



# The Complete Guide to CompetencyCore for End Users

Version 8.13



The recipient of this document acknowledges that HRSG is the owner or the licensee of all intellectual property rights in the material published. Those works are protected by copyright laws and treaties around the world. The recipient shall not license, sublicense, sell, resell, transfer, assign, or otherwise commercially exploit or make this document available to any third party in any way. The recipient acknowledges that HRSG maintains copyright over the document and reserves the right to grant any exception to this copyright agreement.

Copyright © 2022 HRSG

# Contents

<b>I Getting Started for End-Users</b>	<b>1</b>
1 Manage your account	2
2 Manage your settings	4
3 A tour for new users	6
4 Customize your dashboard	8
5 Keep track of your tasks	11
<b>II Using CompetencyCore</b>	<b>13</b>
6 Complete your profile	14
7 Take a strength check	17
8 Set goals	20
9 Build a career path	26
10 Manage your team	28
11 Perform an assessment	30
12 Browse learning resources	32
13 Participate in job validation	34
14 Participate in a competency profiling exercise	38

## **Part I**

# **Getting Started for End-Users**

# Chapter 1

## Manage your account

### Logging in

Welcome! If you're using CompetencyCore for the first time, this is a great place to get started. The first step is to open your company's CompetencyCore site. Enter your username and password and click **Login**. Contact your software administrator if you're not sure what your username or password is.

Once you've logged in, you'll see our Terms & Conditions. After clicking **Agree & Continue**, the Privacy Notice opens in a new window. Click the close icon to dismiss the window and start using CompetencyCore. You can always access the Privacy Notice from your personal menu.

### Resetting your password

Can't remember your password? Click the **Forgot your password?** link above the **Login** button. Enter your email address and click **Next**. You'll receive an email with a link to the Set Password page. Your password needs to include at least:

- 1 capital letter
- 1 number
- 8 characters

**Tip:** You'll know your password is strong when the meter colour turns green. Remember that the longer the password, the better.

## Uploading a profile picture

On the top left of your dashboard, click the profile picture area to upload a photo. If you don't upload a photo, your initials are displayed.

**Caution:** Your picture should be at least 200×200 pixels and no larger than 1.5MB.

## Making changes to your account

Click your profile picture on the top right of your screen and select **Account**. Here are some details you can change:

- Username
- Password
- First name
- Last name
- City
- Province/State
- Country

Scroll to the bottom of the page and click **Save** once you've finished making changes.

## Logging out

Click your profile picture on the top right of your screen and select **Logout**. Closing your browser also logs you out of your account.

## Chapter 2

# Manage your settings

Administrators manage the site settings, but you can manage your personal settings that only apply to your account. If your administrator sets your site to English but you prefer French, or if you don't want to receive notifications by email, this is where you can make those changes.

### Accessing your settings

Click your profile picture on the top right of your screen and select **Settings**. Here's what you can customize:

- Email notifications
- Default language
- Time zone

### Notification settings

Decide whether you want to receive notifications by email. Even if you turn off the **Email notifications** switch, you can still access your notifications directly in CompetencyCore by clicking the the bell icon.

## Language settings

The Default language setting is the language you're using. If your site has more than one available language, select the one you prefer and click **Save** at the bottom of the page. The language doesn't change immediately. Just refresh the page, and you'll be using the language you selected.

## Time zone settings

Your administrator might be in a different time zone, but you can change the time zone of your own account. All of the dates and times on the site change to match the time zone you select.



## Chapter 3

# A tour for new users

### Main menu

Access the different areas of CompetencyCore in a menu across the top of the screen. Depending on your permissions, you might see additional pages in a drop-down when you hover over a menu item. You can always click **Home** to return to your dashboard.

### Notifications

An indicator appears on the bell icon when there's a new task to complete or an update about a task you're a part of. For example, you might receive a notification to sign off on your job description or to complete an assessment. Click the bell icon to view a notification with a link to the task so you can get started or review changes right away.

### Tasks

Click the list icon to access a complete list of the assessments, surveys, goals, and other tasks assigned to you. Check out the [Keep track of your tasks](#) article to learn more.

## Personal menu

Click your profile picture on the top right of your screen to open your personal menu.

- **Product Updates:** Check out our release notes and announcements.
- **Account:** Make changes to your profile picture, username, password, or contact details.
- **Settings:** Customize your email notifications, language, and time zone.
- **Notifications:** View updates about tasks you're participating in or tasks to complete.
- **Attachments:** View and manage all of the files you've uploaded.
- **Privacy Statement:** Read our Privacy Statement and learn how your data is used.
- **Logout:** Log out of your account. Closing your browser also logs you out of your account.

## Chapter 4

# Customize your dashboard

The dashboard is the first thing you'll see once you're logged in. The dashboard is set up by your administrator, but you might have the option to add and rearrange widgets such as the Weather, My Tasks, Recently Viewed Jobs, and a Blog or Twitter feed. Use it to see information about your site at a glance and to keep track of tasks.

### Adding your current role

In your CompetencyCore account, navigate to **Home** to access the dashboard. The first step is to make sure your job shows up beside your profile picture. This helps CompetencyCore populate widgets like Job Matches. If it's not already set up, click the **Add Role** link beside your profile picture. Search for and add your job description.

### Adding widgets

Depending on how much flexibility your administrator allows, you can make customizations. These customizations only affect your own dashboard.

- To add a widget, click **Options** and select a widget in the drop-down.
- To resize a widget, click the bottom right corner and drag it.
- To move a widget, click the header area and drag it.

- To remove a widget, point to the header area, click the 3-dot icon, and select **Remove** or click **Options** and deselect the widget in the drop-down.

Your administrator can update your dashboard. They can also reset it so all of your customizations are lost. You'll see a message on the dashboard if this happens.

## **Assessment Completion**

If your site has the Assessment module and you have access to reports, use this widget to pin an assessment report you've saved to your dashboard. You can add more than one report.

## **Broadcast Message**

See updates, reminders, or announcements from HR administrators in your organization.

## **Career Path**

See your current role, next step, and target. Click a job title to view a detailed comparison of your profile qualifications and the job requirements.

## **Job Count**

See a count of the total draft and published jobs on your site.

## **Job Matches**

As you complete your profile, your qualifications are matched to jobs. The top five job matches appear in this widget. Click the expand icon to see the percentage match of each library type.

## **My Tasks**

See a count each type of open task left to complete so you never miss a due date. You'll also see a count of upcoming and overdue tasks. Click a task to open the full list pre-filtered to tasks of that type.

## **Recently Viewed Jobs**

See the top 10 latest job descriptions you've viewed.

## **RSS Feed**

See the 35 most recent posts from a blog.

## **Top Competencies**

See the top 10 competencies most frequently added to jobs.

## **Twitter**

See the 20 most recent tweets from Twitter accounts specified by an administrator.

## **Weather**

Get the weather forecast. To set up this widget, enter the name of a city, select a country in the drop-down, and choose Metric (°C) or Imperial (°F) units.

## Chapter 5

# Keep track of your tasks

It can be challenging to keep track of everything that needs to get done. You might have assessments to complete, surveys to respond to, and plans to review. We list your tasks in one place with a direct link to start or continue them so you can get straight to work instead of hunting through notification emails.

### Accessing your tasks

Click the list icon on the top right of your screen. You'll see a blue indicator appear on the icon when a new task is assigned for you to complete.

### Filtering tasks

Each type of task has a different coloured icon, so you can quickly scan the list and know what you need to do. You can also filter by type. Here are the different types of tasks:

- Strength Check Reviews
- Profile Validations
- Goal Validations
- Employee Sign-Off
- Job Validations
- Assessments

- Competency Profile Surveys

You can sort tasks by who you're assigned as:

- Manager
- Subject
- Participant

Or by due date:

- Due date descending
- Due date ascending
- Date added ascending
- Date added descending

Click the funnel icon on the top right of the table to display a status filter:

- Open
- Complete
- Overdue

## Archiving tasks

Completed tasks can be archived so they don't distract from what still needs to be completed. Click the funnel icon, select **Complete** in the Status filter, and click **Archive** beside a task. Archived tasks are still accessible. Click the 3-dot icon on the top right of your screen and select **Archived**. A new window opens displaying archived tasks. Click **Unarchive** to return a task to the main list.

## My Tasks widget

To make sure you never miss a due date, add the Tasks widget to your CompetencyCore dashboard. This widget shows a count of each type of open task. Check out the [Customize your dashboard](#) article to learn more.

## **Part II**

# **Using CompetencyCore**



## Chapter 6

# Complete your profile

Profile is your own space in CompetencyCore to keep track of your competencies and other strengths. Building a profile helps your career development because you'll see the jobs you match to in your organization. Think of your profile as a toolkit that you can update as you complete goals and participate in tasks.

### Setting your role

In your CompetencyCore account, navigate to **Profile** in the main menu. The first step is to make sure your job shows up below your name on the top left of the page. This helps CompetencyCore suggest strengths to add based on your job requirements. If it's not already set up, click the 3-dot icon and select **Set Role**. Search for and add your job description.

**Tip:** Click the avatar with your initials to upload a profile picture.

### Adding strengths

#### Option 1. Take a strength check

If available, click the **Take a strength check** button. You'll be asked to rate your proficiency levels for the competencies (and possibly the knowledge) in your current role. Once submitted, you can see how your ratings compare with the

job requirements and add the items you rated at or above target to your profile. If validation is required, you'll be prompted to send the strength check to your manager.

### **Option 2. Use quick add**

Click **Quick Add** on the top right of the page to open a window listing all of the requirements for your current role. You can change the level and deselect items that don't apply. Click **Submit**. If validation is required, you'll be prompted to send this request to your manager. You might need to validate some strengths like competencies and not others like education, but these decisions are set up by your administrator.

### **Option 3. Browse all strengths**

Click **Add** to browse all strengths. Suggestions are based on your job description, but you can also search and filter by type. You can select multiple strengths and click **Save**. Click a strength you've added and select **Set Level**. Once you've set your current level, you'll be prompted to request validation if required.

**Note:** Click a strength and select *Cancel Review* to cancel the validation request. Your manager isn't notified, but the request is removed from their tasks to complete.

## **Archiving strengths**

Click a strength and select **Archive** to hide it from managers and HR. Archived strengths contribute to your profile score, but they no longer contribute to job matching, so you can focus on strengths relevant to your target role. Click the 3-dot icon on the top left of the page to access your Strengths Archive and unarchive items if needed.

If an administrator archives a library item, that item will be automatically archived on your profile because it can no longer contribute to job matching.

**Note:** Strengths you made private before August 2021 have now been archived.

## Viewing job matches

**Tip:** Check out the [How does user-to-job-matching work? FAQ](#) to learn how your profile score and job match scores are calculated.

Click **+ View Matches** on the bottom left to open a list of job matches. Jobs are ordered first by highest match percentage and then alphabetically. Only jobs at an equal or higher level to your own current role are displayed by default, but you can select the **Show all** checkbox to see jobs at lower levels. You can also search for a specific job or filter by group.

If you see a job you're interested in, hover over the title and click the star icon to save that job in the side panel for future reference. Keep in mind that your manager and HR can view your starred jobs.

Click a job title to open a breakdown of the job requirements compared with your profile. From this page you can click **Actions** to take a strength check, create a goal based on the job, or view an existing goal.

## Chapter 7

# Take a strength check

A strength check lets you rate your competency and knowledge based on the requirements of any job. Depending on how CompetencyCore is set up, you can then send these ratings to your manager for their review, or update your profile directly with the results.

### Accessing strength checks

Employees can start a strength check from an empty profile or when viewing a job match. Managers cannot initiate a strength check for an employee, but they'll receive an email notification and a task in CompetencyCore if a strength check requires their review. They can always revisit strength checks they've reviewed for their reports from the Tasks page.

### To start a new strength check (employees)

Make sure you have at least one strength on your profile so you can see job matches.

1. Navigate to **Profile** in the main menu.
2. Click **View Matches** in the left-hand sidebar.
3. Search for a job you're interested in.
4. Select the **Show all** checkbox to see jobs at lower levels.

5. Click a job title to open a comparison of your strengths and the job requirements.
6. Click **Actions** and select **Take a Strength Check**.

**Note:** The action is disabled for jobs that have no competencies or knowledge and for jobs that have no defined levels.

## To resume or view previous strength checks

Resume a strength check or review your completed ratings on the Strength Check History page.

1. Navigate to **Profile** in the main menu.
2. Click the 3-dot icon beside your name.
3. Select **Strength Checks** in the dropdown.
4. Click a job title to resume the strength check.

## Performing strength checks

1. Follow the steps above to access a strength check.
2. Click **Get Started**. You'll see level dots beside each requirement.
  - For employees, highlighted dots represent your current levels.
  - For managers, highlighted dots represent the employee's ratings.
3. Select a dot to display the level details on the right side of page.
4. Click **Select** to rate the level you think you're performing at.
5. Click the reset icon if you need to clear a selection.
6. Click **Finish** on the top right of the page and then click **Submit**.

**Caution:** Employees can't make changes to ratings after submitting a strength check. Managers can edit their ratings even after submitting, but only if the employee's profile has not yet been updated.

## Viewing results and updating profile (employees)

Once you've submitted a strength check, you'll see an overall score followed by a comparison of your ratings and the required levels. Click the **Profile** tab to

see the competencies and knowledge that will be added or the levels that will be updated once you click **Update Profile**.

**Note:** If validation is required, you'll be prompted to send the strength check to your manager. You'll receive an email once your manager has updated your profile.

## Viewing results and updating profile (managers)

Once submitted, you'll see two overall scores: one based on the employee's ratings and the other based on your own. This is followed by a detailed comparison. You can toggle between the employee's ratings and the required levels to see how these compare to your evaluation.

It's best practice to discuss your ratings with a direct report before updating their profile. Click the **Conversations** tab and then click **Set up a Conversation** to open a draft email pre-filled with a default message. Make your own customizations and send to the employee. Once that conversation has taken place, click the **Profile** tab and click **Update Profile**.

You can always access strength checks you've reviewed for employees from the Tasks page.

## Chapter 8

# Set goals

You can set goals in CompetencyCore to fill gaps on your profile and explore new interests. Each goal is made up of challenges which can include competencies, knowledge, and certifications. For example, someone wanting to become a Sales Manager might work on their CRM knowledge, achieve a Sales Professional certification, and increase their proficiency in the Strategic Sales Planning and Account Management competencies.

For job-based goals, we set up challenges automatically so you can get straight to work. We also offer the option to set goals based on personal interests so you can custom select challenges. Competency, knowledge, and certification challenges all integrate with your profile, so you'll see your achievements and higher job match scores in Profile as you make progress in Goals.

### Option 1. Job-based goals (Excelling in a role)

These types of goals are based on a job description. We compare your profile with the requirements of a role and generate a set of challenges based on those gaps. Just follow the steps below to select a job, and CompetencyCore takes care of the rest.

1. Navigate to **Goals**.
2. Click **Create** on the top right of the page.
3. Select **Excel in a Role** and click **Next**.

4. Search for and select a job title.
5. Add an optional due date.
6. Decide whether to share with your manager. They'll receive an email notification and have access to your goal and its challenges.
7. Click **Create**. On the Goals page, expand the new goal to see a list that might include competencies, knowledge, and certification challenges.
8. Click **Add+** in the Due column to add a specific due date for a challenge.
9. Click a challenge name to open a list of tasks to complete.

**Tip:** You can also create a goal based on a job match, a job in your career path, or a completed assessment where you are the subject.

## Option 2. Custom goals (Building specific strengths)

Specific strength goals give you the flexibility to choose your own challenges. Customize the goal to suit your interests, and set targets at your own pace.

1. Navigate to **Goals**.
2. Click **Create** on the top right of the page.
3. Select **Build Specific Strengths** and click **Next**.
4. Enter a goal name.
5. Add an optional due date.
6. Decide whether to share with your manager. They'll receive an email notification and have access to your goal and any challenges you add.
7. Click **Create**. On the Goals page, click **Add** under the new goal.
8. Select competencies, knowledge, and certifications to add and click **Save**. Suggestions are based on items that appear on jobs in the same job group as your current role, or on the items that appear most frequently on jobs if you don't have a current role assigned.
9. Click **Add+** in the Due column to add a specific due date for a challenge.
10. Click a challenge name to set a target level. You can change this level on the Goals page by pointing to the challenge, clicking the 3-dot icon, and selecting **Change Target Level**. Once a task is done, the target can no longer be changed.

**Note:** Managers can create shared goals for their reports from the Team page, and HR can create shared goals for any user from the People page.



## Rating your progress

### Knowledge and Certifications

When you open a challenge, you can rate whether you already have this knowledge or certification level with a simple yes/no. If no, you'll be prompted to start adding activities and working towards achieving the challenge. If yes, you can add the challenge to your profile and request validation from your manager. For private goals, you can choose to simply mark the challenge as done and add to your profile later on.

### Competencies

When you open a competency challenge, you'll see a list of tasks. These tasks are the behaviours that define your target level. Click a task to rate your current ability.

**In Progress:** If you're just getting started or getting there, you'll be prompted to start progress on the task. You can always click *Update Progress* to submit a new rating or click the 3-dot icon and select *Stop Progress* which returns the task to the To Do status.

**Not Applicable:** Depending on how your administrator has set up goals, you might be able to mark some tasks as not applicable. These tasks are excluded from progress calculations.

**Done:** If you've got or mastered a behaviour, you can add the competency to your profile and request validation from your manager for the task. The competency will appear on your profile with an in-progress icon until all of the tasks are validated. You'll need to complete the majority of tasks before a competency contributes to job matching scores. For private goals, you can choose to simply mark a task as done and add to your profile later on.

Once a challenge is marked as done and added to your profile, you can still change your rating. For example, a challenge that you previously rated as "got it", might now be one that you want to rate as "mastered it" as you continue to improve.

**Note:** If the same challenge is on two goals, task updates are applied to both. When you add an item to profile or complete a challenge, you'll notice that if the same challenge is on another goal at a lower level, it's automatically complete and marked as "Granted".

## Adding activities, learning resources, tips, and comments

**Activities:** For each task, you and your manager can build a custom list of activities you'll perform to accomplish this task. You can always edit, reorder, and remove items as needed.

**Learning Resources:** For competencies, you might have access to internal resources that you can add to your activities. Click *Resources* on a task and select *Browse the Catalog*. You can also open Udemy and LinkedIn Learning search results for competencies and knowledge. These suggestions can't be added to your activities, but they offer relevant classes to help you upskill.

**Tips:** For universal competencies, you might have access to practical suggestions that you can add to your activities. Click *Resources* on a task and select *Find Tips*.

**Comments:** Add comments to communicate with your manager about a task. The employee or manager receive an email and notification when a new comment is made on a shared goal. You can always edit and delete your own comments.

## Prioritizing challenges

You and your manager can prioritize challenges to identify the ones you're focussing on. Expand a goal and click the star icon beside any challenge. Click the *Priorities* tab on the top right of the page to view all your starred challenges in one place.

## Sharing and un-sharing goals

**Private:** Only the employee has access. The manager can see a goal exists, but they can't see the name or any details. Once shared, the manager receives a task and notification.

**Shared:** Both the employee and their manager have access and can make updates. Only the employee can make a shared goal they've created private.

1. Navigate to **Goals**.
2. Point to a goal and click the 3-dot icon.
3. Select **Share With Your Manager** or **Make Private** in the drop-down.

Refer to the table below for more detail on available actions in a shared goal:

Action	Employee	Manager
Rename goals*	Yes	Yes
Edit target levels*	Yes	Yes
Edit due dates	Yes	Yes
Manage activities	Yes	Yes
Add comments	Yes	Yes
Update task progress	Yes	Yes
Share / unshare goals	Yes, if employee created	No
Prioritize challenges	Yes	Yes
Archive / restore goals	Yes	No

\*Applies to specific strength goals. The name and targets of job goals can't be edited.

## Archiving goals

Goals can't be deleted, but you can archive goals to keep the page organized and up to date.

1. Navigate to **Goals**.
2. Point to a goal and click the 3-dot icon.
3. Select **Archive** in the drop-down.

The goal appears in the Archive at the bottom of the page. Archived goals can always be restored. Your manager can also still access and edit archived goals that are shared.

## Chapter 9

# Build a career path

### Discovering paths

In your CompetencyCore account, navigate to **Profile** in the main menu and click the **Explore Career Paths** link. To generate an automatic path, click the **Add target role** link. Type in your target role, select it from the drop-down, and click **Discover**.

### Exploring paths

To browse jobs, click **Explore**. You'll see a list of jobs at the next level displayed in tiles. The percentage on each tile shows how closely a job matches your profile. Click the **Show related roles** link to see roles at your current level.

Selecting a job tile displays similar jobs at the next level. Jobs are listed in descending order of similarity to the job selected at the previous level. Select a job from each level until you've found your target. You can only select one job per level.

**Note:** Jobs below your current job level and jobs with a 0% match to the job selected at the previous level don't appear when you're selecting a career path.

On the right side of the page, you'll see how well a selected job matches your profile by library type. Click the **Full Job Description** button to see an item by item comparison.

## Completing your path

To filter jobs by group, click **Filters**. Type in a name like "Finance" or "Human Resources" and select it from the drop-down. Your path is redrawn to display only jobs from that group. Once you're happy with the path, click **Complete Path**. Select whether to share or keep your path private. Keep in mind that shared paths are visible on pages accessed by your manager and HR.

## Managing your path

After confirming your path, it's displayed in the side panels so you can keep your path in mind when reviewing your profile. Click the title of a job in your path to see the details. Click the 3-dot icon to create a new path, make private, share, or delete.

## Chapter 10

# Manage your team

### Viewing your team

In your CompetencyCore account, navigate to **Team** to open a table listing all of your direct reports. If you don't see this option in the main menu, ask your administrator to turn on the Access My Team permission.

Click an employee's name to access their profile and goals. You can also click the job match score to review their strengths and gaps. The profile completion percentage lets you know if those gaps require development, or if the employee just hasn't completed their profile yet.

### Manager tasks

The Requests column displays a count of an employee's tasks that require your response or participation. Click a count to open the My Tasks page where you can start or continue a task. To see all tasks across your team where you're assigned as the manager, click **All Requests** on the top right of the page.

### Creating a goal

You can create goals for your reports directly from the Team page. Once created, the employee receives an email notification.

1. Navigate to **Team**.
2. Point to one of your direct reports and click the 3-dot icon.
3. Select **Create Goal** in the drop-down.
4. For a role, select a job, add a due date, and click **Create**.
5. For specific strengths, add a name, due date, and click **Create**.
6. Expand the specific strength goal and click **Add**.
7. Select competencies, knowledge, and certifications to add and click **Save**.
8. Click a challenge name to set a target level.

**Tip:** Check out the Set goals article to learn more.

## Diving deeper

A team icon indicates employees who report to you but who also have their own direct reports. Click this icon to see their team. Just like with your own team, you can access their profile, view each employee's strengths and gaps, and create goals. Use the breadcrumbs at the top of the page to navigate and to keep track of which team you're viewing.



# Chapter 11

## Perform an assessment

An assessment is a series of questions used to measure your skill levels against your current job or a job you're pursuing. Competency-based assessments help you and your manager see how closely your behaviours match those required. They also help identify strengths and areas for improvement. As part of your organization's HR process, you might be asked to assess yourself or another employee.

### Accessing self-initiated assessments

Whether you're taking on a new role or just curious about an opportunity, self-assessments are a great way to identify gaps in your profile.

1. Navigate to **Assessments > My Assessments**.
2. Click **Self-Assess** on the top right of the page.
3. Expand a group and select a job.
4. Click the gear icon and select **Perform Assessment**.

### Accessing assigned assessments

When an assessment is assigned to you, you'll receive an email with a link that opens the assessment. Click the link in the email you received.

OR

In your CompetencyCore account, click the list icon on the top right of your screen, find the assessment task, and click **Start**.

## Performing an assessment

1. Follow the steps above to access the assessment.
2. Review the rating scale that's being used and click **Next**.
3. Read the behavioural statement or question.
4. Select the level you think you're performing at.
5. Review your answers. A warning symbol means a question is incomplete.
6. Click a question name to return to it and select a response.
7. Click the **Review Complete** button at the bottom of the page.
8. Click **Submit** once you've completed the assessment.

**Caution:** You can't make changes to your responses after submitting.

## Chapter 12

# Browse learning resources

### Accessing learning resources

You can access learning resources from two areas in CompetencyCore:

**Learning Resources:** In your CompetencyCore account, navigate to *Learning Resources*. Resources are suggested based on the competencies required for your job. If you don't have a current role, suggestions are based on core competencies in your organization. They're grouped by type such as books, online courses, etc. You'll see up to three suggestions for each type, but you can adjust the number of rows displayed at the bottom of each table to view more. You can also follow the steps below to search for a specific resource.

**Goals:** If you or your manager has set goals in CompetencyCore, you can link learning resources. Navigate to *Goals*, expand a goal, and select one of your competency challenges. Click *Resources* on a task to open a list of resources associated to that competency. You can add a resource to your list of activities to help you achieve your goal.

### Searching for learning resources

1. Navigate to **Learning Resources**.
2. Select a tab before entering your search term.

- By resource: Displays resources that include the keywords you enter.
  - By competency: Displays resources associated to the competency you select.
  - By job: Displays resources associated to the competencies required on the job you select.
3. Click the **Show filters** button and select the resource types to include.
  4. If there are multiple languages installed, select a language. Click **Apply**.
  5. When searching by competency, you might be able to filter the results by proficiency level. Type in the name of a competency and select an option in the drop-down. You'll see a new Competency Levels filter appear. Select a level to narrow your search.
  6. Click the link icon if available to open a learning resource.

## Bookmarking learning resources

1. Navigate to **Learning Resources**.
2. Browse suggested resources or follow the steps above to search.
3. Click the bookmark icon to save a learning resource.
4. Click the **My Bookmarks** link to open a list of all your bookmarked resources.
5. Deselect the bookmark icon to remove a resource from your Bookmarks.

## Chapter 13

# Participate in job validation

### Roles in job validation

Your input on a validation survey helps build effective job descriptions. The options available to you depend on your role in the survey and the approval process selected by the dispatcher.

**Contributors:** Provide their feedback on the accuracy of a job description.

**Reviewer:** In a two-step process, the reviewer makes final selections from the responses submitted by contributors and then updates the job description. In a three-step process, the reviewer makes their selections and then sends the survey to the approver.

**Approver:** The approver sees contributor submissions and the reviewer's selections. The approver and reviewer can send the survey back and forth until the approver updates the job description.

### Accessing a job validation survey

For all participants, the first step is to access the validation survey. When a survey is assigned to you, you'll receive an email with a link that opens the survey. Click the link in the email you received.

OR

In your CompetencyCore account, click the list icon on the top right of your screen, find the job validation task, and click **View**.

## **Participating as a contributor**

### **Step 1. Provide feedback**

Review the job summary and requirements and click **Agree** or **Disagree**. If you disagree, you can enter your rationale. For competencies, you can also suggest a different level.

Click the disagree icon to see feedback from other contributors on job requirements (you can't see their feedback on the job summary). You can always change your decisions, but note that selecting **Agree** after disagreeing deletes your rationale.

If available, click the **Suggest** button to open a list of published items in Libraries that can be added to the job. Competencies you suggest are automatically grouped as Job-Specific.

### **Step 2. Submit the survey**

Once you've completed the survey, click **Submit**. Other participants can't see your responses until you submit.

### **Step 3. Resubmit the survey (optional)**

You'll receive a notification in CompetencyCore when another contributor makes a new suggestion. Revisit the survey to see these suggestions and to review responses from other contributors. You might want to change your feedback or share your opinion on newly suggested items. Until the reviewer closes the survey, you can re-submit as many times as needed to update your responses.

## Participating as the reviewer

### Step 1. Review feedback

Click **View** in the Feedback column to see the feedback provided.

### Step 2. Close and approve

Click **View** below Submissions to open a list of participants so you can see whose submission is still pending. Once all of the contributors have submitted the survey, click **Close** on the top right of the page. Click **OK** to confirm. Users can no longer submit the survey once closed.

Select the **Approve** checkbox beside the items you want to include on the published job. You can edit the job summary and requirements based on feedback from contributors, as well as create new items.

### Step 3. Publish the survey (two-step process)

Click **Publish** on the top right of the page. The current published version of the job is replaced with the completed survey. You can still access previous versions in the job's history.

OR (if there is an approver involved):

### Step 3. Send to the approver (three-step process)

Click **Send for Approval** on the top right of the page and click **OK** to confirm. If the approver sends the survey back to you, review their comments at the top of the page. Make your changes and then send the survey back to the approver.

## Participating as the approver

### Step 1. Review feedback

Click **View** in the Feedback column to see the feedback provided. Review the selections made by the reviewer and make changes if needed. You can edit the job summary and requirements based on feedback from contributors, as well as create new items.

## **Step 2. Send back to the reviewer (optional)**

Click **Back to Reviewer** on the top right of the page. Enter a comment and click **Send**. Once the reviewer sends the survey back to you, review their changes and publish the survey.

## **Step 3. Publish**

Click **Publish** on the top right of the page. The current published version of the job is replaced with the completed survey. You can still access previous versions in the job's history.



## Chapter 14

# Participate in a competency profiling exercise

Assigning competencies to jobs or job families requires input from employees. This input can be collected through competency surveys. If you've been invited to participate in a survey, it means your organization needs your help to make the best decision.

1. Click the link in the email you received OR
2. Click the list icon on the top right of your screen and click the survey name.
3. Read the description of your role as a Contributor and click **Start Survey**.
4. Click a competency name to open it in a new window. Turn on the switch beside up to four competencies and click the **Compare Competencies** button to view them all at once.
5. Select the competencies you think best characterize the organization, job family, or job. You might need to enter your rationale and select a competency level.
6. Click **My General Survey Comments** at the bottom of the page to expand a text box where you can enter overall feedback and click **Next**.
7. Review and click **Submit**.

**Caution:** You can't make changes to your selections after submitting.