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Trainee Scenario

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Trainee Scenario

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Estimated time to read: 10 minutes

The Trainee Scenario is common across industries in which some employees are considered trainees (apprentices) and thus can only work under the supervision of a more experienced (trainer) employee.

This tutorial will show you how to use the Trainee Scenario.

Overview

This document will guide you through the setup of a scenario where you can configure an **Employee** as a Trainee for a **Certification**. The **Certification** in question will later allow the **Employee** to work on any given **Resource** that requires the **Employee** to hold the **Certification**. This scenario will allow another **Employee** to act as the Trainer and supervise any operations performed on the **Resource** while the Trainee does not yet hold the **Certification**.

Note

After successfully obtaining the **Certification**, the employee no longer requires supervision.

Scenario Setup

To enable trainees for a specific **Certification**, follow the steps described on the table below:

Step Number	Step	Description
1	Create the Employees	You need at least one Trainer and one Trainee.
2	Create the Certification	Set a specific property in the Certification to allow trainees.

Step Number	Step	Description
3	Assign Certification to Employees	Set adequate Certification configurations for each Employee .
4	Configure the Resource	Set adequate personnel requirements for a Resource .

Table: Steps to setup the trainee-related Entities

Sequence of Steps

After the setup of these entities is performed, you can proceed with assigning **Certification** to **Employees**, as Trainer or Trainee, and at the selected **Resource**. The steps below will help you to create the adequate scenario:

Step 1: Create the Employees

The following diagram shows you the relationships between **User** and **Employee**. You need a Critical Manufacturing MES **User** associated to your system user account and you must have an **Employee** associated to that **User** to perform operations on **Resources**.



Begin by creating the **Users** and **Employees** for the scenario where you have one Trainer and one Trainee. Considering a situation where there are no system objects created and you are starting from a clean system. First of all, create the **User** for the Trainer by going to the **Security** entity in the **Administration** menu, accessing the Users section, and creating a new **User**, which in this case is the Services User you see below:

+ Create New User

General Data

Account

Name

Email Address

Primary Role

Integration User

☐

Enabled

☒

Auto-Lock Timeout

 seconds

PIN

Token

Authentication Strategy

Password

Request Password Change

☐

Comments:

Cancel

Create

Info

If users already exist, you can also use an existing system user as a Trainer, provided that **User** has an appropriately associated **Employee**.

Now create an **Employee** to associate to the **User** you just created. Go to the **Employee** entity in the **Business Data** menu and create a new **Employee**:

Edit Employee

USER
GENERAL DATA

General Data

Name

Description

Type

General

Data Group

Information

Number

Area

Area

Calendar

Standard

Costing

Cost Per Hour (\$)

Cost Center

Clock-In and Clock-Out

Clock-In

Clock-Out

Comments:

Cancel

Save

After the Trainer is created, create the **User** for the **Employee** that will be the Trainee:

+ Create New User

General Data

* Account:

* Name:

Email Address:

Primary Role:

Integration User: ☐

Enabled: ☒

Auto-Lock Timeout: seconds

PIN:

Token:

Authentication Strategy:

Password:

Request Password Change: ☐

Comments:

* Create Employee

USER
GENERAL DATA

General Data

Name:

Description:

* Type:

Data Group:

Information

* Number:

Area:

* Calendar:

Costing

* Cost Per Hour (\$):

Cost Center:

Clock-In and Clock-Out

Comments:

After all user-related objects are created, move to the **Certification**.

Step 2: Create the Certification

Navigate to the **Business Data** menu, select the **Certification** entity and create the new **Certification** that will be assigned to the **Employees**.

Create Certification

GENERAL DATA

General Data

Name

Chocolate Chip Cookie Baking

Description

Type

General

x

Data Group

Information

* Owner Role

Administrators

x

Information URL

Distribution List

Send Notification On Changes

☒

Send Notification When Certification is Required

☒

Permissions

Allow Manual Grants

☒

Comments

Cancel

Create

Several properties must be configured in the **Certification** to allow trainees:

Property	Description
Allow Manual Grants	Whether you can manually grant the Certification to Employees .
Enable Trainees	Whether trainees will be allowed for this Certification .
Trainee by Default	Whether new Employees that are assigned the Certification will be set as Trainee By Default.
Training Maximum Duration	Set the time period that will be used when assigning the Certification to an Employee .

Table: Relevant properties to allow trainees for a given Certification

Set the **Allow Manual Grants** and **Enable Trainees** flags as `true` and select a value of 2 days for the duration of the training period:

Create Certification

GENERAL DATA

Changes:

Send Notification When Certification is Required

Permissions

Allow Manual Grants

Allow Self-Granting

Allow Granting By Manager

Validity Period

Valid For

Allow Override

Training

Enable Trainees

Trainee By Default

Training Maximum Duration

Comments:

Cancel

Create

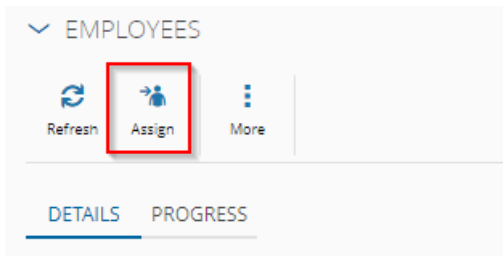
Info

For more information, see [Create Certification](#).

Select **Create** to move to the next step.

Step 3: Assign Certification to Employees

With all objects now created, assign the **Certification** to both **Employees**. Open the **Certification** you created, navigate to the **Employees** sub-section in the Details View panel and select **Assign** located on top of the grid:



Select both **Employees** from the list of available entries and select **Next** to continue.

Assign Employees To Certification

EMPLOYEES — CERTIFICATION

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TYPE: General Team: Manager: Search: Selected Employees (0)

Employees (7)

EMPLOYEE	NUMBER	TYPE	TEAM	MANAGER
☐ John Smith	12345	General		
☐ Services user	Services user	General		

Rows per Page: 25 Page 1 of 1 (7 records)

Comments:

Cancel Back Next

In this section you can configure the **Certification** assignment for both **Employees**. Ensure that the Trainer and Trainee are configured accordingly:

Trainer

Set the **Granted** flag to **true** and then set the **Employee** as a Trainer for this **Certification**. Since the process is manual, the current date will be set as the certification date.

Warning

Setting an **Employee** as Trainer for this **Certification** is an individual process, meaning that it does not automatically make the **Employee** a Trainer for any other **Certification**.

Assign Employees To Certification

EMPLOYEES — CERTIFICATION

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Employees Employee Certification Details

EMPLOYEES	CERTIFICATION DATE
Services user (Services user)	8/15/2022, 10:34:54 AM
John Smith (12345)	

Planned Date: MM/dd/yyyy HH:mm PP

Granted: ☒

Certification Date: 08/15/2022 10:34 AM

Trainer: ☒

Trainee: ☐

Valid To:

Remarks: This is the trainer

Comments:

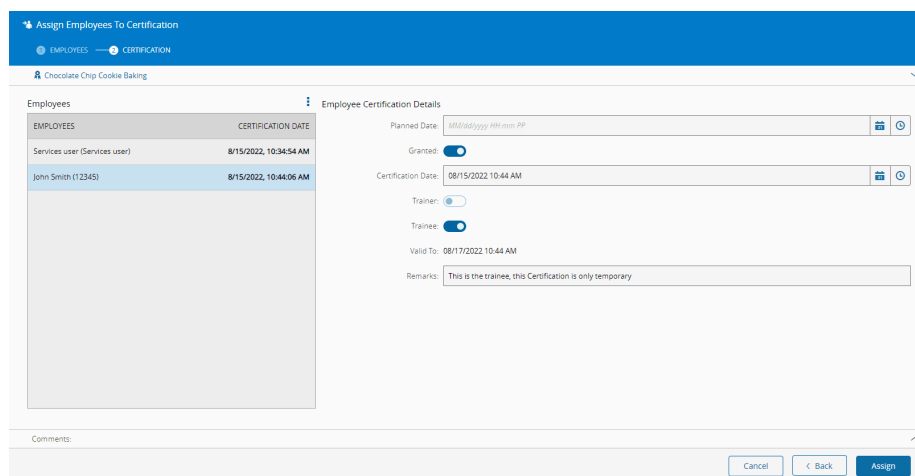
Cancel Back Assign

Trainee

Since we configured the **Certification** to allow manual grants, proceed to granting the **Certification** to the **Employee** and set the Trainee flag as `true`. Notice that the **Valid To** value has been automatically set with the date as `Certification Date + Training Maximum Duration`, indicating the proper validity of the **Certification** assigned to the **Employee** that is set as Trainee.

Warning

After this period expires, if the Trainee status of **Certification** is not changed (unsetting the **Trainee** flag), the **Employee** will not be allowed to check-in at a **Resource** that requires this **Certification** for operation.



After this step is completed, these are the contents of the **Employees** sub-section of the **Certification**:

EMPLOYEES												
Refresh Assign More												
DETAILS PROGRESS GRANT TYPE: All STATE: All Search												
Employee (2)												
EMPLOYEE	NUMBER	TEAM	PLANNED DATE	CERTIFICATION D...	TRAINER	TRAINEE	VALID TO	REMARKS	GRANT TYPE	CERTIFIED BY	EXCLUDE FROM SCI	STATE
☐ John Smith	12345		8/15/2022, 10...		☒	☒	8/17/2022, 10:44:06 AM	This is the tra...	Manual	CMPCmfsm	☒	Active
☐ Services user	Services user		8/15/2022, 10...		☒	☒		This is the tra...	Manual	CMPCmfsm	☒	Active

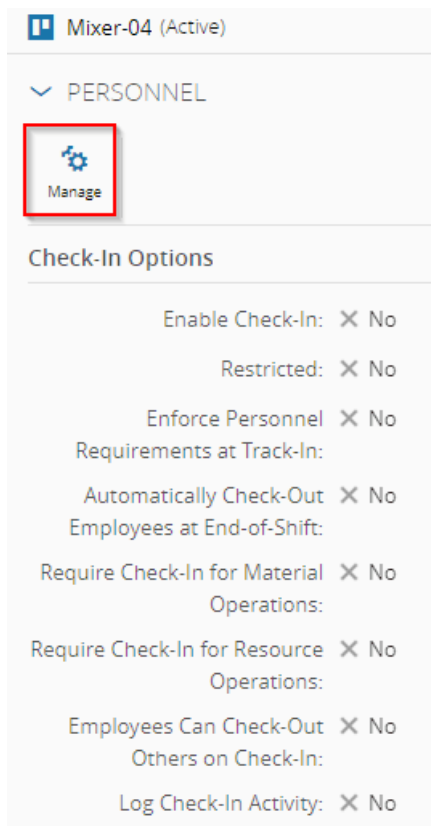
Info

For more information, see [Assign Employees to Certification](#).

Step 4: Configure the Resource

In the **Resource**, configure it to require the **Certification** you just configured for operations.

Navigating to the **Business Data** menu, select the **Resource** entity and open the **Resource** you want to configure. Select the **Personnel** sub-section from the **Details** navigation panel and select **Manage** located on top of the grid:



Several properties must be configured in the **Resource** to set personnel requirements including the need for a **Certification**:

Property	Description
Enable Check-In	Must be set to allow other options for personnel requirements on this Resource .
Restricted	Whether the Employee performing check-in must select the position

Property	Description
	in which the Employee is checking-in.

Table: Relevant properties to allow personnel requirements for a given Resource

Set the **Enable Check-In** and **Restricted** flags as `true` and continue to the next section.


Manage Personnel Information

1 CHECK-IN
2 PERSONNEL REQUIREMENTS


Mixer-04 (Up) / SEMI E10 > Standby

Options

Enable Check-In: ☒

Restricted: ☒

Enforce Personnel Requirements at Track-In: ☐

Automatically Check-Out Employees at End-of-Shift: ☐

Require Check-In for Material Operations: ☐

Require Check-In for Resource Operations: ☐

Employees Can Check-Out Others on Check-In: ☐

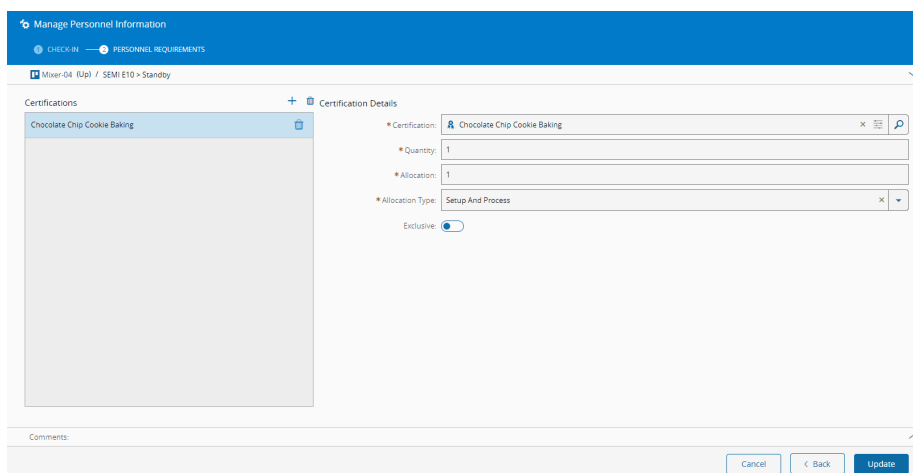
Log Check-In Activity: ☐

Add a new **Certification** by selecting **+** in the left section. Select the **Certification** you created and set the following values in the other fields:

- Quantity (set as `1`) - the number of required **Employees** that hold the **Certification**.
- Allocation (set as `1`) - configures the percentage of working time that is allocated to each **Employee**. A value of `1` indicates 100% allocation.
- Allocation Type - used for Scheduling purposes, not important for this tutorial, leave it with the default value.
- Exclusive (set as `false`) - indicates whether the **Certification** should be used exclusively by a single **Employee**. If you set this as `true`, the value for Allocation will be set as `1`.

Info

For more information, see Manage Personnel.



Select **Update** to close the wizard and move on to the next step.

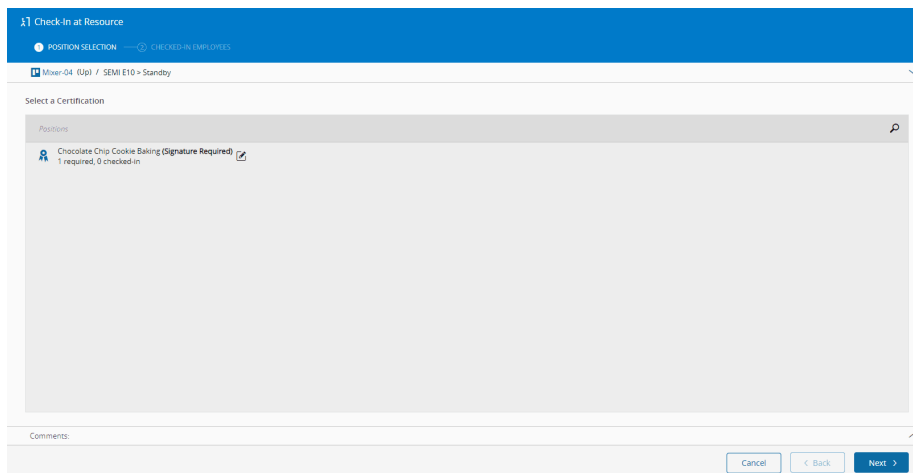
Scenario example

Consider that the Trainee is undergoing training for the **Certification** that was assigned above. To continue training, the Trainee is required to perform operations on a **Resource**.

From the point of view of the Trainee

The Trainee is logged into the system and navigates to the **Resource View** of the **Resource** configured above. Since the **Resource** is set as restricted to specific

Certification holders and requires check-in to be operated, the Trainee selects **Check-In** on the top ribbon:



Note

The **Certification** has the indication that it requires a signature of a Trainer for proper check-in, thus fulfilling the personnel requirements configured above.

Select the **Certification** and proceed to the next step, since there are no other **Employees** checked-in. When attempting to complete the check-in process, a window will be displayed requiring a signature from a defined Trainer for that **Certification** in that **Resource**:


Trainer Authentication

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Trainer Credentials



Sign

Cancel

After the signature (biometric, password or PIN) is entered, the Trainee can continue with the process.

From the point of view of the Trainer

After a Trainee is logged into the system (with proper authentication from the supervising Trainer), a Trainer can manage the Trainee using the **Manage** operation, accessible through the **Area View** or directly through a **Resource**.

Refresh
Change State
Check-In
Check-Out
Manage
Request
More

General
Resources
Actions

Cookie Manufacturing

Employees
Trainees

Trainers

RESOURCE STATE: ALL
RESOURCE TYPE: ALL

Mixing Process	Mixer-01 Standard	Mixer-02 Standard	Mixer-03 Standard	Mixer-04 Standard	Mixer-05 Standard
23	0 1 2 0	0 1 1 0	0 0 1 1	0 0 0 0	0 1 0 0

Info

Using the **Area View** provides the extra advantage to check-in or check-out multiple **Employees** at multiple **Resources** in the **Manage Resources Trainees** wizard.

Manage Resources Trainees

RESOURCES — TRAINERS

Select Resources / 1 items selected

RESOURCE STATE: ALL RESOURCE TYPE: ALL

RESOURCES	
☒	Mixer-04 Checked-in employees: 1 Trainees: 1

Comments:

Cancel < Back Next >

In this wizard, a Trainer can manage which of the trainees is logged into a specific **Resource** and perform check-in/check-out operations by selecting/deselecting the flag next to the Trainee.

Manage Resources Trainees

RESOURCES
TRAINees

Select Trainees / 1 items selected

RESOURCES	MY TRAINees
Moor-04 Checked-in employees: 1 Trainees: 1	☒ John Smith (12345)

Comments

Cancel

< Back

Update

For more information, see [Manage Trainees](#).

Trainee Check-ins at Maintenance Activity Orders

If there is an active Maintenance Activity Order that requires check-in (the property Restrict Check In is set to `true`), when an Employee is checking-in using a

Certification for which they are a Trainee (the property Is Trainee is set to `true`), the identification and electronic signature of a valid certified Trainer (with state as `Active` or `Grace Period` and Is Trainer set to `true`). Note that if the Trainer has the property Require Clock-In set to `true`, the Trainer must be Clocked-In.



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