

## Chapter 8

# Employee Training Lookup Lists

Employee Training records currently have just one type of lookup list and that is Training Codes. Training Codes allow your organization to classify the various training activities your employees participate in. These training codes can be organized into training categories. The T.O.M. Employee Management Software comes with an extensive “pre-built” list of training codes that you may use or you can create your own set of training codes.



### ① T.O.M Tip

#### What is the difference between a training category and a training code?

Training codes are subcategories of training categories. For example, one of the prebuilt training categories is Inservice. Some of the prebuilt training codes associated with the Category of Inservice are FILMS/VIDEOS and WORKSHOPS.

The T.O.M. Employee Management software ships with the training lookup lists “predefined” so that you do not have to try and create them yourself.. Because the Employee Management system ships with these lookup lists already in the system, you can literally start using the software right away because you can select from the predefined options. However, if you do not like the values in any of these lookup lists, your organization can easily change them.

## Training Codes

Training codes allow you to group and organize employee training within predefined training activities. For example, a training category of Inservice may have the following training codes: CDL (CDL Training) and DP (District Policy).

The T.O.M. Employee Management software uses the training codes to allow you to search and report on your various training activities. Using training codes, for example, you can ask the T.O.M. software to find all your drivers who are required to attend safety training between a specific date period.

This section explains the following:

- Adding a New Training Code
- Editing or Changing Training Codes to Inactive
- Deleting Training Codes

### Adding a New Training Code

1. Select File>Training Codes (Figure 8-1).

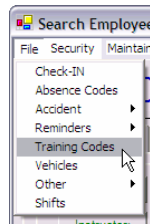


Figure 8-1. Selecting File>Training Codes

The Employee Management system displays the Search Training Codes screen (Figure 8-2).

2. Click the Category pull-down arrow to select the Training Category you want to create a new training code for. For example, if you want to add a training code of Other to the training category of Inservice, select Inservice from the pull-down arrow.

Figure 8-2 shows selecting the Inservice training category:

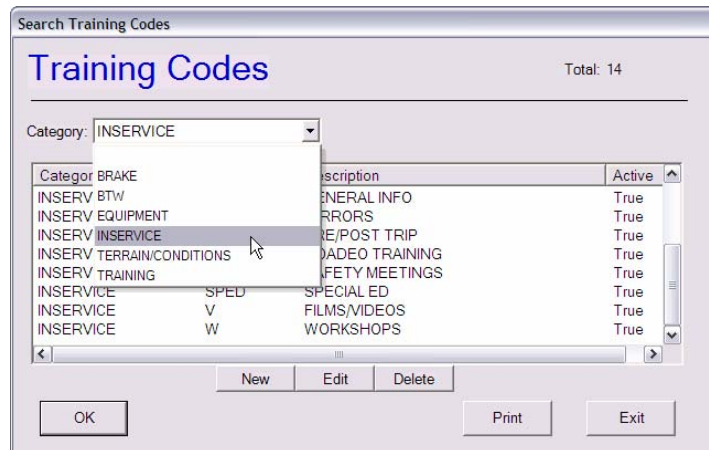


Figure 8-2. Search Training Codes screen

The Employee Management system displays the training codes associated with the selected category.

Figure 8-3 shows the training codes associated with the training category of Inservice:

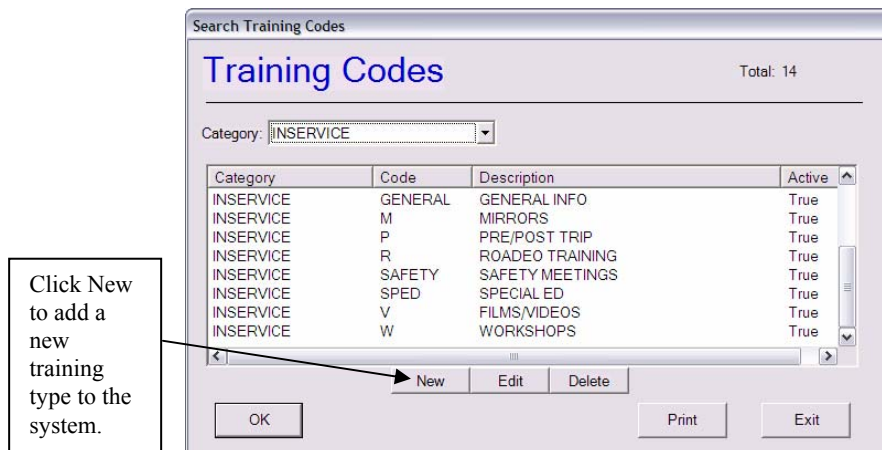




Figure 8-3. Viewing training codes associated with a training category

2. Click the New button. The Employee Management system displays the Training Codes screen.
3. Type the training code and description (Figure 8-4).
  - **Training Code.** Allows you to enter up to 20 alphanumeric characters, meaning you can code both letters and numbers. This is a required field.
  - **Description.** Allows you to enter up to 50 alphanumeric characters.
  - **Active.** When selected, specifies that the training code can be assigned to employee training codes.
4. Make sure the Active checkbox has a check in it. If it does not, the training code will not appear in the Type pull-down list on the Training screen.

Figure 8-4 shows adding a reminder code of Other to the reminder category of Other:

Training Codes

Category: INSERVICE

Code: Other

Description: Other

☒ Active

OK Exit

Click OK to add the training code to the system.

Figure 8-4. Adding a new training code

5. Click the OK button to add the training code to the system.



## Editing or Changing Training Codes to Inactive

In addition to being able to edit training codes, you can change them to inactive. The advantage of changing them to inactive rather than deleting them is that the training code still exists in the system but does not display in the Type pull-down list.

**To edit a training code or change it to inactive:**

1. To edit the training code or change it to inactive, select it and click Edit, or double-click on it to display the Search Training Category screen (Figure 8-5). *If your database has many training codes, you can click the Category pull-down list to display only those training codes associated with the selected category.*

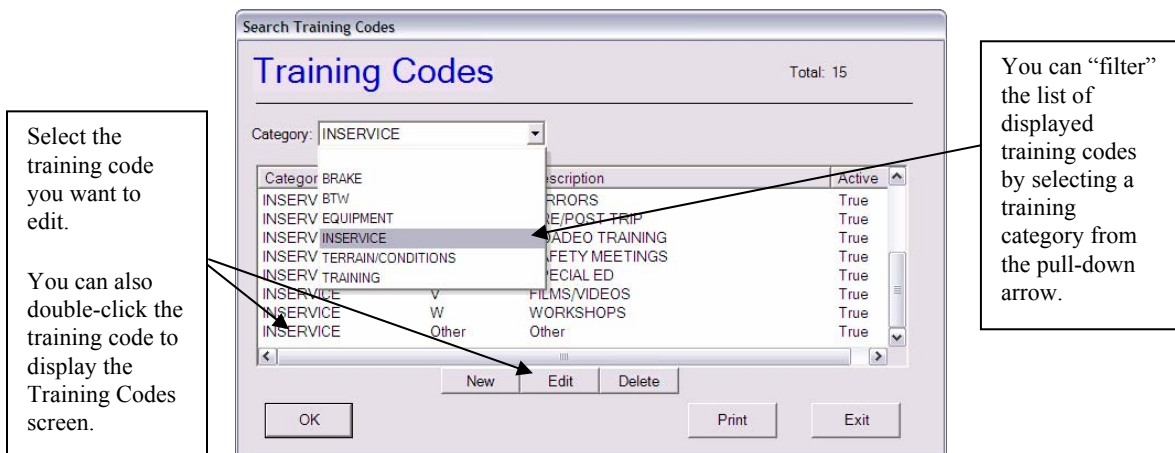


Figure 8-5. Selecting a training code

2. Make your changes to the screen. Figure 8-6 shows that the Training Code of Other has been changed to Inactive:

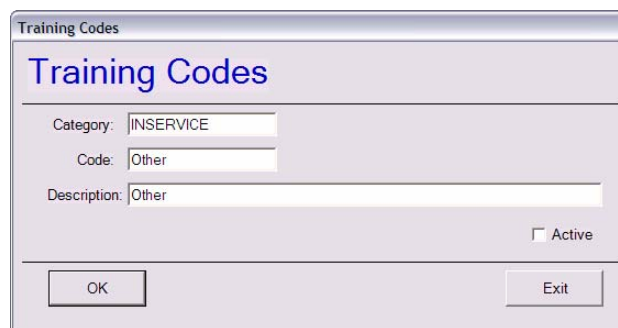


Figure 8-6. Changing a training code to Inactive



## Deleting Training Codes

If you delete training codes, you are removing them from the system. Rather than doing this, you might consider changing them to inactive. That way, the training code still exists in the system but does not appear in the pull-down lists.



### ① T.O.M Tip

#### I tried to delete a training code but couldn't. What am I doing wrong?

The database will not allow you to delete training codes that have been assigned to training records. Therefore, if you have a training code you don't want to use but still have it assigned to training records, you can either change the training code for those training records and then delete it, or you can change the training code's status to inactive by making sure a checkmark does not appear in the Active checkbox on the Training Codes screen.

#### To delete a training code:

1. Select the training code you want to delete. *If your database has many training codes, you can click the Category pull-down list to display only those training codes associated with the selected category.* Figure 8-7 shows clicking the pull-down list.
2. Click the Delete button (Figure 8-7).

Select the training code you want to delete.

Then, click the Delete button.

You cannot delete training codes that have been assigned to training records.

Either change the training codes assigned to those training codes and then delete the training code, or select it, and click Edit. Make sure a checkmark does not appear in the Active checkbox.

Figure 8-7. Deleting a training code

The Employee Management system asks if you are sure to want to delete the training code.

3. Click the Yes button to delete the training code.