

How To Guide...

Training & Skills Screens

**Wiztec Business Suite
& WizHR 5**

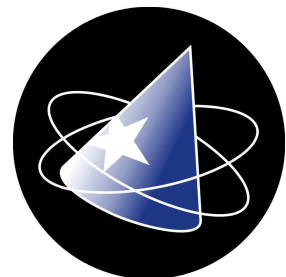


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Training

Training Courses



Topic Headings

- [Purpose](#)
- [Location](#)
- [Adding a new company course](#)
- [Editing an existing company course](#)
- [Deleting a company course](#)

Purpose

The Company Training screen allows you to assign Training courses to employees based on their job titles. You can enter a course description (BSc Information Technology), subjects to be undertaken (e.g. Programming, MIS, IT Theory), job titles that require the course, etc.

The Company Training screen is linked to each employees Training Planner. Once the details of a course have been entered into the Company Training screen, you can add this course to an individual employees "Training Planning" screen by clicking on the Courses button (Employee > Training Planner)



Location

1. Click on **Company** (menu bar)
2. Click on **Training Courses**

Add a new Company Training Course

1. Click on **Add** (sub screen toolbar)
2. Click in the text box to the right of **Course Description** and key in the title of the course (e.g. IPD Human Resources)
3. Click on the **Plus** button underneath **Subjects in Course**
4. The **Training Subject** dialog box appears
5. Click on the pick list button to the right of **Subject**, select the Subject title and click on **OK**
6. Click on the pick list button to the right of **Provider**, select a company and click on **OK**
7. Click on the pick list button to the right of **Location**, select a training location and click on **OK**
8. Click in the text box to the right of **Duration** and key in the number of days the course will be completed in

9. Click in the text box to the right of **Cost** and key in how much it will cost the company to run this course/send employees on this course
10. Click on the drop down arrow to the right of **Currency** and select the currency that this amount specified in the Cost field will be measured in
11. Click in the text box to the right of **Completion Period** (e.g. Course must be completed in 365 days from "start of course")
12. Click in the text box to the right of **Expiry Period** and key in the number of days that the skills acquired in the course will be terminated. Click on **OK**
13. You can add as many subjects as you wish
14. Click on the **Plus** button underneath **Jobs Requiring this Course**. The Jobs Requiring this Course dialog box appears. Click on the "pick list" button to the right of **Job Title**. Select a Job Title (this pick list is linked to the job title field in the Employee Details screen). Click on **OK**
15. You may add as many job titles as is applicable
16. Click in the **Comments** text box to key in any miscellaneous comments which relate to the provision, uptake, etc of this course
17. Click on **Save**

Edit an Existing Company Training Course

1. Open the **Company Training Screen**
2. Click on the **List** tab
3. Double click on the **Course Description** you want to edit
4. This will bring you back to the **Details** tab
5. Click on **Edit** (sub screen Toolbar)
6. To Edit the **Subject** list:
 - Click on the edit button below the Subjects in Course List
 - The Training Subject dialog box appears
 - Edit fields as required
 - Click on OK when finished editing
7. To Edit the **Job Title** list:
 - Click on the edit button below the Jobs Requiring this Course
 - The Job Requiring this Course dialog box appears
 - Edit the job title as required
 - Click on OK when you're finished editing
8. Click on **Save**

Deleting a Company Training Course

1. Open the **Company Training Screen**
2. Click on the **List** tab
3. Double click Company Training record you want to delete
4. This will bring you back to the Details tab

5. Click on **Delete** (sub screen toolbar)
6. A message box appears "Are you sure you want to delete this record"
7. Click on **Yes**

Training Planner



Topic Headings

- [Purpose](#)
- [Location](#)
- [Adding a Training Course to an employees Training Planner](#)
- [Marking a Training Course as completed](#)

Additional

- [Field Breakdown](#)

Purpose

The Training Planner allows you to track and record upcoming training for employees. If a training course has not been completed, the "Complete By" field becomes red and the employee is added to the [Training Overdue](#) course.

It is possible to enter as many training records as is required.

Location

1. Click on **Employee** (*menu bar*)
2. Click on **Employment**
3. Click on **Training Planner**

alternatively

This screen is not visible as part of the default installation of WBS. However, it is possible to add this screen using the Toolbar Management screen. Follow the instructions below to add the Training Planner screen to your user profile.

- Click on **Preferences** (*menu bar*)
- Select **Toolbar Management**
- Select **Employment** (*left hand side of the dialog box*)
- Under **Components**, check the **Training Planner** check box
- Under **Components**, highlight **Training Planner**
- Click on the **Change Toolbar** button (*right hand side of the dialog box*)
- Select **WizHR** from the **Please Choose a Menu Bar** drop down list
- Click on **OK**
- Click on **Close**

How do I Add a Training Course to an employees Training Planner?

1. Open the **Training Planner** screen
2. Use the **Employee Navigation Toolbar** to locate the employee you want to add a training course for
3. Click on the **Add** button (*sub screen toolbar*)
4. Use the **Complete by** field to indicate the latest date the employee must have the course completed by
5. Use the **Course** drop down list or pick list to select a course (*e.g. First Aid*)



Note:

The Course drop down list is populated from the Company Training Courses screen. The Course pick list should only be used for ad hoc training courses (such as conferences and seminars). All other courses (e.g. Manual Handling, First Aid, etc.) should be entered into the Company Training Courses screen.

6. Select a topic/subject from the **Subject** drop down list or pick list



Note:

It is advisable that you use the Subject drop down list if you used the Courses drop down list in the previous field

7. Choose a trainer/provider from the **Provider** pick list (e.g. Wiztec Training Centre)
8. Choose a **location**
9. Use the **Scheduled for** field, if the users training has been scheduled for a date earlier/later than that indicated in the Complete by field above
10. Key in a **Duration** (in days)
11. Key in an **Expiry Period**, if applicable.



Note:

This expiry period is linked to a diary reminder. When the course has expired, you will be reminded to place the employee on a refresher course

12. Key in the **Cost** of the course, for you, the employer
13. Key in the **Employees Contribution**, if applicable
14. Select **Grant Aided**, if this course qualifies for a grant funding
15. The **Currency** field will default to EUR. If the course/seminar is being run or paid for outside of the Euro Zone, select the appropriate currency.

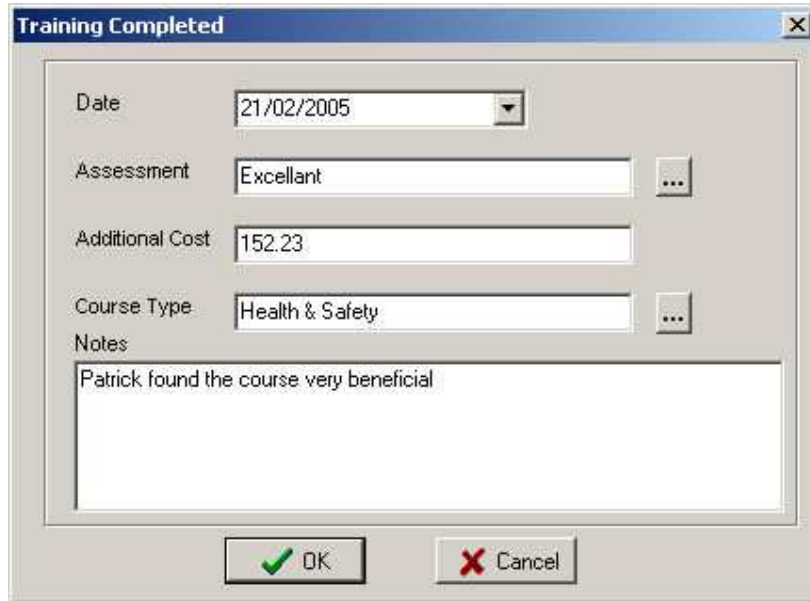


Note:

The Currency drop down list is populated from the Company Exchange Rates screen.

How do I mark a course a completed?

1. Open the **Training Planner** screen
2. Use the **Employee Navigation** toolbar to locate the employee you wish to work with
3. Use the **Record Navigation** tool bar or the List tab to locate the completed course
4. Click on the **Complete** button (*sub screen toolbar*)
5. The following dialog box appears:-



The screenshot shows a dialog box titled "Training Completed". It has a standard Windows-style title bar with a close button (X). The dialog contains the following fields and controls:

- Date:** A dropdown menu showing "21/02/2005".
- Assessment:** A text box containing "Excellent" and a pick list icon (three dots).
- Additional Cost:** A text box containing "152.23".
- Course Type:** A text box containing "Health & Safety" and a pick list icon (three dots).
- Notes:** A large text area containing the text "Patrick found the course very beneficial".
- Buttons:** "OK" (with a green checkmark icon) and "Cancel" (with a red X icon) buttons at the bottom.

6. Select the **Date** the course was completed on
7. Select the employees evaluation of the course from the **Assessment** pick list
8. Key in any **Additional Cost** which was incurred (e.g. subsistence)
9. Choose a general course category from the **Course Type** pick list (e.g. Health & Safety)

 **Note:**

This pick list should be general course categories such as Health & Safety, Professional Development, Conference/Seminar, etc. Using these categorisations will make it easier to report on training carried out in the organization.

10. Key in any additional comments into the **Notes** field
11. Click on **OK**
12. The course is removed from the Training Planner and automatically transferred to the employees [Training History](#)



Frequently Asked Questions:

- How do I insert a training course for a group of employees?

WBS allows the user to add one training course to multiple employees. For example, all employees in the Administration Department are required to complete a refresher course in Microsoft Word by August 2002. Instead of adding a separate record to each employees Training Planner, use Global Up to add the same training record to all employees in Administration at the same time.

1. Create a **new Group** (e.g. called Administration) and add all employees from Administration to that group
2. Open the **Training Planner Screen**
3. Click on **Global Up**
4. The Global Update screen appears
5. Click on **Update Employees in the following group**
6. Click on the drop down arrow and select a group (e.g. Administration)
7. Click on **OK**
8. A blank training record appears
9. Key in the required data (date complete by, Course, Subject, Provider, etc)
10. Click on **Save**
11. Wait a few moments while WBS updates all employees Training Plan records
12. Note: This record has now been added to each individual's Training plan screen

Training History



Topic Headings

- [Purpose](#)
- [Location](#)

Additional

- [Field Breakdown](#)

Purpose

The Training History screen allows you to build up a detailed history of any training undertaken by an employee. It is possible to specify course details, costs and outcomes. This screen can be populated manually by clicking on the **Add** button (*sub screen toolbar*) or automatically using the **Complete** button in the Training Planner.

Location

1. Click on **Employee** (*menu bar*)
2. Click on **Employment**
3. Click on **Training History**

alternatively

This screen is not visible on the Outlook bar as part of the default installation of WBS. However, it is possible to add this screen using the Toolbar Management screen. Follow the instructions below to add the Training History screen to your user profile.

- Click on **Preferences** (*menu bar*)
- Select **Toolbar Management**
- Select **Employment** (*left hand side of the dialog box*)
- Under **Components**, check the **Training History** check box
- Under **Components**, highlight **Training History**
- Click on the **Change Toolbar** button (*right hand side of the dialog box*)
- Select **WizHR** from the **Please Choose a Menu Bar** drop down list
- Click on **OK**
- Click on **Close**

Skills



Topic Headings

- [Purpose](#)
- [Location](#)

Additional

- [Field Breakdown](#)

Purpose

The Skills screen allows you to track the skills of individual employees. You may add as many skill records as you require. It will then be possible to report/filter employees with particular skills.

Location

1. Click on **Employee** (*menu bar*)
2. Click on **Employment**
3. Click on **Skills**

alternatively

This screen is not visible on the Outlook Bar as part of the default installation of WBS. However, it is possible to add this screen using the Toolbar Management screen. Follow the instructions below to add the Skills screen to your user profile.

- Click on **Preferences** (*menu bar*)
- Select **Toolbar Management**
- Select **Employment** (*left hand side of the dialog box*)
- Under **Components**, check the **Skills** check box
- Under **Components**, highlight **Skills**
- Click on the **Change Toolbar** button (*right hand side of the dialog box*)
- Select **WizHR** from the **Please Choose a Menu Bar** drop down list
- Click on **OK**
- Click on **Close**

Training Overdue



Purpose

WBS allows you to quickly see which employees are overdue training courses. This information is recorded in the Overdue Training screen

Location

1. Click on **Company** (menu bar)
2. Click on Training Overdue

Mark a Course as Completed

1. Marking a course as completed may also be carried out in the individual employee Training Planner screen.
2. Open the **Overdue Training Screen**
3. Click on **List** tab
4. Double click on a training record (i.e. the training course the employee has completed)
5. This will bring you back to the **Details** tab
6. Click on **Complete** (sub screen toolbar)
7. The Training Completed dialog box appears
8. Click on the drop down arrow to the right of **Date Completed**
9. Select the date that the training course was completed on
10. Click on the pick list button to the right of **Assessment**
11. Choose from the pick list the employees assessment of the course (e.g. Excellent)
12. Click in the text box to the right of **Additional Cost** and key in any extra expenses which were accrued by the employee as a result of completing this course
13. Click on **OK**
14. The record is now removed from the Training Planner and placed in that employees Training History record

Reschedule a Training Course

1. Open the **Training Overdue** screen.
2. Click on the **List** tab
3. A list of all employees who have failed to complete their training courses by a specified date are displayed

4. Double click on an employees record to reschedule the training for another date. This will bring you back to the **Details** tab
5. Click on the **Reschedule** button (sub screen Toolbar). The Reschedule Training dialog box appears
6. Click on the drop down arrow to the right of **Complete by** and select a new future date that the employee must have the training course completed by
7. Click on **OK**
8. This employees record is removed from the training overdue screen

Over Due Training On Start Up

WBS facilitates the user who primarily uses WizHR to records training data. Every time you log onto WizHR, the training overdue screen can be prompted to the training overdue screen will appear. This window will list courses whose complete by date has expired.

1. Click on **Edit**
2. Click on **User Preferences...**
3. Click on the **Other** tab
4. Check to **Show Overdue Training on Startup** box
5. Click on **OK**