Licence Master Data

Licence Types

Define licence types that will be used to categorise licence definitions. The type of a licence definition will be used, within an employee location and licence type relationship, by the licence approval workflow process to determine the workflow recipients who will be required to action the workflow.

7.1 Licence Types

Path: System Administration | Modules | Manage Employees | Master data | Licence Type

Define licence types that will be used to categorise licence definitions. The type of a licence definition will be used, within an employee location and licence type relationship, by the licence approval workflow process to determine the workflow recipients who will be required to action the workflow.

- On the licence type page click 'Add' to add new licence type.
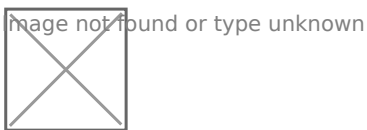- Complete the licence type detail and click 'Save'.

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Figure 22: Licence Type Detail

Definition Catalogue

Define licence definitions that will be linked to an employee's job/position profile, added to the employee's ad hoc licence section or added to an employee's public licence section. In the licence definitions we differentiate between public licences and 'other' licences because they are managed with separate rules. Public licence specific set-up and configuration is explained seperately.

7.2 Licence definitions catalogue

Path: System Administration | Modules | Manage Employees | Master data | Licence definitions

- On the Licence Definition Catalogues page click 'Add'.
- Complete the licence definition detail accurately.
- Add Prerequisite licences.
- Add Training interventions.
- Add Standards.

* It is highly recommended to add at least one requirement to a licence definition. Training, standard and licence requirements are linked to a licence definition to ensure that an employee completes all the requirements before a licence is issued to the employee by the system.
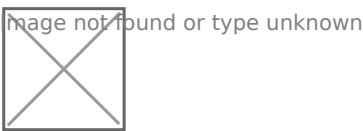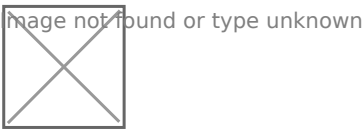

Figure 23: Licence definitions

7.2.1 Complete the licence definition detail

Carefully think through the following settings/values and populated them as accurately as possible. These settings play a crucial role in the management of licences:

Licence type:	Select a type to categorise the licence definition.
Default Expiry Period:	Select the period that the licence will be valid for. Applies to public licences and ad hoc licences (only if '*Ad-hoc licence must ALWAYS follow requirement learner records validity dates*' is OFF).
Approved via workflow:	Select if the licence requires workflow for approval. YES: Set the licence status to Outstanding and send it for approval via workflow. NO: Set the licence status to Valid without sending it for approval via workflow.

This licence is used to group other licences:	Select if this licence definitions will be used to group other licences and select the licence types that should be grouped with this licence. Figure 24: Group the following licence types If a person has this licence and other licence(s), this licence will be the primary licence. If printed any other licences, of the selected licence types, will be grouped under this licence and will also be printed on same the licence card. You will not be able to print any licences if there is no primary licence on an employee's profile.
Public licence:	Select if this licence definition will be used as a public licence.
Colour to Display In:	If printed, this colour, will determine the colour of the licence card if the licence is a grouping licences.

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Figure 25: Licence definition detail

7.2.2 Add prerequisite licences

If the validity of a licence is dependent on the validity of another licence, then the required licence is linked as a prerequisite licence to ensure that an employee completes all the required licences. All training intervention and unit standards linked to a prerequisite licence will also be requirements on the licence definition it is linked to.

- Activate the Prerequisite licences tab.
- Click 'Add'.
- Select a licence from the licence definitions catalogue. Only licences with a licence definition status (licence definition detail) = 'Can be used' will be available for selection.
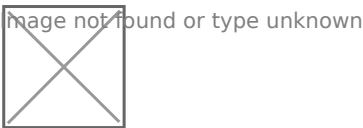

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Figure 26: Prerequisite licences

7.2.3 Add Training Interventions

If the validity of a licence is dependent the completion of specific training courses, then the required courses are linked to the licence definition to ensure that an employee completes all the required courses.

- Activate the Training interventions tab.
- Click 'Add'.
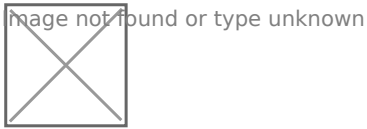- Select a training intervention from the library.

Figure 27: Training intervention requirements

7.2.4 Add Standards

If the validity of a licence is dependent the completion of specific unit standards, then the required unit standards are linked to the licence definition to ensure that an employee completes all the required standards.

- Activate the Standards tab.
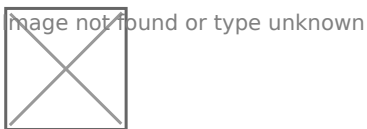- Click 'Add'.
- Select a unit standard from the library.

Figure 28: Unit standard requirements

Licence Code

Define licence codes that will be used to manage public licences. When a public licence is added to an employee's profile the licence code is a mandatory field.

7.3 Licence code

Path: System Administration | Modules | Manage Employees | Master data | Licence Code

- On the licence code page click 'Add'
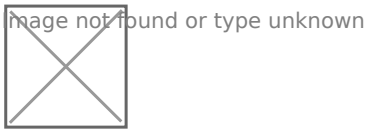- Complete the licence code detail and click 'Save'.

Figure 29: Licence code detail

Public Licence

7.4 Public licence set-up and configuration

- Create public licence training interventions e.g. *Code B; Motor Vehicle Licence*.
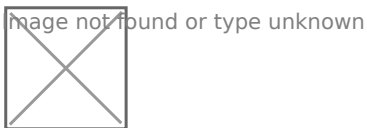- Set the learner record expiry options.

Figure 30: Public licence learner record expiry options

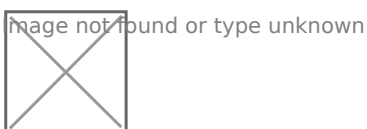- Set up equivalent training interventions (training intervention related courses).

Figure 31: Public licence training intervention equivalents

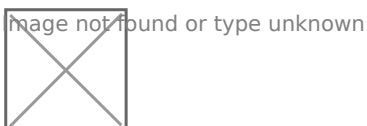- Create a licence type = Public Licence.

Figure 32: Public licence type

- Create a licence definition for each public licence training intervention. The name of the training intervention and the licence definitions should be an exact match.
- Configure the licence definition as a public licence.

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Figure 33: Public licence configuration

- Set the default expiry period = learner record expiry options.

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Figure 34: Public licence default expiry period

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- Link the training intervention to the licence definition.

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Figure 35: Public licence definition