BizSkills

Setup Guide

BIZ LIBRARY

BizSkills Setup Guide

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BIZ LIBRARY

Technical Setup Process

Welcome to BizSkills

Ready to get started?

You can take three approaches when getting started with BizSkills. Route A will get everyone up and running quickly with the ability to browse skills and job titles they're interested in. Route B allows you to add off-the-shelf job roles and/or skills for learners. Route C allows you to customize off-the-shelf job roles and skills. No matter which route you choose, your learners will be able to explore skills and take charge of their own development, whether or not they're linked to a particular job role.

Let's dive in!

First things first - When BizSkills is enabled, you will have a team titled "Client Name BizSkills Team". This team will need to remain intact and any admin or learners using BizSkills should be added to the "Client Name BizSkills Team".

Note: Learners do not have to have a linked job role to live within this team. Placement in this team will ensure learners will be able to select and have content curated for their personal Skill Interests, even if they don't have a linked job role. The full BizSkills interface will be available once the learner is linked to a job role.

Route A

To get started, you'll need to add learners to your BizSkills team, Client Name BizSkills Team, even if they do not have a job role. Adding learners to this team will allow them to browse job titles and skills that may be of interest to them.

Route B

After adding learners to your BizSkills team, you can link them to off-the-shelf job roles from the Job Role Library, as well as off-the-shelf skills from the Skills Library.

Route C

After adding learners to your BizSkills team, you can assign them job roles that you have customized from the Job Role Library.

Let's look at a few examples:

Route A

Maggie is a Marketing Specialist at Woodrow Industries. She currently does not have a job role assigned to her, but she wants to feel more confident when presenting her monthly metrics report to her manager. Her program administrator adds her to the Woodrow Industries BizSkills Team, and Maggie begins browsing the Skills Library. She adds Communications, Data Analysis, and Presentations to her Skills Interests. Throughout the next several weeks, she takes lessons mapped to those skills.

Route B

Bridget is a Web Developer at Woodrow Industries. Her administrator adds her to the Woodrow Industries BizSkills Team and adds the off-the-shelf Web Developer job role and off-the-shelf skills associated with that role. She begins taking lessons to help her become more proficient in her current role.

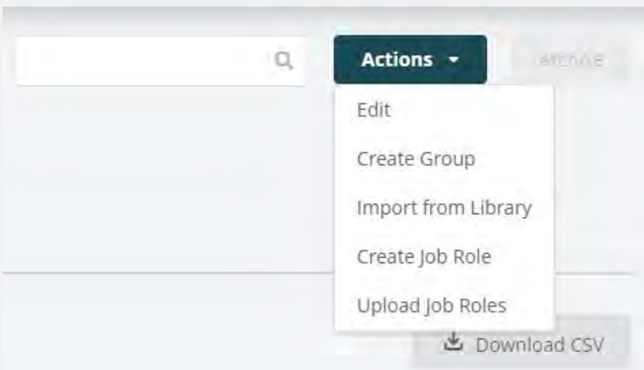
Route C

Jim is starting a new role as a Marketing Manager at Woodrow Industries. Woodrow Industries requires all managers to be trained on safety protocols as they make on-site visits to the manufacturing plant. His administrator adds him to the Woodrow Industries BizSkills Team. He customizes the Marketing Manager job role from the Job Role Library by adding Safety Standards to the list of skills. He then links Jim to the job role, and Jim begins taking training for his new role.

Step 1:
Adding Job Roles

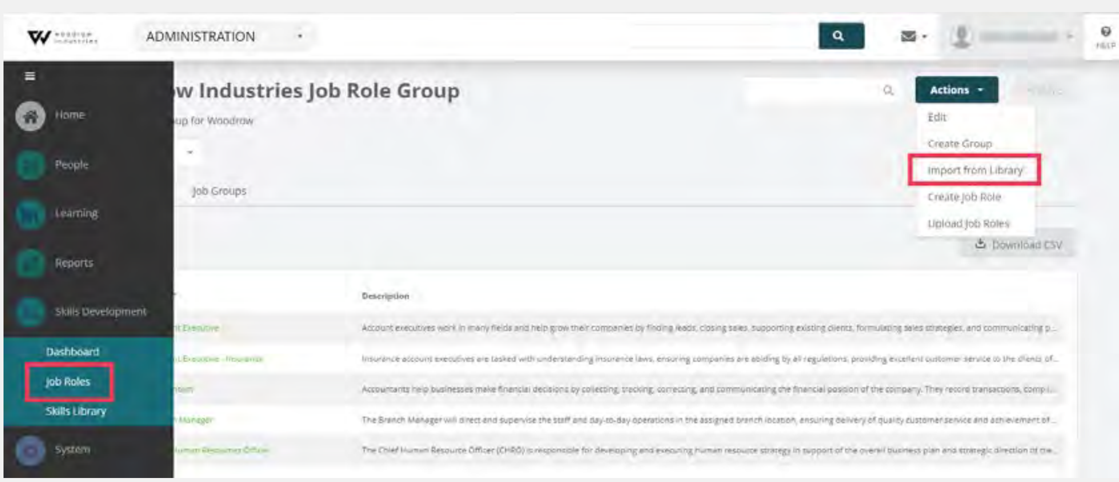
To add job roles to your Job Role Group, you have three options:

1. Import them from BizSkills' off-the-shelf job role library
2. Mass upload job role information with a template
3. Create new job roles from scratch



Importing from the BizSkills Job Role Library:

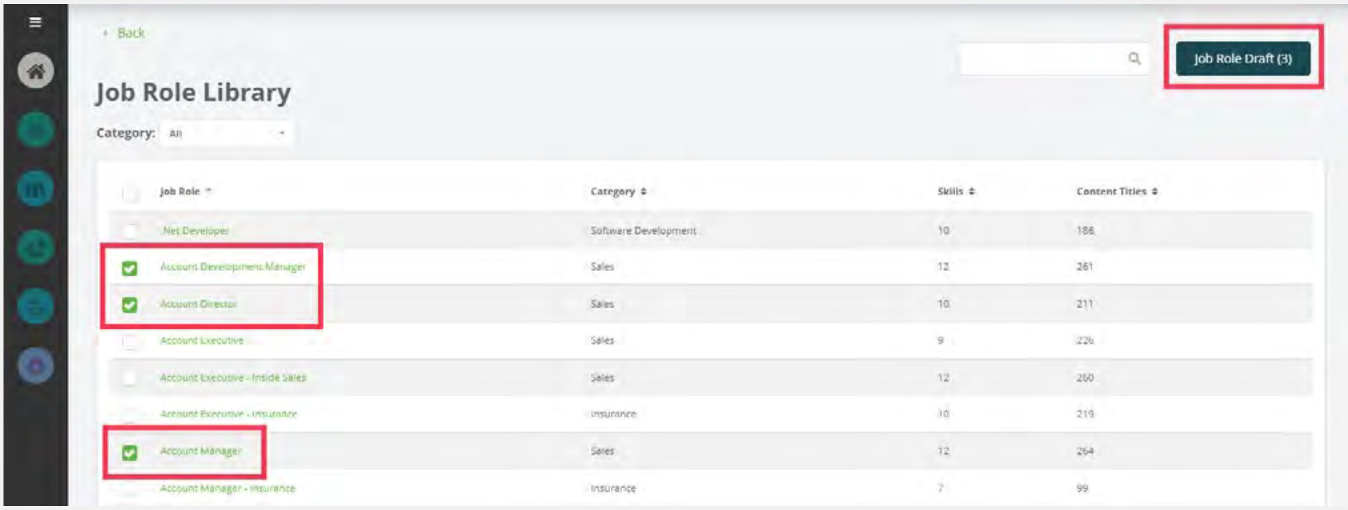
Go to the Skills Development tab > Job Roles, then click the Actions button > Import from Library. From here you can browse job roles by category or use the search field to find specific roles.



PRO TIP:

The search field looks for an exact match within job role titles – searching for "Jr. Data Scientist" will not pull up the role if it's spelled out as "Junior." If you can't find a role, try broadening your search or using the Category filter.

Select the checkbox next to a role to add it to your Job Role Draft. You can continue browsing and adding roles to your draft, but note that **if you exit the page, the draft will not stay saved.**



When you are ready, click the Job Role Draft button and import the selected roles to your Job Role Group.

Editing Job Role Titles on Imported Job Roles:

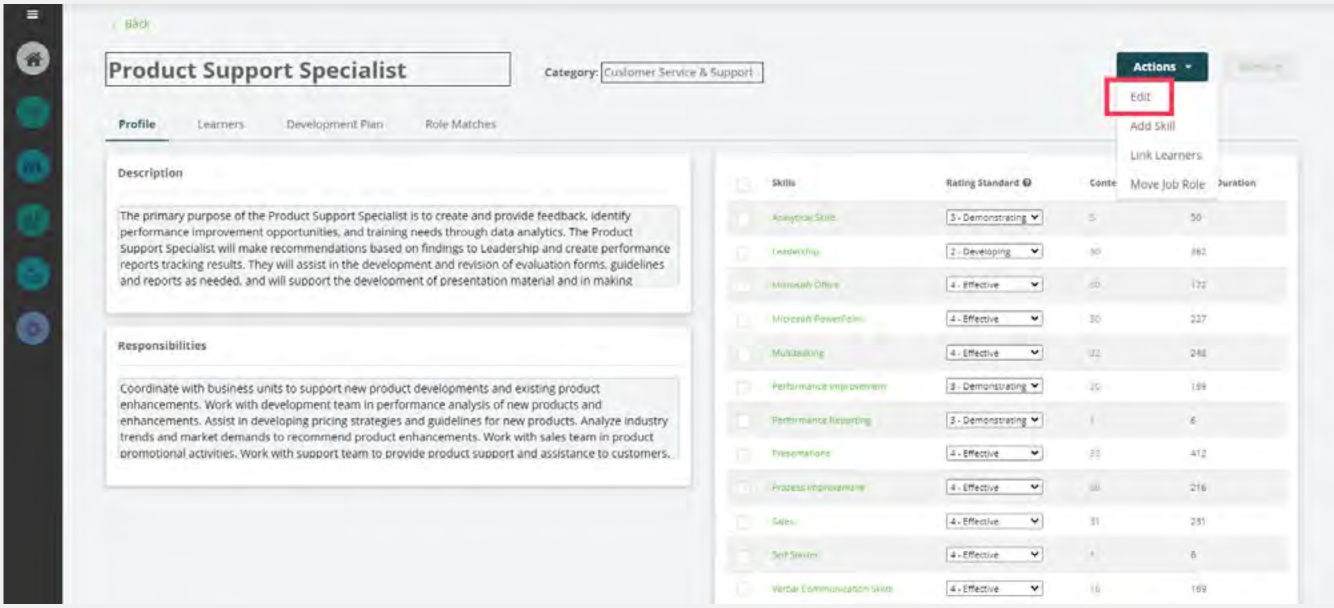
Your learners will be linked to BizSkills via their job role, so the titles need to be an exact match with the roles in your Job Role Group and the actual job roles in your organization.

IMPORTANT! If the titles of off-the-shelf job roles need to be tailored to fit your organization/ learners, it's best to edit those now, so that you'll be able to link learners automatically in Step 2.

To customize a job role, go to your Job Role Group, and click on the job title that you want to customize.

From the job role profile, go to Actions > Edit. This will allow you to edit any of the information about the job role, including the title. Change the title to match what your organization uses, and click the Save button.

If you will want to change more than the job title, instructions for further customizing job roles are in **Step 3**.



Mass Uploading Job Role Data:

If you already have a lot of your own job role data available that you want to upload (could be from an HRIS or similar database) go to your Job Role Group, then Actions > Upload Job Roles.

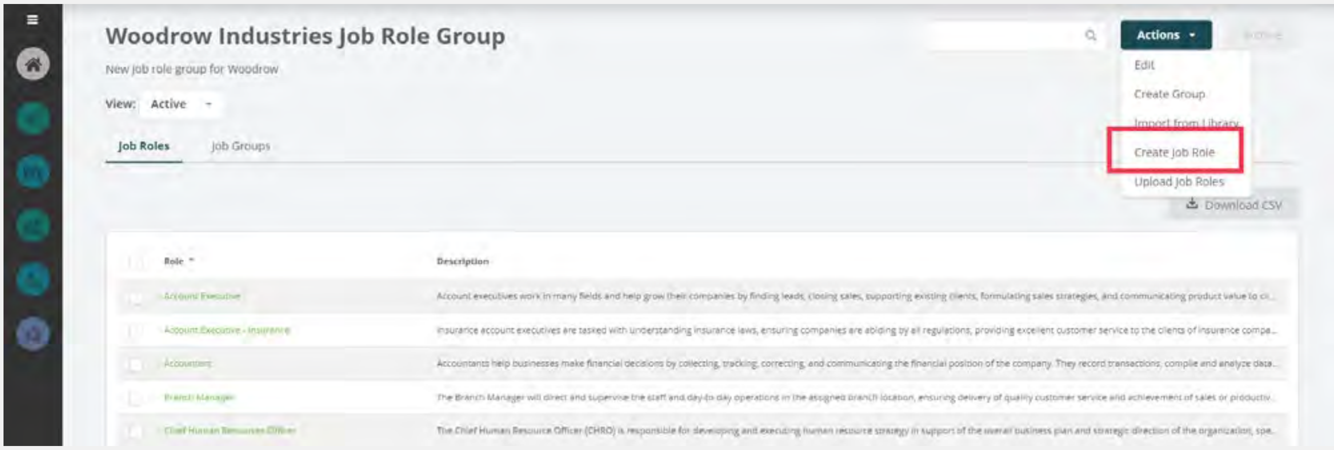
Download the import template and populate your job role info (only job role name is required, other fields are optional), then save the file. Choose your file in the Upload Job Roles pop-up and click Upload.

Adding Job Roles

Creating Custom Job Roles:

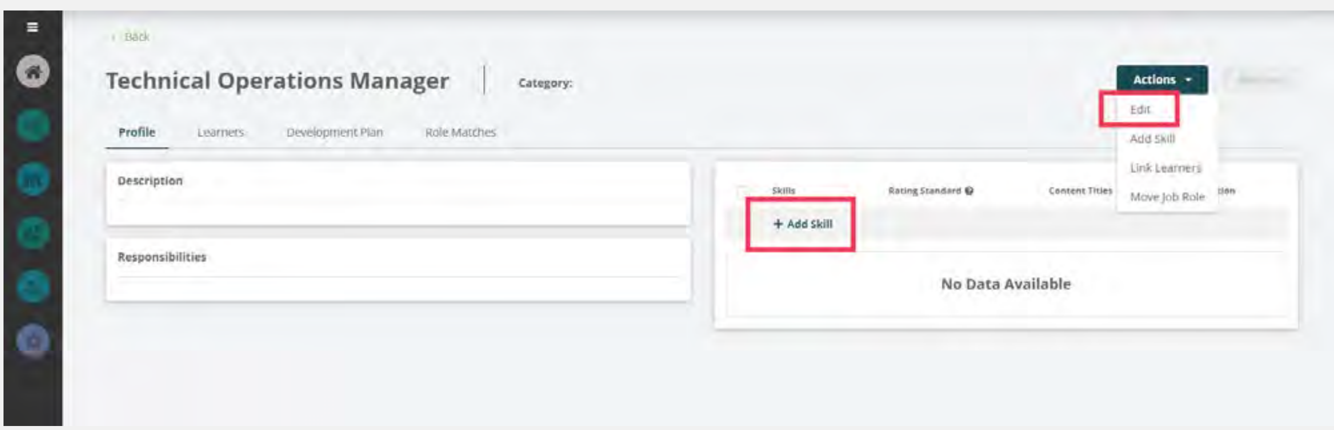
You can also create custom job roles one at a time.

To add a new job role from scratch, go to your Job Role Group > Actions > Create Job Role.

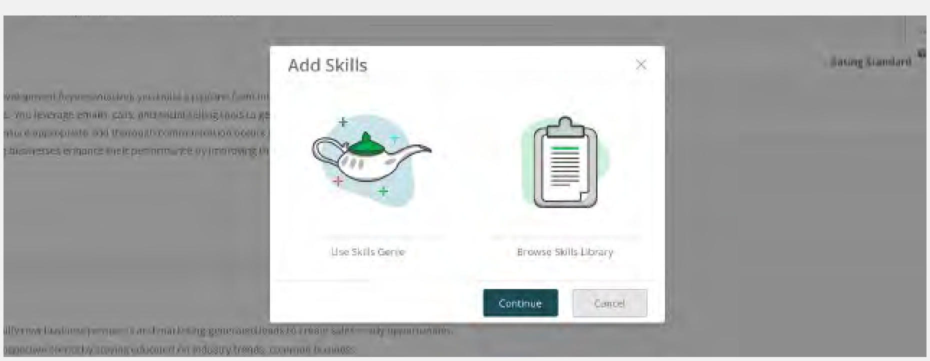


Enter a unique job role title (description is optional) and click Create. The new job role profile page will open.

Go to Actions > Edit to add or change information about the role. Go to Actions > Add Skill or use the Add Skill button to select the skills associated with this job role.



Once your job roles have been added, you're ready to start linking learners! Administrators can use the ***Skills Genie*** feature to return skill recommendations on custom job roles. You will be presented with a list of skills based on job role name, and you will be able to accept the skills you would like to apply.



Step 2:

Linking Learners

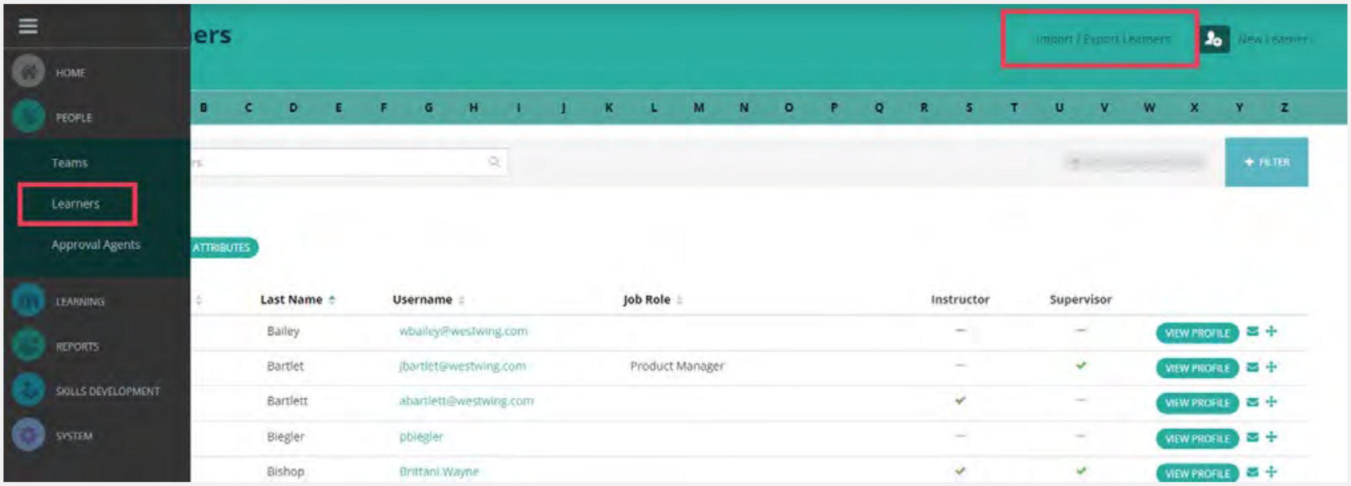
In order to link your learners to BizSkills, they will need a job role added to their learner profile that exactly matches the job role titles you've added to your Job Role Group. You'll also need their supervisor added to enable supervisor/manager ratings on skills.

IMPORTANT! If you've imported off-the-shelf job roles that need their titles adjusted to match the actual job roles of learners in your organization, edit those job role titles first, then come back to this step.

Mass Updating Existing Learners:

The fastest way to update job roles and supervisors for learners already in the system is by exporting a spreadsheet, adding the data, and then importing it.

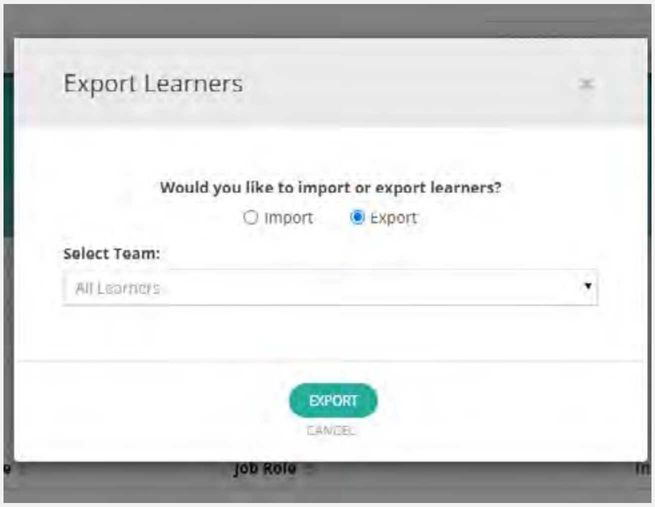
To do this, go to the admin sidebar > People > Learners. On the Learners page, click the Import / Export Learners link in the top right corner.

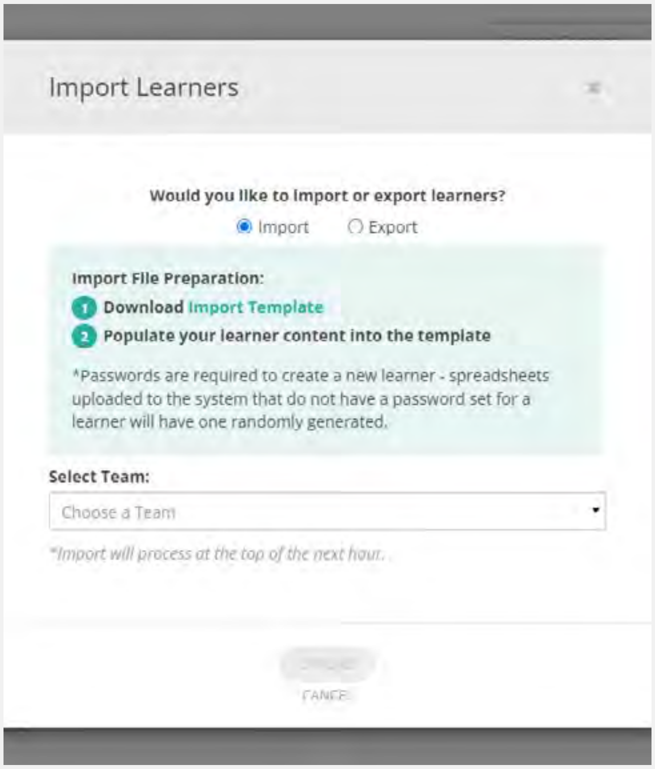


Linking Learners

On the pop-up window, select the Export radio button, select the Team of learners you want to update, then click the Export button.

A spreadsheet of your learner data will download, where you can update the Job Role and Supervisor fields. Remember, **the job roles you add need to exactly match the job role titles in your Job Role Group** in order for the system to automatically link your learners.





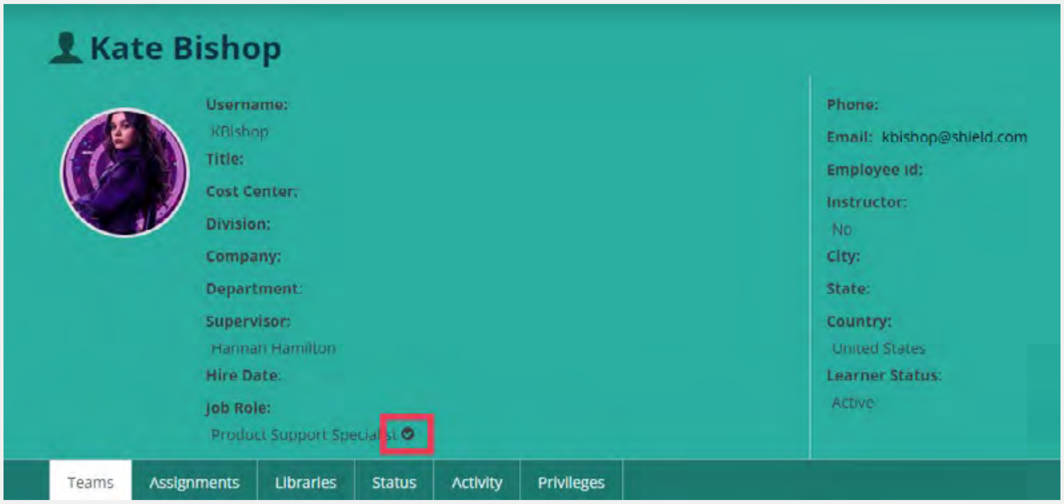
Example: If you've added "Junior Account Manager" to your Job Role Group, giving a learner the job role of "Jr. Account Manager" will not link them because it's not an exact match.

NOTE: The supervisor field uses their username, which may be different from their full name.

Once you've finished updating the spreadsheet, save it to your computer.

Click the Import / Export Learners link again, and select the Import radio button. Choose the same Team of learners you exported, and click the Upload button.

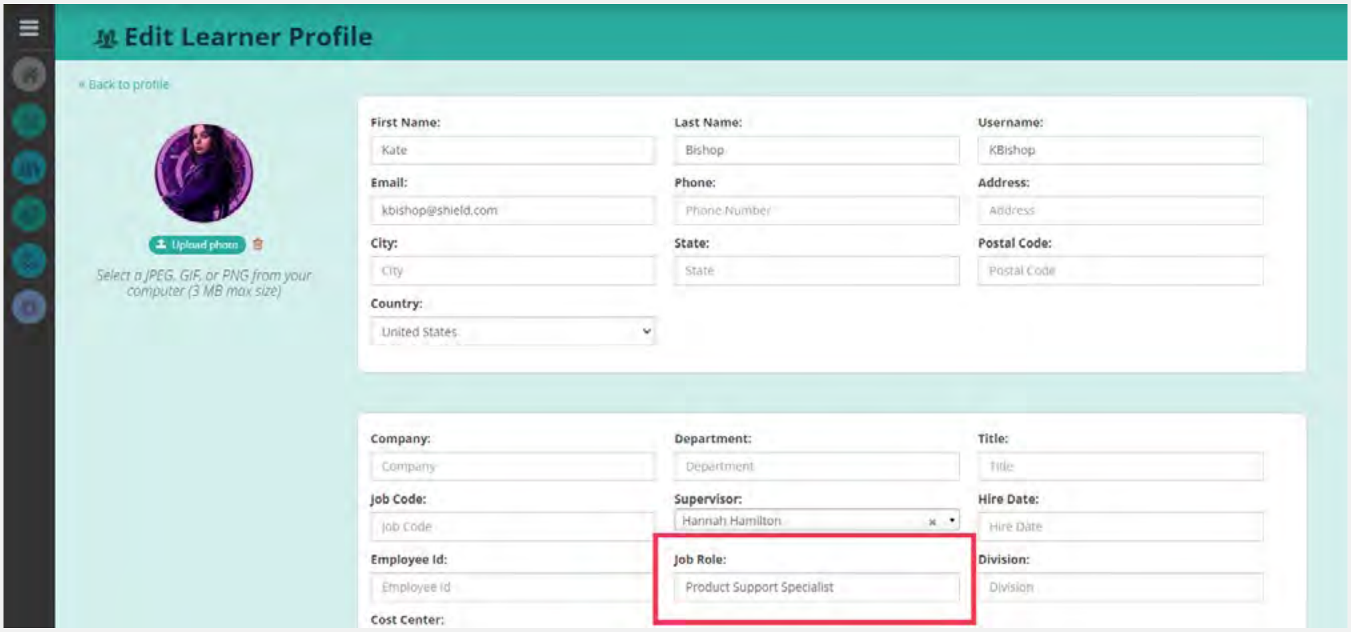
After the import processes at the top of the hour, you can verify that learners have been linked by checking a few learner profiles. If they are linked to a job role in BizSkills, they will have a check mark next to the Job Role field on their profile.



Once a learner has a linked job role, that is when the Skills Development menu item becomes available to them.

Updating Learners Individually:

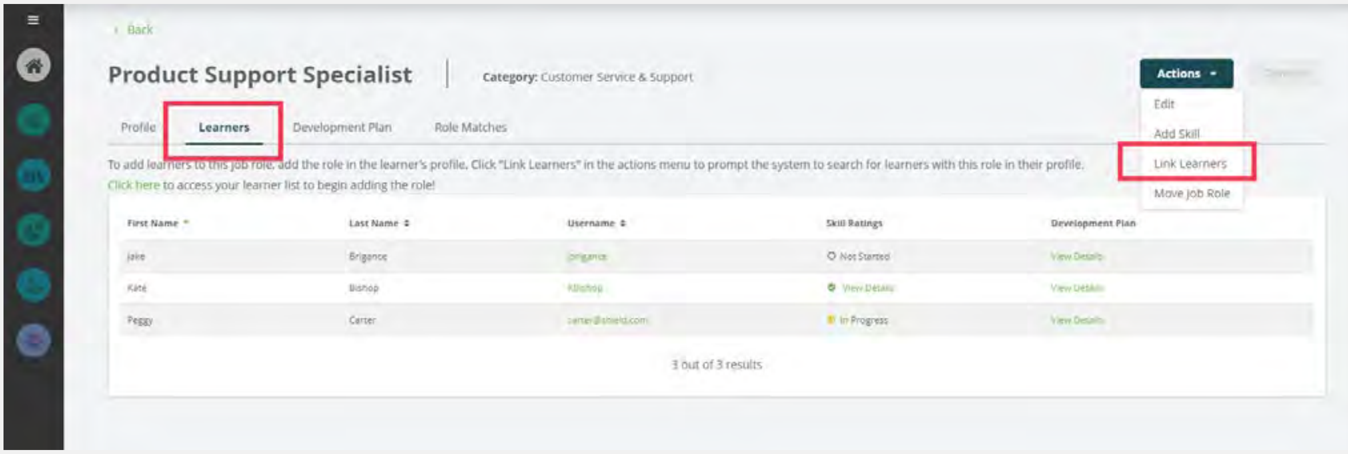
If you would rather update learners' job roles individually, go to a learner's profile > Actions menu > Edit profile. Add their job role title in the job role field – make sure it's an exact match for the job role title in your Job Role Group. Click the Save Updates button at the bottom.



Linking Learners

Then go to the admin sidebar > Skills Development > Job Roles > click into the role that you just added to the learner's profile.

Go to the Learners tab under the job title > Actions > Link Learners. A pop-up will appear, asking if you're sure > click the Link Learners button.



This action will have the system search all your learner profiles for an exact match of this job role, and link those learners to the job role.

NOTE: If you add job roles to your Job Role Group after updating learners' job roles in their profiles, you'll need to follow this process to manually link learners to the newly added job roles.

At this point, if you want to keep your program informal (no development plans yet) and don't need to customize any of the off-the-shelf job roles or skills, you can skip to **Step 7 – Enabling Ratings.**

Step 3: (Optional)

Customizing Job Roles

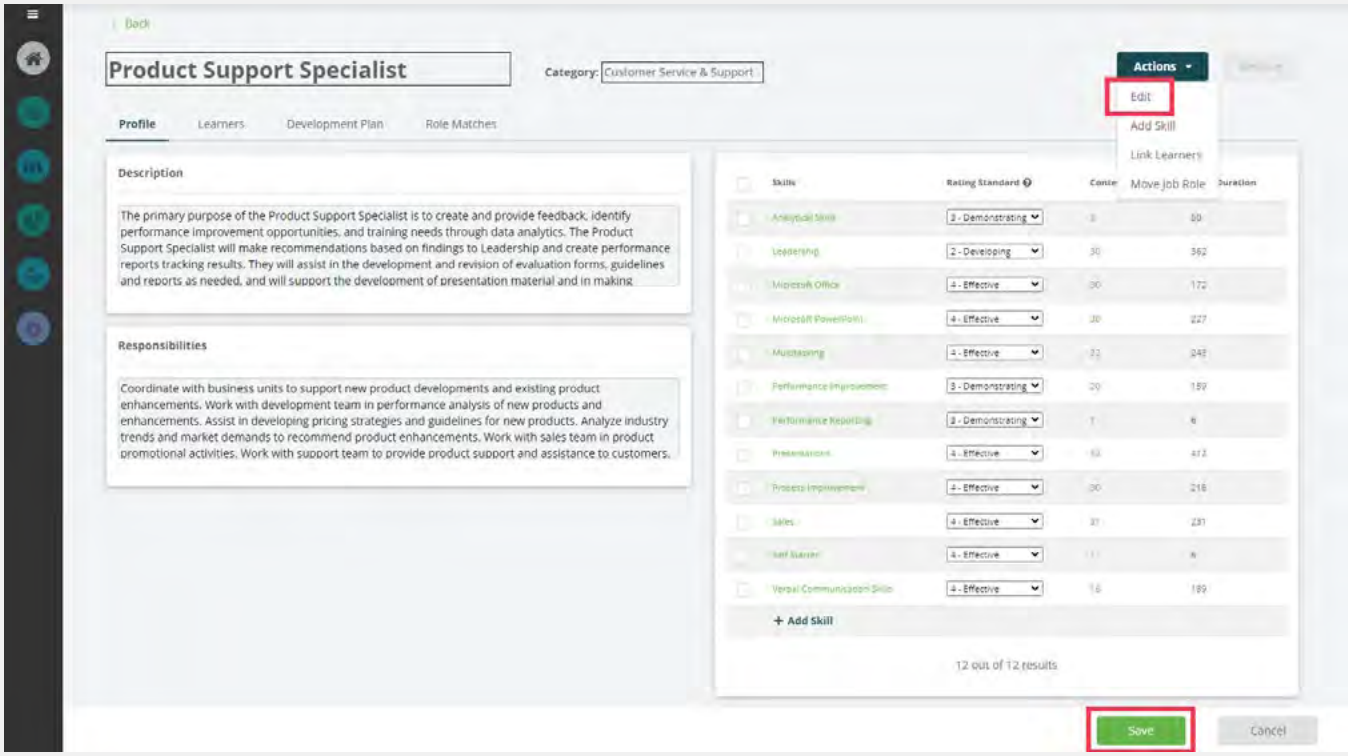
All job roles that you import from BizSkills' off-the-shelf job role library can be customized to better fit your organization's specifications.

To customize a job role, go to your Job Role Group, and click on the job title that you want to customize.

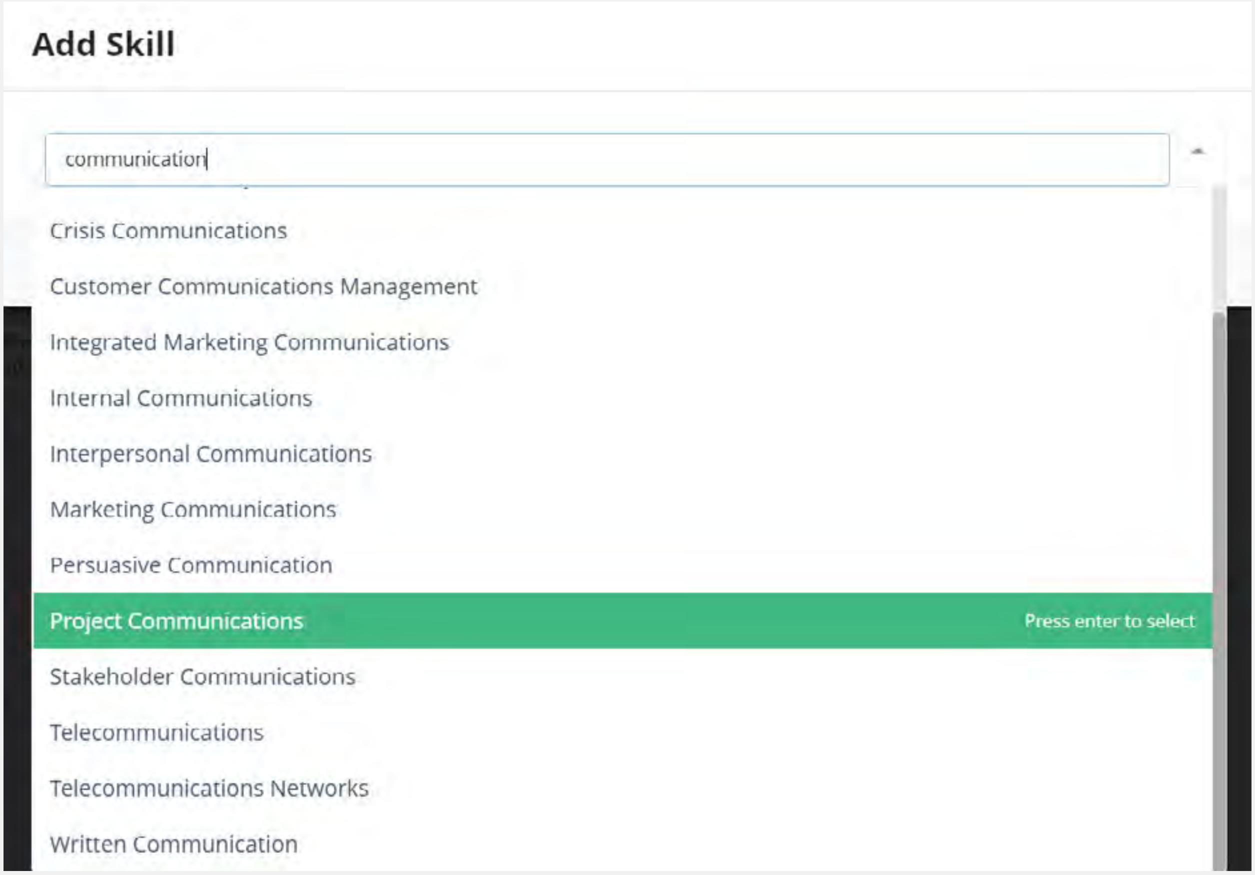
From the job role profile, go to Actions > Edit. This will allow you to edit the job title*, category, description, responsibilities, and rating standards. (Rating standards default to level 4 for all roles and skills.)

***NOTE:** If you have already linked learners to a job role, we do not recommend editing the job role title.

Click the **Save** button to save any changes you've made.



Click Add Skill to select additional skills from the Skills Library. You can select multiple at a time – click Save to add them to the job role profile.



To remove any skills listed on the job role profile, click the check boxes next to them and then click the Remove button in the upper right corner.

NOTE: If you click on a skill within a job role profile, it will open a new tab where you can edit the skill. **Be aware that this will edit the skill for all job roles, not just the job role you were customizing.** The Development Plans section will have more information on customizing a skill specific to a job role.

Step 4: (Optional)

Customizing or Adding Skills

On the admin sidebar, click the Skills Development tab, then Skills Library.

From here, you can customize off-the-shelf skills, add new ones, archive skills irrelevant to your organization, and update the Skills Library to gain new skills and content.

Updating the Skills Library:

Since you have the ability to add or remove content within skills, the Skills Library does not automatically update with new skills and content unless you choose to update it.

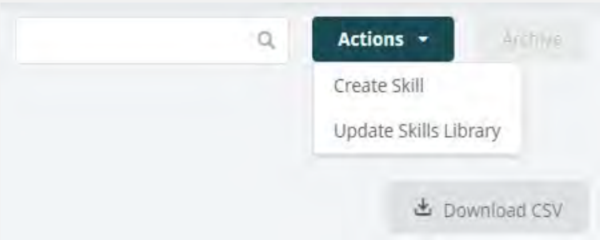
When you update the Skills Library, here's what will happen:

1. Any new skills that have been added to BizSkills will be added to your Skills Library
2. Content that has been retired from The BizLibrary Collection will be removed from skills
3. Any missing content for a skill will be added to it. This includes:
   a. New content that has been added to BizSkills
   b. Any content that you've previously removed from the skill – the system cannot differentiate whether missing content was removed or if it's new content*

*NOTE: If you plan to update the Skills Library regularly to gain new content, we don't recommend removing content from skills, since it will be added back anytime you update the Skills Library.

Any content you've added to a skill will remain on that skill when you update the Skills Library.

To push an update to the Skills Library, go to the admin sidebar > Skills Library > Actions > Update Skills Library.



Customizing Off-the-Shelf Skills:

Use the Search Skills field to find the skill you want and click on the skill title. A new tab will open for the skill profile.

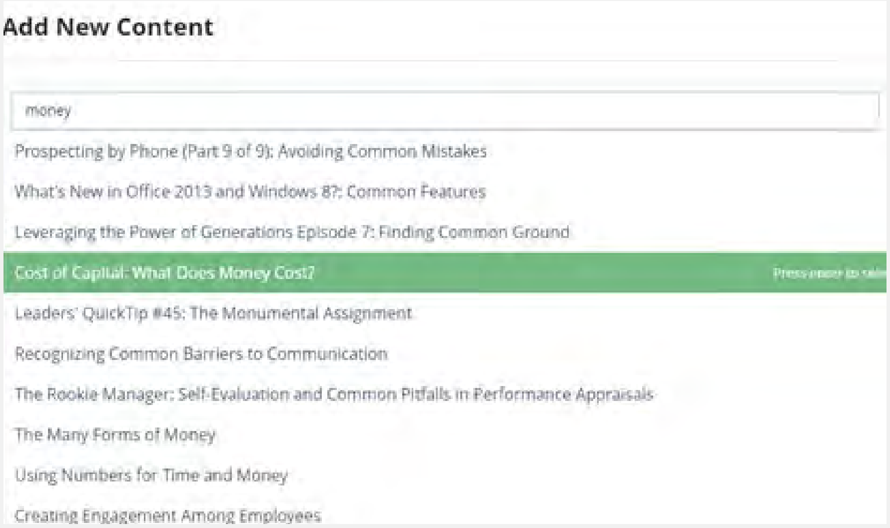
To change the skill name or description, go to Actions > Edit.

NOTE: Keep in mind that if you change the skill name, it will no longer automatically link to job roles it was previously mapped to, and it will not receive content updates if you update the Skills Library.

If you need a skill to have a different name, a better option is to copy the skill. From the skill profile, go to Actions > Edit > Copy and change the name of the copied skill (changing the description is optional). You can then add this skill to any job role.

You can preview the content on the skill profile by clicking the content title.

To add content to the skill profile, go to Actions > Add Content > Search and select content to add. There is no limit to how much content you can add to a skill. Click the Save button.



Customizing or Adding Skills

To remove a content title from the skill profile, click the checkbox and then the Remove button in the upper right corner.

Skills that are copied this way essentially become a custom skill, so they will not receive content updates if you update the Skills Library.

Adding New Skills:

Go to the Skills Library > Actions > Create Skill. Add the skill name and description > click Create.

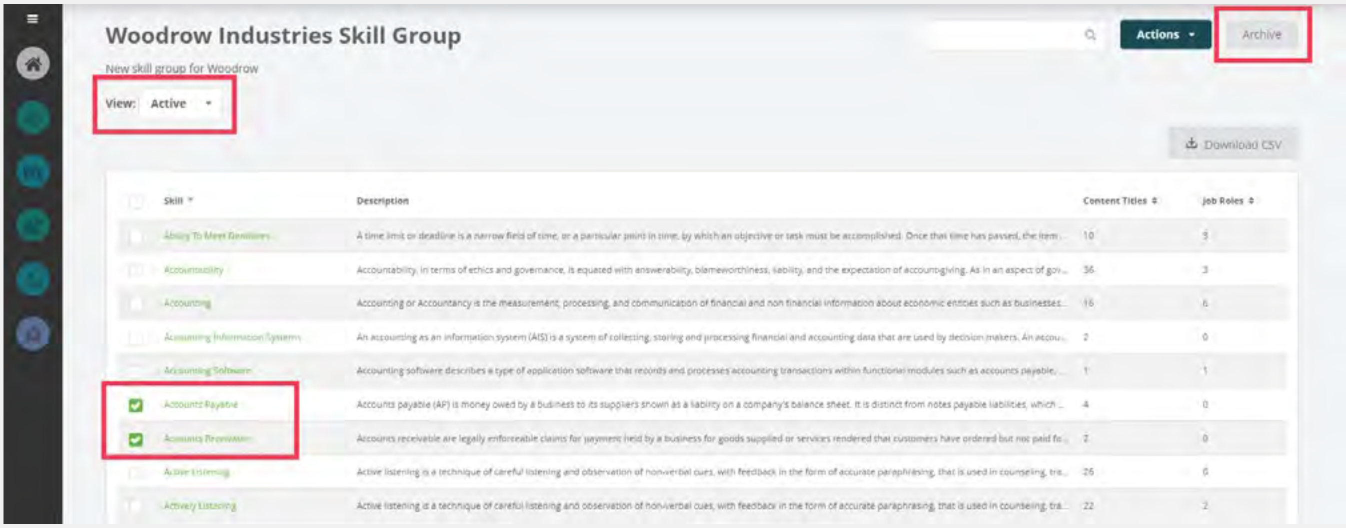
From the new skill profile, go to Actions > Add Content > Search and select content to add to the new skill. There is no limit to how much content you can add to a skill. Click the Save button.

From the skill profile, you can click on a content title to preview it.

Archiving Skills:

If you would like your skills library to only include skills relevant to your organization, you can archive any skill to remove it from the list.

Go to the Skills Library > check the boxes next to any skills you want to archive > click the Archive button in the upper right corner. This does not delete skills, it simply moves them to the Archived list.



If you ever want to change archived skills back to active, change the View dropdown to Archived, check the boxes next to the skills you want, and click the Activate button in the upper right corner.

Step 5: (Optional)

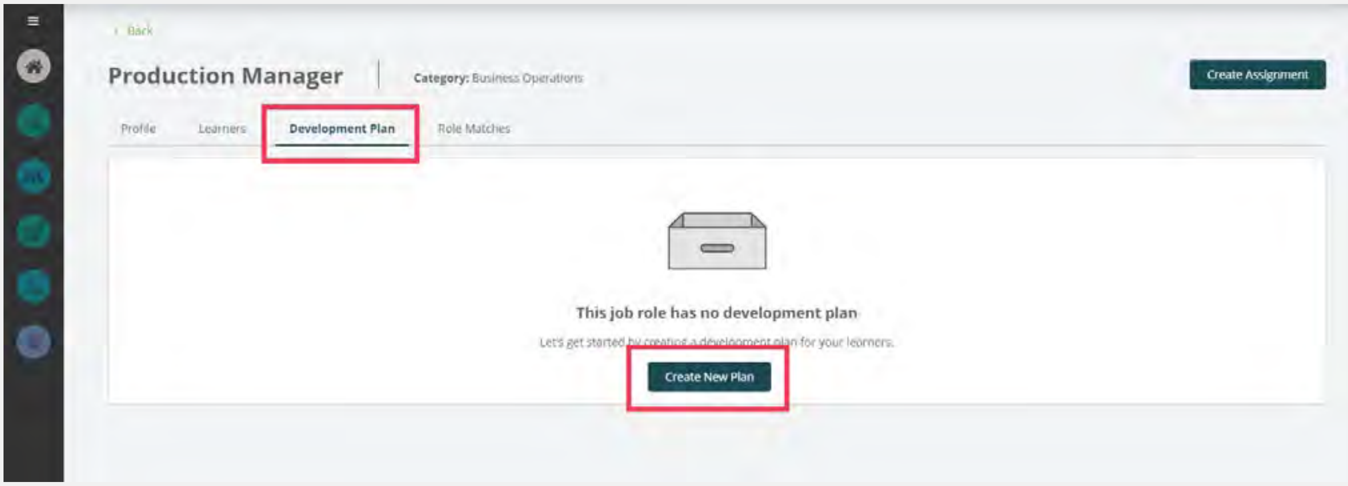
Setting Up Development Plans

If you want to take a more formal approach to using BizSkills, you can set up and assign development plans for learners based on their job role (and/or other attributes). Development plans can factor in each learner's skills ratings, personalizing the plan to their current skillset.

Adding and Customizing Development Plans:

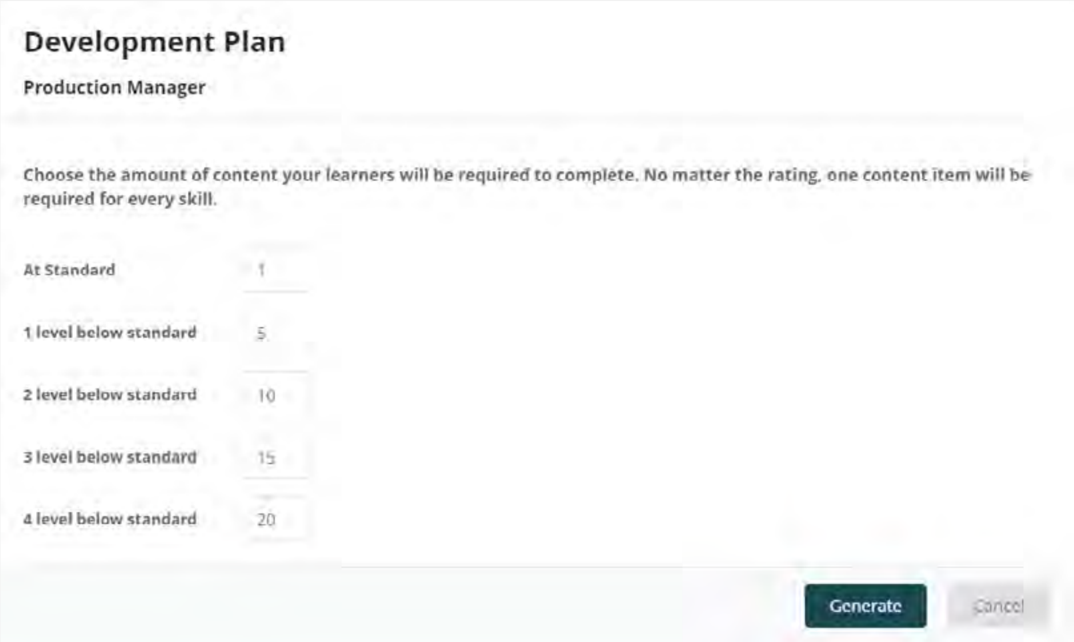
From your Job Role Group, click on a job title to open its job role profile. Then click the Development Plan tab.

Click the Create New Plan button.



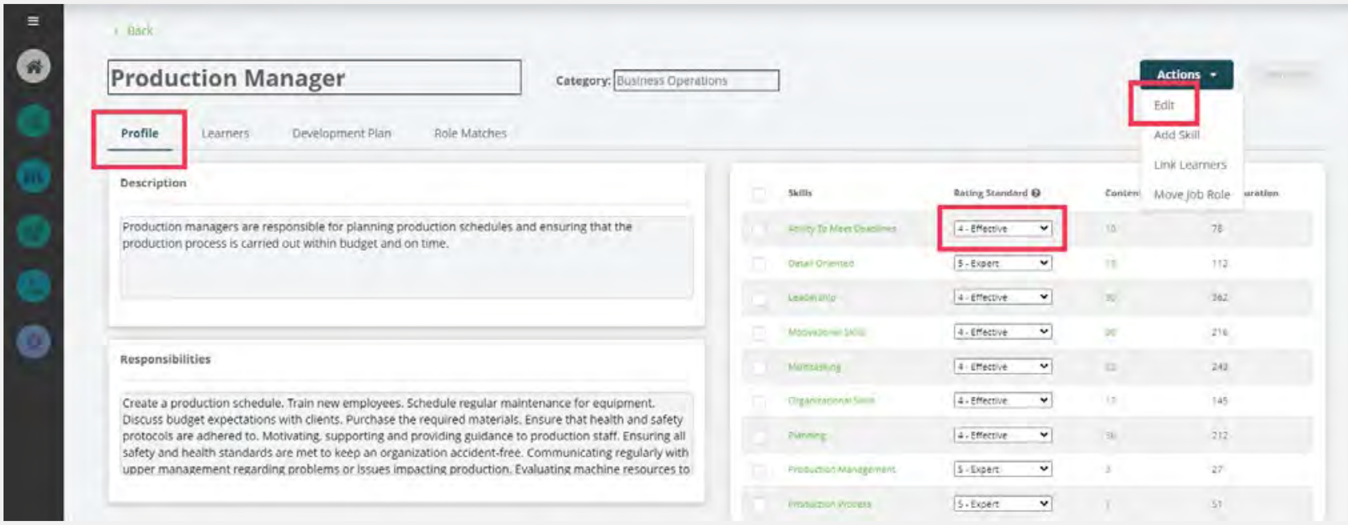
Setting Up Development Plans

A window will open where you can customize the number of content titles a learner will need to take to reach the rating standard for any given skill.



For example, with the default settings shown above, if the rating standard for a skill on this job role is a level 4, and a learner is currently rated at a level 2, they will need to complete 10 content titles to reach level 4.

PRO TIP: Rating standards for each skill are shown on the Profile tab of the job role. They are customizable by going to Actions > Edit.



Click the Generate button when you are done making any adjustments. Your development plan has been created!

Scrolling down to the skills list, you have the option to customize the content that will be included in the plan. Click on a skill title to open the list of mapped content. From here, you can:

- Click on a content title to preview it
- Remove content using the red trash can
- Add content to the plan

NOTE: Adding or removing content here will only affect the skill on this development plan. **It will not impact the content mapped to the skill for any other job roles.**

Assigning Development Plans:

Once you've added a development plan to a job role, you'll need to assign it.

Click the Create Assignment button. A pop-up window will appear to walk you through the assignment steps.

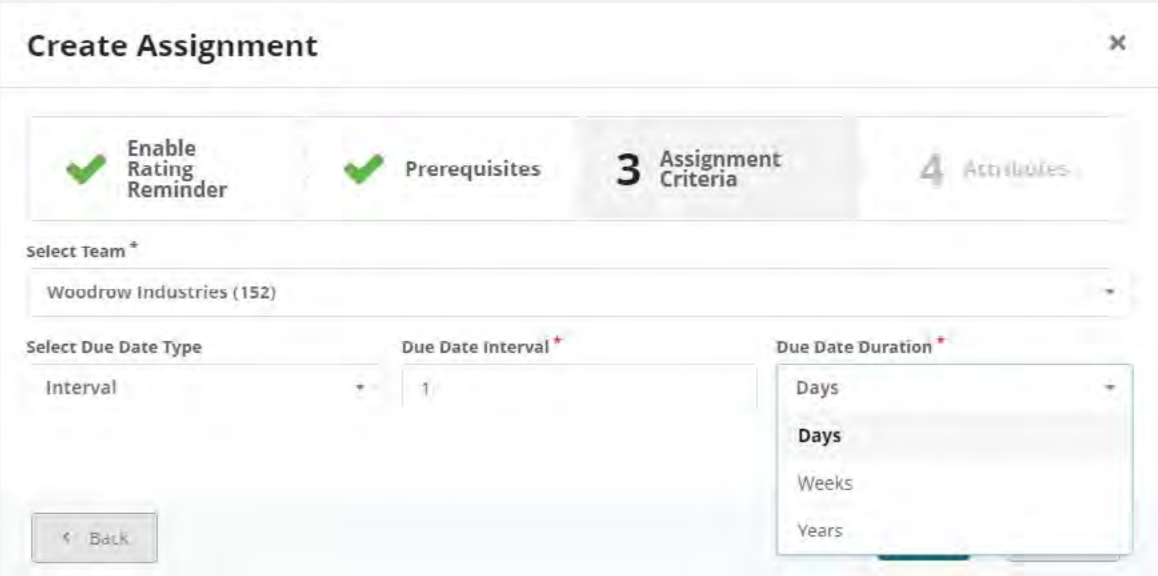
You'll see a reminder that you'll need to enable ratings in order for learners to receive their assigned development plan. We will walk through enabling ratings in the next section of this guide.

Prerequisites lets you decide which ratings you want to require for a learner to take a development plan. Manager and Learner are selected by default, as this is what we recommend using.

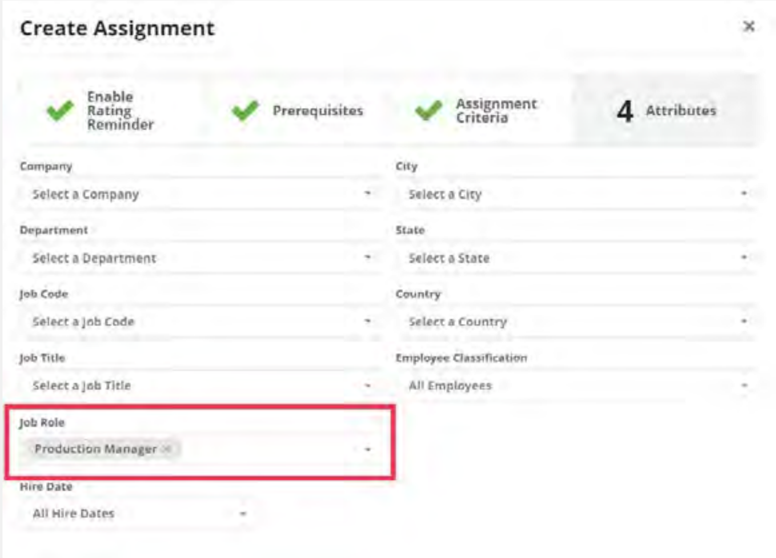
Setting Up Development Plans

Assignment Criteria sets the team and due date rules for this development plan. Select the team that applies for the learners who will be assigned this development plan. Then set the due date rules either with an actual date or an interval (amount of time) to complete the plan by.

NOTE: The interval due date will start once required ratings have been completed for the learner – it does not start when the plan is assigned.



Attributes lets you choose all the attributes that will determine who this development plan is assigned to (within the team that you chose in Step 3). The most common selection here will be the job role that you're working on – selecting other fields are optional. Click the Save button when you're done.



Once an assignment rule is in place, it will display on the Development Plan tab. Multiple assignment rules can be created from this page. Once a rule is in place, it will begin running overnight.

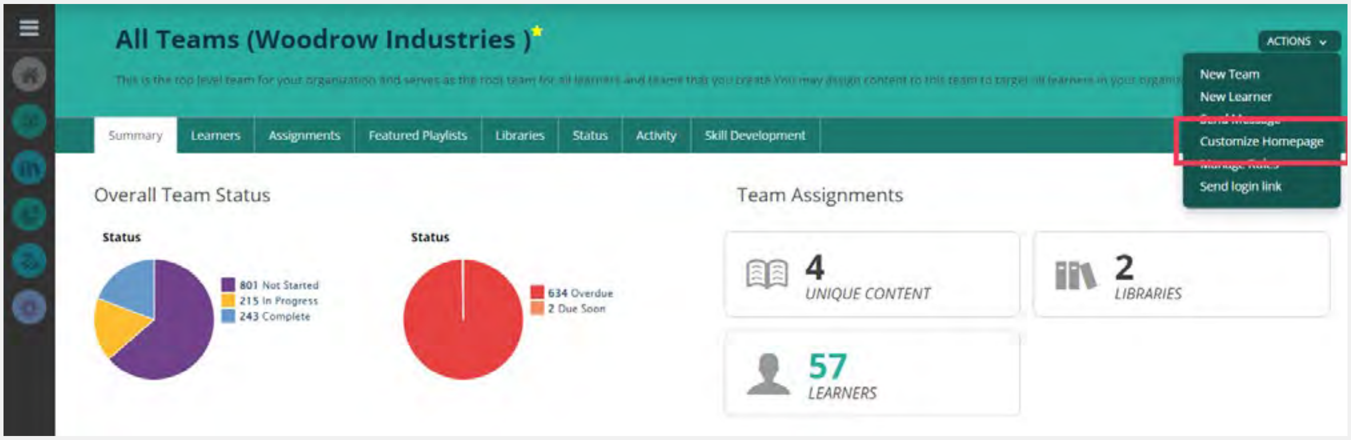
Step 6: (Optional)

Configuring the Learner Homepage

There are 5 widgets that can display information for BizSkills on the learner homepage: My Assignments, Job Role: Focused Skills, Skills Rating Request, Skill Interests, and Featured Skills.

- The **My Assignments** widget will display one item for BizSkills – the Development Plan. If there are any development plans assigned to the learner it will appear on this assignment widget.
- The **Job Role: Focused Skills** widget will display the first several skills alphabetically for the learner's job role. Clicking on a specific skill will take the learner to that skill's list of content.
- The **Skills Rating Request** widget will appear for any supervisor who has ratings to complete or has completed ratings for learners in the past. The supervisor can click on the widget to be taken to their ratings requests page.
- The **Skill Interests** widget functions the same as Focused Skills, except it is for skill interests that a learner has added themselves, rather than skills tied to their current job role. If a learner has never added any skill interests, this widget will not appear for them.
- The **Featured Skills** widget will display each selected skill in its own line, and will display the first several content items within that skill. Clicking on the content item will take the learner to that content profile to view the lesson.

To customize the widgets that will appear on the learner homepage, go to the admin sidebar > People > Teams. From your root-level team, go to Actions > Customize Homepage.

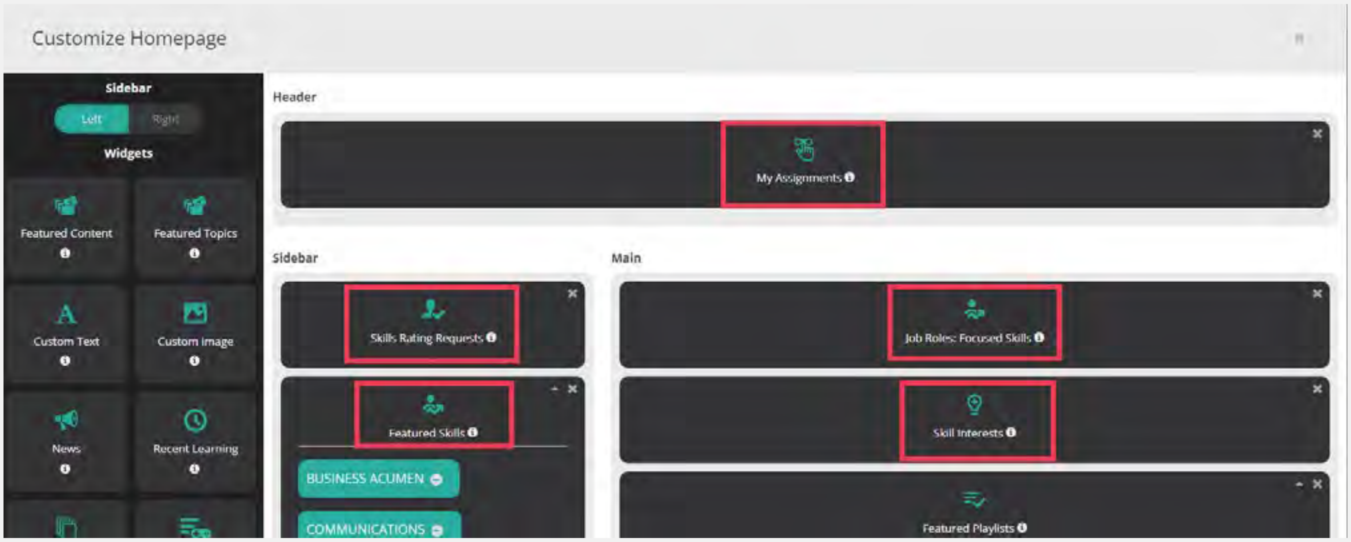


Configuring the Learner Homepage

You can drag and drop the widgets from the black area on the left (titled Widgets) to the designated areas of Header, Sidebar, Main, and Footer.

To remove a widget from the learner view, simply drag it into the black Widgets column. Every item under Widgets in the black area will not be displayed on the homepage.

The Preview option will show the modified custom homepage in a new tab/window. Navigate back to the Team profile tab/window to Save and Publish, Reset to Default, or Close.



Click Save and Publish to push these changes to the learner homepage.

Step 7:

Enabling Ratings

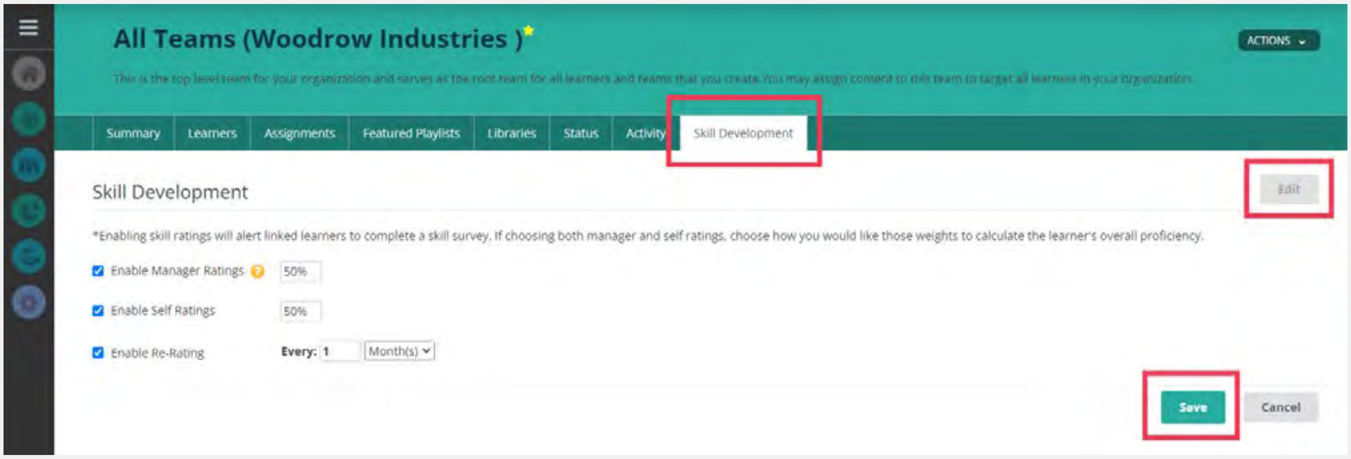
This step is essentially where you will "turn on" the personalization aspects of BizSkills for your learners and automatically notify them that they have ratings to complete.

IMPORTANT!: Before enabling ratings, it's advised that you work with your Client Success Manager to put a launch plan in place, so you can make learners aware of the new Skills Development program. **We recommend waiting to enable ratings until you're ready to send out learner communications immediately afterwards.**

To enable ratings, go to the admin sidebar > People > Teams. Then go to the team profile for the team you are enabling ratings on > click the Edit button.

It is okay to enable ratings for teams where not all learners are part of BizSkills. The ratings will only be sent when learners have a linked job role.

Having a linked job role is what controls everything for BizSkills. Without one, a learner will never know BizSkills exists.



NOTE: It is recommended that whatever settings are chosen are the same for the entire organization, but it is possible to have various settings for different teams.

Enabling Ratings

Select the check boxes to enable Manager Ratings, Self Ratings, or both.

You can also choose if you want to enable Re-Rating. This would allow learners to have their skills re-rated (after a period of time that you choose), to better reflect how their skills change over time.

When you're finished, click the Save button.

Once saved, ratings banners will automatically start appearing for managers/learners to begin rating learners with job roles linked to BizSkills.

What's Next:

In this BizSkills setup guide, we've walked through all the necessary elements for technical implementation of the system. However, we still have plenty to talk about for the strategic side of implementation!

1. Creating a launch plan
    a. Creating a launch plan and initial communications to learners
    b. Should be covered before moving to Step 7 - Enabling Ratings
2. Goals for your skills development program and how to track them
3. How to use the system to meet specific needs not covered in this guide
4. How to encourage learners to drive their own continual skills development with the Skill Interests and Role Matches features
5. Strategies for seeing ongoing utilization of the system

We look forward to seeing what you'll accomplish with BizSkills!