Licence Processing (Rules)

How to Process a Licence

Licence processing is a procedure that creates and updates all employee licence records as well as workflow instances based on a set of pre-defined rules. This procedure can be scheduled to be executed automatically, or it can be executed for each employee individually from Manage Employees.

6.1 Move active workflows to Senior Training Officer

When a workflow instance has been with an engineer (workflow approver) for more than 24 hours, the workflow instance is moved to the senior training officer.

6.2 Process public licences

Public licences are not processed with the standard licence processing rules. The below rules apply to public licences only:

- When a new licence record was added to the public licences section, a learner record is created for the public licence requirement. The ‘Training date’ on the requirement learner record is equal to the ‘Valid From date’ of the licence record.

- When the licence name or validity dates changed on the licence record, the requirement learner record updates accordingly.

- When a ‘Valid’ record was updated with invalid dates, the licence status updates to ‘Expired’.

- When an ‘Expired’ record was updated with valid dates, the licence status updates to ‘Valid’.

- When the licence record was deleted, the requirement learner record is deleted.

6.3 Reset ‘Excluded from processing’ status

With the licence import, the administrator can import licences with a flag ‘Excluded from processing’. When ‘Excluded from processing’ = **True**, the licence record will not be processed and will remain as it is even if the requirements are outstanding. Processing will only update the ‘Excluded from processing’ status of a licence record from ‘True’ to ‘False’ and will continue to follow the standard licence processing steps when:

- All requirements are met, and
- Changes to the requirement learner records causes the start date or expiry date of a licence record to change, and
- Workflow is required. Or,
- The licence record reached the expiry date.

6.4 Create new licence records

When a licence meets all licence requirements for the first time:

- A new licence record is created, and
- The licence status updates to ‘Outstanding’.

6.5 Update existing licence records

Licences with a ‘Suspended’ or ‘Outstanding-declined’ status will not be considered for processing even if all requirements are met, they require a manual action to update the status.

- Updates the status of a licence to ‘Outstanding’ when all requirements are met, and workflow is required for approval.

- Updates the status of a licence to ‘Valid’ when all requirements are met, and workflow is not required for approval.

- Updates the status of a ‘Valid’ licence to ‘Outstanding’ when:
  - Changes to a requirement learner record caused the validity dates of the licence record to change, and
  - The requirements are still met, and
  - Workflow is required for approval.
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- Updates the status of a licence to ‘Expired’ when (except for Exception Rule #1):
  - Changes to a requirement learner record caused the validity dates of a ‘Valid’ licence record to invalid dates, or
  - The requirements are no longer met (i.e. at least one requirement learner record is expired), or
  - The licence reached the expiry date (this will apply to ad hoc licences if custom validity dates are used).
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- Exception Rule #1 - Updates the status of an ‘Outstanding’ licence to ‘Outstanding’ and not to ‘Expired’ when:
  - The requirements are no longer met because a requirement learner record is ‘Expired’, and
  - **The licence has not been approved via workflow up to date**.
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- Exception Rule #2 - Updates the status of a licence (from ‘Outstanding’, ‘Expired’, ‘Valid’, ‘Outstanding-declined’ or ‘Not in Use’)to ‘Outstanding’ and not to ‘Expired’ when:
  - A requirement learner record is ‘Outstanding’ and the requirements are not met (the number of requirements > the number of completed requirements).

6.6 Create and close workflows

- Create workflow instances for licence records (new and existing) when:
- All requirements are met, and
- The licence status is ‘Outstanding’, and
- Workflow is required for approval, and
- A workflow instance does not already exist.
- When an employee’s location changed and all requirements are still met.

- Close active workflow instances when:
  - A licence record wasremoved from an employee’s current job/position and moved to the previous job/position requirements section of an employee’s licence dashboard.
  - Licence requirements have changed on the licence definition.
  - Changes have been made to licence requirement learner records and caused the licence validity dates to change.
  - An employee’s location changed.
  - A licence has been issued.
  - A licence definition no longer requires workflow for approval.

6.7 Licence movement between sections

- Moves a licence record to the previous job/position requirements section of an employee’s licence dashboard and updates the licence status (from ‘Outstanding’, ‘Expired’, ‘Valid’, ‘Outstanding-Declined’ or ‘Suspended’) to ‘Not in Use’ when:
  - A licence was removed from an employee’s current job/position requirements or,
  - An employee was transferred from one position to another and the licence is not a job/position requirement on the new job/position or,
  - An employee was terminated.
- Note: A licence in the previous job/position requirements section will always have a ‘Not in Use’ status.

- When a licence in the previous job/position requirements section of an employee’s licence dashboard was added to the employee’s current job/position requirements, the licence

record is moved to the current job/position requirements section of an employee’s licence dashboard and the licence status is updated from ‘Not in Use’ to ‘Outstanding’, ‘Valid’ or ‘Expired’.

- When a licence in the previous job/position requirements section of an employee’s licence dashboard was selected to be used as an ad-hoc licence, licence record is moved to the ad-hoc licences section of an employee’s licence dashboard and the licence status is updated from ‘Not in Use’ to ‘Outstanding’, ‘Valid’ or ‘Expired’.

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’.



Figure 22: Licence Type Detail

- When a licence record was moved to the current job/position requirements or ad-hoc section of an employee’s licence dashboard and a requirement is ‘Suspended’,the licence status is updated from ‘Not in Use’ to ‘Expired’.

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