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Introduction

About this User Manual

Welcome to the Competence Observatory user manual. The Competence Observatory project is part of the TENCompetence project.

TENCompetence is funded by the European Commission through the IST Program. It is developing and using infrastructure to support individuals, groups and organizations in lifelong competence development.

This manual is targeted towards people who are new to the TENCompetence software. It is composed of little chunks of information that take you step-by-step through the TENCompetence processes.

When you have followed the instructions in the manual, you will be ready to operate the TENCompetence software fully independently.

Introduction to TENCompetence

TENCompetence will support individuals, groups and organizations in Europe in lifelong competence development by establishing the most appropriate technical and organizational infrastructure, using open source standards-based, sustainable and innovative technology.

TENCompetence is a 4-year EU-funded Integrated IST-TEL project that will develop a technical and organizational infrastructure for lifelong competence development. The infrastructure will use open-source, standards-based, sustainable and innovative technology. With this freely available infrastructure the European Union aims to boost the European ambitions of the Knowledge Society, by providing all European citizens, SMEs and other organizations easy access to facilities that enable the lifelong development of competencies and expertise in the various occupations and fields of knowledge.

TENCompetence will support the creation and management of networks of individuals, teams and organizations in Europe who are actively involved in the various occupations and domains of knowledge. These 'learning networks' will support the lifelong competency development of the participants from the basic levels of proficiency up to the highest levels of excellence. The network consists of learners, educational institutes, libraries, publishers, domain specific vendors, employers, associations, and all others who deliver services or products in the specific field.

Learning Networks

The learning networks include:

- competency frameworks for the different occupations/fields of knowledge
- formal as well as informal learning facilities, including the sharing of knowledge, learning activities, units of learning and learning programs
- the learning of individuals as well as of teams and organizations
- all levels of learning: primary, secondary and tertiary education, adult and company training and other forms of informal learning
- social exchange mechanisms to stimulate the exchange, sharing and support between the individuals, teams and organizations within the network.

**Project Details**

The project will:

- develop new innovative pedagogical approaches, assessment models and organizational models for lifelong competence development
- develop software for the effective support of users who create, store, use and exchange knowledge resources, learning activities, units of learning and competence development programs within a learning network
- integrate isolated models and tools for competence development into a common, easy to use infrastructure
- run pilots, at least in the field of digital cinema, health care, water management and lifelong learning cities, to ensure the validity and viability of the approach
- deliver training programs to learn users how to work with the infrastructure, and to train instructors and companies (specifically SMEs) to deliver services using the infrastructure
- build a growing network of associated partners to ensure large-scale use in Europe.
Getting Started

Some Concepts explained

Before you start working with TENCompetence, you should be familiar with the following concepts:

**Competency**

A competency is any kind of qualification or ability, both formal and informal, a person should have in order to fulfill a particular task or job. To be managed, competencies must be observable and measurable.

E.g.: accuracy, expressing oneself in English, etc.

A competency as such has is not useful; it is merely an indication of a qualification or ability. It only becomes useful in a particular context.

The competency is the lowest level in the Competence Observatory hierarchy. A competency is not interpreted by any kind of organizational context. It can be re-used in different application contexts in order to contextualize them.

**Context**

A context is any kind of circumstance or environment in which a competency becomes useful. In other words, the competency gets contextualized.

This environment refers to the real world. For instance: the competency accuracy has a different meaning in an engineering environment than in an editorial environment.

**Contextualized Competency**

A contextualized competency is a competency that is interpreted in a particular context. This contextual interpretation may have a specific meaning that overrides the meaning of the non-contextualized competency it is based on.

The competency leadership for instance, may have a specific, more detailed meaning when used in the context of an application for an IT company than the general meaning, which is: the ability to give structured and declarative directions to people.

Contextualized competencies are re-usable amongst different application profiles. A contextual competency which is defined in a specific context may be re-used in a competency profile that is built for another context.

**Competency Profile**

A competency profile is an aggregation of contextualized competencies. Calculating the gap of competencies is done on the competency profile level.
Application Domain

The application domain corresponds to the departments of a company. It is possible to have different contexts per department.

Each type of application that uses the Competence Observatory platform is associated to a unique application domain. The application domain is subdivided into a number of contexts.

Artefact

Artefact is a collective name for any entity that has to do with competencies, like people, roles, tasks, learning objects, etc.

Starting up

In order to log on to the Competence Observatory, you need to dispose of a user name and a password to get access to the website http://192.168.0.106:8080/ui/app.

To start up The Competence Observatory

2. In the **Login** field, type your user name.
3. In the **Password** field, type your password.
4. Click the **Sign in** button.

The following screen will appear.

5. In the **Application domain** field, select the application domain of your choice.
   The application domain corresponds to the departments of a company. It is possible to have different contexts per department.
6. In the **Language** field, make sure the correct language is selected.
7. Click the **Continue** button.
   - If everything has been entered correctly, you will get access.

**Looking up data**

The way of looking up data is consistent throughout the application. This topic describes how to look up a competency. Act analogously for other kinds of data you can look up in The Competence Observatory.

There are two ways of looking up competencies: a basic search only on the label of the competency and an advanced search on the basis of more selection criteria.

**To look up a Competency quickly**

1. In the menu, click **Competencies**.
   The following screen will appear:
2. Make sure the **BASIC** search option is marked.

3. In the **Label** field, type (a part of) the name of the competency you are looking for.

4. Click the **Search** button.
   
   A list of competencies matching your search criterion is displayed.

5. In the **Actions** column, click on the **View** link of the competency you were looking for.

**To look up a Competency based on several Selection Criteria**

1. In the menu, click **Competencies**.
The following screen will appear:

2. Make sure the **ADVANCED** search option is marked. More search fields appear.
3. Type a free combination of selection criteria in the fields in order to find the competency you are looking for.
4. Click the **Search** button. A list of competencies matching your search criteria is displayed.
5. In the **Actions** column, click on the **View** link of the competency you were looking for.
What can you do in the Competence Observatory?

The Competence Observatory workflow is as follows:

- Setting up the Competencies (p. 14)
  Quite often this step will be done automatically by means of feeding interfaces from other programs. If you want to do it manually:
  - Maintaining Contexts (p. 15)
  - Creating Artefacts (p. 19)
  - Maintaining Competencies (p. 14)
  - Contextualizing Competencies (p. 16)
  - Creating Competency Profiles (p. 22)
Setting up the Competencies

Maintaining Application Domains

An application domain represents the divisions or departments of a company. You can create as many application domains as you see fit. An application domain is divided into contexts.

To create an Application Domain
1. In the menu, click Application domains.
2. Click the Add new link.
3. In the Name field, type a name for the new application domain.
4. Click the Save button.

To delete an Application Domain
1. In the menu, click Application domains.
2. In the Actions column of the application domain of your choice, click the Delete link.
3. Click the OK button to confirm.

Switching to another Application Domain

It is possible to switch to another application domain rapidly.

To switch to another Application Domain
1. In the menu, click Home.
2. In the Application domain field, select the application domain of your choice.
3. Make sure in the Language field the correct language is selected.
4. Click the Continue button.

Working with Competencies

Maintaining Competencies

Competencies are a combination of knowledge, skills and attitudes of a person in order to perform a task. They are the bottom layer of the competency management framework and are not interpreted by any kind of organizational context. They are used to build contextualized competencies.

To create a Competency
1. In the menu, click Competencies.
2. Click the Add new link.
   The following screen will appear:
3. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
</table>
| **Label**   | Type the name of the competency.  
E.g. *English proficiency*  
If you want to translate the label into another language, click the *Edit* link behind the field. |
| **Description** | Type the descriptive, declarative name of the competency.  
E.g. *Good expression in English, both written and oral* |
| **Keyword**  | Type the keywords by means of which the competency can be looked up in the system.  
E.g. *language proficiency speak well read write* |

4. Click the **Save** button.

**Looking up Competencies**

For more information, refer to *Looking up data* on page 10.

**Working with Contextualized Competencies**

**Maintaining Contexts**

A context is an environment in which a competency is used, like education, manufacturing, automotive industry, etc. It can be as broad or as narrow as you define it.

*To create a Context*

1. In the menu, click **Contexts**.
2. Click the **Add new** link.
3. In the **Name** field, enter the name of the context.
4. Click the **Save** button.

**To delete a Context**

1. In the menu, click **Contexts**.
2. Scroll through the table of contexts using the buttons <, <<, > or >>.
3. In the **Actions** column of the context of your choice, click the **Delete** link.
4. Click the **OK** button to confirm.

**Contextualizing Competencies**

In order to make competencies useful, you have to assign them to a context. Before you can start contextualizing competencies, you need to dispose of contexts and scales. For more information, refer to **Maintaining Contexts** on page 15 and **Creating Scales** on page 18.

A contextualized competency is based on a competency. It may have a more specific meaning than the competency it is based on. The competency *leadership* for instance, meaning *the ability to give structured and declarative directions to people*, may have a more specific and more elaborate meaning in the context of an application for an IT job. Typically, the application will explain what it means by leadership.

Contextual competencies are re-usable among contexts.

Contextual competencies have **rules** applied to them, like *all* or *any*. The rule *all* for instance, implies that you need to be proficient in all of the child contextual competencies, in order to be proficient in the parent contextualized competency, in case the relation between parent and child contextual competency is *composed of*. The rule *any* for instance, would imply that you only need to be proficient in one of the child contextual competencies in order to be proficient in the parent contextual competency.

You can nest contextualized competencies in tree structures or network structures of competencies in order to create (hierarchical) **relationships**.

**To contextualize a Competency**

1. In the menu, click **Contextual competencies**.
2. Click the **Add new** link that has appeared.
   
   The following screen will appear:
3. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td>Select the context for which you want to contextualize the competency.</td>
</tr>
<tr>
<td>Competency</td>
<td>Click the Link <em>Go and search a competency</em> and select the competency of your choice.</td>
</tr>
<tr>
<td>Label</td>
<td>Type a name for the competency valid for the selected context.</td>
</tr>
</tbody>
</table>
| Rule        | Select if ALL or ANY of the possible child competencies assigned to this contextualized competency have to earned before the parent contextualized competency is earned.  
  - **ALL**: You need to be proficient in all child competencies in order to become proficient in the parent contextualized competency.  
  - **ANY**: You need to be proficient in one of the child competencies in order to become proficient in the parent contextualized competency. |
| Description | Type a longer description for the contextualized competency. |
| Proficiency level | Select the scale in which the proficiency levels are expressed. For more information about scales, refer to *Creating Scales* on page 18.  
  In the field directly underneath, select the proficiency level of the contextualized competency. |
| Keywords    | Type some keywords as metadata to the contextualized competency. |

4. Click the **Save** button.
To nest Contextualized Competencies

1. In the menu, click Contextual competencies.
2. Look up the contextualized competency of your choice.
3. In the Actions column of the contextualized competency of your choice, click the Update link.
4. At the bottom of the screen, click the Add child link.
5. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role for children</td>
<td>Select how the parent contextualized competency relates to its child contextualized competency. Is the first one a part of the second or the other way around?</td>
</tr>
<tr>
<td>Weight scale</td>
<td>Select the weight scale.</td>
</tr>
<tr>
<td>Weight</td>
<td>Select the weight. Indicates the level of importance of the child to the parent.</td>
</tr>
<tr>
<td>Rule for children</td>
<td>Select if ALL or ANY of the other competencies assigned as children to the parent contextualized competency have to be taken into account.</td>
</tr>
</tbody>
</table>

6. Click the Search link in order to look up the child contextualized competency.
7. Look up the contextualized competency of your choice.
8. In the Actions column of the contextualized competency of your choice, click the Select link.
9. Click the Save button.
10. Repeat steps 4 through 9 for all contextualized competencies you wish to assign as children.

Tip: You can also nest contextualized competencies in nested contextualized competencies. Note that there are Add child links in different hierarchical places.

Looking up Contextualized Competencies

For more information, refer to Looking up data on page 10.

Creating Scales

Per application domain you have to make sure there are levels of proficiency for competencies. These levels of proficiency are expressed in scales consisting of scores.

A scale is a set of proficiency levels, each having a score, like a three-level scale, consisting of the levels: bad – intermediate – good.

Typically, these are classification ranges like initiation, intermediate, expert, or moderate, good, excellent, etc.

To create a Scale with Proficiency Level Scores

1. In the menu, click Scales.
2. Click the Add new link.
3. Enter at least the mandatory fields:
**In field...** | **Do the following...**
--- | ---
Name | Type the name of the scale.  
*E.g.: three-level scale*
From | Enter a start value for the scale.  
*E.g.: In a three-level scale, 1 might be the start value.*
To | Enter an end value for the score.  
*E.g.: In a three-level scale, 3 might be the end level.*
Type | Select the type of the scale:  
• Proficiency: for a normal scale consisting of proficiency levels  
• Weight: for a weighted average scale.
Is verbose | Make sure this check box is marked if you want to be able to give a name to the scale, and not only a value.

4. Click the **Save** button.
5. In the table of scales, click in the **Actions** column the **Scores** link of the scale of your choice.
6. Click on the **Add new** link on the right hand side in order to specify the scores (or proficiency levels) of the scale involved.
7. Enter the following fields:

| **In field...** | **Do the following...** |
--- | ---
Value | Type the value of the score (or proficiency level).  
*E.g.: 1 for bad, 2 for intermediate or 3 for good.*
Text | Type a name for the score (or proficiency level).  
*E.g.: bad, intermediate or good.*

8. In the **Action** column, click on the **Save** link.
9. Repeat steps **6** through **8** for all scores you wish to add to the scale involved.

**Working with Competency Profiles**

**Creating Artefacts**

An artefact is a common name for anything or anyone that/who has a link with the outside world and to which/whom a competency profile can be assigned. This can be a natural person, a role, a didactical model, a function, a role function, a business process, a task or a learning resource. Just as it is possible with contextualized competencies, it is possible to nest artefacts into tree structures or network structures of artefacts in order to indicate relationships. Artefacts can have one or more attributes, such as distance from work, cost, effectiveness, maximum time span, etc, all characteristics further fine-graining the artefact.

**To create an Individual**

1. In the menu, click **Artefacts**.
2. Click the *Add new* link.
   The following screen will appear:

   ![Image of Artefact screen]

3. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type the name of the individual.</td>
</tr>
<tr>
<td>Type</td>
<td>Select the artefact type called <em>Individual</em>.</td>
</tr>
<tr>
<td>Description</td>
<td>Type the description of the individual.</td>
</tr>
<tr>
<td>External ID</td>
<td>Enter an external ID code for the individual. This is a manually entered unique identifying code.</td>
</tr>
<tr>
<td>First name</td>
<td>Type the first name of the individual.</td>
</tr>
<tr>
<td>Last name</td>
<td>Type the family name of the individual.</td>
</tr>
<tr>
<td>Phone number</td>
<td>If appropriate, type the phone number of the individual.</td>
</tr>
<tr>
<td>Department</td>
<td>If appropriate, type the name of the department the person is working.</td>
</tr>
</tbody>
</table>

4. Click the *Save* button.

*To create any other Artefact than an Individual*

1. In the menu, click *Artefacts*.
2. Click *Add new*.
3. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type the name of the artefact.</td>
</tr>
</tbody>
</table>
Type | Select the artefact type. This can be a didactical model, a function, a role, a role-function, a business process, or a learning resource.

Description | Type the description of the artefact.

External ID | Enter an external ID code for the artefact. This is a manually entered unique identifying code.

4. Click the Save button.

**To assign Attributes to Artefacts**

1. In the menu, click Artefacts.
2. Look up the artefact of your choice.
3. In the Actions column of the artefact of your choice, click the Attributes link.
4. At the bottom of the screen, click the Add new link.
5. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Type the name of the attribute of the artefact. E.g.: Distance Home-Work (in case of an individual)</td>
</tr>
<tr>
<td>Description</td>
<td>Type the full name of the attribute of the artefact. E.g.: Distance from home to work</td>
</tr>
<tr>
<td>Data type</td>
<td>Type the data type of the artefact. E.g.: km (for kilometers)</td>
</tr>
<tr>
<td>Value</td>
<td>Type the value. E.g.: 50</td>
</tr>
</tbody>
</table>

6. Click the Search link in order to look up the child contextualized competency.
7. Look up the contextualized competency of your choice.
8. In the Actions column of the contextualized competency of your choice, click the Select link.
9. Click the Save button.

**To nest Artefacts**

1. In the menu, click Artefacts.
2. Look up the artefact of your choice.
3. In the Actions column of the artefact of your choice, click the Update link.

The following screen will appear:
4. At the bottom of the screen, click the **Link child artefact** link.
5. Look up the artefact that is a child of the current artefact.
6. In the **Actions** column of the artefact of your choice, click the **Select** link.
7. Repeat steps 3 through 5 for all the artefacts you want to assign as children to the current artefact.
8. Click the **Save** button.

### Creating Competency Profiles

A competency profile consists of an aggregation of contextualized competencies for one or more artefacts. These contextualized competencies may be interlinked and have rules applied to them. For more information, refer to **Contextualizing Competencies** on page 16.

Competency profiles serve several purposes. That is why there are different types of competency profiles: acquired, required or desired.

- **Acquired:**
  - for a **learning object**, the competencies of the profile are the competencies that will be won when you succeed for the learning object
  - for an **individual**, the competencies of the profile are the competencies the individual has already acquired by passing tests in learning objects

- **Required:**
  - for a **learning object**, the competencies of the profile are the competencies the learner has to dispose of before he/she can start the learning objects
  - for a **role**, the competencies of the profile are the competencies the role has to dispose of in order to match it to the profile of an individual
- **Desired:**
  - for an **individual**, the competencies of the competency profile involved are a target

A competency profile can be linked to more than one artefact. For instance, in order to be enrolled in the first year of civil engineering studies at university, all courses require the same prior knowledge. They can all be assigned the same *required* competency profile.

**To create a Competency Profile**

1. In the menu, click **Profiles**.
2. Click the **Add new** link.

The following screen will appear:

3. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Context</strong></td>
<td>Select the context of your choice.</td>
</tr>
<tr>
<td><strong>Artefact</strong></td>
<td>Select the artefact(s) for which the profile is set up. This can be a person, a role, a function, a business profile, a task, etc. In order to do so, click an artefact in the <strong>Available</strong> column, and click the → arrow to move it to the <strong>Selected</strong> column.</td>
</tr>
<tr>
<td><strong>Label</strong></td>
<td>Type a name for the competency profile.</td>
</tr>
</tbody>
</table>
| **Type** | Select the type of the competency profile:  
  - Acquired: the competencies of the competency profile will be won (for learning objects) or have been won (for individuals)  
  - Required: the competencies of the competency profile are a condition for starting the learning object for the |
In field... | Do the following...
---|---
learner; also a role has required competencies
- Desired: the competencies of the competency profile involved are a target for the individual

| Description | Type the description of the competency profile. |
| Keywords | Type some keywords as metadata to the competency profile. |

4. Click the **Save** button.
5. Assign contextualized competencies to the profile.
   For more information, refer to *Assigning Contextualized Competencies to Competency Profiles* on page 24.

### Looking up Competency Profiles

For more information, refer to *Looking up data* on page 10.

### Assigning Contextualized Competencies to Competency Profiles

There needs to be a link between the competency profile and one or more contextualized competencies.

**To assign Contextualized Competencies to a Competency Profile**

1. In the menu, click **Profiles**.
2. Look up the competency profile of your choice.
3. In the **Actions** column of the competency profile of your choice, click the **Update** link.
4. At the bottom of the screen, click the **Add child** link.
5. Enter at least the mandatory fields:

<table>
<thead>
<tr>
<th>In field...</th>
<th>Do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role for children</strong></td>
<td>Select how the competency profile relates to its child contextualized competency. Is the first one a part of the second or the other way around?</td>
</tr>
<tr>
<td><strong>Weight scale</strong></td>
<td>Select the weight scale.</td>
</tr>
<tr>
<td><strong>Weight</strong></td>
<td>Select the weight.</td>
</tr>
<tr>
<td><strong>Rule for children</strong></td>
<td>Select if ALL or ANY of the other contextualized competencies assigned as children to the parent competency profile have to be taken into account.</td>
</tr>
</tbody>
</table>

6. Click the **Search** link in order to look up the child contextualized competency.
7. Look up the contextualized competency of your choice.
8. In the **Actions** column of the contextualized competency of your choice, click the **Select** link.
9. Click the **Save** button.
Fout! Opmaakprofiel niet gedefinieerd.
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