

EW Assist

Training – An Administrators guide

EW Assist Training can be used to manage:

- **List your company's training courses**
- **Request training**
- **Progress training requests**
- **Review training records**
- **Expiry Alerts**
- **Training course refresher/follow on courses**
- **Company training requirements**

STAs are the term for all training courses in EW Assist which stands for Skills training and Accreditations. TCAs are the courses that have been or will be sat by an employee.

IMPORTANT: Only a person with a Functionality Role of 'Skills/Training/Accreditation Admin' can manage the Skills in EW Assist.

List your company's training courses

A list of all your STAs are available to view by everyone at Actions > Skills (dropdown) > Skills > Available STA's > All. New courses can be added at Actions > Skills (dropdown) > Skills > Available STA's (dropdown) > Add > STA and edited in ... Available STA's (dropdown) > Maintain > STA.

Some STAs are already added. They consist of popular courses available from Ellis Whittam and Examples. These can be controlled in ... Available STA's (dropdown) > Maintain > STA pack Sets.

New STAs can be one of the following:

- **TBA** – We recommend you have at least one of these. It provides a place for your staff to request training that has yet to be added to your STA list. If you agree with the request, it can then be added and the request moved to it.
- **CPD** – At least one CPD STA should be created for each professional discipline and the details of the training event could be recorded when the TCA is created. However, you could also create individual CPD STAs for each recordable event.
The remaining types of STAs should be created for each course title
- **Accreditation** – This STA includes information such as Awarding Authority, validity or fresher period and score.
- **Training** – As above and can also contain modules, clients can sit training courses (to record internally run courses for your own products or services) and the next scheduled event
- **Skill** – Used to hold an ability that has been self learnt or casually passed from one employee to another
- **Knowledge** – As above but for information or experience
NOTE: the majority of your STAs will be Skills and Knowledge
- **CRB** – All STAs can be marked at a key monitored work document which means the holders of these STAs must have this STA to do carry out their work. This is particularly useful with Criminal Record Checks and permits
- **Permit** – The validity period of an STA makes the duration of a permit fixed in length. Once the valid to date is reached the TCA will expire. In contrast, if the refresher requirements

are used instead, the TCA will flag that the nominal, recommended length has been reached but the qualification is not deemed to have been lost.

Request training

An Employee, Manager or STA admin can raise a training request for an employee. Initially when a TCA is first created it starts as a New Request. An Employee or Manager should complete the information and change the status. Different STA types will have different status choices. An STA admin will be able to see all statuses whereas everyone else will only be able to choose a status that simply raises the TCA to an STA Admin to action it. At this stage the TCA is Pending.

Progress training requests

The STA Admin can see all New Requests and Pending Requests in Actions > Skills (dropdown) > Skills > Users STA's (dropdown) > New Requests | Pending/In Progress. The STA Record (e.g. TCA001234) will open the training request. The STA Ref (e.g. STA001234) opens the training course information which also includes the available statuses for this STA type, a list of employees with this as a current STA and those with a pending request.

When in the training request, the status can be changed to reflect the training situation e.g. waiting on course, scheduled, taking, achieved, cancelled etc. There are a number of different statuses but they all broadly fall within New, pending, Pass, Fail or cancelled – just choose the status that has the most appropriate fit.

Review training records

Your employees can review their own skills in My details > Skills (dropdown) > Current. A manager can review the skills of their team in My details > group > employee name > Skills (dropdown) > Current. An STA Admin can review the training records in Actions > Skills (dropdown) > Skills > Users STA's > Current. A Client Admin can review skills in People > employee name > Skills (dropdown) > Current.

Expiry Alerts

An STA that has a validity period with a fixed duration will eventually expire and by default, will alert the STA Admin 8 weeks prior to the expiry date. For the last 8 weeks of its life it will be visible in the Expiring pages for Work Documents and Non Work Documents alike. An email will also be generated on a weekly basis with a list of expiring training. Once the expiry date has been reached they will be listed on the corresponding Expired list and will be highlighted more urgently on the weekly email, especially if it is a Work Document.

Expiring and Expired training is also highlighted in the ...Users STA's > All Records. Expiring training is show in orange while expired is red.

Training course refresher/follow on courses

When adding a new STA there are three options to manage its lifespan. Firstly it could be unmanaged and therefore lives forever. Secondly the Refresher Requirements information could be used to flag a TCA that could be refreshed (1). This is a casual highlight to indicate that the next course could be due. Finally when the course lives for a very specific period of time the Validity Period should be used (2). This will ensure that the expiring TCA is properly flagged, particularly if it is set as a work document too.

The Refresher Requirements also includes information about whether this course can be automatically refreshed (3) and whether the same course is the refresher (4) or in fact another course is due next instead (5).

The Validity Period can also be used with 3,4 &5.

VALIDITY PERIOD	
2	Months Valid For <input type="text"/> mth The nominal length of validity. ONLY USE IF THIS STA HAS AN ACTUAL VALIDITY DURATION
	Expiring Warning Period <input type="text"/> wk N.B. Only set if you need to over-ride the default 8 weeks warning period of an expiring STA Valid To date.
REFRESHER REQUIREMENTS	
	Refresher Required <input type="checkbox"/> Controls follow on request creation plus helps keep track of STA's that have no set validity period but may need refreshing.
	This is a Refresher <input type="checkbox"/> (for this or a previous STA - Controls the inclusion into the picklist below)
	Or use this Refresher STA <input type="text"/> Select Value
1	Refresh After N Months <input type="text"/> mth If no "VALID TO" is involved - use this to calculate an indicative date when it may need refreshing.
	Days Before Expiry <input type="text"/> d that the STA needs to be retaken by, based on the STA VALID TO expiry date, to ensure qualification continuation.

If 3 and 4 are selected above, the follow on course can be raised on the current TCA by clicking the 'Create next request for this' link. This will create the training request for the next course in line. It will also show the previous and next TCA references on all the courses in the line.

User	/ CAR Team
STA Ref	STA010147 Training / TBA / TBA
Title	Recent and upcoming changes in Employment Law - In house lawyer training.
STA Record	TCA001121 - Refreshed / OLD
Internal Code	N/A / External Code N/A
Creation Request	NONE Follow-on/Refresh Request Ref: TCA001124 CREATE NEXT REQUEST FOR THIS

Company training requirements

There are 3 ways to control who should be sitting a particular STA. They are:

- Staff mandatory - Every employee should sit this course, e.g. an induction
- Staff target - A number or percentage of staff that should sit this course

Note: These are set when adding or maintain an STA

- By Job title

Note: This is set by an STA Admin in Actions > Skills > Available STA's > maintain > STA / Job matrix

Staff Mandatory and target information is available to all employees in Actions > Skills > Available STA's > All

STA Admins can see mandatory/Targeted and Job Related information under Available STA's and highlights of missing Company and Job Mandatory's are available under User STA's. These areas allow you to quickly ADD a training request that is currently missing or to review pending requests that have been highlighted as mandatory.

These areas also show the expected number of staff with this STA, how many are pending and the current skills gap.

Skills / Training / Accreditations - Mandatory/Targeted (1)																		
Staff Mand	Staff Target	Staff Curr With	New & Pend Reqs	Skills Gap	Cur Pct Achvd	STA Ref	Type	Category	Source	Title	Int Code	Ext Code	Awarding Body	Next Run	Num Of Ms	For Ext Client Attds	Added	Updated
Yes	127	15	2	112	12%	STA010090	Training	TBA	TBA	Induction Course			N/A		9	No	22/11/12	10/12/12