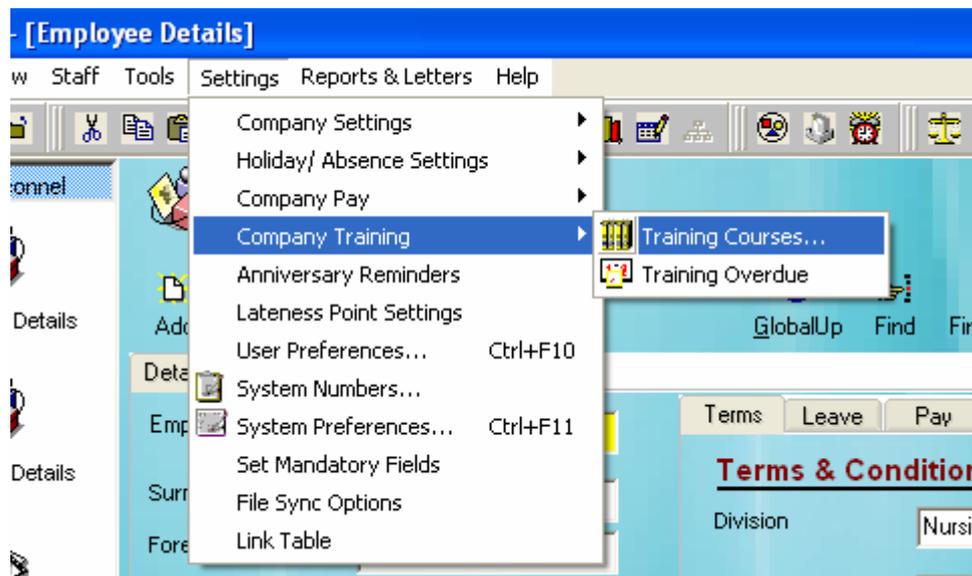


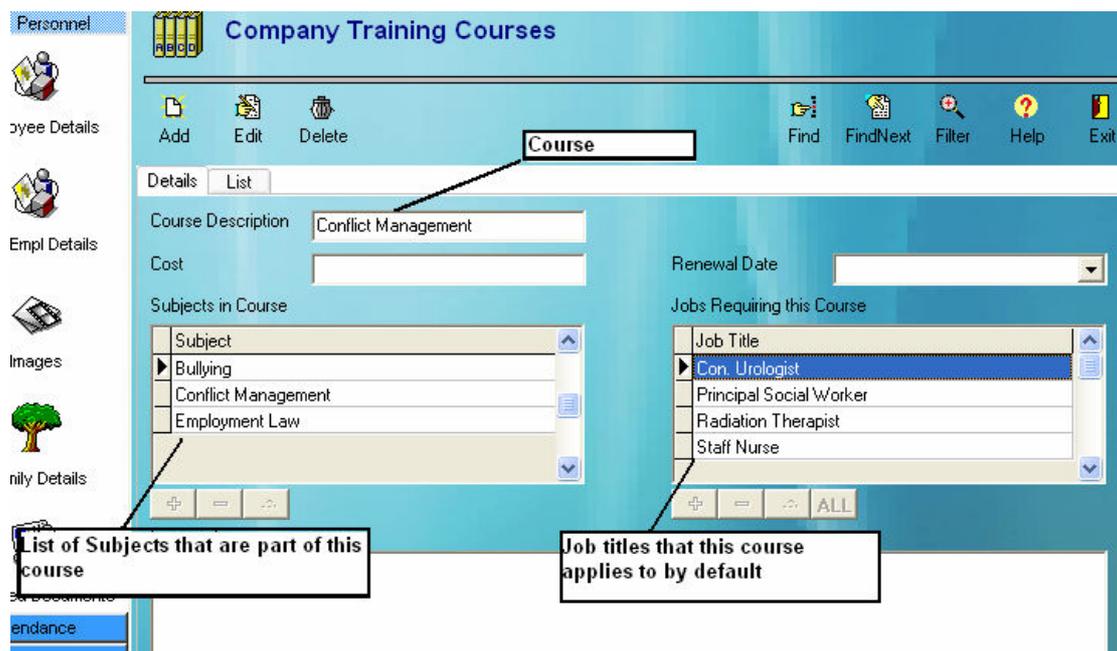
## Training Manager

The Training Management function has now been moved into one screen from where the whole system can more easily be managed. It encompasses the existing planner and history functions along with some new reporting functions. It deals solely with the mandatory courses that you have set up in the Company – Training Courses section where you have defined that certain job titles demand that certain courses and subjects be taken by your employees.

Looking back firstly at how the mandatory courses are set up you need to go to the following screen...

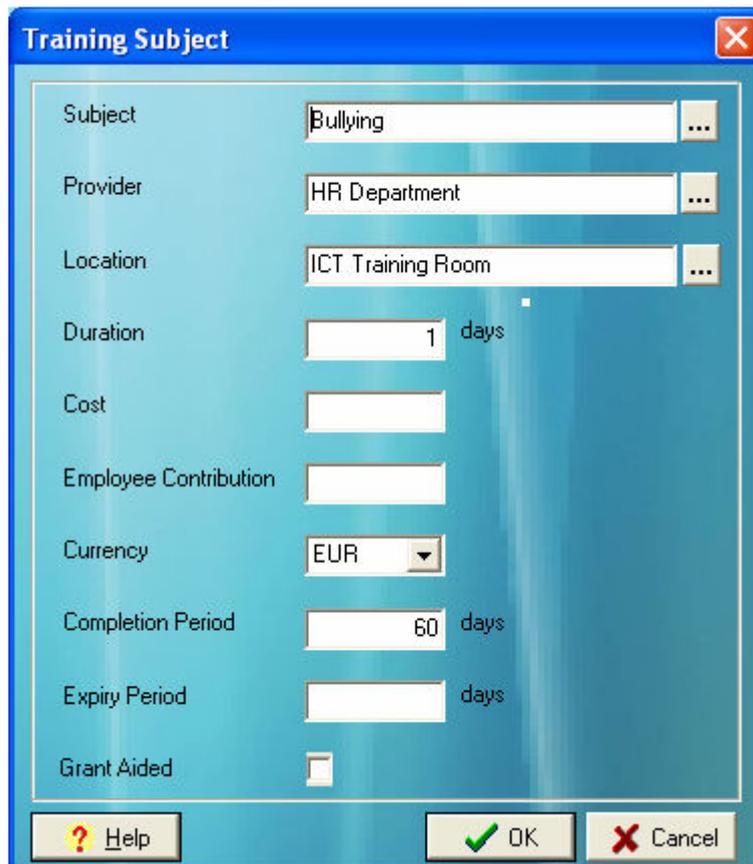


This is where the company courses are set up and applied to the various job titles. The Company Training Courses screen...



In the above screen you have a course description – Conflict Management, a list of subjects that form this course and also a list of job titles that, by default, are required to take this course.

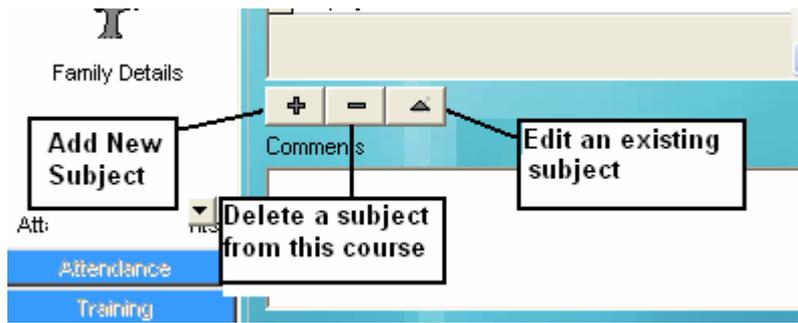
As each subject is added the user must define the characteristics it has and how it is handled by the training manager screen. When adding a subject to a course you must supply certain information as is displayed in the following screen...



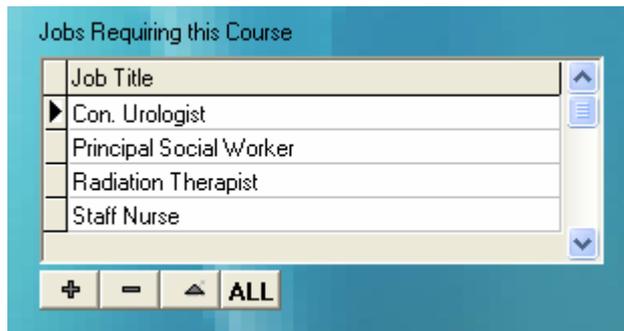
Subject	Bullying
Provider	HR Department
Location	ICT Training Room
Duration	1 days
Cost	
Employee Contribution	
Currency	EUR
Completion Period	60 days
Expiry Period	days
Grant Aided	<input type="checkbox"/>

For the most part these pieces of information are obvious as to what they mean but the important ones are the Completion Date and the Expiry Period. The completion date is used in conjunction with the employee's date of join. What the above screen is saying is that from the date an employee begins employment that they should have this particular subject completed within 60 days. The Expiry period relates to how long the subject lasts before the course has to be repeated. In the above case it is deemed as not having an expiry period so does not need to be repeated.

Adding, Deleting and Editing subjects on courses is done using the 3 buttons below the grid...

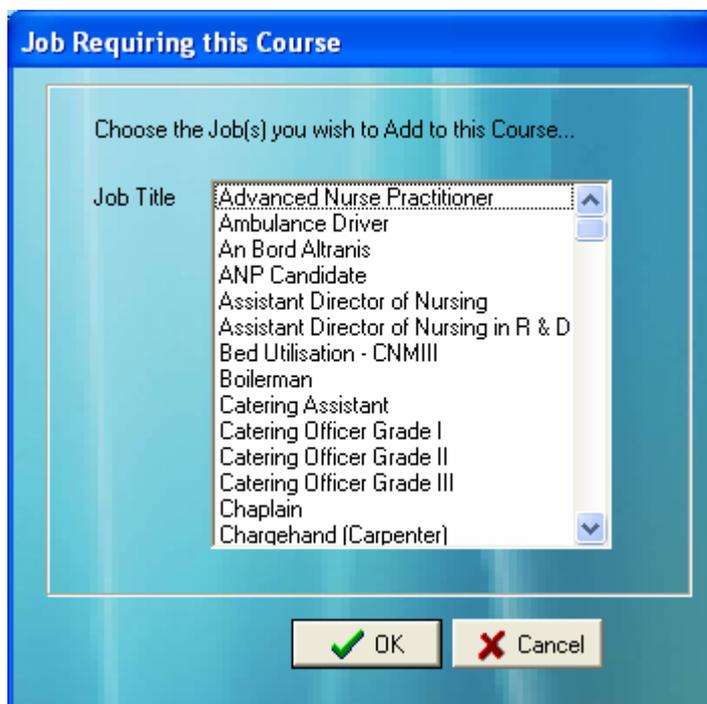


Applying job titles to courses is also handled in a similar manner. This is done using the grid on the right hand side of the screen...



The only difference with this one is that it has an "ALL" button. This button is used to signify that all job titles are, by default, to complete this course.

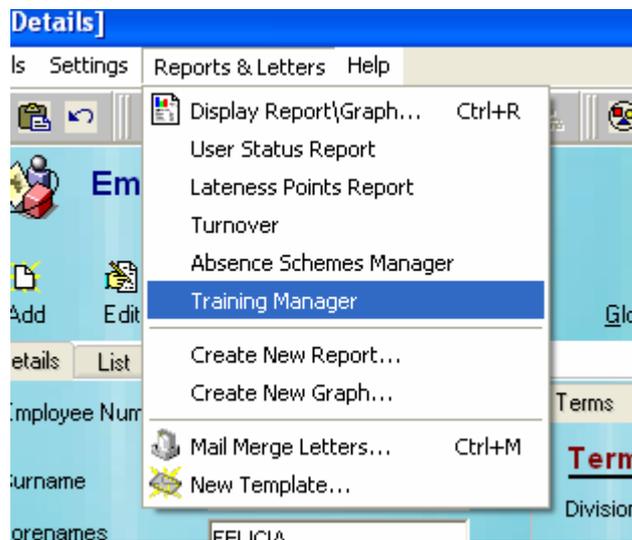
Adding a job title to the list will bring up the following screen...



Simply select the job title you wish to add to the course and click OK.

## Using the Training Manager Screen

The Training Manager screen is accessed by the following menu option...



And displays the following screen...

The Training Manager screen displays a table with columns: Employee Number / Forenames, Surname, Job Title, Course Name, Progress, and several status columns. The table lists 25 employees with their training progress for 'Conflict' courses. A legend at the bottom identifies status colors: Planned (cyan), Complete (green), No Record (red), Expired (yellow), and Planned but not yet expired (magenta).

Employee Number / Forenames	Surname	Job Title	Course Name	Progress	Status 1	Status 2	Status 3
5939 MICHELLE	CHAUKE	Staff Nurse	Conflict	0%	Bullying	Conflict	Employment Law
5742 NIALL	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5974 NOREEN	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5944 IMELDA	CLEARY	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5991 MARIE	CLEARY	Staff Nurse	Conflict	100%	Bullying	Conflict	Employment Law
5985 MARY	COFFEY	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
8831 ANGELA	COLEMAN	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
5544 ELAINE	COLEMAN	Staff Nurse	Conflict	0%	Bullying	Conflict	Employment Law
5117 COLIN	COLGAN	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
8826 JACKIE	COLGAN	Ward Orderly	Conflict	0%	Bullying	Conflict	Employment Law
5926 SUSAN	COLGAN	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5639 JULIA	COLLINS	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
9116 ADENKE	COSGROVE	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
9052 DESMOND N.	COTTER (DUFFY)	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
9107 MORAG	COX	Ward Orderly	Conflict	100%	Bullying	Conflict	Employment Law
9068 CLARE	COYLE	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
8893 DESMOND	CROCK	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
5951 ANN	CROSBIE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
9136 DECLAN	CUNNINGHAM	Ward Orderly	Conflict	0%	Bullying	Conflict	Employment Law
5815 EIMEAR	CUNNINGHAM	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
1428 FR. CHRIS	CUNNINGHAM	Staff Nurse	Conflict	66%	Bullying	Conflict	Employment Law
0027 JACQUELINE	CUNNINGHAM	Ward Orderly	Conflict	0%	Bullying	Conflict	Employment Law
0414 JOHN	CUNNINGHAM	Ward Orderly	Conflict	0%	Bullying	Conflict	Employment Law
9118 MARY	CUNNINGHAM	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
5335 ANN	CURLEY	Staff Nurse	Conflict	0%	Bullying	Conflict	Employment Law

Depending on the status of an employee's training requirement and how much they have either planned or completed the functionality on this screen can change to suit. There are 5 different points that a subject on a course can be...

- Planned
- Complete
- No Record
- Expired
- Planned but not yet expired

## What each point means

 Planned

This subject is planned for this employee. This allows you to view the details of the planned subject or you can choose to mark it as complete and furnish the relevant details.

 Complete

This subject has been completed. You may view or edit the historic training record.

 No Record

There is no record of this subject for this employee. You may add a planned record for the subject or you can skip this step and instead choose to add a training history record.

 Expired

This subject has been done by this employee but needs to be redone. You may plan a new training event for this subject or view the current history.

 Planned but not yet expired

This subject has already been completed by the employee, is still in date but a further course is planned for when the original runs out. You can edit the planned record or view the history for this subject.

The screen also displays the employee's progress status in the form of both a percentage and a visual representation as regards each course that the employee has assigned to them.

**Edit History**

urname	Job Title	Course Name	Progress			
HAUKE	Staff Nurse	Conflict	0%	Bullying	Conflict	Employment Law
HAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
HAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
EARLY	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
EARLY	Staff Nurse	Conflict	100%	Bullying	Conflict	Employment Law
OFFEY	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law
OLE			0%	Bullying	Conflict	Employment Law
OLE			0%	Bullying	Conflict	Employment Law
OLIGAN	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law

33% complete - 3 subjects assigned and only 1 completed

100% complete - all 3 subjects have been done and are current

0% complete - 3 subjects assigned but none complete yet

1 subject of the 3 assigned has been scheduled but the other 2 are not yet so

Where you have a situation that an employee is assigned to more than one course then the courses are represented on separate lines so that each course may be more easily identified and the employee's progress more clearly shown.

EILEEN	DUGGAN	Ward Orderly	Conflict	0%	Bullying	Conflict	Employment Law
JENNIFER	DUNNE	Principal Social	Interviewing Skills	0%	Interviewing Skills		
JENNIFER	DUNNE	Principal Social	Conflict	33%	Bullying	Conflict	Employment Law
MARY	DI INN	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law

Interviewing Skills course is required by this employee. Only 1 subject in the course which has neither been scheduled nor completed

Conflict Management course is assigned to the same employee. There are 3 subjects, 1 of which has been completed (33%) and the other 2 remain to be scheduled

**Functions available on the Training Manager screen**

As mentioned earlier this screen brings together the functions which were previously accessed separately. It has been designed to essentially manage the training management routines all in one screen. Moving subject to subject while on one employee enables the functionality that is applicable to the current status of that subject.

You will be aware of the different points relating to the current status of a subject that was covered earlier and these are what determine the functionality that is presented to the user. Take for example a situation where you click on the subject for an employee in the following example...

Employee Number /	Forenames	Surname	Job Title	Course Name	Progress			
5969	MICHELLE	CHAUKE	Staff Nurse	Conflict	0%	Bullying	Conflict	Employment Law
5742	NIALL	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5974	NOREEN	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5944	IMELDA	CLEARY	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5991	MARIE	CLEARY	Staff Nurse	Conflict	100%	Bullying	Conflict	Employment Law
5985	MARY	COFFEY	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law

The only available button that the user can click is “Show Progress” which will refresh the grid with the latest available information. Clicking on the subject “Bullying” on the first employee on this grid will change the display to the following...

**Show Progress** **History** **Planner**

Employee Number /	Forenames	Surname	Job Title	Course Name	Progress			
5969	MICHELLE	CHAUKE	Staff Nurse	Conflict	0%	Bullying	Conflict	Employment Law
5742	NIALL	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5974	NOREEN	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5944	IMELDA	CLEARY	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
5991	MARIE	CLEARY	Staff Nurse	Conflict	100%	Bullying	Conflict	Employment Law
5985	MARY	COFFEY	Radiation Therapist	Conflict	0%	Bullying	Conflict	Employment Law

As you can see the subject “Bullying” has become highlighted and the buttons available to the user have changed. The “History” and “Planner” buttons are now available. Because the status of this subject is “No Record” it means that even though the subject is required by the employee it has not yet been either undertaken or even scheduled to be done. In this case you can either “Plan” the subject for the employee or if it is the case that in fact the employee has undertaken the course then you can enter a Training History record. Clicking the History button will present the following screen...

**Employee Training History**

Name: 5569 - Ms M CHAUKE

Save Cancel Delete GlobalUp Find Find text Filter Print Help Exit

**Details**

Date: 20/4/2010 Duration: Day(s)

Expiry Date: Cost:

Course Type: Additional Cost:

Course: Conflict Management Employee Contribution:

Subject: Bullying Passed:

Provider: Assessment:

Location: Grant Aided:

Notes: Currency: EUR

This is where you enter the details of the subject undertaken and any other relevant details you have on that you wish to record. Finally clicking “Save” will commit the record to the Training History screen for this employee and will update the status of this subject on the Training Manager Screen.

Mandatory Courses Expired Subjects Course Summary Job Details

ss View Details Edit History

Status now changed and different buttons enabled to reflect this status

Forenames	Surname	Job Title	Course Name	Progress			
MICHELLE	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law
NIALL	CHAUKE	Staff Nurse	Conflict	33%	Bullying	Conflict	Employment Law

Now that a history record has been entered for this subject the buttons available to you have changed to “View Details” and “Edit History”. View Details will bring up the details that have just been entered or Edit History will allow you to make changes to those details if you so wish.

Now clicking on to the “Employment Law” subject for the same employee the buttons go back to History and Planner again. This time if we click the “Planner” button we are presented with the Training Planner screen...

**Training Planner** Name: 5365-Ms M CHAUKE

Save Cancel Delete Courses Complete Comp. Courses Schedule GlobalUp Find FindNext Filter Print Help Exit

**Details**

Complete By: 30/04/2010 Duration: 1 days

Course: Conflict Management Expiry Period: 0 days

Subject: Employment Law Cost: 0

Provider: Law Society of Ireland Employee Contribution: 0

Location: External Grant Aided:

Course Type: Part-Time Currency: EUR

Scheduled for: 30/04/2010

Notes:

Enter your details as desired and click Save to complete the record. You are now returned to the Training Manager screen and again the note the change in the status for this subject.

[View Progress](#)
[View Details](#)
[Complete](#)

Status now at the "Planned" stage so buttons available have changed to reflect this

Employee Number /	Forenames	Surname	Job Title	Course Name	Progress			
	MICHELLE	CHAUKE	Staff Nurse	Conflict	83%	Bullying	Conflict	Employment Law
	NIALL	CHAUKE	Staff Nurse	Conflict	83%	Bullying	Conflict	Employment Law

Clicking the "View Details" button will re-display the details just entered on the planner screen where you have the option of editing them or marking the subject as complete. Alternatively from the above screen clicking the "Complete" button will allow you to directly complete the subject as the following screen displays...

**Training Completed** [Close]

Date: 20/04/2010

Assessment: Good

Additional Cost: [Empty]

Course Type: Part-Time

Passed: [Empty]

Notes:  
All assignments were completed in a timely fashion and the student showed a good aptitude for the subject.

[OK] [Cancel]

Once the details have been entered and you click OK then the record moves from being a Training Planner record to a Training History record. This will again change the status of the subject for this employee and will again change the buttons available to the user.

Mandatory Courses | Expired Subjects | Course Summary | Job Details

View Details | Edit History

Progress has been updated now to 66% as 2 of the 3 subjects are complete. Buttons available now reflect the new status of this subject

Forenames	Surname	Job Title	Course Name	Progress	Bullying	Conflict	Employment Law
MICHELLE	CHAUKE	Staff Nurse	Conflict	66%	Green	Cyan	Blue
NIALL	CHAUKE	Staff Nurse	Conflict	33%	Red	Cyan	Red
NOREEN	CHAUKE	Staff Nurse	Conflict	33%	Red	Green	Red

At this stage for this subject you may view the history record (“View Details”) or edit the history record (“Edit History”).

## Mandatory Courses

The Mandatory courses tab is essentially a report showing the courses assigned to each employee and their status in terms of percentage complete.

Mandatory Subjects | Mandatory Courses | Expired Subjects | Course Summary | Job Details

ip.	Forenames	Surname	Job Title	Course Name	Progress
39	MICHELLE	CHAUKE	Staff Nurse	Conflict Management	66%
42	NIALL	CHAUKE	Staff Nurse	Conflict Management	33%
74	NOREEN	CHAUKE	Staff Nurse	Conflict Management	33%
37	MARTIN	CLAYTON-LEA	Cln. Eng. Tech.		
44	IMELDA	CLEARY	Staff Nurse	Conflict Management	33%
31	MARIE	CLEARY	Staff Nurse	Conflict Management	100%
73	MARZELA	COFFEY	Domestic		

All courses for a particular employee are listed on the same row as in the following example...

Emp. No.	Forenames	Surname	Job Title	Subject	Progress	Completion %
16	JENNIFER	DUNNE	Principal Social	Interviewing Skills	0%	Conflict Management 33%
15	MARY	DUNNE	Radiation Therapist	Conflict Management	0%	

In the above example you can see that the Interviewing skills has no subject yet completed so is at 0% and the Conflict Management course is 33% complete.

## Expired Subjects

The Expired Subjects tab allows you to create a report based on a date showing all employees who have undergone training in subjects that have now expired. The expiry date is calculated based on the original set up of the subject in the Company Training Courses screen earlier. In there the number of days that the course is valid for is set by the number of days entered in the "Expiry Period" box.

The Expired Subjects report is based on dates. The first date is the date up to which the report is to check for expiry. What this means is that you can run reports to see which subjects will expire over the next few weeks or months. You can also specify to only show subjects that have expired since a certain date.

**Training Manager**

Date up to which report is to be run for: 22/04/2010

Build Report

Please Select the date to run the report for: 22/04/2010

Subjects which have expired since this date will only be shown if option is ticked to apply

Only Show Subjects that have expired since: 22/04/2008

I wish to restrict by subject  I wish to restrict by Course

Subject	Selected
Bullying	<input type="checkbox"/>
Conflict Management	<input type="checkbox"/>
Employment Law	<input type="checkbox"/>
Interviewing Skills	<input type="checkbox"/>

Course	Selected
Adv. Communication Skills	<input type="checkbox"/>
Basic Fire Training	<input type="checkbox"/>
Basic Network Training	<input type="checkbox"/>
CCSE	<input type="checkbox"/>
CPR	<input type="checkbox"/>
Comm. Vault Galaxy 6.1 Adm	<input type="checkbox"/>
Conflict Management	<input type="checkbox"/>
Catalogue Update Course	<input type="checkbox"/>

The report itself can be run based on both mandatory and non-mandatory subjects. If you wish also to restrict based on certain subjects or courses this may also be done. Just tick the appropriate option at the top of the grid and select the subjects or courses as appropriate.

**Training Manager**

Settings Print Excel Exit

Mandatory Subjects Mandatory Courses Expired Subjects Course Summary Job Details

Please Select the date to run the report for

22/04/2010 Build Report

Report Filter options

Employee Number /	Forenames	Surname	Job Title	Course Name	Subject	Expired
1459	PADRAIG	MURRAY	Staff Nurse	Conflict Management	Bullying	25/01/2010
2003	RACHEL	ADDERLEY	Con. Urologist	Conflict Management	Bullying	21/04/2010
2003	RACHEL	ADDERLEY	Con. Urologist	Conflict Management	Employment Law	21/04/2010
5335	ANN	CURLEY	Staff Nurse	Conflict Management	Bullying	16/04/2010
8667	RICHARD	ADEMOSU	Ward Orderly	Conflict Management	Bullying	27/05/2009

This report can either be printed as a html report or exported to Excel where further processing can take place on it.

### Course Summary

The Course Summary screen is simply a graphical representation of all the current courses that are entered on your system for use. The report shows a count of the subjects per course and a list of those subjects.

**Training Manager**

Settings Print

Mandatory Subjects Mandatory Courses Expired Subjects Course Summary Job Details

Course name /	Count			
Conflict Management	3	Bullying	Conflict Management	Employment Law
Interviewing Skills	1	Interviewing Skills		

### Job Details

The Job details report shows the list of job titles in your system and the mandatory courses that they have associated with them.

Training Manager		
		<a href="#">Settings</a>
<a href="#">Mandatory Subjects</a>	<a href="#">Mandatory Courses</a>	<a href="#">Expired Subjects</a>
<a href="#">Course Summary</a>	<a href="#">Job Details</a>	
Job Title /		
Con. Urologist	Conflict Management	
Dir. of Oper. Services	Interviewing Skills	
Principal Social Worker	Interviewing Skills	Conflict Management
Radiation Therapist	Conflict Management	
Staff Nurse	Conflict Management	
Ward Clerk	Conflict Management	
Ward Orderly	Conflict Management	

Again the above two reports can be either exported to excel or printed as a html report.