

# Getting Started With Profiles

A Guide for getting started with User Profiles

Version 2024

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# GETTING STARTED WITH PROFILES

## INTRODUCTION

Encompassing Visions User IDs are granted permissions to specific modules and functions of the system. These permissions determine which functions the user can see on their *Application Menu*. In order to simplify the maintenance of this access, *User Profiles* were introduced to the system with Version 8.5. *User Profiles* allow for a consistent level of access to be assigned to multiple users so that you maintain the profile instead of the individual users when the application changes (e.g. you start using a new module) rather than all the individual users within your organization. For each user in the application, a profile can be assigned. When the user's responsibilities change (e.g. they are now a lead and need to be able to view the *Analysis* functions) you simply change the user's profile.

For example, you may create a profile called *Employee Reviews* and another called *Leader Reviews*. You can set up the *Employee Reviews* profile with just access to the **Complete Reviews** function and assign this profile to all of the non-leader employees in the system. The only module they will see in their navigation bar is **Employees** and the only function in sub-menu will be **Complete Reviews**. You can set up the *Leader Reviews* profile with **Complete Reviews** and **Print Learning and Growth Reports** and assign this profile to all the leaders in the system. This will allow all leads to **complete reviews** (just like the *Employee Reviews* profile) and give them access to print **Supervisory Learning and Growth Reports** function under the **Employees** in the navigation bar. You may also want to give access to the Employees to print their Incumbent Review.

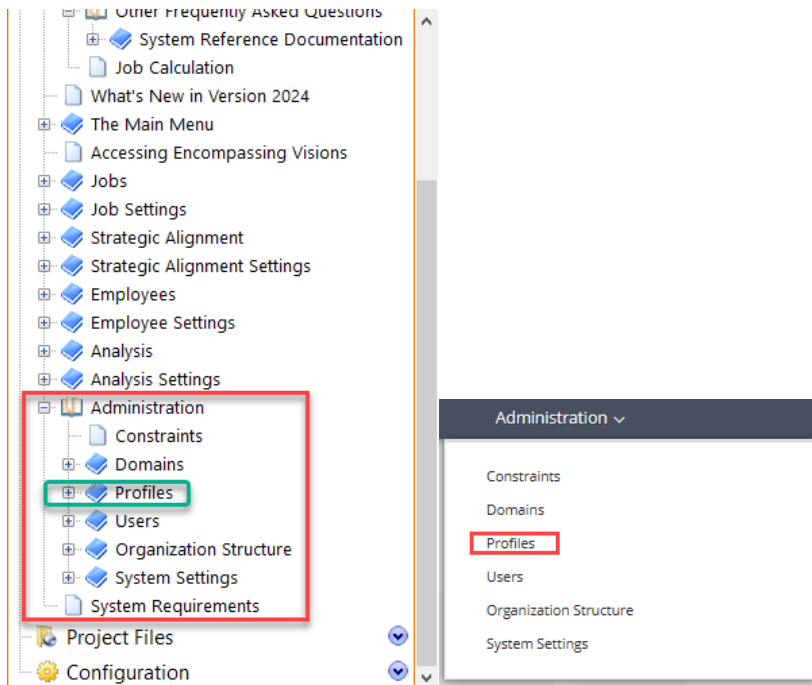
Client Relations ([Crelations@encv.com](mailto:Crelations@encv.com)) can also assist with any revisions to the User Profiles that you may need to make to suit the access required for your organization.

The Help within Encompassing Visions provides additional information about maintaining user and profiles along with examples of some common user scenarios. In the Help, look under **Administration > Profiles**.

## DEFAULT PROFILES

We have included nine different default profiles that we feel will fit most organizations. You can add, update, or delete these profiles as appropriate to your organization. We will not ever make any modifications to these existing profiles in our upgrade process unless it is to remove modules from the system or add new modules (in which case we would set access levels to zero and remind you to update your profiles as part of the release notes for the update).

Profiles are modified through **Administration>Profiles**. Double click on the profile you would like to modify.



Please note: Profiles were updated for this release. You may not have some of these profiles that are noted below.

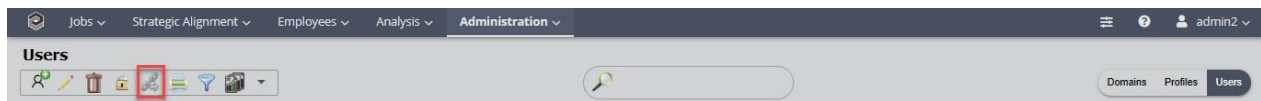
### A1 – User Assigned Jobs

This profile provides user access to the Application Menu and the Jobs function.

#### **Jobs – User Assigned Jobs.**



This profile assumes that you have established specific jobs for the user to enter a questionnaire or other job details for in the Administrative function **Link Jobs to Users**. This access allows the user to add or update the jobs linked to their user ID.



You would assign this Profile to Users who are assisting your evaluation committee and who have been given responsibility for entering a questionnaire or job details for specific jobs only (*typically their own*). If you have an evaluation committee who is responsible for entering all of the information about the job, then you will probably want to change this profile to provide access to the Jobs functions **Jobs** and **Print Job Reports** and not to the **Jobs – User**

**Assigned Jobs.** You could also create a new profile that you assigned to these Job Evaluation Committee users.

Profile Details for A1 - User Assigned Jobs (UAJ) ✕

Profile Id: A1

Profile Name: A1 - User Assigned Jobs (UAJ)

Description: This Profile enables Users to share in the creation and updating of information about Job accountabilities and technical skills. It also enables the independent completion of the JPS Job Questionnaire so each User's questionnaire responses can be factored (averaged) into an overall understanding of job-specific Skill, Effort, Responsibility and Working Conditions.

---

Menu Item	
Able to Log In?	Y Y Y Y <b>Y</b> N
Jobs	5 4 3 2 1 <b>N/A</b>
User Assigned Jobs	5 4 <b>3</b> 2 1 N/A
Print Job Reports	5 4 3 2 1 N/A
Print Certifications	1 N

### A2 - Read/Print Non-Confidential Job Descriptions

This profile provides user access to the Application Menu and the Jobs function **Jobs**.



When applied at the **'System-Wide'** level, this Profile enables Users to read and print all **'Non-Confidential'** Job Descriptions from anywhere within the organization.

If Domain functionality has been enabled, this Profile will enable Users to read and print all **'Non-Confidential'** Job Descriptions within the assigned Domain.

JobRef	Job Title	Reports	Land Group	Job Family	Job Group	Benchmark	Complete	Active	Confidential	Approved	Approved Date
000020	Administrative Coordinator	Staff & Mgmt Docs		Administrative Support	Administration		✓	✓		✓	2022-12-23
000020COPY	Administrative Coordinator	Job Description		not applicable	Administration		✓	✓		✓	2022-12-23
0025	Court Clerk			Administrative Support	Administration		✓	✓		✓	2022-11-07

Profile Details for A2 - Read/Print Non-Confidential Job Descriptions

Profile Id: A2

Profile Name: A2 - Read/Print Non-Confidential Job Descriptions

Description: When applied at the 'System-Wide' level, this Profile enables Users to read and print all 'Non-Confidential' Job Descriptions from anywhere within the organization. If Domain functionality has been enabled, this Profile will enable Users to read and print all 'Non-Confidential' Job Descriptions within the assigned Domain.

Menu Item

Able to Log In?	Y	Y	Y	Y	Y	N
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A

## A2A - UAJ and Read/Print Non-Confidential JD's

The screenshot shows a dark-themed navigation bar with a 'Jobs' dropdown menu. The dropdown is open, showing two options: 'Jobs' and 'User Assigned Jobs', with the latter being highlighted.

When applied at the '**System-Wide**' level, this Profile enables Users to review/edit/provide input on specific jobs and read/print all 'Non-Confidential' **Job Descriptions** from anywhere within the organization.

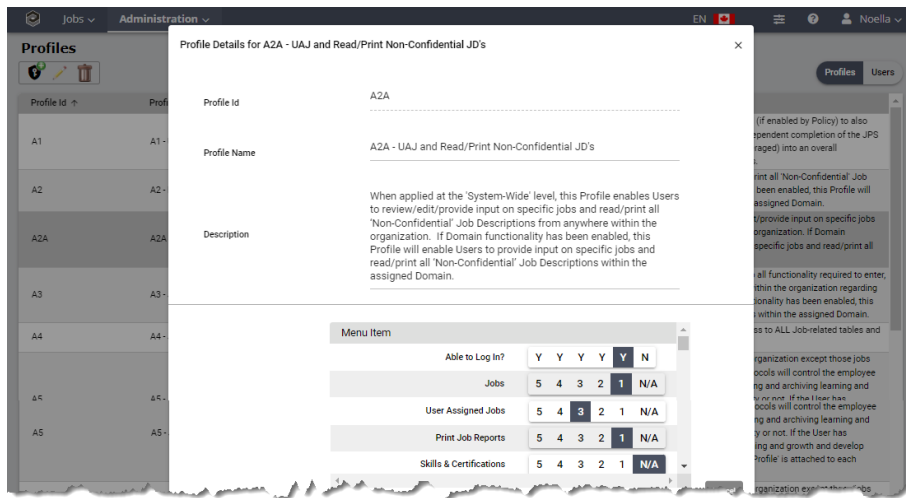
If Domain functionality has been enabled, this Profile will enable Users to provide input on specific jobs and read/print all 'Non-Confidential' **Job Descriptions** within the assigned Domain.

The screenshot shows a table of jobs with a 'Reports' dropdown menu open. The table has columns for JobRef, Job Title, Reports, Job Group, Job Family, Job Group, Benchmark, Complete, Active, Confidential, Approved, and Approved Date. The dropdown menu shows options for 'Staff & Mgmt Docs' and 'Job Description'.

JobRef	Job Title	Reports	Job Group	Job Family	Job Group	Benchmark	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs	UPE 67	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Job Description	UPE 67	Finance / Assessment	Administration		✓	✓	✓	✓	2022-09-26
0046A	Accounting Analyst Jr.		UPE 67	Finance / Assessment	Administration	✓	✓	✓	✓	✓	2022-04-14
0047	Accounts Payable Clerk		Inside Workers CUPE 67	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant		EXEMPT	Administrative Support	Administration		✓	✓	✓	✓	2022-01-13

The screenshot shows a table of user assigned jobs. The table has columns for JobRef, Job Title, Reports, Job Group, Job Family, Job Group, Benchmark, Complete, Active, Confidential, Approved, and Approved Date. The dropdown menu shows options for 'Staff & Mgmt Docs' and 'Job Description'.

JobRef	Job Title	Reports	Job Group	Job Family	Job Group	Benchmark	Complete	Active	Confidential	Approved	Approved Date
0001RPS	Crime Analyst	Staff & Mgmt Docs		Safety/Law/Enforcement	Operations		✓	✓	✓	✓	2022-11-22



### A3 – Job Evaluator



When applied at the **'System-Wide'** level, this Profile enables Users **full access** to all functionality required to enter, evaluate, analyze and print reports associated with the evaluation of every job within the organization regarding their relative *Skill, Effort, Responsibility and Working Conditions*.

If Domain functionality has been enabled, this Profile will enable Users **full access** to all the same job evaluation functionalities within the assigned Domain

JobRef	Job Title	mark	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business		✓	✓		✓	2022-09-26
0046A	Accounting Analyst Jr.		✓	✓		✓	2022-04-14
0047	Accounts Payable Clerk		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant		✓	✓		✓	2022-01-13
0075A	Administrative Assistant		✓	✓		✓	2022-12-23
0077	Administrative Assistant, Council		✓	✓		✓	2022-12-23
0078	Administrative Assistant, General Manager		✓	✓		✓	2022-11-22
0075B	Administrative Assistant, Help Desk		✓	✓		✓	2022-04-10



Profile Details for A3 - Job Evaluator

Profile Id: A3

Profile Name: A3 - Job Evaluator

Description: When applied at the 'System-Wide' level, this Profile enables Users full access to all functionality required to enter, evaluate, analyze and print reports associated with the evaluation of every job within the organization regarding their relative Skill, Effort, Responsibility and Working Conditions. If Domain functionality has been enabled, this Profile will enable Users full access to all the same job evaluation functionalities within the assigned Domain.

Menu Item	Y	Y	Y	Y	Y	N
Able to Log In?	Y	Y	Y	Y	Y	N
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A
Competency Alignment Survey	5	4	3	2	1	N/A

### A4 – Job Evaluation System Administrator

This Profile should only be applied at the '**System-Wide**' level as it provides access to **ALL** Job-related tables and functionalities required in the configuration of the software database.

The screenshot shows a web application interface. At the top, there is a navigation bar with 'Jobs' and 'Administration' dropdown menus. The 'Administration' dropdown is open, showing a list of options: Constraints, Profiles, Users, Organization Structure, and System Settings. In the top right corner, there is a green button labeled 'CHANGE PASSWORD'. The user's name 'Doug' is also visible in the top right corner.

Profile Id: A4

Profile Name: A4 - Job Evaluation System Administrator

Description: This Profile should only be applied at the 'System-Wide' level as it provides access to ALL Job-related tables and functionalities required in the configuration of the software database.

Menu Item	5	4	3	2	1	N/A
Able to Log In?	Y	Y	Y	Y	Y	N
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A
Competency Alignment Survey	5	4	3	2	1	N/A
Competency Alignment Survey Results	5	4	3	2	1	N/A
Organizational Objectives	5	4	3	2	1	N/A
Employees	5	4	3	2	1	N/A
Employee Skills Access	5	4	3	2	1	N/A
Business Objectives	5	4	3	2	1	N/A
Personal Development Plans	5	4	3	2	1	N/A
Complete Reviews	5	4	3	2	1	N/A
Reviewer Notifications	5	4	3	2	1	N/A
Print Learning and Growth Reports	5	4	3	2	1	N/A
Archived Learning and Growth Reports	5	4	3	2	1	N/A
Organizational Learning and Growth	5	4	3	2	1	N/A
Succession Planning	5	4	3	2	1	N/A
Constraints	5	4	3	2	1	N/A
Policies	5	4	3	2	1	N/A
Objective Field Configurations	5	4	3	2	1	N/A
Domains/Profiles/Users	5	4	3	2	1	N/A
Organization Structure	5	4	3	2	1	N/A
Job/Learning and Growth Report Options	5	4	3	2	1	N/A
Job Evaluation Questions	5	4	3	2	1	N/A
Competencies	5	4	3	2	1	N/A
Learning and Growth Ratings	5	4	3	2	1	N/A
Characteristic Tooltips	5	4	3	2	1	N/A
Core Tables	5	4	3	2	1	N/A
Job Level	5	4	3	2	1	N/A
Data Integration & Import	5	4	3	2	1	N/A



### A5 – Jobs, Learning and Growth, and Analysis

This Profile enables Users to read and print **Job Descriptions** for any job in the organization except those jobs identified and flagged as **'CONFIDENTIAL'**.

With this Profile, *system security protocols* will control the employee names that appear on related screens for creating, completing, approving, printing and archiving learning and growth reviews/reports based on whether the User has **supervisory** responsibility or not.

If the User has **supervisory** responsibilities, this Profile will also enable them to view team learning and growth and develop training plans for subordinate personnel.

**NOTE:**

Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

**Profile Id** A5

**Profile Name** A5 - Jobs, Learning and Growth, and Analysis

**Description**

This Profile enables Users to read and print Job Descriptions for any job in the organization except those jobs identified and flagged as 'CONFIDENTIAL'. With this Profile, system security protocols will control the employee names that appear on related screens for creating, completing, approving, printing and archiving learning and growth reviews/reports based on whether the User has supervisory responsibility or not. If the User has supervisory responsibilities, this Profile will also enable them to view team learning and growth and develop training plans for subordinate personnel.

**NOTE**  
Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Menu Item	Y	Y	Y	Y	Y	N
Able to Log In?	Y	Y	Y	Y	Y	N
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A
Competency Alignment Survey	5	4	3	2	1	N/A
Competency Alignment Survey Results	5	4	3	2	1	N/A
Organizational Objectives	5	4	3	2	1	N/A
Employees	5	4	3	2	1	N/A
Employee Skills Access	5	4	3	2	1	N/A
Business Objectives	5	4	3	2	1	N/A
Personal Development Plans	5	4	3	2	1	N/A
Complete Reviews	5	4	3	2	1	N/A
Reviewer Notifications	5	4	3	2	1	N/A
Print Learning and Growth Reports	5	4	3	2	1	N/A
Archived Learning and Growth Reports	5	4	3	2	1	N/A
Organizational Learning and Growth	5	4	3	2	1	N/A
Succession Planning	5	4	3	2	1	N/A
Constraints	5	4	3	2	1	N/A
Policies	5	4	3	2	1	N/A
Objective Field Configurations	5	4	3	2	1	N/A
Domains/Profiles/Users	5	4	3	2	1	N/A
Organization Structure	5	4	3	2	1	N/A
Job/Learning and Growth Report Options	5	4	3	2	1	N/A
Job Evaluation Questions	5	4	3	2	1	N/A
Competencies	5	4	3	2	1	N/A
Learning and Growth Ratings	5	4	3	2	1	N/A
Characteristic Tooltips	5	4	3	2	1	N/A
Core Tables	5	4	3	2	1	N/A
Job Level	5	4	3	2	1	N/A
Data Integration & Import	5	4	3	2	1	N/A

## Supervisory

The screenshot shows a user interface with a top navigation bar containing 'Jobs', 'Employees', and 'Analysis'. A dropdown menu is open under 'Employees', listing several options: 'Jobs', 'Employees', 'Organizational Learning and Growth', 'Business Plan', 'Personal Development Plan', 'Complete/Print Reviews', and 'Archived Learning and Growth Reports'. In the top right corner, there is a user profile for 'Amanda' and a green 'CHANGE PASSWORD' button.

JobRef	Job Title	Reports	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Job Description	Finance / Assessment	Administration		✓	✓		✓	2022-09-26
0047	Accounts Payable Clerk		Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23
0077	Administrative Assistant, Council	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23

Name	Id	Role	Type	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Edwardson, Phil	000041	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	In Progress			1886
Gerber, Sally	0000237	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Giesbrecht, Tiffany	TIFFANY	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Johnson, Amanda J.	000015	INCUMBENT	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Roberts, Bruce G.	000029	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Sorge, Nicole	000051	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

## Non-Supervisory



JobRef	Job Title	Reports	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Job Description	Finance / Assessment	Administration		✓	✓		✓	2022-09-26
0047	Accounts Payable Clerk		Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23

Name	Id	Role	Type	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Raynard, Bertha	000298	INCUMBENT	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

## A5A: Jobs, Learning and Growth, Analysis and CAS

This Profile enables Users to read and print **Job Descriptions** for any job in the organization except those jobs identified and flagged as '**CONFIDENTIAL**'.

With this Profile, *system security* protocols will control the employee names that appear on related screens for creating, completing, approving, printing and archiving learning and growth reviews/reports based on whether the User has **supervisory** responsibility or not.

If the User has **supervisory** responsibilities, this Profile will also enable them to view team learning and growth and develop training plans for subordinate personnel.

The A5A Profile also enables Users to complete the **Competency Alignment Survey**, an effective tool for understanding stakeholder perceptions about organizational values.

**NOTE:**

Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Profile Details for A5A - Jobs, Learning and Growth, Analysis, CAS

Profile Id: A5A

Profile Name: A5A - Jobs, Learning and Growth, Analysis, CAS

Description: This Profile enables Users to read and print Job Descriptions for any job in the organization except those jobs identified and flagged as 'CONFIDENTIAL'. With this Profile, system security protocols will control the employee names that appear on related screens for creating, completing, approving, printing and archiving learning and growth reviews/reports based on whether the User has supervisory responsibility or not. If the User has supervisory responsibilities, this Profile will also enable them to view team learning and growth and develop training plans for subordinate personnel. The A5A Profile also enables Users to complete the Competency Alignment Survey, an effective tool for understanding stakeholder perceptions about organizational values.

NOTE: Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Menu Item	5	4	3	2	1	N/A
Able to Log In?	Y	Y	Y	Y	Y	N
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A
Competency Alignment Survey	5	4	3	2	1	N/A
Competency Alignment Survey Results	5	4	3	2	1	N/A
Organizational Objectives	5	4	3	2	1	N/A
Employees	5	4	3	2	1	N/A
Employee Skills Access	5	4	3	2	1	N/A
Business Objectives	5	4	3	2	1	N/A
Personal Development Plans	5	4	3	2	1	N/A
Complete Reviews	5	4	3	2	1	N/A
Reviewer Notifications	5	4	3	2	1	N/A
Print Learning and Growth Reports	5	4	3	2	1	N/A
Archived Learning and Growth Reports	5	4	3	2	1	N/A
Organizational Learning and Growth	5	4	3	2	1	N/A
Succession Planning	5	4	3	2	1	N/A
Constraints	5	4	3	2	1	N/A
Policies	5	4	3	2	1	N/A
Objective Field Configurations	5	4	3	2	1	N/A
Domains/Profiles/Users	5	4	3	2	1	N/A
Organization Structure	5	4	3	2	1	N/A
Job/Learning and Growth Report Options	5	4	3	2	1	N/A
Job Evaluation Questions	5	4	3	2	1	N/A
Competencies	5	4	3	2	1	N/A
Learning and Growth Ratings	5	4	3	2	1	N/A
Characteristic Tooltips	5	4	3	2	1	N/A
Core Tables	5	4	3	2	1	N/A
Job Level	5	4	3	2	1	N/A
Data Integration & Import	5	4	3	2	1	N/A



# Supervisory

Jobs Strategic Alignment Employees Analysis Sally

Jobs Competency Alignment Survey Employees Organizational Learning and Growth  
 Business Plan  
 Personal Development Plan  
 Complete/Print Reviews  
 Archived Learning and Growth Reports

Jobs Strategic Alignment Employees Analysis Sally

**Complete/Print Reviews**

Review Dates: From 2023-01-01 To 2023-12-31 View: Print Review-to-date for Selected Review

Name	Id	Role	Type	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Anitas, Salvador	APOC2	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Gerber, Sally	0000237	INCUMBENT	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Perras, Glenn	000057	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

Jobs Strategic Alignment Employees Analysis Sally

**Competency Alignment Survey**

Sally Gerber  
 Survey: 2023-04-11  
 Management

05 Teamwork  
 Working with others to share expertise and achieve outcomes that benefit the organization; stepping in to fill necessary roles that others are unable or unwilling to do; demonstrating strong communication skills to others on the team through active listening, summarizing, facilitating and "bridge building"...

In your opinion, what importance does the organization place on this competency?

1  2  3  4  5  6  7  8  9  10

Not Important at all Extremely Important

Jump To: 1 2 3 4 **5** 6 7 8 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38

Auto-Scroll

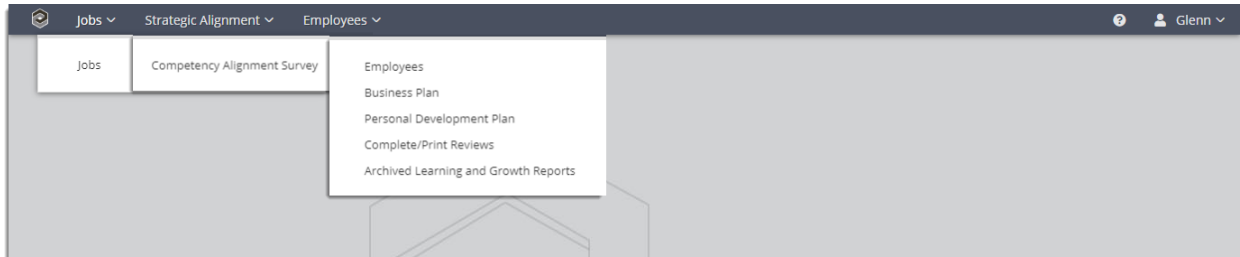
Jobs Strategic Alignment Employees Analysis Sally

**Jobs**

Active Jobs Only All Jobs

JobRef	Job Title	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Finance / Assessment	Administration		✓	✓	✓	✓	2022-09-26
0047	Accounts Payable Clerk	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	<b>Administrative Assistant</b>	<b>EXEMPT</b>	<b>Administrative Support</b>	<b>Administration</b>	✓	✓		✓	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support	Administration	✓	✓		✓	2022-12-23
0077	Administrative Assistant, Council	EXEMPT	Administrative Support	Administration	✓	✓		✓	2022-12-23
0078	Administrative Assistant, General Manager	EXEMPT	Administrative Support	Administration	✓	✓		✓	2022-11-22
0075B	Administrative Assistant, Help Desk	EXEMPT	Administrative Support	Administration	✓	✓		✓	2022-04-10
000020	Administrative Coordinator	EXEMPT	Administrative Support	Administration	✓	✓		✓	2022-12-23

# Non-Supervisory



Jobs

Active Jobs Only | All Jobs

JobRef	Job Title	Reports	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Job Description	Finance / Assessment	Administration		✓	✓		✓	2022-09-26
0047	Accounts Payable Clerk		Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23
0077	Administrative Assistant, Council	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23
0077A	Administrative Assistant, Council Manager	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23

Competency Alignment Survey

Glenn Perras

Survey: 2023-04-11  
Technical / Advisory

10 Questions Remaining

**05 Teamwork**

Working with others to share expertise and achieve outcomes that benefit the organization; stepping in to fill necessary roles that others are unable or unwilling to do; demonstrating strong communication skills to others on the team through active listening, summarizing, facilitating and "bridge building"...

In your opinion, what importance does the organization place on this competency?

1  
  2  
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  6  
  7  
  8  
  9  
  10

Not Important at all Extremely Important

Jump To: 1 2 3 4 **5** 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38

Auto-Scroll

Complete/Print Reviews

Review Dates: From 2023-01-01 To 2023-12-31 View: Print Review-to-date for Selected Review

Name	Id	Role	Type	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Perras, Glenn	000057	INCUMBENT	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

## A6 – Jobs and Employee: Comprehensive

This Profile enables Users to read **Job Descriptions** for any job in the organization including those identified and flagged as '**CONFIDENTIAL**'.

It enables Users to view the technical skills attached to their employee profile in ENCV, to create, complete, approve, print and archive learning and growth reviews/reports, and to complete the **Competency Alignment Survey** - an effective tool for understanding stakeholder perceptions about organizational values.

With this Profile, *system security* protocols will further enable User's to update the technical skills of others anywhere in the organization.

With **lead** responsibilities, Users with this Profile will also be able to view organizational learning and growth and develop training plans for subordinate personnel.

### NOTE:

Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Profile Details for A6 - Jobs and Employees: Comprehensive

Profile Id: A6

Profile Name: A6 - Jobs and Employees: Comprehensive

Description: This Profile enables Users to read Job Descriptions for any job in the organization including those identified and flagged as 'CONFIDENTIAL'. It enables Users to view the technical skills attached to their employee profile in ENCV, to create, complete, approve, print and archive learning and growth reviews/reports, and to complete the Competency Alignment Survey - an effective tool for understanding stakeholder perceptions about organizational values. With this Profile, system security protocols will further enable User's to update the technical skills of others anywhere in the organization. With lead responsibilities, Users with this Profile will also be able to view organizational learning and growth and develop training plans for subordinate personnel.

NOTE: Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Menu Item	5	4	3	2	1	N/A
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A
Competency Alignment Survey	5	4	3	2	1	N/A
Competency Alignment Survey Results	5	4	3	2	1	N/A
Organizational Objectives	5	4	3	2	1	N/A
Employees	5	4	3	2	1	N/A
Employee Skills Access	5	4	3	2	1	N/A
Business Objectives	5	4	3	2	1	N/A
Personal Development Plans	5	4	3	2	1	N/A
Complete Reviews	5	4	3	2	1	N/A
Reviewer Notifications	5	4	3	2	1	N/A
Print Learning and Growth Reports	5	4	3	2	1	N/A
Archived Learning and Growth Reports	5	4	3	2	1	N/A
Organizational Learning and Growth	5	4	3	2	1	N/A
Succession Planning	5	4	3	2	1	N/A
Constraints	5	4	3	2	1	N/A
Policies	5	4	3	2	1	N/A
Objective Field Configurations	5	4	3	2	1	N/A
Domains/Profiles/Users	5	4	3	2	1	N/A
Organization Structure	5	4	3	2	1	N/A
Job/Learning and Growth Report Options	5	4	3	2	1	N/A
Job Evaluation Questions	5	4	3	2	1	N/A
Competencies	5	4	3	2	1	N/A
Learning and Growth Ratings	5	4	3	2	1	N/A
Characteristic Tooltips	5	4	3	2	1	N/A
Core Tables	5	4	3	2	1	N/A
Job Level	5	4	3	2	1	N/A
Data Integration & Import	5	4	3	2	1	N/A



# Supervisory

The screenshot shows the top navigation bar with the following tabs: Jobs, Strategic Alignment, Employees, and Analysis. The 'Employees' dropdown menu is open, showing options: Jobs, Competency Alignment Survey, Business Plan, Personal Development Plan, Complete/Print Reviews, and Archived Learning and Growth Reports.

The screenshot shows a table of jobs with a 'Reports' dropdown menu open. The table has columns: JobRef, Job Title, Job Family, Job Group, Criteria, Complete, Active, Confidential, Approved, and Approved Date. The 'Reports' menu shows 'Staff & Mgmt Docs' (67) and 'Job Description'.

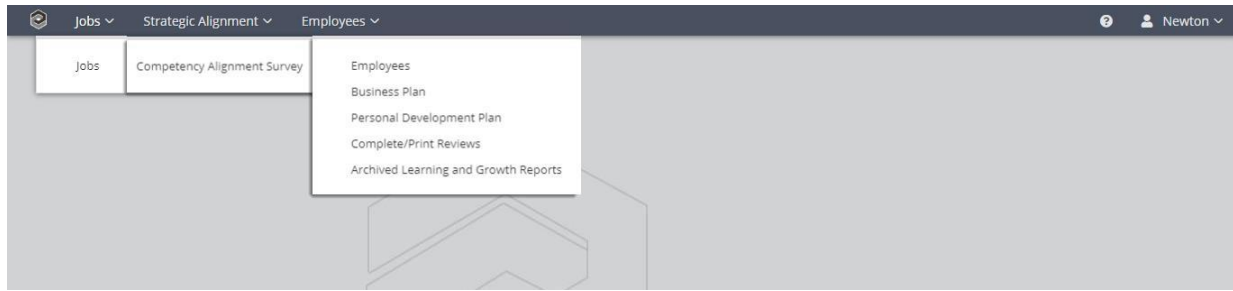
JobRef	Job Title	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Finance / Assessment	Administration		✓	✓		✓	2022-09-26
0047	Accounts Payable Clerk	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant	EXEMPT	Administrative Support		✓	✓		✓	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support		✓	✓		✓	2022-12-23

The screenshot shows a 'Competency Alignment Survey' for Brady Gerrard. The survey is titled '05 Teamwork' and includes a description: 'Working with others to share expertise and achieve outcomes that benefit the organization; stepping in to fill necessary roles that others are unable or unwilling to do; demonstrating strong communication skills to others on the team through active listening, summarizing, facilitating and "bridge building"...'. Below the description is a question: 'In your opinion, what importance does the organization place on this competency?' with a scale from 1 (Not Important at all) to 10 (Extremely Important). The current selection is 5. There are 10 questions remaining.

The screenshot shows a table titled 'Complete/Print Reviews' with columns: Name, Id, Role, Type, Start Date, End Date, Due Date, Status, Completed Date, Locked, and Review Id. The table lists several reviews for supervisors, all with a status of 'Not Started'.

Name	Id	Role	Type	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Chase, Noella	0000051	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Demeter, Susan	000280	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Gerrard, Brady	000281	INCUMBENT	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Smith, Nicole	TUSER	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
Weintz, Joshua	000022	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			
White, Andrea	000038	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

# Non-Supervisory



Jobs Strategic Alignment Employees

Jobs

Active Jobs Only All Jobs

JobRef	Job Title	Reports	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs 67	Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0046FCOPY	Accounting Analyst - Business	Job Description	Finance / Assessment	Administration		✓	✓		✓	2022-09-26
0047	Accounts Payable Clerk		Finance / Assessment	Administration		✓	✓	✓	✓	2022-12-23
0075	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support	Administration		✓	✓		✓	2022-12-23

Jobs Strategic Alignment Employees

### Competency Alignment Survey

Newton Minsky

Survey: 2023-04-11  
Administration

10 Questions Remaining

#### 05 Teamwork

Working with others to share expertise and achieve outcomes that benefit the organization; stepping in to fill necessary roles that others are unable or unwilling to do; demonstrating strong communication skills to others on the team through active listening, summarizing, facilitating and "bridge building"...

In your opinion, what importance does the organization place on this competency?

1   
  2   
  3   
  4   
  5   
  6   
  7   
  8   
  9   
  10

Not Important at all Extremely Important

Jump To: 1 2 3 4 **5** 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38

Auto-Scroll

Jobs Strategic Alignment Employees

### Complete/Print Reviews

Actions: [Icons]

Review Dates: From 2023-01-01 To 2023-12-31

View: Print Review-to-date for Selected Review

Name	Id	Role	Type	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Minsky, Newton	000288	INCUMBENT	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

## A7 – Administrator

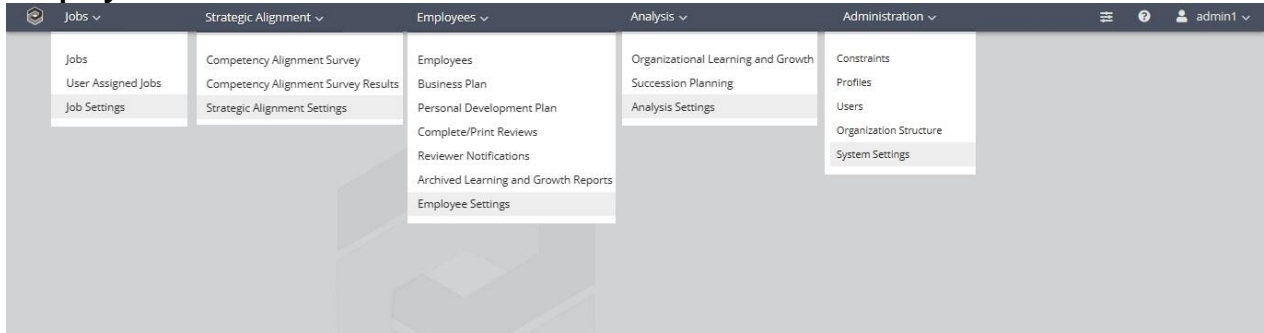
This Profile allows Users access to **every module** in the software system, including those related to **system configurations** and **'Confidential'** information.

In addition to customizing data tables, input screens, factor weights and managing data import activities, this profile enables User's to access/update all Employee information in **ENCV**, access/identify organization-wide training needs and access/conduct succession planning activities.

As such, assignment of this Profile should be restricted to very few within the organization, and only those trained and certified as an **Encompassing Visions™ System Administrator**.

NOTE:

Please ensure the appropriate **'Profile'** is attached to each *Employee Id* and *Name* in the **'Employees'** module.



You would assign this Profile to your **Administrative Staff** who are responsible for maintenance of the application.

Profile Details for A7 - Encompassing Visions System Administrator

Profile Id: A7

Profile Name: A7 - Encompassing Visions System Administrator

Description: This Profile allows Users access to every module in the software system, including those related to system configurations and 'confidential' information. In addition to customizing data tables, input screens, factor weights and managing data import activities, this profile enables User's to access/update all Employee information in ENCV, access/identify organization-wide training needs and access/conduct succession planning activities. As such, assignment of this Profile should be restricted to very few within the organization, and only those trained and certified as an Encompassing Visions™ System Administrator.

NOTE: Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Menu Item	5	4	3	2	1	N/A
Able to Log In?	Y	Y	Y	Y	Y	N
Jobs	5	4	3	2	1	N/A
User Assigned Jobs	5	4	3	2	1	N/A
Print Job Reports	5	4	3	2	1	N/A
Skills & Certifications	5	4	3	2	1	N/A
Competency Alignment Survey	5	4	3	2	1	N/A
Competency Alignment Survey Results	5	4	3	2	1	N/A
Organizational Objectives	5	4	3	2	1	N/A
Employees	5	4	3	2	1	N/A
Employee Skills Access	5	4	3	2	1	N/A
Business Objectives	5	4	3	2	1	N/A
Personal Development Plans	5	4	3	2	1	N/A
Complete Reviews	5	4	3	2	1	N/A
Reviewer Notifications	5	4	3	2	1	N/A
Print Learning and Growth Reports	5	4	3	2	1	N/A
Archived Learning and Growth Reports	5	4	3	2	1	N/A
Organizational Learning and Growth	5	4	3	2	1	N/A
Succession Planning	5	4	3	2	1	N/A
Constraints	5	4	3	2	1	N/A
Policies	5	4	3	2	1	N/A
Objective Field Configurations	5	4	3	2	1	N/A
Domains/Profiles/Users	5	4	3	2	1	N/A
Organization Structure	5	4	3	2	1	N/A
Job/Learning and Growth Report Options	5	4	3	2	1	N/A
Job Evaluation Questions	5	4	3	2	1	N/A
Competencies	5	4	3	2	1	N/A
Learning and Growth Ratings	5	4	3	2	1	N/A
Characteristic Tooltips	5	4	3	2	1	N/A
Core Tables	5	4	3	2	1	N/A
Job Level	5	4	3	2	1	N/A
Data Integration & Import	5	4	3	2	1	N/A

## **CUSTOMIZING THE PROFILES**

You can customize the profiles in any way that suits your organization. There is no processing around the names of the profiles so default profiles can be deleted if not required by your organization.

### **Scenarios**

The following are some example scenarios where you may want to modify the existing user profiles or add new ones.

#### **Example #1**

You have decided that you are going to introduce the Competency Alignment Survey to your organization. You already have all of your employees and Leads assigned the **A5 Jobs, Learning and Growth, and Analysis** profile.

You can simply modify the **A5** profile to add *level 3* access to the **Competency Alignment Survey** function and they will now have the Strategic Alignment module show up on their menu with that function enabled or assign the **A5A** profile.

#### **Example #2**

You have been doing **Competency Reviews** for years and now you want to add **Work Plans**.

You will need to ensure that all of your profiles provide *level 3* access to the **Business Objectives and Professional Development Work Plans** functions and maybe to **View Unapproved Work Plans** as well (although that will be more useful to leaders than employees).

## **CONVERTING EXISTING ACCESS TO PROFILES**

You must review the default profiles and determine which works for you and what updates they would require.

Some logic that can be applied is:

- Any employee identified as a Job Evaluator could have their user updated to use the **A3 Job Evaluator** profile. This gives the User access to complete sample benchmark jobs from various areas of the organization, including those recognized as highly technical, administrative, and managerial in nature. The purpose is to build common understanding and consistency in how JET (as a team) will interpret the Questionnaire.
- Any employee who shares in the input of the job information could have their user updated to use the **A1 User Assigned Job** profile. This enables Users to share in the creation and updating of information about Job accountabilities and technical skills. It also enables the independent completion of the JPS Job Questionnaire so each User's questionnaire responses can be factored (averaged) into an overall understanding of job-specific Skill, Effort, Responsibility and Working Conditions.
- Any user that currently has *level 5* access to administrative functions could be changed to utilize profile **A7**.

Any other scenarios would be handled manually.

On the **user** maintenance screen, you can sort by the **profile ID** that is assigned to the user by clicking on the Profile column heading. That will sort all the users without profiles to the top and you can manually go through this list and see what the user should be updated to for a profile. This may identify new profiles you need to add or you may choose to leave these users without profiles and maintain their access rights manually.

