Competency Basics Guide

Version 1.1
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01
Introduction

Overview

*Competency Basics* is a new module in the Enterprise Knowledge Platform 4.0 release. Its focus is on providing the essential training and course tracking requirements for learner job assignments and learning paths, and complements the current catalog, management review, and reporting functionality already provided within EKP. It leverages the existing training data contained within EKP to provide a seamless, tightly integrated view of learners training requirements and progress.

There are two essential components in *Competency Basics*:

- The **Competency Center**, which is a new environment for learners (and managers) that consolidates their view of certifications, training plans, job profiles, and competencies, thus providing a single view of where their training needs are in relation to desired training outcomes. Besides summarizing current status, the *Competency Center* also allows the user to self assign competencies and to identify the training gap between their currently completed requirements and those that are a part of their overall plan (or the training gap for other related job plans). See Figure 1.

- The **Competency Editor**, which is the administrator’s tool to define job profiles, competencies, learning requirements, and the associations between these elements. Additionally, various reports may be run from here, including queries and ranking of users according to desired combinations of competencies.

The following sections provide a more detailed description of the flexibility and capability of the key areas of the Competency Basics implementation.

Audience

This document is intended for those who want an overview of the new Competency Basics system. It is not intended as a reference guide or tutorial.
Functions included in the Competency Center are:

- Summary (shown above) of all assignments;
- Assigned Job Profiles, with additional description and requirement details;
- Completed Competencies; with additional description and requirement details;
- Certificates Achieved;
- Training Plan;
- Training Gap Analysis, to examine the gap between the current training history and the required courses for selected Job profiles.

Managers may review a user’s Competency Center and so have the same view of information, but the manager screens also provide update buttons to allow assignments and comments to be added to the user view.
Terminology

Before the capabilities of the system are discussed, there are a few basic terminology issues to clarify.

- **Job Profile**, which is the key mechanism for defining an expected learning path for learners (actually, some texts prefer the term Learning Path instead of Job Profile). Expected job training requirements are defined as a set of specific competencies (which is explained below), and may be at as high or low a level as makes sense within a given organization.

  For example, a job profile could be *Assistant Office Administrator* that requires three competencies: *Microsoft Word Processing (Advanced)*, *Memo Basics*, and *Time Management*. Each of these competencies has their own training or completion requirements that are consolidated into a single job profile view to the learner.

  In summary, a job profile is a collection of competencies that may be assigned to a user. Users may be assigned multiple job profiles (for example, *Cabin Crew* and *Safety Officer*).

**Sample Job Profile Map**

<table>
<thead>
<tr>
<th>Job Profile</th>
<th>Required Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Office Administrator</td>
<td>Microsoft Word Processingf</td>
</tr>
<tr>
<td></td>
<td>Memo Management</td>
</tr>
<tr>
<td></td>
<td>Time Management</td>
</tr>
<tr>
<td>Branch Manager</td>
<td>Advanced Accounting</td>
</tr>
<tr>
<td></td>
<td>Time Management</td>
</tr>
<tr>
<td></td>
<td>English Speaker</td>
</tr>
<tr>
<td></td>
<td>People Management</td>
</tr>
</tbody>
</table>
• **Competency**, which provides a means to associate specific training requirements with specific areas of expertise or training. For example, a competency may be *Microsoft Word Processing*, which requires that you take and complete the two on-line courses *Introduction to MS Word* and *How to Write Memos*.

So, a competency is a specific set of requirements (which are generally course completion-based, but in the future will also include other types of assessments). Competencies are usually used within job profiles, but individual competencies may also be directly granted to users (for example, English Speaker).

### Sample Competency Training Map

<table>
<thead>
<tr>
<th>Job Profile</th>
<th>Required Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Word Processing</td>
<td><em>Introduction to MS Word (WRD101)</em></td>
</tr>
<tr>
<td></td>
<td>How to Write Memos (MEM177)</td>
</tr>
<tr>
<td>Time Management</td>
<td>Basic Time Management (TIM722)</td>
</tr>
<tr>
<td></td>
<td>Decision Priorities (DSS333)</td>
</tr>
<tr>
<td>English Speaker</td>
<td>(no course requirements)</td>
</tr>
<tr>
<td>Japanese Speaker</td>
<td>(no course requirements)</td>
</tr>
<tr>
<td>People Management</td>
<td>Company Staffing Guideline (CLS202)</td>
</tr>
<tr>
<td></td>
<td>How to Manage People (MGM477)</td>
</tr>
</tbody>
</table>

### Changing Terminology

In the world of competency management and skills gap analysis, there are certain connotations associated with the terms Job Profile and Competency that may not fit with a given organization's intended use.

To make it more straightforward to deal with such issues, EKP maintains text for screens in separate properties files, allowing the text to be changed without requiring any special programming skills or needing to touch business logic in the LMS. This is done primarily to support multiple language interfaces for EKP, but
it also has the benefit of allowing you to change the standard terminology used within the system. For example, if you wished:

- the Job Profile object could be renamed Learning Path, and
- Competency could be renamed Training Set,

if these terms fit your internal concepts for competency management better than the defaults.
Organizing Your Requirements

Before you begin creating job profiles and competencies, you should carefully organize the information you have so that you can create a suitable structure of competencies and job profiles for your users. This document does not cover this aspect of the process as there are numerous texts available as well as your internal corporate guidelines for creating this information, but the key point is that some thought should go into the process BEFORE anything is put online for users.

To assist in the technical part of this process, Competency Basics provides several mechanisms to structure your information:

- **Job Profile Catalogs.** Catalogs provide a means to administer and deploy collections of job profiles. EKP allows you to configure permissions on these catalogs, thus enabling you to control who can edit the information in the catalog, as well as which users (as identified by organization, role, or specific user lists) can see the job profiles within the catalog.
  
  A catalog may be based on functional, geographical, or other criteria. For example, you may have a catalog entitled “New York Branch Office” if your focus is geographical, or “IT Positions” if it is functional.

- **Competency Catalogs.** Similar to the job profile catalogs, competencies are also organized into catalogs which allow permissions to be configured. Here, it makes sense to set up permissions to allow competencies to be shared across multiple administrator. Sample competency catalogs might organize competencies into groups such as:
  
  - Management
  - Office
  - Programming
  - US Tax Law
  - Safety
There are several important rules followed by EKP in providing these organizational structures:

1. The permissions on the catalogs control who can edit the contents, as well as which users can see the contents in the Competency Center. Administrators see the catalogs, but users do not, since for users they access information according to the categories.
2. The categories have no permissions associated with them and are there only to make it easier for users and managers to select and assign items to their training plan. Categories are not restricted to a particular catalog.

The Competency Editor

To setup competency requirements for EKP, a new Competency Manager function has been created, with its key component being the Competency Editor. This editor allows you to create job profiles, competencies, and catalogs, as well as run reports and associate learning modules with the competencies.

A sample screen shot is shown in Figure 2.

Figure 2 – Competency Editor
Functions in the Competency Editor include:

- Searching;
- Creating and editing Job Profiles, Competencies, Competency Groups;
- Creating Job Profile Catalogs, Competency Catalogs;
- Reporting;
- User Ranking
- Help
Competencies

A competency has a number of attributes associated with it, as shown by the sample screen snapshot in Figure 2. Several of these are important in understanding how you may apply competencies in your environment, and so are explained in a bit more detail below.

1. The assignment indicators. Competencies may be self-assigned, manager assigned, automatically assigned, or any combination of the above.
   a. **Self-assignment** means that the user is able to select the competency and add it to their assigned (e.g. completed) competency list. An example of a self-assignment competency, with no course requirements, might be *Japanese Speaker*, where staff who have this ability could simply add it to their competency inventory.
   b. **Manually assigned** means that reviewers, particularly managers or administrative staff, may assign the competency to learners. A competency that requires an external examination would be such an example where this makes sense. Managers are typically able to do this through the REVIEW menu.
   c. **Automatic assignment** means that EKP will add this competency to the user's competency list once the requirements are completed. For learning object requirements, this means that the overall status changes to COMPLETE at some point in its lifecycle. EKP scans through the list of completed courses each night and determines which user competencies may now be marked completed.

2. The competency requirements. In the first version of Competency Basics, EKP allows you to select zero or more courses as a part of the completion criteria. Later, certifications and assessments may also be specified.

   There are some non-obvious combinations of completion criteria that are of interest to administrators. For example, as of EKP 4.0, a test may be created as an on-line module, thus by assigning such a module as the completion criteria, you are in essence specifying a test result for the competency requirement.

   A competency with zero course requirements will only be useful if it is directly assigned to a user, either through self-assignment or manager assignment, as EKP will never have any internal criteria to evaluate to determine if it should be auto-assigned.
Competencies Groups

A Competency Group is simply a set of competencies that have been put together to minimize the effort required to make competency assignments. This is their only function within EKP.

For example, it would be useful to create a general group called Management that consists of a frequently referenced set of individual competencies that are used again and again with multiple management related job profiles. Thus, the group could be selected and assigned to the profile instead doing this for each competency repeatedly, thus reducing the administrative work to setup these job profiles.

Job Profiles

Job Profiles are actually a simple to define element within the Competency Editor. Other than the basic name and description, is primary properties are the list of competencies with which it is associated.

In the current edition of EKP, job profiles are assigned to users by a manager or administrator – the users may not select their own job profiles, although they may query the training gap between their current training history and the requirements of a specific job profile not yet assigned to them. This query capability is only for the members of job profile catalogs for which the user has read permissions.

Training Gap Analysis

The Competency Center allows a user to query the system for a list of courses that represents the training gap between a user’s current training history and the requirements of a specific job profile.

Users may always run a query for their currently assigned job profile(s), but other job profiles may be selected only if the user has permissions (as determined by the Job Profile Catalog permissions settings).
User Ranking

The User Ranking function in the Competency Editor is an administrator function that allows you to search for and rank users according to how many of a set of competencies they may satisfy. For example, say you want to find out which users satisfy the following competency requirements:

- Spanish Speaking
- Project Management
- Java Experience

First, construct an ad-hoc Job Profile that contains the above three competencies. Then, use the User Ranking function to retrieve a list of users matched against this profile (VP Sales is shown in the example below). A list such as the following will be returned:

Here the percentage figure indicates the percentage of the three competencies completed by each user. To more closely examine the background of any particular user, click on the user’s name to get a review window that allows you to examine the user’s training background information.
Q. How do I restrict the list of Job Profiles that managers can assign to their staff?

Job Profiles are organized into catalogs, and these catalogs may have permissions assigned that restrict the list of choices presented to users and managers in the Competency Center drop-down lists. In particular, you can make catalogs available at the organization, role, or specific user level.

It was determined that it was not necessary to put permissions on each individual job profile or competency, as that may create too much administrative burden, but there is no technical reason this could not be done.

Q. How do I load competencies into the system – do I have to enter them one screen at a time?

As of EKP 4.5, a Competency Data Loader is provided that enables you to upload an Excel spreadsheet of competency definitions into the system.

Q. How are competencies automatically assigned?

Each night, EKP executes a task that matches competency learning module requirements with the list of completed user courses in the system’s training history tables. A user’s course is considered completed if the Overall Status is marked completed in the training history. So, if a specific competency has had all learning requirements completed, the competency is added to the users assigned competency list, and it will show up in the Competency Center with a check mark beside it. Since this task is only run once per day, there is a lag between just completed courses and the competency reporting.

Q. I want to find out which users have met a specific list of competencies, even if they have only partially completed the list. Can this be done?

The User Ranking function in the Competency Editor allows you to search for and rank users according to how many of a set of competencies they may satisfy. For combinations of competencies that do not represent an existing Job Profile, a new Job Profile should be defined to enable the query to be performed.
Q. We use the term Learning Path to denote a set of assigned courses. Can we change the system to use this term instead of Job Profile?

All screen and report text for EKP is kept in language text files that may be modified with a standard word processor. Please contact NetDimensions support for more information on how you can customize these files for your site.

Q. Where are the categories?

As of EKP 4.5, categories have been removed from the system in order to simplify the organization of information into an easier to understand catalog/object structure. Permissions are assigned at the catalog level, similar to the way in which courses are also added to catalogs and made visible via permission settings on the catalogs.

Q. When the learning requirements of a specific competency are evaluated, does it mark it completed if any of the modules have been taken, or must all be completed?

In the initial version of EKP 4.0, ALL required courses must be completed before a competency is automatically assigned to the user. A later enhancement will allow you to specific and/or combinations of learning requirements for each competency.