



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.

This 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 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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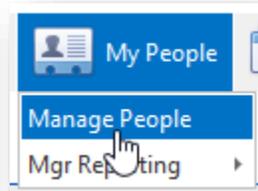
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VIEW EMPLOYEE DETAILS

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.



Enter text to search...							
New				Last Name ▲ 🔍	First Name ▲ 🔍	Your ID 🔍	Active 🔍
				<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Edit Delete	Password	Skills	Files	Angelo	Michael	6198	<input checked="" type="checkbox"/>
Edit Delete	Password	Skills	Files	Apple	Leslie	6016	<input checked="" type="checkbox"/>
Edit Delete	Password	Skills	Files	Banks	Hilda	6260	<input checked="" type="checkbox"/>
Edit Delete	Password	Skills	Files	Basinger	Margaret	6218	<input checked="" type="checkbox"/>
Edit Delete	Password	Skills	Files	Black	Tereasa	6010	<input checked="" type="checkbox"/>

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, or to upload new documents.

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**.



Edit Delete	Password	Skills	Files	Apple	Leslie	60
Edit Delete	Password	Skills	Files	Banks	Hilda	62
Edit Delete	Password	Skills	Files	Basinger	Margaret	62
Edit Delete	Password	Skills	Files	Black	Tereasa	60
Edit Delete	Password	Skills	Files	Burgess	Deborah	62

In the next page, switch to the Skills tab to view and work with this person's skills.



HOW TO ADD, EDIT, AND DELETE SKILL SCORES

To add manager score for a skill already rated by an employee, click **Add Manager Score** (this option only appears if you have not added a score for that skill).

Edit Delete	IT-Programming	Apache
Edit Delete	IT-Programming	ASP.Net
Add Manager Score	IT-Programming	DB2 Adr
Add Manager Score	IT-Programming	DOS

In the popup window, select the score from the “Manager” drop down, enter years of experience and notes if necessary, and click **Update**.

Edit Form ×

Manager:*

Years of Experience:

Notes:

[Update](#) [Cancel](#)

After entering manager score, *you can edit or delete it.*

To edit, click **Edit**, make the necessary changes, and click **Update**.

To delete, click **Delete**, and click **OK**.

Note: The skills score system is single blind, which means employees cannot see the scores you entered for them unless 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 by the employee. Often though, you may want to rate an employee on a skill not yet added by the employee.

To do this, go to **My People > Manage People**, skim through the list for the employee you want to rate, and click **Skills**.

On the top right of the page, click **Add additional skills for this employee**.

Export Assessment to Excel Add additional skills for this employee

Manager Assessment

Search Clear

In the “Add Additional Manager Skills” section of the next page, click the skill you want to add.

Add Additional Manager Skills

Enter text to search... Search Clear

Click on a row to add a skill. Search for skills above. Filter by skills below.

#	Skill	Main Category
<input checked="" type="radio"/>	Basic Accounting for Business	Accounting
<input type="radio"/>	Accounts Payable	Accounting

Next, select the score, add years of experience and notes if necessary, and click **Add Skill**.

Add Skill

Score:* Some Knowledge Some Training Competent Highly Competent Expert

Years Of Experience: 5

Score Notes: Took a course

Add Skill Cancel

VIEWING, ADDING, AND EDITING QUALIFICATIONS

A qualification is an entry that is either true or false. For example, “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.

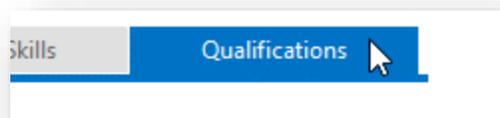
HOW TO VIEW QUALIFICATIONS

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 **Skills**.



Edit Delete	Password	Skills	Files	Apple	Leslie	60
Edit Delete	Password	Skills	Files	Banks	Hilda	62
Edit Delete	Password	Skills	Files	Basinger	Margaret	62
Edit Delete	Password	Skills	Files	Black	Tereasa	60
Edit Delete	Password	Skills	Files	Burgess	Deborah	62

Switch to the “Qualifications” tab.



All qualifications already entered for this users can be seen in the “Qualifications” list on the right.

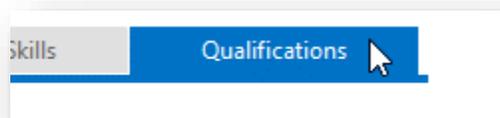
Qualifications			
Enter text to search...		Search	Clear
Edit and Delete Qualifications			
#	Qualification	Category	Update Date
Edit Delete	MCA: MS SharePoint Server	Cert-MS-MCA	1/24/2017
Edit Delete	Web Applications	Cert-MS-MCSD	1/24/2017
Edit Delete	Messaging	Cert-MS-MCSE	1/24/2017

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 **Skills**.

Edit Delete	Password	Skills	Files	Apple	Leslie	60
Edit Delete	Password	Skills	Files	Banks	Hilda	62
Edit Delete	Password	Skills	Files	Basinger	Margaret	62
Edit Delete	Password	Skills	Files	Black	Tereasa	60
Edit Delete	Password	Skills	Files	Burgess	Deborah	62

Switch to the “Qualifications” tab.



Scan the list on the left for the qualification you want to add and click on it.

#	Qualification	Category 1	Cat 2	Cat 3
<input type="radio"/>	BS MIS	Cert-Education		
<input checked="" type="radio"/>	Masters Degree	Cert-Education		
<input type="radio"/>	MCA: MS Exchange Server	Cert	MS	MCA
<input type="radio"/>	MCA: MS SQL Server	Cert	MS	MCA

Enter expiry date and certificate identifier. Next, enter years of experience and notes if necessary, and click **Update**.

Add Qualification ×

Expiration Date: Certification Identifier:

Years of Experience:

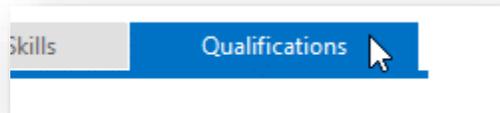
Notes:

[Update](#) [Cancel](#)

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 **Skills**.

Switch to the “Qualifications” tab.



In the list under “Qualifications” on the right, you will see already added qualifications that you can edit or delete.

To edit a qualification, click **Edit** on that qualification, make the necessary changes, and click **Update**.

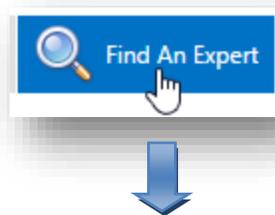
MCA: MS SharePoint Server		Cert-MS-MCA	1/24/2017
Expiration Date:	1/3/2018	Certification Identifier:	123456789
Years:	5	Notes:	
			Update Cancel

To delete a qualification, click **Delete** on that qualification, and confirm.

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.



Export to Excel Screen Help

Page 1 of 48 (2400 items) 1 2 3 4 5 6 7 ... 46 47 48 All Page size: 50

Enter text to search... Search Clear

Name ▾

Category	Skill	Score	Qualification	Eval Type	Updated	Employee Info						
						Email	Company	Title	Department	City	Region	Type
Name: Adams, Joann ID: m6146 Business#: 303-555-1212 Mobile #:303-555-1212 : JoannVAdams@mailinator.com												
Cert-MS-MCA	MCA: MS Exchange Server		True	Manager	1/27/2016	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	Apache Server (2.0 Family)	5		Manager	6/27/2016	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	ASPNET with SQL Server 8.0	4		Self Evaluation	11/15/2012	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	ASPNET with SQL Server 8.0	5		Manager	7/2/2013	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	Compiler Design	4		Self Evaluation	1/20/2016	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	Compiler Design	4		Manager	1/20/2016	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
SoftSkills	Management	2		Manager	10/19/2013	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
SoftSkills	Management	2		Self Evaluation	10/31/2012	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	Kernel Programming (Solaris 2.x int...	3		Self Evaluation	1/20/2016	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee
IT-Programmin	Kernel Programming (Solaris 2.x int...	3		Manager	1/20/2016	Email	Idea Infinity	Managing Director		Camden	Englewood	Employee

FINDING PEOPLE WITH THE SEARCH BOX

The first way to search for people is with the search box at the top.

For example, if I want to find people who know Microsoft SharePoint and live in Jersey city, I simply type it into the search box as shown below (after typing, wait a few seconds for the system to fetch results).

Page 1 of 1 (3 items) 1 All

microsoft sharepoint jersey Search Clear

Name ▾

Category	Skill	Score	Qualification	Eval Type	Updated	Employee Info	
						City	
Name: Andrews, Sophie ID: 6222 Business#: 303-555-1212 Mobile #:303-555-1212 : SophieKAndrews@dodgit.com							
IT-Programmin	Microsoft SharePoint Workspace 2010	5		Self Evaluation	11/15/2012	Jersey City	
IT-Programmin	Microsoft SharePoint Workspace 2010	4		Manager	5/18/2015	Jersey City	

Page 1 of 1 (3 items) 1 All

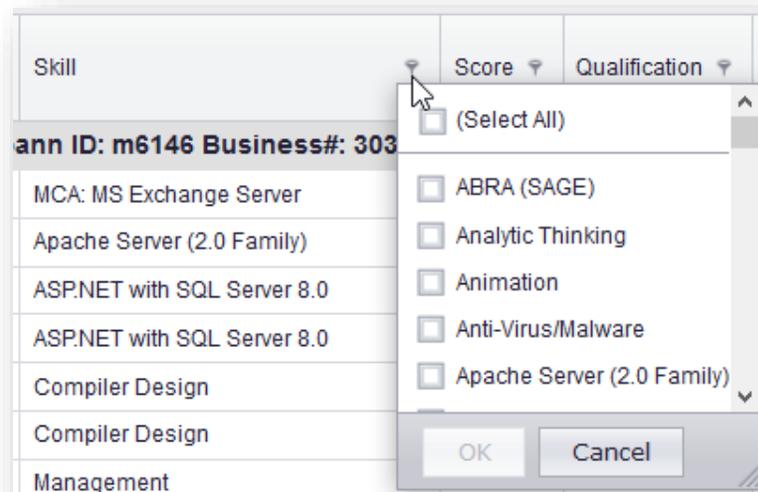
Create Filter

As can be seen in the picture, I typed in “microsoft sharepoint jersey” and the system returned those who meet the criteria, in this case, just one employee.

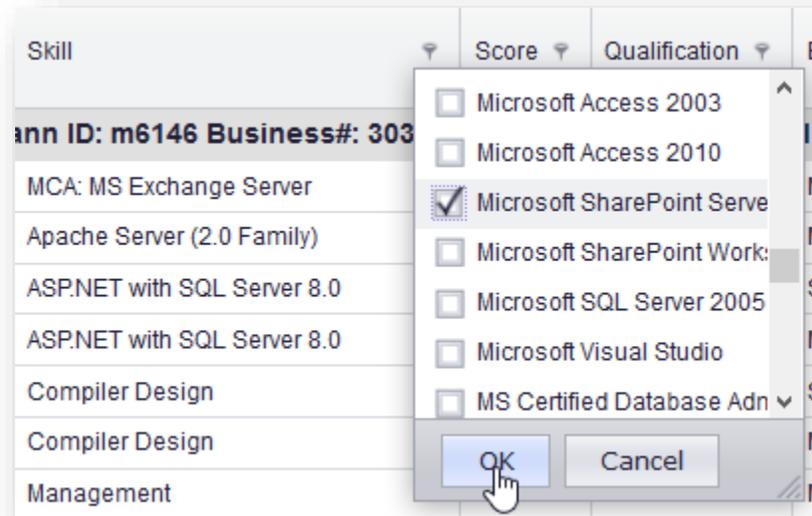
SEARCHING WITH FILTERS

You can perform more advanced searches with the filters in each column. To use filters, click the funnel symbol at the top of each column, and select appropriate filter criteria from the pop up list.

For example, to select people who are skilled in Microsoft SharePoint, click on the funnel icon in the “Skill” column.



Next, Scroll down to find Microsoft SharePoint Server, tick it, and click OK.



The system refreshes the table to display people who have the skill you selected.

Category	Skill	Score	Qualification	Eval Type	Updated
Name: Bucklin, Arcelia ID: 6086 Business#: 303-555-1212 Mobile #:303-555-1212 : ArceliaJB					
IT-Programmin	Microsoft SharePoint Server 2007	4		Self Evaluation	11/15/2012
IT-Programmin	Microsoft SharePoint Server 2007	4		Manager	12/23/2014
Name: Cotta, Samuel ID: 6074 Business#: 303-555-1212 Mobile #:303-555-1212 : SamuelIMC					
IT-Programmin	Microsoft SharePoint Server 2007	2		Manager	11/15/2012
Name: Douglas, Lucy ID: 6278 Business#: 303-555-1212 Mobile #:303-555-1212 : LucyADoug					
IT-Programmin	Microsoft SharePoint Server 2007	1		Self Evaluation	11/15/2012
Name: Engstrom, James ID: 6364 Business#: 303-555-1212 Mobile #:303-555-1212 : JamesS					
IT-Programmin	Microsoft SharePoint Server 2007	2		Self Evaluation	11/15/2012
Name: Graves, Kim ID: 6268 Business#: 303-555-1212 Mobile #:303-555-1212 : KimMGraves					

Note: You can select more than one skill to have the system return people who have a mix of skills.

In a similar way as we set the skill filter above, we can also set other filters that restrict the list of people returned to particular cities, departments, regions, etc.

MANAGER REPORTING FEATURES

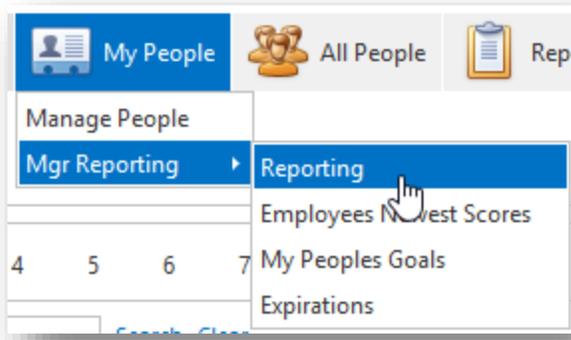
Skills DB Pro provides a number of tools for generating reports. The major tool – Report Builder – will be covered in this section. We will only describe the function of the others as they are quite easy to use.

While we will give as much a detailed explanation as possible, you will need to play with the analytics module 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 > Reporting**.



The default view of the Report Builder is shown below

Standard Reports

Our Reports

Save

Cancel

To Excel

To CSV

To Pdf

To Html

Page 1 of 2 (144 items)



1

2



Count

Department

City

Active

Person Scoring

Job Title

Is Attribute

Region

Country

Avg Score

Eval Type

Person

Category

Skill

Notes

Employee

Manager

Grand Total

Accounting Human Resources Bucklin, Arcelia Id:19	Basic Accounting for Business		3.00	2.00	2.50	
	Accounts Receivable		0.00		0.00	
	Activity Based Costing			0.00	0.00	
	Budget		0.00		0.00	
	Cash Flow Statement		2.00	2.00	2.00	
	Accounting Total			1.25	1.33	1.29
	ABRA (SAGE)		2.00	2.00	2.00	
	Counseling People		0.00		0.00	
	Customer Service		4.00	2.00	3.00	
	Delegating		0.00		0.00	
	Enforcing rules or Policies		5.00	5.00	5.00	
	Interviewing		2.00	2.00	2.00	
	Leadership		1.00	1.00	1.00	
	Human Resources Total			2.00	2.40	2.17
	.NET		0.00		0.00	
	Active Directory		4.00	4.00	4.00	
	ADO		3.00	2.00	2.50	
	C		4.00	2.00	3.00	
	C Shell		4.00	4.00	4.00	
	Data Analytics		5.00	5.00	5.00	

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

- ⇒ Under "Person" in the row area, we can see the name Bucklin Arcelia.
- ⇒ Under "Category" we see the various categories under which Bucklin Arcelia's skills are grouped. We immediately see that he has much Human Resource and Accounting experience as most skills are under those categories.
- ⇒ Under "Skill" we see the various skills for which he 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.

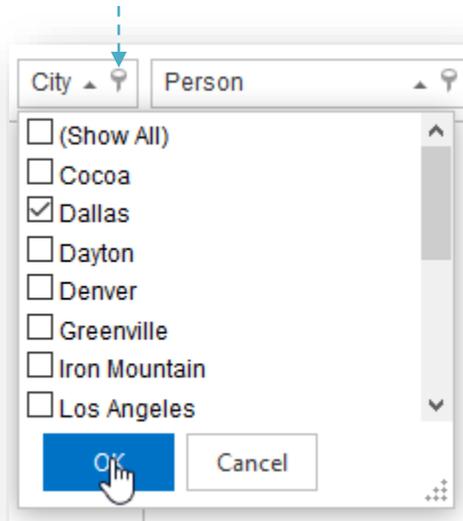
Page 1 of 5 (243 items) 1 2 3 4 5 Rows per page: 50

Department | Gap | Count | Active | Scoring Person | Qualification | Region | Job Title

Avg Score | Eval Type

City	Person	Category	Skill	Employee	Manager	Grand Total	
Cocoa	Carignan, William Id:122	Administration	Security Services	3.00	2.00	2.50	
		Cert-MS-MCA	MCA: MS SharePoint Server	1.00		1.00	
		IT-Programming	ASP.Net 3.5 using C#			2.00	2.00
			Atom		3.00		3.00
			Checkpoint Security		2.00		2.00
			DB2 Admin			5.00	5.00
			jQuery		3.00		3.00
			Mac OS X 10.5		4.00		4.00
			Palm webOS Application Development			3.00	3.00
			SAP Netweaver			2.00	2.00
			SQL Server 2008		3.00		3.00
IT-Programming Total			3.00	3.00	3.00		

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 Dallas, click on the funnel symbol within the city filter, uncheck “Show All”, check “Dallas”, and click **OK**.

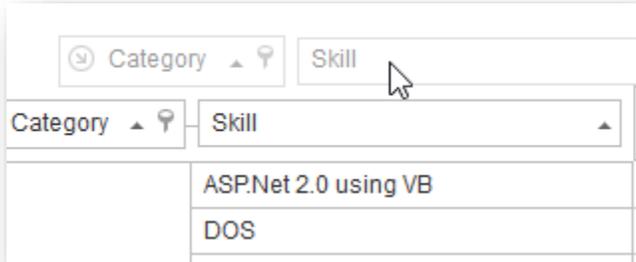


The report now displayed will only include employees located in Dallas. Our report below shows just one employee as that is the only employee located in Dallas, and assigned to the manager used in this guide.

City	Person	Category	Skill	Employee	Manager	Grand Total	
Dallas	Copas,Ronald Id:95	IT-Programming	ASP.Net 2.0 using VB	5.00		5.00	
			DOS	3.00		3.00	
			DotNet 3.5 using VB		4.00	4.00	
			Google AdWords API		3.00	3.00	
			JSP 2.0	5.00		5.00	
			Microsoft SharePoint Workspace 2010		2.00	2.00	
			Oracle 10g	1.00		1.00	
			Programming Aptitude	3.00		3.00	
		IT-Programming Total			3.40	3.00	3.25
		IT-Server	Application-XenDesktop	3.00		3.00	
			Email-Entourage	3.00		3.00	
			OS-Small Business Server	2.00		2.00	
			Virtualization-Vmware		3.00	3.00	

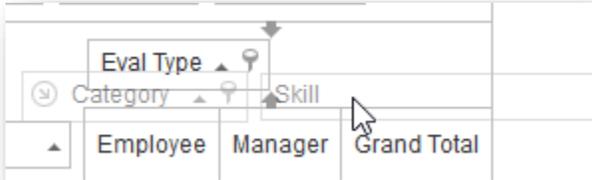
HOW TO CREATE A STANDARD SKILLS MATRIX

You can create a standard skills matrix by moving the Category-Skills filter from the row area to the column area.



The screenshot shows a PivotTable with a filter for 'Skill' in the row area. The filter is currently set to 'Skill'. Below the filter, the PivotTable shows two rows: 'ASP.Net 2.0 using VB' and 'DOS'.

Category	Skill
	ASP.Net 2.0 using VB
	DOS



The screenshot shows a PivotTable with a filter for 'Skill' in the column area. The filter is currently set to 'Skill'. Below the filter, the PivotTable shows three columns: 'Employee', 'Manager', and 'Grand Total'. The 'Eval Type' filter is also visible in the row area.

Eval Type	Employee	Manager	Grand Total
-----------	----------	---------	-------------

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

Department ▾ Gap ▾ City ▾ Count ▾ Active ▾ Scoring Person ▾ Job Title ▾ Qualification ▾ Region ▾															
Avg Score Eval Type ▾ Category ▾ Skill ▾															
Employee															
Person ▾	Accounting				Human Resources								IT & Programming		
	Basic Accounting for Business	Accounts Receivable	Budget	Accounting Total	ABRA (SAGE)	Compliance	Counseling People	Customer Service	Delegating	Enforcing rules or Policies	Interviewing	Leadership	Human Resources Total	.NET	.NET for Web
Davila, Daniel Id:16	5.00	5.00	4.00	4.67	0.00			0.00	5.00	4.00	5.00		2.80	5.00	4.00
Harper, William Id:12		0.00	1.00	0.50		5.00	1.00	1.00	3.00	1.00		0.00	1.83	2.00	4.00
Jacobs, Melissa Id:27	2.00	0.00		1.00		0.00	4.00			2.00			2.00		
Murrah, Terry Id:21	0.00			0.00		4.00		1.00	3.00		3.00		2.75	2.00	
Smith, Bryon Id:48															

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

EMPLOYEE NEWEST SCORES

Location: My People > Mgr Reporting > Employee Newest Scores

Function: View employee scores that were most recently updated.

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 apply them to the unique requirements of your company.

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