

**IHRDC's Competency and Learning Management System**

The Competency Assessment and Development process provides an easy way to assess one's current capabilities against specific competencies. Once the assessment is complete, a learning plan addressing identified competency gaps can be generated offering suggested training and technical resources to help fill those gaps.

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**Learning Curriculum**

- another new curriculum group: 0 of 10 Completed
- Management Pathways Stage 1 Foundation: 0 of 5 Completed
- O&M Pathways: 0 of 6 Completed

**Athena Microlearning**

What would you like to learn today?

Oil & Gas Business, Upstream Technology, Operations & Maintenance

**Mandatory Training**

Corporate Roles: FKST DUE  
HSE Roles: FKST DUE  
Office Safety: 1+ YEAR

OVERALL STATUS: 23%

- First Due
- 3 Months
- 12 Months
- 1+ Year

**Competency Assessment**

**Production Manager**

Professional: 0 of 3 Completed	Senior Professional: 0 of 2 Completed	IT Manager: 0 of 6 Completed	Production Engineer: 0 of 39 Completed	IT Manager: 0 of 6 Completed	Manager: 0 of 8 Completed	Professional: 0 of 3 Completed
Senior Professional: 0 of 8 Completed						

**Competency Development Plan**

Project Management: 0 of 2 Completed	Leadership: 0 of 1 Completed	Internal Marketing: 0 of 1 Completed	Problem Solving: 0 of 4 Completed	Teamwork: Pending Approval	Communication: Pending Approval	Sales: Pending Approval
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**Elective Training**

Purposeful Presentations	Overview of Finance	Habitat of Hydrocarbons in Sedimentary Basins	Wastewater 1	Wastewater 2	Basic Principles of Chemistry 1	Aromatic Chemistry
Crude Oil Transportation and Storage	Drilling and Well Completions	Oilfield Development	Marketing and Trading of Crude Oil	Oilfield Safety	Geologic Cross-Sections	Subsurface Mapping
Prospect Generation	+ Select New Course					

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# Version 4.19

CMS Online

Quarterly Release Notes

December 2020

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# 4.19 Feature Updates – Quarterly Update

**Version 4.19 was released December 17, 2020. We developed the following new features:**

Feature	Description
<b>Restricted Administrator</b>	This new user permission type enables an assigned administrator to manage a limited population of users within a CMS Online instance
<b>User Account Expiration</b>	We added the option to associate an expiration date with a user account. Upon expiration, user account status will change to inactive when the user attempts to login, and the user will not be able to access their CMS Online instance
<b>Add Attachment to Learning Resources</b>	Adds flexibility in what content is displayed to learners. Files, such as checklists, PowerPoints, and other supporting materials, can be attached directly to a learning event and accessed by learners
<b>Training Request and Approval Enhancement and Workflow update</b>	Added sequential approval workflow to the feature released in 4.18. Supervisor approves first, followed by other approvers, and finally a Final Approver. Also added ability to delete a form
<b>Enhancements and bug fixes</b>	Including: <ul style="list-style-type: none"><li>• Reveal all informational fields in Learning Event detail</li><li>• Fix issue in Administrator “Select All” when creating user links</li><li>• Elective Learning course catalog Register button fixes</li><li>• Laptop display issue when viewing My Employees’ Assessment</li><li>• Fix Add to Favorites</li><li>• Fix Supervisor Assessment completion date on Assessor Assessment</li><li>• Fix target date disappearing in Competency Development Plan</li><li>• Fix unable to deselect Recommended Training in My Plan</li><li>• Save full history of course completion evidence in My Reports&gt;Evidence</li></ul>

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# RESTRICTED ADMINISTRATOR

# Restricted Administrator

We added a user permission type to our Restricted Users. Restricted Administrators can be assigned a subset of the user population to manage in user accounts and system settings.

The screenshot displays the 'User Accounts' management interface. At the top, there are tabs for 'Users List' and 'Users Bulk Upload'. Below this is a search bar and an 'Export to Excel' button. The main area is a table of users with columns for Profile, Employee Name, Job Title, Department, Supervisor, Status, Login As, and Last Login. A 'Company Settings' dialog box is open, showing options to manage system links. The dialog has tabs for 'Create User Links', 'Manage User Links', 'Create System Links', 'Manage System Links', and 'Manage System Lists'. The 'Manage System Links' tab is active, showing a 'Which System Object do you want to Manage Links for?' section with a dropdown menu. The dropdown is open, showing 'Learning Curriculum Roles' selected. Below this, there are radio buttons for 'Employee Types', 'Job Titles', 'Departments', and 'Teams', with 'Teams' selected. A 'ONE TO MANY' relationship is indicated between the selected object and the radio buttons. At the bottom, there are two 'Items Selected' fields, both showing '0', and a 'SUBMIT' button.

Profile	Employee Name	Job Title	Department	Supervisor	Status	Login As	Last Login
Test User		New & Updated CUs	Administration 2	sa first	Inactive	Login as Test	05-Nov-2020
Tamir Agour		HR Assistant - entry level	Unknown	Test User	Inactive	Login as Tamir	
Matthews Ross		Drilling Engineer	Unknown	Melaku Test	Active	Login as Matthews	23-Nov-2020
Susan Smith		Geologist	Legal	Melaku Test	Active	Login as Susan	03-Dec-2020
Thy Tran		HR Assistant - entry level	Engineering	Melaku Test	Active	Login as Thy	19-Aug-2016
Jack Notarangelo		IT Manager	Commercial 2	Ehab Shehata	Inactive	Login as Jack	26-Feb-2018
Leachim Knarf		Project and Facilities Engineer	Unknown	Melaku Test	Active	Login as Leachim	07-Dec-2020
Faith Olugboye		Unknown	Unknown		Inactive		13-Dec-2018
Lawrence Collins		Supply Chain Manager	Unknown	Ehab Shehata	Active	Login as Lawrence	23-Jul-2020
Mark Butterworth		Professional	Unknown	Melaku Test	Active	Login as Lawrence	23-Jul-2020
		IT Manager	Unknown	Melaku Test	Active	Login as Mark	25-Nov-2020

## Key Features include:

- New user permission type
- Administrator assigns specific populations or users Authorized Administrator can manage
- Can perform all Administrative functions for assigned population
- Can **Not** modify email alerts, consent forms, login screen

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# USER ACCOUNT EXPIRATION

# User Account Expiration

We added the option to associate an expiration date with a user account. Upon expiration, user account status will change to inactive when the user attempts to login, and the user will not be able to access the CMS Online instance.

**Leachim Knarf**  
Project and Facilities Engineer

General Information | Review User Assignments | Manage User Assignments | Delete User

GENERAL INFORMATION ✓ Save ✕ Close

First Name\*

Last Name\*

Login ID\*

Email\*

User's Company ID

Nationality

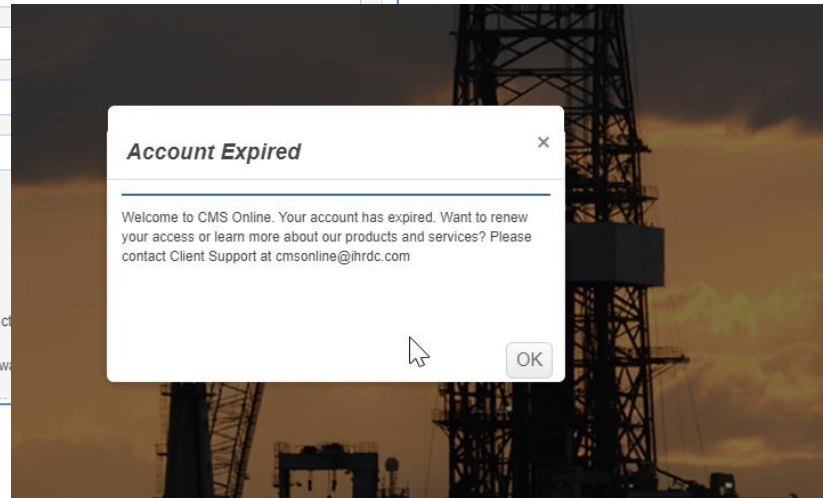
Current Country of Residence:

Hire Date

User Account Expiration Date

Active  active  inactive

Always Active/Inactive  Normal  Always Active



## Key Features include:

- Administrator populates User Account Expiration Date
- When user attempts login after account expiration, access will be denied
- User account status changes to Inactive when user has attempted to login after expiration

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# **ADD ATTACHMENT TO LEARNING RESOURCE**

# Add Attachment to Learning Resource

We added the ability to attach one or more files to a learning resource, to supplement the content.

The screenshot displays the 'Learning Event Detail' page for 'Delegation of Authority - Meaning, Importance and Principles'. The page includes fields for Title, Description, Learning Objectives, Content, URL, and Compliance Settings. The Attachments section shows three files: 'unnamed (1).gif', 'customhtmlwelcome.xlsx', and 'learning\_resources\_test.xlsx'. A modal window is open, showing the title, description, category, subcategory, type (Self-Study), duration (40), and course code (SS\_DOFA\_1) for the learning resource. The modal also displays the same three attachments.

## Key Features include:

- Content Developer can attach one or more supplemental file
- Learners can access attachments via the learning event detail



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# **TRAINING REQUEST AND APPROVAL ENHANCEMENTS**

# Training Request and Approval Enhancements

We added some enhancements to improve the function of the Training Request and Approval process we implemented in version 4.18

Training Request Form

1. Selected Course Information

Drag a column header and drop it here to group by that column

Info	Course Title	Course Type	No Emp
Global Marketing	e-Learning	2	

2. Training Event Details

Vendor: IHDC Location: Boston

3. Learning Objectives for Training Request

4. Cost and Budget

Cost: Budget Code:

5. Justification

6. Approvals

Requestor: Melaku Test 19-Nov-2020

Supervisor Approval: Tom Supervisor (super)

Approval notes

This form needs to be approved by additional people with the positions like Discipline Advisor, Department Manager, HR Manager, General Manager. Please select approvers from the list.

Additional Approvers

Professional	Name	Date
Unknown	Ha'icui Ayib	
Unknown	Ethan Aslan	
HR Assistant - entry level	Addis Amat	15-Oct-2020

Final Approver

Production Manager: Tim Dever

Selected Employee(s)

Thy Train Unknown Assignment type: Mandatory Training

Submit for Approval

Attachments

drag and drop your document here or [browse](#)

Save

## Key Features include:

- Improved user interface
- Ability to route approvals after supervisor approval
- Delete a request form

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# **NEW ADVANCED REPORTS & DASHBOARDS**

Released November 16, 2020

# Advanced Reports Released in November

**[4.18] User Logins - Most Recent**

> Filters

Show the most recent login for users, click on name to drill down to login history.

Date ^	Time (GMT+1) v	Duration (HH:MM)	No. of Logins past 90 days	Name v	Email	User Company ID
10/13/2020	07:01 PM	02:33	540	<a href="#">Melaku Test</a>	demsis@yahoo.com	2250898
10/13/2020	03:25 PM	00:43	83	<a href="#">Addis Amet</a>	melaku.demsis@gmail.com	
10/08/2020	03:48 PM	00:54	9	<a href="#">Ehab Shehata</a>	eshahata@ihrdc.com	
09/30/2020	03:41 PM	00:03	1	<a href="#">Reassess 5</a>	tbeigbeder@ihrdc.com	
09/09/2020	07:13 PM					
07/28/2020	01:53 PM					

**User Logins – Most Recent:**  
shows most recent login for all users

**[4.18] User History Login**

> Filters

Date Start ^	Time Start (GMT+1) ^	Duration (HH:MM)	Name	User Company ID	Email	Active
10/13/2020	07:01 PM		Melaku Test	2250898	demsis@yahoo.com	Y
10/13/2020	03:25 PM		Addis Amet		melaku.demsis@gmail...	Y
10/13/2020	03:23 PM		Addis Amet		melaku.demsis@gmail...	Y
10/13/2020	03:23 PM		Addis Amet		melaku.demsis@gmail...	Y
10/13/2020	01:23 PM		Addis Amet		melaku.demsis@gmail...	Y
10/13/2020	01:17 PM		Addis Amet		melaku.demsis@gmail...	Y
10/13/2020	01:13 PM		Addis Amet		melaku.demsis@gmail...	Y

**User History Login:**  
shows all logins for all users

# Advanced Reports, cont'd.

[4.18] Competency Assessment Matrix - by Competency Role

Preview Records 100

> Filters

Library	Sublibrary	Competency Unit	Status	Personal Score	Green	Yellow	Red	M.T. Elsharif			Brenda Magenna			Curtis Stone			Sonia Test			Rokh Mahood			Mehdiyeh Karamzad		
								JUL	SEP	FAR	JUL	SEP	FAR	JUL	SEP	FAR	JUL	SEP	FAR	JUL	SEP	FAR	JUL	SEP	FAR
1.Functional Core Compete	Business Acumen	Economic Analysis	Not Started	33	17	10	5	2	-1.00	1.00	3	0.00	3.00	3	-1.00	2.00	3	1.00	2.00	3	-2.00	1.00	3	-2.00	0.00
1.Functional Core Compete	Business Acumen	Internal Marketing	Not Started	23	7	11	5	3	-2.00	1.00	3	0.00	3.00	3	1.00	4.00	3	-2.75	0.25	2	1.00	1.00			
1.Functional Core Compete	Business Acumen	Project Management	Not Started	30	11	9	10	2	1.00	1.00	2	-0.50	1.44	3	1.00	3.00	2	0.44	2.44	2	-1.00	1.00	3	-2.00	0.27
1.Functional Core Compete	Business Acumen	Sales	Not Started	24	4	4	16	2	-1.00	1.00	3	-1.00	2.00	3	0.00	3.00	3	0.00	3.00	3	-2.00	1.00	4	-3.00	1.00
1.Functional Core Compete	Business Core Competence	Annual Work Program and Budget (WP&B)	Not Started	14	2	5	5	2	-1.00	1.00	3	-1.00	2.00	3	1.00	2.00	3	-2.00	1.00	3	-2.00	1.00	4	-3.00	0.00
1.Functional Core Compete	Business Core Competence	Budgeting and Budget Management	Not Started	1	0	0	1																		

**Competency Assessment Matrix – by Competency Role:** assessment results by competency role

Internal Verification Results

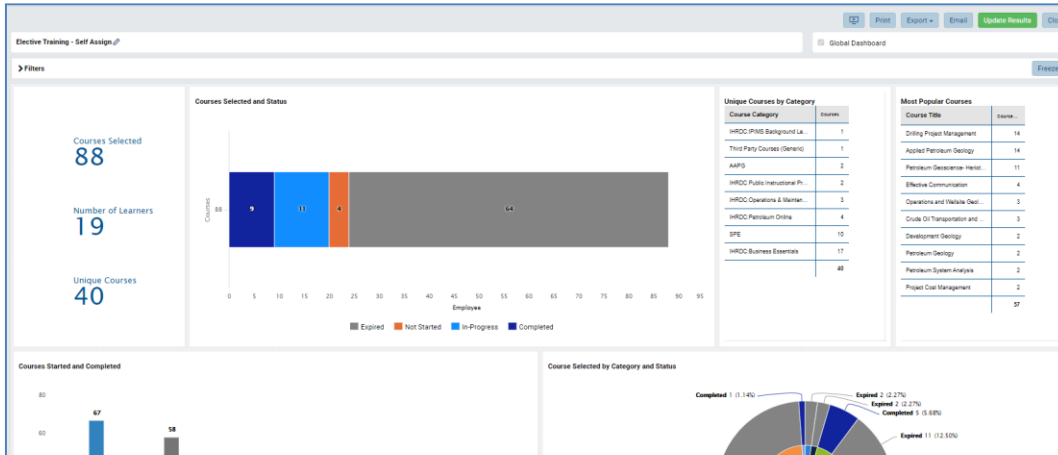
Preview Records All

> Filters

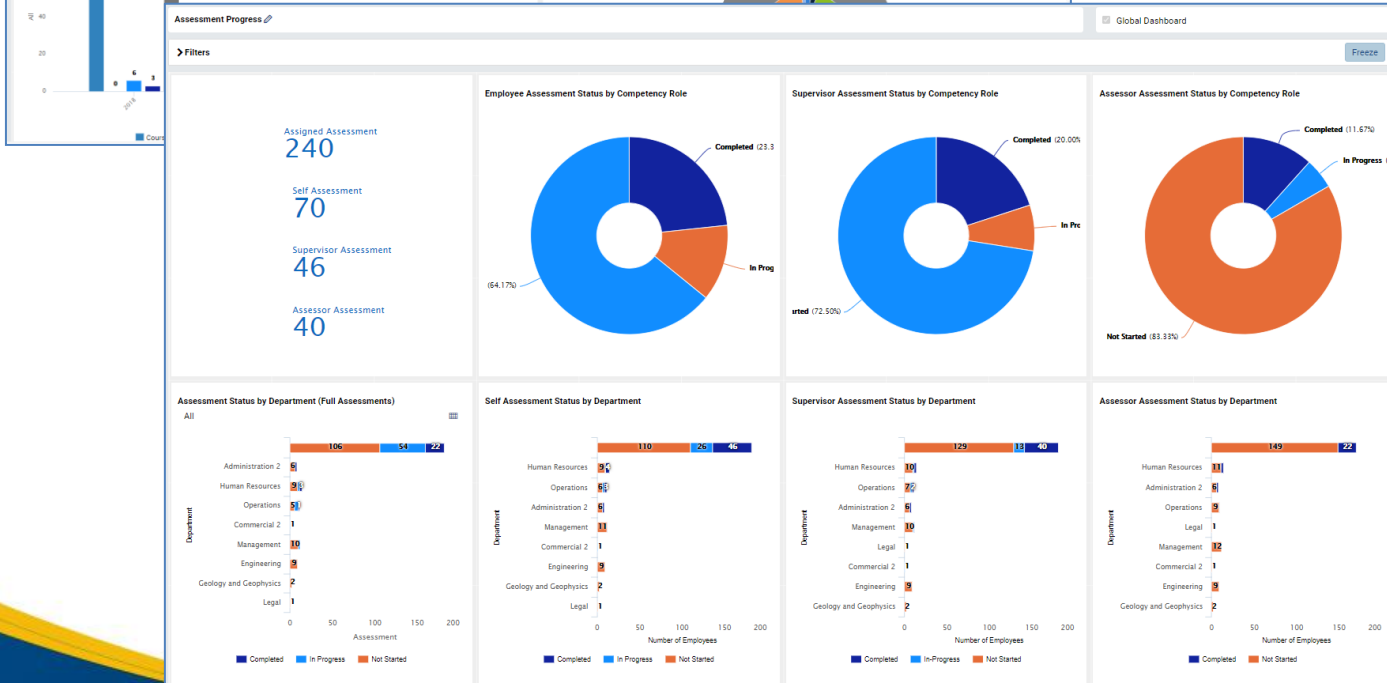
Last Modified	Internal Verifier Status	Internal Verifier Name	Internal Verifier Email	Internal Verifier Comments	Assessor Name	Employee Name	Job Title	Competency Role	Employee Assessment Status	Supervisor Assessment Status	Assessor Assessment Status
10/15/2019	Not Started	Jim Cash	brenda.magenna@com...		Cam Ho	Anne Cornell	Financial Analyst	Financial Analyst	Completed	Completed	Completed
10/15/2019	Pending Rework	Jim Cash	brenda.magenna@com...		Jim Cash	Electrical Cash	Electrical Technician 1	E1 - General Power Dis...	Completed	Completed	Completed
10/18/2019	Not Started	Nasir Khan	nkhan@com...		Rokh Test	Drilling Engineer - Demo	Drilling Engineer Techn...		In Progress	In Progress	In Progress
10/18/2019	Not Started	Nasir Khan	nkhan@com...		Nasir Khan	Rokh Operator	Refinery Operator	Refinery Processes - O...	Completed	Completed	Completed
10/18/2019	Not Started	Nasir Khan	nkhan@com...		Hugo Hidalgo	Sonia Test	Operations Manager	Company Values and P...	Completed	Completed	Completed
10/18/2019	Not Started	Nasir Khan	nkhan@com...		Sonia Test	Operations Manager	Operations Manager		In Progress	Not Started	Not Started
10/18/2019	Not Started	Nasir Khan	nkhan@com...		Brad Donohue	Sonia Test	Operations Manager	Senior Leadership Com...	Completed	Not Started	Not Started
12/24/2019	Not Started	Brad Donohue	bdonohue@hrdc.com		David Maloof	Environmental Officer	Environmental Officer		Completed	Completed	Not Started
12/24/2019	Not Started	Brad Donohue	bdonohue@hrdc.com		Curtis Stone	Nasir Khan	Operations Manager	Operations Manager	Completed	Completed	Completed
02/24/2020	Pending Rework	Jim Cash	brenda.magenna@com...	required comment	Jim Cash	Mechanical Cash	Mechanical Technician 1	G1 - Fundamentals Kno...	Completed	Completed	In Progress
03/11/2020	Not Started	Brad Donohue	bdonohue@hrdc.com		Wei Chan	Coal Estimation	Coal Estimation		Completed	Completed	Completed
03/11/2020	Not Started	Brad Donohue	bdonohue@hrdc.com		Sean O'Brien	Projects Engineer	Projects Engineer		Completed	Not Started	Not Started
03/11/2020	Not Started	Brad Donohue	bdonohue@hrdc.com		Curtis Stone	Bashir Mohammed	Planning Engineer	Planning Engineer	Completed	Completed	Completed
07/29/2020	Not Started	Adel Mohamed	amohamed@hrdc.com		Jim Cash	Maria Cruz	Planning Assistant Sr	Planning Assistant Sr	Not Started	In Progress	Not Started
07/29/2020	Not Started	Adel Mohamed	amohamed@hrdc.com		Jim Cash	Benjamin Damon	Planning Assistant	Planning Assistant	Completed	Not Started	Not Started
07/29/2020	Not Started	Brad Donohue	bdonohue@hrdc.com		Veronica Martinez	Nafis Jamil	HR Assistant	HR Assistant	Completed	Completed	Completed
10/30/2020	Pending Rework	Jim Cash	brenda.magenna@com...		Ehab Shehata	Veronica Martinez	HR Manager	HR Manager	Completed	In Progress	Not Started
10/30/2020	Completed	Jim Cash	brenda.magenna@com...	if comments will display where?	Jim Cash	Field Lead Operator	Field Lead Operator		In Progress	In Progress	In Progress
11/03/2020	Not Started	Adel Mohamed	amohamed@hrdc.com		Ehab Shehata	John Smith	Finance Manager	Finance Manager	Completed	In Progress	Not Started

**Internal Verification Results:** displays all competency roles selected for Internal Verification, current status and verifier comments

# Advanced Dashboards



**Elective Training:** contains key information about the status of elective training for the user population



**Assessment Progress:** displays assessment statuses for Employee, Supervisor and Assessor Assessments

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**COMING SOON**

# Next Release – 4.20 Feature Updates

CMS Online version 4.20 will be released in March 2021. New features will include:

Feature	Description
Competency Unit Criticality Rating	Allows a Content Developer to assign a criticality rating at the competency role level (for a competency unit) to override the default "pass" percentage for levels 1 & 2.
Reconfigure Batch Email Alerts	We are improving the usability and function of our batch email alerts, currently used for Mandatory Training notifications.
Modify How a Course Shows Complete	We are adding flexibility for Content Developers to choose how users can confirm completion of a learning event.
Add bcc to Custom Email template	Adding blind copy to the options available on the custom email template will enable Administrators to send emails without revealing recipients
Additional User Accounts Fields	Additional fields include middle name, salutation, work phone, mobile phone, personal email, address, city, state, postal code, country, linkedin ID, salesforce ID (consider using company ID = SF ID)
Enhance Workflow When User Launches a Course with Attachments	As an enhancement to our 4.19 feature that enables one or more attachment to a learning event, we will create a workflow to ensure the learner sees all relevant attachments when launching a learning event



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- Senior Professional: 5 of 5 Completed
- IT Manager: 1 of 6 Completed
- Production Engineer: 17 of 30 Completed
- IT Manager: 5 of 5 Completed
- Manager: 5 of 5 Completed
- Professional: 3 of 3 Completed
- Senior Professional: 5 of 5 Completed

**Competency Development Plan**

- Project Management: 2 of 2 Completed
- Leadership: 1 of 1 Completed
- Internal Marketing: 1 of 1 Completed
- Problem Solving: 2 of 4 Completed
- Teamwork: Pending Approval
- Communication: Pending Approval
- Sales: Pending Approval

**Elective Training**

- Purposeful Presentations
- Overview of Finance
- Habitat of Hydrocarbons in Sedimentary Basins
- Wastewater 1
- Wastewater 2
- Basic Principles of Chemistry 1
- Aromatic Chemistry
- Crude Oil Transportation and Storage
- Drilling and Well Completions
- Offfield Development
- Marketing and Trading of Crude Oil
- Offfield Safety
- Geologic Cross-Sections
- Subsurface Mapping
- Prospect Generation

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