Skill Profile Matrix

The new Team Skill Profile is a matrix of active Skill Areas and Skill Levels. Cells will be color coded, to give managers a sense of team status and competencies at a glance. When at least one person on the team has a certified Skill, the associated area/level cell will display green with Achieved Certification counter. Null white cells represent skill gaps.

Refresh matrix data every time user applies new filters.

A. Table Header: Skill Profile Name
B. Row = Skill Area (Abbreviation Name)
C. Column = Skill Level Name (sorted by Ordinal, left to right)

> **Commented [SR8]:** FCA does not place multiple certifications in single Area/Level cell.

- o Do not display a column for a Level that has no active rules. If the Level has at least one active certification rule, the column should be displayed.

D. Cell = Cells are color coded to represent filtered team's achieved certification status. Green means at least one person is certified, and white cells represent skill gaps.
  - o If more than one Certification has same Skill Area/Skill Level designation, consider user status in all, then display Achieved over Assigned.
  - o Display total number of people who achieved certification in middle of green cells.

Sales Skill Profile	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
Account Managers	10	6				
Business Development	3		3			
Lead Generation	9	6	4			
Sales Support	13	4	2		1	
Outside Sales	12	15	6	8		
Inside Sales	8	1				

11. Skill Area Summary

Managers can click a Skill Area name to find how many users have a Certification Goal assigned at each level. By comparing these data points – Assigned and Achieved – they can identify not only certified skill gaps, but which new goals need assigned as well.

Star icon represents at least one Goal assignment. Display total count for each Skill Level.

Sales Skill Profile	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
Account Managers	10	6				
Business Development	3		3			
Lead Generation	9	6	4			
	⭐1		⭐2	⭐4	⭐1	
Sales Support	13	4	2		1	

Commented [SR9]:

Commented [SR10R9]: Same for Skill Profile page

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12. Team Status Detail

Click a cell to expand the "Team Status Detail" view. This feature allows managers to see who on the team has been certified and who has been assigned goals at each level. By comparing these user lists, managers can keep a good pulse on who is actively working toward filling skill gaps, and which users may need new goals assigned.

Display a stacked version of user Certification Card described above, one for each cert with selected Skill Area/Skill Level designation. The Team Certification Card will provide a user list, with the ability to drill into individual status detail.

Team Certification Card

Display team status and details as a bootstrap card for each associated Certification. Team Certification cards include the following components.

1. Certification Name – Card header
2. User List – List all users by Name who have either an assigned goal or achieved transcript for certification. User count should match combined Skill Area Summary counts.
3. Status Icons – Each user record will display their certification status as assigned, achieved, or both.
   a. If user has Goal record in Assigned or Achieved status, display the star icon (exclude goals in Waived status).
   b. If user has an Achieved Certification transcript, display the trophy icon (exclude revoked transcripts).
4. Individual Certification Progress – To the right of each user's Name, display their percent complete bar graph from *Team Certifications* page.
5. Certification Status Detail – Click User icon to drill into their current status, same as their own *Skill Profile* page WITHOUT course action buttons. (See corresponding section above for details.)
6. Actions – Described in detail below. Generally, Certification Status export options (PDF, Excel, CSV) are provided for each user in list. Card footer section displays Assign Goal button.

Action Buttons

Click a User icon to expand Certification Status details.

Export an individual's progress and rule status on demand, by clicking any of the file export buttons: PDF, Excel, CSV

Click [+Goals] button in upper right corner of card to open the *Assign Goals* wizard with the following data points pre-defined.

   o User Filter:
      ▪ Certification Not Achieved [Selected Certification]
      ▪ Certification Not Assigned [Selected Certification]
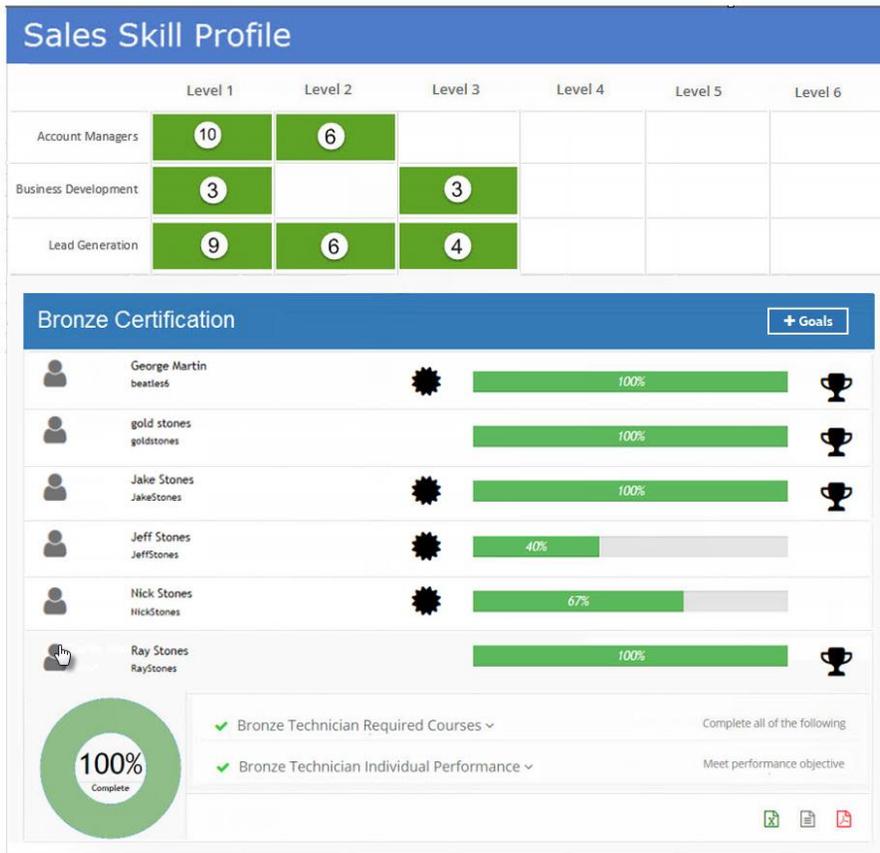   o Training Goal: Skills [Selected Certification]

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Team Certification Status Mockup

In this example, manager has expanded Lead Generation Level 3. Corresponding certification is displayed with user list, status, and progress bar.

Manager then clicked user "Ray Stones", drilling into his rule and course status details.

FCA Team Skills Page

FCA *Team Skills* page could include Minimum Training Requirement data in Skill Area expando, plus additional color coding in matrix.

Red Cell = MTR with ZERO certified users

Yellow Cell = MTR with at least ONE certified user, but goal not met

Green Cell = MTR met