FACTBIRD

## USER GUIDE | Knowledge Excellence

factbird.com
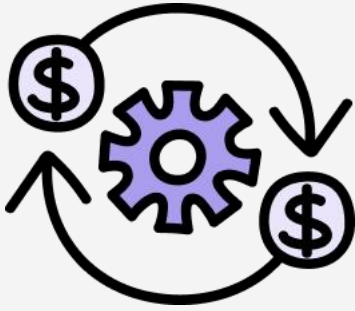
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Training and Skills Management

What is Training and Skills Management

Training and Skills Management in Factbird Knowledge Excellence provides a systematic approach to workforce development for sustainable change, supporting skill development from onboarding to upskilling and ensuring the right skill profiles are available to meet production demands.

1

Access Training and Skills Management

1. On the menu, click on "**Learning".**
2. Three are three tabs:
   a. "**LEARNING ACTIVITIES**": New training content (learning activities) can be created and updated digitally. All created training content will be listed here.
   b. "**SKILLS**": You can define skills by associating training content with them. For example, operating the filler requires the completion of two specific training content (learning activities).
   c. "**SKILL MATRIX**": You can associate skills with individuals. For example, specifying which employees need to be enrolled in specific skills. It then provides an overview of employee and their skill attainment status.
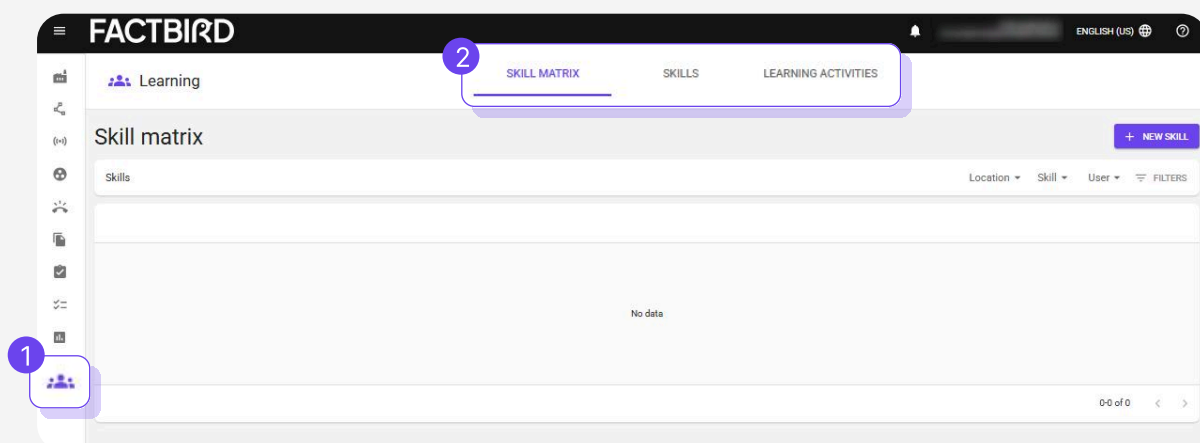
2

Create training content (learning activities)

1. Click on the "**LEARNING ACTIVITIES**" tab.
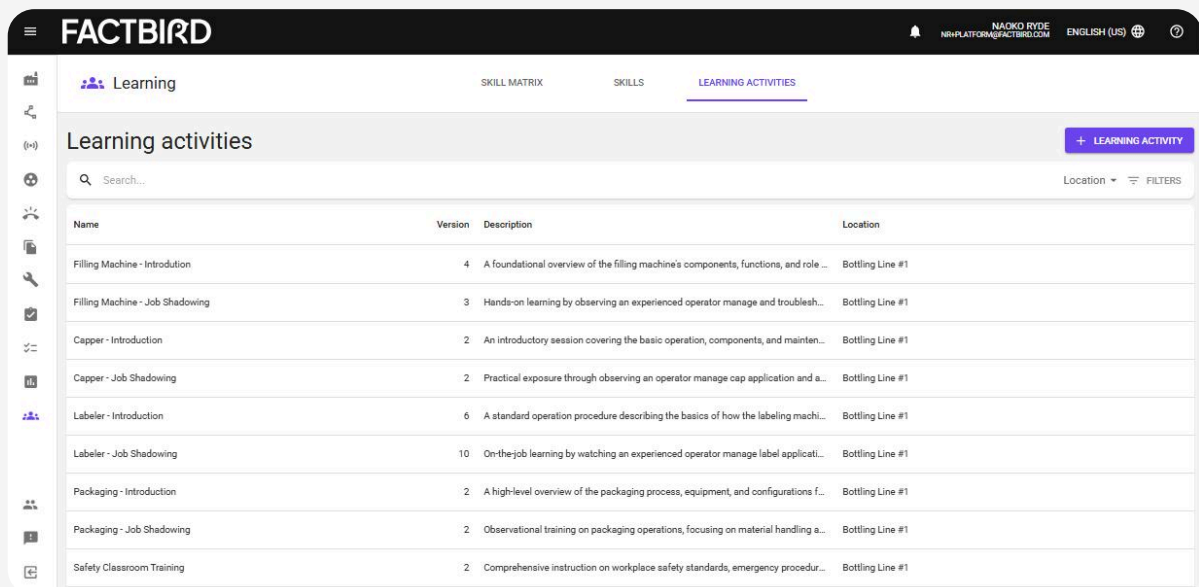2. Click on the "**+ LEARNING ACTIVITY**" button.
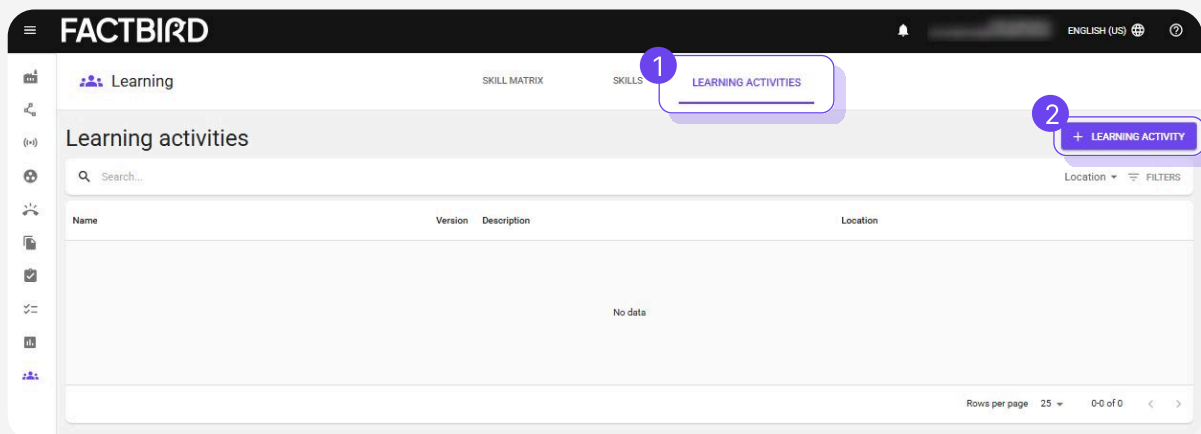
3. Fill out the **"General information**":
   - Enter the "**Title**" and "**Description**".
   - Select the "**location**" where the training content will be applicable.
   - Slide the toggles for "**Require start & end date**" and "**Validity period**" if needed.
4. Write the content in the editor, attach links, images, and videos if needed. Links can be to external systems, such as SharePoint or YouTube, when linking existing training content.
5. Click "**SAVE**".
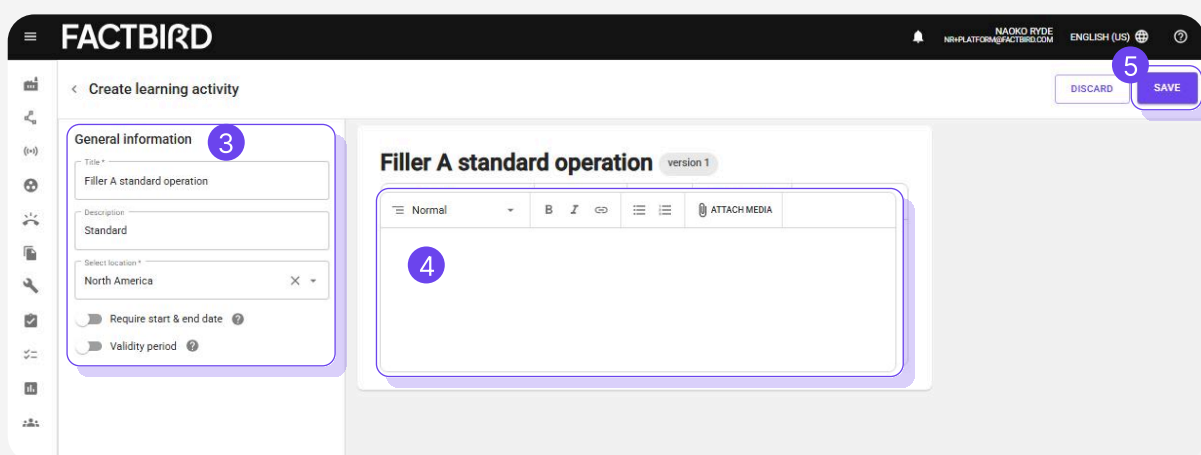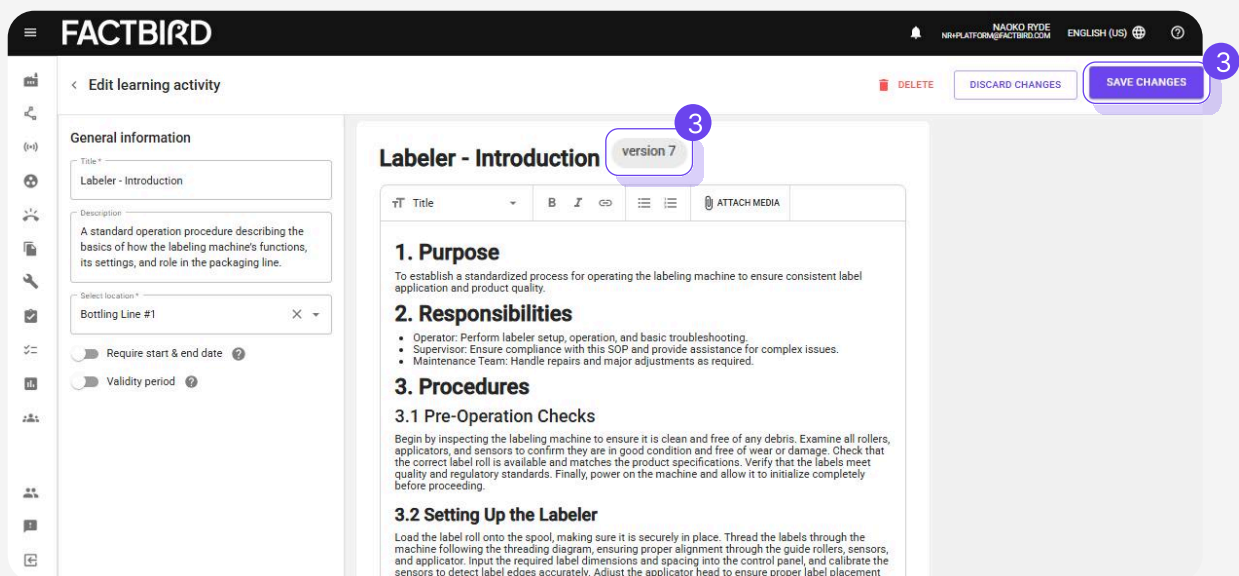
3 Update training content (learning activities)

1. Created training content will be displayed in the list.
2. Clicking on the list opens the content editor.

3. Update the content and click "**SAVE CHANGES**", which will mark it as the next version.

4

Associate training content (learning activities) with skills

1. Click on the "**SKILLS**" tab.
2. Click on the "**+ SKILL**" button.
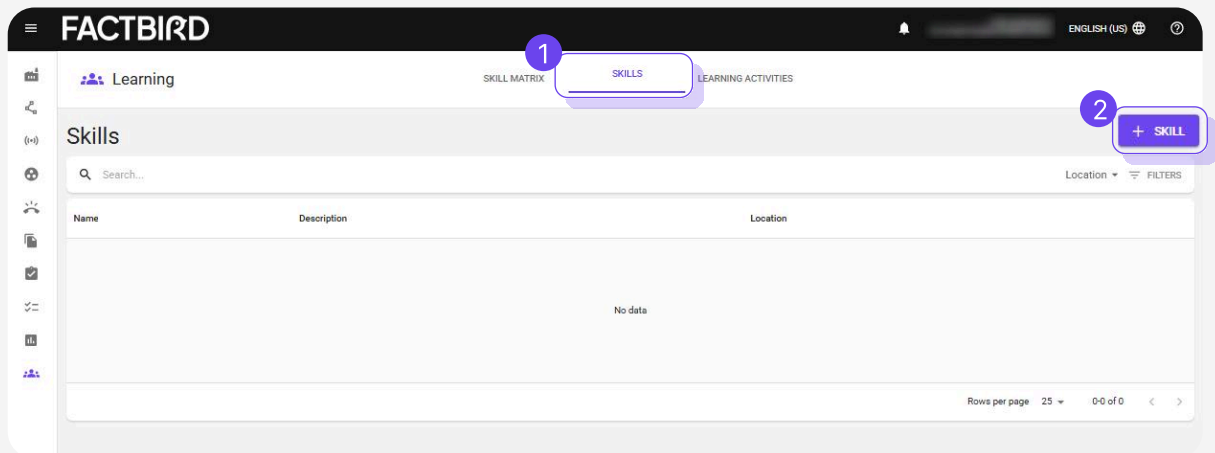
3. Fill out the **"General information"**:
   - Enter the "**Title**" and "**Description**".
   - Select the "**location**" where the skill will be applicable.
4. Click "**+ ADD LEARNING ACTIVITY**" to associate training content to the skill. Use "**Browse existing**" to select from existing content or "**+ Create new**" to create new training content.
5. Click "**SAVE**".
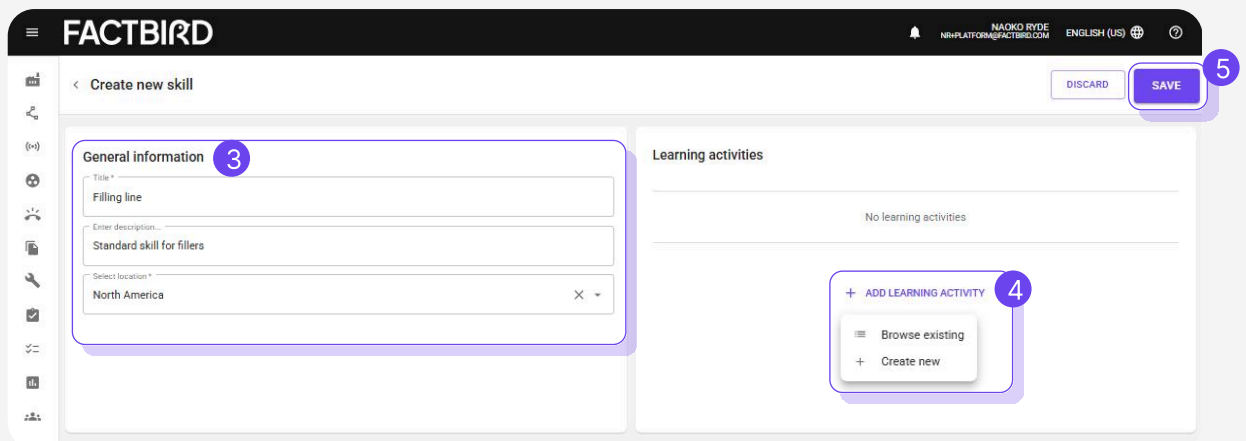
5 Associate skills and employee (users)

1. Click on the "**SKILL MATRIX**" tab.
2. The Skill matrix displays a chart of employees (users), their skills, and their skill status. What is displayed depends on the location, which can be selected from the "**Location**" menu. For example, if you choose "North America" from the "**Location**" menu, it will show the employees (users) and skills applicable to North America, including all assets and lines that belong to it.
3. To enroll a skill for an employee, drag the cursor to the skill and employee, then click "**+**".
4. Click "**ENROLL**". The circle will appear to indicate that the skill has been enrolled for the employee.

A checked circle indicates that the skill has been obtained, meaning the training for the skill has been completed by the employee.

A blank circle indicates that the training is enrolled for the employee, and the skill has not yet been obtained.

6 For an employee (user) to use Training

1. When an employee (user) logs in to Factbird, "**Notification**" icon will be displayed at the top right of the screen.
2. Clicking the notification icon opens "**Profile**" page of the user.
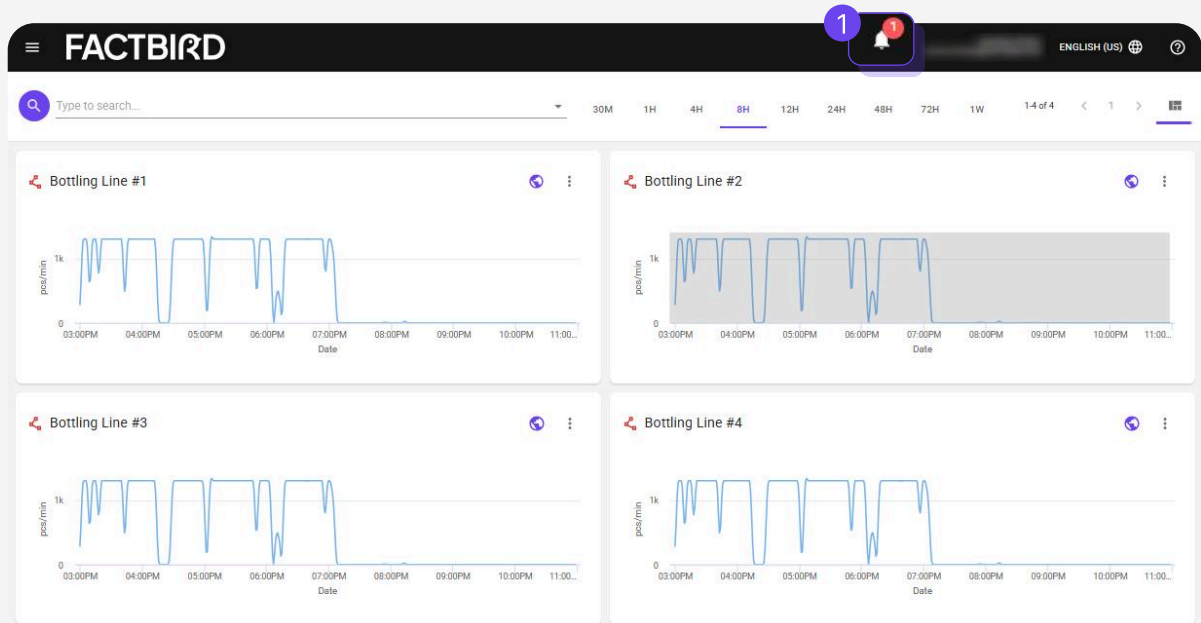
3. "**TASKS**" tab shows the training that needs to be completed by the user.
4. Click on the list and it opens the content.
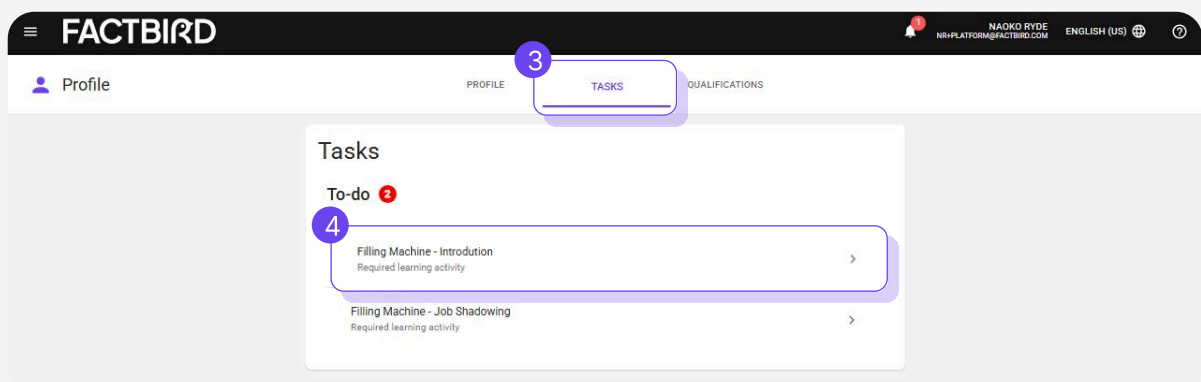
5. Click "**SUBMIT**" when the user completes the training. This will automatically update the skill status in the Skill Matrix.

6. "**QUALIFICATION**" tab displays a list of skills assigned to the user.
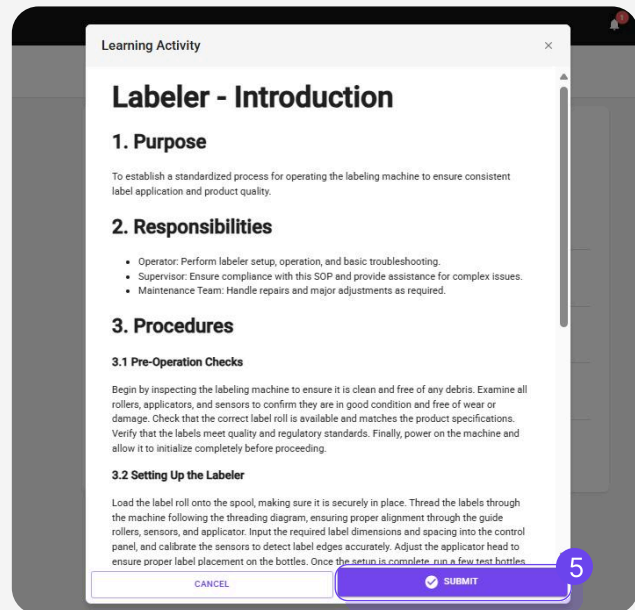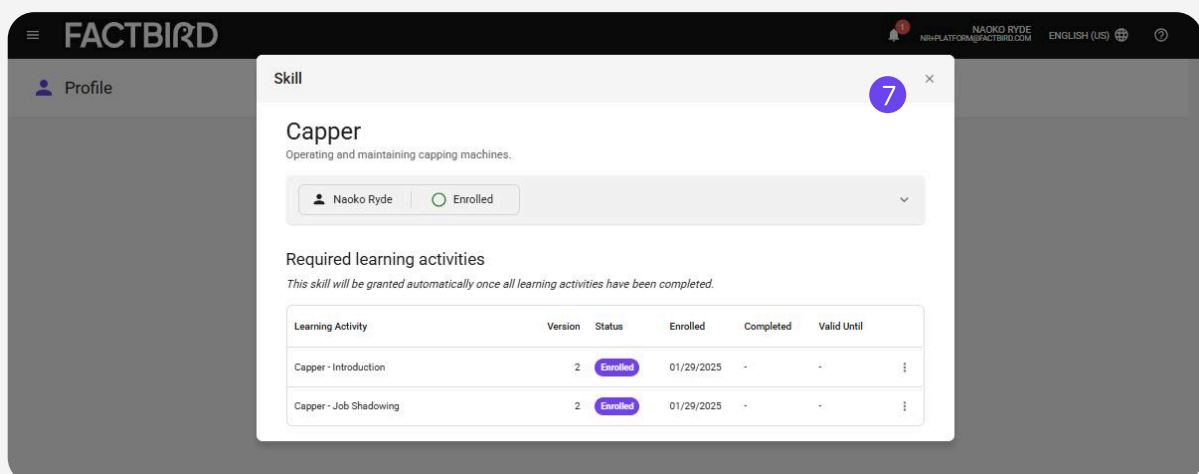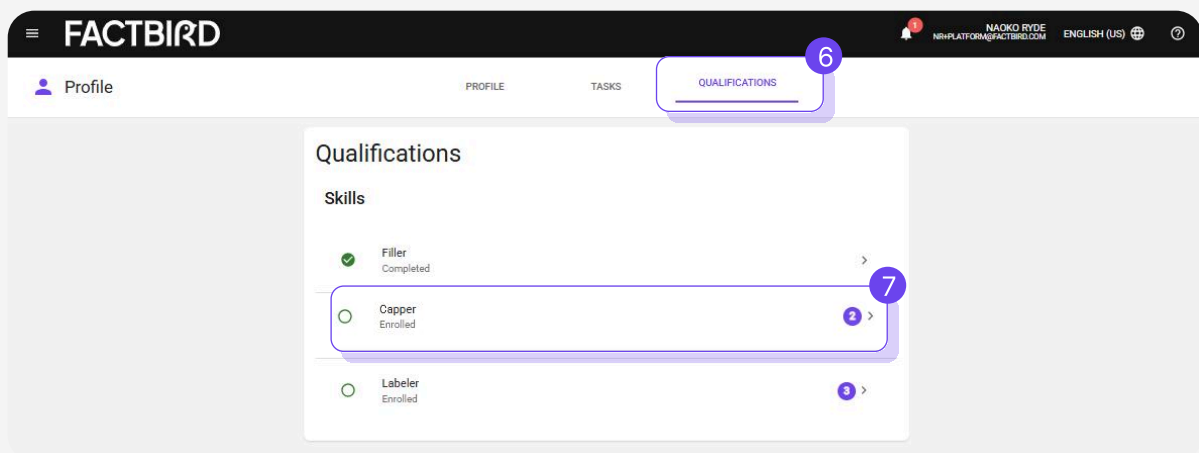7. Clicking on a skill opens its details.

> **What is Factbird Action Plans?**
>
> Action Plans in the Factbird Knowledge Excellence application is designed to drive improvements in factories using the PDCA method. It streamlines and digitizes workflows, automates notifications to prompt actions, and allows manufacturing companies to retain and utilize knowledge across the organization.

1a

Go to Action Plans and create an action plan

1. Click on **"Action Plans"** from the menu on the left side of the view
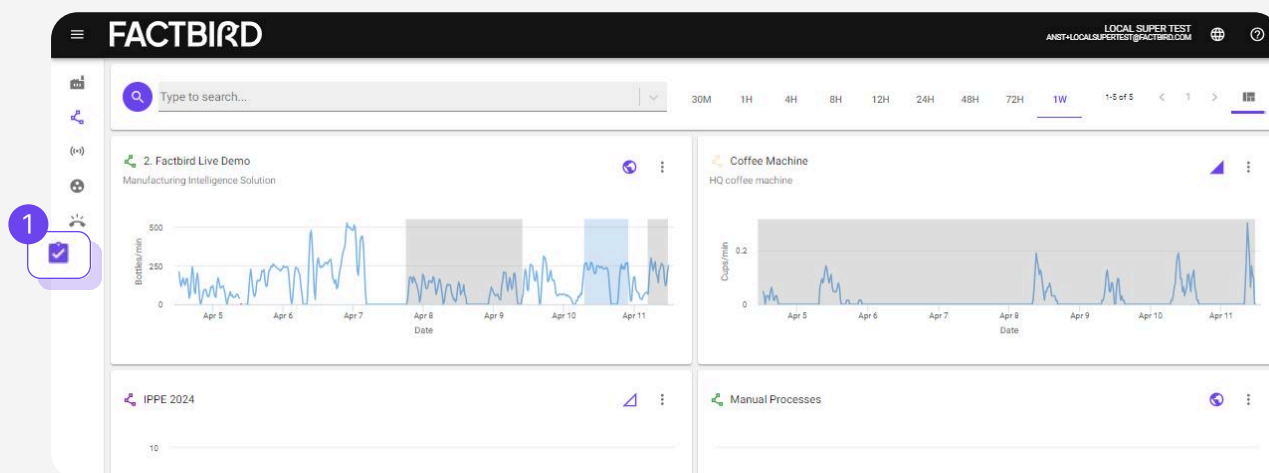

2. "**Action Plans**" page will be shown. Click "**+ACTION PLAN**" button to create an action plan.
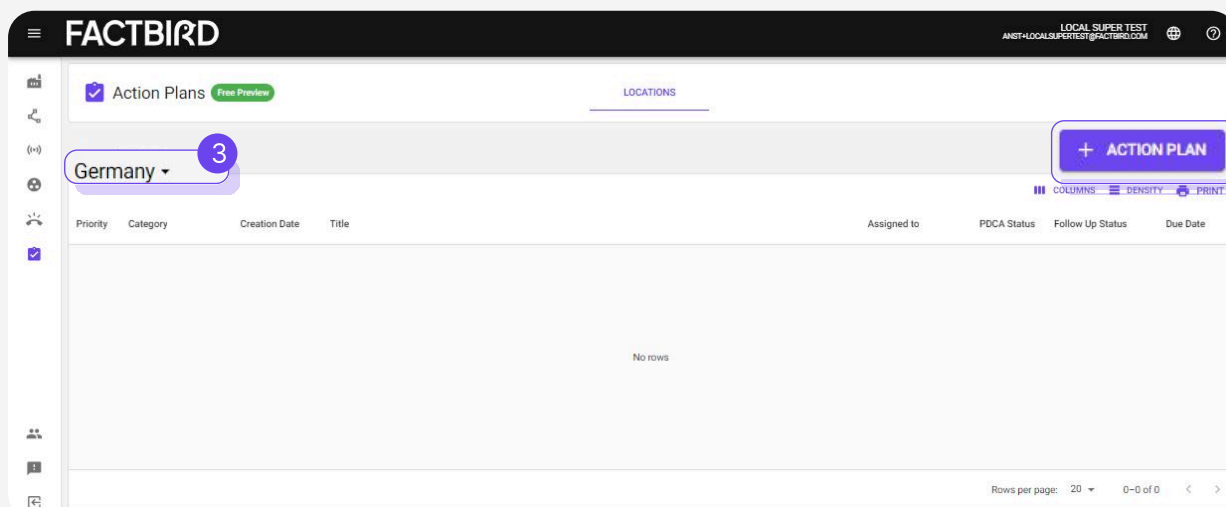
3. By selecting a location (e.g., line or company), you can create action plans for that location. New groupings of locations (e.g., departments, business units, sites) can be added and edited on the "**ORGANIZATION**" tab on the "**Administration**" page, if necessary. Contact your sales person for more information.

1b

Go to ANALYTICS and create action plan

1. Navigate to your desired line, then click the "**ANALYTICS**" tab.
2. Navigate to your desired analysis, e.g., "product jam" during April.
3. Click on "**ACTIONS**" and "**Create Action Plan**" to create an action plan for the analysis in 2, e.g., create an action plan for the "product jam".
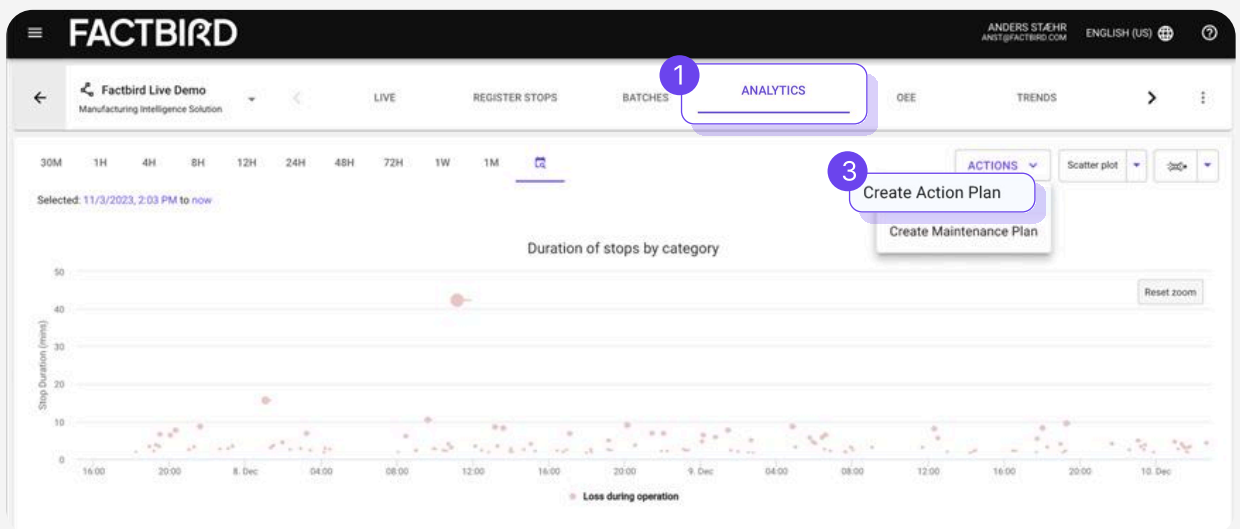
2 Fill out the form to create an action plan

On the "**Create action plan**" pop-up, fill out the information by following the instructions.

- **Title**: The name of the action plan
- **Category**: Choose from pre-set categories that cover typical categories for SQCDE (Safety, Quality, Cost, Delivery, Environment).

- **ATTACH PRODUCTION DATA**: The link to the relevant Factbird page (e.g., analytics of a stop cause "product jam" during April) can be added.
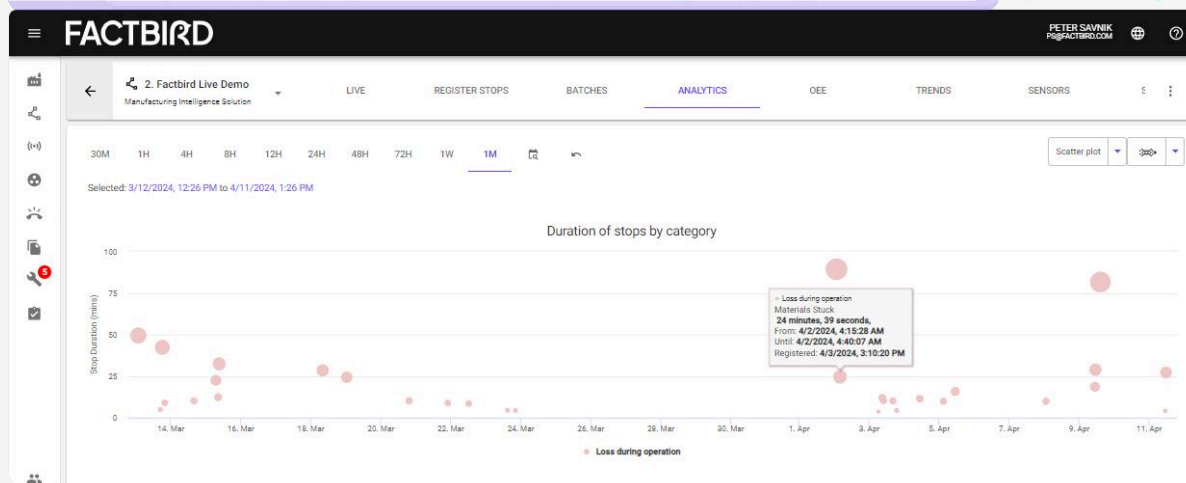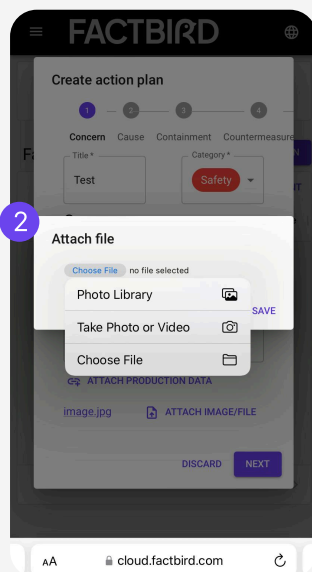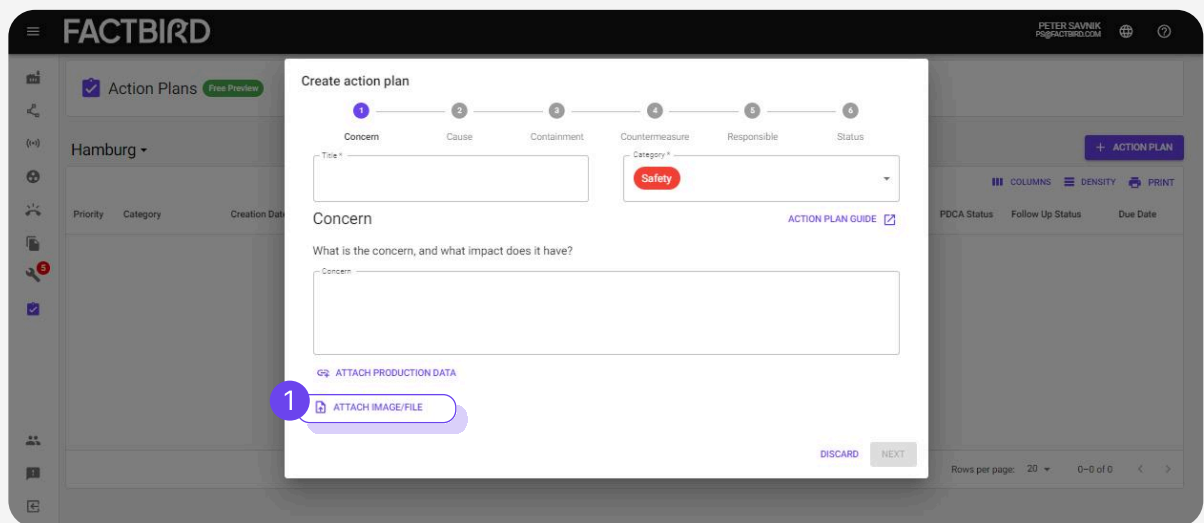

- **ATTACH IMAGE/FILE**: Relevant image/file (e.g., JPEG, PNG, PDF, any file format) can be uploaded. Multiple files and images can be uploaded by choosing a file and saving them one by one.

Attach images from your mobile device
1. Use your mobile device and click on "**ATTACH IMAGE/FILE**".
2. Click on "**Choose File**" and you can directly access your mobile device's camera to upload images.

- Fill out "**Cause**", "**Containment**", "**Countermeasure**".
- Clicking "**ACTION PLAN GUIDE**" shows the explanation of the PDCA cycle for your reference.

- On step "**Responsible**", choose the responsible person from the drop down menu. The person will receive a notification email from Factbird once the action plan is created.


- Set a due date and select the current status from the pie chart to visually indicate the status.
- Select a follow-up interval and click on the pie chart to visually indicate the status and click on "**SAVE**"

3

Manage action plans on Action Plans dashboard

1. Click on "**Action Plans**" from the menu on the left side.
2. Once action plans are created, they will be shown on the Action Plans dashboard.
3. **COLUMNS**: This allows you to customize the view by showing/hiding columns.
4. **DENSITY**: This allows you to adjust the view by narrowing/widening rows.
5. Clicking on a column title sorts the list.
6. Clicking on a star to turn it yellow visually highlights the action plan. Action plans with a star will be sorted higher by default.
7. You can select a location (e.g., departments, business units, sites) to show the action plans that belong to that location. The locations (e.g., departments, business units, sites) can be added and edited on "**ORGANIZATION**" tab on the "**Administration**" page.
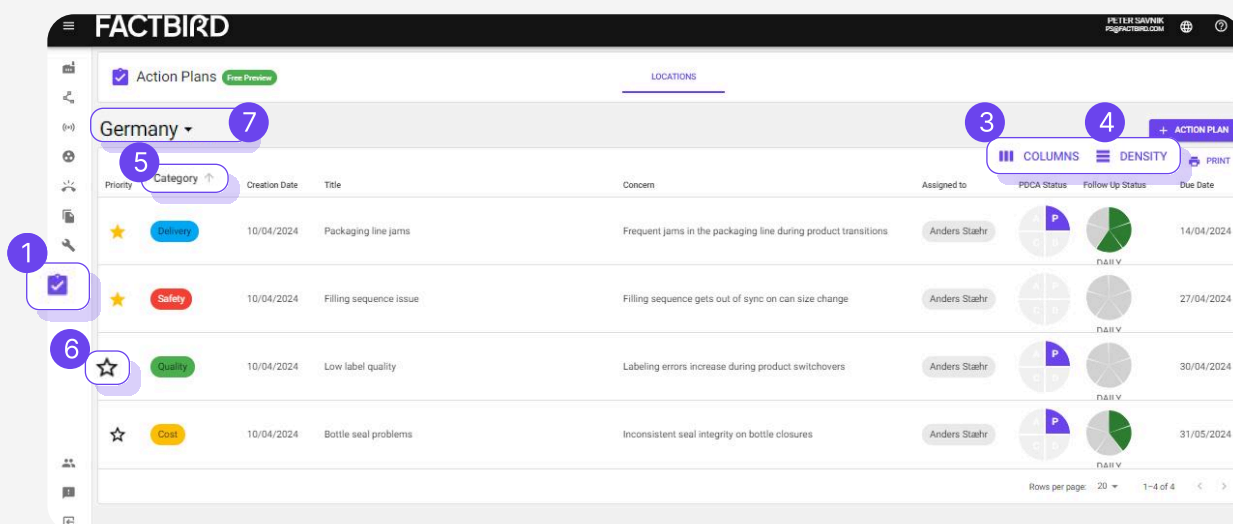
4

Add tasks to an action plan

1. Click on an action plan from the list to go to the "**Edit Action Plan**" page.
2. Click on "**Tasks**" to add tasks.
3. Check the checkboxes once the tasks are completed.

5

Send notifications to remind and escalate

1. Click on an action plan to see the full details or edit it.
2. Clicking mail icon sends an email notification to the responsible person.
3. If an action plan requires escalation to a higher level in the organization, use the "**ESCALATE**" button. Once escalated, the action plan also show up on the list of action plans for the level it has been escalated to. You can also assign a responsible at this new level who will get notified on email about their responsibility.