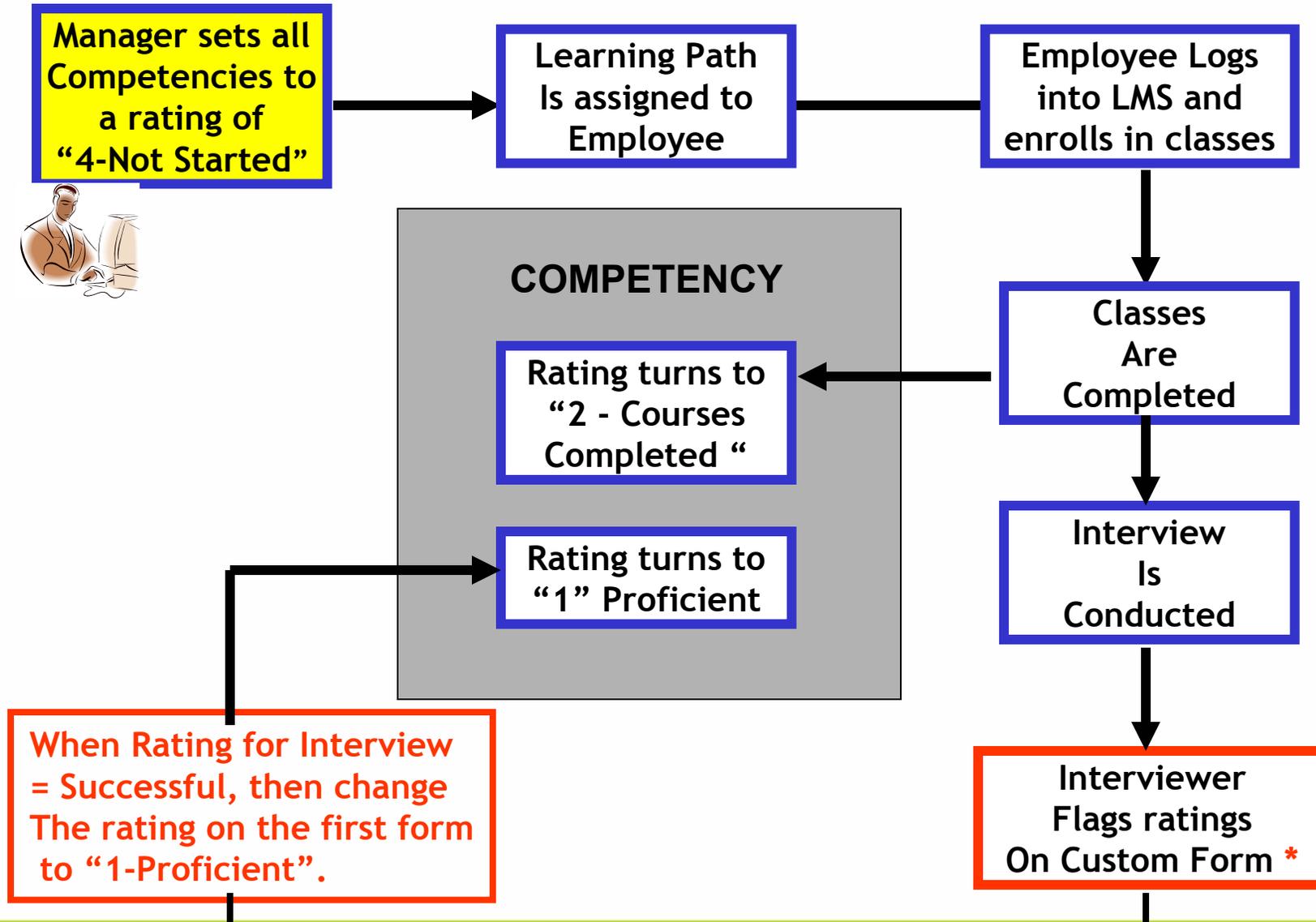
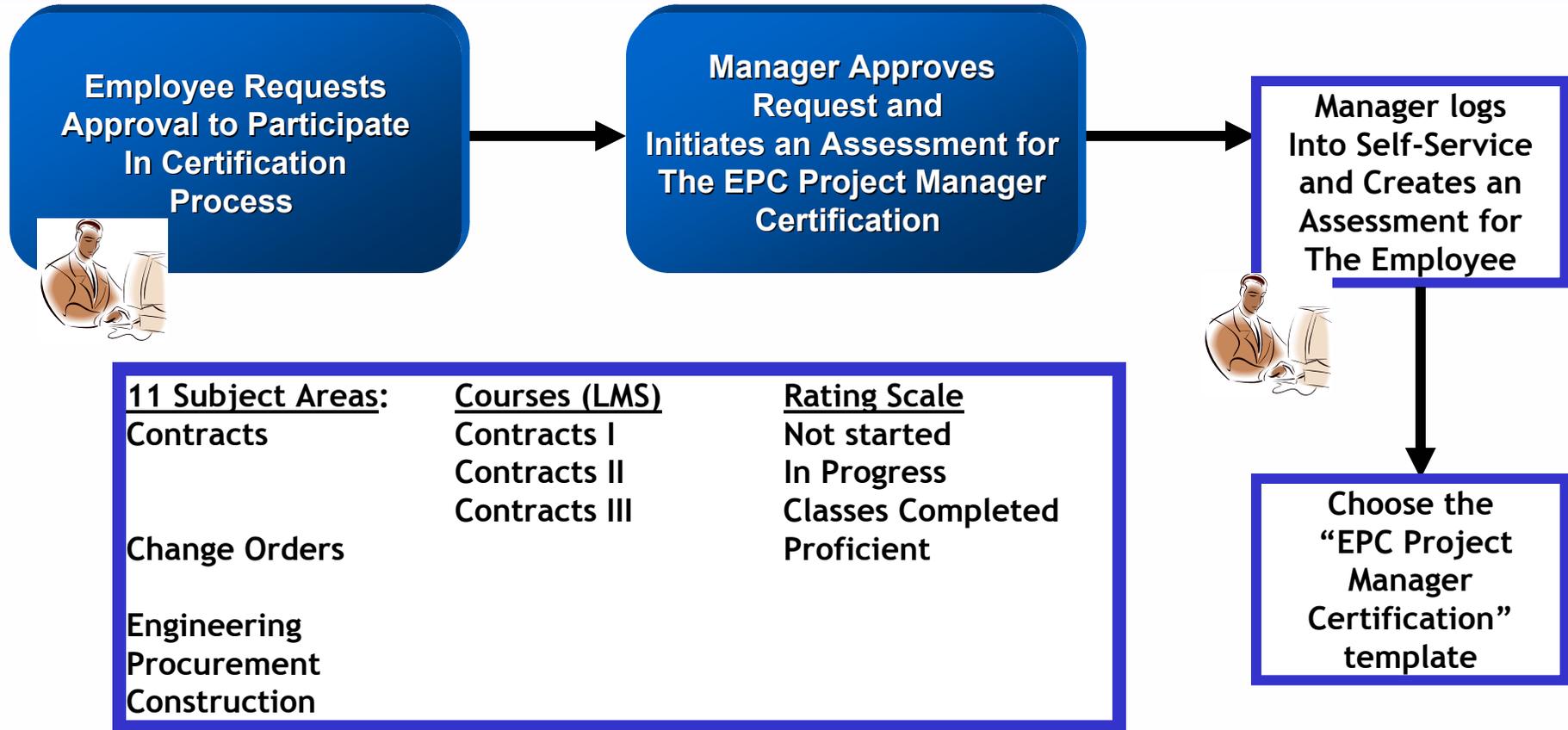


How Learning and Talent Management Work Together

Kim Flannagan – Solution Consultant, USi

DRAFT





In order to be certified, the candidate must achieve “Proficient” Rating in all 11 subject areas. Each subject area includes 3 Courses (set up in LMS) AS WELL AS one successful interview with the Subject Matter Expert (SME).

Manager Action: Initiate Certification Process

ORACLE [Diagnostics](#) [Preferences](#) [Close Window](#)

● — ○ — ○ — ○
Setup Details Overview Participants Review

Create Standard Appraisal: Setup Details

[Cancel](#) [Save as Draft](#) [Transfer to Appraisee](#) Step 1 of 4 [Next](#)

Employee Name **Boyle, Mrs. Louise** Employee Number **1874**
Organization Email Address **LBOYLE** Business Group **Burns & McDonnell**

Enter the start and end dates for the period covered by the appraisal, and select an appraisal template. All other details are optional or defaulted. You can save your work at any stage, or you can delete the appraisal by clicking Cancel. Click Next to add further detail, but note that you cannot change the template or assignment once you have done so.

* Indicates required field

Appraisal Purpose	<input type="text"/>
* Period Start Date	<input type="text" value="20-Jun-2007"/>
	<small>(example: 20-Jun-2007)</small>
* Period End Date	<input type="text" value="20-Jun-2007"/>
Template	EPC PM CERT2
* Appraisal Date	<input type="text" value="20-Jun-2007"/>
Next Appraisal Date	<input type="text"/>
Assignment Number	1874
* Main Appraiser	<input type="text" value="Palmer, Mr. Blair D. (Blair)"/>

[Cancel](#) [Save as Draft](#) [Transfer to Appraisee](#) Step 1 of 4 [Next](#)

[Diagnostics](#) | [Preferences](#) | [Close Window](#)

Copyright 2000-2004 Oracle Corporation. All rights reserved.
[About this Page](#) [Privacy Statement](#)

Done Trusted sites

start | Microsoft Excel - tem... | 6 Internet Explorer | Microsoft PowerPoint ... | Address 100% | 3:32 PM

Manager Action: Set Proficiency ratings to 4- Not Started

ORACLE Diagnostics Preferences Close Window

○ Setup Details ● **Overview** ○ Participants ○ Review

Create Standard Appraisal: Overview

Cancel Save as Draft Transfer to Appraisee Back Step 2 of 4 Next

Effective Date 14-Feb-2007

Employee Name	Boyle, Mrs. Louise	Employee Number	1874
Organization Email Address	<u>LBOYLE</u>	Department	Corporate Human Resources
Manager	Palmer, Mr. Blair D. (Blair)	Job	ACC500.Accounting Manager
Salary Basis	Exempt	Salary	

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your evaluation. If no competencies are displayed, click Default Job Competencies to view competencies attached to the job. Clicking Delete removes the competency from this appraisal only.

Default Job Competencies Add Competencies

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Delete
Change Orders2 ⓘ		<input type="text" value=""/>		
Construction2 ⓘ		<input type="text" value="1-Proficient"/>		
Contracts2 ⓘ		<input type="text" value="2-Courses Completed"/>		
Engineering2 ⓘ		<input type="text" value="3-In Progress"/>		
Procurement2 ⓘ		<input type="text" value="4-Not Started"/>		

Objectives

Click Add Objective to create objectives against which you measure performance.

Trusted sites

start Microsoft Excel - tem... 6 Internet Explorer Microsoft PowerPoint ... Address 100% 3:32 PM

Manager Action: Give FINAL Ratings

ORACLE [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#)

Confirmation
Your changes have been saved.

Main Appraiser Review

[Transfer to Appraisee](#) [Edit Appraisal](#) [Give Final Ratings](#)

Effective Date 14-Feb-2007

Employee Name	Boyle, Mrs. Louise	Employee Number	1874
Organization Email Address	<u>LBOYLE</u>	Department	Corporate Human Resources
Manager	Palmer, Mr. Blair D. (Blair)	Job	ACC500.Accounting Manager
Salary Basis	Exempt	Salary	

.....

You can review what the appraisee and other participants have completed, and you can update the basic details, such as changing the main appraiser. Click the inline tips to see details of competencies, objectives, or training courses. Click Transfer to Appraisee to send the appraisal to the appraisee for completion. Click Edit Appraisal to record your evaluations. Click Give Final Ratings to complete the appraisal.

Setup Details

[Update Setup Details](#)

Initiator	Palmer, Mr. Blair D. (Blair)	Appraisal Purpose	
Period Start Date	20-Jun-2007	Period End Date	20-Jun-2007
Template	EPC PM CERT2	Main Appraiser	Palmer, Mr. Blair D. (Blair)
Appraisal Date	20-Jun-2007	Next Appraisal Date	

Competencies

Details	Competency	Current Proficiency Level	Appraisee Proficiency Rating	Main Appraiser Proficiency Rating
Show	Change Orders2	4-Not Started		4-Not Started
Show	Construction2	4-Not Started		4-Not Started
Show	Contracts2	4-Not Started		4-Not Started
Show	Engineering2	4-Not Started		4-Not Started

Trusted sites

start | Microsoft Excel - tem... | 5 Internet Explorer | Microsoft PowerPoint ... | Address 100% | 3:48 PM

Manager Action: Set Final Ratings to 4- Not Started

ORACLE [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#)

Give Final Ratings: Main Appraiser

Effective Date 14-Feb-2007

Employee Name	Boyle, Mrs. Louise	Employee Number	1874
Organization Email Address	<u>LBOYLE</u>	Department	Corporate Human Resources
Manager	Palmer, Mr. Blair D. (Blair)	Job	ACC500.Accounting Manager
Salary Basis	Exempt	Salary	

Record the final rating details, including the competency ratings, overall ratings, advancement potential, and any additional comments. Once you have completed the final ratings, click Continue.

Competency Ratings

Record your competency ratings. To view the competency details before you record a new score, click the tip icon. Click Show to view all participants' ratings.

Details	Competency	Current Proficiency Level	New Proficiency Level	Score
▶ Show	Change Orders2 ⓘ	4-Not Started	4-Not Started ⓘ	0
▶ Show	Construction2 ⓘ	4-Not Started	4-Not Started ⓘ	0
▶ Show	Contracts2 ⓘ	4-Not Started	4-Not Started ⓘ	0
▶ Show	Engineering2 ⓘ	4-Not Started	4-Not Started ⓘ	0
▶ Show	Procurement2 ⓘ	4-Not Started	4-Not Started ⓘ	0

Overall Competency Information

Add any overall comments about the appraisee's competency performance.

Total Score _____

Comments

Trusted sites

start | Microsoft Excel - tem... | 5 Internet Explorer | Microsoft PowerPoint ... | Address 100% | 3:49 PM

Gets sent for approval

Address http://la1007.oracleads.com/OA_HTML/OA.jsp?page=/oracle/apps/per/selfservice/appraisals/webui/MAFinalRatingsRevPG&_ri=800&OAFunc=HR_STANDARD_APPRAIS Go Links

Google G Go RS Bookmarks Popups okay Check AutoLink AutoFill Send to Settings

ORACLE Diagnostics Home Logout Preferences

Confirmation
You have submitted the appraisal for approval.

Manager Appraisals
This table displays all appraisals that you have not yet submitted. To create a new appraisal select an appraisal type from the Create list and [View Other Appraisals](#) click Go. You can also select individual appraisals for update or deletion, if permitted.

Appraisals To Be Submitted
This table displays all appraisals that you have not yet submitted. To create a new appraisal select an appraisal type from the Create list and click Go. You can also select individual appraisals for update or deletion, if permitted.

Create

Appraisee	Appraisal Date ▾	Type	Main Appraiser	Status	Details	Update	Delete
Barker, Bob	20-Jun-2007		Palmer, Mr. Blair D. (Blair)	Planned			

Appraisals as Participant
You can view and (if permitted) update appraisals in which you are participating. To view existing appraisals, select Completed, In Progress, or All and click Go.

View

Previous 1-10 Next 10

Initiator	Appraisee	Appraisal Date ▾	Status	Main Appraiser	Participation Type	Participation Status	Details	Appraise	Delete
Palmer, Mr. Blair D. (Blair)	Boyle, Mrs. Louise	20-Jun-2007	Pending Approval	Palmer, Mr. Blair D. (Blair)	Main Appraiser	Open			
Palmer, Mr. Blair D. (Blair)	Aafjes, Mr. Bert B	16-Jun-2007	Ongoing	Palmer, Mr. Blair D. (Blair)	Main Appraiser	Open			
Palmer, Mr. Blair D. (Blair)	Deneroff, Brian	15-Jun-2007	Pending Approval	Palmer, Mr. Blair D. (Blair)	Main Appraiser	Open			
Palmer, Mr. Blair D. (Blair)	Foley, Janet	15-Jun-2007	Transferred	Palmer, Mr. Blair D. (Blair)	Main Appraiser	Open			

Done Trusted sites

start Microsoft Excel - tem... 5 Internet Explorer Microsoft PowerPoint ... Address 100% 3:49 PM

Once courses are completed, the proficiency rating gets automatically moved

ORACLE Manager Self-Service

Diagnostics Home Logout Preferences

Setup Details **Overview** Participants Review

Update Standard Appraisal: Overview

Cancel Save as Draft Transfer to Appraisee Back Step 2 of 4 Next

Effective Date 27-Feb-2007

Employee Name	Barker, Bob	Employee Number	1882
Organization Email Address	BBARKER	Department	Finance, Vision
Manager	Palmer, Mr. Blair D. (Blair)	Job	ACC400.Accountant
Salary Basis	Exempt	Salary	42,000.00 US dollar

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your evaluation. If no competencies are displayed, click Default Job Competencies to view competencies attached to the job. Clicking Delete removes the competency from this appraisal only.

Default Job Competencies Add Competencies

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Delete
Change Orders2 <i>i</i>		2-Courses Completed <i>i</i>		
Construction2 <i>i</i>		2-Courses Completed <i>i</i>		
Contracts2 <i>i</i>		2-Courses Completed <i>i</i>		
Engineering2 <i>i</i>		2-Courses Completed <i>i</i>		
Procurement2 <i>i</i>		2-Courses Completed <i>i</i>		

Competencies

Objectives

start Oracle Self-Service ... Burns & McDonnell Custom_Form_Mock... Burns&McDonnell_E... Address 100% 9:29 AM

Interviewer logs in after conducting the interview to put in the ratings.

The screenshot shows the Oracle Manager Self-Service interface for updating a standard appraisal. The page title is "Update Standard Appraisal: Setup Details". At the top, there is a navigation bar with "ORACLE Manager Self-Service" on the left and "Diagnostics Home Logout Preferences" on the right. Below the navigation bar is a progress indicator with four steps: "Setup Details" (active), "Overview", "Participants", and "Review".

The main content area includes a header "Update Standard Appraisal: Setup Details" and a set of action buttons: "Cancel", "Save as Draft", "Transfer to Appraisee", "Step 1 of 4", and "Next".

Employee information is displayed:

- Employee Name: **Barker, Bob**
- Organization Email Address: **BBARKER**
- Employee Number: **1882**
- Business Group: **Burns & McDonnell**

Instructions: "Enter the start and end dates for the period covered by the appraisal, and select an appraisal template. All other details are optional or defaulted. You can save your work at any stage, or you can delete the appraisal by clicking Cancel. Click Next to add further detail, but note that you cannot change the template or assignment once you have done so."

A note indicates: "* Indicates required field".

The form fields are:

- Appraisal Purpose: [Dropdown menu]
- * Period Start Date: [Text box: 20-Jun-2007] [Calendar icon]
- (example: 21-Jun-2007)
- * Period End Date: [Text box: 20-Jun-2007] [Calendar icon]
- Template: [Text box: EPC PM CERT2]
- * Appraisal Date: [Text box: 20-Jun-2007] [Calendar icon]
- Next Appraisal Date: [Text box]
- Assignment Number: [Text box: 1882]
- * Main Appraiser: [Text box: Palmer, Mr. Blair D. (Blair)] [Lightbulb icon]

At the bottom of the form area, there are action buttons: "Cancel", "Save as Draft", "Transfer to Appraisee", "Step 1 of 4", and "Next".

Footer: "Copyright 2000-2004 Oracle Corporation. All rights reserved." and "Diagnostics | Home | Logout | Preferences".

The Windows taskbar at the bottom shows the Start button, several open applications (Oracle Self-Service, Burns & McDonnell, Custom_Form_Mock..., Burns&McDonnell_E...), the address bar with "100%", and the system tray with the time "9:32 AM".

Navigation: Manager Self Service Responsibility > Appraisals > New > Second Step

ORACLE Manager Self-Service

Diagnostics Home Logout Preferences

Setup Details | **Overview** | Participants | Review

Create Standard Appraisal: Overview

Step 2 of 4

Effective Date 01-Jun-2000

Employee Name	Aafjes, Mr. Bert B	Employee Number	1256
Organization Email Address		Department	Corporate Human Resources
Manager	Palmer, Mr. Blair D. (Blair)	Job	CON600.Consultant
Salary Basis	Exempt	Salary	

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your evaluation. If no competencies are displayed, click Default Job Competencies to view competencies attached to the job. Clicking Delete removes the competency from this appraisal only.

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Delete
Contracts ⓘ		<input type="text" value=""/> ⓘ		
Change Orders ⓘ		<input type="text" value=""/> ⓘ		
Procurement ⓘ		<input type="text" value=""/> ⓘ		
Engineering ⓘ		<input type="text" value=""/> ⓘ		
Construction ⓘ		<input type="text" value=""/> ⓘ		

Objectives

New link

From this screen we would like to have a link to a custom form ->

Custom Form should include:

ORACLE Manager Self-Service

Diagnostics Home Logout Preferences

Setup Details **Overview** Participants Review

We would change the step Name here to say →

Create Standard Appraisal: Overview

Additional Qualifications Update Cancel Save as Draft Transfer to Appraisee Back Step 2 of 4 Next

Effective Date 01-Jun-2000

Employee Name	Aafjes, Mr. Bert B	Employee Number	1256
Organization Email Address		Department	Corporate Human Resources
Manager	Palmer, Mr. Blair D. (Blair)	Job	CON600.Consultant
Salary Basis	Exempt	Salary	

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your ratings. When competencies are displayed, click Default Job Competencies to view competencies attached to the job. Clicking Delete removes a competency from the list.

Default Job Competencies Add Competencies

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Delete
Contracts		<input type="text" value=""/> ▾	Ratings scale	
Change Orders		<input type="text" value=""/> ▾		
Procurement		<input type="text" value=""/> ▾		
Engineering		<input type="text" value=""/> ▾		
Construction		<input type="text" value=""/> ▾		

Objectives

Done Trusted sites

We would like to have the same competency column come up on the custom Form, but have two dropdowns – one for “On the Job Training” and one for “Interview” There should be a drop-down list for each competency and for each

ORACLE [Diagnostics](#) [Preferences](#) [Close Window](#)

Custom Form

○ Setup Details — ● **Overview** — ○ Participants — ○ Review

Create Standard Appraisal: Overview

Step 2 of 4

Effective Date 27-Feb-2007

Employee Name Barker, Bob	Employee Number 1882
Organization Email Address BBARKER	Department Finance, Vision
Manager Palmer, Mr. Blair D. (Blair)	Job ACC400.Accountant
Salary Basis Exempt	Salary

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your evaluation. If no competencies are displayed, click Default Job Competencies to view competencies attached to the job. Clicking Delete removes a competency from this appraisal only.

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Delete
Change Orders2 ⓘ		<div style="border: 1px solid red; padding: 2px; display: inline-block;">Interview</div>	✎	🗑️
Construction2 ⓘ		1-Proficient 2-Courses Completed 3-In Progress 4-Not Started	✎	🗑️
Contracts2 ⓘ			✎	🗑️
Engineering2 ⓘ			✎	🗑️
Procurement2 ⓘ			✎	🗑️

Different scale will show

Objectives

Click Add Objective to create objectives against which you measure performance.

I'll create a new rating scale that will have 2 ratings available: "Interview Success" and "Interview Failed". Once the proficiency is set and saved To "Interview Success", then automatically change the proficiency rating on the first

Additional Logic would be needed. For On the Job Training

ORACLE Manager Self-Service

Diagnosics Home Logout Preferences

Setup Details **Overview** Participants Review

Create Standard Appraisal: Overview

Cancel Save as Draft Transfer to Appraisee Back Step 2 of 4 Next

Effective Date 01-Jun-2000

Employee Name **Aafjes, Mr. Bert B** Employee Number **1256**
 Organization Email Address Department **Corporate Human Resources**
 Manager **Palmer, Mr. Blair D. (Blair)** Job **CON600.Consultant**
 Salary Basis **Exempt** Salary

Competencies

Click Add Competencies to add the competencies against which to measure performance and record your evaluation. When the competencies are displayed, click Default Job Competencies to view competencies attached to the job. Clicking Delete removes the competency from the list.

Default Job Competencies Add Competencies

Competency	Current Proficiency Level	Proficiency Rating	Proficiency Rating	tails	Delete
Contracts		▼	▼		🗑️
Change Orders		1-Proficient 2-In Progress 3-Not Proficient	▼		🗑️
Procurement		▼	▼		🗑️
Engineering		▼	▼		🗑️
Construction		▼	▼		🗑️

On the Job training

Objectives

I'll create a new rating scale that will have 2 actions available:
 "In Process " and "Completed". Once the proficiency is set and saved
 To "Completed", then automatically change the proficiency rating on the first

Rating Scales

Name **Burns & McDonnell EPC Cert Scale** Type **Proficiency**

Description

Default Rating Scale Global []

Levels []

Level	Name
1	Proficient
2	Courses Completed
3	In Progress
4	Not Started

Behavioral Indicator

Indicates that both Training Courses AND the Interview with the Subject Matter Expert have been completed successfully.

2. Competency Setup

New Competencies

Scope

Local Global

Name **Change Orders**

Description

Alias

Cluster Further Information

Valid Date and Proficiency

Unit Standard Qualifications Framework Details

Valid Dates

From **01-JAN-2007**

To

Proficiency

Levels (B) Scale

Rating Scale **Burns & McDonnell EPC Cert Scale**

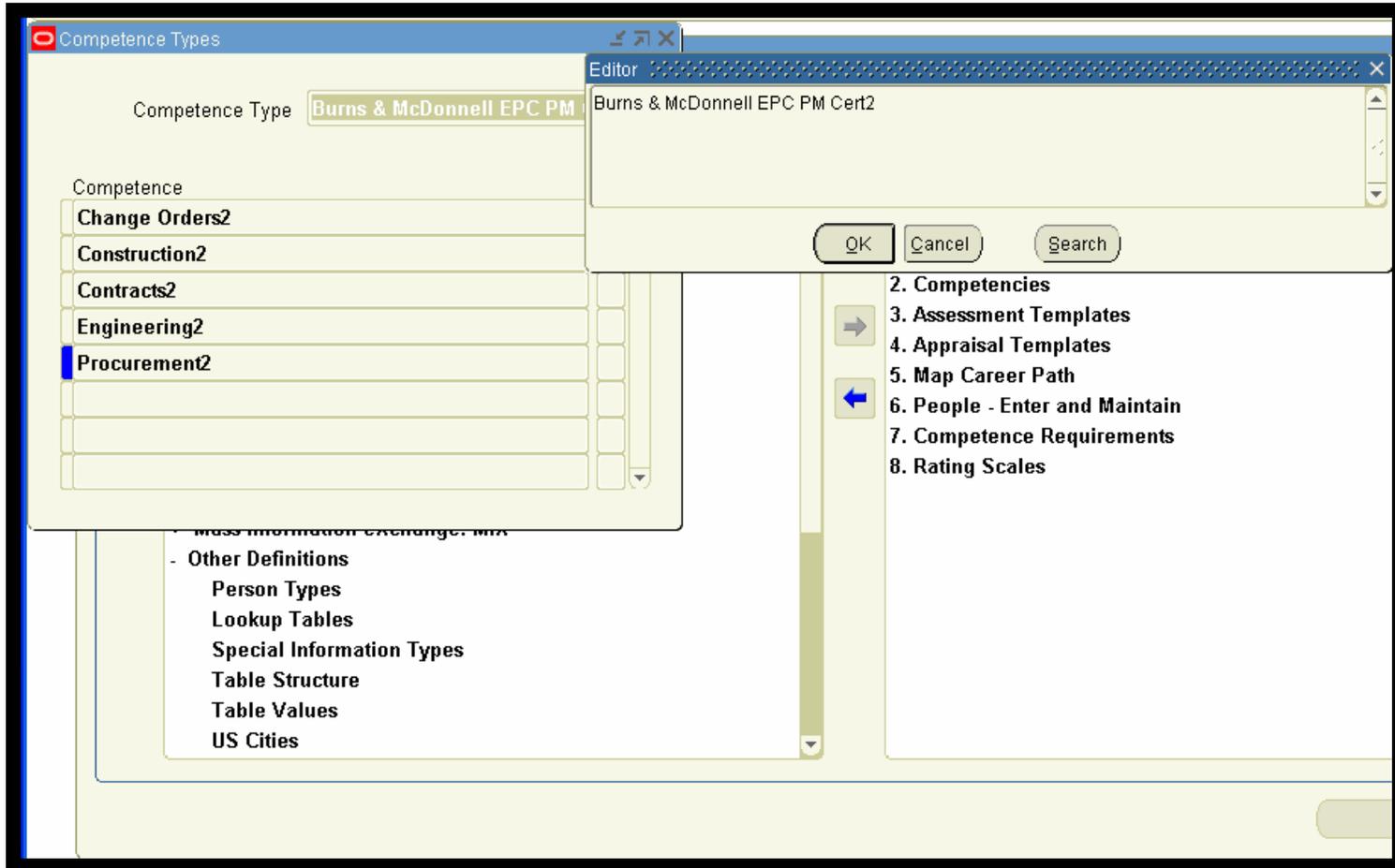
Primary Evaluation Method **Training Course** Certification Required

Renewal Period Units

Behavioral Indicator

There are three training courses that need to be completed in ADDITION TO a successful interview with a Subject Matter Expert.

3. Competence Type



4. Assessment Template

Assessment Template

Name In Use

Description

Instructions

Dates

From

To

Rating Scale

Type

Performance Scale

Comments

Weighting Scale

Comments

Total Score []

5. Assessment Competencies

Assessment Template

Competence Details

Display Template Context

Saved Competence Types Only

Saved Competencies Only

Competence Type **Burns & McDonnell EPC PM Cert2**

Use		
-----	--	--

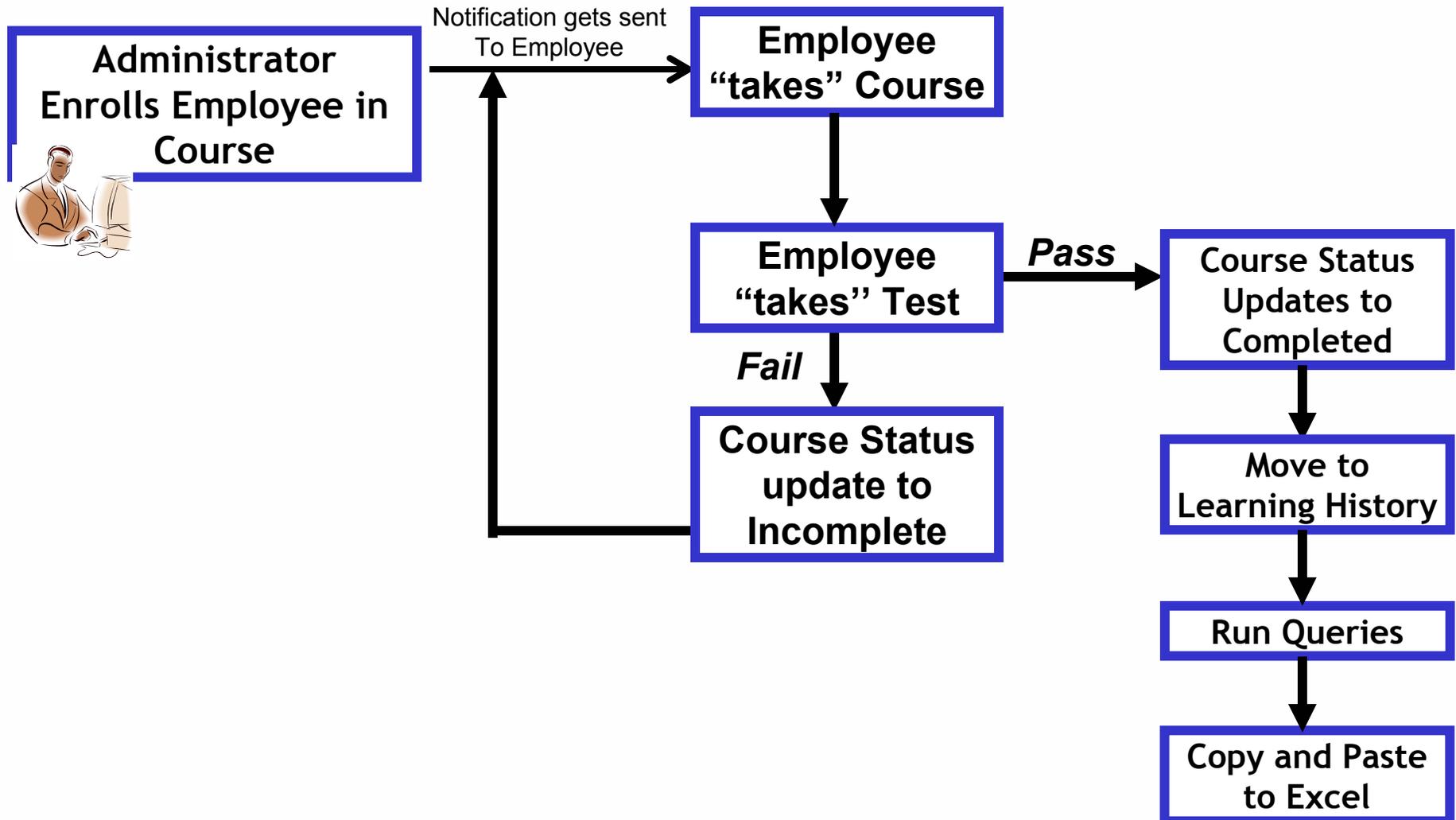
Qualification

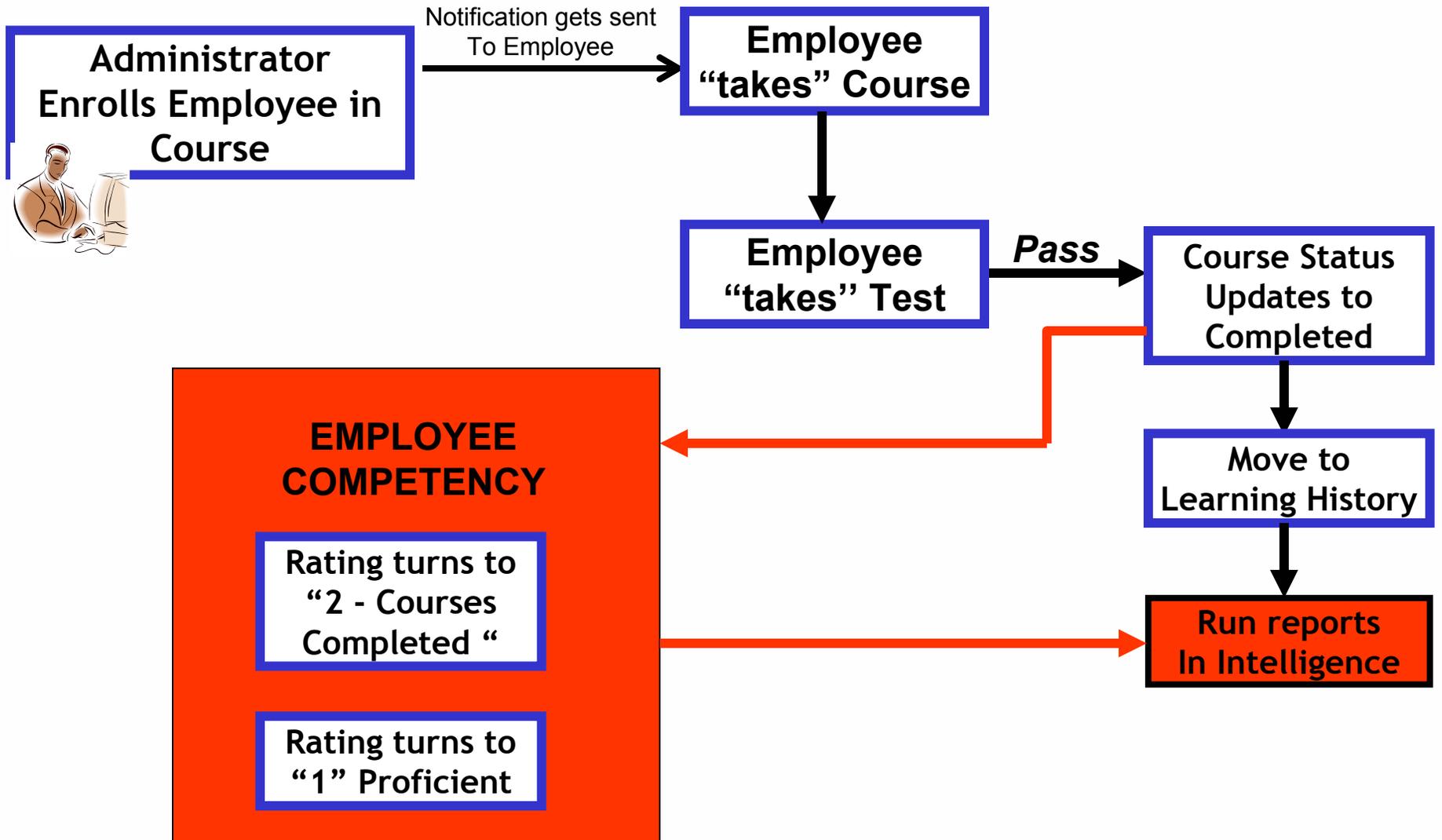
Competencies

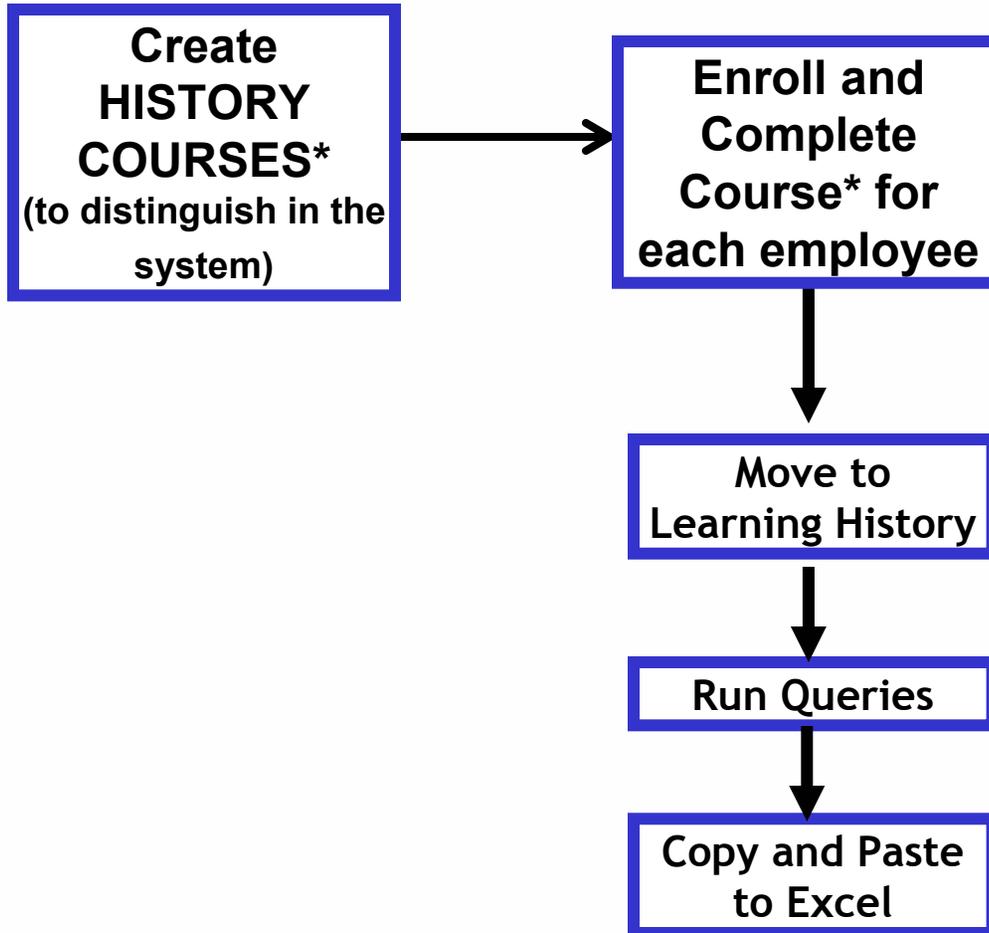
Competency	Use	Sequence		
<input type="checkbox"/> Change Orders2	<input checked="" type="checkbox"/>	<table border="1"><tr><td></td><td></td></tr></table>		
<input type="checkbox"/> Construction2	<input checked="" type="checkbox"/>	<table border="1"><tr><td></td><td></td></tr></table>		
<input type="checkbox"/> Contracts2	<input checked="" type="checkbox"/>	<table border="1"><tr><td></td><td></td></tr></table>		
<input type="checkbox"/> Engineering2	<input checked="" type="checkbox"/>	<table border="1"><tr><td></td><td></td></tr></table>		
<input checked="" type="checkbox"/> Procurement2	<input checked="" type="checkbox"/>	<table border="1"><tr><td></td><td></td></tr></table>		
<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><tr><td></td><td></td></tr></table>		

Competence Dates

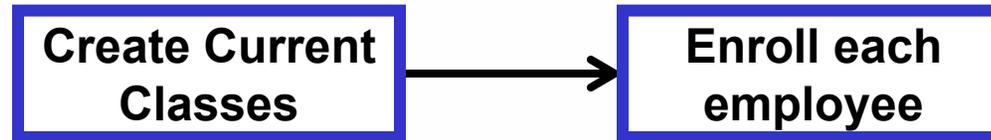
From **20-JUN-2007** To







*** SOURCE: Spreadsheets from Corporate and Professional Services**



*** SOURCE: Spreadsheets from Corporate and Professional Services**