



PegasusTM
Powered by Onsite

User Guide – Grouping Competencies

V25/03/2019 1.0

Grouped Competencies

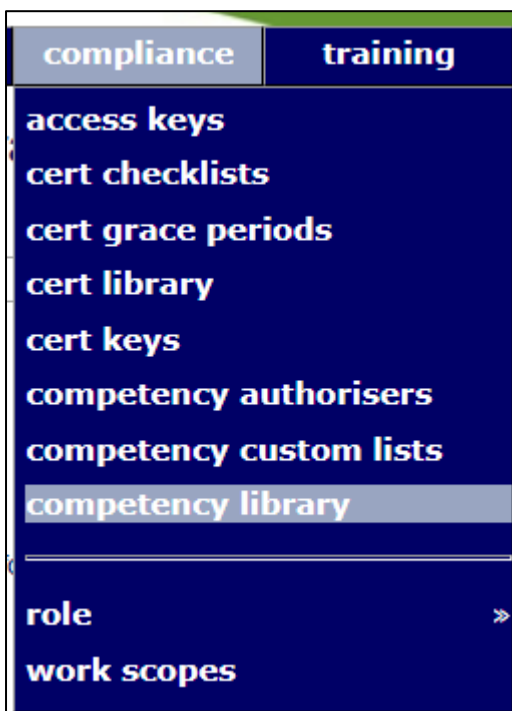
Competencies in the Pegasus system are used as an object that can be assigned to a Cardholder, a Role or an Access Key. Used to inform administrators of qualifications or requirements.

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Can be used for: Bundling superseded/duplicate/redundant competencies together so that to complete a Requirement, only one of those competencies in the group needs to be valid in order to stay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

Step 1 - Open Competencies

Open COMPLIANCE > COMPETENCY LIBRARY



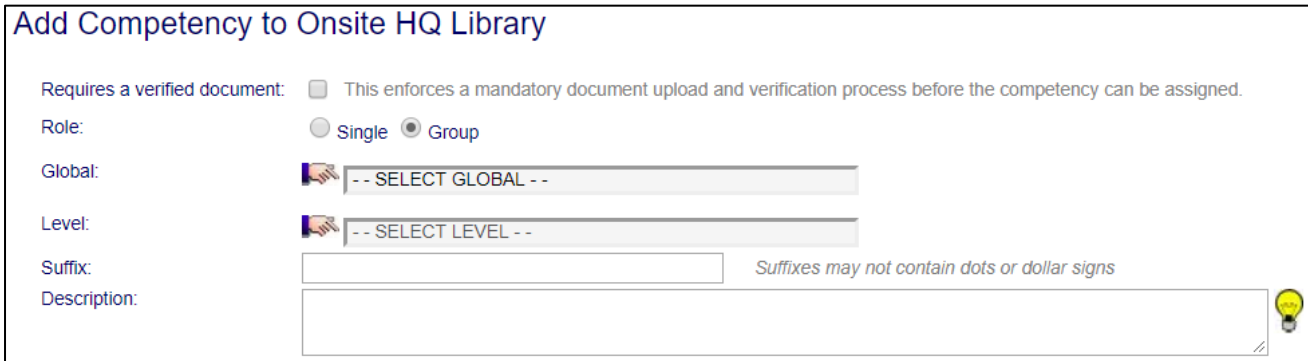
This will open the complete library where you can search.

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.

A screenshot of the 'Competency Library for Onsite HQ' search interface. It features a search box on the left with a green 'search' button. To the right of the search box are several checkboxes: 'Include competencies from' (checked), 'Include hidden realm competencies' (unchecked), 'Group by location' (unchecked), and 'Include Inactive' (unchecked). A dropdown menu is open next to the 'Include competencies from' checkbox, showing options: '-- All Realms --', '-- All Realms --', 'Onsite Test', and 'Pegasus Demo'. A green 'add' button is located on the far right. Below the search box, it says 'Ready to search'. At the bottom, there is a blue arrow icon followed by the text: 'Leave search box blank for all competencies in Onsite HQ and selected realm(s), or enter a text fragment to find matching competency names.'

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".



The screenshot shows a form titled "Add Competency to Onsite HQ Library". It includes several fields and options:

- Requires a verified document:** A checkbox with the text "This enforces a mandatory document upload and verification process before the competency can be assigned."
- Role:** Radio buttons for "Single" and "Group", with "Group" selected.
- Global:** A dropdown menu with a hand icon and the text "-- SELECT GLOBAL --".
- Level:** A dropdown menu with a hand icon and the text "-- SELECT LEVEL --".
- Suffix:** A text input field with a note: "Suffixes may not contain dots or dollar signs".
- Description:** A large text area with a lightbulb icon in the bottom right corner.

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

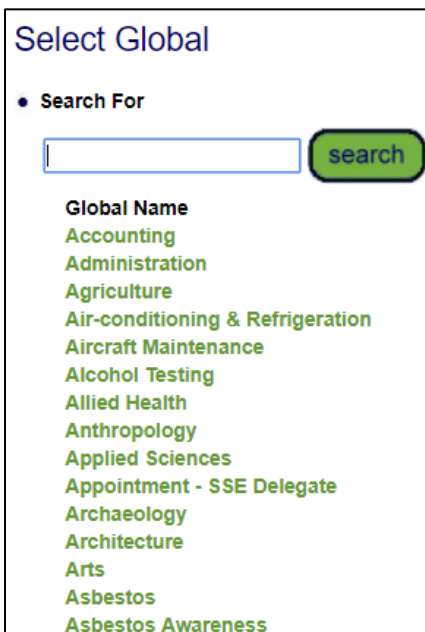
Level: Predefined Sub-Levels of the Global label selected. Depending upon the selected Global, only certain options will be available.

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.



The screenshot shows a page titled "Select Global". It features a search bar with a "search" button and a list of predefined global names:

- Global Name
- Accounting
- Administration
- Agriculture
- Air-conditioning & Refrigeration
- Aircraft Maintenance
- Alcohol Testing
- Allied Health
- Anthropology
- Applied Sciences
- Appointment - SSE Delegate
- Archaeology
- Architecture
- Arts
- Asbestos
- Asbestos Awareness

In this example we will choose OPERATOR

Global:  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.

Select Level for Operator

▶ Here are the Levels currently associated with this Global.
▶ Select the Level you want to use and click **continue**.

<input type="radio"/> Competency	<input type="radio"/> Class 7	<input type="radio"/> VOC
<input type="radio"/> Doctoral Diploma	<input type="radio"/> Class 8	<input type="radio"/> Work Experience
<input type="radio"/> Certificate III	<input type="radio"/> Course	<input type="radio"/> Authorised
<input type="radio"/> Certificate	<input type="radio"/> Licence	<input type="radio"/> Awareness
<input type="radio"/> Certificate of Competency	<input type="radio"/> Permit to Train	<input type="radio"/> Statement of Attendance
<input type="radio"/> Induction	<input type="radio"/> Limited Supervision	<input type="radio"/> Qualified
<input type="radio"/> Assessment	<input type="radio"/> Trainee	<input type="radio"/> -
<input type="radio"/> Reassessment	<input type="radio"/> Trained	<input type="radio"/> Certificate of Attendance
<input type="radio"/> Class 1	<input type="radio"/> Familiarisation	<input type="radio"/> Procedure
<input type="radio"/> Class 2	<input type="radio"/> Test & Move	<input type="radio"/> Appointed
<input type="radio"/> Class 3	<input type="radio"/> Provisional	<input type="radio"/> High Risk Licence
<input type="radio"/> Class 4	<input type="radio"/> Statement of Attainment	<input type="radio"/> OEM Training
<input type="radio"/> Class 5	<input checked="" type="radio"/> Statement of Competency	<input type="radio"/> Endorsement
<input type="radio"/> Class 6	<input type="radio"/> Letter of Competency	<input type="radio"/> Operate

NOTE: Levels with red names are **not recommended** as they can be specified as Assignment Steps. Use Assignment Steps instead of Levels to keep your library compact and to aggregate the whole assignment process into a single record. Contact your Onsite representative for more information.


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.


Requires a verified document: This enforces a mandatory document upload and verification process before the competency can be assigned.

Role: Single Group

Global:  Operator

Level:  Statement of Competency

Suffix: Bulldozer-Caterpillar-10TonnePlus Suffixes may not contain dots or dollar signs

Description: for anyone qualified to drive a Caterpillar Bulldozer rated at 10Tonne weight or higher. 

Location: Onsite HQ ▼

Created By: Damien Challen

Is Active:

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.


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** [recalculate renewals](#)
Created By: Damien Challen
Is Active:

Custom Lists

Migrate To Realm

Can't migrate a group competency

[back](#) [edit](#)  [delete](#)

Members

(none)

[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.
- ▶ As **this group has no members** it is not functional yet.

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.

Add Member to Operator.Statement of Competency.Bulldozer-Caterpillar-10TonnePlus

[search](#)

Found 4 matches

Verified Competency Name	Owner	Assignment Steps					Duration
		PT	TR	AS	AU	AP	
Operator Dozer.Certificate.Bulldozer-CAT-70HR	Site: Onsite HQ						non-specified
Operator Dozer.Licence.CAT-20H	Site: Onsite HQ						non-specified
Operator Dozer.Qualified.Cat D11R	Site: Onsite HQ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2 Years
Operator Plant.Statement of Attainment.CAT-40HR	Site: Onsite HQ						non-specified

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.

Members

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

[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.

[search](#)

Found 3 matches

Verified	Competency Name	Owner	Assignment Steps					Duration
			PT	TR	AS	AU	AP	
	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					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

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** [recalculate renewals](#)
Created By: Damien Challen
Is Active:

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	<input checked="" type="checkbox"/>	delete
	Operator Dozer.Licence.CAT-20H	Site: Onsite HQ						non-specified	<input checked="" type="checkbox"/>	delete
	Operator Dozer.Qualified.Cat D11R	Site: Onsite HQ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2 Years	<input checked="" type="checkbox"/>	delete
	Operator Plant.Statement of Attainment.CAT-40HR	Site: Onsite HQ						non-specified	<input checked="" type="checkbox"/>	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.