

## Simply Personnel – Training Manager

Simply Personnel

### Login

Username:

Password:

Change Password:

[Login](#) [Cancel](#)

[www.simplypersonnel.co.uk](http://www.simplypersonnel.co.uk)

Simply Personnel 12.8.0.1

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-Training Workbook-

## **Objectives**

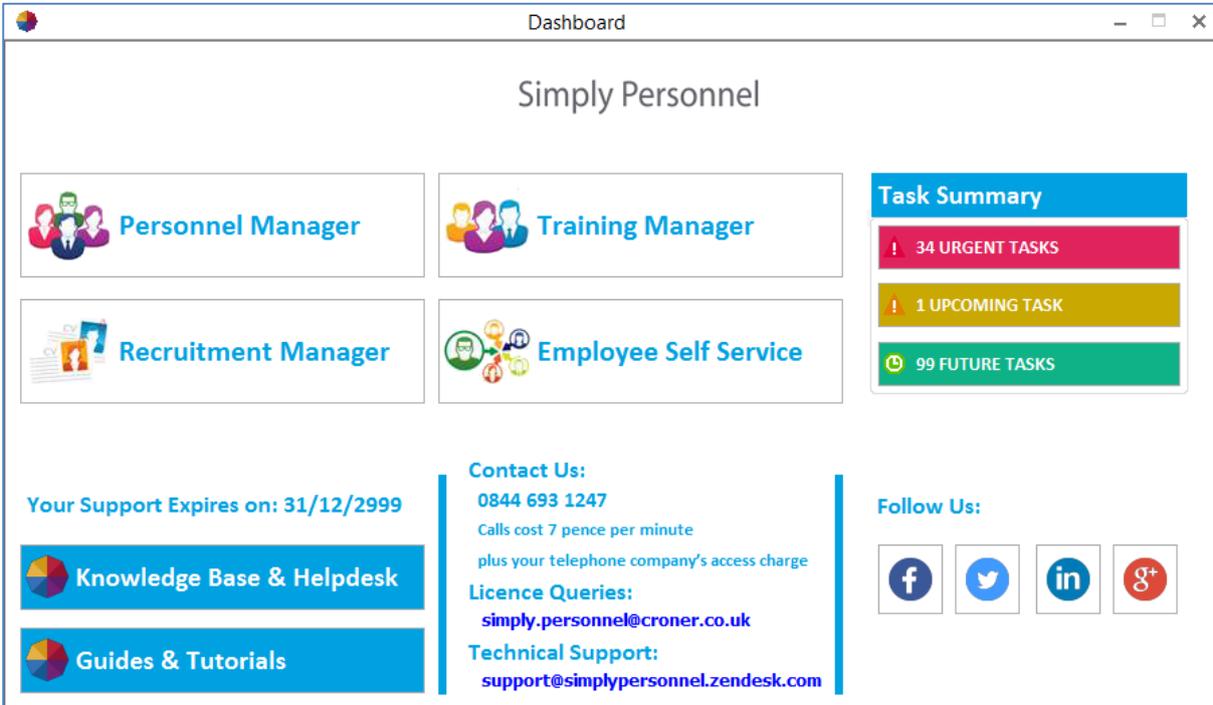
- Schedule, manage, monitor and maintain courses
- Book delegates onto courses
- Track qualifications
- Analyse budgets and cost breakdowns
- Track costs
- Set tasks to keep track of courses, delegates and qualification expiry dates
- Run , create and save reports
- Create mail merged document templates 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.

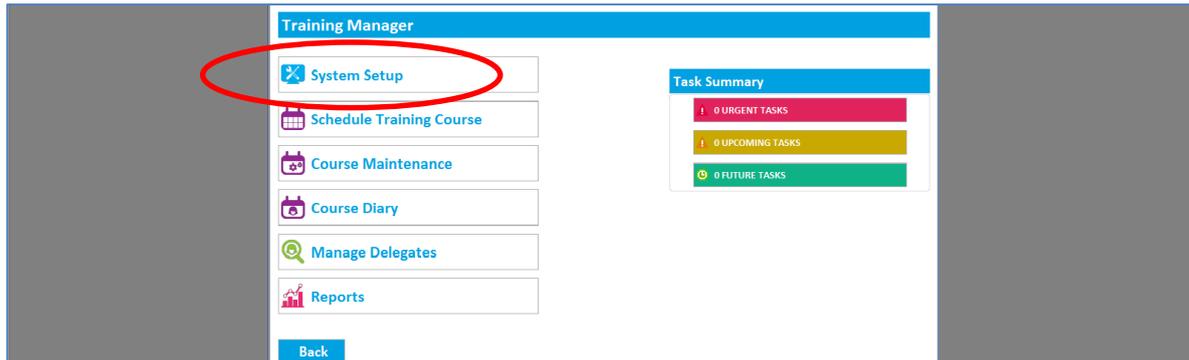


The screenshot shows the 'Simply Personnel' dashboard. At the top, it says 'Dashboard' in the window title bar. The main heading is 'Simply Personnel'. Below this, there are four main menu items: 'Personnel Manager', 'Training Manager', 'Recruitment Manager', and 'Employee Self Service'. To the right of these is a 'Task Summary' section with three bars: a red bar for '34 URGENT TASKS', a yellow bar for '1 UPCOMING TASK', and a green bar for '99 FUTURE TASKS'. At the bottom, there are three columns of information: 'Your Support Expires on: 31/12/2999' with links for 'Knowledge Base & Helpdesk' and 'Guides & Tutorials'; 'Contact Us:' with phone number '0844 693 1247', call cost information, and email 'simply.personnel@croner.co.uk'; and 'Licence Queries:' with email 'simply.personnel@croner.co.uk'; 'Technical Support:' with email 'support@simplypersonnel.zendesk.com'; and 'Follow Us:' with social media icons for Facebook, Twitter, LinkedIn, and Google+.

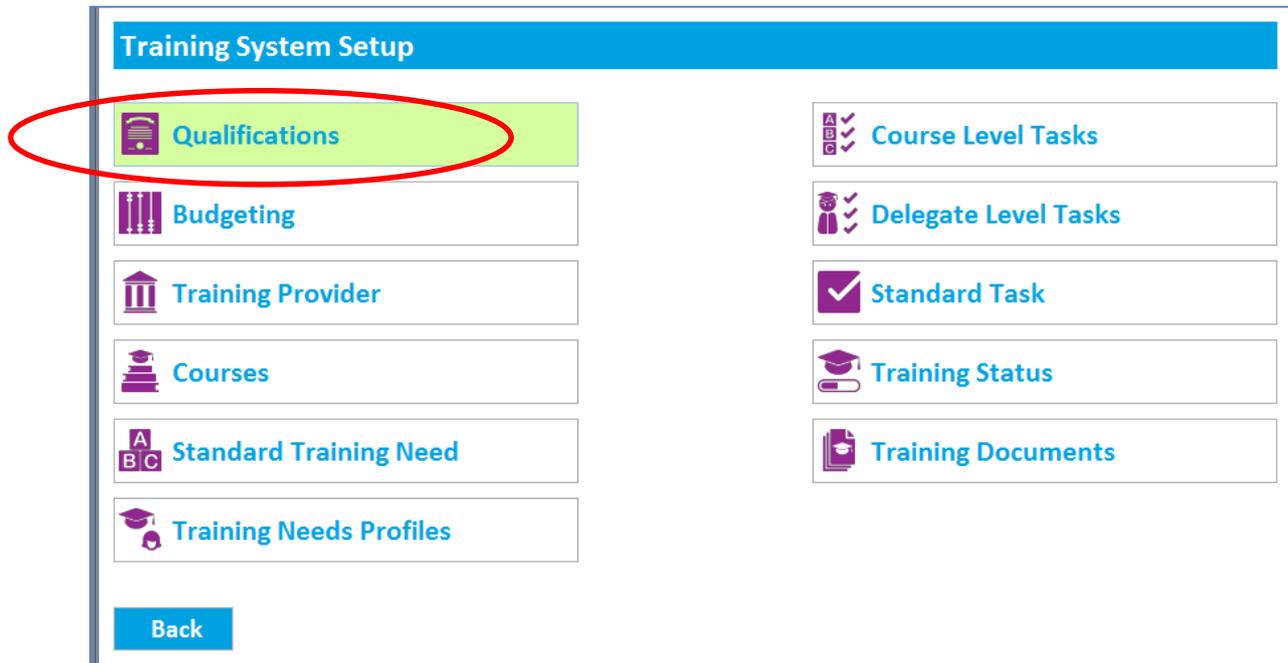
## System Setup

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



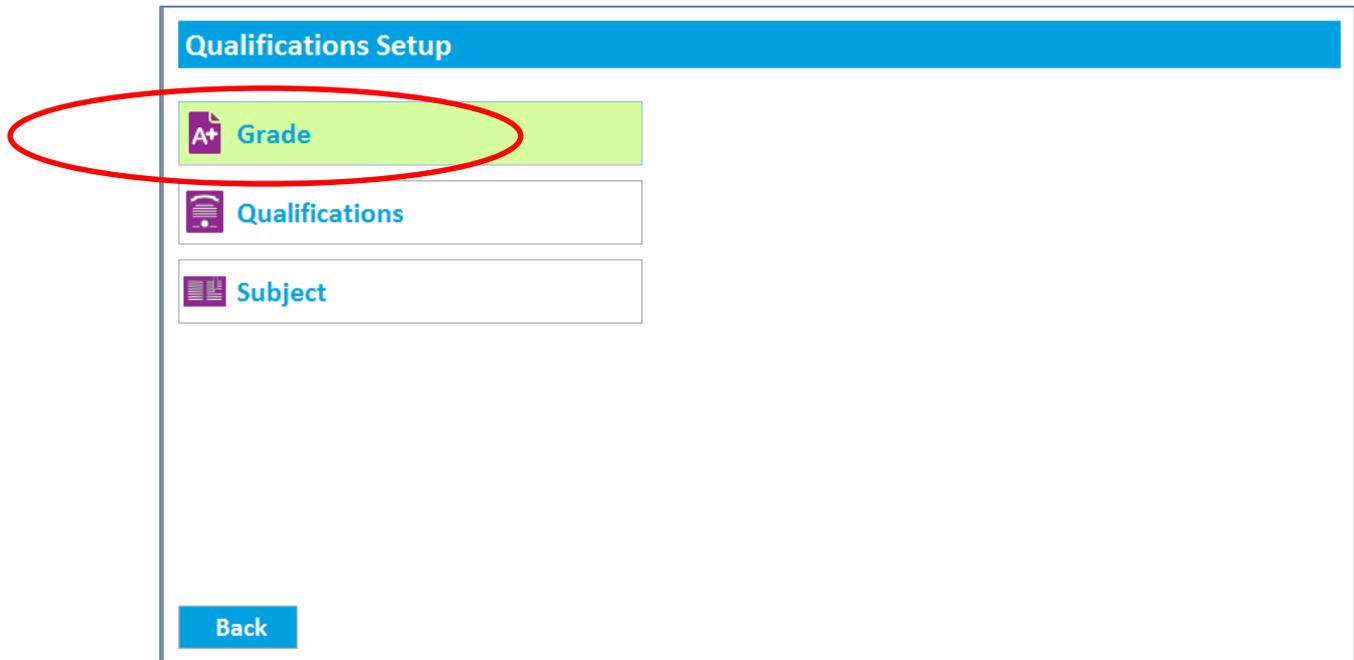
- The system will take the user to the system setup configuration table.



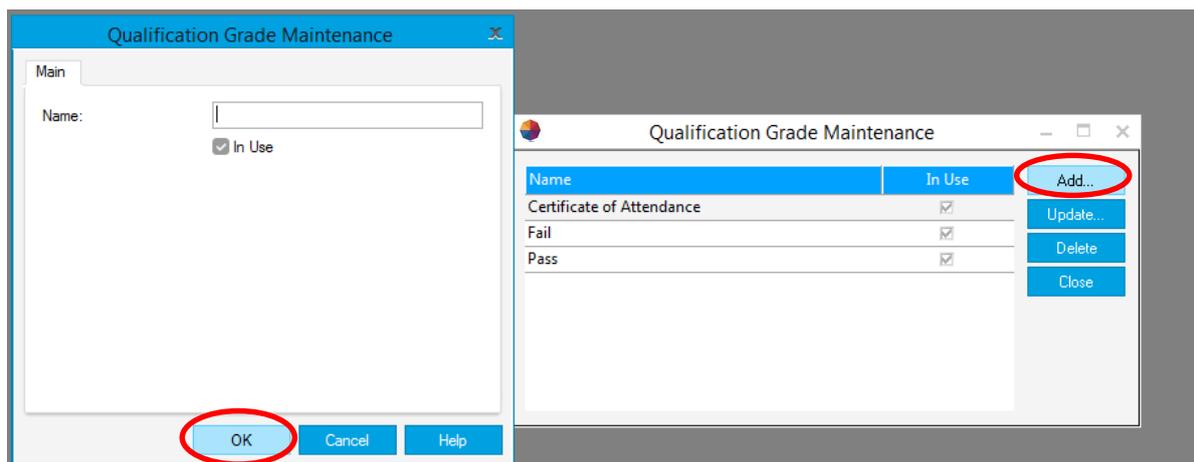
- Select qualifications

## 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.



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

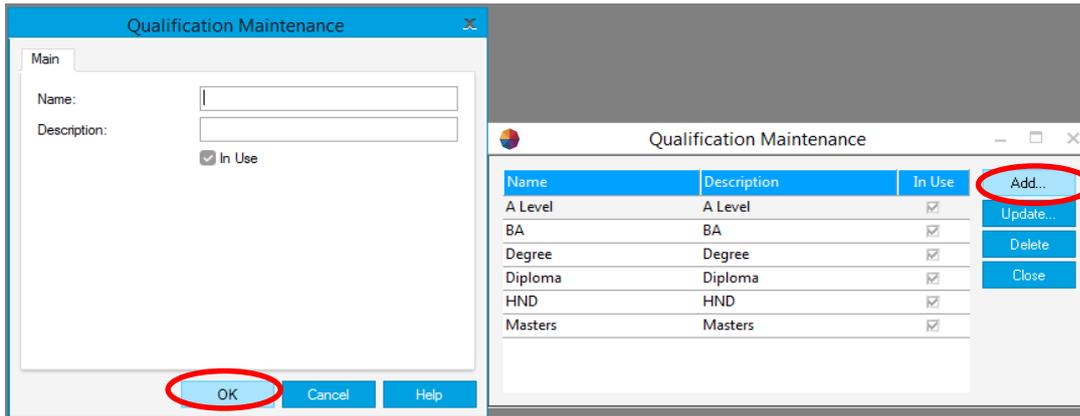


- To create a new grade, click on 'Add'
- Enter grade
- Click 'ok'

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'.

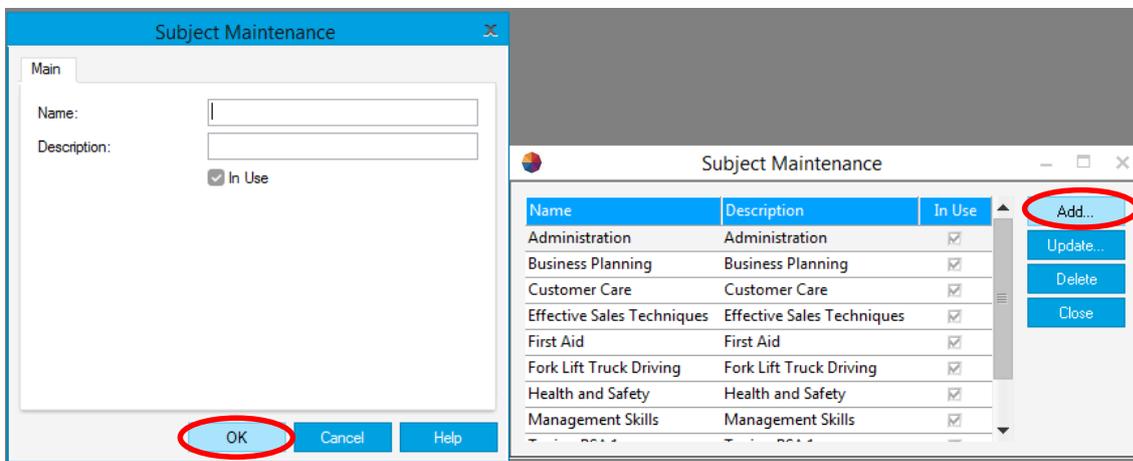


To create a new qualification;

- 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

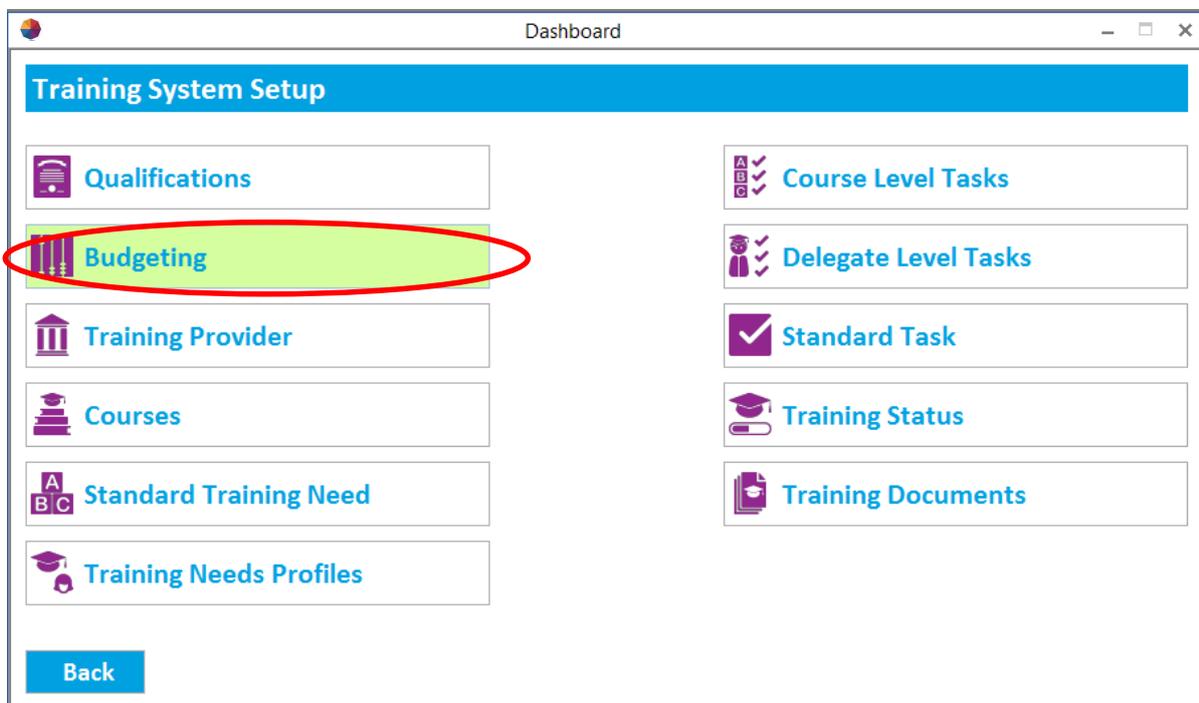
- Select Add
- Ok to save.



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

## **Budgeting**

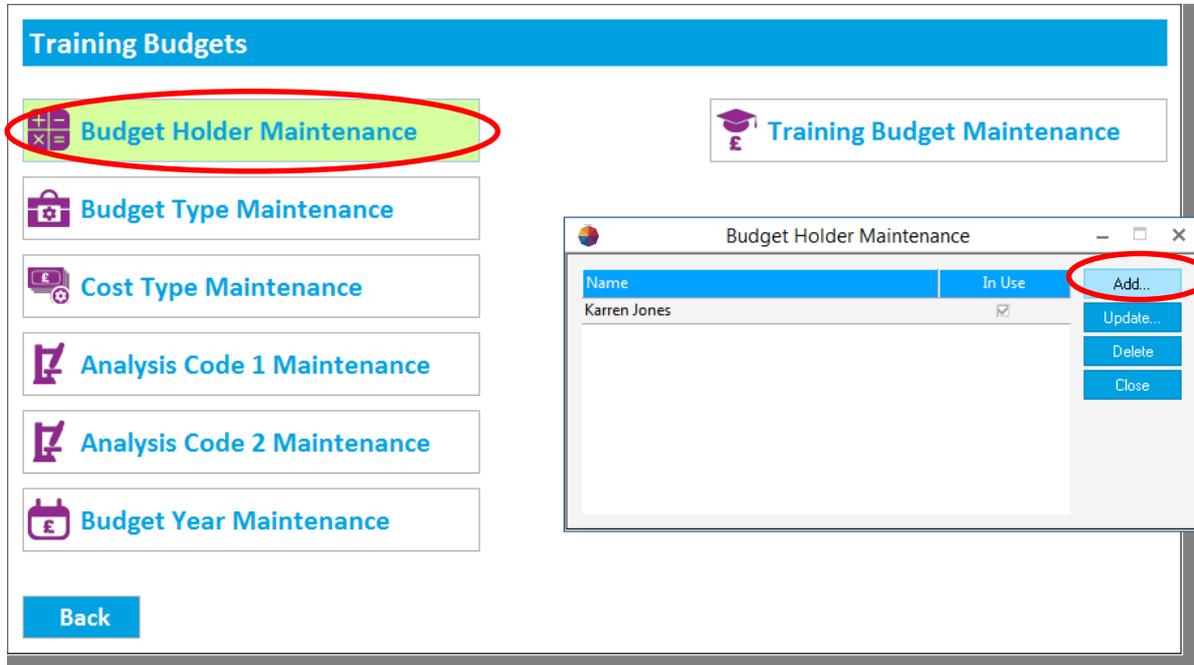
This area allows users to track and report on any costs that may have been incurred as a result of any training organised or completed. In order to track costs first define various aspects of the training budget. It allows the user to specify budget holders per department



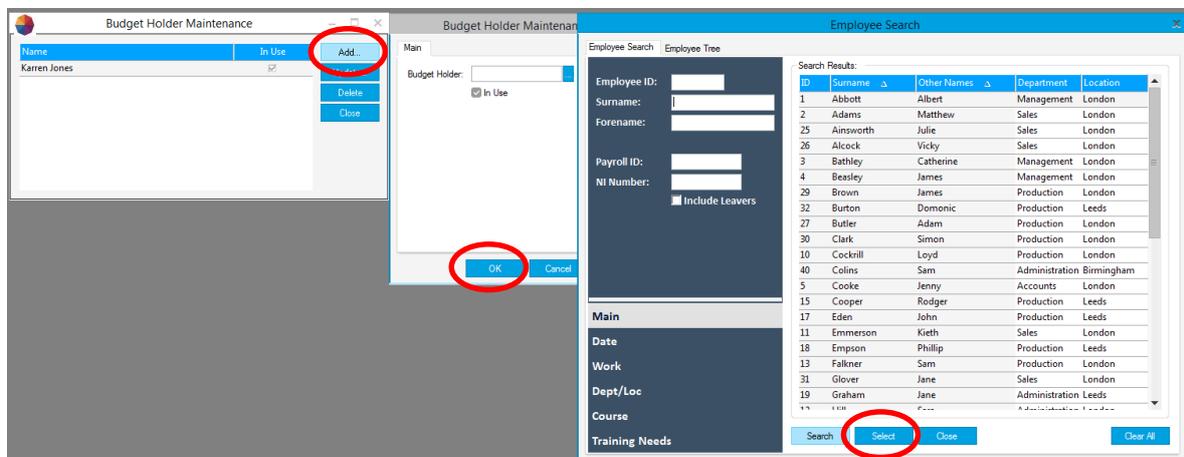
- Select budgeting
- The system will now present the budgeting table

## Budget Holder Maintenance

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



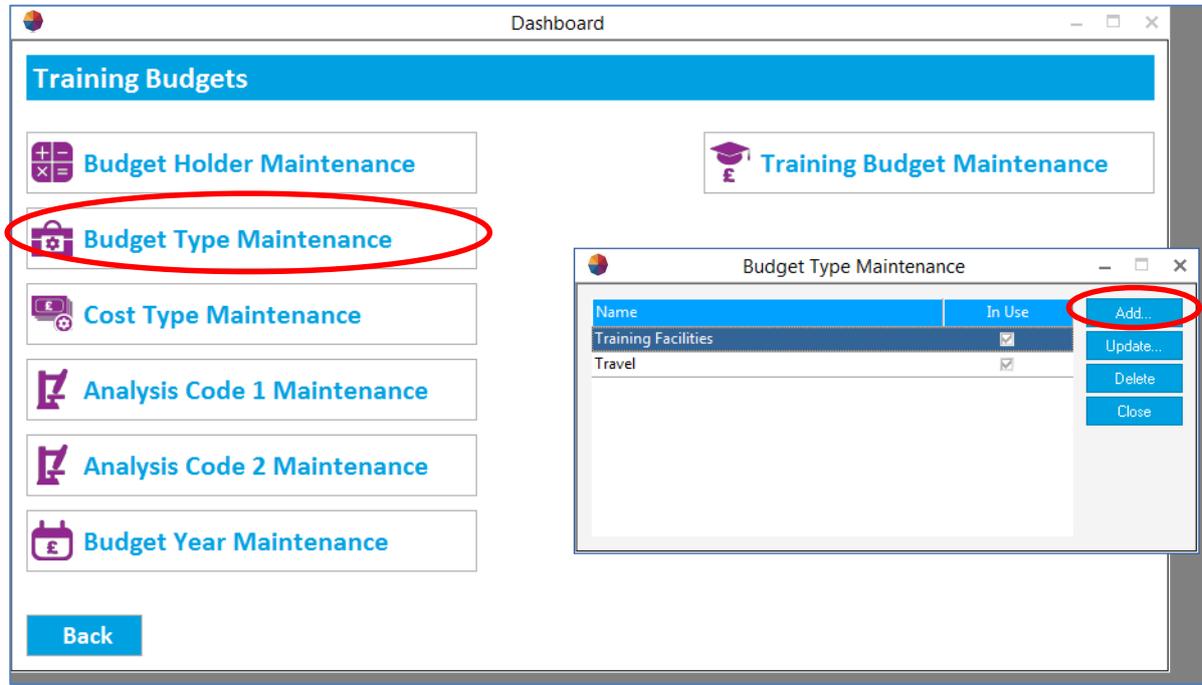
- Select 'Budget Holder Maintenance'
- Select 'Add'
- Click the button to the right of the 'Budget Holder' field and select the relevant employee.
- Click select



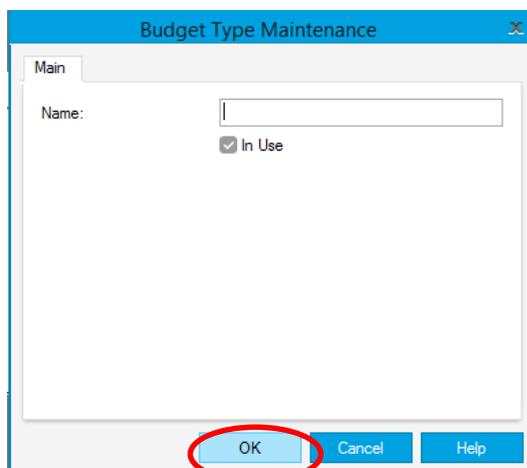
This process may be repeated to capture all budget holders.

## 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.

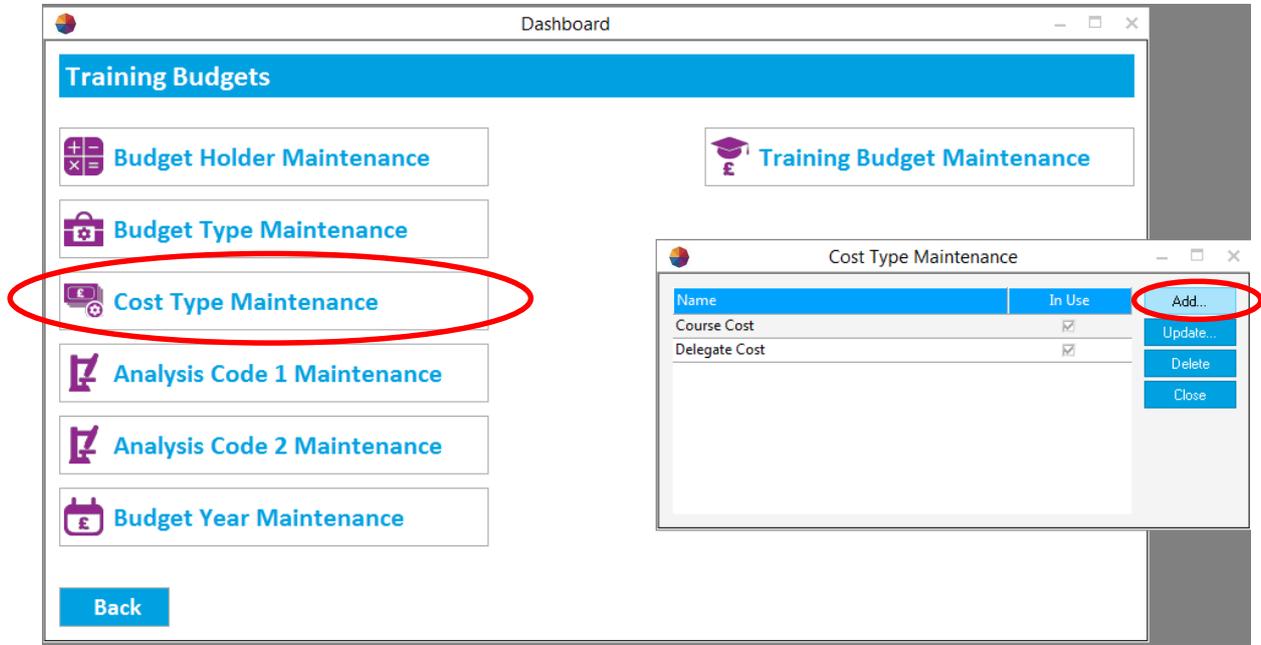


- Select 'Budget Type Maintenance'
- Select 'Add'
- Enter the name of the budget and click ok.

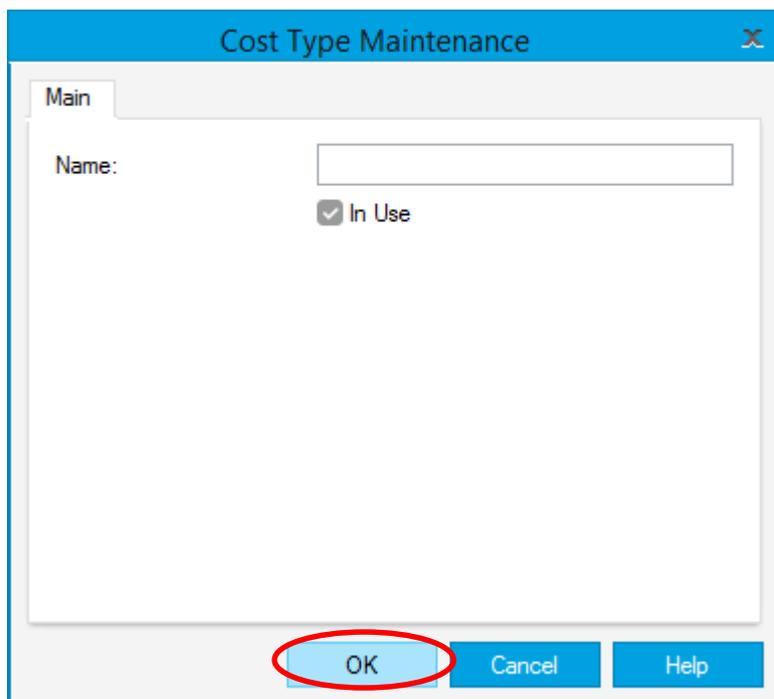


## Cost Type Maintenance

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

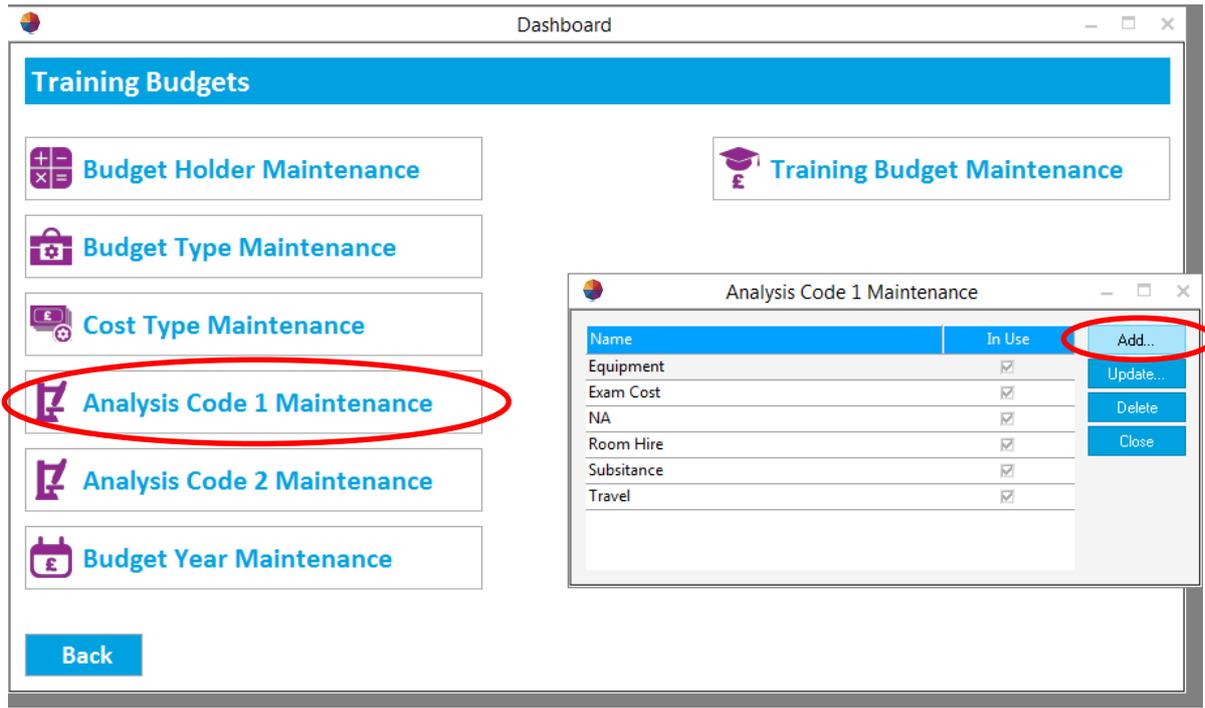


- Select Cost Type Maintenance.
- 'Add'
- Enter the name of the cost type ok.



## 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.



The screenshot shows the 'Training Budgets' dashboard. On the left, there is a vertical list of maintenance options: Budget Holder Maintenance, Budget Type Maintenance, Cost Type Maintenance, Analysis Code 1 Maintenance (circled in red), Analysis Code 2 Maintenance, and Budget Year Maintenance. A 'Back' button is at the bottom left. On the right, there is a 'Training Budget Maintenance' section. An 'Analysis Code 1 Maintenance' dialog box is open, displaying a table with the following data:

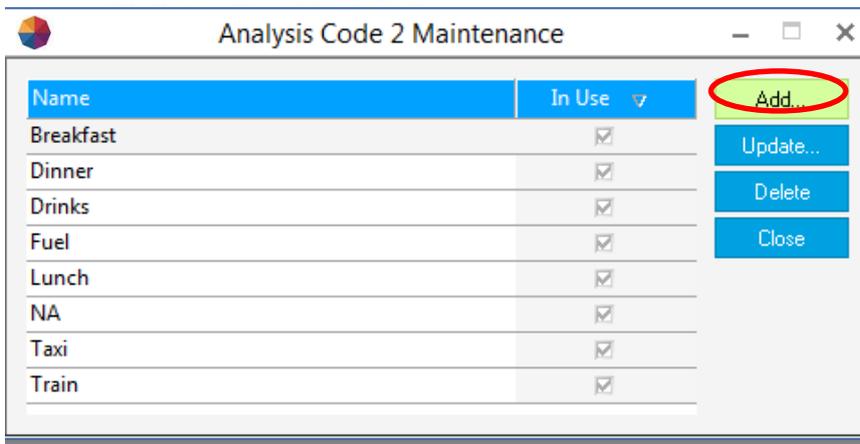
Name	In Use	Actions
Equipment	<input checked="" type="checkbox"/>	<a href="#">Add...</a> <a href="#">Update...</a>
Exam Cost	<input checked="" type="checkbox"/>	<a href="#">Delete</a>
NA	<input checked="" type="checkbox"/>	<a href="#">Close</a>
Room Hire	<input checked="" type="checkbox"/>	
Subsitance	<input checked="" type="checkbox"/>	
Travel	<input checked="" type="checkbox"/>	

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

E.g cost type = Delegate cost

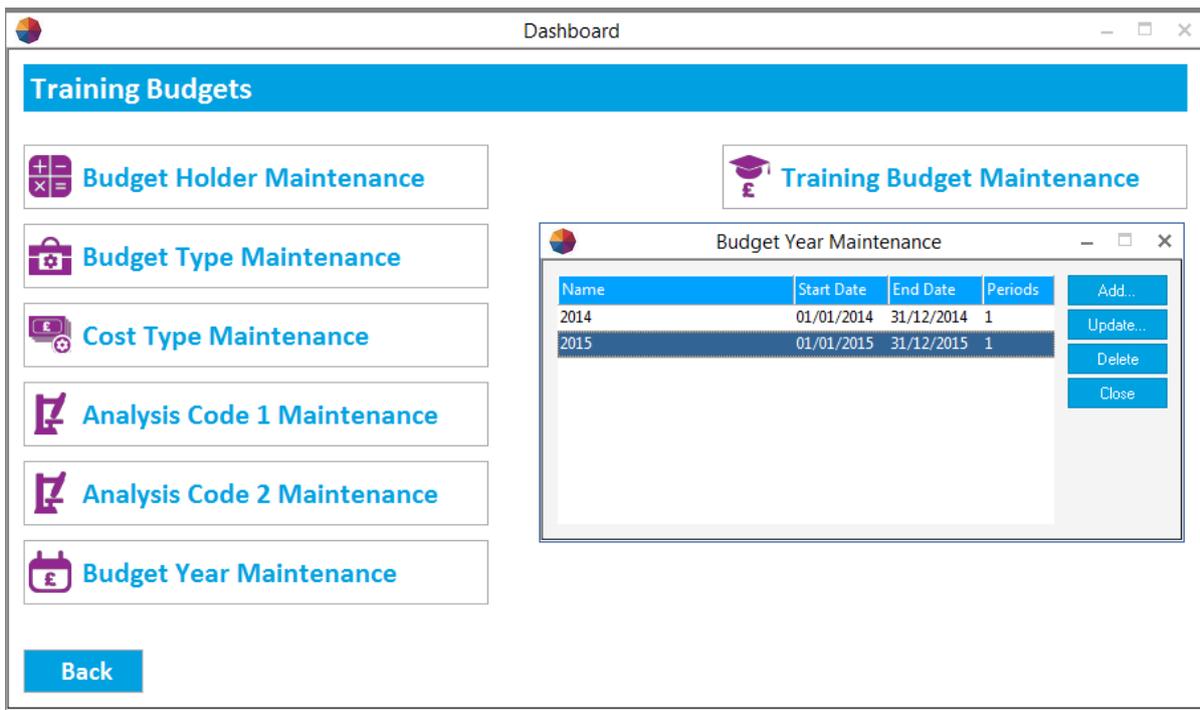
Analysis code 1 = Travel

Do the same for Analysis code 2



## **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.



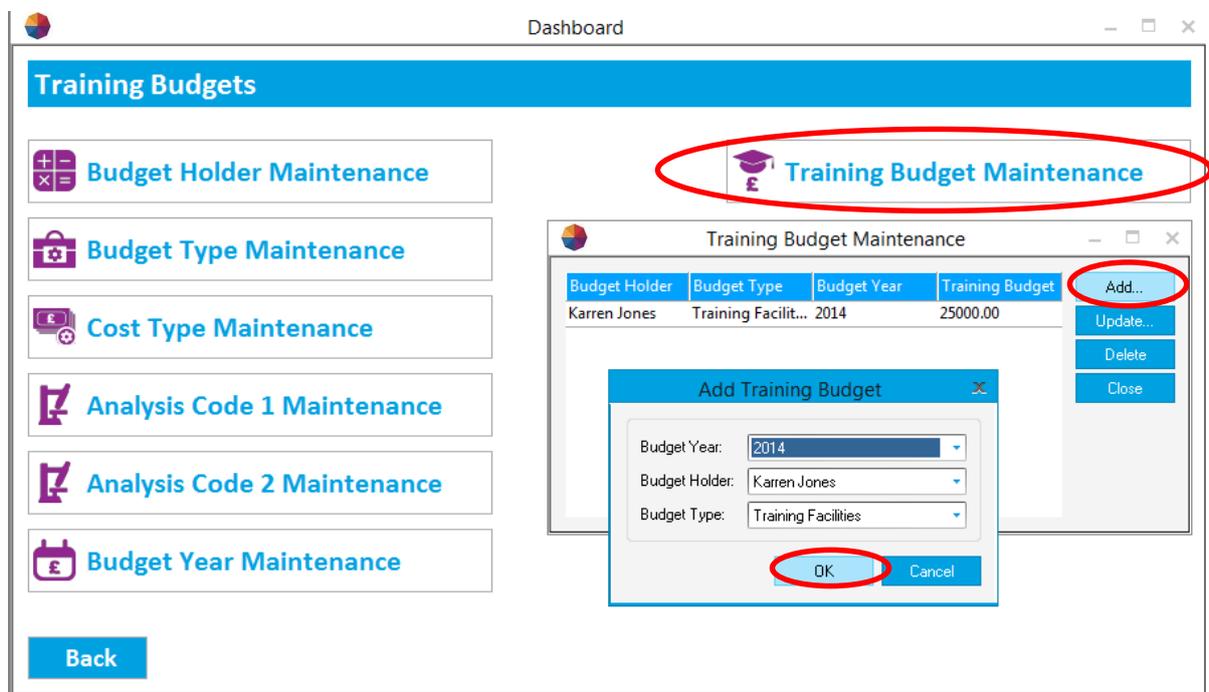
- Select Budget Year Maintenance.
- Select 'Add' and name the budget year i.e 2015.
- Enter the 'Start Date'
- Define how many periods of budget (12 may mean a sum each month)

In the 'Periods' field the user is 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.

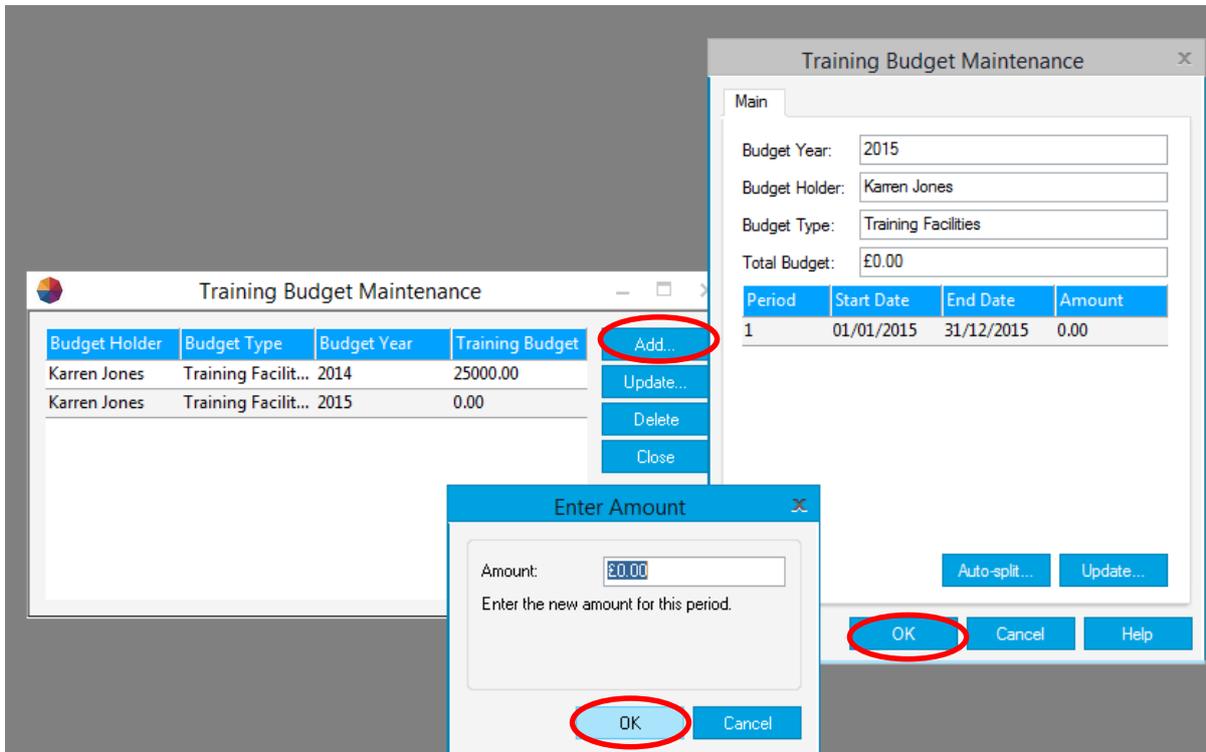


The screenshot shows the 'Training Budget Maintenance' interface. On the left, there is a sidebar with several maintenance options: Budget Holder Maintenance, Budget Type Maintenance, Cost Type Maintenance, Analysis Code 1 Maintenance, Analysis Code 2 Maintenance, and Budget Year Maintenance. The main area displays the 'Training Budget Maintenance' window, which contains a table with the following data:

Budget Holder	Budget Type	Budget Year	Training Budget
Karren Jones	Training Facilit...	2014	25000.00

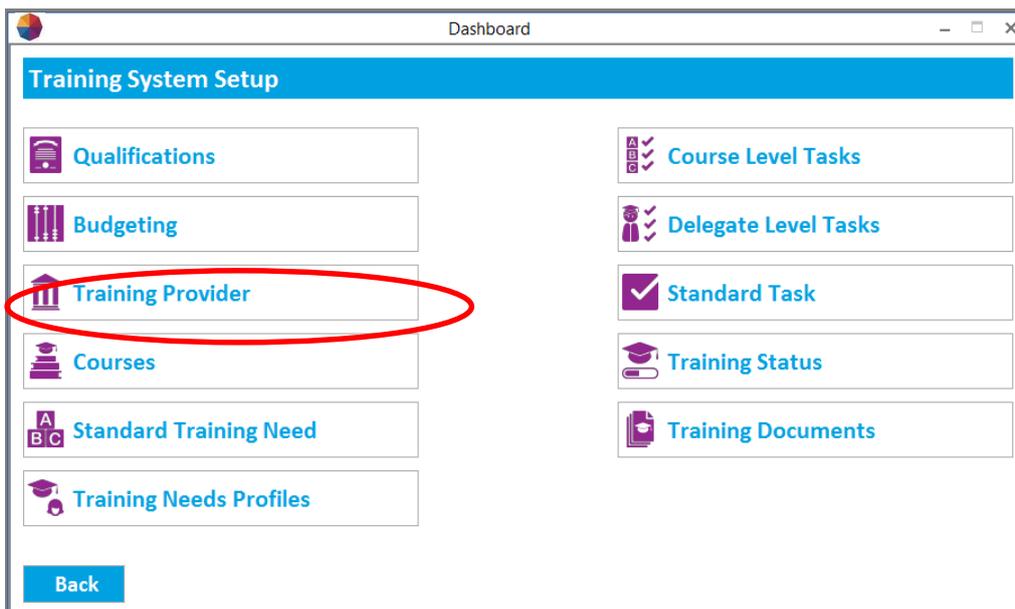
Next to the table, there are buttons for 'Add...', 'Update...', 'Delete', and 'Close'. The 'Add...' button is circled in red. Below the table, an 'Add Training Budget' dialog box is open, showing dropdown menus for 'Budget Year' (2014), 'Budget Holder' (Karren Jones), and 'Budget Type' (Training Facilities). The 'OK' button in the dialog is also circled in red.

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



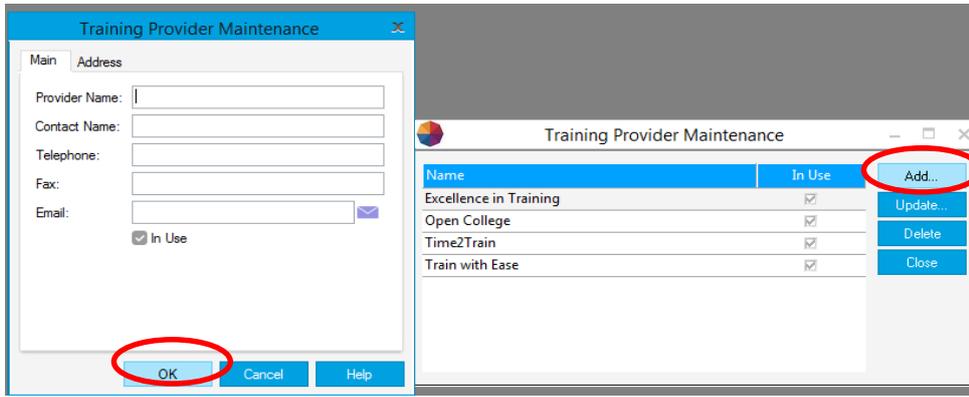
## Training Providers

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



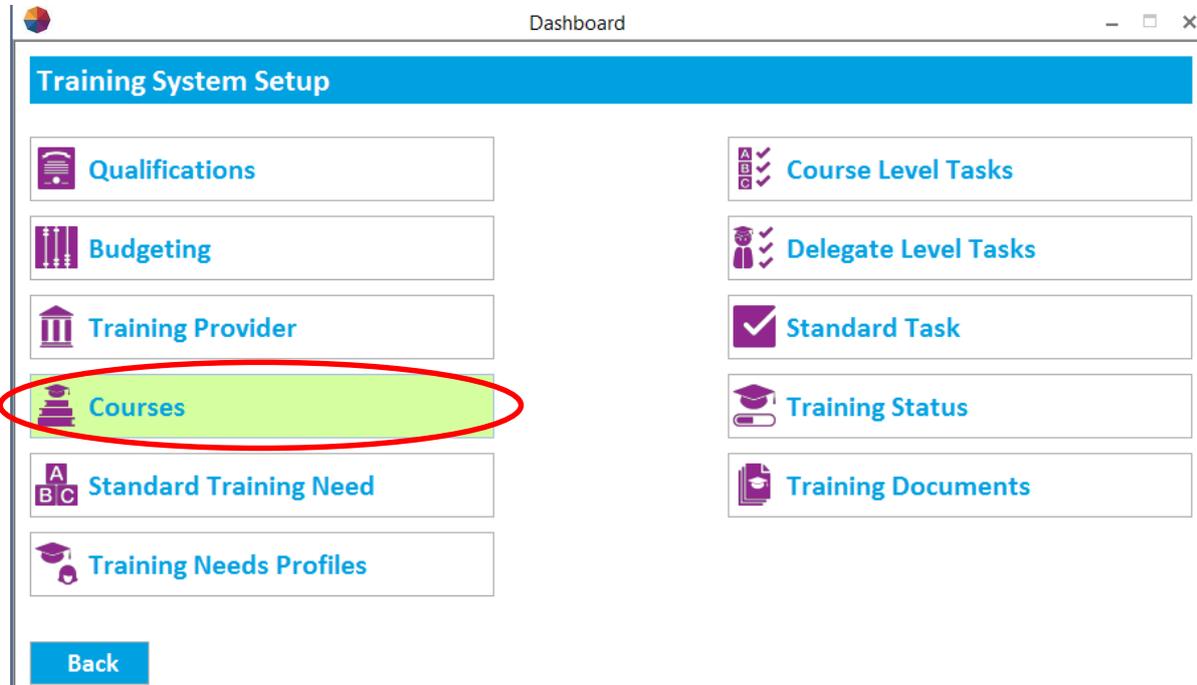
- Select Training Providers

- Click add
- Enter the details
- Select ok

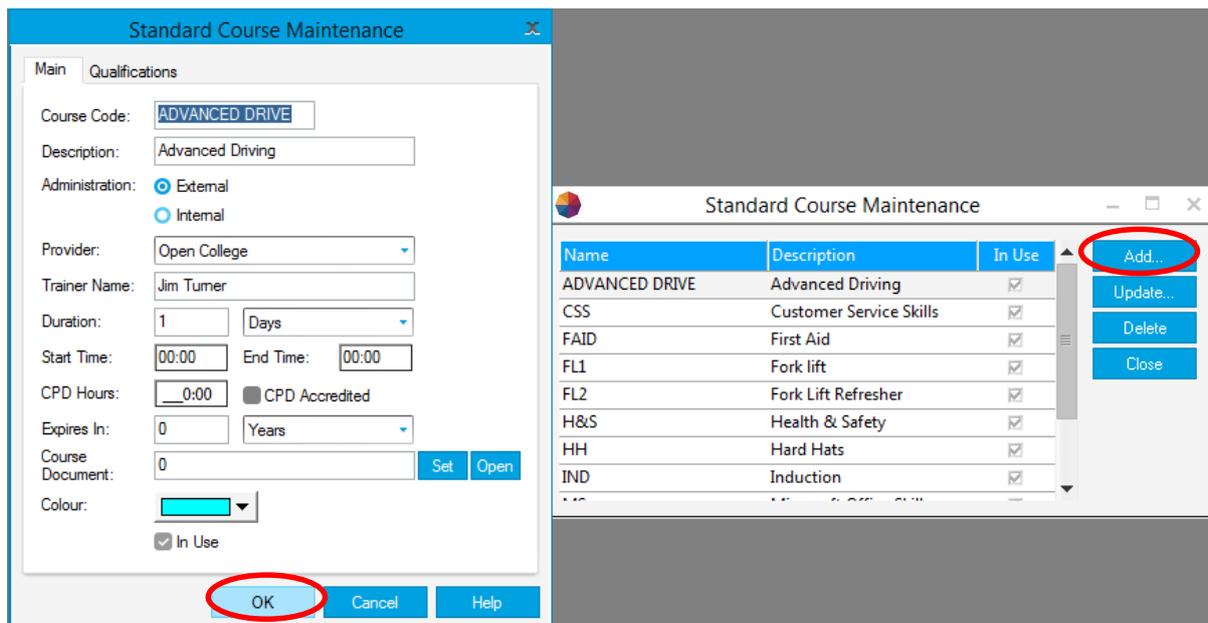


## Standard Course Maintenance

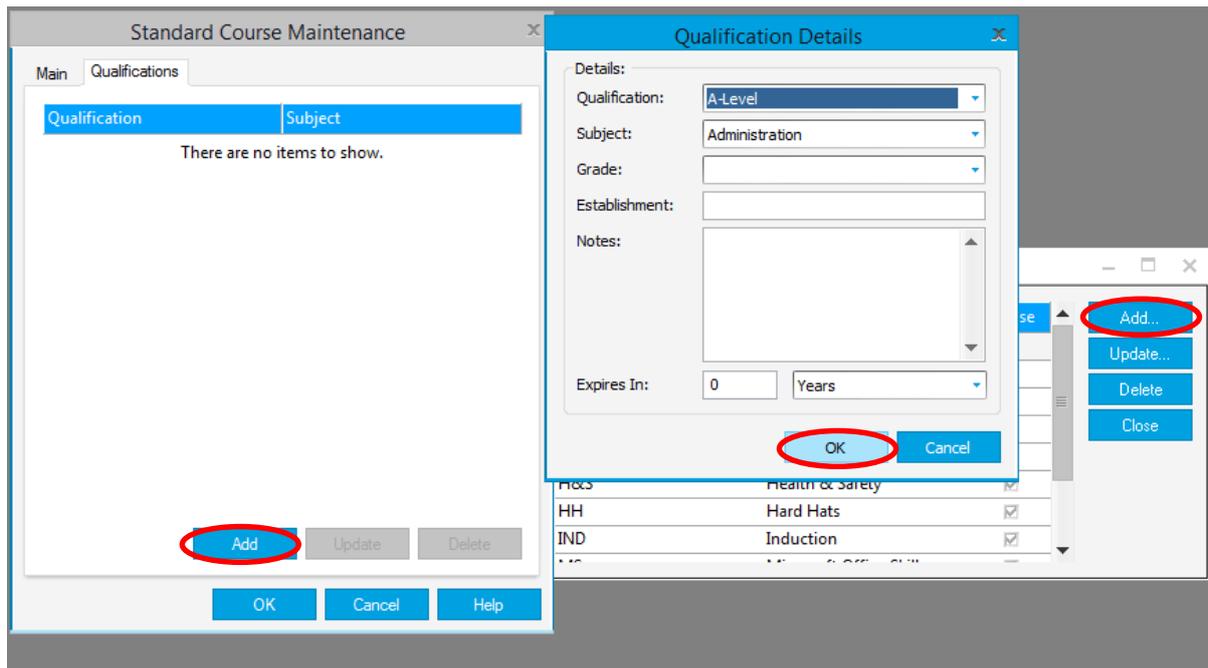
This section allows the user to define details of standard courses available to employees and standardize the information to allow the user to reschedule the course.



- 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.



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.



## **Standard Training Need**

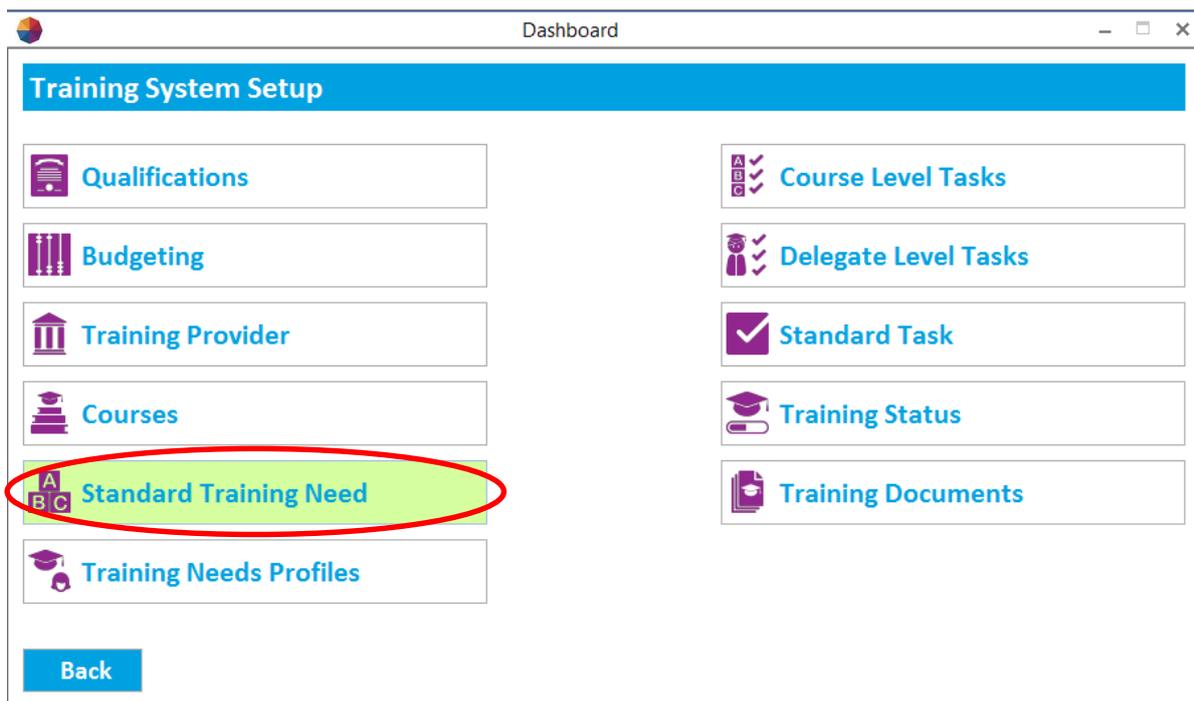
Here the user can define an employee's standard training needs and combine them into a profile that can then be linked to their specific job role. Any employee currently assigned to the post with a linked Training Needs Profile will automatically have their Personnel Manager record updated with the appropriate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

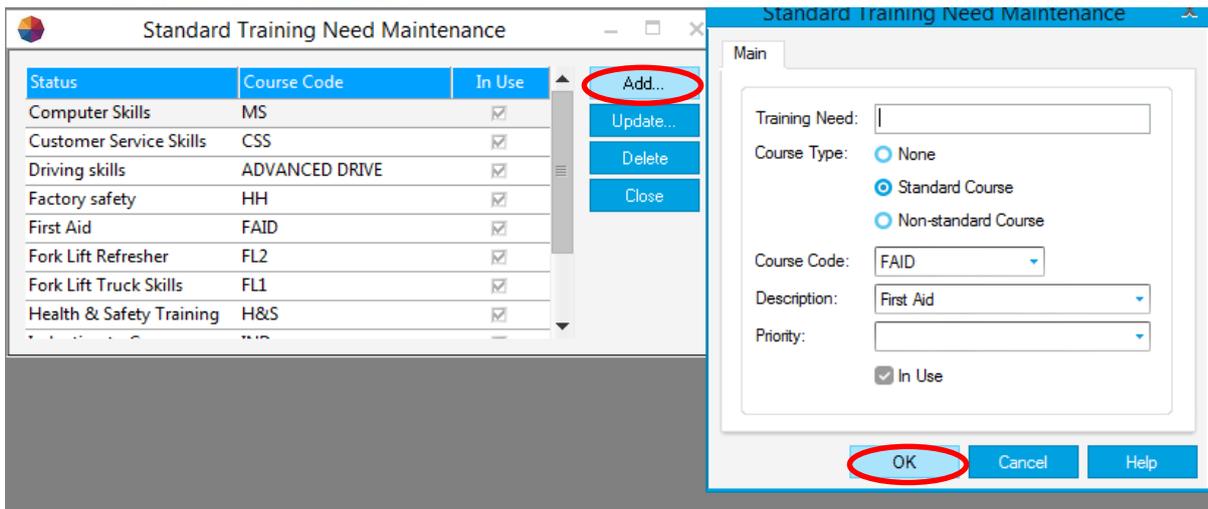
- Select 'Standard Training Need'
- Select 'Add' then provide details of the training need.

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.

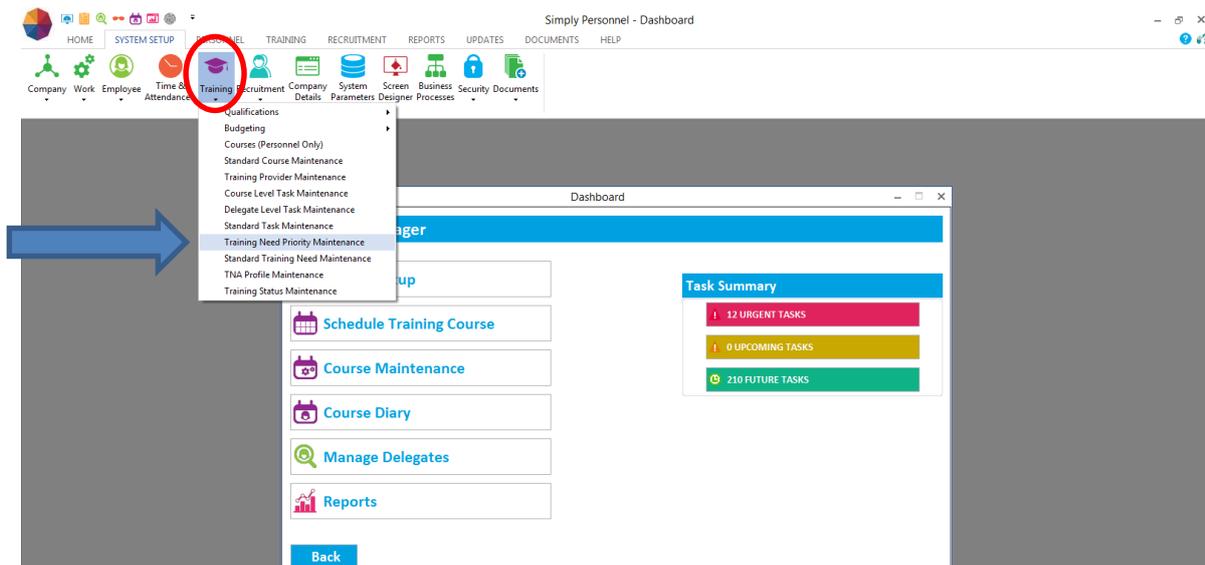
The course type 'None' should be used if the training need is going to be met by any other method apart from attending a course i.e shadowing or mentoring.

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





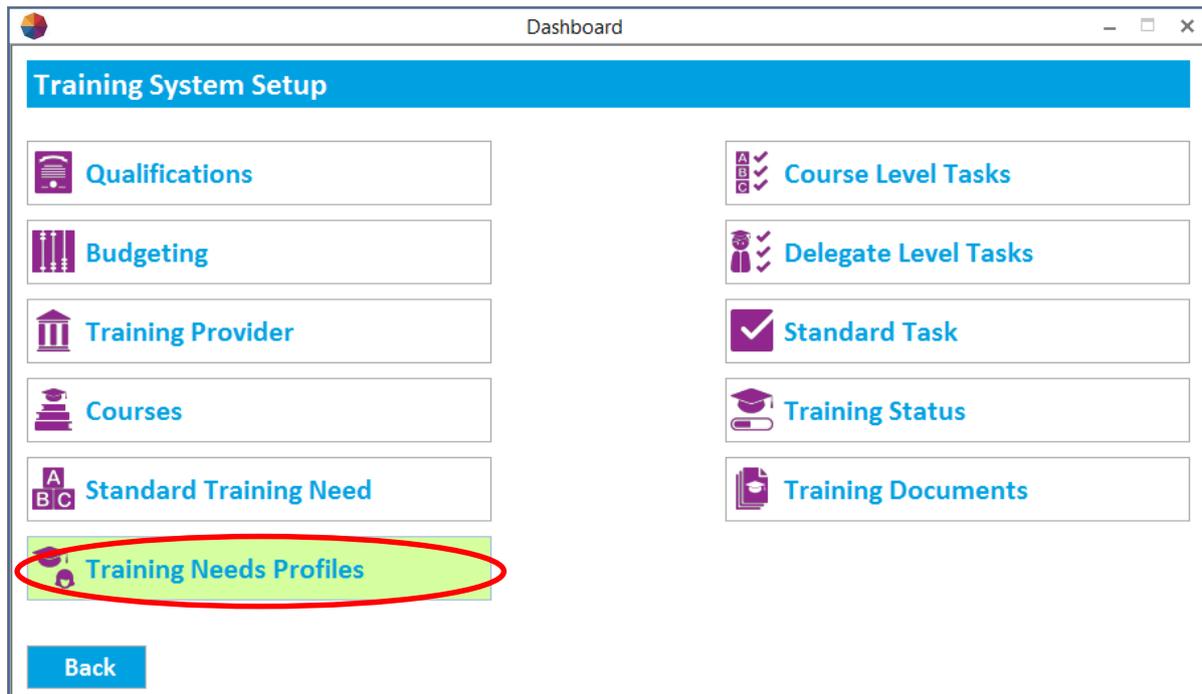
The priorities for Standard Training Needs are setup by clicking on the 'System Setup' tab at the top of the screen and then selecting the 'Training' icon, from the menu. Select 'Training Need Priority Maintenance'.

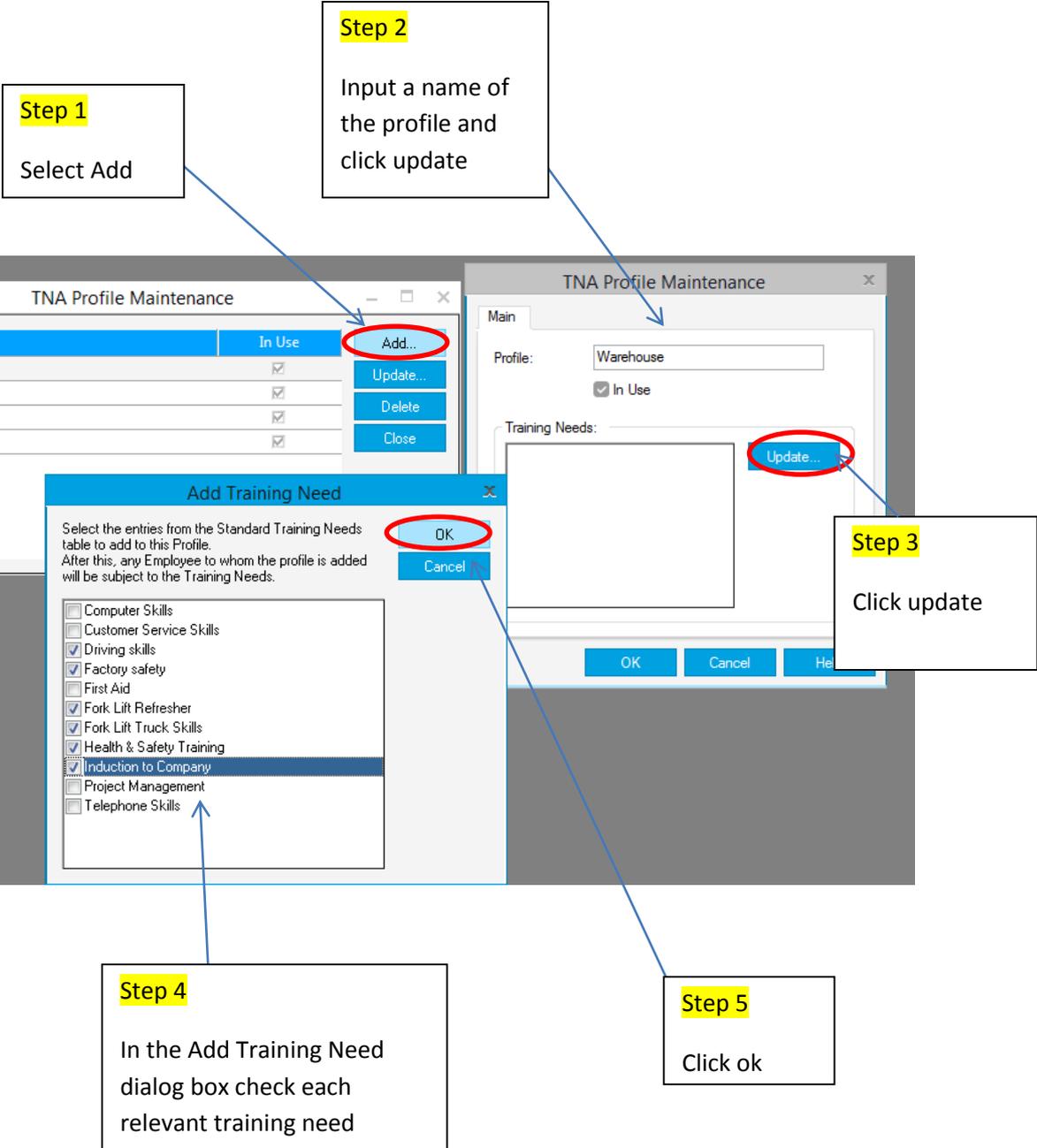


## Training Needs Profiles

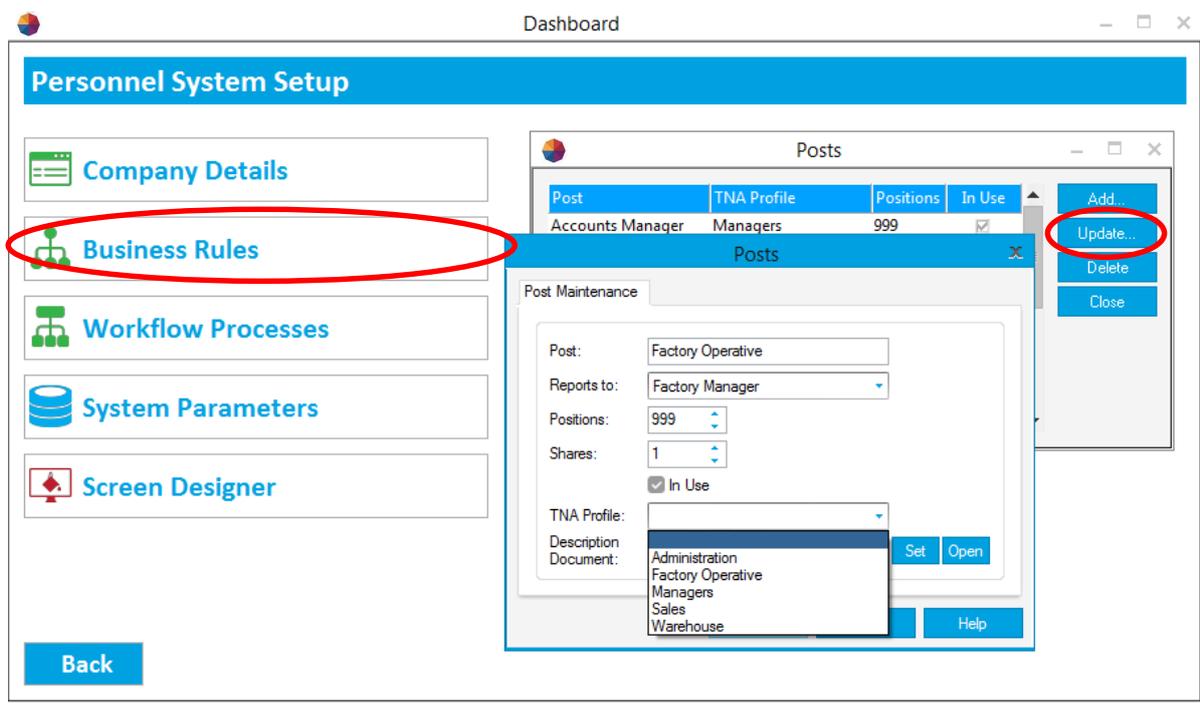
This section is where the user will group together the previously set-up training needs into a training need profile.

- Select 'Training Needs Profiles' to open the section

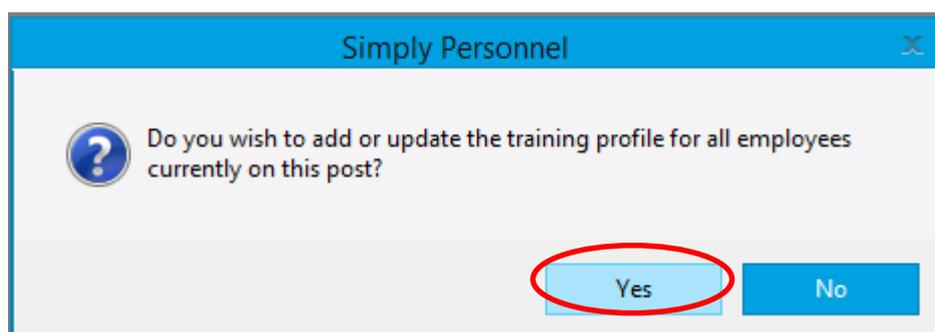


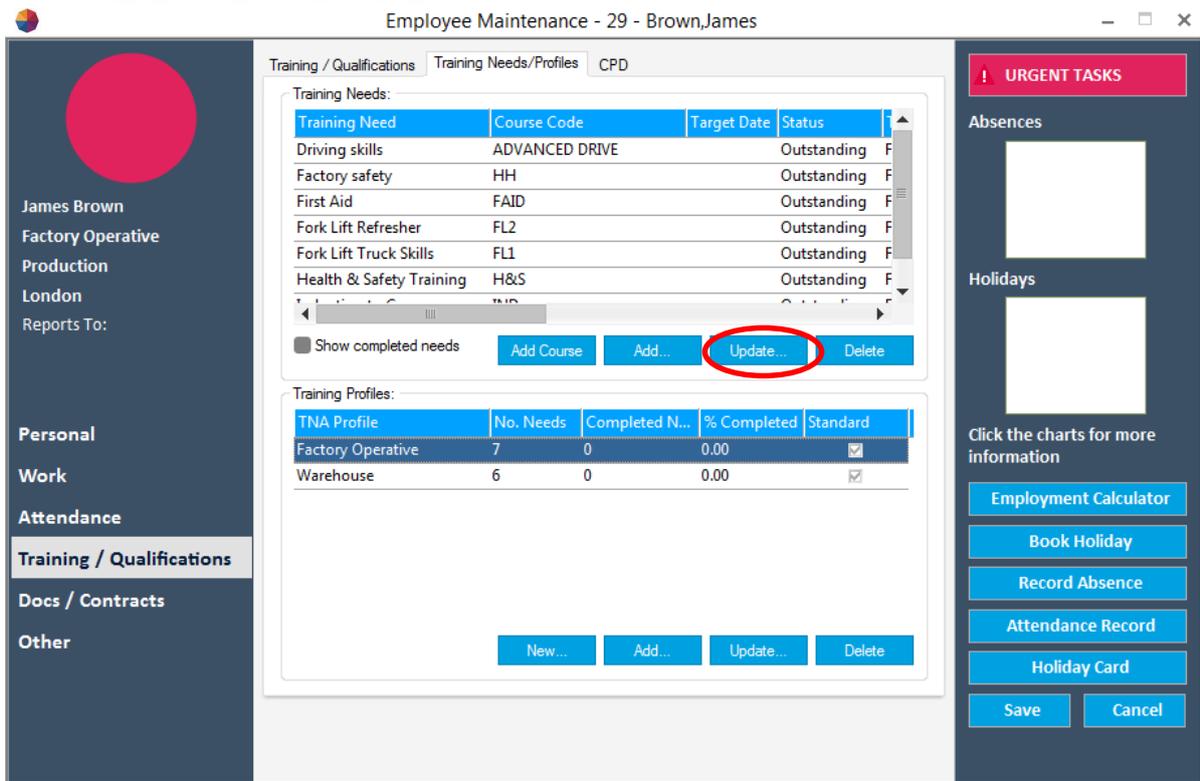


Once the Training Needs Profile has been created and assigned relevant training needs the next thing is to link them to a job post. To do this go back in the Personnel system setup>Business Rules>Posts



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.

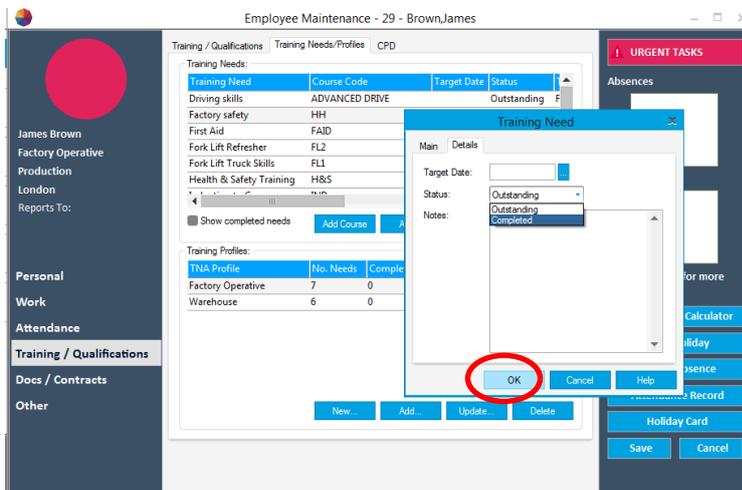




To mark the need as completed:

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

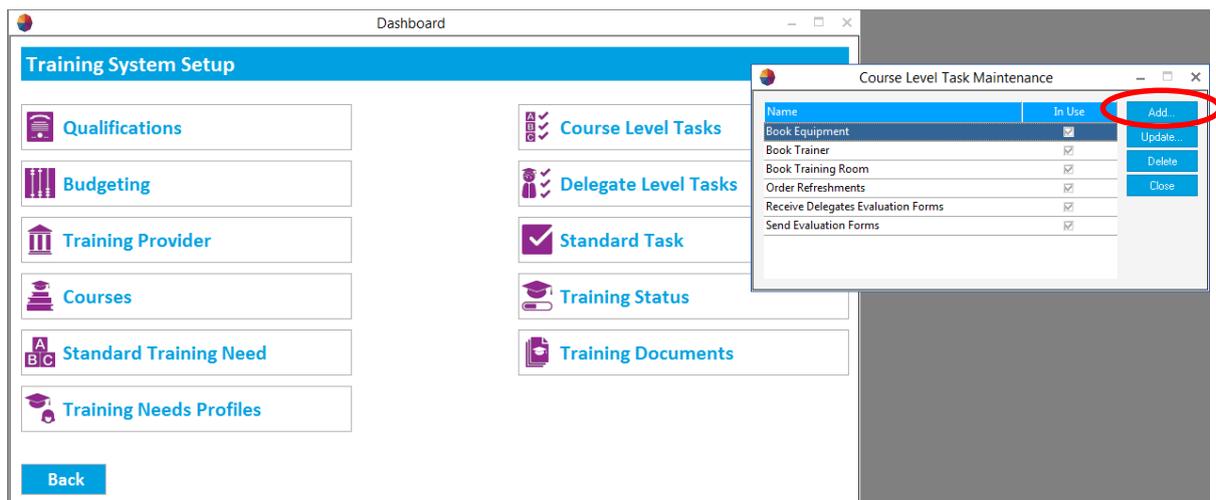
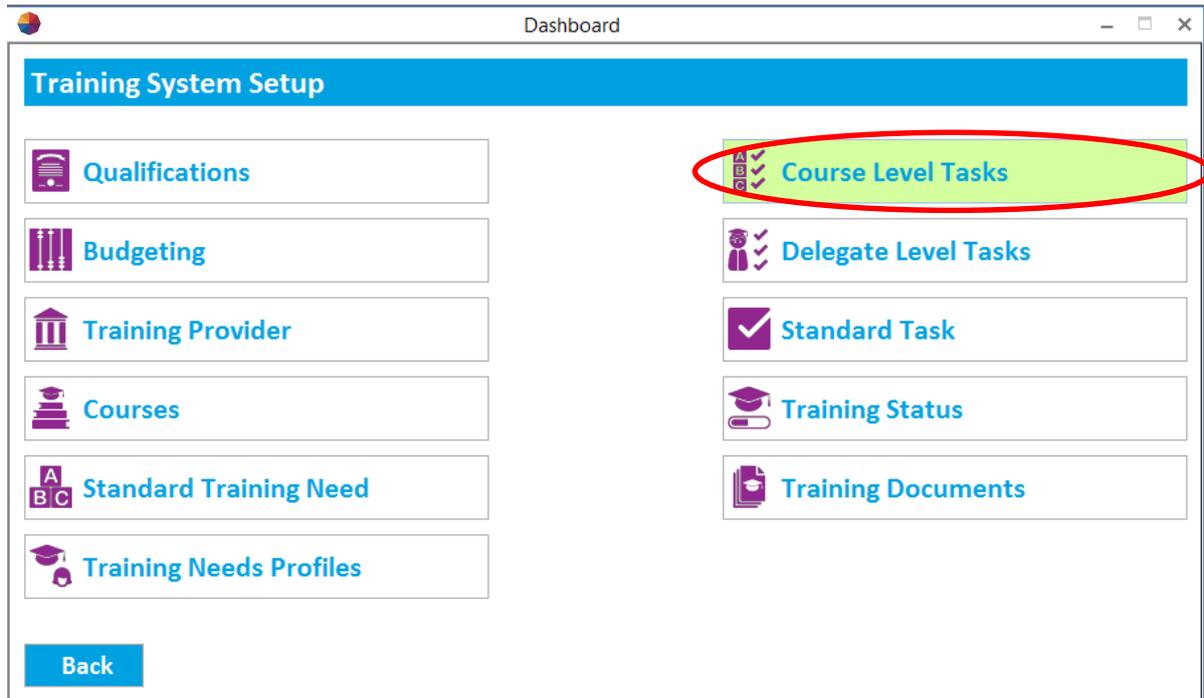
This will then detail a percentage of the Training Needs Profile completed. If the need is linked to a course and the employee completes the course this will automatically complete the need. Alternatively as below the user can manually completed the need .



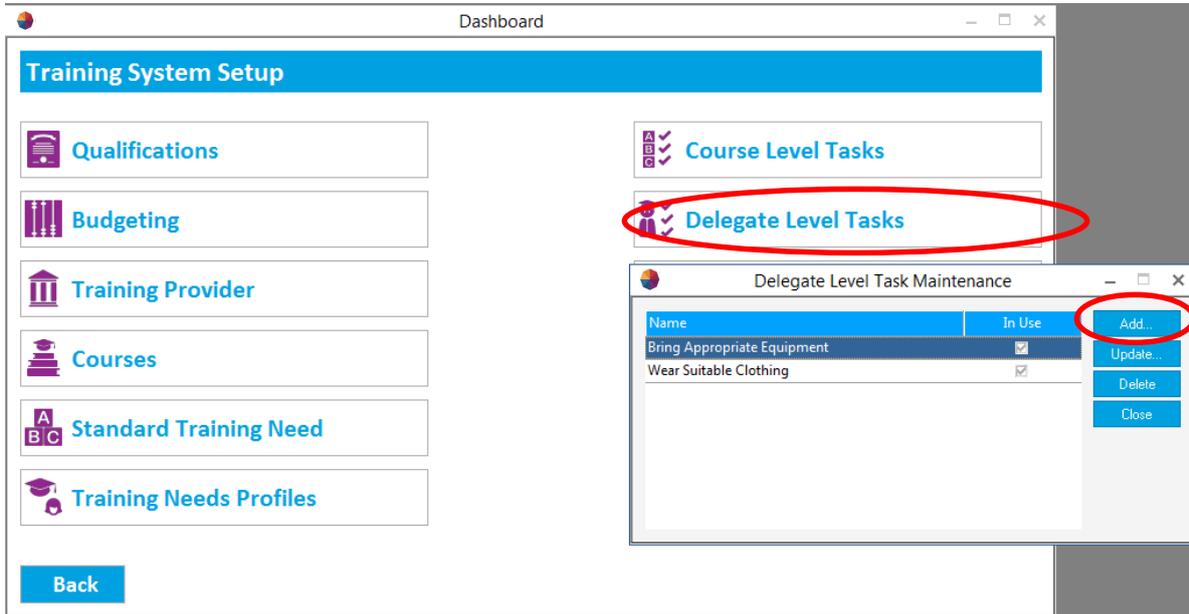
## Course Level Tasks and Delegate Level Tasks

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



Repeat this procedure for adding automatic tasks for delegates.



Dashboard

### Training System Setup

- Qualifications
- Budgeting
- Training Provider
- Courses
- Standard Training Need
- Training Needs Profiles

Back

- Course Level Tasks
- Delegate Level Tasks**

#### Delegate Level Task Maintenance

Name	In Use	Add...
Bring Appropriate Equipment	<input checked="" type="checkbox"/>	Update...
Wear Suitable Clothing	<input checked="" type="checkbox"/>	Delete

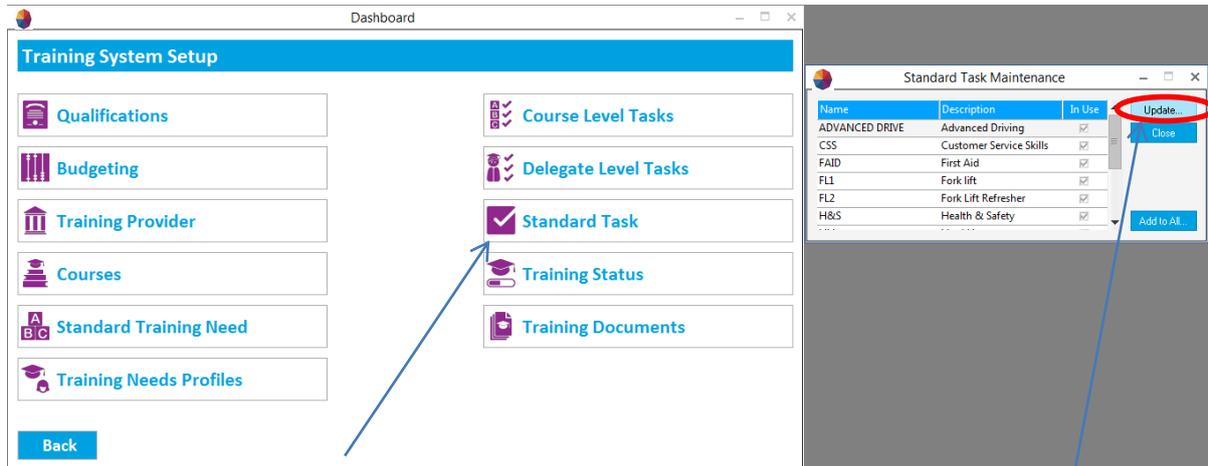
Close

- 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

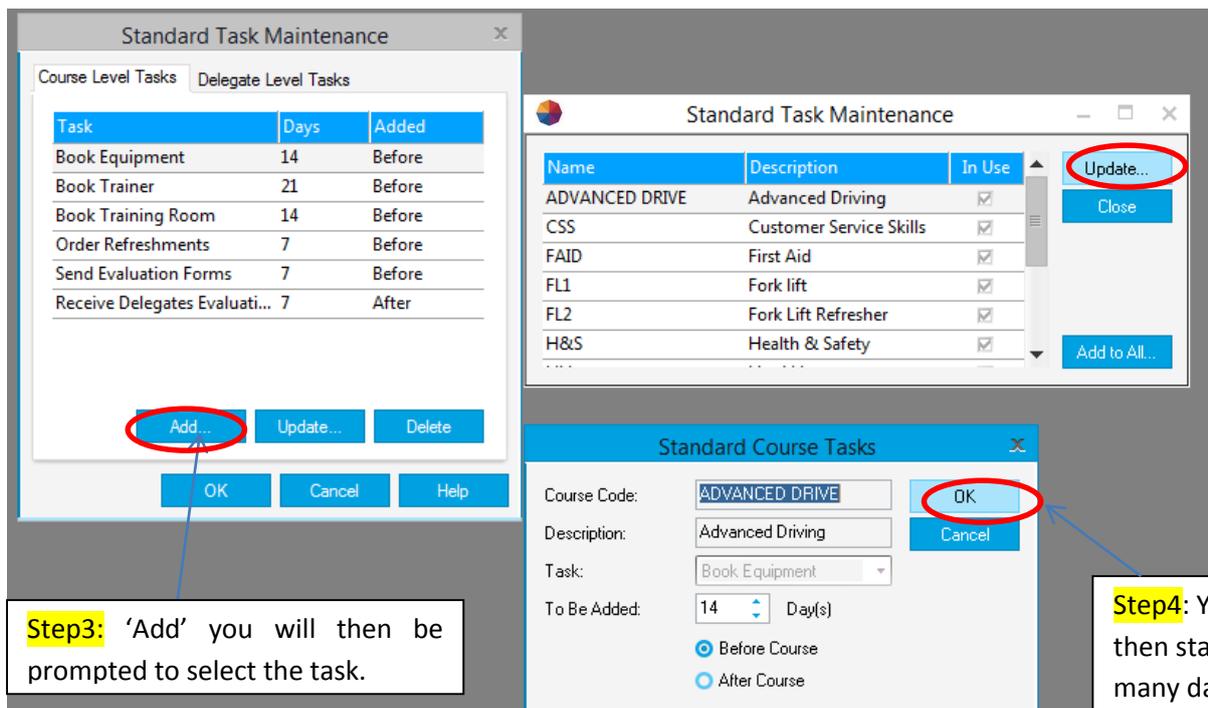
This area will allow as user to group course level tasks and delegate level tasks to a standard course.

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



**Step1:** Select 'Standard Task'.

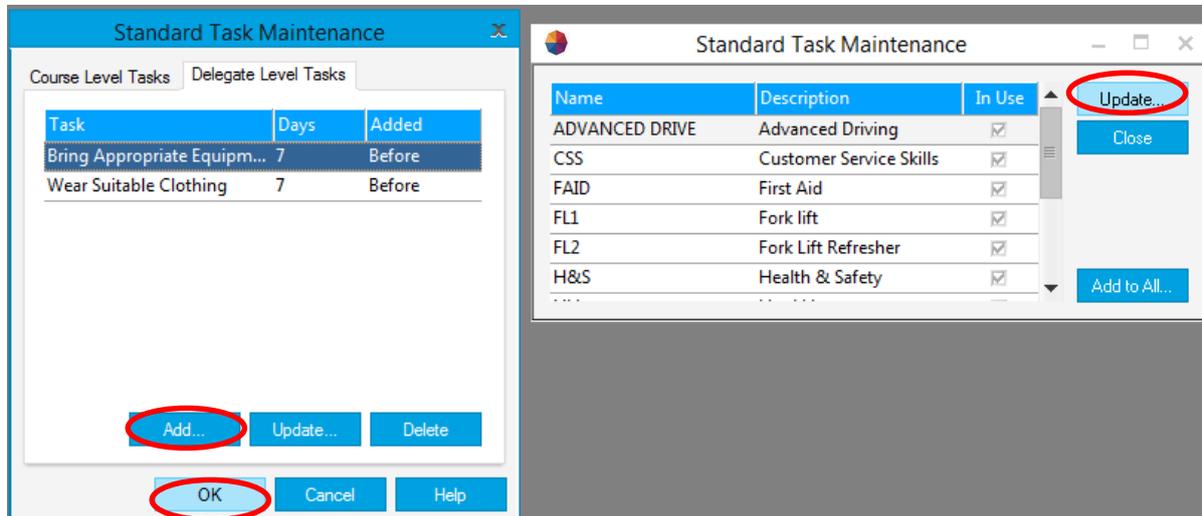
**Step2:** Select the course you wish to combine your previously set-up tasks with and select 'Update'.



**Step3:** 'Add' you will then be prompted to select the task.

**Step4:** You can then state how many days before or after the course you would like the reminder to

Then do the same on the Delegate Level Tasks.



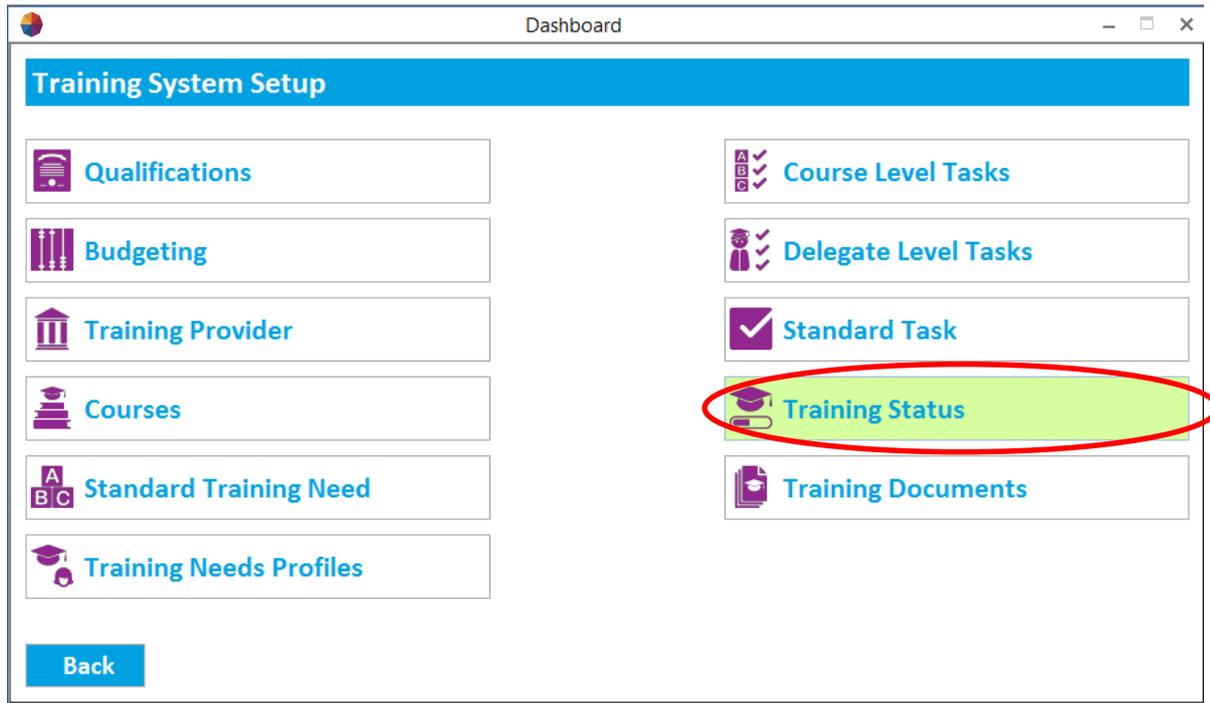
There is also the option to 'Add to All' which will allow you to set standard delegate/course tasks to all standard courses.

## Training Status

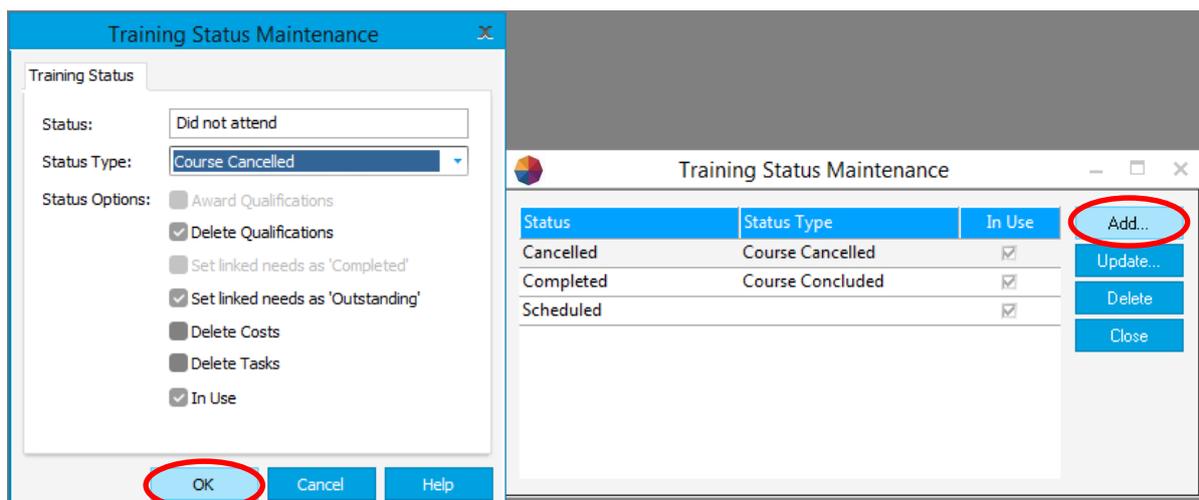
This section allows a user to apply a status to a course or delegate.

- Select 'Training Status'

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



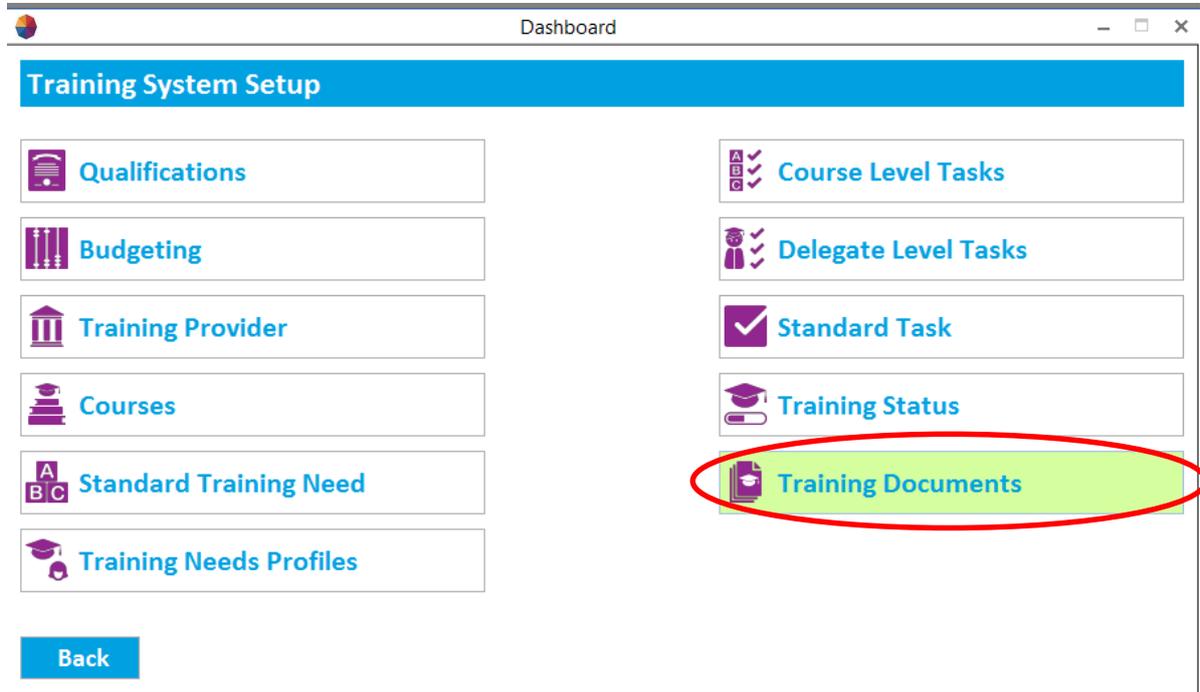
- Select add



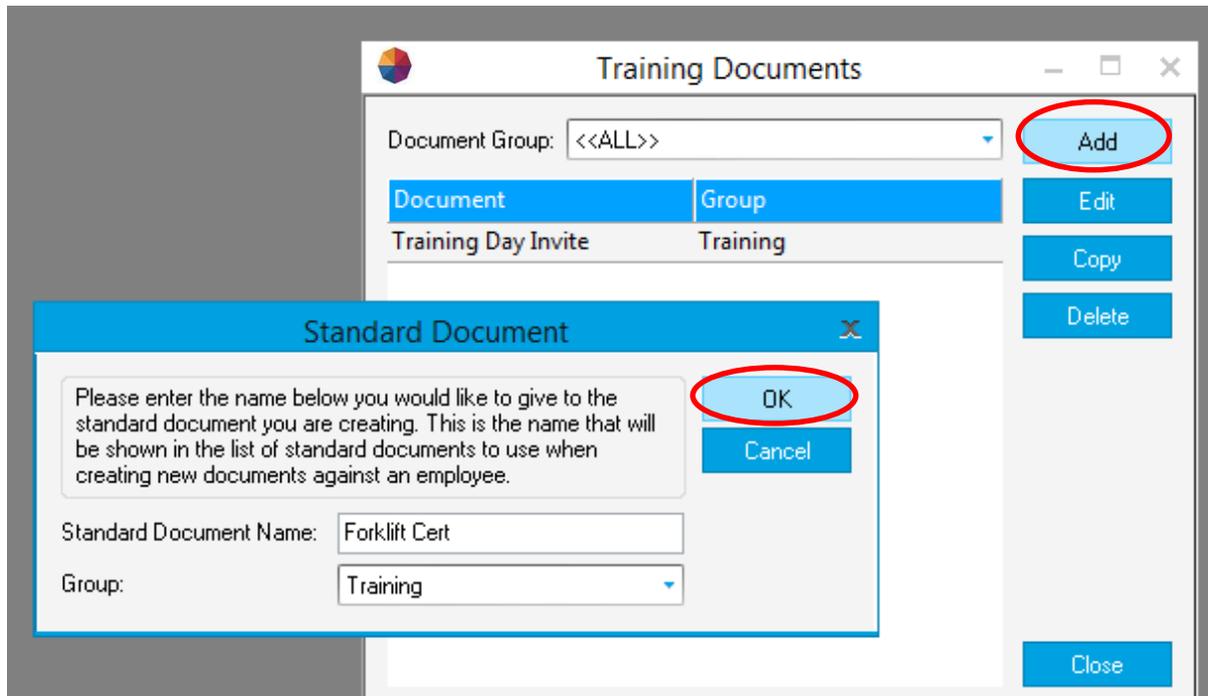
- Select ok

## Training Documents

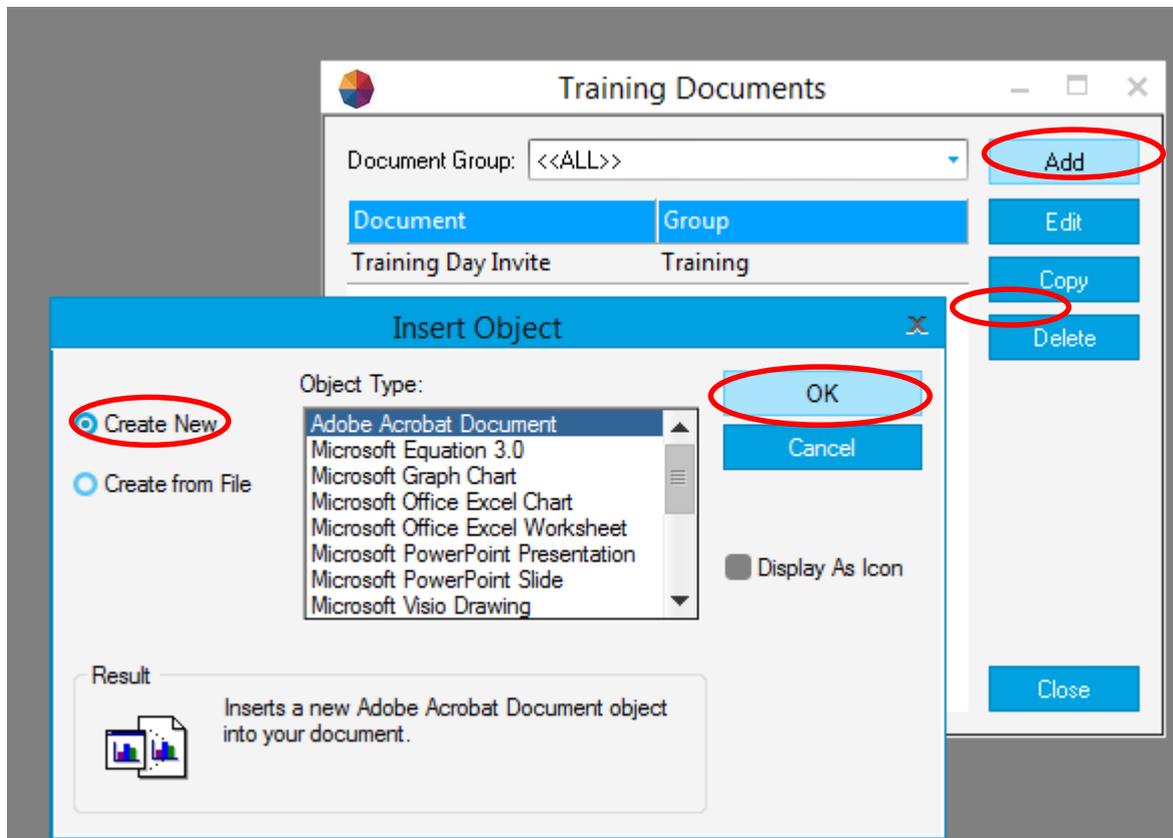
This area will allow a user upload our training documents which you can then use to mail merge against an employee record.



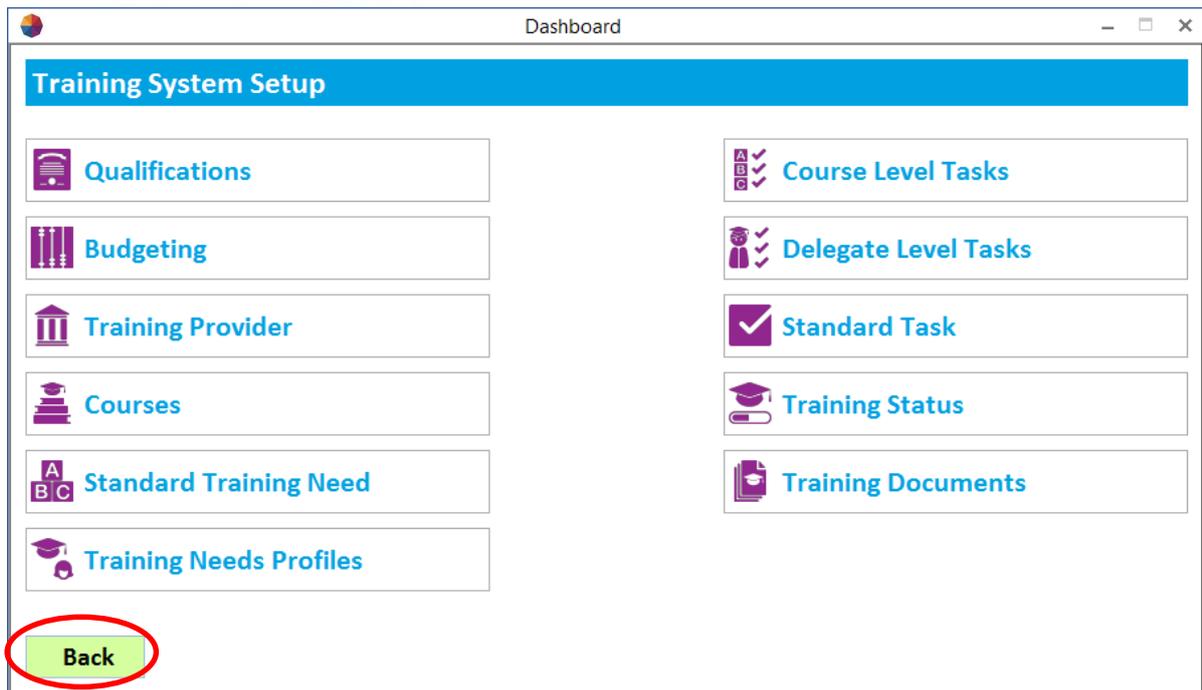
- Select 'Training Documents'
- Select 'Add' and provide the template with a name.



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



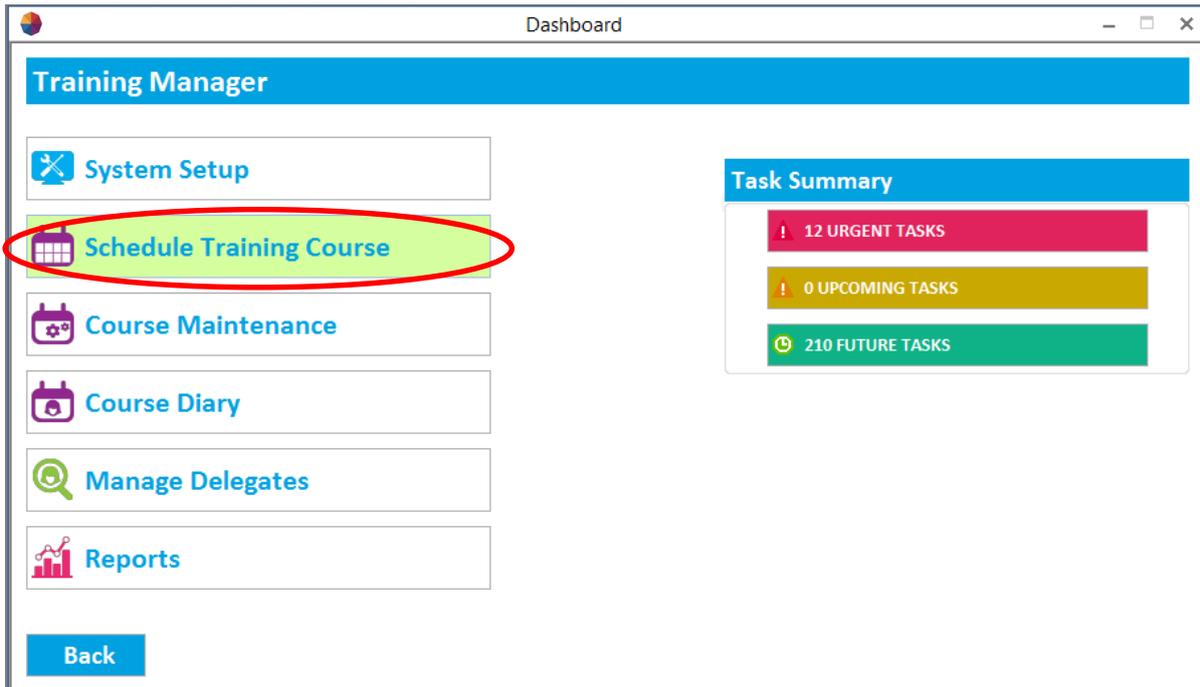
Now we will look at scheduling a course select the back button from the dashboard



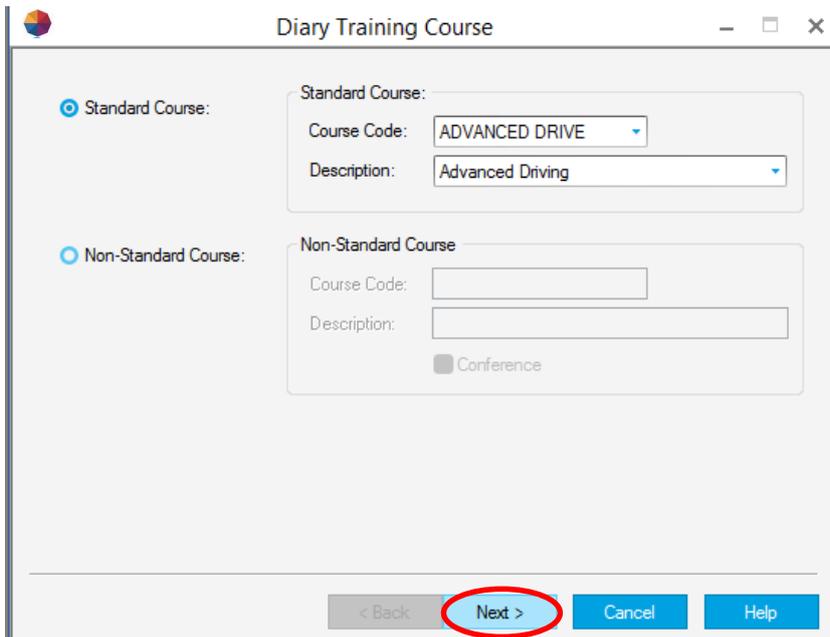
## **Scheduling a Training Course**

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

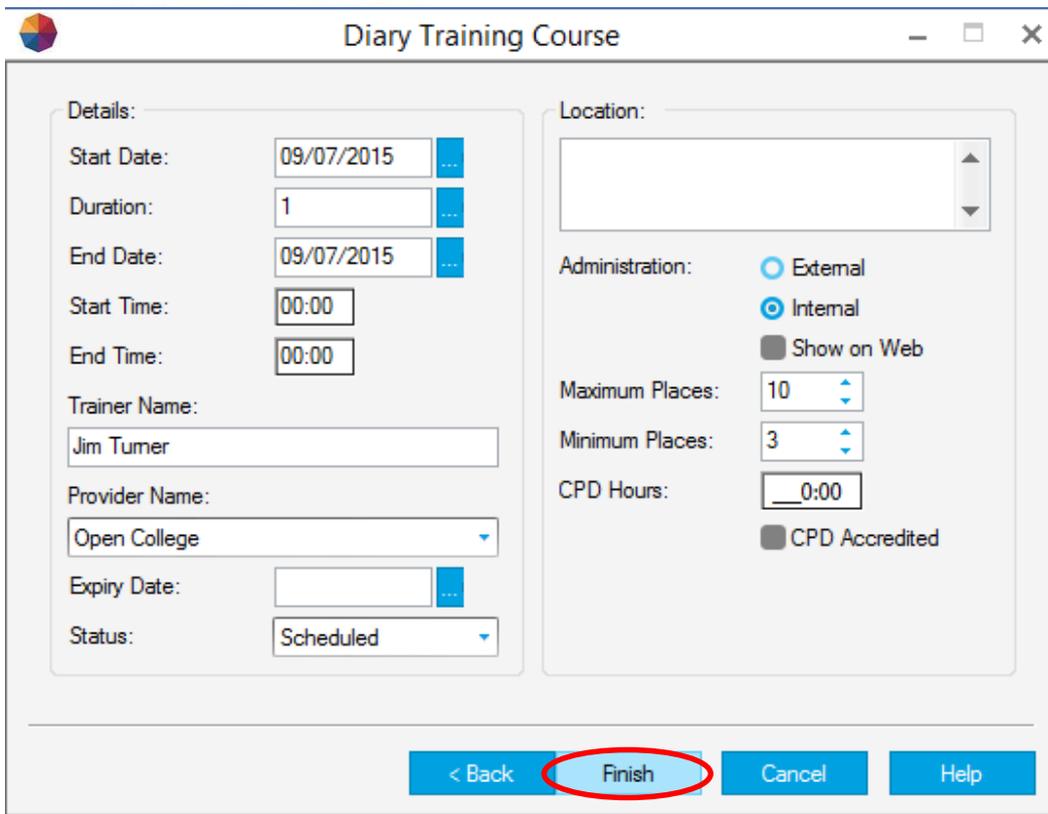
Select Schedule Training Course to view the options to select. A Standard Course will pull through from the system setup; alternatively if it is a Non-standard course select the Non- Standard Course Section.



- Select schedule a training course

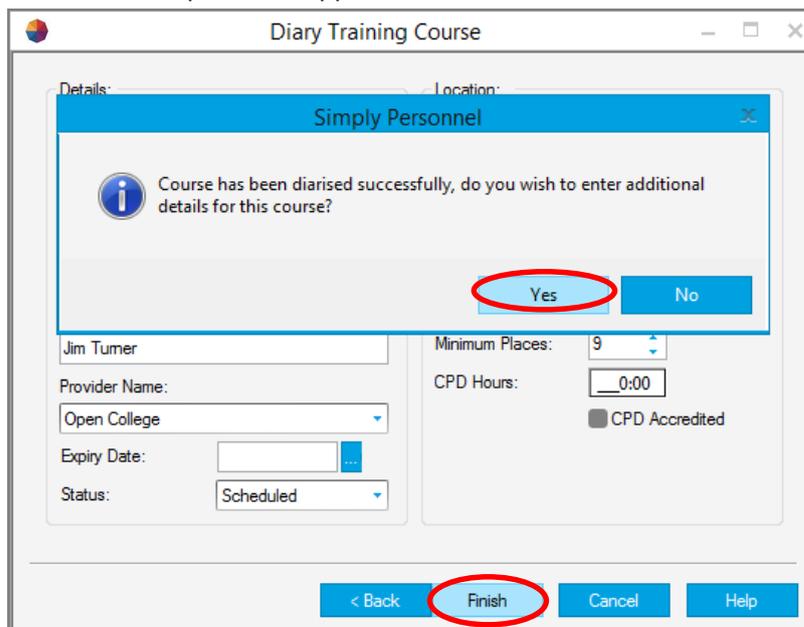


- Select next



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



- Select yes the course maintenance section will now open

## Course Maintenance

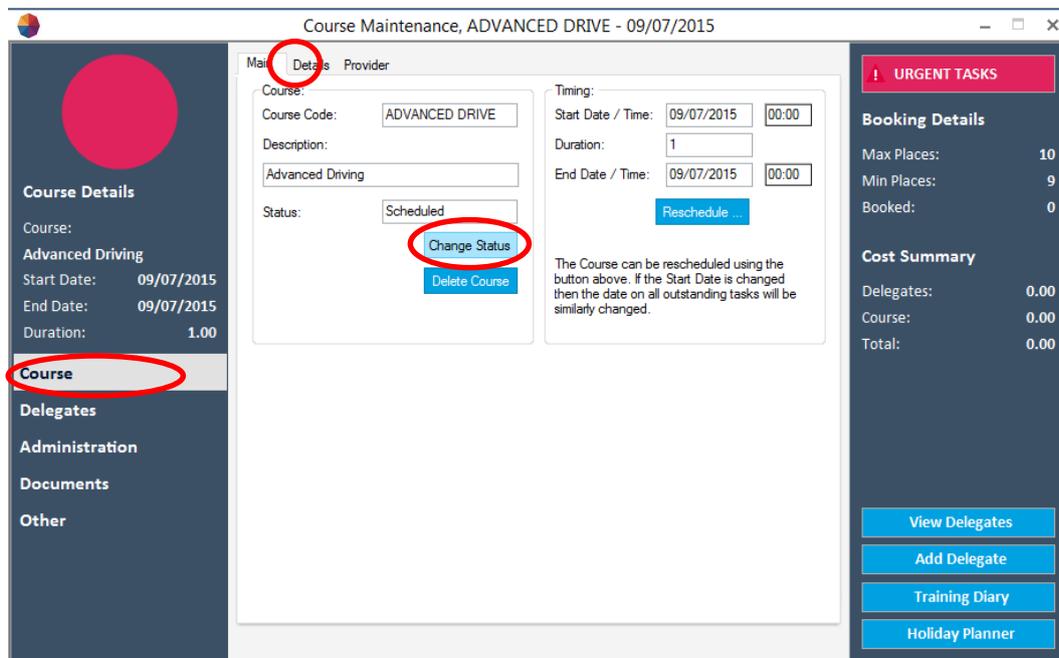
The user can now detail various aspects of the course and maintain the location, dates, time etc. The status of the course can be changed or re-scheduled delegates can be added to the course or perhaps the waiting list costs can also be recorded.

- Utilise the tabs on the side to navigate

### Main

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.



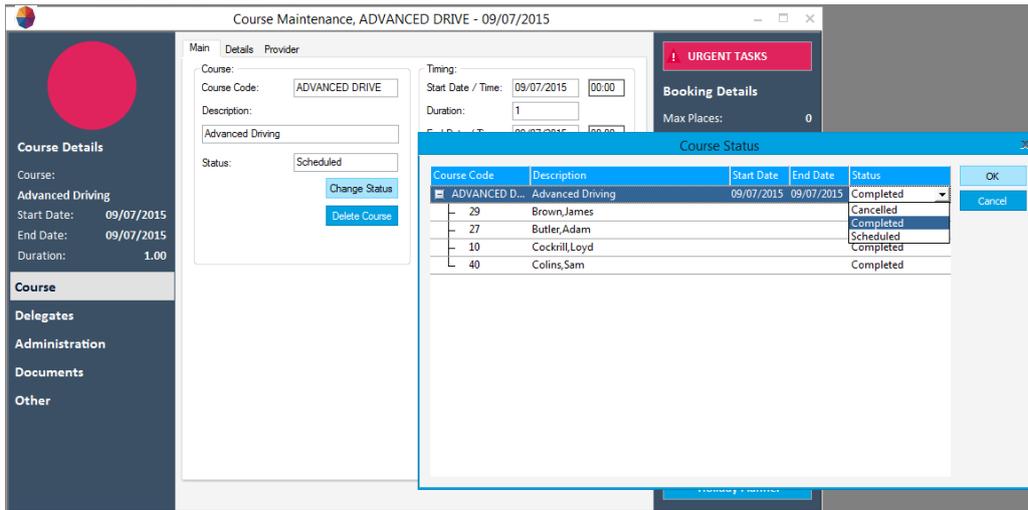
The screenshot shows the 'Course Maintenance' interface for 'ADVANCED DRIVE' on 09/07/2015. The interface is divided into three main sections:

- Left Sidebar:** Contains navigation tabs: Course (highlighted with a red circle), Delegates, Administration, Documents, and Other.
- Main Content Area:**
  - At the top, there are tabs: Main (highlighted with a red circle), Details, and Provider.
  - The 'Course' section includes:
    - Course Code:
    - Description:
    - Status:  (with a red circle around the text and a 'Change Status' button below it)
    - Buttons: 'Delete Course' and 'Reschedule ...'
  - The 'Timing' section includes:
    - Start Date / Time:
    - Duration:
    - End Date / Time:
  - A note below the timing section: "The Course can be rescheduled using the button above. If the Start Date is changed then the date on all outstanding tasks will be similarly changed."
- Right Sidebar:**
  - 'URGENT TASKS' section with a red exclamation mark icon.
  - 'Booking Details' section:
 

Max Places:	10
Min Places:	9
Booked:	0
  - 'Cost Summary' section:
 

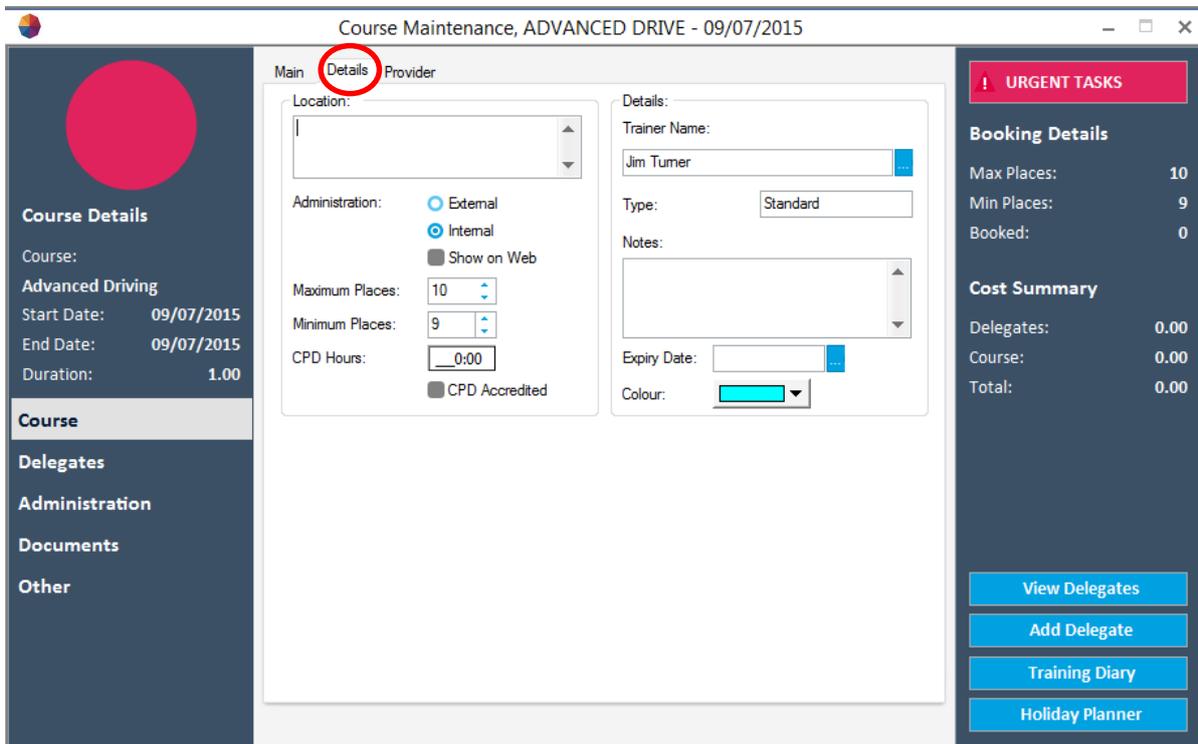
Delegates:	0.00
Course:	0.00
Total:	0.00
  - Buttons at the bottom: 'View Delegates', 'Add Delegate', 'Training Diary', and 'Holiday Planner'.

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



## Details

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

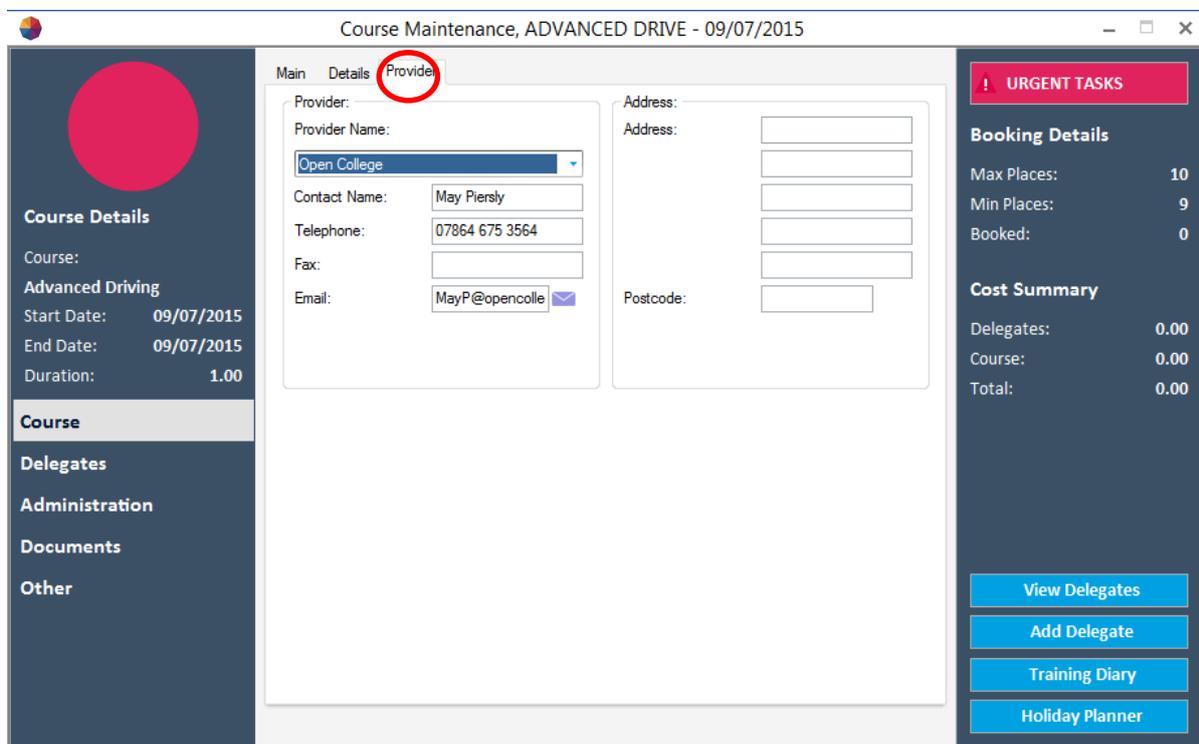




Show on web will display this course on the Self Service system to allow employees to request to go onto the course.

## Provider

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



Course Maintenance, ADVANCED DRIVE - 09/07/2015

Main Details **Provider**

Provider:  
 Provider Name:   
 Contact Name:   
 Telephone:   
 Fax:   
 Email:  

Address:  
 Address:   
  
  
  
 Postcode:

**URGENT TASKS**

**Booking Details**  
 Max Places: 10  
 Min Places: 9  
 Booked: 0

**Cost Summary**  
 Delegates: 0.00  
 Course: 0.00  
 Total: 0.00

[View Delegates](#)  
[Add Delegate](#)  
[Training Diary](#)  
[Holiday Planner](#)

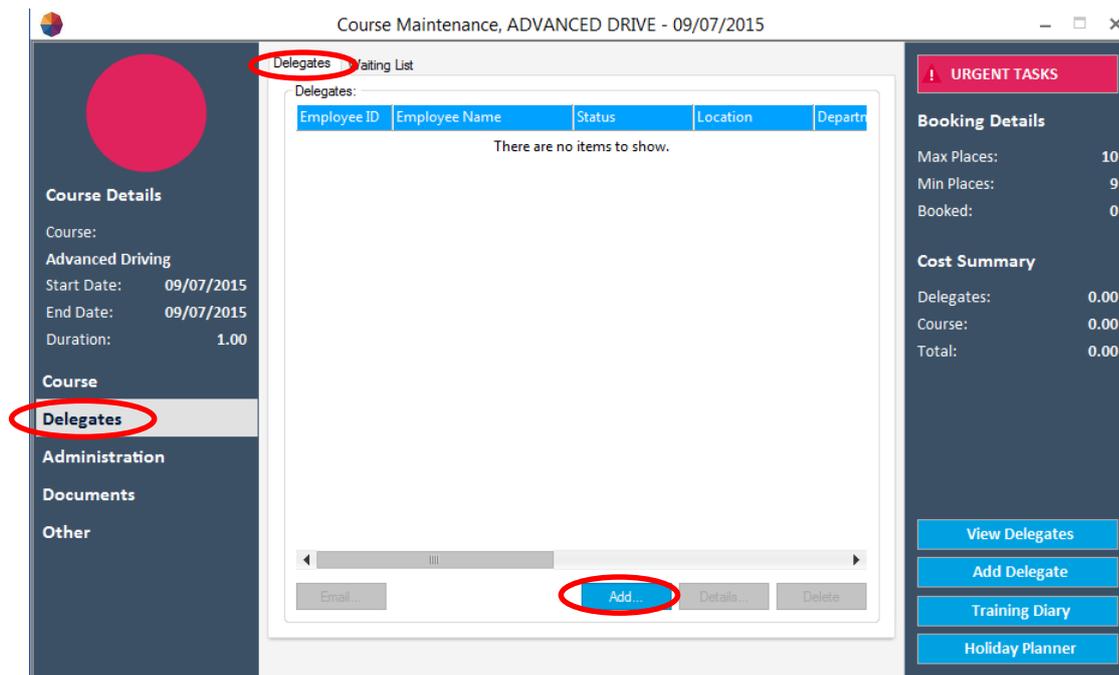
**Course Details**  
 Course: **Advanced Driving**  
 Start Date: 09/07/2015  
 End Date: 09/07/2015  
 Duration: 1.00

**Course**  
 Delegates  
 Administration  
 Documents  
 Other

## 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



The screenshot shows a web application window titled "Course Maintenance, ADVANCED DRIVE - 09/07/2015". On the left sidebar, the "Delegates" tab is selected and circled in red. The main content area displays a "Delegates" table with columns for Employee ID, Employee Name, Status, Location, and Department. The table is currently empty, showing "There are no items to show." At the bottom of the table, the "Add..." button is circled in red. On the right sidebar, there are sections for "URGENT TASKS", "Booking Details" (Max Places: 10, Min Places: 9, Booked: 0), and "Cost Summary" (Delegates: 0.00, Course: 0.00, Total: 0.00). Below these are buttons for "View Delegates", "Add Delegate", "Training Diary", and "Holiday Planner".

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

**Employee Search**

Employee Search
Employee Tree

**Training Need:**

**Status:**

**Target Date Between:**

 and

Search Results:

ID	Surname	Other Names	Department	Location
1	Abbott	Albert	Management	London
2	Adams	Matthew	Sales	London
25	Ainsworth	Julie	Sales	London
26	Alcock	Vicky	Sales	London
3	Bathley	Catherine	Management	London
4	Beasley	James	Management	London
29	Brown	James	Production	London
32	Burton	Domonik	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
17	Eden	John	Production	Leeds
11	Emmerson	Kieth	Sales	London
18	Empson	Phillip	Production	Leeds
13	Falkner	Sam	Production	London
31	Glover	Jane	Sales	London
19	Graham	Jane	Administration	Leeds

**Main**

**Date**

**Work**

**Dept/Loc**

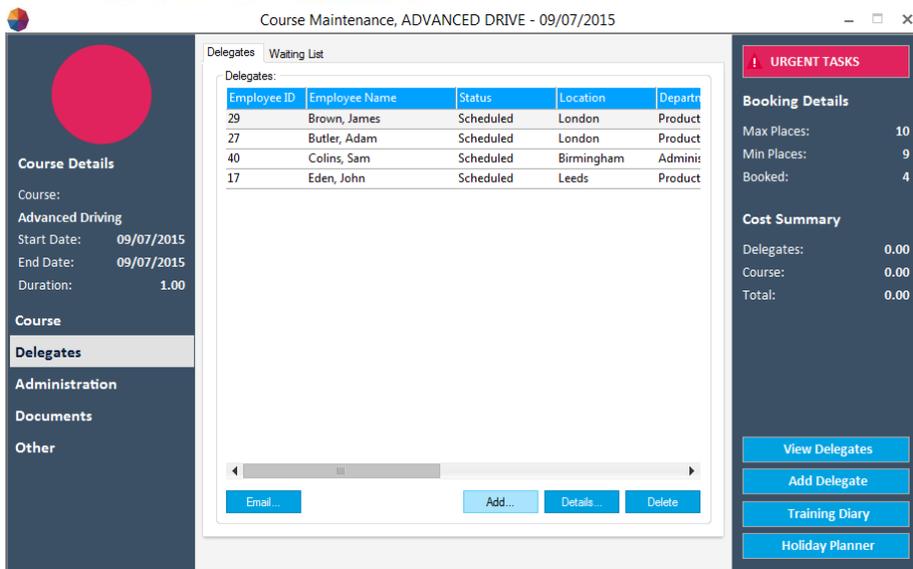
**Course**

**Training Needs**

Search
Select
Close
Clear All

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.

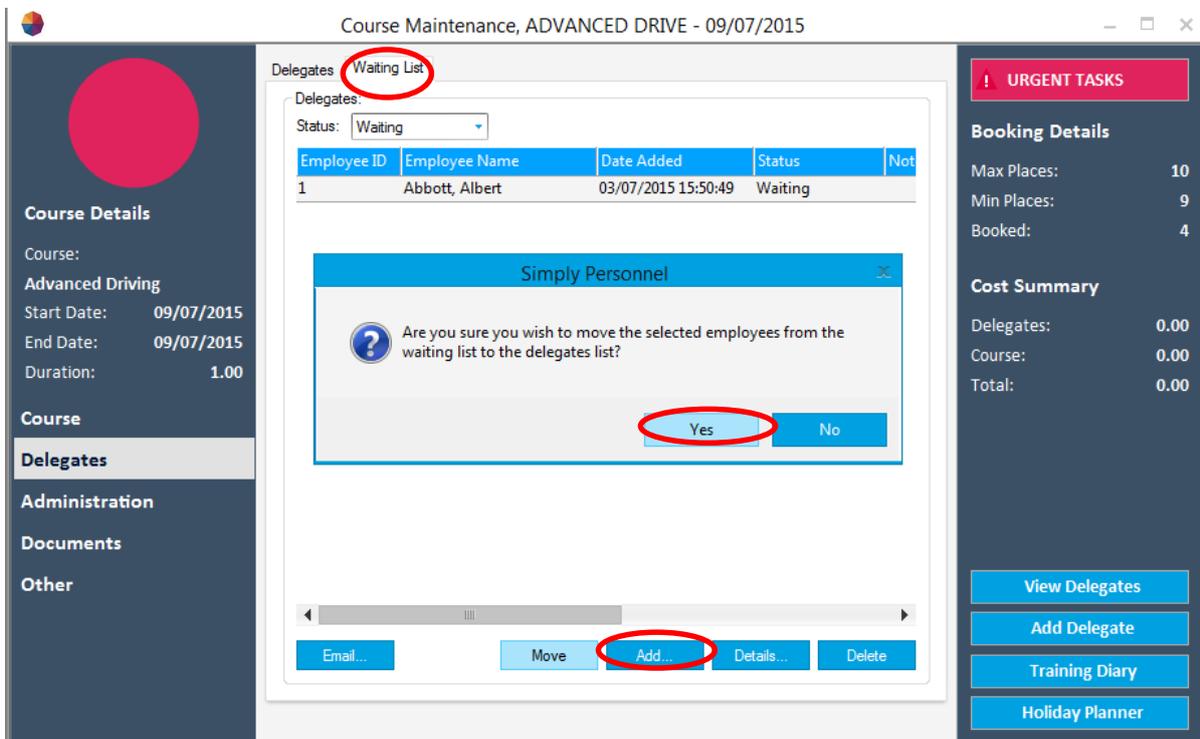
To change the status of a delegate double click into their delegate account you will see a status drop down this will be covered in the delegate maintenance section of the document.



## 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.



- 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

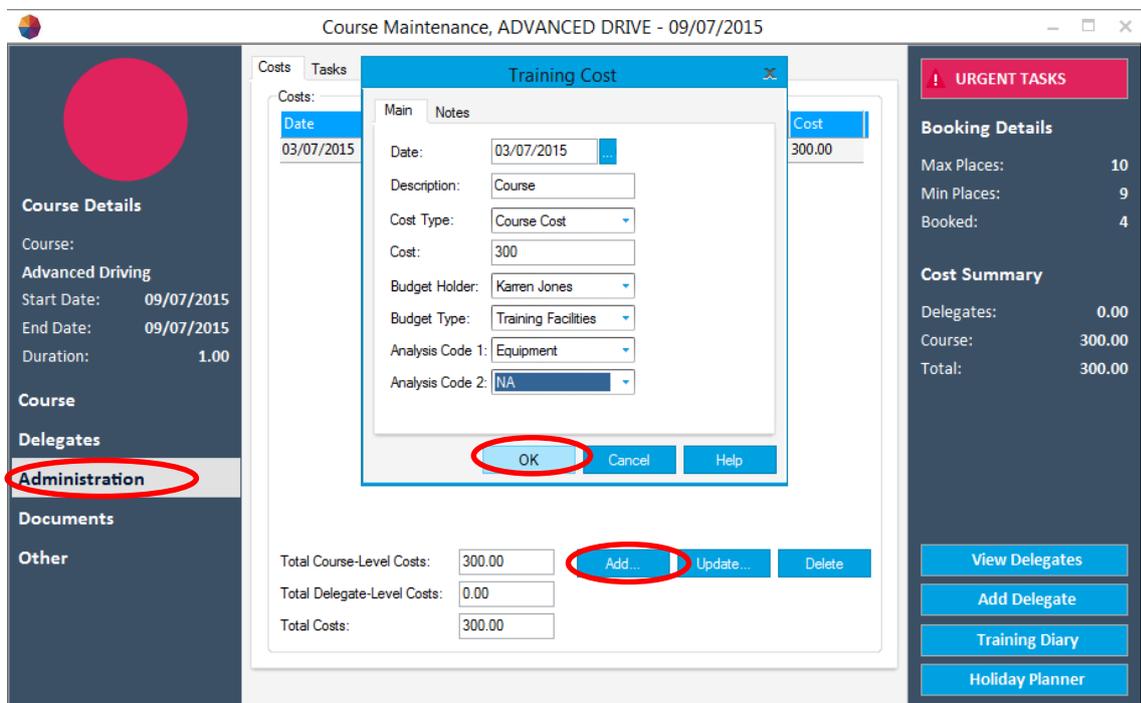


On both the delegate tab and the waiting list tab you will see a delete function this will delete the employee completely from the course

### Costs

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.



The screenshot shows the 'Course Maintenance, ADVANCED DRIVE - 09/07/2015' window. On the left sidebar, the 'Administration' tab is highlighted. The main area displays a 'Training Cost' dialog box with the following details:

- Date: 03/07/2015
- Description: Course
- Cost Type: Course Cost
- Cost: 300
- Budget Holder: Karren Jones
- Budget Type: Training Facilities
- Analysis Code 1: Equipment
- Analysis Code 2: N/A

The 'OK' button in the dialog is circled in red. Below the dialog, the 'Add...' button in the cost summary table is also circled in red.

Costs	Date	Cost
	03/07/2015	300.00

Summary Table:

Total Course-Level Costs:	300.00	Add...	Update...	Delete
Total Delegate-Level Costs:	0.00			
Total Costs:	300.00			

Right-hand side summary:

**URGENT TASKS**

**Booking Details**

- Max Places: 10
- Min Places: 9
- Booked: 4

**Cost Summary**

- Delegates: 0.00
- Course: 300.00
- Total: 300.00

Buttons: View Delegates, Add Delegate, Training Diary, Holiday Planner

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

Course Maintenance, ADVANCED DRIVE - 09/07/2015

**Course Details**

Course:  
Advanced Driving

Start Date: 09/07/2015  
End Date: 09/07/2015  
Duration: 1.00

**Course**

Delegates

**Administration**

Documents

Other

Costs    Tasks    Qualifications

Costs:

Date	Cost Type	Description	Cost
03/07/2015	Delegate Cost	Course	300.00

Total Course-Level Costs:            

Total Delegate-Level Costs:

Total Costs:

**URGENT TASKS**

**Booking Details**

Max Places: 10  
Min Places: 9  
Booked: 4

**Cost Summary**

Delegates: 0.00  
Course: 300.00  
Total: 300.00

## Tasks

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.

Course Maintenance, ADVANCED DRIVE - 09/07/2015

**Course Details**

Course:  
Advanced Driving

Start Date: 09/07/2015  
End Date: 09/07/2015  
Duration: 1.00

**Course**

Delegates

**Administration**

Documents

Other

Costs    **Task**    Qualifications

Tasks:

Tasks	Date	Task	Notes
	10/06/2015	Book Trainer	
	19/06/2015	Book Training Room	
	19/06/2015	Book Equipment	
	30/06/2015	Send Evaluation Forms	
	30/06/2015	Order Refreshments	
	20/07/2015	Receive Delegates Evaluation Forms	

**URGENT TASKS**

**Booking Details**

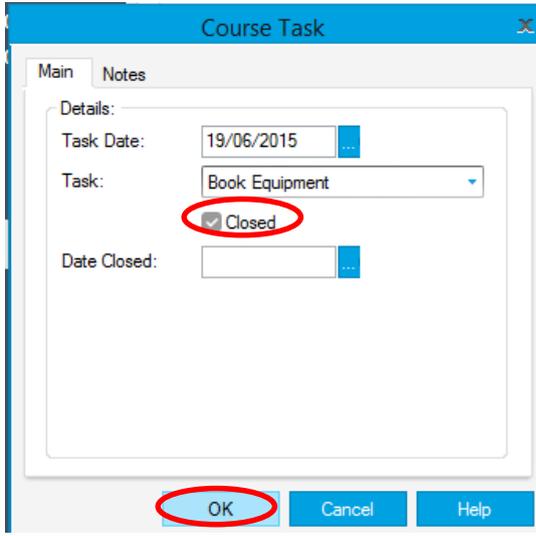
Max Places: 10  
Min Places: 9  
Booked: 4

**Cost Summary**

Delegates: 0.00  
Course: 300.00  
Total: 300.00

- To close double click
- Tick close

- Click ok



Course Task

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

Course Maintenance, ADVANCED DRIVE - 09/07/2015

Costs Tasks **Qualifications**

Qualification	Subject	Grade
NA	Fork Lift Truck Driving	Pass

**Qualification Details**

Details:

Qualification:

Subject:

Grade:

Establishment:

Notes:

Expires In:  Years

**URGENT TASKS**

**Booking Details**

Max Places: 10

Min Places: 9

Booked: 4

**Cost Summary**

Delegates: 0.00

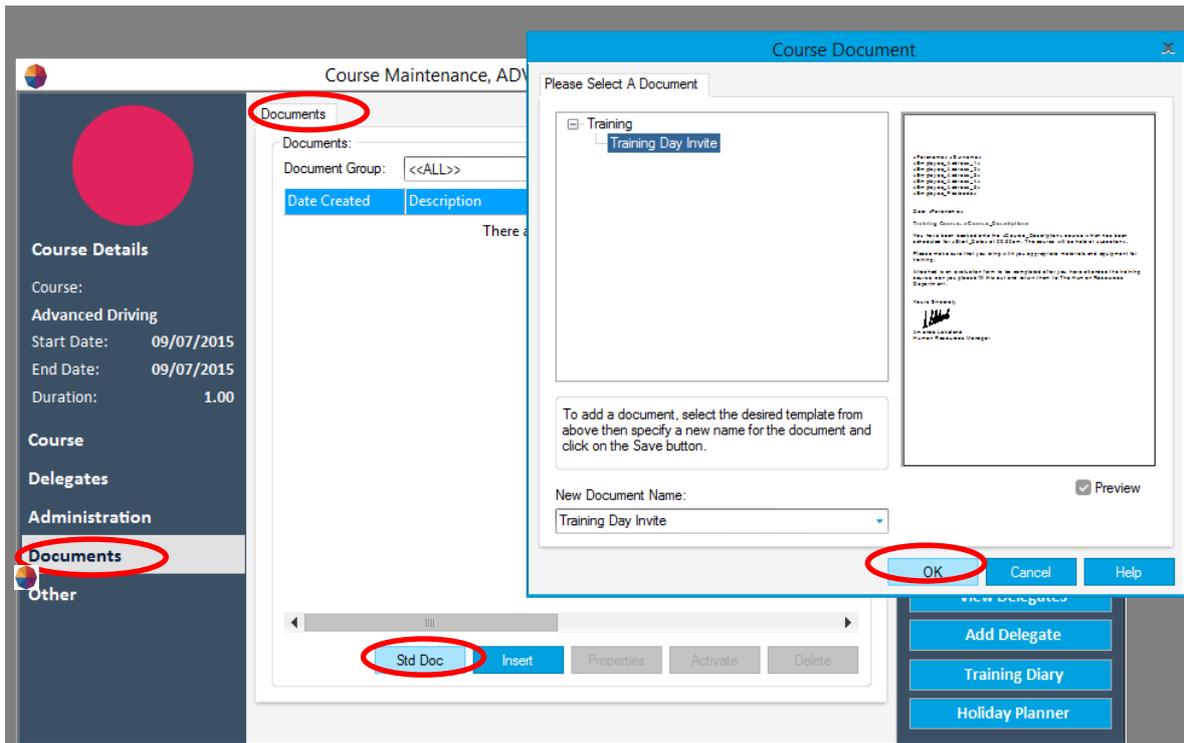
Course: 300.00

Total: 300.00

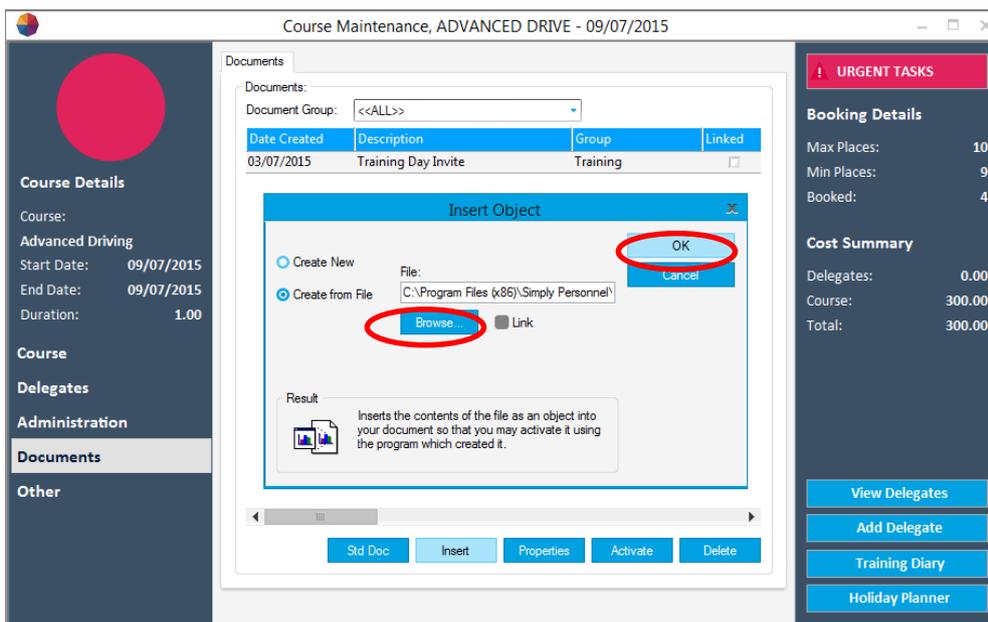
## Documents

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.



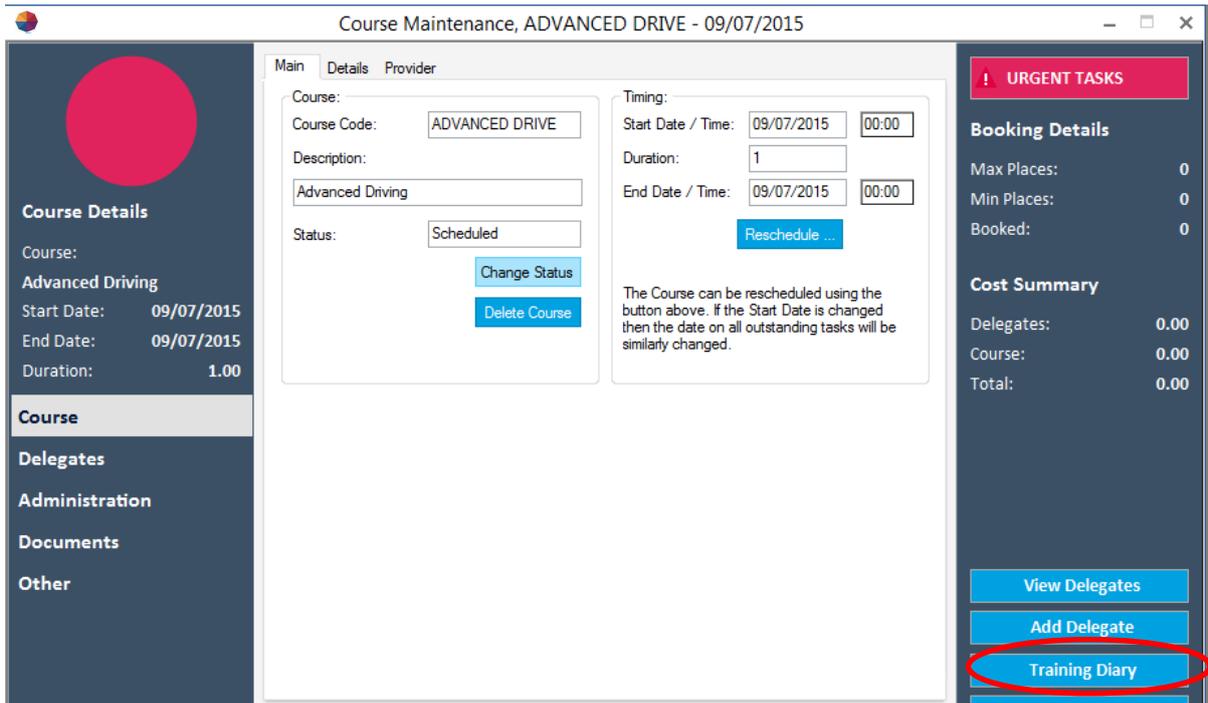
- Select browse to locate a document from another location



## 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, ADVANCED DRIVE - 09/07/2015**

**Course Details**

Course: Advanced Driving  
 Start Date: 09/07/2015  
 End Date: 09/07/2015  
 Duration: 1.00

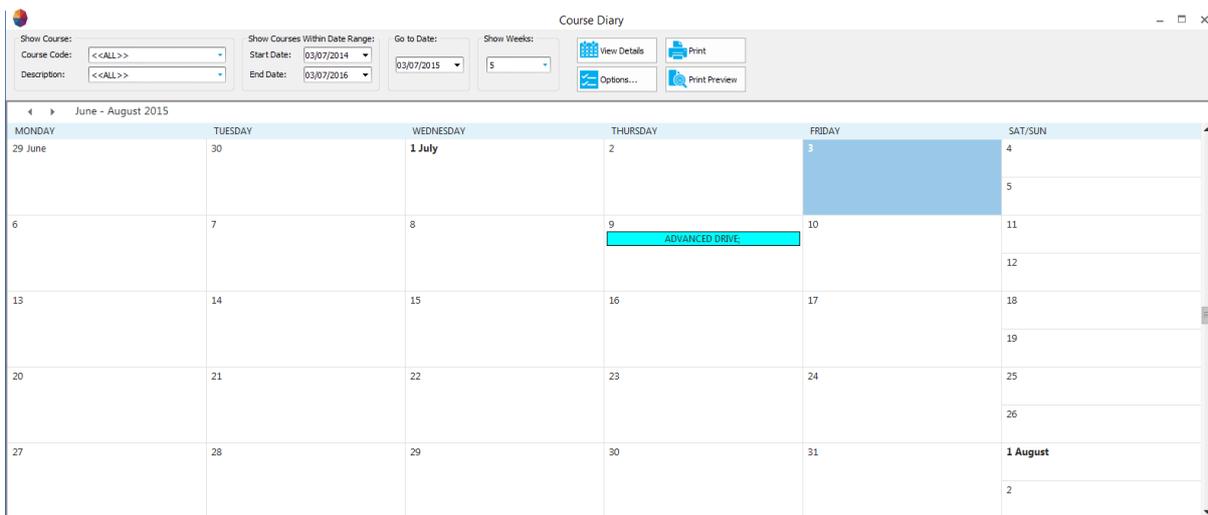
**Booking Details**

Max Places: 0  
 Min Places: 0  
 Booked: 0

**Cost Summary**

Delegates: 0.00  
 Course: 0.00  
 Total: 0.00

**Navigation:** View Delegates, Add Delegate, **Training Diary**



**Course Diary**

Show Course: Course Code: <<ALL>> Description: <<ALL>>  
 Show Courses Within Date Range: Start Date: 03/07/2014 End Date: 03/07/2016  
 Go to Date: 03/07/2015 Show Weeks: 5

View Details, Print, Options..., Print Preview

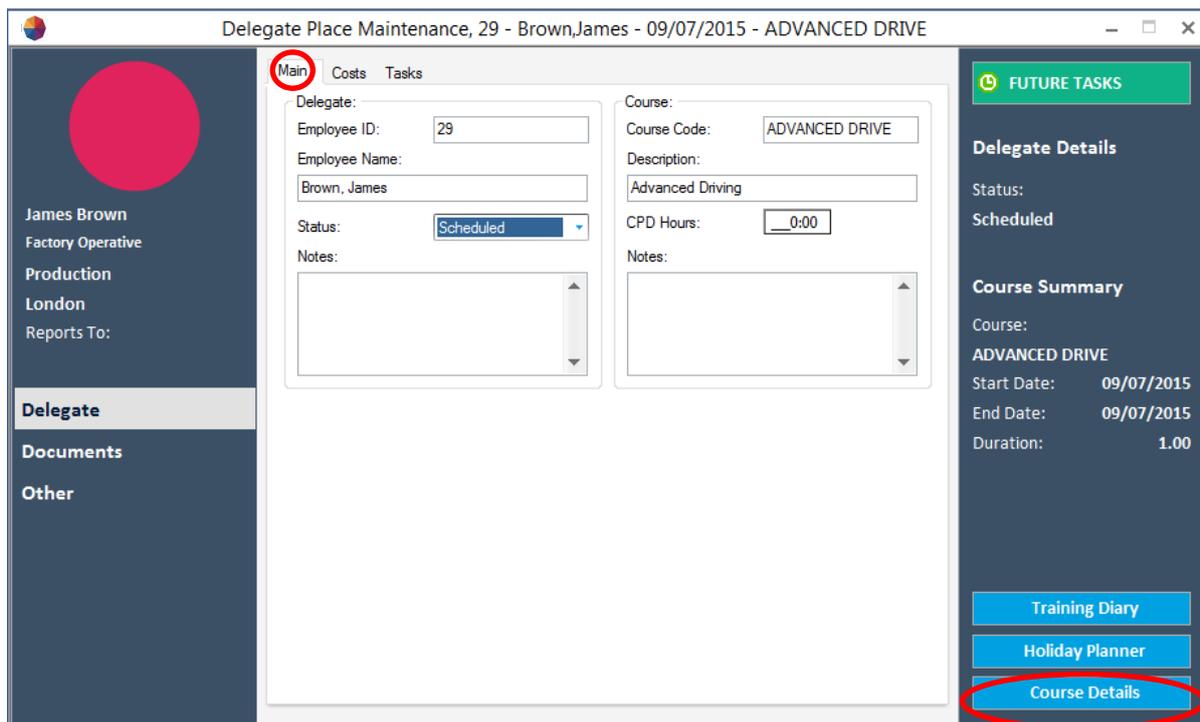
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
29 June	30	1 July	2	3	4
6	7	8	9 ADVANCED DRIVE	10	11
13	14	15	16	17	18
20	21	22	23	24	25
27	28	29	30	31	1 August
					2

## 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.



Delegate Place Maintenance, 29 - Brown,James - 09/07/2015 - ADVANCED DRIVE

**Main** Costs Tasks

Delegate:  
Employee ID: 29  
Employee Name: Brown, James  
Status: Scheduled  
Notes:

Course:  
Course Code: ADVANCED DRIVE  
Description: Advanced Driving  
CPD Hours: 0:00  
Notes:

**FUTURE TASKS**

**Delegate Details**  
Status: Scheduled

**Course Summary**  
Course: ADVANCED DRIVE  
Start Date: 09/07/2015  
End Date: 09/07/2015  
Duration: 1.00

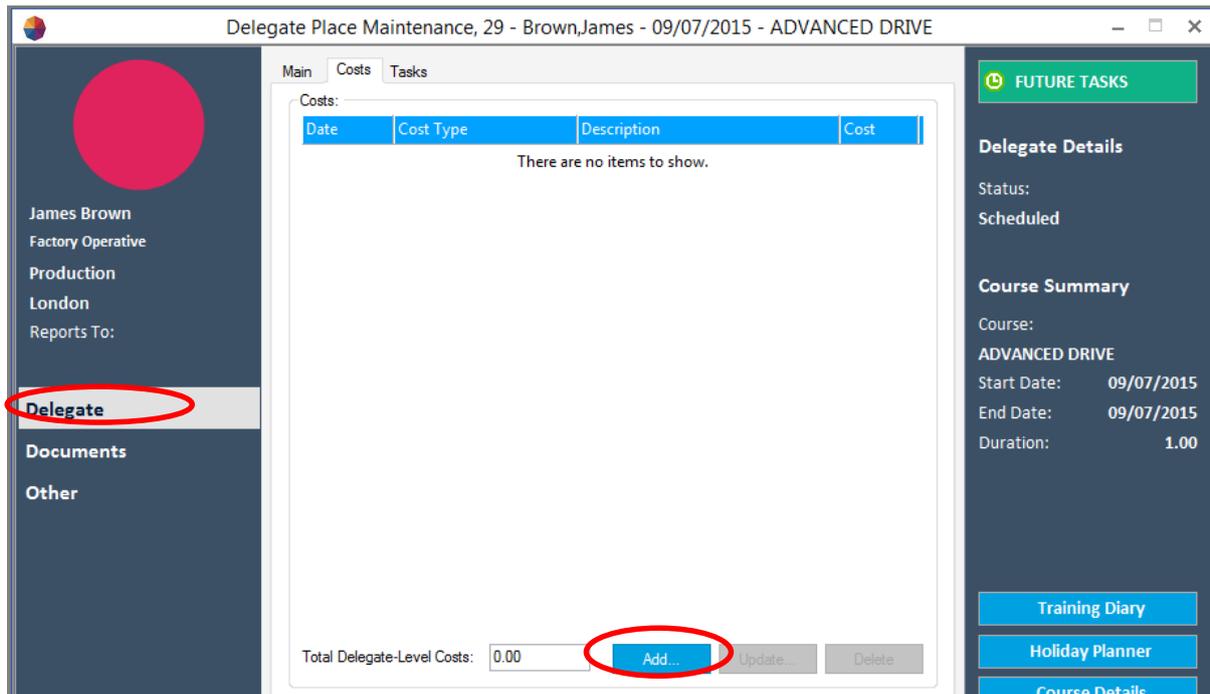
Training Diary  
Holiday Planner  
**Course Details**

This will take the user back to the course maintenance

## Costs

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.



The screenshot shows the 'Costs' tab for 'Delegate Place Maintenance, 29 - Brown, James - 09/07/2015 - ADVANCED DRIVE'. The interface includes a sidebar with 'Delegate' selected, a central table with columns 'Date', 'Cost Type', 'Description', and 'Cost', and a right-hand panel with 'Delegate Details' and 'Course Summary'. The 'Add...' button at the bottom of the table is circled in red.

Date	Cost Type	Description	Cost
There are no items to show.			

Total Delegate-Level Costs: 0.00 **Add...** Update... Delete

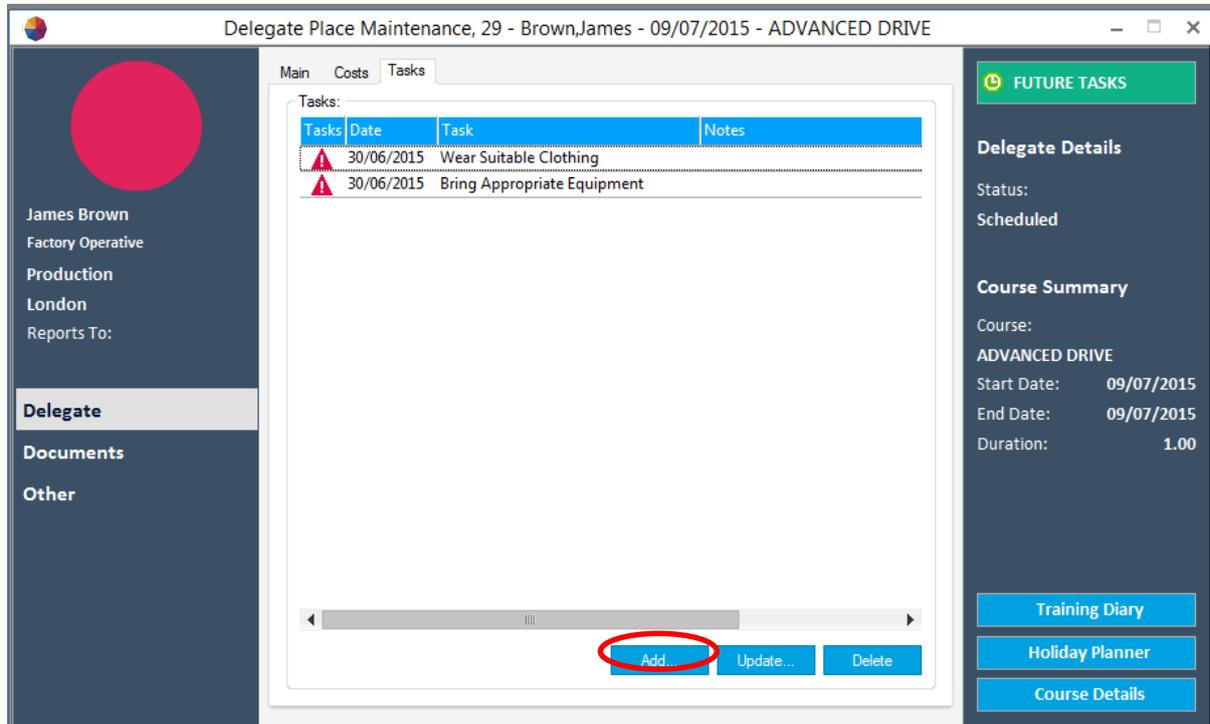


A cost summary will appear in delegate expenses and course expenses.

Cost Summary	
Delegates:	0.00
Course:	100.00
Total:	100.00

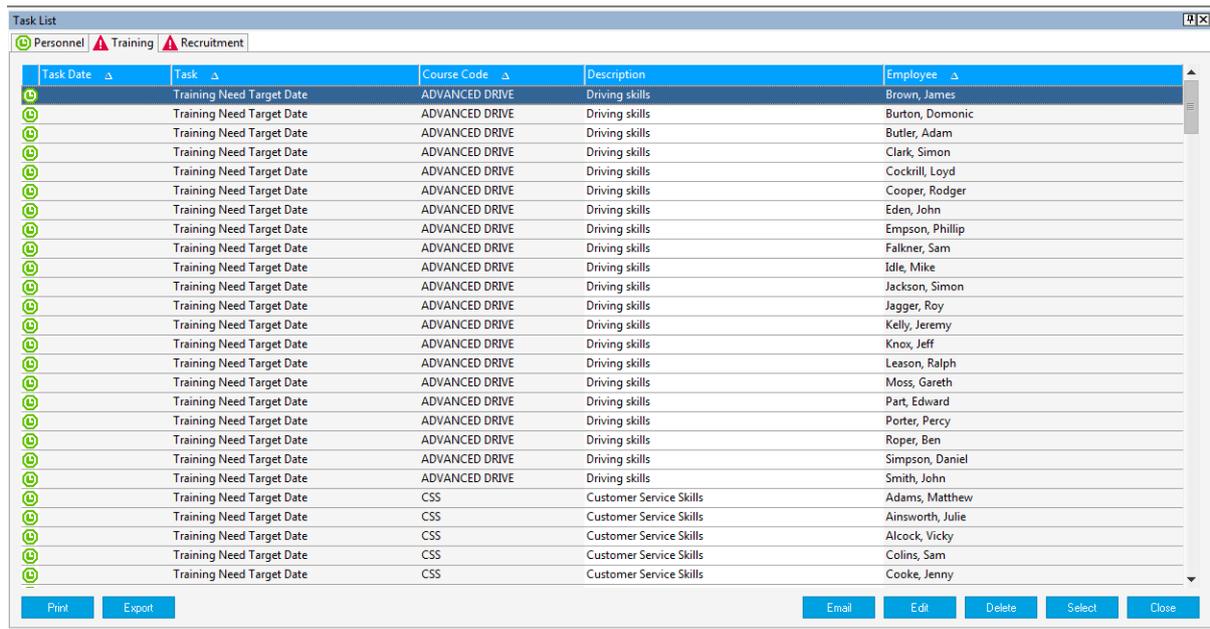
## Tasks

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.



Tasks	Date	Task	Notes
⚠	30/06/2015	Wear Suitable Clothing	
⚠	30/06/2015	Bring Appropriate Equipment	

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



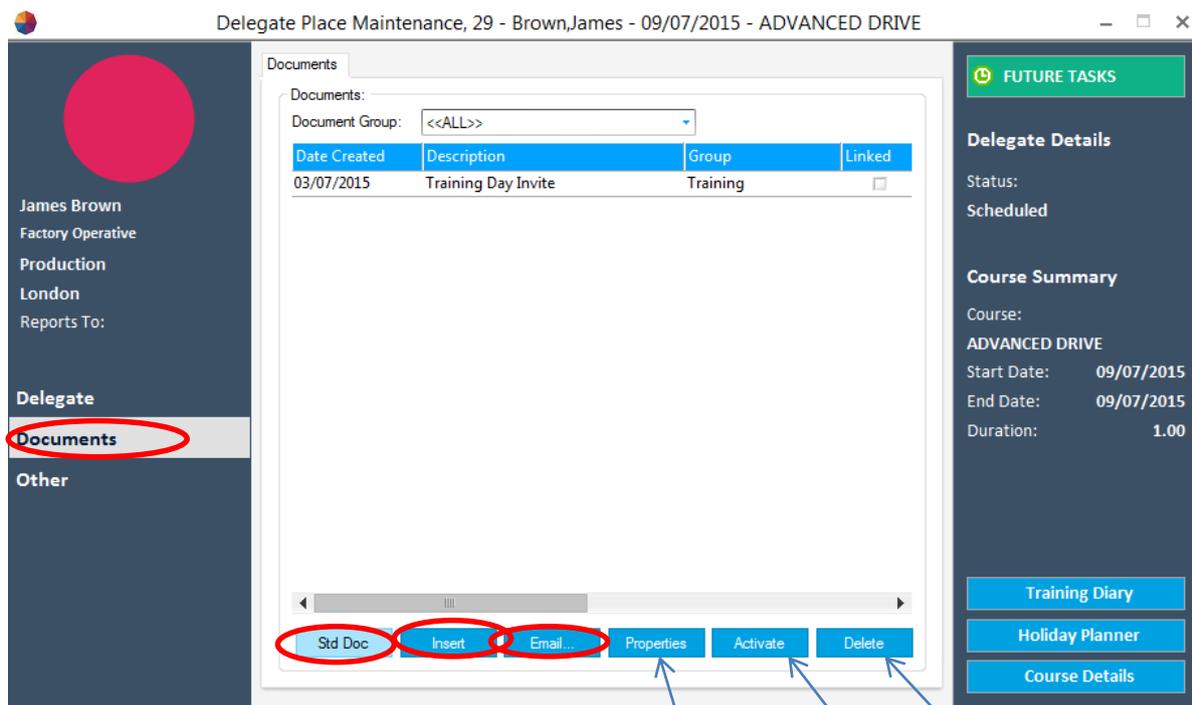
Task Date	Task	Course Code	Description	Employee
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Brown, James
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Burton, Domic
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Butler, Adam
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Clark, Simon
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Cockrill, Loyd
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Cooper, Rodger
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Eden, John
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Empson, Phillip
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Falkner, Sam
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Idle, Mike
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Jackson, Simon
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Jagger, Roy
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Kelly, Jeremy
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Knox, Jeff
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Leason, Ralph
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Moss, Gareth
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Part, Edward
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Porter, Percy
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Roper, Ben
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Simpson, Daniel
Ⓞ	Training Need Target Date	ADVANCED DRIVE	Driving skills	Smith, John
Ⓞ	Training Need Target Date	CSS	Customer Service Skills	Adams, Matthew
Ⓞ	Training Need Target Date	CSS	Customer Service Skills	Ainsworth, Julie
Ⓞ	Training Need Target Date	CSS	Customer Service Skills	Alcock, Vicky
Ⓞ	Training Need Target Date	CSS	Customer Service Skills	Colins, Sam
Ⓞ	Training Need Target Date	CSS	Customer Service Skills	Cooke, Jenny

## 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.



### Inserting a document:

- Select **Insert**
- Browse to the document
- Click ok
- Enter a description for the document

### Existing template

- Select **Std Doc**
- Select the template
- Click ok

To delete the document

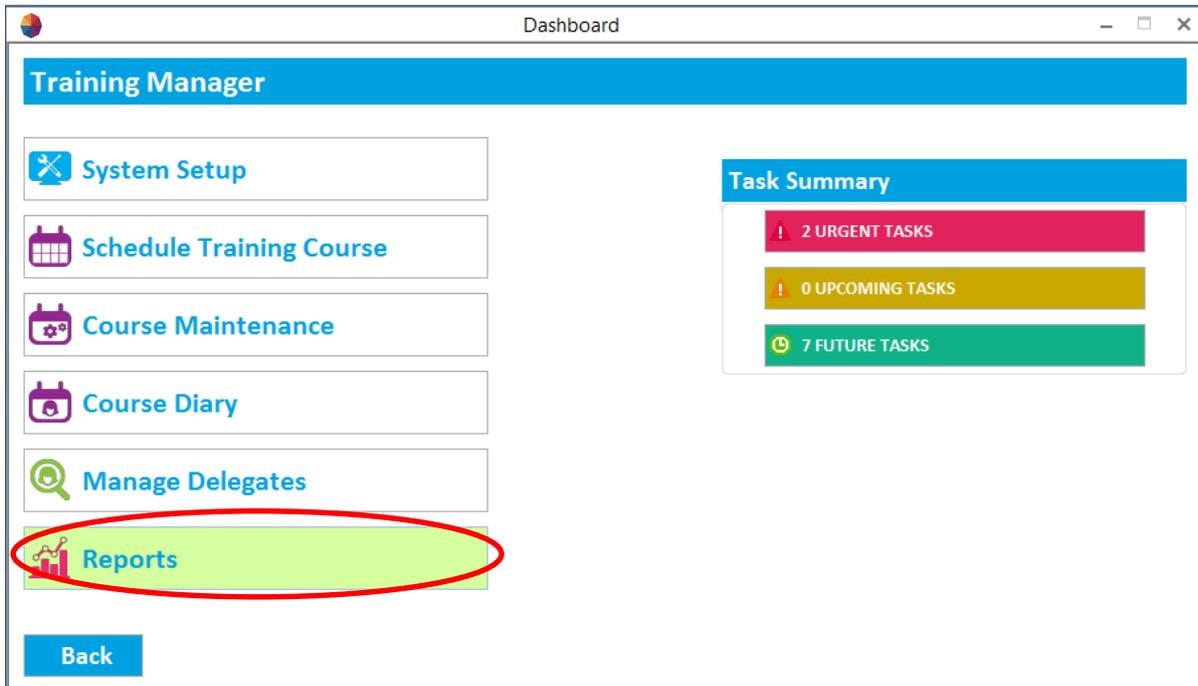
To open the document.

View the properties of the document

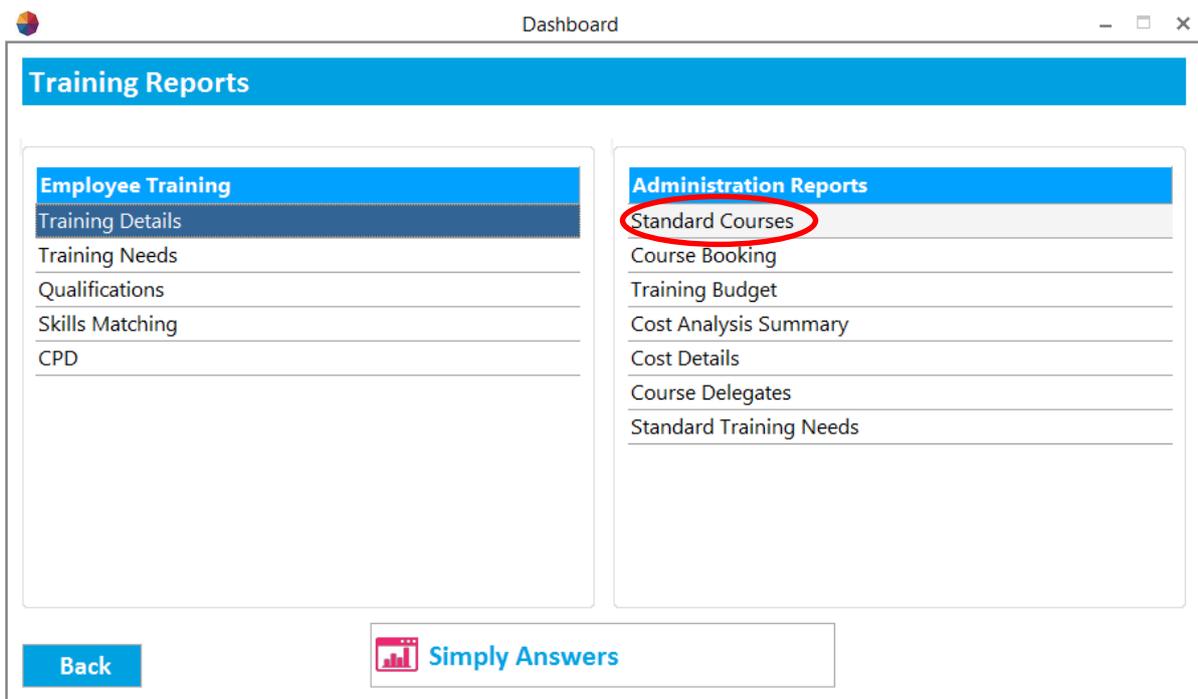
## Reports & Simply Answers

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.

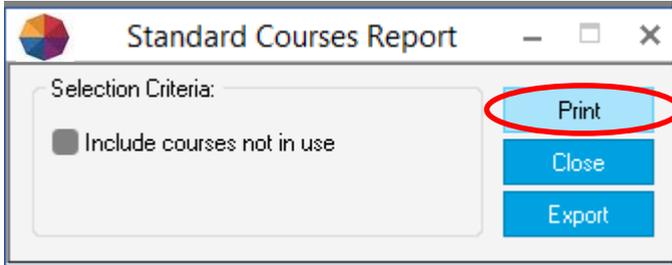
- Select reports from the Main Dashboard.



- Select the a report



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



**Simply Personnel Demo**  
**Standard Courses Report**

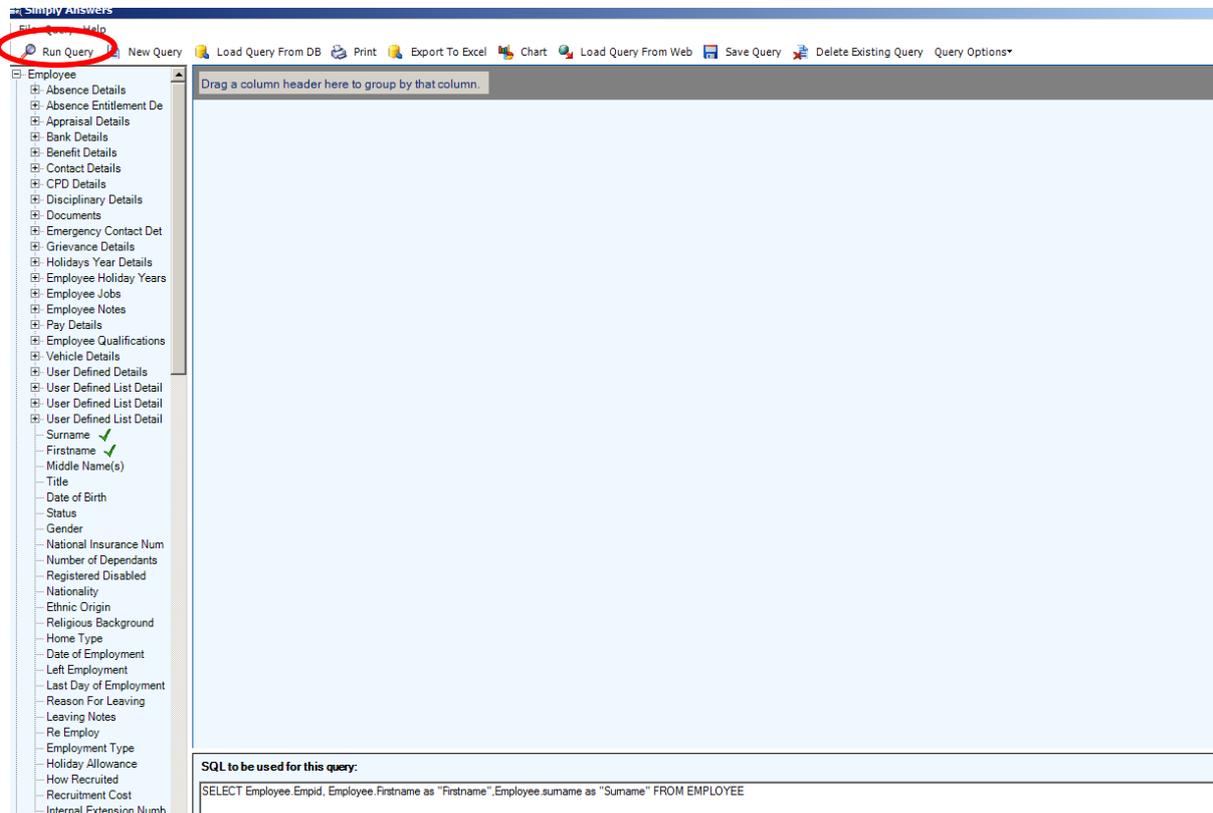
Course Code	Description	Administration	Provider	Trainer Name	Duration	CPD Hours	CPD Accredited
ADVANCED DRIVE	Advanced Driving	External	Open College	Jim Turner	1.00	0.00	No
CSS	Customer Service Skills	External	Excellence in Training	Linda Hardy	1.00	0.00	No
FAID	First Aid	External	Excellence in Training	Jenny Arqinsaw	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
HH	Hard Hats	External	Train with Ease	Mark Dupy	1.00	0.00	No
IND	Induction	Internal		Amenda 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 Jasson	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.



The screenshot shows the 'Simply Answers' application interface. The top toolbar includes buttons for 'Run Query', 'New Query', 'Load Query From DB', 'Print', 'Export To Excel', 'Chart', 'Load Query From Web', 'Save Query', 'Delete Existing Query', and 'Query Options\*'. The 'Run Query' button is circled in red. The left sidebar displays a tree view of data categories, with 'Employee' expanded. Under 'Employee', 'Surname' and 'Firstname' have green checkmarks next to them. The main area contains a text box with the SQL query: 'SELECT Employee.Empid, Employee.Firstname as "Firstname", Employee.surname as "Surname" FROM EMPLOYEE'.

- 'Run Query' to generate the report.

Simply Answers

File Query Help

Run Query New Query Load Query From DB Print **Export To Excel** Chart Load Query From Web Save Query Delete Existing Query Query Options

Employee

Recruitment

Training

- Diarised Courses
  - Tasks
  - Costs
  - Documents
  - Qualifications
  - User Defined Details
  - User Defined List Detail
  - User Defined List Detail
  - User Defined List Detail
    - Course Code
    - Description
    - Start Date
    - Start Time
    - End Date
    - End Time
    - Duration
    - Internal
    - Provider
    - TrainerName
    - Maximum Places
    - Minimum Places
    - Location
    - Status
    - Notes
    - Type
    - Expiry Date
    - CPD Hours
    - CPD Accredited
    - Show On Web
- Delegates
  - Tasks
  - Costs
  - Documents
  - User Defined Details
  - User Defined List Detail
  - User Defined List Detail
  - User Defined List Detail
    - EmployeeID
    - Notes
    - Status
- Waiting List
- TNA Profile
  - TNA Profile
- Training Need
  - Training Need
  - Course Code
  - Target Date

Drag a column header here to group by that column.

empid	Course Code	Description	Start Date	Surname	Firstname	Department	Location
999	70-680	Windows 7	29/10/2014	Benton	Donald	Customer Services	Head Office
999	ILM	ILM	05/11/2014	Benton	Donald	Customer Services	Head Office
68	70-680	Windows 7	11/11/2014	Blalock	Katie	Development	Head Office
68	70-680	Windows 7	17/12/2014	Blalock	Katie	Development	Head Office
19	ILM	ILM	05/11/2014	Boswell	Marguerite	Administration	QA Office
86	70-680	Windows 7	29/10/2014	Bowles	Karen	Quality Assurance	QA Office
11	70-680	Windows 7	17/12/2014	Briggs	Albert	Sales	Head Office
34	ILM	ILM	05/11/2014	Buchanan	Hilda	Administration	Head Office
34	70-680	Windows 7	17/12/2014	Buchanan	Hilda	Administration	Head Office
33	70-680	Windows 7	11/11/2014	Cannon	George	Administration	Head Office
33	70-680	Windows 7	27/08/2014	Cannon	George	Administration	Head Office
93	70-680	Windows 7	29/10/2014	Cannon	Melvin	Marketing	Head Office
93	70-680	Windows 7	29/08/2014	Cannon	Melvin	Marketing	Head Office
28	ILM	ILM	05/11/2014	Carter	Terri	Customer Services	Head Office
89	70-680	Windows 7	27/08/2014	Chan	Tracey	Development	Head Office
49	70-680	Windows 7	27/08/2014	Chappell	Billy	Sales	Head Office
20	Excel 2013	Excel 2013	28/11/2014	Coble	Jane	Administration	Head Office
7	70-680	Windows 7	27/08/2014	Connolly	Dolores	Quality Assurance	QA Office
18	70-680	Windows 7	27/08/2014	Crabtree	Allison	Administration	Head Office
18	Excel 2013	Excel 2013	28/11/2014	Crabtree	Allison	Administration	Head Office
8	Excel 2013	Excel 2013	28/11/2014	Davis	Sherry	Administration	Head Office
45	Excel 2013	Excel 2013	28/11/2014	Drake	Charlie	Administration	Head Office
60	Excel 2013	Excel 2013	28/11/2014	Hunter	Susan	Administration	Head Office

SQL to be used for this query:

```
SELECT Employee.empid,DiariedCourse.CourseCode as "Course Code",DiariedCourse.[Description] as "Description",
DiariedCourse.StartDate as "Start Date",
Employee.surname as "Surname",Employee.Firstname as "Firstname",
Employee.Jobs.Department as "Department", Employee.Jobs.Location as "Location"
FROM //Employee LEFT JOIN DELEGATES & CPD ON Employee.Empid = Delegates.Places.EmployeeID
```

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.

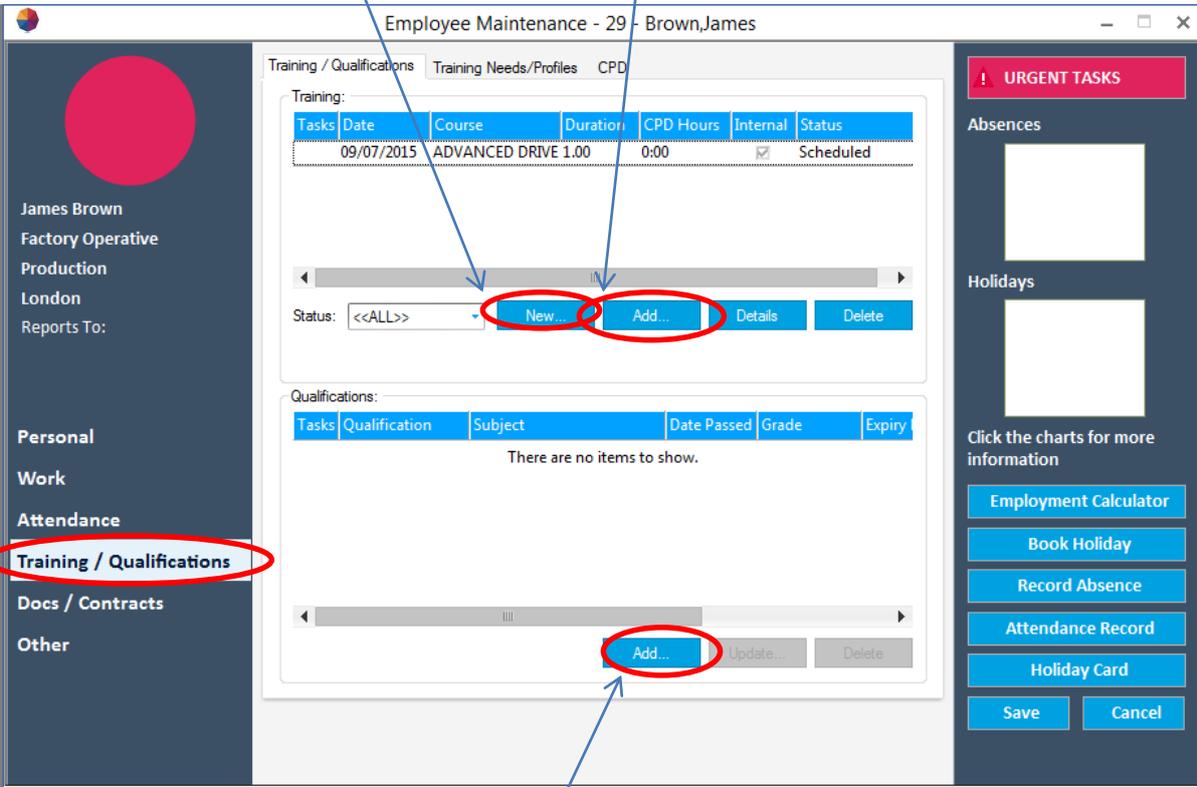
### Training/Qualifications

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.

Create a new course by selecting 'New'

Add an employee to a scheduled course by selecting 'Add'

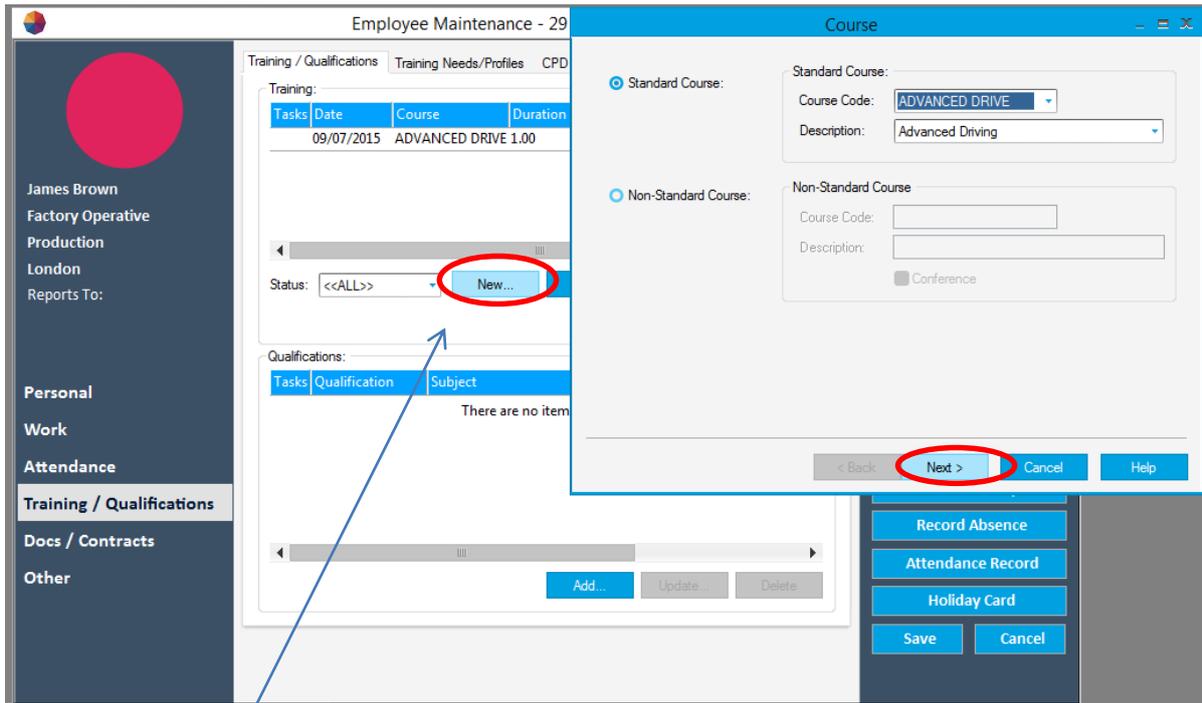


The screenshot shows the 'Employee Maintenance - 29 - Brown, James' window. The left sidebar has a red circle around the 'Training / Qualifications' tab. The main content area has two sections: 'Training' and 'Qualifications'. The 'Training' section contains a table with the following data:

Tasks	Date	Course	Duration	CPD Hours	Internal	Status
	09/07/2015	ADVANCED DRIVE 1.00	0:00		Internal	Scheduled

Below the table are buttons for 'New', 'Add...', 'Details', and 'Delete'. The 'Add...' button is circled in red. Below the 'Qualifications' section, there is an 'Add...' button, also circled in red. A red box highlights the 'Training / Qualifications' tab in the sidebar. Arrows point from the text boxes above to the 'New' and 'Add...' buttons.

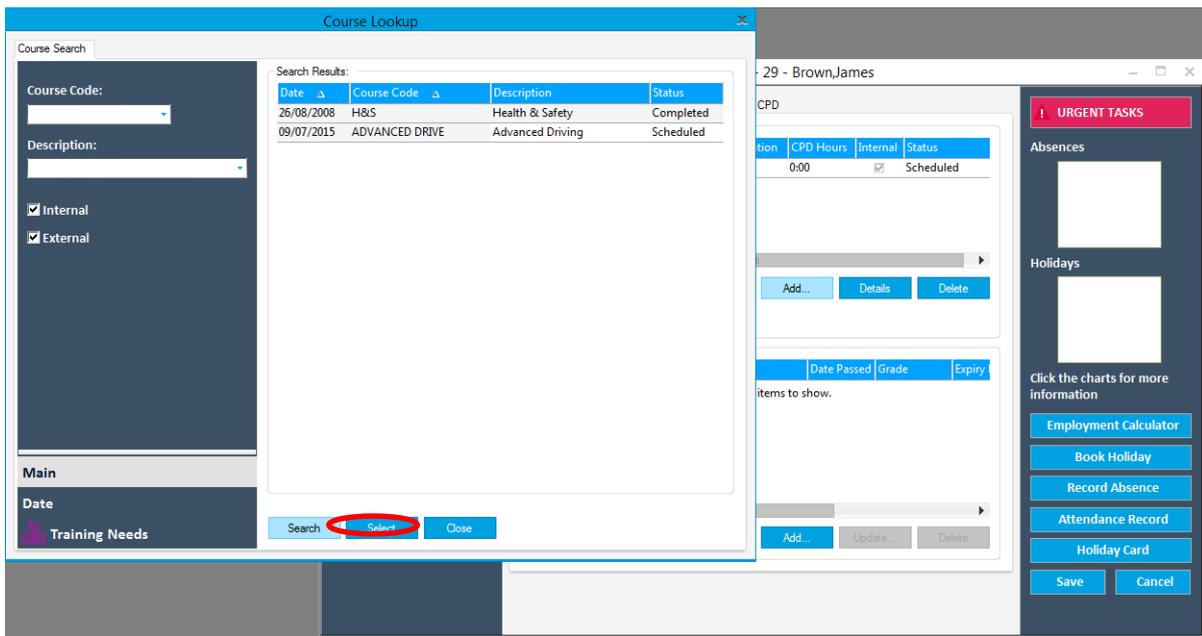
To add new qualifications go to the qualifications section and select add. If an Expiry date is entered it will generate a task when the expiry date arrives.



'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.





## **My Notes**