



IT SKILL BUILDER 6.2

ADMINISTRATOR GUIDE

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TABLE OF CONTENTS

1	Welcome	4
2	Account Set Up	4
	• Single Sign On (SSO)	4
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.....	17

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 move 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

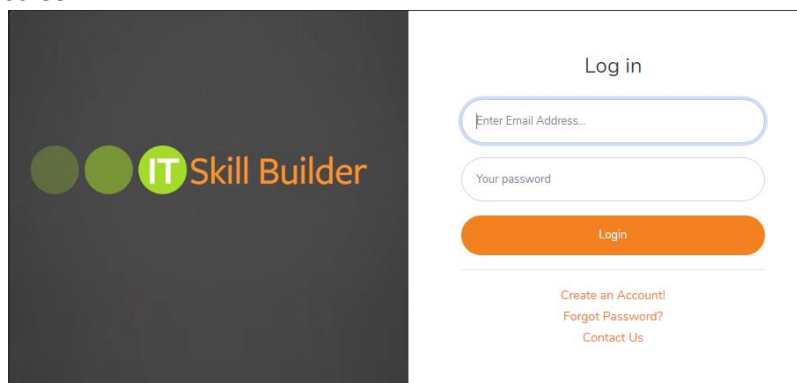
Creating an IT Skill Builder account is easy. Most organizations will integrate a single-sign on (SSO) capability to bypass the full registration process and to streamline username and password maintenance. This is the custom method. Other organizations allow the users to create and maintain their password 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.

- **SINGLE SIGN ON (SSO)** users will be provided with a custom URL that 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.

General Access to IT Skill Builder is found here: www.itskillbuilderassessment.com

Please note that Administrators cannot ADD a user to IT Skill Builder. Individuals must create their own account by registering via the site URL and with an Admin provide PIN code.

When you access the site as a **GENERAL USER** (non SSO), you will be presented with the following login screen:



The login screen is divided into two main sections. On the left, there is a dark grey vertical bar containing the IT Skill Builder logo, which consists of three green circles followed by the text 'IT Skill Builder' in orange. On the right, the background is white. At the top right, the text 'Log in' is displayed. Below this, there are two input fields: the first is labeled 'Enter Email Address...' and the second is labeled 'Your password'. Both fields have a light blue border. Below the password field is an orange button with the text 'Login' in white. At the bottom of the white section, there are three links in orange text: 'Create an Account!', 'Forgot Password?', and 'Contact Us'.

To register for an IT Skill Builder account:

1. Click on the **Create an Account** link.
2. On the **Register an Account!** page, enter the PIN code supplied by your site administrator.
3. In the **Email** field enter in your work-related email address as this is how the system will identify you.
4. Enter in your First Name and Last Name in the respective fields
5. When complete, select **Register Account**.
6. Create a password for IT Skill Builder and confirm
7. "Select your Job" by clicking the job role that most accurately describes your current role*
8. Select **Update Preferences**.

**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. Once you have registered your IT Skill Builder account, email at support@ouellette-online.com to request Administrator rights.

3 MANAGING USER ADMINISTRATION

To access the **User Administration** submenu first select the **Admin menu**. From within this screen the System Administrator can search for existing users, modify a user account, edit default email templates, and administer email notification settings for your user community.

The screenshot displays the User Administration interface. On the left, there is a section titled 'Email Invitations' with a sub-section 'Email Invitations & Notifications'. On the right, there is a sidebar titled 'Users' with a green user icon. Below the icon are two buttons: 'Add Non Survey User' and 'Upload Registrations'. The main area is titled 'Search Users' and contains three input fields: 'First Name:', 'Last Name:', and 'Email:'. Below these fields are two buttons: 'Search Users' and 'Clear'.

3.1 SEARCH USERS POD

The **Search Users** pod allows the System Administrator to manage all 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

First Name	Last Name	Email	Active User?	Development Content Model	
Trey	Employee	trey@test.com	true	Content Model	view
test	user	dfgg@test.tst	true	Content Model	view
Therese	Employee	casey.emp2@test.tst	true	Content Model	view

[New Search](#)

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.

Add/Edit User Information:

First Name*	<input type="text" value="Jose"/>
Last Name*	<input type="text" value="Roberts"/>
Email*	<input type="text" value="jroberts@yourcompany.com"/>
Manager Email:	<input type="text" value="ssmith@yourcompany.com"/> <input type="button" value="x"/>
Active User?:	<input checked="" type="checkbox"/>
Login ID:	<input type="text"/>

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

1. Select **view**

2. Select **edit**
3. Review the Manager Email address

To modify a user's Manager:

1. Select **edit**
2. Select **Change Manager**
3. Enter in the New Manager Email address in the respective field
4. Select **Search*** (new managers must already be registered in the site)
5. **Save**

NOTE: You must use the Change Manager wizard to complete a manager swap. Typing a manager email in the form, will not complete a manager update.

To modify the user's password:

1. Select **edit**
2. Select **Change Password**
3. Enter in the **New Password** and **Retype...**
4. **Save**

Notify the client to reset their password to a more secure password via the Preferences menu

To deactivate or reactive the account:

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

3.2 USERS POD

From with the **Users** pod the System Administrator can:

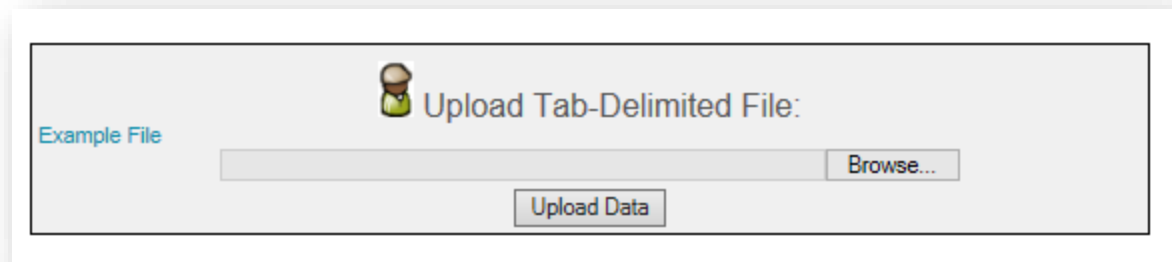
- Upload Registration Information

NOTE: Administrators cannot add users to the site. People must register their own account.

The **Upload Registration** feature allows the Administrator the ability to upload a tab delimited file, typically from an 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**



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.

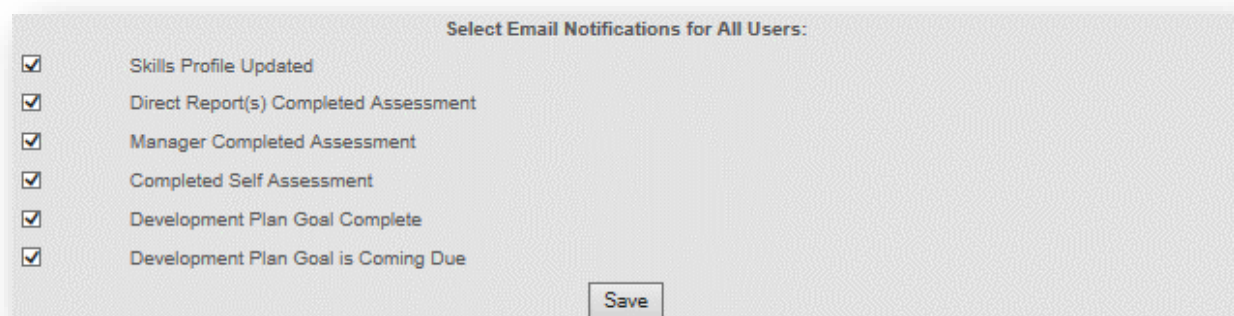
3.3 EMAIL INVITATIONS & NOTIFICATIONS POD

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:



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
 - Respondent (a respondent is a people manager) Reminder.
 - Directs Reports Completed Assessment
 - Respondent (a respondent is a people manager) Invitation.

The following screen will appear with typical word processing functions:

Subject:

Email Body:

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾

↶ ↷ Paragraph ▾ Font Family ▾ Font Sizes ▾ B I [List Icons]

[List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons]

Hello \$RECIPIENT_NAME,

You have not yet completed the competency assessment on \$PARTICIPANT. Manager feedback is important to employee growth and development. Please take time to complete the assessment at your earliest convenience.

Regards,

The IT Skill Builder Team

To access IT Skill Builder, please click here:

p Words: 46

Save

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.

Macros for use within any email template		
Data	Description	Macro
Recipient Name	first name of the email recipient	\$RECIPIENT_NAME
Macros for use within the Assessment invitations, reminders and completion statuses including the Skills Profile		
Survey Name	is the name of the survey-run	\$SURVEY_NAME
Participant	is the name (first and last), or list of names for all of the survey participants* which a respondent* needs to complete	\$PARTICIPANT
Survey Deadline	date specified in the survey-run settings on which the respondent or participant should complete assessments	\$SURVEY_DEADLINE
Days Survey Overdue	works off the SURVEY_DEADLINE date above, expressed as a number of days	\$SURVEY_OVERDUE_DAYS

	past-due; only really useful for sending out emails after the deadline has past	
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 expect to complete the assessments of their direct reports
- No of Part(icipants) 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

Send Invitation

Participant Invitation

Respondent Invitation

Send Reminder

Participant Reminder

Respondent Reminder

Summary

<div>Survey Phase: Self Survey</div> <div>Total Participants: 25</div> <div>Not Started: 10</div> <div>Partially Complete: 6</div> <div>Self Survey Complete: 9</div>	<div>Survey Phase: Survey Others</div> <div>Total Respondents: 11</div> <div>Not Started: 1</div> <div>Partially Complete: 3</div> <div>Surveyed Others: 7</div>
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Survey Run Name:

Ouellette Core Skills Assessment

update

Run Start:

2017-01-01

Participant Deadline:

2020-01-01

Respondent Deadline:

2020-02-12

Run Close Date:

Export this Survey Run Data

Participant Details

Show 50 entries

Search:

Online Results	Last Name	First Name	email	Last Contacted	Status	Responses	Re-Open	Change
	Ouellette	Mgr	sixmgr.ouellette@itsb.com		Partial Complete	0 of 0		edit
	ManagerA	Tom	mgra@itsb.com		Partial Complete	0 of 0		edit
	EmployeeB	Tami	tami@itsb.com		Assigned	1 of 1		edit

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
 - *Partial 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 but not started the assessment
- **Responses** refer to the status of the Manager assessment for this Participant
 - *0 of 0* indicates that no manager is assigned for this user account
 - *0 of 1* indicates that the Manager has not submitted their assessment of the Employee
 - *1 of 1* indicated 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 invitation 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 an 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:

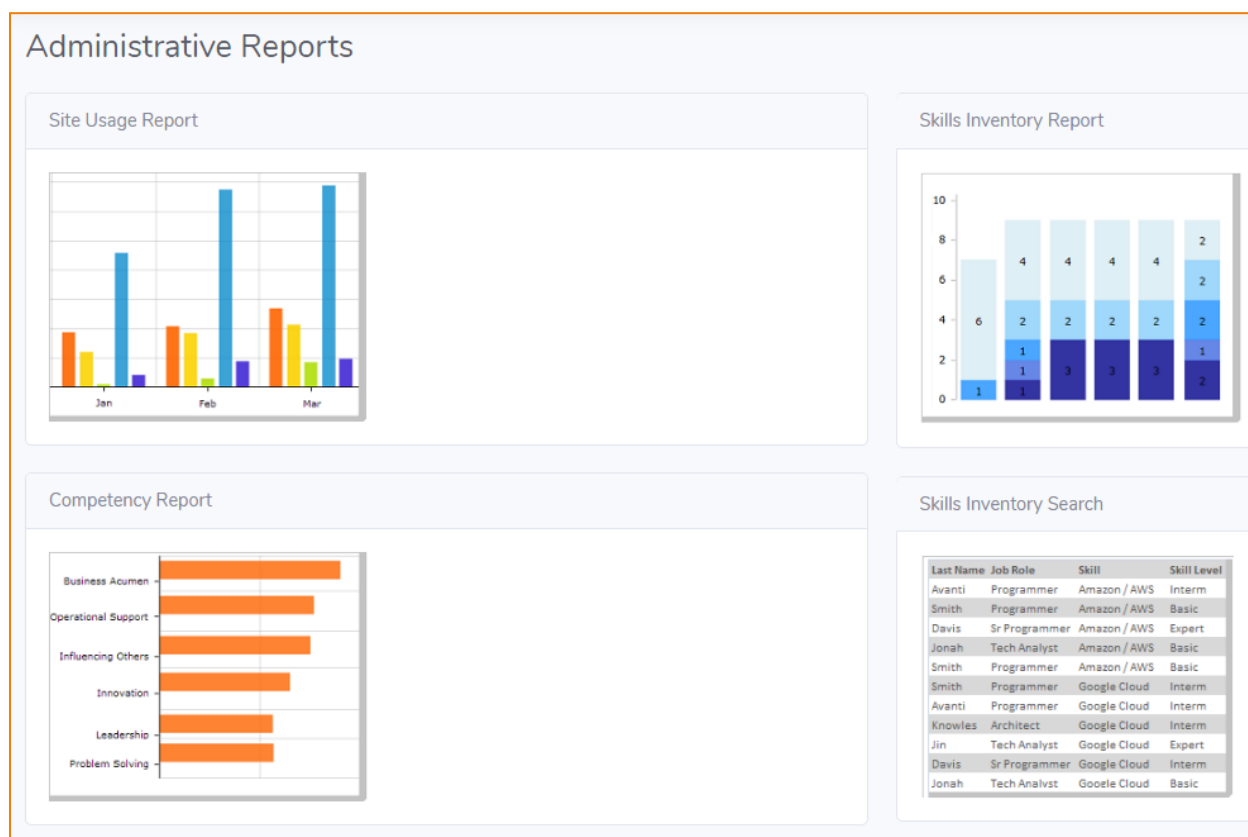
1. Select the **Manage Target Proficiency Levels** link
2. Search for the desired job role
3. Find the appropriate competency.
4. Modify the target via the drop down list. The TOLL is automatically saved upon selection.

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:

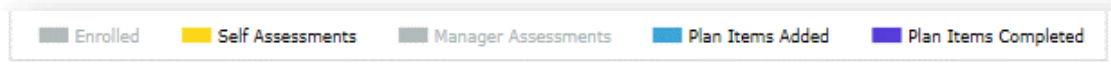
- Site Usage Report
- Competency Report
- Skills Inventory
- Skills Inventory Search

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 you 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.