

Introduction

Standard ERP contains a role based training management system for employees, based on the job title assigned on the Employee record.

The system allows you to set up training topics, including contents, hyperlinks, attachments or even links to our internal document management system, allowing trainers to immediately understand the contents and access any materials required.

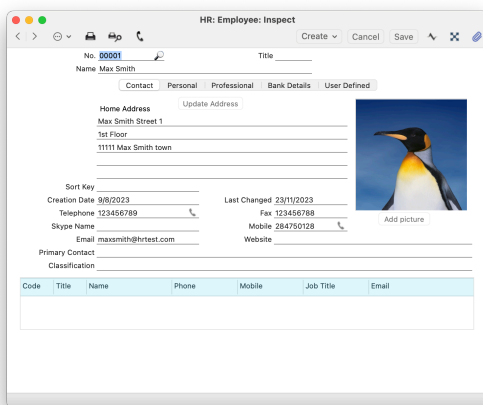
You can create training packs per job position, consisting of the training topics you set up. That allows you to create training plans for your employees with the click of a button. Reports are developed to help find trainers, schedule trainings and report on the employee's progress.

Set up

Employees:

Employee records are in the Human Resources Management module > Register > 'Employees'. These records are a mirror of the Contacts register.

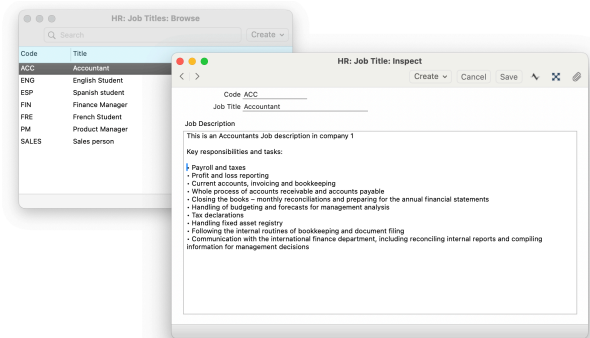
To create a new Employee record, enter a Contact record, and tick the 'Employee' checkbox. Any updates to a Contact record will automatically be reflected in the Employee record and vice versa. The Employee record contains less data than the Contact record of the same person, as only HR relevant information is displayed.



Job Titles:

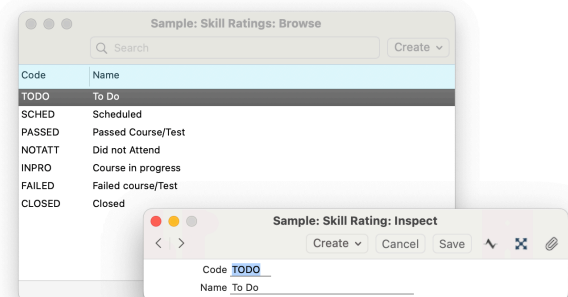
To set up job titles, go to Human Resources Management module > Settings > Job Titles.

This setting is very simple, you enter a code, name and optionally, a job description.



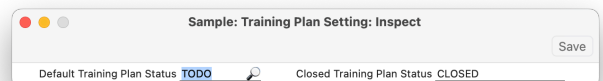
Setting up Training Plan Status:

Training plan statuses are set up in Settings > Skill Ratings.



To use the automatic functions when creating training plans you need to set up at least 2 statuses.

These two statuses then can be filled in the Setting > Training Plan Setting.



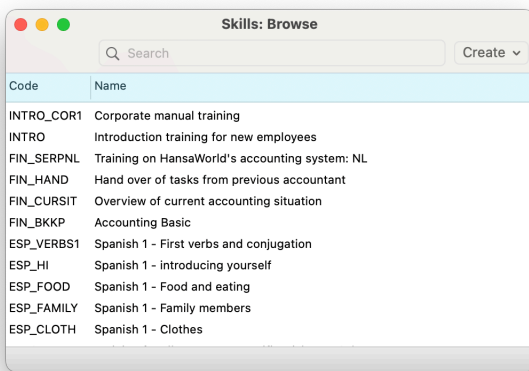
First, set up a default status. Training plans created automatically from the Employee record will be assigned the default status. Leaving this field empty means there are still training plans created, but the status is empty.

Additionally, you can set up a status for Closed training plans. When terminating an employment contract, any outstanding training plan will automatically get a 'Closed' status assigned.

Going back to the Setting > Skill Ratings, you can be more detailed and add more statuses for reporting and scheduling purposes. Examples are: Scheduled, Done, Did not attend etc, depending on how detailed you want to keep track of employee trainings.

Training Topics:

Training topics are set up in the Human Resources Management module > Settings > Skills.

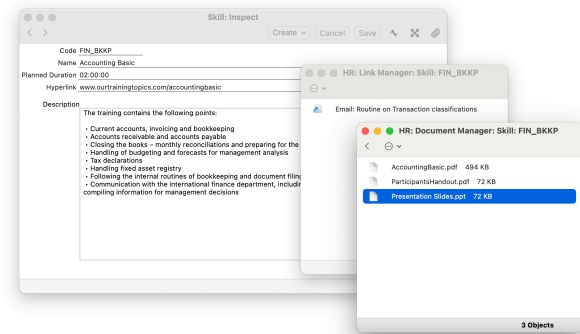


This Skills setting has broad functionality, and is used for 2 purposes:

1. To set up the training contents.
2. To keep track of who is a trainer in a specific topic; with help of the Skills Evaluation register.

When you create a new skill it requires a code to be given. The code can be numbers, letters or a combination. For example, a company could go for a number series or use department short codes, to easier group them.

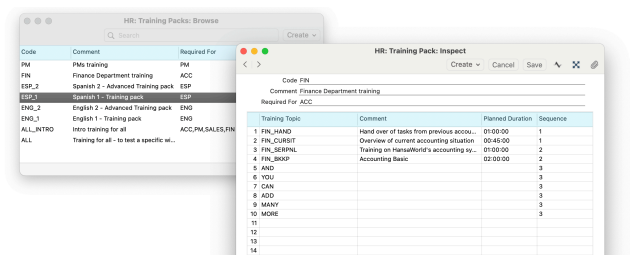
Enter a name and duration for the relevant training. You can enter a description, outline or table of contents in the description field.



Additionally you can add hyperlinks, attach files like training materials, presentations or handouts, and you can link internal documents like emails, or even records. When scheduling a training for this topic the trainer will immediately have access to all information they need to hold a successful training. Create as many skills records as you want to teach and/or measure knowledge for.

Training Packs:

Training packs are a collection of skills needed for a specific job position. The system is flexible and depending on your needs, you can either set up several Training packs for blocks of sessions; for example a training pack for introductory training, another one for sales, a third for accounts. Or, you can set up a larger comprehensive training pack per job position. Using the example of accountants, you can create a training pack comprising of all topics an accountant needs to know in your company, including intro, basic accounting topics, year end topics.



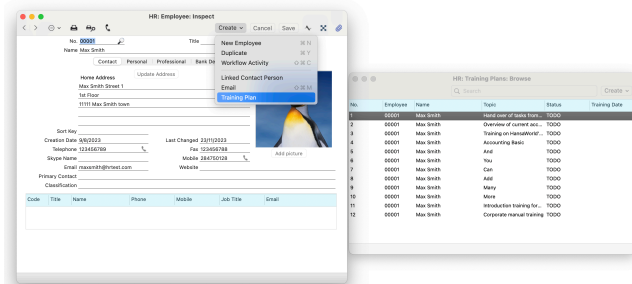
Give the training pack a code and name and paste which topics, or skills, shall be included in the pack into the matrix. You can assign a sequence when some topics should be a prerequisite for others.

Finally, to set up the automatic creation of training plans per employee, fill in which job titles the training pack is required for. This is the setting linking the training topics to the job title of the employee record.

Creating Training Plans

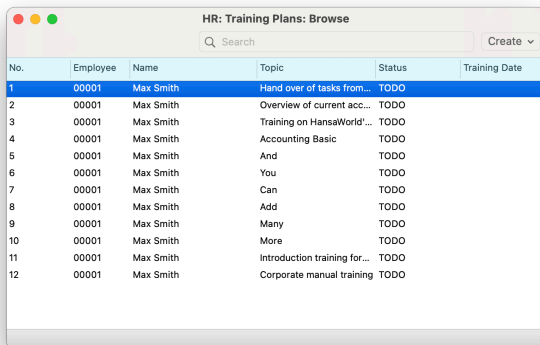
Once the setup is done, training plans can be created with the click of a button.

Go to the record of the employee, and from the Create menu, choose "Training Plans". That creates a list of training courses in the Register > Training Plans, based on what you set up to be required for the job position.

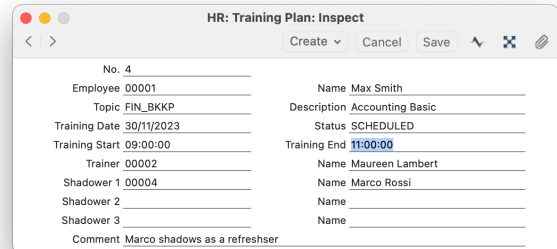


Training Plans Register:

Training plans are created in the Training Plans register. The system creates one plan for each topic in the training pack. That means one employee can have many training plans.



When you open a training plan record, You will see that the Employee, topic and Status are filled in automatically.



Scheduling Trainings:

Trainings can be scheduled in 2 ways.

You can schedule a training directly in the Training Plans register.

- Open the training plan you want to scheduled.
- Fill in the date the training shall take place.
- When you fill in a start time, the end time is filled in automatically, calculated from the duration you defined on the record of the training topic in the setting Skills.
- Add a trainer using paste special.
- Then there are 3 fields for 'shadowers'. That allows you to add additional students to the training plan that shadow the training or trainer, perhaps in an apprentice like situation where the student is receiving training, and a more senior employee is simultaneously learning to be a trainer themselves.

The second way to schedule one, or several training plans at once, is via the report Employee Training.

- Leave Period and Employee empty.
- Fill in a Topic and the Status 'ToDo'. That shows you all not-yet-completed training plans for a specific topic, in case several employees or students still need this training.
- From here you can drill down to the training plans and schedule them with date and time effectively creating group trainings.

Once the training is done, you can change the status to 'Done' if you set up the system like that. This allows you to monitor training progress in reports.

Reporting

There are several reports in the Human Resources Management module that allow you to schedule trainings, monitor the progress of students, and identify trainers.

Employee Training:

The main report to monitor students, training and trainer progress in the Training Management System is the report > Employee Training.

Training Plan	Topic	Description	Status	Training Date	Start Time	End Time
FIN_BKKP	Accounting Basic		Scheduled	30/11/2023	09:00:00	11:00:00
Employee	00001	Max Smith				
Trainer	00002	Maureen Lambert				
Shadower	00004	Marco Rossi				
Shadower						
Comment		Marco shadows as a refresher				
	MANY	Many	To Do			
Employee	00001	Max Smith				
Trainer						
Shadower						
Shadower						
Comment						
	INTRO	Introduction training for new employees	To Do			
Employee	00001	Max Smith				

For a specific period, or any given date you can get information on:

- Which training topics an employee has completed or are has outstanding.
- Which trainings are scheduled on any given day or during a specific period.
- How many trainings a specific trainer has delivered on any given day or during a specific period.
- Which training topics are soon to be scheduled and for whom, and schedule them from the report.
- How often an employee has shadowed a specific training. Maybe they soon are ready to be a trainer themselves.
- Depending on the setup, you can check which employee or student is often not attending trainings by choosing a corresponding status.

Skills Evaluation:

A second important report is called Skills Evaluation. This report allows you to:

- Check which skills an employee has.
- Find a trainer for a specific topic, by entering the 'Skill' and 'Skill rating' for the trainer.
- Develop future trainers by finding out who has already shadowed a specific training.

Employee	Skill	Comment/Employee Name	Rating
00002	FIN_BKKP	Maureen Lambert	TRAIN
	FIN_CURSIT	Accounting Basic	TRAIN
	FIN_HAND	Overview of current accounting situation	TRAIN
	INTRO_CORE1	Hand over of tasks from previous accountant	TRAIN
		Corporate manual training	SHAD
	Total Skills:	4	