3t Transform
Data Integrity

TRANSFORM

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1. Data Integrity

Within this document will explain the importance of the data received within each import template. The sections within this document will detail the information required for uploading the data into the system. It is extremely important that the below information is added correctly to ensure a smooth input of data into the system.

2. Training Management System

2.1. Employee Template

The employee template holds all information for the employee's that are to be imported into the system, the template can include all information for active employee's and leavers. The fields on the excel template include both mandatory and optional fields. The fields within the document are as follows:

Field	Mandatory/Optional	Information
Title	Optional	Mr, Miss, Ms, Mrs etc
First Name (s)	Mandatory	This will include the first name and any middle names of the employee
Surname	Mandatory	This will include the surname of the employee
Start Date	Optional	This is the employment start date of the employee
Home Location	Optional	This will include information of the employee's home location, this can be either Town, City, Post Code
Work Location	Optional	This will include information of the employee's work location, this can be either Town, City, Post Code
Project/Department	Mandatory	This will include the Project/Department information that the employee is assigned to. *Please note that field is configurable within the system and can be renamed to suit*
NI Number	Optional	This will include the National Insurance Number of the employee. If this information is not required, this field can be used as another unique identifier. *Please note that field is configurable within the system and can be renamed to suit.*
Payroll/Employee Number	Optional	This is the employee number that relates to the employee
Employment Status	Optional	This states whether the employment status of the employee is Active or not
Hire Date	Optional	This is the employment start date of the employee
Mobilisation Date	Optional	This is the date the employee is due to mobilise
Person Type	Optional	This will be if the employee is: Employee Agency Contractor

		Third Party Other
NOK Name	Optional	This is the next of kin details for the employee (First Name and Surname)
NOK Address	Optional	This is the next of kin address details for the employee
NOK Contact Number	Optional	This is the next of kin contact number for the employee
~~Employment Company~~	~~Optional~~	~~This field is no longer active~~
~~Contracting Company~~	~~Optional~~	~~This field is no longer active~~
Home Address Street	Optional	This is the employee's first line of address
Home Address Town	Optional	This is the employee's town of address
Home Address Postcode	Optional	This is the employee's home postcode
Vantage Number	Optional	This is the Vantage number of the employee. Vantage number is the unique number given by Vantage for guys that are going offshore. *Please note that field is configurable within the system and can be renamed to suit*
Job Role	Mandatory	This is the job role for the employee. If there are multiple job roles for employee's, then we will need duplicate entries for the employee with the relevant job roles on each entry
Email	Mandatory	This is a unique field and must be entered for each employee
Correspondence Email	Optional	This is a mandatory field and can be used as a secondary email for the employee
Work Number	Optional	This is the work telephone number for the employee
Home Number	Optional	This is the home telephone number for this employee
Contract Type	Optional	This is the contract type for the employee i.e. full time, part time, contractor
Client	Mandatory	This will include the Client information that the employee is assigned to. *Please note that field is configurable within the system and can be renamed to suit*
Asset/Site	Optional	This is the contract asset/site for the employee – *this can be left blank as this is included within the Client or Project Fields*
Supervisor Email	Optional	This is the supervisor email relating to the employee. This can be used to send notification for approval to employee's if the 2 stage course approval process is activated.
~~Supervisor Hierarchy~~	~~Optional~~	~~This field is no longer active~~
Manager Email	Optional	This is the manager email relating to the employee. This can be used to send notification for approval to employee's if the 2 stage course approval process is activated.
~~Training Admin Manager~~	~~Optional~~	~~This field is no longer active~~

Mark as Leaver	Optional	Please include 'Yes' or 'No' to state if the employee is a leaver
Mark as Archive	Optional	Please include 'Yes' or 'No' to state if the employee is archived
Cost Centre	Optional	This is to include any information relating to a specific cost centre the employee could be assigned to

2.2. Training History Template

The training history template will include all the training history that is to be uploaded for each employee. It is important that the following fields match the information provided on the employee template for import purposes:

EmployeeID
Delegate Name
DOB
NI Number

Please note, if the above fields do not match the information on the employee template, then the import will fail as this will not know what employee to match the training history to.

The fields on the excel template include both mandatory and optional fields. The fields within the document are as follows:

Field	**Mandatory/Optional**	**Information**
EmployeeID	Optional	This is the employee number which would have been provided within the 'Payroll/Employee Number' field on the employee data. *This is to be included if this information was provided in employee data*
Delegate Name	Mandatory	This is the name of the employee (combined first name and surname and any applicable middle names), this should be the same as what was included on the employee data
DOB	Mandatory	This is the DOB of the employee, this should be the same as what was included on the employee data
NI Number	Optional	This is the NI Number which would have been provided within the 'NI Number' field on the employee data. *This is to be included if this information was provided in employee data*
Date Completed	Mandatory	This is the awarded date of the certificate
Expiry Date	Mandatory	This is the expiry date of the certificate
Course Name	Mandatory	This is the course name of the certificate

Course ID	*Mandatory*	*To be complete by 3T Transform*
Is Internal	*Mandatory*	*To be complete by 3T Transform*

The information uploaded will include the entry of the training history only, this will not include any certificate documents.

2.3.Matrix Import Template

The matrix template will include all information of matrices that are to be uploaded into the system. These are to be assigned to each employee based on job role, the job role must be in the system and then the matrices added against the relevant job role. It is important that the following fields match the information provided on the employee template for import purposes:

Client
Project
Matrix Name

Please note, if the above fields do not match the information on the employee template, then the import will fail to assign matrices to the employee, meaning employees could have no matrices assigned to them.

It is important that the following fields match the information provided on the training history template for import purposes:

Course Name
Course ID
Internal (y/n)

Please note, if the above fields do not match the information on the training history template, then once the import has been completed there could potentially be employees marked as non-compliant, as the course names on the training history must match the matrices so that the course names/ID's can be matched to show compliance.

The fields on the excel template include both mandatory and optional fields. The fields within the document are as follows:

Fields	**Mandatory/Optional**	**Information**
Client	Mandatory	This will include the Client information that the matrix is assigned to. This should match the name of the 'Client' field that has been included in employee data. This will allow matrices to be assigned to employee assigned to the client.
Project	Mandatory	This will include the Project information that the matrix is assigned to. This should match the name of the 'Project/Department' field that has been included in employee data. This will allow matrices to be assigned to employee assigned to the project.

Matrix Name	Mandatory	This should be the name of the matrix, however this should match against the relevant job role
Stage Name	Mandatory	This stage can be called anything based on the business's current set up and this will be the stage name for all courses that are required to be completed within this stage. For example, this could be called Mandatory and all courses which are Mandatory requirements could sit within this stage. You can have multiple stages within one matrix or have all courses sitting under one stage.
Stage Type	Mandatory	One of the below selections are required to be selected for the 'Stage Type' Pre-Employment Pre-Mobilisation Post-Employment Post-Mobilisation This indicate that all of the courses sitting within this stage need to be completed within one of the above categories. Please note this is at a stage level and not at a course level
Course Name	Mandatory	This is the course that needs added onto the matrix. This course name must match the name as per the training history template, this will ensure that any training history which is being uploaded matches the matrices to show compliance
CourseID	Mandatory	*To be complete by 3T Transform*
Internal (y/n)	Mandatory	*To be complete by 3T Transform*
Deadline	Mandatory	This is to be listed within numbers, which will be assigned against the stage to show when the courses within this stage should be completed against. If there is a job role start date against the employee, this would then show on the matrix when this course should be completed by based on job role start date.
Deadline Type	Mandatory	This is to be listed within months or weeks and should match with the 'Deadline' number, which will be assigned against the stage to show when the courses within this stage should be completed against. If there is a job role start date against the employee, this would then show on the matrix when this course should be completed by based on job role start date.
Course Type	Mandatory	This course type is to be added which will match on the course. The course type should be one of the following Mandatory Nomination Client Training Offshore Offshore Only

Reimbursable (y/n)	Mandatory	This states whether the course is reimbursable and can be charged back to the client. This should be listed as either 'y' or 'n'
Certificate Expiry Duration	Mandatory	This will state on the training matrix the expiry duration of the certificate. This will note to the administrators when uploading a certificate, the expiry validity against this certificate. Please include in numbers the expiry duration in years, this can be from 0 – 10. Please note 0 would be used for courses that do not have an expiry date. If you do not wish to use this feature please include 'Not Set' in the field.

3. Competence Management System

3.1. Competence Library

Fields	**Mandatory/Optional**	**Information**
Name	**Mandatory**	This will be the name of the competence assessment that candidates are to be assessed against.
Subheading	**Mandatory**	If there is a short subheading that is against this competence, please include here, if not, you can include the same as the competence name or include n/a.
Awarding Body	**Mandatory**	If this there is an awarding body of this assessment please include here, if not please include n/a.
Description	**Optional**	Include description of the competence assessment, if applicable
Unit	**Mandatory**	Include the competence assessment unit title. If multiple tasks sit within the unit title, then the unit must be repeated to account for the amount of tasks.
Unit Description	**Optional**	If there is a description of this unit, please include here, if not, please include n/a.
Unit Risk Ranking	**Mandatory**	There must be a risk ranking included against the unit, the number against the below option must be included on the spreadsheet; Not Applicable – 0 High Risk – 1 Medium Risk – 2 Low Risk - 3
Unit Safety Rating	**Mandatory**	There must be a safety rating included against the unit, the number against the below option must be

		included on the spreadsheet; Standard - 0 Safety Critical – 1 Business Critical - 2
Task	**Mandatory**	The tasks listed, will be tasks that must be completed within the unit.
Method of Assessment	**Mandatory**	Include the relevant method of assessment that is to be applied to this task. The number against the below options must be included on the spreadsheet. Not Appliable – 0 Observation – 1 Accreditation of Prior Learning – 2 Questions – 3 Simulation – 4 Witness Testimony – 5 Professional Discussion – 6 Demonstration – 7 Observation or Simulation – 8 Documented Evidence – 9 Observation with video – 10 Work Product – 11
Type	**Mandatory**	Include the relevant method of assessment type, the number against the below options must be included on the spreadsheet. Not Applicable – 0 Performance – 1 Knowledge – 2 Practical - 3
Task Risk Ranking	**Mandatory**	There must be a risk ranking included against the task, the number against the below option must be included on the spreadsheet; Not Applicable – 0 High Risk – 1 Medium Risk – 2 Low Risk - 3
Task Safety Rating	**Mandatory**	There must be a safety rating included against the task, the number against the below option must be included on the spreadsheet; Standard - 0 Safety Critical – 1 Business Critical - 2
Is Scorable	**Mandatory**	If you are including tasks within your competence assessment then this must be yes.
Sub Task	**Mandatory**	The subtasks listed, will be subtasks that must be completed within the task.
Sub Task Method of Assessment	**Mandatory**	Include the relevant method of assessment that is to be applied to this subtask. The number against the below options must be included on the spreadsheet. Not Appliable – 0

		Observation – 1 Accreditation of Prior Learning – 2 Questions – 3 Simulation – 4 Witness Testimony – 5 Professional Discussion – 6 Demonstration – 7 Observation or Simulation – 8 Documented Evidence – 9 Observation with video – 10 Work Product – 11
Sub Task Type	**Mandatory**	Include the relevant method of assessment type, the number against the below options must be included on the spreadsheet. Not Applicable – 0 Performance – 1 Knowledge – 2 Practical - 3
Sub Task Risk Ranking	**Mandatory**	There must be a risk ranking included against the subtask, the number against the below option must be included on the spreadsheet; Not Applicable – 0 High Risk – 1 Medium Risk – 2 Low Risk - 3
Sub Task Safety Rating	**Mandatory**	There must be a safety rating included against the subtask, the number against the below option must be included on the spreadsheet; Standard - 0 Safety Critical – 1 Business Critical - 2
Is Scoreable	**Mandatory**	If you are including subtasks within your competence assessment then this must be yes.

4. Client Sign Off

The data being input into the system will be signed off by the client prior to import to ensure all of their data is as expected on the 3T Transform templates. The data will then be uploaded into the test site for review, if the client is happy with the data, this will then be uploaded into the live site.

Once the data is in the live site, the client will have 5 working days to notify 3T Transform of any issues so these can be corrected by the team. Anything outside of these 5 days will need to be corrected by the client.