Manage an Employee's Licences

Introduction to Employee's Licences

The licences section in the Manage Employees module enables an administrator to manage the public licences, ad hoc licences as well as job/position related licences of each employee individually. This section is not restricted to administrators only but can also be accessed by users with the appropriate subgroup permissions, if you are not an administrator and you need to manage licences please ask your administrator to set up the subgroup permissions for your user.

Employee Licence Dashboard

3.1. Employee Licence Dashboard

Path: Modules | Manage Employees | View / Edit Employee | Employee Profile | **Licences**



3.1.1. Licence Status

Indicates the current status of the licence record. Can be any one of 5 statuses.

- Not set
- Outstanding
- Expired
- Suspended
- Valid
- Invalid
- Outstanding-declined
- Not in use

3.1.2. Process Status

Before an employee can collect a licence, there are several steps in the licence process that needs to be completed. This section indicates these steps and the current status of each. There are 5 process statuses.

- Not Set
- Licence Pre-Requisites Met
- In Workflow
- Approved
- Collected
- Declined

Public Licences and PrDP Permits

The public licence section is used to manage public licences an PrDP permits. They are managed separate from ad hoc and job/position related licences because they do not follow the same rules. Only licence definitions configured as a public licence can be linked to the public licence section. When working with public and PrDP licences the correct set-up is crucial.

3.2. Public Licences and PrDP Permits



Figure 10: Public licences acquired by the employee

3.2.1. Basic Sequence of Events

The below diagram displays the basic sequence of events of a public licence. No licence workflow approval is required for licences linked in this section.



Figure 11: Public licence - flow chart

- The employee obtains the public licence or PrDP permit at the municipality.
- The administrator adds a record for the public licence or PrDP permit to the employee’s profile.
- The licence status updates to ‘Valid’.
- During processing a learner record is created for the public licence or PrDP permit. The ‘Training date’ on the learner record is equal to the ‘Valid From date’ of the licence record.

3.2.2. Add a Public Licence or PrDP Permit

A licences configuration setting (‘Allow adding of public licences’) is available to either allow or prevent an administrator from manually adding a public licence.

- Log in as a licence administrator.
- Navigate to an employee’s licence dashboard in manage employees.
- If ‘Allow adding of public licences’ is ON, the ‘Add public licence’ button will be enabled.
- Click ‘Add public licence’.
- Complete the public licence detail.
- Click ‘Save’.
- If the record was added with valid dates, **the licence status updates from ‘Not set’ to ‘Valid’.**
- If the record was added with invalid dates, **the licence status updates from ‘Not set’ to ‘Expired’.**
- Return to the employee’s licences.
- Process licences for this employee.

3.2.3. Public Licence Detail



Figure 12: Public licence detail

Licence name:	From the licence definitions library select a public licence.
Valid From:	Select the start date of the licence from the calendar.
Valid For:	Automatically populated with the Default Expiry Period configured on the licence definition (and training intervention).
Until:	Automatically calculated based on the default expiry period.
Public licence code:	Select a value from the dropdown. The list of values returned in the dropdown is master data that needs to be pre-populated by the administrator.

3.2.4. Edit or Delete a Public Licence or PrDP Permit

- To edit a public licence or PrDP permit:
  - In die ‘Action’ column click ‘Action’ and select ‘View / Edit’.
  - Make the required changes to the record.
  - Click ‘Save’ and return to the employee’s licences.
  - Process licences for this employee.
-
- To delete a public licence or PrDP permit:
  - Mark the licence in the ‘Delete’ column*.
  - Click ‘Delete Public Licence’.
  - Process licences for this employee.

* Cannot delete a licence with a suspension history, these records will be locked.

AD HOC Licences

The ad hoc licences section is used to manage additional licences that are not a requirement by the employee’s job/position profile.

3.3. AD HOC Licences Acquired by the Employee



A licences configuration setting (‘Ad-hoc licence must ALWAYS follow requirement learner records validity dates’) is available per schema to specify if a licence in this section should follow the requirement learner records or not.

- If **‘Ad-hoc licence must ALWAYS follow requirement learner records validity dates’** is ON, the licence's start and expiry date should always follow the training and expiry dates of the requirement learner records.
- If **‘Ad-hoc licence must ALWAYS follow requirement learner records validity dates’** is OFF, the licence's start and expiry date should ONLY follow the training and expiry dates of the requirement learner records when the licence’s custom selected validity dates fall outside the bounds of the requirement learner record dates.

3.3.1 Add an ad hoc licence

A licences configuration setting (‘Allow adding of new ad-hoc licences’) is available to either allow or prevent an administrator from manually adding an ad hoc licence.

- Log in as a licence administrator.
- Navigate to an employee’s licence dashboard in manage employees.
- If **‘Allow adding of new ad-hoc licences’** is ON, the ‘Add ad hoc licence’ button will be enabled.
- Click ‘Add ad hoc licence’.
- Complete the licence detail.
- Click ‘Save’.
- The licence status is set to **‘Outstanding’**.
- Return to the employee’s licences and process licences for this employee.

3.3.2 Licence detail



Licence Name:	From the licence definitions library select a licence.
Valid from: *	Custom select the start date of the licence from the calendar.
Valid for: *	Select the period that the licence will be valid for. If a 'Default Expiry period' is configured on the licence definition detail, then this field will be automatically populated.
Until: *	Automatically calculated based on the valid for period selected or custom select an expiry date.
Reason for licence:	Select a reason from the dropdown.
Required:	Select if the licence is required for compliance and should display on the employee's PDP.

3.3.3 Edit/delete an ad hoc licence

- To edit an ad hoc licence:
  - In die 'Action' column click 'Action' and select 'View / Edit'.
  - Make the required changes to the record.
  - Click 'Save' and return to the employee's licences.
  - Process licences for this employee.
-
- To delete an ad hoc licence
  - Mark the licence in the 'Delete' column*.
  - Click 'Delete'.

* Cannot delete a licence with a suspension history, these records will be locked.

3.3.4 Validity dates configuration setting

Path: System Administration | Tools | Configuration | Framework | Human Resources | Licences

The ad hoc licence section can be configured to either follow the requirement learner records, to determine the licence validity dates, or not. For this a licence configuration setting is available and can be configured per schema.



Figure 13: Setting - Ad-hoc licence must ALWAYS follow requirement learner records validity dates

Licences required by a job/position

Licences in this section cannot be randomly added or removed from an employee’s licence dashboard. Licences will only display in this section when they are linked to an employee’s active job/position licence requirements.

3.4 Licences required by the employee's current job/position



Actions that can be taken on a Licence

In this section, there will be explained what actions can be performed when the "actions" button is selected

3.5 Actions

3.5.1 Add / view (download) a document

The documents tab allows an administrator to upload documents to a licence record, the administrator can also download and view documents again if required. Documents are managed

for each licence record individually.



Figure 14: Documents tab

- In die ‘Action’ column click ‘Action’ and select ‘View / Edit’.
- Select the ‘Documents’ tab.
- Click ‘Add’.
- Complete the document upload.
- Click on the icon in the ‘Download File’ column to view it.

3.5.2 Print a licence card

This functionality enables an administrator to print a licence card and at the same time to save a copy of the printed licence.

In die ‘Action’ column click ‘Action’ and select ‘Print’.

Select an option from the ‘I want to’ dropdown.

Select Yes/No, ‘Is document going to be given to the employee?’

Click ‘Print PDF’.

Close the ‘Licence report’ window.



3.5.3 View / download printed licences

The licences tab displays a print log of the current licence and a link to download previously printed licence cards (if the option was selected to save a document at the time the licences was printed).



Figure 15: Printed licences tab

- In die ‘Action’ column click ‘Action’ and select ‘View / Edit’.
- Select the ‘Printed Licences’ tab.
- Click on the icon in the ‘Download file’ column.

3.5.4 Issue a licence

This functionality enables an administrator to update the licence process by indicating that the licence was collected by the employee.

In die ‘Action’ column click ‘Action’ and select ‘Collect’.

Complete the actual time and date the licence was collected.

Add a comment if applicable.

Click ‘Collect Licence card’.

Select Yes/No, ‘Do you also want to close the workflow?’

* The collection date and time cannot be before the printed date and time.



3.5.5 Re-route Workflow

This functionality enables an administrator to move a workflow instance from one workflow owner to another. Only employees configured as workflow location recipients will be available for selection in the ‘move to’ dropdown.

- In die ‘Action’ column click ‘Action’ and select ‘Re-route workflow’.
- Select a new workflow owner from the ‘move to’ dropdown.
- Click ‘Re-route workflow’ to complete the action.

3.5.6 Create Workflow

This functionality was developed to enable a system administration to force a licence into workflow. A licence administrator will be able to force a licence into workflow when:

- All requirements are met, and
- Workflow is required for approval, and
- Workflow does not already exist.

3.5.7 View History

The history displays a detailed change log of the licence record. The log also displays the licence status at the time of each log.

- In die ‘Action’ column click ‘Action’ and select ‘View history’.
- Click ‘Export’ to export the data to excel.



Figure 16: View history

3.5.8 View Requirements for a Licence

An information icon in the action column allows an administrator to view all the requirements of a licence and the employee’s progress in obtaining them.

- In die ‘Action’ column click on the information icon.
- The status column indicates the status of each requirement.



3.5.9 Suspend a Licence Record

- In die ‘Action’ column click ‘Action’ and select ‘View / Edit’.
- Click ‘Suspend licence’.
- Complete the Licence suspension details.



Figure 17: Licence suspension details

Suspend from:	Select the date of the suspension.
Upload document:	Provide suspension documentation (optional).
Comment:	Add a comment (mandatory).

- Click ‘Suspend licence’ and return to the employee’s licences.
  - The licence process status updates to ‘Not set’.
  - If a valid record was suspended, the licence status updates from ‘Valid’ to ‘Suspended’.
  - If an expired record was suspended, the licence status updates from ‘Expired’ to ‘Suspended’.



Figure 18: Suspended licence record

- The licence expiry date updates from the initial expiry date to the date of suspension.
- The licence status of any licence that depends on the suspended licence (where it is a requirement on the licence definition) also updates to suspended.



Figure 19: Suspended licence requirement

- Click ‘View / Edit’ on any licence that depends on the suspended licence.
- Locate the section: ‘The following licence(s), which are requirements for this licence, has been suspended:’



3.5.10 Lift the Suspension from a Licence Record

- In the ‘Action’ column click ‘Action’ and select ‘View / Edit’.
- Click ‘Lift Suspension’.
- Complete the lift suspension licence details.



Figure 20: Lift suspension licence details

Lift suspension on:	Select the date on which the suspension will be lifted.
Upload document:	Provide suspension documentation (mandatory).
Comment:	Add a comment (mandatory).

- Click ‘Lift Suspension’ and return to the employee’s licences.
- Individually lift the suspension from any licence that was affected by the suspension. Thesuspension will not be automatically lifted from any other licence that depends on the previously suspended licence (where it is a requirement on the licence definition).
- When the suspension was lifted from an Ad hoc or job/position related licence, the licence status updates from ‘Suspended’ to ‘Outstanding’.
- When the suspension was lifted from a public licence and the licence record dates are valid, the licence status updates from ‘Suspended’ to ‘Valid’.
- When the suspension was lifted from a public licence and the licence record dates are invalid, the licence status updates from ‘Suspended’ to ‘Expired’.
- Process licences for this employee.
  - See Licence Processing (Rules) section in this document.
  - The licence expiry date updates from the date of suspension to the actual expiry date.

3.5.11 View Workflow Audit

When a licence is currently in workflow the workflow ref. #number is displayed in the ‘In Workflow’ column. The ref. #number is also a link that enables the administrator to view the workflow audit of the current licence.

In the ‘In workflow’ column click on the ‘ref. #number’ link to open the workflow audit window.



Revision #2
Created 2021-03-27 15:43:19 UTC
Updated 2021-03-27 15:46:35 UTC