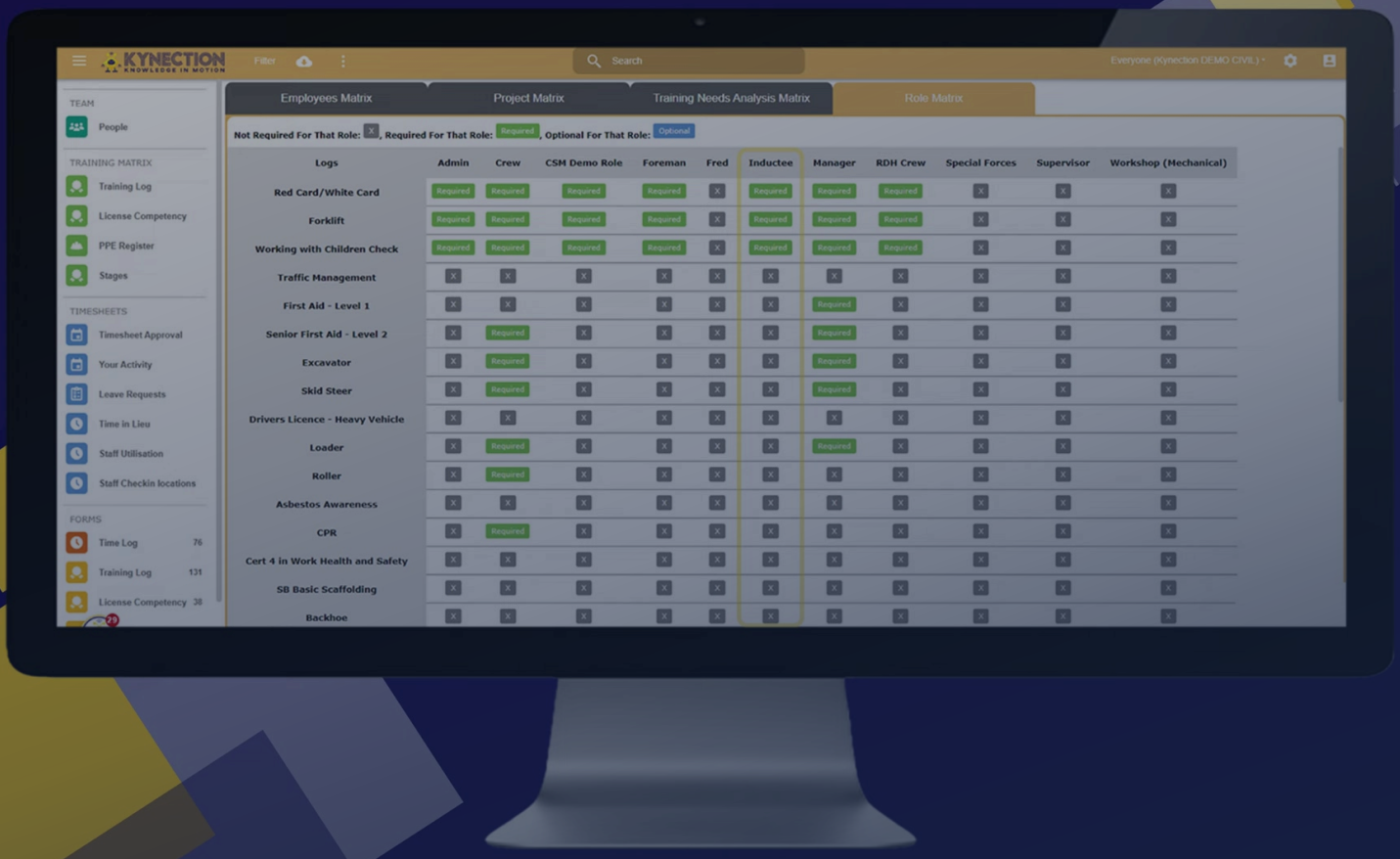




KYNECTION
KNOWLEDGE IN MOTION

MODULE OVERVIEW

KYNECTION • HUMAN RESOURCES • HR SETUP

Set Up Roles and *Training Requirements*

The configuration overview. Reading the training matrix, defining what each role requires, then setting up the certificates, expiry warnings and dependencies that make compliance checks run themselves.

5 CHAPTERS

3 MIN 54 SEC

HUMAN RESOURCES

WEB USERS • HR ADMINISTRATORS

MODULE OVERVIEW • 3 MIN 54 SEC

What this module overview covers

Five stages take an administrator from reading the matrix to configuring it. Chapters 1 and 2 cover the four matrix views. Chapters 3 to 5 cover role setup, training settings and certificate dependencies.

CH 01	Read the training matrix The employees matrix is every person against every qualification, colour coded by status.	00:00–00:25
CH 02	Analyse needs by role Four tabs sit across the matrix: employees, project, training needs analysis and role.	00:25–01:05
CH 03	Configure roles and induction Before you can attach training to a role, onboarding has to be set up to accept multiple stages.	01:05–02:00
CH 04	Set up training settings Training settings define the forms, the fields they read, and the certificates behind the matrix.	02:00–03:10
CH 05	Build certificate dependencies Grouping certificates lets one depend on another, and collapses them into a single matrix column.	03:10–03:54

- **Admin only.** Everything past chapter 2 changes configuration for the whole organisation.
- **Global overrides everything.** Updates made at global level override all roles. Change a role rather than the global default unless you mean it to apply everywhere.
- **Colour is the compliance signal.** The matrix colour codes never expiring, expiring within 30 days, expired and not submitted, so gaps are visible without opening a record.

READ AS	Screens are captured from the walkthrough video at the timestamp shown on each step. Names, dates and rates are demonstration data.
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Read the training matrix

The employees matrix is every person against every qualification, colour coded by status.

Employees	Licenses	first aid	Red Card/White Card	Forklift	Working with Children Check	Traffic Management	Excavator
Abraham Citizen	0/3	0/2	X	X	X	X	X
Action Brunton	0/3	0/2	X	X	X	X	X
Adam Campbell	0/3	0/2	!	Not Expired	Never Expire	!	X
Alby Osborne	0/3	0/2	X	X	X	X	X
Alexandra Chapman	0/3	0/2	!	X	!	X	X
Amanda Smith	0/3	0/2	X	X	X	X	X
Amit Salvi	0/3	0/2	X	X	X	X	X
Andrew Middler	0/3	0/2	Never Expire	!	X	X	X
Andy Taylor	0/3	0/2	X	X	X	X	X
Anna Webster	0/3	0/2	X	X	X	X	X

STEP 1 • 00:04 IN THE VIDEO

Open the employees matrix

The matrix lists employees down the side and qualifications across the top: Red Card/White Card, Forklift, Working with Children Check, Traffic Management, Excavator and the rest. Each cell carries a status.

CHAPTER 01 • STEP 1 OF 3

Licenses	first aid	Red Card/White Card	Forklift	Working with Children Check	Traffic Management	Excavator	Skid Steer	Asbestos Awareness	CPR	Cert 4 in W
0/3	0/2	X	X	X	X	X	X	X	X	X
0/3	0/2	X	X	X	X	X	X	X	X	X
0/3	0/2	!	Never expires	!	!	X	X	X	X	X
0/3	0/2	X	X	X	X	X	X	X	X	X
0/3	0/2	!	!	!	X	X	X	X	!	X
0/3	0/2	X	X	X	X	X	X	X	X	X
0/3	0/2	X	X	X	X	X	X	X	X	X
0/3	0/2	Never Expire	!	X	X	X	X	X	X	X
0/3	0/2	X	X	X	X	X	X	X	X	X
0/3	0/2	X	X	X	X	X	X	X	X	X

STEP 2 • 00:11 IN THE VIDEO

Learn the colour key

Green means **Never Expiring**. Amber means **Expiring in 30 Days**. The legend across the top also covers expired, not submitted and no file loaded, so the whole compliance position reads at a glance.

CHAPTER 01 • STEP 2 OF 3

Read the training matrix

Employees Matrix										
Project Matrix										
Training Needs Analysis Matrix										
Role Matrix										
Legend: X Never Expiring: Never Expire Not Expired: Not Expired Expiring Within 30 Days: Warning Expired: Expired Not Submitted: Not Submitted No File Found: !										
Employees	Licenses	first aid	Red Card/White Card	Forklift	Working with Children Check	Traffic Management	Excavator	Skid Steer	Asbestos Awareness	CPI
Jim Citizen	0/3	0/2	X	X	X	X	X	X	X	X
Brunton	0/3	0/2	X	X	X	X	X	X	X	X
Campbell	0/3	0/2	!	Not Expired	Never Expire	!	X	X	X	X
Osborne	0/3	0/2	X	X	X	X	X	X	X	X
candra pman	0/3	0/2	!	X	!	X	X	X	X	!
da Smith	0/3	0/2	X	X	X	X	X	X	X	X
t Salvi	0/3	0/2	X	X	X	X	X	X	X	X
w Middled	0/3	0/2	Never Expire	!	X	X	X	X	X	X
r Taylor	0/3	0/2	X	X	X	X	X	X	X	X
Webster	0/3	0/2	X	X	X	X	X	X	X	X

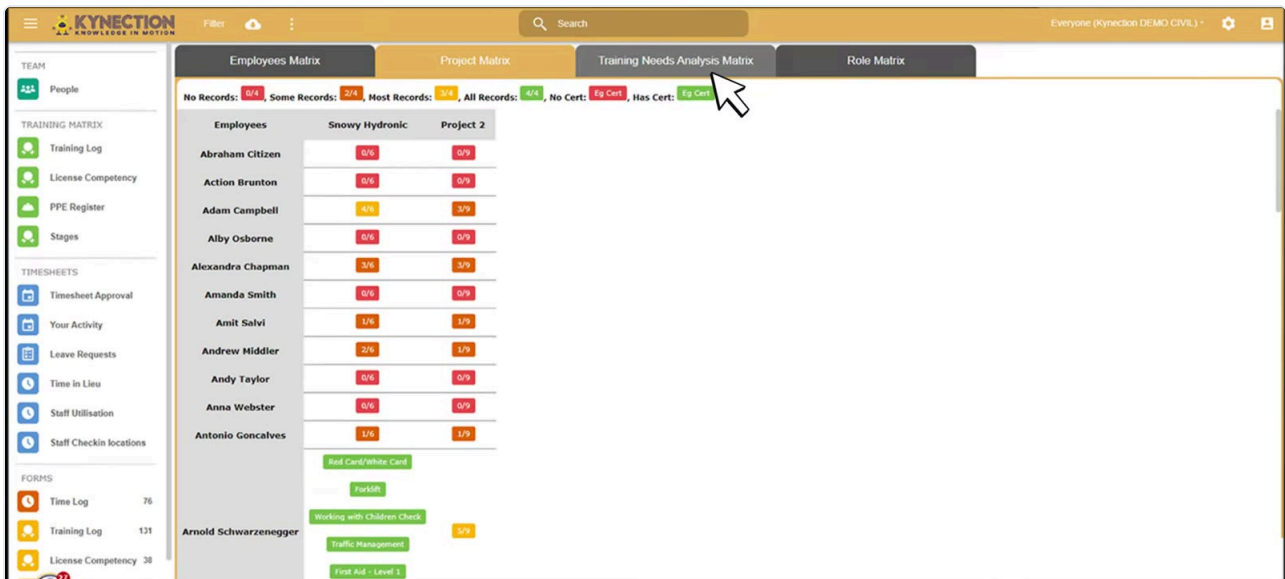
STEP 3 • 00:15 IN THE VIDEO

Scan for gaps

Reading down a column shows who is missing a qualification. Reading across a row shows one person's full position.

Analyse needs by role

Four tabs sit across the matrix: employees, project, training needs analysis and role.



STEP 1 • 00:34 IN THE VIDEO

Open the training needs analysis matrix

The **Training Needs Analysis Matrix** reviews training needs for each employee against what their role requires, which is what turns the raw matrix into an action list.

CHAPTER 02 • STEP 1 OF 3

Logs	Admin	Crew	CSM Demo Role	Foreman	Fred	Inductee	Manager	RDH Crew	Special Forces	Supervisor	Workshop (Mechanical)
Red Card/White Card	Required	Required	Required	Required	X	Required	Required	Required	X	X	X
Forklift	Required	Required	Required	Required	X	Required	Required	Required	X	X	X
Working with Children Check	Required	Required	Required	Required	X	Required	Required	Required	X	X	X
Traffic Management	X	X	X	X	X	X	X	X	X	X	X
First Aid - Level 1	X	X	X	X	X	X	Required	X	X	X	X
Senior First Aid - Level 2	X	Required	X	X	X	X	Required	X	X	X	X
Excavator	X	Required	X	X	X	X	Required	X	X	X	X
Skid Steer	X	Required	X	X	X	X	Required	X	X	X	X
Drivers Licence - Heavy Vehicle	X	X	X	X	X	X	X	X	X	X	X
Loader	X	Required	X	X	X	X	Required	X	X	X	X
Roller	X	Required	X	X	X	X	X	X	X	X	X
Asbestos Awareness	X	X	X	X	X	X	X	X	X	X	X
CPR	X	Required	X	X	X	X	X	X	X	X	X
Cert 4 in Work Health and Safety	X	X	X	X	X	X	X	X	X	X	X
SB Basic Scaffolding	X	X	X	X	X	X	X	X	X	X	X
Backhoe	X	X	X	X	X	X	X	X	X	X	X

STEP 2 • 00:46 IN THE VIDEO

Read the role matrix

The **Role Matrix** is the standard certification requirement for each role. Every cell is **Required**, **Optional** or not required, so a manager and an inductee carry different expectations.

CHAPTER 02 • STEP 2 OF 3

Analyse needs by role

KYNECTION Filter Search Everyone (Kynection DEMO CIVE) ⚙️

Employees Matrix

No Record: [x](#), Never Expiring: [Quantity/Expiry Date](#), Not Expired: [Quantity/Expiry Date](#), Expiring Within 30 Days: [Quantity/Expiry Date](#), Expired: [Quantity/Expiry Date](#), Not Submitted: [Quantity/Expiry Date](#)

Employees	Helmet	Jacket	Gloves	Pants	Boots	Safety Glasses
Abraham Citizen	x	x	x	x	x	x
Action Brunton	x	x	x	x	x	x
Adam Campbell	1-30 Nov 2022	1-20 May 2024	x	x	x	x
Alby Osborne	x	x	x	x	x	x
Alexandra Chapman	x	x	x	x	x	x
Amanda Smith	x	x	x	x	x	x
Amit Salvi	x	x	x	x	x	x
Andrew Hiddler	x	x	x	x	x	x
Andy Taylor	x	x	x	x	x	x
Anna Webster	x	x	x	x	x	x
Antonio Goncalves	x	x	x	x	x	x
Arnold Schwarzenegger	1-30 Sep 2023	x	x	x	x	x
Bart Brichau	x	x	x	x	x	x
Ben Wood	x	x	x	x	x	x
Bob John	x	x	x	x	x	x
Brooke Charlton	x	x	x	x	x	x

TEAM
People

TRAINING MATRIX
Training Log
License Competency
PPE Register
Stages

TIMESHEETS
Timesheet Approval
Your Activity
Leave Requests
Time in Lieu
Staff Utilisation
Staff Checkin locations

FORMS
Time Log 76
Training Log 131
License Competency 38

STEP 3 • 00:58 IN THE VIDEO

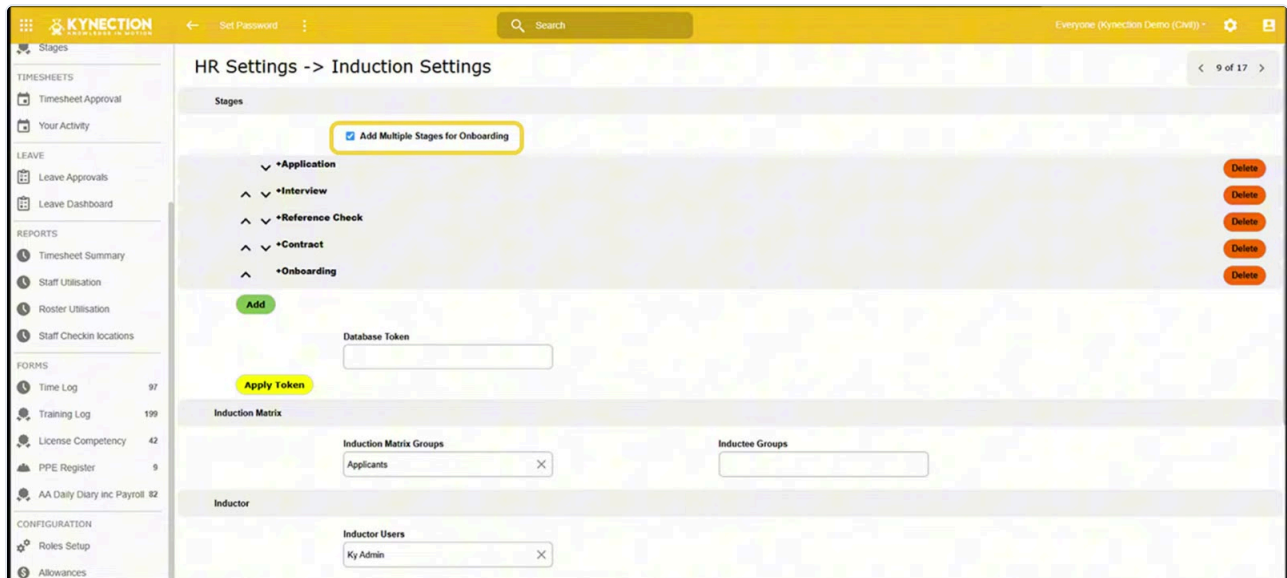
Check the PPE register

The **PPE Register** tracks equipment issued to employees: helmet, jacket, gloves, pants, boots and safety glasses. Items can carry expiry dates for timely replacement.

CHAPTER 02 • STEP 3 OF 3

Configure roles and induction

Before you can attach training to a role, onboarding has to be set up to accept multiple stages.

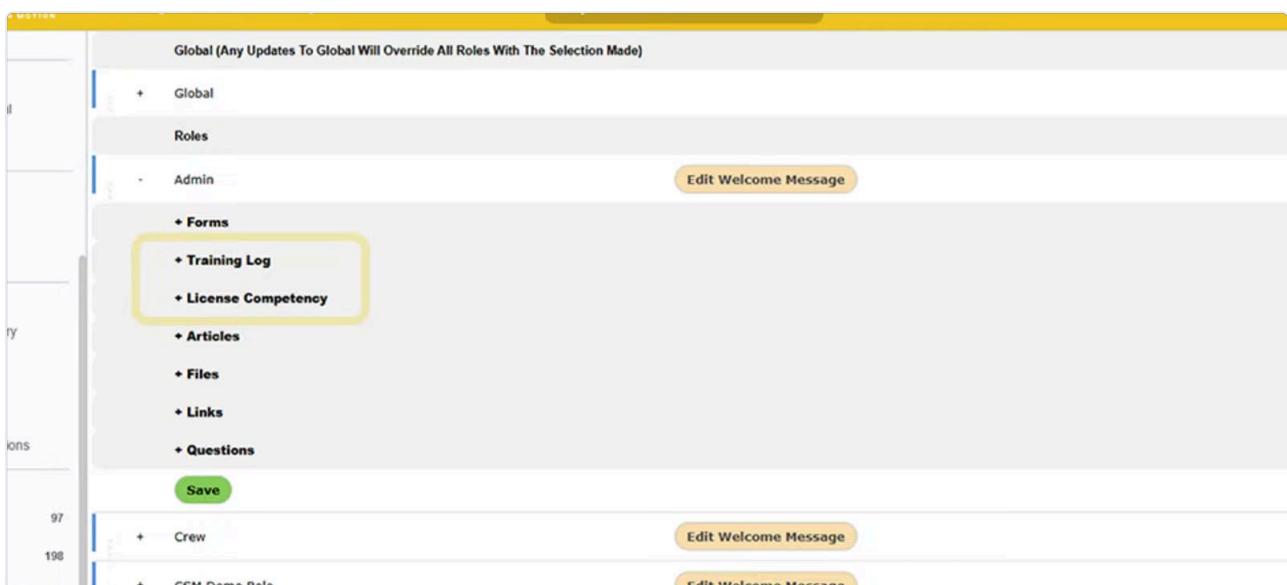


STEP 1 • 01:20 IN THE VIDEO

Set up induction stages

In **HR Settings > Induction Settings**, enable **Add Multiple Stages for Onboarding**. The stages then run Application, Welcome, Reference Check, Contract and Onboarding.

CHAPTER 03 • STEP 1 OF 2



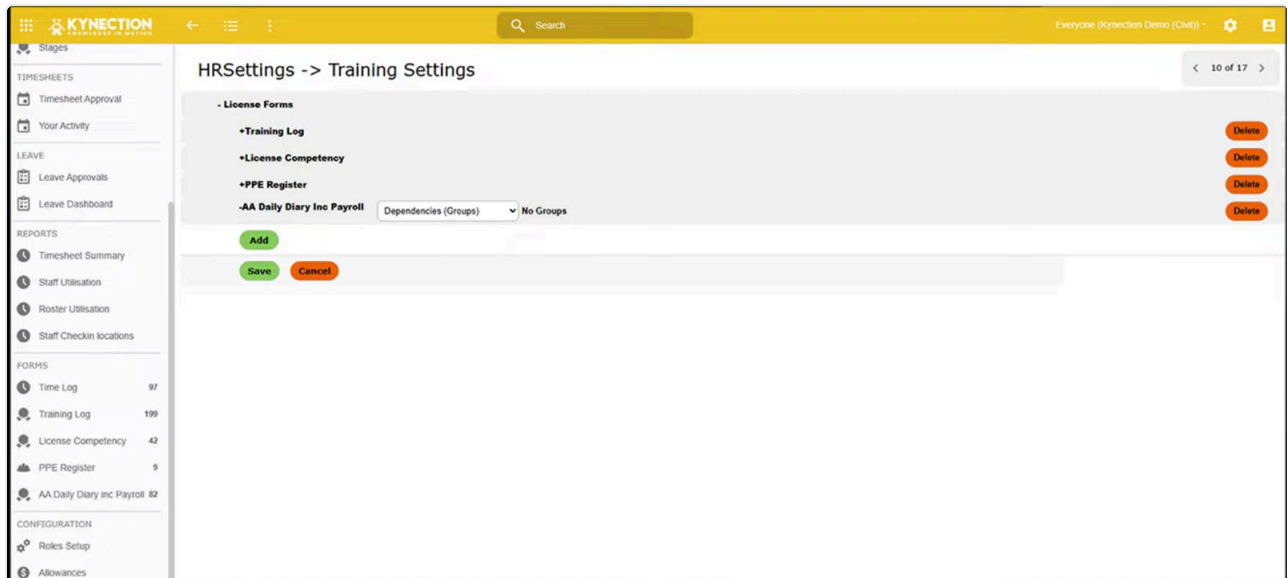
STEP 2 • 01:45 IN THE VIDEO

Attach training to a role

In role setup, use the plus sign beside a role to add a training log or licence competency. Expanding it lists the predefined qualifications, and the checkbox on the right marks a training as optional rather than required. Note that global updates override all roles.

Set up training settings

Training settings define the forms, the fields they read, and the certificates behind the matrix.

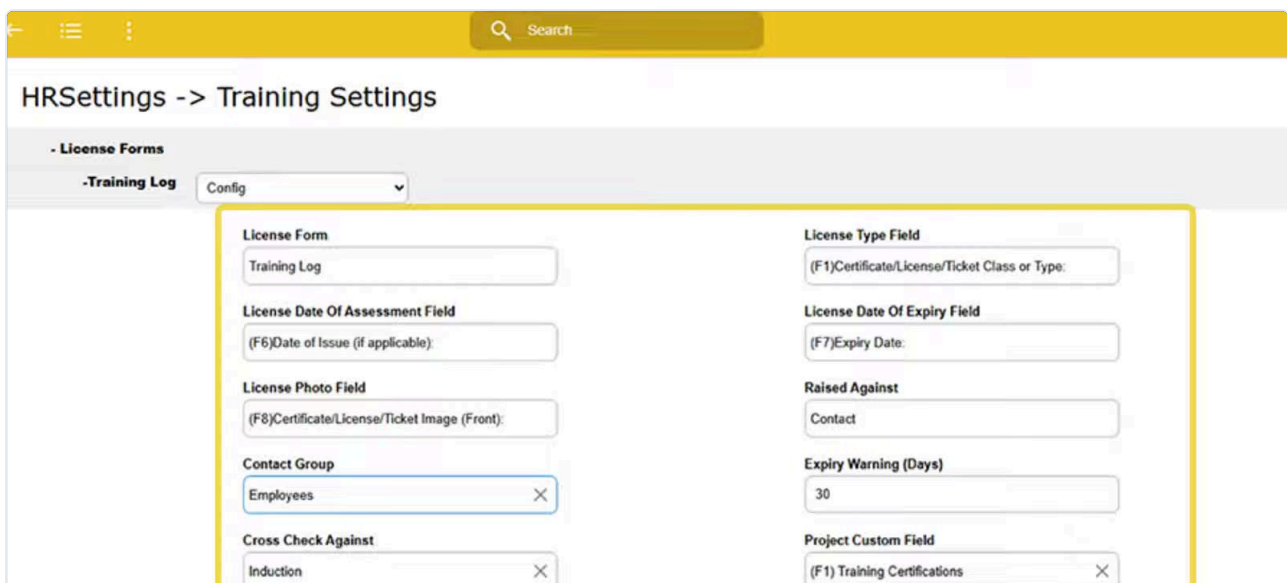


STEP 1 • 02:10 IN THE VIDEO

Open training settings

HR Settings > Training Settings holds licence forms, training logs, licence competency, the PPE register and the daily diary, each configured the same way.

CHAPTER 04 • STEP 1 OF 3



STEP 2 • 02:35 IN THE VIDEO

Configure the training log

The config option sets the licence form, date of assessment field, photo field, contact group and cross-check, alongside the licence type field, date of expiry field, what it is raised against and the **Expiry Warning (Days)**.

CHAPTER 04 • STEP 2 OF 3

Set up training settings

The screenshot displays a grid of training modules. The first row contains six modules: 'Work at Heights', 'Occupational Health and Sa', 'Lift Truck', 'Advanced Resuscitation', 'Colinvest', and 'Asbestos Removal A'. The second row contains 'Dangerous Goods', 'Test Training', and a large empty box with a plus sign for adding new modules. Each module card has fields for Name, Header, Duration (Year, Mon), and a Group dropdown, along with a Delete button.

STEP 3 • 03:00 IN THE VIDEO

Create the certificates

The certificates menu stores the qualifications listed in the matrix. Add one with the plus sign, then give it a name identical to the training log form, a duration for how long it stays valid, and a group.

Build certificate dependencies

Grouping certificates lets one depend on another, and collapses them into a single matrix column.

HRSettings -> Training Settings

- License Forms

- Training Log Dependencies (Groups) Test ☒ Combine In Matrix Remove Group

Dependent	Test Training	Test Training 2
Test Training	☒	☐
Test Training 2	☐	☒

+ License Competency

+ PPE Register

+ AA Daily Diary Inc Payroll

Add

Save Cancel

STEP 1 • 03:25 IN THE VIDEO

Set the dependencies

Dependencies relate to the groups created against certificates. Enter the group name, then tick **Combine in Matrix** to show the group as one column rather than several.

CHAPTER 05 • STEP 1 OF 2

HRSettings -> Training Settings

- License Forms

- Training Log Dependencies (Groups) Test ☒ Combine In Matrix Remove Group

Dependent	Test Training	Test Training 2
Test Training	☒	☐
Test Training 2	☐	☒

+ License Competency

+ PPE Register

+ AA Daily Diary Inc Payroll

Add

Save Cancel

STEP 2 • 03:45 IN THE VIDEO

Link one certificate to another

Click the blue cross to change it to a green tick where one certificate depends on another, for example level four requiring level three. Save before exiting.

CHAPTER 05 • STEP 2 OF 2