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1 Introduction

Lanteria HR is a human resource management system that provides the central storage for all HR information, supports HR processes, as well as competence framework and learning. This user’s guide describes the Competence section of the Performance module of Lanteria HR. For a full overview of the Performance module, it is recommended to also get acquainted with the Performance - Reviews and Performance - Goals user guides.

The target audience is HR specialists and managers who will be working on creating the competency framework, defining the competency requirements for the job roles and assessing the employees based on these requirements.

1.1 Competence Overview

The Competence section of the Performance module allows setting up your company competency framework and making it available for all the employees. You can also define the required competency levels for each job role and assess the employees based on these competencies.

1.2 Terminology List

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency Framework</td>
<td>Description of the competencies required from the company employees to effectively perform their job roles.</td>
</tr>
<tr>
<td>Competency Groups</td>
<td>A number of competencies grouped according to some common characteristics. Used for grouping the competencies in the Competency Framework.</td>
</tr>
<tr>
<td>Competency Areas</td>
<td>A number of competency groups united together based on the common characteristics. Used for grouping the competencies in the Competency Framework.</td>
</tr>
<tr>
<td>Competency Levels</td>
<td>The scales for measuring how strong the employee is in the current competency.</td>
</tr>
<tr>
<td>Job Profile</td>
<td>Description of the job requirements, responsibilities, competency requirements and KPIs (Key Performance Indicators) for the job role.</td>
</tr>
<tr>
<td>Qualification Rating</td>
<td>Predefined qualification grades the employees of specific job role can be divided into according to their competency level.</td>
</tr>
</tbody>
</table>
2 Competency Framework

It is essential to set up a relevant competency framework in the company and make sure that it is followed by the employees. In the Lanteria HR Competence section, you can set up the framework that will be available for all the employees and base the competencies employees will be assessed by on this framework.

To view the competency framework, click Performance > Competence > Competency Framework.

It consists of the competency areas (in this example Management, Soft Skills), competency groups (Leading Organization, People Management) and competencies (that become visible when you open a group). All these elements are fully customizable and are defined in the Competence Settings (Performance > Competence > Settings).
3  Competency Job Map

The Competency Job Map (Performance - Competence) shows all the job roles and all the competencies, and you can see how the competencies are assigned to the job roles. If you see any competences that are not assigned, but are relevant for the job role, click Include to assign them.
4 Competency Search

This section explains how to find an employee with the required competencies and how to obtain the analytical information on the employee competencies.

4.1 Competency Search

Use Competency Search to find an employee with specific competencies, certificates, education level or training. Click Performance > Competence > Competency Search.

Select the competencies you are looking for along with their levels, certificate type, education level and training, and then click Search to find the employees meeting the defined criteria. You can also specify the skills that the employee(s) must have. Expand the Skills section and select the skills before clicking Search.
5 Job Profiles

For each job role, the system stores the detailed job profile descriptions that are also a part of the framework and can be referred to by all the employees. To view the job profiles, click Performance > Competence > Job Profiles.

The page shows all the job roles grouped by categories with their descriptions. To view the detailed description of the job role, click View.
5.1 Job Profile Sections

The job profile data cannot be edited directly from the job profile, it is taken from the different parts of the system. The job profile code and description are specified when creating the job roles under Core HR > Jobs and Positions > Job Roles.

Information for the Competencies section is taken from the Job Role Competencies page (Performance > Competence > Settings > Job Role Competencies).

Information for the Job Requirements and Responsibilities sections is defined under Performance > Competence > Settings, in the Job Role Requirements and Job Responsibilities pages.

5.2 Job Profile Modification Approval

To create or modify a job profile and get approval for it, use the approval requests functionality. For the detailed information on the approval requests, please refer to the Core HR User Guide.

The Job Description is a built-in approval process in Lanteria HR. It is not recommended to change the setup of this process, except for the approval workflow, which you can customize according to your company policies.
The Job Profile creation or modification can be done in the following way:

1. First of all, launch the approval process. From the Employee role, click My Details > My Approval Requests.

2. Click Job Description to open the request creation window.

3. If you plan to create a new job role and job profile for it, select the New Job Request check box. In this case, a new job role will be created when the approval process is finalized.

4. If you are creating or modifying a job profile for an existing job role, select it in the Job Role field.
5. Use the **Job Purpose** field to specify the main purpose for the job role. The information will be displayed in the **Job Purpose** field of the Job Profile.

6. Click **Save** to create the approval request.

7. The next step is filling in the initial information for the Job Profile and sending it for approval. In **My Details > My Approval Requests** (Employee role) or **Core HR > Approval Requests** (HR role), locate the newly created request.

8. To start working on the Job Profile, click **View Form** next to your request.

9. Use the **Add** buttons to add the new records and **Edit** buttons to modify or delete the records. The records of the modified profile will be marked with different colors for the approvers to see what was changed. The legend is in the bottom of the form.

   - White - records that were not modified, but existed in the initial profile
   - Green - records that were added
   - Yellow - records that were modified
   - Red - deleted records

10. After you finish working on the form, click **Approve/Reject** on the top of the form to launch the approval process.
11. With Request Approval selected in the Action field, click Save. The request will be sent for approval. The approvers can view the form, modify and approve it under My Details > My Approval Requests, in the Requests Requiring My Approval part.

12. Click View Form to open the Job Profile form. Modify it as necessary and use the Approve/Reject button for comments and approval.

After all the responsible persons approve the job profile, the changes will be applied to the job profile and become available under Performance > Compensation > Job Profiles. If the New Job Request check box was selected when launching the approval process, a new job role will be created under Core HR > Jobs and Positions > Job Roles.
6 Reports

The reports on the employee competencies help you track the competency requirements and how the employees meet these requirements. The reports are located under Performance > Reports.

6.1 Competency Descriptions

This report shows full corporate set of competencies with their descriptions.

<table>
<thead>
<tr>
<th>Corporate Competency Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
</tr>
<tr>
<td>Customer Focus</td>
</tr>
<tr>
<td>Mission Driven</td>
</tr>
<tr>
<td>Change Management</td>
</tr>
<tr>
<td>People Management</td>
</tr>
</tbody>
</table>

6.2 Competency Statistics

This report shows statistic of using competencies in different job profiles.

<table>
<thead>
<tr>
<th>Competency Statistics by Job Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>The report shows which competencies most frequently used in job profiles and hence are most important for effective company performance. You should pay special attention to these competencies.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Competency</th>
<th>Number of Job Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptability</td>
<td></td>
</tr>
<tr>
<td>Analytical Thinking</td>
<td></td>
</tr>
<tr>
<td>Asset and Liability Mgmt</td>
<td></td>
</tr>
<tr>
<td>CFO/Controller</td>
<td></td>
</tr>
<tr>
<td>Change Management</td>
<td></td>
</tr>
<tr>
<td>Coaching</td>
<td></td>
</tr>
</tbody>
</table>

6.3 Competency Assessment Analysis

The Competency Assessment Analysis report shows the statistics for the current competency levels for organizational units, employees or competencies.

1. Go to the Performance section and click Reports > Competency Assessment Analysis.
2. If you want to view statistics for a specific organizational unit, job role or competency group, select it in the filter.

3. Specify the view mode - the report can display the average competency score for employees, organizational units or competencies.

4. Click Generate.

6.4 Employee Competency Report

The Employee Competency Report shows the competency statistics per employee. Click Performance > Reports > Employee Competency Report to view the employee summary information.
For each employee, the report shows the following information:

- **Total Competencies** - the total number of competencies assigned to the employee, including the competencies required for the employee job role and competencies assigned to the employee personally
- **Average Score (Total)** - average score for all the employee competencies
- **By Job Profile** - the number of competencies that are required for the employee job role
- **Average Score (By Job Profile)** - the average score for the competencies required for the employee job role
- **Optional** - the number of optional competencies or competencies assigned to the employee on the individual basis
- **Qualification Rating** - qualification rating the employee belongs to
- **Last Assessed** - the date when the employee was last assessed
- **Details** - click View to see the detailed competencies/assessment of an individual employee
### 6.5 Qualification Ratings Report

To get an overview of the employees belonging to various grades, run the report. Go to Performance > Reports > Qualification Rating Report and click View.

#### Qualification Ratings

<table>
<thead>
<tr>
<th>Grade III (%)</th>
<th>Employee</th>
<th>Job Role</th>
<th>Organ</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Greg Sinner</td>
<td>Technician</td>
<td>Parts Manufacturing Australia</td>
<td></td>
</tr>
<tr>
<td></td>
<td>John Doe</td>
<td>Technician</td>
<td>Production</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Leonard Brown</td>
<td>Technician</td>
<td>Production</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Victoria Wack</td>
<td>Technician</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grade II (%)</th>
<th>Employee</th>
<th>Job Role</th>
<th>Organ</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>David Thomas</td>
<td>Senior Technician</td>
<td>Parts Manufacturing Australia</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Michael Canal</td>
<td>Senior Technician</td>
<td>Parts Manufacturing Australia</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Michael Matthews</td>
<td>Senior Technician</td>
<td>Production</td>
<td></td>
</tr>
</tbody>
</table>

Use the filter section to view the grades of specific job role, organizational unit, location, country or division.
7  Competency Settings

For each job role, there are competencies that are important for the employee to effectively perform the role. In Lanteria HR, you can define which competencies are required for the job role, at which level and how important they are for the role.

7.1  Competency Areas

First of all, create the competency groups, which are the most general elements of the competency framework:

1. In the Performance module, click Competence > Settings and then Competency Areas.

2. To add an area, click new item and specify the area title and description that will display in the competency framework.

7.2  Competency Groups

The competency groups comprise the competency areas. To create a group, follow these steps:

1. Go to Performance > Competence and click Settings > Competency Groups.

2. Click new item.
3. Type the title and description for the competency group.
4. Select the competency area the group belongs to.
5. Specify the competency group weight, which means how important the competencies from this group will be. The competency group weight will be automatically assigned to this group’s competencies and taken into account during the competencies’ assessment.

The created groups and their descriptions will display in the competency framework under the areas they belong to.
Please note that to enable the possibility to consider the competency group weight for competency score calculation, you should set the **Weighted Groups** setting to yes (Settings > General Settings > Competency tab).

### 7.3 Competencies

Each competency group contains a number of competencies. To set up the competencies, do the following:

1. In the Competence section of the Performance module, click **Settings > Competencies**.

2. To add a competency, click **new item**.
3. Type the title and description for the competency.

4. Specify the main competency elements provide the elements description, that is, how the employee possessing the current competency should act.

5. In the Interview Questions field, provide the questions that can be asked during the job interview to define whether the employee possesses the current competency.

6. Specify the period of the competence assessment validity (how long the competency assessment is valid) in the Validity Months field.

7. Finally, select the competency group the competency belongs to and save the changes.

When you open a group in the competency framework, you’ll see all the group competencies with their descriptions.
7.4 Competency Levels

The competency levels are used for assessing how good the employee is in the current competency. These levels are used during the performance review, manager ongoing assessment and when interviewing the applicants.

### Competency Levels

The competency levels are used for assessing how good the employee is in the current competency. These levels are used during the performance review, manager ongoing assessment and when interviewing the applicants.

#### To set up the competency levels, follow these steps:

1. Under Performance > Competence, select Settings and click Competency Levels.
2. Add the levels by clicking new item.
3. For each competency level, specify the title that will be displayed during assessment and the score the level corresponds to.

When assessing the employee, the manager or HR person will see the competency level title, and the score will be used by the system when building the analytics and comparing the required level to the actual level.

### Competency Level Descriptions

For those participating in the assessment to have a clear vision of expected employees’ behavior for each competency level, provide detailed descriptions for each level of every job role competency:
1. **Click Performance > Competence > Settings and then Competency Level Descriptions.**

![Image of Competency Level Descriptions](image)

- **Field Code Changed**

2. **To add a description, click new item.**

![Image of Competency Level Descriptions - new item](image)

3. **Select the competency and its level that you plan to describe.**
4. **In the Description field, provide the competency level description.**
5. **Specify the job role this competency level description applies for.**

These descriptions will be available from the competency framework when you open a competency.
7.6 Competency Criteria

Each competency can be assessed on a more comprehensive basis than just selecting the competency level the employee corresponds to. For each competency, you can define the criteria based on which the competency should be assessed and the manager or HR person will assess each criterion. Then the system will sum up the criteria scores and calculate the average score for the competency.

To use the criteria-based assessment, set up the criteria for each competency and specify “CriteriaBased” under Settings > General Settings > Competency > Competency Assessment Method.

### General Settings

<table>
<thead>
<tr>
<th>General</th>
<th>Competency Assessment Method</th>
<th>Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance</td>
<td>Weighted Groups</td>
<td>no</td>
</tr>
<tr>
<td></td>
<td>Manual Group Assessment</td>
<td>no</td>
</tr>
<tr>
<td></td>
<td>Allow Manual Assessment Date</td>
<td>yes</td>
</tr>
</tbody>
</table>

If you set Competency Assessment Method to Manual, the competencies will be assessed by selecting a competency level for the whole competency.

If you set Competency Assessment Method to CommentsOnly, the competencies will be assessed by providing the comments for the competency.

If NoComments is set, the competencies will be assessed by scores only. There will be no option to provide comments for the competency assessment.

7.6.1 Competency Criteria Types

Before setting up the competency assessment criteria, define the criteria types:

1. In the Competence section of the Performance module, go to Settings and click Competency Criteria Types.
2. Click new item and provide the title of the criteria type.

When creating the criterion, you’ll specify which type it belongs to.

### 7.6.2 Competency Criteria

To set up the criteria for assessing the competencies, follow these steps:

1. Under Performance > Competence > Settings, click Competency Criteria.

2. Click new item to add a criterion.
### Competency Criteria - Demonstrates Analytical skills in daily ro...

3. In the **Title** field, provide the criterion title that will be visible during the assessment process.
4. Next, select the type criterion belongs to.
5. Use the **Description** field to provide the description.
6. In the **Competency** field, select the competency that will be assessed based on this criterion.
7. Under **Job Roles**, add the job roles for which the current criteria will apply. Alternatively, select the **Applied to All Job Roles** check box.

During the assessment process, you will be able to assess each competency criterion.
7.7 Job Role Competencies

To set up the competencies required for the job roles, follow these steps:

1. Go to the Competence section of the Performance module and under Settings, click Job Role Competencies.

2. For each job role, add the competencies that are relevant for it. To add a competency, click new item.
3. Provide the title for the record.
4. Select the job role to which the competency is to be assigned.
5. In the Competency field, select the competency that is relevant for the specified job position.
6. In the Required Level field, select at which level the competency is required for the job role.
7. Select the Exclude From Performance Review and Exclude From 360 Assessment check boxes if you do not want to assess this competency during the performance review or 360 Assessment review.
8. Use the Importance field to define how important is the selected competency for the job role. The employee performing the job role will be assessed by the competencies assigned to his or her job role. The assessment will be compared to the competency levels required for the job role.
8  Ongoing Employee Assessment

Managers can assess the employees based on the job role competency requirements. This can be done either on the ongoing basis or as a part of the performance review. Performance reviews are covered by the Appraisal and Reviews manual. To assess the employees on the ongoing basis, follow these steps:

1. In the Manager menu, go to My Team Performance > Competencies.

2. Select an employee to assess and click View.

3. The page shows the competences that are required for the employee job role. You can include additional competencies for a specific employee by clicking Add competency for assessment. The competency will be added as optional, without the required level.

4. To assess all the competencies, click Assess above all the competencies.
5. To assess an individual competency, click Assess next to this competency name.

6. To view the history of the competency development (assessment), click History next to the competency name.

7. After assessing the competencies, you can compare the required level to the assessed employee level. The competencies that are below limit will be formatted with red.

8. Click Gap Analysis Chart to view the chart showing the difference between the required and actual employee level.
Gap Analysis Chart

Competency Analysis

Employees: Christine Grey, Job Role: Recruiter

- Self-organization
- Microsoft Office software
- Conversational management

Job Role Requirements vs Employee Assessment
9 Skills and Attributes

Using Lanteria HR, you can track the personal skills and attributes of the employees and applicants. In the employee card and applicant card, click the Skills icon.

In the page that opens, you can assign and view the skills.

Using this function, you can search for the employees with specific skills when forming a team for a new project or for the applicants with the skills required for a vacancy.

The skills and attributes, as well as their categories, are set up by the system administrator. You can track whichever categories and skills are useful for your company for the employees and applicants.
9.1 Set up Skill and Attribute Categories

The skills and attributes are displayed by categories. To set up the categories, follow the steps below:

1. In the Performance section, under Competence, click Settings > Person Skill and Attribute Categories.

2. Click new item to create a new category.

3. In the page that opens, specify the category title and whether it is mandatory.

4. Save the changes.

9.2 Create Skills and Attributes

Follow these steps to set up the skills and attributes that will be tracked for the employees and applicants:

1. Under Performance > Competence, click Settings > Person Skills and Attributes.

2. Click new item.
3. Specify the skill or attribute title.
4. Select the category it belongs to.
5. Save the skill or attribute.

### 9.3 Assign Skills to Employee

When the skills and attributes are set up, they can be assigned to the employees and applicants. To define the employee skills:

1. From the employee search or employee database, open the employee card.
2. Click the Enhanced Details tab and the Skills.

![Person Skills and Attributes - New Item](image)

3. Click Edit to select the skills and attributes for the employee.
4. Select the check boxes for the skills the employee has and save the changes.
9.1 Assign Skills to Applicant

To assign the skills to an applicant, follow these steps:

1. Go to the Recruiting section and click Candidate Database.

![Candidate Database](image)

2. Select any view or find an applicant using the Search function.

3. Click the applicant name to open the applicant card.

![Candidates - Emily Johnson](image)

4. Click Skills to open the list of skills and attributes.

5. Click Edit.

6. Select the check boxes next to the applicant skills and attributes and click Save.

To find a suitable applicant for a vacancy, you can now search by skills and attributes. For more details, refer to the Recruiting user guide.

9.2 Employee Search

After the skills and attributes are assigned to the employees, use the Competency Search to find employees with specific skills.

1. Click Performance > Competence > Competency Search.

2. Expand the Skills.
3. Select the skills and attributes you are looking for and click Search.

4. The employees meeting the selected criteria will display.