Skills Base

Administrators Quick Start Guide

Welcome to Skills Base!

This Quick Start Guide will help you setup Skills Base so you can begin your new approach to skills management fast. If you have any questions or need help setting up, you can contact a Skills Base team member using the email support@skills-base.com. We hope you enjoy your Skills Base experience!

Best wishes
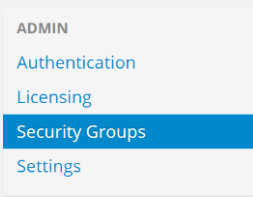The Skills Base team

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CONFIGURE SECURITY SETTINGS

Now that you've created your instance, it's time to get things ready for members of your organization to join. An important step you should consider before letting anyone else join your instance is how the security permissions are going to work for them. Skills Base lets administrators like you control what sort of information and functionality other members of your organization can access. This can be important for a variety of reasons:

- You may wish to hide the names and details of staff from one another
- You may want to control who is able to conduct supervisor assessments
- You may want to restrict who is able to run reports

Permissions in Skills Base are controlled by "Security Groups". People are assigned as members of a Security Group and as such inherit the permissions assigned to it. To modify permissions:

1. Begin by navigating to the Security Groups tab on the navigation menu within your instance.

2. Next, click on the "Edit" button next to the Security Group you wish to alter.

You will now be able to alter the security privileges of the Security Group you selected. We recommend taking your time as you configure each Security Group to make sure you're completely satisfied with the end result.

IMPORTING RECORDS (OPTIONAL)

To alleviate excessive manual and/or repetitive work when there are many records to add, Skills Base can assist by importing records into you instance in bulk. Interested organizations need only let an Skills Base team member know the type of record they'd like to import, and we'll provide the appropriate form to complete. When you're ready, send back the completed form and we'll handle the rest.

The following record types can be imported:

Record type	Notes
People (without login privileges)	Import details including: *First name, Surname, Role, Team, Location, Skill set, Security Group, and Email.* Only People without login privileges can be imported, as passwords cannot be imported. To bulk add people with login privileges to Skills Base, options include the "Add People By Invitation" feature, or integrate Single Sign On.
Roles	Import role *Names.*
Skills	Import details including: *Skill category, Skill name, Skill description.* Only flat category structures can be imported. Once the import is complete, skill categories can be re-arranged into a desired hierarchy.
Teams	Import details including: *Parent team name, Team name.* Only two levels of teams can be imported. Once the import is complete, team categories can be re-arranged into a desired hierarchy.

SETUP SKILLS

1. To add skills to your instance, navigate to the Skills Directory and click the "Add skills" button.
2. Select your skill's name and description. These details will be shown to supervisors and staff in your organization as they complete skill assessments. It's important therefore to be as clear and descriptive with skill names and descriptions as possible. When you've added all the skills you need, press cancel to return to the Skills Directory.
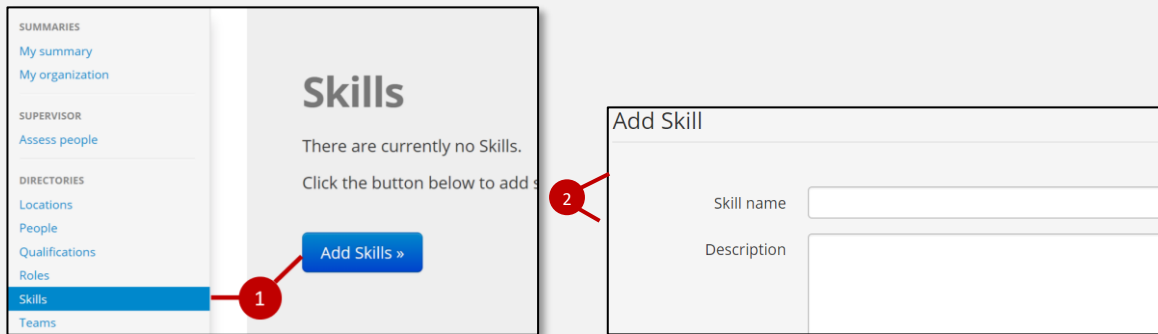
3. From the Skills Directory, you will now be able to create and organize skill categories, as well as add, edit, and delete skills. Skills and skill categories can be right-clicked for rapid management, as well as dragged and dropped into new categories using a mouse or laptop.

Note: Once you've created a few skills, you will be prompted to choose a skill category for any new skills you create. As mentioned, new skill categories can be added via the Skills Directory.

SETUP ROLES

Roles generally reflect position titles within your organization. Examples of roles could be "Project Manager" or "Accountant". You can use roles to track position titles, or to specify required skill sets for all people within a role.

1. To add a role to your instance, simply navigate to the Roles Directory and click the add a role button.
2. From here, enter a role name. Best practice is to assign skills to roles so it's recommended to do that during this step. Skills are assigned to roles on a category basis; simply click on the categories that apply to that role and you're good to go.

SETUP TARGET COMPETENCIES

The Competency Target feature lets organizations set an expected skill level for people within a Team or Role. Organizations can use this feature to track the progress teams, roles and people make towards achieving their target competencies.

1. To set a competency for a Team or Role, navigate to the role or team page then click on a role or team.
2. On the role or team page which opens, click the "Targets" button in the top right-hand side, then click the "Set targets now" button.

3. To set a target competency, simply select a desired skill level for the presented skills.
4. Skill levels and their labels can be changed by clicking the "Edit these labels" link.

Note: Skill levels and labels are universal throughout the organization, so changing them will affect all skill assessments.

SETUP LOCATIONS

Locations are another optional feature organizations can make use of in Skills Base. By creating locations and assigning them to users, organizations benefit from an additional way to slice and dice data and can track skills according to geography.

1. Select a location by dropping a pin on the part of the world map you're interested in.
2. Choose the location's name
3. Finally, click "Save location" to add it to your instance.
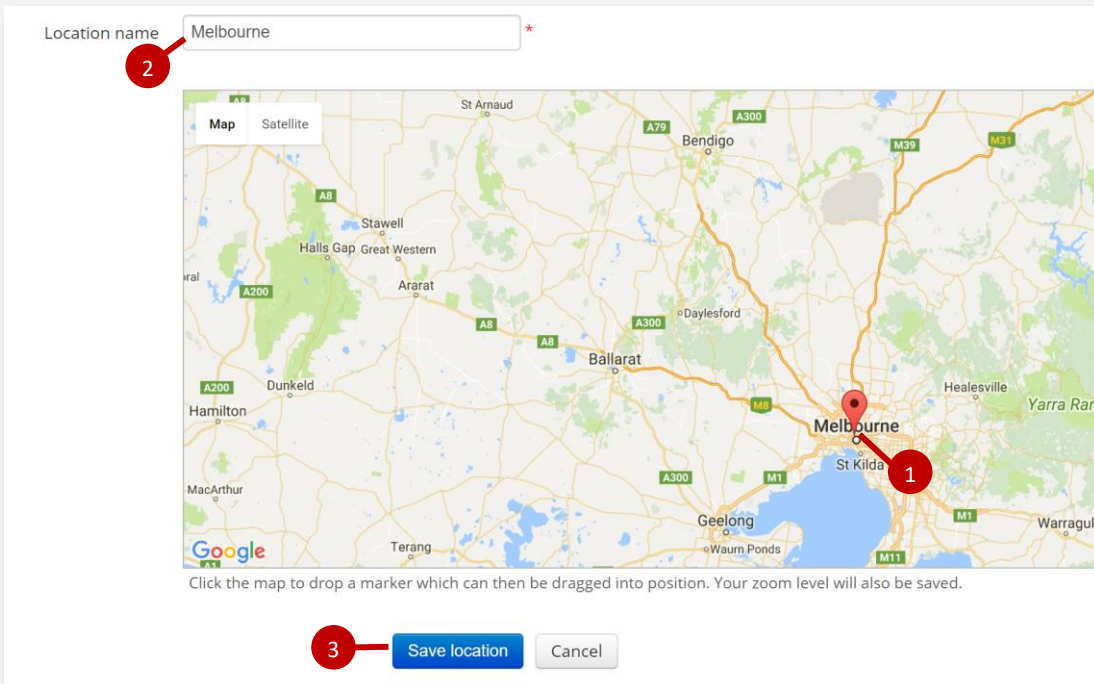
SETUP TEAMS

Creating teams is an optional but valuable feature of Skills Base. Teams allow organizations to:

- Control permissions based on team membership (this is especially useful in assigning supervisors)
- Logically group people according to an organizational structure
- Assign skill categories to all members of a team (via [[Skill sets]]). For example assigning "Sales" skills to the sales team and "Marketing" skills to the marketing team.

1. Add a team by navigating to the team page and clicking "New Team".
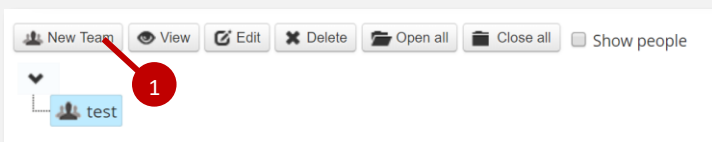
2. From here, select the following:
   Parent team: The team, if any, that the team you're now creating belongs to. For example, the "Junior Dev Team" may be a part of the larger "Dev Team"**.**
   Team name: The name of the team you're creating.
   Delegates: The people who have permission to view, edit, and/or assess people in this team.
   User selectable: Decide whether new users can join this team during their initial login.
   Skill categories: Select the skills you'd like assigned to this team.

CONFIGURE DEFAULTS

Skills Base lets organizations assign certain entities (Security Group, role, team, etc.) to be the default option. For example, these entities get assigned to new users when an inviter has not assigned specific entities to the user or the user is not given the option to select their own entities.

1. Access your default entities by navigating to the Settings page in your instance and then scrolling down to the "Default entities" section. From here you'll be able to select the default entities you think should apply.

CONFIGURE ASSESSMENTS

Supervisor and self-assessments in Skills Base rely on a universal set of skill and interest ratings which can be overridden on a per-category basis. Default ranges, labels, and descriptions as set but can be easily altered to suit an organization's specific needs. Altering assessment details is achieved with the following steps.

1. Navigate to the Settings page then scroll down to Assessment types. From here, select what sort of assessments you'd like to enable in Skill Base.

2. Scroll down to Interest level. Here you can decide how you'd like to manage interest assessments in Skills Base.

3. Continue scrolling down until you reach the Rating Scheme option. Click on the "Modify the Master Rating Scheme".

3. From here you'll be able to alter the range, labels, and descriptions of skill and interest assessments.

Skill ratings

	Label	Description	
0			☐ Enable zero rating
1	Very low		
2	Basic capability		
3	Competent		
4	Developed skills		
5	Highly skilled		

+ Add row   **✖ Remove row**

(2)

Interest ratings

	Label	Description	
0			☐ Enable zero rating
1	Very low		
2	Low interest		
3	Neutral		
4	Interested		
5	Highly interested		

+ Add row   **✖ Remove row**

If you would like to override the master rating scheme for a particular skill category:

- Head to the Skills Directory
- Right click on the desired Skill Category
- Select "Edit rating label overrides"