PeopleFluent Learning

HR Administration

Release 25.06

Contents

Legal Notice

Website: peoplefluent.com

HR Administration

HR administration deals with configuration and day-to-day tasks relating to human resources activities, including:

- Creating and managing certifications that can be awarded to learners upon successful course completion.
- Creating and managing competencies that can be awarded to learners when specific training requirements are fulfilled.
- Creating and managing job profiles, set of competencies that describe a learner's overall training needs.

Create and Manage 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 the passing of an exam. Learners can use them to demonstrate their skills in specific areas. Certifications can also be listed in third-party tools, such as LinkedIn, as evidence of course completion or skill attainment.

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.
- In bulk via the Awarded Certificates Data Loader.

Certifications can be assigned a period of validity, where they expire after a specific period of time (for example, a number of days or years from the date they were awarded, or on a specific date each year). Email notifications can be configured that alert learners can certifications expire.

> To create, edit and delete certifications, you must have unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager). You can view certifications with read-only access.

Create a Certification

To create a certification

1. Go to **Manage Center > Learning > Certification Manager > Certifications**.
2. Click **+ Create Certification**.
3. Configure the Certification fields as required. For detailed information about certification properties, please see Certification Properties Field Reference.
4. Click **Create certification**.

Set the Certification Permissions

Once a certification is saved, you can set the permissions.

To manage certification permissions

1. Go to **Manage Center > Learning > Certification Manager > Certifications**.
2. Locate the appropriate certification and select View from the action menu.

3. Click the **Permissions** link (located under Access Control in the Certification Details section).
4. Configure the permissions as necessary. For additional information about the Permission Selector, please see Permissions.
5. Click **Save**.

Add a Language Bundle to the Certification

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.

To add a language bundle

1. Go to **Manage Center > Learning > Certification Manager > Certifications**.
2. Locate the appropriate certification and select **Manage Language Bundles** from the action menu.
3. Click **+ Add Language Bundle**.
4. Select a language to assign to the certification.
5. Enter the certification name in the new language.
6. Click **Add**.

Delete a Certification

You can delete certifications you have created or those for which you have been given unrestricted access permission.

To delete a certification

1. Go to **Manage Center > Learning > Certification Manager > Certifications**. Take one of the following actions.
    - To delete an individual certification, locate the appropriate item and select Delete from the action menu.
    - To delete multiple certifications, select the check boxes for the appropriate certifications and then select Delete from the Bulk Action drop-down list.
2. Click **OK**.

Import Awarded Certificates via the Data Loader

You can award certifications to one or more learners at once, or delete certifications from learners' transcripts, via the Awarded Certificates CSV Loader.

> To import awarded certificates CSV files, you must have unrestricted access to the *Awarded Certificates CSV Loader* feature in System Roles (Manage Features > Certification Manager).

Create the CSV File

To create the CSV import file:

1. Go to **Manage Center > Learning > Certification Manager > Awarded Certificates CSV Loader**.
2. Download the CSV file template.

The CSV file template includes any certificate award attributes (prefixed with *CT-*).

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Awarded Certificates CSV Loader Field Reference for detailed information about the fields.

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.

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).

Import Awarded Certificates

To award or delete certifications via the Awarded Certificates CSV Loader

1. Go to **Manage Center > Learning > Certification Manager > Awarded Certificates CSV Loader.**
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. 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.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. 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.

Import Certification History via the Data Loader

With the Certification History Data Loader, you can import historical Certification data.

> To import certification history, you must have unrestricted access to the *Certification History Data Loader* feature in System Roles (Review Sub-Menu Features).

Create the CSV File

1. Go to **Manage Center > Learning > Certification Manager > Certification History Data Loader**.
2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Certification History Data Loader Field Reference for detailed information about the fields.

When importing Certification history, the following fields are required:

- Action
- Event
- UserID
- CertificationCode

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).

Import the Certification Data

To import competencies

1. Go to **Manage Center > Learning > Certification Manager > Certification History Data Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. To create new Certification models and sub-models when importing competencies, select the **Create new catalogs found in CSV file** check box.
7. 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.
8. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
9. If any records failed to import, you can go back to the Certification 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.

Create and Manage Certification Types

Certifications can be categorized using certification types. For example, you may want to have separate certification types for internal and external courses.

> To create, edit and delete certification types, you must have unrestricted access to the *Certification Utilities* feature in System Roles (Manage Features > Certification Manager). You can view certification pools with read-only access.

Create a Certification Type

To create a certification type

1. Go to **Manage Center > Learning > Certification Manager > Certification Type**.
2. In the **New Name** field, enter the name of the new type.
3. Click **Add**. The pool is added as an option in the **Certification Type** field.

Delete a Certification Type

You can delete certification types that you created or those for which you have unrestricted access permission. Only types that do not have certifications assigned to them can be deleted.

To delete a certification type

1. Go to **Manage Center > Learning > Certification Manager > Certification Type**.
2. Select the certification type you want to delete from the **Certification Type** field.
3. Click **Delete selection.**
4. Click **OK**.

Create and Manage Certification Pools

You can group related certifications into pools for easy reference and assignments.

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

Create a Certification Pool

To create a certification pool

1. Go to **Manage Center > Learning > Certification Manager > Certification Pool**.
2. In the **New Name** field, enter the name of the new pool.
3. Click **Add**. The pool is added as an option in the **Certification Pool** field.

Set Permissions for a Certification Pool

You can set the permissions to allow other administrators full or read-only access to a certification pool.

To set the permissions for a certification pool

1. Go to **Manage Center > Learning > Certification Manager > Certification Pool**.
2. In the **Certification Pool** field, select the appropriate pool.
3. Click the **Permissions** button.
4. Configure the permissions as necessary. For additional information about the Permission Selector, please see Permissions.
5. Click **Save**.

Delete a Certification Pool

You can delete certification pools that you created or those for which you have unrestricted access permission. Only pools that do not have certifications assigned to them can be deleted.

To delete a certification pool

1. Go to **Manage Center > Learning > Certification Manager > Certification Pool**.
2. Select the certification pool you want to delete from the **Certification Pool** field.
3. Click **Delete Selection**.
4. Click **OK**.

Create and Manage Certificate Award Attributes

Certificate award attributes are custom fields that allow you to capture additional information about awarded certificates, beyond the standard LMS fields. You can create these custom attribute fields, and reviewers can assign values to them when awarding certifications or importing them via the CSV loader. These fields are also shown in certification reports in the learners' Career Development Center.

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

Create a Certificate Award Attribute

> 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 > Certification Manager > Certificate Award Attributes**.
2. Click **+ Create Certificate Award Attribute**.
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. The data type determines the type of value that can be assigned to 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.
8. Once you have saved the new certificate award attribute, you can set the permissions. Click the **Permissions** button and assign permissions as necessary.

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, seeAllowed Transitions Between Dynamic Attribute Types.

To edit a certificate award attribute

1. Go to **Manage Center > Learning > Certification Manager > Certificate Award Attributes**.
2. Locate the appropriate certificate award attribute.
3. To edit an attribute's permissions only, select **Permissions** from its action menu.
4. To edit an attribute's properties and permissions, select **Edit** from its action menu. The Edit Certificate Award Attribute page opens.
5. Update the attribute's properties as required.
6. To add an option to a drop-down list attribute, click **Add New Option**. The Create Certificate Award Attribute Values list opens.
7. 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.
8. Optionally, click **Permissions** to edit the attribute's permissions.
9. Click **Save**.

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.

To delete a certificate award attribute

1. Go to **Manage Center > Learning > Certification Manager > Certificate Award Attributes**.
2. Locate the appropriate attribute and select **Delete** from the action menu.
3. Click **OK**.

Manage PDF Certificates

PDF Certificates

PDF certificates can be associated with certifications. These documents provide proof of course completion or passing of the associated exam. You can create custom PDF templates and upload them to the certifications. Form fields are dynamically filled in with learner and course information, such as module, user and custom attribute information. 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.

Creating the PDF Certificate

PDF Certificates are created outside of the LMS and then uploaded to the LMS Repository. They can be created in Microsoft Word or Adobe Acrobat.

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 these fields in PDFs, and the LMS will populate them 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.

For information about uploading files to the LMS Repository, please see The Repository Manager.

Assign a PDF Certificate to a Certification

> To create and manage certifications, you must have unrestricted access to the *Certification Manager* features in System Roles (Manage Features > Certification Manager).

To assign a PDF certificate to a certification

1. Go to **Manage Center > Learning > Certification Manager > Certifications.**
2. Locate the appropriate certification and select View from the action menu.
3. In the **Certificate Template (PDF form)** field, click the ellipses to select the appropriate document.
4. Check the **Allow user to print the certificate** field to allow this functionality.

5. To attach the certificate to an award message assigned to the certification, check the **Attach certificate to notifications to** field and select the appropriate notifications.
6. Click **Save**.

Create and Manage 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.

> To create, edit and delete competency models and competencies you must have unrestricted access to the *Competency Models* feature in System Roles (Manage Features > Competency Manager Features).

Create a Competency Model

To create a competency model

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
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.

Set the Permissions for a Competency Model

Once you have created a competency model, you can set the permissions.

To set the permissions for a competency model

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the appropriate competency model.
3. Click the action icon located above the model list and select **Permissions**.
4. Set the permissions as appropriate.
5. Click **Save**.

Rename a Competency Model

To rename a competency model

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the appropriate competency model.
3. Click the action icon located above the model list and select **Rename selected**.
4. Enter a new name.

5. Click **Save**.

Map a Competency Model to a Job Profile

You can map a competency model to a job profile to automatically map its competencies to that job profile.

To map a competency model to a job profile.

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the appropriate competency model.
3. Click the action icon located above the model list and select **Map Model to Job Profile**.
4. Select the **Search** button and select the appropriate job profile.
5. Scroll to the bottom of the list and click **Next**.
6. Click the required level for each competency.
7. Click **Map to Job Profile**.
8. Click **Save**.

Delete a Competency Model

To delete a competency model

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the appropriate competency model.
3. Click the **Delete competency model** icon.
4. Click **OK**.

> 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.

Import Competency Data via the Data Loader

With the Competency Data Loader, you can import competencies and add them to models, update and delete competencies, assign proficiency levels and more.

This topic focuses on creating Competencies through an import process. For information about creating Competencies within a Competency Model, please see Create and Manage Competencies.

> To import competencies, you must have unrestricted access to the *Competency Data Loader* feature in System Roles (Manage Features > Competency Manager Features).

Create the CSV File

You have two options for creating a CSV Import File.

- Run report *R420 – Competency Export in CSV Data Uploader Format* to export existing competencies for editing outside of the LMS.
- **Download the CSV template**
  1. Go to **Manage Center > Talent > Job Profile Assignment Data Loader.**
  2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Competency Data Loader Field Reference for detailed information about the fields.

When creating competencies the mandatory fields are:

- ReferenceCode
- Title

When deleting competencies, only ReferenceCode is required.

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).

Import the Competency Data

To import competencies

1. Go to **Manage Center > Talent > Competency Data Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. To create new competency models and sub-models when importing competencies, select the **Create new catalogs found in CSV file** check box.
7. 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.
8. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
9. 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.

Import Competency Expiry Data via the Data Loader

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

> To import competencies, you must have unrestricted access to the *Competency Expiry Data Loader* feature in System Roles (Manage Features > Competency Manager Features).

Create the CSV File

To create the CSV import file:

1. Go to **Manage Center > Talent > Competency Expiry Data Loader**.
2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Competency Expiry Data Loader Field Reference for detailed information about the fields.

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

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).

Import Competency Expiry Data

To import competency expiry data

1. Go to **Manage Center > Talent > Competency Expiry Data Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.

5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. 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.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. 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.

Import Competency History via the Data Loader

With the Competency History Data Loader, you can import historical competency data.

> To import competencies, you must have unrestricted access to the *Competency History Data Loader* permission in System Roles (Review Sub-Menu Features).

Create the CSV File

1. Go to **Manage Center > Talent > Competency Manager > Competency History Data Loader**.
2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Competency History Data Loader Field Reference for detailed information about the fields.

When importing Competency history, the following fields are required:

- Action
- Event
- UserID
- CompetencyCode

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).

Import the Competency Data

To import competencies

1. Go to **Manage Center > Talent > Competency Manager > Competency History Data Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. To create new competency models and sub-models when importing competencies, select the **Create new catalogs found in CSV file** check box.
7. 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.
8. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
9. 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.

Create and Manage 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.

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

Create a Competency Group

To create a competency group

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Click **Groups**.
3. Click the **New** icon on the Competency Group Editor toolbar.
4. Click **Create competency group**.
5. Enter a reference code and name for the group.
6. Select the competency model to assign the competency group to from the **Competency Catalog** drop-down list .
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.

> Generally, certifications are only awarded the first time a learner acquires all of the competencies. However, your instance may be configured to allow certifications to be re-awarded if the learner completes the requirements again. Please contact your system administrator to understand your organization's set up.

10. Click the **Save** icon on the Competency Group Editor toolbar.
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.

Edit a Competency Group

To edit a competency group

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Click **Groups**.
3. Click the name of the appropriate competency group to open it.
4. Make the edits as necessary.
5. Click **Save**.

Delete a Competency Group

To delete a competency group

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Click **Groups**.
3. Click the name of the appropriate competency group to open it.
4. Click the **Delete** icon on the Competency Groups Editor toolbar.
5. Click **OK**.

Create and Manage Competencies

A Competency can either be a specific learned ability (sometimes called a skill), or the application of knowledge to be successful in a given job. A competency in the LMS is typically defined by a set of courses provided through the LMS. Competencies are acquired by fulfilling the training requirements. This can include completing one or more courses and passing any associated exams.

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

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.

This topic focuses on creating and managing Competencies through the Competency Models page. Competency data and Competency expiry data can also be imported via a Data Loader. See one of the following topics for more information:

- Import Competency Data via the Data Loader
- Import Competency Expiry Data via the Data Loader

> To create competencies and add them to a competency model you must have unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features).

Create a Competency

To create a competency

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the Competency Model in which to create a new competency.
3. Click the **+ Create Competency**.
4. Enter the details for the new competency. For detailed information about the available competency fields, please see Competency Details Field Reference.
5. Click **Save**. The competency is added to the list for the selected model.

Clone a Competency

The clone feature allows you to create a new competency from an existing one, retaining the properties from the original.

To clone a competency

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the model containing the competency you want to clone.
3. Select **Clone** from the action menu of the competency you want to clone.
4. Enter the details for the new competency.
5. Click **Save**. Make any necessary edits to the new competency.

Delete a Competency

Generally, competencies cannot be deleted if they are in use (awarded to a user, used in a competency assessment, etc.) However, your system may be configured to allow competencies to be deleted regardless of usage. Please contact your system administrator if you have questions about your organization's set up. **Excercise caution when deleting competencies; this action cannot be reversed**.

To delete a competency

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the model containing the competency you want to delete.
3. Select Delete from the action menu of the competency you want to delete.
4. Click **OK** in the confirmation dialog.

Assign a Language Bundle to a Competency

To assign a language bundle to a competency

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Select the appropriate competency model. The associated competencies display on the right.
3. Locate the appropriate competency and select **Manage Language Bundles** from the action menu.
4. Click **+ Add Language Bundle**.
5. Select a language to assign to the competency.
6. Enter the competency title in the new language.

7. Click **Add**.
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**.

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 Manager > Competency Models**.
2. Select the model containing the competency you want to map to a job profile.
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.

Create and Manage Competency Proficiency Levels

Proficiency levels are the scales used to rate learners on competencies. Proficiency levels are created separately an can then be assigned to competencies. When a competency is awarded, the proficiency level can be selected.

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

Create a Proficiency Level Group

To create a proficiency level group

1. Go to **Manage Center > Talent > Competency Manager > Proficiency Levels**.
2. Click the **Add** icon above the proficiency groups list.
3. Enter a name for the new proficiency level and press RETURN.

Add a Proficiency Level to a Group

To add a proficiency level to a group

1. Go to **Manage Center > Talent > Competency Manager > Proficiency Levels**.
2. Select appropriate proficiency level group. An area where you can manage the proficiency levels displays on the right.
3. Click the **Add** icon that displays above the area on the right. 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.

Delete a Proficiency Level

1. Go to **Manage Center > Talent > Competency Manager > Proficiency Levels**.
2. Select appropriate proficiency level group. Configured proficiency levels display on the right.
3. Locate the appropriate proficiency level and select **Delete** from the action menu.
4. Click **OK**.

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

Delete a Proficiency Level Group

To delete a proficiency level group

1. Go to **Manage Center > Talent > Competency Manager > Proficiency Levels**.
2. Select appropriate proficiency level group.
3. Click the **Delete** icon above the proficiency groups list.
4. Click **OK**.

Create and Manage Competency Custom Attributes

Competency custom attributes provide you with the ability to capture competency information that is custom to your organization and to filter LMS data based on the attribute. These are custom attributes that are applied at the competency level, further describing the competency. These attributes will apply to all users with the competency.

> To create and manage competency custom attributes, your role must have unrestricted access to the Job Profile Attributes permission (System Roles > Manage Features > Competency Manager Features)

Create a Competency Custom Attribute

1. Go to **Manage Center > Talent > Competency Manager > Competency Attributes**.
2. Click **+ Create Competency Attribute**.
3. In the **Details** section, enter values in the **Attribute Code** (required) and **Name** fields.
4. Select the field type from the drop-down options. This determines the values that can be assigned to the attribute.
    - 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). Note: You will need to save the attribute before you can add values to the drop-down 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)
5. In the **Display Area Settings** section, choose where the attributes will be displayed in the system.
    - **Competency Details** - displays the attribute in the when a user views a competency's details.
    - **Learning Path** - displays the attribute in the **Competency Summary** page in the learning path.

6. Click the **Permissions** button to set the permissions for the attribute. Users with read-only access can view the attribute. Users with unrestricted access can view and edit the attribute.
7. Click **Save**. The attribute is added to the list.

To edit, delete or update the permissions only for a competency attribute, locate the attribute in the list and select the appropriate option from the action menu.

Managing Attribute Values in the Competency

Users with unrestricted access to a competency can set the values for the competency attribute.

1. Go to **Manage Center > Talent > Competency Manager > Competency Models**.
2. Locate the appropriate competency. Click on the action menu and select **Edit competency**.
3. Locate the appropriate custom attribute and set the value. Custom attributes are located below the **Active checkbox** in the **Competency Details** section.
4. Click **Save**.

Manage SFIA Libraries in Competencies

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.

You must import an SFIA library before you can add its competencies to a model.

> 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.

Import an SFIA Library

To import an SFIA library

1. Go to **Manage Center > Talent > Competency Manager > Library**.
2. Click the **Import/add competency library** icon.
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.

Add SFIA Library Competencies to 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.

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

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

1. Go to **Manage Center > Talent > Competency Manager > Library**.
2. Expand the library hierarchy and select the category or subcategory.
3. Select **Add category to model** from the action menu.
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**.
2. Expand the library hierarchy and select the category or subcategory containing the competencies you want to add.
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.
5. Expand the model hierarchy and select the competency model to add the category to.
6. Click **Add to model**.

Award Competencies in the Manage Center

This topic focuses on how to award and revoke Competencies in the Manage Center. Competencies can also be awarded by reviewing learners in the Workspace Review page.

> To manage competencies in the Manage Center you must have unrestricted access to the *Competency Manager* and *Competency Model* features in System Roles (Manage Features > Competency Manager Features).

Award Competencies in the Manage Center

You can award a competency to one or more learners in the Manage Center. To award a competency

1. Go to **Manage Center > Talent > Competency Models**.
2. Select the model containing the competency you want to award.
3. Select **Edit** from the action menu of the competency you want to award.
4. Click the **User Review** tab.
5. Click **+ Award Competency**.
6. Select the proficiency level of the competency to award and click **Next**.
7. In the **Provide Details** screen, 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. Enter information in the additional fields as necessary. Comments are required.
8. Review the award details and click **Next**. The competency is awarded to the selected users.
9. Click **Close**.

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.

To revoke a competency

1. Go to **Manage Center > Talent > Competency Models**.
2. Select the model containing the competency you want to revoke.
3. Select **Edit** from the action menu of the competency you want to revoke.

4. Click the **User Review** tab.
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**.

Create and Manage 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 in the following ways:

- Individually or in groups by a reviewer (for example, their direct appraiser or manager) in the Career Development Center or the Job Profile editor.
- Auto-Assignment via the Job Profile editor.
- In bulk via the Job Profile Assignments Data Loader.

> To create and manage job profiles, you must have unrestricted access to the *Job Profiles* feature in System Roles (Manage Features > Competency Manager Features).

Create a Job Profile

To create a job profile

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
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. For detailed information about the job profile fields, please see Job Profile Details Field Reference.
5. Click **Save**. The job profile is added to the list for the selected catalog.

Clone a Job Profile

You can clone an existing job profile to create a new one, retaining the details from the cloned item.

To clone a job profile

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
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**. Make edits to the job profile as required.

Group Assign a Job Profile

To group assign a job profile

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Select the catalog containing the job profile you want to assign to a group of users.
3. Select **Edit** from the action menu of the job profile.
4. Click **Group Assign**.
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.

Auto Assign a Job Profile

The LMS allows you to auto-assign job profiles to learners based on specified criteria such as user group, role, competencies, completed courses and other attributes. Criteria for auto-assignment is configured in the Job Profile. The LMS will periodically scan the user profiles, looking for records that match the job profiles criteria, and assign any matches to the profile. You can configure scan intervals.

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.)

> 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.

To auto assign a job profile

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Select the catalog containing the job profile you want to assign to a group of users.
3. Select **Edit** from the action menu of the job profile.
4. Click **Auto-Assign**.

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. You can select users based on any combination of the following properties:
    - 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
6. Click **Set Auto-Assign Targets**.

Configure Job Profile Auto-Assignment Scans

To configure the scan intervals for automatically assigning job profiles

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Click **Auto-Assign Console**.
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.

Edit a Job Profile

To group assign a job profile

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Select the catalog containing the job profile you want to edit.
3. Select **Edit** from the action menu of the job profile.
4. Make edits as necessary.
5. Click Save.

Delete a Job Profile

To group assign a job profile

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Select the catalog containing the job profile you want to delete.
3. Select **Delete** from the action menu of the job profile.
4. Click **OK**.

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

Create and Manage Job Profile Catalogs

Job profile catalogs are containers for organizing your job profiles. For example, you could have 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.

> To configure job profile catalogs you must have unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features).

Create a Job Profile Catalog

To create a job profile catalog

1. Go to **Manage Center > Talent > Competency Manager > 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.

Rename a Job Profile Catalog

To rename a job profile catalog

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Select the catalog you would like to rename.
3. Click the action menu located above the catalog list and select **Rename selected**.
4. Enter a new name for the catalog and press RETURN.

Delete a Job Profile Catalog

To rename a job profile catalog

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Select the catalog you would like to rename.
3. Click the **Delete catalog** icon.
4. Click **OK**.

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.

Create and Manage Job Profile Groups

You can create job profile groups for convenient grouping of individual job profiles. You can assign a certification to a job profile group; when employees have acquired all of the competencies in a group, they are awarded the corresponding certification.

> To create, edit and delete job profile groups and map them to job profiles you must have unrestricted access to the the Job Profile Groups Editor feature in System Roles (Manage Features > Competency Manager Features).

Create a Job Profile Group

To create a job profile group

1. Go to **Manage Center > Talent > Competency Manager > Job Profile Groups**.
2. Click the **New** icon on the Job Profile Groups Editor toolbar.
3. Click **Create job profile group**.
4. Enter a reference code and name for the group.
5. Select an option from the **Job Catalog** drop-down field options.
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 browse icon to select the certification.

> Generally, certifications are only awarded the first time a learner acquires all of the competencies. However, your instance may be configured to allow certifications to be re-awarded if the learner completes the requirements again. Please contact your system administrator to understand your organization's set up.

9. Click the **Save** icon on the Job Profile Groups Editor toolbar.
10. Click **Add job profiles** to select the job profile to add to the group. You can select multiple job prof
11. Click the **Save** icon on the Job Profile Groups Editor toolbar.

Edit a Job Profile Group

To edit a job profile group

1. Go to **Manage Center > Talent > Competency Manager > Job Profile Groups**.
2. Click the name of the appropriate job profile group to open it.
3. Make the edits as necessary.

4. Click **Save**.

Delete a Job Profile Group

To Delete a job profile group

1. Go to **Manage Center > Talent > Competency Manager > Job Profile Groups**.
2. Click the name of the appropriate job profile group to open it.
3. Click the **Delete** icon on the Job Profile Groups Editor toolbar.
4. Click **OK**.

Deleting a job profile group does not delete the competencies in the associated competency model or remove them from job profiles to which the group was previously added.

Create and Manage 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.

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

> To create and manage assignment types you must have unrestricted access to the *Job Profiles feature* in System Roles (Manage Features > Competency Manager Features).

Create an Assignment Type

To create an assignment type

1. Go to **Manage Center > Talent > Competency Manager > Assignment Types**.
2. Click **+ Create Assignment Type**.
3. Enter a unique code and a display name for the assignment type.
4. Click **Save**.

Set the Permissions for an Assignment Type

Once an assignment type is created, you can set the permissions.

1. Go to **Manage Center > Talent > Competency Manager > Assignment Types**.
2. Locate the appropriate assignment type and select Permissions from the action menu.
3. Configure the permissions as necessary.
4. Click **Save**.

Edit an Assignment Type

To edit an assignment type

1. Go to **Manage Center > Talent > Competency Manager > Assignment Types**.
2. Locate the appropriate assignment type and select Edit Assignment Type from the action menu.
3. Make edits as necessary.
4. Click **Save**.

Delete an Assignment Type

To delete an assignment type

1. Go to **Manage Center > Talent > Competency Manager > Assignment Types**.
2. Locate the appropriate assignment type and select Delete Assignment Type from the action menu.
3. Click **OK**.

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. 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 Manager > Competency Models** and click **Groups**.

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.

> To analyze the Job Profile Competency Quota in the Manage Center you must have unrestricted access to the Job Profile Competency Quota Analytics feature in System Roles (Manage Features > Compliance Analytics).

Analyze 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. Click the **Exclude Closed Accounts** checkbox to exclude accoutns that are closed from the analysis.
6. 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.

About the 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.

Selected Job Profile Group(s): Admin Group

COMPETENCY	COMPETENCY QUOTA	# WITH COMPETENCY	# IN TRAINING	TARGET LEVEL	SUZIE SMITH(ACADEMY_LEARNER1)	SUJATHA BULUSU(NETD_SUJATHA)	DIANE JONES(DIANEJ7080)
Job Profile: Admin							
People management1 (People management1)		0	0	Proficiency 1 | 5	Revoked	Revoked	Revoked
Employee Basics (BASIC)		1	0		Revoked	Revoked	4 | 5

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 for each user in the selected group. 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.
  - If the user has had a Competency revoked, this will be indicated in the user column.
  - Administrators with the appropriate permissions can assign training, award competencies and revoke competencies from the user column. These links display as icons in the column. The ☐ icon is used to award the Competency, the ⊘ icon is used to revoke the Competency, and the icon is used to enroll the user in training. The 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.

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.

Import Job Profile Data via the 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.

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

Create the CSV Import File

You have two options for creating a CSV Import File.

- Run report *R419 – Job Profile Export in CSV Data Uploader Format* to export existing job profiles for editing outside of the LMS.
- **Download the CSV template** :

  1. Go to **Manage Center >Talent > Job Profile Data Loader**.
  2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Job Profile Data Loader Field Reference for detailed information about the fields.

When adding a new job profile, the mandatory fields are:

- JobProfileReferenceCode
- JobProfileName

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

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).

Import the Job Profile Data

To import job profiles

1. Go to **Manage Center > Talent > Job Profile Data Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. 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.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. 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.

Import Job Profile Assignments via the 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.

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

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.

Create the CSV File

You have two options for creating a CSV Import File.

- **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.
- **Download the CSV template**
  1. Go to **Manage Center > Talent > Competency Data Loader**.
  2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Job Profile Assignment Data Loader Field Reference for detailed information about the fields.

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).

Import Job Profile Assignments

To import job profile assignments

1. Go to **Manage Center > Talent > Job Profile Assignment Data Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. 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.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. 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.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. 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.

Create and Manage Job Profile Custom Attributes

Job profile custom attributes provide you with the ability to capture job profile information that is custom to your organization and to filter LMS data based on the attribute. These are custom attributes that are applied at the job profile level, further describing the competency. These attributes will apply to all users with the competency. These are applied at the assignment type level, further describing the assignment type for a given user's job profile. The attributes apply to the assignment type added for one user and one job profile.

> To create and manage competency custom attributes, your role must have unrestricted access to the Job Profile Attributes permission (System Roles > Manage Features > Competency Manager Features)

Create a Job Profile Attribute

1. Go to **Manage Center > Talent > Competency Manager > Job Profile Attributes**.
2. Click **+ Create Job Profile Attribute**.
3. In the **Details** section, enter values in the **Attribute Code** (required) and **Name** fields.
4. Select the field type from the drop-down options. This determines the values that can be assigned to the attribute.
    - 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). Note: You will need to save the attribute before you can add values to the drop-down 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)
5. In the **Display Area Settings** section, choose where the attributes will be displayed in the system.
    - **Learning Path** - displays the attribute in the **Job Profile Summary** page in the learning path.
    - **Job Profile Details** - displays the attribute in the when a user views a job profile's details.

6. Click the **Permissions** button to set the permissions for the attribute. Users with read-only access can view the attribute. Users with unrestricted access can view and edit the attribute.
7. Click **Save**. The attribute is added to the list.

To edit, delete or update the permissions only for a job profile attribute, locate the attribute in the list and select the appropriate option from the action menu.

Managing Attribute Values in the Job Profile

Job profile custom attributes are displayed along with the standard fields and attributes in the job profile. Users with unrestricted access to the job profile can set the values for the attribute.

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Locate the appropriate job profile. Click on the action menu and select **Edit job profile**.
3. Locate the appropriate custom attribute and set the value. Custom attributes are located below the **Start Date** and **End Date** in the **Job Profile Details** section.
4. Click **Save**.

Create and Manage Job Profile Assignment Type Custom Attributes

Job profile assignment custom attributes provide you with the ability to capture job profile assignment information that is custom to your organization and to filter LMS data based on the attribute. These are custom attributes that are applied at the assignment type level, further describing the competency. These attributes will apply to all users with the competency. These are applied at the assignment type level, further describing the assignment type for a given user's job profile. The attributes apply to the assignment type added for one user and one job profile.

> To create and manage competency custom attributes, your role must have unrestricted access to the Job Profile Assignment Type Attributes permission (System Roles > Manage Features > Competency Manager Features)

Create a Job Profile Assignment Type Attribute

1. Go to **Manage Center > Talent > Competency Manager > Job Profile Assignment Type Attributes**.
2. Click **+ Create Assignment Type Attribute**.
3. In the **Details** section, enter values in the **Attribute Code** (required) and **Name** fields.
4. Select the field type from the drop-down options. This determines the values that can be assigned to the attribute.

    - 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). Note: You will need to save the attribute before you can add values to the drop-down 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) **Note**: Selecting this field currently has no impact; future development may remove or change this option.

5. In the **Display Area Settings** section, choose where the attributes will be displayed in the system.
    - **Learning Path** - currently, these attributes cannot be displayed in the learning path, therefore selecting this field has no impact.
    - **Job Profile Details** - displays the attribute in the when a user views a job profile's details.
6. Click the **Permissions** button to set the permissions for the attribute. Users with read-only access can view the attribute. Users with unrestricted access can view and edit the attribute.
7. Click **Save**. The attribute is added to the list.

To edit, delete or update the permissions only for a job profile assignment type attribute, locate the attribute in the list and select the appropriate option from the action menu.

Managing Attribute Values in the Job Profile

Users with unrestricted access to the job profile that contains the assignment type attribute can set the values for the attribute.

1. Go to **Manage Center > Talent > Competency Manager > Job Profiles**.
2. Locate the appropriate job profile. Click on the action menu and select **Edit job profile**.
3. Select **Group Assign**.
4. Locate the appropriate custom attribute and set the value.
5. Click **Save**.

Certification Properties Field Reference

Certification Details

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

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

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.

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.

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

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.

Comments	For "Add" and "Update" this is the text to describe the event.	Text
ActionRequestedBy	For "Add" and "Update" indicates the UserID for the user who requested the action (if it is being performed on a different user's behalf)	UserID
SupportingFileURL	URL to a supporting file location. It can be in the Repository or an outside location.	URL
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.

Certification History Data Loader Field Reference

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

Field	Content	Data Handling
Action (required)	Control action (Add, Delete or Update)	"A" - add "D" - delete "U" - update
Event (required)	Indicates the event that is taking place on the Certification.	"Awarded" "Expired" "Changed" "Revoked" "Self-Award Submitted" "Self-Award Denied" "Self-Award Approved"
UserID (required)	User ID of the User in the System for whom the history is being added, updated, or deleted.	UserID
CertificationCode (required)	Indicates the Certification code for the event. Note: The data loader will not add Certification codes. It must exist in the system.	CertificationCode
AwardID	The Award ID for a certification in the system; history cannot be added unless the certification has been awarded.	AwardID
ActionDate	Indicates the historical date of the action.	Date in the yyyy-MM-dd HH:mm:ss format

Comments	For "Add" and "Update" this is the text to describe the event.	Text
ActionTakenBy	For a "Add" and "Update" indicates the UserID for the user who is performing the action.	UserID
ActionRequestedBy	For "Add" and "Update" indicates the UserID for the user who requested the action (if it is being performed on a different user's behalf)	UserID
SupportingFileURL	URL to a supporting file location. It can be in the Repository or an outside location.	URL

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.

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)

Competency Details Field Reference

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

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

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

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

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

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

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.

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.

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.

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).
CP-CP_APP	The Competency Attribute Code entered when the attribute was created.	Enter attribute code (text)

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.

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.

Competency History Data Loader Field Reference

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

Field	Content	Data Handling
Action (required)	Control action (Add, Delete or Update)	"A" - add "D" - delete "U" - update
Event (required)	Indicates the event that is taking place on the competency.	"Awarded" "Expired" "Changed" "Revoked"
UserID (required)	Indicates the UserID that the event applies to.	UserID
CompetencyCode (required)	Indicates the competency code for the event. Note: The data loader will not add competency codes. It must exist in the system.	CompetencyCode
ActionDate	Indicates the historical date of the action.	Date in the yyyy-MM-dd HH:mm:ss format
Comments	For "Add" and "Update" text comments regarding the event.	Text
ActionTakenBy	For "Add" and "Update" indicates the UserID who is performing the action.	UserID
ActionRequestedBy	For "Add" and "Update" indicates the UserID for the user who requested the action (if it is being performed on a different user's behalf)	UserID
SupportingFileURL	For "Add" and "Update" URL to a supporting file location. It can be in the Repository or an outside location.	URL

ProficiencyLevelCode	For "Add" and "Update" The code for the competency proficiency level to be assigned.	Code

Job Profile Details Field Reference

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

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.

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.

Notification Settings

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.

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.

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.

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.
JobProfileAssignmentNotificationForAssignee	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 comtains any spaces. • *NOMAIL* for the *Do not send* option
JobProfileAssignmentNotificationForDirectAppraiser	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 comtains any spaces. • *NOMAIL* for the *Do not send* option

JobProfileAssignmentNotificationForJobProfileOwner	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
JobProfileDeAssignmentNotificationForAssignee	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 comtains 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 comtains 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 comtains any spaces. • *NOMAIL* for the *Do not send* option
JobProfileOwnerAssignmentId	Job Profile Owner Assignment ID	Assignment ID of the owner (maximum 255 characters).

CP-CP_APP	The Job Profile Attribute Code entered when the attribute was created.	Enter attribute code (text)

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.

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.
CP-CP_APP	The Job Profile Assignment Type Attribute Code entered when the attribute was created.	Enter attribute code (text)

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.

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.

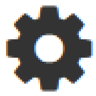
Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

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.

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.

Attribute Option Values

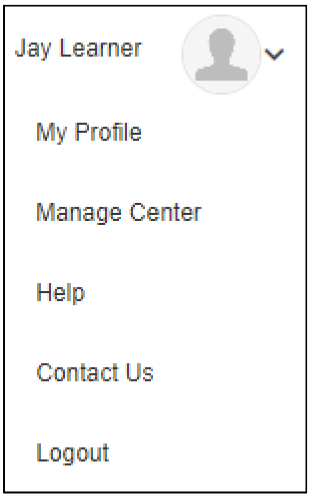
You can configure the options for drop-down list attributes.

Table: Attribute option fields

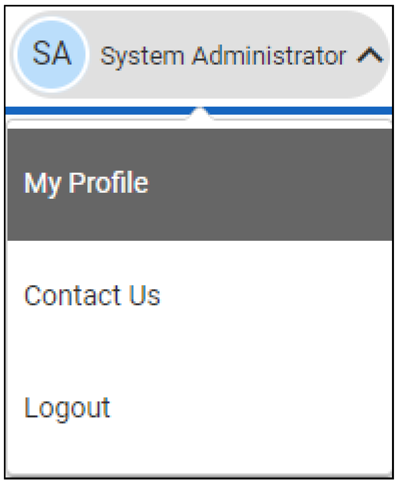
Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look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

Avatar Menu

Avatar Menu



Avatar Menu Icon (legacy UI)



Avatar Menu Icon (Responsive UI)

Figure: Comparison of Avatar Menus

The Avatar menu is a drop-down list from which users can select an action (for example, log out, access their profile).

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 button 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

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

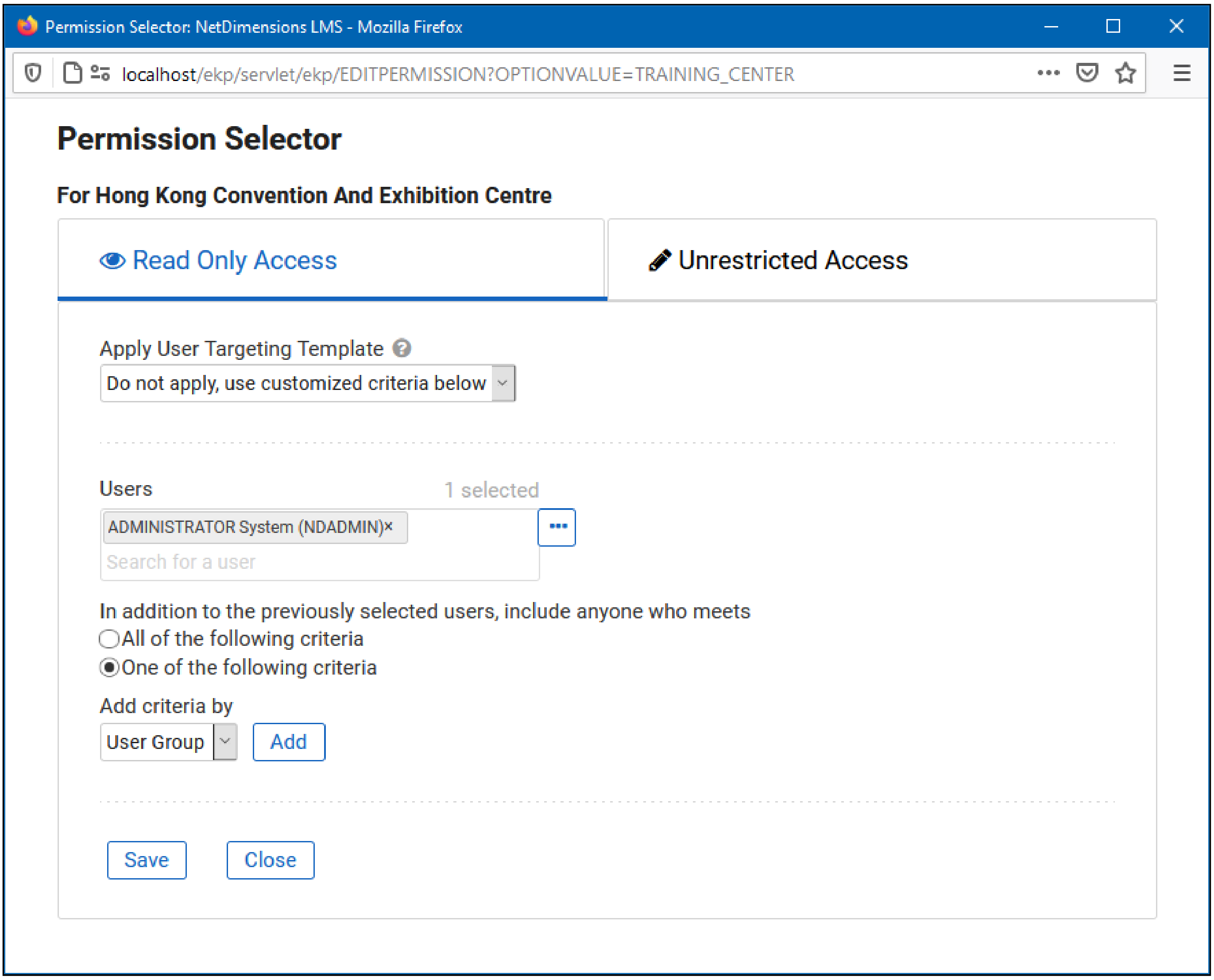


Figure: Permission Selector for Read Only Access to a Training Center

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

The Repository Manager

The PeopleFluent Learning Repository serves as a platform where organizations can add and manage files that are accessible across the system. These could include course materials for both learners and instructors, certificates, details about courses or training centers, and images utilized in course catalogs.

This content is administered in the Repository Manager. Here, an administrator can organize and manage uploaded files. Repository Manager has two areas:

- **Personal Folders** lists the folders and files you have created.
- **Shared Public Folders display the folders and files that fellow administrators have generated and shared with you.**

> To perform these tasks, you must have *Repository Manager* feature in System Roles (Manage Features > Manage Features)

Create a Repository Folder

Repository content is organized in folders. As an administrator adding content, you will create additional folders in the Personal Folders area. Once a folder is created, you can define its access permissions so other LMS users, including learners, can access it.

> When determining the folder structure, considering how you intend to arrange your files can be beneficial. For instance, organizing them by department, course, or organization.

To create a new folder

1. Go to **Manage Center > Learning > Repository > Repository Manager**.
2. Click **Create folder**.
3. Enter a folder name and description(optional).
4. Click **Create**.
5. To set permissions for the folder:
    a. Click the Permissions link.
    b. Select users and/or user groups to grant read only or full access permissions for the folder.
    c. Click Save.

6. By default, all sub-folders and content within the folder will inherit the folder's permissions. To change this,

    a. Click the Properties link.
    b. Clear the Folder permissions are inherited by subfolders..
    c. Click Save.

6. Click **Back to Repository**. The new folder is added to the list. Note: You may need to click **Refresh** to see the new folder in the Folders tab.

Upload a File to the Repository

In addition to uploading single files, you can upload multiple files in a zipped folder. When you upload the file, the system recognizes it as a ZIP file and prompts whether you wish to extract its contents. Note: All files extracted will have the same description (the filename) so you may want to update the descriptions individually.

You can also configure access permissions for files independently of those configured for the folder containing the file. To do this, be sure that the folder is not configured to force all content to inherit permission settings.

> Uploading the same file more than once does not replace its previous versions, as all files have unique internal filenames in the LMS. To replace a file, see **Replace a File in the Repository** below.

To upload a file to the repository

1. Go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.
2. Click the folder you want to upload the file to. The folder's Overview page opens, where you can see its files and sub-folders.
3. Click **Upload**.
4. Click **Choose File** to select a file to upload.
5. Optionally, enter a description for the file. The description appears only in Repository Manager.
6. Click **Upload**. The Upload Results page opens.
7. Click **OK** to complete the upload, or **Cancel Upload** to cancel it.

Replace a File in the Repository

You can replace an existing file in the repository with a new file, and all references to the original file are updated to reference the replacement file.

To update a file with a new version, you must use the Replace function, not the Upload function. Uploading the same file more than once does not replace its previous versions, as all uploaded files are assigned unique internal filenames in the LMS. Replacing a file keeps its unique identifier.

> When you replace a file the LMS does not update the original file's name. If your replacement file has a different filename, and you want to use the new name in the LMS, you can change the file's name by updating its properties.

To replace a file with a new version

1. Go to **Manage Center > Learning > Repository > Repository Manager**.
2. Click the folder containing the file you want to replace.
3. Select the check box of the file you want to replace and click **Replace**.
4. Click **Choose File** to select a file to upload, replacing the original file.
5. Click **Upload**. The Upload Results page opens.
6. Click **OK** to complete the upload, or **Cancel Upload** to cancel it.

Configure File Access Permissions

If you have updated a folder's properties so that its files and sub-folders do not inherit its access permissions, you can configure the access permissions for its files and sub-folders individually. Remember that you must configure Read Only access for a file or its parent folder so that other LMS users, including learners, can access it.

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission on the file can set the access permissions for it.

To set the access permissions for a file

1. Go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.
2. Click the **[Properties]** link of the folder containing the file or sub-folder you want to set access permissions for. The folder's Overview page opens.
3. Clear the **Folder permissions are inherited by subfolders** check box if it is selected.
4. Click **Back to Repository** to return to the folder.
5. Click the **[Properties]** link of the file you want to set access permissions for. The file's Overview page opens.
6. Click **Permissions**. The Permissions Selector opens in a new window.
7. Assign the Read Only and Unrestricted Access permissions as required. For example, to enable all learners to view the file, in the Read Only tab add the Role criteria and select

the Learner role. When you save the permissions, the Permissions Selector closes and you are returned to the File's Overview page.

8. Click **Save**.

Transcript Detail Visibility

The data access control *Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail* controls the reviewer's view of the transcript detail for those being reviewed. By default, only the System Administrator role has this access enabled.

An administrator can grant differing access to the transcript detail of those being reviewed to reviewers, direct appraisers, and instructors from the Organization Maintenance page. Similar to the *Level of Visible Transcript Detail for learners* option in System Configuration, the levels of transcript detail visibility can be set to:

- Completion Status Only
- Details and Overall Progress
- Details, Overall Progress, and Individual SCO Progress

  Shareable Content Object. These are the individual, reusable learning components within a SCORM package.
- Details, Overall Progress, Individual SCO Progress, and Course Interactions

The Transcript Detail page is not accessible from the Records/Transcript page for users with their visibility level set to *Completion Status Only*.

Users with visibility level set to any of the other options above have access to the Transcript Details page to view more transcript detail. Additionally, users with *Details, Overall Progress, Individual SCO Progress, and Course Interactions* have full access to all information on the Transcript Details page.

If a reviewer can view full transcript details, they can also open the Transcript Details page by clicking the course title links. In the Active/Archive Course areas of the Teach menu, full transcript detail is always displayed except when a transcript is in Pending Approval or Waitlisted status in User Review. The level of transcript detail available under the Administrative Access area is controlled by the same rule as the CDC.

Instructors are usually able to see full transcript details. However, in some highly regulated countries, even instructors are not allowed to have access to transcript details like question responses and scores. In cases like this, the LMS has a feature to control the level of transcript details instructors can view, which is configurable at the organization level. This setting complements the other two options that apply to the direct appraiser or to reviewers in general.

When the reviewer is both an instructor of the course and the direct appraiser of the learner, whichever has the greater level of visibility is granted to the reviewer.

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.

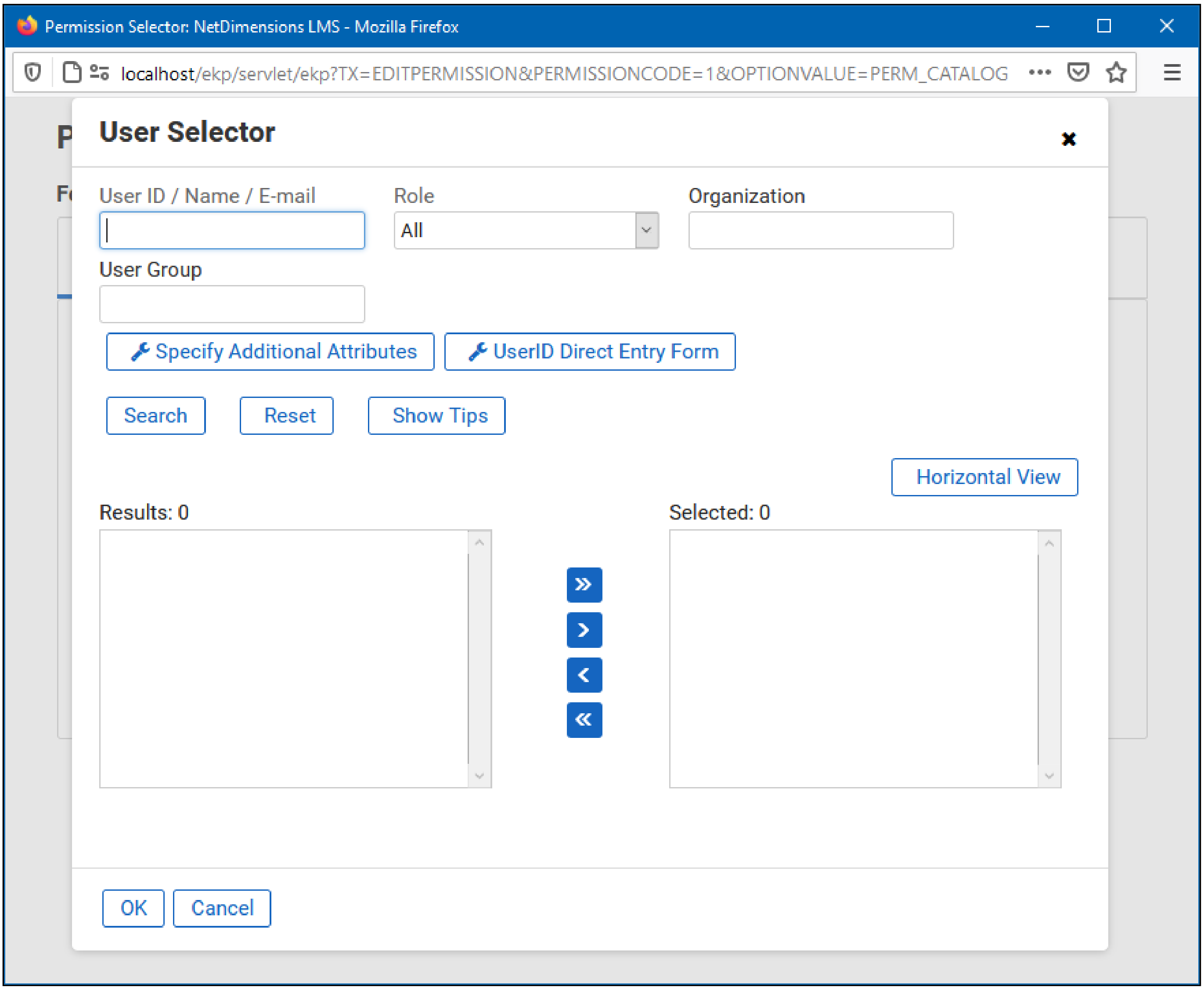


Figure: User Selector Accessed from the Permission Selector

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

Permissions

About User Targeting Templates

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