

# System Enhancments **Competency Management Update**

October 2021



## **How-To Guide**

The latest enhancements to the dita Platform are now live. This guide will help you manage and report on your competencies with the latest updates from dita Solutions.

> For ongoing support, contact: support@ditasoltuions.com

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### Linking a Document to a Competency - Step 1

Just as we have done with Modules, you can now link a document to a competency. In the **Competencies Tab**, simply find the competency you are wanting to link to, and select "Actions" and click on "Edit".

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0		Showing 1 to 10 of 126 Competencies						Previo







### Linking a Document to a Competency - Step 2

You will be brought to the **Edit Competency** screen, were you can link an asset to this particular competency. In this instance, we will be linking a Document. From the "Link Asset" field, select "Document" from the drop-down list

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Manager Home	2 Competencies / Compete	ncy Settings		dita Solut	ions
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mpetencies	Code Description	Blah blah blahs		Link Asset:	Document 🗸
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Help	Notify User	14     Days Before Renewal is Due       Image: Document Required     Image: Im			
D	ocument Sighting Period	Documents Require Sighting () Days (0 for Not Applicable)			
		All Admins can edit Renewal Date () Hide From User ()			





### Linking a Document to a Competency - Step 3

To link the correct document to this competency, in the "Linked Document" field, start typing the name of the document you wish to add. Documents will pre-populate based on what you have typed. Simply select the correct document and **save**.

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<ul> <li>Manager Home</li> <li>Users</li> <li>Groups</li> <li>Administrators</li> </ul>	<sup>⊗</sup> Competencies / Compete	noy Settings Ompetency	
Modules Courses Competencies Events	Competency Name * Code Description	API Competency Test 3 TEST03 API Competency Test 3	
<ul> <li>■ Resources</li> <li>▲ Library ~</li> <li>▲ Reports ~</li> <li>▲ CPD</li> </ul>	Instructions (max 255 chars)	BI⊻ Ø ≡ ≡ ■~	6
<ul> <li>Forms</li> <li>Jobs &amp; Projects</li> <li>Documents</li> <li>Organization</li> </ul>	Link Asset:	Document V	
Q <sub>€</sub> Access Licences ★ Clients	Renewal	Lead and manage organisational change (version 1.1)	
Contractors     Visitors     Help	Notify User	30 Days Before Renewal is Due	
	Document Sighting Period	Documents Require Sighting  Days (0 for Not Applicable) All Admins can edit Renewal Date  Hide From User	
		Note: If the renewal period is changed, all users who have already completed this	







### **Replacing a Linked Document to a Competency - Step 1**

In the future, you may wish to update a competency that already has a document linked to it. Do do this, you need to edit the competency, then select the **"Edit"** pencil option next to the name of the existing linked document.

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<ul><li>Visitors</li><li>O Help</li></ul>		Document Sighting Period	Documents Require Sighting       0       Days (0 for Not Applicable)
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			Note: If the renewal period is changed, all users who have already completed this competency will have their renewal date re-calculated





### **Replacing a Linked Document to a Competency - Step 2**

A warning will automatically pop up to advise that you have selected to replace a linked document. Select **"Replace Linked Document"** to proceed. Then simply select a new document by typing the document name in the **"Linked Document"** field.

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			SAVE COMPETENCY	CANCEL		







There are new statuses in the **User Competency List** which now provide an administrator greater clarity at a glace as to what is needed for a user to be "Compliant" with a particular competency.

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The **Actions** list for a user's competency has also had a revamp. Many actions were already part of the system previously, however we have streamlined the list to provide easier access to these, plus the new actions for managing compliance.

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*	Administrators		Steve Whyt	еу								
8	Modules	line	Role	🗯 Master Administrato	3							ſ
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One of the new action additions is "View Changelog". The Changelog provides approved administrators a record of all notable changes to the selected competency.

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### **User Competency Actions: Download Changelog PDF**

The Competency Changelog can also be downloaded in a PDF. This action is a new addition and can also be located in the **Competency Actions** list. Simply select **"Download Changelog PDF"**, then **"Create PDF"** from the pop-up.

<ul> <li>▲ Users</li> <li>☆ Groups</li> <li>☆ Administrators</li> <li>@ Modules</li> <li>□ Courses</li> <li>② Competencies</li> <li>☆ Events</li> <li>■ Resources</li> </ul>	User Profile Steve Whytey Role Musemame steve Email steve Employee Number 0001 Date of Birth Octo USI 4355 Position Chier operating once	gelog PDF containing the changelog for the follo : 5 CANCE	× wing competency:	CPD Period 01 Oct 16 - 30 Sep 19 CPD Units Earned O units	ACTIONS -	
i Library → III Reports → III CPD	Team TEST TEAM 1 Location Benson House Department Technology, Administration Start Date 20 Mar 2017 Telephone +61 412 274 611 International Yes			User CPD Report	🛓 Download Changelog	PDF ×
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### **User Competency Actions: View History & Actions**

At a glace, you are able to view the history of any user competency simply by selecting the **"View History"** action from the **Actions** list. From there, you can select from further options, such as viewing or downloading the change log, or editing the competency record.

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		Manual Handling			MAN1000	02 Oct 2021	02 Apr 2022
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### **User Competency Actions: Edit Competency Record**

You may find yourself in the position where an existing competency record requires editing. This can be done via the "View History" then "Edit" actions of a user's competency. From here, you can make the necessary changes to the record, which will then be visable in the **Competency Changelog**.

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### **User Competency Actions: Edit Due Date**

Where a competency is in a "**Not Compliant**" status, an "**Edit Due Date**" action has been added. This allows admin to provide extra time for a user to become compliant. Simply select "**Edit Due Date**" from the **Actions** list and update the due date.

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### **User Competency Actions: Disable User Competency**

Where a user competency is no longer required, your organisation can now **"Disable"** it from the **Actions** list. This won't delete the competency or the associated records, but will just disable them from view. Once selected, click **"Disable"** from the pop-up.

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*	Manager Home	🛔 Usera 🥢 User Profile		🔒 Disable User Competency	r	×	
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-	Groups	User Profile		Are you sure you want to disable	e this user's competency?		
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-	Resources	1. Upload Picture	Position Chie Team TES	f Operating Officer T TEAM 1			
血	Library		Location Ben	son House			
LM	Reports v		Department Tech Start Date 20 M	nnology, Administration Aar 2017			
*	CPD		Telephone +61 International Yes	412 274 611			
B	Forma		Last Logon 26 0	et. 2021 09:07 AM			
8	Jobs & Projects		Notes 1/1/	2); This is a test note			
百	Documenta	Groups Modules	Courses Competencies	Events Resources Forms	Qualifications Licences	Memberships Learning Pi	athways Socuments
盦	Organisation			Disease		chan Diaskind Companya	
a,	Access Licences	search		Elexport	U	snow bisabled Competencies	
*	Clients	Competency			Code	Completed	Renewal/Due : Date
0	Contractors	29.10 comp module				4	14 Nov 2021
E	Visitors	29.6.2019 Competency Tes	t - module 🕼 Document		Blah blah blaha	-	20 Nov 2021
0	Help	5 Star Test @ Module			001	-	20 Nov 2021
		Another Competency with a	a scorm 1.2 attached B Module		TEST02		20 Nov 2021
		API Competency Test 1	Documant		TEST01	01 Oct 2021	
		API Competency Test 3			TESTO3	01 Jun 2021	
		API Competency Test 5	Recurrent C		TESTOS	10 May 2021	13 Jul 2021





### **User Competency Actions: Re-Enable User Competency**

It's easy to re-enable a disabled user competency. In the **Competency Tab** of the user's profile, tick the **"Show Disabled Competencies"** checkbox, then select **"Re-Enable"** from the **Actions** list associated with the competency you wish to re-enable.

Manager Home						
Users	Users / User Profile					
Groups	User Profile					
Administrators		Steve Whyt	ev			
Modules		Role	Master Administrator			
Courses	1.510	Username	steve@ditasolutions.com			
Competencies		Employee Number	00001			
Events		Date of Birth USI	October 10, 1970 4352456236			
Resources	1 Upload Picture	Position Team	Chief Operating Officer TEST TEAM 1			
Library		Location	Benson House			
Reports		Start Date	20 Mar 2017			
CPD		Telephone International	+61 412 274 611 Yes			
Forms		Last Logon	26 Oct, 2021 09:07 AM			
Jobs & Projects						
Documents	Groups Modules	Courses Competen	cies Events Resources	Forms	Qualifications Licen	ices Memberships Learning Pathways D
Organisation	Search:			Export		Show Disabled Competencies
Access Licences						Beauvald
Clients	Competency				Code	Completed Date
Contractors	API Competency Test 2	Module A User disabled			TEST02	20 Jun 20
Visitors	1 Competencies(s) found					
Help						





### **New Competency Reports: Disabled Competencies**

To report on the competencies that have been disabled, you can build a **Custom Report** from the **Reports Tab**. When building the report, you will see the new filter option of **"Disabled User Competencies"** - simply choose this option, give your report a name and select the date range for the report.

# Manager Home	<b>D</b>		
Lusers	Custom Report		
🗑 Groups	Custom User Re	eport Builder	
🖈 Administrators	A		
🖉 Modules	Select the desired options to build your cust	om user report.	
Courses	Content		
Competencies	Subject of the Report	All Users 👻	✓ GENERATE REPOR
🛗 Events			
Resources	Select Content	All Competencies	
🏛 Library 🗸	Options		
🕍 Reports 🔗			
Users	Report Title	Competencies that have been disabled	
Groups	() User Filter	Disabled User Competencies	~
Modules	Date Pares	No Filter Compliant users only	
Qualifications	U Date kange	Non-Compliant users only Users nearing renewal/due date	
Licences		Users overdue renewal/due date Users nearing document sighting	
Memberships Custom Report		Users overdue document signifier Users never completed Disabled liver Compostencies	
↑ CPD			
🖹 Forms			
🚔 Jobs & Projects			
Documents			
f Organisation			
Access Licences			
* Clients			
Contractors			
Visitors			
_			



Ben Pedrazzini V dita Solutions	
dita Solutions	
(n) User Filter	Disabled User Competencies
- C	No Filter
~	Compliant users only
(1) Date Range	Non-Compliant users only
	Users nearing renewal/due date
	Users overdue renewal/due date
	Users overdue document sighting
	Users never completed
	Disabled User Competencies

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