PeopleFluent Learning

HR Administration

Release 24.04

Contents

About HR Administration

HR administration deals with configuration and day-to-day tasks relating to human resources activities. The LMS does not include an HR Administrator system role by default, but your organization may choose to configure one to keep access to LMS user account administration separate from talent and performance related data access and functionality.

The majority of the feature access permissions required for HR administration tasks are related to the Certification Manager features and Competency Manager features, both of which are located in **System Roles > Manage Features**. Some system configuration may be required for specifying default notification email templates, along with access to the Email Template Editor to configure them.

HR administration involves tasks relating to the following features:

- Certifications

- Proficiency levels

- Competencies

- Job Profiles

To administer certifications, go to **Manage Center > Learning > Certification Manager** menu.

To administer proficiency levels, competencies and job profiles, go to **Manage Center > Talent > Competency Manager** menu.

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About Certifications

A Certification indicates a learner is formally recognized as having a particular achievement or skill set. Typically, certifications are provided upon completion of learning events or passing an exam. Learners can use them to demonstrate their skill in specific areas, and they can also be used by third-parties, such as LinkedIn, as evidence of course completion or skill attainment.

You can create certifications and award customizable certificates on completion of a course or learning program. Certifications can be awarded in the following ways:

- Automatically by the LMS on completion of one or more specific courses or exams

- Manually by another user, such as a manager or instructor, if the certification allows manual awarding

- Manually by the learner, if the certification allows self-awarding

You can assign a period of validity to certifications and configure email notifications and auto-enroll rules that are triggered when certifications expire. Certifications can be set to expire a number of days or years from the date they were awarded, or on a specific date each year.

You can categorize certifications by creating certification types. For example, you could have different certification types for internal and external courses. You can also group related certifications into pools for easy reference and assignment.

Like users and learning modules, certifications can have attributes. You can use attributes to add custom fields to certifications and PDF certificates. You can create attributes and reviewers can assign values to them when awarding certifications or importing certifications via the Awarded Certificates CSV Loader. Certification attributes are shown in certification reports and when reviewing learners' certifications in the Career Development Center.

Certifications can include PDF certificates, which provide proof of course completion or passing the associated exam. Learners can download their certificates and use them outside the PeopleFluent suite of applications. To issue certificates, you create and upload custom PDF templates with form fields that are dynamically filled in with learner and course information. These form fields can include module, user and custom attributes, such as an external reference, for example. Learners can download and print their own certificates.

> ⓘ Certifications do not have to include an actual certificate, but to generate certificates you must use the certification functionality.

You can configure permissions for certifications to specify access for other administrators.

The workflow steps to configure certifications and award them on course completion involves some or all of the following steps:

1. Create a certification pool.
2. Create a certification type.
3. Configure a certificate PDF with the relevant form fields.

4. Create certificate award attributes.

5. Configure an email template for the certification award message.

6. Configure an email template for the certification expiration reminder message.

7. Create the certification.

8. Assign it to a learning module or certification exam.

Some steps may be optional. For example, you may not need to create a new certification pool, if the appropriate pool has already been created.

For information about reviewing and awarding certifications in the Career Development Center, see the Team Review Guide, which is available to download from the Customer Community.

Administrators with unrestricted access to the *Certification Manager* features in System Roles (Manage Features > Certification Manager) can create and manage certifications.

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The Certifications Manager lists all certifications in the LMS for which you have at least read-only access permission. You can filter the list to search for certifications, and select how many to show on each list page, from 10 to 200. You can create, edit and delete certifications, and manage their language bundles in the Certifications Manager.

Administrators with read-only or unrestricted access to the *Certifications* feature in System Roles (Manage Features > Certification Manager) can view certifications. Unrestricted access is required to create, edit and delete them, as well as updating their language bundles.

To open the Certification Manager, go to **Manage Center > Learning > Certifications**.

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Filter the Certifications List

To search for certifications to work on, you can filter the list in the Certification Manager by one or more of these criteria:

- Certification Name/Description

- Certification Code

- Certification Pool

- Certification Type

- Status

- Issued By

Administrators with read-only or unrestricted access to the *Certifications* feature in System Roles (Manage Features > Certification Manager) can view and filter certifications in the Certification Manager.

To filter the list of certifications

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Enter or select the filter criteria at the top of the Certification Manager. Click **Show Filters** if they are not visible.
3. Click **Filter**. The list is updated to match the filter criteria.
4. To reset the list to clear the filter, click **Reset**.

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Create a Certification

Administrators with unrestricted access to the *Certifications* feature in System Roles (Manage Features > Certification Manager) can create certifications. For additional guidance on creating and editing certifications, see the Certification Field Reference.

To create a certification

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Click **+ Create Certification**. The Create Certification page opens.
3. Enter the certification details in the Certification Details section. You must enter a unique code and a name.
4. Select the PDF certificate to issue with the certification.
5. Enter the expiry and renewal policy details.
6. Click **Create certification**. The certification is added to the list in the Certifications page.
7. To configure access permissions, edit the certification and click the **Permissions** link.

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Certification Properties Field Reference

Certification properties are divided into three groups of fields on the Certifications page:

- Certification Details

- Certificate

- Expiration/Renewal Policy

Administrators with unrestricted access to the *Certification Manager* features in System Roles (Manage Features > Certification Manager) can create and manage certifications.

Certification Details

Table: Certification Details Properties Reference

Field	Description
Certification Code	Enter a unique code to identify the certification. This field is mandatory.
Certification Name	Enter a name for the certification. This field is mandatory.
Certification Pool	Select a certification pool from the drop-down list to assign the certification to a specific pool. You can filter certifications by certification pool in the Certifications page.
Certification Type	Select a certification type from the drop-down list to assign the certification to a specific type. You can filter certifications by certification type in the Certifications page.
Language	Select the primary language for the certification. You can add language bundles to certifications separately, according to the languages licensed for the LMS, and switch the primary language by selecting Manage Language Bundles from the certification's action menu on the Certifications page.

Active	Select this check box to make the certification active. Only active certifications can be awarded. Only awards for active certifications will be listed as current, flagged as expiring, and invoke auto-enrollments.
	Inactive certifications cannot trigger course enrollment when they expire.
	Learners cannot request approval for inactive certificates, and inactive certifications cannot be approved by other users.
	Inactive certifications cannot be awarded using the Awarded Certificates CSV Loader.
Issued By	Enter the name of the person or organization issuing the certification.
Certification Description	Enter a comment about the certification. Comments can be a maximum 255 characters.
Award Method	Select **Immediately** to award the certification immediately on course completion or passing an exam.
	Select **Award this certificate on the following date(s)** to enter the day and month to award the certification every year. Click **+ Add another date** to award the certification on multiple dates throughout the year.
Award Message	Click **Select** to open the Email Template Editor, where you can select or create the email template used to notify learners that the certification has been award to them.
Assigned Certification Exam	Click **Select** to open the Selector, where you can select the certification exam learners must pass in order to receive the certification. Leave this field blank if you want to award the certifications on completion of a course.
Certification Exam Delivery Language	If you selected a certification exam, you can select a delivery language for the exam that may be different to the exam's default primary language, as long as a language bundle exists for the exam.

Certificate

Table: Certificate Details Properties Reference

Field	Description
Certification Template (PDF form)	Click the **browse** icon to open the Repository Manager, where you can select the PDF certificate to attach to the certification.
Allow user to print the certificate	Select this check box to allow the PDF certificate to be downloaded from the LMS.
Attach certificate to notifications to	If you have selected an email template for the the certification award message, you can select the check boxes of the email recipients to attach the PDF certificate to their email notification.

Expiration/Renewal Policy

Table: Expiration/Renewal Policy Properties Reference

Field	Description
Expiry Date	There are three options for certification expiry: • Never (the certification never expires) • After a specific number of days after the date it was awarded, with an optional grace period to extend the validity until the end of the month it expires. • On a specific date, and optionally, for recurring certifications, on the same date for a specified number of years thereafter.
Base on previous expiry date	This option applies to certifications awarded at course completion, not by direct appraisers. If a previous certification is still valid, select this check box to base the certification's next expiry date on the expiry date of the previous certification. If the previous certification has expired, selecting this check box bases the certification's next expiry date ion the award date of the new certification.

Days Prior to Expiration for Sending a Reminder Message and to Re-enroll User in Module/Program	Enter the number of days before the certification expires to send a reminder email to learners with the certification to re-enroll in the corresponding course or program. Enter 0 if you do not want to send emails to remind learners to re-enroll.
Certification Expiration Reminder Message	If a certification expiration reminder email template is not already selected, click **Select** to select the email template to use to send the expiration reminder email.
When this certification expires, automatically enroll the learner in selected module	Select this check box and click **Select** to automatically enroll affected learners in a course or program.
Only learner who meet following criteria can be automatically enrolled	Select this check box to configure the selection criteria the LMS will use to select the learners for automatic enrollment in the course or program specified above.

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About Certifications

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Edit a Certification

You can edit certifications that you created or those for which you have unrestricted access permission. When you create a new certification, you edit it if you want to configure access permissions for other administrators.

Administrators with unrestricted access to the *Certifications* feature in System Roles (Manage Features > Certification Manager) can edit certifications. For more information, see the Certification Field Reference.

To edit a certification

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Filter the list of certifications, if required, to locate the certification to edit.
3. Click the name of the certification you want to edit. The Edit Certification page opens.
4. Update the fields as required.
5. Click **Save**.

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Delete a Certification

You can delete certifications you have created or those for which you have been given unrestricted access permission. You can delete individual certifications from their action menu on the Certifications page, or bulk delete multiple certifications.

Administrators with unrestricted access to the *Certifications* feature in System Roles (Manage Features > Certification Manager) can delete certifications.

To delete a certification

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Filter the list of certifications, if required, to locate the certification or certifications to delete.
3. To delete an individual certification, select **Delete** from its action menu.
4. To delete multiple certifications at once, select their check boxes and then select **Delete** from the Bulk Action drop-down list.
5. Click **OK** to confirm the deletion.

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About Certification Language Bundles

A language bundle is a collection of localizable fields and language-specific contents in a given language that can be added to various LMS objects. You can add language bundles to certifications to provide the name, description and a translated PDF certificate in any of the languages for which there is a license in the LMS.

You can add and edit language bundles for individual certifications, and select the primary language bundle, which is the language used to display the certification information in the LMS. If the primary language is not available, the next language bundle in the list is used, if available.

You can configure access permissions for certification language bundles to provide or restrict access for other administrators.

For more information about multi-language support for the LMS, please refer to the EN600 Multi-language Content Support Implementation Guide.

Administrators with unrestricted access to the *Certification Manager* feature in System Roles (Manage Features > Certification Manager) can create and manage language bundles for certifications.

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Add a Certification Language Bundle

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Add a Certification Language Bundle

You can add a language bundle to a certification to deliver the certification's name, description and a translated PDF certificate in the user's preferred language, subject to availability.

Administrators with unrestricted access to the *Certification Manager* feature in System Roles (Manage Features > Certification Manager) can add language bundles to certifications.

To add a language bundle

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Filter the list of certifications, if required, to locate the certification to add a language bundle to.
3. Select **Manage Language Bundles** from the certification's action menu. The Manage Language Bundles page opens with a list of the language bundles configured for the certification.
4. Click **+ Add Language Bundle**. The Add Language Bundle dialog opens.
5. Select a language to assign to the certification.
6. Enter the certification name in the new language.
7. Click **Add**. The new language bundle is added to the list.
8. To update the certification description and add a PDF certificate to the language-specific certification, select **Edit** from the certification's action menu. The Edit Bundle Content page opens.
9. Enter a description in the bundle's language.
10. Select a PDF certificate in the bundle's language.
11. Click **Save**.

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About Certification Language Bundles

Edit a Certification Language Bundle

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Edit a Certification Language Bundle

You can edit a certification language bundle to update the certification's name, description and a translated PDF certificate in the user's preferred language, subject to availability. Using the action menu on the Manage Language Bundles page, you can also change the language of certification language bundles, and configure their access permissions.

Administrators with unrestricted access to the *Certification Manager* feature in System Roles (Manage Features > Certification Manager) can edit certification language bundles.

To edit a certification language bundle

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Filter the list of certifications, if required, to locate the certification to edit the language bundle for.
3. Select **Manage Language Bundles** from the certification's action menu. The Manage Language Bundles page opens with a list of the language bundles configured for the certification.
4. Select **Edit** from the language bundle's action menu. The Edit Language Bundle dialog opens.
5. Update the name, description and PDF certificate as required.
6. Click **Save**.

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Delete a Certification Language Bundle

You can delete a certification language bundle when you no longer want to display certifications in a particular language.

Administrators with unrestricted access to the *Certification Manager* feature in System Roles (Manage Features > Certification Manager) can delete certification language bundles.

To delete a certification language bundle

1. Go to **Manage Center > Learning > Certifications**. The Certifications page opens.
2. Filter the list of certifications, if required, to locate the certification to delete the language bundle for.
3. Select **Manage Language Bundles** from the certification's action menu . The Manage Language Bundles page opens with a list of the language bundles configured for the certification.
4. Select Delete from the language bundle's action menu.
5. Click **OK** in the Confirmation dialog. The certification language bundle is removed from the list.

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Add a Certification Language Bundle

Edit a Certification Language Bundle

Review Certifications

You can review the certificates awarded to all users who are visible to your account, and download multiple PDF certificates at once. This can be useful for scheduled or classroom training, where everyone gets a certificate when the course has finished.

Administrators with read-only access to the *Certification Review* feature in System Roles (Manage Features > Certification Manager) can view and download learners' PDF certificates. Administrators with unrestricted access can also delete learners' certifications.

To review certifications

1. Go to **Manage Center > Learning > Certification Review**. The Certification Review page opens with a list of certifications awarded to users who are visible to your account.
2. Filter the list, if required, to see the certifications you want to review.
3. To download a PDF certificate for a single user, select **Print** from the certification's action menu. A new browser window opens and downloads the PDF to your browser's default file download location.
4. To download some or all of the certificates, select their check boxes (or select the all check box in the table heading row) and then select **Print** from the Bulk Action drop-down list.
5. To delete a certification awarded to a single user, select **Delete** from the certification's action menu and then click **OK** in the confirmation dialog. The certification is removed from the user's award certifications.
6. To delete some or all of the certifications, select their check boxes (or select the all check box in the table heading row) and then select **Delete** from the Bulk Action drop-down list.

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About Certifications

eSignatures for Certifications

If your organization has licensed the Code of Federal Regulation record keeping (CFR 21) feature for the LMS, there are two system configuration settings you can enable that relate to auditing actions related to certifications. You can specify whether eSignatures are required to edit or delete certifications, and you can specify whether an eSignature is required to award certifications or delete certification awards in the Career Development Center.

The eSignature system configuration options are *Enable eSignature for Certification update/ delete* and *Enable eSignature for awarding/deleting User Certifications*.

Activity with eSignatures is available in compliance reports *R505 - Audit Trail Report*, and *R506 - Audit Trail User Action Report*.

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About Certification Pools

You can group related certifications into pools for easy reference and administration from the Certifications page, where you can filter the list of certifications by pool. You can configure access permissions for other administrators for certification pools. You create, edit and delete certification pools in the Certification Pool page.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can create, edit and delete certification pools. Administrators with read-only access can only view them.

To manage certification pools, go to **Manage Center > Learning > Certification Pool**.

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Create a Certification Pool

You can create certification pools to group related certifications.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can create certification pools.

To create a certification pool

1. Go to **Manage Center > Learning > Certification Pool**. The Certification Pool page opens.
2. Enter the name for the new certification pool.
3. Click **Add**. The pool is added to the Certification Pool list.
4. To configure access permissions for other administrators, select the pool from the drop-down list and click **Permissions**. The Permissions Selector opens.
5. Configure the permissions and click **Save**.

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Edit a Certification Pool

You can edit certification pools that you created or those for which you have unrestricted access permission. When you edit a certification pool, you can rename it and update its access permissions.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can edit certification pools.

To edit a certification pool

1. Go to **Manage Center > Learning > Certification Pool**. The Certification Pool page opens.
2. Select the certification pool you want to edit from the Certification Pool drop-down list.
3. To rename the pool, enter a new name and click **Update selection**.
4. To configure the access permissions for the selected pool, click **Permissions**. The Permissions Selector opens.
5. Configure the permissions and click **Save**.

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Delete a Certification Pool

You can delete certification pools that you created or those for which you have unrestricted access permission, and you can delete only certification pools that do not have any certifications assigned to them. If you try to delete a pool that has one or more certifications assigned to it, the message *Sorry, but this entry is still in use and so cannot be deleted* is displayed.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can delete certification pools.

To delete a certification pool

1. Go to **Manage Center > Learning > Certification Pool**. The Certification Pool page opens.
2. Select the certification pool you want to delete from the Certification Pool drop-down list.
3. Click **Delete selection** and then click **OK** to confirm the deletion.

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About Certification Types

You can create certification types to categorize certifications, such as internal, external, or level of attainment. You can filter the list of certifications in the Certifications page by type. You create, edit and delete certification types in the Certification Type page.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can create, edit and delete certification types. Administrators with read-only access can only view them.

To manage certification types, go to **Manage Center > Learning > Certification Type**.

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About Certifications

Create a Certification Type

You can create certification types to categorize certifications, such as internal, external, or level of attainment.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can create certification types.

To create a certification type

1. Go to **Manage Center > Learning > Certification Type**. The Certification Type page opens.
2. Enter the name for the new certification type.
3. Click **Add**. The type is added to the Certification Type list.

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About Certifications

Rename a Certification Type

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can rename certification types.

To rename a certification type

1. Go to **Manage Center > Learning > Certification Type**. The Certification Type page opens.
2. Select the certification type you want to rename from the Certification Type drop-down list.
3. Enter a new name and click **Update selection**.

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Delete a Certification Type

You can delete certification types that you created or those for which you have unrestricted access permission, and you can delete only certification types that do not have any certifications assigned to them. If you try to delete a type that has one or more certifications assigned to it, the message *Sorry, but this entry is still in use and so cannot be deleted* is displayed.

Administrators with unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager) can delete certification types.

To delete a certification type

1. Go to **Manage Center > Learning > Certification Pool**. The Certification Type page opens.

2. Select the certification type you want to delete from the Certification Type drop-down list.

3. Click **Delete selection** and then click **OK** to confirm the deletion.

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About PDF Certificates

You can create PDF certificates and assign them to certifications. When learners gain a certification with an associated certificate, they can download the PDF (if configured in the certification). Reviewers can print PDF certificates in bulk when reviewing learners' certifications in the Certifications Review page.

PDF certificates can include both static text and images, as well as dynamically generated data related to the circumstances under which they are awarded. You can include fields in PDFs, which the LMS then populates when the certificate is generated. For example, you can include the name of the course, the participant's name, and the date the certificate was awarded. Module and user attributes can also be included. For a list of all fields you can include in a PDF, see Form Fields for PDF Certificates.

For more information about creating PDFs with dynamic form fields, see How to Create Fillable PDF Files on the Adobe Acrobat website.

You can create PDF certificates in Microsoft Word or Adobe Acrobat. You upload them to the LMS Repository and then assign them to certifications. When you configure certifications with PDF certificates, you can specify whether learners are allowed to view and print them.

Administrators with unrestricted access to the *Repository Manager* features in System Roles (Manage Features > Manage Features) can upload PDF certificates to the Repository.

Administrators with unrestricted access to the *Certification Manager* features in System Roles (Manage Features > Certification Manager) can create and manage certifications.

To assign a PDF certificate to a certification, go to **Manage Center > Learning > Certifications** and create or edit the certification.

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Upload a File to the Repository

Form Fields for PDF Certificates

Use the table below to help you add dynamic fields to PDF forms. The LMS populates the PDF fields when it generates the certification the PDF certificate is assigned to.

When creating a PDF form, add text fields and name them using the Field IDs in this table.

Table: Form Fields for PDF Certificates

Object	Field	Field ID
Certificate	Certificate ID	CertificateId
Certificate	Certification Code	CertificateCode
Certificate	Certification Name	CertificateName
Certificate	Award ID	AwardId
Certificate	Award Date	AwardDate
Certificate	Expiration Date	ExpirationDate
Certificate	Serial Number	SerialNumber
Certificate	System Timestamp	SystemTimestamp
Course	Course ID	CourseId
Course	Course Name	CourseName
Course	Duration Comments	CourseDuration
Course	Course start date	CourseStart
Course	Course end date	CourseEnd
Course	Objectives	Objective1, … , ObjectiveX
Course	Module Description	ModuleDescription
Course	Session Title	SessionTitle
Course	Facility Code	FacilityCode
Course	Updater's legal name	UpdaterLegalName
Course	Signed Date	SignedDate

Course	Update Meaning	UpdateMeaning
Course	All Module Attributes	AllModuleAttrs
Course	Performance Grade	PerformanceGrade
Course	Score	FinalScore
Course	Credits	TrainingCredits
Learner	User Name	UserName
Learner	User Name (First Name then Last Name)	UserFirstLastName
Learner	First Name	UserFirstName
Learner	Last Name	UserLastName
Learner	User ID	CurrentPid
Learner	Employee Number	EmployeeNumber
Learner	Job Title	JobTitle
Learner	User Attributes	UserAttr1, ... , UserAttr8
Learner	Date of Birth	DateOfBirth
Learner	Address 1	Address1
Learner	Address 2	Address2
Learner	City	City
Learner	Department Name	DepartmentName
Instructor	Instructor Name	Instructor1Name, ... , InstructorXName
Instructor	Instructor Job Title	Instructor1JobTitle, ... , InstructorXJobTitle
Instructor	Instructor Department Name	Instructor1DepartmentName, ... , InstructorXDepartmentName

Instructor's Direct Appraiser	Instructor's Direct Appraiser Name	Instructor1DaName, ... , InstructorXDaName
Instructor's Direct Appraiser	Instructor's Direct Appraiser Job Title	Instructor1DaJobTitle, ... , InstructorXDaJobTitle
Instructor's Direct Appraiser	Instructor's Direct Appraiser Department Name	Instructor1DaDepartmentName, ... , InstructorXDaDepartmentName
Task Approver	Approver Name	ApproverName

To add module or user attributes to certificates, use the following Field IDs:

- ModuleAttr-*AC* (where *AC* is the attribute's code)

- UserAttr# (where # is the attribute number. For example, UserAttr1.)

- UserAttr-*label* (where *label* is the attribute extension label)

Additional Information

About PDF Certificates

How to Create Fillable PDF Files

About Certificate Award Attributes

When certifications are awarded to learners in the Career Development Center or via the Awarded Certificates CSV Loader, you can add custom attributes to record additional information about the certification award. These attributes are included in the certification details page and certifications reports.

Like module and user attributes, certificate award attributes can be any of the following data types, which determine what type of values can be assigned to them:

- Free text (a single line of text up to 255 characters)

- Text area (multiple lines of text)

- Drop-down (select the value from a list)

- Numeric (In PeopleFluent Learning versions up to and including 21.04, fractional numbers less than *1* must start with a zero; for example, 0.75, not .75).

- Check box

- Date (a calendar tool to select a date)

You can configure access permissions for certificate award attributes, therefore administrators can assign values only to those that they have read-only or unrestricted access permission for when awarding certifications.

Administrators with unrestricted access to the *Certification Award Attributes* features in System Roles (Manage Features > Certification Manager) can create, edit and delete certificate award attributes and their access permissions.

To manage certificate award attributes, go to **Manage Center > Learning > Certificate Award Attributes**.

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Delete a Certificate Award Attribute

About the Awarded Certificates CSV Loader

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Create a Certificate Award Attribute

You can create certificate award attributes to include additional information to certifications awarded to learners in the Career Development Center or uploaded via the Awarded Certificates CSV Loader.

Administrators with unrestricted access to the *Certification Award Attributes* features in System Roles (Manage Features > Certification Manager) can create certificate award attributes.

> ⓘ   When you create a new certificate award attribute you have to save it before you can configure its access permissions or add any options for drop-down list attributes.

To create a certificate award attribute

1. Go to **Manage Center > Learning > Certificate Award Attributes**. The Certificate Award Attributes page opens with a list of the attributes you have at least read-only permission for.
2. Click **+ Create Certificate Award Attribute**. The Create Certificate Award Attribute page opens.
3. Enter a unique attribute code.
4. Enter a name of the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. Select the type of data represented by the attribute.
6. For numeric attributes, select the check box if you want to show the sum of the values when printing or reporting the attribute.
7. Click **Save**. The attribute is added to the list in the Certificate Award Attributes page.

Additional Information

About Certificate Award Attributes

Edit a Certificate Award Attribute

About the Awarded Certificates CSV Loader

Edit a Certificate Award Attribute

When you can edit a certificate award attribute you can:

- Change its code and name

- Configure its access permissions

- Configure the value options for drop-down list attributes

- Change its data type

There are restrictions on changing an attribute's type. For more information, see Allowed Transitions Between Dynamic Attribute Types.

You can edit certificate award attributes that you have unrestricted access permission for.

Administrators with unrestricted access to the *Certification Award Attributes* features in System Roles (Manage Features > Certification Manager) can edit certificate award attributes.

To edit a certificate award attribute

1. Go to **Manage Center > Learning > Certificate Award Attributes**. The Certificate Award Attributes page opens with a list of the attributes you have at least read-only permission for.

2. To edit an attribute's permissions only, select **Permissions** from its action menu. The Permissions Selector opens in a new window.

3. To edit an attribute's properties and permissions, select **Edit** from its action menu. The Edit Certificate Award Attribute page opens.

4. Update the attribute's properties as required.

5. To add an option to a drop-down list attribute, click **Add New Option**. The Create Certificate Award Attribute Values list opens.

6. To edit or delete an option for a drop-down list attribute, click the option's code. The Edit Certificate Award Attribute Value page opens, where you can edit or delete it.

7. Optionally, click **Permissions** to edit the attribute's permissions.

8. Click **Save**.

Additional Information

About Certificate Award Attributes

Attribute Option Values

Allowed Transitions Between Dynamic Attribute Types

Permissions

Delete a Certificate Award Attribute

You can delete certificate award attributes only if they are not used in any live certifications awarded learners. Learners' certifications are listed in the Certifications page in their Career Center, and you can also see which certifications have attributes by running the Certifications reports. You also must have unrestricted access permission for a certification to delete it.

Administrators with unrestricted access to the *Certification Award Attributes* features in System Roles (Manage Features > Certification Manager) can delete certificate award attributes.

To delete a certificate award attribute

1. Go to **Manage Center > Learning > Certificate Award Attributes**. The Certificate Award Attributes page opens with a list of the attributes you have at least read-only permission for.

2. Select **Delete** from the action menu of the certificate award attribute you want to delete.

3. Click **OK** in the confirmation dialog.

Additional Information

About Certificate Award Attributes

About the Awarded Certificates CSV Loader

You can award certifications to one or more learners at once, or delete certifications from learners' transcripts, via the Awarded Certificates CSV Loader. For each certification award, you can specify the URL of a PDF certificate.

To get started, you can download a CSV file template and populate the required fields offline in a spreadsheet application or text editor. The LMS provides information to help you fill in the CSV template, such as the expected values for each field. For more information, see Awarded Certificates CSV Loader Field Reference.

When awarding a certification, the mandatory fields are:

- Action

- UserID

- Certification_title or certification_code

- Date_achieved

- Is_self_awarded

When deleting a certification, you must also specify the award_id.

Administrators with unrestricted access to the *Awarded Certificates CSV Loader* feature in System Roles (Manage Features > Certification Manager) can import awarded certificates CSV files.

To import awarded certificates data and review previous imports, go to **Manage Center > Learning > Awarded Certificates CSV Loader**.

Preparing CSV Files for Import

To prepare a user CSV file for import, you can download a template CSV file from the Awarded Certificates CSV Loader page and populate the fields as required. The CSV file template includes any certificate award attributes (prefixed with *CT-*).

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

> ⚠ If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (*" "*). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Additional Information

Import Awarded Certificates

Awarded Certificates CSV Loader Field Reference

About Certifications

About PDF Certificates

Import Awarded Certificates

You can award certifications to one or more learners at once, or delete certifications from learners' transcripts, via the Awarded Certificates CSV Loader. You must first populate in a comma—or semicolon—separated values (CSV) file a row for each user you want to award a certification to or delete a certification from. For more information, see Awarded Certificates CSV Loader Field Reference.

Administrators with unrestricted access to the *Awarded Certificates CSV Loader* feature in System Roles (Manage Features > Certification Manager) can import awarded certificates CSV files.

To award or delete certifications via the Awarded Certificates CSV Loader

1. Go to **Manage Center > Learning > Awarded Certificates CSV Loader**. The Awarded Certificates CSV Loader page opens and lists your previous imports, if any.

2. To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.

3. If required, download the CSV file template and enter the certification award information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

4. Click **+ Import CSV file**.

5. Click **Choose File** to select the CSV file to upload.

6. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

7. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

10. If any records failed to import, you can go back to the Awarded Certificates CSV Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

Awarded Certificates CSV Loader Field Reference

About the Awarded Certificates CSV Loader

About Certifications

Awarded Certificates CSV Loader Field Reference

Use the reference table below to help you correctly format the awarded certificates data you want to import via the Awarded Certificates CSV Loader.

Administrators with unrestricted access to the *Awarded Certificates CSV Loader* feature in System Roles (Manage Features > Certification Manager) can import awarded certificates CSV files.

To import awarded certificates data and review previous imports, go to **Manage Center > Learning > Awarded Certificates CSV Loader**.

> ⓘ If certificate award attributes have been defined, they are added to the end of the CSV file and prefixed with *CT-.*

Table: Awarded Certificates CSV Loader Field Reference

Field	Content	Data Handling
ACTION	Action	*A* for Add or *D* for Delete
USERID	User ID	Mandatory. The user ID of the user to award the certification to.
CERTIFICATION_TITLE	Certification Name	Either a certification code or a certification name must be provided. If a certification code is not provided, the row will be skipped if more than one certificate matches the given certification name.
CERTIFICATION_CODE	Certification Code	A unique value among certificates. Either a certification code or a certification name must be provided.
AWARD_ID	Award ID	The Award ID of the certificate award. Mandatory when deleting certification awards, this is automatically generated when adding records.
DATE_ACHIEVED	Achievement date	Mandatory. If not specified, the record will be skipped. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration).

EXPIRE_DATE	Expire date	Optional. If not specified, it will be computed based on the certification validity period and the achievement date. Preferred Date Format: dd-MMM-yyyy (as specified in System Configuration).
COMMENTS	Comments	Optional. Maximum 255 characters. The import process skips records with invalid comments and generates an error report.
ASSIGNMENTID	Assignment ID	Optional. The ID of the users assignment in which the certification should be awarded.
IS_SELF_AWARDED	Is Self Award	Mandatory. Must be *Y* or *N*. • Y - Yes • N - No
STATUS	Status	Conditional. When IS_SELF_AWARDED = Y, Status is required. Must be 0, 1, 2, 3 or 4. • 0 - Open for Editing • 1 - Pending Approval • 2 - Approved • 3 - Approval Denied • 4 - Cancelled

ATTACHMENT_URL	Absolute or relative URL	Optional. A valid URL for the PDF certificate attachment. For example, `http://www.abc.com/tec101.pdf` or `/nd/fresco/repository/tec.pdf`. URLs can be a maximum of 255 characters in length, and must be accessible by the LMS without any additional authorization, such as Single Sign-On (SSO) authorization. The import process skips records with invalid URLs and generates an error report. The maximum PDF attachment size 5 MB.
CT-*DropDownAttribute Code*	Value for certificate award drop-down attribute with specified attribute code	Code related to the drop-down value to set for the attribute. Enter `NONE` to clear.
CT-*DateAttribute Code*	Value for certificate award date attribute with specified attribute code	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m. Enter `NONE` to clear.
CT-*AttributeCode*	Value for certificate award attribute with specified attribute code (not of drop-down or date type)	Any Text (Max field length:2,000). Enter `*NONE*` to clear.

Additional Information

[About the Awarded Certificates CSV Loader](#)

[Import Awarded Certificates](#)

[About Certificate Award Attributes](#)

About Competency Models

Competency models are containers you use to organize competencies. For example, you could configure separate competency models for different geographies, job roles, or specific areas of knowledge. Competency models have a hierarchical structure, enabling models to have sub-models. Competencies in a parent model are shared among its sub-models, while keeping sub-models' competencies separate.

You configure competency models and competencies in the Competency Models page. From the Competency Models *Tools* action menu, you can select some or all of the following options, depending on your access permissions for the selected model:

- Rename the selected competency model

- Map the selected competency model to a job profile so that users with that job profile are required to achieve the competencies specified by the model (and its sub-models).

- Configure access permissions for the selected competency model to restrict access to their competencies to the appropriate learners, and to specify which administrators can view or edit them.

- Open the Competency Data Loader, where you can import competencies from a comma-separated values (CSV) formatted file.

Administrators with unrestricted access to the *Competency Models* feature in System Roles (Manage Features > Competency Manager Features) can create, edit and delete competency models and competencies.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can map competency models and competencies to job profiles.

To configure competency models and competencies, go to **Manage Center > Talent > Competency Models**.

Additional Information

Create a Competency Model

Edit a Competency Model

Delete a Competency Model

About the Competency Data Loader

About Competency Groups

About Competencies

Create a Competency

Permissions

Permissions

Create a Competency Model

You can create a competency model to contain one or more related competencies. To specify which learners can be awarded the competencies you add to it, you configure access permissions for the model instead of configuring them for each competency in the model individually.

Administrators with unrestricted access to the *Competency Models* feature in System Roles (Manage Features > Competency Manager Features) can create competency models.

To create a competency model

1. Go to **Manage Center > Talent > Competency Models**. The Competency Models page opens with a list of the models at the top level of the hierarchy.
2. Select the parent competency model under which to create a new competency model.
3. Click the **Add competency model** icon. A new competency model is added as a child of the selected model.
4. Enter a name for the new model and press Return.

Additional Information

About Competency Models

Edit a Competency Model

Delete a Competency Model

Create a Competency

Permissions

Edit a Competency Model

When you edit a competency model, you can rename it, map its competencies to a job profile, and configure its access permissions.

Administrators with unrestricted access to the *Competency Models* feature in System Roles (Manage Features > Competency Manager Features) can edit competency models.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can map competency models and competencies to job profiles.

To edit a competency model

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the competency model you want to edit. You may need to expand the model hierarchy.
3. Click the action menu above the list and select an option from the drop-down list.

Additional Information

About Competency Models

About Job Profiles

Permissions

Delete a Competency Model

⚠ Deleting a competency model also deletes its sub-models and all competencies within it and its sub-models. Any competencies in a deleted model are also deleted and removed from job profiles they have been mapped to.

Administrators with unrestricted access to the *Competency Models* feature in System Roles (Manage Features > Competency Manager Features) can delete competency models.

To delete a competency model

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the competency model you want to delete.
3. Click the **Delete competency model** icon.
4. Click **OK** in the confirmation dialog.

Additional Information

About Competency Models

About Job Profiles

About Competencies

A competency can either be a specific learned ability that you need to perform a given job well, sometimes called a skill, or the application of knowledge to be successful in a given job. Typically, a competency is defined by a set of courses provided via the LMS. Competencies are acquired by fulfilling the training requirements, which can include completing one or more courses and passing any associated exams. This functionality has a broad array of options to support companies who adopt a skills-based learning process or who want to improve their re-skilling process.

You can specify different *Proficiency Levels* for competencies to provide multiple levels of attainment for learners. Proficiency levels are configured separately and can be applied to multiple competencies.

Competencies are closely related to *Job Profiles*. You can assign competencies to job profiles individually and by competency model, so that employees who are assigned the job profile are enrolled in the courses required to acquire those competencies. Users are automatically enrolled in courses assigned to competencies only if the Auto Enroll Targets are set at the course level.

Competencies are awarded to learners after assessment. Competencies can be assessed and awarded to learners in several ways, subject to their configuration:

- By a reviewer (for example, their direct appraiser)

- By learners themselves (self-assessment)

- Automatically, by the LMS, based on learners' completed courses

You can set the status of competencies to make them active or inactive. Only activated competencies can be assigned and awarded to learners, listed as current or expiring, or included in automated processing for competencies.

Competencies can have a fixed period of validity, with an expiry date set by the assessor or a specific number of days after the competency is awarded. They can also be revoked automatically when mandatory training material is added or when new revisions of mandatory training (that requires the effective revision) are published.

You define competencies within *Competency Models*, which are used to organize competencies. For example, you could configure separate competency models for different geographies, job roles, or specific areas of knowledge. You can configure access permissions for competency models to restrict access to their competencies to the appropriate learners, and to specify which administrators can view, edit, award and revoke them in the Manage Center and Career Development Center.

You can import competencies via the Competency Data Loader, and update their expiry dates via the Competency Expiry Data Loader.

You can import competency libraries from the Skills Framework for the Information Age (SFIA), and add their competencies to your competency models.

If the *Enable competency groups* system configuration setting is enabled, you can also create groups of competencies for convenient assignment to job profiles. For example, if you frequently reference the same competencies when defining management-related job profiles, you can create a competency group called Management, and select the group, rather than individual competencies, when defining management job profiles. You can assign a certification to a competency group so that when employees have acquired all of the competencies in a group, they are awarded the corresponding certification.

For information about reviewing and awarding competencies in the Career Development Center, see the Team Review Guide, which is available to download from the Customer Community.

Competencies are available with the eLearning+, Learning and legacy Performance licenses only.

Administrators with unrestricted access to the *Competency Manager features* in System Roles (Manage Features > Competency Manager Features) can configure the competency features described here, and award and revoke competencies in the Manage Center.

Additional Information

About Proficiency Levels

About Competency Models

About Competency Groups

Create a Competency

Review Competencies in the Manage Center

About the Competency Data Loader

About the Competency Expiry Data Loader

About Job Profiles

About SFIA Libraries

About the Career Development Center

Competency Manager Features Access Permissions

Create a Competency

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can create competencies and add them to a competency model.

To create a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model in which to create a new competency.
3. Click the **+ Create Competency**. The new competency's Details tab opens.
4. Enter the details for the new competency.
5. Click **Save**. The competency is added to the list for the selected model.

Additional Information

Competency Details Field Reference

About Competencies

Edit a Competency

Clone a Competency

Delete a Competency

Competency Details Field Reference

The Competency Details page is divided into the following sections:

- Competency Details

- Proficiency Level

- Recognition Policy

- Learning Modules

- Notification Settings

- Job Profiles

Use the tables below for each section to help you create a competency.

Competency Details

Table: Competency Details

Field	Description
Reference Code	Enter a unique reference code for the competency, up to a maximum of 85 characters. This field is mandatory.
Title	Enter a title for the competency up to a maximum of 85 characters. This field is mandatory.
Model	Click the field to select the competency model the competency is saved to.
Source Library	This field is for information only. It is only populated when editing a competency. If the competency was added to the model from an imported SFIA library, the name of the library is displayed.
Description	Enter a description for the competency up to 6,000 characters.
Language	The default value of Multi-language means that the competency is displayed in the same language regardless of users' preferred language setting in their profile. If your LMS has licensed additional languages, you can select a language bundle from the drop-down list.

Active	Select this check box to activate the competency. Only activated competencies can be assigned and awarded to learners, listed as current or expiring, or included in automated processing for competencies.

Proficiency Level Details

Table: Proficiency Level Details

Field	Description
Level Group	Select the proficiency level group from the drop-down list. All levels defined for each group are listed below.
	You can click the **Edit** icon to edit the Level Title and Description fields for each level, if required. Editing the level for the competency does not change the original proficiency level values defined in the Proficiency Levels page.
	You can click the **Trashcan** icon to remove the proficiency level from the competency. This does not delete the level from the original proficiency level group defined in the Proficiency Levels page.
	ⓘ When editing competencies, you cannot change the proficiency level group if the competency is already assigned to a job profile.
Level	Select a level from the proficiency level group to add to the competency. This drop-down list is enabled only when levels have been removed, and for SFIA library competencies that do not include all levels by default.

Recognition Policy Details

Table: Recognition Policy Details

Field	Description

Training	Select this check box to specify that the competency is awarded based on the completion of one or more courses. You add courses to the Learning Modules section. You can add all of the courses relevant to the competency and require the learner to complete all or just some of them.
This competency requires that ALL of the assigned learning modules be completed	If the Training check box is selected, select this option if the learner must complete a specific set of courses (listed in the Learning Modules section) to be awarded the competency.
The target level required is	If all of the assigned courses must be completed, select the proficiency level that must be achieved.
# of the listed learning modules (including mandatory)	If the Training check box is selected, select the number of courses from the list in the Learning Modules section the learner must complete to be awarded the competency. This option can be used to provide the learner with some choice as to which courses they take to achieve the competency.
Ad Hoc Self-Assessment	Select this check box to enable learners to award themselves the competency in the Career Development Center or Career Center.
Ad Hoc Reviewer Assessment	Select this check box to enable reviewers to award the competency to the learner when reviewing in the Career Development Center. Selecting this check box enables the following options in the Recognition Policy section: • Minimum x Day(s) of Waiting Period for Re-Ad Hoc Assessment • Ad hoc Assessment Expiry
Minimum x Day(s) of Waiting Period for Re-Ad Hoc Assessment	For ad hoc reviewer assessments, select the minimum number of days or years that must elapse between assessments.

Ad hoc Assessment Expiry	Select an option to specify whether the ad hoc assessment expires and if so, whether it requires the assessor to specify the expiry date when awarding the competency, or whether the competency expires a fixed number of days after being awarded.

Learning Modules Details

Table: Learning Modules Details

Field	Description
Learning Modules	Click the **Search** icon to open a paginated drop-down list of all learning modules visible to you.
	Alternatively, start typing some or all of the learning module ID or title to populate the drop-down list with matching results.
	Click the **Next** and **Previous** icons to page through the results.
	Adding a course to the competency does not necessarily mean that learners must complete the course to be awarded the competency. It depends on the options specified in the Recognition Policy section and whether its check box is selected in the Learning Modules list.
	For each learning module, you can select:
	• Revision (any or active)
	• The validity in days or years
	• The target proficiency level
Revoke competency when mandatory training material is added to competency or when new revisions of mandatory training requiring the effective revision is published	Select this check box to revoke the competency when mandatory training material is added to competency or when new revisions of mandatory training requiring the effective revision is published.
	To enable learners to complete the required learning before losing the competency, you can specify a grace period. Otherwise, select Revoke at next Auto Competency Revocation Task.

For mandatory modules, apply a renewal period and automatically re-enroll learners *x* days or years prior to module expiration	Select this check box to automatically re-enroll learners in mandatory courses for the competency at a specified number of days or years before the course expires. Enter the number or days or years.
During the renewal period, on completion of the learning module apply the validity period from	Select one of the options: • The date of completion of the learning module • The previous module expiration date. (Calculation of competency expiry from previous module expiration date is not supported if Equivalency Rules have been configured.)

Notification Settings Details

Table: Notification Settings Details

Field	Description
Send reminder *x* days before learning modules expire	Enter the number of days before learning modules expire to send a reminder to learners who completed the course to gain the competency.
Send notification when this competency has entered the grace period or has been revoked.	Select this check box to send a notification when this competency has entered the grace period or has been revoked. A competency can be revoked due to a new module revision, an expired module, or an expired ad hoc assessment. You can select the email templates in the Competency Manager category in System Configuration.

Job Profiles Details

Table: Job Profiles Details

Field	Description

Job Profile Name	If the competency has been assigned to any job profiles, they are listed here. You can click the job profile name to open the job profile for editing in the Job Profiles page.
	You must save a new competency before you can assign it to a job profile in the Job Profiles page.

Additional Information

About Competencies

Create a Competency

Clone a Competency

Edit a Competency

Map a Competency to a Job Profile

You can assign competencies to job profiles individually and in bulk, so that employees who are assigned the job profile are automatically enrolled in the courses required to acquire those competencies.

Administrators with unrestricted access to the *Competency Models* and *Job Profiles* features in System Roles (Manage Features > Competency Manager Features) can map competencies and competency models to job profiles.

To map a competency to a job profile

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.

2. Select the model containing the competency you want to map to a job profile. Its competencies are listed on the right-hand side.

3. To map a single competency, select Map to Job Profile from the action menu of the competency. To map more than one competency from the model to the same job profile, select the check boxes of the competencies and the select Map to Job Profile from the Bulk Action drop-down list. The Map to Job Profile dialog opens.

4. Enter part or all of the name of the job profile and click **Search**.

5. Select the job profile from the list and click **Next**.

6. Select the required proficiency level from the drop-down list and click **Map to Job Profile**. The Result dialog confirms the mapping.

7. Click **Go to Job Profile** to open the job profile, or click **OK** to close the Result dialog.

8. Repeat steps 2 to 7 for each competency you want to map to a job profile.

Additional Information

About Competencies

About Job Profiles

Clone a Competency

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can clone competencies.

To clone a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to clone. Its competencies are listed on the right-hand side.
3. Select **Clone** from the action menu of the competency you want to clone. The new competency's Details tab opens.
4. Enter the details for the new competency.
5. Click **Save**. The competency is added to the list for the selected model.

Additional Information

Competency Details Field Reference

Edit a Competency

Delete a Competency

About Competencies

Edit a Competency

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can edit competencies.

To edit a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to edit. Its competencies are listed on the right-hand side.
3. Select **Edit** from the action menu of the competency you want to edit. The competency's Details tab opens.
4. Edit the details as required.
5. Click **Save**.

Additional Information

Competency Details Field Reference

Clone a Competency

Delete a Competency

About Competencies

Review Competencies in the Manage Center

Delete a Competency

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can delete competencies.

> ⓘ　　You cannot delete a competency that has been awarded and has not expired.

To delete a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to delete. Its competencies are listed on the right-hand side.
3. Select Delete from the action menu of the competency you want to delete.
4. Click **OK** in the confirmation dialog. The competency is removed from the list for the selected model.

Additional Information

About Competencies

User Search

You can see a list of users with a particular competency or job description in the User Search page.

Administrators with read-only access to the *User Search* feature in System Roles (Manage Features > Competency Manager Features) can search for users by job profile or competency.

To search for users

1. Go to **Manage Center > Talent > User Search**. The User Search page opens.
2. Select either **Job Profiles** or **Competencies** from the drop-down list.
3. Enter some or all of the name of the job profile or competency.
4. Click **Search**. Any users with a matching job profile or competency are listed in the table.
5. To filter the list on any of the columns, start typing the filter text in the Filter field.

Additional Information

About Competencies

About Job Profiles

Review Competencies in the Manage Center

You can view a list of learners who have been awarded a competency in the User Review tab for the competency. You can also award the competency to users and revoke it from users in the list.

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can review competencies in the User Review tab when editing a competency.

To review a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.

2. Select the model containing the competency you want to review. Its competencies are listed on the right-hand side.

3. Select **Edit** from the action menu of the competency you want to edit. The competency's Details tab opens.

4. Click the **User Review** tab. The User Review tab lists any users who have been awarded the competency.

Additional Information

Award Competencies in the Manage Center

Revoke Competencies in the Manage Center

About Competencies

Award Competencies in the Manage Center

You can award a competency to one or more learners in the competency's User Review tab in the Manage Center.

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can award competencies in the User Review tab.

To award a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to award. Its competencies are listed on the right-hand side.
3. Select **Edit** from the action menu of the competency you want to award. The competency's Details tab opens.
4. Click the **User Review** tab. The User Review tab lists any users who have been awarded the competency.
5. Click **+ Award Competency**. The Award Competency dialog opens.
6. Select the proficiency level of the competency to award and click **Next**.
7. Start typing the user ID or name of the users you want to award the competency to, or click the **browse** icon to open the User Selector, where you can search for users.
8. Select an expiry date for the competency, if required, and click **Next**.
9. Review the award details and click **Next**. The competency is awarded to the selected users.
10. Click **Close**. The users are added to the list in the User Review tab.

Additional Information

Review Competencies in the Manage Center

Revoke Competencies in the Manage Center

About Competencies

Revoke Competencies in the Manage Center

You can revoke a competency from one or more learners in the competency's User Review tab in the Manage Center.

> ⓘ After revoking a competency, it may later be re-awarded automatically if Training is selected in its Recognition Policy and the learner meets the training requirements.

Administrators with unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features) can revoke competencies in the User Review tab.

To revoke a competency

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to revoke. Its competencies are listed on the right-hand side.
3. Select Edit from the action menu of the competency you want to revoke. The competency's Details tab opens.
4. Click the **User Review** tab. The User Review tab lists any users who have been awarded the competency.
5. Select **Revoke Competency** from the action menu of the user you want to revoke the competency from. Alternatively, select the check boxes of multiple users and then select **Revoke Competency** from the Bulk Actions drop-down list.
6. Click **OK**. The user is removed from the list in the User Review tab.

Additional Information

Review Competencies in the Manage Center

Award Competencies in the Manage Center

About Competencies

About Competency Language Bundles

A language bundle is a collection of localizable and translatable fields and language-specific contents in a given language that can be added to various LMS objects. You can add language bundles to competencies to provide the title, description, and the title and description of their proficiency levels in any of the languages for which there is a license in the LMS.

You can add and edit language bundles for individual competencies, and select the primary language bundle, which is the language used to display the certification information in the LMS. If the primary language is not available, the next language bundle in the list is used, if available.

You can configure access permissions for competency language bundles to provide or restrict access for other administrators.

For more information about multi-language support for the LMS, please refer to the EN600 Multi-language Content Support Implementation Guide.

Administrators with unrestricted access to the *Competency Manager* feature in System Roles (Manage Features > Competency Manager) can create and manage language bundles for competencies.

Additional Information

Add a Competency Language Bundle

Edit a Competency Language Bundle

Delete a Competency Language Bundle

About Language Bundles

Permissions

Add a Competency Language Bundle

You can add language bundles to competencies to provide the title, description, and the title and description of their proficiency levels, in the user's preferred language, subject to availability.

Administrators with unrestricted access to the *Competency Manager* feature in System Roles (Manage Features > Competency Manager) can add language bundles to competencies.

To add a language bundle

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to add a language bundle to. Its competencies are listed on the right-hand side.
3. Select **Manage Language Bundles** from the competency's action menu. The Manage Language Bundles page opens with a list of the language bundles configured for the competency.
4. Click **+ Add Language Bundle**. The Add Language Bundle dialog opens.
5. Select a language to assign to the competency.
6. Enter the competency title in the new language.
7. Click **Add**. The new language bundle is added to the list.
8. To update the competency's description and the title and description of its proficiency levels, select **Edit** from the competency's action menu. The Edit Bundle Content page opens.
9. Enter a description in the bundle's language.
10. To update a proficiency level, click its **Edit** button.
11. Click **Save**.

Additional Information

About Competency Language Bundles

Edit a Competency Language Bundle

Delete a Competency Language Bundle

Edit a Competency Language Bundle

You can edit a competency language bundle to update the title, description, and the title and description of their proficiency levels, in the user's preferred language, subject to availability. Using the action menu on the Manage Language Bundles page, you can also change the language of competency language bundles, and configure their access permissions.

Administrators with unrestricted access to the *Competency Manager* feature in System Roles (Manage Features > Competency Manager) can edit competency language bundles.

To edit a competency language bundle

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.
2. Select the model containing the competency you want to edit. Its competencies are listed on the right-hand side.
3. Select **Manage Language Bundles** from the competency's action menu. The Manage Language Bundles page opens with a list of the language bundles configured for the competency.
4. Select **Edit** from the language bundle's action menu. The Edit Language Bundle dialog opens.
5. Update the title, description, and the title and description of the proficiency levels, as required.
6. Click **Save**.

Additional Information

About Competency Language Bundles

Add a Competency Language Bundle

Delete a Competency Language Bundle

Permissions

Delete a Competency Language Bundle

You can delete a competency language bundle when you no longer want to display competencies in a particular language.

Administrators with unrestricted access to the *Competency Manager* feature in System Roles (Manage Features > Competency Manager) can delete competency language bundles.

To delete a competency language bundle

1. Go to **Manage Center > Talent > Competency Models**. The Competency Model page opens with a list of the models at the top level of the hierarchy.

2. Select the model containing the competency you want to delete. Its competencies are listed on the right-hand side.

3. Select **Manage Language Bundles** from the competency's action menu. The Manage Language Bundles page opens with a list of the language bundles configured for the competency.

4. Select Delete from the language bundle's action menu.

5. Click **OK** in the Confirmation dialog. The competency language bundle is removed from the list.

Additional Information

About Competency Language Bundles

Add a Competency Language Bundle

Edit a Competency Language Bundle

About Proficiency Levels

Proficiency levels are the scales used to rate learners on competencies. When competencies are awarded to learners, or self-awarded, the proficiency level of can be selected.

Proficiency levels are configured in groups. For example, you might create a proficiency level group with a standardized scale of 1 to 10, for use with multiple competencies. You can also configure competency-specific proficiency groups with level ratings relevant to the corresponding competency.

You can select a proficiency level group as the default group, which is automatically selected when creating competencies.

You can configure access permissions for proficiency level groups to provide access to them for other administrators.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can configure proficiency levels.

To configure proficiency levels, go to **Manage Center > Talent > Proficiency Levels**.

Additional Information

Create a Proficiency Level Group

Edit a Proficiency Level Group

Delete a Proficiency Level Group

Add a Proficiency Level to a Group

Edit a Proficiency Level

Delete a Proficiency Level

Permissions

Create a Proficiency Level Group

You can create a proficiency level group to contain the proficiency level ratings that can be applied to competencies when they are awarded. A competency can be associated with only one proficiency group.

You configure proficiency level groups in the Proficiency Levels page. This page shows proficiency level groups on the left, and the proficiency level ratings for the selected group on the right.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can create proficiency level groups.

To create a proficiency level group

1. Go to **Manage Center > Talent > Proficiency Levels**. The Proficiency Levels page opens.
2. Click the **Add catalog** icon. A blank proficiency level is added to the bottom of the list.
3. Enter a name for the new proficiency level and press RETURN.

Additional Information

About Proficiency Levels

Add a Proficiency Level to a Group

Edit a Proficiency Level Group

Delete a Proficiency Level Group

Edit a Proficiency Level Group

When you edit a proficiency level group, you can rename it, mark it as the default group when creating competencies, and configure its access permissions. The default group is indicated by a red mark on its icon.

> ⓘ   Setting a proficiency level group as default requires unrestricted permission for both the new and existing proficiency level groups.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can edit proficiency level groups.

To edit a proficiency level group

1. Go to **Manage Center > Talent > Proficiency Levels**. The Proficiency Levels page opens.
2. Select the proficiency level group you want to edit from the list.
3. Click the action menu above the list and select an option from the drop-down list.

Additional Information

About Proficiency Levels

Permissions

Delete a Proficiency Level Group

You can delete a proficiency level group only if it is not used by any competencies and it is not set as the default group.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can delete proficiency level groups.

To edit a proficiency level group

1. Go to **Manage Center > Talent > Proficiency Levels**. The Proficiency Levels page opens.
2. Select the proficiency level group you want to delete from the list.
3. Click the **Delete catalog** icon and then click **OK** in the confirmation dialog.

   The proficiency level group is deleted.

Additional Information

About Proficiency Levels

Edit a Proficiency Level Group

Add a Proficiency Level to a Group

Proficiency levels provide a mechanism for rating learners' competencies. In the Proficiency Levels page, they are ordered lowest to highest from top to bottom in the list. When you add a new proficiency level, it is added to the bottom of the list. This means proficiency levels are created in reverse order—highest to lowest—by default. You can re-order the proficiencies by clicking anywhere in a row and dragging it up or down as required.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can add proficiency levels to groups.

To add a proficiency level to a group

1. Go to **Manage Center > Talent > Proficiency Levels**. The Proficiency Levels page opens.
2. Select the proficiency level group you want add a proficiency level to.
3. Click the **Add catalog** icon at the top of the proficiency levels list. A new blank proficiency level row is added to the top of the list.
4. Enter a level code, level title and description.
5. To add another proficiency level, repeat steps 3 and 4.
6. Click **Save All**.
7. Click and drag proficiency levels to re-order them, if required.

Additional Information

About Proficiency Levels

Edit a Proficiency Level

Delete a Proficiency Level

Edit a Proficiency Level

You can edit a proficiency level to change its code, title and description.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can edit proficiency levels.

To edit a proficiency level

1. Go to **Manage Center > Talent > Proficiency Levels**. The Proficiency Levels page opens.
2. Select the proficiency level group you want edit a proficiency level for.
3. Select **Edit** from the action menu of the proficiency level you want to edit. The code, title and description fields become editable.
4. Update the code, title and description as required.
5. Click **Save All**.

Additional Information

About Proficiency Levels

Add a Proficiency Level to a Group

Delete a Proficiency Level

Delete a Proficiency Level

You can delete a proficiency level only if the proficiency level group it belongs to is not being used by a competency.

Administrators with unrestricted access to the *Proficiency Levels feature* in System Roles (Manage Features > Competency Manager Features) can delete proficiency levels.

To delete a proficiency level

1. Go to **Manage Center > Talent > Proficiency Levels**. The Proficiency Levels page opens.
2. Select the proficiency level group you want delete a proficiency level from.
3. Select **Delete** from the action menu of the proficiency level you want to delete.
4. Click **OK** in the confirmation dialog. The proficiency level is deleted.

Additional Information

About Proficiency Levels

Edit a Proficiency Level

About the Competency Data Loader

With the Competency Data Loader, you can:

- Import competencies in bulk and add them to competency models

- Update and delete competencies in bulk

- Assign their proficiency level group

- Assign and de-assign learning modules required for competencies

- Update competencies' recognition and revocation policies

To get started, you can download a CSV file template and populate the required fields offline in a spreadsheet application or text editor. The LMS provides information to help you fill in the CSV template, such as the expected values for each field. For more information, see Competency Data Loader Field Reference.

When creating competencies, the mandatory fields are ReferenceCode and Title.

When updating or deleting competencies, the mandatory field is ReferenceCode.

Administrators with unrestricted access to the *Competency Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import competencies.

To import competencies, go to **Manage Center > Talent > Competency Data Loader**.

Preparing CSV Files for Import

To prepare a user CSV file for import, you can download a template CSV file from the Competency Data Loader page and populate the fields as required. Alternatively, you can run report *R420 – Competency Export in CSV Data Uploader Format* to export existing competencies for editing outside of the LMS.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

> ⚠️ If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (" "). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Additional Information

Import Competencies

Competency Data Loader Field Reference

About Competencies

About the Competency Expiry Data Loader

Import Competencies

You can create, update and delete competencies via the Competency Data Loader. You must first populate in a comma—or semicolon—separated values (CSV) file a row for each competency. For more information, see Competency Data Loader Field Reference.

Administrators with unrestricted access to the *Competency Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import competencies.

To import competencies

1. Go to **Manage Center > Talent > Competency Data Loader**. The Competency Data Loader page opens and lists your previous imports, if any.

2. To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.

3. If required, download the CSV file template and enter the certification award information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

4. Click **+ Import CSV file**.

5. Click **Choose File** to select the CSV file to upload.

6. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

7. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

8. To create new competency models and sub-models when importing competencies, select the **Create new catalogs found in CSV file** check box.

9. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

10. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

11. If any records failed to import, you can go back to the Competency Data Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

Competency Data Loader Field Reference

About the Competency Data Loader

About Competencies

Competency Data Loader Field Reference

Use the reference table below to help you correctly format the competencies data you want to import via the Competency Data Loader.

Administrators with unrestricted access to the *Competency Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import competencies.

To import competencies, go to **Manage Center > Talent > Competency Data Loader**.

Assigning and De-assigning Learning Modules to and from Existing Competencies

You must populate a row of values for each learning module you want to assign to or de-assign from a competency.

To assign a learning module to a competency, set Action to *A*, provide the ReferenceCode, the LearningModuleID and the appropriate settings for that module. You can only assign learning modules in the LMS catalog.

To de-assign a learning module from a competency, set Action to *D*, provide the ReferenceCode and the LearningModuleID.

Table: Competency Data Loader Field Reference

Field	Content (Corresponding Field in the Competency Page)	Data Handling
Action		*A* for Add, *U* for Update, *D* for Delete.
ReferenceCode	Reference Code	A unique reference code (maximum 85 characters). This field is mandatory.
Title	Title	Any text (maximum 85 characters). This field is mandatory when the Action is *A.*

Model	Model	Any text (maximum 50 characters). To assign the competency to a sub-model, enter the full path to the sub-model and separate levels with the / character. For example, *Model/Sub-Model/Sub-Model.*You can create new models and sub-models. If no model is specified, it defaults to General. ⓘ The General model can be deleted, but it must exist if no model is specified in the data loader. If it has been deleted, the import fails.
Description	Description	Any text (maximum 6,000 characters). Enter *NONE* to clear.
Language	Language	The ISO code for the assigned language. For example, en, fr, fr_CA, es_ES. If no language is specified, it defaults to multi-language.
Active	Active	Y for Yes (option checked) or N for No (option unchecked).
ProficiencyLevelGroup	Level Group	An Existing Proficiency Level Group Name. If no proficiency level group is specified, the default proficiency level group is applied.

Training	Training	Y for Yes (option checked) or N for No (option unchecked).
TrainingAllLearningModules Completed	This competency requires that ALL of the assigned learning modules be completed.	Y for Yes (option checked) or N for No (option unchecked).
TrainingTargetLevel	The target level acquired is	An existing Proficiency Level Code.
TrainingNumberOfCompleted LearningModules	of the listed learning modules (including mandatory)	Any number no be greater than the number of assigned learning modules.
DeployAssessment	Deploy Assessment	Y for Yes (option checked) or N for No (option unchecked).
AdHocSelfAssessment	Ad Hoc Self-Assessment	Y for Yes (option checked) or N for No (option unchecked).
AdHocReviewerAssessment	Ad Hoc Reviewer Assessment	Y for Yes (option checked) or N for No (option unchecked).
AdHocAssessmentWaiting Period	Minimum x Day(s) of Waiting Period for Re-Ad-Hoc Assessment	Any number.
AdHocAssessmentWaiting PeriodUnit	Minimum x Day(s) of Waiting Period for Re-Ad-Hoc Assessment	D for day(s) or Y for year(s). If no value is specified, D is used.
AdHocAssessmentValidFor	Ad-hoc Assessment Expiry	N for Does not expire, R for Require assessor to specify, or Y for Expires from date of award.
AdHocAssessmentValidFor Number	Ad hoc assessment valid for	Any number.

AdHocAssessmentValidForUnit	Ad hoc assessment valid for	D for day(s) or Y for year(s). If no value is specified, D is used.
LearningModuleID	Learning ID	Must be a cataloged learning module ID (maximum 85 characters).
LearningModuleMandatory	Mandatory (for Training)	Y for Yes (option checked) or N for No (option unchecked).
LearningModuleRevision	Revision	*Any* or *Effective* (maximum 10 characters). If no value is specified, Any is used.
LearningModuleValidFor	Valid for	Any number (maximum 85 characters). Enter *NONE* to clear.
LearningModuleValidForUnit	Valid for	D for day(s) or Y for year(s). If no value is specified, D is used.
LearningModuleTargetLevel	Target Level	An existing Proficiency Level Code.
GracePeriod	After a new revision of a mandatory learning module requiring the effective revision to be published, allow a grace period of x Day(s) before revoking the competency	Y for Yes (option checked) or N for No (option unchecked).

GracePeriodNumber	After a new revision of a mandatory learning module requiring the effective revision to be published, allow a grace period of x Day(s) before revoking the competency	Any number.
GracePeriodUnit	After a new revision of a mandatory learning module requiring the effective revision to be published, allow a grace period of x Day(s) before revoking the competency	D for day(s) or Y for year(s). If no value is specified, D is used.
RenewalPeriod	For mandatory modules, apply a renewal period and automatically re-enroll learners x Day(s) prior to module expiration	Y for Yes (option checked) or N for No (option unchecked).
RenewalPeriodNumber	For mandatory modules, apply a renewal period and automatically re-enroll learners x Day(s) prior to module expiration	Any number.

RenewalPeriodUnit	For mandatory modules, apply a renewal period and automatically re-enroll learners x Day(s) prior to module expiration	D for day(s) or Y for year(s). If no value is specified, D is used.
ApplyValidityPeriodFrom	During the renewal period, on completion of the learning module apply the validity period from	1 or 2. 1 = The date of completion of the learning module. 2 = The previous module expiration date. If no value is specified, 1 is used.
ReminderDaysBefore Expiration	Send reminder x day(s) before learning module expires.	Any number. Enter *NONE* to clear.
SendNotification	Send notification when this competency has entered the grace period or has been revoked.	Y for Yes (option checked) or N for No (option unchecked).

Additional Information

About the Competency Data Loader

Import Competencies

About the Competency Expiry Data Loader

You can use the Competency Expiry Data Loader to update in bulk the expiry date of competencies dependent on course completion.

To get started, you can download a CSV file template and populate the required fields offline in a spreadsheet application or text editor. The LMS provides information to help you fill in the CSV template, such as the expected values for each field. For more information, see Competency Expiry Data Loader Field Reference.

All fields in the Competency Expiry Data Loader CSV file are mandatory.

Administrators with unrestricted access to the *Competency Expiry Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import competencies.

To import competencies, go to **Manage Center > Talent > Competency Expiry Data Loader**.

Preparing CSV Files for Import

To prepare a user CSV file for import, you can download a template CSV file from the Competency Expiry Data Loader page and populate the fields as required. Alternatively, you can run report *R135 – Competency Expiry Export in CSV Loader Format (by Organization)* or *R136 – Competency Expiry Export in CSV Loader Format (by User)* to export existing competency expiry data for editing outside of the LMS.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

> ⚠️ If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (*" "*). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Additional Information

Import Competency Expiry Data

Competency Expiry Data Loader Field Reference

About Competencies

Import Competency Expiry Data

You can create, update and delete competencies via the Competency Expiry Data Loader. You must first populate in a comma—or semicolon—separated values (CSV) file a row for each competency. For more information, see Competency Expiry Data Loader Field Reference.

Administrators with unrestricted access to the *Competency Expiry Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import competencies.

To import competency expiry data

1. Go to **Manage Center > Talent > Competency Expiry Data Loader**. The Competency Expiry Data Loader page opens and lists your previous imports, if any.

2. To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.

3. If required, download the CSV file template and enter the certification award information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

4. Click **+ Import CSV file**.

5. Click **Choose File** to select the CSV file to upload.

6. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

7. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

10. If any records failed to import, you can go back to the Competency Expiry Data Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

Competency Expiry Data Loader Field Reference

About the Competency Expiry Data Loader

About Competencies

Competency Expiry Data Loader Field Reference

Use the reference table below to help you correctly format the competency expiry data you want to import via the Competency Expiry Data Loader.

Administrators with unrestricted access to the *Competency Expiry Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import competencies.

To import competencies, go to **Manage Center > Talent > Competency Data Expiry Loader**.

Table: Competency Data Loader Field Reference

Field	Content	Data Handling
UserID	User ID	The User ID of the learner with the competency.
CompetencyCode	Reference Code	This is the Reference Code of learner's competency you want to update the expiry date for.
LearningID	Learning ID	Module ID of learning module in the specified competency you want to update the expiry date for. If the learner has more than one module expiry date recorded against the specified competency, this row in the CSV file is ignored.
Expiry	Expiry	One of: • R(*dd*D) • R(*y*Y) • F(yyyy-MM-dd HH:mm:ss) Where *dd* can be replaced by the number of days (up to 9999) after the module completion or ad hoc assessment for expiry, *y* can be replaced by the number of years (max 100) after module completion or ad hoc assessment for expiry, and yyyy-MM-dd HH:mm:ss can be replaced by a fixed date for expiry in the yyyy-MM-dd HH:mm:ss format.

| AssignmentID | Assignment ID. This is mandatory only if the learner has more than one job assigment. | The Assignment ID of the specified User ID. |

Additional Information

[About the Competency Expiry Data Loader](#)

[Import Competency Expiry Data](#)

[About the Competency Data Loader](#)

About Competency Groups

You can create groups of competencies for convenient assignment to job profiles. For example, if you frequently reference the same competencies when defining management-related job profiles, you can create a competency group called Management, and select the group, rather than individual competencies, when defining management job profiles. You can assign a certification to a competency group so that when employees have acquired all of the competencies in a group, they are awarded the corresponding certification.

You configure competency groups in the Competency Group Editor, from which you can also see user rankings for competencies and run competency reports.

To use competency groups, the *Enable competency groups* system configuration setting must be enabled.

Visibility of competency groups is determined by the competency model in which they are configured.

Administrators with unrestricted access to the *Competency Group Editor* feature in System Roles (Manage Features > Competency Manager Features) can create, edit and delete competency groups and map them to job profiles.

To configure competency groups, go to **Manage Center > Talent > Competency Models** and click **Groups**.

Additional Information

Create a Competency Group

Edit a Competency Group

Delete a Competency Group

About Job Profiles

Create a Competency Group

You can create a competency group to more easily assign competencies to a job profile.

Administrators with unrestricted access to the *Competency Group Editor* feature in System Roles (Manage Features > Competency Manager Features) can create competency groups.

To create a competency group

1. Go to **Manage Center > Talent > Competency Models**.
2. Click **Groups**. The Competency Group Editor opens.
3. Click the **New** icon on the Competency Group Editor toolbar. The Create/Edit page opens in the editor.
4. Click **Create competency group**. The Create competency group page opens in the editor.
5. Enter a reference code and name for the group.
6. Select from the Competency Catalog drop-down list the competency model to assign the competency group to.
7. Enter a description for the group, if required.
8. Select the **Active** check box to allow the group to be assigned to a job profile.
9. To award a certification to learners who acquire all of the competencies in the group, click the **browse** icon to select the certification.
10. Click the **Save** icon on the Competency Group Editor toolbar. The group is saved and you can now select the competencies to include in the group.
11. Click **Add competencies** to select the competencies to add to the group. You can select multiple competencies.
12. Click the **Save** icon on the Competency Group Editor toolbar. The competencies in the group are listed at the bottom of the page.

Additional Information

About Competency Groups

Edit a Competency Group

Delete a Competency Group

Edit a Competency Group

When you can edit a competency group, you can:

- Update its basic details

- Assign it to a different competency model

- Add or remove its competencies

- Activate or deactivate it

Administrators with unrestricted access to the *Competency Group Editor* feature in System Roles (Manage Features > Competency Manager Features) can edit competency groups.

To edit a competency group

1. Go to **Manage Center > Talent > Competency Models**.
2. Click **Groups**. The Competency Group Editor opens.
3. To open the group you want to edit, click the **Search** icon on the Competency Group Editor toolbar and search for it by name or reference code. Alternatively, select the competency model containing group you want to edit from the Competency catalogs drop-down list. The groups assigned to the selected competency model are listed under the drop-down list. Click the group name to open it in the editor.
4. Update the group properties as required.
5. Click the **Save** icon on the Competency Group Editor toolbar.

Additional Information

About Competency Groups

Create a Competency Group

Delete a Competency Group

Delete a Competency Group

You can delete competency groups in the Competency Group Editor. Deleting a competency group does not delete the competencies in the associated competency model or remove them from job profiles to which the group was previously added.

Administrators with unrestricted access to the *Competency Group Editor* feature in System Roles (Manage Features > Competency Manager Features) can delete competency groups.

To delete a competency group

1. Go to **Manage Center > Talent > Competency Models**.
2. Click **Groups**. The Competency Group Editor opens.
3. To open the group you want to delete, click the **Search** icon on the Competency Group Editor toolbar and search for it by name or reference code. Alternatively, select the competency model containing group you want to delete from the Competency catalogs drop-down list. The groups assigned to the selected competency model are listed under the drop-down list. Click the group name to open it in the editor.
4. Click the **Delete** icon on the Competency Group Editor toolbar.
5. Click **OK** in the confirmation dialog. The group is deleted.

Additional Information

About Competency Groups

Create a Competency Group

Edit a Competency Group

About SFIA Libraries

The Skills Framework for the Information Age (SFIA) provides a common, standardized library of definitions for skills and competencies that can be used by the LMS to evaluate employees.

You can import libraries defined in the SFIA up to version 5. The libraries are structured in categories and subcategories, with each subcategory containing one or more competencies. You can add individual competencies or an entire category or subcategory to your competency models.

The competencies in SFIA libraries include proficiency levels with detailed descriptions, which you can edit when the competencies have been imported into your competency models.

Administrators with unrestricted access to the *Competency Library* feature in System Roles (Manage Features > Competency Manager Features) can import and delete SFIA libraries, and add competencies to competency models.

To manage SFIA libraries, go to **Manage Center > Talent > Library**.

Additional Information

Import an SFIA Library

Add SFIA Library Competencies to a Competency Model

Delete an SFIA Library, Category or its Competencies

Import an SFIA Library

You can import Skills Framework for the Information Age (SFIA) libraries to add their competencies and proficiency levels to your competency models. When you have imported an SFIA library, you can expand its categories and subcategories to see their competencies. You can sort the competencies list in alphabetical or reverse alphabetical order by clicking the *COMPETENCY NAME* heading.

Administrators with unrestricted access to the *Competency Library* feature in System Roles (Manage Features > Competency Manager Features) can import SFIA libraries.

To import an SFIA library

1. Go to **Manage Center > Talent > Library**. The Library page opens with a list of any previously imported libraries.
2. Click the **Import/add competency library** icon. The Import Library dialog opens.
3. Enter a name for the library.
4. Click **Choose File** and select the library file to import from the file browser.
5. Click **Import**. The library is added to the list.

Additional Information

About SFIA Libraries

Add SFIA Library Competencies to a Competency Model

Delete an SFIA Library, Category or its Competencies

Add SFIA Library Competencies to a Competency Model

You can add competencies from imported SFIA libraries to your competency models individually or in bulk. You can add competencies to a model from multiple libraries, and add competencies from a library to multiple models. You must import an SFIA library before you can add its competencies to a model.

Competencies that have been added to a model from a library remain in the model if the library competency is deleted.

Administrators with unrestricted access to the *Competency Library* feature in System Roles (Manage Features > Competency Manager Features) can add SFIA library competencies to a competency model.

To add a category or subcategory of SFIA library competencies to a competency model

1. Go to **Manage Center > Talent > Library**. The Library page opens with a list of previously imported libraries.
2. Expand the library hierarchy and select the category or subcategory.
3. Select **Add category to model** from the action menu. The Add category to model dialog opens.
4. Expand the model hierarchy and select the competency model to add the category to.
5. Click **Add to model**. The category, its subcategories (if any) and competencies are added to the competency model.

To add one or more SFIA library competencies to a competency model

1. Go to **Manage Center > Talent > Library**. The Library page opens with a list of previously imported libraries.
2. Expand the library hierarchy and select the category or subcategory containing the competencies you want to add. The competencies are listed on the right-hand side.
3. Select the check boxes of the competencies you want to add to a competency model.
4. Select **Add to model** from the Bulk Action drop-down list. The **Add competency to model** dialog opens.
5. Expand the model hierarchy and select the competency model to add the category to.
6. Click **Add to model**. The competencies are added to the selected model.

Additional Information

About SFIA Libraries

Import an SFIA Library

Delete an SFIA Library, Category or its Competencies

Delete an SFIA Library, Category or its Competencies

You can delete imported SFIA libraries, their categories and subcategories, and also selected competencies if no longer required. Competencies that have been added to a model from a library remain in the model if the library competency is deleted.

Administrators with unrestricted access to the *Competency Library* feature in System Roles (Manage Features > Competency Manager Features) can delete SFIA libraries, their categories, subcategories and competencies.

To delete an SFIA library category or subcategory and associated competencies

1. Go to **Manage Center > Talent > Library**. The Library page opens with a list of imported libraries.

2. Expand the library hierarchy and select the category or subcategory you want to delete.

3. Select the **Delete competency library** icon. The Delete category dialog opens.

4. Click **OK**. The category and its subcategories (if any) and associated competencies are deleted from the library.

To delete one or more competencies from an SFIA library category or subcategory

1. Go to **Manage Center > Talent > Library**. The Library page opens with a list of imported libraries.

2. Expand the library hierarchy and select the category or subcategory from which you want to delete competencies. The competencies are listed on the right-hand side.

3. Select the check boxes of the competencies you want to delete.

4. Select **Delete** from the Bulk Action drop-down list. The Delete competency dialog opens.

5. Click **OK**. The selected competencies are deleted from the category or subcategory.

Additional Information

About SFIA Libraries

Import an SFIA Library

Add SFIA Library Competencies to a Competency Model

About Job Profiles

A job profile is a set of competencies that describe a learner's overall training needs, based on the expected knowledge requirements of a particular job. For example, a job profile for a Branch Manager might specify competencies for Time Management, People Management and Accounting. Learners can have more than one job profile.

Learners who are assigned a job profile will see any training requirements for the job profile's associated competencies in their learning path.

Job profiles can be assigned to learners individually or in groups by a reviewer (for example, their direct appraiser or manager) in the Career Development Center or automatically by the LMS, based on learners' completed courses. You can also review, assign and de-assign job profiles in the Manage Center. Learners cannot assign job profiles to themselves.

You define job profiles within *Job Profile Catalogs*, which are used to organize job profiles. For example, you could organize all your job profiles for different roles within human resources in a catalog called HR. You can configure access permissions for job profile catalogs to specify which users can assign their job profiles or edit them. You can also import, update and delete job profiles via the Job Profile Data Loader.

You can set the status of job profiles to be active or inactive. Only activated job profiles can be assigned to learners or included in automated or group assignment. You can filter the list of job profiles in catalogs by their status. The System Configuration setting, *Automatic De-Assign of Job Profiles*, when enabled, automatically unassigns job profiles from users that no longer meet the criteria for the auto-assign targets. (This uses the settings in the Auto-Assign Console for criteria scan during login and offline-bulk scanning.)

Assignment types can be used to label the relationship between a user and a job profile. You can use assignment types in compliance reporting and when reviewing users' training progress through their learning path. You associate assignment types with users' job profiles by exporting job profile assignments to a CSV file, adding the required assignment types, and then importing the assignment types CSV file in the Job Profile Assignment Data Loader.

If the *Enable job profiles* system configuration setting is enabled, you can also create groups of job profiles in the Competency Group Editor and assign a certification to the group. A certification assigned to the job profile group will be automatically awarded to all users who have been awarded all the competencies associated with all the job profiles in the group.

For information about reviewing, assigning and de-assigning learners' job profiles in the Career Development Center, see the Team Review Guide.

Job profiles are available with the Learning and legacy Performance licenses only. Job profile groups are available only on legacy contracts with the Performance license.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can configure the job profile features described here.

Additional Information

About Job Profile Catalogs

Create a Job Profile

Review Users' Job Profiles in the Manage Center

About Auto-assigning Learners to Job Profiles

About the Job Profile Data Loader

About Ranking Users by Job Profile Competencies

About the Career Development Center

About Job Profile Assignment Types

Create a Job Profile

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can create a job profile.

To create a job profile

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog in which to create a new job profile.
3. Click the **+ Job Profile**. The new job profile's Details tab opens.
4. Enter the details for the new job profile.
5. Click **Save**. The job profile is added to the list for the selected catalog.

Additional Information

Job Profile Details Field Reference

Group Assign a Job Profile

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Job Profile Details Field Reference

The Job Profile Details tab is divided into the following sections:

- Job Profile Details

- Required Competencies

- Notification Settings

The system default notification email templates can be selected in the Competency Manager category in System Configuration (**Manage Center > System > System Configuration**).

Use the tables below to help you create or edit a job profile.

Table: Job Profile Details

Field	Description
Reference Code	Enter a unique reference code for the job profile, up to a maximum of 85 characters. This field is mandatory.
Name	Enter a name for the job profile up to a maximum of 85 characters. This field is mandatory.
Job Profile Catalog	Select the catalog in which to save the job profile.
Owner	If your organization appoints an LMS administrator to be responsible for the job profile, click the **browse** icon to select the user. The job profile owner can then receive email notifications when the job profile is assigned or de-assigned.
Description	Enter a description for the job profile up to 1,000 characters.
Language	The default value of Multi-language means that the job profile is displayed in the same language regardless of users' preferred language setting in their profile. If your LMS has licensed additional languages, you can select a language bundle from the drop-down list.
Active	Select this check box to activate the job profile. Only activated job profiles can be assigned to learners or included in automated or group assignment.
Allows self-assignment	Select this check box to enable learners to assign themselves the job profile in the Career Development Center (CDC) or Career Center.

Allows reviewer assignment	Select this check box to enable reviewers to award the job profile to the learner when reviewing in the CDC.
Start Date/End Date	The addition of the Start Date and End Date fields will function as the window in which the Job Profile can be automatically or manually assigned to users.

Table: Required Competencies

Field	Description
Search competencies	Click the **Search** icon to open a paginated drop-down list of all competencies visible to you. Alternatively, start typing some or all of the competency reference code or title and the LMS populate the drop-down list with matching results. Click the **Next** and **Previous** icons to page through the results. If all of the competencies in the list are not required for learners to be awarded the job profile (see below), you can select the **Mandatory** check box to make specific competencies in the list a mandatory requirement for the job profile. For each competency in the list, you can select the required proficiency level.
To complete this job profile, complete	Select **All Listed Competencies** to make it a requirement that learners must have been awarded all of the competencies listed above before they can be assigned the job profile. Alternatively, select the number of competencies from the drop-down list that learners must have been awarded so they can be assigned the job profile.

For the email notification settings:

- If no system default template for the email notification has been created, no email is sent.

- You can browse for an email template in the Email Template Editor, or choose to not send an email.

Table: Notification Settings

Field	Description
Job Profile Assignment Notification for Assignee E-mail	Select one of the options for sending notifications to the assignee when a job profile is assigned to them.
Job Profile Assignment Notification for Direct Appraisers E-mail	Select one of the options for sending notifications to the assignee's direct appraiser when a job profile is assigned.
Job Profile Assignment Notification for Job Profile Owner E-mail	Select one of the options for sending notifications to the job profile owner when a job profile is assigned to a learner.
Job Profile De-Assignment Notification for Assignee E-mail	Select one of the options for sending notifications to the learner when a job profile is de-assigned from them.
Job Profile De-Assignment Notification for Direct Appraisers E-mail	Select one of the options for sending notifications to the learner's direct appraiser when a job profile is de-assigned from the learner.
Job Profile De-Assignment Notification for Job Profile Owner E-mail	Select one of the options for sending notifications to the job profile owner when a job profile is de-assigned from a learner.

Additional Information

About Job Profiles

Create a Job Profile

Clone a Job Profile

Edit a Job Profile

Clone a Job Profile

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can clone job profiles.

To clone a job profile

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog containing the job profile you want to clone. Its job profiles are listed on the right-hand side.
3. Select **Clone** from the action menu of the job profile you want to clone. The new job profile's Details tab opens.
4. Enter the details for the new job profile.
5. Click **Save**. The job profile is added to the list for the selected catalog.

Additional Information

Job Profile Details Field Reference

Edit a Job Profile

Delete a Job Profile

About Job Profiles

Edit a Job Profile

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can edit job profiles.

To edit a job profile

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog containing the job profile you want to edit. Its job profiles are listed on the right-hand side.
3. Select **Edit** from the action menu of the job profile you want to edit. The job profile's Details tab opens.
4. Edit the details as required.
5. Click **Save**.

Additional Information

Job Profile Details Field Reference

Clone a Job Profile

Delete a Job Profile

About Job Profiles

Review Users' Job Profiles in the Manage Center

Group Assign a Job Profile

About Auto-assigning Learners to Job Profiles

Configure Job Profile Auto-assignment Criteria

Delete a Job Profile

Deleting a job profile removes it from all learners it is currently assigned to.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can delete competencies.

To delete a job profile

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog containing the job profile you want to delete. Its job profiles are listed on the right-hand side.
3. Select Delete from the action menu of the job profile you want to delete.
4. Click **OK** to confirm the deletion.

Additional Information

About Job Profiles

Review Users' Job Profiles in the Manage Center

User Search

You can see a list of users with a particular competency or job description in the User Search page.

Administrators with read-only access to the *User Search* feature in System Roles (Manage Features > Competency Manager Features) can search for users by job profile or competency.

To search for users

1. Go to **Manage Center > Talent > User Search**. The User Search page opens.
2. Select either **Job Profiles** or **Competencies** from the drop-down list.
3. Enter some or all of the name of the job profile or competency.
4. Click **Search**. Any users with a matching job profile or competency are listed in the table.
5. To filter the list on any of the columns, start typing the filter text in the Filter field.

Additional Information

About Competencies

About Job Profiles

Review Users' Job Profiles in the Manage Center

You can view a list of learners who have been assigned a job profile in the User Review tab for the job profile. You can also de-assign the job profile from the learners individually or in bulk.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can review users' job profiles in the Manage Center.

To review users' job profiles in the Manage Center

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog containing the job profile you want to review. Its job profiles are listed on the right-hand side.
3. Select **View Assignments** from the action menu of the job profile you want to review. The job profile's User Review page opens.
4. Select the filter criteria for the user list, if required, and click **Filter**. The users with the job profile assigned are listed below.
5. To see all of the job profiles assigned to a user, the required competencies and learning modules, click the use's name.
6. To unassign the job profile from a user, select **De-assign Job Profile** from the user's action menu.
7. To unassign the job profile from multiple users, select the users' check boxes and then select **De-assign Job Profile** from the Bulk Action drop-down list.

Additional Information

Group Assign a Job Profile

Configure Job Profile Auto-assignment Criteria

Configure Job Profile Auto-assignment Scans

About Job Profiles

Group Assign a Job Profile

You can assign a job profile to one or more users in the job profile's Group Assign page.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can group assign job profiles.

To group assign a job profile

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog containing the job profile you want to assign to a group of users. Its job profiles are listed on the right-hand side.
3. Select Edit from the action menu of the job profile. The job profile's Details tab opens.
4. Click **Group Assign**. The Group Assign page opens.
5. Start typing the user ID or name of the users you want to in the group assignment, or click the **browse** icon to open the User Selector, where you can search for users.
6. Repeat step 5 until you have selected all of the users.
7. Click **Save**. The Group Assignment page opens with a list of the users who have been assigned the job profile.

Additional Information

Review Users' Job Profiles in the Manage Center

About Job Profiles

About Auto-assigning Learners to Job Profiles

You can configure the scan intervals for automatically assigning job profiles to learners in the Profile Auto-Assign Console. This specifies when their user profiles, competencies and transcript records are checked to see if they match the auto-assignment criteria for any job profiles; users who match are assigned the job profile. You can also disable the auto-assignment checks for job profiles. Before job profiles can be auto-assigned to users, you must configure their auto-assign criteria in the job profiles' Auto-assign page.

You can scan a specific user between auto-assign processing intervals by updating their profile in the User Editor. Similarly, you can scan for a specific job profile by updating its auto-assign targets in the job profile's Auto-assign page. Both of these actions reset the interval timers for auto-assignment scans.

You can configure the LMS to run auto-assignment in bulk for users who are logged out. Offline assignment processing is disabled by default as it can impact system performance, depending on the number of active user accounts in the LMS.

In the Auto-Assign User List tab in the console, you can view a list of users who were assigned job profiles between two dates. The job profiles that were automatically assigned are indicated in the *Auto* column.

> ⓘ Once a job profile is automatically assigned to a user, it will not be automatically unassigned if the user no longer meets the criteria. It will have to be manually removed by an administrator with appropriate permissions.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can configure job profile auto-assignment criteria and scanning intervals.

To configure the scan intervals for automatically assigning job profiles, go to **Manage Center > Talent > Job Profiles** and click **Auto-Assign Console**.

Additional Information

Configure Job Profile Auto-assignment Scans

Configure Job Profile Auto-assignment Criteria

About Job Profiles

Configure Job Profile Auto-assignment Criteria

You can configure the criteria for automatically assigning a job profile to users in the job profile's Auto-assign page. You then configure the auto-assignment scan interval in the Profile Auto-Assign Console to specify when auto-assignment processing happens.

You can select users based on any combination of the following properties:

- User group, role, logical domain or organization

- Completed courses

- Employment information

- Job profiles and competencies

- User attributes

- Organization attributes

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can configure job profile auto-assignment criteria.

To configure job profile auto-assignment criteria

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.

2. Select the catalog containing the job profile you want to configure auto-assignment criteria for. Its job profiles are listed on the right-hand side.

3. Select **Edit** from the action menu of the job profile. The job profile's Details tab opens.

4. Click **Auto-assign**. The Auto-assign page opens.

5. Expand the criteria headings (for example, Users/Organization/Role) to select the criteria used to determine which learners can be auto-assigned the job profile.

6. Click **Set Auto-Assign Targets**.

7. Click **OK** to confirm.

Additional Information

Configure Job Profile Auto-assignment Scans

About Auto-assigning Learners to Job Profiles

About Job Profiles

Configure Job Profile Auto-assignment Scans

Before job profiles can be auto-assigned to users, you must configure their auto-assign criteria in the job profiles' Auto-assign page.

Administrators with unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features) can configure job profile auto-assignment scanning intervals.

To configure the scan intervals for automatically assigning job profiles

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens.
2. Click **Auto-Assign Console**. The Profile Auto-Assign Console page opens.
3. Select a scan interval setting from the Criteria Scan Interval drop-down list.
4. If you selected *Initiate New Check at Every Login*, enter the number of seconds to wait until job profiles are assigned to users after they login.
5. To enable auto-assignment processing for logged-out users, select the scan interval from the Offline Bulk Auto-Assign drop-down list.
6. Click **Execute** to initialize the scan intervals.

Additional Information

About Auto-assigning Learners to Job Profiles

Configure Job Profile Auto-assignment Criteria

About Job Profiles

About Ranking Users by Job Profile Competencies

You can search for users who who have been awarded one or more of the competencies assigned to a particular job profile, and rank them according to how closely they satisfy the competency requirements for the job profile. The user ranking search is based on competencies only and therefore includes learners who may or may not already have been assigned the job profile.

Users are ranked by the percentage of required competencies they have been awarded.

You access the User Ranking search from the Competency Group Editor, and you can drill down to the users' competencies in the Career Development Center, therefore your system role must have at least read-only access to the following features in System Roles:

- Competency Group Editor (Manage Features > Competency Manager Features).

- Career Development Center (Review features > Review Submenu Features)

- Career Center Summary (Review features > Review Submenu Features)

- Competencies (Review features > Review Submenu Features)

- Job Profiles (Review features > Review Submenu Features)

You must also have read-only access to the relevant job profile catalogs containing the job profiles you want to rank users for.

To rank users by job profile competencies, go to **Manage Center > Talent > Competency Models** and click **Groups**.

Additional Information

Rank Users by Job Profile Competencies

Rank Users by Job Profile Competencies

You can search for users who who have been awarded one or more of the competencies assigned to a particular job profile, and rank them according to how closely they satisfy the competency requirements for the job profile.

To rank users by job profile competencies

1. Go to **Manage Center > Talent > Competency Models**. The Competency Models page opens.

2. Click **Groups**. The Competency Group Editor opens.

3. Click the **User Ranking** icon on the Competency Group Editor toolbar. The User Ranking page opens in the editor.

4. Select a job profile from the drop-down list. Users who have at least one of the required competencies for the job profile are listed and ranked by percentage of the required competencies they have been awarded.

5. Optionally, click a user's name to open their Career Summary page in the Career Development Center.

Additional Information

About Ranking Users by Job Profile Competencies

About Job Profile Catalogs

Job profile catalogs are containers for organizing your job profiles. For example, you could a catalog for human resources job profiles, containing the profiles for different roles within human resources. You can configure access permissions for job profile catalogs to specify which users can assign their job profiles or edit them.

You configure job profile catalogs on the Job Profiles page. From the Catalogs *Tools* action menu on the Job Profiles page, you can select some or all of the following options, depending on your access permissions for the selected model:

- Rename the selected job profile catalog

- Configure access permissions for the selected job profile catalog to specify which administrators can view or edit them its job profiles, and assign or de-assign them.

- Open the Job Profile Data Loader, where you can import job profiles from a comma-separated values (CSV) formatted file.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can configure job profile catalogs.

Additional Information

Create a Job Profile Catalog

Edit a Job Profile Catalog

Delete a Job Profile Catalog

About the Job Profile Data Loader

About Job Profiles

Create a Job Profile

Permissions

Create a Job Profile Catalog

You can create a job profile catalog to contain one or more related job profiles. To specify which learners can be assigned the job profiles you add to it, you configure access permissions for the catalog instead of configuring them for each job profile in the catalog individually.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can create job profile catalogs.

To create a job profile catalog

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the parent catalog under which to create a new catalog.
3. Click the **Add catalog** icon. A new catalog is added as a child of the selected catalog.
4. Enter a name for the new catalog and press RETURN.

Additional Information

About Job Profiles

Edit a Job Profile Catalog

Delete a Job Profile Catalog

Create a Job Profile

Permissions

Edit a Job Profile Catalog

You can edit a job profile catalog to rename it or configure its access permissions.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can edit job profile catalogs.

To edit a job profile catalog

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the catalog you want to edit. You may need to expand the catalog hierarchy.
3. Click the action menu above the list and select an option from the drop-down list.

Additional Information

About Job Profile Catalogs

Create a Job Profile Catalog

Delete a Job Profile Catalog

About Job Profiles

Delete a Job Profile Catalog

Deleting a job profile catalog also deletes its sub-catalogs and all job profiles within it and its sub-catalogs. Any deleted job profiles are unassigned from the users they were assigned to. Competencies that have been mapped to deleted job profiles are not deleted.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can delete job profile catalogs.

To delete a job profile catalog

1. Go to **Manage Center > Talent > Job Profiles**. The Job Profiles page opens with a list of the catalogs at the top level of the hierarchy.
2. Select the job profile catalog you want to delete.
3. Click the **Delete catalog** icon.
4. Click **OK** in the confirmation dialog.

Additional Information

About Job Profile Catalogs

About Job Profiles

About Competencies

About the Job Profile Data Loader

You can add, update and delete job profiles, as well as assign or unassign competencies to existing job profiles, via the Job Profile Data Loader. You can add job profiles to existing catalogs, or create new catalogs on import.

To get started, you can download a CSV file template and populate the required fields offline in a spreadsheet application or text editor. The LMS provides information to help you fill in the CSV template, such as the expected values for each field. For more information, see Job Profile Data Loader Field Reference.

When adding a new job profile, the mandatory fields are JobProfileReferenceCode and JobProfileName.

When updating or deleting a job profile, the mandatory field is JobProfileReferenceCode.

Administrators with unrestricted access to the *Job Profile Data Loader feature* in System Roles (Manage Features > Competency Manager Features) can import job profiles.

To import job profiles, go to **Manage Center > Talent > Job Profile Data Loader**.

Preparing CSV Files for Import

To prepare a user CSV file for import, you can download a template CSV file from the Job Profile Data Loader page and populate the fields as required. Alternatively, you can run report *R419 – Job Profile Export in CSV Data Uploader Format* to export existing job profiles for editing outside of the LMS.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

> ⚠️ If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (″ ″). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Additional Information

Import Job Profiles

Job Profile Data Loader Field Reference

About Job Profiles

Import Job Profiles

You can add, update and delete job profiles, as well as assign or unassign competencies to existing job profiles, via the Job Profile Data Loader. You can add job profiles to existing catalogs, or create new catalogs on import. You must first populate in a comma—or semicolon—separated values (CSV) file a row for each job profile. For more information, see Job Profile Data Loader Field Reference.

Administrators with unrestricted access to the *Job Profile Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import job profiles.

To import job profiles

1. Go to **Manage Center > Talent > Job Profile Data Loader**. The Job Profile Data Loader page opens and lists your previous imports, if any.
2. To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.
3. If required, download the CSV file template and enter the certification award information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)
4. Click **+ Import CSV file**.
5. Click **Choose File** to select the CSV file to upload.
6. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
7. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.
9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
10. If any records failed to import, you can go back to the Job Profile Data Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

Job Profile Data Loader Field Reference

About the Job Profile Data Loader

About Job Profiles

Job Profile Data Loader Field Reference

Use the reference table below to help you correctly format the job profile data you want to import via the Job Profile Data Loader.

Administrators with unrestricted access to the *Job Profile Data Loader feature* in System Roles (Manage Features > Competency Manager Features) can import job profiles.

To import job profiles, go to **Manage Center > Talent > Job Profile Data Loader**.

Table: Job Profile Data Loader Field Reference

Field	Content (Corresponding Field in the Job Profile page)	Data Handling
Action		*A* for Add, *U* for Update, *D* for Delete.
JobProfileReferenceCode	Reference Code	A unique reference code (maximum 85 characters). This field is mandatory.
JobProfileName	Name	Any text (maximum 85 characters). This field is mandatory when the Action is *A*.

JobProfileCatalog	Job Profile Catalog	Any text (maximum 50 characters). If no catalog is specified, it defaults to General. ⓘ The General catalog can be deleted, but it must exist if no catalog is specified in the data loader. If it has been deleted, the import fails.
JobProfileOwner	Job Profile Owner	User ID of the owner (maximum 255 characters). Enter *NONE* to clear.
JobProfileActive	Active	Y for Yes (option checked) or N for No (option unchecked).
JobProfileDescription	Description	Any text (maximum 1,000 characters). Enter *NONE* to clear.
JobProfileSelfAssignment	Allows Self-Assignment	Y for Yes (option checked) or N for No (option unchecked).
JobProfileManualAssignment	Allows Reviewer Assignment	Y for Yes (option checked) or N for No (option unchecked).

CompetencyReferenceCode	Competency Name	Must be a cataloged competency code (maximum 85 characters). This field is mandatory when adding or deleting a competency assignment.
CompetencyMandatory	Mandatory Flag in Competency Assignment	Y for Yes (option checked) or N for No (option unchecked).
CompetencyRequiredLevel	Required Competency Level	Any text (maximum 255 characters). Enter *NONE* to clear.
JobProfileNumberOfRequired	Required Number of Competencies	ALL or any number no greater than the number of assigned competencies at this point.
Language	Language	The ISO code for the assigned language. For example, en, fr, fr_CA, es_ES. If no language is specified, it defaults to multi-language. Enter *ALL* for multi-language.

JobProfileAssignmentNotification ForAssignee	Job Profile Assignment Notification for Assignee E-mail	One of: • *DEFAULT* for *Send in system default template* option • *"Template Name"* for a custom e-mail notification template (maximum 100 characters). Put the template name in quotes if it contains any spaces. • *NOMAIL* for the *Do not send* option
JobProfileAssignmentNotification ForDirectAppraiser	Job Profile Assignment Notification for Direct Appraisers E-mail	One of: • *DEFAULT* for *Send in system default template* option • *"Template Name"* for a custom e-mail notification template (maximum 100 characters). Put the template name in quotes if it contains any spaces. • *NOMAIL* for the *Do not send* option

JobProfileAssignmentNotification ForJobProfileOwner	Job Profile Assignment Notification for Job Profile Owner E-mail	One of: • *DEFAULT* for *Send in system default template* option • *"Template Name"* for a custom e-mail notification template (maximum 100 characters) • *NOMAIL* for the *Do not send* option
JobProfileDeAssignmentNotification ForAssignee	Job Profile De-Assignment Notification for Direct Appraisers E-mail	One of: • *DEFAULT* for *Send in system default template* option • *"Template Name"* for a custom e-mail notification template (maximum 100 characters). Put the template name in quotes if it contains any spaces. • *NOMAIL* for the *Do not send* option

JobProfileDeAssignmentNotificationForDirectAppraiser	Job Profile De-Assignment Notification for Assignee E-mail	One of: • *DEFAULT* for _Send in system default template_ option • _"Template Name"_ for a custom e-mail notification template (maximum 100 characters). Put the template name in quotes if it contains any spaces. • *NOMAIL* for the _Do not send_ option
JobProfileDeAssignmentNotificationForJobProfileOwner	Job Profile De-Assignment Notification for Job Profile Owner E-mail	One of: • *DEFAULT* for _Send in system default template_ option • _"Template Name"_ for a custom e-mail notification template (maximum 100 characters). Put the template name in quotes if it contains any spaces. • *NOMAIL* for the _Do not send_ option
JobProfileOwnerAssignmentId	Job Profile Owner Assignment ID	Assignment ID of the owner (maximum 255 characters).

Additional Information

[About the Job Profile Data Loader](#)

Import Job Profiles

About_Job_Profile_Catalogs-copy

You can create job profile groups for convenient grouping of individual job profiles.

You can assign a certification to a job profile group so that when employees have acquired all of the competencies in a group, they are awarded the corresponding certification.

You configure job profile groups in the Job Profile Groups Editor, from which you can also see user rankings for job profiles and run job profile reports.

To use job profile groups, the Enable job profile groups system configuration setting must be enabled.

Visibility of job profile groups is determined by the competency model in which they are configured.

Administrators with unrestricted access to the *Job Profile Groups Editor* feature in System Roles (Manage
Features > Competency Manager Features) can create, edit, and delete job profile groups and map them
profiles.

To configure job profile groups, go to **Manage Center > Talent > Job Profile Groups**.

Additional Information

Create a Job Profile Group

Delete a Job Profile Group

Edit a Job Profile Group

Create a Job Profile Group

You can create a job profile group to more easily assign individual job profiles to a group. Administrators with unrestricted access to the Job Profile Groups Editor feature in System Roles (Manage Features > Competency Manager Features) can create job profile groups.

To create a job profile group

1. Go to **Manage Center > Talent > Job Profile Groups**.
2. Click the **New** icon on the Job Profile Groups Editor toolbar. The Create/Edit page opens in the editor.
3. Click **Create job profile group**. The Create job profile group page opens in the editor.
4. Enter a reference code and name for the group.
5. Select from the Job Catalog drop-down list the competency model to assign the job profile group to.
6. Enter a description for the group, if required.
7. Select the **Active** check box to allow the group to be assigned to a job profile.
8. To award a certification to learners who acquire all of the competencies in the group, click the brow icon to select the certification.
9. Click the **Save** icon on the Job Profile Groups Editor toolbar. The group is saved and you can now select the job profiles to include in the group.
10. Click
    Add job profiles to select the job profile to add to the group. You can select multiple job profiles.
11. Click the **Save** icon on the Job Profile Groups Editor toolbar. The competencies in the group are listed at the bottom of the page.

Additional Information

About Job Profile Groups

Delete a Job Profile Group

Edit a Job Profile Group

Delete a Job Profile Group

You can delete job profile groups in the Job Profile Groups Editor. Deleting a job profile group does not o
the competencies in the associated competency model or remove them from job profiles to
which the group was previously added.

Administrators with unrestricted access to the Job Profile Groups Editor feature in System
Roles (Manage Features > Competency Manager Features) can delete job profile groups.

To delete a job profile group

1. Go to **Manage Center > Talent > Job Profile Groups**.
2. To open the group you want to delete, click the **Search** icon on the Job Profile Groups
   Editor toolbar and

   search for it by name or reference code. Alternatively, select the competency model containing the

   group you want to edit from the Job catalogs drop-

   down list. The groups assigned to the selected

   competency model are listed under the drop-

   down list. Click the group name to open it in the editor.
3. Click the **Delete** icon on the Job Profile Groups Editor toolbar.
4. Click **OK** in the confirmation dialog. The group is deleted.

Additional Information

About Job Profile Groups

Create a Job Profile Group

Edit a Job Profile Group

Edit a Job Profile Group

- When editing a job profile group, you can:

- Update its basic details

- Assign it to a different competency model

- Add or remove its job profiles

- Activate or deactivate it

Administrators with unrestricted access to the *Job Profile Groups Editor* feature in System Roles (Manage Features > Competency Manager Features) can edit job profile groups.

To edit a job profile group

1. Go to **Manage Center > Talent > Job Profile Groups**.
2. The Job Profile Groups Editor opens.
3. To open the group you want to edit, click the Search icon on the Job Profile Group Editor toolbar and search for it by name or reference code. Alternatively, select the competency model containing the group you want to edit from the Job catalogs drop-down list. The groups assigned to the selected competency model are listed under the drop-down list. Click the group name to open it in the editor.
4. Update the group properties as required.
5. Click the **Save** icon on the Job Profile Groups Editor toolbar.

Additional Information

About Job Profile Groups

Create a Job Profile Group

Delete a Job Profile Group

About Job Profile Assignment Types

Job profile assignment types can be used to label the relationship between users and their job profiles. You can use Assignment Types in compliance reporting and when reviewing users' training progress through their learning path. For example, if a user is enrolled in courses required for a specific job profile, and they take extended leave before completing them, you can set the job profile's Assignment Type to *Suspended*. When administrators run reports or view the Learning Path, the designation can be interpreted appropriately.

You associate assignment types with users' job profiles by exporting job profile assignments to a CSV file via System Report 422 - Job Profile Assignments in CSV Data Loader Format, adding the required assignment types to the CSV file, and then importing it in the Job Profile Assignment Data Loader.

You can configure assignment types in the Assignment Types page.

Job profile assignments types are shown in the Learning Path, when you open the Summary dialog for a job profile, and in the Review page (**Home > Workspace > Review**).

Job profile assignments can be seen in the following reports:

- R116 - Job Profile Status Summary Report by Organization

- R116NL - Job Profile User Progress by Organization

- R117 - Job Profile Status Summary Report by Organization (Tabular)

- R131 - Competency Drilldown Report

Additional Information

Create an Assignment Type

Edit an Assignment Type

Delete an Assignment Type

About the Job Profile Assignment Data Loader

Create an Assignment Type

You can create job profile assignment types to describe a relationship between users and their job profiles.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can create assignment types.

To create an assignment type

1. Go to **Manage Center > Talent > Assignment Types**. The Assignment Types page opens with a list of existing assignment types.
2. Click **+ Create Assignment Type**. The Create Assignment Type dialog opens.
3. Enter a unique code and a display name for the assignment type.
4. Click **Save**. The dialog closes and the new assignment type is added to the list.

Additional Information

About Job Profile Assignment Types

Edit an Assignment Type

Delete an Assignment Type

Edit an Assignment Type

You can edit job profile assignment types to update their codes and descriptions.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can edit assignment types.

To edit an assignment type

1. Go to **Manage Center > Talent > Assignment Types**. The Assignment Types page opens with a list of existing assignment types.
2. Select **Edit Assignment Type** from the action menu of the assignment type you want to edit. The Edit Assignment Type dialog opens.
3. Enter a unique code and a display name for the assignment type.
4. Click **Save**. The assignment type is updated.

Additional Information

About Job Profile Assignment Types

Create an Assignment Type

Delete an Assignment Type

Delete an Assignment Type

You can delete job profile assignment types when they are no longer needed.

Administrators with unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features) can delete assignment types.

To delete an assignment type

1. Go to **Manage Center > Talent > Assignment Types**. The Assignment Types page opens with a list of existing assignment types.
2. Select **Delete Assignment Type** from the action menu of the assignment type you want to delete.
3. Click **OK** in the confirmation dialog. The assignment type is removed from the list.

Additional Information

About Job Profile Assignment Types

Edit an Assignment Type

Create an Assignment Type

About the Job Profile Assignment Data Loader

You can use the Job Profile Assignment Data Loader to assign job profiles to users, and also add, update and delete users' job profile assignment types.

To get started, run report 422 - Job Profile Assignments in CSV Data Loader Format, to export to a CSV file the users whose job assignments you want to associate assignment types to. Add the assignment types to the JobProfileAssignmentType column, and then import the CSV file via the Job Profile Assignment Data Loader.

You can only add job profile assignment types that have been defined in the Assignment Types page. For more information, see About Job Profile Assignment Types.

For more information about the Job Profile Assignment Data Loader fields, see Job Profile Assignment Data Loader Field Reference.

When assigning a job profile to a user, the mandatory fields are Action, UserID and JobProfileReferenceCode.

When associating a job profile assignment type with a user's job profile, you must also include the JobProfileAssignmentType value.

Administrators with unrestricted access to the *Job Profile Assignment Data Loader feature* in System Roles (Manage Features > Competency Manager Features) can import job profile assignments.

To import job profiles, go to **Manage Center > Talent > Job Profile Assignment Data Loader**.

Preparing CSV Files for Import

To prepare a user CSV file for import, you can download a template CSV file from the Job Profile Assignment Data Loader page and populate the fields as required. Alternatively, you can run report *R422 – Job Profile Assignments in CSV Data Loader Format* to export existing job profile assignments for editing outside of the LMS.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

> ⚠️ If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (" "). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Additional Information

Import Job Profile Assignments

Job Profile Assignment Data Loader Field Reference

About Job Profile Assignment Types

About Job Profiles

Import Job Profile Assignments

You can use the Job Profile Assignment Data Loader to assign job profiles to users, and also add, update and delete users' job profile assignment types. You must first populate in a comma—or semicolon—separated values (CSV) file a row for each job profile assignment. For more information, see Job Profile Assignment Data Loader Field Reference.

Administrators with unrestricted access to the *Job Profile Assignment Data Loader* feature in System Roles (Manage Features > Competency Manager Features) can import job profiles.

To import job profile assignments

1. Go to **Manage Center > Talent > Job Profile Assignment Data Loader**. The Job Profile Assignment Data Loader page opens and lists your previous imports, if any.

2. To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.

3. If required, download the CSV file template and enter the job profile assignment information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

4. Click **+ Import CSV file**.

5. Click **Choose File** to select the CSV file to upload.

6. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

7. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

10. If any records failed to import, you can go back to the Job Profile Assignment Data Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

Job Profile Assignment Data Loader Field Reference

About the Job Profile Assignment Data Loader

About Job Profile Assignment Types

About Job Profiles

Job Profile Assignment Data Loader Field Reference

Use the reference table below to help you correctly format the job profile assigment data you want to import via the Job Profile Assignment Data Loader.

Administrators with unrestricted access to the *Job Profile Assignment Data Loader feature* in System Roles (Manage Features > Competency Manager Features) can import job profile assignments.

To import job profile assignments, go to **Manage Center > Talent > Job Profile Assignment Data Loader**.

Table: Job Profile Assignment Data Loader Field Reference

Field	Content	Data Handling
Action	Action	*A* for Add, *U* for Update, *D* for Delete.
UserID	User ID	A valid user ID.
JobProfileReferenceCode	Reference Code	The job profile's unique reference code.
JobProfileAssignmentType	Assignment Type Code	The job profile assignment type code, as defined in the Assignment Types page. Enter *NONE* to clear.

Additional Information

About the Job Profile Assignment Data Loader

Import Job Profile Assignments

About Job Profile Assignment Types

About Job Profile Competency Quota Analytics

Competency Quotas allow LMS Administrators to designate a required number of learners to be currently assigned a given competency for a specific job profile. The required number of learners for a given Competency may vary based on the Job Profile which is assigned.

Administrators with unrestricted access to the Job Profile Competency Quota Analytics feature in System Roles (**Manage Features > Compliance Analytics**) can analyze the Job Profile Competency Quota in the Manage Center.

To analyze the Job Profile Competency Quota in the Manage Center

1. Go to **Manage Center > Reports > Job Profile Competency Quota Analytics**.
2. Select one (or more) **Job Profile Group**. This is required.
3. Select one (or more) **Job Profile**. This is optional.
4. Select one (or more) **Organization**. This is optional.
5. Select **Start Analysis**. The columns and rows are the same as the Report R140. However, some of the elements are clickable and open in a new tab or window.

Additional Information

Job Profile Competency Analytics Output

Job Profile Competency Quota Analytics Output

In the Analytics output, each row represents a Competency and contains corresponding information such as quota, target level, the number of users within the selected group who have achieved the Competency and the number of users within the selected group who are in training for the Competency.

At the top of screen, you will see the Job Profile groups that were selected when you ran the analysis. The rows themselves are organized by Job Profile (if there is more than one) with each profile used as a sub-header within the analysis.

Job Profile Competency Quota Analysis

Selected Job Profile Group(s): Workstation #1

COMPETENCY	COMPETENCY QUOTA	# WITH COMPETENCY	# IN TRAINING	TARGET LEVEL	ADMIN ADMIN(ADMIN)
Job Profile: Director					
Initiative (Initiative)	2	0	0	3 | 5	NO ☑ 👤
Effective Working (Effective Working)	2	2	0	3 | 5	NO ☑ 👤
Values and					

Columns

Below is a brief description of the columns in the analysis

- **Competency** - contains the Competency being analyzed, both the Competency name and the Competency Code. If the user who is running the analysis has either read only or unlimited set for the Role Access Control > Competency Models, the competency name is a link to editor. From there, the administrator can change the Quota and Target levels.

- **Competency Quota** - contains the quota as it is set for the Competency.

- **# With Competency** - contains the number of users within the selected group being analyzed who have achieved the Competency. **Note**: This column may be configured to be color-coded based on the quota vs. the number of users who have achieved the Competency. For example, red = less than quota, yellow = met quota, green = above quota.

- **# In Training** - contains the number of users within the selected group being analyzed who are in training for the Competency. These are users who have not achieved the Competency but are currently assigned training associated with the Competency.

- **Target Level** - contains the target level as it is set for the Competency.

- **User Columns** - the remaining columns contain information related to the Competency associated with the selected job profile group(s) in their user profile. Additional information about User columns:

  - If the user has not achieved the Competency, but is assigned training related to the Competency, the column will display the **In Training** status. If the user has not achieved the Competency, but is not assigned training related to the Competency, the column will display a **No** status.

  - If the user has achieved a Competency that has an expiration date or is set to valid for a specific time frame, the date of expiration displays in the column.

  - Administrators with the appropriate permissions can assign training and/or award the Competency from the user column. These links display as icons in the column. In the example below the ☑ icon is used to award the Competency and the 👤 icon is used to enroll the user in training. To allow this, the links will include different CSS classes to style using icons. The specific icons here are examples, and the actual icons will be designated in the CSS files within the skin.

ADMIN ADMIN(ADMIN)
NO ☑ 👤

Summary Row

The last row in the analysis is a summary row. For each user column, the percentage of competencies awarded is displayed, rounded to the nearest whole number.

Additional Information

About Job Profile Competency Quota Analytics

Action Menu

Action Menu Icon

(legacy UI)

Action Menu Icon

(Responsive UI)

The action menu is a drop-down list from which you can select an action (for example, create or delete an object).

The LMS presents many objects in lists, for both learners and administrators, including learning modules, classroom resources, user accounts, and enrollment requests. Each item in the list has an action menu.

Permissions

Access to objects in the LMS is controlled by permissions, which you configure in the standard Permission Selector.
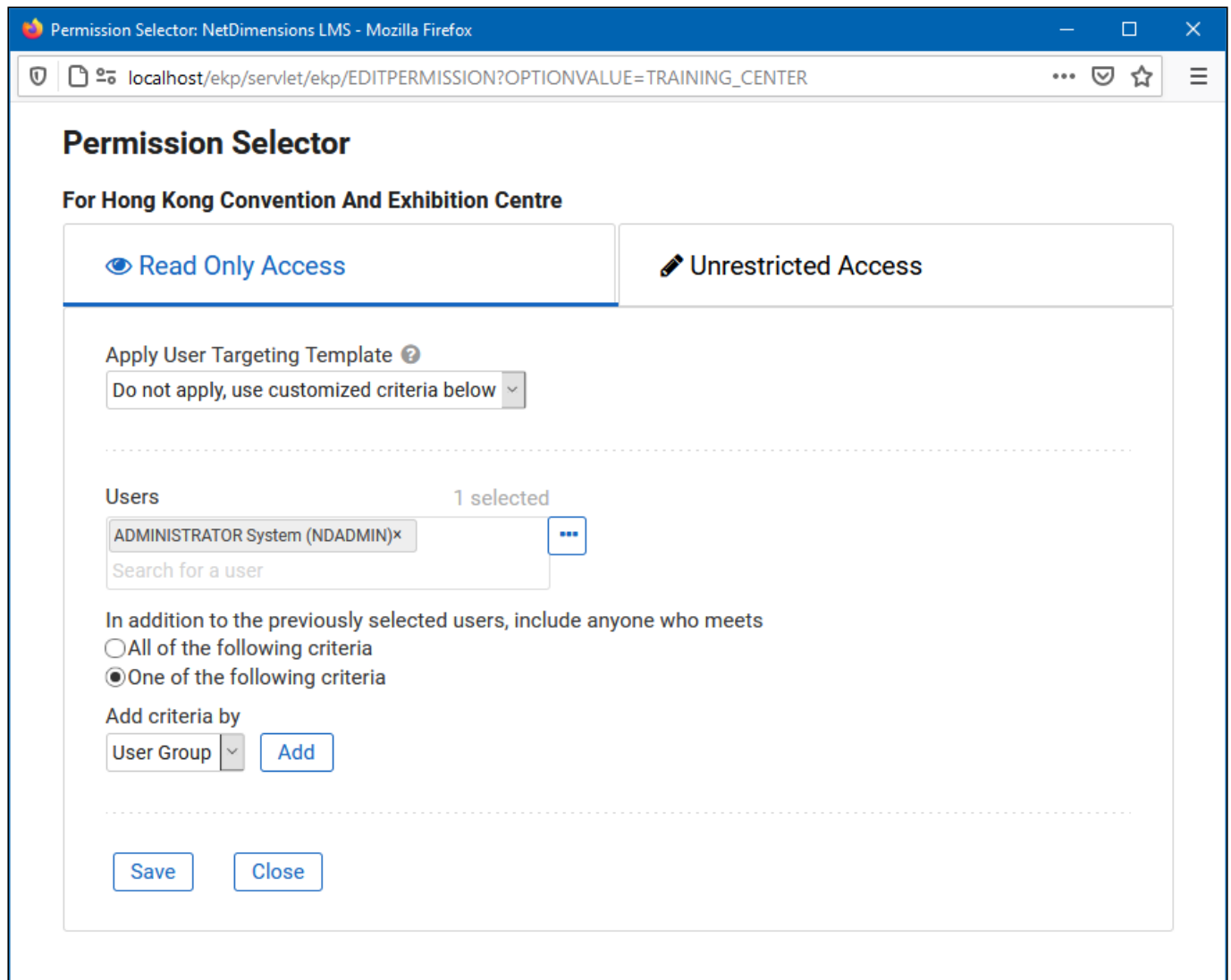

Figure: Permission Selector for Read Only Access to a Training Center

You can provide users with read-only or unrestricted access to many of the objects configured in the LMS, such as course catalogs, individual sessions, training centers and email templates, to name only a few. Read-only access allows user to view the object while unrestricted access allows users to view and modify it.

Selecting Users

There are several ways to select the users you want to configure access for:

- User targeting templates

- Selecting one or more specific users

- Selection criteria based on user group, organization or role

- Selection criteria based on organization attributes (for Auto-enroll and Job Profile Auto-assign permissions only)

User targeting templates are pre-defined selections of users. If you specify a user targeting template, you cannot select individual users or use other selection criteria.

You can combine one or more individually selected users with one or more user groups, organizations and roles.

Because organizations can have a hierarchical structure, you can select organizations to include and those to exclude. This enables you to select a parent organization but exclude one or more of its child organizations.

Additional Information

Select Users for Permissions

About User Targeting Templates

User Selector

You select users to include in permissions or other user targeting features in the User Selector. To select users, you search for them with the optional search criteria and then select from the results those users you want to include.
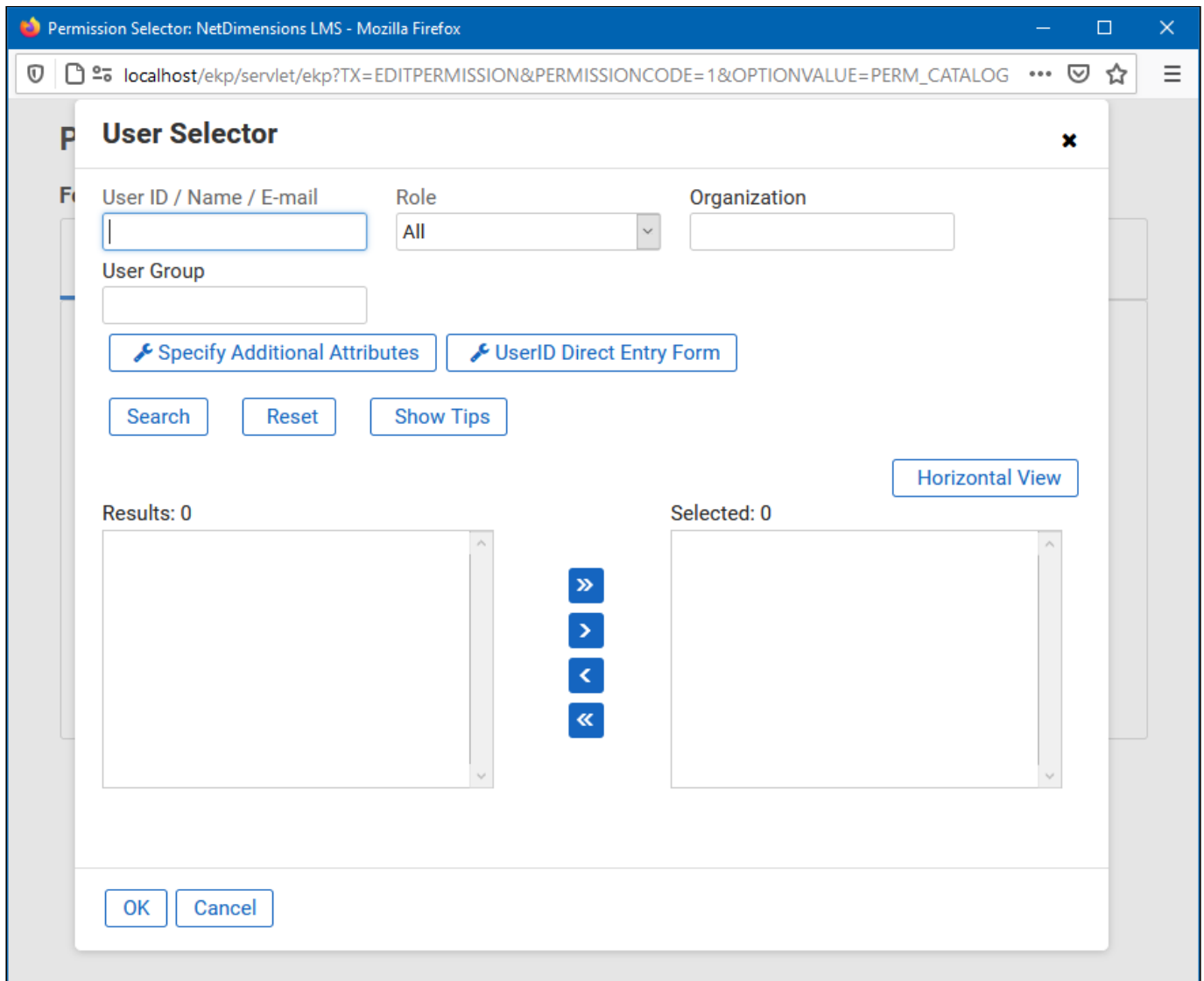

Figure: User Selector Accessed from the Permission Selector

The User Selector is available from various administration pages in the LMS where you can select users to target, including the Permission Selector and User Targeting Template Manager.

To select one or more users to include in the selection

1. Click the browse icon next to the Users field. The User Selector page opens on top of the page you called it from. Any users already selected in the Users field are included in the Selected box in the User Selector.

2. Enter or select criteria to filter the search for users (you can use advanced search syntax in the User ID / Name / E-mail field).

3. Optionally, click **Specify Additional Attributes** to search for users with specific profile criteria, including any User Attribute values. If you specify additional attributes, ensure their criteria do not contradict any in the User ID / Name / E-mail, Role, Organization or User Group fields above.

4. Optionally, click **User ID Direct Entry Form** to enter one or more User IDs, either directly or copied and pasted in from a plain text file or spreadsheet. The User ID Cut and Paste Direct Entry Form page opens in a new window and includes instructions for how to enter a list of User IDs.

5. Click **Search** to list all users meeting your search criteria.

6. To select individual users from the Results box, `Ctrl`+click to select separated individual users or `Shift`+click to select a contiguous block of users and then click the right-facing chevron icon to move them over to the Selected box.

7. To select all of the users in the Results box, just click the right-facing double chevron icon to move them over to the Selected box.

8. Click **OK** to confirm your selection and close the User Selector.

Additional Information

Search Guidelines for the Users List

Permissions

About User Targeting Templates

About User Targeting Templates

User targeting templates enable you to specify the criteria for selecting users and then use the template to select users, such as when setting permissions for viewing courses in the Catalog Browser or search results. When you create a user targeting template your selection criteria are saved in the template so that you don't have to keep specifying the same criteria for different features in the LMS.

Administrators can use user targeting templates to select users in the following user selectors:

- Permission Selector

- Appraisal Target Audience Selector

- Activate a System Language

- Create Token Package

- Terms of Use Manager

To manage user targeting templates, your user role must have unrestricted access to the *User Targeting Template Manager* feature in System Roles (Manage Features > User Manager Features).

To manage user targeting templates, go to **Manage Center > Users > User Targeting Template Manager**.

Set Access Permissions for a Template

When you create a user targeting template only your user account has access to it, and therefore only you can use it to select users. To allow other LMS users to access a template, you must give them read-only permission in the Permission Selector. To allow other LMS users to edit a template, you must give them unrestricted permission.

Editing and Deleting Templates

The Edit and Delete actions are available from the action menu only if you have unrestricted permission for the template.

User Targeting Template Support in Data Loaders

You can specify a user targeting template in the following data loaders:

- Role Access Data Loader

- Question Data Loader

- Equivalency Rule Data Loader

ⓘ Note that to use a template in a data loader, the person uploading the CSV data file must have at least Read Only permission for the template.

Using a User Targeting Template as a Search Filter

When the *Enable User Targeting Template Search Filter* System Configuration setting is enabled, an advanced search filter is added to some pages (for example, Learning Modules) that enable you to search for all objects of the given type that use a given User Targeting Template for either read or write permissions.

Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

Create a User Targeting Template

Administrators can use user targeting templates to select users according to specific criteria for various LMS features that target a defined set of users. To use user targeting templates, your user account's system role must have the required User Targeting Template Manager access control setting.

When selecting users to include in a template, you can combine one or more individually selected users with one or more user groups, organizations and roles.

> ⓘ Because organizations can have a hierarchical structure, you can select organizations to include and those to exclude. This enables you to select a parent organization but exclude one or more of its child organizations.

To create a user targeting template

1. Go to **Manage Center > Users > User Targeting Template Manager**. The User Targeting Template Manager lists any user targeting templates that you have Read Only or Unrestricted access permission for.
2. Click **+ Create Template**. A new blank user targeting template opens.
3. Enter a unique code and a short, descriptive name for the template.

4. In the User Targeting Template settings box, select the users to include in the targeting template.

5. To select users in the Users box, start typing a user's ID or name and select a user from the auto-complete list, or click the **browse** icon to open the User Selector.

6. To select users from user groups, organizations and roles, select the criteria from the drop-down list and click **Add**. A selection box appears.
7. Click inside the selection box or on its title to select the user groups, roles or organizations to select the users from.
8. Click **Save**. The template is added to the list on the User Targeting Templates page.
9. To configure the access permissions for a template, select **Permissions** from its action menu.

Additional Information

About User Targeting Templates

User Selector

Permissions

Permissions

User Targeting Templates in Data Loaders

When you specify a user targeting template in a data loader, you can choose whether subsequent changes to the user targeting template will be applied to the LMS object that uses it to select users (for example, System Roles). If not, the user targeting template criteria are copied to the LMS object and any subsequent changes to the user targeting template are not applied.

The following table describes the data loader fields you use to specify how the user targeting template will be applied to the LMS object.

Table: User Targeting Template Fields in Data Loaders

Field	Description
Read Permissions Template	Enter the code of the template to use for read permissions.
Write Permissions Template	Enter the code of the template to use for write permissions.
Target Audience Template	Enter the code of the template to use for target audience.
AssignReadTemplate	Enter L to link to the user targeting template as the permission targeting criteria. Subsequent changes to the template will be applied to the targeting criteria. Enter C to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria.
AssignWriteTemplate	Enter L to link to the user targeting template as the permission targeting criteria. Subsequent changes to the template will be applied to the targeting criteria. Enter C to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria.

| AssignTargetAudienceTemplate | Enter L to link to the user targeting template as the target audience criteria. Subsequent changes to the template will be applied to the targeting criteria.

Enter C to completely copy and replace the target audience settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria. |
| --- | --- |

ⓘ   For the Equivalency Rule Data Loader the Target Audience will be set to specified user targeting template even if the *Apply Target Audience to All Organizations* data loader option has been enabled.

Additional Information

About User Targeting Templates

Create a User Targeting Template

Attribute Option Values

You can configure the options for drop-down list attributes.

Table: Attribute option fields

Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look up the localized value in the user's preferred language.
Description	Enter a description of the option value, if required.

Additional Information

Create a Module Attribute

Create a Session Attribute

Create a Transcript Attribute

Create a Class Resource Attribute

Create an Organization Attribute

Create a Certificate Award Attribute

Create a Question Attribute

Allowed Transitions Between Dynamic Attribute Types

Table: Allowed transitions between dynamic attribute types

Transition	Effect on objects that have assigned a value to the attribute
From Drop-Down to Free Text	The drop-down attribute value on the object will be changed to the drop-down value code as free text. The possible dynamic attribute values configured for the former drop-down dynamic attribute will be deleted.
From Free Text to Drop-Down	Existing free text values on objects will be used to generate a set of possible dynamic attribute values for the new drop-down dynamic attribute.
From Free Text to Text Area	Existing free text values on objects will be moved to the text area.
From Free Text to Numeric	All free text values on objects will be checked to make sure they are either blank or numeric values before the change is allowed to take place.
From Numeric to Free Text	The numeric values on objects will become free text.
From Text Area to Free Text	Existing text area values on objects will be moved to the free text.

Additional Information

Edit a Module Attribute

Edit a Session Attribute

Edit a Transcript Attribute

Edit a Class Resource Attribute

Edit an Organization Attribute

Edit a Certificate Award Attribute

Edit a Question Attribute

About Language Bundles

A language bundle is a collection of localizable and translatable fields and language-specific contents in a given language that can be added to an object in the LMS (for example, a course, catalog, or news article). Different LMS objects can have their own set of localizable fields. All localizable objects have a primary language, which is the default language used. You can manage the language bundles for each object independently.

For more information about multi-language support for the LMS, please refer to the *EN600 Multi-language Content Support* Implementation Guide.

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