

SOLABS QM10: Best Practices when Considering Including Multiple Training Activities in a Curriculum set for Recurrence Based on Document Revision

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Purpose of this Guide

This document provides considerations for determining the best way to organize Curriculums that have more than one Training Activity, one of which is a Curriculum Document set for a Recurrence based on Document Revision.

When a Curriculum is set for a Recurrence based on revision of the Curriculum Document, all Training Activities within that Curriculum are automatically versioned, even if some are intentionally set as “No Assignment” after Recurrence. The previous versions of all Training Activities are also automatically closed.

Training Compliance percentages can be negatively impacted by “Unassigned” Training Activities, even where the choice not to assign them was intentional. Therefore, some considerations need to be made before grouping multiple Training Activities into one Curriculum that is set for a Recurrence on the Curriculum Document.

Scenario 1 – All Training Activities in my Curriculum need to be assigned with every revision of the Curriculum Document

This is the most straightforward situation. The **Assignment After Creation** section is used to decide what you would like to happen upon revision of the Curriculum Document.

If all Training Activities need to recur when the linked Curriculum Document is revised, set them all to one of the three “Assign” options – based on profile, previous assignments or previously trained, whichever you prefer.

Recurrence	
Recurrence: Document revision	
Assignment After Creation:	
<input type="radio"/> No assignment	Status After Creation:
<input checked="" type="radio"/> Assign based on profile	<input checked="" type="radio"/> Not Started
<input type="radio"/> Assign based on previous assignments	<input type="radio"/> Active
<input type="radio"/> Assign based on previously trained	

When it is desired to measure Training Compliance for your users, always use the **Add Activity to Profile** option after creating a new Training Activity and then Assign End Users by filtering by those Profiles (Function Roles). For the Recurrence settings, use the **Assign based on profile** (Function Role) option.

It is also help to set **Status After Creation** to “**Not Started**” so that you can change settings after the Training Activities are recreated, even if it is just to set Due Dates for your assigned users through **Schedule Users Activity**.

What if I need to remove one of the Training Activities in the Curriculum?

If you have linked multiple Training Activities within a Curriculum set for Recurrence Based on Document Revision and then decide that one of the non-document Training Activities does not need to recur each time the document is revised, you can Modify that Training Activity to **change the Status to Closed**. However, this must be done **BEFORE the next revision of the Curriculum Document**.

Training Activity Details	
* Name:	
GDP Validation Program	
Category:	Status:
Classroom Training	<input type="radio"/> Not Started
	<input type="radio"/> Active
	<input type="radio"/> On Hold
	<input checked="" type="radio"/> Closed

CAUTION: If there are Assigned and Untrained users when the Training Activity is put to a Status of “Closed”, those activities will show as Not Trained on some Training Compliance Reports. The Training Activity will clearly be identified as “Closed” but can result in questions upon review of such reports. If you know the Curriculum Document will soon be revised, check for Untrained Users on all related Training Activities and ask them to complete the assignments.

What should I do if I’ve decided that a Training Activity *is* related to the document but does not need to recur every time the document is revised?

Whether you decide this up front – and therefore don’t include it in the same Curriculum as the document – or you identify this after the fact and remove it from the Curriculum, see Scenario 2.

Scenario 2: I have Training Activities Related to a Curriculum Document but don't assign them every time the document is revised

What if I have Classroom Training or On-the-Job Training for new personnel that is intended as a one-time-only assignment?

In this case, the assignees may be the same but the frequency of assignment is different.

If you may need future users to complete one-time-only Training Activities, they should be in a separate Curriculum from the related document. They can be linked to the same Profiles (Function Roles) but be set up with No Recurrence and assigned as needed, as new people come into the organization.

If you occasionally need to make modifications to this Training Activity, you can choose to manually Modify it for subsequent assignments.

What everyone needs to read the SOP for awareness but some also need related Classroom Training or On-the-Job Training due to the nature of their job?

In this case the assignees are different between the related Training Activities.

If some users need complete more Training Activities than others, those Training Activities should also be in a separate Curriculum from the related document. They can then be linked to only those Profiles (Function Roles) that need them. You may need to consider creating additional Function Roles in this situation.

Example: Everyone in GMP Job Roles needs to know what to do if they identify a deviation from an approved process but only certain people are responsible for then managing those deviation investigations.

- The Training Activity for the SOP can be set up in a Curriculum with Recurrence Based on Document Revision and linked to Function Roles for everyone's Job Title.
- The Training Activity for Managing Deviation Investigations can be set up in a Curriculum with No Recurrence and linked to a Function Role such as FCT_Managing Deviation Investigations. That Function Role will only be assigned to users who are actually involved in managing and approving the related investigation.

If you occasionally need to make modifications to this Training Activity, you can choose to manually Modify it for subsequent assignments.

If I have Training Activities associated with the same SOP but they are in separate Curricula, how can I be sure my Training Administrators are aware of this?

Use similar naming conventions and use the Description section of both the Curriculum and the Training Activities help identify the relationships.

For Example:

- Curriculum 1 is named SOP-QA-027, Deviation Reporting & Management and includes only the SOP
- Curriculum 2 is named SOP-QA-027, Managing Deviation Investigations and includes classroom and/or OJT training for deviation investigators and approvers