

# Manage Competencies

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## Manage Competencies - introduction

Competency can be defined as the ability of an individual to do his/her job properly. Every organisation has its own collections of defined competencies that are important for the performance of the different kinds of work that the organisation does. On a national or international level, a set of recognised competencies is called a qualification.

Competencies can be either

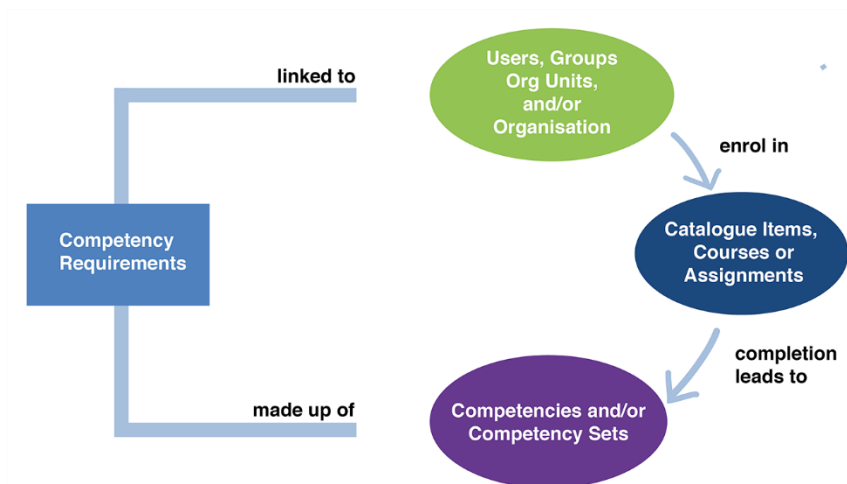
- Nationally recognised competencies, as per TGA at <http://training.gov.au/Home/Tga>
- In house competencies which relate only to an organisation

In the CLS, Competencies can be linked to Catalogue Items containing Learning Assets such as courses or training events. Competencies can also be linked directly to Courses and Assignments. A User acquires Competencies through enrolment in and completion of these learning assets.

Competencies can be defined as permanent or as only lasting for defined periods of time. They can also be collected into functional units called Competency Sets.

Competency Requirements are collections of Competencies that are setup so that Users are *required* to acquire these competencies. Managers can run various reports to determine compliance with specified Competency Requirements amongst staff.

The relationships between these different components can be visualised:



Note that in a MOOC environment, Endorsements work alongside Competencies and give *learners* the opportunity to recognise the skills of their peers. See [Endorsements and Badges](#)

## Manage Competencies

To access Competencies select **Manage Learning > Manage Competencies**.

## Manage Learning

- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage CPD
- Manage CPD progress
- Manage Competencies**
- Endorsement Queue
- Assign Learning
- Add Learning

## Manage Competencies

Search for Competencies and Sets

Active (0)

Inactive (0)

Currently there are no records found.

- Home
- Manage People
- Manage Learning**
- Design
- Settings
- My Account
- My Calendar
- Logout

In the example above, no Competencies had been set up previously.

If Competencies *had* been added previously, they are displayed on this screen, as is shown in the example below. Note that they are divided into Active and Inactive Competencies.

## Manage Competencies

Actions

Search for Competencies and Sets

Active (2)

Inactive (0)

| <input type="checkbox"/> | Code                                     | Description ▲  | Validity | Last Modified |
|--------------------------|--|--|----------|---------------|
| <input type="checkbox"/> | performance-management-and-effectiveness | <b>performance-management-and-effectiveness</b><br>Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0) | Forever  | Today         |
| <input type="checkbox"/> | vision-and-common-purpose                | <b>Vision and common purpose</b><br>Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)                | Forever  | 09 Dec 2014   |

1

20 items per page

1 - 2 of 2 items



Delete

Archive

These Competencies can be deleted, archived and edited; see [Archive, Delete or Edit a Competency](#) for details.

## Add a Competency

Select **Manage Learning** > **Manage Competencies**

Select **Add Competency** from the Actions drop-down menu.

**Manage Competencies**

Search for Competency

Active (0) Inactive (0)

Currently there are no records found.

Actions

- Add Competency
- Add Competency Set
- Manage Competency Set Types
- Manage Competency Requirements
- Manage Compliance with Competency Requirements
- Import Competencies
- Import Competency User Status

1. Add a **Name**; the **Identifier** will be entered automatically. Enter a **Description** if desired.
2. Set the **Validity Period** by first selecting an option from the right hand drop-down box. You can choose **Forever** or one of **Days**, **Months** or **Years**, in which case you will also enter a number in the left hand box. For more information about Validity, see **Extra Note** below.
3. Check the **Active** box if applicable
4. Check the **Nationally Recognised** box only if applicable. You can select an image that represents the **Competency Icon** or use the default icon. This is usually referred to as a **Badge**. Users will see this Badge if Endorsements is set up (see [Badges and Endorsements](#) for details.)
5. Click **Save Competency**
6. If Endorsements had been previously enabled in **Settings**, you will see an extra area, **Endorsement Setting**, where you can setup Endorsements for this competency. See [Badges and Endorsements](#) for details.

Name\*

Identifier\*

Description

Edit Insert View Format Table

Format Bold Italic Bulleted List Numbered List Link Unlink

Words: 0

Validity Period

Forever

Active ☒

Nationally Recognised? ☐

Endorsement Settings

Enable Endorsement ☐

Competency Icon

Select files...

Save Competency or Cancel

1

2

3

4

5

6

### Extra Note about Validity

If a Competency is defined as being valid for a certain period of time, a User holding this Competency will lose the Competency after the validity period is over. This period of time is measured from the date the User completes the linked learning asset and acquires the Competency.

## Archive, Delete or Edit a Competency

You can delete or archive Competencies. To perform these operations select **Manage Learning > Manage Competencies**. You will see a list of the exiting Competencies and Competency Sets.

The screenshot displays the JanisonCLS 'Manage Competencies' page. The sidebar on the left has 'Manage Learning' selected, with 'Manage Competencies' highlighted. The main area shows a search bar (1), a list of competencies with checkboxes (2), and 'Delete' and 'Archive' buttons (3). The competencies listed are 'entertainer', 'performance-management-and-effectiveness', and 'vision-and-common-purpose'. The right sidebar shows navigation links like Home, Manage People, Design, Manage Learning, and Settings.

1. You can search for a particular Competency or Competency Set by clicking the Search button

To Delete or Archive a Competency or Competency Set:

2. Click the check box to the left of it
3. Click **Delete** or **Archive** as required

To Delete or Archive all Competencies and Competency Sets, click the check box marked **Code**, then Click **Delete** or **Archive** as required

Note that

- Archiving takes the Competency out of activity but it does not delete it.
- You cannot Archive or Delete a Competency that is in use (for example, linked to Learning Assets or Competency Sets).

### Edit a Competency

Click the name of the Competency you want to edit. Once the Competency is displayed, click **Edit Competency**:

Manage Learning

Payment Transactions
Manage Catalogue
Manage Sessions
Enrolments
**Manage Competencies**
Endorsement Queue
Manage CPD
Manage CPD progress
Assign Learning
Add Learning
Manage Learning Assets
Approve Learning
Assessment Events

## Competency: Entertainer

Edit Competency

Present in **Sets (0)**, **Catalogue Items (1)**, **Learning Assets (0)**

|                        |                                     |
|------------------------|-------------------------------------|
| Name                   | Entertainer                         |
| Identifier             | entertainer                         |
| Validity Period        | 2                                   |
| Validity Period Type   | Months                              |
| Active                 | <input checked="" type="checkbox"/> |
| Nationally Recognised? | <input type="checkbox"/>            |
| Icon                   |                                     |

Editing a Competency allows you to change any of the values that were entered when the Competency was created. See [Add a Competency](#) for details.

Note that

- If you change the name and/or identifier of the Competency all of its existing relationships (such as membership of a Competency Set, link to a Catalogue Item, etc) will be retained.
- if you update a Competency after a User has acquired it the changes will affect that User's Competency


## Link Competency to a Catalogue Item

A User acquires a Competency when they complete the Catalogue Item that has the linked Competency.

To link Competency to a Catalogue Item navigate from **Manage Learning > Manage Catalogue**

janison

Search


Administrator

Manage Learning

Payment Transactions
**Manage Catalogue**
Manage Sessions
Enrolments
Manage Competencies
Endorsement Queue
Manage CPD
Manage CPD progress
Assign Learning
Add Learning

## Catalogue Manager

Search for Catalogue Items

Available in Catalogue (23)
Not in Catalogue (0)
Draft (14)
Archived (1)

| Type                     | Catalogue Name | Number Of |
|--------------------------|----------------|-----------|
| <input type="checkbox"/> | Amazing Facts  | 3         |

Home
Manage People
Design
**Manage Learning**
Settings

My Account
Notifications
My Calendar
Logout

Select **Edit Catalogue Item** using the **Actions** drop-down menu

Manage Learning

Payment Transactions

Manage Catalogue

Manage Sessions

Enrolments

Manage Competencies

Endorsement Queue

Manage CPD

Manage CPD progress

Assign Learning

Add Learning

Manage Learning Assets

Approve Learning

Catalogue Item: Astronomy

Actions

✓ Tasks

📄 Notes

📎 Attachments

🔗 Enrolled Users (1): Not Attempted (0), Incomplete (1), Completed (0).

|                  |   |
|------------------|---|
| Name             | Astronomy   |
| Identifier       | astronomy   |
| Instalaunch link | <a href="http://help.cls.janison.com/q/astronomy">http://help.cls.janison.com/q/astronomy</a> ? |
| Status           | <div>● Available in Catalogue</div> <div>Change</div>   |

Edit Course

Edit Catalogue Item

Edit in Wizard

Assign Learning

Click **Competencies**



Manage Learning

Payment Transactions

Manage Catalogue

Manage Sessions

Enrolments

Manage Competencies

Endorsement Queue

Manage CPD

Manage CPD progress

Assign Learning

Add Learning

Manage Learning Assets

Approve Learning

Assessment Events

Assignment Submission

Marking

Marking Projects

Report APIs

Reports

Customisable Reports

Manage Tags

Token Orders

Recently Viewed

Edit Catalogue Item:Astronomy

Delete Catalogue Item

Name\*

Astronomy

Identifier\*

astronomy

Provider

(Not specified)

Author

Approx Duration (minutes)

Overview

Learning Objectives

Edit

Insert

View

Format

Table

Font Family

Font Sizes

Formats

B

I

Words: 0

Price

Points

Due Date

(None)

Has Certificate

Components

Select Learning Asset

| Component               | Prerequisite  | Weight | Share progress                      | Actions                   |
|-------------------------|---------------|--------|-------------------------------------|---------------------------|
| Course Building Courses | set full stop | 100    | <input checked="" type="checkbox"/> | <div>+</div> <div>-</div> |

Thumbnails

Competencies

Self Enrolment Settings

Price

Points

Due Date

(None)

Has Certificate

Components

Select Learning Asset

| Component               | Prerequisite  | Weight | Share progress                      | Actions                   |
|-------------------------|---------------|--------|-------------------------------------|---------------------------|
| Course Building Courses | set full stop | 100    | <input checked="" type="checkbox"/> | <div>+</div> <div>-</div> |

Thumbnails

Competencies

Self Enrolment Settings

Additional Enrolment Settings

Save Catalogue Item

or

Cancel

- Click on the box to the left of the + button to list all the Competencies and Competency Sets that can be selected. Note that there is no indication whether a list item is a Competency or Competency Set.
- To link a Competency or Competency Set, click its name to load it into the box and then click the + button at the right.

## ▼ Competencies

You can add Competencies or Competency sets to this Catalogue Item. Learners will automatically obtain these Competencies after completing this Catalogue Item.

### From Learning Assets linked to this Catalogue Item

No Records To Display

### Competencies for this Catalogue Item

Specify Competencies and Competency sets achieved through completion of this Catalogue Item. They will automatically be awarded to any learner after completion of the Catalogue Item.

| Code | Name | Active | Validity | Actions |
|------|------|--------|----------|---------|
|------|------|--------|----------|---------|

[entertainer] Entertainer



- Save the Catalogue Item

Note that if you link a Competency that needs to be renewed periodically, then the Catalogue Item must allow re-enrolments so that Users can re-enrol in the Catalogue Item and re-acquire the Competency.

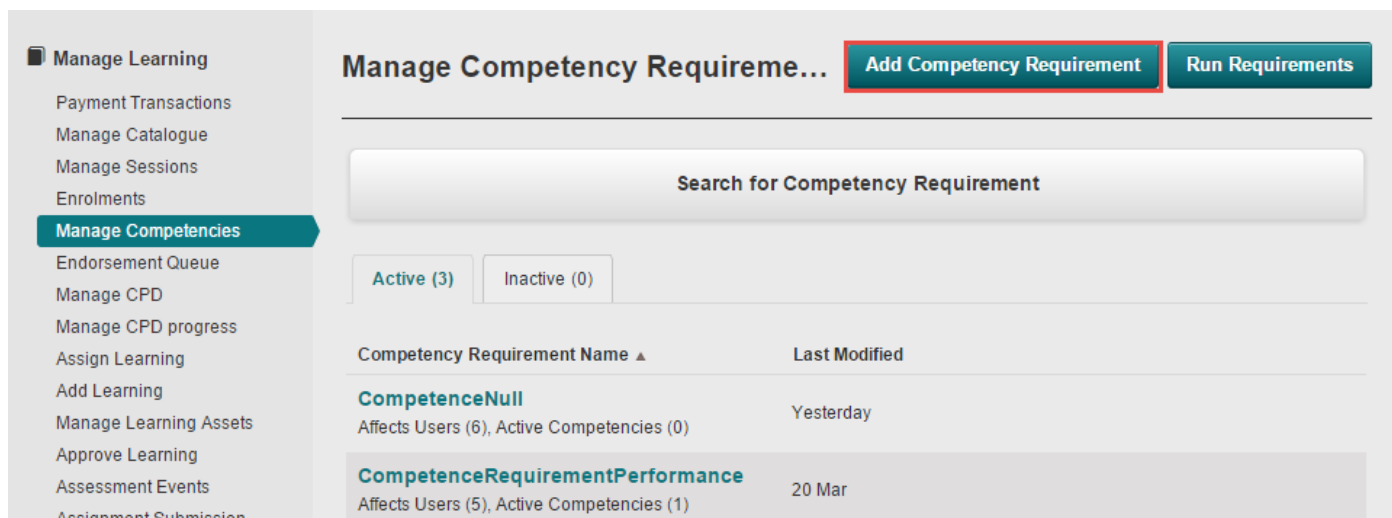
## Add a Competency Requirement

To setup and manage Competency Requirements select **Manage Learning > Manage Competencies**

Select **Manage Competency Requirements** from the **Actions** drop-down menu.

The screenshot shows the 'Manage Competencies' page. On the left is a sidebar with 'Manage Learning' expanded, showing options like 'Payment Transactions', 'Manage Catalogue', 'Manage Sessions', 'Enrolments', 'Manage Competencies' (highlighted), 'Endorsement Queue', 'Manage CPD', 'Manage CPD progress', 'Assign Learning', 'Add Learning', 'Manage Learning Assets', 'Approve Learning', and 'Assessment Events'. The main area is titled 'Manage Competencies' and has an 'Actions' dropdown menu open. The dropdown menu contains the following options: 'Add Competency', 'Add Competency Set', 'Manage Competency Set Types', 'Manage Competency Requirements' (highlighted with a red box), 'Manage Compliance with Competency Requirements', 'Import Competencies', and 'Import Competency User Status'. Below the dropdown, there are filters for 'Active (2)' and 'Inactive (0)'. A table lists competencies with columns for 'Code', 'Description', and 'Validity'. The first row shows a checkbox, the code 'performance-management-and-effectiveness', the description 'Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)', and the validity 'Forever Just Now'.

Select **Add Competency Requirement** from the options at the top of the page:



**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events
- Assignment Submission

## Manage Competency Requireme...

[Add Competency Requirement](#) [Run Requirements](#)

Search for Competency Requirement

Active (3) Inactive (0)

| Competency Requirement Name ▲   | Last Modified |
|---|---------------|
| <b>CompetenceNull</b><br>Affects Users (6), Active Competencies (0)                   | Yesterday     |
| <b>CompetenceRequirementPerformance</b><br>Affects Users (5), Active Competencies (1) | 20 Mar        |

To add a Competency Requirement

1. Enter a name for the Competency Requirement. The identifier will be created automatically.
2. Enter a short description if desired
3. Check the **Active** box
4. Click in the **Primary Contact** box and select a User
5. Click **What competencies are required** and then click the box to the left of the + button  
Add a Competency by clicking it to load it into the box and then clicking the + button at the right.
6. Under **Which users does this rule apply to?** Specify the Users that this Competency Requirement applies to.  
See extra notes below for details.
7. Click **Save**

Note that this Competency Requirement is not actually applied to the specified Users until you Run Requirements for that Competency Requirement (see [Run Requirements](#)).

**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events
- Assignment Submission
- Marking
- Marking Projects
- Report APIs
- Reports
- Customisable Reports
- Manage Tags
- Token Orders

**New Competency Requirement**

Name\* 1

Identifier\* 2

Description 3

Active 4 ☒

Primary Contact 5

▼ What competencies are required

Specify the Competencies that are required

| Code                                       | Name | Active | Validity | Actions |
|--|------|--------|----------|---------|
| Select Competency 6 <input type="text"/> + |      |        |          |         |

Which users does this rule apply to? 6

AND

| Field     | Operator | Value                |
|-----------|----------|----------------------|
| Full Name | =        | <input type="text"/> |

or

Extra notes about specifying Users (point 6 above):

Rather than simply picking out User names from a drop-down list, you set up rules to define a combination of Users for whom this Competency Requirement applies to. These rules are called Items here. They can be quite targeted and are combined using Boolean logic. This will be best understood by someone who is comfortable with

- Boolean operations (AND, OR, NOT),
- its language (e.g. “!” means “NOT”), and
- how nesting these rules limits their scope

At the simplest level you follow this process:

- Click **Add Item** to set up a rule
- Choose a **Field** (for example, Full Name, Active, etc) from the drop-down box at the left
- Choose an **Operator** from the drop-down box in the middle
- Type a value in the box at the right.
  - In some cases, for example when you have specified that “Active =”, you will be provided with drop-down choices, in this case “yes” or “no”.  
In other cases, for example in the second image below (4.), when you have specified that “Org Unit =”, an additional drop-down box will appear with Const and Param as choices. You select “Const” to indicate that you are specifying a value in the right hand box; you select “Param” to indicate that you are specifying a characteristic in the right hand box. In this example, choosing Const means that the box displays actual Org Units to select. Selecting Param means that you can choose a relationship, i.e. your own Org Unit.
- You can add another rule (Item) to this top-level rule Group by clicking the top **Add Item** button (A) again. Notice that this new rule (Active = Yes) lines up with the first rule. Depending on what is selected in the drop-down field at the top (E), you are now specifying Users for whom both of these rules are true (AND) or

else Users for whom either of the rules is true (OR). For example, in the image below the rule specifies Users with the role of “Event Facilitator” who are also active Users (AND).

- F. You delete a single rule (Item) by clicking the **minus** icon at its right hand side.
- G. You can delete all the rules by clicking **Delete All Items**
- H. You can further combine rules into sub Groups (and this *does* require a technically-oriented person) by clicking **Add Group** (H). This makes it possible to logically build a complex set of filters (but this does require a technically-oriented person).
- I. After you have clicked **Add Group** (H), new fields and buttons will then appear. You then click the local **Add Item** button (I) to start creating a new rule Group made of logical combinations of rules. In the example below the rules will be logically combined using AND (L), that is, they must all be true for the whole Group of rules to be considered true
- J. The logical outcome of this rule Group will be logically combined with the other rules listed just above it at (J), i.e those rules at the same level.

This functionality, which can be repeated and combined numerous times and ways, means that rules can be nested in rules that are nested and combined in rules, and so on, leading to highly detailed specifications. As discussed, these are best set up by people, such as programmers, who can design the nested IF statements required.

- K. You delete a Group of rules by clicking **Delete Group**

The screenshot shows a web-based rule configuration interface titled "Which users does this rule apply to?". It features two main sections for defining rules, each with a logical connector (AND/OR), buttons for adding items or groups, and a delete all items option. The first rule section is configured with "AND", "Role" set to "Event Facilitator", and "Active" set to "Yes". The second rule section is configured with "AND" and "Full Name" set to an empty field. Annotations A through K point to various UI elements: A points to "Add Item", B to the "Role" dropdown, C to the "=" operator, D to the "Event Facilitator" value, E to the "AND" connector, F to the minus icon, G to "Delete All Items", H to "Add Group", I to the "Add Item" button in the second section, J to the "Active" dropdown, K to "Delete Group", L to the "AND" connector in the second section, and the minus icon for the second rule.

To give an example of a targeted set of rules, the image below specifies the selection of all Users who:

1. have the role of Chief Marker, OR
2. are in the Org Unit named “Organisation Unit 1”, OR
3. have the first name “Ryan” AND the last name of “Jones”

Which users does this rule apply to?

**A**

OR Add Item Add Group Delete All Items

| Field             | Operator | Value                              |
|-------------------|----------|------------------------------------|
| Role <b>1</b>     | =        | Chief Marker                       |
| Org Unit <b>2</b> | =        | Co... <b>4</b> Organisation Unit 1 |

AND Add Item Add Group Delete All Items Delete Group

| Field               | Operator | Value |
|---------------------|----------|-------|
| First Name <b>3</b> | =        | Ryan  |
| Last Name           | =        | Jones |

Note that if the top level field (marked **A**) was set to “AND” instead of “OR”, then the only User(s) selected would be people named “Ryan Jones” in Organisation Unit 1 with the role of Chief Marker.

After you have saved the Competency Requirement you will see this screen:

janison

Search

Administrator

**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD

**Manage Competency Requireme...** Add Competency Requirement Run Requirements

Search for Competency Requirement

Active (3) Inactive (0)

You need to click **Run Requirements** to actually link the Competency Requirement to the specified Users.

## Run Requirements

A Competency Requirement is not actually linked to the Users that are specified until you Run Requirements.

To link all active Competency Requirements select **Manage Learning > Manage Competencies**

Select **Manage Competency Requirements** from the **Actions** drop-down menu

## Manage Learning

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments

## Manage Competencies

- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events
- Assignment Submission
- Marking
- Marking Projects

## Manage Competencies

Actions

Search for Competency

Active (3)

Inactive (0)

☐ Code

Description

☐ entertainer

## Entertainer

Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)

2 Months Yesterday

☐ performance-management-and-effectiveness

## performance-management-and-effectiveness

Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)

Forever 20 Mar

- Add Competency
- Add Competency Set
- Manage Competency Set Types
- Manage Competency Requirements
- Manage Compliance with Competency Requirements
- Import Competencies
- Import Competency User Status

A list of Competency Requirements will be displayed. You do not have to select any of them.

Select **Run Requirements**. After you have Run Requirements for a Competency Requirement that you had just created, you will notice that the number next to **Affects Users** has changed because Users have just been linked to the Requirement.

## Manage Learning

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments

## Manage Competencies

- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning

## Manage Competency Requirement...

Add Competency Requirement

Run Requirements

Search for Competency Requirement

Active (3)

Inactive (0)

Competency Requirement Name

Last Modified

## CompetenceNull

Affects Users (6) Active Competencies (0)

Yesterday

## Edit a Competency Requirement

To edit a Competency Requirement select **Manage Learning > Manage Competencies**

Select **Manage Competency Requirements** from the **Actions** drop-down menu.

**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events

## Manage Competencies

Search for Competency

Active (2) Inactive (0)

| <input type="checkbox"/> Code                                     | Description ▲                            |   |                  |
|---|--|---|------------------|
| <input type="checkbox"/> performance-management-and-effectiveness | performance-management-and-effectiveness | Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0) | Forever Just Now |

Actions

- Add Competency
- Add Competency Set
- Manage Competency Set Types
- Manage Competency Requirements**
- Manage Compliance with Competency Requirements
- Import Competencies
- Import Competency User Status

A list of Competency Requirements will be displayed. Click the name of the one you want to edit and select **Edit a Competency Requirement**.

**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events
- Assignment Submission
- Marking
- Marking Projects
- Report APIs
- Reports

## Competency Requirement: CompetenceRequirementPerformance

**Edit Competency Requirement** Run Requirement

Name CompetenceRequirementPerformance

Identifier CompetenceRequirementPerformance

Active Yes

> What competencies are required

Which users does this rule apply to?

| Field | Operator | Value      |
|-------|----------|------------|
| Role  | =        | Basic User |

> Recent activities

Editing a Competency Requirement allows you to change any of the values that were entered when the Competency Requirement was created. See [Add a Competency Requirement](#) for details.

### Notes

- you can change the name and/or identifier of the Competency Requirement and all of its existing relationships (such as a link to a Catalogue Item) will be retained.
- The edited Competency Requirement is not actually applied to the relevant Users until you Run Requirements for that Competency Requirement. See [Run Requirements](#)

## Delete a Competency Requirement

Follow the steps for editing a Competency Requirement. See [Edit a Competency Requirement](#)

Click **Delete Competency Requirement**



**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events
- Assignment Submission
- Marking
- Marking Projects

## Edit Competency Requirement:CompetenceNull

[Delete Competency Requirement](#)

Name\* CompetenceNull

Identifier\* competenceNull

Description

Active ☒

Primary Contact Administrator

> What competencies are required

## Manage Compliance with Competency Requirements

This allows you to see a broad view of the state of Users' compliance with the active Competency Requirements. The information is displayed as diagrams, lists and numbers. It can be subdivided into data about Users and data about Competencies.

Select **Manage Learning > Manage Competencies**

Select **Manage Compliance with Competency Requirements** from the **Actions** drop-down menu.

**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events

## Manage Competencies

[Actions](#)

Search for Competency

Active (2) Inactive (0)

☐ Code Description ▲

☐ performance-management-and-effectiveness

performance-management-and-effectiveness  
Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)

Forever Just Now

- Add Competency
- Add Competency Set
- Manage Competency Set Types
- Manage Competency Requirements
- Manage Compliance with Competency Requirements**
- Import Competencies
- Import Competency User Status

The resulting display shows the situation for all Users and all Competencies

- 1 The search bar allows you to narrow down the display to data about User(s), Organisations, Organisation Units or Groups
- 2 The description tells you what is included in this display: the number of Users and Competency Requirements and a summary of the numbers of Compliant, Low Risk, High Risk and Non-Compliant User Competency Requirements
- 3 This data is visualised as a pie chart showing Competency Requirements Compliance
- 4 Data is also mapped in a Timeline. Moving the cursor over this Timeline shows a popup display of data. The data refers to Continued Professional Development (CPD). See Manage CPD for details.
- 5 To focus on data about Users click **Details (by User)**.
- 6 Click **View More** to see an itemized display of the data relating to that User. For example, Di Learner is compliant with half of her requirements. Clicking View More shows this data and lists the Competencies involved
- 7 To focus on data about Users click **Details (by Competency)**

## Manage Learning

Payment Transactions  
Manage Catalogue  
Manage Sessions  
Enrolments

### Manage Competencies

Endorsement Queue  
Manage CPD  
Manage CPD progress  
Assign Learning  
Add Learning  
Manage Learning Assets  
Approve Learning  
Assessment Events  
Assignment Submission  
Marking  
Marking Projects  
Report APIs  
Reports  
Customisable Reports  
Manage Tags  
Token Orders

Recently Viewed

## Manage Compliance with Competency Requirements

Actions

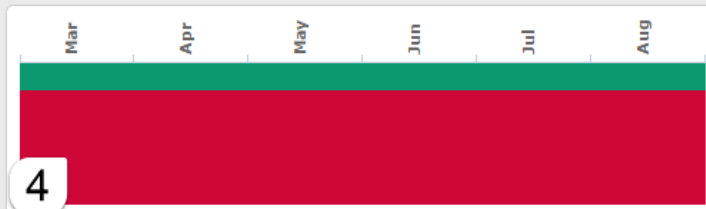
1 Search for Names, Email, Username, Organisation Units, Organisations or Groups

2

Users (5) across Competency Requirements (2), resulting in User Competency Requirements (10): Compliant (2), Low Risk (0), High Risk (0), Non Compliant (8)



Competency Requirements Compliance



Overall Timeline

### Details (by User)

5







All (5)

Compliant (0)

Low Risk (0)

High Risk (0)

Non Compliant (5)

|   | Name            | Compliance  | Timeline    | Next Expiry | Actions                   |
|---|-----------------|---|-------------|-------------|---------------------------|
|    | Ann Black       |    | M A M J J A |             | <a href="#">View More</a> |
|   | demo User       |   | M A M J J A |             | <a href="#">View More</a> |
|  | Di Learner      |  | M A M J J A |             | <a href="#">View More</a> |
|  | Jo Marker       |  | M A M J J A |             | <a href="#">View More</a> |
|  | Samantha Cradle |  | M A M J J A |             | <a href="#">View More</a> |


6

20 items per page

1 - 5 of 5 items

7

### Details (by Competency)

| Code   | Name                                     | Compliance  |
|--|--|---|
|  performance-management-and-effectiveness | performance-management-and-effectiveness |  |
|  entertainer                              | Entertainer                              |  |

1

1 - 2 of 2 items

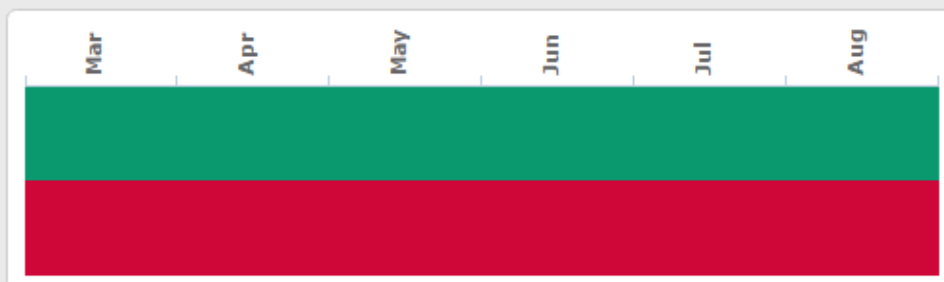
## Competency Requirement Compliance

For Di Learner

2 Competency Requirements: Compliant (1), Low Risk (0), High Risk (0), Non Compliant (1)



Competency Requirements Compliance



Overall Timeline

### Details

| Code/Name   | Date Completed | Expiry Date | Status |
|---|----------------|-------------|--------|
| performance-management-and-effectiveness performance-management-and-effectiveness | 10 Dec 2014    | Never       |        |
| entertainer Entertainer   |                |             |        |

Risk relates to Users who are nearing the expiry of a Competency. Low Risk Users are those who have made substantial progress in acquiring it; High Risk Users have not done so.

If you need a report on a Competency Requirement (rather than on Competencies), go to **Manage Learning > Customisable Reports** and setup a custom report.

## Add a Competency Set

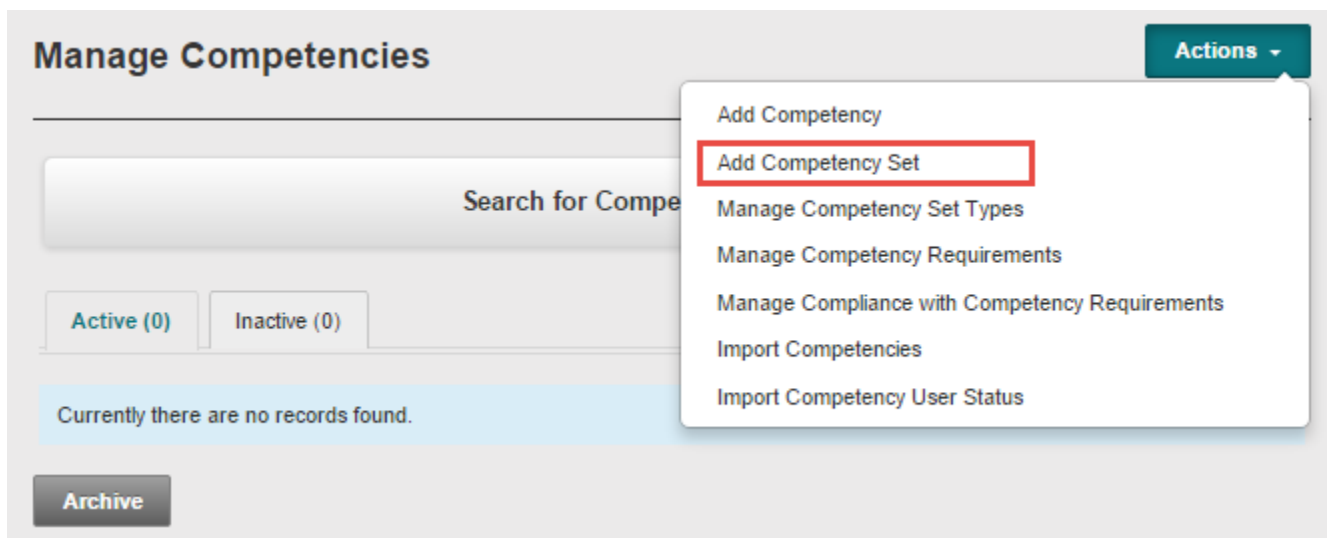
Sometimes you need to create a set of competencies, such as an in-house collection of competencies. These are called Competency Sets.

### Notes

- A Competency must have already been created before it can be added to a Competency Set. Refer to [Add a Competency](#) for instructions on how to create Competencies.
- Competency Sets have a defined Set Type. You can choose from the default Set Type and any other Set Types that have been created in advance. See [Manage a Competency Set Type](#) for instructions.

To add a Competency Set, select **Manage Learning > Manage Competencies**

Select **Add Competency Set** from the **Actions** drop-down menu.



## Manage Competencies

Actions ▾

Search for Competencies

Active (0) Inactive (0)

Currently there are no records found.

Archive

- Add Competency
- Add Competency Set
- Manage Competency Set Types
- Manage Competency Requirements
- Manage Compliance with Competency Requirements
- Import Competencies
- Import Competency User Status

1. Select a **Competency Set Type** from the available options. Add a **Name**; the **Identifier** will be entered automatically. Enter a **Description** if desired.
2. Check **Active** box.
3. Check **Nationally Recognised** box if applicable.
4. Click on **Competencies** and search for the required competencies to add to your set:  
Click the box to the left of the + button to see all the competencies that can be selected. To add a Competency, click to load it into the box and then click the + button at the right.
5. Click **Save Competency**

Competency Set Type: Qualification

Name\*:

Identifier\*:

Description:

Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

↶ ↷ Formats ▾ **B** *I* [List Icons] [Link Icon] [Code Icon]

Words: 0

Active: ☒ 2

Nationally Recognised?: ☐ 3

▼ Competencies

| Code  | Name | Active | Validity | Actions |
|---|------|--------|----------|---------|
| <div> Select Competency or Competency Set <input type="button" value="+"/> </div> |      |        |          |         |

5  or [Cancel](#)

## Manage Competency Set Types

You may require more than the default Competency Set Type. If so, you can add new Set Types.

Select **Manage Learning > Manage Competencies**

Click **Manage Competency Set Types** from the **Actions** drop-down menu.

JanisonCLS

Search

Administrator

Manage Learning

- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Report APIs
- Reports
- Customisable Reports
- Manage Tags

## Manage Competencies

Search for Competency

Active (0) Inactive (0)

| Code                   | Description |
|------------------------|-------------|
| No records to display. |             |

20

Delete Archive

Displaying items 0 - 0 of 0

Actions

- Add Competency
- Add Competency Set
- Manage Competency Set Types**
- Manage Competency Requirements
- Manage Compliance with Competency Requirements
- Import Competencies
- Import Competency User Status

JanisonCLS

About - Privacy - Terms & Conditions - Help

Click **Add Competency Set Type** and add a Name and a Description for this Competency Set Type

JanisonCLS

Search

Administrator

Manage Learning

- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Report APIs
- Reports
- Customisable Reports
- Manage Tags

## Manage Competency Set Types

Search for Competency Unit Set Type

| Competency Set Type Name |
|--------------------------|
| Qualification            |

20

Delete

Displaying items 1 - 1 of 1

**Add Competency Set Type**

JanisonCLS

About - Privacy - Terms & Conditions - Help

- Click **Save Competency Set Type**.

Manage Learning

Payment Transactions

Manage Catalogue

Manage Sessions

Enrolments

Manage Competencies

Endorsement Queue

Manage CPD

Manage CPD progress

Assign Learning

Add Learning

Manage Learning Assets

Approve Learning

Assessment Events

Assignment Submission

Marking

Marking Projects

Report APIs

## New Competency Set Type

Name\*

Description

Edit

Insert

View

Format

Table

Font Family

Font Sizes

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Formats

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**A**

Words: 0

Save Competency Set Type

or [Cancel](#)

The learner selects **My Account**

1. When they click on **Competency**, a window opens
2. Three tabs appear: Required, Enrolled and Achieved. **Required** lists the Competency(s) that are required for the learner. If a Competency has been acquired the Date Completed and Expiry Dates are listed and the Status icon changes to a tick. If it has not been completed, these dates are blank and the Status icon is red with a crossbar
3. If the learner clicks **Enrolled**, they see a list with Competencies, linked Catalogue Items, completion dates and Status icons
4. If the learner clicks **Achieved**, they see a list with a Competency, Completion and Expiry Dates and a Status icon.

## User: demo User [demoUser]

In Organisation 1

Actions ▾

Organisation

Organisation 1

Org Unit

Organisation Unit 1

Username

demoUser



### > System

Reports To

1

None

### ▼ Competency

2

Required

Enrolled

Achieved

Code/Name

Date Completed

Expiry Date

Status



entertainer Entertainer

27 Mar 2015

Never



### > User roles

### ▼ Competency

3

Required

Enrolled

Achieved

Code/Name

Enrolment

Date Completed

Status



entertainer Entertainer

Amazing Facts

27 Mar 2015



### ▼ Competency

4

Required

Enrolled

Achieved

Code/Name

Date Completed

Expiry Date

Status



entertainer Entertainer

27 Mar 2015

Never



## Import Competencies

Rather than entering Competencies into the CLS system one at a time using **Add a Competency**, you can import a batch of Competencies using a spreadsheet.

Select **Manage Learning > Manage Competencies**

Click **Import Competencies** from the **Actions** drop-down menu.



**Manage Learning**

- Payment Transactions
- Manage Catalogue
- Manage Sessions
- Enrolments
- Manage Competencies**
- Endorsement Queue
- Manage CPD
- Manage CPD progress
- Assign Learning
- Add Learning
- Manage Learning Assets
- Approve Learning
- Assessment Events

## Manage Competencies

Search for Competency

Active (2) Inactive (0)

☐ Code Description ▲

☐ performance-management-and-effectiveness  
Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)

Forever Just Now

**Actions**

- Add Competency
- Add Competency Set
- Manage Competency Set Types
- Manage Competency Requirements
- Manage Compliance with Competency Requirements
- Import Competencies**
- Import Competency User Status

1. Download the default spreadsheet template, populate it with your data and save it on your local storage. Alternatively, set your own spreadsheet out with the same columns as the template.
2. The default template has a column labelled "Linked Set Id". If you tick the **Add competency set requirement** check box, a new Competency Set will be created for any values in that column in your spreadsheet that are not found in the CLS system.
3. Select an email address where the import summary will be sent.
4. Search for and select your spreadsheet from your local storage.
5. Click **Import and Email Result**

janison

Search

Administrator

Activity Summary Manage Attempts Discussion Forums My Learning My Learning Transcript Browse Learning Manage My Tokens Tags

## Add Competencies from spreadsheet

✓ Tasks

You can add new Competencies from a spreadsheet (Template) 1

Allow Competency Set Creation 2

Email Address 3

Spreadsheet File 4 Select File...

Import and email result 5

## Import Competency User Status

You may have information about when Users acquired certain Competencies and you wish to import it into the CLS system. This can be done using a spreadsheet.

To do so select **Manage Learning > Manage Competencies**.

Click **Import Competency User Status** from the **Actions** drop-down menu.

Manage Learning

Payment Transactions  
Manage Catalogue  
Manage Sessions  
Enrolments  
**Manage Competencies**  
Endorsement Queue  
Manage CPD  
Manage CPD progress  
Assign Learning  
Add Learning  
Manage Learning Assets  
Approve Learning  
Assessment Events

## Manage Competencies

Actions

Search for Competency

Active (2) Inactive (0)

☐ Code

Description

☐ performance-management-and-effectiveness  
performance-management-and-effectiveness  
Competency linked to Sets (0), Catalogue Items (1), Learning Assets (0)

Add Competency  
Add Competency Set  
Manage Competency Set Types  
Manage Competency Requirements  
Manage Compliance with Competency Requirements  
Import Competencies  
**Import Competency User Status**

1. Download the default spreadsheet template, populate it with your data and save it on your local storage. Alternatively, set your own spreadsheet out with the same columns as the template.
2. Select an email address where the summary of import is sent.
3. Search for and select your spreadsheet from your local storage
4. Click **Import and Email Result**.

Search

Administrator

Activity Summary
Manage Attempts
Discussion Forums
My Learning
My Learning Transcript
Browse Learning
Manage My Tokens
Tags

## Add Competency User Status from spreadsheet

✓ Tasks

You can add new Competencies from a spreadsheet [Template](#)

Email Address

2

Spreadsheet File

3

Select File...

Import and email result

4

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