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| tRIIO  Custom Trigger Specification  Training Gap Analysis |

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Sign Off

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# Introduction

As part of the STC (Safety Technical Competency) review, each manager needs to undertake an annual review of the competency of each individual associated with pre-determined group of requirements for each Job Record.tRIIO require a process built within Openhr to undertake this review automatically and analyse the training gaps for employee’s based on their Job Record.

The Job Record will hold a history of Competencies that are the same as the course title, the course Title Table will be used to hold the name and not the competency lookup. On average there could be between 30 to 50 per Job Record. This could grow as tRIIO may expand the process to include areas of their Client’s competency regime associated with Safe Control of Operations, therefore a history table is required to hold this information and not flat file copied down to the parent record.

tRIIO currently use the Training Booking Table to hold details of the Training Courses(linked to competency) that the employee has achieved.

The custom trigger process will need to cater for a comparison between the Training Booking table current training courses achieved (using certificate expiry date) and the Job Record History of competencies for the employees specific Job role and then output the records that do not exist in the Training Booking History to the Training Needs Table.

The Training Needs Table will become the repository for the Gaps in competence for the Job record and central training team will then book the employees onto the training courses required to meet the gaps identified using the Training Module functionality – book from waiting list.

A manager can then use self-service to look at Training Needs for Gaps and Training Booking to perform the STC review each year prior to signing this process off.

There are two occasions where the custom triggers to compare the tables and complete the gap analysis would fire,

1. Induction, New Starter is issued with 28 day cover note for STC compliance
2. Change of Job role (Job Record)

tRIIO have requested the process is controlled in line with their current process and the trigger cannot fire on entry of a new job only.

1. Following the employee joining the organisation, there will be an import run to populate the Employees Training Booking with the Training Courses (Competencies) they have already achieved prior to joining tRIIO.

These will be assigned an expiry date to assist in the review cycle. Once the import has completed the custom trigger needs to fire to then compare the tables and complete the gap analysis.

1. Following a job change, there will need to be a process to trigger the gap analysis in this case also. Addition of a flag or calculation will be required here; HR would not import the Training Booking data in this case. The employee would already hold a training history from the previous information added to their record during employment.

The manager can run custom reports on self-service to

1. Show the Training achieved (from training Booking)
2. Show the Gaps (from the Training Needs)

# Course Title Table

## Columns

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Size** | **Column Type** | **Notes** |
| Course Title | Character | 90 | Text Box | Mandatory, Unique |
| Code Prefix | Character | 6 | Text Box |  |

# Job Records

## Columns

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Size** | **Column Type** | **Notes** |
| Job Title | Character | 80 | Lookup | Lookup from Job Title Table. Mandatory Unique |
| Grade | Character | 5 | Calculated | Derived from Job Title Table |
| Unique Key | Numeric | 6 | Text Box |  |

# Job Competencies

## Columns

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Size** | **Column Type** | **Notes** |
| Competency | Character | 90 | Lookup | Lookup from course Title Lookup Table |
| Competency Category | Character | 20 | Calculated |  |
| Job Title | Character | 80 | Calculated | Derived from Job Records Job Title |
| Level Required | Integer | 1 | Spinner | Hide from screen |
| Unique Code | Character | 170 | Calculated | Competency concatenated with Job title |

The fields marked above in Blue font are changing and the fields marked in red font are being removed from the screen.

# Training Booking

## Columns

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Size** | **Column Type** | **Notes** |
| Booking Status | Character | 2 | Dropdown List |  |
| Cancellation charge sent | Date |  | Text Box |  |
| Cancellation date | Date |  | Text Box |  |
| Cancellation fee | Numeric | 7 | Text Box |  |
| Cancellation Reason | Character | 20 | Lookup |  |
| Certificate Expiry Date | Date |  | Text Box |  |
| Certificate Number | Character | 25 | Text Box |  |
| **Course Cost** | Numeric | 7 | Text Box |  |
| Course Link |  |  |  |  |
| Course Title | Character | 90 | Calculated | If Empty get Course Title from Course Records. tRIIO to import this information into the Training Booking Table.  Mandatory |
| Date Booked | Date |  | Text Box |  |
| Delegate Link |  |  |  |  |
| Did Not Attend | Logic |  | Check Box |  |
| End Date | Date |  | Text Box |  |
| Forenames | Character | 25 | Calculated |  |
| Invoice Sent | Date |  | Text Box |  |
| Joining Instructions Sent | Date |  | Text Box |  |
| Notes | Character |  | Text Box |  |
| Other Expenses | Numeric | 7 | Text Box |  |
| Payment received | Date |  | Text Box |  |
| Provisional Booking sent | Date |  | Text Box |  |
| Reason | Character | 40 | Lookup |  |
| Result | Character | 4 | Dropdown List |  |
| Special Requirements | Character | 40 | Calculated | Derived from Personnel records |
| Staff Number Course Title | Character | 25 | Calculated | Staff Number Concatenated with Course Title |
| Start Date | Date |  | Text Box |  |
| Status Description | Character | 20 | Calculated |  |
| Surname | Character | 25 | Calculated | Derived from Personnel Records |
| Travel Costs | Numeric | 7 | Text Box |  |

The fields marked above in Blue font are changing and the fields marked in red font are being removed from the screen.

# Training Needs

## Columns

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Size** | **Column Type** | **Notes** |
| Approved By | Character | 40 | Lookup |  |
| Course Title | Character | 90 | Lookup | Mandatory |
| Date Identified | Date |  | Text Box |  |
| Delivery Method | Character | 35 | Dropdown List |  |
| Desirable Essential | Character | 9 | Option Group |  |
| Development Need | Character | 50 | Text Box |  |
| Entered By | Character | 35 | Lookup | Entered By Table |
| Notes | Character |  | Text Box |  |
| Reason | Character | 40 | Lookup | Training Need Reason Table |
| Required By | Date |  | Text Box |  |
| Staff Number Course Title | Character | 25 | Calculated |  |

# Trigger Process

## Induction New Starter

The process would be as follows:-

**Step 1:-**

tRIIO add new employee to Personnel Records and assign them a Job Title via the Salary History

**Step 2:-**

An import is run to populate the Training Booking History Table with the following information,

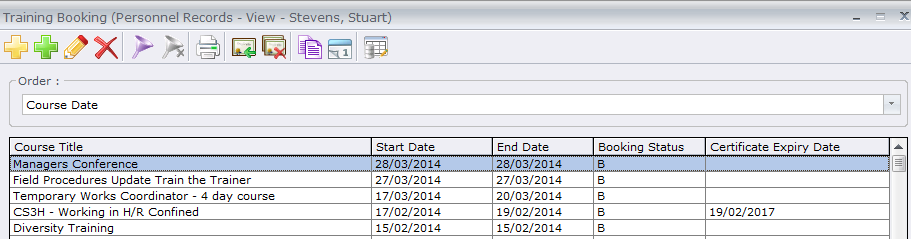
Course Title (Competency)

Training Booking Start Date

Training Booking End Date

Certificate Expiry Date

The new employee’s Competence data is held from the information provided at Induction.



**Step 3 :-**

Once the import has been run an import of global update is run to check a box to trigger the induction based gap analysis. This Gap analysis is only done after the import has been run.

**Step 4:-**

The competencies (Training Courses) held against the Job records table linked to the Job the employee has been assigned to be compared to the information imported into the Training booking Table. Any records that do not exist will be inserted into the Training Needs table.

These records will then be added to courses by the training team using the Add from waiting list functionality.

## Job Title change

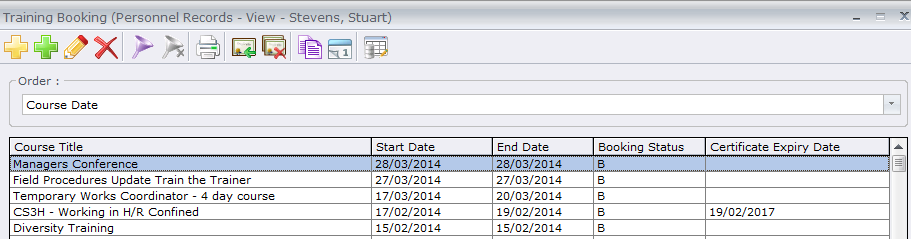
The process would be as follows:-

**Step 1:**

The HR Team will amend the Job Title for the employee adding a new record with an effective date to the salary history.

**Step 2:**

Once the Job has changed, the trigger will look at the Job Records Table and if there are any competencies held against the job title, compare them to the Training Booking Table and current records where the training had been completed, using the certificate expiry date for this.



**Step 3:**

If the Job Title has competencies attached within Job Records and there are gaps, insert the gap records of training courses into the Training Needs Table.