ADMINISTRATOR TRAINING GUIDE

COMPETENCY MANAGEMENT & DEVELOPMENT SYSTEM (CMDS)

Access the Competency Db
Go to the CMDS website http://keyeracmds.com/ and select the Competencies tab. Then select "Competency Db" from the right hand options. That will send you to the Competency Db, log in using your login ID and password.

Administrator Menu
If you are an authorized administrator, there will be an 'Administration' button on your menu. The Administration Menu will be displayed as follows:

Groups
- *Group Education Update*
- *Group Time Sensitive Update*
- *Group Email*

Reports
- *Export*
- *Review Export Requests*
- *Instant Export*
- *Report*
- *Review Report Requests*
- *Instant Report*

Users
- *User Directory*
- *User Profiles*
- *Approve New Users*
- *Approve Profile Request*
- *Assign Validator*
- *Assign Time Sensitive Type*
- *Email User*

Users

Approve New Users

1. After you have accessed the administrative option, click on the **'Approve New Users'** button. This page will display any requests for access that have been submitted for approval. It is the responsibility of the administrator to ensure an actual employee of the company has submitted the request.

2. You may then assign a department by clicking on the down arrow in the **'Assign Department'** field. Choose either **'Yes'** or **'No'** to create a new account. Then click on **'Submit Request'**. The candidate can then log in to the system to request a profile for self-assessment, or, if you have not approved the request, the account will not exist.

User Directory

1. Click on **'User Directory'** and the alphabet will be displayed along the top. Simply click on the appropriate letter that represents the first letter of the last name of the person's record you with to view. There is also an **'ALL'** button to view all names.

2. A listing of all employees under the alpha character you chose, who are registered on the system, will be displayed.

3. Click on the name of the person's record you wish to view. The person's name will be displayed and underneath that, buttons for general information, personal information, educational, employment, designations, accomplishments and all information. This allows you to see a specific item or see the entire record.

HOT TIP: 'General Information' contains the User's ***login ID*** *and* ***email*** *information – this may be what you are asked for most.*

User Profiles

1. To view an employee's profile, click on the **'User Profiles'** button. Again, the letters of the alphabet will be displayed and you only need to click on the appropriate letter. After you click on the person's name, his profile information will be displayed.

2. All profiles for this person will be listed as well as **'All Competencies'**. Click on the number beside the profile you wish to view or on **'All Competencies'**. The far right side of the page will display the status of each competency.

Approve Profile Request

1. After accessing the administrative system, click on the **'Approve Profile Request'** button.

2. A list of requests will be displayed showing the employee name and the profile requested. Following this, there is an 'Action' request – click on **'Grant Profile'** if the request is legitimate. If not, you may click on **'Purge'** this record (Profile Not Granted)' and nothing will come of the request, although the administrator does have the personal information provided by the candidate if you wish to follow up.

3. Then click on **'Submit Request'**. The candidate can then log in to the system to complete the self-assessment, or, if you have not approved the request, the request will not exist.

4. For most companies, the Auto Approve feature is used. This allows the candidate to choose a profile and have it automatically approved. This eliminates the need for administrative supervision and prevents any delays for the candidate in completing self-assessments. However, if your company requires an approval process, it will be necessary to access this page on a regular basis to check for any new requests.

Assign Validator

1. After accessing the administrative system, click on the **'Assign Validator'** button.

2. The alphabet will be displayed. Choose the proper letter and afterwards the name of the person for whom you want to assign a validator. The person's name will be displayed. You will notice there are drop down lists for 'Assign Validator' and for 'Rule'. Click on the down arrow for the validator's' names and assign the appropriate validator. To assign the proper rule, click on the down arrow and choose the first option **'Do you agree?'** This is the rule that most companies have chosen to use for validation.

3. Then click on **'Submit Request'** and the validator is automatically assigned.

Assign Time Sensitive Type

1. After accessing the administrative system, click on the **'Assign Time Sensitive Type'** button under the Administration Menu.

2. The alphabet will be displayed. Choose the proper letter and afterwards the name of the person for whom you want assign a specific time sensitive type. The person's name will be displayed and underneath that, a list of all time sensitive items relevant to your site. Click on the drop down arrow of the appropriate time sensitive item, and then choose either **'Compulsory'** or **'Optional'**. This function has been added to allow each person at a facility to have an accurate record of his or her information. What may be 'Compulsory' for an Operator may be 'Optional' for an Administrator or Mechanic. This allows the information to be 'Person' specific and not just 'Site' specific.

Email User

1. After accessing the administrative system, click on the **'Email User'** button. A new page is displayed allowing the administrator to email a specific user. Simply enter the Subject and Message and click on **'Send Email'**.

Reports

1. After accessing the administrative system, click on the **'Reports'** button.

2. You will see buttons for 'Export' and 'Report'. To clarify, an export is a report that is delivered in a spreadsheet format so the administrator can reformat the data to suit the users of the report. A report is formatted by the system and cannot be changed after delivery. You will also see the buttons 'Review Export Requests' and 'Review Report Requests'. These pages capture Instant Export and Instant Report requests and allow the administrator to manage these requests.

3. Currently, there are 7 reports. Click on the report desired. A list of parameters will be displayed. You may choose your requirements from the drop down lists. When you have selected all the parameters, click on the **'Generate Report'** button and the report will be generated and then emailed to you.

HOT TIP: It is very important to keep your email address current in your personal information so that reports are mailed to the correct address.

4. Order any of the reports in the same way, clicking on the desired parameters.

5. Click on **'Review Export Requests'** or **'Review Report Requests'** to check to see when a report was requested or to delete requests.

6. There is the option of running an Instant Report. Click on **'Instant Report'** and choose the desired parameters, and the report will be generated in a matter of moments and then displayed on the screen.

7. Currently, there are 6 exports. Click on **'Export'**, choose the parameters in the same way and the export will be emailed to you.

8. To generate an Instant Export, choose the desired parameters, and a spreadsheet is created with the link shown on the page. Right click on the link and follow the directions on the page.

NOTE: If you cannot receive reports due to your company security settings, please contact your local IT department.

***Exports** are excel (.xls) spreadsheets that are generated and emailed at specific times of the day.*

Standard Exports

Export #1.	Competency by Person
Export #2.	Time Sensitive by Person
Export #3.	Competency Levels
Export #4.	Levels Special Summary
Export #5.	Profile Special Summary
Export #6.	Recent User Expiry

Select Saved Export

1. ***Profile details for users by profile levels *****
2. *Time sensitives by dept.*
3. ***Profile details for users regardless of profile levels *****
4. *Individual summary by profile regardless of level*
5. *Individual summary by profile levels*
6. *Expired time sensitives and competencies by User.*

Reports ***are generated html pages and are emailed at specific times of the day.***

Standard Reports

Report #1.	Assessed Candidates
Report #2.	Time to Expiry
Report #3.	Person by Time to Expiry
Report #4.	Time Sensitive by Person
Report #5.	Time Sensitive Summary
Report #6.	Competency Levels
Report #7.	Time Sensitive Expiry

Select Saved Report

1. *Profile by level summary - % complete*
2. *Profile by competency, by level, Area summary - % complete*
3. *Person by competency summary*
4. *Specific time sensitive by holders summary*
5. *Specific time sensitive by area survey*
6. *Profile summary by person*
7. *All time sensitives summary*

Groups

Group Education Update

This functionality allows the administrator to enter data on behalf of employees. If there are a number of people who have the recently acquired the same educational course or certificate, the administrator may complete a mass entry. Complete all of the required fields, and then click on the **'Continue'** button and a list of all the people in your department will be displayed with checkboxes beside their names. Simply click the boxes beside the appropriate names, and then click on **'Submit Changes'**. The records of the people you chose will be automatically updated.

Group Time Sensitive Update

This functionality mimics the Group Education Update and allows the administrator to enter data on behalf of employees. If there are a number of people who have the recently acquired the same time sensitive course, the administrator may complete a mass entry. Complete all of the required fields, and then click on the **'Continue'** button and a list of all the people in your department will be displayed with checkboxes beside their names. Simply click the boxes beside the appropriate names, and then click on **'Submit Changes'**. The records of the people you chose will be automatically updated.

Group Email

This functionality allows the administrator to send an email to all the people within the department the administrator works in. Simply enter the Message and click on **'Send Email'** and the system will send the email to everyone within the specified department.