



Competency/Scheduling Integration User Guide

Competency and Scheduling Modules



Introduction

This User Guide will provide an overview of how the Scheduling and Competency modules integrate and interact together. If your license includes both of these modules, you will be able to link information in both modules together. The benefit of integrating these two modules is that it removes the need of updating certain information twice if links are created. There are two different types functions and information that can be integrated.

Once you understand how to integrate these two modules, you will be able to increase efficiency and save time by avoiding the duplication of work. Other associated topics related to Integration, including setting up Skillsets and Levels, are listed on the Resources Page.

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Job Description Integration

Before beginning the integration process, please make sure your license includes both modules. Associating a schedule's Job Description to a Level ensures that an employee that is qualified to an associated Job Description will automatically be added to the associated Skillset Level.

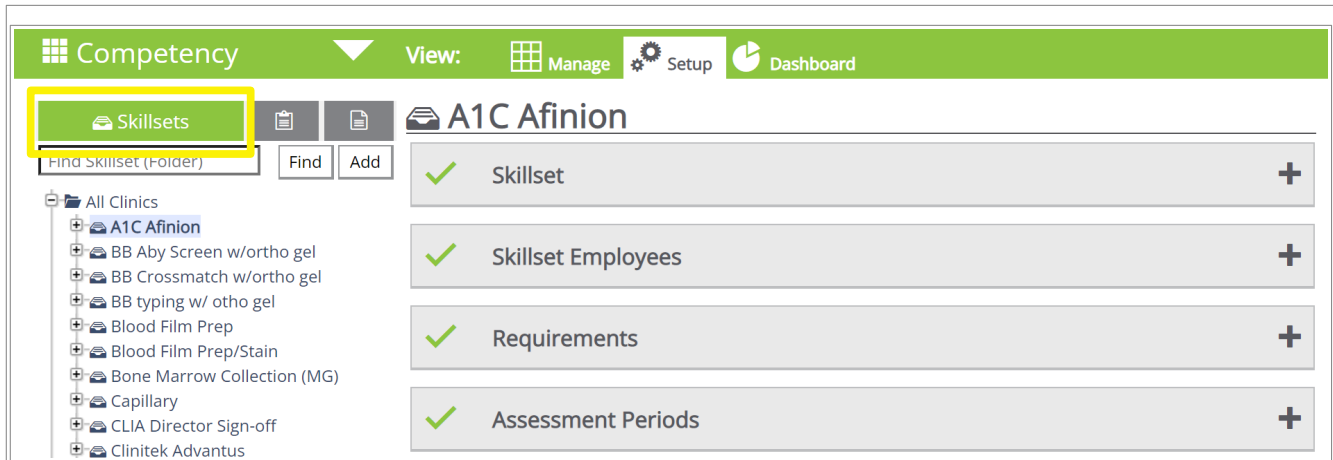


Figure 1

To begin integration, navigate to the Setup tab within the Competency module and select the Skillssets perspective. **(Figure 1)** Select the Skillset that you wish to integrate and select the Levels color bar.

Select the Jobs link under the Job Descriptions column. **(Figure 2)** This will open the Edit Level menu.

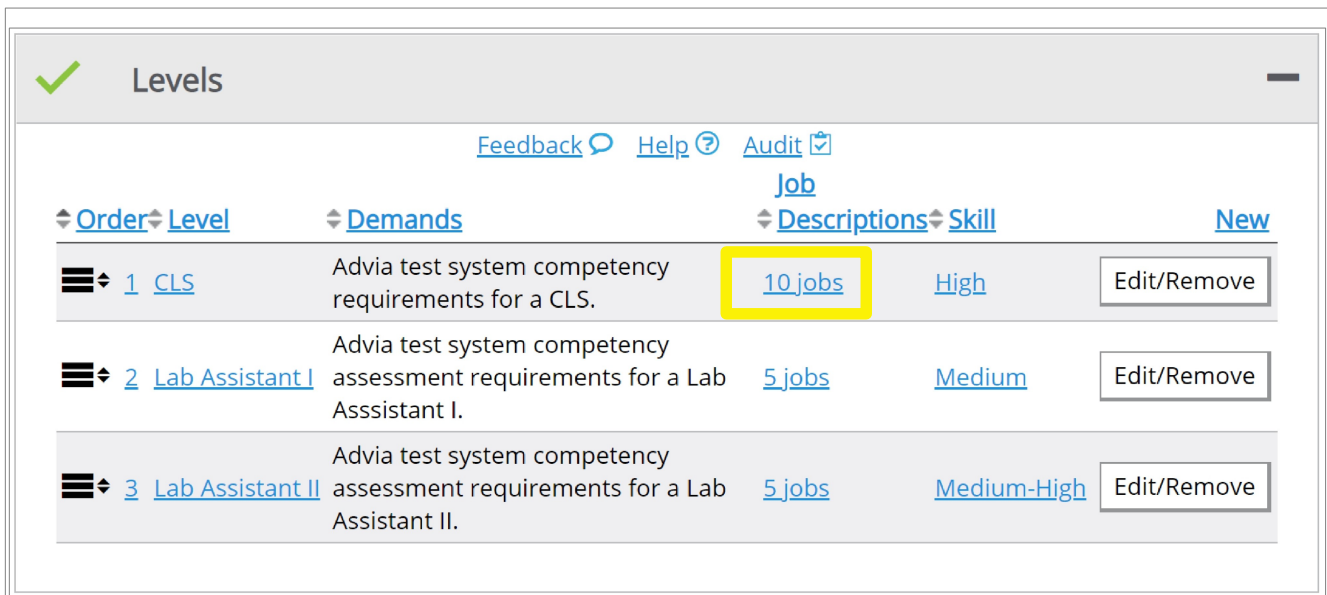


Figure 2

Integration Continued

By entering in keywords into the **Job Description**, **Schedule**, **Skillset**, or **Level** fields and then selecting the **Filter** button, you can narrow down the list of Job Descriptions to locate the one you wish to associate with scheduling.

Select the toggle next to the Job Description in order to associate it to the Level. When selected, it will display a green check mark. You may also select the **Add All** button to associate all Job Descriptions to the Level.

Edit Level [Close]

Level Name: [Level Name]
 Job Descriptions: [Job Descriptions]

Search For Job Descriptions: [Search For Job Descriptions]

Filter	Job Description	Schedule	Skillset	Level	
[Job Description]	[Schedule]	[Advia]	[CLS]	[Add All]	
	Blood Bank	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>
	Chemistry	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>
	Laboratory Days	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>
	Day Shifts	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>
	Late	Main Lab Chemistry	Advia	CLS	<input checked="" type="checkbox"/>
	AM Shifts	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>
	PM Shifts	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>
	Mid	Main Lab Chemistry	Advia	CLS	<input checked="" type="checkbox"/>
	Early	Main Lab Chemistry	Advia	CLS	<input checked="" type="checkbox"/>
	Night Shifts	6th Floor Days	Advia	CLS	<input checked="" type="checkbox"/>

Figure 1

Disassociating Job Descriptions

To disassociate Job Descriptions from levels, locate the **Job Description** in the **Edit Level** menu. Selecting a toggle button with the green check mark will cause it to be disassociated and display a gray icon with an 'x' next to it. (Figure 2)

Filter	Job Description	Schedule	Skillset	Level	
[Job Description]	[Schedule]	[Advia]	[Level]	[Add All]	
	Laboratory Days	6th Floor Days	Advia	Lab Assistant I, Lab Assistant II	<input type="checkbox"/>
	Day Shifts	6th Floor Days	Advia	CLS, Lab Assistant I, Lab Assistant II	<input checked="" type="checkbox"/>

Figure 2

Linking Job Descriptions to Skillset Levels

To link scheduling Job Descriptions to competency Skillset Levels, navigate to the Setup tab of the Scheduling module and select the Schedule you wish to edit. **(Figure 1)**

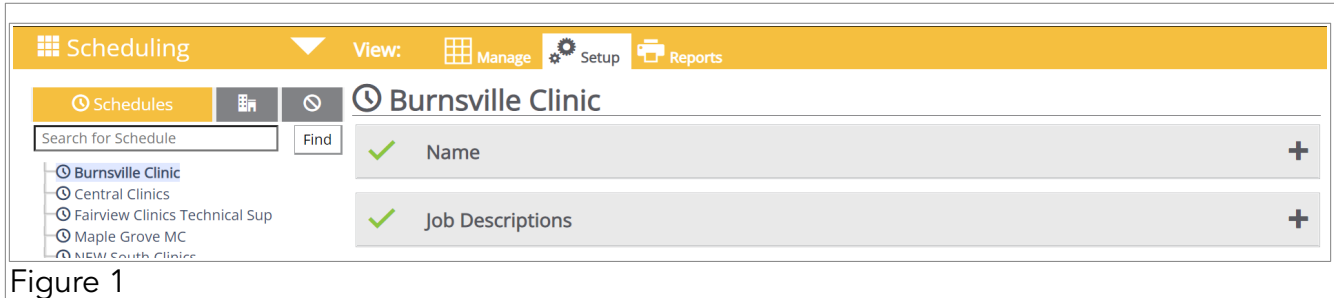


Figure 1

Next, select the **Job Descriptions** color bar and select the **Job Description** link. **(Figure 2)** This will open the **Edit Job Description** pop-up window.

Select the Add Skillset Levels side tab.

You can choose to filter your results by Skillset ID and/ or level to refine your search. Select the filter button once you've entered your search criteria.

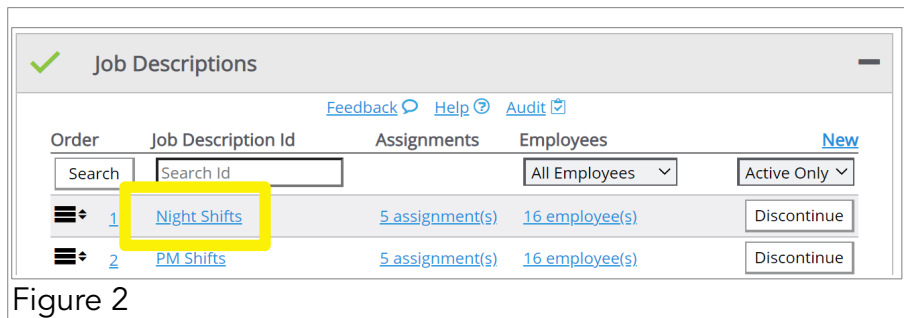


Figure 2

Once you've located the skillset you wish to associate, select the checkbox toggle button. It will display a green check mark to indicate that it is associated. **(Figure 3)**

To remove Skillsets from a Job Description, navigate to the Add Skillset Levels pop-up window as previously described, locate the Skillset Level you wish to disassociate, and select the toggle so that it displays a gray check mark.

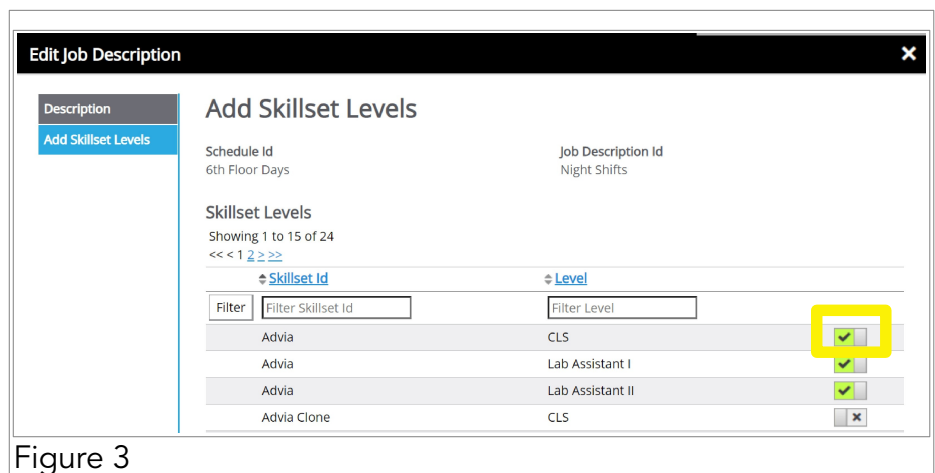


Figure 3

Resources

This concludes the User Guide for **Scheduling/Competency Integration**. We hope that this guide has given you a better understanding of our modules connect and interact.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

Related Topics

Please select any link to skip to that topic.

Skillset Setup	PDF Document
Job Description User Guide	PDF Document
Skillset Requirement Setup	PDF Document
Skillset Levels	PDF Document