

# Staff Training

## TEMPLACMS

Version: v.6.1.0 (May 2018)



# COMMERCIAL STATEMENT

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# 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.

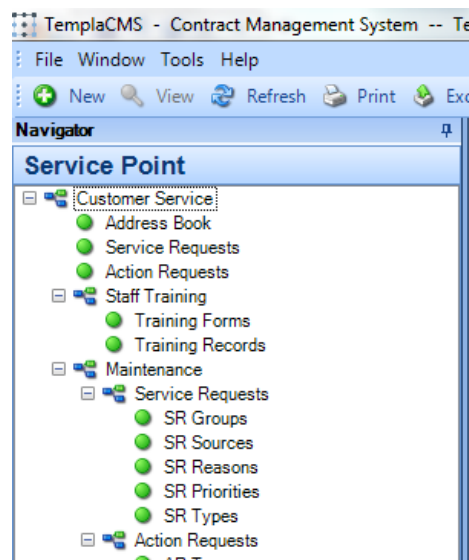
## SYSTEM

### 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

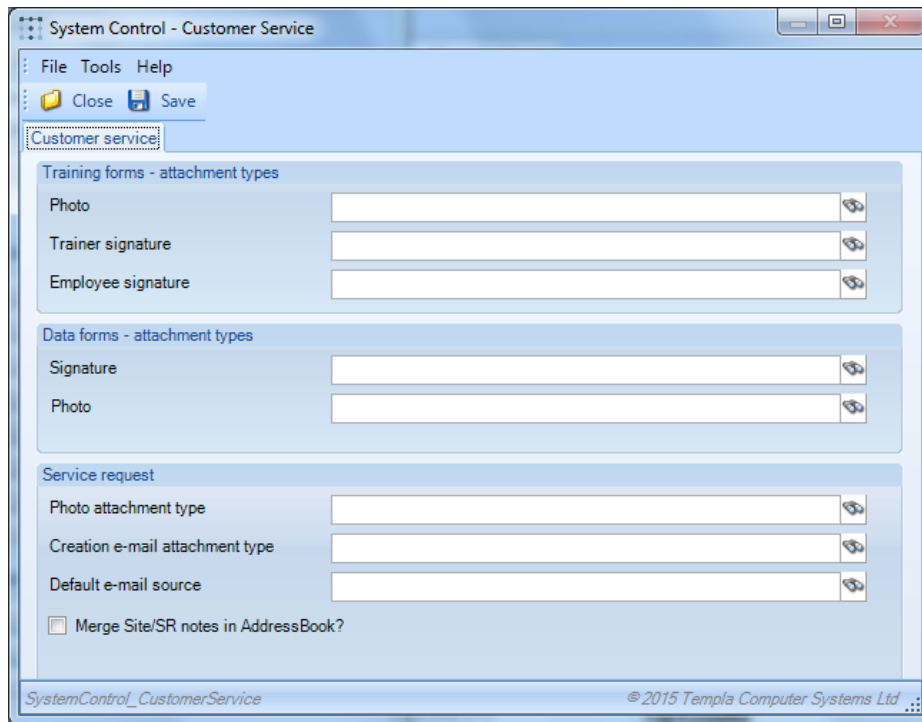
The following default menu structure containing all Staff Training options exists on the Service Point menu:



# 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
- \*TRFORMVTraining Form Functions – View

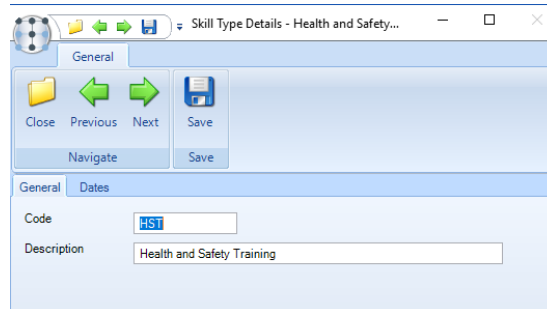
It is up to the Templa-CMS system administrator to add these (or other bespoke) **function groups** into their existing **function group structure** so that only the relevant users see the relevant ST options.

# MAINTENANCE

## Staff Training

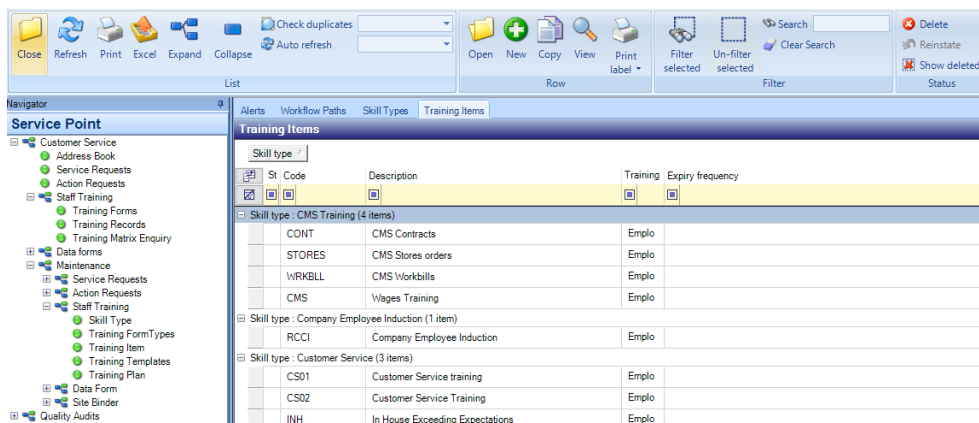
### SKILLS TYPES

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.

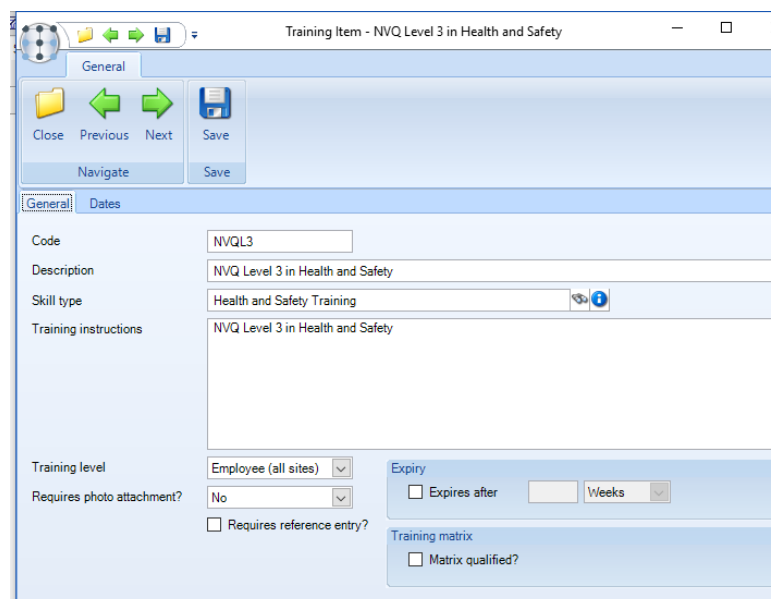


### TRAINING ITEMS

**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.

The screenshot shows a software interface for configuring a 'Training Form Type'. The title bar reads 'Training Form Type Details - 1 Day Hard Floor'. The interface includes a 'General' tab and a 'Permissions' tab. The 'General' tab contains the following fields and options:

- Code:** 1HF
- Description:** 1 Day Hard Floor
- Complete via workflow?:**
- Workflow path:** Customer Service
- Enable on customer portal?:**
- Enabled on mobile?:**

Navigation buttons include 'Close', 'Previous', 'Next', and 'Save'.

*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

The screenshot shows a software window titled "Training Template - Site Induction." The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with icons for Close, Previous, Next, and Save. The main area of the window is divided into tabs: General, Training items, Mobile users, and Dates. The "General" tab is active, showing a list of configuration fields:

- Code:** SITE IND
- Description:** Site Induction.
- Training form type:** Site Induction
- Overriding workflow path:** (empty)
- Document header text:** (empty text area)
- Certificates document template:** H&S Reminder
- Certificates letter document template:** Informal Consultation re potential redundancy
- Print style:** Portrait (dropdown), Lines per page: (empty)
- Add to site binder? Binder attachment type: (empty)
- Print with attached images?
- Allow multiple employees?  Ad-hoc training items?
- Auto e-mail certificate on completion:**
  - To employee(s)?
  - To BA user? BA level: Contract Manager (dropdown)
- Linked training template:** (empty)

*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**

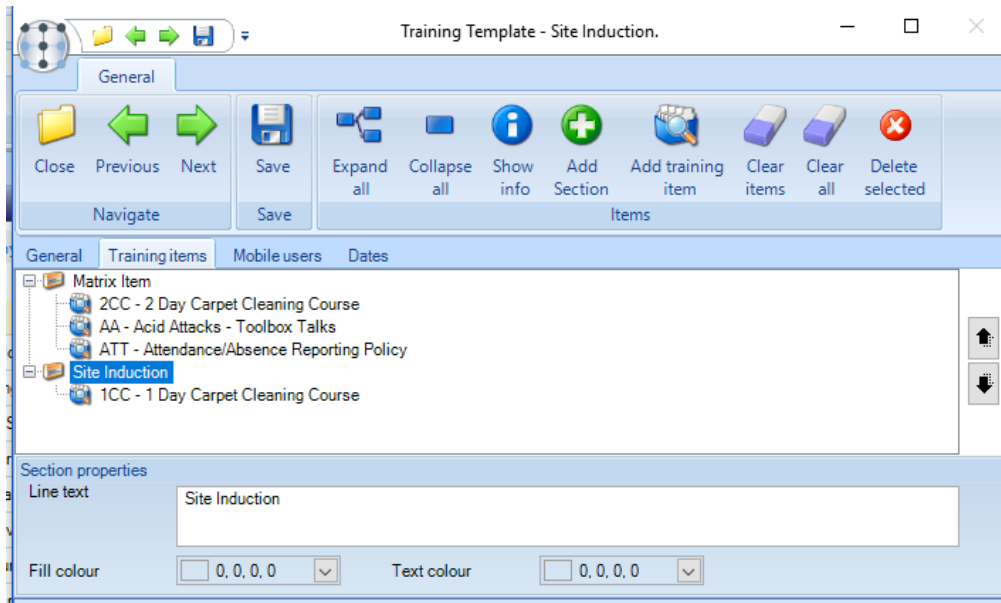
*Ad-hoc training items?* – allows users to add already created **training items** to the **training form** when completing it

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.

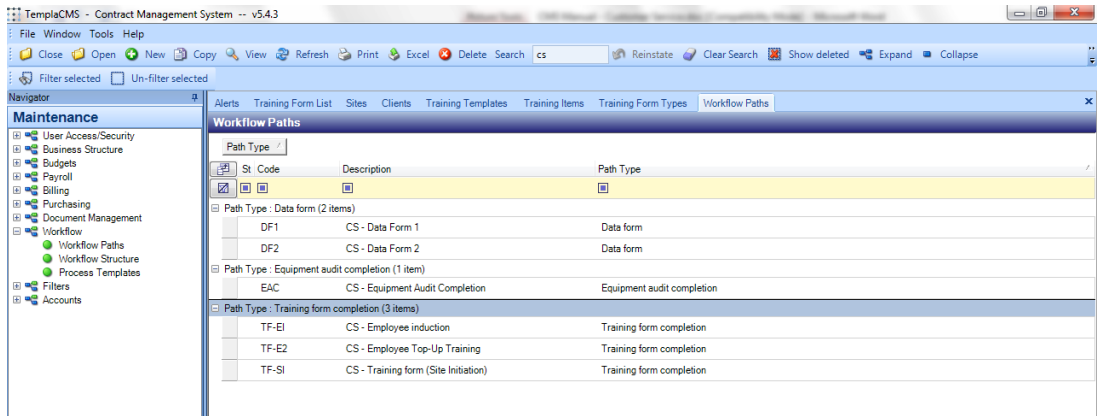
**Add training item** – training items can be added to any section; however, the same training item cannot be used more than once on the same training form template, although it may appear on multiple training form templates. Training items can be deleted via the **Delete Selected** button or by right-click, 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

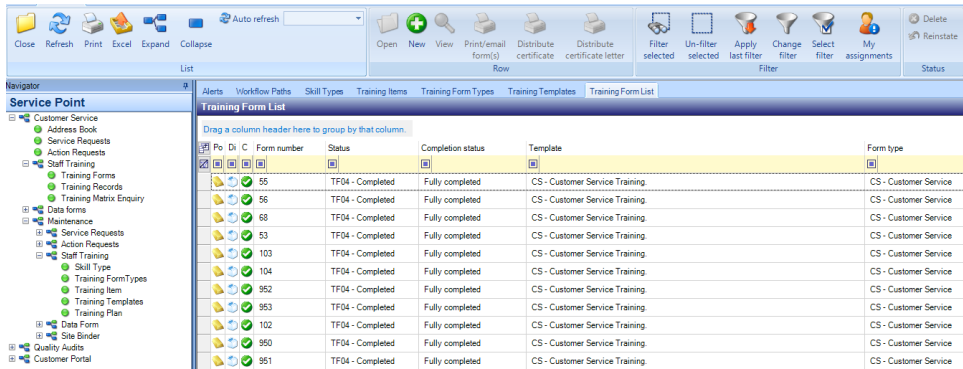
The following new workflow path 'internal types' are available for training forms.



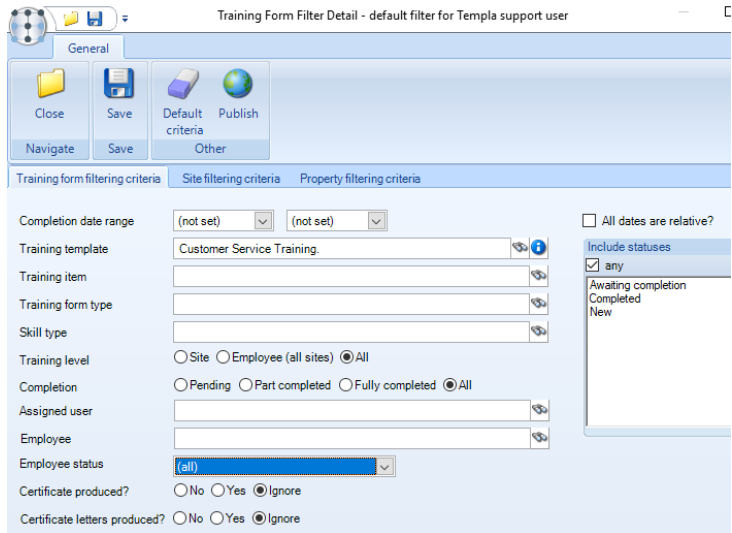
# STAFF TRAINING

## 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.

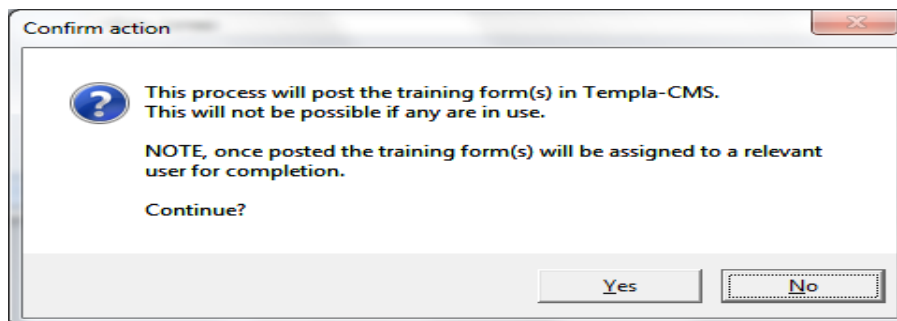
## TRAINING FORMS – NEW

*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

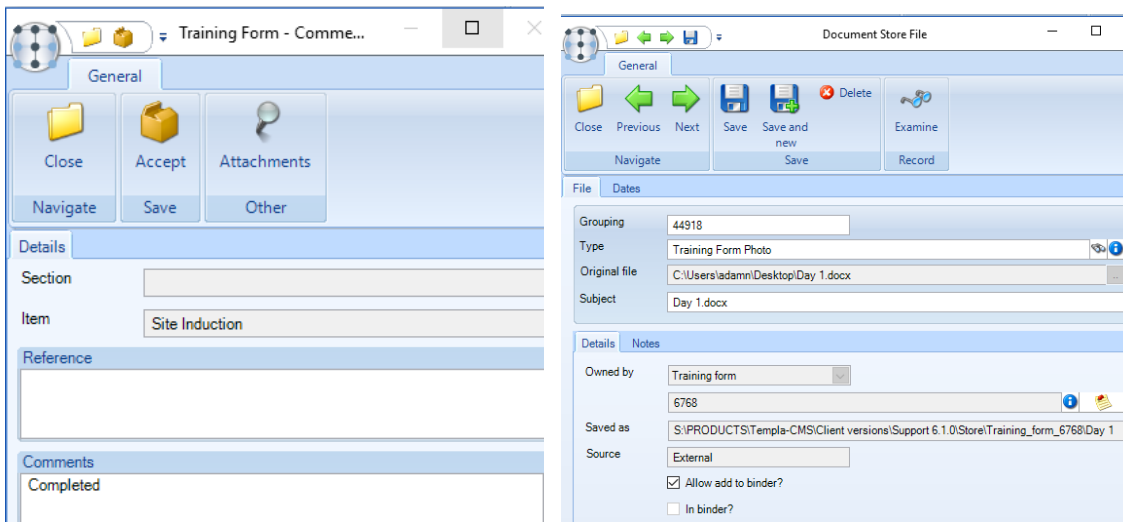
Once the **training form** has been assigned to a user, then it can be completed, either on the main Templa-CMS system or on the mobile device. The completion screen will display the **sections** and **training items** to be completed, each of which requires the complete column to be updated from 'Pending'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

	Complete	Date	Comments
Site Induction Record for Matrix	Yes	11/04/2018	
Site walk round, Introduction to colleagues	Yes	11/04/2018	
What the job entails and tasks to be performed, Copy of site specification or task card provided, Required standards of the job, Tools and Equipment to be used and PPE, Colour coding	Yes	11/04/2018	
Pay rate for job, Hours of work, Days of work, Line Manager and contact details	Yes	11/04/2018	
Comments book and its use, Policy regarding removal of rubbish or items surrounding bins, Signing in procedures and Security arrangements	Yes	11/04/2018	
Site First Aid Procedures - where the first aid box is and who is the qualified first aider	Yes	11/04/2018	
Site emergency/evacuation procedures	Yes	11/04/2018	

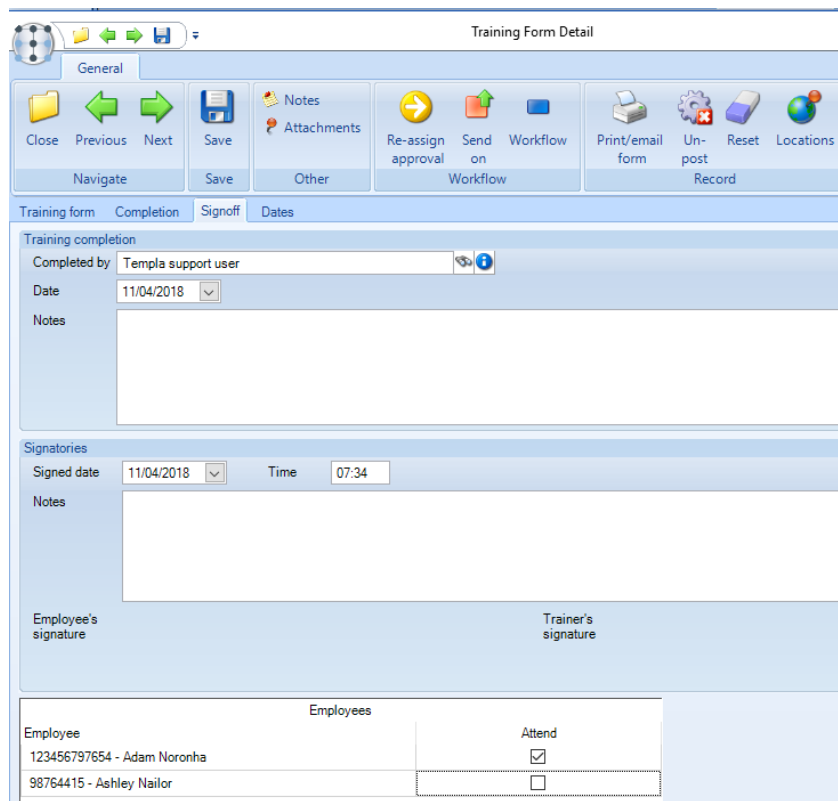
Where **training items** have been set up to demand a photo or reference, this will be highlighted in the comments if one or both of these details have not been entered – once supplied the comments update:

	Complete	Date	Comments
Site Induction Record for Matrix	Yes	11/04/2018	Completed
Site walk round, Introduction to colleagues	Yes	11/04/2018	
What the job entails and tasks to be performed, Copy of site specification or task card provided, Required standards of the job, Tools and Equipment to be used and PPE, Colour coding	Yes	11/04/2018	
Pay rate for job, Hours of work, Days of work, Line Manager and contact details	Yes	11/04/2018	
Comments book and its use, Policy regarding removal of rubbish or items surrounding bins, Signing in procedures and Security arrangements	Yes	11/04/2018	
Site First Aid Procedures - where the first aid box is and who is the qualified first aider	Yes	11/04/2018	
Site emergency/evacuation procedures	Yes	11/04/2018	

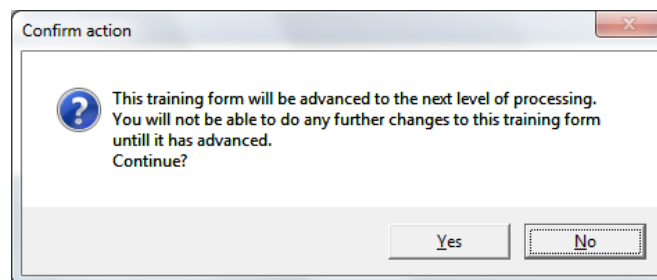
Comments and attachments can be added to any **training item**:



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:



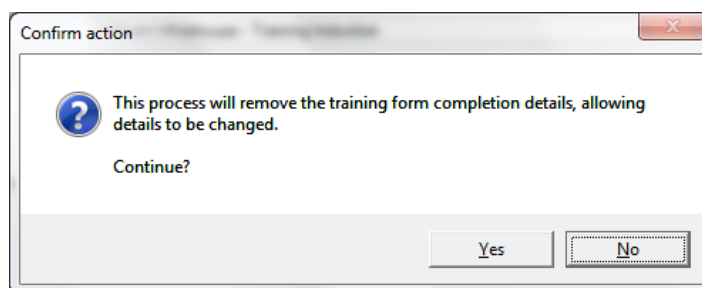
The 'next level of processing' (noted above) will only exist if the workflow path has further stages; if not, the **training form** status will be advanced to 'Completed' by workflow yet the '**Completion Status**' will be changed from 'Pending' to 'Fully completed' if all **training items** were marked 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:

Di	C	Form number	Status	Completion status	Assigned to	Template	Employee
>		80					900
		81	TF04 - Completed	Part completed		*14 - JHT staff induction training	900012 - Kruger Kate
		82	TF04 - Completed	Part completed		*14 - JHT staff induction training	900012 - Kruger Kate
		83	TF04 - Completed	Part completed		*14 - JHT staff induction training	900012 - Kruger Kate
		84	TF04 - Completed	Part completed		JHTvWF - JHT staff induction training - vWF	900012 - Kruger Kate
		85	TF04 - Completed	Part completed		*14 - JHT staff induction training	900012 - Kruger Kate
		97	TF04 - Completed	Fully completed		IT FULL - Internal training template - Full	900030 - Whitehouse William
		98	TF04 - Completed	Fully completed		IT FULL - Internal training template - Full	900030 - Whitehouse William

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
<b>Health and Safety</b>			
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	
<b>Machinery</b>			
Machine care and maintenance	Yes	10/04/14	VAC/SL
Checking for damage	Yes	10/04/14	
<b>Environment</b>			
Water conservation	Yes	09/04/14	REF/121235/JMB
Electricity conservation			
Recycling	Yes	09/04/14	

**Completed by**

Templa

**Completed date**

10/04/2014

**Notes**

Notes

**Signed by (trainer)**

Signed by (employee)

**Signed date/time**

10/04/2014 14:00

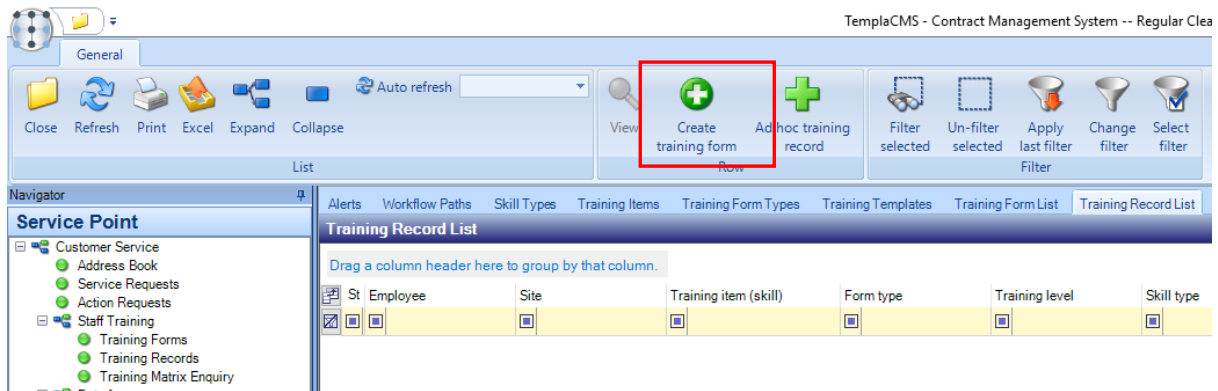
**Notes**

Notes

## 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:

The screenshot shows the 'Ad Hoc Training Record Detail' form. The form is titled 'Ad Hoc Training Record Detail - (new)'. It has a 'General' tab and a 'Training form' section. The 'Training form' section contains the following fields:

- Training form number: Ad hoc
- Title: Ad hoc
- Training template: Ad HocTraining.
- Employee: Adam Noronha
- Site: test
- Skill type: Health and Safety Training
- Training item: Ladder Training
- Training instructions: Safe Use, Storage and Maintenance of Ladders
- Attained date: 01/05/2018
- Expiry date: (not set)
- Reference: (empty text area)
- Comments: (empty text area)

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**.



St	Employee	Site	Training item (skill)	Form type	Training level	Skill type
	123456797654 - Adam	Test	Site walk round	SITEIND - Site Inductio	Site	Site Indu
	123456797654 - Adam	Test	Job details	SITEIND - Site Inductio	Site	Site Indu
	123456797654 - Adam	test986678 - test	Ladder Training	Ad Hoc - Ad Hoc Traini	Site	Health ar
	123456797654 - Adam	Test	Task card	SITEIND - Site Inductio	Site	Site Indu
	123456797654 - Adam	Test	Site specific information	SITEIND - Site Inductio	Site	Site Indu
	123456797654 - Adam	Test	Site emergency/evacuation	SITEIND - Site Inductio	Site	Site Indu
	123456797654 - Adam	Test	Site First Aid Procedures	SITEIND - Site Inductio	Site	Site Indu
	123456797654 - Adam	Test	Site Induction	SITEIND - Site Inductio	Site	Site Indu

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:

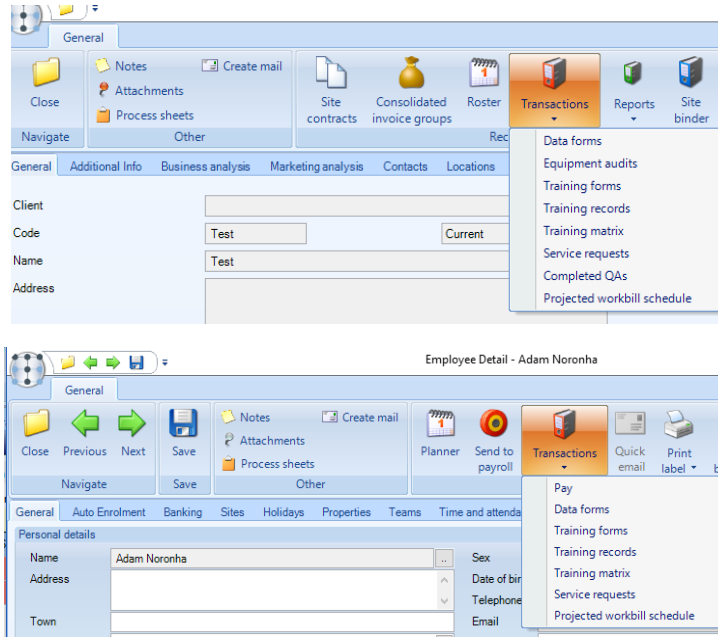
**Attained Date Range** – this will allow the filtering of training records based on when the training took place, the list will normally be used to return current (not expired) **training records**.

**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.

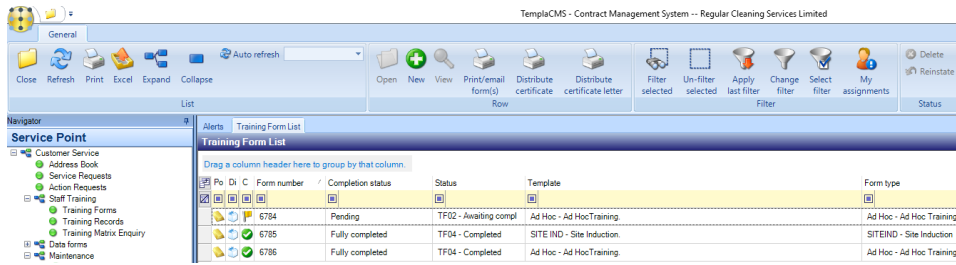
**Include superseded?** – this allows the user to view the training records at a given point in time when used in conjunction with the “Include expired records 'as at' date” option.

# 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:

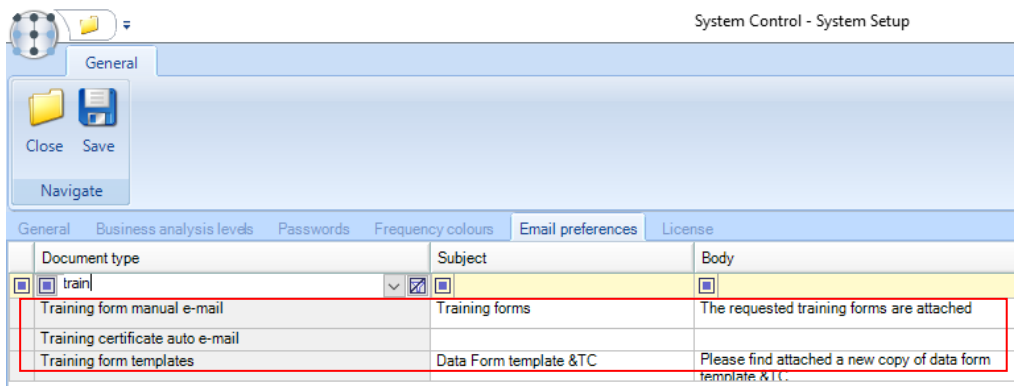


# Automated Emailing of Training Certificates

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

## EMAIL PREFERENCES

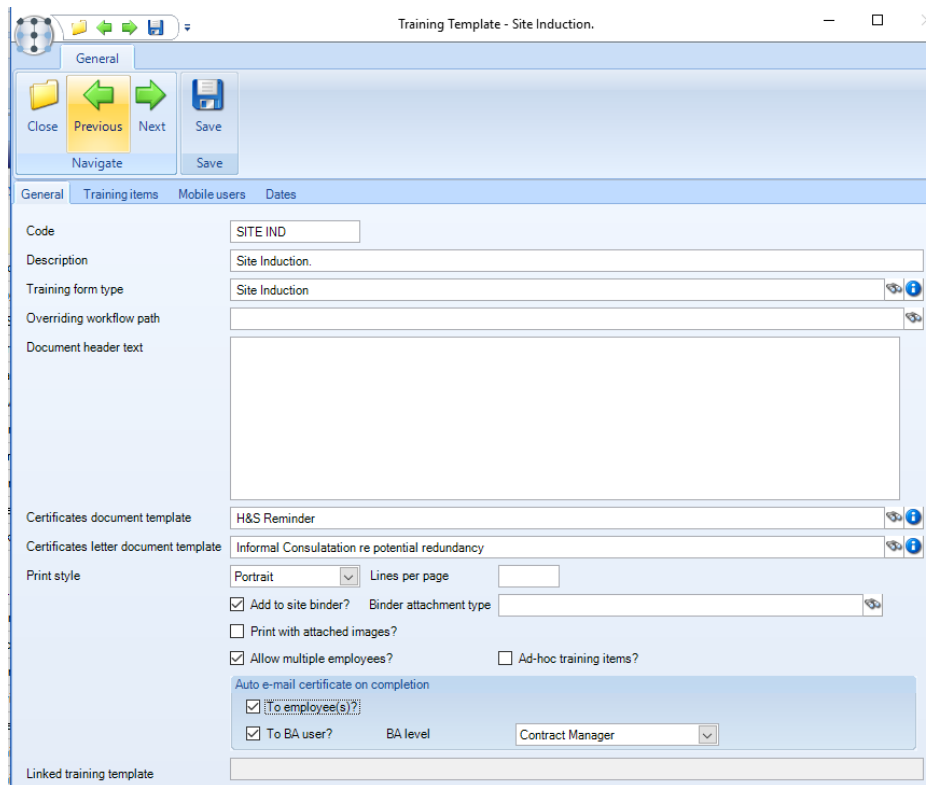
**Email preferences for Training certificate auto e-mail** can be setup from the Email preferences tab available on the **System Control** menu which allows for the configuration of email subject, body and sender



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).



The screenshot displays the 'Training Template - Site Induction' configuration window. The window has a title bar with standard window controls and a menu bar with 'General', 'Training items', 'Mobile users', and 'Dates'. Below the menu bar is a toolbar with 'Close', 'Previous', 'Next', and 'Save' buttons. The main area is divided into several sections:

- General:** Code (SITE IND), Description (Site Induction), Training form type (Site Induction), Overriding workflow path, Document header text.
- Certificates:** Certificates document template (H&S Reminder), Certificates letter document template (Informal Consultation re potential redundancy).
- Print style:** Portrait (dropdown), Lines per page (input), Add to site binder? (checked), Binder attachment type (dropdown), Print with attached images? (unchecked), Allow multiple employees? (checked), Ad-hoc training items? (unchecked).
- Auto e-mail certificate on completion:** To employee(s)? (checked), To BA user? (checked), BA level (Contract Manager dropdown).
- Linked training template:** (empty input field).

## 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.

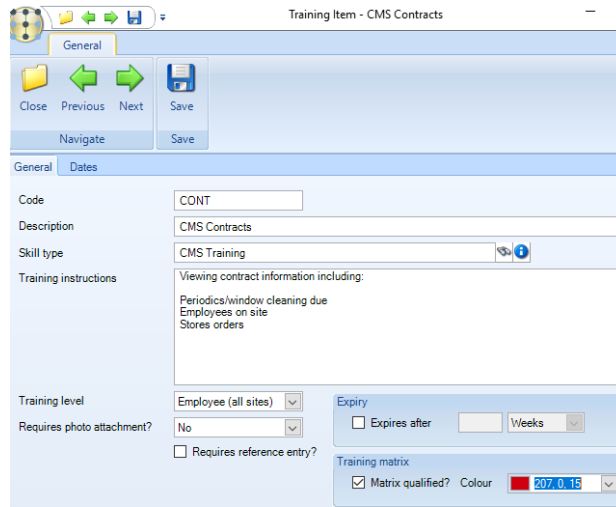
The level of training items used on the templates may be very specific, and the accumulation of these will ultimately result in the employee being qualified to work as a cleaner, a supervisor etc.

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?**:



Training Item - CMS Contracts

General

Code: CONT

Description: CMS Contracts

Skill type: CMS Training

Training instructions: Viewing contract information including:  
Periodics/window cleaning due  
Employees on site  
Stores orders

Training level: Employee (all sites)

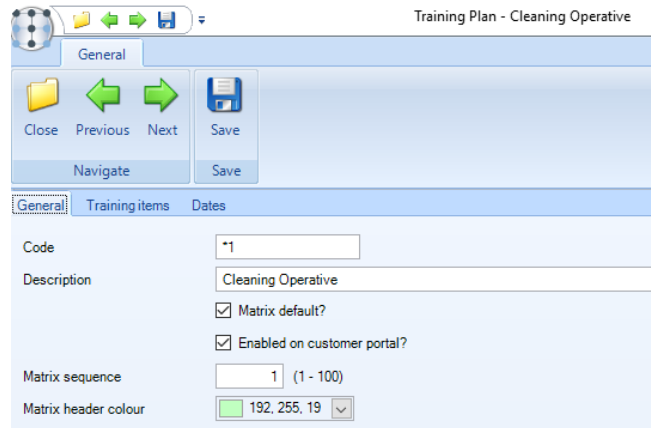
Requires photo attachment?: No

Requires reference entry?:

Expiry:  Expires after [ ] Weeks

Training matrix:  Matrix qualified? Colour: 207, 0, 18

Each training plan identifies the following details:



Training Plan - Cleaning Operative

General

Code: \*1

Description: Cleaning Operative

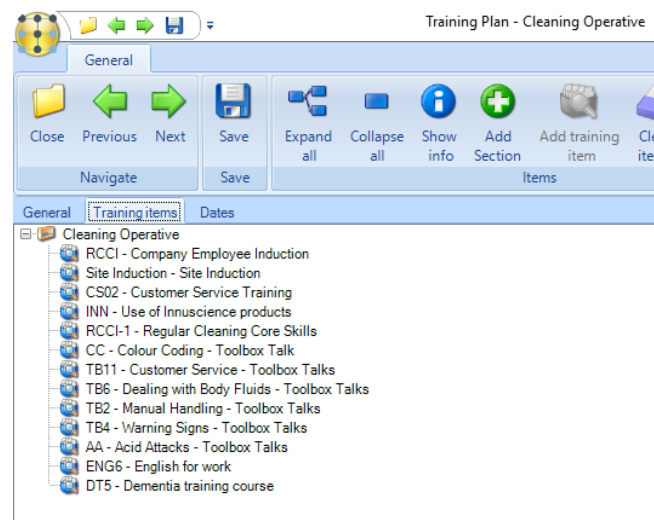
Matrix default?:

Enabled on customer portal?:

Matrix sequence: 1 (1 - 100)

Matrix header colour: 192, 255, 19

Along with a sequenced list of the items that make up the plan:



Training Plan - Cleaning Operative

General

Training items

Dates

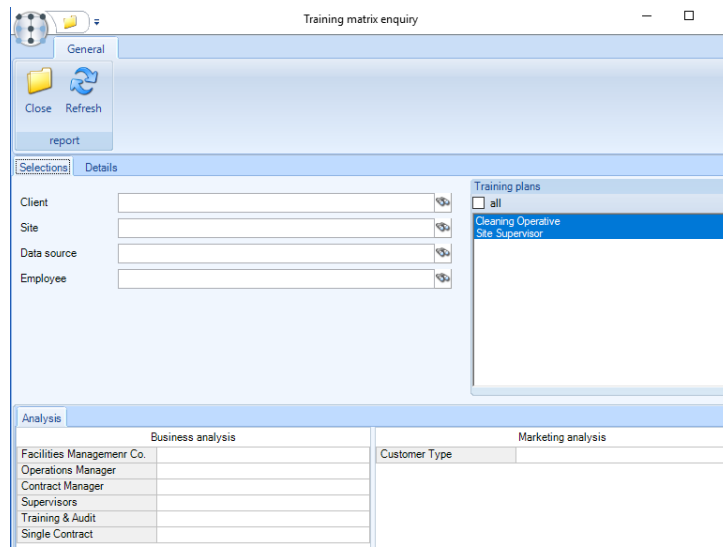
Cleaning Operative

- RCCI - Company Employee Induction
- Site Induction - Site Induction
- CS02 - Customer Service Training
- INN - Use of Innoscience products
- RCCI-1 - Regular Cleaning Core Skills
- CC - Colour Coding - Toolbox Talk
- TB11 - Customer Service - Toolbox Talks
- TB6 - Dealing with Body Fluids - Toolbox Talks
- TB2 - Manual Handling - Toolbox Talks
- TB4 - Warning Signs - Toolbox Talks
- AA - Acid Attacks - Toolbox Talks
- ENG6 - English for work
- DT5 - Dementia training course

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:

Training matrix -- Client - Site - Employee -					
Employee	cleaner				supervisor
	Bin cleaning	Floor cleaning	Glass cleaning	Surface cleaning	Staff management
005193 - Adrian Carter	01/05/2017	01/05/2017	01/05/2017	01/05/2017	
007274 - Alistair Stiles	01/05/2017	01/05/2017	01/05/2017	01/05/2017	
008737 - Andy Mistry	01/05/2017	01/05/2017	01/05/2017	01/05/2017	
900006 - Joan English	01/05/2017	01/05/2017	01/05/2017	01/05/2017	19/05/2017

## 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 matrix					
Training plan key: <b>Supervisor Cleaner</b>					
	Bin cleaning	extended training	Glass cleaning	Floor cleaning	Phone cleaning
000200 David Cox		01/01/2001			
000242 Ms Karen Upton		23/04/2012			
000328 Lindsay Nichols		28/09/2014			
002066 Adrian Johnson				16/05/2017	
006518 Alex Giles	16/05/2017	01/01/2016			16/05/2017
010698 Graham Emerson		01/04/2012			
010748 Bob Millgate		01/01/2012			

# 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



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit [teamsoftware.com](https://teamsoftware.com).