

# 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 submenu 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.

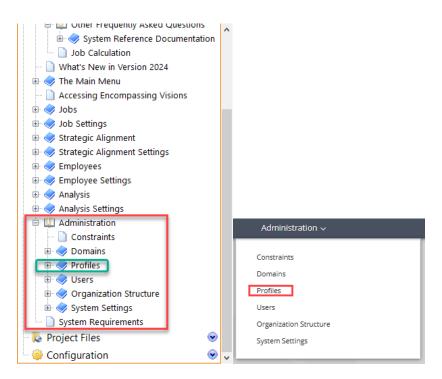
Client Relations (<u>Crelations@encv.com</u>) can also assist with any revisions to the User Profiles that you may need to make to suit the access required for your organization.

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 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										
A second second	a Contification of the State of	. /									

# A2 - Read/Print Non-Confidential Job Descriptions

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

٢	Jobs ~	8	💄 Amir 🗸
	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.

jobs 🤇	~										😧 💄 Amir -
Jobs											
🕑 👁 🤵 😰 📄 🚽 📋 🔎 🍸 🗮 🏭 (i) Active Jobs Only (i) All Jobs											
JobRef	Job Title	Reports 😡	Sand Group	Job Family	Job Group	Benchmark	Complete	Active	Confidential	Approved	Approved Date
000020	Administrative Coordinator	Staff & Mgmt Docs		Administrative Support	Administration		✓	~		1	2022-12-23
000020COPY	Administrative Coordinator	<ul> <li>Job Description</li> </ul>		not applicable	Administration		✓	1		1	2022-12-23
0025	Court Clerk			Administrative Support	Administration		1	1			2022-11-07

Profile Id	A2										
Profile Name	A2 - Read/Print Non-Confidentia	l Job i	Desc	ripti	ons						
Description	to read and print all 'Non-Confid- anywhere within the organization been enabled, this Profile will en	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										
		Y	Y	Y	Y	Y	Ν				
	Able to Log In?			3	2	1	N/A				
	Able to Log In? Jobs	5	4				Sec. 19				
		5 5	4	3	2	1	N/A				
	Jobs	-	4 4	3	2	1	N/A N/A	1.			

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

0	Jobs 🗸	8	💄 Andrea 🗸	l
	Jobs User Assigned Jobs			

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.

Jobs	· ~									3	🔋 💄 Andrea 🗸	
Jobs												
JobRef	Job Title	Reports 😡	Group	Job Family	Job Group	Benchmark	Complete	Active	Confidential	Approved	Approved Date	
0046	Accounting Analyst	Staff & Mgmt Docs	UPE 67	Finance / Assessment	Administration		4	1	1	1	2022-12-23	
0046FCOPY	Accounting Analyst - Business	Job Description	UPE 67	Finance / Assessment	Administration		1	1		1	2022-09-26	
0046A	Accounting Analyst Jr.	· Job Description	UPE 67	Finance / Assessment	Administration	1	4	1		1	2022-04-14	
0047	Accounts Payable Clerk	Inside Workers	CUPE 67	Finance / Assessment	Administration		1	1	1	✓	2022-12-23	
.0075	Administrative Assistant	EXEMPT	_ ~ ~ ~	Administrative Support	Administration			and a		- day	2022-01-13	

🤤 Jobs	s ~										0	🔒 Andrea 🗸
User Assi	igned Jobs											
/ 🤉 🛙	e 🔎 🏱 🚍	<ul> <li>Ac</li> </ul>	tive Jobs Only	O All Jobs								
JobRef	Job Title	Reports 😡	d Group	Job Family	Job Group	Benchmark	Complete	Active	Confidential	Approved	Aç	proved Date
0001RPS	Crime Analyst	Staff & Mgmt Docs		Safety/Law/Enforcement	Operations		1	1		1	2022-1	1-22

rofiles	f	Profile Details for A2A - U	AJ and Read/Print Non-Confidential JD's					×
9 / 11 Profile Id ↑	Profi	Profile Id	A2A					Profiles
A1	A1 -	Profile Name	A2A - UAJ and Read/Print Non-C	onfidential JD's				(if enabled by Policy) to also ependent completion of the JPS raged) into an overall i.
N2	A2 -		When applied at the 'System-Wid to review/edit/provide input on s				ers	rint all 'Non-Confidential' Job been enabled, this Profile will assigned Domain.
42A	A2A	Description	'Non-Confidential' Job Descriptio organization. If Domain function Profile will enable Users to proviv read/print all 'Non-Confidential' J	ns from anywh ality has been ( le input on spe	ere withi enabled, cific jobs	n the this ; and		t/provide input on specific jobs organization. If Domain specific jobs and read/print all
13	A3 -		assigned Domain.	ob Description	s within	une		all functionality required to ent ithin the organization regarding ionality has been enabled, this within the assigned Domain.
4	A4		Menu Item					ss to ALL Job-related tables and
			Able to Log In?	Y Y Y	YY	Ν		rganization except those jobs
			Jobs	5 4 3	2 1	N/A		ocols will control the employee ng and archiving learning and
.5	45-		User Assigned Jobs	5 4 3	2 1	N/A		ty or not. If the User has ocols will control the employee ng and archiving learning and
15	A5 -		Print Job Reports	5 4 3	2 1	N/A		y or not. If the User has
			Skills & Certifications	5 4 3	2 1	N/A		Ing and growth and develop Profile' is attached to each

# 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

🧿 🛛 Joi	bs 🗸								8	💄 Gordon 🗸
Jobs										
9 🦯	👷 🕫 🗋 🔄 🖹 🗊 🔎 🍞 🚍	Active Jobs Only	All Jobs							
JobRef	Job Title	Reports		6	mark	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Job Data Verification	Staff & Mgmt Docs	Evaluations & Analyses		1	~	1	1	2022-12-23
0046FCOPY	Accounting Analyst - Business	Ouestionnaire Responses	Job Description	Jobs Total Points Listing		√	1		1	2022-09-26
0046A	Accounting Analyst Jr.	<ul> <li>Questionnaire Responses</li> <li>Selection Rationale</li> </ul>	<ul> <li>Job Description</li> <li>Job Posting</li> </ul>	<ul> <li>Jobs Total Points Listing</li> <li>Jobs Ouestionnaire Cross Reference</li> </ul>		1	1		1	2022-04-14
0047	Accounts Payable Clerk	e Job Totals	<ul> <li>Selection Interview Guide</li> </ul>	<ul> <li>Jobs / Points Matrix</li> </ul>		1	1	1	1	2022-12-23
0075	Administrative Assistant	e Job Competencies	<ul> <li>Blank Job Questionnaire</li> </ul>	e Jobs Competency Cross Reference		1	1		1	2022-01-13
0075A	Administrative Assistant	<ul> <li>Job Questionnaire Cross Reference</li> </ul>		<ul> <li>Jobs Skills — Current Filter(s)</li> </ul>		1	1		1	2022-12-23
0077	Administrative Assistant, Council	e Job Audit		<ul> <li>Jobs Audit</li> </ul>		1	1		1	2022-12-23
0078	Administrative Assistant, General Manager	<ul> <li>Linked Employees</li> </ul>		<ul> <li>Incomplete Jobs Information</li> </ul>		1	1		1	2022-11-22
0075B	Administrative Assistant, Help Desk	EXEMPT	Administrative Support	Administration		1	1		1	2022-04-10

Profile Details for A3 - Job Evaluat	or	×
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 🔺	
	Able to Log In? 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	
مندس بعقر بمنعي البير	Competency Alignment Survey 5 4 3 2 1 N/A	J

# A4 – Job Evaluation System Administrator

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

0	Jobs 🗸 🛛 /	Administration 🗸	₽	0	💄 Doug 🗸
	Jobs Job Settings	Constraints Profiles Users	СНА	NGE P	ASSWORD
		Organization Structure System Settings			

#### Profile Details for A4 - Job Evaluation System Administrator

rofile Details for A4 - Job Eva	aluation System Administrator								;
Profile Id	Α4								
Profile Name	A4 - Job Evaluation System A	dministra	ator						
Description	This Profile should only be ap provides access to ALL Job-r required in the configuration	elated tal	bles	and	func	tion	level as it alities		
	Menu Item							*	
	Able to Log In?	Y	Y	Y	Y	Y	N		
	Jobs	5	4	3	2	1	N/A	Π.	
	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	_	4	3	2	1	N/A		
	Employee Skills Access	5	4	3	2	1	N/A		
	Business Objectives	_	4	3	2	1	N/A		
	Personal Development Plans		4	3	2	1	N/A		
	Complete Reviews	_	4	3	2	1	N/A		
	Reviewer Notifications	_	4	3	2	1	N/A		
	Print Learning and Growth Reports	_	4	3	2	1	N/A		
	Archived Learning and Growth Reports	_	4	3	2	1	N/A		
	Organizational Learning and Growth	_	4	3	2	1	N/A		
		_	-	-	_	-	_		
	Succession Planning	_	4	3	2	1	N/A		
	Constraints		4	3	2	1	N/A		
	Policies		4	3	2	1	N/A		
	Objective Field Configurations	_	4	3	2	1	N/A		
	Domains/Profiles/Users	_	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	-	
	4						ŀ		
									0

×

# 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 A	naly	sis				
Description	This Profile enables Users to re for any job in the organization e flagged as 'CONFIDENTIAL' we protocols will control the emplo- related screens for creating, co- and archimig learning and grow whether the User has superviso. User has supervisory responsab enable them to view team learn training plans for subordinate p NOTE Place ensure the appropriate if Employee Id and Name in the E	xcept h this yee na mpletii th revi th revi y resp lities, ng an ersonr	thos Prof ing, a ews ions this d gro iel. is a	e job ile, sy ppro /repr ibility Profi with	s ide ster app ving orts r or r le w and ed t	entif m se ear prir base not. I ill ali deve	led and curity on titing ed on if the so elop	
	Menu Item							
	Able to Log In?	Y	Y	Y	Y	۷	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 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	з	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 Job/Learning and Growth Report Options	5	4	3	2	1	N/A	
	4	5	4	3	2	1		
	Job Evaluation Questions Competencies	5	4	3	2	1	N/A	
	Competencies	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	

80

# Supervisory



🧿 _0	<b>bs</b> ∽ Employees ∽ Analysis ∽								0	💄 Amanda 🗸
Jobs	<b>*</b> • • • • • • • • • • • • • • • • • • •	💻 🚮 💿 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 7	Finance / Assessment	Administration		1	~	1	1	2022-12-23
0046FCOPY	Accounting Analyst - Business	17	Finance / Assessment	Administration		1	~		1	2022-09-26
0047	Accounts Payable Clerk	Job Description     7	Finance / Assessment	Administration		1	~	1	1	2022-12-23
0075	Administrative Assistant	EXEMPT	Administrative Support	Administration		1	1		1	2022-01-13
0075A	Administrative Assistant	EXEMPT	Administrative Support	Administration		1	1		1	2022-12-23
0077	Administrative Assistant, Council	EXEMPT	Administrative Support	Administration		1	1		1	2022-12-23

Actions: 🤒 🥖 💼	A 7 🕼	Review Dates:	From 2023-01-01	To 2023-12-31	📑 🕑 Vi	ew: Print Review-to-	date for Selected Review	<b>V (b)</b>		
Name	Id	Role	Туре	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			
Sorge, Nicole	000051	SUPERVISOR	Competency	2023-01-01	2023-12-31	2024-01-30	Not Started			

# **Non-Supervisory**

٢	Jobs 🗸	Employees 🗸	😮 💄 Bertha 🗸
	Jobs	Employees	CHANGE PASSWORD
		Business Plan	
		Personal Development Plan	
		Complete/Print Reviews	
		Archived Learning and Growth Reports	

			_								
Jobs											
9 💿	👷 🕫 📄 🗟 🖹 🗂 🔎 🍞 블	<ul> <li>Ad</li> </ul>	tive Job	s Only 🕜 All Jobs							
JobRef	Job Title	Reports 💫	,	Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs	7	Finance / Assessment	Administration		✓	1	1	~	2022-12-23
0046FCOPY	Accounting Analyst - Business		7	Finance / Assessment	Administration		~	1		~	2022-09-26
0047	Accounts Payable Clerk	<ul> <li>Job Description</li> </ul>	17	Finance / Assessment	Administration		√	1	1	~	2022-12-23
0075	Administrative Assistant	EXEMPT		Administrative Support	Administration		√	1		1	2022-01-13
0075A	Administrative Assistant	EXEMPT		Administrative Support	Administration		1	1		1	2022-12-23

Complete/Print Revie	1.00							0	🔒 Bertha 🗸
complete/11mt Revie	ews								
Actions: 🤒 🧪 前 🎲 🦷	Review Dates	From 2023-01-01	To 2023-12-3	1 📅 🕑	View: Print Review-to	-date for Selected Review	<b>v ()</b>		
Name	Id Role	Туре	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
Raynard, Bertha 0002	98 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.

Details for A5A - Jobs,	ministration ~ Learning and Growth, Analysis, CAS							
	· · · · · · · · · · · ·							
rofile Id	A5A							
rofile Name	A5A - Jobs, Learning and Growth	, Anal	ysis,	CAS				
Description	This Profile enables Users to rea for any job in the organization ex- flagged as 'CONFIDENTAL' With protocols will control the employ related screens for creating, con and archiving learning and grow whether the User has supervisor User has supervisory responsible enable them to view team learni training plans for subordinate pu- enables. Users to complete the C an effective tool for understand about organizational values.	cept t this f ee na pletin h revi y resp lities, ng an ersonr compe	hose Profi mes g, ag ews, onsi this d gro tel. T teno	e jobs le, sy that prov repo bility Profil wth a he Al y Alig	s ide sten app ing, rts b or n ie wi and 5A F gnm	ntifi ear c prin base ot. 1 ll als deve Profil ent s	ed and curity in ting d on f the so e also Survey,	
	NOTE: Please ensure the appropriate 'F Employee Id and Name in the 'Er	rofile' nploy	is a' ees'	tach modu	ed to ule.	o ea	ch	Ŧ
	Menu Item							
	Able to Log In?	Y	Y	Y	Y	Y	N	1
	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	
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	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	
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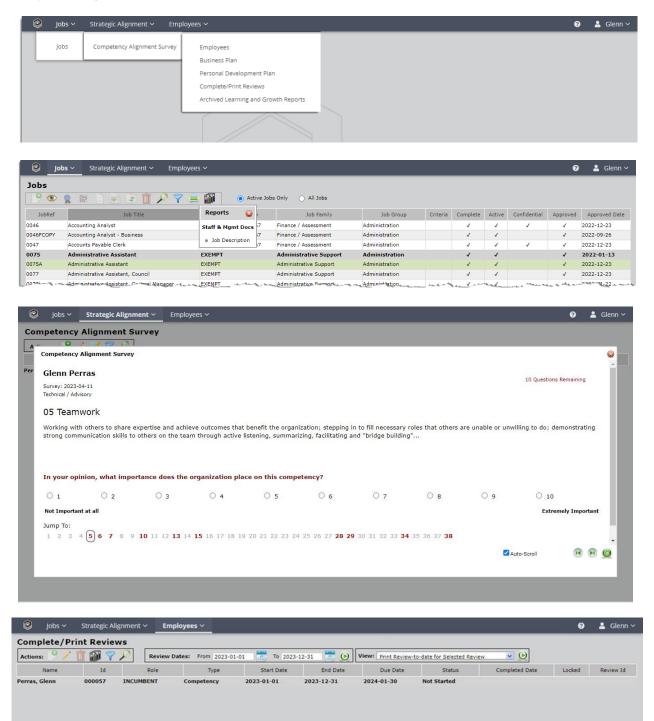
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# Supervisory

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Jobs											
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JobRef	Job Title	Reports 😡 🤉		Job Family	Job Group	Criteria	Complete	Active	Confidential	Approved	Approved Date
0046	Accounting Analyst	Staff & Mgmt Docs	7	Finance / Assessment	Administration		1	1	1	~	2022-12-23
046FCOPY	Accounting Analyst - Business		7	Finance / Assessment	Administration		✓	1		~	2022-09-26
0047	Accounts Payable Clerk	<ul> <li>Job Description</li> </ul>	7	Finance / Assessment	Administration		✓	1	1	1	2022-12-23
0075	Administrative Assistant	EXEMPT		Administrative Support	Administration		1	1		1	2022-01-13
0075A	Administrative Assistant	EXEMPT		Administrative Support	Administration		<	1		✓	2022-12-23
0077	Administrative Assistant, Council	EXEMPT		Administrative Support	Administration		✓	1		1	2022-12-23
0078	Administrative Assistant, General Manager	EXEMPT		Administrative Support	Administration		✓	1		~	2022-11-22
0075B	Administrative Assistant, Help Desk	EXEMPT		Administrative Support	Administration		✓	1		~	2022-04-10
000020	Administrative Coordinator	EXEMPT		Administrative Support	Administration		1	1			2022-12-23

#### **Non-Supervisory**



# 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.

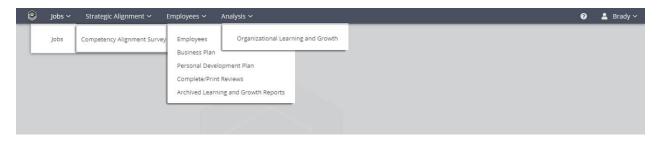
With **lead** responsibilities, Users with this Profile will also be able to view organizational learning and growth and develop training plans for subordinate personnel.

#### NOTE:

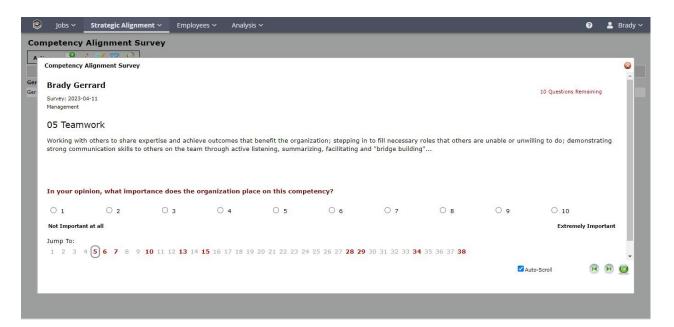
Please ensure the appropriate 'Profile' is attached to each Employee Id and Name in the 'Employees' module.

Profile Details for A6 - Jobs and	Employees: Comprehensive								×
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	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	Þ.	
	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	NA		
	Print Learning and Growth Reports	5	4	3	2	1	N/A		
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	Organization Structure	5	4	3	2	1	N/A		
	Job/Learning and Growth Neport Options	5	4	3	2	1	N/A 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 N/A		
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	Job Level	5	4	3	2	1	N/A		
	Data Integration & Import	5	4	3	2	1	N/A		
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### Supervisory



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0046	Accounting Analyst	Staff & Mgmt Docs	67	Finance / Assessment	Administration		1	1	1	1	2022-12-23
0046FCOPY	Accounting Analyst - Business	a tab Description	7	Finance / Assessment	Administration		✓	1		√	2022-09-26
0047	Accounts Payable Clerk	Job Description	,	Finance / Assessment	Administration		1	1	1	1	2022-12-23
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Name	Id	Role	Туре	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**



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0046	Accounting Analyst	Staff & Mgmt Docs 6	57	Finance / Assessment	Administration		1	1	1	1	2022-12-23
0046FCOPY	Accounting Analyst - Business	1 7		Finance / Assessment	Administration		1	1		1	2022-09-26
0047	Accounts Payable Clerk	<ul> <li>Job Description</li> </ul>		Finance / Assessment	Administration		1	1	1	1	2022-12-23
0075	Administrative Assistant	EXEMPT		Administrative Support	Administration		1	1		1	2022-01-13
0075A	Administrative Assistant	EXEMPT		Administrative Support	Administration		1	1		1	2022-12-23

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Name	Id	Role	Туре	Start Date	End Date	Due Date	Status	Completed Date	Locked	Review Id
linsky, 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.

0	Jobs 🗸	Strategic Alignment 🗸	Employees 🗸	Analysis 🗸	Administration $\sim$	≢	8	💄 admin1 🗸
	Jobs User Assigned Jobs Job Settings	Competency Alignment Survey Competency Alignment Survey Results Strategic Alignment Settings	Employees Business Plan Personal Development Plan Complete/Print Reviews	Organizational Learning and Growth Succession Planning Analysis Settings	Constraints Profiles Users Organization Structure			
			Reviewer Notifications Archived Learning and Growth Reports		System Settings			
			Employee Settings					

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



# **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.

