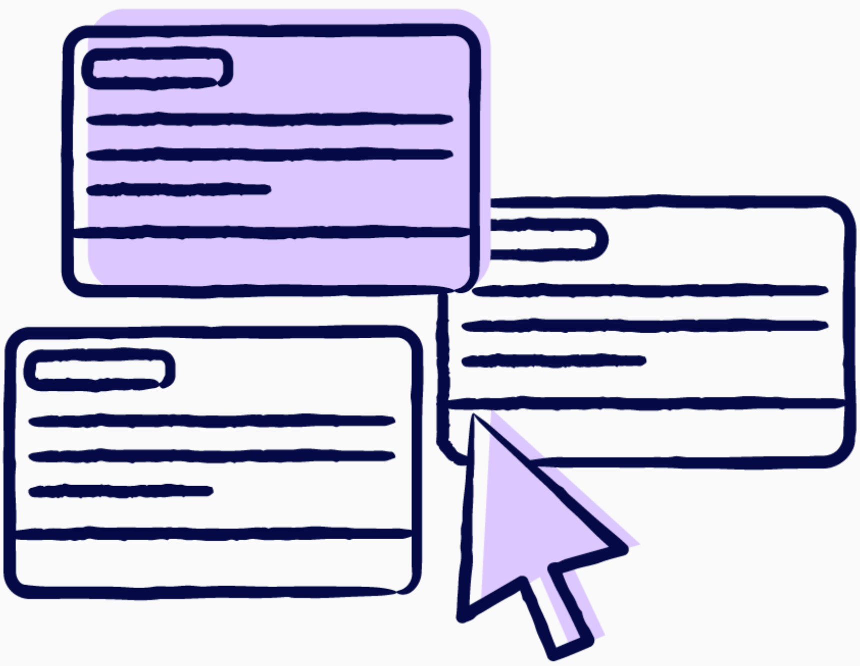
Scilife

How to build your training matrix in Scilife

Implementing a structured training setup in Scilife is about more than compliance. It's about ensuring your team is properly trained in the processes they carry out daily. This guide walks you through how to build your training matrix using Scilife's Training module, step-by-step.



1. Prepare Your Documents

Once you have your documentation created in Scilife's Document Control tool, you'll need to make sure your employees are trained on it.

The most effective way to structure your trainings is by grouping documents according to a clear logic — such as by process, department, or certification (e.g. ISO, GxP). Each training should bring together the documents relevant to that topic or area. When appropriate, you can also include additional materials like tasks, external links, or assessments — though these are entirely optional.

A document can appear in more than one training. For example, it might be included in a high-level overview that only lists procedures, and also in a more detailed training that combines procedures with work instructions and other materials.

To support this structure, you can use **Tags**. Tags in Scilife are specifically designed to help organize your content. You can create tags for:

- **Departments**
- **Processes**
- **Certifications** (e.g. ISO 9001, ISO 13485, GxP)
- **Any other operational grouping** relevant to your organization

These tags allow you to filter and group documents when building your trainings. For example, you can create a training that includes all documents tagged to a specific department or tied to a specific certification requirement.

In many implementations, we see that **QA or HR teams** have a good overview of all the general trainings employees need in order to meet company-wide compliance requirements, including trainings tied to external standards like **GMP** or **ISO**. However, when it comes to the operational, day-to-day trainings that ensure people are actually capable of doing their job, **department managers** usually have the most accurate and updated view.

Scilife's structure makes it easy for the teams responsible for training implementation to **involve department and process managers early in the setup phase**, allowing for a more complete and operationally relevant training structure. These managers are configured in Scilife as Reporting Managers.

2. Understand Who Needs to Be Trained

With your process-based trainings defined, the next step is identifying which employees need to be trained on what.

To help with this, we've prepared a training matrix spreadsheet with several tabs, which you'll use to collect and organize all relevant data before setting up the trainings in the system.

This step also benefits from shared ownership. While QA or HR may define the general and compliance-related trainings across the company, it is often **department heads, line managers, or process owners** who can best determine what training is essential for specific teams to operate effectively. Because Scilife supports distributed setup, it's easy to involve these managers in defining who needs what training — based on roles, functions, or processes.

3. Use the Training Matrix Spreadsheet

The spreadsheet you'll use to design and configure your training matrix includes **5 tabs** in total:

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1. **Instructions tab**

   This tab provides an overview and explanation of each of the other tabs. It also includes a link to this guide for reference.

2. **Documents tab**

   Add all your documents by exporting them from the Document listing in Scilife. These are the documents you'll use to build your trainings.

3. **Users tab**

   Add your user data by exporting from the User listing in Scilife. This allows you to identify who needs to be assigned to which training.

4. **User functions tab**

   This is for planning which user functions you want to create. It's a proposal space — these functions haven't yet been created in the system, and this tab helps you organize them before doing so.

5. **Trainings tab**

   Here you propose the actual trainings — organized by process — including the relevant documents and, if needed, tasks, assessments, or links.

Documents Tab

To complete this tab, go to the Document listing page in Scilife and adjust your column view so that only the following fields are displayed:

- Document ID
- Document name
- Version
- Document type
- Status
- Groups
- Tags
- Published date
- Products & services
- Contacts

Also include any **custom fields** you've created that may help organize trainings (e.g. process, business unit, region, etc.).

Once the right columns are selected, use the **"Current columns only"** export option. This will export just the visible fields to an Excel file (.xlsx). After exporting, paste the resulting list directly into the **Documents tab** of your training matrix spreadsheet.

Why these fields matter:

- **Tags** (e.g. department, process) allow you to organize documents meaningfully and filter them when defining trainings.
- **Document type** ensures you include the right categories such as policies, manuals, SOPs, work instructions, etc.
- **Contacts** and **Products & services** help group documents that relate to a specific customer, vendor, supplier, manufacturer, or product. For example, you might build a training that includes all documents linked to a product you manufacture for a specific client.
- The reason for including **tags, document types, contacts**, and products is to enable effective filtering in the spreadsheet, which allows you to group documents easily by relevance when setting up trainings.
- Including **status, version**, and **published date** helps you understand where each document stands in the approval workflow. A document can be added to a training regardless of its status, but it **will not appear to trainees for read and understood until it is in Approved not Published status**.

- This insight will help you identify which documents still need to reach full approval before the training becomes effective. For instance, it would not be ideal to make approved work instructions available in a training while the related procedure is still in draft—this could create confusion or gaps in understanding.

Users Tab

To complete this tab, go to the **User listing page** in Scilife and adjust your column view so that only the following fields are displayed:

- Name
- Groups
- Permission role
- Email
- Reporting Manager
- Allowed to be QA person
- User functions
- Modules
- Job title

If you're using the Competences module, you can also include additional CV fields that help refine training configurations.

Once the correct fields are visible, use the **"Current columns only"** export option. This will generate an Excel (.xlsx) file with only the selected columns. After exporting, **copy and paste** the contents into the **Users tab** of your training matrix spreadsheet.

Why these fields matter:

- The **Reporting Manager** field allows you to filter users by team and involve each Reporting Manager in training assignments. This enables distributed responsibility, where each team leader can take ownership of the training needs of their direct reports.
- **Allowed to be QA person** identifies users who need dedicated QA trainings across different Scilife tools.

- **Modules** help you plan ahead. While a user may currently work with only one module, their access often expands. Keeping this field visible allows you to anticipate training needs across modules.
- **Job title** helps clarify which user functions should be assigned to each employee.
- Together, these fields allow for a clear overview of who each person is, what access and responsibilities they hold, and how their training path should be structured.

User Functions Tab

This tab is where you define which User Functions you'd like to create in Scilife. These don't yet exist in the system — this is your planning space. Share this tab with Reporting Managers or department heads so they can define the user functions needed for their teams.

A User can be assigned to multiple user functions, and likewise, a Training can be assigned to multiple user functions. Trainings are always assigned by a combination of Groups and User Functions.

For example: if you have one group for Spain, one for Portugal, and one for Italy — and users across all of them share the user function "GMP" — you could create a Training assigned to the Italy group and the GMP user function. In that case, only users who belong to the Italy group and have the GMP user function will be assigned the training.

This flexible structure allows you to be either broad or highly specific in how trainings are assigned. For example, a single user could simultaneously be assigned to:

- A general company-wide user function like **"Employee"**
- A role-specific function like **"QA"**
- A certification-specific function like **"GMP"** or **"ISO 13485"**

This layered assignment ensures that each user receives only the trainings that apply to their actual responsibilities, without unnecessary duplication.

Example for a QA Department:

You might define the following user functions:

- **QA** (for general quality-related content)
- **QA – GMP** (for employees involved in GMP-regulated processes)
- **QA – ISO 9001** (for teams working under ISO 9001 compliance)

- **QA – ISO 13485** (specific to medical device compliance)
- **QA – Auditing** (for those responsible for internal or supplier audits)

This level of granularity helps ensure that your trainings align with regulatory needs while still being manageable and adaptable.

Best practices:

- Create a basic function called **"Employee"**. Assign it to all users for general trainings.
- If you skip this, you'll need to manually update every training whenever a new user function is added—an error-prone task.

Trainings Tab

This tab is where you define the actual trainings that will be created in Scilife. Each training typically corresponds to a process and includes all the relevant documents — and optionally tasks, assessments, or external links — needed to fully train users on that process.

The Trainings Tab is meant for training proposals. QA, HR, or Reporting Managers will use it to propose the trainings they believe should be created. Typically, QA or HR will share the training matrix spreadsheet with multiple stakeholders across the company — including department managers, process owners, and team leads. This tab is where those stakeholders document which trainings are relevant for the process or scope they're responsible for.

At this point, you've organized your documents and defined the user functions. In this tab, you'll use that work to create clear and structured training proposals.

The key concept here is straightforward:

You group your documents into **trainings**, and you group your users into **user functions**.

You then assign each training to one or more user functions. This way, the right users receive the right trainings based on their functional role.

Creating your training Step-by-step:

1. Filter your documents.

Go to the **Documents Tab** and filter the list using tags, contacts, products, or any custom fields you've included. For example, you can filter by department tag (e.g. "Production"), process name, or certification area.

2. Group by process.

Identify which documents belong together logically as part of a process. These will form the basis of your training. For example, all documents related to "Cleaning & Sanitization" could be grouped under one training.

3. Paste into the Trainings Tab.

Once you've identified the relevant documents, copy and paste them into the **Trainings Tab**. Include the document ID and name, and specify the **training material type** (usually "Document").

4. Add optional training content.

If needed, add:

- **External links** (e.g. links to third-party videos or resources)
- **Assessments:** Assessments must be created in Scilife. At this stage, some customers may choose to leave assessments out and add them later. Others may have already created assessments per process. If so, you can list the corresponding assessments here, including their IDs.
  If you already have several assessments created in the system, it may be helpful to add an **Assessments Tab** to the spreadsheet. There, you can paste a list of exported assessments from the system to keep an overview and make linking easier.
- **Tasks** (to validate practical skills)

5. Flagging New Items for Creation

For any item that does not yet exist in the system, you can write **"NEW"** in the ID column to flag it as something that still needs to be created.

6. Set training timeframes.

There are two optional but highly recommended fields you can configure:

- **Maximum training period (days):** This sets a due date for the training — i.e., how long a user has to complete the training from the moment they are assigned. If left blank, the training will not have a due date. This value can be defined by QA or HR centrally, or left to the individual proposing the training.
- **Retraining after (days):** This defines the recurrence for full retraining. It is especially relevant for areas like GMP, where yearly retraining is often required to demonstrate ongoing compliance. When defined, users will be required to repeat the full training at the interval set here

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Important note: Even without a retraining cycle, any time a document within a training is updated, users will automatically be prompted to retrain on just that specific document. However, the retraining after (days) setting is what ensures that users complete the full training again on a recurring basis.

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7. Organize content.

You may choose to sort the documents by order of importance or reading sequence. The order in the spreadsheet can help define the user experience within the training.

Ideally, you'll want your trainees to first read the process-level procedures to understand the full context, and only then move on to the detailed work instructions that support the execution of that process.

Final tips:

- Trainings are assigned using a combination of **Groups** and **User Functions**. This ensures that the right users are assigned to the training by virtue of the group(s) to which they belong and the user function(s) they have been assigned.
- Be sure to clearly title each training based on the process it covers. This helps users immediately understand the scope and content of each training.

- **Training proposals should be prepared by the Reporting Manager, QA, or HR, and then reviewed by the Training Coordinator(s), who are responsible for creating the training in Scilife.**
  As part of this setup, you may assign:
  - **Training Supervisors**, who must approve the training once the user completes it.
  - **Training Task Supervisors**, who must approve individual training tasks marked as completed by the user.
- These roles should be assigned thoughtfully. If used without clear necessity, they can introduce bottlenecks into your training process. For example:
  - **Training Supervisors** will need to reapprove trainings each time documents are updated and users are retrained. This can quickly become an operational burden.
  - **Training Task Supervisors** are useful when validation is needed for hands-on training — for example, confirming that a task has been performed correctly or that a user was present during classroom instruction.

4. Final Setup and Go-Live

Once you've gathered the completed spreadsheets from Reporting Managers, department heads, and others involved in defining the training needs, it's time to move into execution.

As the **Training Coordinator**, your role is to **review, create**, and **launch** the training structure in Scilife. But before you create anything, take the time to thoroughly review all the spreadsheets you've received.

- If any training, document grouping, or user function proposal seems unclear or incomplete, contact the person who submitted it and ask for clarification or revision. It's far more efficient to fix issues now than later.

Once everything has been reviewed and validated, follow these steps in order:

1. **Create the User Functions** in the system — using the consolidated proposals from all spreadsheets.
2. **Create the Trainings** in the system — based on what's been defined and approved in the Trainings Tab of each spreadsheet. Be sure to include all training content (documents, links, assessments, and tasks, where relevant).
3. **Assign the User Functions to Users** — this is what activates the training assignments.

Important: Timing and Start Dates

The training start date per user is determined by one of two things:

- If a training start date was **predefined** in the training (and it's a date in the future), that date will be used.
- If no future start date is set, the training start date will be the **moment the user function is assigned** to both the user and the training.

This is why assigning user functions is the last step in the process. Once user functions are linked to both the training and the user, the training becomes active for the user.

Final Checks in the System

Once setup is complete, validate the configuration within Scilife using the system views:

- **User Listing:** You should be able to see each user's assigned user functions and their training progress.
- **Document Listing:** You'll be able to see which documents are included in which trainings.

  To do this, make sure to add the **"Used in Trainings"** field to the listing view. This will display all trainings where a document is currently used.

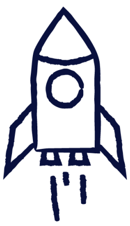
  Remember, a document can appear in multiple trainings, so double-check that all important documents are linked appropriately.

  As a final quality check, filter the Document Listing page using the relevant fields (e.g., **Document type** and **Tags**) to identify documents that should be included in trainings but aren't yet assigned.

  For example, you may want to ensure that all **Procedures** related to your **ISO certification** are part of a training. To do this:

  - Filter by Document type = **Procedure**
  - Filter by Tag = **ISO**
  - Check the **Used in Trainings** column

- If this column is empty for any document in the filtered list, you'll know that these still need to be added to a training.



Moving Forward & Keeping Your Training Matrix Up to Date

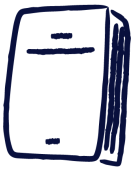
Once your initial training setup is complete and live in Scilife, maintaining it becomes significantly easier. The hard part — aligning documents, user functions, and trainings — is done. From here, updates can follow a simpler, well-defined process.

Each time a new document is created or an existing one is updated, it's important to ensure that it is linked to the appropriate trainings. The good news is that this can be managed directly during the document approval process.

Typically, the last person in the document approval workflow is someone from QA — who also acts as the **Training Coordinator**. When approving a document, this user has the ability to immediately assign the document to one or more existing trainings. This makes it easy to keep training content current without needing to revisit the full training matrix.

To keep your training matrix effective over time:

- **Review trainings regularly**, especially after structural or regulatory changes.
- **Update user functions** when teams grow, roles shift, or responsibilities evolve.
- **Maintain document-tagging discipline** to ensure future documents are easy to locate and group for training purposes.
- **Use Scilife's reporting capabilities** to monitor progress and identify gaps across users, documents, and trainings.



Additional Resources & Next Steps

To get the most out of your setup and ensure long-term success with the Scilife Trainings tool, we strongly recommend that Training Coordinators and key team members complete the dedicated certification in the Scilife Academy:

Training Coordinator Certification: Trainings Tool
Scilife Academy - Certification Path

This certification covers both the technical and strategic aspects of the module, ensuring you're fully equipped to manage and evolve your training structure.

In addition, we encourage you to consult the following articles from the Scilife Knowledge Base for deeper insights and specific how-to guidance:

Recommended Articles:

- **Defining User Functions**
  Understand how to group users based on training needs.

- **How do I create a Training**
  Step-by-step guidance to create a training in Scilife.

- **Roles in a Training: Training Coordinator, Training Supervisor, and Task Supervisor**
  Clarifies responsibilities for each role in the training workflow.

- **Can I change a User's User Functions within the Training Module**
  Learn how to reassign user functions if training requirements change.

- **Best Practices for Training Creation**
  Practical tips for structuring and maintaining effective trainings.

- **What happens to a Training when I update the Training Materials**
  Understand how training updates behave after a document is modified.

- **Why has the Training not been Assigned to any Users**
  Troubleshoot missing training assignments.

- **How can I see a training start date**
  Learn how training assignment timing works.

By embedding this process into your ongoing document control and QA workflows, your training matrix stays alive — continuously aligned with how your organization actually works.

Scilife