



Trainee Scenario

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Trainee Scenario

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.
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

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**.

```
graph LR
    Main[Employee] === A1[User]
    A2[Resource] -.- N1[Resource Personnel Requirements] -.- A3[Certification] --- Main

    classDef mermaid_title color:#000, fill:#fafafa, stroke:#fafafa, stroke-width:0px, font-size:100%, font-weight:200;
    classDef mermaid_start color:#000, fill:#fafafa, stroke:#fafafa, color:#fafafa, stroke-width:0px, font-size:100%, visibility: hidden;
    classDef mermaid_businessdata color:#000, fill:#65CDE8, stroke:#65CDE8, stroke-width:0px, font-size:100%;
    classDef mermaid_nonbusinessdata color:#000, fill:#B7DEE8, stroke:#B7DEE8, stroke-width:0px, font-size:100%;
    classDef mermaid_entity color:#000, fill:#FB9F53, stroke:#FB9F53, stroke-width:0px, font-size:100%;
    classDef mermaid_entitylinked color:#000, fill:#FCD5B5, stroke:#FCD5B5, stroke-width:0px, font-size:100%;
    classDef mermaid_context color:#000, fill:#B9CDE5, stroke:#B9CDE5, stroke-width:0px, font-size:100%;
    classDef mermaid_optional color:#000, fill:#B7DEE8, stroke:#65CDE8, stroke-width:1px, font-size:100%, stroke-dasharray: 5 5;
    class Main mermaid_entity
    class A1,A2,A3,A4,A5,A6,A7,A8,A9,A10,A11,A12 mermaid_businessdata
    class N1,N2,N3,N4,N5,N6 mermaid_nonbusinessdata

    click Main ".../userguide/business-data/employee"
    click A1 ".../userguide/administration/security/users"
    click A2 ".../userguide/business-data/resource"
    click A3 ".../userguide/business-data/certification"
```

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

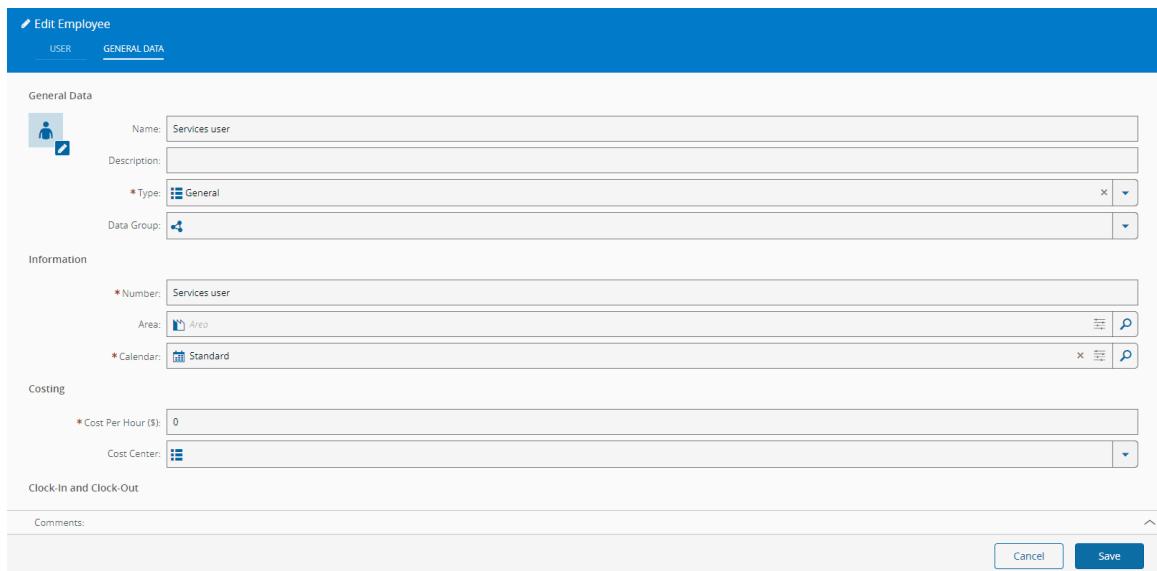
	* Account: <input type="text" value="SERVICESUSER"/>
	* Name: <input type="text" value="Services User"/>
	Email Address: <input type="text" value="servicesuser@domain.com"/>
	Primary Role: <input type="text" value=""/>
Integration User:	<input checked="" type="checkbox"/>
Enabled:	<input checked="" type="checkbox"/>
Auto-Lock Timeout:	<input type="text"/> seconds
PIN:	<input type="text"/>
Token:	<input type="text"/>
Authentication Strategy:	<input type="text"/>
Password:	<input type="text" value="*****"/>
Request Password Change:	<input checked="" type="checkbox"/>

Comments:

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: Services user

Description:

* Type: General

Data Group:

Information

* Number: Services user

Area: Area

* Calendar: Standard

Costing

* Cost Per Hour (\$): 0

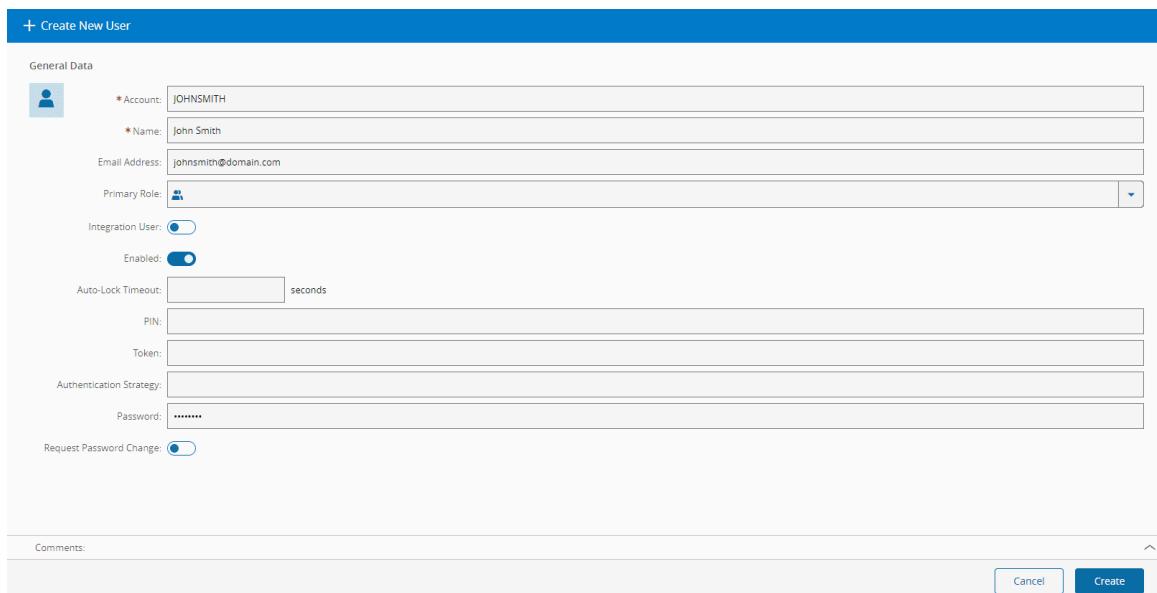
Cost Center:

Clock-In and 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: JOHNSMITH

* Name: John Smith

Email Address: johnsmith@domain.com

Primary Role:

Integration User:

Enabled:

Auto-Lock Timeout: seconds

Pin:

Token:

Authentication Strategy:

Password: *********

Request Password Change:

Comments:

Cancel **Create**

* Create Employee

USER — GENERAL DATA

General Data

Name: John Smith

Description:

* Type: General

Data Group:

Information

* Number: 12345

Area: Area

* Calendar: Standard

Costing

* Cost Per Hour (\$): 0

Cost Center:

Clock-In and Clock-Out

Comments:

Cancel Back Create

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

Data Group:

Information

* Owner Role: Administrators

Information URL:

Distribution List:

Send Notification On Changes:

Send Notification When Certification is Required:

Permissions

Allow Manual Grants:

Comments:

Cancel Create

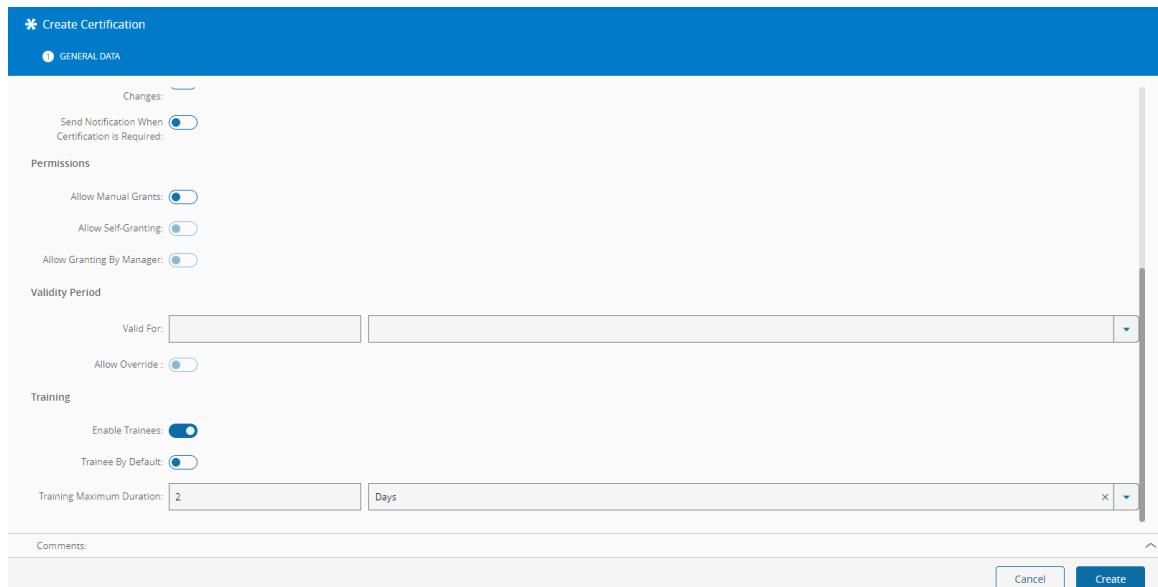
Several properties must be configured in the **Certification** to allow trainees:

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.

Property	Description
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: 2 Days

Allow Override:

Training

Enable Trainees:

Trainee By Default:

Training Maximum Duration: 2 Days

Comments:

Cancel Create

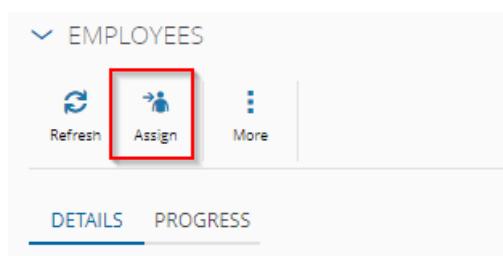
Info

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

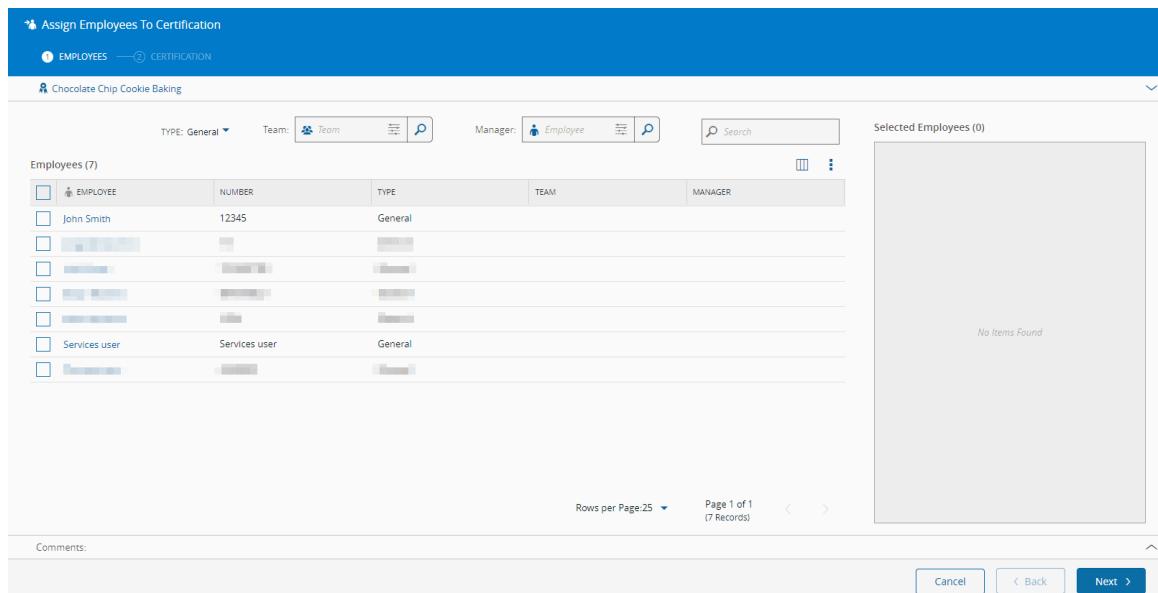
Select **Create** to move to the next step.

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** section in the **Details** view and select **Assign** located on top of the grid:



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



The screenshot shows the 'Assign Employees To Certification' page. The left pane displays a list of employees with columns for Employee, Number, Type, Team, and Manager. The right pane shows a list titled 'Selected Employees (0)' with a message 'No Items Found'. Navigation buttons at the bottom include 'Comments', 'Cancel', 'Back', and 'Next'.

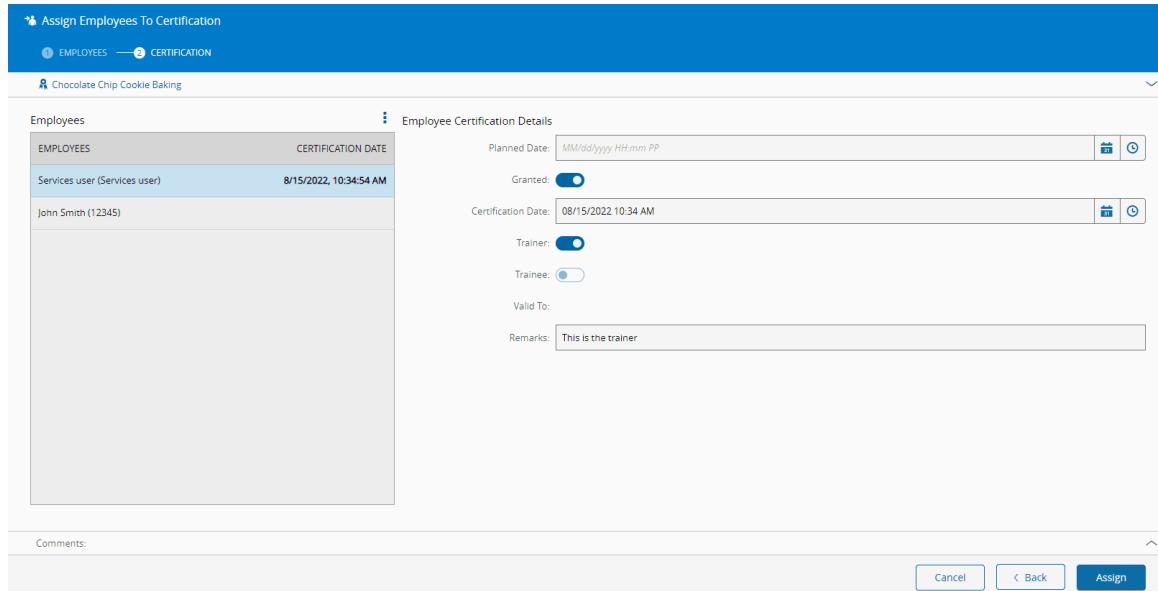
In this section you can configure the **Certification** assignment for both **Employees**. Ensure that the Trainer and Trainee are configured accordingly:

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**.



The screenshot shows the 'Assign Employees To Certification' page with the 'Employee Certification Details' section open. It includes fields for Planned Date, Granted (checked), Certification Date (set to 08/15/2022 10:34 AM), Trainer (checked), Trainee (unchecked), and Remarks (set to 'This is the trainer'). Navigation buttons at the bottom include 'Comments', 'Cancel', 'Back', and 'Assign'.

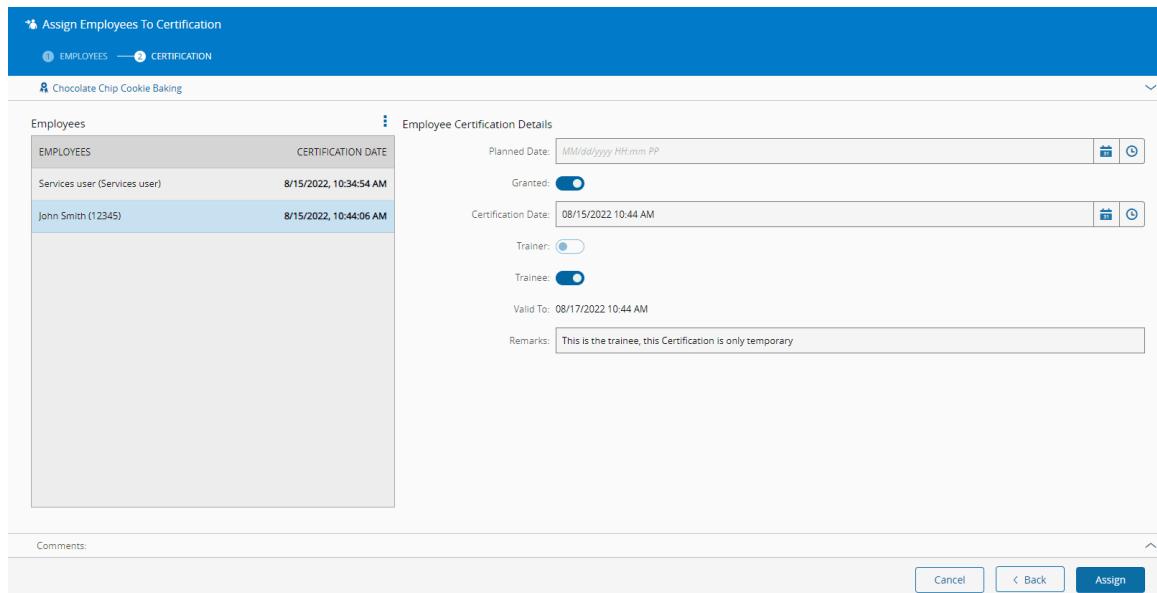
Trainee

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.



Assign Employees To Certification

EMPLOYEES — CERTIFICATION

Chocolate Chip Cookie Baking

EMPLOYEES	CERTIFICATION DATE
Services user (Services user)	8/15/2022, 10:34:54 AM
John Smith (12345)	8/15/2022, 10:44:06 AM

Employee Certification Details

Planned Date:  

Granted: 

Certification Date:  

Trainer: 

Trainee: 

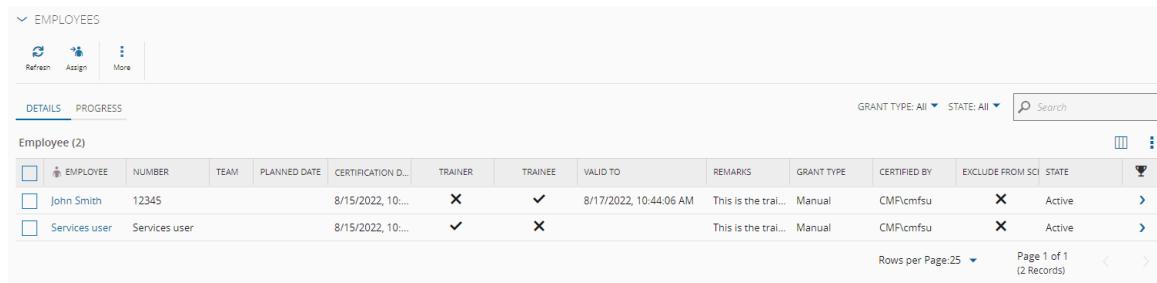
Valid To: 08/17/2022 10:44 AM

Remarks:

Comments:

Cancel Back Assign

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



EMPLOYEES

REFRESH  More

DETAILS PROGRESS

GRANT TYPE: All STATE: All 

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, 10:3...	8/15/2022, 10:44:06 AM	X	✓	8/17/2022, 10:44:06 AM	This is the tra...	Manual	CMR cmfsu	X	Active	
Services user	Services user		8/15/2022, 10:3...	8/15/2022, 10:44:06 AM	✓	X	8/17/2022, 10:44:06 AM	This is the tra...	Manual	CMR cmfsu	X	Active	

Rows per Page: 25 Page 1 of 1 (2 Records)

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. Navigate to the **Personnel** section in the **Details** view and select **Manage** located on top of the grid:



Mixer-04 (Active)

PERSONNEL

Manage

Check-In Options

Enable Check-In: No

Restricted: No

Enforce Personnel Requirements at Track-In:

Automatically Check-Out No

Employees at End-of-Shift:

Require Check-In for Material Operations: No

Require Check-In for Resource Operations: No

Employees Can Check-Out No

Others on Check-In:

Log Check-In Activity: No

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 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:

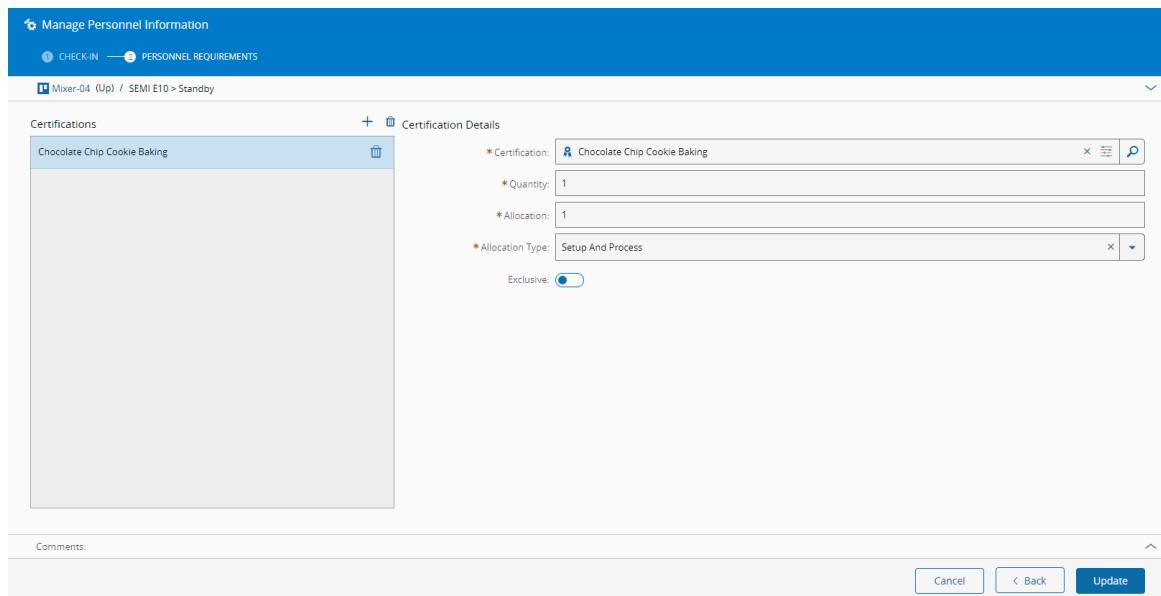
Log Check-In Activity:

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](#).



Manage Personnel Information

CHECK-IN — PERSONNEL REQUIREMENTS

Mixer-04 (Up) / SEMI E10 > Standby

Certifications

Chocolate Chip Cookie Baking

Certification Details

* Certification: Chocolate Chip Cookie Baking

* Quantity: 1

* Allocation: 1

* Allocation Type: Setup And Process

Exclusive:

Comments:

Cancel Back Update

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:



Check-In at Resource

POSITION SELECTION — CHECKED-IN EMPLOYEES

Mixer-04 (Up) / SEMI E10 > Standby

Select a Certification

Positions

Chocolate Chip Cookie Baking (Signature Required)

1 required, 0 checked-in

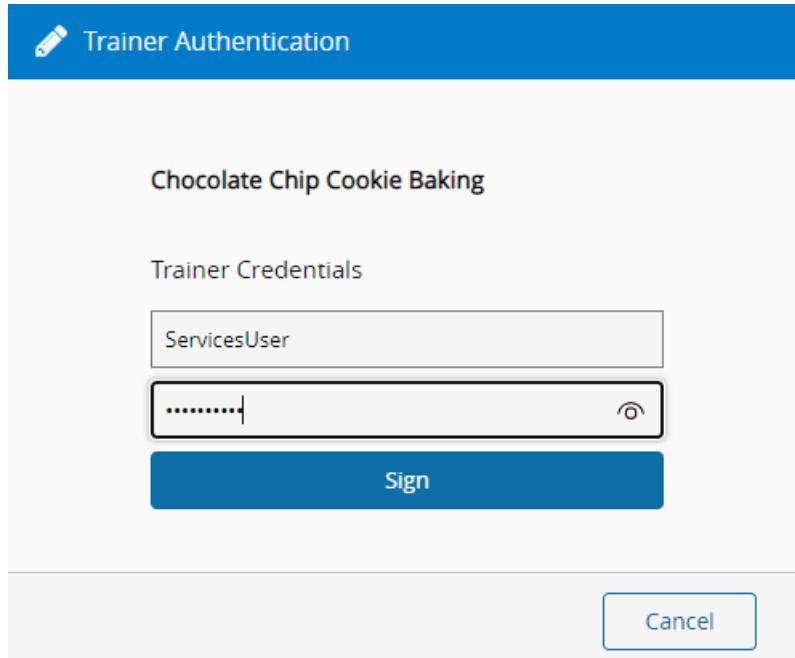
Comments:

Cancel Back Next >

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.

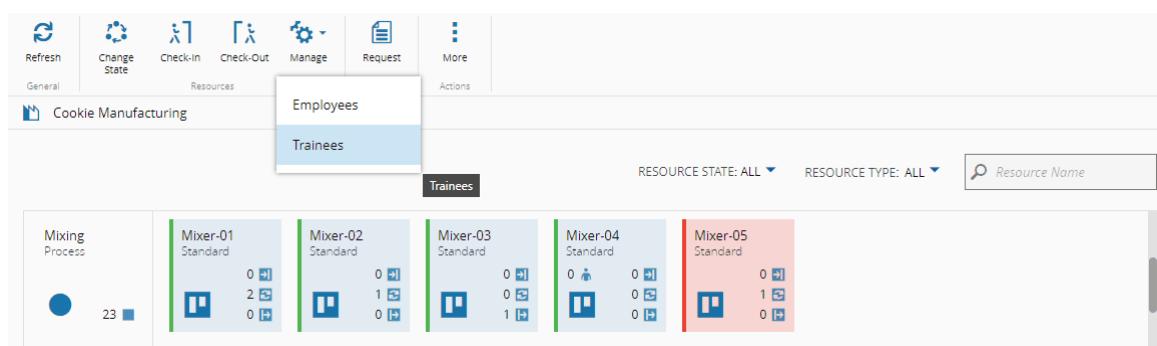
Select the **Certification** and proceed to the next step, since there are no other **Employees** checked-in. When attempting to complete the check-in process, a window will be displayed requiring a signature from a defined Trainer for that **Certification** in that **Resource**:



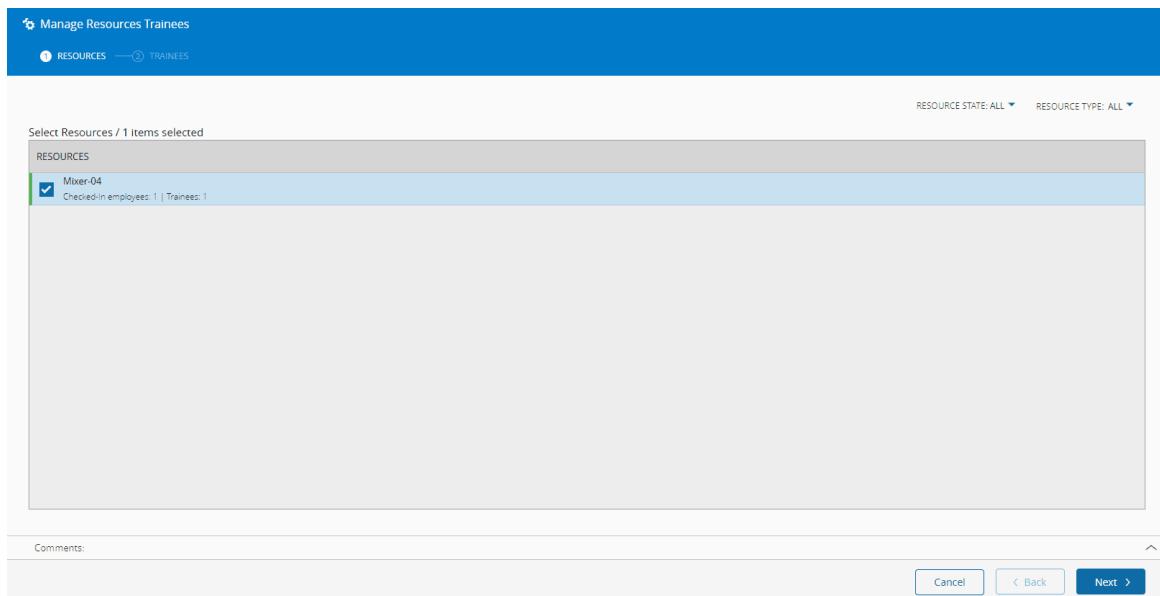
After the signature (biometric, password or PIN) is entered, the Trainee can continue with the process.

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**.

**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.



Select Resources / 1 items selected

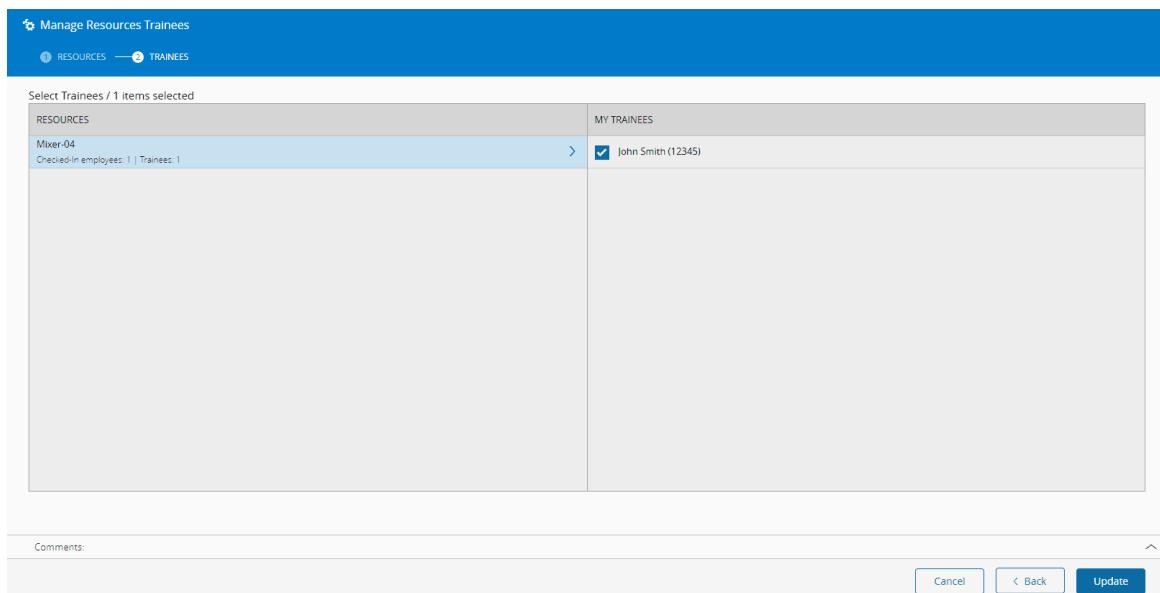
RESOURCES

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.



Select Trainees / 1 items selected

RESOURCES	MY TRAINNEES
Mixer-04 Checked-in employees: 1 Trainees: 1	> <input checked="" type="checkbox"/> John Smith (12345)

Comments:

Cancel < Back Update

 **Info**

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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