



System Enhancements

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.

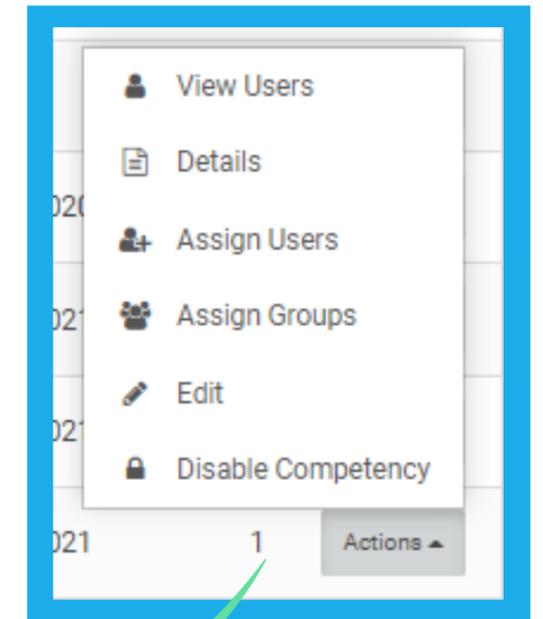
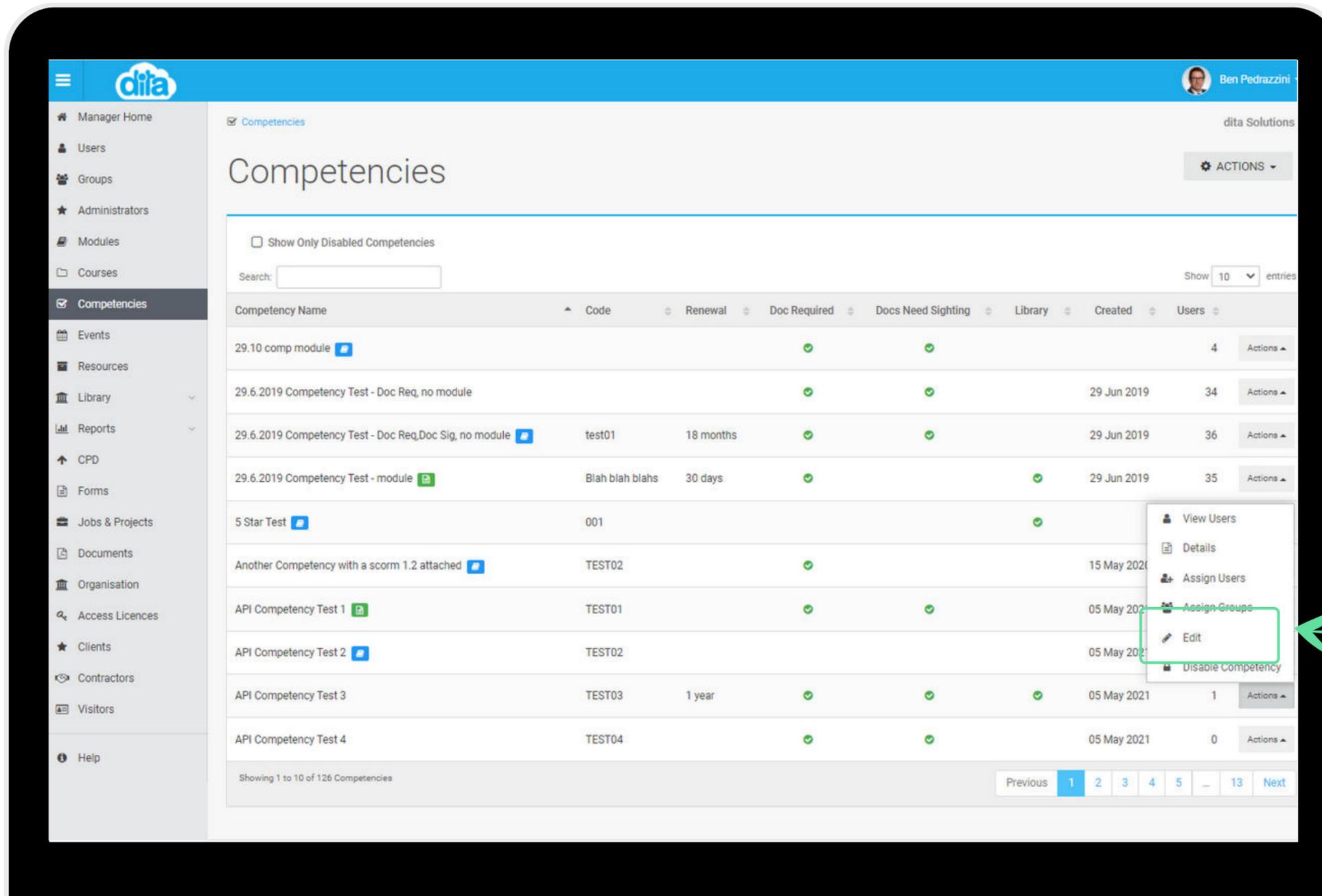
For ongoing support, contact:
support@ditasolutions.com



Linking a Document to a Competency - Step 1



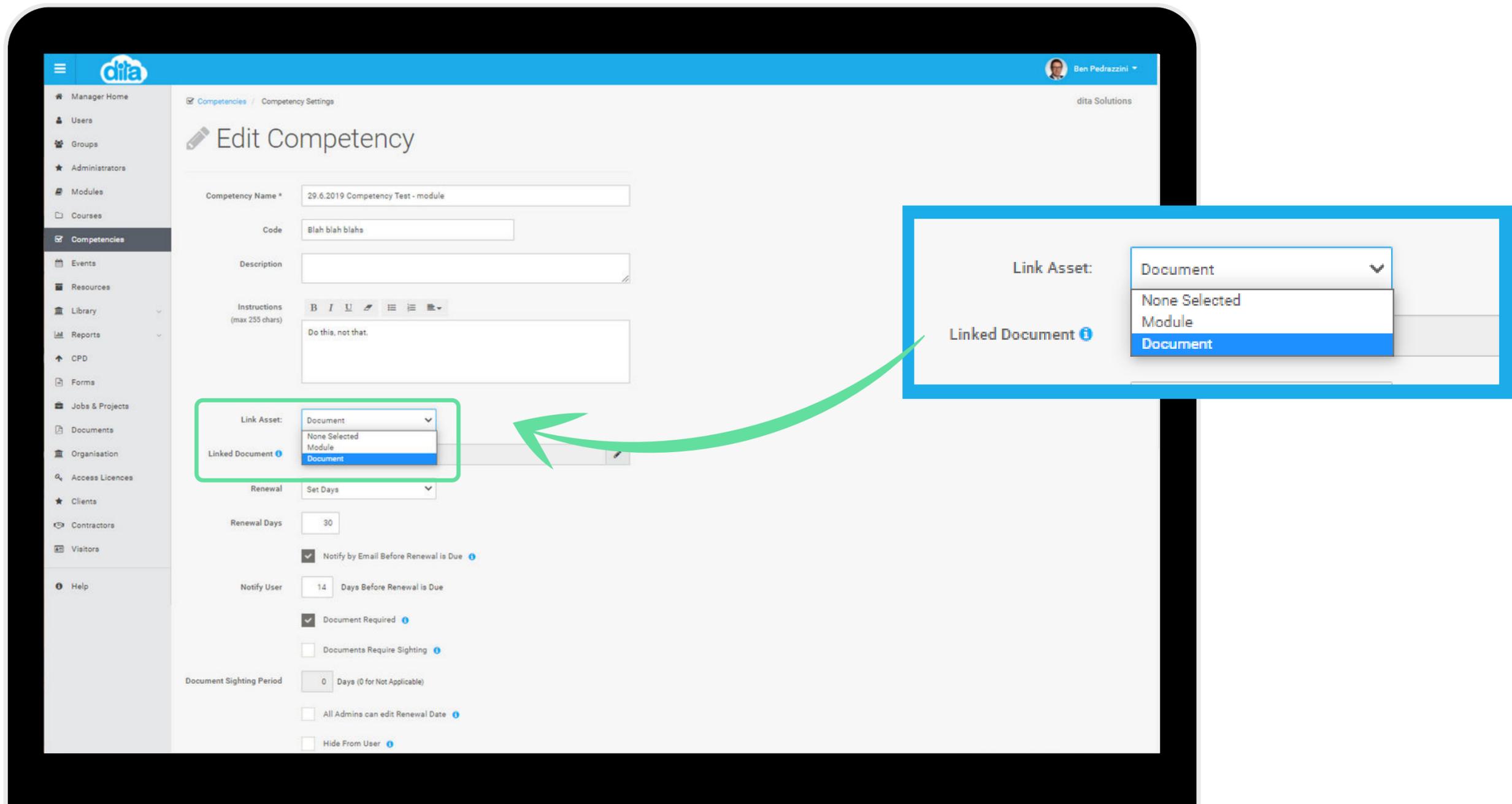
Just as we have done with Modules, you can now link a document to a competency. In the **Competencies Tab**, simply find the competency you are wanting to link to, and select **"Actions"** and click on **"Edit"**.



Linking a Document to a Competency - Step 2



You will be brought to the **Edit Competency** screen, where 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



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**.

The screenshot shows the 'Edit Competency' form in the dita system. The form includes fields for Competency Name, Code, Description, and Instructions. The 'Link Asset' dropdown is set to 'Document'. The 'Linked Document' field is highlighted with a green box, and a dropdown menu is shown with a blue border, displaying search results for 'lead m'. The dropdown menu shows the following results:

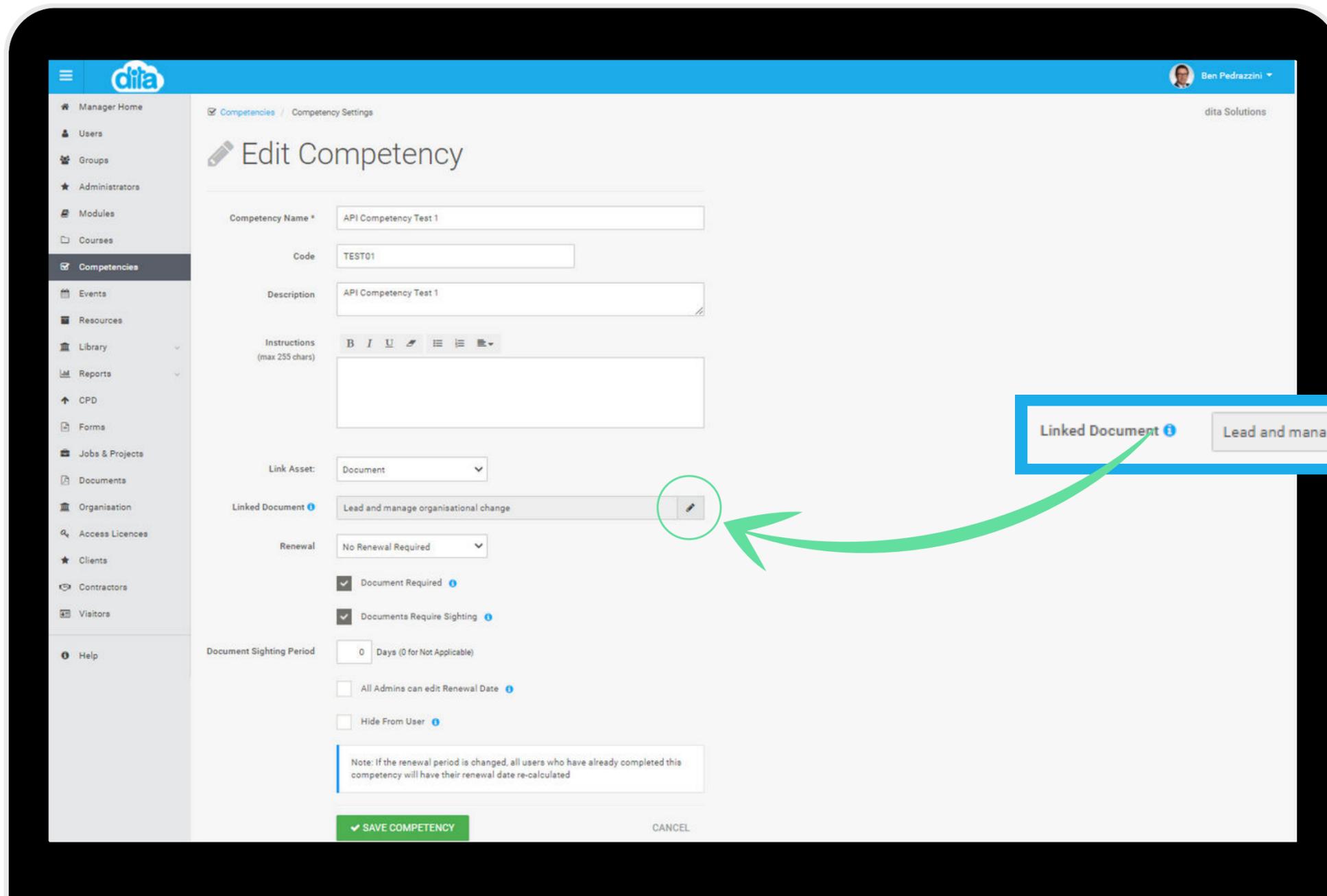
Linked Document	Renewal
lead m	
Lead and manage organisational change (version 1.1)	

The dropdown menu is highlighted with a blue border, and a green arrow points from the dropdown to the 'Linked Document' field. Below the dropdown, there are checkboxes for 'Notify by Email Before Renewal is Due', 'Document Required', and 'Documents Require Sighting'. There is also a 'Document Sighting Period' field and a note at the bottom: 'Note: If the renewal period is changed, all users who have already completed this'.

Replacing a Linked Document to a Competency - Step 1



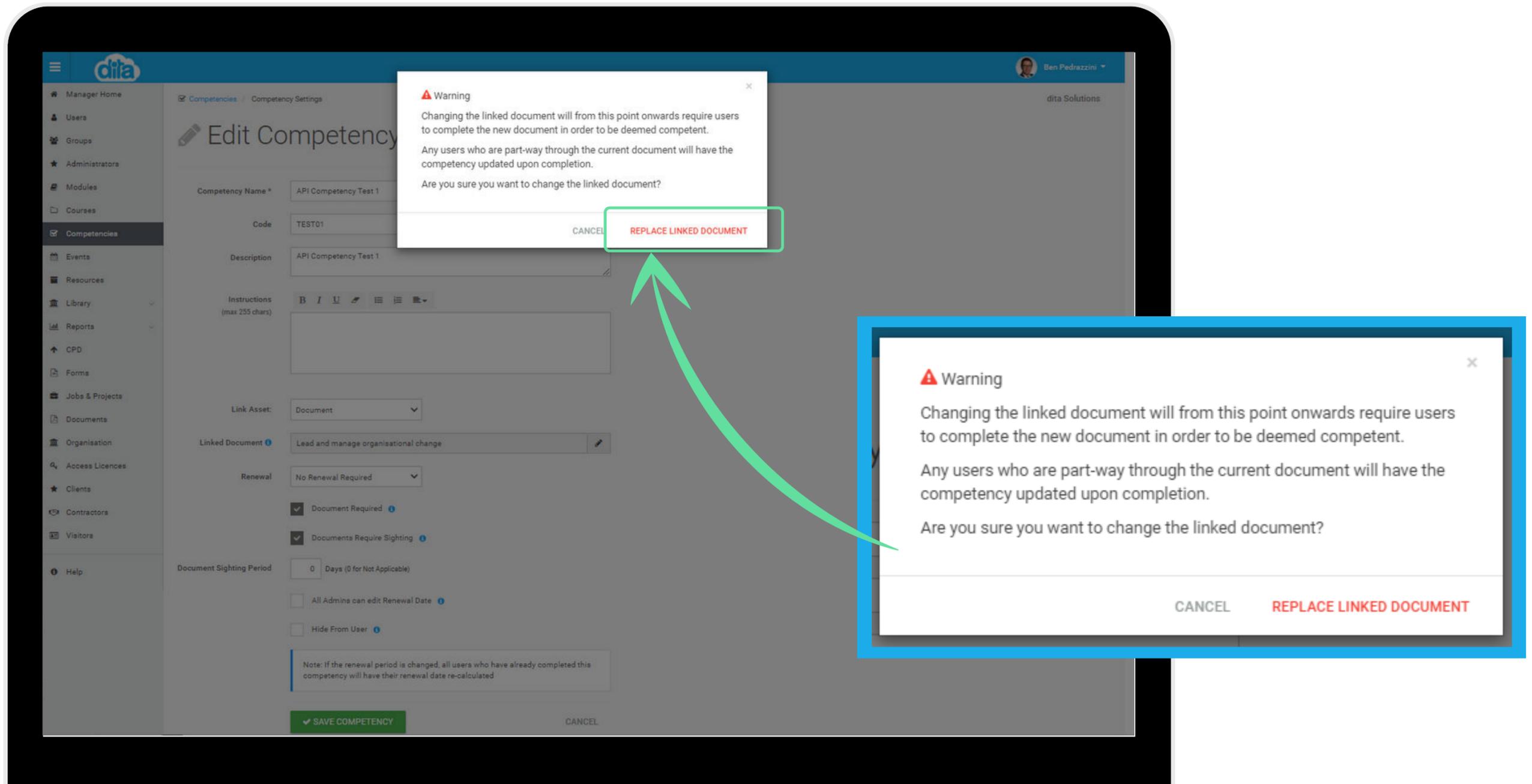
In the future, you may wish to update a competency that already has a document linked to it. To do this, you need to edit the competency, then select the **"Edit"** pencil option next to the name of the existing linked document.



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.



User Competency List: New View and Status



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

User Competency

The screenshot shows the user profile for Steve Whytey, a Master Administrator. The main section displays a table of competencies with columns for Competency, Code, Completed, Renewal/Due Date, and Status. A green arrow points from the 'Doc Sighting Required' status in the table to a detailed view of this status on the right.

Competency	Code	Completed	Renewal/Due Date	Status
Element Attached Competency Test	1111111	21 Jun 2021	21 Jun 2022	Compliant
Test Comp LP 6		05 Oct 2021	--	Compliant
API Competency Test 3	TEST03	01 Jun 2021	--	Compliant
Test Comp LP 1		14 Oct 2021	--	Compliant
Manual Handling	MAN1000	02 Oct 2021	02 Apr 2022	Document Required
Drivers Licence	Test-driver	01 Aug 2021	13 Jun 2022	Doc Sighting Required
API Competency Test 1	TEST01	01 Oct 2021	--	Doc Sighting Required
Another Competency with a score 1.2 attached	TEST02	--	20 Nov 2021	Not Compliant
API Competency Test 5	TEST05	10 May 2021	13 Jul 2021	Expired
29.6.2019 Competency Test - module	Blah blah blah	--	20 Nov 2021	Not Compliant

A vertical list of competency status labels, each in a colored box. A green arrow from the screenshot points to the 'Doc Sighting Required' label.

- Compliant
- Compliant
- Compliant
- Compliant
- Document Required
- Doc Sighting Required
- Doc Sighting Required
- Not Compliant
- Expired
- Not Compliant

User Competency List: New Actions



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.

User Competency

Steve Whytey
Role: Master Administrator
Username: steve@ditasolutions.com
Email: steve@ditasolutions.com
Employee Number: 00001
Date of Birth: October 10, 1970
USI: 4352456236
Position: Chief Operating Officer
Team: TEST TEAM 1
Location: Benson House
Department: Technology, Administration
Start Date: 20 Mar 2017
Telephone: +61 412 274 611
International: Yes
Last Logon: 26 Oct, 2021 09:07 AM
Notes: 1/1/21: This is a test note

CPD
Period: 01 Oct 16 - 30 Sep 19
CPD Units Earned: 0 units
User CPD Report

Competency	Code	Completed	Renewal/Due Date	Status	Actions
Element Attached Competency Test	1111111	21 Jun 2021	21 Jun 2022	Compliant	Actions
Test Comp LP 6		05 Oct 2021	--	Compliant	Actions
API Competency Test 3	TEST03	01 Jun 2021	--	Compliant	Actions
Test Comp LP 1		14 Oct 2021	--	Compliant	Actions
Manual Handling	MAN1000	02 Oct 2021	02 Apr 2022	Document Re...	Actions
Drivers Licence	Test-driver	01 Aug 2021	13 Jun 2022	Doc Sighting R...	Actions
API Competency Test 1	TEST01	01 Oct 2021	--	Doc Sighting R...	Actions
Another Competency with a score 1.2 attached	TEST02	--	20 Nov 2021	Not Compli...	Actions
API Competency Test 5	TEST05	10 May 2021	13 Jul 2021	Expired	Actions
29.6.2019 Competency Test - module	Blah blah blah	--	20 Nov 2021	Not Compliant	Actions

- View Document
- Replace Document
- Edit Record
- New Record
- View History
- Add Sighting
- Sighting History
- View Changelog
- Download Changelog PDF
- Disable

User Competency Actions: View Changelog



One of the new action additions is **"View Changelog"**. The Changelog provides approved administrators a record of all notable changes to the selected competency.

User Competency

The screenshot displays the 'View Competency Changelog' window for 'API Competency Test 5'. The window lists several changes made by Ben Pedrazzini on July 23, 2021. Each change entry includes a table with 'Property Name', 'Old Value', and 'New Value'.

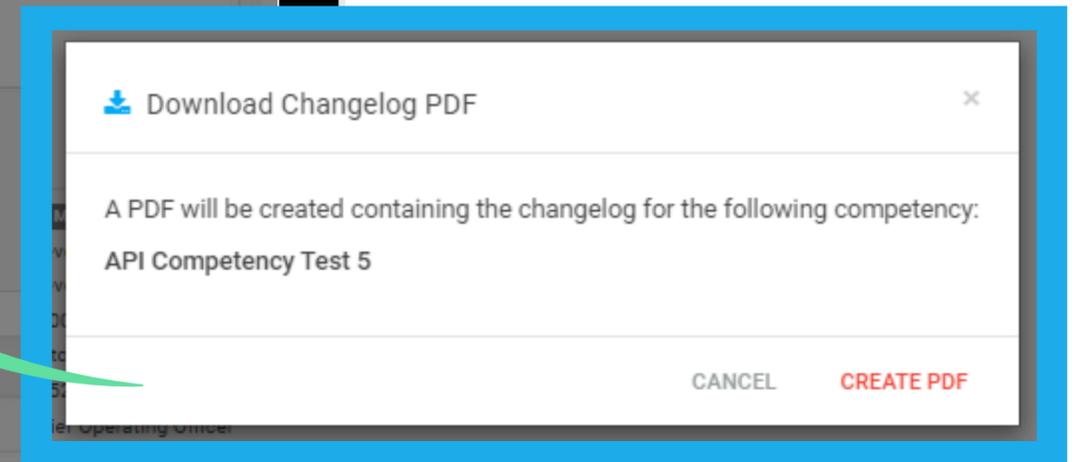
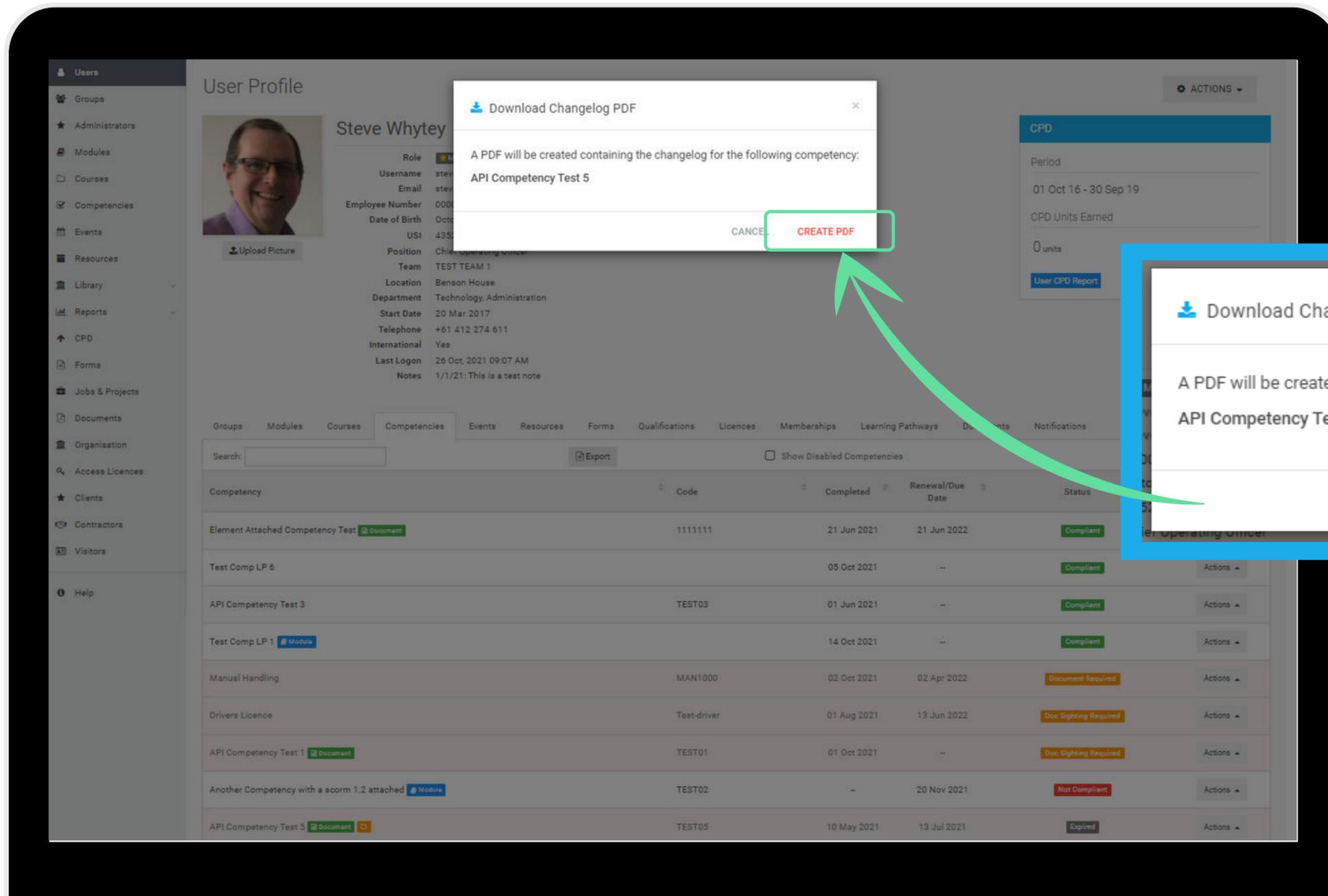
Property Name	Old Value	New Value
Document	--	ccf10042017-1.pdf
Document	65C60A7E-A4FA-7137-C453-B6CA5E671C7C.pdf	--
Result	cccc	ccccnnnnnn
Completed Date	06 May 2021	10 May 2021
Reference	test 3	test 4
Renewal Date	15 Jul 2021	13 Jul 2021
Renewal Date	13 Jul 2021	15 Jul 2021
Renewal Date	09 Jul 2021	13 Jul 2021

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.

User Competency

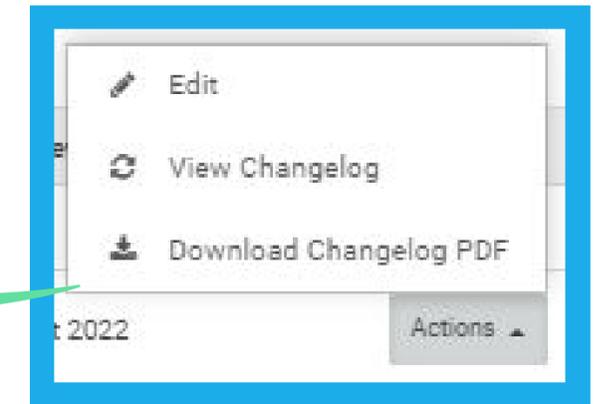
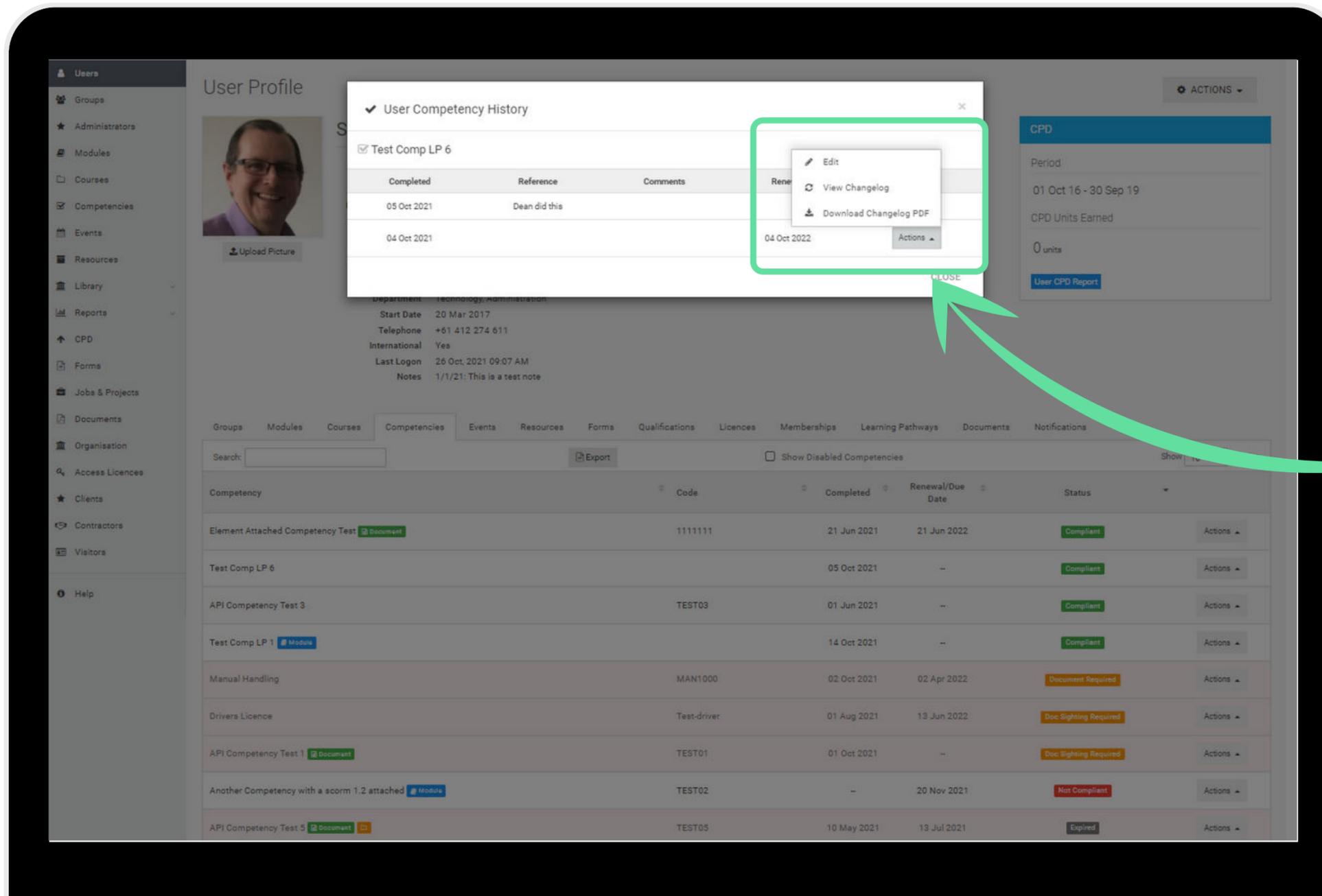


User Competency Actions: View History & Actions



At a glance, 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.

User Competency



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 visible in the **Competency Changelog**.

The screenshot displays the 'Edit Competency Record' modal for 'Test Comp LP 6'. The modal contains the following fields and options:

- Completed Date ***: 04 October, 2021
- Renewal Date**: 04 October, 2022
- Reference**: (empty field)
- Comments**: (empty field)
- Completion Record created by Ben Pedrazzini on 22 Oct 2021 11:02 AM**
- Updated by Ben Pedrazzini on 22 Oct 2021 11:03 AM**
- Upload a supporting document to be attached to all selected users (PDF, Image, Excel, Word)**
- + Select File** button
- SAVE DETAILS** button (highlighted with a green box and arrow)
- CANCEL** button

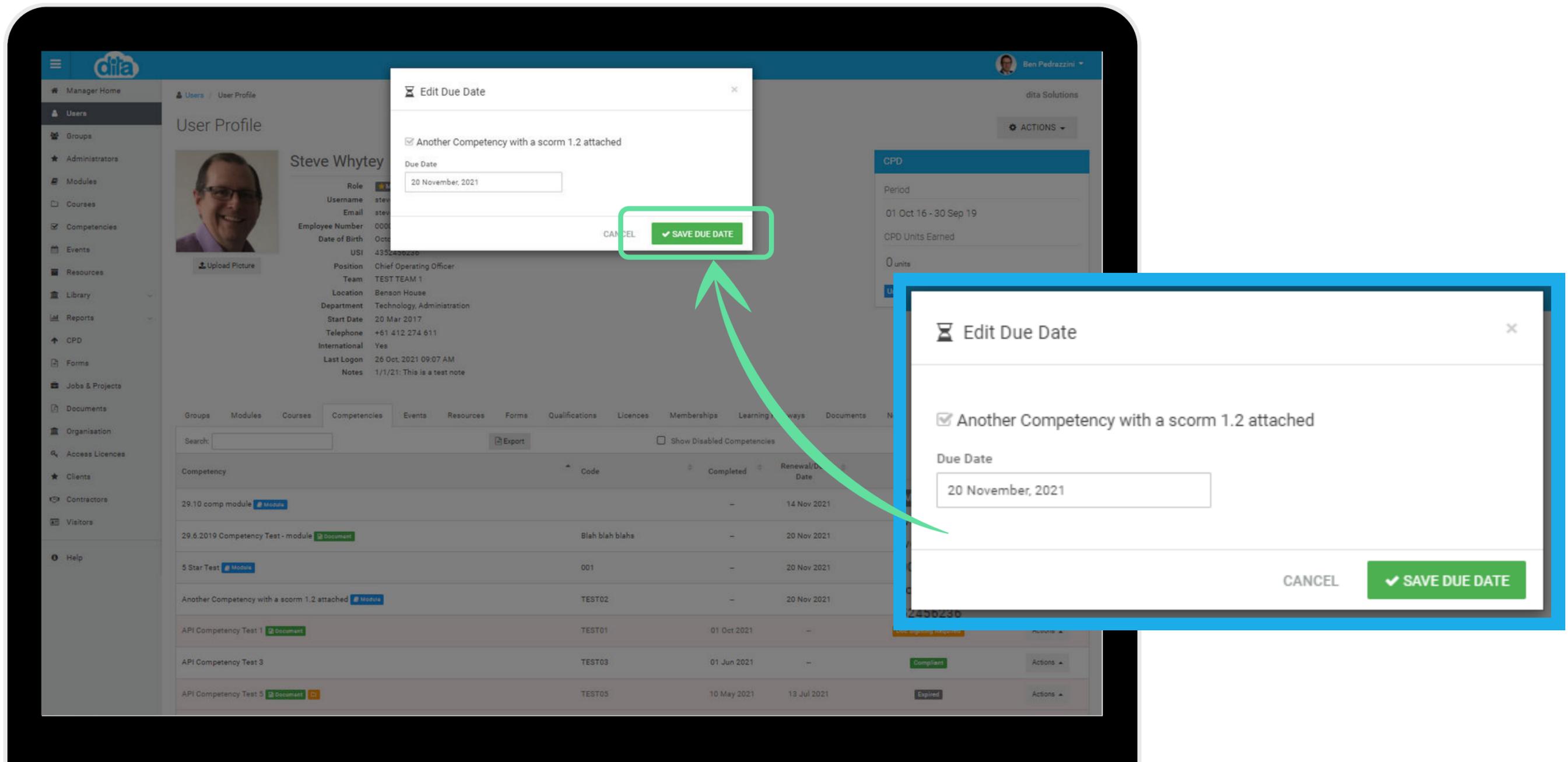
The background shows the 'User Profile' for Steve Whytey and a table of competency records. The table has columns for Competency, Code, Completion Date, Renewal/Due Date, and Status. The 'Test Comp LP 6' record is highlighted in blue.

Competency	Code	Completion Date	Renewal/Due Date	Status
Element Attached Competency Test	1111111	21 Jun 2021	21 Jun 2022	Compliant
Test Comp LP 6		05 Oct 2021	--	Compliant
API Competency Test 3	TEST03	01 Jun 2021	--	Compliant
Test Comp LP 1		14 Oct 2021	--	Compliant
Manual Handling	MAN1000	02 Oct 2021	02 Apr 2022	Document Required
Drivers Licence	Test-driver	01 Aug 2021	13 Jun 2022	Doc Signing Required
API Competency Test 1	TEST01	01 Oct 2021	--	Doc Signing Required
Another Competency with a scorm 1.2 attached	TEST02	--	20 Nov 2021	Not Compliant
API Competency Test 5	TEST05	10 May 2021	13 Jul 2021	Expired

User Competency Actions: Edit Due Date



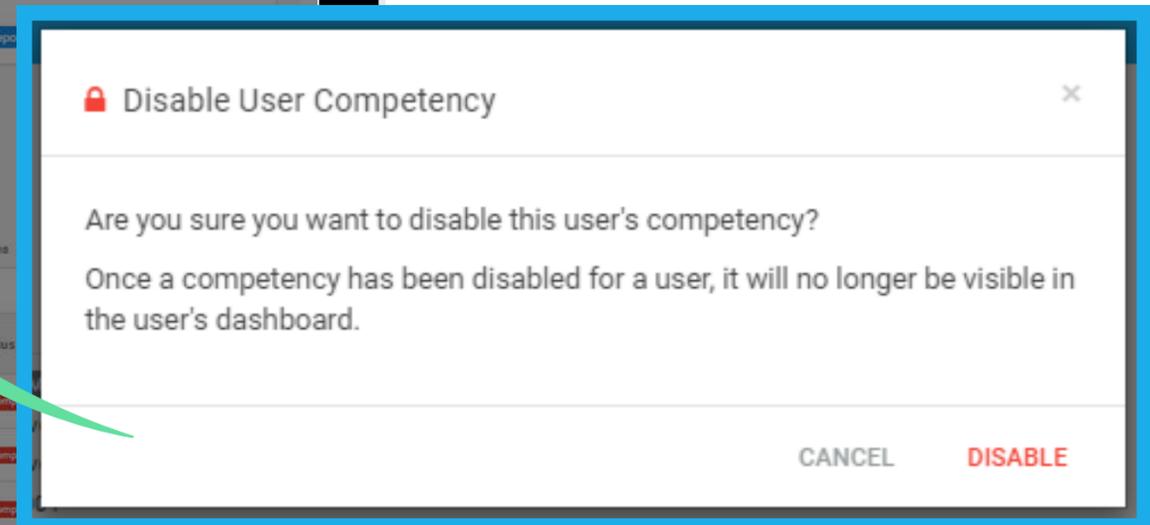
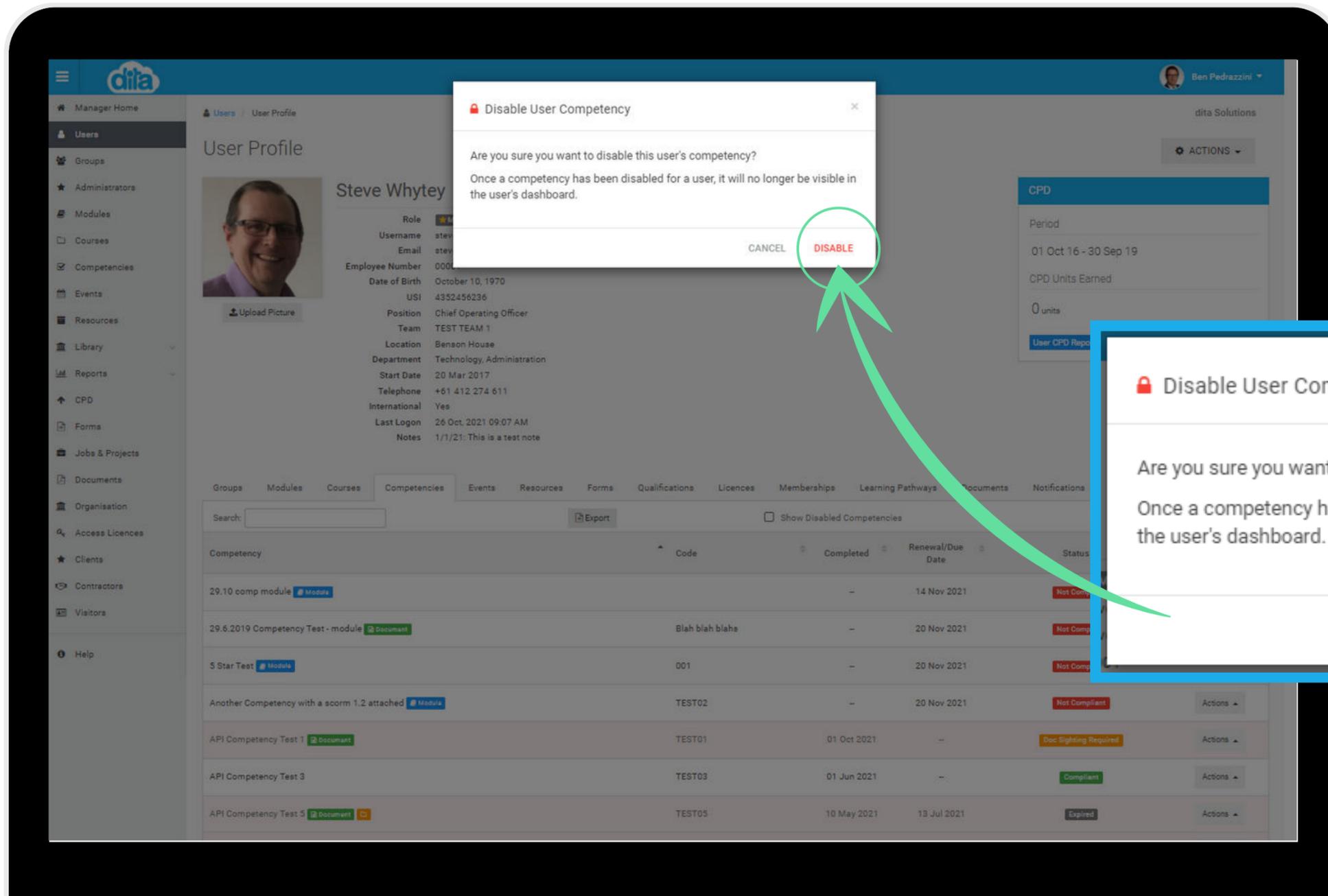
Where a competency is in a **"Not Compliant"** status, an **"Edit Due Date"** action has been added. This allows admin to provide extra time for a user to become compliant. Simply select **"Edit Due Date"** from the **Actions** list and update the due date.



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.



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.

User Competency

The screenshot shows the user profile for Steve Whytey. The 'Competencies' tab is active, and the 'Show Disabled Competencies' checkbox is checked. The 'Actions' dropdown menu is open, showing the 'Re-Enable' option. The callout boxes highlight these key elements.

Show Disabled Competencies

- Upload Document
- Edit Due Date
- New Record
- Add Sighting
- Remove
- Re-Enable

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.

