

## Skills and Assessments

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## POKA: Creating and Attributing Skills

### Getting Started with Skills

**Skills can only be created** in the **Poka** Web application.

- Global Admins, Administrators, and Users with the Skills Manager permission can create, edit and delete skills.

### Skills Settings

**Assessments are not an “action”** like exams are. They are meant to be used by supervisors **to walk through questions/steps/processes** and have the employee “sign off” on a skill set.

- Skills: are checked off as they are mastered
- Supervisors build a team in POKA and assign skills to employees

### Skills Attribution

In Poka, attribution refers to the assignment of skills to individuals. There are **2 ways to attribute skills**: Automatic and/or Individual.

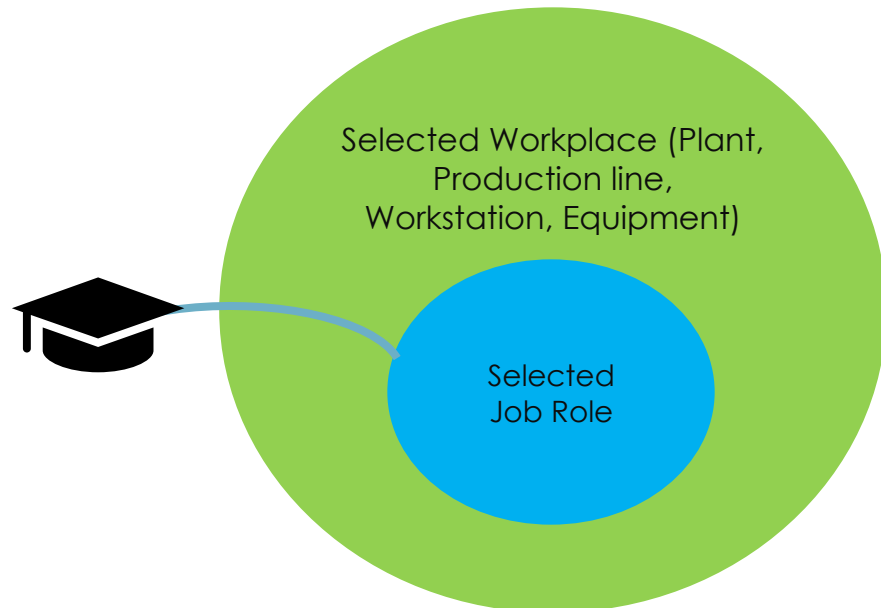
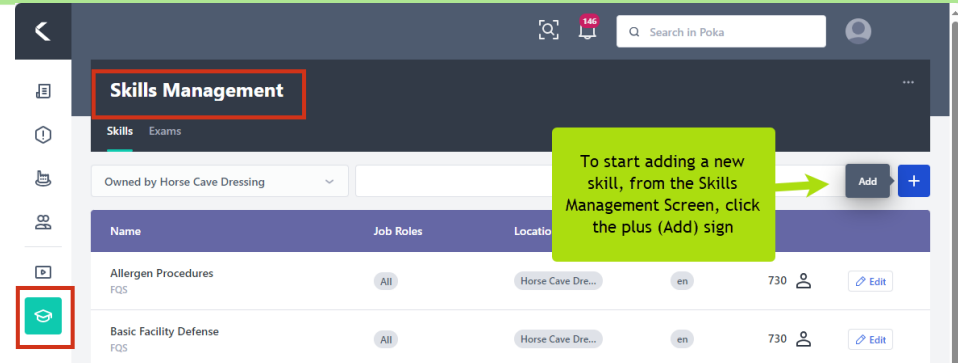
A skill can be **automatically attributed to users**. To do so, the skill must be:

- Attributed** to a **workplace location AND**
- To some or all the **job roles that the skill would apply**

Any user with one of these job roles and locations as their workplace in their profile will be required to complete this skill.

## Skills Reference Guide

### Double-Click Images to Enlarge



### Example of a Skill Attribution?

A Lock Out/Tag Out skill needs to be completed by all employees of the Chicago plant who have the job roles of:

- Operator
- Maintenance Supervisor
- Health & Safety Manager
- Mechanic

(total of 4 job roles)

Automatic Attribution
Reset

*i* This skill will be automatically attributed to current or future users who match these settings.

**Targeted Users**  
Define whether this skill will be attributed to all users assigned to selected workplaces, or only to users with specific job roles within the workplaces.

☐ All users assigned to selected workplaces
☒ Only users assigned to selected workplaces and with specific job roles

**Workplaces**

Plants

Q Search to add

Chicago

Division 1

**Job Roles**

Q Search to add

Operator

Maintenance Supervisor

Health & Safety Manager

Mechanic

## Global Skill Targets

A Global Skill Target defines the overall expected proficiency level for a Skill. It is **used by Skill Managers and Administrators** to **communicate expectations** for the skill and to **provide updates** to teams on the Knowledge requirements for that skill. **Only one Global target** can be **defined for a skill** at any time.

## Individual Skill Targets

adfasdff


## Adding Skills

1. **Select English** from the Language drop-down.

# Lock out/Tag out


Health & Safety

Basic



**Kevin Miller**  
Human Ressources Manager


Endorse




1/4 - Has basic knowledge  
Samuel Brown · Sep 13, 2021

2/8

A visual summary of the Global Target for the skills is now visible for the user and Skill Manager.

Self-Evaluation: 

Global Target: 

3/4 - Can perform all tasks  
Global Target

## Add Skill

Help ?

Language\*

English

Select

English

## Double-Click Images to Enlarge

### Select a skill level (optional)

#### 2. CATEGORY

- Select a **Category** (required) from the drop-down menu.
- Select a Subcategory (optional)

#### 3. LEVELS

- **Levels indicate** skill levels such as Basic or intermediate.
- **Skill proficiency Levels** should match your internal process.
- **Skills levels** can be customized.
  - Levels are useful to indicate to the users if the skill is for beginners or experts. Custom skills levels can be added from the admin section.

#### 4. DURATION

- Write the **expected duration to complete the training program** (hours/minutes). An example of use for this information could be for audits to show the total employee training hours.

#### 5. OWNERSHIP TARGET

- **Select an Ownership Target** (Who/what group owns the skills and revisions) – select Horse Cave Dressing
- Based on endorsement levels
- Sets the ideal skill level for all users

The screenshot shows the 'Add Skill' form with the following fields and callouts:

- Callout 2:** Points to the 'Category' dropdown menu in the 'Settings' section, which is currently set to 'Poka - official training courses'.
- Callout 3:** Points to the 'Level' dropdown menu in the 'Settings' section, which is currently set to 'Select'.
- Callout 4:** Points to the 'Training Duration' section, which has input fields for '1' hours and '15' minutes.
- Callout 5:** Points to the 'Ownership' dropdown menu, which is currently set to 'Select'.

A green callout box with the text 'Ownership is based on endorsement levels' points to the 'Ownership' dropdown menu.

## 6. SKILLS REVISION

- If skills need to be **reassessed after a certain period, select the frequency** as to when the skill will expire for users.
- Allow Endorsers to Set Individual Targets (optional)
- Users will receive a notification in advance of the revision time determined from the date of the last endorsement.

**For Example:**

Skill Revision Delay	First Notification	Second Notification
1 month	1 week before	1 day before

## 7. ENDORSEMENT OPTIONS

- Under the Endorsement section of the skill edit, you can configure:
  - Self-Evaluations
  - eSignatures (if applicable)
  - Who can endorse the skill
- When a new skill is created, **endorsement is enabled by default for Team Managers and Supervisors**.
- A Designated Endorser **needs no additional permissions** (such as supervisor, or team manager) to endorse a skill.
  - Endorsers can be added to specific skills.
- When **Automatic Endorsement** is enabled the **default for configuration is Require all steps to be completed before requesting an endorsement**.
  - If Automatic Endorsement is **NOT enabled**, any of the configuration options can be chosen.

*NOTE: It is optional to have a Team Manager endorse a skill, but **every skill requires endorsement** from either a supervisor, a designated endorser or both.*

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6

### Endorsement Options

Revision Needed

Never

Never

Every Month

Every 3 Months

Every 6 Months

Every Year

Every 2 Years

Every 3 Years

Every 4 Years

Every 5 Years

Skill Revisions: Choose the frequency that skills need reassessment

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### Endorsement Options

Revision Needed

Never

Activate Automatic Endorsement

Allow users to mark their skill as completed when they finish all its steps. Once they do, they will be automatically endorsed at the predefined level. Manual endorsement will still be possible.

Automatic Endorsement Level

3/4 - Can perform all tasks

Configuration

☒ Require all steps to be completed before requesting an endorsement

☐ Allow Users to Self-Evaluate

☐ Require eSignature on Endorsement

### Endorsement Permissions

Authorized Endorsers

☒ Supervisors Only

☐ Designated Endorsers Only

☐ Designated Endorsers & Supervisors

Additional Endorsers

☒ Team Managers

- **MULTIPLE ENDORSERS**

- Trainees can select which endorser(s) to notify when requesting endorsements.
- Remember, an endorsement is an evaluation confirming a user's ability to perform the complete skill.
  - Each skill has one point of endorsement
  - There are **5 levels of endorsement**, represented though a circle.
  - The **level descriptions** are defined by a Global Admin.

0/4 - Cannot do

1/4 - Has basic knowledge

2/4 - Can perform basic tasks

3/4 - Can perform all tasks

4/4 - Can teach all tasks

## Double-Click Images to Enlarge

### Request Endorsement

Several people can endorse you on this skill. Please select those to whom you wish to send the endorsement request.

#### Designated Endorsers

	Nathan Clark CI Coordinator	<input type="checkbox"/>
	Jeff Lam Operator	<input type="checkbox"/>

#### Supervisors

	Patricia Gilbert CEO	<input type="checkbox"/>
--	-------------------------	--------------------------

Cancel Request Endorsement

### Lock Out / Tag Out

Operations Intermediate

Angélique Harbec  
Operator

Request Endorsement

This skill has not been endorsed yet 4/4

Self-Evaluation: ▼

EXAMPLE: A trainee has completed all steps of a skill.

1. She requests an endorsement
2. Her Poka supervisor will endorse her

### What are Step-by-Step Assessments?

The Step-by-step assessment **enables supervisors and trainers to track the progress of a skill and assess specific steps inside a training program**. This is a useful method for determining the areas of training that users and their supervisors should concentrate on.

**Double-Click Images to Enlarge**

### Understanding Assessment Purpose/Use

Assessments are **not an “action”** like exams are. They are meant to be **used by supervisors to walk through questions/steps/processes** and have the **employee “sign off”** on a **skill set**.

- Skills: This is a list that is checked off as skills are mastered
- Supervisors will build a team in POKA and assign skills to employees

**An assessment is a point of validation in a skill and** can be added at any step of the skill during its building.

- **2 levels:** Mastered or Not Mastered

**Example:** Step 7 of a Lock out/Tag out skill requires that the trainee perform a Lock out/tag out procedure while being audited by the production supervisor. Once completed successfully, their supervisor can change the status of the assessment from **"To Be Assessed"** to **"Mastered"**.

7. Audit on the shop floor by production supervisor

Assessment

To Be Assessed

The auditee must master all steps of the standard procedure

### How to Set Up and Use Assessments/Skills Evaluation

- The assessment criteria can be included in each text box and are visible to **anyone** who has access to the skill.
- Each assessment box has **3 different statuses**:
  - To be assessed
  - To be mastered
  - Not mastered
- **Statuses can be changed or reset** by:
  - an **administrator**
  - a **team manager**
  - the **employee's supervisor**
- A **date stamp** and **assessor's name** are displayed under each assessment



## Skills Assessment Example

When assessing skills supervisors/managers need to identify skills that directly pertain to a task/process/activity etc.

- Skills are a part of **self-directed training programs** that are attributed or assigned to employees and **endorsed by** the employees' **Poka supervisor** OR a **user with special rights** to **evaluate the employees' ability to perform** the complete **skills**.

Double-Click Images to Enlarge

**Official Poka Training - Skills Basic Training and Creation**  
Poka - official training courses

**Training Program**

Users

Information

Languages

**1. IMPORTANT**

In order to access all the content in this skill you must first log in to Poka and access the Help Center.  
This creates the link required and only needs to be done once.

**2. At the end of this training session, you will be able to:**

- Understand the functionalities associated with Skills and Team Management
- Create the structure of your skill in Poka using the Skill Reference sheet
- Automatically attribute targeted skills to your employees using the Skill Matrix Sheet

**3. Building Blocks of a Skill Step in Poka**

In Poka, a skill is a self-directed training program attributed or assigned to employees and then endorsed by the employees' Poka supervisor or a user with special rights to evaluate the employees' ability to perform the complete skill.  
Each skill step can include any of the following as content:

- Work Instruction
- Troubleshoot
- Exam/Assessment
- Video/Picture
- Text

Skills can include any of the items on the right.

## Understanding Adding and Managing Skills/Assessments

### Create Skills

In Poka, a skill lays out the steps you need to learn and confirm the skills and knowledge for a task. It can be approved by your supervisor with different mastery levels.

In Poka, a skill outlines the steps needed to confirm/acquire and validate the skills and knowledge associated with a task and can be endorsed by an employee's supervisor with different mastery levels.

OPTIONS for text

In Poka, a **skill outlines the steps needed to acquire and validate the skills and knowledge associated with a task** and can be endorsed by an employee's supervisor with different mastery levels. A **user with administrative or skill management rights** sets up skills.

### Attribute Skills

Skills are **assigned according to the employee's workplace** (as set up through the Training Access section of a user) or **their workplace and their job role** (e.g., operation specialist). A skill is **assigned during the skill's configuration**.

In Poka, attribution refers to **the assignment of skills to individuals**.

**There are 2 ways to attribute skills:**

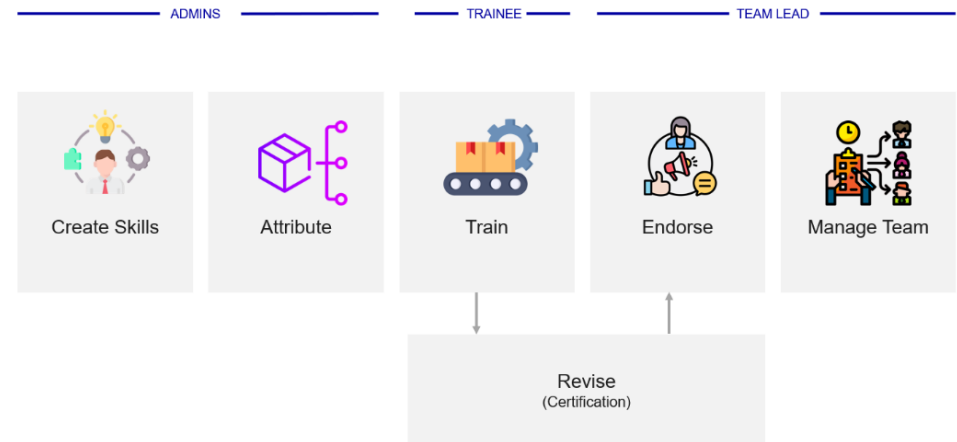
Automatic and/or Individual

### Skills Steps can Include

- A text description
- Document
- Image
- Video
- External link
- Link to Poka content such as work instruction or troubleshooting
- Assessments
- Exams

### Endorsement and Revision

## Double-Click Images to Enlarge



Automatic Attribution
Reset

*This skill will be automatically attributed to current or future users who match these settings.*

**Targeted Users**  
Define whether this skill will be attributed to all users assigned to selected workplaces, or only to users with specific job roles within the workplaces.

☒ All users assigned to selected workplaces
☐ Only users assigned to selected workplaces and with specific job roles

**Workplaces**  

Plants

Search to add

Chicago Americas

Skills **must be endorsed** by **one of the user's supervisors**. To ensure that all skills are up to date, **some may require to be reviewed frequently**. An administrator or a Team Manager can also endorse employees.

### Team Management

Supervisors can **manage their team's membership** and **must endorse** their **team members' skills**. Teams are created by administrators, team managers, or the supervisors themselves.

To **make a user a team supervisor**, you must navigate to:

*Administration page > Colleague List sub-section > Permissions screen for the target user > check the "Supervisor" option.*

[Skills Features Overview](#)

## Getting Started Adding Assessments

Assessments are added as a content type during **the skill creation from the skills' management panel**. They can be inserted anywhere and as many times as needed in the training program.



**NOTE:** Global admins, admins, supervisors, and team managers can do the assessments of the skills they are allowed to see.

### To Add an assessment

1. **Click the Skills Tab** on the left menu.
2. **Choose a subject** such as Food Fraud (this is what will be used as an example for this document) to start adding an assessment.
3. **Click the ellipsis** (three dots) in the upper right and select **Edit**.
4. **Select the Content – English tab** on the left.

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The screenshots show the following steps:

- Skills Management Panel:** The 'Skills' tab is selected in the left menu. A list of skills is shown, including 'Allergen Procedures', 'Basic Facility Defense', 'Critical Control Points (CCPs)', 'Food Fraud', and 'Food Safety Standards'. A green callout box labeled '1' points to the 'Skills Management Tab/Menu'.
- Select a Skill:** The 'Food Fraud' skill is selected from the list. A green callout box labeled '2' points to the skill name with the text 'Select a Skill to add an assessment'.
- Edit Skill:** The 'Food Fraud' skill detail page is shown. The ellipsis menu in the top right is clicked, and the 'Edit' option is selected. A green callout box labeled '3' points to the ellipsis menu with the text 'Click the Ellipsis to edit the skill.'.
- Edit Skill - Content Tab:** The 'Edit Skill' page is shown. The 'Content - English' tab is selected in the left menu. A green callout box labeled '4' points to the 'Content - English' tab with the text 'Select Content - English'.

5. Click the **Add Content** button.

**Edit Skill** Help

Information

Content - English

**English**

Skill Name\*

Food Fraud

1. Food Fraud: Introduction - Alchemy Training

Step Title\*

Food Fraud: Introduction - Alchemy Training

**Add Content**

+ Add Training Step

Delete Cancel Publish

Click Add Content

5

6. From the **pop-up** menu **select Assessment**.

**Edit Skill** Help

Information

Content - English

**English**

Skill Name\*

Food Fraud

1. Food Fraud: Introduction - Alchemy Training

Step Title\*

Food Fraud: Introduction - Alchemy Training

**Add Content**

+ Add Training Step

Delete Cancel Publish

Select Assessment

6

Exam

Work Instruction

Troubleshoot

Text

Media

Document

External link

**Assessment**

## Double-Click Images to Enlarge

7. Enter the **assessment criteria**
8. Once you Click Publish you will see the **assessment** has been **added to the Skill**
9. **Sample of an Assessment** and the skills for the assessment

7

**Edit Skill**

Information

Content - English

English

Skill Name\*

Food Fraud

1. Food Fraud: Introduction - Alchemy Training

Step Title\*

Food Fraud: Introduction - Alchemy Training

Assessment \*

☒

Add Content

+ Add Training Step

Delete Cancel Publish

After selecting Add Content>Assessment you will see the Assessment added.

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4. Practical Tasks and Activities

Perform QCC P2P handover

☐ 1. Receive shift handover from previous shift  
2. Fill out CPD in Weever  
3. Communicate shift performance with oncoming shift  
Not read yet

Participate in CP1 Meetings

☐ 1. Communicate Quality issues  
2. Follow up as needed  
3. Communicate support as needed  
Not read yet

Complete role trainings

☐ 1. Site Safety Awareness training  
2. GDSN Audit training  
3. GMP / SS training  
4. WINSPEC training  
5. Metal detector setup & troubleshooting training  
6. Qualified individual (Quality related documents)  
7. QCC Concession awareness training

Here is a sample of an assessment and the skills needed to fulfill the assessment

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