Onboarding Guide

SKILLSDB

Welcome to SkillsDB

This document is a step-by-step guide to setup your skills competency program with SkillsDB.

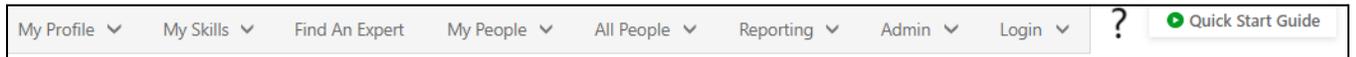Once the administrator login is received, you can begin the setup process.

If you need further guidance please visit our the Help Center on our website or contact support.

Index

First Time Login - Administrator

To set up your system, start with setup guide, available at the top of your landing page.

| My Profile ⌄ | My Skills ⌄ | Find An Expert | My People ⌄ | All People ⌄ | Reporting ⌄ | Admin ⌄ | Login ⌄ | ? | ▶ Quick Start Guide |

Setting up the Scoring System

First and foremost, you need to set up the scale on which the employees will be evaluated. SkillsDB allows for customized scale as per your needs. The scoring description needs to be set up initially because this is the backbone of creating the skills gaps. Only one scoring system can be set up in the system. Changing it in the future will create inconsistencies in your reporting and skill gap analysis.

Upon selecting the **setup guide**, a box will appear (shown below). Select **Set Up Your Scoring System** to modify the scoring scale per your requirements. For more details and help you can select **Learn More** and you'll be redirected to the help center on our website.
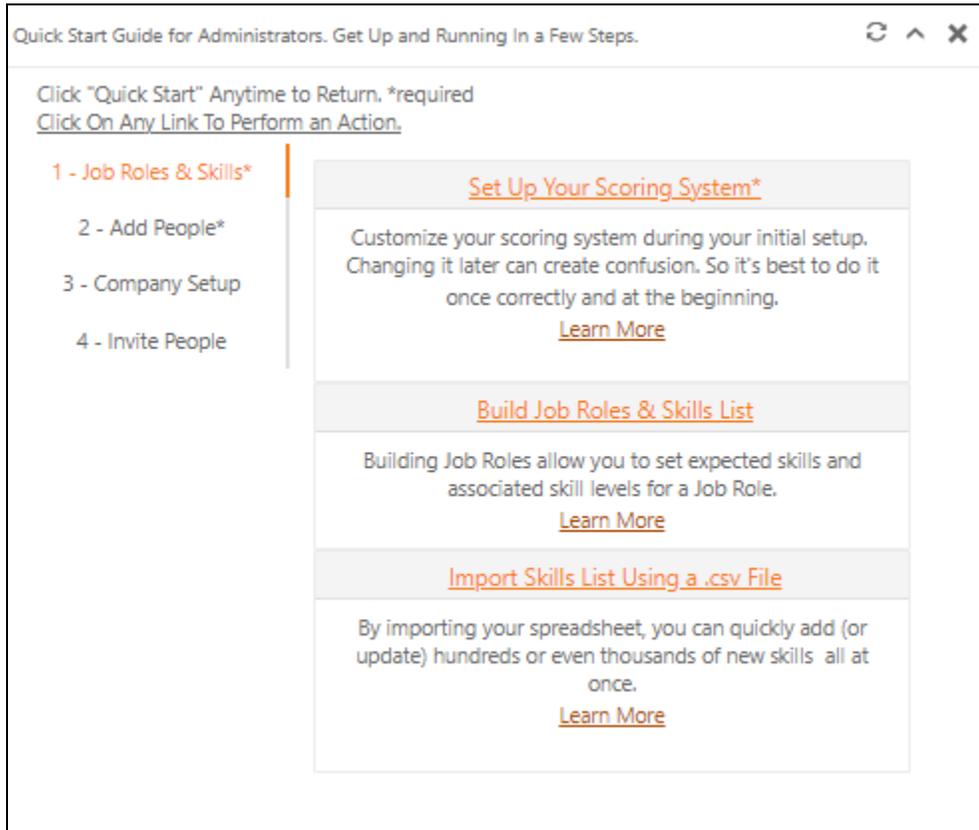
You can also reach here by going to **Admin** > **Skills Setup** > **Score Description**
You'll see the default score description ranging from 0-4.

| Score Description			
Add new Score	Score	Description	Detail Description
Edit Delete	0	Wants Training	0-Want Training. No knowledge or awareness. Nee...
Edit Delete	1	Basic	1-Basic. Applies the knowledge/skill in simple and ...
Edit Delete	2	Intermediate	2-Intermediate Generally applies the knowledge/s...
Edit Delete	3	Advanced	3-Advanced Consistently applies the knowledge/s...
Edit Delete	4	Expert	4-Expert. Top 10% in the world. Can mentor others...

Page 1 of 1 (5 items) ‹ 1 ›   Scores per page 10 ▼

▼ Create Filter

Edit Score Description

Select **Edit** to adjust the **score** (if you want the range from 1-3 instead of 0-4), the **Description** (if you want a different description for every score), and the **Detail Description** (if you want a different detailed description).

Add/Edit Score   ✕

Score:*   0

Description (50):*
Wants Training

Detail Description(255):
0-Want Training. No knowledge or awareness. Needs/wants training.

                                                          Update   Cancel

Add new Score

Select **Add new Score** to adjust for a larger range (say 0-5).

Add/Edit Score	✕
Score:* [_____]	
Description (50):*	
[_____]	
Detail Description(255):	
[ ]	
[ ]	
Update Cancel	

Delete Score

Select **Delete** to remove scores to have a smaller range (say 0-3).

Score Description			
Add new Score	Score ▼	Description ▼	Detail Description ▼
Edit Delete	0	Wants Training	0-Want Training. No knowledge or awareness. Nee...
Edit Delete	1	Basic	1-Basic. Applies the knowledge/skill in simple and ...
Edit Delete	2	Intermediate	2-Intermediate Generally applies the knowledge/s...
Edit Delete	3	Advanced	3-Advanced Consistently applies the knowledge/s...
Edit Delete	4	Expert	4-Expert. Top 10% in the world. Can mentor others...

Page 1 of 1 (5 items) ‹ 1 ›   Scores per page 10 ▼

▼ Create Filter

Build Job Roles & Skills List

Next is setting up your job roles and skills list. You must define and setup all job roles in your organization. Once the job roles are defined and setup, you'll need to assign skills to each job role. This is essential because employees are evaluated on individual skills. It is important to decide which skills need to be added, and what competency is required in each skill to fulfill a job role. This will give an idea of what 'good' looks like in that job role.

Select **Build Job Roles & Skills List** to build various job roles and their respective skills list as per your requirements. For more details and help you can select **Learn More** and you'll be redirected to our help center on our website.
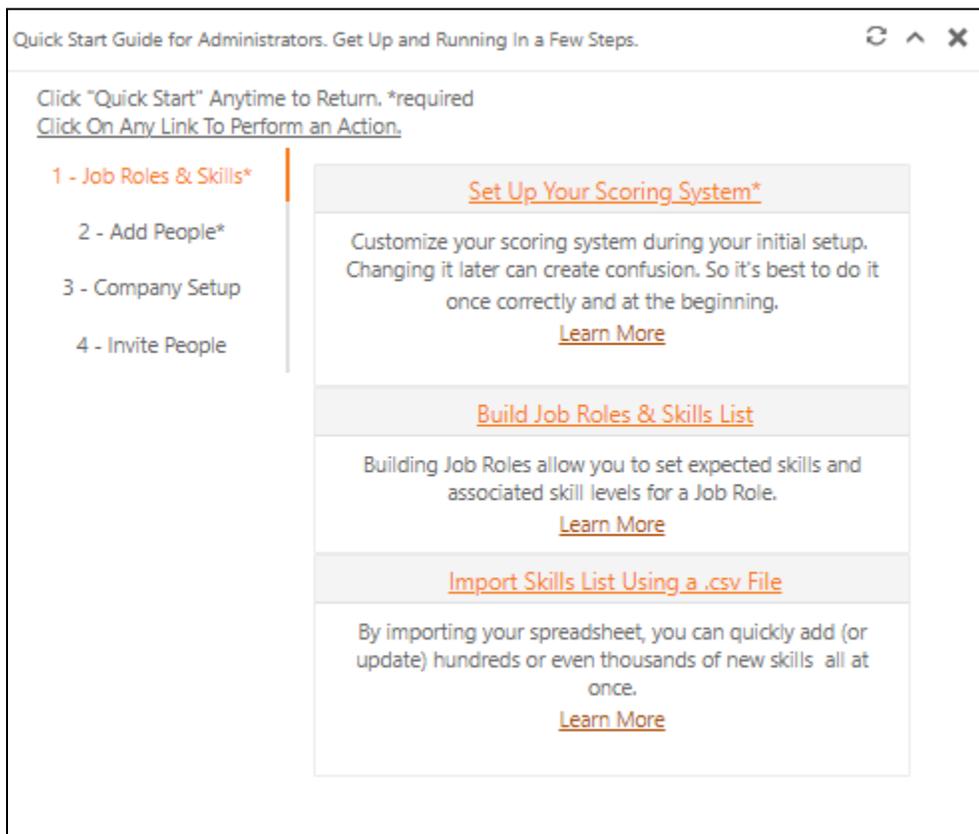
Adding Job Roles

You will be taken to the Job Role Builder with many thousands of predefined job roles, both hard and soft skills. Select your **Job Role Family** from the menu, then select the **Job Role**, then **Select/Add Job Role.**
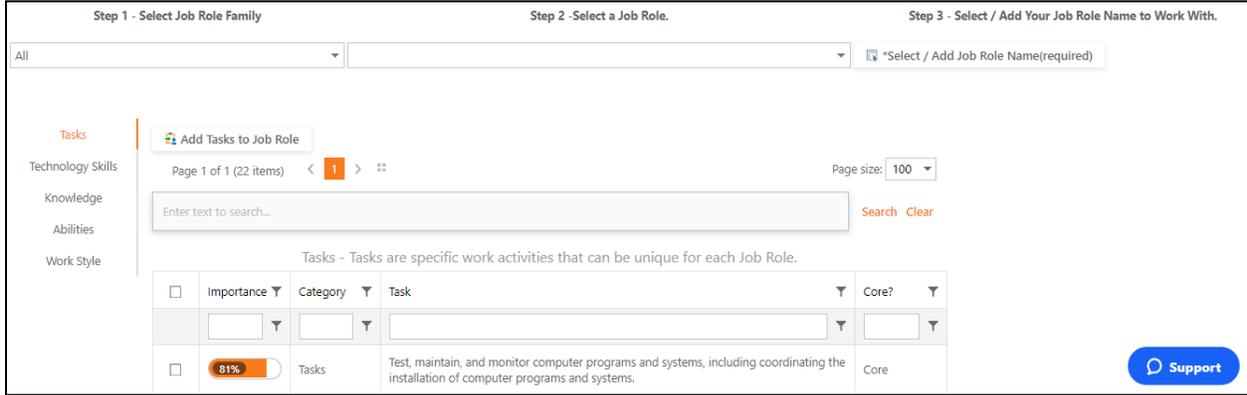
You can select from existing job roles available, as well as **Rename/Delete** per your needs.
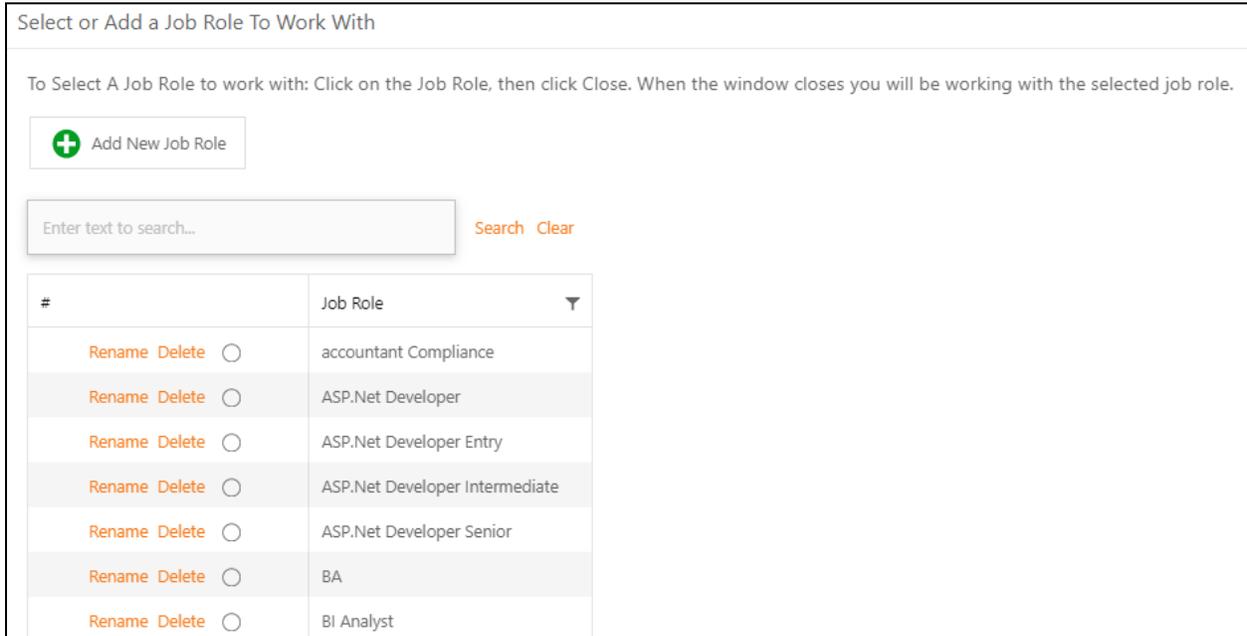
If you cannot find a job role as per your organization's structure, you can select **Add New Job Role** to create a new one.

Add Custom/Edit Existing Job Roles

If you need to add skills not already listed under a job role, you can go to **Add Custom/Edit Existing Job Roles**. You can also get here by selecting **Admin** > **Skills Setup** > **Build Job Roles**

You can select from the pre-loaded skills listed on the right by clicking on **Add Skills From Our Skills Library**. You can also get here by selecting **Admin** > **Skills Setup** > **Skills Library**. If you need to add a skill not listed or customize a skill as per your needs, select **Add/Edit Your Customer Skills**.
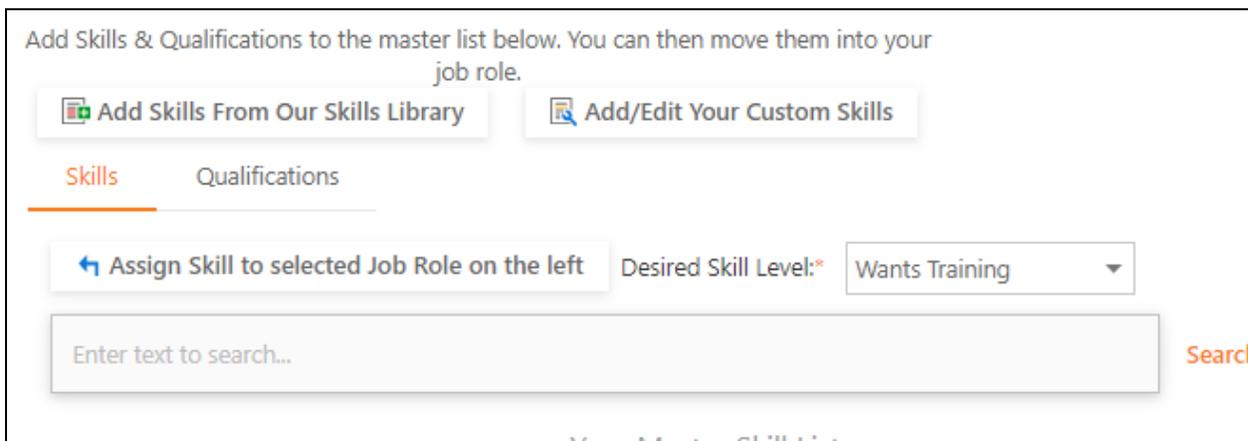
Once you have selected the skills, select the desired skill level and click on **Assign Skill to Selected Job Role** on the left. This will add those skills to the selected job role with the desired score for that particular skill in that role. You can get more details via a detailed video on custom building job roles here.

Adding Hard and Soft Skills

Once a job role has been selected, the system will get auto-populated with hard and soft skills to choose from. These skills have been categorized as **Tasks, Technology Skills, Knowledge, Abilities and Work Style**. Select various skills listed under all these heads and add them to the job role respectively by selecting **Add to Job Role**.

You can get more details via our detailed video on building Job roles [here].

Add Skills from our Skills Library

SkillsDB has a comprehensive skills library that covers a large field of work and professions. It is not automatically available because it is too vast, and any organization only needs small fraction of it. You'll need to move the skills into your instance or import skills from your own file first.

You can add skills to the master list by selecting the skills from the list and then selecting **Load Selected Skills Into My Skill List**. If you want to add qualifications, select **Qualifications/Education/Certifications** and select the ones you want and load them just like you loaded the skills.

Add/Edit Custom Skills

You have at your disposal a vast list of skills, but it becomes difficult to select all the skills from a single list. To make the skills more structured and defined, we have grouped them under various categories. You have the ability to classify skills under the main category and three subcategories.

In simple terms, the category name gives a basic idea of what all skills can be found under it. Finding all required skills for a job role thus becomes easier.

When you want to create/import your own skills library into your instance, it is vital to understand the relationship between categories and skills.

To create a new skill, select **Add New Skill** or **Add New Custom Skill.** You can also reach here by going to **Admin** > **Skills Setup** > **Skills List**

You can add a new category by selecting **Create New Categories & Edit/Delete.** Here you can edit/delete already existing categories as well as add a new category.

Select **Add New Category**

Adding Qualifications

Qualifications are specific certifications or courses cleared by an employee, which enhances their proficiency. Skills, on the other hand, are evaluated with on-the-job proficiency. Qualifications basically state that an individual with it has certain baseline proficiency. Some qualifications do need to be recertified from time to time but skills are evaluated/re-evaluated continuously.

You can similarly add/edit categories under the qualification category by selecting **Qualifications & Qualification Categories**.

Select **Add New Qualification** to add new qualification manually.

If you want to create a new category of qualifications, select **Create New Categories & Edit/Delete** to be taken to edit/delete existing categories, as well as create new ones.

Importing Skills

To make the process of importing easier, we have streamlined the whole process and brought it under **Import Center**. All import templates are accessible from this page. You can access it by going to **Admin** > **Import Center.**

Here you will have access to standard .CSV file template (Import Skills List Template) already formatted for import. Just follow the instructions via the instructions file (Import Skills List Specification) available alongside the template.

Once your template is ready, select **Launch Skills List Import**.

Select **Import Skills List** from the menu. Upload your template using the **Choose File** button and select **Import**.

For more information, go to the Help Center on our website for our detailed help importing skills.

Adding People

Once the scoring system has been set up, and the job roles and skills defined, you have created the foundations and basic layout of your system. Now, you can start importing people into the system.

Select **Add People** under the **Setup Guide** to begin the process of adding people.
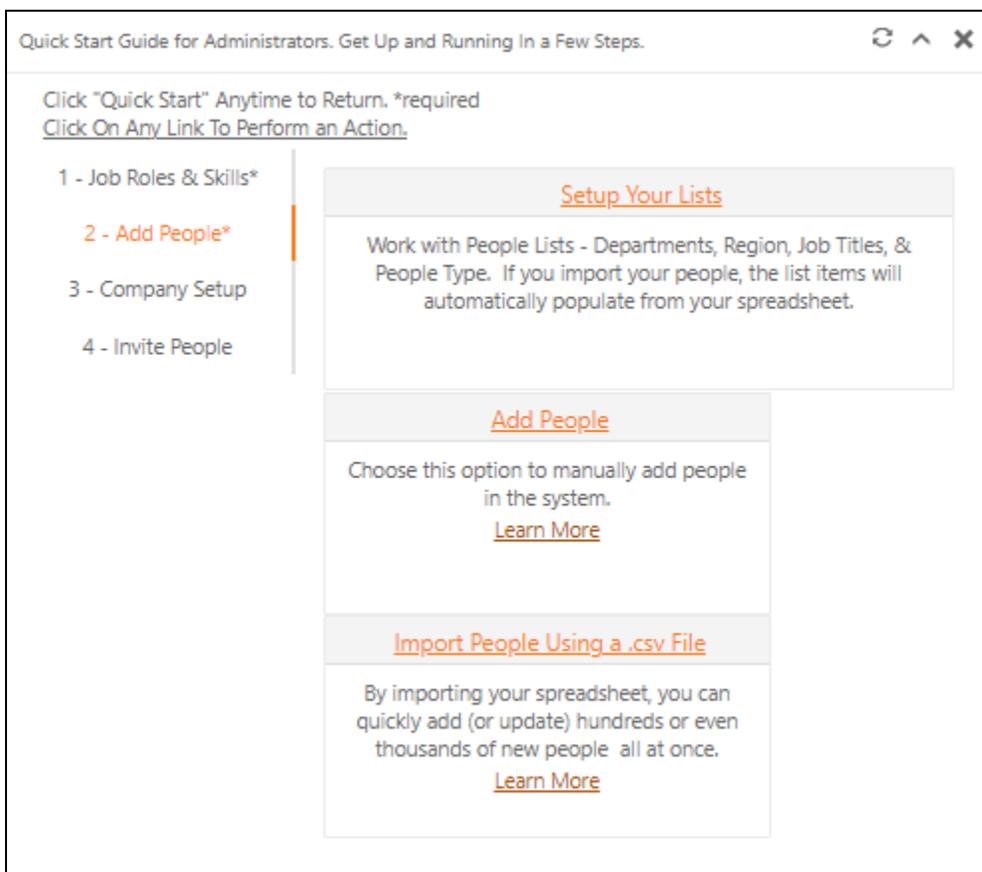
For more information, visit the dedicated Help Center on our website that covers all aspects of setting up people in your organization.

Setup Lists

Select **Setup Your Lists** to configure your organization here by creating **Business Regions, Departments, Job Titles and/or People Categories**. You can also get here by going to **Admin** > **People Setup** > **Lists**

Business Regions	Departments	Job Titles	People Categories

Csv | Excel | PDF

People Categories / Types - Add / Edit / Delete

Enter text to search...

New People Category	People Type Name
Edit Delete	Candidate
Edit Delete	Consultants
Edit Delete	Director
Edit Delete	Employees
Edit Delete	Endorser
Edit Delete	Executive
Edit Delete	Manager

Adding People Manually

Select **Add People**. For more details and help you can select **Learn More** and be redirected to the Help Center.
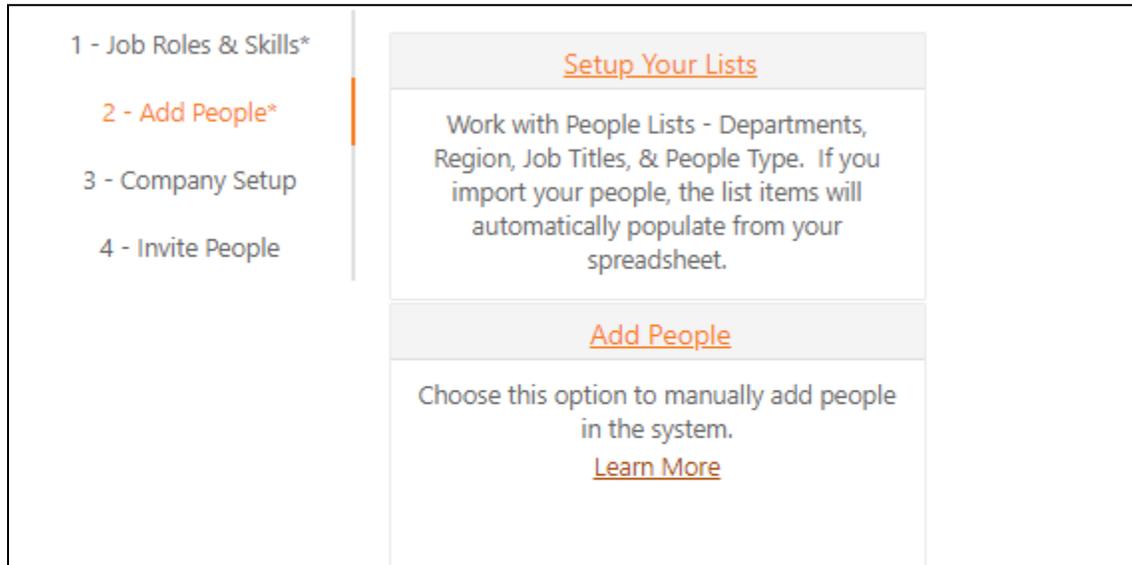
Select **Add People**, to be taken to the **People** page. You can also get here by going to **All People** > **Manage Personnel**.

You can also invite people via email to enter their details themselves. For more details on how to do this, please go to the Help Center on our website.

Select **Add New Person** to enter employee details yourself.

For more details and a video tutorial on how to manually add people, go to the Help Center on our website.

If you want to edit/correct any employee details, go to **All People** > **Manage Personnel**. You can see people already entered in the system. Select **Edit** to update personnel details.

						Last Name ↑ ▼	First Name ↑ ▼
Edit Delete	Skills	Files	Password	Learning	Pathways	Aaron	James
Edit Delete	Skills	Files	Password	Learning	Pathways	Arnison	Jan
Edit Delete	Skills	Files	Password	Learning	Pathways	Belanger	Jeffery

Importing People

You can bypass manually adding people by selecting **Import People Using a .csv File**.

You can also get here by going to **Admin** > **People Setup** > **Import Center**. For more details and help select **Learn More** and to be directed to the Help Center.

Here you will have access to our standard .csv file template (Import People Template) already formatted correctly. Follow the instructions file (Import People Specification) available alongside the template.

Once the template is ready, select **Launch People Import** to go to a new page. Select **People List** from the drop-down menu. Choose the file (be sure the file is still in **.csv format**) and select **import**. You can see the **export results** below the import link.

Go to the Help Center for detailed help on importing people.

Inviting People

People can be invited to enter their details individually by selecting **Invite People Using Mail Merge**. Remember to have your IT team whitelist SkillsDB IP addresses to avoid emails landing in employee spam folders. For more details and help you can select **Learn More** to be redirected to the Help Center.

Company Setup

This section will help customize for the broader, system-wide rollout. You can also set up email reminder frequencies for various tasks, as well as set restrictions on what employees/managers can edit in their profile and access.

Organization set up is in **Company Setup** > **Define Your Company Settings**. For more details and help select **Learn More** to be go to the Help Center.
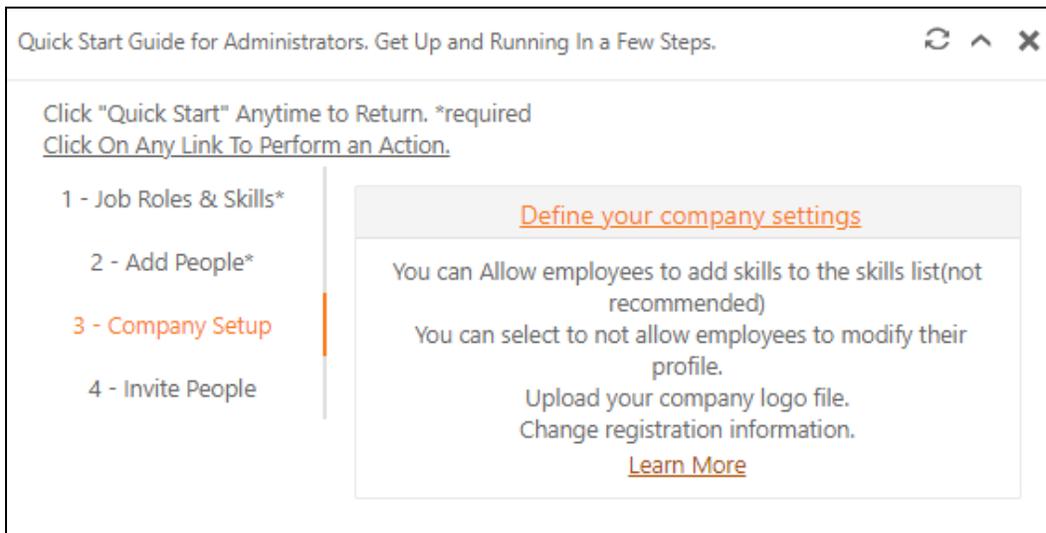
Go to **Company Setup** > **Edit Company Options** to update default. Remember to save your changes by selecting **Save Company Options**.

For better understanding, check out some of the videos in our Help Center.

Learning Plan System

Most skills and competency management systems work towards creating a framework for identifying skills needed for a particular job role and accurately registering the competency of individuals in those skills. SkillsDB does all this and more. Once the skills and competencies are identified, SkillsDB creates automatic learning plans to help bridge the skill gaps.

There are two options to choose your learning plan. One is manual learning plan assignment and the other is AI-based learning plan assignment. In the manual system, you have to match skills to particular learnings manually. Our AI version helps by being intuitive. With many courses embedded in our system, our AI is able to match and offer an extensive catalog of learnings related to particular skills, with minimal input from you.
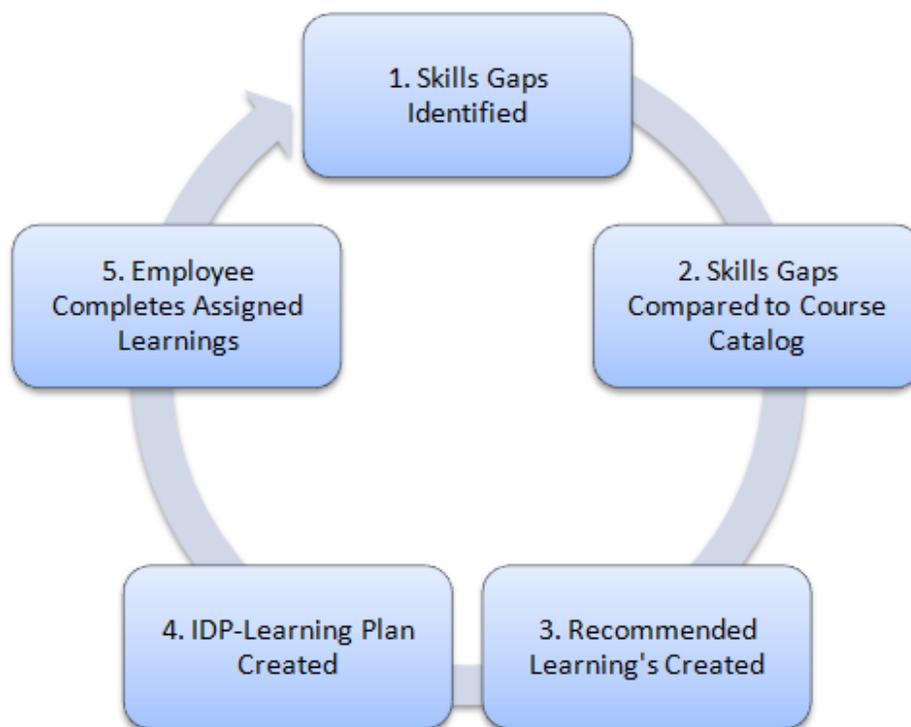
Let's look at the 5 steps process to increase the skill competencies of your employees. Please go to the Help Center for additional information.

1. Identify Skill Gaps

Once the employee has scored their assigned skills, their manager will review. The manager can score the employee higher/lower/same compared to the employee score on the skills listed in the job role. The employee does not see the manager's scores. Next, skill gaps are identified by comparing the manager score to the required skill score for any particular job role. Go to **Reporting** > **Skills** > **Skills & Competency** and select any of the gap analysis.

2. Skill Gaps Compared to Course Catalog

Once skill gaps have been identified, you can view the learnings available in the course catalog to bridge skill gaps. On the learning plan page of the employee, select **Show Learning Catalog** to see all available learnings.

You can add learning plans already available to your company by importing them into SkillSDB. Select **Admin** > **Learning Plan Setup** > **Import Courses.**

3. Recommended Learnings Created

Now that learnings have been shortlisted to bridge those skill gaps, you can create learning plans for individual employees. Shortlist the learning plan for the employee and select **Add to Learning Plan**.

You can also customize a learning plan/activity for individual employees. On the Learning plan page select **Add Custom Activity.**

4. IDP - Learning Plan Created

Individual Learning Plans (IDP) are created by going to **All People** > **Manage Personnel** > **Learning.**

							Last Name ↑ ▼	First Name ↑ ▼	Your ID ▼	Active ▼
Edit Delete	Skills	Files	Password	Learning	Pathways		Aaron	James	HR12345	☑
Edit Delete	Skills	Files	Password	Learning	Pathways		Arnison	Jan	23456	☑

You will go to the learnings page for that employee. You can get here by selecting **Recommended Learnings**.

My Recommended Learning

	Priority ↑ ▼	Job Role Gap ↑ ▼	Title ▼	Type ▼	Learning Level ▼	Expected Level ▼	My Score ▼
⊕ Add to Learning Plan	1	-3	Basics of MVC and the Moving Parts	Online	4	4	1
⊕ Add to Learning Plan	1	-1	Design a Data Warehouse with Azure SQL Data Warehouse	Online	3	3	2

Here you'll see all available learning plans. Select **Add to Learning Plan** and the course will be added to your learning plan. If an employee wants to add all the learning plans recommended, they can simply select **Add All Learnings Below to Your Learning Plan**. To see all learning plans assigned to an employee, simply select **Learning Plan**.
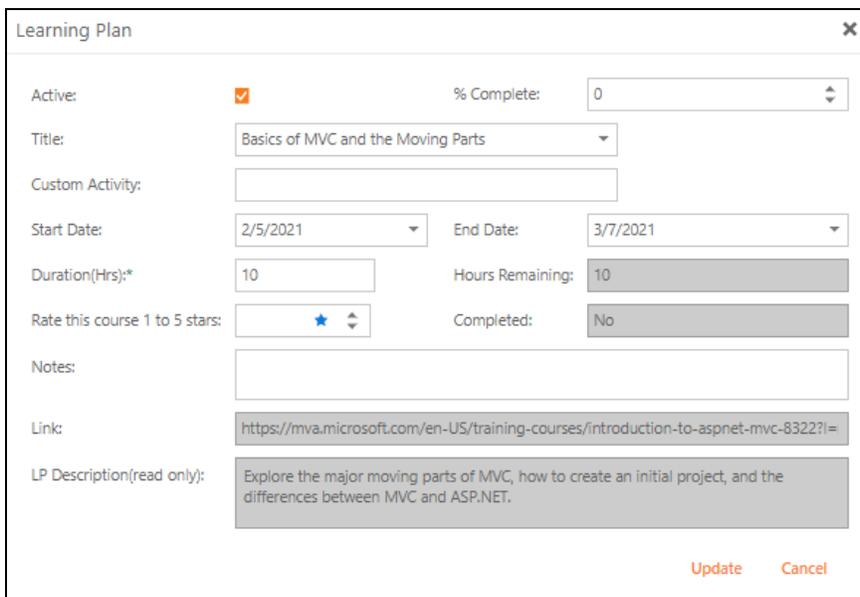
5. Employee Completes Assigned Learnings

Employees can see learning plans assigned to them by going to **Update My Learning Plan** on their landing page under **Guided Pathways**.
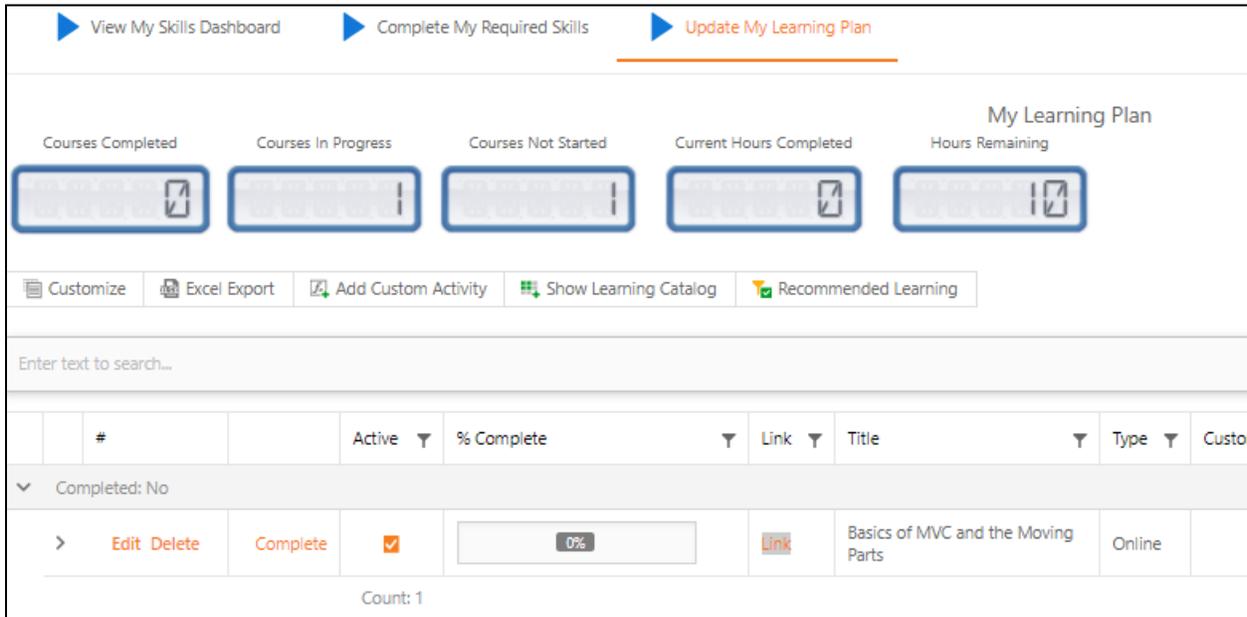
Once an employee starts a learning plan, they can select **Edit** to update the completion status of the learning plan (0-100%) under the **% Complete** menu.

Once the learning plan is completed, the skill proficiency is automatically updated to the new skill level and the learning will be archived.

| | | Skills Summary | | Skills | | Qualifications | | Recommended Learning | | Learning Plans | | Pathways | | Manager Dashboard |

Aaron   James   Ajames@skills.com   Employee Learning Plans

Courses Completed	Courses In Progress	Courses Not Started	Current Hours Completed	Hours Remaining
1	2	2	0	19

Customize | Excel Export | Add Custom Activity | Show Learning Catalog | Recommended Learning

Enter text to search...

	#		Active ▼	% Complete	▼	Link ▼	Title	▼	Type ▼	Custom Activity	▼	E
⌄	Completed: No											
>	Edit Delete		☑	0%		Link	Basics of MVC and the Moving Parts		Online	Shadowing Mr.X for a period of 2 weeks		2
>	Edit Delete		☑	0%		Link	Creating and Configuring Models		Online			3
	Count: 2											
⌄	Completed: Yes											
>	Edit Delete		☑	100%		Link	Basics of MVC and the Moving Parts		Online			2
	Count: 1											

Career Pathways

The career pathways section helps by guiding employees to choosing the right job role for their future growth. This section showcases the top five job roles an employee can explore with their existing skill competency. Once an employee chooses a future job role, they can take courses for skill development (i.e. learning plans to further their goals). Career Pathways helps by shortlisting the skills and assigning Learnings needed to be eligible for a particular role.