

# Workforce Management – Skills Matrix

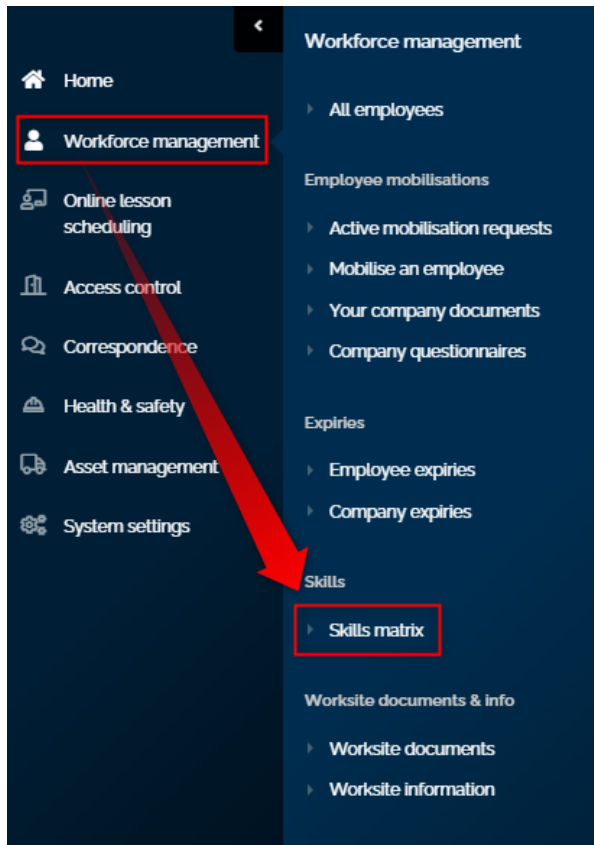
Manage your Company

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Product: EPP WFM

**Skills Matrix** is a valuable tool for assessing and tracking the skills and competencies of employees under your company. It helps in identifying skill gaps, planning training programs, and ensuring that the right people are assigned to the right tasks. This is a report to show employees with the specified skill with a status of valid, coming up for expiry or expired.

To access this feature, from the left side menu, click **Workforce management** → **Skills Matrix**.



## Creating New Skills Matrix

1. Click the **New skills matrix** button.
2. Select the **Worksite** you are creating the skill matrix for.

Worksite

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Create skills matrix for

Demo Site A

3. You can select the **Employees** you want to include in the report.

## Employees

Employees to include

All employees ▾

**Real time options**

All employees

Only those with a valid induction/registration

Employees currently on site

Employees that have logged in within the last ...

**Make your own list**

Individually select employees

You can select from the options categorized as **Real time options** and/or **Make your own list**.

*In this example, Make your own list → Individually select employees were selected.*

## Employees

Employees to include

Individually select employees ▾

Select employees

Inactive employees    Deactivated employees

<input checked="" type="checkbox"/>	Bond, Julie	Damstra ID: 616787
<input checked="" type="checkbox"/>	Horan, Nile B	Damstra ID: 656482
<input checked="" type="checkbox"/>	Read, Clarice (Curly)	Damstra ID: 655305
<input checked="" type="checkbox"/>	Stanton, Beth Ann (Beth)	Damstra ID: 618022

Currently selected:

- Stanton, Beth Ann (Beth)
- Read, Clarice (Curly)
- Horan, Nile B
- Bond, Julie

- After selecting the employees, you can now **select the skill** you want to include in the Skills Matrix report. Again, you can choose individually the skills by **making your own list** or select the skills by **Real time options** or copy **Your saved skill list**.

### Skill columns

Include

Select an option

Search

Your saved skill list

- Corina's cool list
- Corinas favourite skill list
- Corinas List
- Demo GST
- NHG NA
- Precast

*In this example, individually select skills were selected.*

Skill columns

Include

Individually select skills

Select skills

Filter by group Drivers Licence C

Select all visible  Only show skills with skill codes

Skills matching search/filters x Clear

- esq (Communication): Digital Drivers Licence C
- esq (Communication): Digital Drivers Licence C Learner
- esq (Communication): Digital Drivers Licence C P2
- esq (Communication): Drivers Licence C
- esq (Communication): Drivers Licence C Learner
- esq (Communication): Drivers Licence C P
- esq (Communication): Drivers Licence C P1
- esq (Communication): Drivers Licence C P2
- other skills (Competencies / Authorisations): Drivers Licence C Class Car
- other skills (Competencies / Authorisations): Drivers Licence CA Class Car

Currently selected: x Clear all

- esq (Communication): OHS Construction Induction - General Safety
- management (Competencies / Authorisations): Hazardous Chemical Officer Skill code: HCO23
- damstra learning (Competencies / Authorisations): Trainee Skill code: DMS249
- other skills (Competencies / Authorisations): Dragline Excavators - VoC Skill code: VOCDE
- damstra forms approver types (Competencies / Authorisations): HR Manager Skill code: DMS226
- esq (Communication): Drivers Licence C

- Click the **Next** button once satisfied and move you to the next page.
- You can **re-order** the skills according to your liking by **dragging the skill name**.

Order skills

⋮	OHS Construction Induction - General Safety
⋮	Hazardous Chemical Officer
⋮	Trainee
⋮	Dragline Excavators - VoC
⋮	Drivers Licence C
⋮	Drivers Licence C
⋮	HR Manager

- Select the additional **columns and skill information** you want to include in the report.

**Columns & skill information**

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Columns to include

- Crew name
- Department
- Latest medical test expiry
- Date of birth
- Last date the employee was on site
- Company
- Date employee started with their company
- Job titles

Skill display

- Icon, expiry date and skill level
- Icons only

Additional settings

- Include start date for all skills
- Only show expired skills & skills expiring in the next 90 days
- Abbreviate skill level
- Show time frame until expiry for skills expiring in the next 90 days

- Modify the **skill colours and preview** of the report according to your liking or select the default themes saved on the system under **Colour theme to use**.

**Skill colours & preview**

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Colour theme to use [Manage your themes](#)

Damstra classic

<p><b>Valid skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e8f5e9;"> <span style="color: green;">✔</span> 12 Sep 201930 Mar 2021 Level: Competent / Appointed         </div>	<p><b>Invalid skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #ffe0b2;"> <span style="color: red;">✘</span> 12 Sep 201930 Mar 2021 Level: Failed         </div>
<p><b>Skills expiring in 90 days</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e1bee7;"> <span style="color: blue;">i</span> 12 Sep 201930 Mar 2021 Level: Competent / Appointed         </div>	<p><b>Start date in future skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #ffe0b2;"> <span style="color: red;">📅</span> 12 Sep 201930 Mar 2021 Level: Competent / Appointed         </div>
<p><b>In progress skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e1bee7;"> <span style="color: blue;">⌚</span> Invalid date in progress         </div>	<p><b>Quarantined skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e1bee7;"> <span style="color: blue;">🔒</span> 12 Sep 201930 Mar 2021 Level: Competent / Appointed         </div>
<p><b>Not started skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e1bee7;"> <span style="color: red;">✘</span> 12 Sep 2019 Not started         </div>	<p><b>Archived skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #ffe0b2;"> <span style="color: orange;">📁</span> 12 Sep 201930 Mar 2021 Level: Competent / Appointed         </div>
<p><b>Expired skills</b></p> <p>Preview</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #ffe0b2;"> <span style="color: red;">✘</span> 12 Sep 201930 Mar 2021 Level: Competent / Appointed         </div>	

Saved themes (optional)

Create a new theme using the colours above

You can create a new theme using the same colours selected above by ticking the **Saved themes**.

- Click the View matrix button to preview the Skill Matrix you created.

**Demo Site A**  
Generated 3 Jun 2024 11:50 AM

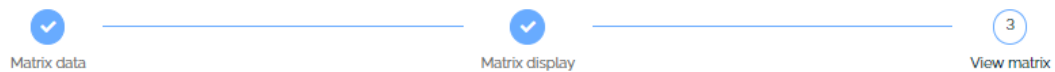
[Save matrix](#)

Valid	Expiring in 90 days	In progress	Not started	Expired	Invalid	Start date in future	Quarantined	Archived
7	0	0	0	0	0	0	0	0

4 employees, 4 skills	Department	Company start date	Job titles	Induction expiry date	Hazardous Chemical Officer (HCO203)	Trainee (DMS249)	Dragline Excavators - VOC (VOC203)	HR Manager (DMS226)	Total
Stanton, Beth Ann (Beth) Demo ID: 685332	Risk Management coordinator	27 Sep 2023	<ul style="list-style-type: none"> <li>Damelta Training</li> <li>Emergency Response</li> <li>First Aid Officer</li> </ul>	No expiry	6 Nov 2023 - No expiry Level undefined	5 Oct 2023 - No expiry Level Competent	28 Mar 2024 - 28 Mar 2025 Level Competent		
Reed, Clance (Clary) Demo ID: 665335	-	25 Mar 2024	<ul style="list-style-type: none"> <li>Engineer</li> </ul>	No expiry		19 Apr 2024 - No expiry Level Competent		19 Apr 2024 - No expiry Level Competent	
Horan, Nile B Demo ID: 664462	-	10 Apr 2024	<ul style="list-style-type: none"> <li>Contractor</li> </ul>	11 Apr 2025 1 year induction			22 Apr 2024 - 22 Apr 2025 Level Competent		
Bond, Julie Demo ID: 685787	-	19 Sep 2023	<ul style="list-style-type: none"> <li>Damelta Staff</li> </ul>	No expiry		25 Oct 2023 - No expiry Level Competent			
Level: Competent					0	3	2	1	6
Level: undefined					1	0	0	0	1
Total valid					1	3	2	1	7
Total expiring in 90 days					0	0	0	0	0
Total in progress					0	0	0	0	0
Total not started					0	0	0	0	0
Total expired					0	0	0	0	0
Total invalid					0	0	0	0	0
Total start date in future					0	0	0	0	0
Total quarantined					0	0	0	0	0
Total unassigned					0	0	0	0	0

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10. Click the **Matrix data** or **Matrix display** from above if the preview matrix needs some revision.



11. If satisfied with all the data collected for the Skills matrix report, you can save the matrix by clicking the [Save matrix](#) button. Then, provide a **Matrix name** for this Saved Matrix. Visibility can be modified if you want this matrix to be visible to **Only you** or to the **Public**. Click the [Save matrix](#) button once done.

**Save matrix** ✕

Matrix name

Visibility

Only you

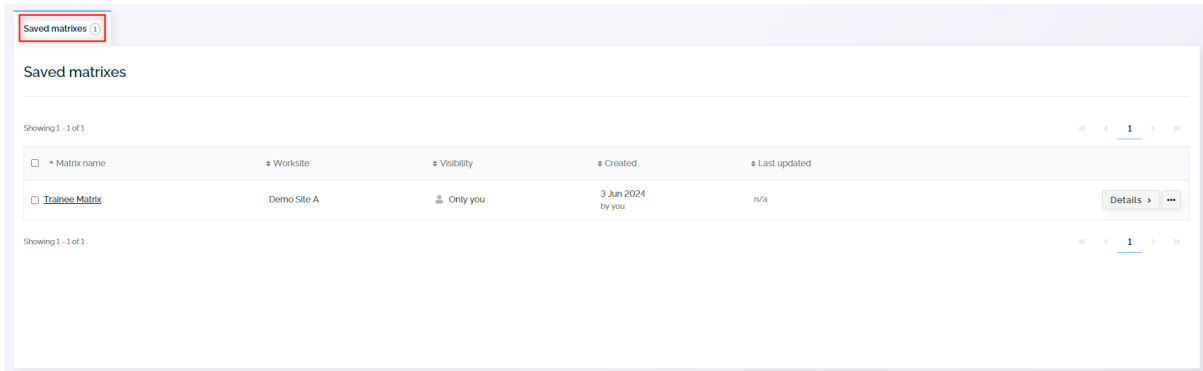
Public

[Back](#)
[Save matrix](#)

## Saved Matrixes

The saved matrix will be automatically seated under Saved Matrixes. This tile will display the following information:

- ▶ Matrix Name
- ▶ Worksite
- ▶ Visibility
- ▶ Created
- ▶ Last Updated



## Copy a saved Matrix

The Copy Matrix is an additional feature under Skills Matrix wherein you can copy or duplicate the saved matrixes in your company portal. To access this feature, go to

**Skills matrix** tab under Workforce management in your left-side menu. The page will display your saved matrixes, look for the skill matrix you want to copy/duplicate then click the



Click the **Copy matrix** to duplicate the matrix you selected. An indication will appear on the upper right side of the screen that the selected matrix was successfully copied. The Matrix name will have a **(copy)** word next to it.



## Editing a saved Skill Matrix

Editing a saved skills matrix involves updating the existing data to reflect changes in employee skills, roles, or proficiency levels. This process ensures the matrix remains accurate and useful for decision making.

**You have the option to edit the following:**

1. **Details** – edit the matrix name and the visibility of the skills matrix from only you to public or vice versa.

The screenshot shows the 'Trainee Matrix (copy)(14)' interface. At the top, there is a header with 'Demo Site A' and an 'Actions' button. Below the header, there are three columns of metadata: 'Visibility' (Only you), 'Created' (24 Jun 2024 by you), and 'Last updated' (24 Jun 2024 by you). A navigation bar contains five tabs: 'View', 'Details' (highlighted with a red box), 'Data', 'Display', and 'Change history'. Below the navigation bar, the 'Matrix details' section is visible. It contains a 'Matrix name' field with the value 'Trainee Matrix (copy)(14)' and a 'Visibility' section with two radio buttons: 'Only you' and 'Public' (selected). At the bottom right of the details section, there is a green 'Update' button highlighted with a red box.

Click the **Update** button to save the changes made.

2. **Data** – edit the employees and skills selected by adding or removing them from the matrix.

The screenshot displays the 'Matrix data' configuration interface. At the top, a navigation bar contains 'View', 'Details', 'Data' (highlighted with a red box), 'Display', and 'Change history'. The main content area is divided into two sections: 'Employees' and 'Skill columns', both highlighted with red boxes.

**Employees section:** Includes a dropdown for 'Employees to include' (set to 'Individually select employees'), a search bar for 'Select employees', and checkboxes for 'Inactive employees' and 'Deactivated employees'. A list of employees is shown with checkboxes and 'Damstra ID' values. A 'Currently selected' list on the right shows three employees: Bond, Julie; Horan, Nilo B; and Stanton, Beth Ann (Beth).

**Skill columns section:** Includes a dropdown for 'Include' (set to 'Individually select skills'), a search bar for 'Select skills', and a 'Filter by group' dropdown. A list of skills is shown with checkboxes and descriptions. A 'Currently selected' list on the right shows several skills including 'management (Competencies / Authorisations) Hazardous Chemical Officer' and 'damstra learning (Competencies / Authorisations) Crane'.

Additional settings are present below both sections, such as 'Don't show an employee in the matrix if they have none of the skills selected below' and 'Hide skill column if none of the selected employees have that skill'. An 'Update' button is located at the bottom right.

Click the **Update** button to save the changes made.

3. **Display** – edit the display by re-ordering the skills, column and skill information and the colour palate.

Click the **Update** button to save the changes made.

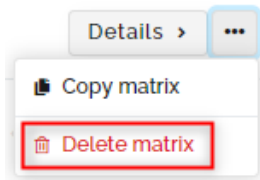
## Downloading Skills Matrix

To download the Saved Skills Matrix, click on the **Details >** button. Then click the **Download** button. The downloaded file will be saved as an Excel file.

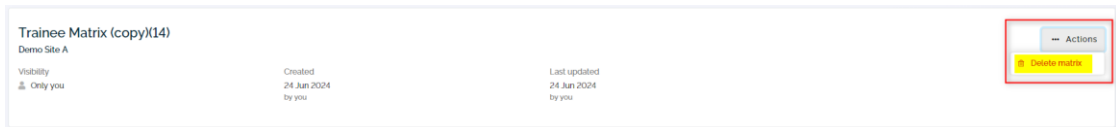
## Deleting a Skill Matrix

There are three ways to delete a saved skill matrix.

1. From the saved skill matrix page, click the **⋮** and select the delete matrix button.



- Another way to delete a matrix is by clicking the **Details >**, then the **Actions** button.



- The last option is deleting matrixes in bulk by ticking the box next to the skill name, a pop-up box will appear at the bottom of the page. Select the Delete button to delete the selected matrixes.

