

Revision:

20 Jan 2020

Purpose:

To document the requirements of a software application that will track and report for employee training.

Background:

The Company has been using Excel to track the training requirements for employees. There is a matrix created for each functional department.

The challenges of this system:

- The matrices are not consistent with how the information is tracked.
- When employees leave or join the company the matrix is not always updated.
- The excel file is used to document the training requirements for employees but not clear based on functional role.
- Employees may be trained across more than one department and it is unclear which matrix should be updated.
- The ECO and Training procedures allow the ECO approvers to be considered training but the training matrix may not always be updated.

User requirements matrix

The following matrix will be used to capture the requirements of the software.

The priority rating of these requirements is defined:

- 1- Must be part of the solution
- 2- Requirement would be great to have but not necessarily required in making the final decision



Requirements

Number	Element	Requirement	Priority	Additional Notes
1	Admin	The Admin must be able to setup new employees and assign required training based on function and departments, transfer employees when they change department.	1	
2	Queries	Need to know who is required to have training based on the document change	1	
3	Reports	The training requirements by functional roles	1	
4	Reports	Complete training by procedure, department or employee	1	
5	Software	Software must be part of a modular QMS system so that future expansion is possible	2	
6	System	Software must operate on Windows 10 OS	1	
7	System	Software must be a cloud-based system	1	
8	System	Software must be Part 11 Compliant for electronic signature	1	
9	System	Software must be easy to access via Smart Phone	2	
10	System	Software must be able to send email notifications through Outlook	1	
11	System	Notification of training ahead of required completion date	1	
12	System	Escalation to Supervisor ahead of required completion date as well as overdue training	1	
13	System	The software must have the ability to setup users based on roles and privileges i.e. Supervisors must be able to add/remove employees, assign training requirements, complete training for employees that don't have access to the system.	1	
14	System	The system must be able to identify temporary and full time employees	1	
15	System	The system must be able to track all types of training i.e. QMS, safety	2	
16	System	The licensing should allow for the flexibility of users	1	
17	System	Software must not exceed \$5,000 for initial cost and not more than \$500 for annual licenses.	2	
18	System	Hard copy records can be attached to the training completion	2	
19	User	Employees must be able to access their training records and complete training	1	



Number	Element	Requirement	Priority	Additional Notes
20	User	Supervisors must have the ability to complete training for employees for group training	1	
	User	Employees that approve ECOs must be able to view their training records	1	

End of Document/Jim Shore