

# Trainings System for Managing Staff Training

A new sub-system has been added to Orixia Apps to manage staff training. This document outlines how to use it. The purpose of the new system is to create a centralized location where Training Requirements can be stored, and enable linkage between these "Trainings" and individual staff members so it is possible to see that "Staff Member "A" Received Training "B" on Date "C".

The Trainings data-table includes a "StaffTypeIDList" which allows listing of the types of staff requiring each type of training. This means that the system can also answer questions such as "Has Staff member "A" had all the trainings they require?"

The system includes a further mechanism, where if a Training Record is updated and this change requires an update in the Staff Training, the system will automatically add a "Requires Retraining" note for those staff who have already been trained in this Training.

## The Training and StaffTraining Entities

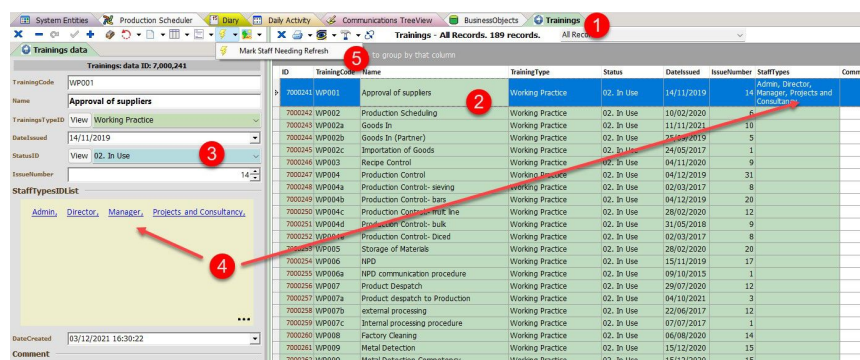


Trainings, Staff Trainings Entities

A Trainings Entity is added to the System Entities Screen, and functions like any other Orixia Entity. Note that it has a child Entity, StaffTrainings, which holds all the linking records for every training record of every staff member..

## Trainings Entity

Add data to the "Trainings" Entity to record Training Procedures that staff need to do in an Organisation.

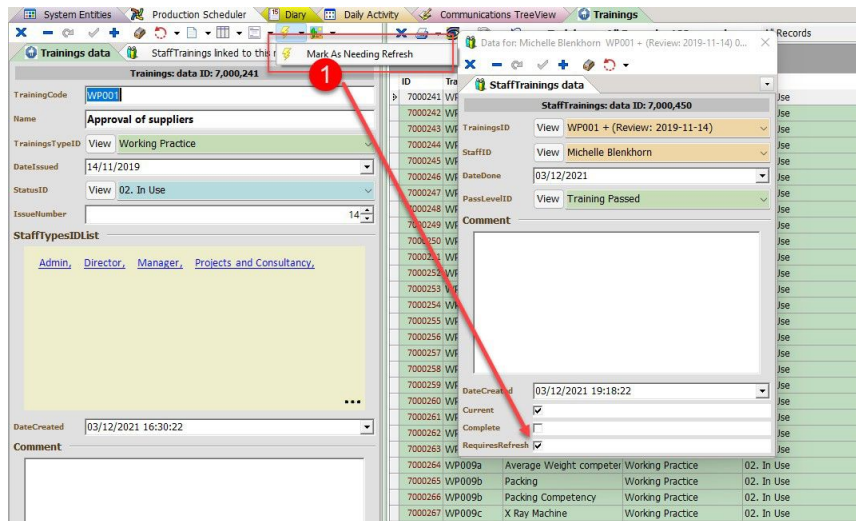


Features of the Trainings Grid and Edit Form

1. User is viewing "All Records" grid of the Trainings Entity.
2. All Training Procedures and Documents for the Organisation are listed.
3. Use the "Status" of each record to determine whether it is "In Use" or "No Longer Used" etc. You can add additional Status levels if needed, but the "In Use" Status should not be edited, as it is used to return lists for the Rapid Entry Grids.
4. Each Trainings record includes a "StaffTypesIDList" this lists the types of staff who need to undertake the training.
5. The Trainings Edit Form includes a "Mark Staff Needing Refresh" Action. When a Training Changes from time to time staff must be retrained. In such a case, click on this Action and all staff already trained in this procedure will be marked "RefreshRequired" for this training.

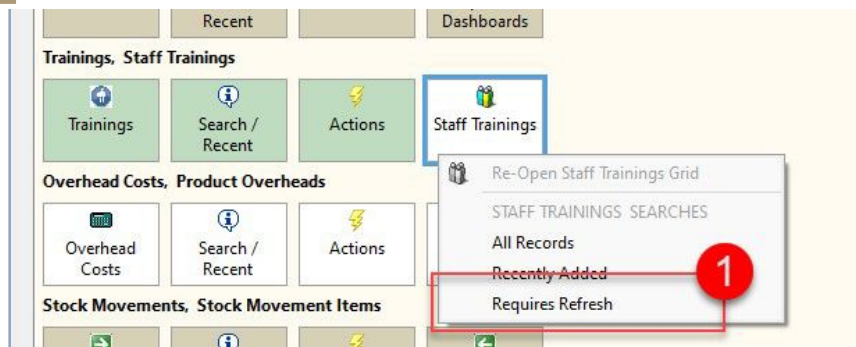
The records in the Trainings data-table act as holders for useful links. Add links to Files, Comments and Images which are useful to connect to a Trainings Record. This means that the Word Documents or PDFs which are used for training can be accessed easily by staff from the Training record.

Links from Trainings to Staff are then done through the StaffTrainings data-table. This allows any number of staff to be linked to any number of trainings. The system can then return reports showing all the Trainings done by particular staff members, and show staff members who have not received training they need, etc.



#### Requires Refresh

1. If the "Mark as needing Refresh" action is clicked, **all** staff with StaffTrainings Data for this Training will have their record updated, with "Requires Refresh" = true. This indicates that these staff are no longer fully trained.

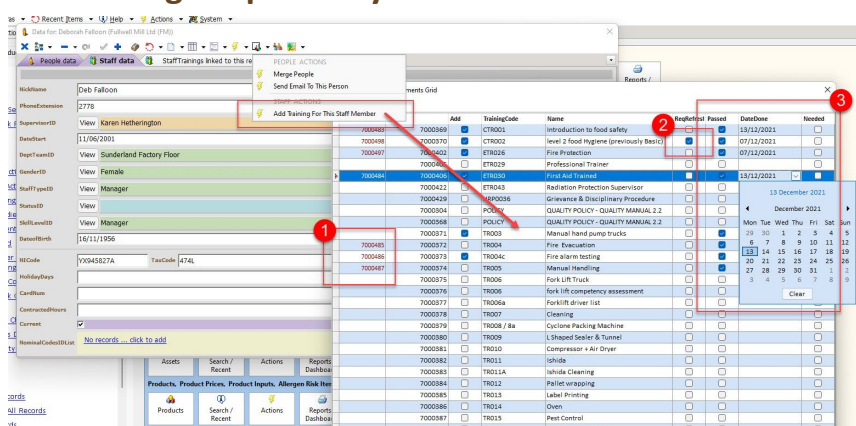


#### Staff Trainings Requires Refresh

1. Too see **all** StaffTrainings where staff require a refresher of their training, just click on the "Requires Refresh" choice in the StaffTrainings Grid-view list.

This process is a useful mechanism to keep Training processes up to date, and ensure that Staff are kept up to date with training they need.

## StaffTrainings Rapid Entry Grid



### The "Add Trainings" Rapid Entry Grid

From the individual staff-members data-record click on the "Add Trainings for this Staff member" action to open a Grid of all Trainings, with details for whether the selected staff member has already taken the training, or needs to take the training.

1. If the staff member has been trained in this procedure some of the data in the grid will show with details of that record.
2. If a Staff member "Requires Refresh" this column will be ticked.
3. If training has been undertaken, enter data in the "Passed" and "DateDone" columns, then click the "Post" button to update or create StaffTraining Records.

**Note that the "Needed" column in the Rapid entry grid will show ticked if this Training is required for the StaffType of the selected staff member.**

Data for: Deborah Falloon (Fullwell Mill Ltd (FM))

People data Staff data StaffTrainings

Drag a column header here to group by that column

ID	DateDone	Staff	Training	Details
7000486	01/11/2021	Deborah Falloon	CTR002	level 2 food Hygiene (previously Basic)
7000497	07/12/2021	Deborah Falloon	TR003	Manual hand pump trucks
7000498	07/12/2021	Deborah Falloon	CTR001	Introduction to food safety
7000500	10/12/2021	Deborah Falloon	ETR030	First Aid Trained
7000483	13/12/2021	Deborah Falloon	TR004	Fire Evacuation
7000484	13/12/2021	Deborah Falloon	TR005	Manual Handling
7000485	13/12/2021	Deborah Falloon	WP001	Approval of suppliers
7000487	13/12/2021	Deborah Falloon	WP002	Production Scheduling
7000488	13/12/2021	Deborah Falloon		
7000489	13/12/2021	Deborah Falloon		

PEOPLE CHILDREN  
CIS linked to this record  
STAFF CHILDREN  
Events linked to this record  
StaffTrainings linked to this record  
Timeaway linked to this record

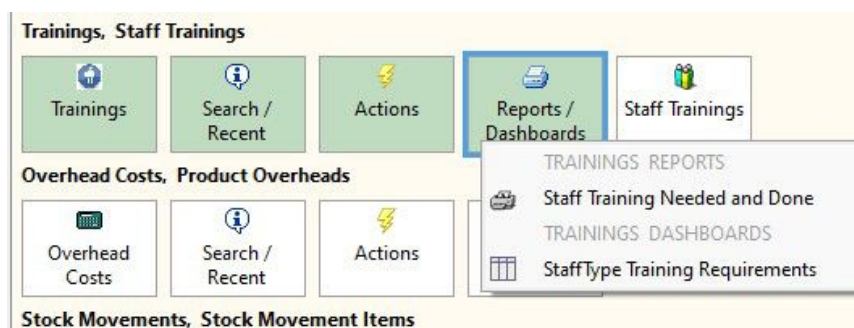
### Newly entered StaffTrainings Records

Once StaffTrainings have been added with the Add Trainings Rapid Entry Grid, they will then be present and linked to the staff member in question.

## Summary of Staff Trainings Concepts

1. You can add and edit Trainings, these are place-holders for training that can be done by staff. You connect Trainings records to sets of StaffTypes (ie Warehouse Staff, Production Staff, etc.) so that when you check a staff member's training needs the Trainings are marked as "Needed".
2. Use the "Add Trainings Rapid Entry Grid" to see trainings "Passed" "Needed" and RequiringRefresh" for a particular staff member. Use this same Grid to add "DateDone" data, and tick Training as "Passed" when staff have done a particular training.

## Reporting Dashboards for Training and Staff Training

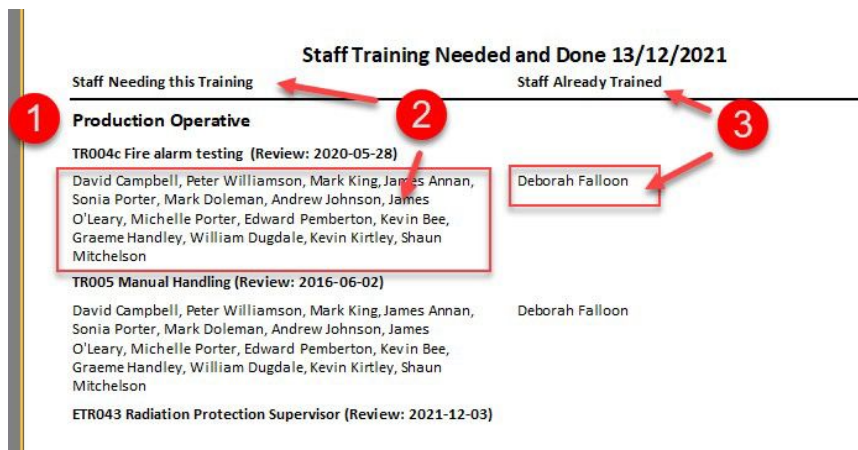


### Training and Staff Training Dashboards

When you need to review Training, you can reference the "Reports / Dashboards" which have been created. "Training Needed and Done" and "StaffType Training Requirements" as shown in the image, above.

The "StaffType Training Requirements" dashboard just shows a grid, with each StaffType as a heading and all the Trainings required for that StaffType listed below. This is a useful summary reference.

The "Staff Training Needed and Done" Report is shown below



#### Staff training needed and done

1. All Staff Types are listed in Order, with every Training they are linked to laid out below.
2. Shows which staff **need** this training.
3. Shows which staff have already received this training.

**Staff in List 2., who are not in List 3., require training in this Training Procedure.**

This report is useful for giving a summary of training that needs to be done.