



GETTING STARTED AS A MANAGER

Organize, Optimize, and Utilize your People's Talents

This guide is designed to help you start using Skills DB Pro. You need to be logged in as a manager to follow the steps covered. Please contact your system administrator for your login details if you do not already have them.

The guide focuses on the manager specific functions in the system and does not cover setup of a manager's own skills. Please read the "Getting Started As An Employee" guide to find out how to manage your own skills.

Managers have a number of employees assigned to them, possibly corresponding to the employees in their department. The functions that will be discussed in the course of this guide can be performed by managers, only on those employees who are assigned to them. The only exception to this is the Expert Search feature; managers can search everyone in the system, including those not assigned to them.

Let's get started.....

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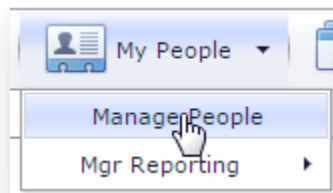
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VIEW EMPLOYEE DETAILS

A list of all employees assigned to a manager is displayed in the “My People” page. To view this page, go to **My People > Manage People**. This page provides a set of controls with which each assigned employee can be managed.



Search My People

Last Name First Name Department Business R

[Clear](#)

My People

Click on a button to work with your people.

					<u>Last Name</u>	<u>First Name</u>	<u>City</u>	<u>Business Region</u>	<u>Job T</u>
Edit	Skills	Qualifications	Trainings	Files	Adams	Joann	Camden	Englewood	Managi
Edit	Skills	Qualifications	Trainings	Files	Allen	Thomas	Mclean	Rochester	Integra
Edit	Skills	Qualifications	Trainings	Files	Anderson	Mary	Oxnard	Dayton	Applica
Edit	Skills	Qualifications	Trainings	Files	Andrews	Sophie	Jersey City	Dominican Republic	Busines
Edit	Skills	Qualifications	Trainings	Files	Angelo	Michael	Los Angeles	Dayton	Core S
Edit	Skills	Qualifications	Trainings	Files	Ballou	Saul	Chicago	Dayton	Contract
Edit	Skills	Qualifications	Trainings	Files	Banks	Hilda	Wichita	Dayton	Director
Edit	Skills	Qualifications	Trainings	Files	Basinger	Margaret	Dayton	Rochester	Project
Edit	Skills	Qualifications	Trainings	Files	Bass	Leslie	Rancho Cucamonga	Dayton	Remote
Edit	Skills	Qualifications	Trainings	Files	Belanger	Jeff	Lenexa	Englewood	Market
Edit	Skills	Qualifications	Trainings	Files	Black	Jeremy	Seattle	Rochester	Managi
Edit	Skills	Qualifications	Trainings	Files	Brady	Juan	Hampton	Englewood	BI Cons

If the list of people assigned to you is extensive, you can use the “Search My People” feature to find a particular employee. Otherwise, simply scan through the list. Click on **Edit** to edit employee’s profile, or click on **Files** to view documents uploaded by that employee.

VIEWING, ADDING, AND EDITING EMPLOYEE SKILLS

The system provides functions with which managers can assess and monitor the skills of employees. As a manager, you can view, update, and review skills for employees assigned to you.

HOW TO VIEW EMPLOYEE SKILLS

Go to **My People > Manage People**.

A list of all the employees assigned to you is displayed on the page, alongside menu options for working with them. Skim through this list for the person you want to work with and click **Skills**.



The screenshot shows a web interface titled "My People". Below the title is a blue button labeled "My People". Underneath is a grey bar with the text "Click on a button to work with your people." To the right of this bar are two columns of headers: "Last Name" and "First Name". Below these headers is a table of employee records. Each row in the table has five blue buttons: "Edit", "Skills", "Qualifications", "Trainings", and "Files". A mouse cursor is pointing at the "Skills" button for the employee named Mary Anderson.

Click on a button to work with your people.					Last Name	First Name	City
Edit	Skills	Qualifications	Trainings	Files	Adams	Joann	Ca
Edit	Skills	Qualifications	Trainings	Files	Allen	Thomas	Me
Edit	Skills	Qualifications	Trainings	Files	Anderson	Mary	Ox
Edit	Skills	Qualifications	Trainings	Files	Andrews	Sophie	Je
Edit	Skills	Qualifications	Trainings	Files	Angelo	Michael	Lo
Edit	Skills	Qualifications	Trainings	Files	Ballou	Saul	Ch
Edit	Skills	Qualifications	Trainings	Files	Banks	Hilda	W
Edit	Skills	Qualifications	Trainings	Files	Basinger	Margaret	Da
Edit	Skills	Qualifications	Trainings	Files	Bass	Leslie	Ra
Edit	Skills	Qualifications	Trainings	Files	Belanger	Jeff	Le
Edit	Skills	Qualifications	Trainings	Files	Black	Jeremy	Se

Clicking on **Skills** moves the system to the "Scores" page, where all the skills rated by both the employee and manager are displayed.

Scores						
Category ID	Skill	Edit Mgr Score	Manager Score	Self Score	Manager Update	Self Update
IT-Programmin	ASP.NET with SQL Server 8.0	Add/Edit Score	5	4	7/2/2013	11/15/2012
IT-Programmin	Data Modelling	Add/Edit Score	3	5	10/19/2013	11/15/2012
IT-Programmin	Dimdim	Add/Edit Score	4	2	10/19/2013	10/31/2012
IT-Programmin	Google Maps API	Add/Edit Score	3	2	10/19/2013	10/31/2012
IT-Programmin	Honeycomb	Add/Edit Score	4	1	10/19/2013	11/15/2012
IT-Programmin	Microsoft Access 2003	Add/Edit Score	2		10/31/2012	
IT-Programmin	Objective-C	Add/Edit Score	4	1	10/19/2013	10/31/2012
IT-Server	Email-Exchange	Add/Edit Score	1		10/31/2012	
SoftSkills	Management	Add/Edit Score	2	2	10/19/2013	10/31/2012

HOW TO ADD, EDIT, AND DELETE SKILL SCORES

To add your own score for a skill already rated by an employee, or to edit a score you had previously added, click on **Add/Edit Score** for the skill you want to score (see picture above.)

This causes the “Skill” dropdown list in the “Add/Edit Manager Skill Scores” section to be populated with the skill being scored.

Select the score, enter or adjust years of experience and notes if necessary, and click **Add Skill** (if you had not rated that skill before) or **Update Skill** (if you had previously rated the skill and only want to adjust it.)

If, on the other hand, you want to delete your score for that skill, simply click **Delete** instead.

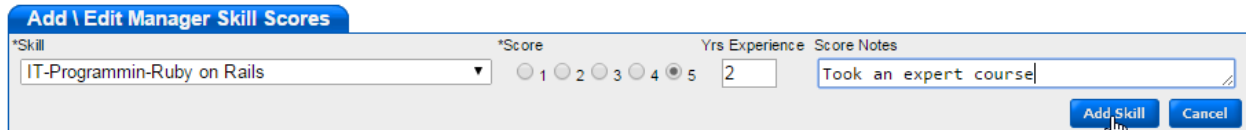
Note: The skills score system is single blind, which means employees cannot see the scores you entered for them until you print a report and show it to them.

HOW TO ADD A NEW SKILL FOR AN EMPLOYEE

So far, we have considered adding and editing manager ratings for skills that have already been rated. Often though, you may want to rate an employee on a new skill entirely.

To add a new skill, go to **My People > Manage People**, skim through the list for the employee you want to rate, and click **Skills**.

In the “Add/Edit Managers Skill Scores” section of the page, select the skill you want to score, choose a score, enter years of experience and notes if necessary, and click **Add Skill**.



The screenshot shows a web form titled "Add \ Edit Manager Skill Scores". It contains the following fields and controls:

- *Skill:** A dropdown menu with "IT-Programmin-Ruby on Rails" selected.
- *Score:** A radio button group with options 1, 2, 3, 4, and 5. The 5th option is selected.
- Yrs Experience:** A text input field containing the number "2".
- Score Notes:** A text area containing the text "Took an expert course".
- Buttons:** "Add Skill" and "Cancel" buttons are located at the bottom right of the form.

VIEWING, ADDING, AND EDITING QUALIFICATIONS

A qualification is an entry that is either true or false. For example, the statement “The Employee is certified in Oracle Database Management” can either be true or false. Certificates, educational degrees, and all other entries that can only have a true or false answer are stored as qualifications.

HOW TO VIEW QUALIFICATIONS

To check if an employee has a qualification, go to **My People > Manage People**, skim through the list of people to find the person you want to work with, and click **Qualifications**.

My People					Last Name	First Nam
Click on a button to work with your people.						
Edit	Skills	Qualifications	Trainings	Files	Adams	Joann
Edit	Skills	Qualifications	Trainings	Files	Allen	Thomas
Edit	Skills	Qualifications	Trainings	Files	Anderson	Mary
Edit	Skills	Qualifications	Trainings	Files	Andrews	Sophie
Edit	Skills	Qualifications	Trainings	Files	Angelo	Michael
Edit	Skills	Qualifications	Trainings	Files	Ballou	Saul
Edit	Skills	Qualifications	Trainings	Files	Banks	Hilda
Edit	Skills	Qualifications	Trainings	Files	Basinger	Margaret
Edit	Skills	Qualifications	Trainings	Files	Bass	Leslie

The system displays all qualifications owned by this employee in the “Manage My People’s Qualifications” section of the page. Skim through the “Category” and “Qualification” columns to determine if the employee has the qualification you are checking for.

Manage My Peoples Qualifications							
Person	Person	Update Date	Category	Qualification	Department	Eval Type	Job Title
Edit Qualification	Allen,Thomas	11/3/2015	Cert-MS-MCA	MCA: MS Exchange Server	IT Services	Manager	Integration Adminis
Edit Qualification	Allen,Thomas	11/3/2015	Cert-MS-MCSE	Communication	IT Services	Manager	Integration Adminis
Edit Qualification	Allen,Thomas	11/3/2015	Cert-MS-MCA	MCA: MS SharePoint Server	IT Services	Manager	Integration Adminis

You can also search for qualifications according to various filters using the “Search My People’s Qualifications & Attributes” section of the page. Please read the table below to understand the function of each filter.

QUALIFICATION FILTERS

FILTER	MEANING
Person	The employee being considered
Qualification	The name of the qualification you want to retrieve
Eval Type	The person who entered the qualification into the system, either the employee or the manager. If you set to employee, qualifications

	entered by managers will not be displayed, and vice versa
Bus. Region	The region where the employee is located
Category	The category under which the qualification is grouped, e.g. Cert-MS-MCA
Expiration Date	The expiry date of the qualification. Setting this to a future date ensures the qualification returned has not expired
Update	The date on which the qualification was last updated

HOW TO ADD QUALIFICATIONS

Go to **My People > Manage People**, skim through the list of people to find the person you want to work with, and click **Qualifications**.

In the “Add/Edit My People’s Qualifications” section of the page, select the name of the employee from the “Person” dropdown list, select the qualification you want to add from the “Qualification” dropdown list, set the “Score” to True, and leave the “Evaluation Type” as Manager.

Next, set the “Update Date” or leave to set to current date, and then set the “Expiration Date” if known. If the qualification is associated to the company, tick the “Assoc. to Company” checkbox. Lastly enter “Years of Experience” and “Certificate Identifier” if necessary, and click **Add**.

Add/Edit My People's Qualifications

Person*

Qualification*

Score*

Evaluation Type*

Update Date*

Expiration Date

Assoc. to Company [? Help](#)

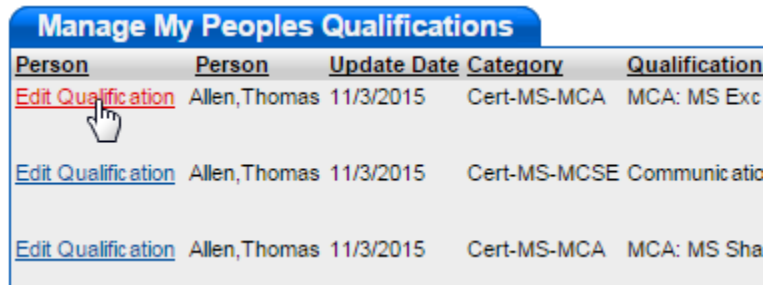
Years of Experience

Certification Identifier [? Help](#)

HOW TO EDIT OR DELETE QUALIFICATIONS

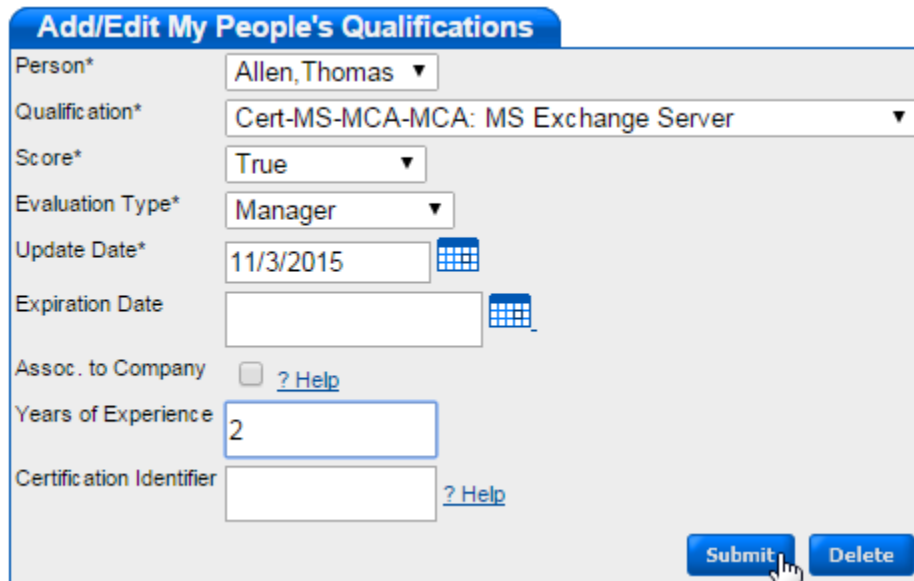
Go to **My People > Manage People**, skim through the list of people to find the person you want to work with, and click **Qualifications**.

Search through the qualifications displayed in the “Manage My People’s Qualifications” section of the page to find the qualification you want to edit or delete and click **Edit Qualification**.



Person	Person	Update Date	Category	Qualification
Edit Qualification	Allen, Thomas	11/3/2015	Cert-MS-MCA	MCA: MS Exchange Server
Edit Qualification	Allen, Thomas	11/3/2015	Cert-MS-MCSE	Communications
Edit Qualification	Allen, Thomas	11/3/2015	Cert-MS-MCA	MCA: MS SharePoint

Clicking on **Edit Qualification** causes the system to load the details of this qualification into the “Add/Edit My People’s Qualifications” section of the page.



Add/Edit My People's Qualifications

Person* Allen, Thomas

Qualification* Cert-MS-MCA-MCA: MS Exchange Server

Score* True

Evaluation Type* Manager

Update Date* 11/3/2015

Expiration Date

Assoc. to Company ? Help

Years of Experience 2

Certification Identifier ? Help

Submit Delete

Make the required changes and click **Submit**. Or if you want to delete the qualification, simply click **Delete** instead.

EXPERT SEARCH FEATURE

The expert search feature gives you an easy way to find employees who have the skills and qualifications you need, possibly to staff a project.

Click **Find An Expert** on the menu bar to access this feature.

The screenshot shows the 'Find An Expert' search form. It features three main sections for filtering results:

- Skills & Attributes - Select where all of the following apply (creates "and" condition):** This section includes two pairs of dropdown menus. The first pair is 'Select Skill' (with 'Admin-Security Services' selected) and '>=Score' (with 'Competent' selected). The second pair is 'Select Skill' (with 'Admin-Documentation' selected) and '>=Score' (with 'Select Value' selected). Below these is a 'Select Attribute' dropdown set to '= True'.
- Geography - Select where all of the following apply (creates "and" condition):** This section includes a 'Select Business Region' dropdown (set to 'Select Value') and a 'Select City' dropdown (set to 'Select Value').
- Skills & Attributes - Select where any of the following apply (creates "or" condition):** This section includes one pair of dropdown menus: 'Select Skill' (set to 'Select Value') and '>=Score' (set to 'Select Value').

At the bottom of the form, there is a 'Clear' button on the left and a 'Search' button on the right. A blue arrow points from the 'Find An Expert' button above to the search form.

To search for an expert, select the skill you want from the "Select Skill" dropdown menu and select the minimum competency level for that skill, using the ">=Score" dropdown menu.

If you want the people returned to also have some other skill, select this skill and competency level using the next "Select Skill" and ">=Score" dropdown menu pair. You can also select business region and city using the appropriate dropdown menus.

After all filters are set, click **Search** to view people who match your criteria.

MANAGER REPORTING FEATURES

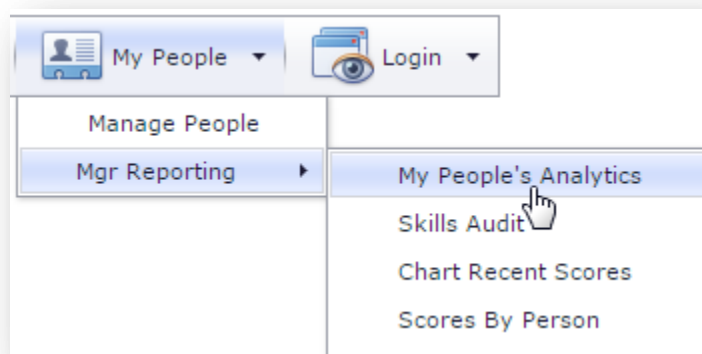
Skills DB Pro provides a number of tools for generating reports. The major tool – My People's Analytics – will be covered in this section. We will only describe the function of the others as they are quite easy to use.

While we will give as much a detailed explanation as possible, you would need to play with the analytics module for a while to fully understand how it works.

MY PEOPLE'S ANALYTICS

With this feature, you can prepare skill matrices and reports by dragging and dropping filters as needed.

To use this feature, go to **My People > Mgr Reporting > My People's Analytics**.



The default view of the analytics module is shown below.

Page 1 of 7 (605 items) 1 2 3 4 5 6 7

Count People Type Type Exp Department City StateProvince Active Person Scoring Updated Job Title IsAttribute Region Country Sec Group

Avg Score Row Area Eval Type Column Area

Person	Category	Skill	Manager	Self Evaluation	Grand Total
Adams, Joann Id:75	▼ Cert-MS-MCTS	MS BizTalk Server 2010		1.00	1.00
	▼ IT-Network	Storage	1.00	3.00	2.00
		ASP.NET with SQL Server 8.0	5.00	4.00	4.50
		Data Modelling	5.00	5.00	5.00
		Dimdim	4.00	2.00	3.00
	▼ IT-Programmin	Google Maps API	3.00	2.00	2.50
		Honeycomb	4.00	1.00	2.50
		Microsoft Access 2003	3.00		3.00
		Objective-C	4.00	1.00	2.50
		IT-Programmin Total		4.00	2.50
	▼ IT-Server	Email-Exchange	1.00		1.00
	▼ SoftSkills	Management	2.00	2.00	2.00
Adams, Joann Id:75 Total			3.20	2.33	2.79
Allen, Thomas Id:94	▼ Admin	Documentation		3.00	3.00
	▼ Cert-MS-MCTS	MS SQL Server 2008, Implementation and Maintenance		1.00	1.00
	▼ IT-Network	Internet Services		5.00	5.00
		ASP 3.0	2.00		2.00
		ASP.Net 3.5 using VB		2.00	2.00
		Designing for Mobile Applications		3.00	3.00
	▼ IT-Programmin	Google Android Programming		2.00	2.00
		Palm webOS Application Development		2.00	2.00
		Paypal Integration for Web	5.00		5.00
		SAP Netweaver	1.00		1.00
	VB.NET 2003	5.00		5.00	
	IT-Programmin Total		3.25	2.25	2.75

Filters

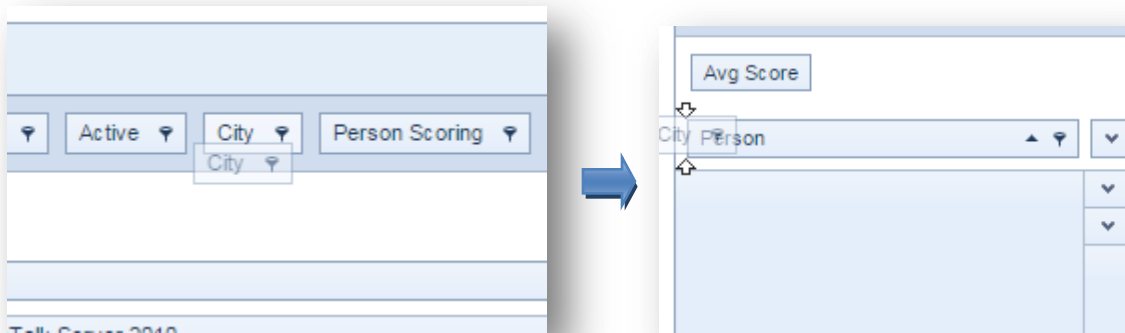
Reports Pane

First let's interpret a section of the data above.

- ⇒ Under "Person" in the row area, we can see the name Adams Joann.
- ⇒ Under "Category" we see the various categories under which Adams Joann's skills are grouped. We immediately see that she has much IT experience as most skills are under IT-Programming.
- ⇒ Under "Skill" we see the various skills for which she has been scored, and we can see that these skills map to their categories on the left.
- ⇒ In the column area, we can see the scores entered for each skill by you the manager, and by Joann herself (self evaluation). You can also see the average of both scores in the "Grand Total" Column.

USING REPORT FILTERS

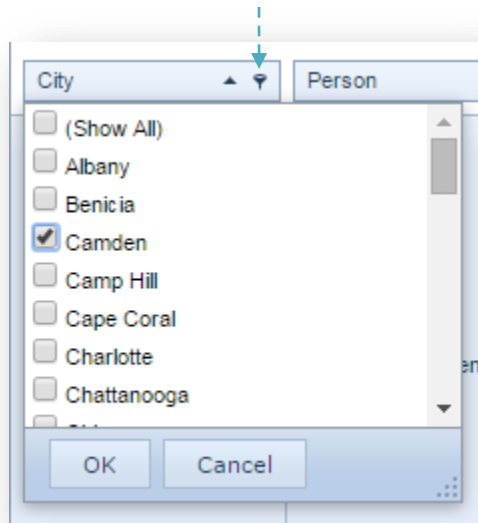
Filters are used to drill down on, or structure the report however you want. You can drag and drop filters, as well as select options within the filters. For example, to filter by city, drag "City" from the upper filter section to the section just above the reports pane.



The reports are now grouped by city as can be seen in the picture below.

City	Person	Category	Skill	Manager	Self Evaluation	Grand Total
Albany	Pierson, Marlene Id:43	Cert-MS-MCPD	Windows Phone		1.00	1.00
			Google AdWords API		2.00	2.00
		IT-Programmin	Honeycomb		3.00	3.00
			JDBC 2.1	5.00		5.00
			Microsoft Visual Studio	1.00		1.00
			Redhat Linux 9.0 General		2.00	2.00
			Ruby	1.00		1.00
			SQL	1.00		1.00
			IT-Programmin Total	2.00	2.33	2.14
		IT-Server	Application-Forefront		2.00	2.00
			Hardware-HP	2.00		2.00
		IT-Server Total	2.00	2.00	2.00	
		SoftSkills	Sales		2.00	2.00
		Pierson, Marlene Id:43 Total				2.00
Benicia	Wiley, Suzanne Id:44	IT-Programmin	COM		1.00	1.00
			DB2 Admin		4.00	4.00
			DHTML		1.00	1.00
			Facebook Connect	1.00		1.00
			Joomla! 1.5	3.00		3.00
			PBworks	2.00		2.00
			PHP5		1.00	1.00
			Ruby on Rails		3.00	3.00
			Symbian C++		3.00	3.00
			IT-Programmin Total	2.00	2.17	2.11
		IT-Server	Storage-SAN	3.00		3.00
			Virtualization-Vmware		1.00	1.00
IT-Server Total	3.00	1.00	2.00			
Wiley, Suzanne Id:44 Total				2.25	2.00	2.09
		Cert-MS-MCTS	MS BizTalk Server 2010		1.00	1.00
		IT-Network	Storage	1.00	3.00	2.00

You can also drill down on reports by using the option within filters. If for example, you only want to see employees who are located in Camden, click on the pin-like symbol within the city filter, uncheck “Show All”, check “Camden”, and click **OK**.

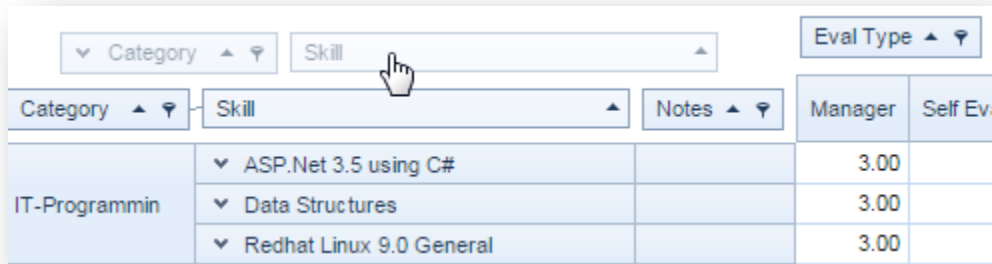


The report now displayed will only include employees located in Camden. Our report below shows just one employee as that is the only employee located in Camden, and assigned to the manager used in this guide.

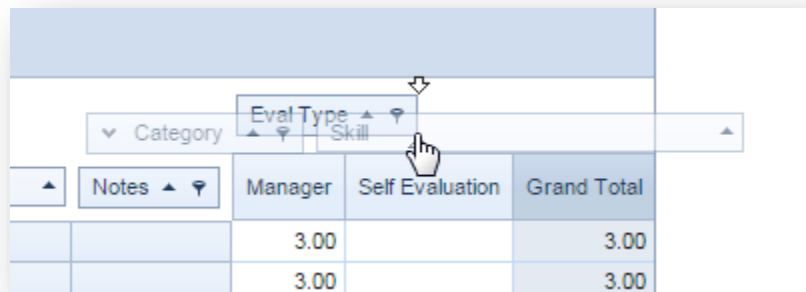
Standard Reports Our Reports Save Cancel To Excel To CSV To Pdf To Html											
Count	People Type	Type Exp	Department	StateProvince	Active	Person Scoring	Updated	IsAttribute	Region		
Avg Score									Eval Type		
City	Person	Category	Skill	Manager							
Camden	Adams, Joann Id:75	▼ Cert-MS-MCTS	MS BizTalk Server 2010								
		▼ IT-Network	Storage	1							
			ASP.NET with SQL Server 8.0	5							
			Data Modelling	5							
			Dimdim	4							
		▼ IT-Programmin	Google Maps API	3							
			Honeycomb	4							
			Microsoft Access 2003	3							
			Objective-C	4							
		IT-Programmin Total				4					
		▼ IT-Server	Email-Exchange	1							
		▼ SoftSkills	Management	2							
Adams, Joann Id:75 Total				3							

HOW TO CREATE A STANDARD SKILLS MATRIX

You can create a standard skills matrix by moving some filters from the row area to the column area. In the example shown below, we moved the “Category Skill” filter to accomplish this.



Category	Skill	Notes	Manager	Self Ev
IT-Programmin	ASP.Net 3.5 using C#		3.00	
	Data Structures		3.00	
	Redhat Linux 9.0 General		3.00	



Notes	Manager	Self Evaluation	Grand Total
	3.00		3.00
	3.00		3.00

The result of this is a standard skills matrix for employees (see picture below.)

Avg Score		Eval Type	Category	Skill	Manager																
Person	Admin				Admin Total	Cert-MS-MCA		Cert-MS-MCA Total	Cert-MS-MCDBA	Education	IT-Network						IT-Network Total	IT-Programmin			
	Documentation	Password Reset	Security Services	User MAC		MCA: MS SharePoint Server	MCA: MS SQL Server		MS Certified Database Administrator	BS MIS	Cabling	Firewall	Internet Services	IOS-Apple	Modem/Router	Peripheral		Storage	Apache Server (2.0 Family)	ASP 3.0	ASP.Net 2.0 using C#
Adams, Joann Id:75																1.00	1.00				
Allen, Thomas Id:94																		2.00			
Anderson, Mary Id:130				5.00	5.00	1.00	1.00	1.00													
Andrews, Sophie Id:113																					
Angelo, Michael Id:101																					
Ballou, Saul Id:90			4.00		4.00																
Banks, Hilda Id:132	3.00				3.00													4.00			
Basinger, Margaret Id:111	3.00				3.00							5.00									
Bass, Leslie Id:52	5.00		1.00		3.00																
Belanger, Jeff Id:38	2.00				2.00													3.00			
Brady, Juan Id:22																					
Bruce, Philipe Id:110		4.00			4.00														3.00	4.00	
Bucklin, Arcelia Id:45																		4.00			
Burton, James												3.00		1.00						2.00	

Many different views like this can be generated by dragging and dropping filters. Please take some time to familiarize yourself with the results of different drag-and-drop actions.

OTHER REPORTING FEATURES

SKILLS AUDIT

Location: My People > Mgr Reporting > Skills Audit

Function: Provides a way to get a view of the number of people with a skill, grouped according to their level of competency. The main page contains all skills, but you can drill down using the “Filter Skills Audit” section of the page.

CHART RECENT SCORES

Location: My People > Mgr Reporting > Chart Recent Scores

Function: Produces a graphical chart of the most recent scores entered for the selected employee.

SCORES BY PERSON

Location: My People > Mgr Reporting > Scores By Person

Function: Gives a very detailed view of skills and certifications for any selected employee. There are quite a few filters with which the information returned can be controlled.

EXPIRATIONS

Location: My People > Mgr Reporting > Expirations

Function: Used to find out if and when qualifications are expiring. You can set the date filter so the system returns expired, or soon to expire certificates. If you put the current date for example, certifications that are expired, or that will expire on that day are displayed.

MY PEOPLE'S GOALS

Location: My People > Mgr Reporting > My People's Goals

Function: Can be used to compare an employee's current skills with the skill requirements for any job title. Useful for seeking out employees who can fill an open

position, as well as determining what skills an employee needs to learn, or improve upon, to better perform the requirements of their current position.

BUILD THE ULTIMATE TEAM

We hope you now have a good understanding of the functions of various parts of the system, and can now see how you can apply them to the unique requirements of your company.

Please take advantage of the powerful features covered, and create the ultimate team.