Pegasus™

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User Guide – Grouping Competencies
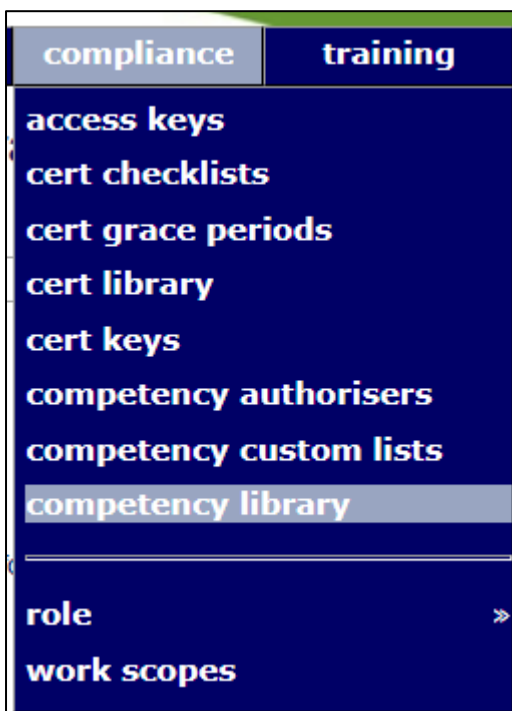
V25/03/2019 1.0

Grouped Competencies

Competencies in the Pegasus system are used as an object that can be assigned to a Cardholder, a Role or an Access Key. Used to inform administrators of qualifications or requirements.

Grouping competencies is an effective way to bundle similar competencies together, in order to more easily track if a cardholder is qualified.

Can be used for: Bundling superseded/duplicate/redundant competencies together so that to complete a Requirement, only one of those competencies in the group needs to be valid in order to stay complaint. E.g. Multiple Bulldozer Certificates bundled to one Competency name for simplicity.

Step 1 - Open Competencies
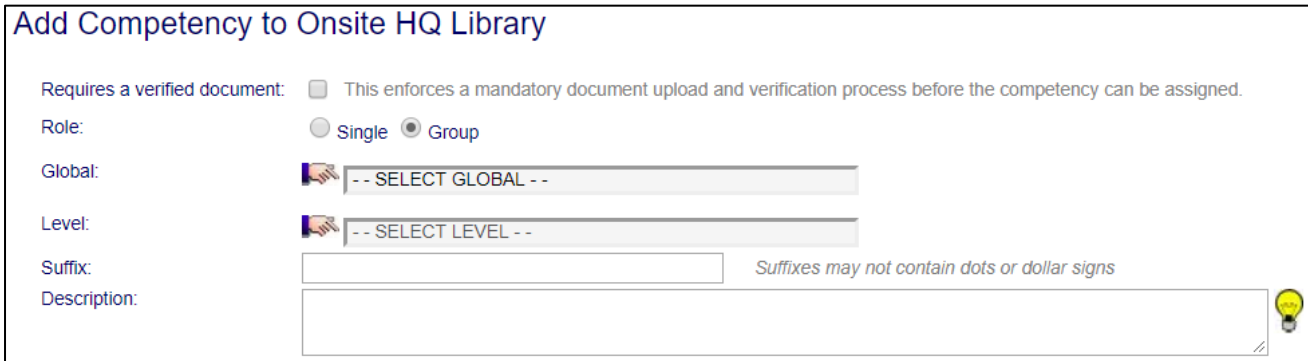
Open COMPLIANCE > COMPETENCY LIBRARY

This will open the complete library where you can search.

Note: By default if your site is a member of a Realm(s) it will tick to search through all realms you have access to. This can return a large number of unwanted results.

Step 2 – Create a Group Competency

As we want to create a NEW GROUP competency, we don't want to search, but instead press "add".

Adding brings up a new page with options:

Requires a Verified Document: – this competency will need a document to be uploaded against it for it to be valid. Document will also need to be validated by someone as to its authenticity.

Role: Single or Grouped Competency

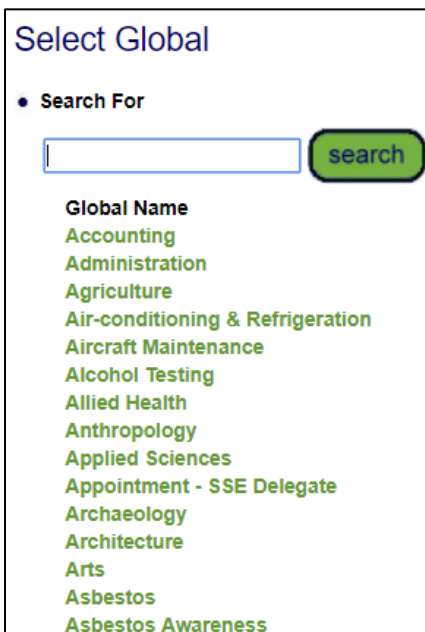**Global**: Predefined Competency Labels for the Main Title of this Competency

Level: Predefined Sub-Levels of the Global label selected. Depending upon the selected Global, only certain options will be available.

Suffix: The user configurable title you are giving the competency itself. Relevant to the Role you are giving it.

Description: Text field to help administrators or other users of the system to read any notes or comments related to the creation of this competency and why it was created. (optional field)

Step 3 – Selecting Global

Selecting the hand icon next to the GLOBAL option will open a new page. This page will allow us to search and choose from a number of pre-defined titles for the top level of the Competency.

In this example we will choose OPERATOR

Step 4 – Selecting Level

Now that a Global level has been selected, when we click on the LEVEL hand icon, only the relevant designated level option will become visible for this "Operator" competency.

We can see a number of Levels listed here, we will choose "Statement of Competency" in this example. Then click "continue"

Step 5 – Adding Suffix

The Suffix is the most important part of this Competency. This is the section that the create can enter in their own text. In order to eliminate duplicates, searches should have been carried out in advance to ensure that a similar or even an exactly names competency is not being created.

We are giving this Suffix the name "Bulldozer-Caterpillar-10TonnePlus and a relevant description so that anyone looked at this grouped competency will know what it is related to.

Once all completed, press Save.

The Group Competency *Operator.Statement of Competency.Bulldozer-Caterpillar-10TonnePlus* is now created.

Step 6 – Adding members to a Group Competency.

Adding Competencies to a group is as simple as clicking the "add member" button. This will launch the search function and you can then search for the competencies you wish to group under this.

In this example we are searching for operator competencies that currently exist.

Some existing ones have appeared. Adding that particular competency is done by clicking on the name.

This has now added one competency again this Group.

Verified	Name	Owner	Assignment Steps PT TR AS AU AP	Duration	Active	Delete
	Operator Dozer.Qualified.Cat D11R	Site: Onsite HQ	PT TR AS AU	2 Years	✓	delete

Members

add member

Lets all them all. Click again on "add member". Now you can see the search results are missing the one that's already added. Lets add the other three using the same steps.

operator   search

Found 3 matches

Verified	Competency Name	Owner	Assignment Steps PT TR AS AU AP	Duration
	Operator Dozer.Certificate.Bulldozer-CAT-70HR	Site: Onsite HQ		non-specified
	Operator Dozer.Licence.CAT-20H	Site: Onsite HQ		non-specified
	Operator Plant.Statement of Attainment.CAT-40HR	Site: Onsite HQ		non-specified

Now all those selected competencies have formed this Grouped Competency.

Members

Verified	Name	Owner	Assignment Steps PT TR AS AU AP	Duration	Active	Delete
	Operator Dozer.Certificate.Bulldozer-CAT-70HR	Site: Onsite HQ		non-specified	✓	delete
	Operator Dozer.Licence.CAT-20H	Site: Onsite HQ		non-specified	✓	delete
	Operator Dozer.Qualified.Cat D11R	Site: Onsite HQ	PT TR AS AU	2 Years	✓	delete
	Operator Plant.Statement of Attainment.CAT-40HR	Site: Onsite HQ		non-specified	✓	delete

Return to our Competency library as per Step 1.

Search for our new Operator competency. Viewing will now show our group competency when we click on it

Operator.Statement of Competency.Bulldozer-Caterpillar-10TonnePlus GROUP

Role:	**GROUP Competency**
ID:	87534
Global:	Operator
Level:	Statement of Competency
Suffix:	Bulldozer-Caterpillar-10TonnePlus
Description:	for anyone qualified to drive a Caterpillar Bulldozer rated at 10Tonne weight or higher.
Owner:	**Site: Onsite HQ**
Location:	**Onsite HQ**
Created By:	Damien Challen
Is Active:	✓

recalculate renewals

Custom Lists

Migrate To Realm
Can't migrate a group competency

back   **edit** 🔄   **delete**

Members

Verified	Name	Owner	Assignment Steps					Duration	Active	Delete
			PT	TR	AS	AU	AP			
	Operator Dozer.Certificate.Bulldozer-CAT-70HR	Site: Onsite HQ						non-specified	✓	delete
	Operator Dozer.Licence.CAT-20H	Site: Onsite HQ						non-specified	✓	delete
	Operator Dozer.Qualified.Cat D11R	Site: Onsite HQ	PT	TR	AS	AU		2 Years	✓	delete
	Operator Plant.Statement of Attainment.CAT-40HR	Site: Onsite HQ						non-specified	✓	delete

add member

▶ When this group competency is being assessed in any context it will only be satisfied by cardholders who have one or more member competencies current.