

# Skill Authors Guide

## *Pract.us Basics for Skill Authors*



**This guide helps Skill Authors get the most from the Pract.us app. For more detailed help with other Pract.us roles, see these additional guides:**

Getting Started

Managers Guide

Mentors Guide

Learners Guide

Card Authors Guide

Team Admins Guide

### Topics in this Guide

- [Before you begin](#)
- [Creating new skills](#)
- [Editing skills & version](#)
- [Creating new references](#)
- [Getting help](#)

### Skill Authoring - Before You Begin...

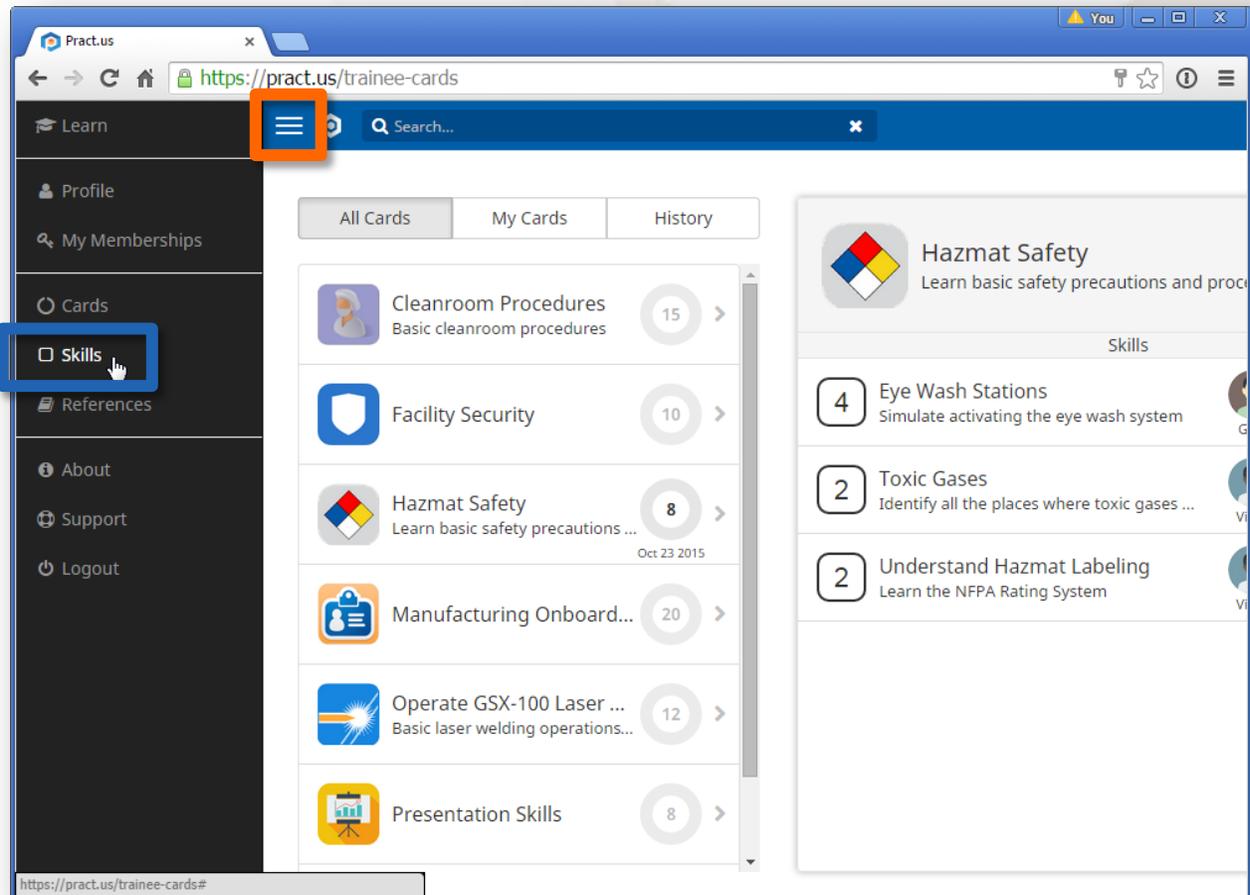
What makes a good skill? We learn best in bite-sized chunks, so skills should cover activities that take about 15 minutes to 2 hours to master. Tasks or capabilities that take longer to complete or develop can be broken into smaller chunks. For example, if you're learning how to drive a car, you might first observe someone driving, then explain the process to a Mentor, then get behind the wheel yourself. A skill should also be something a Mentor can observe and judge.

What makes a bad skill? Undefined or open-ended tasks don't have a clear endpoint, so it's hard to know when they are complete. Skills need definite beginning and ending points. Unobservable or unmeasurable tasks also make bad skills: If Mentors can't observe the skill, they can't know if you've learned it or not.

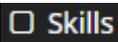
## Creating New Skills

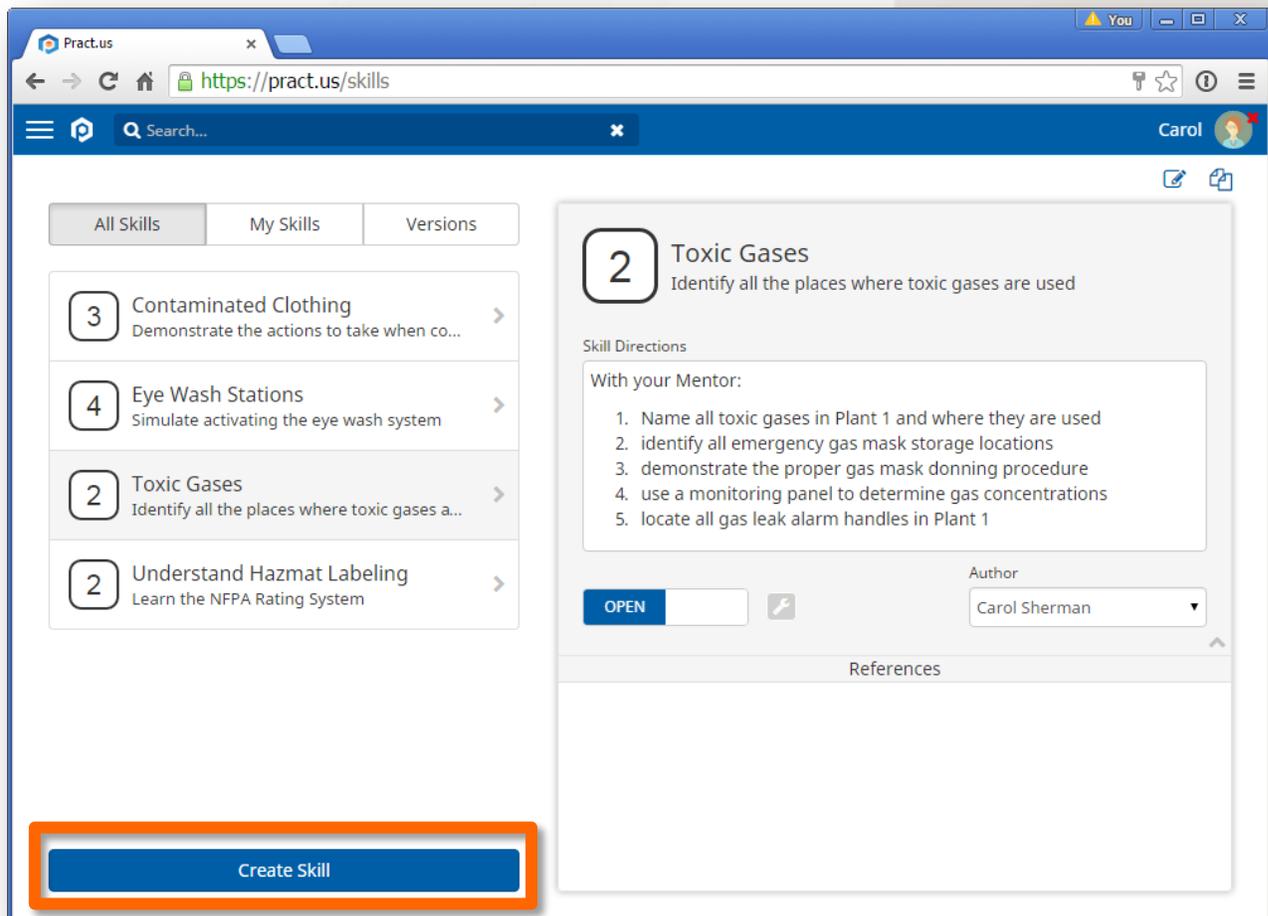
You need to be an Author (have Author role) before creating a new skill. Your Pract.us team Admin can give you the Author role if you don't already have it.

1. From any view, show the slide-out menu by selecting the  button as shown in the **orange** rectangle below.



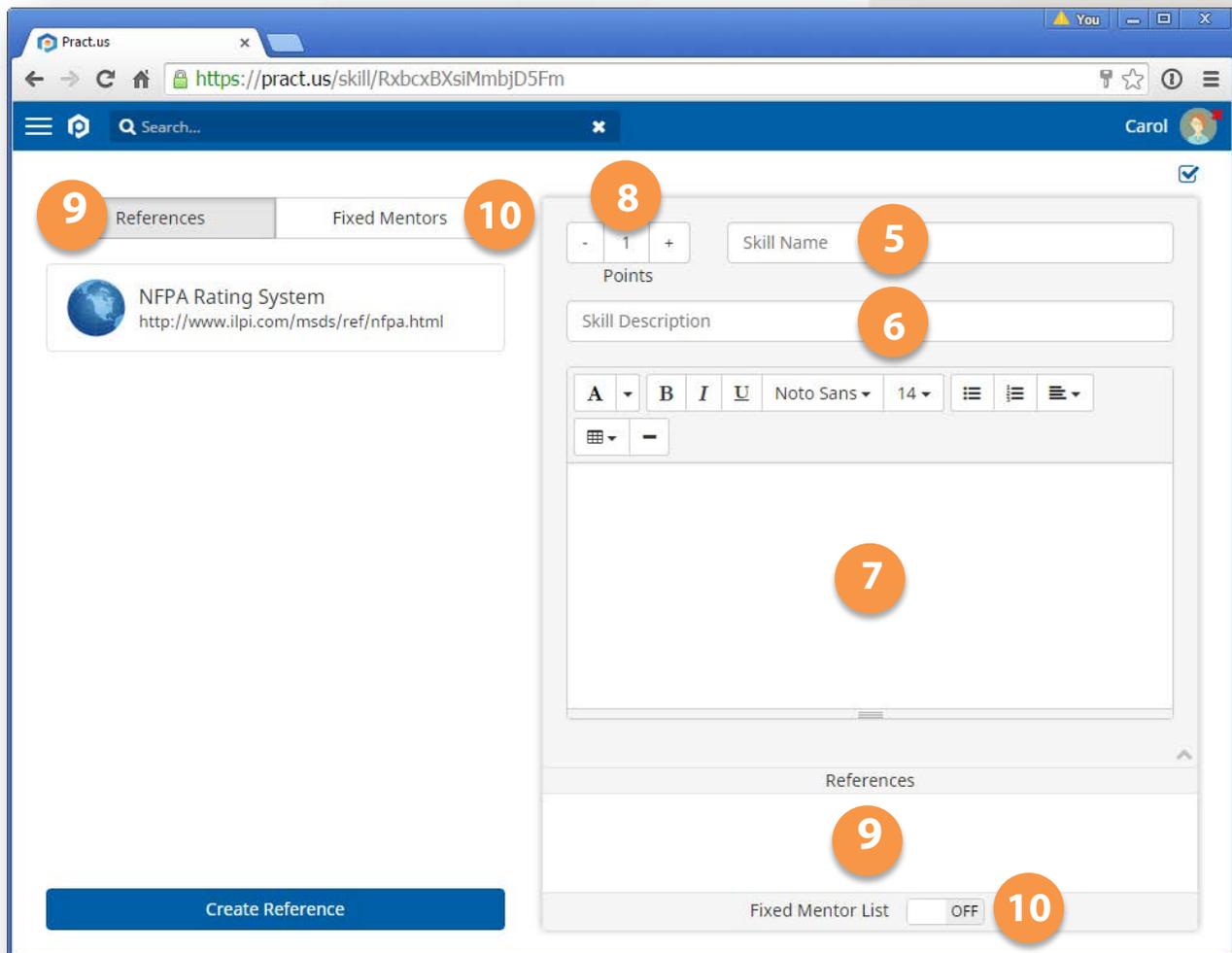
*The Card Catalog (Learn view) with slide-out menu visible on the left side*

2. Select  in the **blue** rectangle above. If you don't have the Author role, you won't see this menu option. You should see a view like the following:



*The Skills view*

3. Select **Create Skill** as shown in the **orange** rectangle above.
4. You should see the New Skill view below (the numbered orange circles are used for reference here - they aren't part of the view):



*The New Skill view*

5. Enter a **Skill Name**. Remember that the skill name is the “title” of the skill and will be shown in larger letters in all lists. So try to keep your skill names as concise as possible.
6. Enter a **Skill Description**. This is usually just a short elaboration on the skill name. The skill description will be shown in smaller letters underneath the skill name in all lists.
7. Enter **Skill Instructions**. The instructions define and describe the requirements for completing the skill, e.g. explaining a concept to a Mentor, performing the skill for a Mentor or answering Mentor questions about the topic. The instructions should be clear and precise. There are a number of text editing tools available in the window palette to help you organize and lay out your instructions.
8. Assign a **Point** value using the + and - buttons to increase or decrease the point value in 1-point increments. Each Pract.us Team uses a common, consistent point system for all skills in all Fields. Points usually represent some amount of time. If you believe that a Learner should be able to

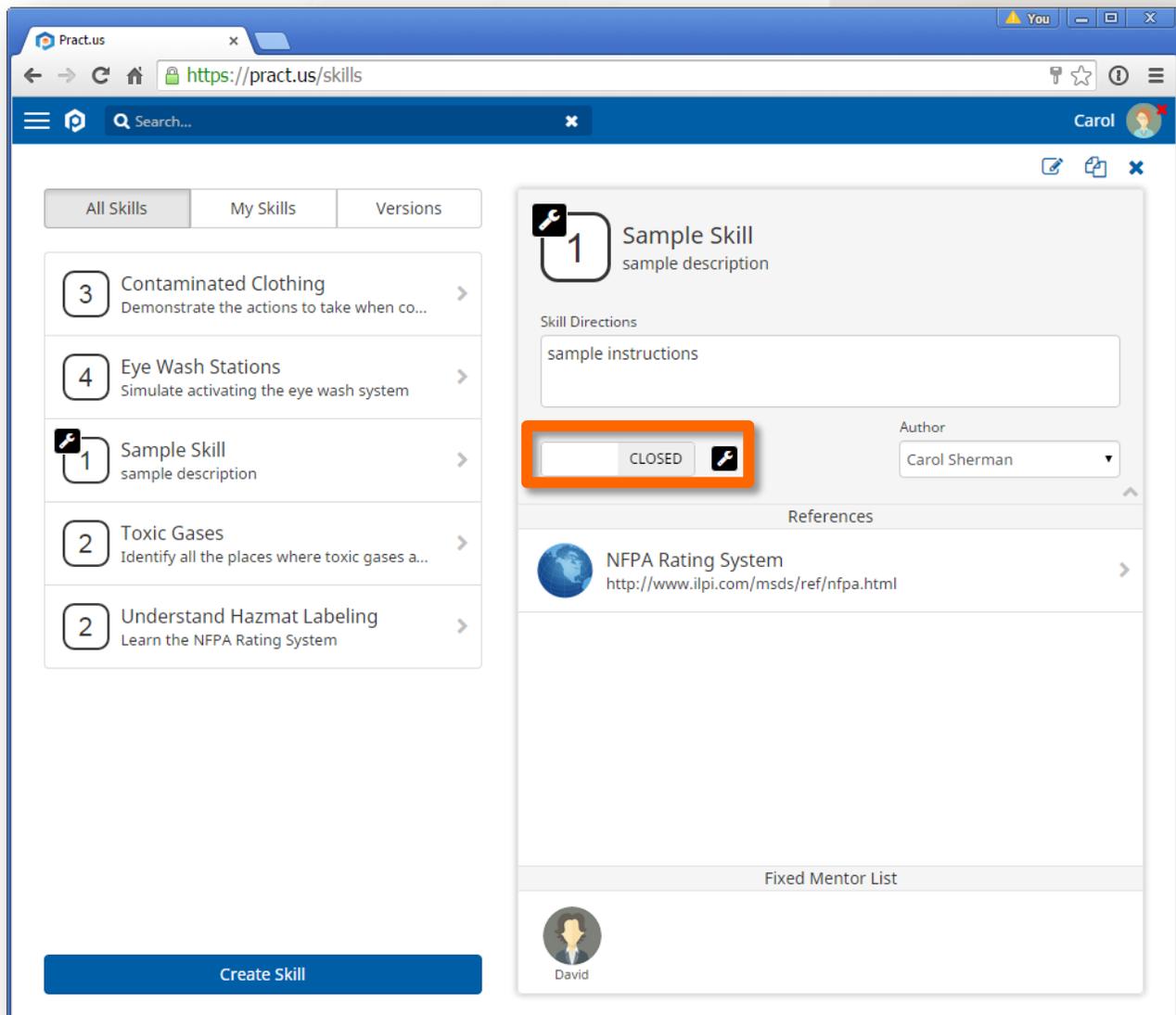
prepare for and perform a skill in about an hour, then assign the equivalent point value. If you're not sure of the point ratio or system your team uses, then ask your Team Admin.

- a. Example 1: if your team uses the ratio of 15 minutes per point, then a skill that you expect to take the average Learner about an hour to prepare for and complete should be "worth" 4 points. Clicking the + button four times will set the Points to **4**.
  - b. Example 2: if your team uses the ratio of one hour per point, then a skill that you expect to take the average Learner about an hour to prepare for and complete should be "worth" 1 point.
9. Assign **References** to the skill by dragging references from the left-hand list to the References pane of the skill. These are resources you're suggesting Learners should use in their preparation. References are optional - you don't need to use them if they don't apply to your skill.
- a. If you want to create a new reference, see [Creating New References](#).
10. The **Fixed Mentor List** enables you, the skill Author, to assign specific Mentors to the skill. In most cases, you'll leave this list empty and allow the card Authors who use your skill to make their own Mentor assignments in the card (see Card Authors Guide for full details). This gives other Authors in your Field maximum flexibility to use your skill on different cards. If you add Mentors to a skill's Fixed Mentor List, then no other Authors can remove them or add other Mentors to the skill when it's used in a card. The Mentor List for that skill is fixed, or locked.
- a. Example 1: You are building skills for use in a large company with many offices. Your skills will be used by other Authors to make cards. One card Author in Boston wants to assign local Mentors from the Boston office, while another card Author in New York wants to assign Mentors from the New York office. Leaving the Fixed Mentor section empty will permit these two card Authors to assign different Mentors to your skill when they build their cards.
  - b. Example 2: You are building a skill for use in a large company with many offices, but it's important to *control* the list of Mentors who can sign off the skill. Perhaps the Regional VP must sign off this skill for all northeastern offices. In this case, you'll want to add the Regional VP to the Fixed Mentors List.
11. To add Mentors to the Fixed Mentor List,
12. flip the switch to **on** *the switch >* 
13. select **Fixed Mentors** in the left side list's header
14. drag Mentors from the left side and drop them in the Fixed Mentor List. Only members of the team who have the Mentor role will be available in this list.
15. The order of Mentors in the Fixed Mentor List doesn't matter.
16. If you add any Mentors to the Fixed Mentor List, then other Authors can't add any new Mentors to that skill in their cards, or remove any Mentors from your Fixed Mentor List. Your Fixed Mentors are the only Mentors that can sign off this skill, wherever the skill is used.

17. To remove a Mentor from the Fixed Mentor List, hover near the Mentor's avatar until a small **gray x** icon appears in the upper-right. Select **x** to remove the Mentor from the List, as shown below:



18. If you flip the switch to **off**, any Mentors inside will remain there *but they won't be used as Fixed Mentors*.
19. As long as the switch remains on, the Fixed Mentor List must contain at least one Mentor.
20. To save your new skill, select **Save**  in the upper right corner of the app window. Your skill view re-appears:



*A new Skill as it appears right after saving*

21. All newly created skills are initially **Closed**. You, as the skill's Author, must manually **Open** a skill to make it available for card enrollments. But you can keep it closed for as long as you want, opening it only when you're ready.
22. Open and closed status is indicated by the position of the open/closed switch and the **black** wrench icon, shown above in the **orange** rectangle. Only Authors will see this switch and only for *their* skills.

*this skill is open >*



*this skill is closed >*



23. To flip the switch, either touch or click it. You should see the switch change to the other position.

24. While closed, the  icon is also attached to the skill header and the list of skills on the left.
25. While your skill is closed, any Author in the Field can add the skill to a card. But the card itself can't be opened until all the skills on the card are also open, including yours.
26. If you close a skill to edit it and it's already included on open cards, then the skill in the card remains unchanged until the card is closed. When a card is closed, all its skills update or "upgrade" to their latest versions, and it can't be reopened until all its skills are open too.

### Editing Skills & Skill Versions

Pract.us keeps track of changes you make to your skills and automatically assigns version numbers to them. This is handled "behind the scenes" so you won't need to worry about the complexities of version numbers. But because versions are tracked, your Team will always be able to determine which Learners completed which versions of skills. This ensures long-term integrity and accountability in the system.

There is a special type of skill change that does not trigger a new version - changing Mentors in the Fixed Mentor List. Because the members of a Pract.us Field and Team may change frequently, both their names and their roles, it may also be necessary to update the Mentor assignments in a card frequently. To make Mentor changes as easy and low-impact as possible, we don't require you to close a skill first before changing, adding, or removing Mentors in its Fixed Mentor List.

When it comes to Mentors, what *really* matters for purposes of record-keeping is which Mentor actually signed off a Learner's skill. Pract.us keeps permanent records of all sign-offs, including which Mentor did the signing off. And the record of an existing sign-off will never change, even if an Author replaces the Mentor later on for new enrollments. It's less important which Mentors *could have* signed off a skill, so that information isn't tracked in card versions.

For all other types of skill changes, such as name, description, directions or point value, follow these steps:

1. To edit an existing skill, you must first close it. Closing a skill takes it "offline" for maintenance. Only the skill's Author can close the skill.
  - a. While a skill is closed, you can edit, clone or retire it.
  - b. While a skill is closed, card Authors can still add it to a card. But the card can't be opened until all skills on the card are also open.
  - c. While a skill is either open or closed, any Author may clone it to create a starting point for their own work.
  - d. Editing Mentors in the Fixed Mentor List (if used) does not require closing the skill first. Just select the **Edit** button  and make any Mentor changes needed, then **Save**  You don't need to close the skill because changes to the Fixed Mentor List (or any Mentor list for that matter) are not tracked the way other skill changes are for versioning purposes.

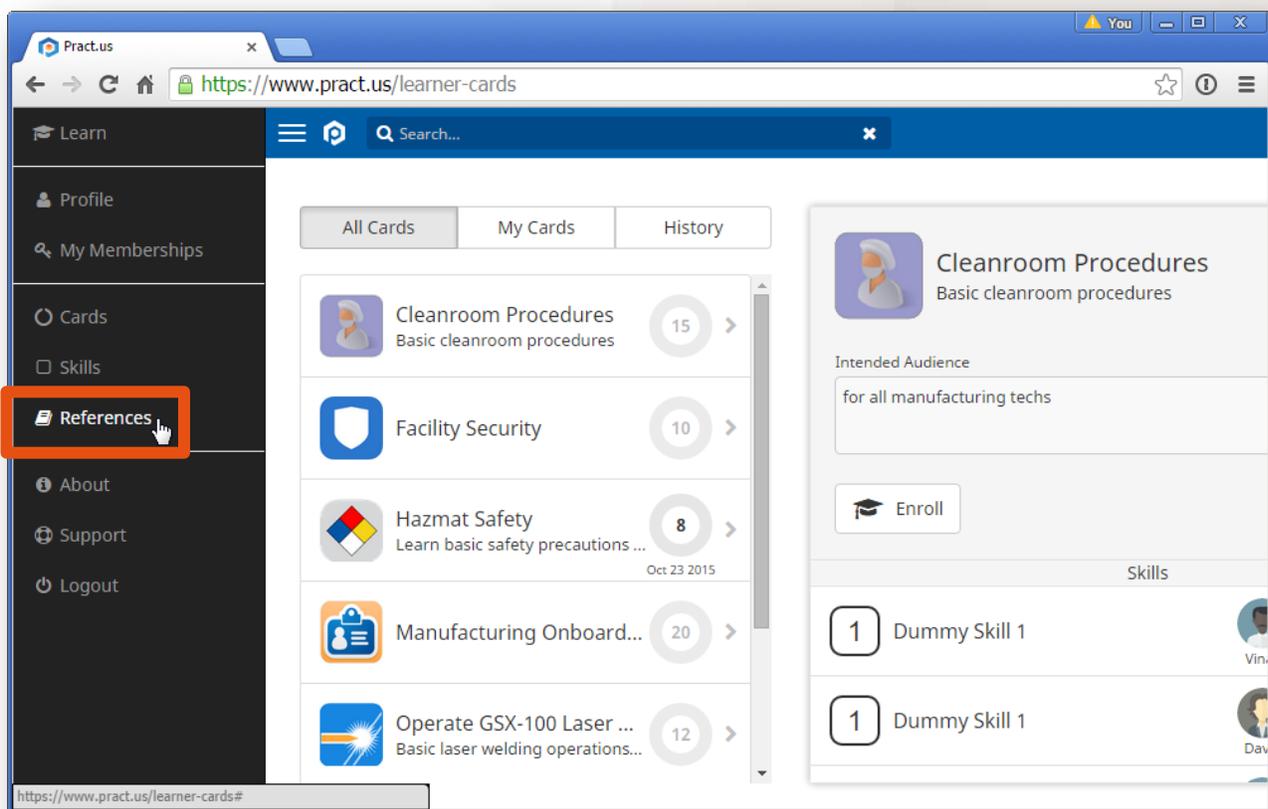
- e. The moment a skill is closed, a new version is created if and only if any enrollment has ever occurred for a card that uses the skill's current version. This includes active, cancelled, or completed enrollments. This ensures that Pract.us keeps track of all card and skill changes between enrollments. But if there *haven't been any* enrollments since the last change, then Pract.us will not create a new version. A new version, if created, becomes effective as soon as the skill is re-opened.
- example 1: An open skill is currently at version 2. One Learner is currently enrolled in a card that uses this version. Now, the skill's Author closes the skill in order to edit it. Because one enrollment in version 2 already exists, Pract.us immediately bumps the skill version to 3 as soon as the Author closes it.
  - example 2: An open skill is currently at version 2. Some Learners have completed cards that used this version, but none are active. Now, the skill's Author closes the skill in order to edit it. Because at least one enrollment using version 2 has occurred, even though none are still active, Pract.us immediately bumps the skill version to 3 as soon as the Author closes it.
  - example 3: An open skill is at version 2 but no Learners have ever enrolled in the card that uses this version - no active, cancelled, or completed enrollments. Now, the skill's Author closes it in order to edit it. Because there were no enrollments in version 2, Pract.us does not bump the skill version when closed. When the Author finishes editing and re-opens the skill, it remains at version 2.
  - example 4: An open skill is currently at version 2. Some Learners are currently enrolled in cards that use this skill version. Now, the skill's Author edits the skill in order to add a Mentor to the Fixed Mentor List. Because this is a Mentor change, it's not necessary to close the skill. As soon as the Author saves the Mentor change, all Learners with active cards immediately see the new Mentor in their cards. No new skill version is created.
2. Open and closed status is indicated by the position of the open/closed switch and the **black** wrench 
  3. Once the skill is closed, select the **Edit** button  in the upper right corner.
  4. Make your changes to the skill. You can change anything about the skill, including Instructions, References and Points. As mention in 1(d) above, you don't need to close a skill in order to edit Mentors. And if you don't close the skill, then the *only* changes you can make are to the Fixed Mentor List.
  5. Once all changes have been made, select the **Save** button  in the upper right corner.
  6. You can leave the skill closed for as long as you like. This can be useful when making changes over a period of time. But keep in mind that all skills on a card must be open before the card itself can be open. So don't leave your skills closed longer than necessary.
  7. Once your changes are complete, open the skill. This makes your skill available for use in enrolled cards again.

## Creating New References

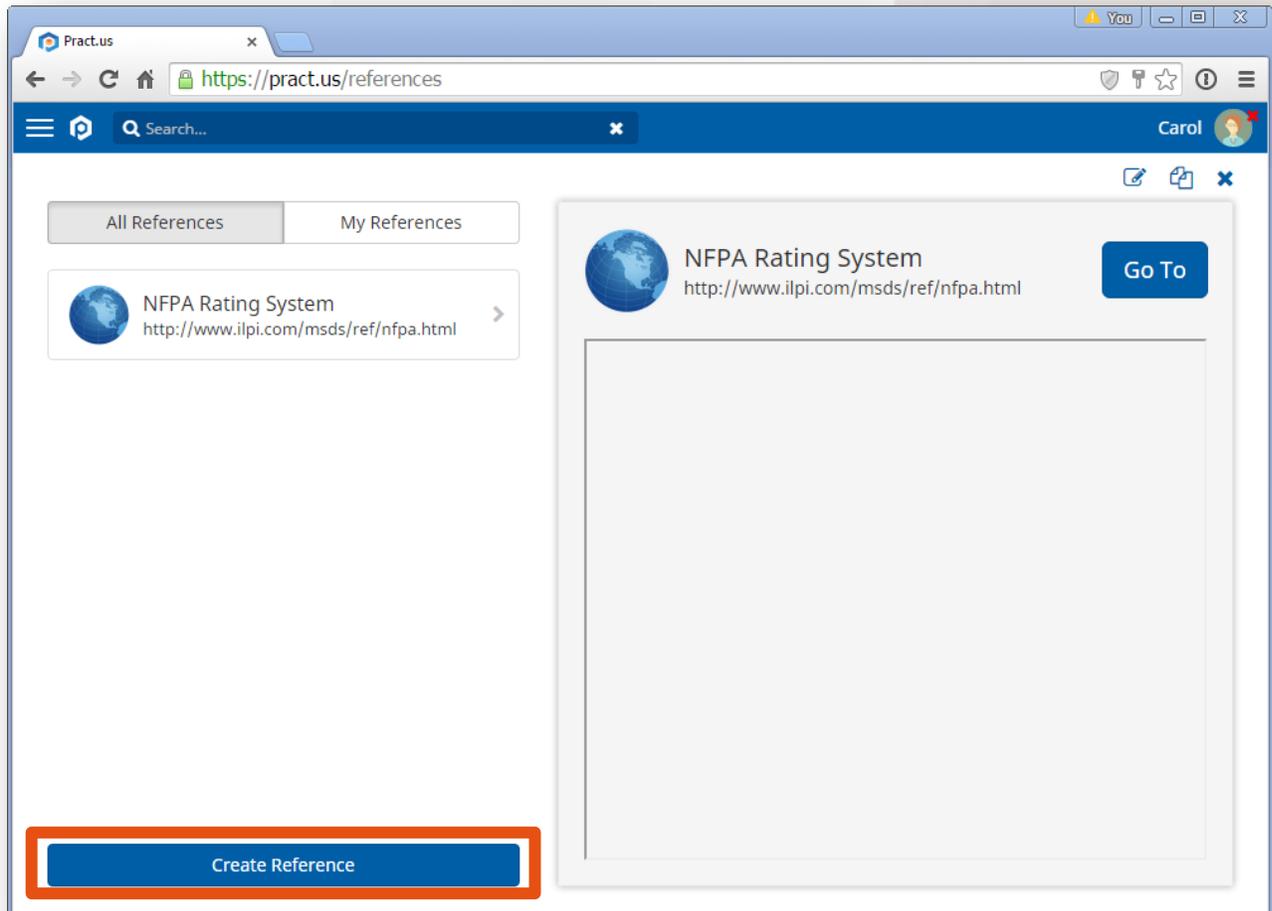
You need to be an Author (have Author role) before creating a new reference. Your Pract.us team Admin can give you the Author role.

References can be any resource you feel is helpful to use in preparation for a skill. References may be electronic, paper, or even human! If you already use a Learning Management System or a document repository (such as Microsoft SharePoint), then you can use Pract.us references to “point” to these resources. Reference materials are not actually uploaded into Pract.us - they are “pointed” to by the references created here and added to skills.

1. From any view, go to the slide-out menu and select **References** as shown in the **orange** rectangle below. If you don't have the Author role, you won't see this menu option.

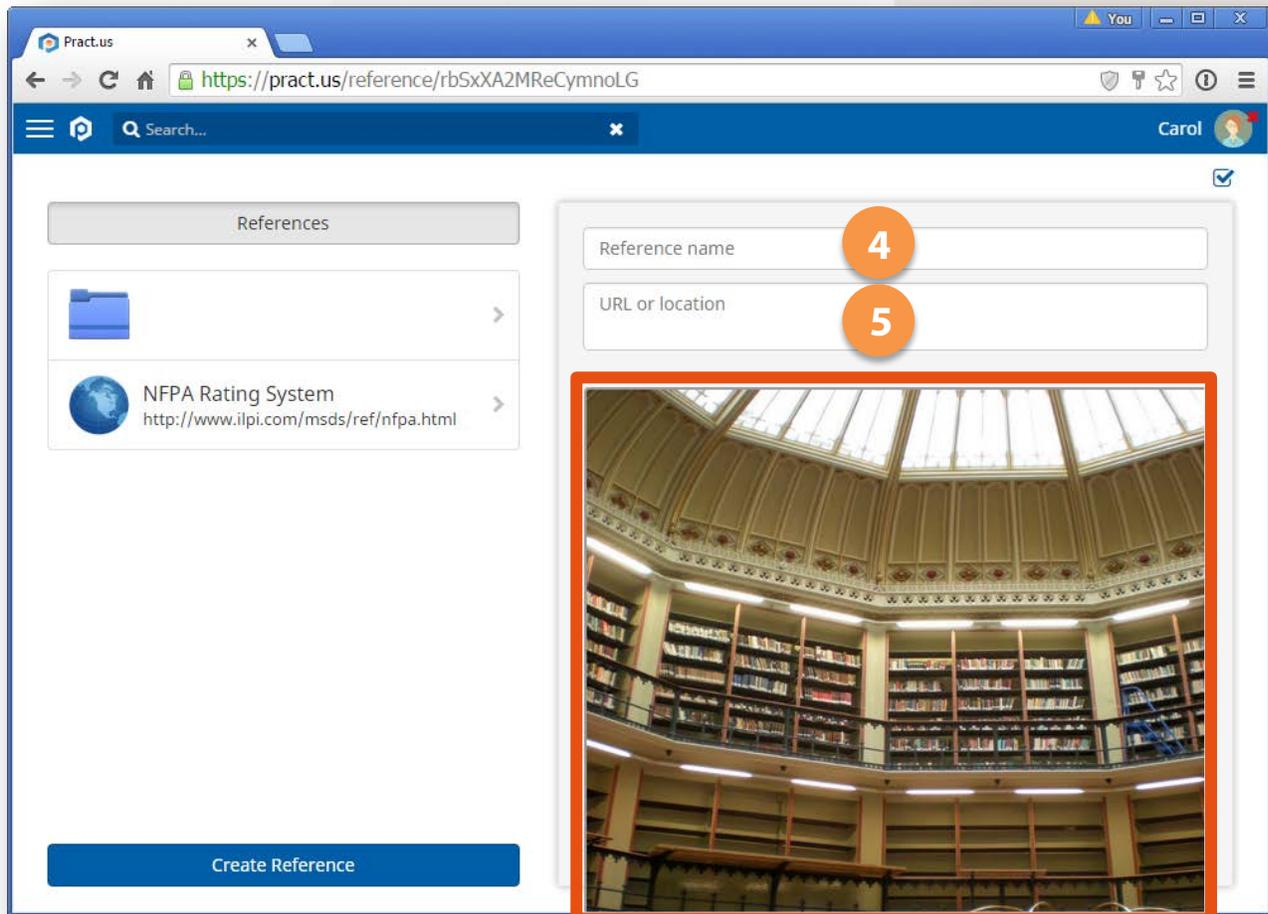


*Going to the References view*



*Creating a new Reference*

2. Select **Create Reference** as shown in the **orange** rectangle above.
3. You should see the New Reference view below (the numbered orange circles are used for reference here - they aren't part of the view):



*The parts of a Reference*

4. Enter a **Reference Name**. Remember that the Reference Name is the “title” of the reference and will be shown in larger letters in all lists. So try to keep your names as concise as possible.
5. Enter a **URL or Location**. If a valid URL is entered, Pract.us will assign the globe icon  to the reference. If any other type of location is entered (other than a URL), Pract.us will assign the folder icon  instead.
6. If you entered a URL in the previous step, Pract.us will also attempt to connect to that online resource and display the webpage in the large window (the **orange** rectangle above). If the online page can't be reached or loaded, a generic picture of a library will be used instead.
7. Once you've finished creating the new reference, select **Save**  in the upper right corner. Once saved, the reference can be used in any skill.

**Getting Help**

- For more help using Pract.us, see our Support Site: [support.pract.us](https://support.pract.us).
- You can also email us at [support@pract.us](mailto:support@pract.us)