# Table of Contents

1 Welcome ........................................................................................................................................... 4
2 Account Set Up .................................................................................................................................. 4
   Single Sign On (SSO) ......................................................................................................................... 5
   2.1 Obtaining System Administrator Rights ..................................................................................... 5
3 Managing User Administration ........................................................................................................... 6
   3.1 Search Users Pod .......................................................................................................................... 6
   3.2 Users Pod ...................................................................................................................................... 8
   3.3 Email Invitations & Notifications Pod .......................................................................................... 9
4 Managing Group Administration ......................................................................................................... 12
   4.1 Sending Email Invitations & Reminders ...................................................................................... 15
   4.2 Viewing Assessment Data ........................................................................................................... 15
   4.3 Modifying Assessment Statuses ................................................................................................... 15
   4.4 Managing Job Roles .................................................................................................................... 15
   4.5 Managing Target Proficiency Levels ............................................................................................ 16
5 Accessing IT Skill Builder Dashboard Reports ................................................................................... 16
6 The Resource Guide ............................................................................................................................... 19
   6.1 Accessing the Guide .................................................................................................................... 20
   6.2 Modifying the Guide .................................................................................................................... 20
7 My Career Journey ............................................................................................................................... 21
1 WELCOME

IT Skill Builder is a platform for information technology employee professional development. IT Skill Builder helps an organization, and their people, to develop the core skills necessary to become high-performing leaders enabling them to movie up the IT Maturity Curve. Employees take a self-assessment of their skills. Their manager then assesses these same skills for each direct report. The system then compares your responses and your managers responses against standards in the industry based on common job roles expectations for core competencies. Employees can identify individual strengths and areas for improvement, view targeted recommendations, and using this powerful information, build an individual development plan to help grow relevant IT skills. You can view and track development plan progress helping drive more meaningful discussions between employees and managers.

As a System Administrator of IT Skill Builder you will have the unique ability to run usage reports, manage user accounts, email your user community and more!

We hope you enjoy this journey!

2 ACCOUNT SET UP

Creating an IT Skill Builder account is easy. Most organizations will integrate a single-sign on (SSO) capability to bypass the full registration process and to streamline username and password maintenance. This is the custom method. Other organizations allow the users to create and maintain their password information directly within IT Skill Builder. We will refer to this as the traditional method. Your System Administrator will provide with the specific configuration for your organization.

When you access the site you as a TRADITIONAL USERS (non SSO) will be presented with the following login screen:

To register for an IT Skill Builder account:

1. Access IT Skill Builder via https://www.itskillbuilderassessment.com
2. Click on the First time? Click to Register link which can be found just below the UserName and Password fields
3. On the Register Here page, enter the PIN supplied by your site administrator in the PIN field.
4. In the Email field enter in your work-related email address as this is how the system will identify you
5. Enter in your First Name and Last Name in the respective fields
6. When complete, select Continue.
7. Create a password for IT Skill Builder and confirm
8. “Select your Job” by clicking the job role that most accurately describes your current role*
9. Select Update Preferences.
**SINGLE SIGN ON (SSO)** users will be provided with a unique URL to access IT Skill Builder. This link will work when you are logged into your network. The registration process for SSO clients is condensed and simply directs the user to a modified Preferences page, similar to what you see below:

1. In the **Email** field enter in your work-related email address as this is how the system will identify you.
2. Enter in your First Name and Last Name in the respective fields.
3. When complete, select **Continue**.
4. Create a password for IT Skill Builder and confirm.
5. “Select your Job” by clicking the job role that most accurately describes your current role.*
6. Select **Update Preferences**.

When complete you will be presented with the IT Skill Builder landing Page. Here you will be able to complete your **Self-Assessment**, view your personal **Development Plan**, access the **Resource Guide** and view **Direct Reports** if you are a people manager (within IT Skill Builder) buttons.

*Please note, if your specific job title doesn’t exist your company most likely did a mapping exercise relating company specific job roles to IT Skill Builder’s standard job roles.

### 2.1 Obtaining System Administrator Rights

System Administrator rights are managed through the IT Skill Builder support team. The Support team can be contacted via our online Support Center available [here](#) or by email at [support@ouellette-online.com](mailto:support@ouellette-online.com).
3 MANAGING USER ADMINISTRATION

To access the User Administration submenu first select the Command Post tab. From within this screen the System Administrator has the ability to search for existing users, modify a user account, edit default email templates, and administer email notification setting for your user community.

3.1 SEARCH USERS POD

The Search Users pod allows the System Administrator to manage all of the IT Skill Builder accounts.

To search for a user:

1. Enter in the first three letters of the user’s first and last name (3, 3) or simply enter in the user’s email address.
2. Next, select Search Users. A list of users will return based on the search criteria entered. From within this screen you will be able to see the following information:
   - First Name
   - Last Name
   - Email Address
   - Account Status
   - Associated Content Model
By clicking on “view” the System Administrator will be able to:

- Update the user’s email address (unless an Active Directory integration is in place)
- Determine who is assigned as the user’s (IT Skill Builder) manager
- Change the user’s manager (in IT Skill Builder)
- Modify the user’s password
- Deactivate or reactive the account:

To update the user’s email address Select “view”

1. Select edit
2. Update the Email field as appropriate
3. Select Save

Please note if you have an Active Directory Federated Services integration you will not be able to make manual updates to this field.

To determine who is assigned as the user’s (IT Skill Builder) manager:

1. Select view
To modify a user’s Manager:

1. Select view
2. Select edit
3. Review the Manager Email address or,
4. Select Change Manager
5. Enter in the New Manager Email address in the respective field
6. Select Search
7. Select Remove previous manager assessment if you would like the new manager to view this managers assessment on the Employee
8. Select Confirm
9. Select Save

To modify the user’s password:

1. Select view
2. Select edit
3. Select Change Password
4. Enter in the New Password and Retype...
5. Select Submit
6. Select Save
7. Notify the client to reset their password to a more secure password via the Preferences menu

To deactivate or reactive the account:

1. Select view
2. Select edit
3. Check Active User? to reactivate this user’s IT Skill Builder account or,
4. Uncheck Active User? to deactivate this user’s IT Skill Builder account
5. Select Save

3.2 USERS POD

From with the Users pod the System Administrator has the ability to:

- Add a non-Survey User
- Upload Registration Information

The Add Non-Survey User functionality allows a System Administrator to provide a user with access to the Development Plan and Resource Guide capabilities. A “non-Survey User” will not have the ability to take advantage of the Assessment or Skill Profile capabilities.

To add a non-survey user:
1. **Select Add Non Survey User**
2. Enter in the user account information including First Name, Last Name, Email and Manager Email
3. Validate **Active User?** is checked
4. Select **Add**

The **Upload Registration** feature allows the Administrator the ability to upload a tab delimited file, typically from a HR information system, preloading user account information, and expediting the registration process. This file typically includes a mapping of the manager-employee relationships. The initial upload will take place during the implementation, prior to go-live. We recommend uploading an updated file quarterly, or as you deem appropriate based on your organization’s needs. Alternatively, account information can be managed manually. We recommend the organization determine which will best meet their needs.

To upload a new registration file:

1. **Select Upload Registrations**
2. Browse for the appropriate file using the IT Skill Builder template
3. **Select Upload Data**

![Upload Tab-Delimited File](image)

Please keep in mind there are some business rules that will apply to the manager assessment process. For example, if the current manager assessment is “Partially Complete” when a new manager is uploaded, the partially completed assessment data is removed and the new manager can complete an assessment on their newly assigned direct report.

If the current manager assessment is “Complete” when a new manager is uploaded, the assessment data remains intact. The new manager can view the original manager’s scores for their new direct report, but cannot edit their assessment.

### 3.3 **Email Invitations & Notifications Pod**

From within the **Email Invitations & Notifications** pod the Administrator has the ability to manage the enterprise wide automated email notifications and update the default email templates.

Enterprise wide automated email notifications are set during the implementation. The default is typically to send all notifications.
To modify the automated email notification settings:

1. Scroll to the **Select Email Notifications for All Users** section
2. Check the appropriate box to turn on, or uncheck to turn off, the following notification options:

![Select Email Notifications for All Users](image)

When selected the:

- **Skills Profile Update** option will send an automated email to a member of the user community who updated their Skills Profile
- **Direct Report(s) Completed Assessment** option will send an automated email the Manager when their Direct Report has completed their self-assessment
- **Manager Completed Assessment** option will send an automated email to the Employee when their Manager has completed their assessment on the Employee
- **Completed Self-Assessment** option will send an automated email to the Employee when he/she has completed their self-assessment
- **Development Plan Goal Complete** option will send an automated email to the Employee when he/she has completed an item on their Development Plan
- **Development Plan Goal is Coming Due** option will send an automated email to the Employee when he/she has a Goal coming due on their Development Plan. Messages are sent 14 days in advance of the item coming due.

To update the default email template text:

1. Select one of the “show template” links for the following email notifications:
   - **Development Plan Email Invitations**: Notifications related to the Development Plan
     - Development Plan Goal Complete
     - Development Plan Goal is Coming Due
     - Development Plan Invitation
   - **Survey Email Invitations**: Notifications related to the Assessments or Skills Profile
     - Completed Self-Assessment
     - Participant Invitation
     - Manager Completed Assessment
     - Participant Reminder
     - Skills Profile Updated
2. Make the appropriate modifications to the template.
3. Select Save to save your changes.

Please note System Administrators can bring in the following data elements into the templates by adding in the appropriate macro.

<table>
<thead>
<tr>
<th>Macros for use within any email template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data</td>
</tr>
<tr>
<td>Recipient Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Macros for use within the Assessment invitations, reminders and completion statuses including the Skills Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data</td>
</tr>
<tr>
<td>Survey Name</td>
</tr>
<tr>
<td>Participant</td>
</tr>
<tr>
<td>Survey Deadline</td>
</tr>
<tr>
<td>Days Survey Overdue</td>
</tr>
</tbody>
</table>

**Macros for use in the Development plan email templates**

| Development Plan Goals | details for one or more dev plan items listed, includes the learning resource title, date due, the type (Book, Tip, Online Course) etc. | $DEV_PLAN_GOALS |
| Development Plan Titles | this is like DEV_PLAN_GOALS but is just the plan item titles (or descriptions if a Tip) only, without all the details | $DEV_PLAN_TITLES |

Please note all email templates will be appended with the IT Skill Builder URL for easy access to the tool from each email.

## 4 Managing Group Administration

The Group Administration feature is where the System Administrator can view and update statuses with regards to current or past assessments that have been configured for the group and user community, send email notifications and export usage data.
When in the Group Administration tab you will be able to determine the following details:

- **Survey Run** is the name of the survey or assessment, usually indicated by year or another naming convention which allows differentiation year over year
- **Start Date** is the start date the survey, or assessment, became available to participants
- **Participant Deadline** is the date the employees are expected to complete their self-assessment
- **Respondent Deadline** is the date people managers are expected to complete the assessments of their direct reports
- **No of Participants** is the number of registered employees who have access to the Assessment module
- **Export Usage** is the report highlighting the combined usage for employees within your organization. See more details below.
- **Survey Status** allow the System Administrator to View Status for a snapshot view of the current level of participation for the selected survey (or assessment). See below for more details.
- **Content Model** is the custom Resource Guide library for clients
- **Start Date** is the date the Resource Guide was made available
- **No. Enrolled** is the number of registered employees who have access to the Resource Guide and Development Plan modules
- **No of Plans** is the number of Development Plans having at least one item from the Resource Guide added to it
- **Manage Job Roles** is where the System Administrator can view and updated the IT Skill Builder default Job Roles and Target Proficiency Levels. See below for more details.

Additionally, when you click on View Status you are able to:

- Obtain a Snapshot of the Assessment or Survey Run to date
- Conduct a host of Administrative actions for each Participant
- Send email reminders
The View Status Summary screen will highlight the following information:

- **Total Participants** is the current number of registered users
- **Not Started** is the number of users who have registered but not begun their Self-assessment
- **Partially Complete** is the number who have not complete and submitted their Self-assessment
- **Self-Survey Complete** is the number who have submitted their Self-assessment
- **Online Results** is the date the Participant generated their Gap Report
- **Status** highlights the status of the Self-assessment. The statuses are as follows:
  - **Self-Complete** indicates a Participant that has “Submitted” their assessment
  - **Partially Complete** indicates that the Participant has started their self-assessment but not yet completed it
  - **Assigned** indicates a Participant that has completed the registration process
- **Responses** refer to the status of the Manager assessment for this Participant
  - **0 of 1** indicates that the Manager has not submitted their assessment of the Employee
  - **1 of 1** indicates that the Manager has Submitted their assessment of the Employee
- **Re-open** is only visible after a participant has submitted their assessment and allows the System Administrator to re-open a participant’s assessment so that they can modify their answers
- **Change** allows the System Administrator to access to the participants detailed User Data views and make edits
4.1 **SENDING EMAIL INVITATIONS & REMINDERS**

To send email invitations and reminders from within Group Administration:

1. Select the appropriate inviation or reminder. **Please see the Email Notifications for All Users section for more information on default text.**
2. Select the appropriate users you wish to receive this email
3. Select **Next**
4. Select **View Recipient List** to validate the appropriate audience has been selected
5. Enter in the subject of your choice in the **Subject** field
6. Select **Test Email**
7. Validate the sample email which was sent to the System Administrator’s email account on file
8. Select **Continue** to send to the selected recipients or select **Cancel**

4.2 **VIEWING ASSESSMENT DATA**

To obtain a comprehensive report of usage and statuses for this assessment or survey:

1. Select the **Export this Survey Run Data** button
2. **Open** or **Save** as appropriate

4.3 **MODIFYING ASSESSMENT STATUSES**

To reopen as assessment for any user:

1. Select the **Re-open** link for the appropriate user
2. Click Confirm. The users “Status” should have updated to Partially Complete and they are now able to access their assessment responses prior to Submitting.

Please note the previously submitted assessment will no longer be available to the employee’s manager.

To reopen a manager assessment (of a direct report):

1. Click the **Responses** hyperlink
2. Select **reopen** in the Change column for the manager
3. Select **Confirm** to reopen (or **Cancel**)

Please note the previously submitted assessment completed by the manager will no longer be available to the direct report.

4.4 **MANAGING JOB ROLES**

When you click on **View Jobs** from the Manage Job Roles column you are presented with a list of all of the job levels (hierarchy) and roles for your organization.

To add a new level role:

1. Select **Add New Level**
2. Enter in the name of the new level in the **Name** field
3. Select **Add New Level**
To add a new job role:

1. Select the **Add Job** button under the appropriate level
2. Enter in the name of the job role in the **New Job Name** field
3. Select **Add Job**

To modify the display order for any job role, including recently added:

1. Select the desired job role by clicking on the respective link
2. Enter in the display order by number in the Order field. Low numbers display on top, high numbers display on the bottom.
3. Select **Change**

To remove a job role:

1. Search for the job role
2. Select **Remove**. Please note any job role with a user assigned to it cannot be removed unless their job role is assigned to another role. If there are users assigned to this role upon selecting Remove you will be provided the opportunity to reassign. Reassign as appropriate.
3. Select **Remove**

To modify the name of the job:

1. Select the desired job role by clicking on the respective link
2. Modify the **Change Name** field as appropriate
3. Select **Change**

### 4.5 Managing Target Proficiency Levels

Target Proficiency Levels, or TPLs, can be updated or exported by the System Administrator.

To manage the Target Proficiency Levels:

1. Select the **Manage Target Proficiency Levels** link
2. Search for the desired job role
3. Find the appropriate competency.
4. Modify the target via the drop down list. The TPL is automatically saved upon selection.

To download your organizations current Target Proficiency Levels by Job Role report in Excel:

1. Select the **Manage Target Proficiency Levels** link
2. Select **Download**
3. Select **Open** or **Save** as appropriate

### 5 Accessing IT Skill Builder Dashboard Reports

To access the standard dashboard reports for IT Skill Builder select the **Reports** tab. Upon selection you will see the following screen:
There are four standard dashboard reports:

- Site Usage Report
- Competency Report
- Skills Inventory
- Skills Inventory Search

The **Site Usage Report** is a graphical representation depicting the number of users who have taken specific actions within IT Skill Builder. These actions include registering, completing a Self-Assessment, completing a Manager Assessment, and adding items to their Development Plan, and the like, for a specified period of time.

To view this report:

1. Select **Site Usage Report**
2. Set your desired date range
3. Select **Generate Graph**

You can remove or add the different usage metrics to your report by clicking on and off of the desired metric. For example, should you wish to remove the “Enrolled” items from your graph simply click on “Enrolled” from within the legend, this allows you to toggle between including or removing the item from the report.
You are able to save the report. The default format type is PNG.

To save the report:
1. Select the download icon in the bottom right corner of the graph
2. Select Save As
3. Save this file in your preferred format to your desired location

The **Competency Report** is a graphical representation depicting the average score of selected Competencies by role based on self and manager responses.

To view this report:
1. Select **Competency Report**
2. Select one or many options from the Competency and Job Role lists
3. Select **Generate Graph**

You are able to save the report. The default format type is PNG.

To save the report:
1. Select the download icon in the bottom right corner of the graph
2. Select Save As
3. Save this file in your preferred format to your desired location

Please note only job roles will appear if they have a completed assessment associated with it.

The **Skills Inventory Report** is an on-demand, dynamic graphical representation highlighting a count of skills by selected job role(s).

To view this report:
1. Select **Skill Inventory Report**
2. Select the desired Category(s), Skill(s) and Job Role(s) and Skill Level(s)
3. Select **Generate Graph**

To select multiple skills from the selection boxed, using the SHIFT key. You can remove or add the different usage metrics to your report by clicking on and off of the desired metric. For example, should you wish to remove skills marked as “Basic” simply click on “Basic” from within the legend, this allows you to toggle between including or removing the item from the report.

You are able to save the report. The default format type is PNG.

To save the report:
4. Select the download icon in the bottom right corner of the graph
5. Select Save or Save As
6. Save this file in your preferred format to your desired location

The **Skills Inventory Search** is an on-demand, dynamic graphical representation highlighting users who have certain skills and skill levels by job role.

To view this report:

1. Select **Skill Inventory Search**
2. Select the desired Category(s), Skill(s) and Job Role(s) and Skill Level(s)
3. Select **Search**
4. Your results will appear. To sort select the desired column header

To export this report in Excel

1. Select the **export data** link
2. Select Save As and save the file to your desired location

Please note only job roles will appear if they have a completed assessment associated with it.

### 6 The Resource Guide

The Resource Guide is a comprehensive guide of learning materials to help IT professionals develop their skills and gain knowledge in the IT Skill Builder competencies. The resources are categorized under Development Actions, Books, Videos / Podcasts, Blogs, Articles, Instructor-Led Courses, eLearning Courses and Websites. As a System Administrator you will be able to modify the standard Resource Guide - adding to or removing from the default content.
6.1 **ACCESSING THE GUIDE**

1. Select the **Command Post** tab and then select **Content Administration**. You will be presented with a list of all the competencies your organization is utilizing.
2. Select the desired competency you wish to view the contents of by clicking the respective hyperlink. You will see all of the published and unpublished resources.
3. To view the details of a resource, select **edit**
4. Select **Cancel**

6.2 **MODIFYING THE GUIDE**

To add a custom resource to the Resource Guide:

1. Select the competency you wish to add the resource to by clicking on the respective hyperlink. You will be presented with a list of all of the resources for this competency along with resource details.
2. Click on the **+ Add New Resource** button. The following **Add / Edit Resource** screen will appear.

3. Enter in the specific resource details. Please note detail fields associated with a particular resource will differ depending on the “Type” of resource you are adding.
   - **Title**: Title of the resource
• Type: Select from Blogs, eUniversity, Instructor-Led, Tips, Websites, Book, Training Course, Article or Video
• Library: Your organization should appear by default, if not please select your organization and notify IT Skill Builder support.
• Published: Check to publish or display the resource within the Guide or Uncheck to un-publish or not display this resource within the Guide
• URL: Enter in the URL for the Resource

4. Select the Competency(s) you wish to link this resource to by clicking on the appropriate resource within the Resource Mapping section. Please note System Administrators will have the option to select one or more Competency(s) by expanding the section and clicking the “All...” checkbox. If you would like this resource to appear at the top of the Resource Guide for a specific competency and type, simply select the “Spotlight” checkbox.

5. Click on Save to save your updates to the Resource Guide.

To edit a resource:

1. Select the competency the resource is linked to
2. Select the specific resource you are looking to edit
3. Select Edit
4. Make the appropriate modifications to the resource including
   a. Publish: display within the Resource Guide
   b. Unpublish: remove display from within the Resource Guide
   c. modify resource attributes including URL, title and more
   d. Updating resource mapping: to remove or add to other competencies
   e. Mark as a Spotlight
   f. Delete
5. Select Save

7 MY CAREER JOURNEY

The My Career Journey settings are modifiable via an XML configuration file. The settings determine at the organizational level the information which appears on each profile. The profile for the Employee and the Manager are the same. The configurable items and their defaults settings are as follows:
To modify these settings please email IT Skill Builder Support. Keep in mind, these changes require approval by your Executive Sponsor or Business Owner for IT Skill Builder due to the nature of the impact.