



BizSkills ***Setup Guide***



BIZ
LIBRARY

BizSkills Setup Guide

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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.

Technical Setup Process

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.

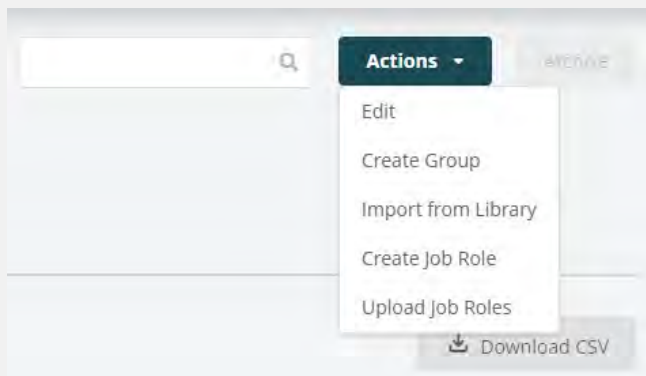
Route C

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

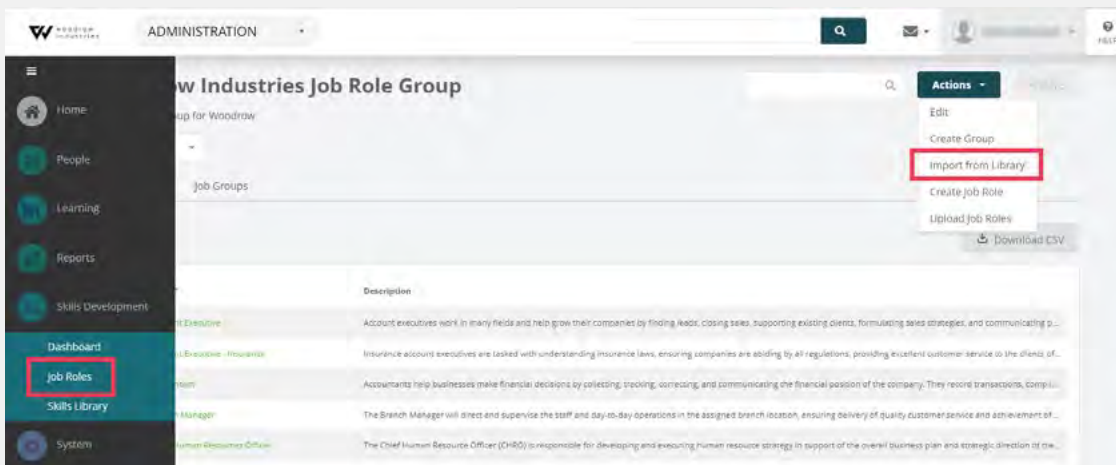
To add job roles to your Job Role Group, you have three options:

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.

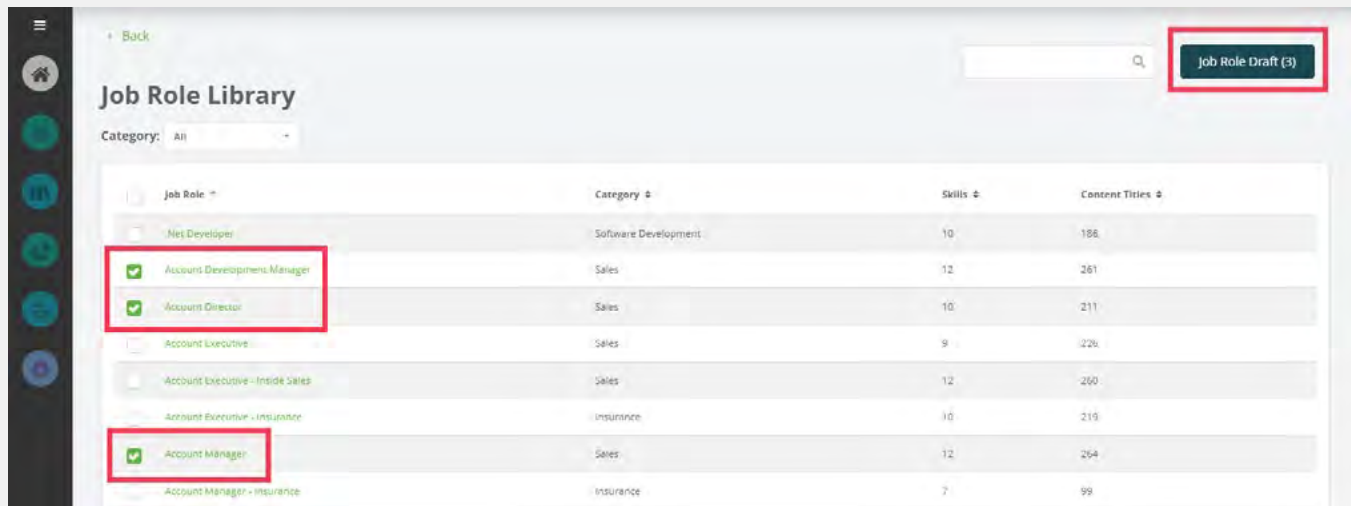


Adding Job Roles

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.**

Adding Job Roles

Product Support Specialist Category: Customer Service & Support

Profile | Learners | Development Plan | Role Matches

Description

The primary purpose of the Product Support Specialist is to create and provide feedback, identify performance improvement opportunities, and training needs through data analytics. The Product Support Specialist will make recommendations based on findings to Leadership and create performance reports tracking results. They will assist in the development and revision of evaluation forms, guidelines and reports as needed, and will support the development of presentation material and in making

Responsibilities

Coordinate with business units to support new product developments and existing product enhancements. Work with development team in performance analysis of new products and enhancements. Assist in developing pricing strategies and guidelines for new products. Analyze industry trends and market demands to recommend product enhancements. Work with sales team in product promotional activities. Work with support team to provide product support and assistance to customers.

Skills	Rating Standard	Conte	Move Job Role	Duration
Analytical Skills	3 - Demonstrating	5		50
Leadership	2 - Developing	30		862
Microsoft Office	4 - Effective	35		172
Microsoft PowerPoint	4 - Effective	30		227
Multitasking	4 - Effective	22		242
Performance Improvement	3 - Demonstrating	20		189
Performance Reporting	3 - Demonstrating	1		6
Presentations	4 - Effective	20		412
Process Improvement	4 - Effective	30		216
Sales	4 - Effective	31		231
Self-Starter	4 - Effective	1		6
Verbal Communication Skills	4 - Effective	16		169

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.

Upload Job Roles

Import File Preparation:

- 1) Download **Import Template**
- 2) Populate your job role content into the template

Upload File

Choose File No file chosen

Job Role Group: Woodrow Industries Job Role Group

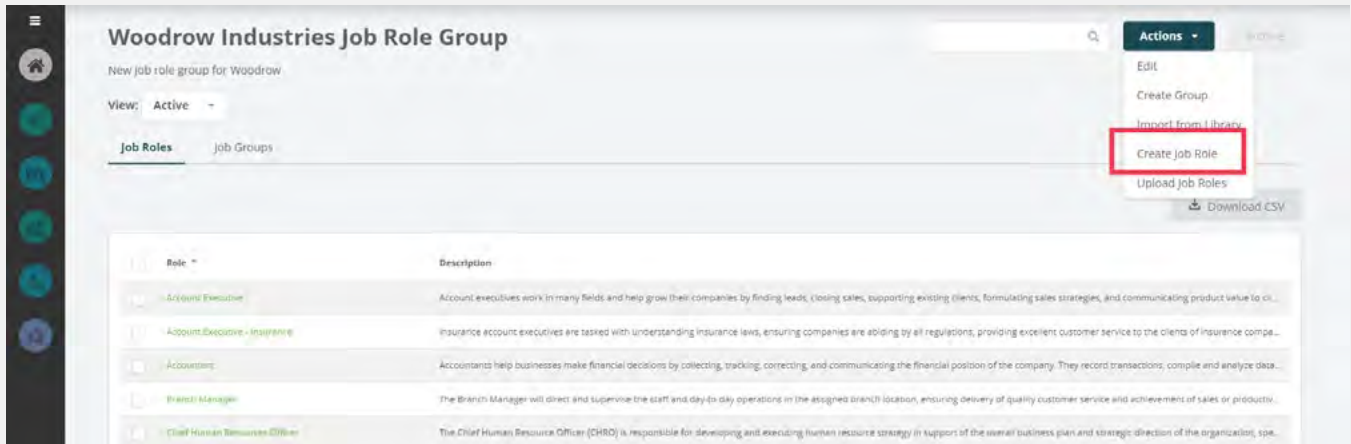
Upload Cancel

Adding Job Roles

Creating Custom Job Roles:

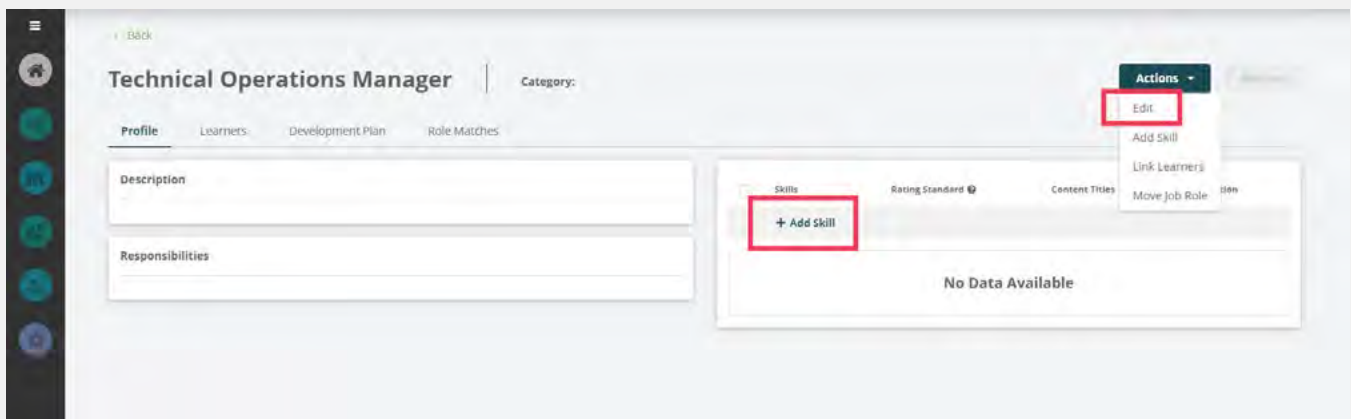
You can also create custom job roles one at a time.

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

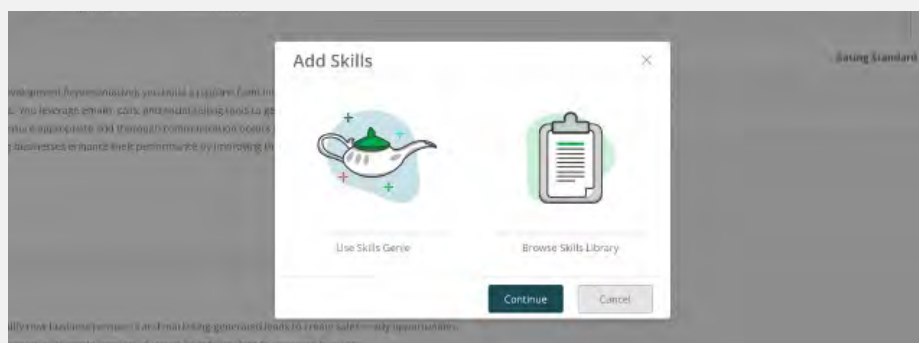


Enter a unique job role title (description is optional) and click Create. The new job role profile page will open.

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.

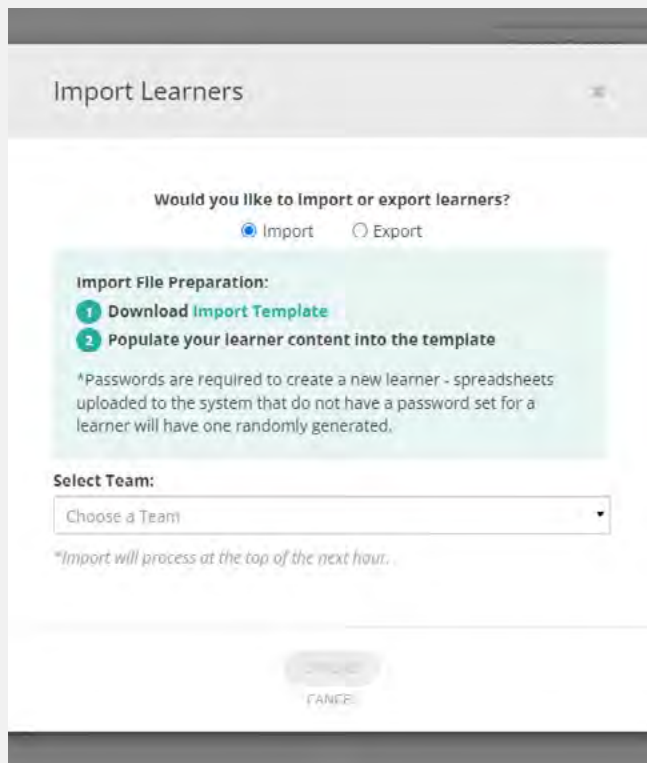
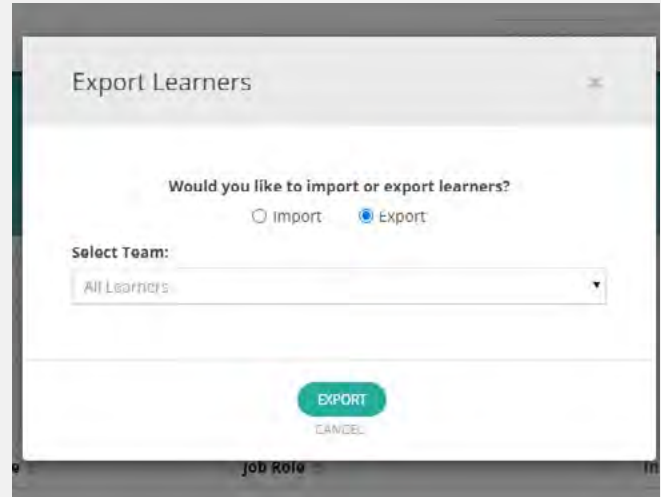
The screenshot displays the 'Learners' management page. On the left is a dark sidebar with navigation items: HOME, PEOPLE, Teams, Learners (highlighted with a red box), Approval Agents, LEARNING, REPORTS, SKILLS DEVELOPMENT, and SYSTEM. The main content area has a teal header with 'Import / Export Learners' (highlighted with a red box) and '+ New Learner'. Below the header is a search bar and a '+ FILTER' button. A table lists learner profiles with columns for Last Name, Username, Job Role, Instructor, and Supervisor. Each row includes a 'VIEW PROFILE' button and a plus sign for additional actions.

Last Name	Username	Job Role	Instructor	Supervisor	
Bailey	wbailey@westwing.com		—	—	VIEW PROFILE +
Bartlet	jbartlet@westwing.com	Product Manager	—	✓	VIEW PROFILE +
Bartlett	abartlett@westwing.com		✓	—	VIEW PROFILE +
Biegler	pbiegler		—	—	VIEW PROFILE +
Bishop	Brittani.Wayne		✓	✓	VIEW PROFILE +

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.

Linking Learners

Kate Bishop

Username: kbishop
Title:
Cost Center:
Division:
Company:
Department:
Supervisor: Hannah Hamilton
Hire Date:
Job Role: Product Support Specialist

Phone:
Email: kbishop@shield.com
Employee ID:
Instructor: No
City:
State:
Country: United States
Learner Status: Active

Teams | Assignments | Libraries | Status | Activity | Privileges

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.

Edit Learner Profile

Back to profile

First Name: Kate
Last Name: Bishop
Username: KBishop

Email: kbishop@shield.com
Phone: Phone Number
Address: Address

City: City
State: State
Postal Code: Postal Code

Country: United States

Company: Company
Department: Department
Title: Title

Job Code: Job Code
Supervisor: Hannah Hamilton
Hire Date: Hire Date

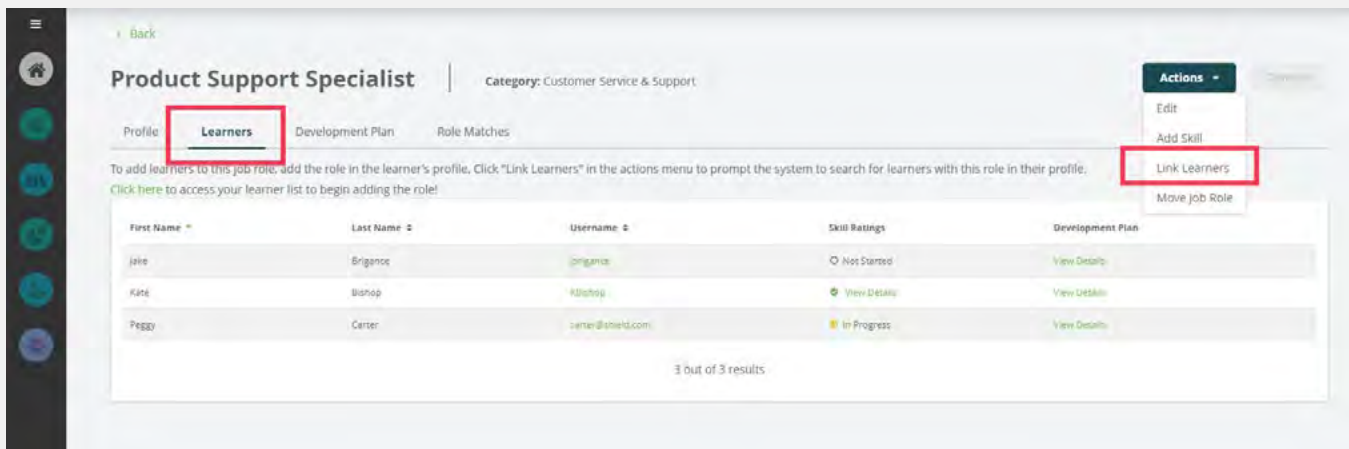
Employee Id: Employee Id
Job Role: Product Support Specialist
Division: Division

Cost Center:

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.

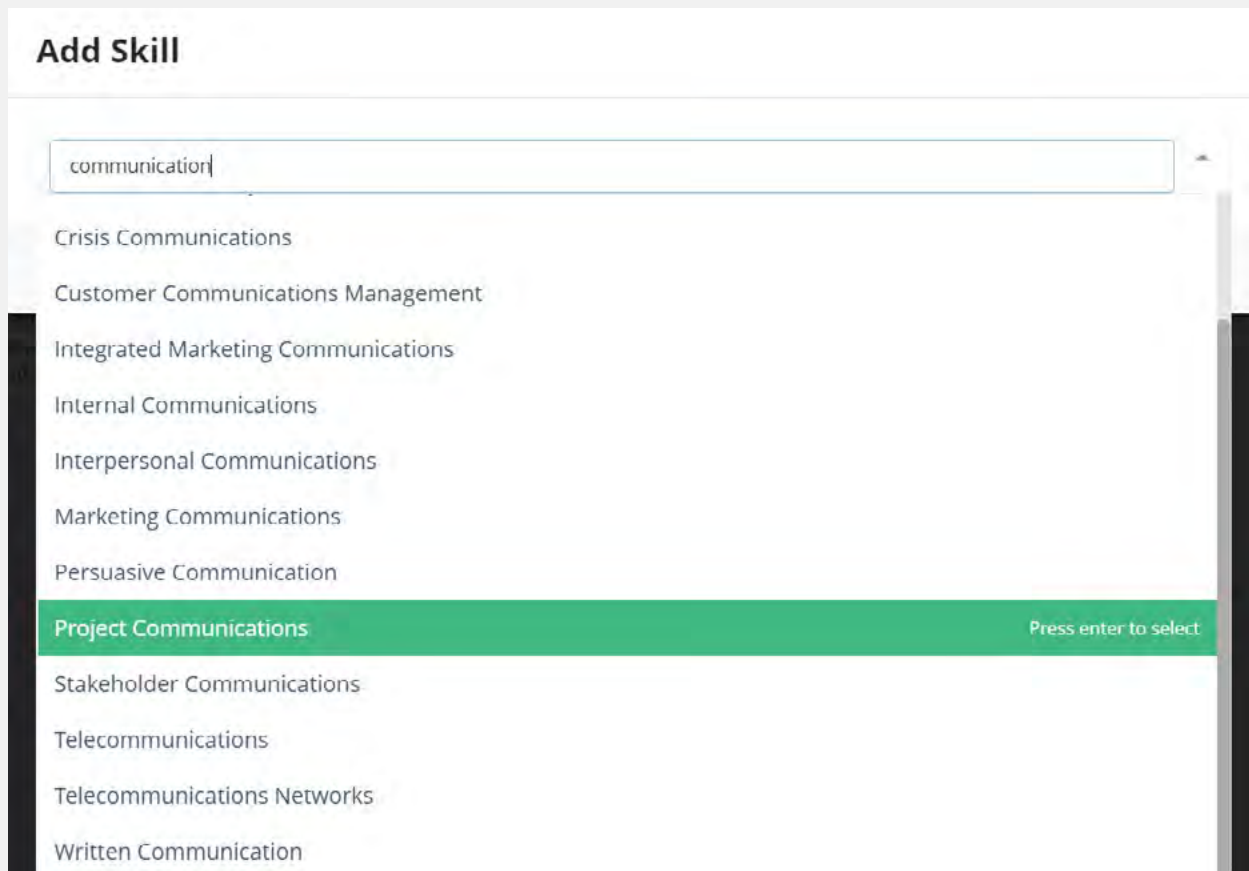
Click the **Save** button to save any changes you've made.

The screenshot displays the 'Product Support Specialist' job role profile. The 'Actions' menu is open, showing options: Edit, Add Skill, and Link Learners. The 'Edit' option is highlighted with a red box. The 'Save' button at the bottom right is also highlighted with a red box.

Skills	Rating standard	Count	Move Job Role	Duration
Analytical Skills	3 - Demonstrating	0		00
Leadership	2 - Developing	30		362
Microsoft Office	4 - Effective	00		172
Microsoft PowerPoint	4 - Effective	30		227
Multitasking	4 - Effective	31		243
Performance Improvement	3 - Demonstrating	20		189
Performance Reporting	2 - Demonstrating	1		6
Presentation	4 - Effective	63		412
Process Improvement	4 - Effective	00		216
Sales	4 - Effective	31		231
Self-Starters	4 - Effective	11		6
Verbal Communication Skill	4 - Effective	16		189

Customizing Job Roles

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.



The screenshot shows a web interface titled "Add Skill". At the top, there is a search input field containing the text "communication". Below the search bar is a list of skills from a library. The skills listed are: Crisis Communications, Customer Communications Management, Integrated Marketing Communications, Internal Communications, Interpersonal Communications, Marketing Communications, Persuasive Communication, Project Communications, Stakeholder Communications, Telecommunications, Telecommunications Networks, and Written Communication. The "Project Communications" skill is highlighted with a green background. To the right of this highlighted item, the text "Press enter to select" is visible.

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.

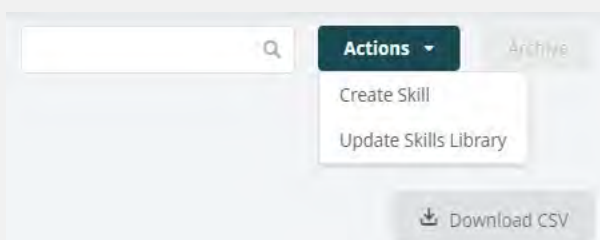
When you update the Skills Library, here's what will happen:

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 or Adding Skills

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.

Edit Skill

Skill Name ?

Analytical

Description

Analytical... tion into smaller categories in order to draw conclusions. Analytical sk

Save Cancel

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.

Add New Content

money

Prospecting by Phone (Part 9 of 9): Avoiding Common Mistakes

What's New in Office 2013 and Windows 8?: Common Features

Leveraging the Power of Generations Episode 7: Finding Common Ground

Cost of Capital: What Does Money Cost? Press enter to view

Leaders' QuickTip #45: The Monumental Assignment

Recognizing Common Barriers to Communication

The Rookie Manager: Self-Evaluation and Common Pitfalls in Performance Appraisals

The Many Forms of Money

Using Numbers for Time and Money

Creating Engagement Among Employees

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.

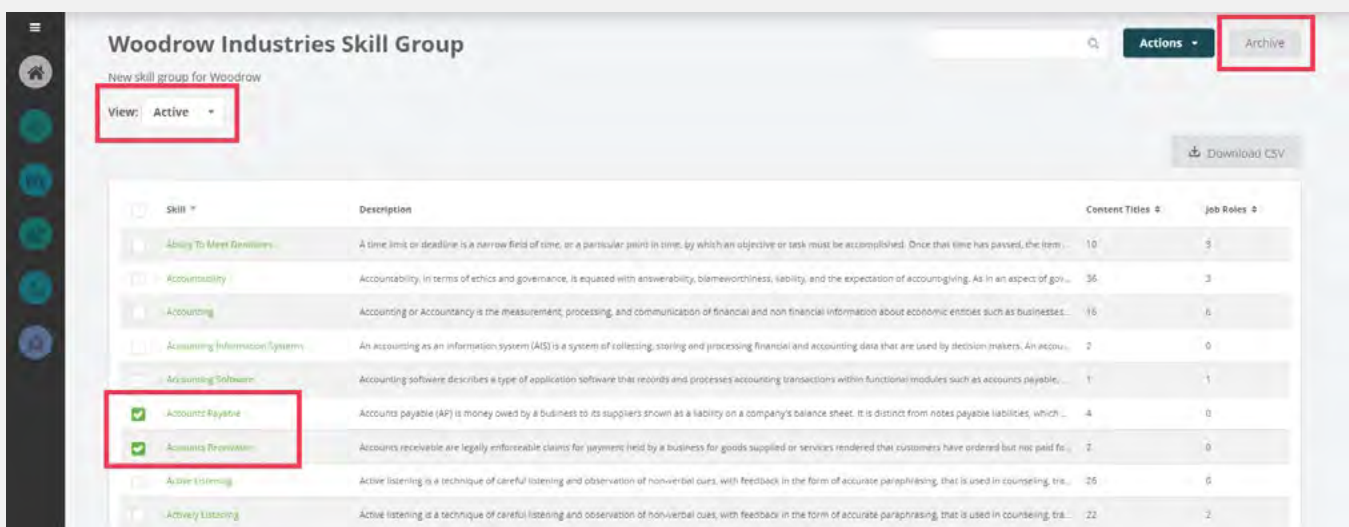
From the new skill profile, go to Actions > Add Content > Search and select content to add to the new skill. There is no limit to how much content you can add to a skill. Click the Save button.

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.



The screenshot shows the 'Woodrow Industries Skill Group' interface. At the top right, there is a search bar, an 'Actions' dropdown menu, and an 'Archive' button. Below the search bar, there is a 'View: Active' dropdown menu. The main content area displays a table of skills with columns for Skill, Description, Content Titles, and Job Roles. The 'Accounts Payable' and 'Accounts Receivable' skills are highlighted with red boxes, and their checkboxes are checked. The 'Archive' button is also highlighted with a red box.

Skill	Description	Content Titles	Job Roles
Ability To Meet Deadlines	A time limit or deadline is a narrow field of time, or a particular point in time, by which an objective or task must be accomplished. Once that time has passed, the tem...	10	3
Accountability	Accountability, in terms of ethics and governance, is equated with answerability, blameworthiness, liability, and the expectation of accounting. As in an aspect of gov...	36	3
Accounting	Accounting or Accountancy is the measurement, processing, and communication of financial and non financial information about economic entities such as business...	16	6
Accounting Information Systems	An accounting as an information system (AIS) is a system of collecting, storing and processing financial and accounting data that are used by decision makers. An accou...	2	0
Accounting Software	Accounting software describes a type of application software that records and processes accounting transactions within functional modules such as accounts payable...	1	1
Accounts Payable	Accounts payable (AP) is money owed by a business to its suppliers shown as a liability on a company's balance sheet. It is distinct from notes payable liabilities, which...	4	0
Accounts Receivable	Accounts receivable are legally enforceable claims for payment held by a business for goods supplied or services rendered that customers have ordered but not paid fo...	7	0
Active Listening	Active listening is a technique of careful listening and observation of non-verbal cues, with feedback in the form of accurate paraphrasing, that is used in counseling, tra...	26	6
Active Listening	Active listening is a technique of careful listening and observation of non-verbal cues, with feedback in the form of accurate paraphrasing, that is used in counseling, tra...	22	2

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)

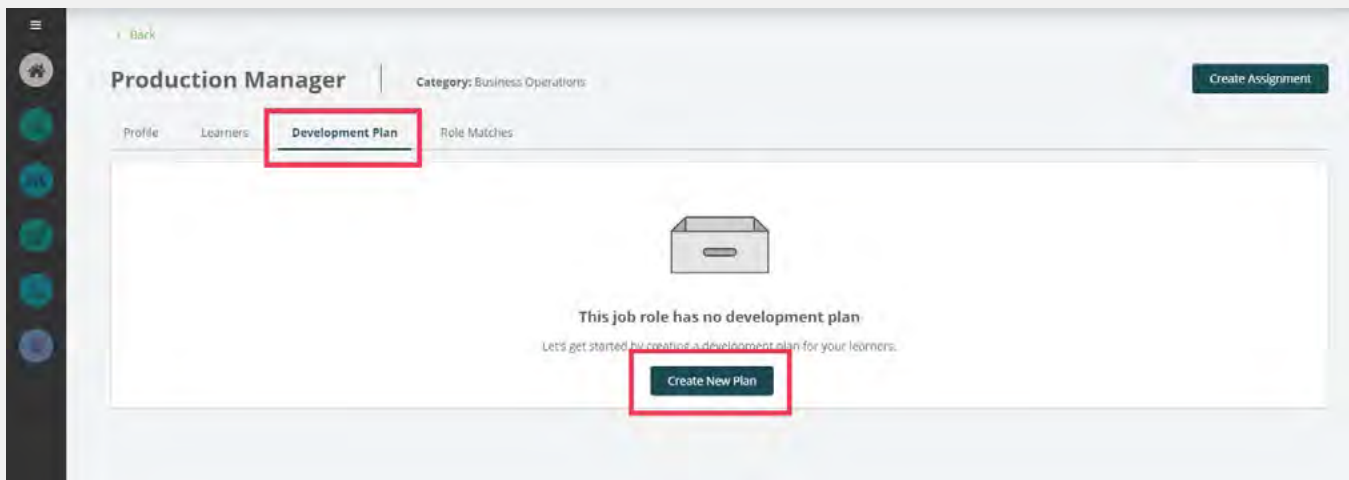
Setting Up Development Plans

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.

Development Plan
Production Manager

Choose the amount of content your learners will be required to complete. No matter the rating, one content item will be required for every skill.

At Standard	1
1 level below standard	5
2 level below standard	10
3 level below standard	15
4 level below standard	20

[Generate](#) [Cancel](#)

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.

Production Manager Category: Business Operations

Profile | Learners | Development Plan | Role Matches

Description
Production managers are responsible for planning production schedules and ensuring that the production process is carried out within budget and on time.

Responsibilities
Create a production schedule. Train new employees. Schedule regular maintenance for equipment. Discuss budget expectations with clients. Purchase the required materials. Ensure that health and safety protocols are adhered to. Motivating, supporting and providing guidance to production staff. Ensuring all safety and health standards are met to keep an organization accident-free. Communicating regularly with upper management regarding problems or issues impacting production. Evaluating machine resources to

Skills	Rating Standard	Content	Duration
Ability To Meet Deadlines	4 - Effective	10	78
Detail Oriented	5 - Expert	18	112
Leadership	4 - Effective	30	362
Motivational Skills	4 - Effective	30	216
Messaging	4 - Effective	22	243
Organizational Skills	4 - Effective	17	145
Planning	4 - Effective	38	212
Production Management	5 - Expert	3	27
Production Process	5 - Expert	1	51

Actions
Edit
Add Skill
Link Learners
Move Job Role

Setting Up Development Plans

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.

The screenshot shows the 'Create Assignment' form with the 'Assignment Criteria' step selected. The progress bar at the top indicates: 'Enable Rating Reminder' (checked), 'Prerequisites' (checked), '3 Assignment Criteria' (selected), and '4 Attributes' (pending). Below the progress bar, the 'Select Team' dropdown is set to 'Woodrow Industries (152)'. The 'Select Due Date Type' dropdown is set to 'Interval'. The 'Due Date Interval' is set to '1'. The 'Due Date Duration' dropdown is open, showing options: 'Days', 'Days', 'Weeks', and 'Years'. A 'Back' button is visible at the bottom left.

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.

The screenshot shows the 'Create Assignment' form with the 'Attributes' step selected. The progress bar at the top indicates: 'Enable Rating Reminder' (checked), 'Prerequisites' (checked), 'Assignment Criteria' (checked), and '4 Attributes' (selected). Below the progress bar, there are several dropdown menus for selecting attributes: 'Company' (Select a Company), 'City' (Select a City), 'Department' (Select a Department), 'State' (Select a State), 'Job Code' (Select a Job Code), 'Country' (Select a Country), 'Job Title' (Select a Job Title), 'Employee Classification' (All Employees), 'Job Role' (Production Manager), and 'Hire Date' (All Hire Dates). The 'Job Role' dropdown is highlighted with a red box.

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.

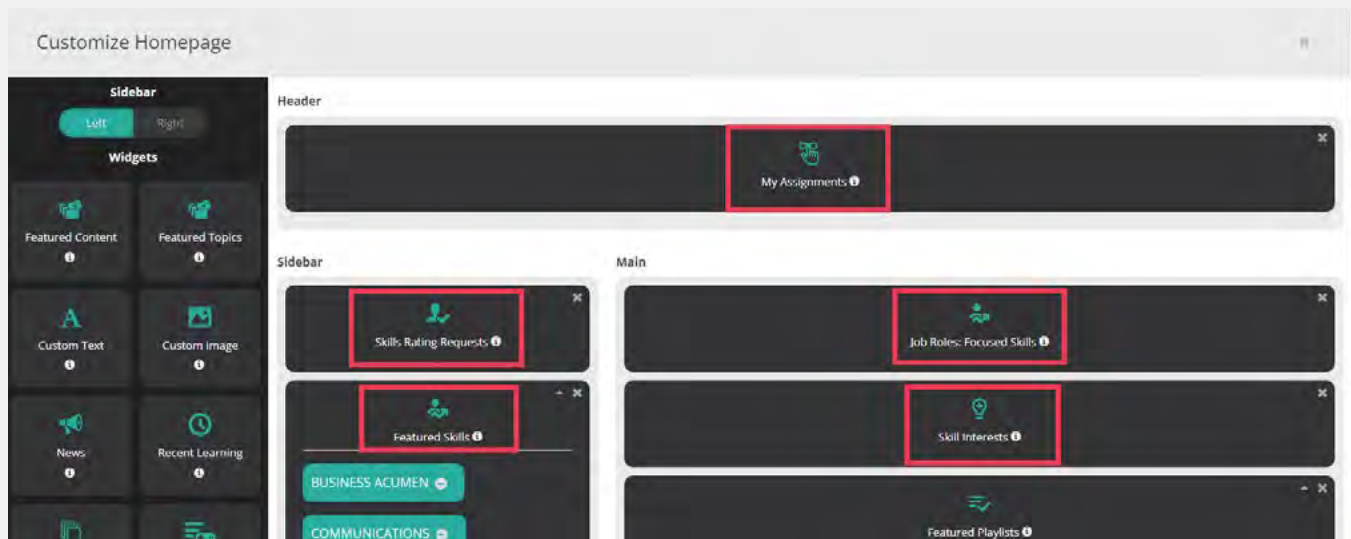
The screenshot shows the BizSkills admin interface for 'All Teams (Woodrow Industries)'. The page includes a navigation bar with tabs for Summary, Learners, Assignments, Featured Playlists, Libraries, Status, Activity, and Skill Development. The 'Summary' tab is active, displaying 'Overall Team Status' and 'Team Assignments'. The 'Overall Team Status' section contains two pie charts: one for 'Status' (801 Not Started, 215 In Progress, 243 Complete) and one for 'Status' (634 Overdue, 2 Due Soon). The 'Team Assignments' section shows 4 UNIQUE CONTENT, 2 LIBRARIES, and 57 LEARNERS. The 'Actions' dropdown menu is open, and 'Customize Homepage' is highlighted with a red box.

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.

The screenshot shows the 'All Teams (Woodrow Industries)' interface. The top navigation bar includes tabs for Summary, Learners, Assignments, Featured Playlists, Libraries, Status, Activity, and Skill Development. The 'Skill Development' tab is highlighted. Below the tabs, there is a section for 'Skill Development' with an 'Edit' button. The settings for 'Skill Development' are as follows:

- *Enabling skill ratings will alert linked learners to complete a skill survey. If choosing both manager and self ratings, choose how you would like those weights to calculate the learner's overall proficiency.
- Enable Manager Ratings (50%)
- Enable Self Ratings (50%)
- Enable Re-Rating (Every: 1 Month(s))

The 'Save' button is highlighted in the bottom right corner.

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