

Skills

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Tags: 7.3

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Skills can be used to help ensure that only properly qualified operators perform specific types of work on the shop floor and can help ensure compliance with health and safety, and performance. Skills are related to manufacturing activity and can be time limited.

Note that permissions can also be used to limit user's access to certain functionality, but those are not time limited and are associated with system functionality rather than manufacturing activity.

The Skills page displays a list of Skills where you can choose to show *Only Active* or *Only Inactive* Skills.

You need to have Skill Types defined before you can Add/Edit a Skill.

Skill Types

Skill Types is used exclusively for reporting and organisation and does not impact functionality.

Add/Edit a Skill Type

1. Navigate to the **Skill Types** page and click **New**.
2. Provide a name and description in the **Add Skill Type** popup.

Add/Edit a Skill

1. Navigate to the **Skills** page and click **New**.
2. Complete the **Add Skill** input screen that is displayed.

Add/Edit Skill input screen

The following properties can be defined for a Skill:

Blue fields in the form are required and are flagged with an asterisk () in this document.*

Name*: The Skill name.

Description: The Skill description.

Skill Type*: Select the **Skill Type** from the drop down list.

Active*: Is the skill active (*Yes/No*).

Remove skill from referenced products, activities and issue types checkbox: When making a skill inactive, this will remove the skill from reference entities.

Is this Skill time limited checkbox: Check this box if the Skill expires needs to be reacquired after a period of time.

Time Limit Option: This field is active only if the **Is this Skill time limited?** field was checked. Select a time limit from the drop

down list. Values:

- *Expires x days after FIRST allocated*: The Skill is valid for a fixed duration of time.
- *Expires x days after LAST use*: This option applies if a Skill was not used for an extended period of time.

Number of Days before Skill expires: This provides the number of days to be applied for the option selected in the **Time Limit Option** field.

Properties

The Properties function allows you to provide additional information related to the Skill.

To add Property information to a Skill, you have to set up [Property Definitions](#) first.

Edit Property information

1. Navigate to the **Skills** page, select the Skill and click the **Properties** button.
2. Select the property you want to provide information for, and click **Edit**.
3. Add the information requested.

Assign/Unassign users to a Skill

You can Assign users from the **Skills** page or the **Users** page.

Skills page

1. Navigate to the **Skills** page and select the Skill you want to assign users to.
2. In the menu that is displayed above the list, click the **Users** button.
A list of users is shown with assigned users appearing at the top, highlighted in green if the Skill has not expired or red if the Skill has expired.
3. Select one or more unassigned users and click the **Assign Selected** button. Multiple row selection is supported using *Shift* and *Ctrl* keyboard functions.

Users page

1. Navigate to the **Users** page, select a user and click the **Skills** menu item.
2. Select the Skill and click the **Assign** button.

Assignment History

You can access the skills assignment history for a user by clicking the **Assignment History** button.

Set Expiry

You can expire a Skill for one or more users at any time. For example, you may want to expire a skill before it has reached its expiration date if a procedure that operators trained on changed and therefore recertification is needed.

You can Set Expiry from the **Skills** page or the **Users** page.

Skills page

1. Navigate to the **Skills** page and select the Skill you want to expire for one or more users.
2. In the menu that is displayed above the list, click the **Users** button.
A list of users is shown with assigned users appearing at the top, highlighted in green if the Skill has not expired or red if the Skill has expired.
3. Select one or more assigned users and click the **Set Expiry** button. Multiple row selection is supported using *Shift* and *Ctrl* keyboard functions.
4. In the **Skill Expiry Edit** popup, provide the date you want the Skill to expire.

Users page

1. Navigate to the **Users** page, select a user and click the **Skills** menu item.
2. Select the skill and click the **Set Expiry** button. In the **Skill Expiry Edit** popup, provide the date you want the Skill to expire.

Skills Matrix

The Skills Matrix shows everyone's assigned skills and whether they are active or inactive.

Skills Matrix

File Home View

Export < << < 1 > >> Parameters

Skill Type	<input type="text" value="Jai Test, Mechanical, System"/>	Skill	<input type="text" value="Jai Test, Expired Skill, Drilling"/>
Default Department	<input type="text" value="(All)"/>	Default Team	<input type="text" value="(All)"/>
User Group	<input type="text" value="(All)"/>	User Name	<input type="text" value="(All)"/>
Expire in X days	<input type="text" value="30"/>		

Legend	Current	Jai Test		Mechanical			
	Expires in X days	Expired Skill	Jai Test	Cutting	Drilling	Screwing	Test Skill
Expired							
User/Skill	Expired Skill	Jai Test	Cutting	Drilling	Screwing	Test Skill	
					01/04/2023		
			04/06/2034				
					14/04/2023		
				05/07/2024	19/12/2023	22/05/2024	
				05/07/2024			
				13/03/2034			
				05/08/2033			
				07/08/2033	24/10/2023		

The Skills Matrix has a column for every Skill and a row for every person. Active skills are shown in green and expired skills in red.

You can specify the days in the **Expire in X days** field to highlight in yellow, the users who will expire within that number of days. The Skills Matrix is a paginated report. Read more about [Paginated Reports](#).