TEAM Software
by WORKWAVE

Staff Training

TEMPLACMS

Version: v.6.1.0 (May 2018)

COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

TABLE OF CONTENTS

OVERVIEW

Staff Training

As new staff join, or throughout their employment, there will be requirements for induction and training. This may be site-specific, or generic, and some items may have an expiry date, thus requiring refresher training at a later date.

The completion of training will build a historical training record for every employee in the company. At any point in time, therefore, it should be possible to interrogate live and historical **training records** across the company to see which employees currently hold certain skills or accreditations.

The request for training to occur, and therefore the completion of **training forms**, is an entirely ad-hoc process that is as follows:

- A **training form** is created (from the filterable training forms list) for an employee and optionally for a site, nominating a pre-built **training (forms) template**
- When the **training form** is posted, it is sent into the workflow for assignment and completion.
- The assigned completion user confirms the necessary details on the **training form** and sends it on for approval or processing.
- On processing a **training form**, the employee **training record** is updated with the completed **training items**.
- The process is iterative, meaning the same **training form** can be issued many times for the same employee, to complete missed or repeat expired **training items**.

INTRODUCTION

These training session notes are designed to provide background information and useful hands-on experience of using the Staff Training CMS functionality. These notes are designed to complement the training and assist you at a later stage when away from the training environment.
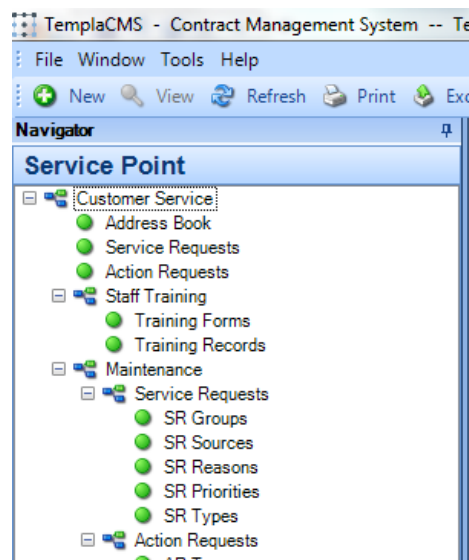
SYSTEM

License

The Customer Service (CS) module is separately licensed so a relevant license key must be obtained from Templa and applied to Templa-CMS.
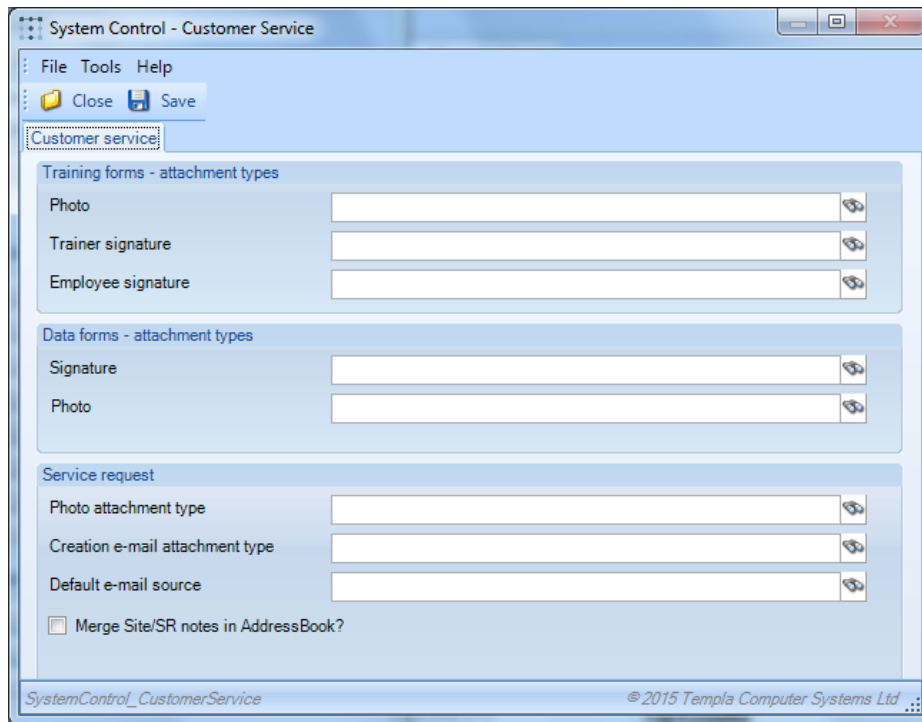
Menu structure / Navigator

The following default menu structure containing all Staff Training options exists on the Service Point menu:

System Control

CUSTOMER SERVICE TAB

The **Customer Service** tab on the System Control maintenance option should be reviewed and completed, as necessary. All these fields are used in conjunction with mobile integration.

The relevant attachment types should be associated with the relevant areas of Customer Service. Indeed, where mobile is in operation, it is imperative that default attachment types are defined here for all areas actioned on the mobile and that these attachment types must have the relevant level of permissions (i.e. Add) for the user role controlling the inward synchronisation of items back from the mobile into Templa-CMS, as it is at this point that these defaults are utilized. In addition, this same user role must be assigned to the necessary 'Document Management' function groups.

Functions & Function Groups

There is a vast range of **functions** to cover Staff training options. These have been grouped into the following **function groups**:

- *TRFORM Training Form Functions
- *TRFORMV Training Form Functions – View

It is up to the Templa-CMS system administrator to add these (or other bespoke) **function groups** into their existing **function group structure** so that only the relevant users see the relevant ST options.

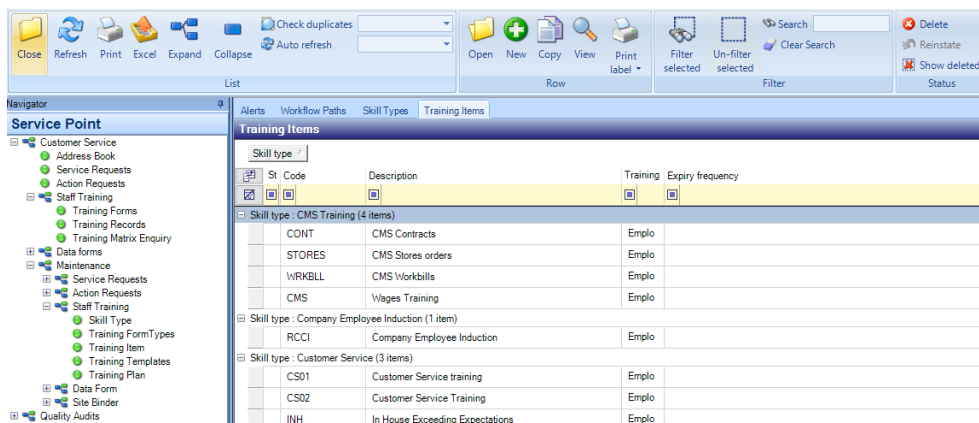# MAINTENANCE

Staff Training

SKILLS TYPES

Each **training item** must belong to a **skill type**, where the **skill type** allows the classification of **training items** into logical groups, e.g. floor cleaning, health and safety, etc.
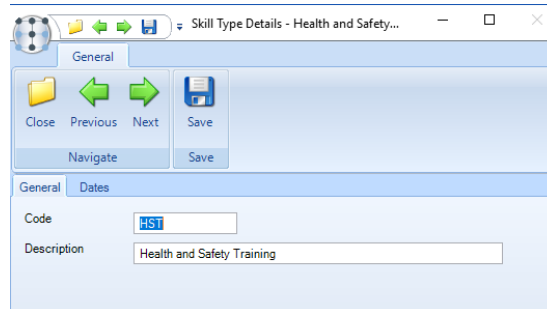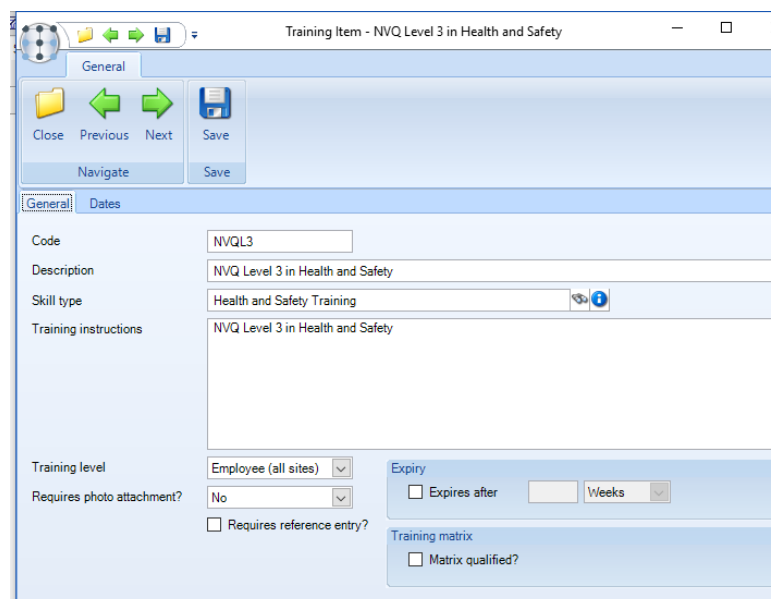

TRAINING ITEMS

Training items belong to **skills types** so can be grouped as such:

Training items are the lowest level of training to be recorded, e.g. polishing, buffing and general cleaning might all be **training items** assigned to the same more generic 'cleaning' skill type; alternatively, for other training there might be a one to one relationship:

Skill type – this must be defined (see previous sub-section)

Training instructions – multiple lines of text that will print on the **training form**

Training level – all **training items** must be associated with an employee (relates to all sites the employee works on) or a site (specific to just one site)

Requires photo attachment? / Requires reference entry? – if a particular training item results in a certificate or accreditation reference, then marking the **training item** as 'requires reference entry?' will ensure this is captured during the training form completion process; similarly, a photograph of a certificate could be required by specifying 'requires photo attachment?'

Expiry – training items can be optionally set to expire after a certain frequency which can be specified in weeks, months or years

Matrix qualified? – specifies the training item as one to be displayed on the training matrix. Please note if a site-level item is set as 'matrix qualified?' it will only be displayed on the matrix where the specific site the **training record** is associated with is chosen on the selection tab (see subsection below)

TRAINING FORM TYPES

Each **training (form) template** must belong to a **training form type**, where the **training form type** allows the classification of **training (form) templates**, plus controls workflow approval requirements and user permissions.

Completed via workflow – checking this checkbox activates the workflow path field.

Workflow path – a valid **workflow path** with an internal type of 'training form completion' must be selected, if the 'completed via workflow' is checked.

Enabled on customer portal? – checking this box indicates that **training (form) templates** associated to this **training form type** will be viewable on the customer portal

Enabled on mobile? – checking this box indicates that **training (form) templates** associated to this **training form type** will be usable/ viewable on the Templa mobile app

Permissions – these must be defined so the associated **training (form) templates** can be restricted to specific user roles or assigned to all user roles, as with attachment types

TRAINING (FORM) TEMPLATES

Any number of **training (form) templates** can be defined, where each one has a combination of header information and internal content:

Header Information

Training form type – this must be defined (see previous sub-section)

Overriding workflow path – this is an optional override from the **workflow path** defined on the **training form type**

Document header text – optional text that can be entered here to print at the top of the staff training form

Certificate document template – select document template (certificate) to be emailed upon completion of a **training form** created from this template if either email to employee or BA user are selected this is mandatory

Certificate letter document template - select a letter which should be sent with the above defined certificate. Please note it will only be possible to select this if a 'certificate document template' is selected.

Print style – options of 'portrait' or 'landscape' currently exist

Print with attached images – when printing the resulting **training form**, this checkbox determines whether any attached images are also printed

Lines per page – the number of lines on the page for a **training form**; this will depend on the *print style* where 52 is the maximum for 'portrait' and 33 for 'landscape'

Binder attachment type – if the '*Add to Site Binder*' has been checked, then a binder attachment type (with its associated user role permissions) must be specified. This will then result in a PDF version of the completed training form being placed in the site document store, using the nominated attachment type, and marked as 'in site binder'.

Allow multiple employees? – checking this box will allow multiple employees to be selected as attendees on the resultant **training form**

Ad-hoc training items? – allows users to add already created **training items** to the **training form** when completing it

Auto email certificate on completion:

- *To employee(s)?* – emails a certificate to all employees assigned to a **training form** when it is completed
- *To BA user?* – emails a certificate of completion for each employee to a specified BA level, the user to receive the email is determined by the corresponding user on the site BA level.

Linked training template – selecting a template here will cause it to be automatically generated on either the main system or mobile device upon completion of a **training form** associated with this template

Internal Content
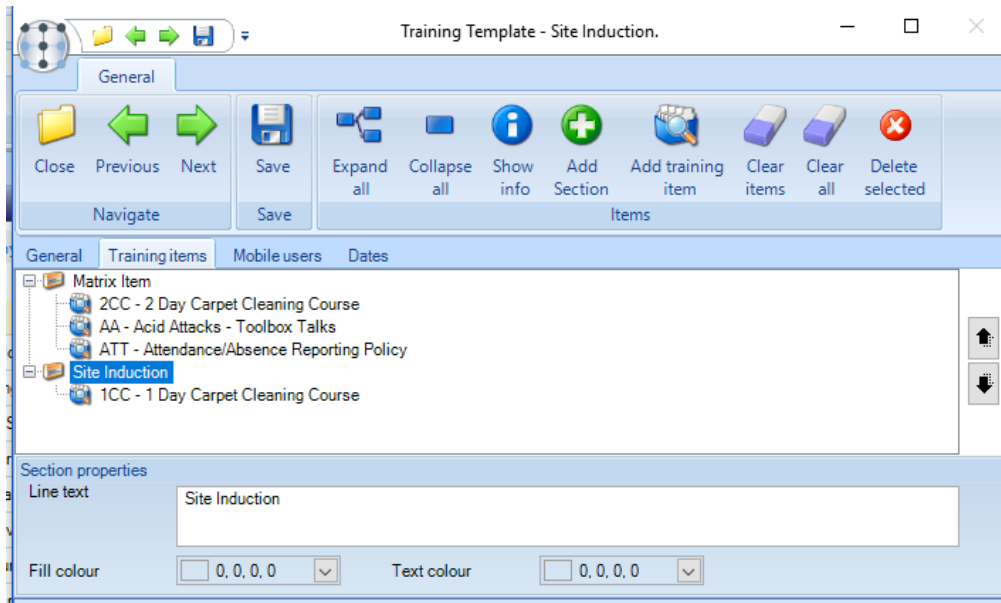
Add Section – sections must be added before **training items** are assigned; sections (and their **training items**) can be deleted via the **Delete Selected** button or by right-click, where they can also be renamed.

Add training item – training items can be added to any section; however, the same training item cannot be used more than once on the same training form template, although it may appear on multiple training form templates. Training items can be deleted via the **Delete Selected** button or by right-click, plus can re-sequenced using the up & down arrows on the right-hand side of the screen.

Section properties – line text will appear on the subsequent training forms, including on the mobile version, where the *fill colour* and *text colour* will also be used.

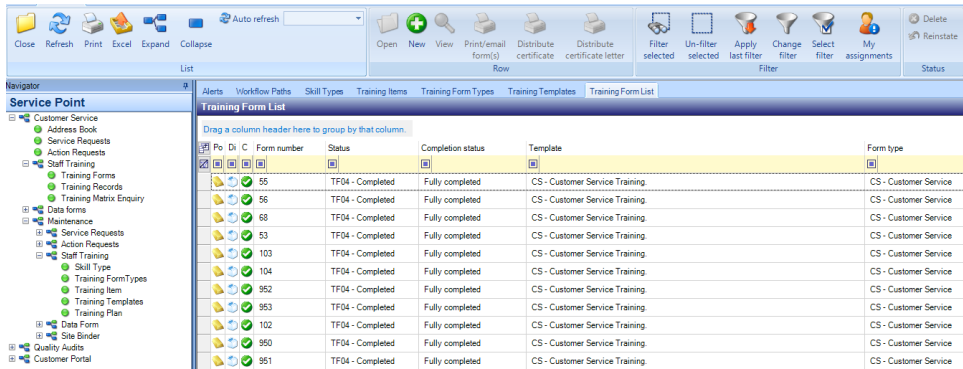# WORKFLOW

Workflow Paths

The following new workflow path 'internal types' are available for training forms.
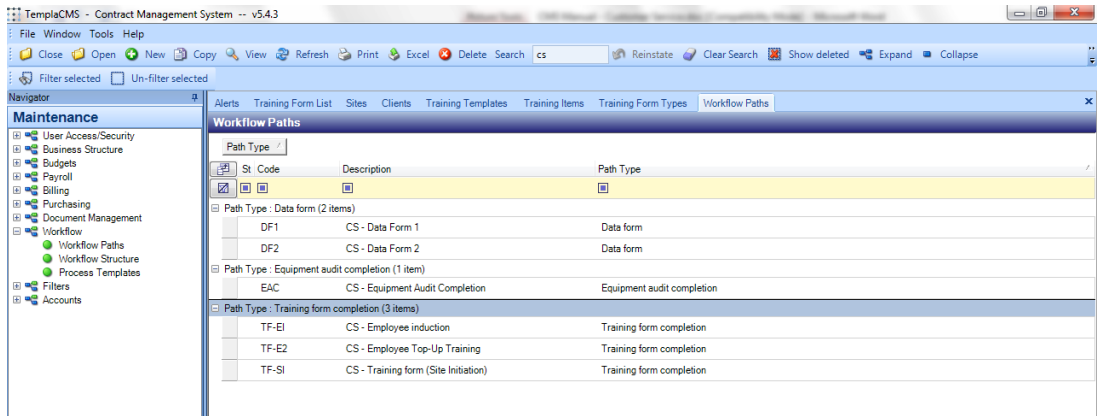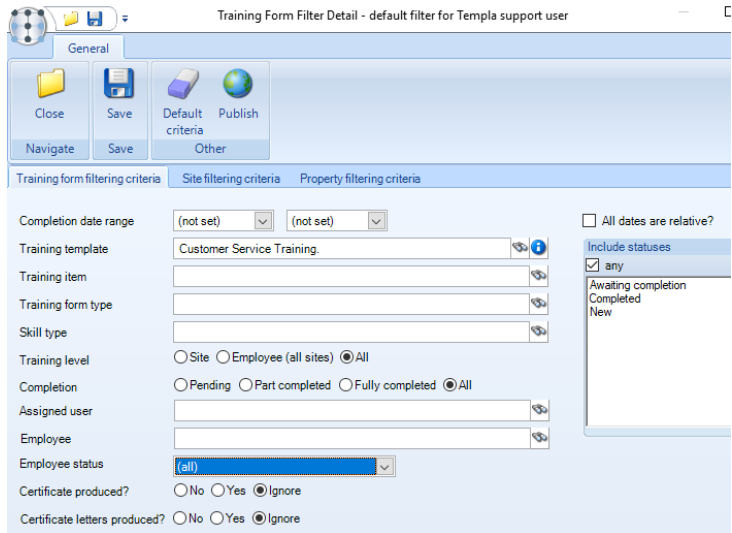

STAFF TRAINING

Training Forms

TRAINING FORMS – LIST & FILTER

This filterable list has a similar level of filtering, as provided elsewhere in TemplaCMS, so in addition to the normal filters – i.e. client, site, business analysis and marketing analysis, plus both site and employee user-defined properties – the following **training form** specific filters can be used.

Pre-filtered access to the training forms is also available from a site, contract or employee.

TRAINING FORMS – NEW

Site – this is optional, whereas *Employee* is mandatory

Training (form) template – this must be entered and must be a training (form) template the operator has permissions to.

TRAINING FORMS – POST

Once the details have been entered, the **training form** must be posted to activate it; multiple **training forms** can be selected at once from the **training form list** for posting.
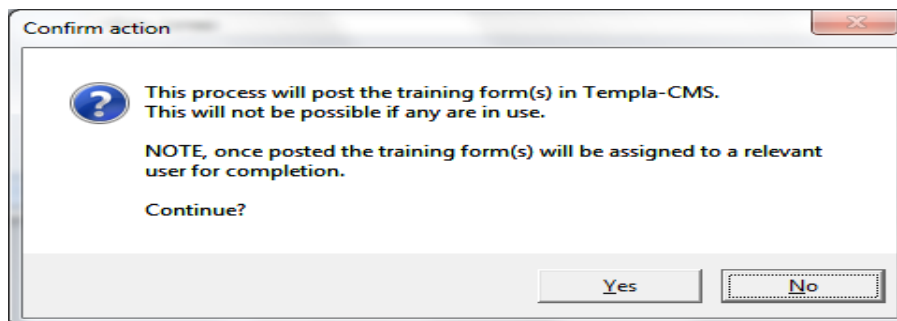
Once posted, the relevant **workflow path**, as optionally defined on the **training (form) template** or else taken from the **training forms type**, will be used to route the **training form** to the appropriate user. If the resulting posted **training form** is unassigned or needs to be re-assigned, then this can be resolved in the normal manner via the Workflow Manager option.

Furthermore, posting the **training form** will generate the necessary structure of **sections** and **training items**. Where an employee already has a given **training item** on their **training record** that is either relevant to the specific site, or to the employee as a whole, the details of this **training item** will be automatically populated, including any photo attachment.

TRAINING FORMS – COMPLETION & SIGNOFF

Once the **training form** has been assigned to a user, then it can be completed, either on the main Templa-CMS system or on the mobile device. The completion screen will display the **sections** and **training items** to be completed, each of which requires the complete column to be updated from 'Pending' to 'Yes' or 'No' and a date entered in the date column:

Where **training items** have been set up to demand a photo or reference, this will be highlighted in the comments if one or both of these details have not been entered – once supplied the comments update:

Comments and attachments can be added to any **training item**:
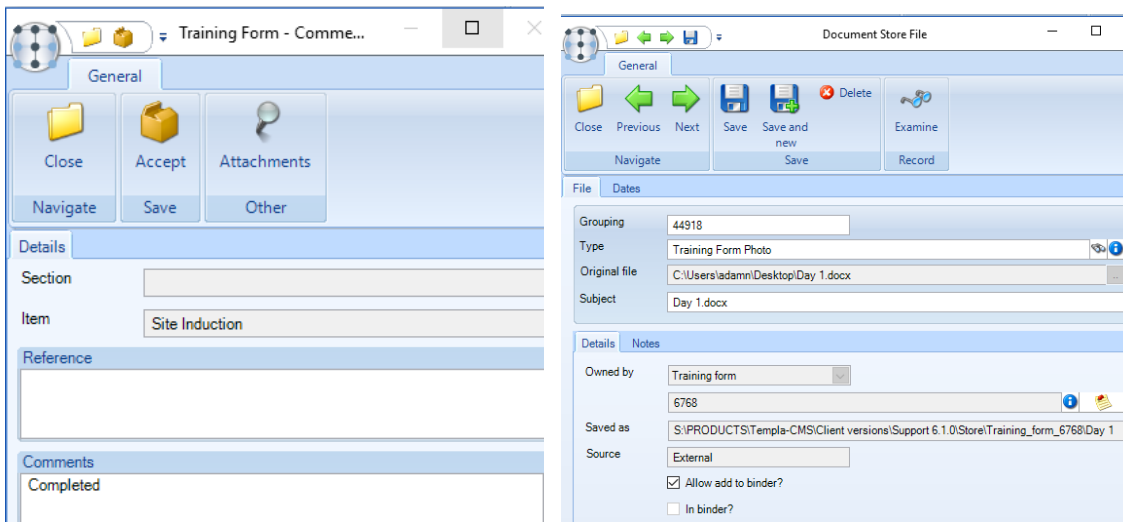
Once the dates have been entered on the completion tab, the signoff details need to be entered on the signoff tab, although obviously signatures can only be entered via the mobile application. The **Send On** button will only display once all **training items** have been fully completed (i.e. references and attachments, as required) and the signoff details entered:
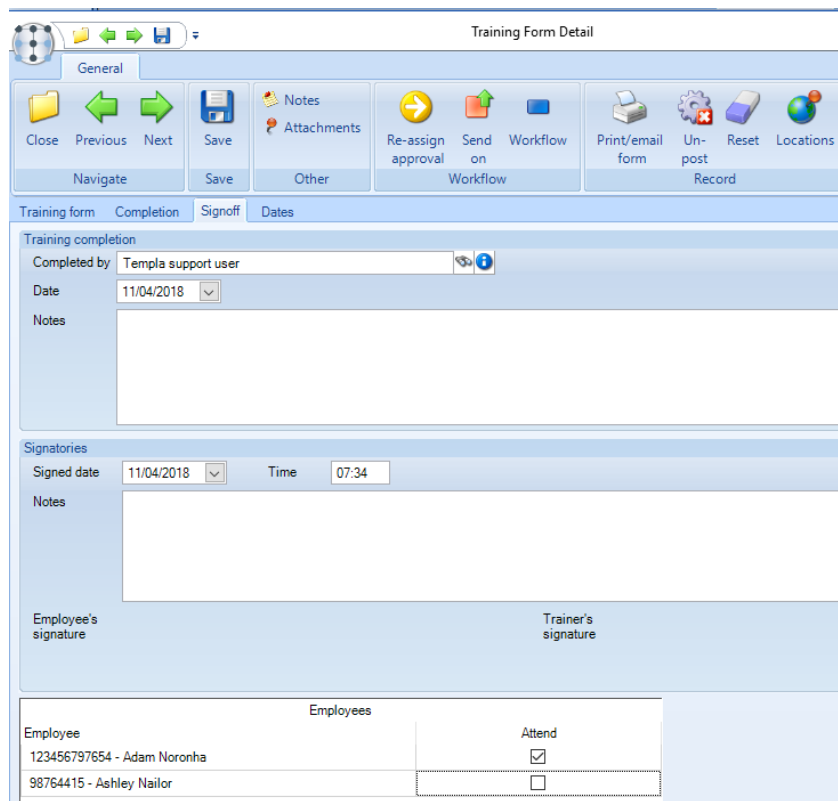

The following message will be displayed on clicking on the **Send On** button:
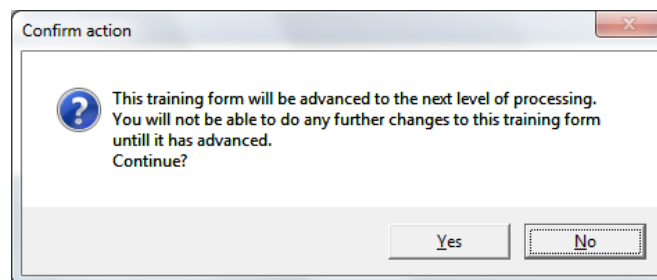
The 'next level of processing' (noted above) will only exist if the workflow path has further stages; if not, the **training form** status will be advanced to 'Completed' by workflow yet the '**Completion Status**' will be changed from 'Pending' to 'Fully completed' if all **training items** were marked as completed (i.e. 'Yes') or to 'Part completed' if any **training items** were marked as not completed (i.e. 'No') when the completion tab was entered:

All completed **training items** will update the employee's **training record** – see next section.

TRAINING FORMS – UN-COMPLETE

Once completed it is possible to un-complete any training form via the **Un-Complete** button on the training form header which will prompt the following message:
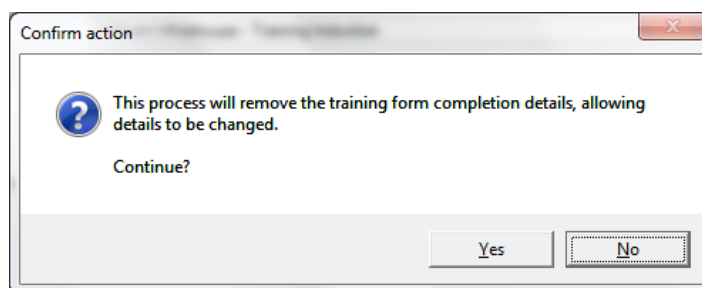
TRAINING FORMS – PRINT & EMAIL

A PDF version of the **training form** can be generated for print or email at any point on a posted **training form**. Thus, the **training form** can be completed on paper and then entered into TemplaCMS at a later stage. When printed it takes into account the settings on the **training (forms) template**.

Print date: 23/04/2014
Training form No: 98
Employee: Whitehouse William
Client: ABP001 - New Client Ltd
Site: ANS001/1 - A New Site

TEMPLA Demo System
156 Tonbridge Road
Hildenborough
Kent
TN11 9HW
GST reg: 907 1431 48
Phone: 01732 832888

Training Form - William Whitehouse - Training Induction

	Complete?	Date	Reference/comments
Health and Safety			
Health, safety and welfare	Yes	09/04/14	
Accident and Incident reporting	Yes	09/04/14	
Moving and Handling guidelines	Yes	09/04/14	
Control of Substances Hazardous to Health	Yes	09/04/14	COSHH/123456
Safety signs	Yes	09/04/14	
Machinery			
Machine care and maintenance	Yes	10/04/14	VAC/5L
Checking for damage	Yes	10/04/14	
Environment			
Water conservation	Yes	09/04/14	REF/121235/JMB
Electricity conservation			
Recycling	Yes	09/04/14	

Completed by | **Signed by (trainer)**
Templa |
Completed date | **Signed by (employee)**
10/04/2014 | **Signed date/time**
Notes | 10/04/2014 14:00
Notes | **Notes**

Page 1 of 1

TRAINING FORMS – AD-HOC CREATION

Training records are automatically derived from the training forms completed for a given employee. Whilst most training takes place in a planned and structured way, there may be occasions when ad-hoc training is undertaken and therefore needs to be recorded.

To facilitate this, the option for **Ad hoc training record** can be used. This button is available on the 'training record list' accessed for an employee, site, or via the navigator:
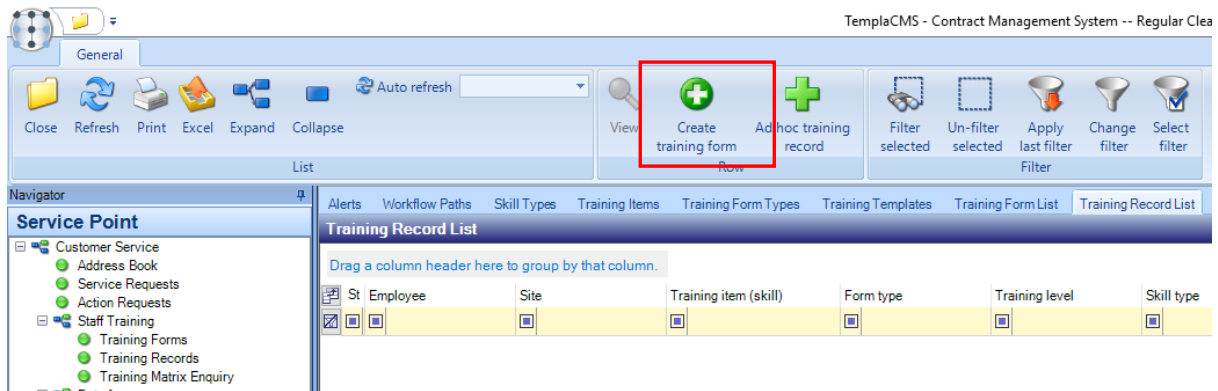
When pressed this will prompt the user to complete simple details of the training that has taken place:

On acceptance, the supporting training form is automatically created and completed to generate a training record.

Training Records

Each completed **training item** (i.e. marked 'Yes') from a completed **training form** will be added to the employee **training record**. Where a **training item** already exists for this employee/(site), and the details have been changed on the latest **training form**, the original **training item** will be marked as superseded, and a new **training item** will be added. In this way, a full history of completed **training items** will be maintained. Conversely, if a pre-existing item has not been changed on the **training form** (i.e. marked 'No') then these **training items** will not create a new **training item** on the employee's **training record**.

All records can optional been displayed on the Templa mobile app (please see the mobile set up document for further information.)

As with the **training form list**, it will be possible to create new **training forms** from the **training records list**. This filterable list has a similar level of filtering, as provided elsewhere in TemplaCMS, so in addition to the normal filters – i.e. client, site, business analysis and marketing analysis, plus both site and employee user-defined properties – the following **training record** filters can be used:

Attained Date Range – this will allow the filtering of training records based on when the training took place, the list will normally be used to return current (not expired) **training records**.

Include expired records 'as at' date – if access to expired records is required – e.g. to see how many first aiders existed at the start of the year – this can be achieved by use of the 'as at' date.

Include superseded? – this allows the user to view the training records at a given point in time when used in conjunction with the "*Include expired records 'as at' date*" option.

Staff Training Forms/Records – Appearance Elsewhere

When looking at a contract, site or employee it is possible to drill down into their staff training form (and data form) details:
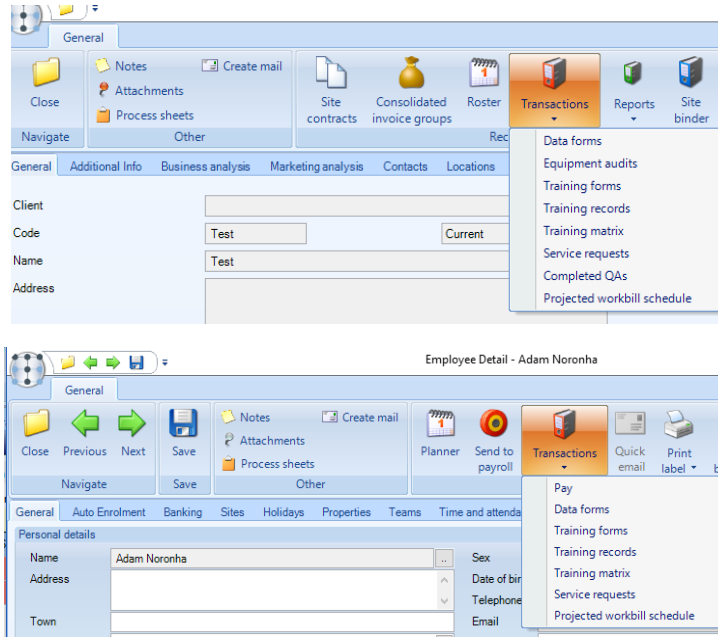
A list of staff training forms or records (or data forms) is provided, from which the user can drilldown into the specific details, as required:
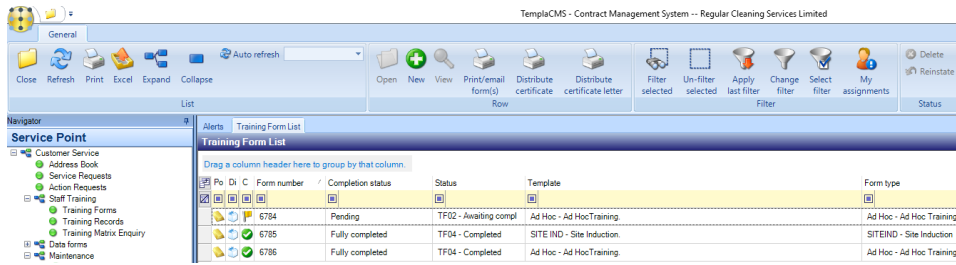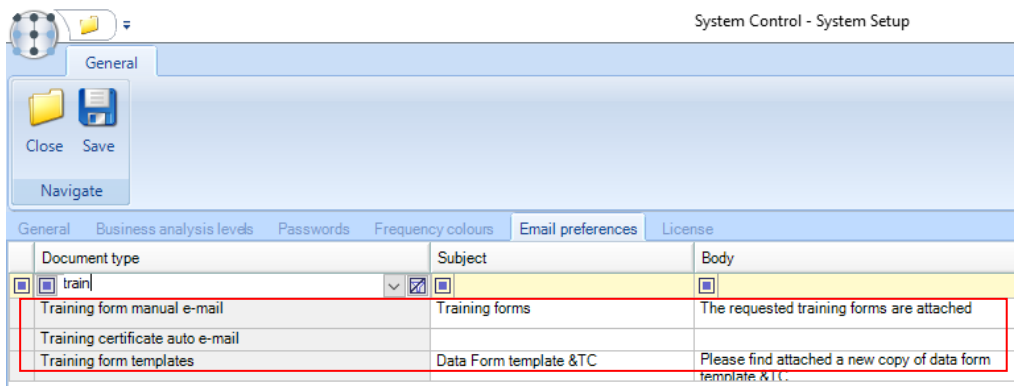

Automated Emailing of Training Certificates

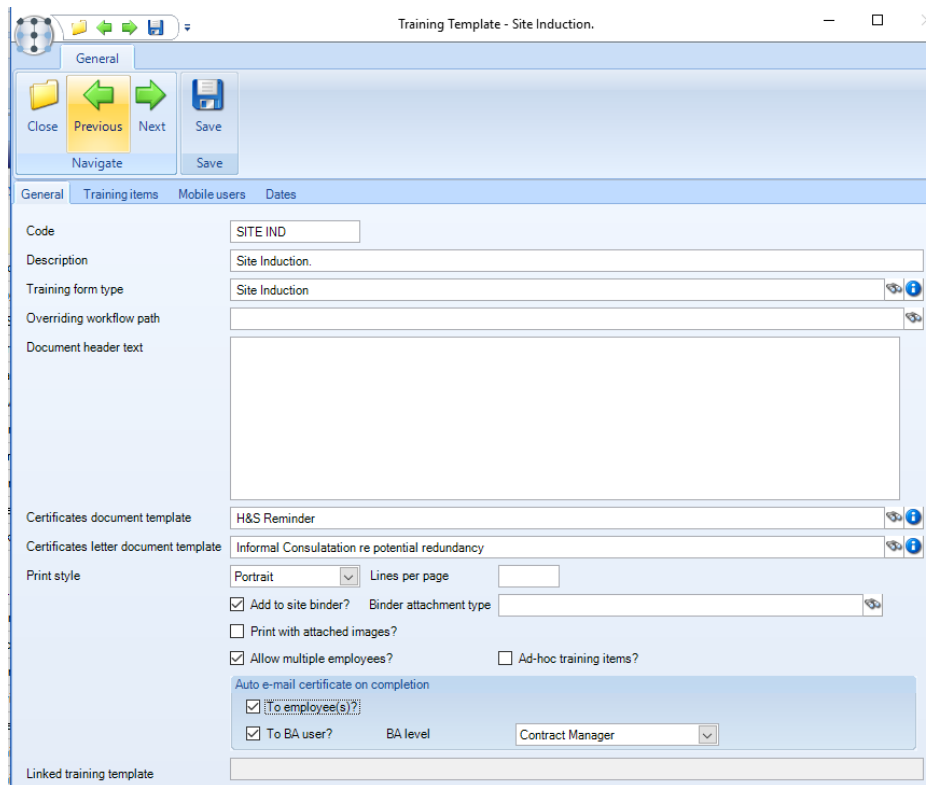Training certificates can be automatically emailed on completion of a training form.

EMAIL PREFERENCES

Email preferences for **Training certificate auto e-mail** can be setup from the Email preferences tab available on the **System Control** menu which allows for the configuration of email subject, body and sender

As with other email preferences, appropriate substitution variables can be used here. On installation, these fields will be blank, so it is down to the relevant user to set the initial text.

TRAINING TEMPLATES

Automatic emailing is configured on the **training template** and will control all training forms created using that template. A template can be set up to e-mail the certificate to the employee(s) and/or the user defined on a selected site business analysis level (e.g. Area Manager).

TRAINING FORM COMPLETION.

Once a training form is signed off and completed, the appropriate email(s) will be sent. If the training form type is flagged for 'Complete by workflow' then the email(s) will only be sent once the training form has been completed in workflow.

TRAINING PLANS AND THE TRAINING MATRIX

TemplaCMS allows users to create bespoke **training templates** containing multiple items. These are then completed for employees at a site to create a record of the training undertaken by each employee.
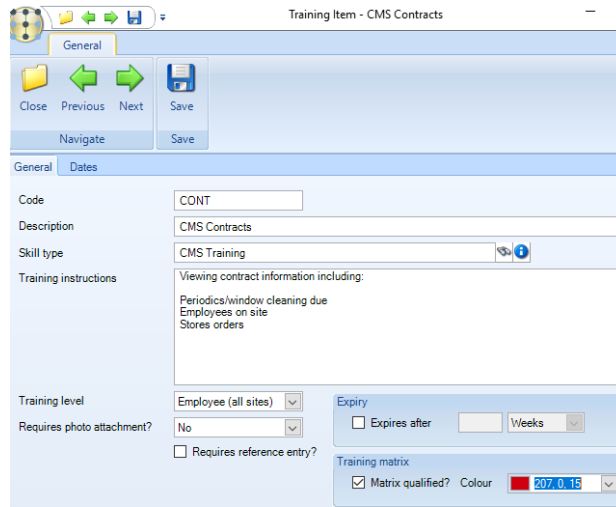
The level of training items used on the templates may be very specific, and the accumulation of these will ultimately result in the employee being qualified to work as a cleaner, a supervisor etc.

The definition of **training plans** allows **training items** to be viewed across sites, clients, areas (etc.) as a 'training matrix' showing the skill levels of all employees.

Where the **customer portal** module is in use, this matrix can optionally be made available to your customers.

TRAINING ITEMS AND PLANS

A training plan is a collection of **training items** that the administrator has decided are the key qualifications for use on the matrix. Before creating a training plan, the relevant **Employee level training items** must be created and identified as **Matrix qualified?**:
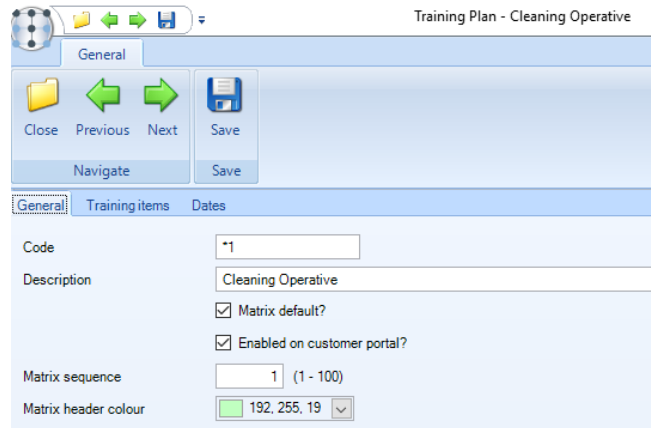
Each training plan identifies the following details:
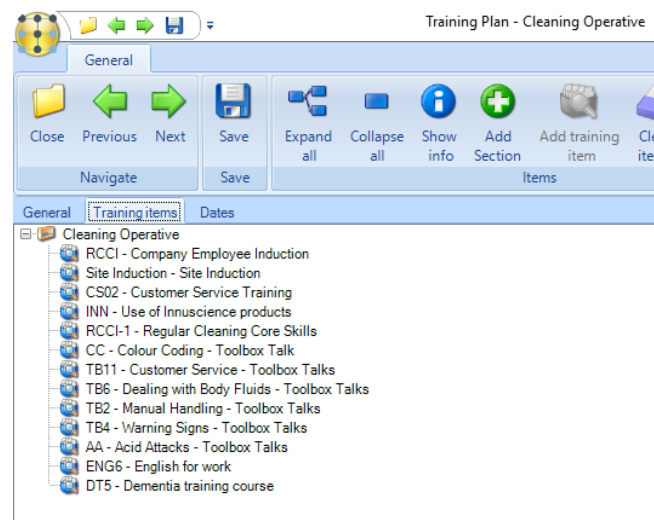
Along with a sequenced list of the items that make up the plan:

Whilst the **training items** used on a plan are specifically identified as **matrix qualifications**, they are in effect no different to any other training item in their use – i.e. the employee achieves the qualification by the item being manually completed on a training form in the normal way.

MATRIX ENQUIRY

The training matrix enquiry can be accessed from the **Staff training** menu, or from the toolbars of the client, site and employee. When selected, the user may specify the following criteria:
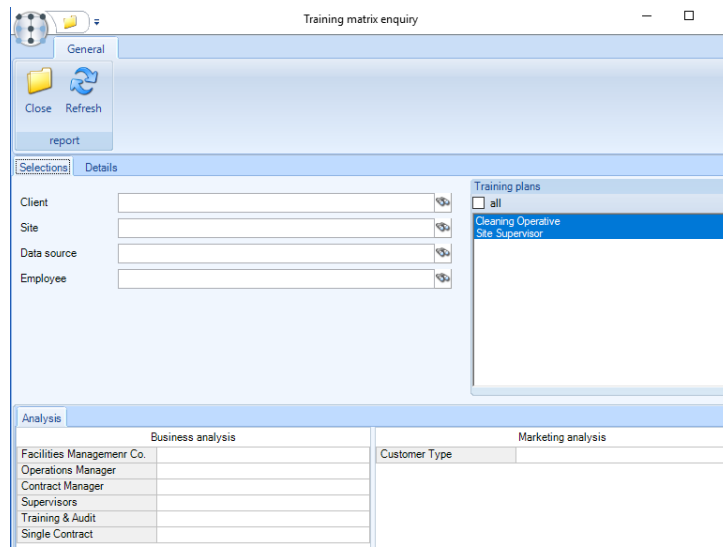
Those plans identified as the **Matrix default** are pre-selected, though there may be other plans defined that can optionally be included. On progressing to the details tab, the appropriate employees are identified, and a grid built that plots their qualifications against the selected training plans:

CUSTOMER PORTAL

Access to the training matrix for the client and site can be defined at the system level with overrides for each client registration.

Within the portal website, access to the matrix is via a button on the client and site pages. Unlike the server, there are no selection criteria to enter, so the matrix is immediately displayed including all plans that are enabled for the customer portal:

TRAINING FORMS/ RECORDS ON CMS MOBILE

Training forms can be created and completed on a mobile device, e.g. iPad or Android tablet. The configuration of TemplaCMS for this purpose is covered in another document: **TemplaCMS Mobile Gateway**.

Training Forms

- Separate **To do** and **All** tabs exist
- Uploaded **Training forms** list can be searched, if required
- **Training forms** are "read-only" if:
  - already completed
- **Training forms** have tabs for:
  - *Header* – general information
  - *Results* – this is where the **Training form** must be completed i.e. All items set to '*yes*' or '*no*' with a date set:
  - *Sign off* – A signature will be required from the trainer and all assigned employees

Training Records

Training records will be accessible from both the employee and site managers:

- **Employee manager:**
  - A **Training records** menu is available under the transaction heading of the main Employee Manager list. When accessed at this level, all employee level training records for all employees on the device
- **Site manager**
  - A **Training records** menu is available under the transaction heading of the main Site Manager list. When accessed at this level, both employee level and site level training records for all employees

GLOSSARY

Training Forms

Skill type – allows the classification of ***training items*** into logical groups, e.g. floor cleaning, health and safety, etc; each ***training item*** must be assigned a ***skill type*** and ***training level***

Training form – the resultant ***training form*** for the selected employee and site, built from the selected ***training (form) template***

Training form type – allows classification of ***training (form) templates***

Training (form) template – the design of a ***training form***, requiring a ***training form type***, printing criteria and the assignment of ***training items*** grouped into areas

Training items – this is the lowest level, i.e. the individual training elements

Training level – defines what level a ***training item*** is applicable to, i.e. site or employee

Training record – the composite result of completed ***training items*** for a given employee or employee/site, i.e. if an employee undergoes training on the same site and ***training item*** multiple times, a single ***training record*** will be maintained

Training plan – a specifically identified list of training items that will allow an employee to advance from one job role/level to the next

Training matrix – a collection of optionally defined training plans which indicates how different employees are progressing from one plan to another