



Competency Dashboard User Guide

Competency Module



Introduction

The Competency Dashboard provides an easy portal for viewing, managing, and generating reporting for Assessments and Tasks to Complete for individual employees, departments, or for your entire organization. This tool also provides a graphical display of the status of tasks and assessments.

Due to the consolidation of data in the Competency Dashboard, admins can gain a quick, high-level overview that allows you to assess status and make decisions. Mastering this tool will give you better visibility on your organization's general progress in completing tasks as well as looking at granular detail for specific employees.

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Dashboard Navigation

To view the **Competency Dashboard**, select the **Dashboard** tab within the Competency Module. (Yellow box, Figure 1)

The **Competency Dashboard** has two different perspectives with which to access **Assessments** and **Tasks to Complete**. Select the folder icon to display the **Department Skillsets** perspective or the clipboard icon to display the **Skillsets** perspective. (Figure 2)

If you selected **Department Skillsets**, you can select the **Change** link below it to switch which department you're currently viewing. (Yellow box, Figure 2)

You can further filter your results by selecting a date range. (Yellow box, Figure 3)

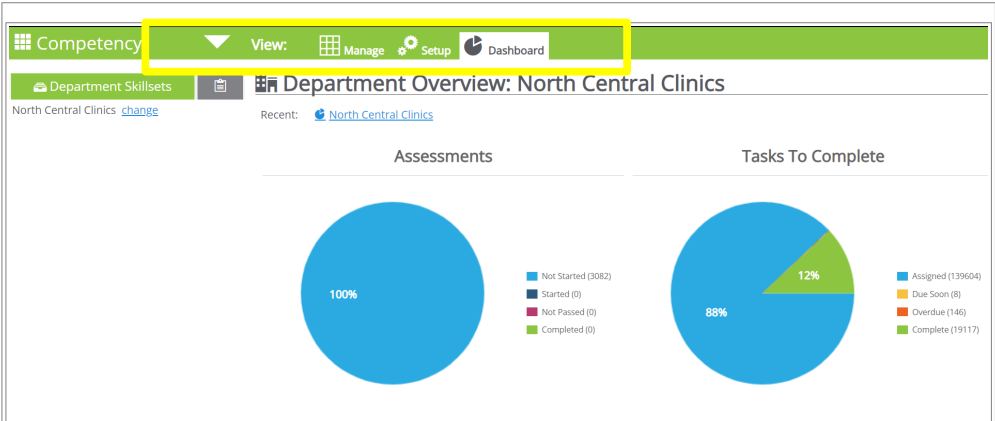


Figure 1

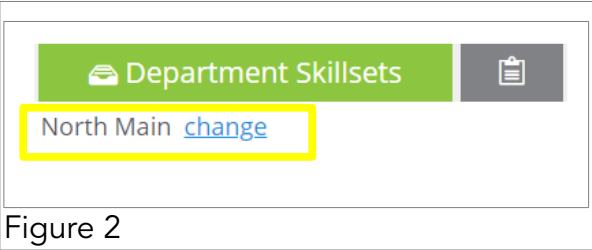


Figure 2

Note: The **Department Skillsets** perspective is useful for gathering reporting data on individual departments and viewing the progress of competency assessments or to view progress for a specific employee. The **Skillset Requirements** perspective is useful for viewing the progress of your organization on a given assessment or for viewing the breakdown by exam type.

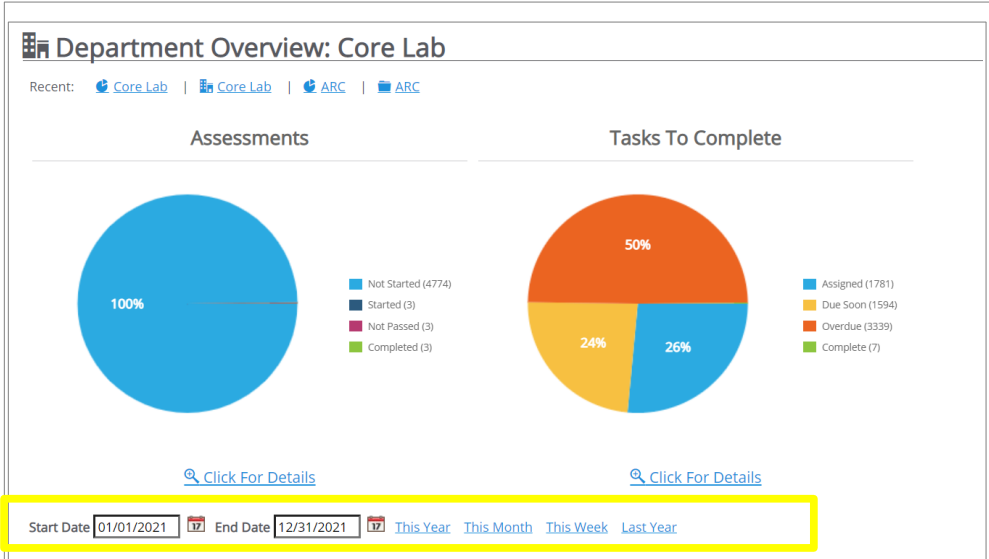


Figure 3

Assessments Color Bar

Once you've selected your perspective, select the **Click for Details** link below either the **Assessments** or **Tasks to Complete** pie charts. (Yellow box, Figure 1)

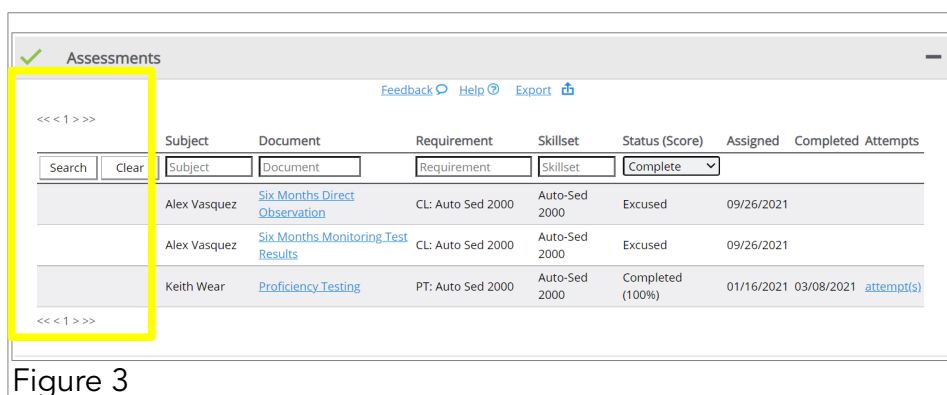
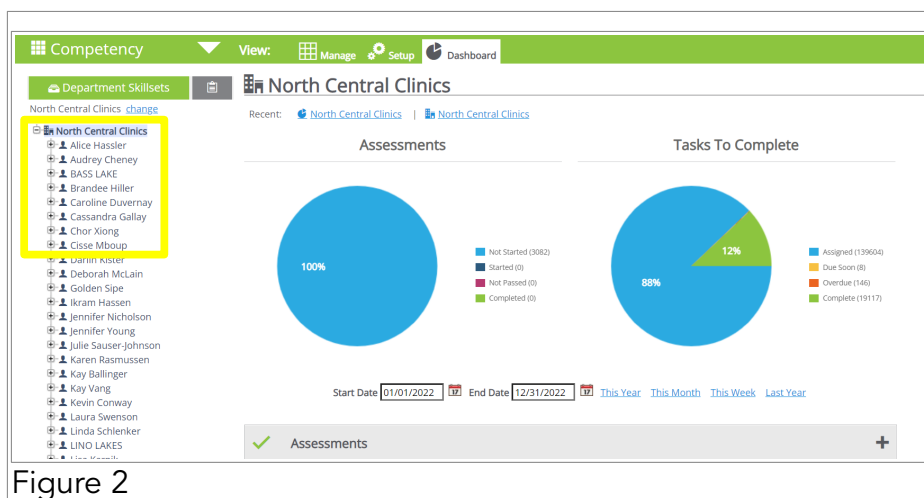
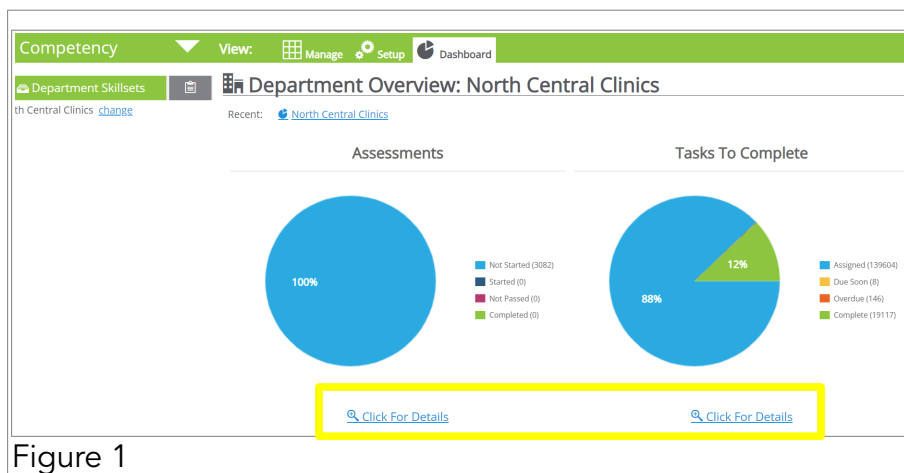
This will display a list of all departments and sub-departments. (Yellow box, Figure 2)

Select either a sub-department or a specific employee and then select the **Assessments** color bar to expand it.

You can view all **Assessments** or filter your results by **Subject**, **Document Name**, **Requirement**, **Skillset**, or the **Status** of the Skillset.

If there are more **Assessments** than there is space to view them on, select the arrow keys at the top or bottom of the left side of the page. (Yellow box, Figure 3)

Process is continued on page 5.



Assessment Attempts and Review Assessment

Selecting the **Attempts** link will open the **Assessment Attempts** pop-up window. From here, you can view information about the attempts such as the attempt number, total score, points needed, total points, or completion date. (Figure 1)

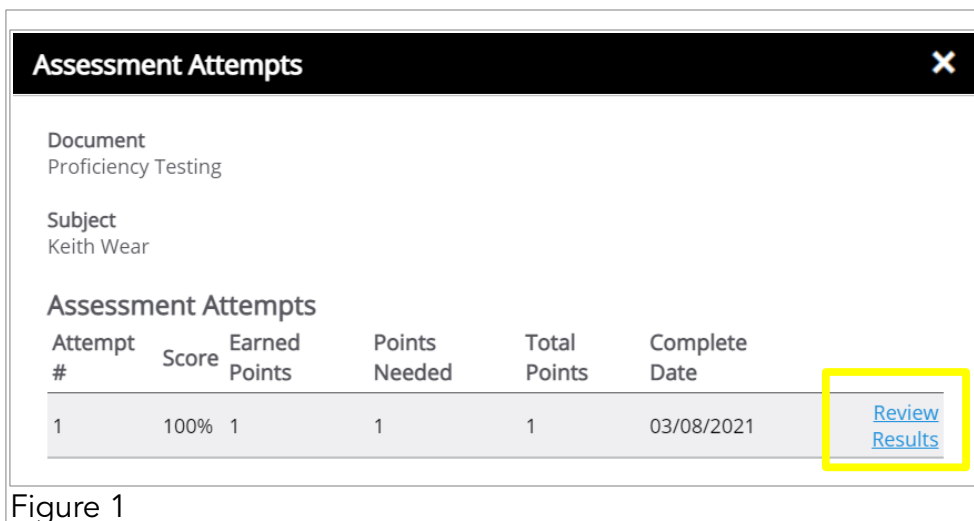


Figure 1

Additionally, you can view a breakdown of the results by selecting the **Review Results** link. (Yellow box, Figure 1)

This will open the **Complete Document** pop-up window. (Figure 2)

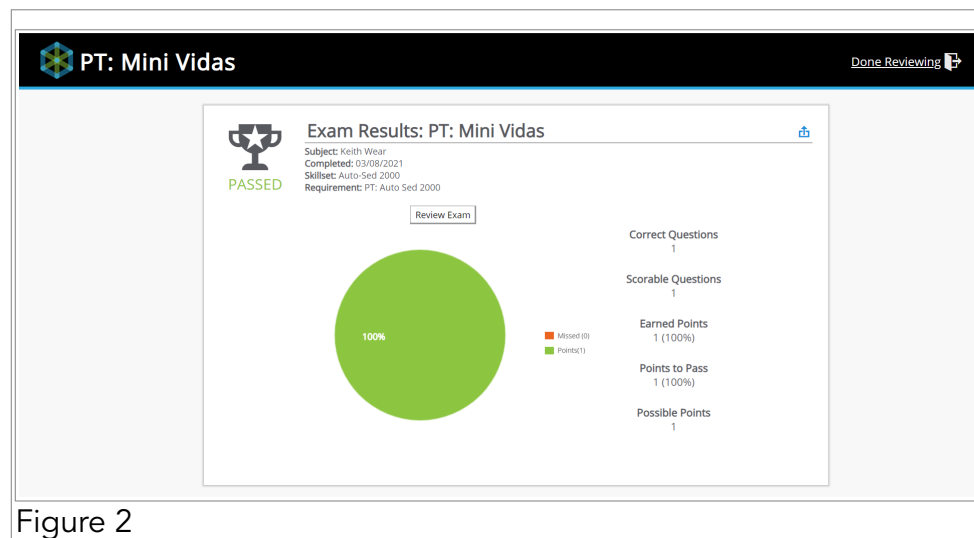


Figure 2

The number of correctly answered questions, scorable questions, earned points, points to pass, and possible points will be visible.

Additionally, if you want to review the exam, select the **Review Exam** button. This will open the **Document Editor** (Figure 3) where you can view individual answers given for each question.

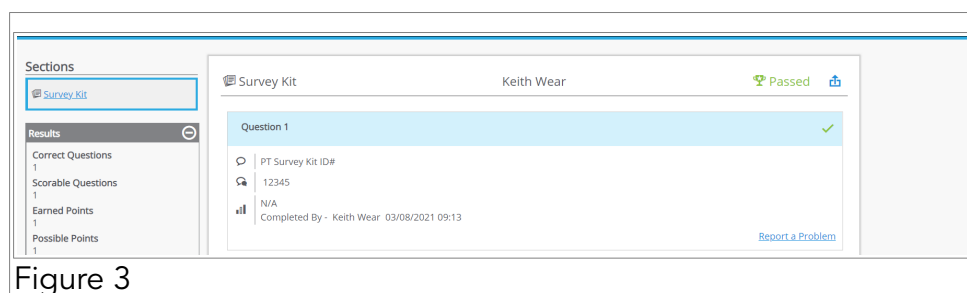


Figure 3

Print or Export Assessments

If you wish to print or export assessments, navigate to the **Assessments** color bar and select it to expand it. Next, select the **Export** link or icon. (Yellow box, figure 1)

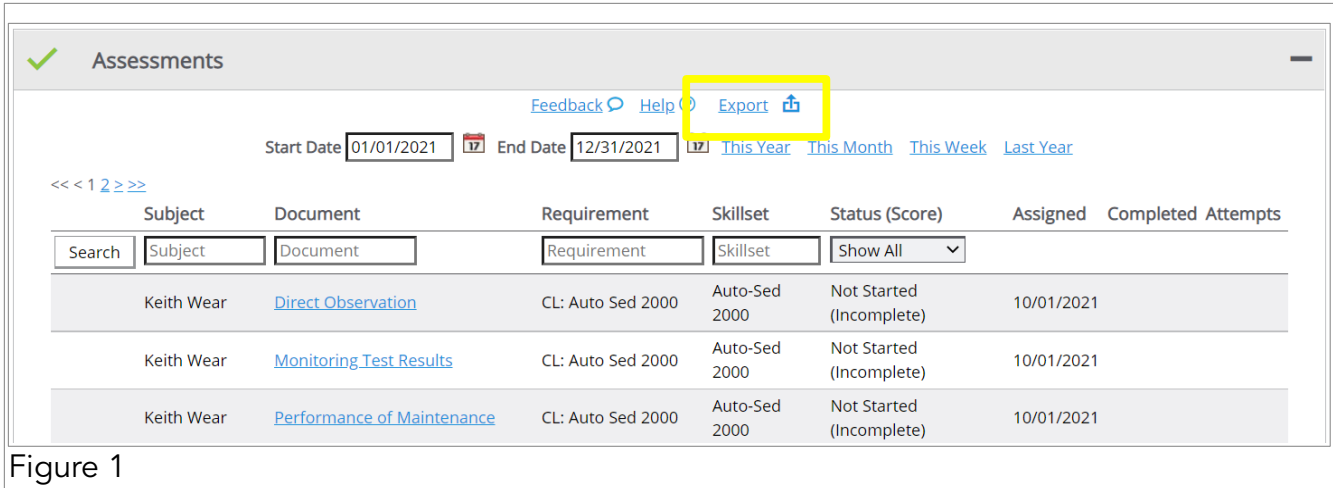


Figure 1

This will prompt you to select either the **Print** or **Excel** functions. (Figure 2)

Selecting **Excel** will download all given **Assessments** in Excel format.

Selecting **Print** will open the print screen. (Figure 3)

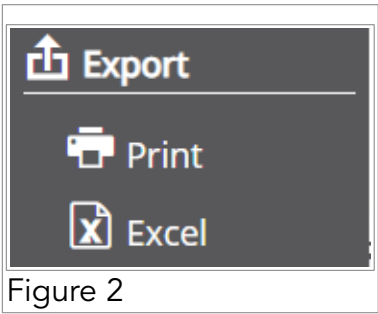


Figure 2

Selecting the **Print** command in the upper right corner (Yellow box, Figure 3) will open your computer's print interface where you can select printer settings and print the page.

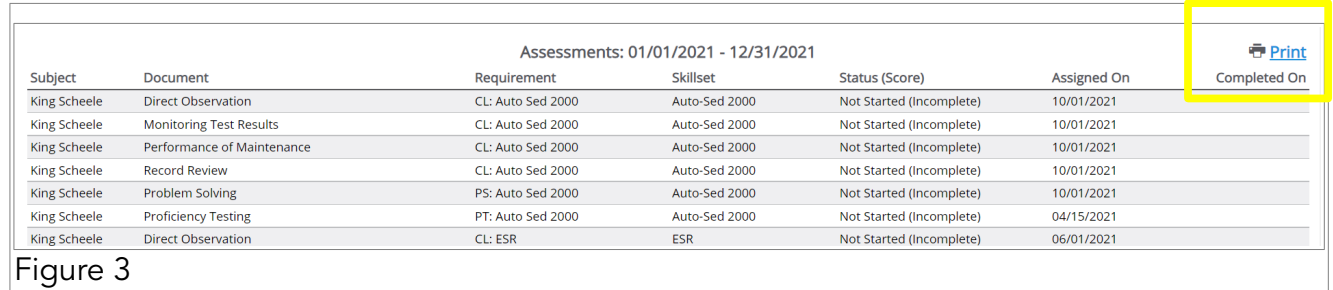


Figure 3

Assessment Details

To view **Assessment Details**, select the **Document** link. (Yellow box, Figure 1)

Subject	Document	Requirement	Skillset	Status (Score)	Assigned	Completed Attempts
Barbara Dodd	Direct Observation	CL: ESR	ESR	Not Started (Incomplete)	06/01/2021	
Barbara Dodd	Monitoring Test Results	CL: ESR	ESR	Not Started (Incomplete)	06/01/2021	
Barbara Dodd	Performance of Maintenance	CL: ESR	ESR	Not Started (Incomplete)	06/01/2021	

Figure 1

This will open the **Assessment Details** pop-up window. (Figure 2) You can view **Tasks to Complete**, the Assessment's history, or remedial documents by selecting the appropriate side-tab. (Yellow box, Figure 2)

Additionally, you can email reminders to staff by selecting the **Email** button or the **Email All** link. (Teal box, Figure 2)

Assessment Details

Tasks To Complete

Skillset: Mini Vidas | Requirement: CL: Mini Vidas | Document: Performance of Maintenance

Subject: King Scheele | Assigned: 03/20/2021 | Status: Not Started

Tasks

Filter	Filter Assignee	Status	Assigned	Due	Action
	King Scheele	Overdue	03/20/2021	04/19/2021	Email

Figure 2

Tasks to Complete Color Bar

Selecting the **Tasks to Complete** color bar will allow you to send notification emails and export or print **Tasks to Complete**. You can either select the **Email All** link (Yellow box, Figure 1) or the **Send Email** link. (Orange box, Figure 1)

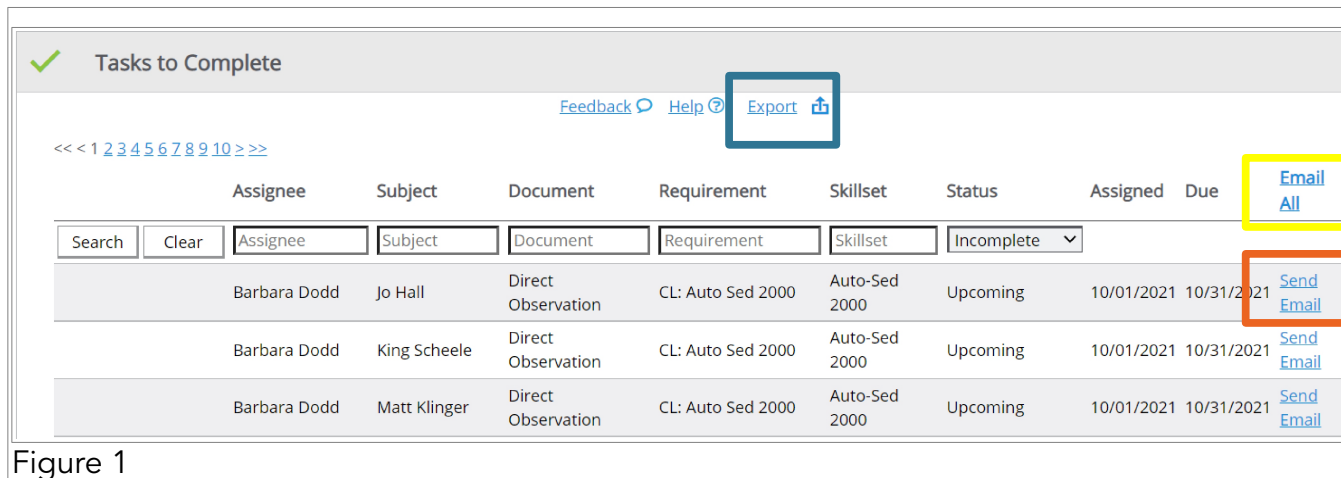


Figure 1

Selecting either of the above mentioned options will open the **New Message** pop-up window. (Figure 2) You can set recipients or CC'd contacts as well as customize the reminder message in the Body field. When finished select the **Send Email** button.

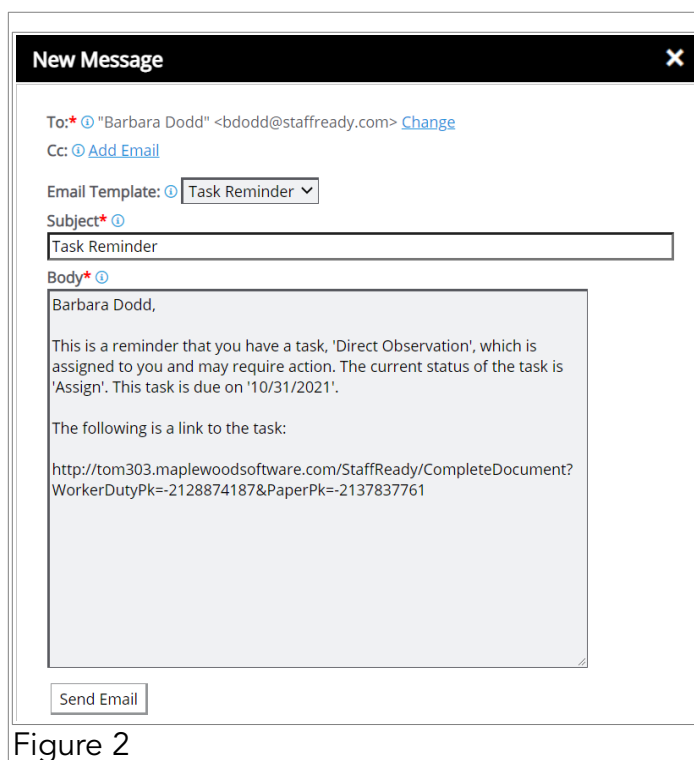


Figure 2

As before, if you want to **Print** or **Export** select either the **Export** link or the icon. (Teal box, Figure 1) If you selected **Print**, the **Tasks to Complete** print screen will open. (Figure 3)

Selecting the **Print** function will open your computer's print interface where you can select printer settings and print the page.

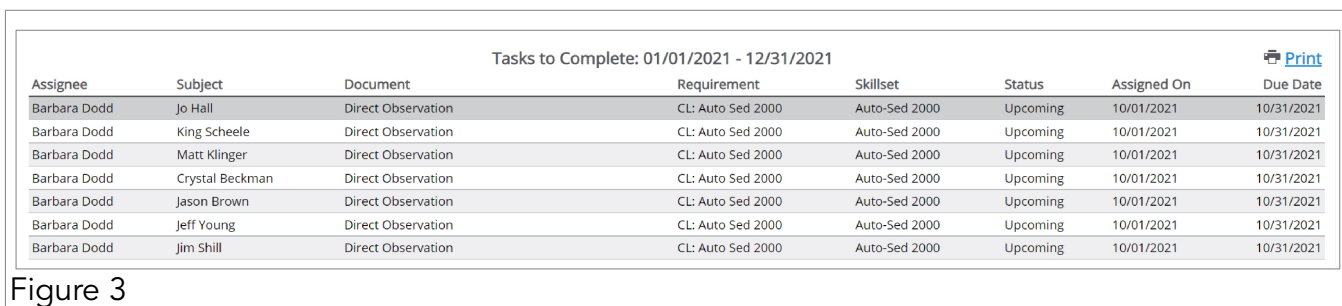


Figure 3

Resources

This concludes the User Guide for the **Competency Dashboard**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Competency module.

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.

Skillsets and Employees	PDF Document
Skillset Levels	PDF Document
Modify Assessments Assignments, and Remediation	PDF Document
Publish and Restart Assessment Periods	PDF Document