

Simply Personnel – Training Manager

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-Training Workbook-



Objectives

- Schedule, manage, monitor and maintain courses
- Book delegates onto courses
- Track qualifications
- Analyse budgets and cost breakdowns
- Track costs
- Set tasks to keep track of courses, delegates and qualification expiry dates
- Run , create and save reports
- Create mail merged document templates and merge with employee and course data
- Create email templates to send to delegates
- Upload certificates



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Introduction to Simply Personnel Training Manager

The Training Manager Module allows a user to carry out several training related tasks such as scheduling courses and booking employees onto those courses as delegates. A user can also define the training needs for the company which will then automatically update an employee's training record according to their job title and any needs linked to it. Employees can also be awarded 'Qualifications' automatically, the system will then alert a user if the qualification is about to expire. Finally the system allows a user to track and report on their training budget and expenditure throughout their budget year.





System Setup

The System setup section allows a user to configure the module to meet their company's requirement i.e. defining the qualifications employees may be awarded, creating budget years or setting up courses employees may attend.

• Select system setup

	Training Manager	
\subset	🔀 System Setup	Task Summary
	Schedule Training Course	1 0 URGENT TASKS
	Course Maintenance	1 0 UPCOMING TASKS
	Course Diary	
	Q Manage Delegates	
	📫 Reports	
	Back	

• The system will take the user to the system setup configuration table.

Qualifications	Course Level Tasks
Budgeting	Delegate Level Tasks
Training Provider	Standard Task
E Courses	Training Status
BC Standard Training Need	Training Documents
Training Needs Profiles	

• Select qualifications



Qualification Maintenance

This area allows a user to define the Grades, Subjects and Qualifications that employees will be awarded when a course has been completed or alternatively qualifications that employees may have previously achieved.

	Qualifications Setup
\bigcirc	At Grade
	Qualifications
	Subject
	Back

Grade: Allow a user to create grades and link qualifications employees have been awarded i.e. Pass, Fail, Merit etc.

	Qualification Grade Maintenance	x			
Main					
Name:	 🔽 In Use	•	Qualification Grade Ma	aintenance	- 🗆 ×
		Name		In Use	Add
		Certificat	e of Attendance	Ø	Update
		Fail			Delete
		Pass		M	Close
	OK Cancel Hel	lp 🛛]

- To create a new grade, click on 'Add'
- Enter grade
- Click 'ok'



Qualifications allow users to define the type of qualification employees may be awarded i.e Certificate of attendance etc.

Qualification Maintenance: This option allows a user to create the level of qualifications employees may be awarded i.e. A Level; BTEC; GNVQ etc

To create a new qualification, click on 'Add', enter the name of the qualification and a description then click 'ok'.

	Qualification Maintenance	x			
Main Name:	I				
Description:	🔽 In Use		Qualification Maintenance		- 🗆 X
		Name	Description	In Use	Add
		A Level	A Level		Update
		BA	BA		
		Degree	Degree	M	Delete
		Diploma	Diploma		Close
		HND	HND		
		Masters	Masters		
	OK Cancel	Help			

To create a new qualification;

- click on 'Add'
- enter the name of the qualification description
- Select 'ok'.

Subject Maintenance: This option allows a user to define the subjects of qualifications that employees may be awarded I.e. First Aid at Work; Food Hygiene; Manual Handling etc

- Select Add
- Ok to save.

	Subject Maintenance	x					
Main							
Name:							
Description:		51					
	🔽 In Use		S	ubject Maintenance			
			Name	Description	In Use	• (Add
			Administration	Administration	R		Undate
			Business Planning	Business Planning			
			Customer Care	Customer Care		=	Deleti
			Effective Sales Techniques	Effective Sales Techniques			Close
			First Aid	First Aid			
			Fork Lift Truck Driving	Fork Lift Truck Driving			
			Health and Safety	Health and Safety			
		_	Management Skills	Management Skills		_	
	OK Cancel Hel	p	T 1 0044	T : 0044		*	



- To create a new subject, click 'Add'
- Enter the name of the subject and a description
- Click 'Ok'.

Budgeting

This area allows users to track and report on any costs that may have been incurred as a result of any training organised or completed. In order to track costs first define various aspects of the training budget. It allows the user to specify budge holders per department



- Select budgeting
- The system will now present the budgeting table



Budget Holder Maintenance

Budget Holder Maintenance is where a user may specify which employees have training budgets allocated to them.

Training Budgets			
Budget Holder Maintenance		Training Budget Main	tenance
Budget Type Maintenance	•	Budget Holder Maintenance	- 🗆 X
Cost Type Maintenance	Name Karren Jones	in Use	Add Update
Analysis Code 1 Maintenance			Delete Close
Analysis Code 2 Maintenance			
E Budget Year Maintenance			
Back			

- Select 'Budget Holder Maintenance'
- Select 'Add'
- Click the button to the right of the 'Budget Holder' field and select the relevant employee.
- Click select

Budget Holder Maintenance	Budget Holder Maintenan		Employee Search	2
Name in Use Add. Karren Jones P Dukke Close	Man E Budget Holder I I Use	inployee Search Employee Tree Employee ID: Surname: Forename:	Search Results: 10 Sumanne <u>s</u> Other Names 1 Abbott Albert 2 Adams Matthew 25 Ainsworth Julie 26 Alcock Vicky	S Department Location Management London Sales London Sales London Sales London
		Payroll ID: NI Number:	3 Bathley Catherine 4 Besky James 29 Brown James 32 Button Domonic 37 Butter Adam 30 Clark Simon 10 Cockrill Loyd 40 Colins Sam 5 Cooke Jenny	Management London Production London Production Leeds Production London Production London Production London Production London Administration Simmigham Accounts London
	1 C C	Main Date Work Dept/Loc	15 Cooper Rodger 17 Eden John 11 Emmerson Kieth 18 Empson Phillip 13 Falkner Sam 31 Glover Jane 19 Graham Jane	Production Leeds Production Leeds Sales London Production Leeds Production London Sales London Administration Leeds
	C T	Course Training Needs	Search Select Close	Clear All

This process may be repeated to capture all budget holders.



Budget Type Maintenance

This option allows users to name their various training budgets i.e Marketing's training budget or it could be you require just one budget type called Training Budget.

Das Das	shboard – 🗆 🗙
Training Budgets	
Budget Holder Maintenance	Training Budget Maintenance
Budget Type Maintenance	Budget Type Maintenance – – ×
Cost Type Maintenance	Name In Use Add Training Facilities ⊠ Undate
Analysis Code 1 Maintenance	Travel Close
Analysis Code 2 Maintenance	
Budget Year Maintenance	
Back	

- Select 'Budget Type Maintenance'
- Select 'Add'
- Enter the name of the budget and click ok.

	Budget Type Maintenance	x
Main		
'Name:	I ☑ In Use	
	OK Cancel Help	



Cost Type Maintenance

This section allows you to determine the different types of costs that can be incurred as a result of arranging or undertaking training.

Dash	board – 🗆 🗙	
Training Budgets		
Budget Holder Maintenance	Training Budget Maintenance	
Budget Type Maintenance	Cost Type Maintenance –	- ×
Cost Type Maintenance	Name In Use Ad Course Cost 🕅 Use	id
Analysis Code 1 Maintenance	Delegate Cost 🛛 De	elete ose
Analysis Code 2 Maintenance		
Budget Year Maintenance		
Back		

- Select Cost Type Maintenance.
- 'Add'
- Enter the name of the cost type ok.

	Cost Type Maintenance	x
Main		
Name:		
	🔽 In Use	
		_
	OK Cancel I	Help



Analysis Code 1 Maintenance & Analysis Code 2 Maintenance

This section allows you to further 'drill down' into the Cost types and provide 2 extra levels in describing costs.



- Select Analysis Code 1
- Select Add to enter another level of detail for the cost types

E.g cost type = Delegate cost

Analysis code 1 = Travel

Do the same for Analysis code 2



ا	– 🗆 🗙	
Name	In Use 😗	Add
Breakfast	R	Update
Dinner		
Drinks		Delete
Fuel		Close
Lunch		
NA		
Taxi		
Train		_

Budget Year Maintenance

This section will allow the user to define the budget year, when the budget is received how many periods of budget there are.



- Select Budget Year Maintenance.
- Select 'Add' and name the budget year i.e 2015.
- Enter the 'Start Date'
- Define how many periods of budget (12 may mean a sum each month)



In the 'Periods' field the user is are able to specify whether the training budget is awarded in tranches e.g quarterly or whether it is one lump sum i.e if the budget is awarded as a lump sum the Periods would be 1, if quarterly the periods would be 4 etc

Finally select 'Add' to define the end date of the budget year.

Training Budget Maintenance

This section will allow you to combine the previous elements and assign budget holders to Budget Types and Budget Years.



Select Training Budget Maintenance, click 'Add' then select the desired budget year, budget holder and budget type. Define the amount and click ok



		_				
			Tra	ining Budg	et Maintena	ance ×
		N	1ain			
		Í	Budget Year	2015		
			Budget Hold	er: Karren Jor	nes	
			Budget Type	: Training F	acilities	
			Total Budget	£0.00		
Training Budget Maintena	nce — 🗆 🗧		Period	Start Date	End Date	Amount
Budget Holder Budget Type Budget Year	Training Budget Add	5	1	01/01/2015	31/12/2015	0.00
Karren Jones Training Facilit 2014	25000.00 Update					
Karren Jones Training Facilit 2015	0.00 Delete					
	Close					
	Enter Amount		x			
	Amount: E0.00 Enter the new amount for this pe	riod.		ОК	Auto-split	Update Help
	ОК	Ca	ncel			

Training Providers

This section allows users to record details of all the company's training providers which can then be linked to a standard course.

٩	Dashboard		– 🗆 🗙
Training System Setup			
Qualifications		Course Level Tasks	
Budgeting		Delegate Level Tasks	
Training Provider		Standard Task	
E Courses		Training Status	
BC Standard Training Need		Training Documents	
Training Needs Profiles			
Back			

• Select Training Providers



- Click add
- Enter the details
- Select ok

Main Address Provider Name: I	× .		
Contact Name:	Training Provider Mainten	iance	– = ×
Fax:	Name	In Use	Add
Email:	Excellence in Training		Update
	Open College	M	Delete
in ose	Time2Train	M	Class
	I rain with Ease		Liose
OK Cancel Help			



Standard Course Maintenance

This section allows the user to define details of standard courses available to employees and standardize the information to allow the user to reschedule the course.

	•	Dashboard		– 🗆 X
	Training System Setup			
	Qualifications		Course Level Tasks	
	Budgeting		Delegate Level Tasks	
	Training Provider		Standard Task	
4	E Courses	>	Training Status	
	A BC Standard Training Need		Training Documents	
	Training Needs Profiles			
	Back			

- Select 'Courses'
- Select 'Add'
- Enter the details of the course. The expiry date on this section relates to the expiry date of the course itself.

Main Qualifica	tions					
Course Code:	ADVANCED DRIVE					
Description:	Advanced Driving					
Administration:	 External Internal 		🜒 Sta	ndard Course Maintenance) Э	_ □ >
Provider:	Open College 🔹		Name	Description	In Use 🔺	Add
Trainer Name:	Jim Tumer		ADVANCED DRIVE	Advanced Driving	R	Undate
Duration:	1 Davs 🔹		CSS	Customer Service Skills	M	Delate
			FAID	First Aid		Delete
Start Time:	00:00 End lime: 00:00		FL1	Fork lift	M	Close
CPD Hours:	0:00 CPD Accredited		FL2	Fork Lift Refresher	M	
Expires In:	0 Years •		H&S	Health & Safety	R	
Course			НН	Hard Hats	Ø	
Document:	U	Set Open	IND	Induction	R	
Colour:	—		1.10	10 0.000 010		
	In Use					



The tab entitled 'Qualifications' contains data input in the previous qualification set-up. This will allow the user to input the expiry date of the qualification. In applying an employee to this course a qualification will be awarded upon completion and then a task based on the expiry date will be created to alert the qualification requires renewal.

Standa	ard Course Maintenance	×	(Qualification Details	x	
Main Qualifications Qualification T	Subject here are no items to show.		Details: Qualification: Subject: Grade: Establishment: Notes: Expires In:	A-Level Administration		se Add Update Delete Close
			Has .	Health & Sarety	M	_
		_		Hard Hats	M	
	Add Update Delet	e	1.40	Induction		
	OK Cancel H	elp				



Standard Training Need

Here the user can define an employee's standard training needs and combine them into a profile that can then be linked to their specific job role. Any employee currently assigned to the post with a linked Training Needs Profile will automatically have their Personnel Manager record updated with the appropriate need.

- Select 'Standard Training Need'
- Select 'Add' then provide details of the training need.

The user can also at this stage link a need to a course so if the employee is scheduled onto the standard course and they complete it will also complete the linked need. This will allow the user to determine if a training need is a high, medium or low priority.

The course type 'None' should be used if the training need is going to be met by any other method apart from attending a course i.e shadowing or mentoring.

Dashb	oard – 🗆 🗙
Training System Setup	
Qualifications	Course Level Tasks
Budgeting	Delegate Level Tasks
Training Provider	Standard Task
a Courses	Training Status
BC Standard Training Need	Training Documents
Training Needs Profiles	
Back	

Non-standard Course may be used if it can be met with an ad-hoc course.



Standard	Training Need Main	tenance	_ 🗆 ×	Stanuaru I	raining weed maintenance	
Status	Course Code	In Use	Add			
Computer Skills	MS	R	Update	Training Need:		
Customer Service Skills	CSS	M		Course Turne:	O Naza	1
Driving skills	ADVANCED DRIVE		Delete	course type.	0 None	
Factory safety	HH	M	Close		 Standard Course 	
First Aid	FAID	M			O Non-standard Course	
Fork Lift Refresher	FL2	M		Course Code:	FAID -	
Fork Lift Truck Skills	FL1	M		Deserve		1
Health & Safety Training	H&S	M		Description:	First Aid	
	110	_		Priority:	-	
					🖉 In Use	
						_
					OK Cancel He	
						٢.

The priorities for Standard Training Needs are setup by clicking on the 'System Setup' tab at the top of the screen and then selecting the 'Training' icon, from the menu. Select 'Training Need Priority Maintenance'.

			Simply Personnel - Dashboard			- 5 ×
Company Work Employee Time &	Training Recruitment Company System Su Details Parameters De	REPORTS OPDATES DOLD	IMENTS HELP			
	Budgeting Courses (Personnel Only) Standard Course Maintenance Training Provider Maintenance					
	Course Level Task Maintenance Delegate Level Task Maintenance Standard Task Maintenance Training Need Priority Maintenance	ager	Dashboard		- • ×	
V	Standard Training Need Maintenance TNA Profile Maintenance Training Status Maintenance	up] T	ask Summary		
	Course M	aintenance		O UPCOMING TASKS 210 FUTURE TASKS		
	Course Di	ary				
	Q Manage D	elegates				
	Reports					
	Back					



Training Needs Profiles

This section is where the user will group together the previously set-up training needs into a training need profile.

• Select 'Training Needs Profiles' to open the section

Dash	board – 🗆 🗙
Training System Setup	
Qualifications	Course Level Tasks
Budgeting	Delegate Level Tasks
Training Provider	Standard Task
E Courses	Training Status
BC Standard Training Need	Training Documents
Training Needs Profiles	
Back	







Once the Training Needs Profile has been created and assigned relevant training needs the next thing is to link them to a job post. To do this go back in the Personnel system setup>Business Rules>Posts

•	Dashboard	– 🗆 X
Personnel System Setup		
E Company Details	Post TNA Profile Positions In Use	- • ×
H Business Rules	Accounts Manager Managers 999 📈 Posts 🗙	Update
Workflow Processes	Post Maintenance Post: Factory Operative	Close
System Parameters	Reports to: Factory Manager Positions: 999	
Screen Designer	Shares: 1 In Use TNA Profile:	
	Description Document: Administration Factory Operative Managers Sales Warehouse Help	
Back		

Once you have linked a Training Need Profile to the relevant job post, this will apply all the training needs to the employee's record on the Training Needs/Profiles tab.





•	Employee	Maintenance	e - 29 - Brow	n,James			–
	Training / Qualifications Training	g Needs/Profiles	CPD				L URGENT TASKS
James Brown Factory Operative Production London Reports To:	Training Need Driving skills Factory safety First Aid Fork Lift Refresher Fork Lift Truck Skills Health & Safety Training Show completed needs	Course Code ADVANCED I HH FAID FL2 FL1 H&S ND Add Course	Add	Target Date	Status Outstanding Outstanding Outstanding Outstanding Outstanding Outstanding Outstanding	F F F F	Absences Holidays
Personal Work	TNA Profile TNA Profile Factory Operative Warehouse	No. Needs 7 6	Completed N. 0 0	. <mark>% Complet</mark> 0.00 0.00	ed <mark>Standard</mark> ☑ ☑		Click the charts for more information
Attendance Training / Qualifications Docs / Contracts Other		New	Add	Update.	. Delete		Employment Calculator Book Holiday Record Absence Attendance Record Holiday Card Save Cancel

To mark the need as completed:

- Select the training need
- Click update
- Change the status
- Click ok

This will then detail a percentage of the Training Needs Profile completed. If the need is linked to a course and the employee completes the course this will automatically complete the need. Alternatively as below the user can manually completed the need .

٩	Employee	Maintenar	ice - 29 -	Brown, James				- = ×
	Training / Qualifications Training Training Needs:	g Needs/Profil	es CPD				A URGENT	TASKS
	Training Need	Course Co	de D DRIVE	Target Date	Status	^	Absences	
	Factory safety	HH	o brave		outstanding	-		
James Brown	First Aid	FAID			Training N	eed	3	-
Factory Operative	Fork Lift Refresher	FL2		Main Details				
Pactory Operative	Fork Lift Truck Skills	FL1				-		
Production	Health & Safety Training	H&S		Target Date:				
London	4	THE		Status:	Outstanding	-		
Reports To:	Show completed needs	Add Cou	ise A	Notes:	Outstanding Completed			
	Training Profiles:							
Personal	TNA Profile	No. Needs	Comple					for more
Personal	Factory Operative	7	0					or more
Work	Warehouse	6	0					
Attendance								Calculator
Training / Qualifications							•	oliday
Docs / Contracts				- (ок	Cancel	Help	osence
								Record
Other		New	A	dd Updat	e Delete	:	Holid	ay Card
							Save	Cancel



Course Level Tasks and Delegate Level Tasks

This section will allow you to define automatic tasks for courses.

- Select 'Course Level Tasks' then select 'Add'.
- Provide a name of the task you would like to be reminded about in association with Courses.
- Click ok

	Dashboard –	□ ×
Training System Setup		
Qualifications	© ♥ ♥ ♥ ♥ Course Level Tasks	
Budgeting	Delegate Level Tasks	
Training Provider	Standard Task	
E Courses	Training Status	
A BC Standard Training Need	Training Documents	
Training Needs Profiles		
Back		

•	Dashboard	– 🗆 X		
Training System Setup		Course Level Task Maint	enance	- 🗆 ×
Qualifications	요갖 Course Level Tasks	Name Book Equipment	In Use	Add Update
Budgeting	Delegate Level Tasks	Book Trainer Book Training Room Order Refreshments		Delete Close
Training Provider	Standard Task	Receive Delegates Evaluation Forms Send Evaluation Forms	R R	
a Courses	Training Status			
A BC Standard Training Need	Training Documents			
Training Needs Profiles				
Back				

Repeat this procedure for adding automatic tasks for delegates.



•	Dashboard		– 🗆 🗙	
Training System Setup				
Qualifications		Course Level Tasks		
Budgeting		Delegate Level Tasks		>
Training Provider		Delegate Level Task Mai	intenance	×
E Courses		Name Bring Appropriate Equipment Wear Suitable Clothing	In Use	Add Update Delete
BC Standard Training Need				Close
Training Needs Profiles				
Back		L		

- Select 'Delegate Level Tasks' then select 'Add'
- Provide a name of the task needed to be reminded about in association with Delegates on the course.
- Click ok



Standard Task

This area will allow as user to group course level tasks and delegate level tasks to a standard course.

The section will list the standard courses you have set-up.

•	Dashboard	– 🗆 X	
Training System Setup			Standard Task Maintenance – 🗆 🗙
Qualifications	Course Level Tasks		Name Description In Use Update ADVANCED DRIVE Advanced Driving Image: Close Close
Budgeting	Delegate Level Tasks		CSS Customer Service Skills FAID First Aid FL1 Fork lift FL1 For
Training Provider	Standard Task		H2 Fork Lift Keresher R H&S Health & Safety R Add to AL
E Courses	Training Status		
A Standard Training Need	Training Documents		
Training Needs Profiles			
Back			
Step1: Select 'Standa	ard Task'.		
		Step	<mark>2</mark> : Select the course you wish to
		com	bine your previously set-up tasks with
		and	select 'Update'.

Standard Tasl	k Mainten	ance ×				
Course Level Tasks Delegate	e Level Tasks	3				
Task	Days	Added		Standard Task Maintenar	nce	- • ×
Book Equipment	14	Before	Name	Description	In Lise	Undate
Book Trainer	21	Before		E Advanced Driving		Opdate
Book Training Room	14	Before	CSS	Customer Service Skills		Close
Order Refreshments	7	Before	FAID	First Aid		
Send Evaluation Forms	7	Before	FI1	Fork lift		
Receive Delegates Evaluat	i 7	After	FL2	Fork Lift Refresher		
			H&S	Health & Safety		
						Add to All
	Conc		St	andard Course Tasks	X	
	Cano	нар	Course Code:		ОК	
			Description:	Advanced Driving	Cancel	
			Task:	Book Equipment 🔹		
			To Be Added:	14 🛟 Day(s)		Step4: You o
<mark>Step3:</mark> 'Add' you	will t	hen be		Before Course		then state h
prompted to select	the tas	k. 📃		After Course		
						many days b
						or after the
ersion 1						
raining Manager			Page 27			reminder to



Then do the same on the Delegate Level Tasks.

Standard Task I	Maintena	ince 🗙	🕘 Sta	andard Task Maintenanc	e	- 🗆 X
Course Level Tasks Delegate	evel Tasks.		Name	Description	In Use 🔺	Update.
Task	Days	Added	ADVANCED DRIVE	Advanced Driving	R	Close
Bring Appropriate Equipm	. 7	Before	CSS	Customer Service Skills	⊠	Close
Wear Suitable Clothing	7	Before	FAID	First Aid		
			FL1	Fork lift	M	
			FL2	Fork Lift Refresher	M	
			H&S	Health & Safety	2	Add to All
Add	Update	Delete				
ОК	Cance	el Help				

There is also the option to 'Add to All' which will allow you to set standard delegate/course tasks to all standard courses.



Training Status

This section allows a user to apply a status to a course or delegate.

• Select 'Training Status'

The Training Status dialogue box will appear allowing the user to define a status and the outcome of that status.

•	Dashboard	 ×
Training System Setup		
Qualifications	Course Level Tasks	
Budgeting	Delegate Level Tasks	
Training Provider	Standard Task	
E Courses	Training Status	>
BC Standard Training Need	Training Documents	
Training Needs Profiles		
Back		

Select add



• Select ok



Training Documents

This area will allow a user upload our training documents which you can then use to mail merge against an employee record.

•	Dashboard	- 🗆 X
Training System Setup		
Qualifications	Course Level Tasks	
Budgeting	Delegate Level Tasks	
Training Provider	Standard Task	
Ecourses	Training Status	
BC Standard Training Need	Training Documents	
Training Needs Profiles		
Back		

- Select 'Training Documents'
- Select 'Add' and provide the template with a name.

	Training Documents	– 🗆 X
	Document Group: < <all>></all>	Add
	Document Group	Edit
	Training Day Invite Training	Сору
Sta	ndard Document X	Delete
Please enter the name below standard document you are be shown in the list of stand creating new documents ag	w you would like to give to the creating. This is the name that will and documents to use when ainst an employee.	
Standard Document Name:	Forklift Cert	
Group:	Training	
		Close



A new dialog box will open. Here the user can create a new document or browse to the location the documents is saved.

	Training Documents	- 🗆 ×
	Document Group: < <all>></all>	Add
	Document Group Training Day Invite Training	Edit
	Insert Object	
Create New Create from File	Object Type: Adobe Acrobat Document Microsoft Equation 3.0 Microsoft Graph Chart Microsoft Office Excel Chart Microsoft Office Excel Worksheet Microsoft PowerPoint Presentation Microsoft PowerPoint Slide Microsoft Visio Drawing	
Result Inserts into yo	a new Adobe Acrobat Document object ur document.	Close

Now we will look at scheduling a course select the back button from the dashboard



• D	Pashboard – 🗆 🗙
Training System Setup	
Qualifications	Course Level Tasks
Budgeting	Delegate Level Tasks
Training Provider	Standard Task
E Courses	Training Status
BC Standard Training Need	Training Documents
Training Needs Profiles	
Back	

Scheduling a Training Course

This is an area where a user will book and schedule your employees onto their courses.

Select Schedule Training Course to view the options to select. A Standard Course will pull through from the system setup; alternatively if it is a Non-standard course select the Non- Standard Course Section.



•	Dashboard	- □ ×
Training Manager		
X System Setup		Task Summary
Schedule Training Course	>	12 URGENT TASKS
Course Maintenance		0 UPCOMING TASKS 210 FUTURE TASKS
Course Diary		
Q Manage Delegates		
Reports		
Back		

• Select schedule a training course

e	Diary Training	Course – 🗆 🛪	×
 Standard Course: 	Standard Course Course Code: Description:	Advanced Driving	
Non-Standard Course:	Non-Standard Co Course Code: Description:	Conference	
	< Back	Next > Cancel Help	

• Select next



Diary Training	g Course	-		_
Details: Start Date: 09/07/2015 Duration: 1 End Date: 09/07/2015 Start Time: 00:00 End Time: 00:00 Trainer Name: Jim Tumer Provider Name: Open College • Expiry Date: Status: Scheduled •	Location: Administration: Maximum Places: Minimum Places: CPD Hours:	 External Internal Show on Web 10 3 0:00 CPD Accredited 	•	

Select next to go to the 'Details' tab to then enter the location, date and maximum/minimum number of places for the course etc

- Finish
- A further option will appear

Diary 1	Fraining	Course		_ □	×
Details:	mply Pe	clocation:		x	
Course has been diaris details for this course?	ed succes	sfully, do you wish to	o enter additiona	I	
		Yes	No		
Jim Tumer		Minimum Places:	9		
Provider Name:		CPD Hours:	0:00		
Open College	-		CPD Accred	ited	
Expiry Date:					
Status: Scheduled	-				
	< Back	Finish	Cancel	Help	

• Select yes the course maintenance section will now open



Course Maintenance

The user can now detail various aspects of the course and maintain the location, dates, time etc. The status of the course can be changed or re-scheduled delegates can be added to the course or perhaps the waiting list costs can also be recorded.

• Utilise the tabs on the side to navigate

<u>Main</u>

This tab will allow a user to reschedule a course, change the status of a course or delete a course.

The change status will also allow you to mass update delegates as completed, cancelled etc.



The user can change the status on this page for all delegates at once, highlight single lines to change to another status.



	Course Maintenance, ADVAN	CED DRIVE - 09/07/2015	×	
	Main Details Provider	_ Timina:	L URGENT TASKS	
	Course Code: ADVANCED DRIVE	Start Date / Time: 09/07/2015 00:00	Booking Details	
	Description:	Duration: 1	Max Places: 0	
Course Details	Advanced Unving		Course Status	x
	Status: Scheduled			
Course:	Change Status	Course Code Description	Start Date End Date	Status OK
Advanced Driving		ADVANCED D Advanced Driving	09/07/2015 09/07/2015	Completed Cancel
Start Date: 09/07/2015	Delete Course	23 biown, James		Completed
End Date: 09/07/2015		- 10 Cockrill.Lovd		-Scheduled
Duration: 1.00		40 Colins,Sam		Completed
Course				
Delegates				
Administration				
Documents				
Other				
	·			

Details

This section allows a user to change the number of places available on the course enter notes or specify CPD hours

٠	Course N	laintenance, ADV	ANCI	ED DRIVE - 09/07	7/2015	-	
Course Details Course: Advanced Driving Start Date: 09/07/2015 End Date: 09/07/2015 Duration: 1.00 Course Delegates Administration Documents	Main Details Provi Location:	 External Internal Show on Web 10 \$ 9 \$ 0:00 CPD Accredited 	•	Details: Trainer Name: Jim Tumer Type: Notes: Expiry Date: Colour:	Standard	I URGENT TASKS Booking Details Max Places: Min Places: Booked: Cost Summary Delegates: Course: Total:	10 9 0.00 0.00 0.00
Other						View Delegat Add Delega Training Dia Holiday Plant	ies te ry ner



Show on web will display this course on the Self Service system to allow employees to request to go onto the course.

<u>Provider</u>

This section will detail the Training providers contact name, address etc.

•	Course Maintenance, ADVANC	CED DRIVE - 09/07/2015	- 🗆 🗙
Course Details Course: Advanced Driving Start Date: 09/07/2015 End Date: 09/07/2015 Duration: 1.00	Main Details Provide Provider: Provider Name: Open College Contact Name: May Piersly Telephone: 07864 675 3564 Fax: Email: MayP@opencolle	Address:	URGENT TASKS Booking Details Max Places: 10 Min Places: 9 Booked: 0 Cost Summary Delegates: 0.00 Course: 0.00 Total: 0.00
Course Delegates Administration Documents Other			View Delegates Add Delegate Training Diary Holiday Planner



Delegates

It is here where the user will begin to enter delegates onto the course. Selecting 'Add' at the bottom of the page to open the employee search function allowing you to filter down by department position of even their training needs.

• Select the delegates tab from the side bar

٠	Course	e Maintenance, ADV	ANCED DRIVE -	09/07/2015			- x
		g List				L URGENT TASK	s
	Employee ID	Employee Name	Status	Location	Departn	Booking Details	
		There a	e no items to show.			Max Places:	10
Course Details						Min Places: Booked:	9 0
Course: Advanced Driving						Cost Summary	
Start Date: 09/07/2015						Delegates:	0.00
End Date: 09/07/2015						Course:	0.00
Duration. 1.00						Total:	0.00
Course							
Administration							
Documents							
Other						View Delega	ites
	4	Ш			•	Add Delega	ite
	Email		Add	Details	Delete	Training Di	ary
						Holiday Plan	iner

- Select add
- Search for the delegates for the course, searching by training needs can also be used



ployee Search Employee Tree						
	Search	n Results:				
Training Need:	ID	Surname 🛆	Other Names Δ	Department	Location	
-	1	Abbott	Albert	Management	London	
	2	Adams	Matthew	Sales	London	
status:	25	Ainsworth	Julie	Sales	London	
Status: Target Date Between: and	26	Alcock	Vicky	Sales	London	
Formet Date Between:	3	Bathley	Catherine	Management	London	
Target Date Between:	4	Beasley	James	Management	London	
and	29	Brown	James	Production	London	
	32	Burton	Domonic	Production	Leeds	
	27	Butler	Adam	Production	London	
	30	Clark	Simon	Production	London	
	10	Cockrill	Loyd	Production	London	
	40	Colins	Sam	Administration	Birmingham	
	5	Cooke	Jenny	Accounts	London	
	15	Cooper	Rodger	Production	Leeds	
/lain	17	Eden	John	Production	Leeds	
	11	Emmerson	Kieth	Sales	London	
ate	18	Empson	Phillip	Production	Leeds	
Vork	13	Falkner	Sam	Production	London	
	31	Glover	Jane	Sales	London	
Dept/Loc	19	Graham	Jane	Administration	Leeds	
	10	1.00	C	A	1	

Either double click on the employee record or press select to book an employee onto the course. Multiple delegates can be added by pressing CTRL on your keyboard and selecting the other delegates.

To change the status of a delegate double click into their delegate account you will see a status drop down this will be covered in the delegate maintenance section of the document.



٠	Cours	e Maintenance, AD	ANCED DRIVE -	09/07/2015		-	□ ×
	Delegates Waitin	ng List				L URGENT TASKS	
	Employee ID	Employee Name	Status	Location	Departn	Booking Details	
	29	Brown, James	Scheduled	London	Product	May Disease	10
	27	Butler, Adam	Scheduled	London	Product	Max Places:	10
Course Details	40	Colins, Sam	Scheduled	Birmingham	Adminis	Min Places:	9
Course:	17	Eden, John	Scheduled	Leeds	Product	Booked:	4
Advanced Driving						Cost Summary	
Start Date: 09/07/2015						Delegates:	0.00
End Date: 09/07/2015						Course:	0.00
Duration: 1.00						Total:	0.00
Course							
Delegates							
Administration							
Documents							
Other						View Delegat	es
	4				۲	Add Delegat	e
	Email		Add	Details	Delete	Training Dia	Y
						Holiday Plann	ier

Waiting List

Although you may have specified there is a maximum number of places on a course you can enter employees who have requested to go onto the course into a 'Waiting List'

If an employee from the 'Delegates' list cannot attend the course simply select the employee from the waiting list and 'Move ' them to the delegate list.

4	Course Maintenance, ADVANCED DRIVE - 09/07/2015	– 🗆 🗙
	URGENT TASKS	
Course Details	Employee ID Employee Name Date Added Status Not 1 Abbott, Albert 03/07/2015 15:50:49 Waiting	Max Places: 10 Min Places: 9 Booked: 4
Course: Advanced Driving	Simply Personnel	Cost Summary
Start Date: 09/07/2015 End Date: 09/07/2015 Duration: 1.00	Are you sure you wish to move the selected employees from the waiting list to the delegates list?	Delegates: 0.00 Course: 0.00 Total: 0.00
Course Delegates	Yes No	
Administration		
Documents		
Other		View Delegates
		Add Delegate
		Training Diary
		Holiday Planner

• Select 'Add' and select the employee's name from the employee search as before



- A screen will appear to allow you to confirm you wish to move them to the delegates list from the waiting list.
- Click yes



On both the delegate tab and the waiting list tab you will see a delete function this will delete the employee completely from the course

<u>Costs</u>

This section will allow you to detail costs incurred by the course the user will have previously set this within the system setup. The system will then provide with a cost summary on the right hand side

• Select the administration tab from the side bar.

	Course Maintenance, ADVANCED DRIVE - 09/07/2015	– 🗆 X
Course Details Course: Advanced Driving Start Date: 09/07/2015 End Date: 09/07/2015 Duration: 1.00 Course Delegates Administration Documents	Costs Training Cost X Date Main Notes Cost Date 03/07/2015 Date: 03/07/2015 300.00 Description: Course Cost 300.00 Description: Course Cost Cost: 300 Budget Holder: Karren Jones Budget Type: Training Facilities Analysis Code 1: Equipment Analysis Code 2: NA OK Cancel Help	URGENT TASKS Booking Details Max Places: 10 Min Places: 9 Booked: 4 Cost Summary Delegates: 0.00 Course: 300.00 Total: 300.00
Other	Total Course-Level Costs: 300.00 Add Update Delete Total Delegate-Level Costs: 0.00 Total Costs: 300.00	View Delegates Add Delegate Training Diary Holiday Planner

- Select Add
- Enter the details of the cost
- Select ok

Version 1 Training Manager



Course Maintenance, ADVANCED DRIVE - 09/07/2015						×
Costs Tasks Qualifications					L URGENT TASKS	
Date Cost Type	Des	cription		Cost	Booking Details	
03/07/2015 Delegate Cost	2 Cou	ırse		300.00	Max Places:	10
					Min Places:	9
					Booked:	4
					Cost Summary	
					Delegates:	0.00
					Course:	300.00
					Total:	300.00
Total Course-Level Costs:	300.00	Add	Update	Delete	View Delega	ites
Total Delegate-Level Costs:	0.00				Add Delega	ate
I otal Costs:	300.00				Training Di	ary
					Holiday Plar	iner
	Course Maintena Costs Tasks Qualifications Costs: Date Cost Type 03/07/2015 Delegate Cost 33/07/2015 Delegate Costs: Total Course-Level Costs: Total Delegate-Level Costs: Total Costs:	Course Maintenance, ADVANC Cots: Tasks Qualifications Date Cost Type 03/07/2015 Delegate Cost Cotal Course-Level Costs: 300.00 Total Course-Level Costs: 0.00 Total Costs: 0.00	Course Maintenance, ADVANCED DRIVE - 0 Cots: Tasks Qualifications Cods: Date Date: Cost Type Date: Description 03/07/2015 Delegate Cost Course-Level Costs: 300.00 Total Course-Level Costs: 0.00 Total Costs: 300.00	Course Maintenance, ADVANCED DRIVE - 09/07/2015 Cots: Tasks Qualifications Cods: Date Date Cost Type Date Course	Course Maintenance, ADVANCED DRIVE - 09/07/2015 Cods: Date Cost: 03/07/2015 Delegate Cost Course 300.00 Total Course-Level Costs: 300.00 Add Update Delete Total Costs: 300.00 Add Update Delete	Course Maintenance, ADVANCED DRIVE - 09/07/2015 - Cotts Tasks Qualifications Date Cost Bocking Details D3/07/2015 Delegate Cost Course D3/07/2015 Delegate Cost Course Date Cost Cost Date Cost Cost Date Cost Cost D3/07/2015 Delegate Cost Course Date Course 300.00 Total Course-Level Costs: 300.00 Add Update. Delete Total Course-Level Costs: 300.00 Add Update. Delete Add Delegate Total Costs: 300.00 Add Update. Delete Add Delegate

<u>Tasks</u>

This section may already list tasks if you have linked them via the system setup however you can add tasks to the course at this stage

• Select 'Add' and enter the date for the task to appear and the tasks type.



- To close double click
- Tick close



Click ok

	Course Task	x
Main Notes		
Details:		
Task Date:	19/06/2015	
Task:	Book Equipment	•
	Closed	
Date Closed:		
	OK Cancel	Help

Qualifications

This section may already detail a qualification if they have been linked to the course within the system set-up, if not the can be entered on at this stage.

- Select add
- Enter the qualification details
- Select ok



٩		Course Mainte	enance, ADVANCED DRIVE	- 09/07/2015		-	- 🗆 X
		Costs Tasks Qualification Qualifications: Qualification NA	Subject Fork Lift Truck Driving	Grade Pass	E	URGENT TASK Booking Details Max Places:	:s 10
Course D Course: Advanced Start Date End Date: Duration: Course Delegate: Administ Documen	Qu Details: Qualification: Subject: Grade: Establishment: Notes: Expires In:	NA Fork Lift Truck Driving				Min Places: Booked: Cost Summary Delegates: Course: Total:	9 4 0.00 300.00 300.00
Other		OK	Cancel Add	Update	Delete	View Delega Add Delega Training Di Holiday Plar	ates ate ary nner



Documents

A user can browse to their machine and save a document using the 'Insert' link from, alternatively if you have already set a template within the System Setup utilise 'Std Doc' link to select your template.

• Select the documents tab form the side menu.

		Course Docume	nt 🗶
Course Details Course: Advanced Driving Start Date: 09/07/2015 End Date: 09/07/2015 Duration: 1.00 Course	Course Maintenance, ADV Documents Documents Course Group: < <all>> Date Created Description There a</all>	Please Select A Document Training Training Day Invite To add a document, select the desired template from above then specify a new name for the document and above the Specify a new name for the document and above the specify a new name for the document and above the specify a new name for the document and above the specify a new name for the document and above the specify a new name for the document and above the specify a new name for the	III C C C C C C C C C C C C C C C C C C
Delegates Administration Documents Other	<	New Document Name: Training Day Invite	Cancel Help
	Std Doc Inser	Properties Activate Delete	Training Diary Holiday Planner

• Select browse to locate a document from another location

•	Course Maintenance, ADVANCED DRIVE - 09/07/2015	– 🗆 X
	Documents Documents: Document Group: Quert Group: Created Description Group Uniked 03/07/2015 Training	URGENT TASKS Booking Details Max Places: 10 Min Places: 9
Course Details	Insert Object 🗶	Booked: 4
Advanced Driving Start Date: 09/07/2015 End Date: 09/07/2015 Duration: 1.00 Course Delegates Administration Documents	Create New File: Cryogram Files (x86)\Simply Personnel Create from File Frowsee Link Result Inserts the contents of the file as an object into your document so that you may activate it using the program which created it.	Cost Summary Delegates: 0.00 Course: 300.00 Total: 300.00
Other	Std Doc Insert Properties Activate Delete	View Delegates Add Delegate
		Training Diary Holiday Planner



Quick Links

A user can view the training diary from here by selecting 'Training Diary' this will open a month view of booked courses.

Delegates can also be added to the course or look at a monthly breakdown of holidays with the holiday planner

•	Course	Maintenance, ADVAN	CED DRIVE - 09/07/20	15	_ □	×
Course Details Course: Advanced Driving Start Date: 09/07	/2015	ADVANCED DRIVE G G G G G G G G G G G G G G G G G G	Timing: Start Date / Time: 09/07 Duration: 1 End Date / Time: 09/07 Resch The Course can be resche button above. If the Start f	7/2015 00:00 7/2015 00:00 edule duled using the Date is changed	URGENT TASKS Booking Details Max Places: Min Places: Booked: Cost Summary Delegates:	000
End Date: 09/07 Duration:	/2015 1.00		then the date on all outstar similarly changed.	nding tasks will be	Delegates: 0 Course: 0 Total: 0	0.00 0.00 0.00
Delegates Administration Documents Other					View Delegates Add Delegate Training Diary	
۲		Course	Diary		-	- = >
Show Course: Course Code: < <all>> Description: <<all>></all></all>	Show Courses Within Date Range: Start Date: 03/07/2014 End Date: 03/07/2016	io to Date: Show Weeks: 5 *	View Details Print Options			
	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN	
29 June	30	1 July	2	3	4 5	
6	7	8	9 ADVANCED DRIVE;	10	11	
13	14	15	16	17	18	

21

28

20

23

30

24

31

25

26

1 August

22

29



Delegate Maintenance

The Delegates tab allows a user to open a separate record that relates to the delegates themselves. Simply double click the delegate record from the course delegate tab to open.

The 'Main' tab will detail their Employee ID, name and the course they are scheduled on.

The status selection allows the stage to be stated i.e. scheduled, did not attend completed.





<u>Costs</u>

The Costs tab allows a user to detail any costs the delegate may incur, this will provide a course cost and delegate expenses breakdown.

Select 'Add' and complete the necessary fields.

e 🕘 De	legate Place M	aintenance,	29 - Brow	n,James - 09	/07/2015 - ADVA	ANCED DRIVE		– 🗆 🗙
	Main Costs Costs:	Tasks						ASKS
	Date	Cost Type		Description		Cost	Delegate De	tails
			There a	are no items to s	how.			
Jamos Prown							Status:	
Factory Operative							Scheduled	
Production								
London							Course Sum	mary
Reports To:							Course:	
							ADVANCED DR	RIVE
Delegate							Start Date:	09/07/2015
Delegate							End Date:	09/0//2015
Documents							Duration:	1.00
Other								
								- 01
							Trainir	ig Diary
	Total Delega	te-Level Costs:	0.00	Add.	. Update	Delete	Holiday	Planner
							Course	Details

Hints and Typs

A cost summary will appear in delegate expenses and course expenses.

0.00
100.00
100.00



<u>Tasks</u>

If tasks have previously been linked via the system setup they will appear here. Otherwise you can add tasks to the delegate at this stage.

el 🕘 Del	egate Place Maintenance, 29 - Brown,James - 09/07/2015 - ADVANCED DRIVE	– 🗆 🗙
James Brown Factory Operative	Main Costs Tasks Tasks: Tasks Notes 30/06/2015 Wear Suitable Clothing 30/06/2015 Bring Appropriate Equipment	FUTURE TASKS Delegate Details Status: Scheduled
Production London Reports To:		Course Summary Course: ADVANCED DRIVE Start Date: 09/07/2015
Delegate Documents Other		End Date: 09/07/2015 Duration: 1.00
	Add Update Delete	Training Diary Holiday Planner Course Details

These will also appear within the task list when the user logs in.

Task List					Ψ×
Personnel 🛕 Trainir	ng 🛕 Recruitment				
Task Date 🛆	Task 🛆	Course Code 🛛 🛆	Description	Employee 🛆	
6	Training Need Target Date	ADVANCED DRIVE	Driving skills	Brown, James	
0	Training Need Target Date	ADVANCED DRIVE	Driving skills	Burton, Domonic	
C	Training Need Target Date	ADVANCED DRIVE	Driving skills	Butler, Adam	
e	Training Need Target Date	ADVANCED DRIVE	Driving skills	Clark, Simon	
O	Training Need Target Date	ADVANCED DRIVE	Driving skills	Cockrill, Loyd	
0	Training Need Target Date	ADVANCED DRIVE	Driving skills	Cooper, Rodger	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Eden, John	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Empson, Phillip	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Falkner, Sam	
0	Training Need Target Date	ADVANCED DRIVE	Driving skills	Idle, Mike	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Jackson, Simon	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Jagger, Roy	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Kelly, Jeremy	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Knox, Jeff	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Leason, Ralph	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Moss, Gareth	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Part, Edward	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Porter, Percy	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Roper, Ben	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Simpson, Daniel	
Θ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Smith, John	
Θ	Training Need Target Date	CSS	Customer Service Skills	Adams, Matthew	
0	Training Need Target Date	CSS	Customer Service Skills	Ainsworth, Julie	
0	Training Need Target Date	CSS	Customer Service Skills	Alcock, Vicky	
Θ	Training Need Target Date	CSS	Customer Service Skills	Colins, Sam	
<u> </u>	Training Need Target Date	CSS	Customer Service Skills	Cooke, Jenny	•
Print Exp	ort			Email Edit Delete Select	Close



Documents

Within the delegate Documents tab a user can attach documents. Alternatively select 'Std Doc' to allow you to select an already set template.

There is also an 'email' function where a user can select an existing email template previously created from Personnel Manager.

To open documents select Activate.

) D	elegate Place Mainte	nance, 29 - Brown,Jame	es - 09/07/2015 - AD	VANCED DRIVE		– 🗆 🗙	
	Documents						
	Documents:				FOTOKE II	ASKS	
	Document Group:	< <all>></all>	•		ologato Dot	nile	
	Date Created	Description	Group	Linked	velegate Det		
James Brown	03/07/2015	Training Day Invite	Training	S	tatus:		
Factory Operative				S	cheduled		
Production							
London				C	ourse Sumn	nary	
Reports To:				С	ourse:		
				A	DVANCED DR	IVE	
Delegate				S	tart Date:	09/07/2015	
Delegate				E	nd Date:	09/07/2015	
Documents					uration.	1.00	
Other							
	4			• •	Trainin	g Diary	
	Std Doc	Insert Email	Properties Activate	Delete	Holiday	Planner	
					Course	Details	
					course		
Inserting a docume	ent:				\		1
			\	$\langle \rangle$	To de	lete the	
Select Inse	rt		\		docur	ment	
						nem	
Browse to	the document		$\langle \rangle$	$\langle \rangle$			-
 Click ok 			\		-		
 Enter a des 	scription for the	e document	\			en the docur	nent.
		uocument	\				
Evicting tomplate			<u>} </u>				
Existing template			1	/iew the propert	ties of 🛛		
	_		+	he document			
 Select Std 	Doc						
Select the	template						
	•						

• Click ok



Reports & Simply Answers

This section of the software allows users to report on courses scheduled already passed, delegates attending etc. There are cost summary reports and budget analysis reports.

• Select reports from the Main Dashboard.

•	Dashboard – 🗆 🗙
Training Manager	
🔀 System Setup	Task Summary
Schedule Training Course	🔔 2 URGENT TASKS
Course Maintenance	0 UPCOMING TASKS 7 FUTURE TASKS
Course Diary	
Q Manage Delegates	
Reports	>
Back	

• Select the a report

	Dashboard					
Training Reports						
Employee Training	Administration Reports					
Training Details	Standard Courses					
Training Needs	Course Booking					
Qualifications	Training Budget					
Skills Matching	Cost Analysis Summary					
CPD	Cost Details					
	Course Delegates					
	Standard Training Needs					
Back	Simply Answers					



- Select print to display as below
- Select export to extract to a CSV file



Simply Personnel Demo Standard Courses Report

Course Code	Description	Administration	Provider	Trainer Name	Duration	CPD Hours	CPD Accredited
ADVANCED DRIVE	Advanced Driving	External	Open College	Jim Turner	1.00	0:00	No
CSS	Customer Service Skills	External	Excellence in Training	Linda Hardy	1.00	0:00	No
FAID	First Aid	External	Excellence in Training	Jenny Arginsaw	1.00	0:00	No
FL1	Fork lift	External	Train with Ease	Gary Sanderson	1.00	0:00	No
FL2	Fork Lift Refresher	External	Train with Ease	Gary Sanderson	1.00	0:00	No
H&S	Health & Safety	External	Time2Train	Craig Stain	1.00	0:00	No
нн	Hard Hats	External	Train with Ease	Mark Dupy	1.00	0:00	No
IND	Induction	Internal		Amanda Lakeland	1.00	0:00	No
MS	Microsoft Office Skills	External	Open College	Julie Sanderson	1.00	0:00	No
PM	Project Management	External	Train with Ease	Harriot Jesson	1.00	0:00	No
TELSKIL	Telephone Skills	External	Time2Train	Jade Brigg	1.00	0:00	No

Page 1 of 1 03/07/2015



Simply Answers

If you cannot locate a report that you require select Simply Answers. Users can define what fields to report on.

- A separate page will open select
- New Query top proceed to building your report.
- Expand the Employee Section to allow you to double click fields from their employee record:
- Simply double click the field you would like to extract data from and the system will place a green tick next to the field to show it has been included.



• 'Run Query' to generate the report.



Simply Answers

File Query Help				Bell of a little	10 5 101			
Run Query 📄 New Query	Load	Query From DB 🍪 Print 🚺	Export To Excel	Chart Lo	ad Query From Web	Nave Query 🛒	Delete Existing Query	Query Options*
± Employee	Drag a	column header here to group	by that column.					
E-Training		Err In Course Code Err				Einsteinen State		
Diarised Courses	empid	ΣΥ +P Course Code ΣΥ	-P Description 2	V-P Start Date 2	T-P Surname ∑ V	P Firstname 2 V H	Department ∑ ∨ +	Location 2 V
⊡ Tasks	999	70-680	Windows 7	29/10/2014	Benton	Donald	Customer Services	Head Office
⊞Costs	999	ILM	ILM	05/11/2014	Benton	Donald	Customer Services	Head Office
Documents	68	70-680	Windows 7	11/11/2014	Blalock	Katie	Development	Head Office
Qualifications User Defined Details	68	70-680	Windows 7	17/12/2014	Blalock	Katie	Development	Head Office
🗄 User Defined List Detail	10	11 M	11.54	05/11/2014	Deswall	Magazinita	Administration	04.05
User Defined List Detail	19	ILM	ILM	05/11/2014	Boswell	Marguerite	Administration	QA UTICE
. User Defined List Detail	86	70-680	Windows 7	29/10/2014	Bowles	Karen	Quality Assurance	QA Office
- Course Code	11	70-680	Windows 7	17/12/2014	Briggs	Albert	Sales	Head Office
	34	ILM	ILM	05/11/2014	Buchanan	Hilda	Administration	Head Office
Start Time	34	70-680	Windows 7	17/12/2014	Buchanan	Hilda	Administration	Head Office
- End Date	22	70 000	Mindows 7	11/11/2014	Casaa	Cassas	Administration	Head Office
Duration	33	70-680	Windows 7	11/11/2014	Cannon	George	Administration	Head Office
Internal	33	70-680	Windows 7	27/08/2014	Cannon	George	Administration	Head Office
Provider	93	70-680	Windows 7	29/10/2014	Cannon	Melvin	Marketing	Head Office
Maximum Places	93	70-680	Windows 7	27/08/2014	Cannon	Melvin	Marketing	Head Office
Minimum Places	28	ILM	ILM	05/11/2014	Carter	Terri	Customer Services	Head Office
Location	89	70-680	Windows 7	27/08/2014	Chan	Tracey	Development	Head Office
Notes	49	70-680	Windows 7	27/08/2014	Chappell	Billy	Sales	Head Office
Туре	20	Excel 2013	Excel 2013	28/11/2014	Coble	Jane	Administration	Head Office
CPD Hours	7	70-680	Windows 7	27/08/2014	Connolly	Dolores	Quality Assurance	QA Office
CPD Accredited	19	70-680	Windows 7	27/08/2014	Crabtree	Allison	Administration	Head Office
Show On Web	10	70-000	Vilidows /	2//00/2014	Crabblee	Allison	Administration	Tiead Office
⊡-Delegales ⊞-Tasks	18	Excel 2013	Excel 2013	28/11/2014	Crabtree	Allison	Administration	Head Office
⊞Costs	8	Excel 2013	Excel 2013	28/11/2014	Davis	Sherry	Administration	Head Office
Documents	45	Excel 2013	Excel 2013	28/11/2014	Drake	Charlie	Administration	Head Office
User Defined List Details	60	Excel 2013	Excel 2013	28/11/2014	Hunter	Susan	Administration	Head Office
⊞ - User Defined List Detail								
User Defined List Detail								
EmployeeID								
Notes								
· Status								
TNA Profile	SQL to	be used for this query:						
TNA Profile	SELECT	Employee empid DisriedCourse	CourseCode as "Cours	na Cada" DiariadCaur	. [Description] as "Des	orintian"		
⊟- I raining Need	DiariedC	Course. Start Date as "Start Date"	coursecoue as COU	se coue , planedCours	se [Description] as Des	copuoti ,		
I raining Need	Employe	e.sumame as "Sumame", Employ	vee.Firstname as "First	tname",				
Course Code	Employe	e lobs Department as "Departme	nt" Employee.lobs.l.o	cation as "Location"				

To export the report to Excel, select export to excel. To create charts ensure you have first run the query and then select Chart. Users can save the report template using the Save query function.

Selecting Load Query from web will take you to a list of additional reports.



Employee Training Maintenance

From the employee's record there are 3 tabs relating to the training module.

- Training/Qualifications
- Training Needs/Profiles
- CPD.

Training/Qualifications

View an employee's scheduled and completed courses and any qualifications.

Select details to bring up the details of the course. Delete will delete the course from the employee's record and remove them from the course.



To add new qualifications go to the qualifications section and select add. If an Expiry date is entered it will generate a task when the expiry date arrives.



٢	Employee Maintenance - 29		Course – =	x
	Training / Qualifications Training Needs/Profiles CPD Training: Tasks Date Course Duration 09/07/2015 ADVANCED DRIVE 1.00	 Standard Course: 	Standard Course: Course Code: ADVANCED DRIVE Description: Advanced Driving	
James Brown Factory Operative Production London Reports To:	Cualifications:	 Non-Standard Course: 	Non-Standard Course Course Code: Description: Conference	
Personal Work Attendance	Tasks Qualification Subject There are no item		< Back Next > Cancel Help	
Training / Qualifications Docs / Contracts Other		dd UpdateD	Record Absence Attendance Record Holiday Card Save Cancel	

'New' will allow the user to schedule the individual's record you are on onto a course

Standard course will allow the user to pick from the standard list from system setup

Non-standard course will allow you to set a non-standard course the user may have already scheduled previously.

	Co	urse Lookup			х		
Course Search							
	Search Result	s:				29 - Brown,James	– 🗆 ×
Course Code:	Date 🛆	Course Code 🛛 🛆	Description	Status		CPD	
•	26/08/2008	H&S	Health & Safety	Completed			URGENT TASKS
Description:	09/07/2015	ADVANCED DRIVE	Advanced Driving	Scheduled		tion CPD Hours Internal Status	Absences
•						0:00 🗹 Scheduled	
🗹 Internal							
🗹 External							
						•	Holidays
						Add Details Delete	
						Date Passed Grade Expiry	
						items to show.	Click the charts for more information
							Employment Calculator
							Book Holiday
Main							Record Absence
Date	Search Search	Select Close				•	Attendance Record
						Add Update Delete	Holiday Card
							Save Cancel



My Notes