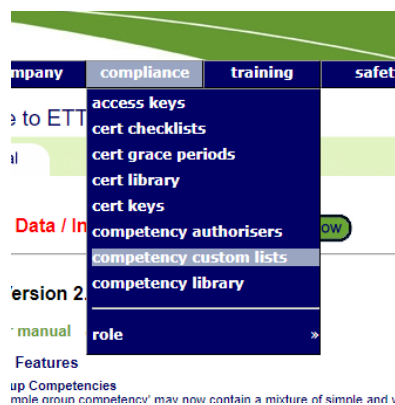


User Guide

Creating Custom Lists| Competencies

STEP ONE | Creating a custom list

Click on the 'Compliance' tab, select 'competency library'



Click add

Competency Custom Lists



There are no Competency lists defined in the site.

► Use the add button to create a new list.

Name your custom list and click 'save'

Add Competency Custom List

Name:

Description:

Click 'add' to add list values

View 'Medicals' Competency Custom List

NAME: Medicals
Description:
Created By: Felicity Stevenson

[edit](#)

LIST VALUES
None

[add](#)

Name values and click 'save'

Add 'Medicals' Competency Custom List Value

Value:

[cancel](#)

[save](#)

Assign competencies to the list values by clicking the green triangle

View 'Medicals' Competency Custom List

NAME: Medicals
Description:
Created By: Felicity Stevenson

[edit](#)

LIST VALUES

	Name	Assign	Assigned
<input type="checkbox"/>	Cat 1		0
<input type="checkbox"/>	cat 2		0
<input type="checkbox"/>	cat 3		0
	Total:		0

[add](#)

[remove](#)

Search for the cardholders and check the tick box, scroll to the bottom and click save. Once the screen has refreshed you will need to click 'return' to go the main list

Assign ' Medicals ' Competency Custom List Value ' cat 3 '

Competencies

- Inductions
- Licences
- Toolbox Talks
- All
- All with value:

list

List all competencies of the selected type and whether they currently have the 'cat 3' value

There are no Competencies to display.

return

Click 'lists' to be taken back to the main screen

View ' Medicals ' Competency Custom List

NAME: Medicals
Description:
Created By: Felicity Stevenson

edit

LIST VALUES

	Name	Assign	Assigned
<input type="checkbox"/>	Cat 1	▲	3
<input type="checkbox"/>	cat 2	▲	4
<input type="checkbox"/>	cat 3	▲	3
Total:			10

add

remove

- ▶ Use the add button to add a new value to this list
- ▶ Click a name to edit it
- ▶ Click the ▲ icon to assign a value to multiple competencies
- ▶ Use the remove button to permanently delete ticked values a

lists

N.B To use a list in reporting, it will need to be in your favorites.
Deleting a list will delete it from the whole site not just from your view.

Competency Custom Lists

add

FAVOURITES

List Name	Assignments	Values
<input type="checkbox"/> Medicals	10	3 (Cat 1, cat 2, cat 3)

move in/out favourites

delete list

NON-FAVOURITES