

Administrator's Manual (Update)

Skills Module

a product of telania

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Admin: Skills Module

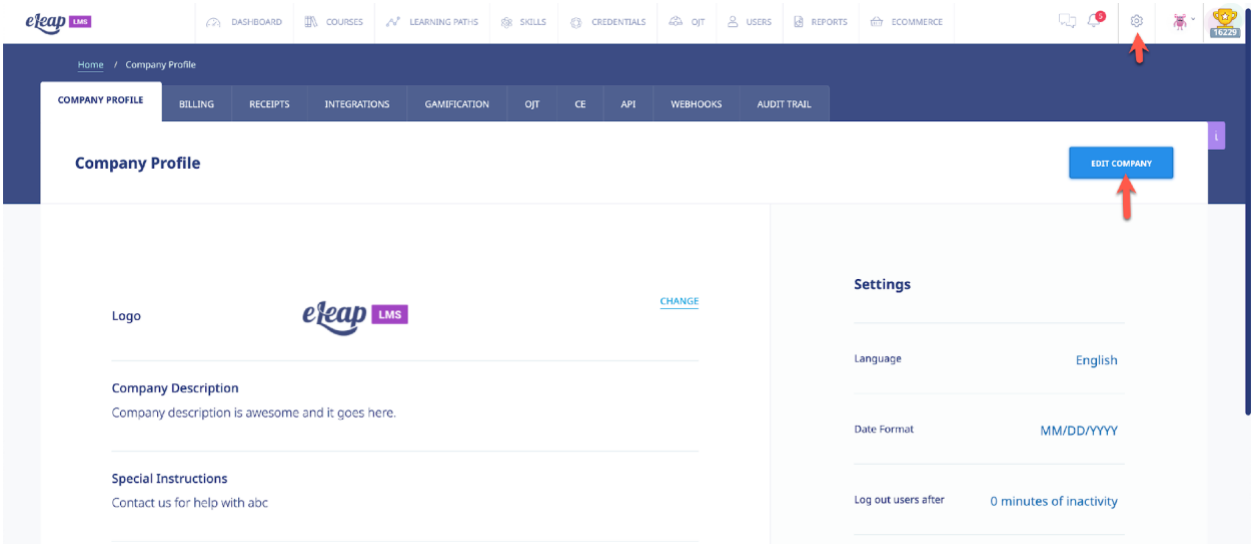
This is a quick user guide for the eLeaP LMS Skills Module. Please contact eLeaP to enable the Skills Module in your account:

Two scoring modes. Your account measures skills in one of two modes: Percentage or Levels. The screens, columns, and filters described in this section (Course %, OJT %, Manual %, and the Beginner, Intermediate, and Advanced filter) belong to Percentage mode. If your account uses Levels, see Admin: Skills Levels later in this guide.

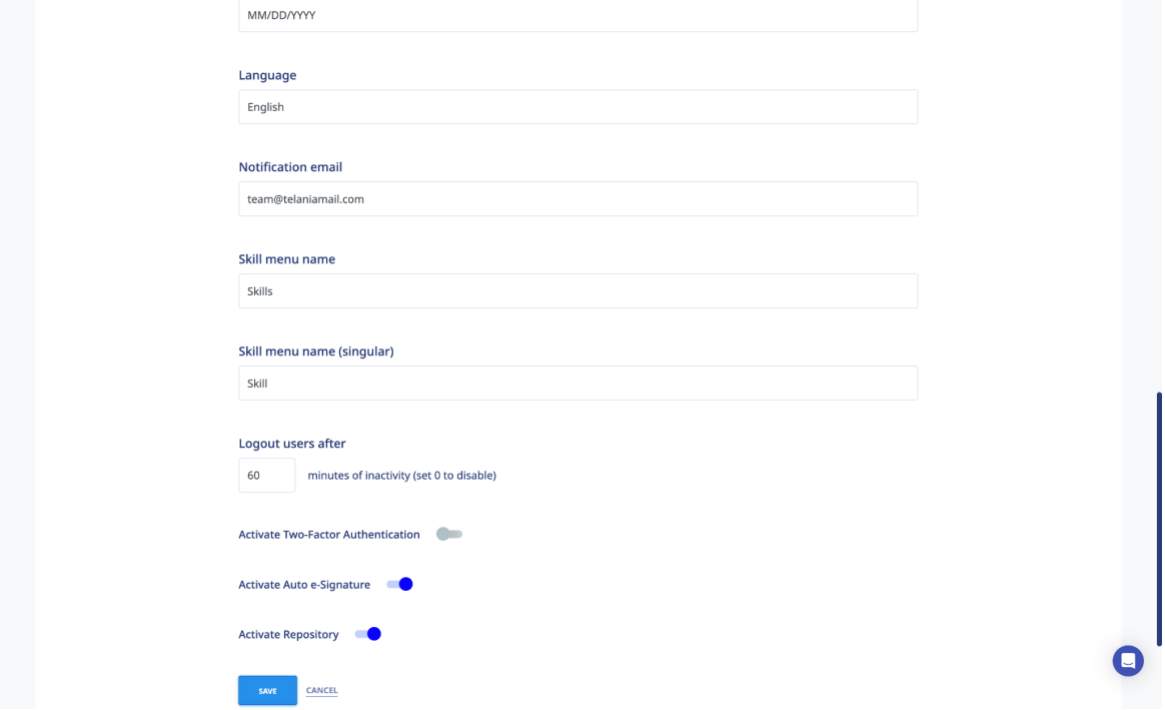
Company Profile > Customization

You can rename the Skills Module menu item to your own menu version, however, please be mindful to keep the name short, as a long name would negatively impact the design of the platform.

To edit the Skills menu item, go to our company account page and click the [Edit Company] button:

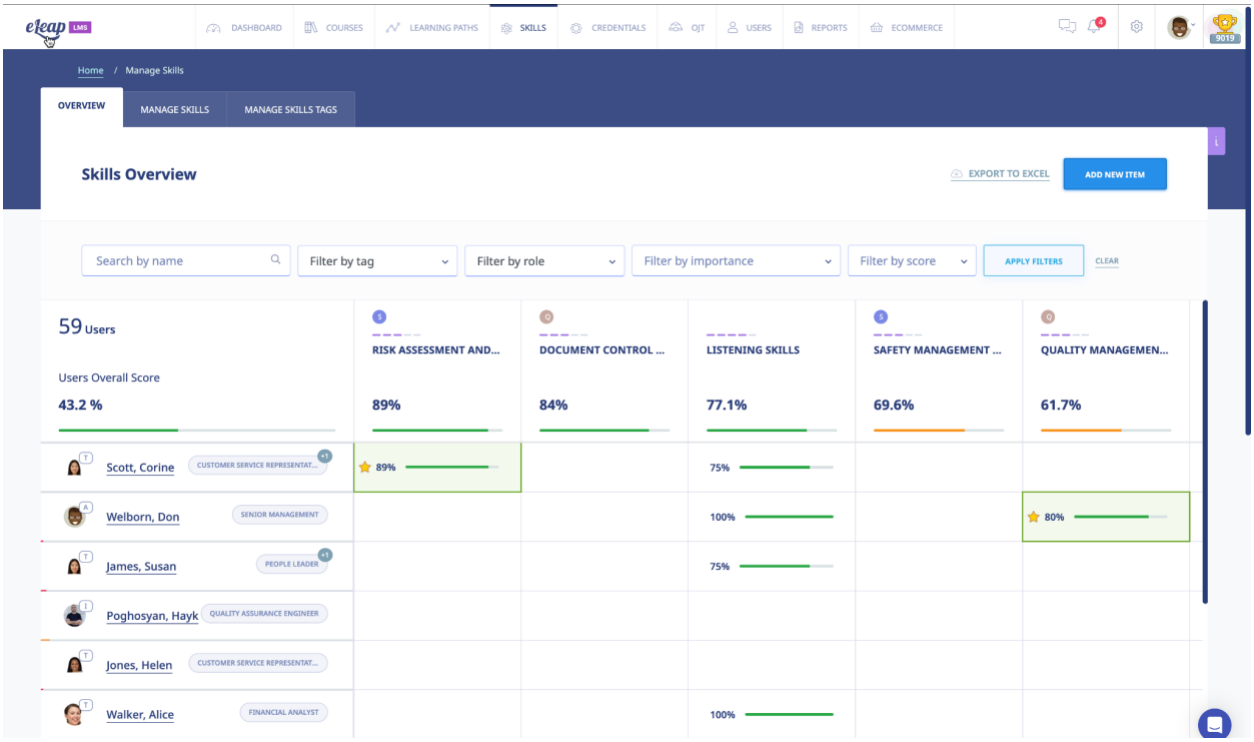


Next, scroll to the [Skills menu name] section:



Make your changes and save.

Once changed, the menu item will change to reflect your changes.



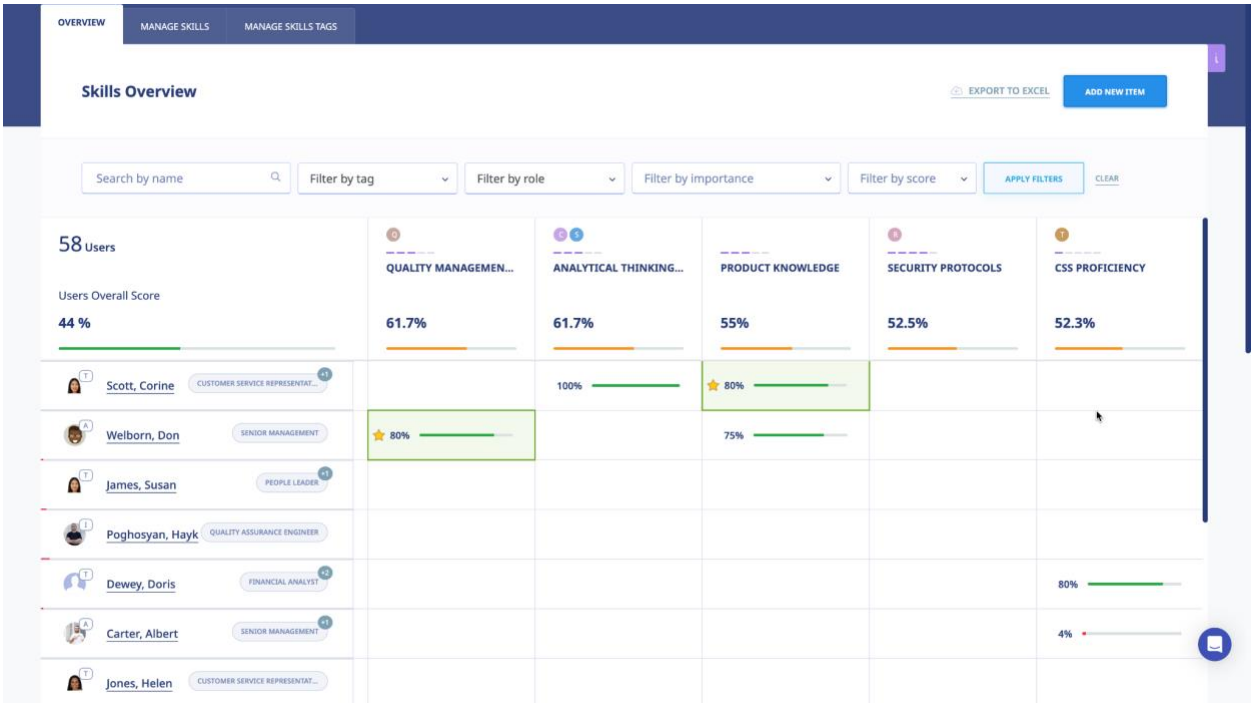
To undo your changes, delete whatever you entered in the Skills menu name and save your changes.

Skills Overview

The **Skills Overview Page** provides a central dashboard for managing and monitoring skills and competencies within your organization. It offers quick access to essential data, including skill attributes, associated users, courses, On-the-Job Training (OJT) items, and manual entries.

Before using the Skills Overview Page:

- Ensure the **Skills Module** is activated in your account.
- For data to populate, you need assigned and associated courses.



Add New Item

The **[Add New Item]** button allows you to add skills directly from the Overview Page.

Steps to Add a Skill:

1. Click **[Add New Item]**.

2. Enter the skill details, including:
    - **Name**: A clear and descriptive skill name.
    - **Tags**: Relevant categories for grouping similar skills.
3. Save the new skill.

Filtering Options:



Search by name:

You can use the [Search by name] option to search for specific users or specific skills. This is a versatile approach to searching to get access to data for users or skills you're interested in.

Filter by Tag:

Use the [Filter by Tag] option to search for Skills grouped under specific Skills Tags. This is another effective way to easily narrow the search results according to specific Skills Tags (or categories). You can even combine filters. For example, you can filter by Tag and say 'Score'.

Filter by Role:

Use the [Filter by Role] option to search for Skills grouped under specific user Roles. This is another effective way to easily narrow the search results according to specific Roles.

Filter by Importance:

Are you in a hurry and want to find users who have mastered your highest-importance skills? Use the 'Filter by Importance' to pull down this information.

Filter by Score:

Want to see which users earned the highest score in their skills? Use the 'Filter by Score' to get this information.

As with most search systems, the more highly specific the search or filters, the smaller the number of records you can expect to return. If you expect more results, broaden your search or filtering criteria or contact us. Use the [Clear] option to reset data in the Overview section.

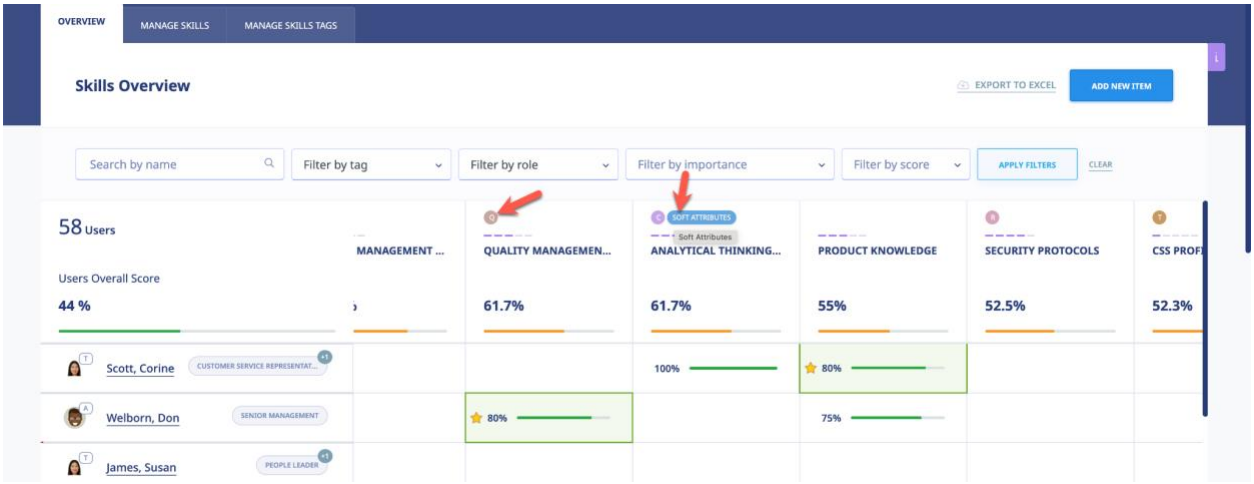
Scrolling Options

The dashboard supports both:

- **Horizontal Scrolling**:
    - View additional columns across the data table.
- **Vertical Scrolling**:
    - Navigate through all displayed rows.

Skills Column - Skills Tag Expand/Collapse:

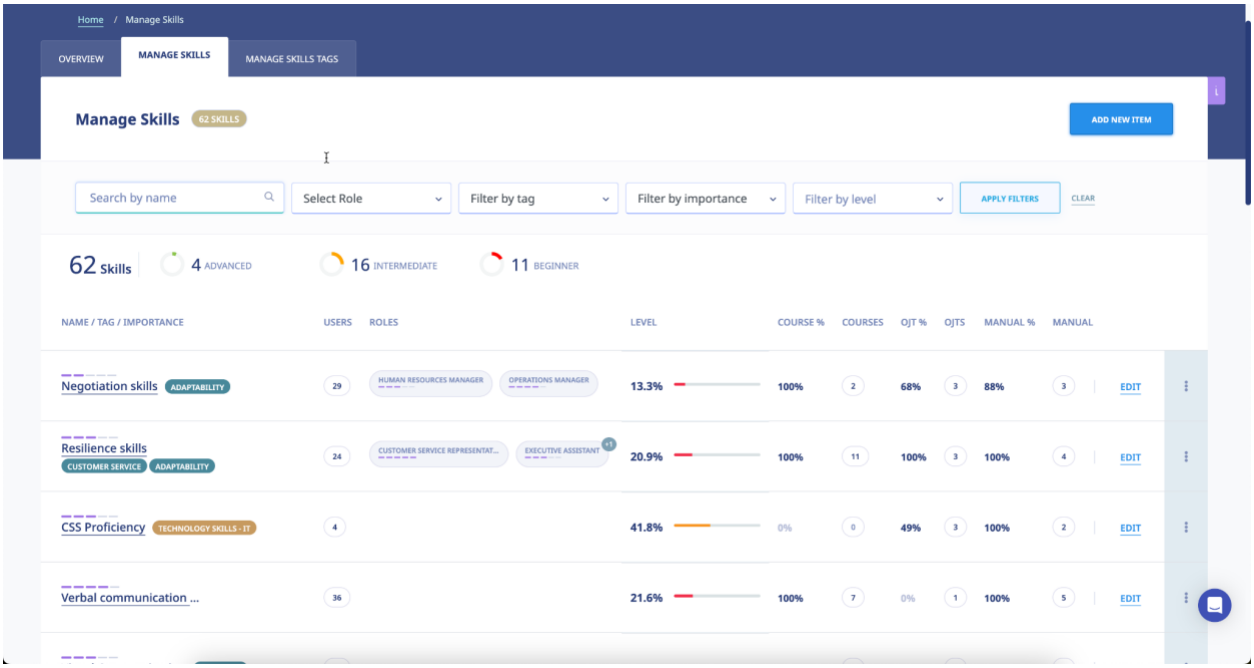
We utilize a smart system to display the first letter of the skills tag, allowing us to provide more information in the Skills column. Hover over the skills letter to expand to the full skill tag.



You can also click on a specific Skills tag or Skills name for detailed information about that skill. For example, you can click on, say, 'Analytical Thinking' to get details regarding which users are currently proficient in that skill and which courses are associated with that skill. From the details page, you can also access associated roles and courses for the skill.

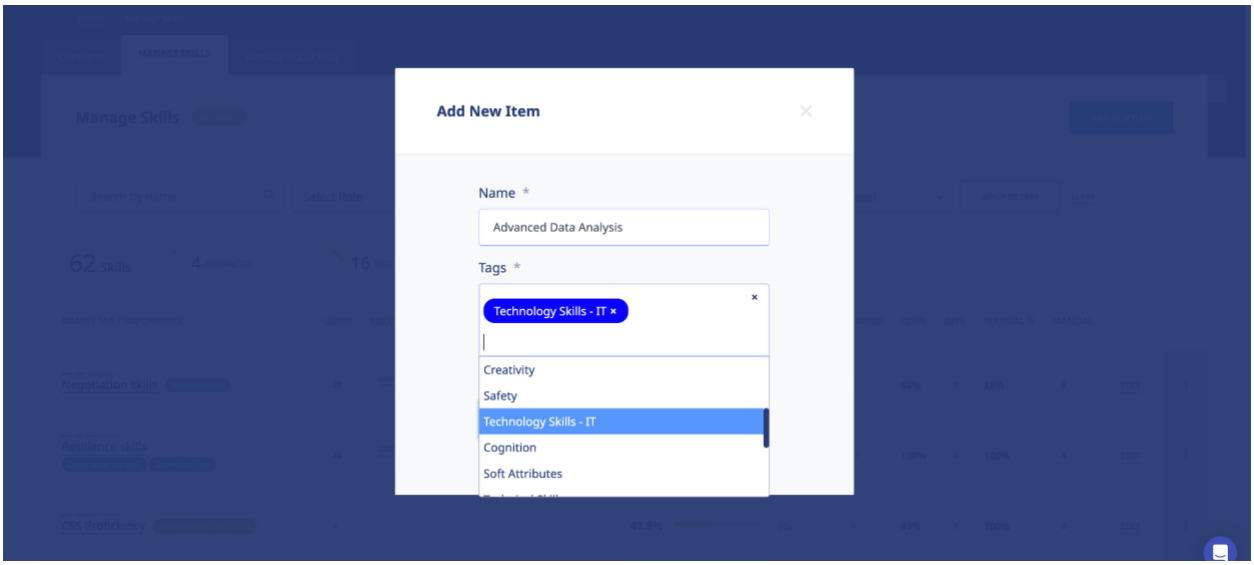
Manage Skills

Use the [Manage Skills] tab to create new Skills that you can associate courses with. To create a new Skill, click the [Add New Item] button.



Add New Item

After clicking the [Add New Item], fill out the New Skill form as follows:



Name:

Add the name of the new Skill you're creating. It is important to make the Skill Name that provides context to the viewer. Examples of Skill Names include Negotiation, CSS Proficiency, Verbal communication, Leadership, Conflict Resolution, etc.

Tags:

Select appropriate Skills Tags or create a new tag on the fly. Simply search for tags to associate with the new Skill you are creating. If none of the existing tags satisfy your needs, create new tags on the fly.

If everything looks good, click the [Save Item] button to finalize the new Skill addition.

Add User(s) to Skills.

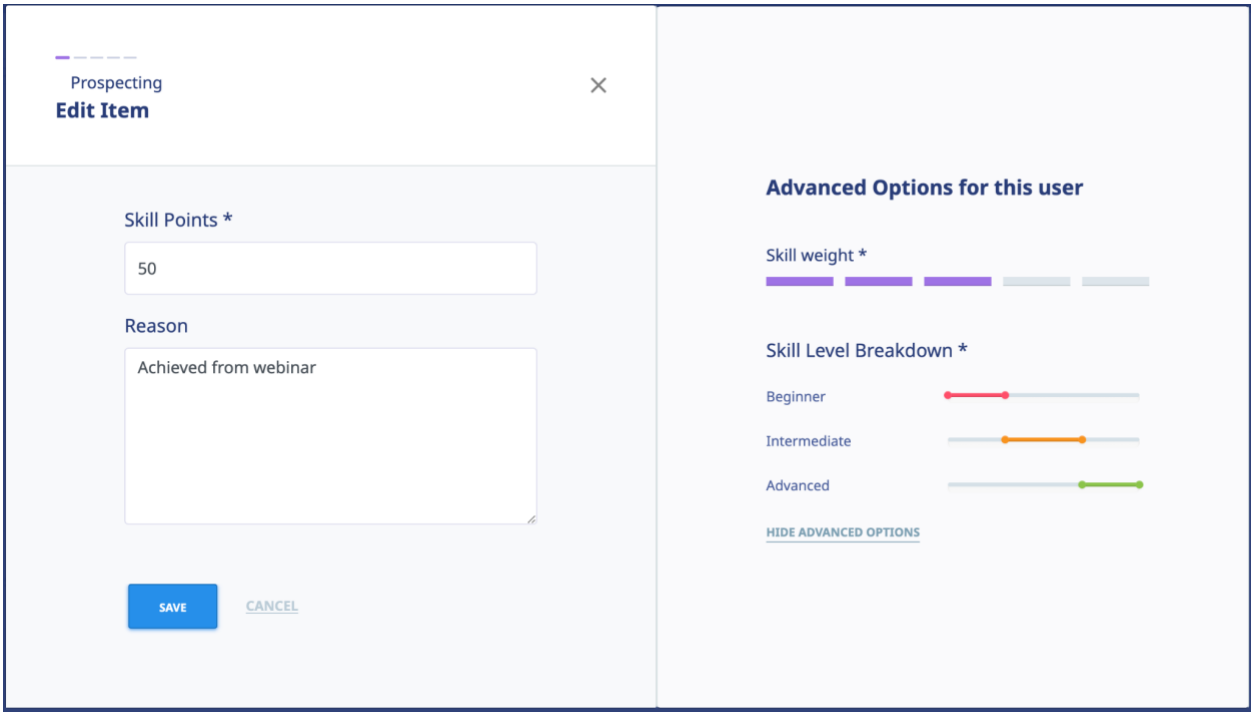
Users can be added to Skills in three ways.

Add Users Directly:

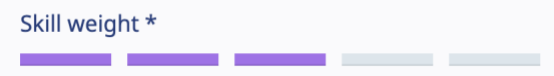
From the Skills details page, click the [Add User] button to select users to add to the Skill. Once the user is selected, you will add the Skills points or percentage earned for this skill. You can also add a description or reason. You can also click the [Advanced Options] to set additional skills parameters.

Advanced Options

Clicking the Advanced options shows the Skills Weight and Skill Level Breakdown section.

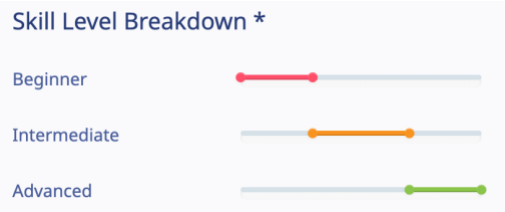


Skill Weight:



What is the importance of the skill to your organization? Skill weight measures how valuable the skill is to your organization. The default value is [Normal], but you can select other levels of importance like [Critical], [High], [Low], or [None]. Remember you can filter your skills data by importance level once you start getting Skills activity.

Skill Level:



Select how much weight you want to assign to associated courses. This is what we award to each completion of the associated course. The Skill Level enables you to assign proficiency levels for the Skill. We use a series of sliders to enable you to determine the proficiency levels for the three proficiency levels:

Proficiency levels:

- Beginner: Starting. A novice but has the potential to learn and skill up.
- Intermediate: Mastered basic concepts and is ready for advanced skills.
- Advanced: Achieved advanced mastery of subject matter.

Note that because the Proficiency level sliders are cumulative, the slider of the next level also adjusts as you adjust the different levels.

Filtering Options:



You can filter data by name, role, tag, importance, or level in the Manage Skills area.

Name:

Searching by name brings up Skills that match the searched term.

Role:

Search by user role to bring records based on the user roles assigned to skills.

Tag:

Use the Filter by Tag to display only Skills in a particular Skill category called Tags.

Importance:

If you filter by importance, only Skills matching the particular importance criteria are displayed when the [Apply Filters] button is clicked.

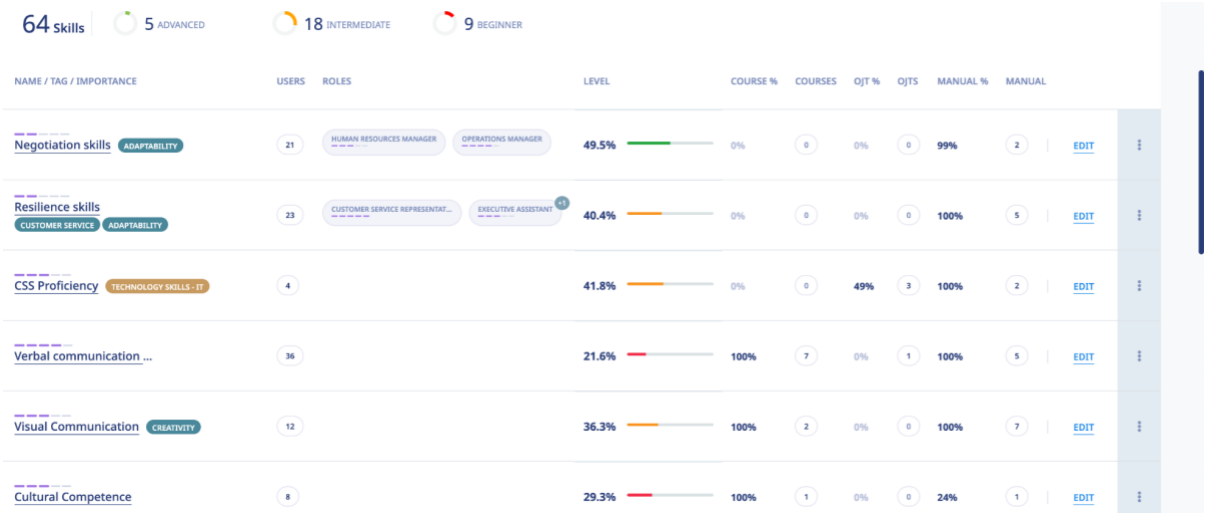
Level:

Filter by level to show skill records based on user proficiency level: Advanced, Intermediate or Beginner.

You can click the [Clear] button to reset the data displayed at any point.

Skills Data Table:

The data table shows information about Skills such as Name/ Tag/Importance, Users, Roles, Level Course %, Courses, OJT %, OJTs, Manual %, and Manual.



Name/Tag/Importance

Shows the skill name, associated tags, and importance of the skill. Click on the skill name to see details about the skill.

Users:

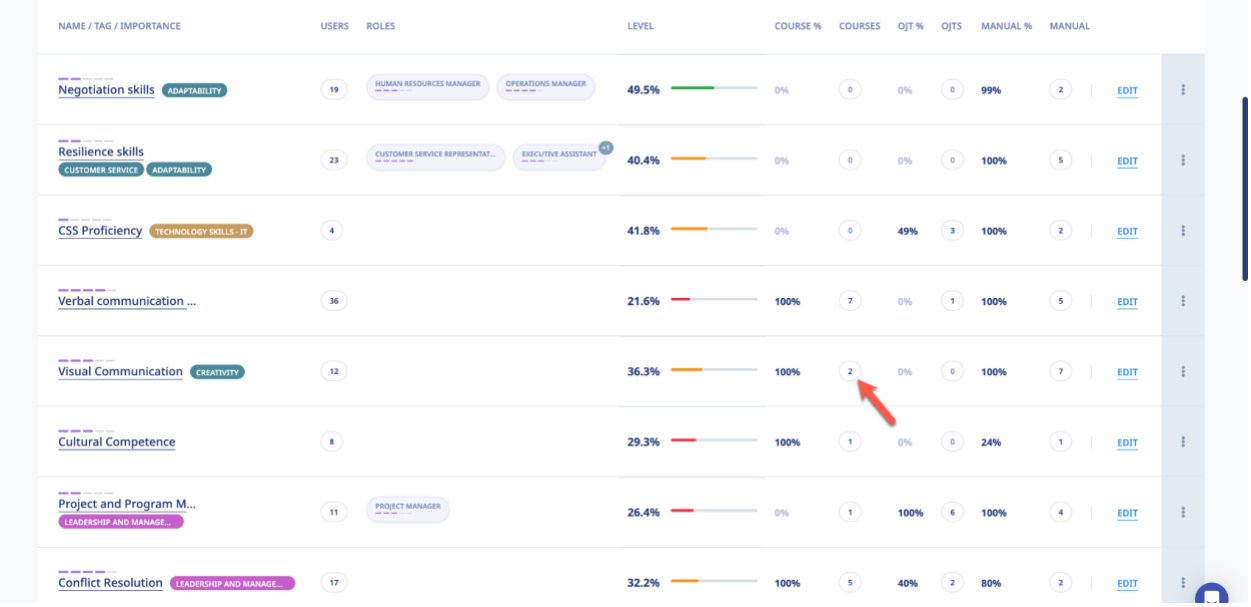
If the skill has any associated assigned users, this information will be displayed in the data table. Click the [X USERS] link to see details about the users currently associated with the skill.

Level

Level shows the combined activity level of all users associated with the skill. Hovering over the progress level shows the distribution of skill levels across the advanced, intermediate, and beginner levels.

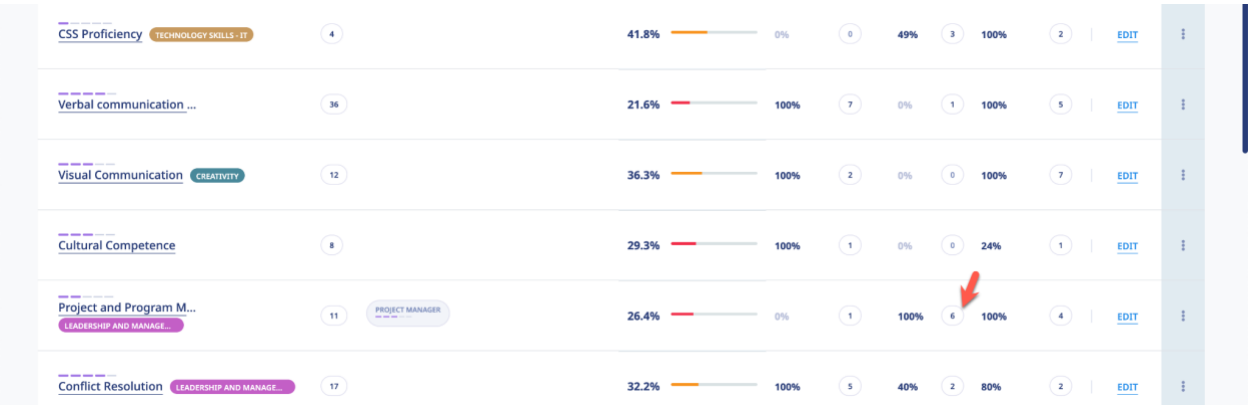
Course % and Number:

This information will be displayed in the data table if the skill is associated with any courses. Click on the [X COURSES] link for details about the courses currently associated with the skill.



OJT % and Number:

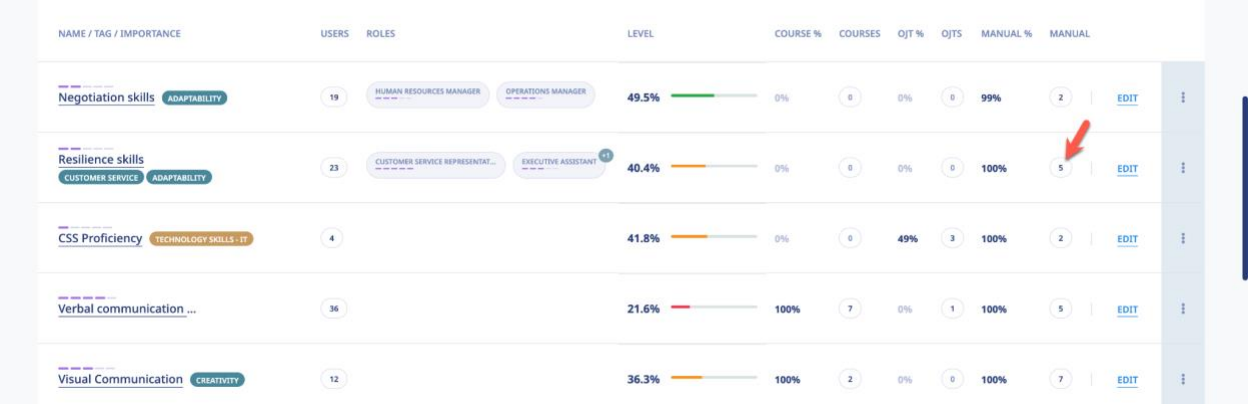
This information displays the number OJT (On the Job Training) entries associated with the specific skill. Click on the [X OJT] link for details about the OJT entries associated with the skill.



Manual % and Number:

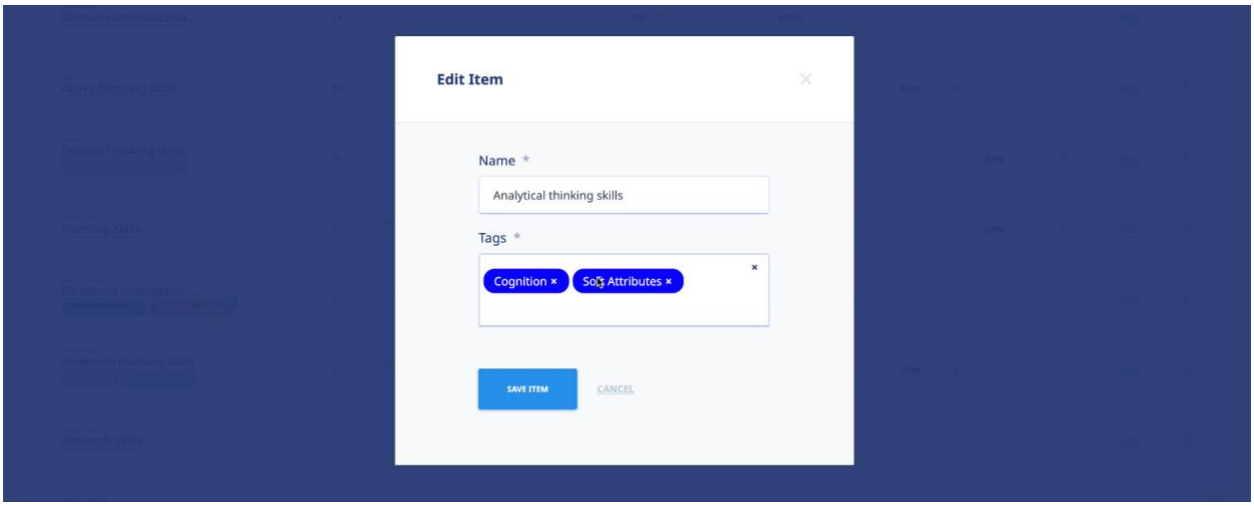
This information discusses the number of Manual entries associated with the specific skill. Click on the [X Manual] link for details about the Manual entries associated with the skill. Manual entries are designed

to be flexible and customizable to suit almost all types of associated non-course or OJT-type training or learning opportunities like seminars, webinars, conferences, and other types of training.



Edit

You can click the [EDIT] link to edit the current skill.



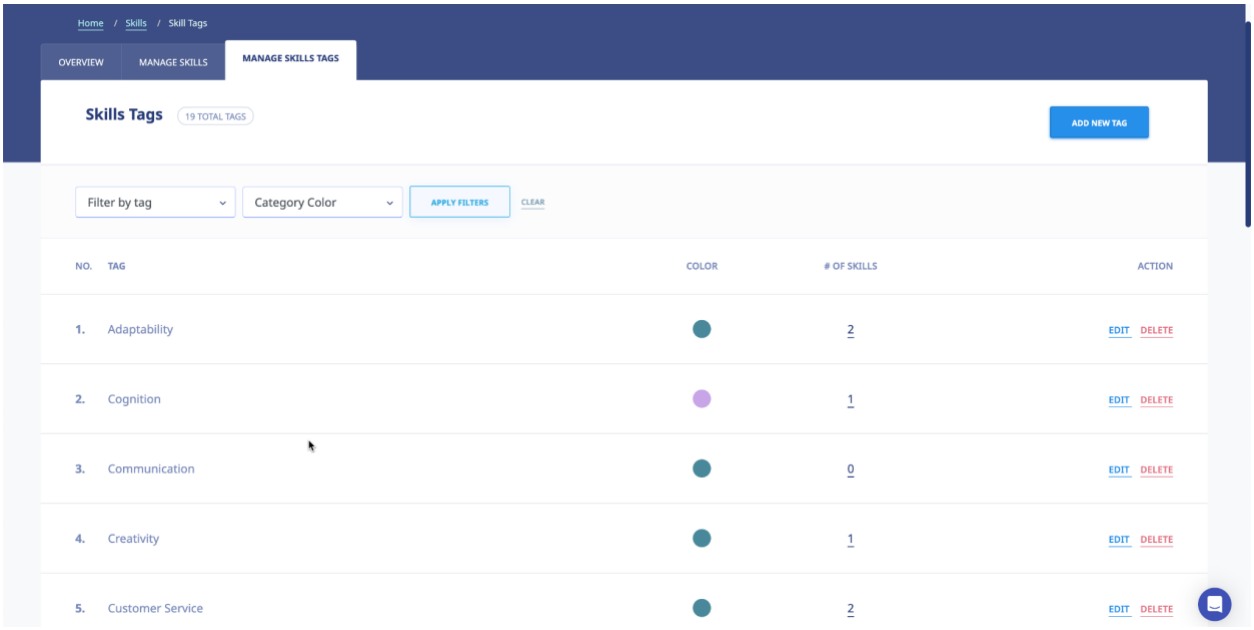
You can use the [Delete] link to delete the respective Skills.

Manage Skills Tags

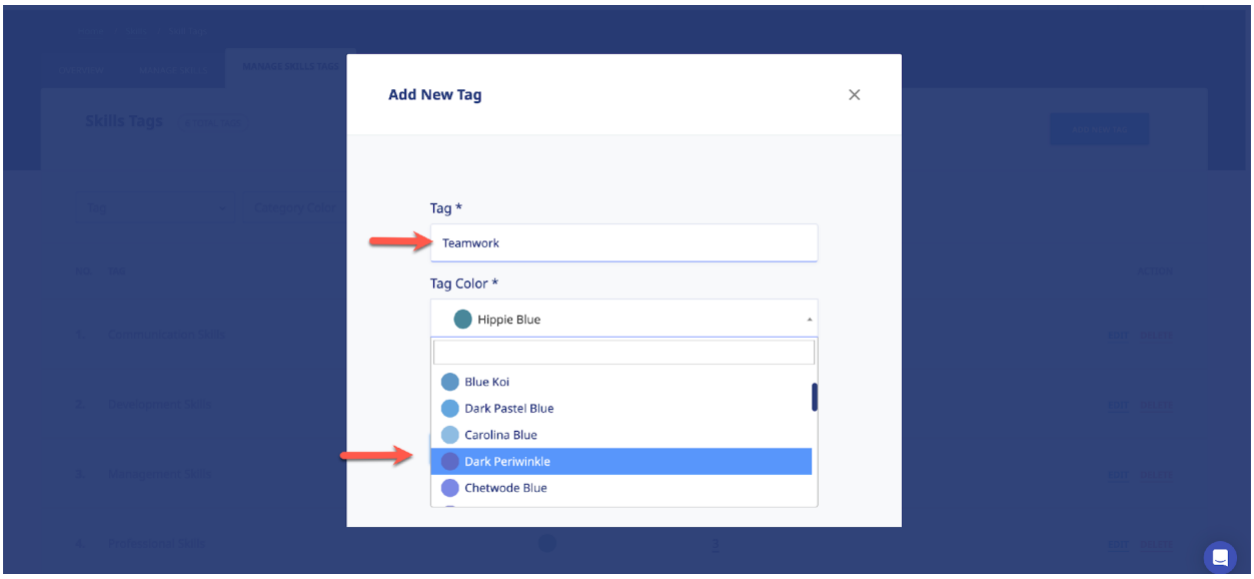
Skills Tags are like 'categories'. They help you organize your skills so is easier to understand how these competencies work. To start, create skills tags. Here's how:

Add Skill Tag

Click the [Add New Tag] button:



Enter the tag name and select a color to help differentiate your skill tags:



Edit Skill Tag

To edit an existing tag, click the [Edit] link next to the tag. Please note that editing a tag does not change any associated courses.

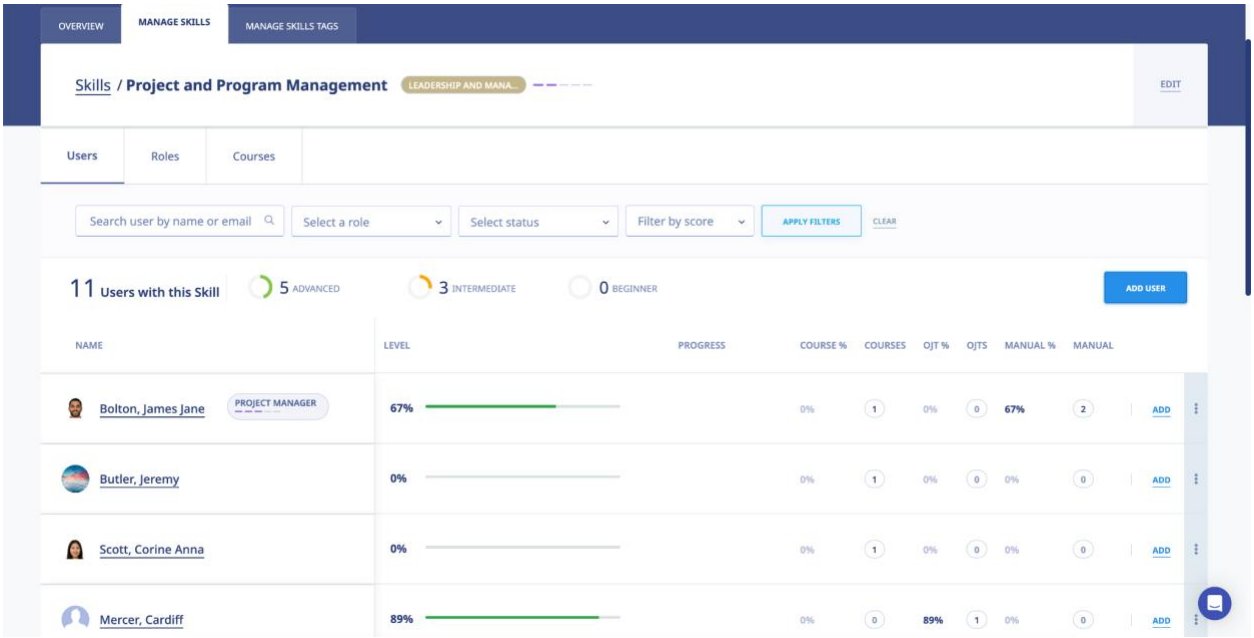
Delete Skill Tag

To delete a Skill Tag, click the [Delete] link next to the tag. Deleting a Skill Tag removes that tag from the associated Skill however, the Skill remains, and any associated courses are also retained.

Skill Details:

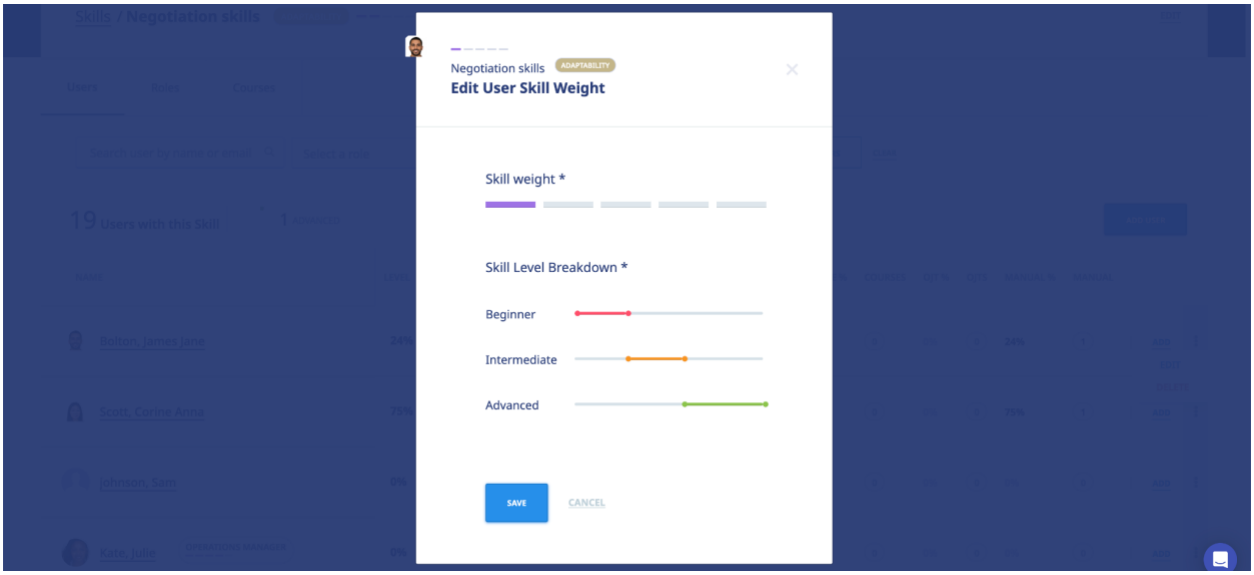
Users

Clicking on the name of the Skill displays associated with detailed information pertaining to that skill.



For example, clicking on the 'Project and Program Management' skill displays the above information. The Skill tag is shown in the top section of the page. The Skill importance is also shown in the top right section of the page. The currently assigned Users are displayed in addition to their skill completion level. Users can be filtered by name, role, status, or score. You can also click on the skills level charts to see users at various levels.

To add users to the Skill, click the [Add User] button. To edit a user's skills level or weight, click the Edit from the three dots:



As with other pages, clicking on the user's name or any other skills table details will provide additional information.

You can click on the user's name to get details about the current user's skills activity.

- To add manual points to the user's skill, click the [ADD] link.
- To [Edit] the user >skill, click the [EDIT] link from the dots (ellipsis).

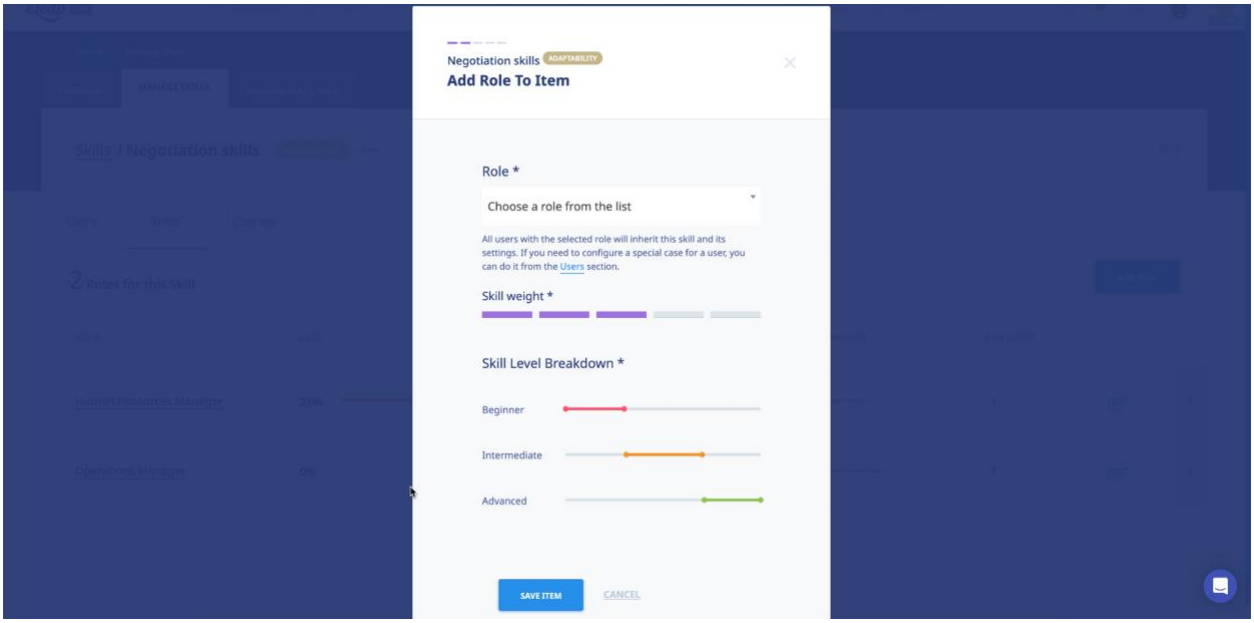
Don't forget that course completions can also earn skills points. To set your course to attribute points, go to the course settings page and click on the Skills settings.

Roles

Click the [Roles] sub-tab to see which roles are currently associated with the skill.



Click [Add Role] to add roles to this skill.



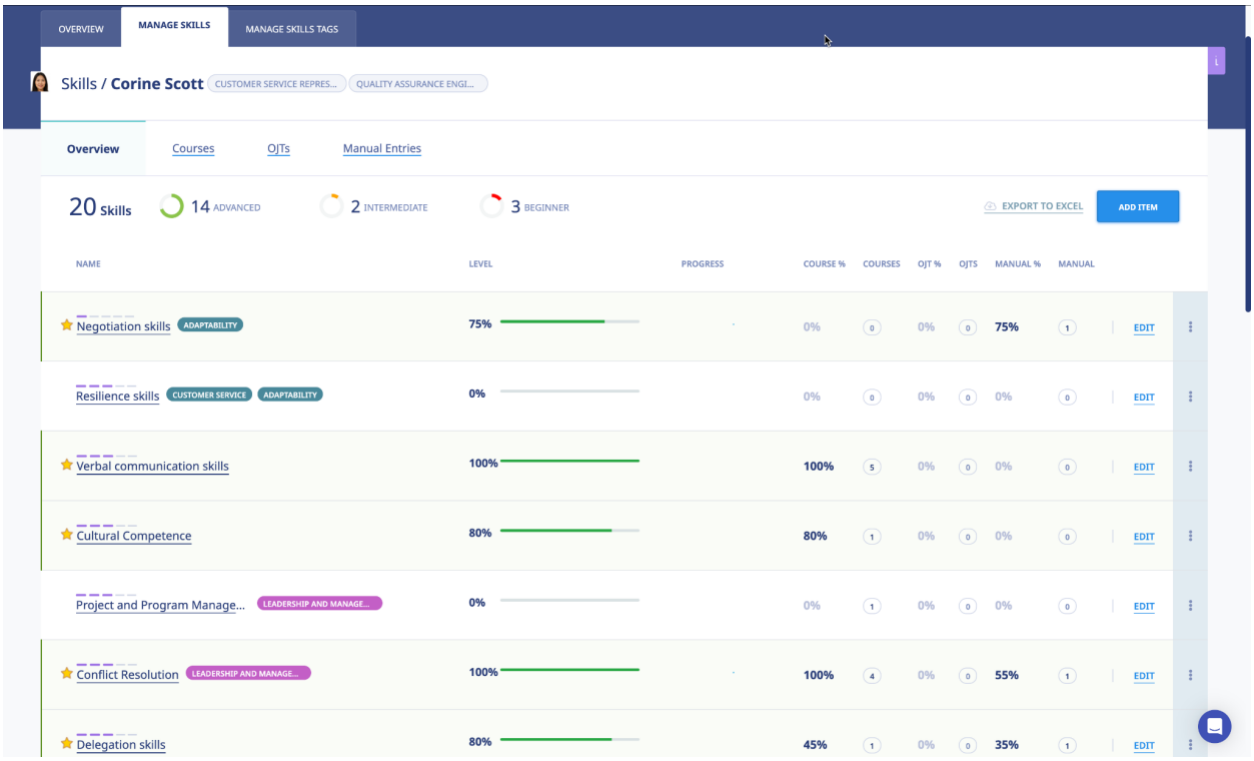
When adding new roles, you can customize the skill weight and levels to match your preferences.
The skills roles table provides details on current roles, weight, and users (users in this role currently assigned to the skill), as well as an option to edit or delete the current role.

Courses

Click the [Courses] sub-tab to see the courses currently associated with the skill. Click the course name to go to the completion report page of the current course.
Click the [Edit] link to go to the Skills Settings section of the course.

User Details

When a user's name is clicked, you go to the user details page in the skills system.



User Skills Overview

The user's skills overview page displays the user's activity as it pertains to earning skills. The page starts with the user's name and associated roles. Next comes the four sub-tabs for managing the user's skills: Overview, Courses, OJTs, and Manual entries. Each of these subtabs displays relevant information regarding the subtab.

Next, on the overview page, you can see the total number of skills the user has earned and a breakdown of the skills by skill level. Click each section to display the relevant skills.

Click the [Export to Excel] to download the user's skills activity. Click [Add Item] to add a skill to the user.

The data table shows information about Skills such as Name, Level, Progress, Course %, Courses, OJT %, OJTs, Manual %, and Manual. Click on data in skills table for additional information.

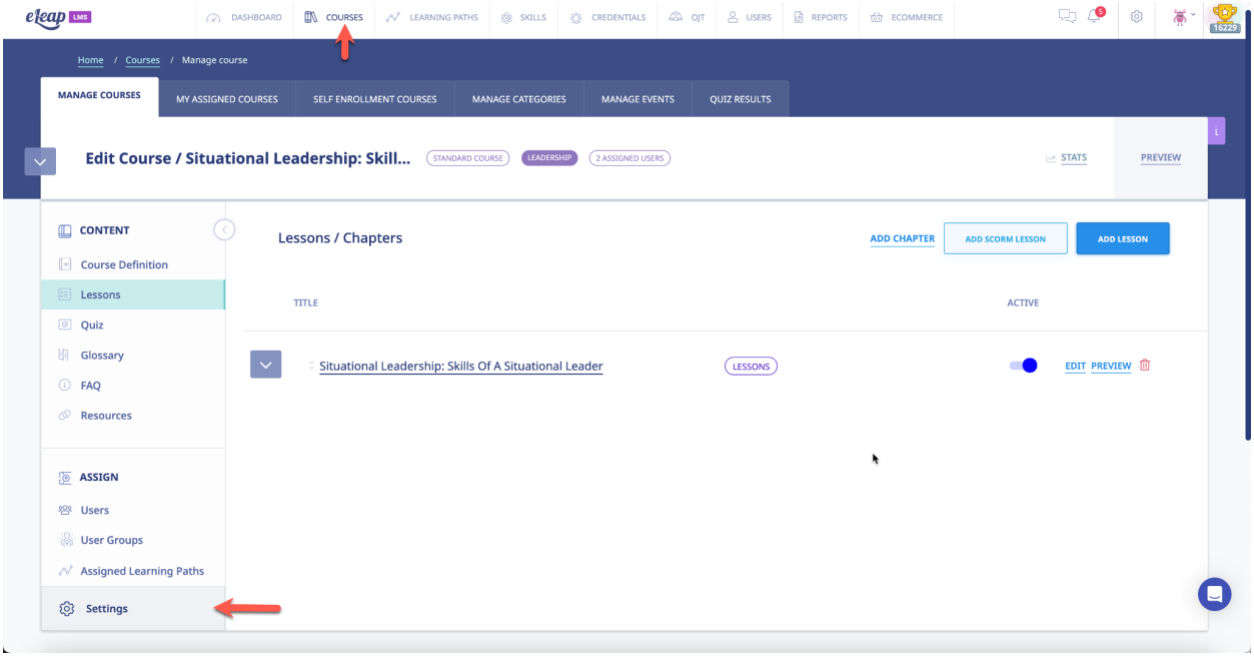
Skills Settings (in courses):

After creating your Skills Tags and your Skills, you will need to associate courses with the Skills you want to monitor and track. To do this, go to your Skills Settings in the course settings section. Please note that if your account does not have the Skills Module activated, you will not be able to see the Skills Settings in the course settings section.

In level mode: the course's Skills tab works differently. It shows a **Skill levels using this course** table and an **Add as level requirement** button instead of Attach New Skills and Attach New Roles. See Admin: Skills Levels, Set Level Requirements for a Skill.

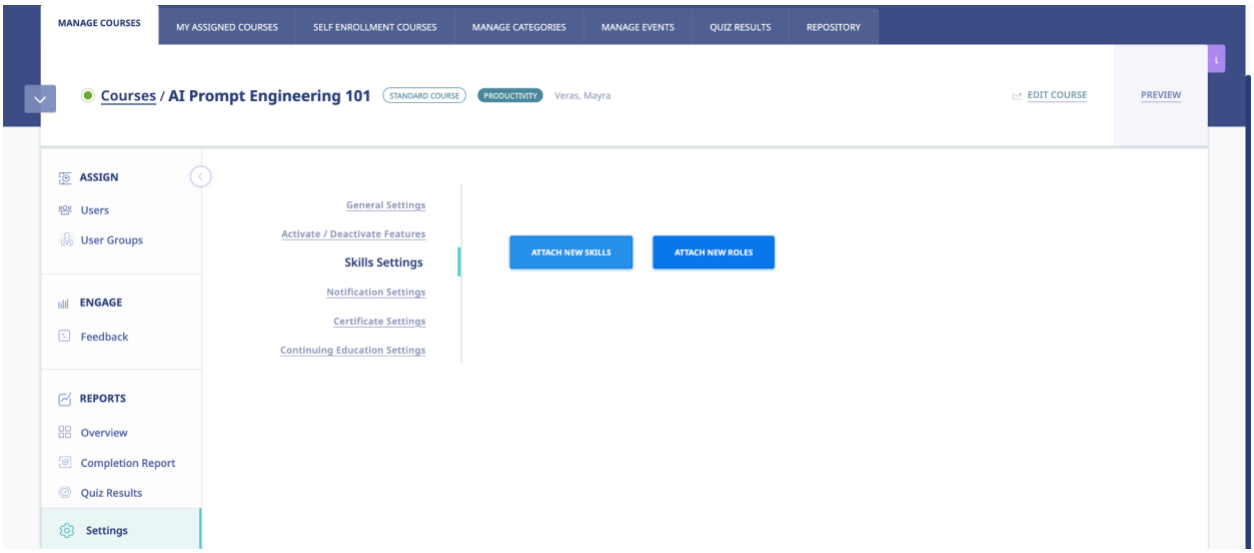
Settings:

Go to your [Courses] section and pull up a specific course you want to associate with a skill:



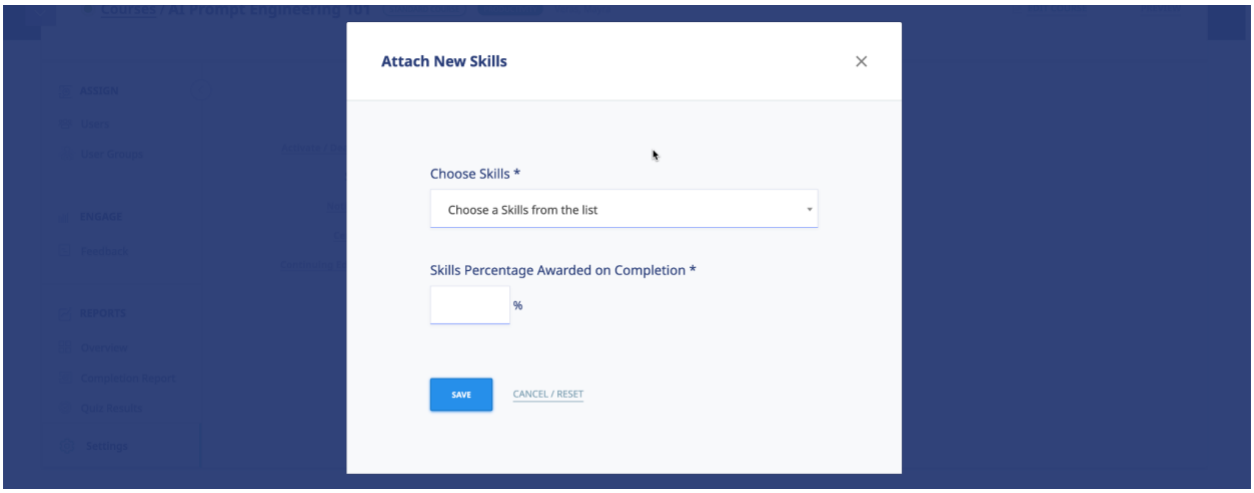
Skills Settings

From the [General Settings] section, click the [Skills Settings] link to see the current Skills Settings setup.

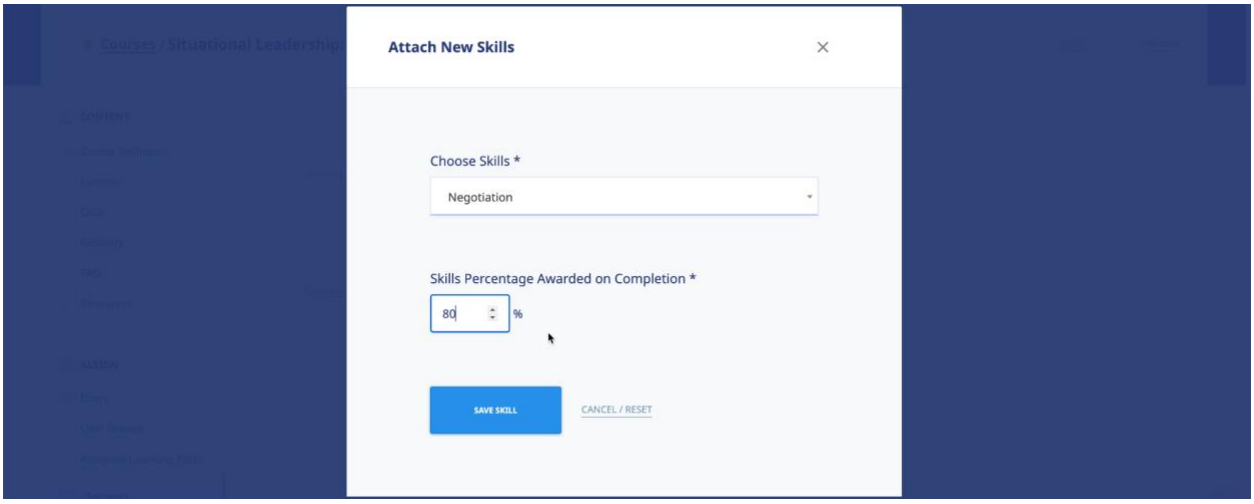


Attach New Skills

Then click the [Attach New Skills] button to attach this course to specific skills.



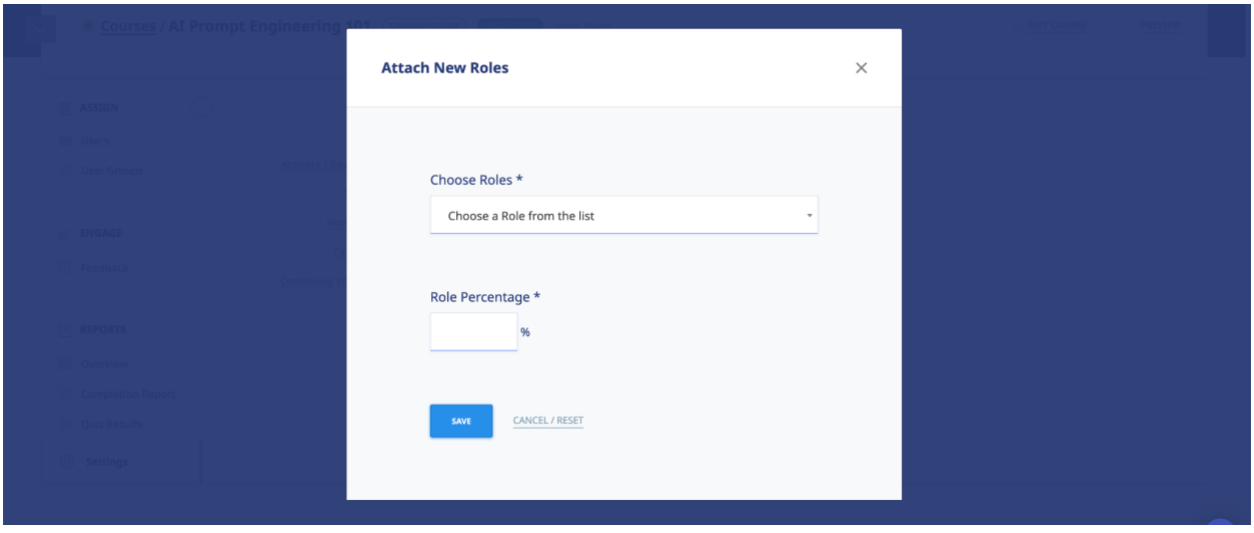
Select the right Skill from the dropdown list. If you don't see your required, it means it has not been created. Go back to the Skills Overview to add the skill before returning to the Skills Settings section. If your required Skill is present, select it and then enter the Skills Percentage Score to be awarded on course completion.



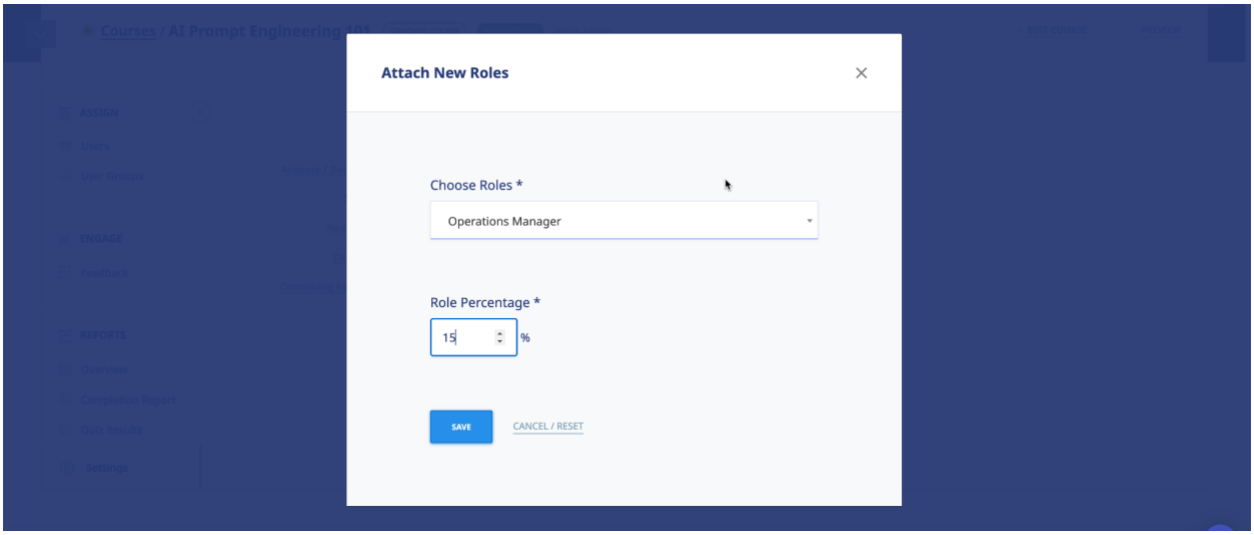
You can attach more than one skill to a specific course. If you need to attach more skills, click the [Attach New Skills].
Attaching skills to a course means you can't use the same course to attach roles. This is why the [Attach New Roles] button is disabled if you have attached at least one skill.

Attach New Roles

Attaching new roles to a course ensures that instead of all assigned users getting the skills attribution, only users of the attached role will be able to get skills attribution. This is recommended if the course is going to be assigned to different types of users including users who don't need to earn skills points for completing the course.



Once you select the relevant role, add the Role percentage points to be earned by users of the selected role. Click Save to add the role.



Note that you can continue to add additional roles to the course. Simply click the [Attach New Roles] to add additional roles.

Attaching roles to a course means you can't use the same course to attach individual skills. This is why the [Attach New Skills] button is disabled if you have attached at least one role.

Admin: Skills Levels

Skills Levels is a second way to measure skills in eLeaP. Instead of a score out of 100, each person holds one of five levels on a skill, and a level is recorded only when its requirements are complete and the required people have signed. This chapter covers everything an administrator needs to turn Skills Levels on, set it up, and manage it.

Prefer to watch? See the Skills Levels tutorial.

Note: Menu paths in this chapter use the default name Skills. If your account renames the module (for example, Skills Matrix), the menus and buttons change to match.

Percentage Mode and Level Mode

eLeaP can measure a skill in two ways. Each has its own strengths, and your account runs one mode at a time.

Mode	How it works	Best for
Percentage	Courses, OJT records, and manual entries each add points. The points build to a score out of 100, shown as Beginner, Intermediate, or Advanced.	A quick view of how much training each person has completed.
Levels	Each person holds one of five levels. A level is earned, not calculated: it is recorded the moment its requirements are completed and the required people have signed. Nothing is averaged and nothing is scored out of 100.	Proving that someone is qualified to do the job.

In level mode, each person holds one of these five levels. You can rename any level to match your

organization's terminology.

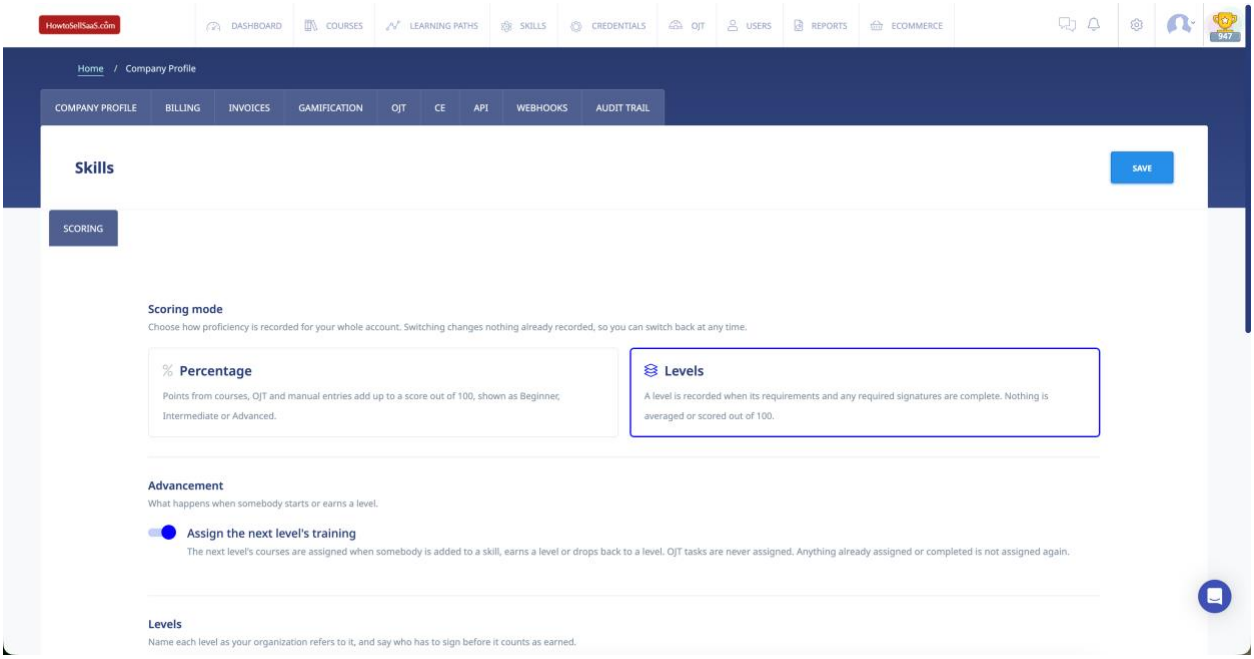
Level	Default name
0	Not Trained
1	In Training
2	Can Perform With Supervision
3	Qualified
4	Qualified Trainer

Note: Level mode is optional and reversible. Switching does not convert, move, or delete anything already recorded, so you can switch back and find your percentages exactly as they were.

Who can do what

- Only an **Administrator** can switch the scoring mode.
- Instructors can manage level requirements and templates, and add their own courses as level requirements from the course's settings.

Turn On Skills Levels



Level mode is set once for your whole account. You need an Administrator login and the Skills module enabled.

Switch to Level Mode

1. Click the gear icon (or your avatar) and open **Company Profile**.
2. Next to **Dashboard**, click the **Skills** button. You can also use **Skills > Settings**.
3. Under **Scoring mode**, click the **Levels** card.
4. Set up your levels (see Set Up Your Levels, below).
5. Click **Save**. You will see "The Skills settings have been saved."

Note: Don't see the Skills button? The Skills module is not enabled on your account, or you are not logged in as an Administrator.

What Changes on Screen

- Every skill screen shows a level instead of a percentage bar.
- The **Course %**, **OJT %**, and **Manual %** columns disappear.
- The Beginner / Intermediate / Advanced filter becomes a level filter.
- Adding people to a skill no longer asks for points, a weight, or a level breakdown.
- Manual entries are hidden. They are not deleted.
- The skill header shows how many people are on the skill instead of an average, and the **Progress** column on the Users tab is hidden.
- The overall score and the gold stars on the Overview are hidden.
- A course's **Settings > Skills** tab shows the skill levels the course counts toward.
- Everyone starts at Level 0. Nobody is given a level until they earn one.

Note: Your points are still in the system, untouched. Switch back to Percentage and every screen returns to exactly what it showed before.

Set Up Your Levels

The level settings are on the same page you used to switch modes, below the Scoring mode cards.

Assign the Next Level's Training

This single toggle controls automatic assignment.

- **On:** the courses the next level needs are assigned automatically when someone is added to a skill (Level 1's training), each time they earn a level, and when they drop back to a level. Anything already assigned or completed is not assigned again.
- **Off:** you assign each stage by hand. The per-level Auto-assign boxes are grayed out. They keep

their ticks and apply again when you turn the toggle back on.

Only course-type requirements (Course, Assessment, Trainer qualification) are assigned. **OJT tasks are never assigned**, because a trainer still has to do the on-the-job work and record it.

The Levels Table

Column	What it does
Name	What your organization calls this level. Leave blank to use the default.
Description	An optional note for administrators.
Required signatures	Who must sign before the level counts as earned: Trainee, Trainer, or both.
Next level	Auto-assign Level N. Whether this level hands out the next level's training automatically. Level 0's box covers people being added to a skill.

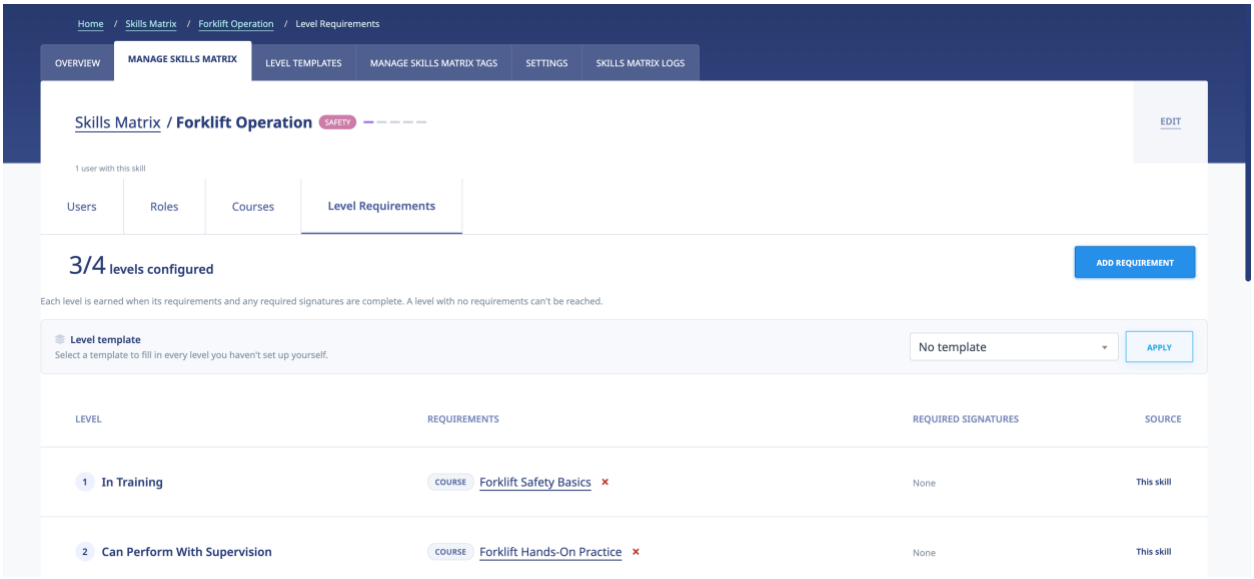
Out of the box, Levels 3 and 4 need both a Trainee and a Trainer signature, and Levels 1 and 2 need none. Level 0 has no signature options because everyone starts there. Hover over the info icons beside Required signatures and Next level for a short explanation of each column.

Note: A signature is not optional paperwork. It is the gate. If a level requires signatures, finishing the training is not enough. The level is not recorded until the signatures exist.

Good to know

- **Level 4 is never assigned automatically.** Its requirements become available, but nobody is enrolled in them without a decision.
- You can rename levels at any time. Renaming does not change who holds what.
- Clearing a signature checkbox makes that level easier to reach from that moment on. It does not remove levels people already hold.

Set Level Requirements for a Skill



A level with no requirements cannot be reached. Until you add them, everybody stays at Level 0 no matter how much training they finish.

Add a Requirement

1. Go to **Skills > Manage Skills** and click a skill.
2. Click the **Level Requirements** tab.
3. Click **Add Requirement**.
4. Choose the **Level** first, then the **Requirement type**, then the course. The number in brackets after each level, for example "Level 1 - In Training (1)," is how many requirements it already has.
5. Under **Apply to**, choose how widely it applies.
6. Click **Save Requirement**. For This skill only, you will see "The requirement has been added."

The tab lists every level and what it needs. Levels you have not configured read "Not configured - this level cannot be reached." To remove a requirement, click the red **×** next to the course name.

Requirement Types

Type	Accepts	Notes
Course	Standard courses only	The person must complete the course. Not offered on a level whose Trainer signature box is ticked.
Assessment	Observation Checklist courses only	For observed, countersigned work. The natural choice for a level that needs a trainer signature.
Trainer qualification	Standard or Observation Checklist	The train-the-trainer course. Only offered when Level 4 is selected.
OJT Task	An option of one of your OJT dropdown fields	Met by an OJT record with that task submitted by a trainer. Not offered on a level whose Trainee box is ticked.

Which Courses You Can Pick

The course list only shows courses that can satisfy the level you chose, and a gray line under the list tells you what it is filtering on. Type in the search box to find a course by name, course code, or course ID. Observation Checklist courses carry a small **OC** tag.

The level needs...	Courses listed
No signature	Active courses of the right type
The trainee's signature	Courses with **E-Signature Required** turned on
A trainer's signature	Courses with E-Signature Required on and set to **Multistep E-Signature**. Only Assessment is offered, because a Standard course cannot collect a trainer's signature.

A course or OJT task that is already a requirement on another level of the same skill (or template) is grayed out with "Already on Level N" and cannot be picked.

Note: Can't find a course? Check that it is active, that it is the right type for the requirement type you chose, and that its e-signature settings match what the level needs.

Why One Course Per Level

If the same course sat on several levels, finishing it once would satisfy all of them together and the

person would jump straight up the ladder. So each course, and each OJT task, can count toward one level per skill. Use a different course (or an Assessment) for each stage.

OJT Task Requirements

An OJT task is an option of one of your OJT dropdown fields, for example field **Task**, option **Reach Truck Practice**. When a level requires that task, the person reaches the level once they have an OJT record with that task that somebody else submitted for them. That submission counts as the trainer signing it off.

- The record must be submitted by an administrator, instructor, supervisor, manager, or coordinator. Records trainees enter for themselves are kept and listed as before, but they do not satisfy a level.
- OJT cannot collect the trainee's signature, so OJT Task is not offered on a level whose **Trainee** signature box is ticked. Out of the box, that is Levels 1 and 2.
- Tasks come from options of OJT fields of type **Dropdown**. No dropdown options means no tasks.
- Adding, editing, importing, or deleting an OJT record re-checks the person's level on the skills they are already on. It never adds them to a skill.
- Deleting the record takes the level away again, and adding it back restores it.

Apply One Requirement to Many Skills

Option	Effect
This skill only	Just the skill you are looking at.
Every Skill with a tag	Every skill carrying the tag you pick.
Every Skill in a role	Every skill attached to the role you pick.

Any skill that already uses that course on one of its levels is skipped, and the message tells you how many. Nothing is duplicated, so it is safe to re-apply.

Add a Requirement From the Course

1. Open the course, go to **Settings > Skills**, and click **Add as level requirement**.
2. Choose the **Skill** and the **Level**.
3. Choose the **Requirement type**. It only offers what fits the course.
4. Click **Save Requirement**.

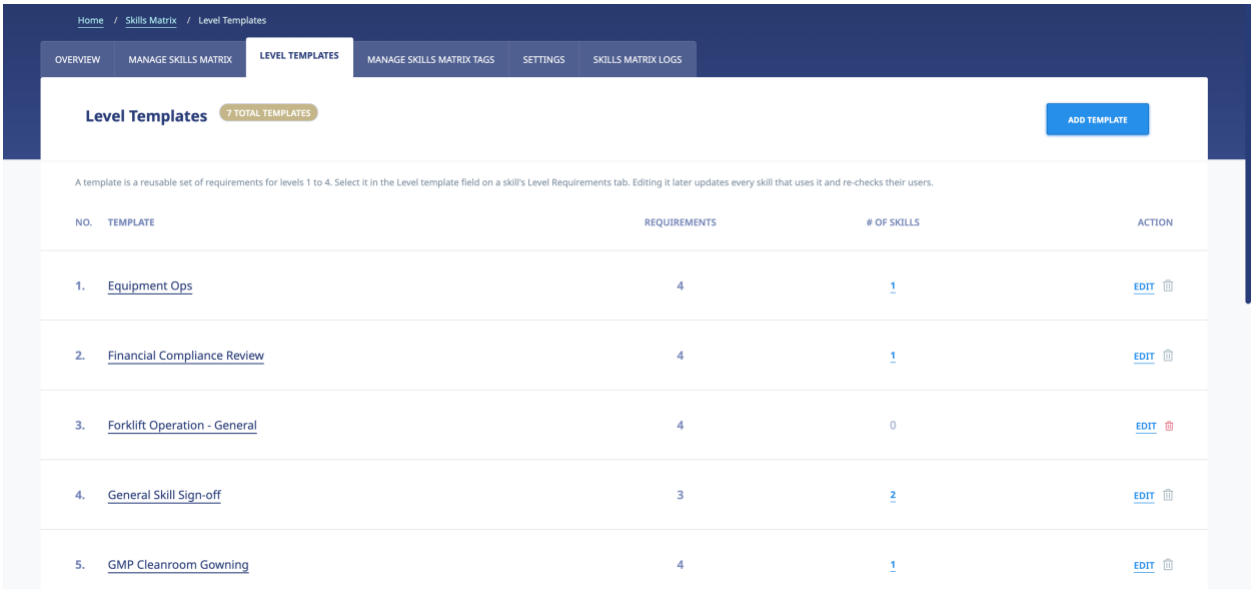
The **Skill levels using this course** table on that tab lists every level the course is a requirement on, with its Skill, Level, Type, and Source (This skill or Template). Percentage links from percentage mode are

listed separately and kept in case you switch back. The **Attach New Skills** and **Attach New Roles** buttons described in Skills Settings (in courses) are not offered in level mode.

Good to Know

- Requirements added on a skill are **overrides**. They beat anything a template says for that level.
- You do not also need to attach the course to the skill in the course's own settings.
- Adding a requirement does not go back and re-check people who already finished the course. They are assessed the next time something happens on that skill. To recognize existing completions right away, use a Level Template (see below).
- If a course is later changed so it can no longer satisfy its level (for example E-Signature is turned off), the requirement shows a red warning such as "Needs Multistep E-Signature." A yellow banner appears on the course's settings page, and deactivating the course tells you how many skill levels still need it. These are warnings, not blocks.
- Deleting a course removes it from every skill level and template that required it. A level left with no requirements reads "Not configured" again.

Level Templates



If many skills share the same progression, define it once in a Level Template.

Create and Use a Template

1. Go to **Skills > Level Templates**.
2. Click **Add Template**, give it a name, and save.

3. On the template, click **Add Requirement** and add requirements for Levels 1 to 4. The same course rules apply as on a skill.
4. Open a skill's **Level Requirements** tab, pick the template in the **Level template** field, and save.

Note: A template is selected by choosing it in the Level template field. Its name is not linked to a skill automatically, even if the two share a name.

The Level Templates list shows each template's requirement count and how many skills use it. The template page header repeats that ("Used by 1 skill"). Levels the template leaves empty read "Not configured in this template," and a skill using the template can still set that level itself. Use **Rename** to change the name, the red **×** to remove a requirement, and **Back to Level Templates** to return to the list.

Editing a Template Later

When you change a template, eLeaP updates every skill using it and re-checks every person on those skills. This is how someone who already completed the work gets their level. It happens in the background, so you will see "The requirement has been added. Skills using this template are being updated in the background." It is usually finished within a few minutes.

Template Rules

- A skill-level override always wins over the template, level by level. A template can supply Level 2 while an override supplies Level 1 on the same skill.
- The one-per-level rule covers templates too, for courses and OJT tasks. You cannot add a course or task to a template if a skill using it already requires it on a different level, and you cannot pick a template for a skill if the template uses one of the skill's own courses or tasks on a different level.
- A template or skill that already had the same OJT task on two levels before this rule existed is left as it is. Remove the task from one level with the red × to fix it.
- Removing the template from a skill leaves it with only its own overrides, and re-checks its people straight away. Levels that depended on the template's requirements drop.
- Switching a skill to a different template replaces the old template's requirements completely.

Deleting a Template

You can delete a template only when no skill uses it. Click the trash icon beside the template on the Level Templates list, or **Delete** on the template page. Its requirements are deleted with it. The icon is gray while any skill uses the template and turns red once none does. Pick another template (or none) on those skills first.

Worked Example: A Signed-Off Level 3

This example follows one setup from start to finish. Swap in your own skill, courses, team, and users. The steps are identical. The skill is **Forklift Operation**, the trainee is **Jane**, and her trainer is **Tom**, a supervisor of the **Warehouse Team** user group that Jane belongs to.

Level	Jane must...	Signatures
1 - In Training	Complete Forklift Safety Basics	None
2 - Can Perform With Supervision	Complete Forklift Hands-On Practice	None
3 - Qualified	Pass Forklift Practical Assessment, observed by Tom	Jane and Tom

Before you start: level mode is on with the default signature rules, and the three courses exist. Forklift Practical Assessment must be an **Observation Checklist** course, because that is the only course type a trainer can sign. Tom needs a Supervisor or Manager login.

1. **Put Jane in a group and make Tom its supervisor.** Go to **Users > User Groups**, open Warehouse Team, and add Jane as a member. On the group's **User Group Settings** tab, click **add new role**, tick Tom, and click **add selected**.
2. **Make the assessment collect two signatures.** Open Forklift Practical Assessment, go to **Settings**, turn on **E-Signature Required**, and set **E-Signature Type** to **Multistep E-Signature**. Tom (the Observer) signs first, then Jane (the Observee). Without this step the course is not offered as a Level 3 requirement.
3. **Assign the assessment to the team.** On the course's **Assigned User Groups** tab, click **assign new user groups**, choose Warehouse Team, and save. Jane will not see the assessment in her Courses list yet, and assigning it early does not make her Level 3 before she has earned Levels 1 and 2.
4. **Build the skill.** Create Forklift Operation under **Skills > Manage Skills**. On its **Level Requirements** tab add Level 1 (requirement type **Course**, Forklift Safety Basics), Level 2 (**Course**, Forklift Hands-On Practice), and Level 3 (**Assessment**, Forklift Practical Assessment).
5. **Add Jane to the skill.** On the skill's **Users** tab, click **Add User**, tick Jane, click **add selected**, and confirm. Jane starts at Level 0 and her first course is assigned automatically.

Jane's journey

- Jane completes Forklift Safety Basics. She moves to Level 1, and Forklift Hands-On Practice is

assigned to her.

- Jane completes Forklift Hands-On Practice. She moves to Level 2. eLeaP emails the supervisors, managers, and coordinators of her user group that an observation assessment is ready.
- Tom logs in with his own account, goes to **Users > Assessments**, finds Jane's row for Forklift Practical Assessment, and clicks **Start**. He completes the checklist and e-signs as the Observer. Jane is still Level 2, because Level 3 needs both signatures.
- Jane opens the assessment from her Courses list, reviews it, and e-signs as the Observee. She moves to Level 3 - Qualified.

Who can open an observation. A Supervisor can only open observations for courses that reach the trainee through a user group (or learning path) they supervise. A Manager can open observations for anyone in the groups they manage, however the course was assigned. An Instructor can only open observations on courses they created or are listed on. If you use an Instructor as the trainer, skip the group steps and add them in the course's **Instructors** field instead.

For each new trainee, put them in Warehouse Team and add them to the skill. Everything after that, including assigning the next course, recording each level, and emailing, happens automatically. Your remaining job is making sure their supervisor observes and signs at Level 3.

How Signing Works

Signatures are captured through eLeaP's existing e-signature, under the signer's own login. There is no separate signing screen for skills, and no way to upload a scanned signature. You choose who must sign for each level in the Levels table.

Signature	Where it comes from
Trainee	The person's own e-signature on the required course.
Trainer	The assessor's or observer's signature on that course.

- **The order does not matter.** If the person finishes first, the level is recorded when the last signature arrives. If a signature comes first, it waits and the level is recorded on completion. A signature-gated level is never awarded on completion alone.
- **Every requirement needs its signatures.** If a level has two required courses and needs a trainer signature, both courses need it.
- When someone has completed the next level's requirements but a signature is missing, their row shows **Waiting for signature**. Hover over it to see whose signature is needed.

Note: Do not use Set as Completed on a course that requires a signature. eLeaP fills in the trainee's

signature date automatically, which can move someone up a signature-gated level without them ever signing. Also, do not sign in as someone else to sign for them. Signatures are only valid under the signer's own login.

What Happens When Someone Earns a Level

1. The level is written to their record.
2. The change is added to their Level History.
3. If **Assign the next level's training** is on, the next level's courses are assigned in one bulk operation, skipping anything they already have. An Observation Checklist course is handled differently: the trainee is told their trainer will observe them, and the course only appears in their Courses list once the trainer has finished the observation and it is their turn to sign.
4. The trainee is emailed, and so is the instructor who owns the skill, but only the first time they reach that level. Getting a level back after a drop does not send the email again.

When a trainee completes the earlier levels and becomes ready for an Observation Checklist level, eLeaP emails the supervisors, managers, and coordinators of their user groups: "An Observation Assessment is ready for you to complete." The assessment itself can be assigned to the group ahead of time. The email is sent when the trainee is ready.

If someone already satisfies several levels, they are moved up through all of them at once, and each step is recorded separately.

Level 4: Qualified Trainers

Level 4 is the trainer qualification. It requires Level 3, plus whatever trainer-qualification requirements and observed, signed session you configure. It is never handed out automatically.

Anybody holding Level 4 on a skill becomes eligible to act as the trainer signer for that skill. Their role and user groups still decide whom they can sign for. The Level Requirements tab lists them in the **Qualified trainers** card, with a count and each person's photo and name. Click a person to open their skills overview.

Levels Can Go Down Again

If someone's training is reset, a level can drop. Examples are a course re-assigned for annual retraining, or an administrator using **Reset Completion Status** on the course's completion report. The requirement is no longer met, and their level drops straight away.

- Losing a lower level takes every level above it too. Losing a Level 1 requirement takes the person to Level 0.

- Completing the requirement again restores every higher level at once, without signing again.
- Nothing is erased. The current level reflects where they are now, their Level History keeps every move in both directions, and their earlier signatures stay on record.
- When someone drops back to a level and Assign the next level's training is on (with that level's Auto-assign box ticked), the courses for their new next level are assigned straight away. No "level reached" email is sent for a drop.

Manage People and Track Levels on a Skill

Add People to a Skill

1. Open a skill, go to its **Users** tab, and click **Add User**.
2. Find people with the search box or the **User Group**, **Access level**, and **Role** filters. Access level is the person's account type, such as Trainee or Administrator, not a skill level. People already on the skill are ticked and grayed out.
3. Tick the people (the selection is kept across pages), click **add selected**, and confirm. The message says how many were added.

In level mode there are no points, weight, or percentages to fill in. Everyone starts at Level 0, but eLeaP checks their level straight away, so someone who has already done Level 1's training is placed on Level 1 as soon as they are added. If Assign the next level's training is on and Level 0's Auto-assign Level 1 box is ticked, anyone who stays at Level 0 is assigned Level 1's courses at the same moment. The same happens however someone gets the skill: the Users tab, Add Item on a person's skills page, an OJT record with the skill attached, or a course or role that grants it.

You cannot give someone a starting level. They earn levels by completing requirements.

Remove People From a Skill

On the Users tab, click **remove** in a person's row menu, or tick several people and click **remove selected users**. A confirmation window shows how many are selected. Click **Remove** to confirm or **Cancel** to go back. Nothing is removed until you confirm.

Removing someone deletes their level and points on that skill, and their level history is no longer shown on the skill or in the Skills Logs. If they are added back later, they start again at the first level with a new history. People with a role or course linked to the skill may be added back automatically when that role is saved or the course is completed. Each removal is recorded in the Skills Logs with who removed them.

Manual Entries

A manual entry cannot change a level, because levels only come from requirements and signatures. In level mode manual entries are hidden. Existing entries are not deleted and return if you switch back to

Percentage. To record that someone has done the work, use an OJT Task requirement.

The Skill's Users and Courses Tabs

Users tab. Each row shows the person's level name with a progress bar and "Level N of 4." The course number is the count of the skill's required courses that are assigned to them or completed by them, and clicking it opens their course list filtered to this skill. The OJTs column counts the skill's OJT tasks they have a trainer-submitted record for. The per-person add (points) and Edit (weight) actions are hidden. A **History** button and a row menu with **Remove** remain.

Courses tab. Lists every course connected to the skill, including the courses its levels require, with a **Level requirement** tag. Courses nobody has completed show 0 users and N/A. A level requirement is removed on the Level Requirements tab, not here.

Read Someone's Level History

1. Open a skill and go to its **Users** tab.
2. Click **History** on the person's row. It opens in a new tab.

You see their current level and one row per change: When, From, To, Reason, and Actor. The Reason is "Level Earned" or "Requirements No Longer Met: [course name]." When a level loses all its requirements, for example its template is removed, the reason is just "Requirements No Longer Met." The Actor is the person whose action caused the change, **System** when nobody did (such as a background re-check), or **API** for API changes. The history is append-only. The Skills Logs page and its Excel export use the same wording.

Find People by Level

Every skill list has a level filter, labeled **Select a level**. It offers each level by name plus a **Below** option for each. **Qualified** shows exactly that level. **Below Qualified** shows everyone not yet at that level, usually the list you want for a compliance follow-up.

- On a skill's Users tab and on My Skills, the summary tiles count people (or the trainee's own skills) per level.
- On Manage Skills, the tiles count skills by their average level.
- Clicking a tile filters the same page to that level and keeps your other filters. With a level filter applied, the other tiles read 0.
- The Overview has a **Filter by level** dropdown that lists people holding at least one skill at the chosen level.
- Searching for a person accepts "Ho, Tracy," "Tracy Ho," "Tracy," or an email address. When nothing matches, the page says "No results found."

Managers and coordinators only see people in the user groups they manage. Opening a page for anyone else shows "Access denied."

Reports and Exports

- A person's skills export contains **Level** (the number) and **Level Name**, plus their course and OJT counts. The percentage columns and manual count are gone.
- The Overview export puts each person's level name in the cell for that skill instead of a percentage. Use **Export to excel** on the Overview. It contains the people on the page you are viewing, with your filters applied.
- The gold stars and the Users Overall Score box are hidden in level mode.

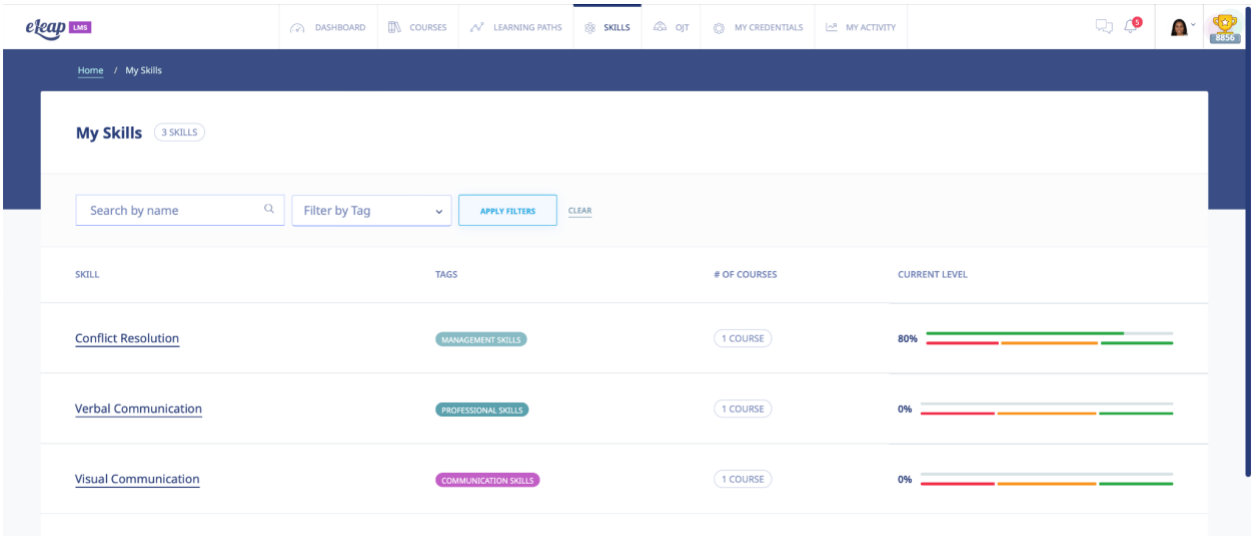
Troubleshooting and FAQ

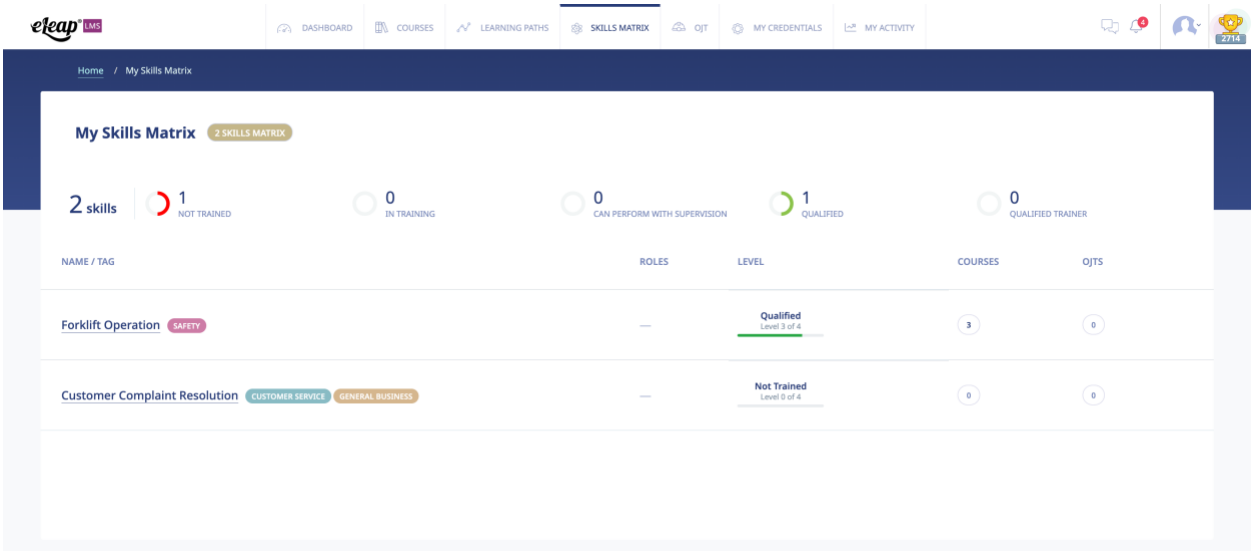
Question or problem	Answer
Does switching to level mode delete my percentages?	No. Nothing is converted and nothing is deleted. Switch back to Percentage and every screen looks exactly as it did.
Can some skills use levels and others use percentages?	No. The mode applies to your whole account.
Can I delete a level, or add a sixth?	No. There are always five levels, 0 to 4. You can rename them and leave levels unconfigured, which effectively shortens the ladder.
Everybody is stuck on Level 0.	Almost certainly the level requirements. Open the skill's Level Requirements tab. Any level reading "Not configured" cannot be reached.
My team finished the courses before I set up the requirements, and they are still Level 0.	Requirements added directly to a skill are checked the next time something happens on that skill. To re-check everybody immediately, put the requirements in a Level Template and select it on the skill.
Someone completed the course but did not get the level.	The level almost certainly requires a signature that is not there yet. For a trainer signature, the course must be an Observation Checklist course set to Multistep E-Signature, and the trainer must be able to open the trainee's observation. Remember that every required course on that level needs the signature, not just one.

Question or problem	Answer
A trainee reached a level and then dropped back.	A course they needed was reset or re-assigned, for example for annual retraining. They regain the level when they complete it again. Level History shows both moves, and the drop's reason names the course that lapsed.
A course I want is not in the Add Requirement list.	The usual causes: the course is inactive; it is an Observation Checklist course but you chose Course (use Assessment), or the other way round; or the level needs a signature and the course's E-Signature settings do not provide it. If it is grayed out with "Already on Level N," it is used on another level of that skill.
A requirement shows a red warning like "E-Signature is not required."	The course cannot collect the signatures that level needs. Turn on E-Signature on the course (Multistep for a trainer signature), or replace the requirement.
The trainer did not get an email.	The email goes to the supervisors, managers, and coordinators of the trainee's user groups when the trainee has completed the earlier levels and is ready for the assessment level. Check that the trainer is a supervisor, manager, or coordinator of one of the trainee's user groups.
The trainee cannot find the assessment in their Courses list.	This is expected. An Observation Checklist course appears in the trainee's list only after the trainer has finished the observation and it is the trainee's turn to sign.
Can our HR system award levels through the API?	It can trigger the training that earns them, but a level that requires a signature will not be awarded through the API. An API token identifies your company, not a person, and a signature has to be attributable to a named individual.
Can I give someone a starting level?	No. Everybody starts at Level 0 and earns levels by completing the requirements. eLeaP checks straight away when they are added, so existing completions count immediately.
What if I rename a level after people have earned it?	Only the label changes. Everybody keeps the level they hold, and their history re-reads with the new name.

Trainee: Skills View

Trainees in companies that have the Skills module will see the [Skills] menu in their account.





Filtering Options:



You can search by skill name or filter by Tag. Use the [Clear] to reset the filtering options.

Skill Details:

Trainees can click on the name of the skill to see details of the skill.

of Courses:

Click on the [# of Courses] to see which courses are available for the specific skill. This is the quickest way to complete courses to earn Skill points.

Current Level:

The current level of skill shows how the user is progressing in earning their skills.

Skills Levels: What Trainees See

If your account uses Skills Levels, **My Skills** shows each trainee's level on every skill instead of a percentage, and the summary tiles count the trainee's own skills per level. The level filter offers each level by name plus a **Below** option for each.

From a skill's **Courses** tab, each course is in one of three states:

State	When	What happens
Link	Already assigned to them	Opens the course.
Link (assigns it)	Belongs to a level they hold or the next level, but not yet assigned	Clicking assigns the course and opens it.
Locked	Belongs to a higher level	Not clickable. Hover to see "Unlocks at [level]."

A course already assigned some other way (by an administrator, a user group, or a learning path) opens as usual. An Observation Checklist course appears in the trainee's Courses list only after the trainer has finished the observation and it is the trainee's turn to sign.