Chapter 4

Working with Employee Training

Tracking employee training is a vital part of employee management. For many school organizations, tracking employee training especially driver, mechanics, and bus aide training is required by law. For other organizations, it is not required by law but still an important part of assuring that key employees are qualified to perform sensitive tasks. The T.O.M. Employee Management software has a robust training feature that will greatly assist you to track employee training requirements and achievements.

As discussed in Chapter 2, you can set up reminders for employees, and some of those reminders can be for training. The Employee Management system tracks the number of hours employees must complete as well as the number of hours completed.

The T.O.M. Employee Management software allows you to track your employee training both individually as well as in class groups. When you add training hours to the system for an individual employee or a group of employees, you can apply completed hours to the training reminder. For example, suppose an employee must complete 20 in-service hours and that he just completed five of those hours.

When you add the individual or group training record to the system, you can specify that those five hours be applied to the reminder. The Employee Management system deducts the completed hours, so the reminder now shows that the employee now has 15 hours to complete.

ⓘ ***T.O.M Tip***	**Where can I learn more about reminders?** Refer to Chapter 2 for more information about setting up reminders for individual employees as well as group reminders.

In this chapter, the following topics should help you set up and maintain your district's training records:

- Using the Training Search Screen
- Viewing Training Records for an Individual Employee
- Adding Training Records for Individual Employees
- Adding Training for a Group of Employees
- Editing an Individual Employee's Training Records
- Generating and Printing Training Reports
- Deleting Training Records

Using the Training Search Screen

To access the Training Search screen, click on the Training tab in the Employee search screen (see *Figure 4-1*):

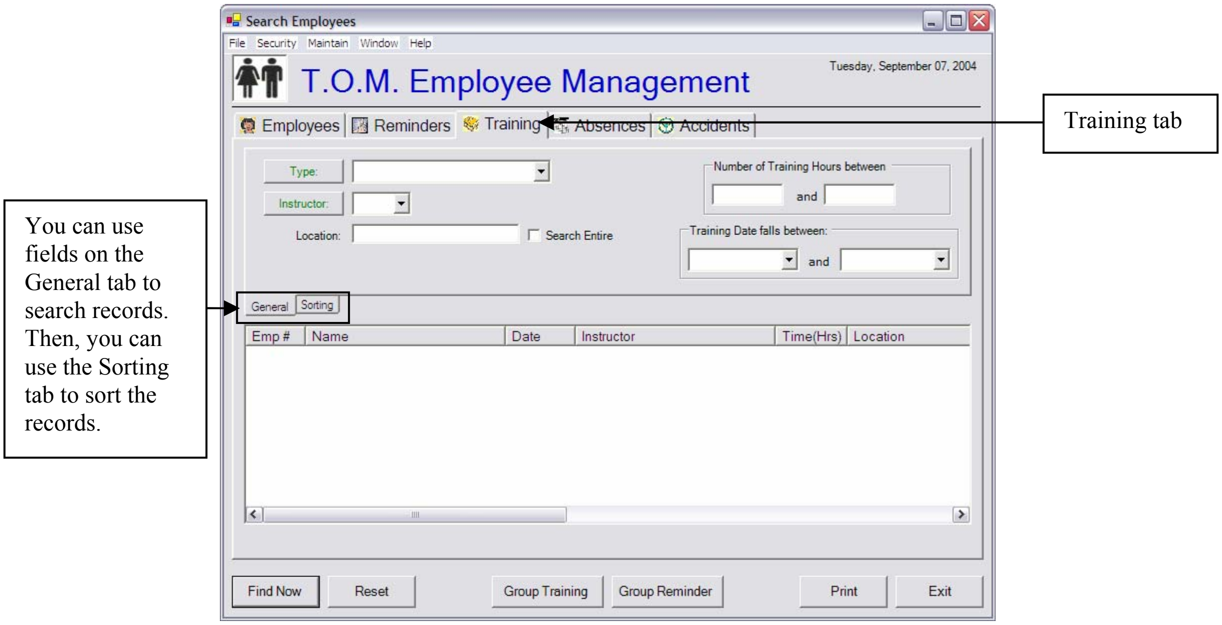


Figure 4-1. Training screen

Searching Training Records

To search your employee training records perform the following steps:

1. Click the Training tab. The Employee Management system displays the Training tab (Figure 4-2).

2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

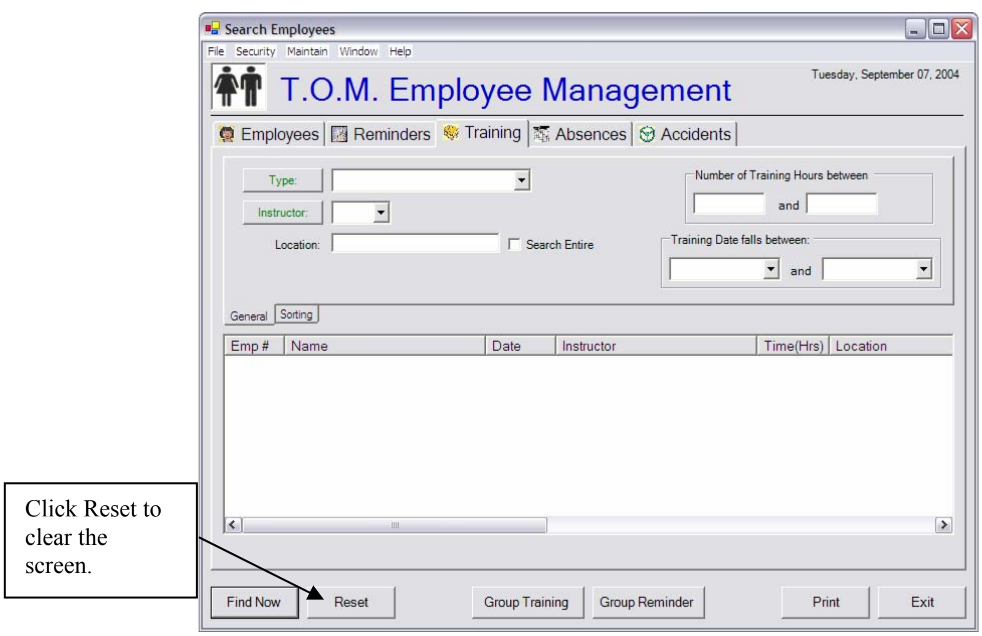


Figure 4-2. Training screen

3. Select or type the criteria you want to use in your search, or leave all the fields blank if you want to view all employees who have completed training. For information about the fields on the subtabs, see the General Subtab and Sorting Subtab sections below.

ⓘ ***T.O.M Tip***

Do I have to complete the entire screen?

No. You do not need to complete all the fields on the Training tab to search training records. In fact, if you want to view all employees who have completed training, you can leave all the fields blank and then click the Find Now button.

I completed the screen, but nothing happened. What's wrong?

If this happens, click Reset. This clears any other criteria you might have selected on other screens. Then, select your training criteria again, and click Find Now.

Where do the training codes come from?

You can add, edit, and delete training codes by selecting File>Training Codes.

4. Click the Find Now button to retrieve all the training records in the database that match your selected criteria.

   Figure 4-3 shows the results of a search using instructor code and location as the search criteria:

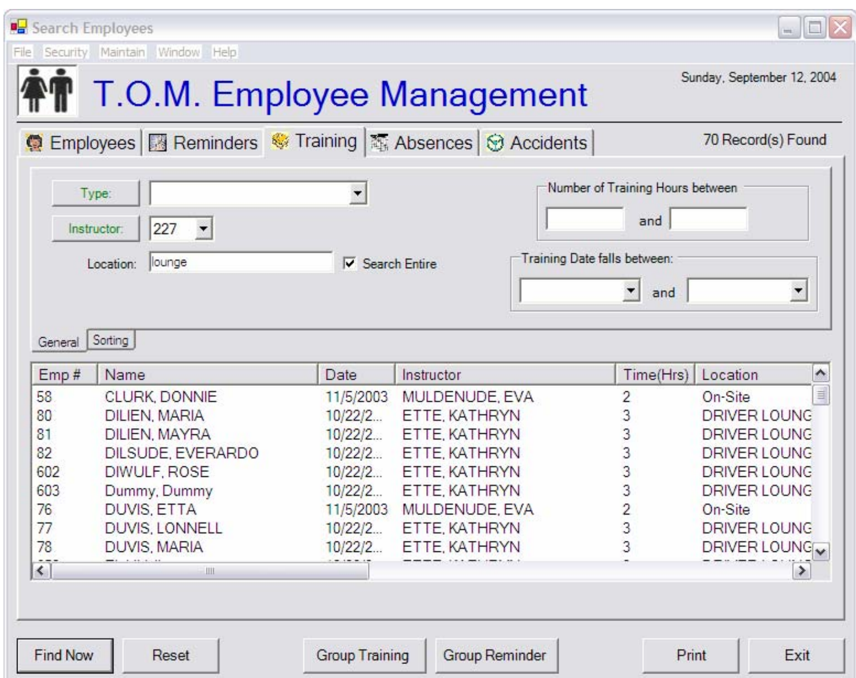
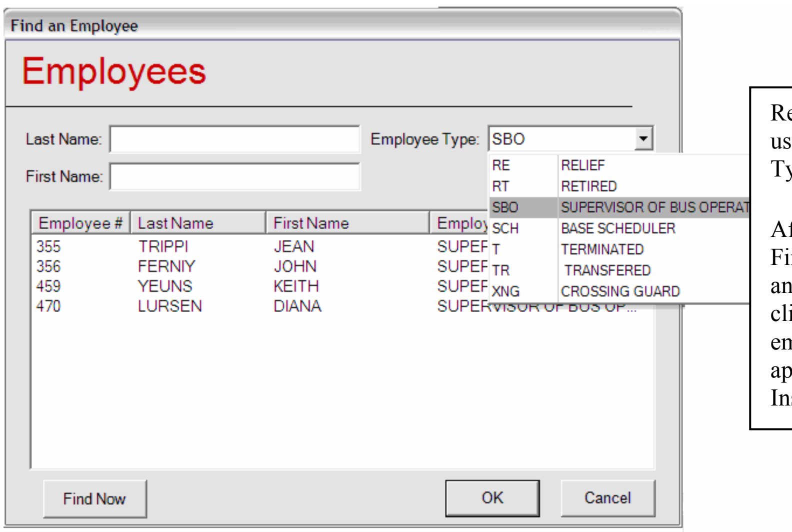


Figure 4-3. Results of a sample training search using the instructor and location criteria

General Subtab

You can use the following criteria on the General subtab (see *Figure 4-1*) to search training records:

- **Type.** Allows you to search employee records using the various training type codes you can set up.
- **Instructor.** Allows you to search for records matching an instructor's identification number. You can also click the Instructor button to search for an instructor alphabetically—when you click on the instructor's name and click OK (see Figure 4-4), the Employee Management system displays the employee's identification number in this field:



Results of a search using Employee Type.

After you click Find Now, select an employee and click OK, their employee number appears in the Instructor field.

Figure 4-4. Selecting an instructor

- **Location.** Allows you to search using the location where the training occurred.
- **Search Entire.** Allows you to search for any locations having characters you typed into Location. For example, suppose you use Staff Lounge as one of your locations. If you type in *lounge* and then click the Find Now button without checking the Search Entire checkbox, the Employee Management system will not return any records unless your database contains a location whose entire name is Lounge. If, however, you check the Select Entire checkbox, the Employee Management system retrieves all locations having the word *Lounge* in them, meaning it would retrieve records with locations such as *Staff Lounge* as well as *Driver Lounge*.
- **Number of Training Hours between.** Allows you to search records using a range of training hours. For example, you could search for all records having training records between 10 and 15 hours. The other option you have is to search for records having a specific number of training hours. For example, if you want to search for records having 10 hours of training time, type 10 into both fields.
- **Training Date falls between.** Allows you to search for training records with training that occurred within a particular time period. For example, you could search for all training occurring between September 1, 2004, and September 28, 2004. You can also search for all training that occurred on a specific date by only adding the date to the first date field.
  - » You can access the calendar by clicking on the pull-down arrows on this tab. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date. If you do not select the day, the Employee Management system uses the first day of the month as the default value.

» You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.

Sorting Subtab

To make the training search results more useful to view, print, or generate reports from, the Employee Management software allows you to change the sort order of the search results. You can select up to three of these options as your sort criteria. Also, after you select a sort option, you can select ascending or descending as the sort order for each field.

ⓘ ***T.O.M Tip***	**At what point can I sort training records? Also, what if I pick the wrong sorting options or the results aren't what I expected?** You can sort training records at any point. When you sort training records, you are sorting displayed records. Also, if the results are not what you expected after you click the Find Now button, you can start over by clicking the Reset button to clear your selections and the training records. Then, click Find Now to refresh the screen. However, if you have filtered the records and click Reset and then Find Now, your records are no longer filtered, meaning that the records displayed are the same as those that displayed when you last started the system.

Combining Training Search Options with General Employee Search Options

You can combine training search options with search options that are available on the Employees tab. For example, you can search for all employees who are drivers and who took training in the driver lounge.

1. Click the Employees tab.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

3. Select the employee search criteria. Figure 4-5 shows Driver being selected as the Employee Type on the Employees tab.

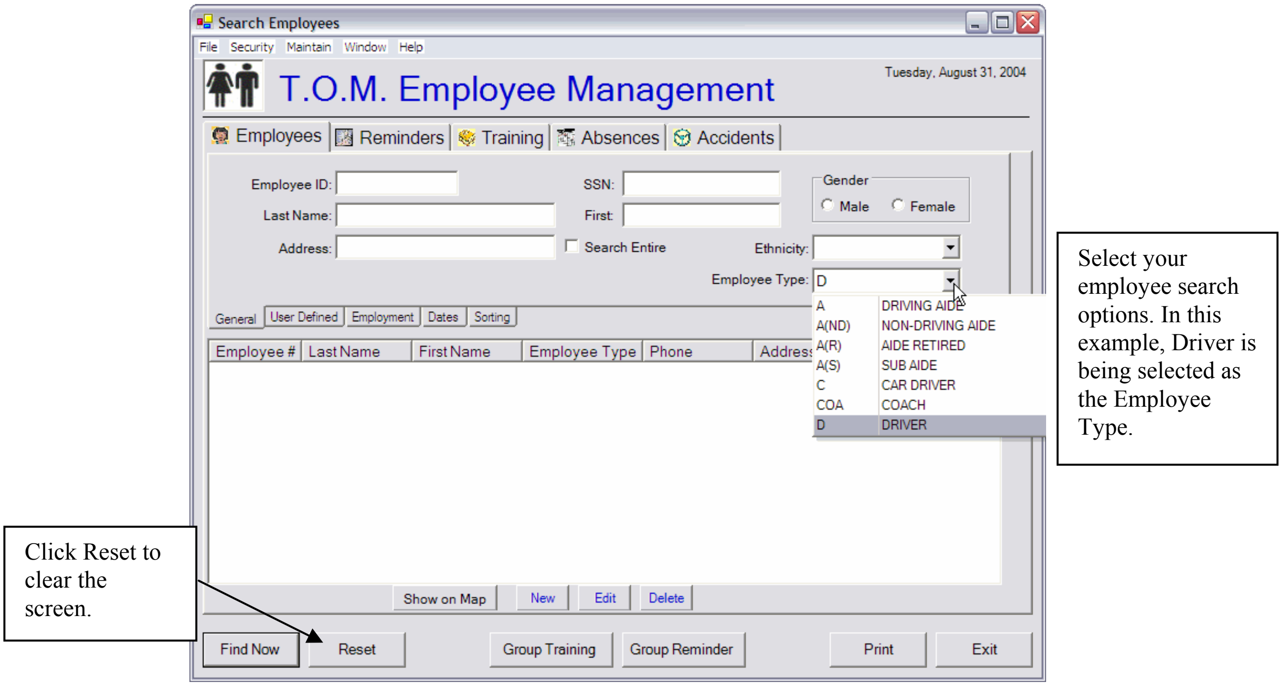


Figure 4-5. Selecting Driver as the Employee Type

4. Click the Training tab. The Employee Management system displays the Training screen.

5. Select the training criteria you want to include in the search. Figure 4-6 shows searching for training that occurred in the Driver Lounge:

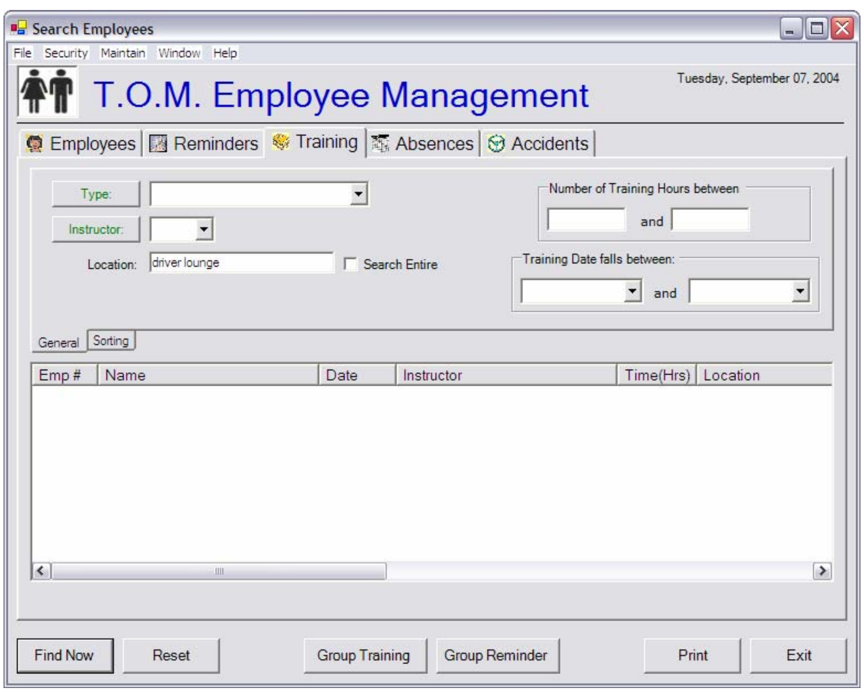


Figure 4-6. Searching for training that occurred in the driver lounge

6. Click the Find Now button to retrieve all the employee records in the database that match the training search criteria *and* that belong to employees who match the Employee search criteria.

   Figure 4-7 shows the result of a search of employees who are drivers AND completed training in the Driver Lounge:

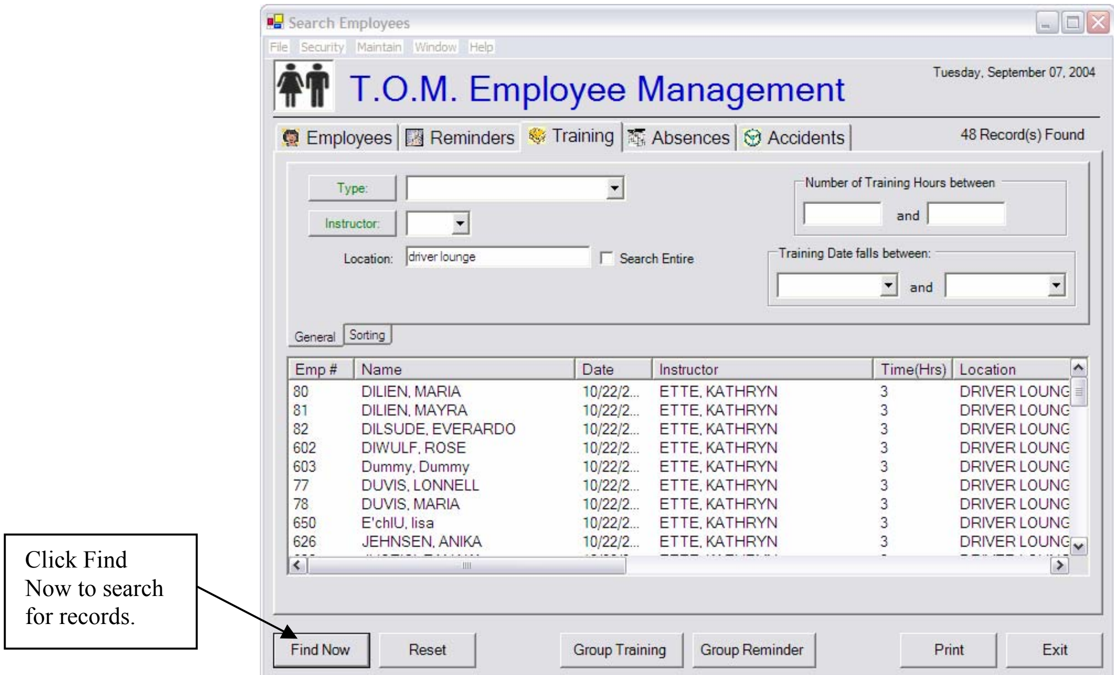


Figure 4-7. Results of a search of drivers who completed training in the Driver Lounge

Viewing Training Records for an Individual Employee

1. Click the Employees tab.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

3. Select the search criteria.

4. Click the Find Now button to retrieve all the training records in the database that match your selected criteria.

   Figure 4-8 shows using Smith as the search criteria:

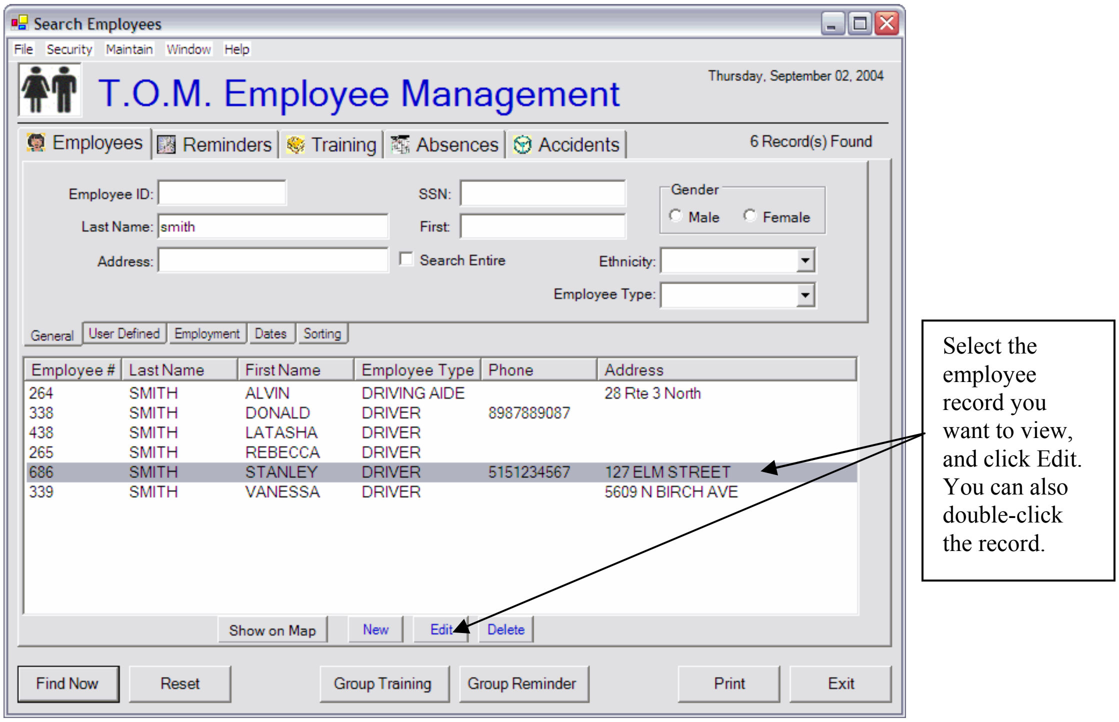


Figure 4-8. Search results of Smith

5. To display the Employee screen:

   - Double-click the employee's record.

   OR

   - Select the employee record, and click Edit.

6. Click the Training tab. The Employee Management system displays the employee's training (Figure 4-9).

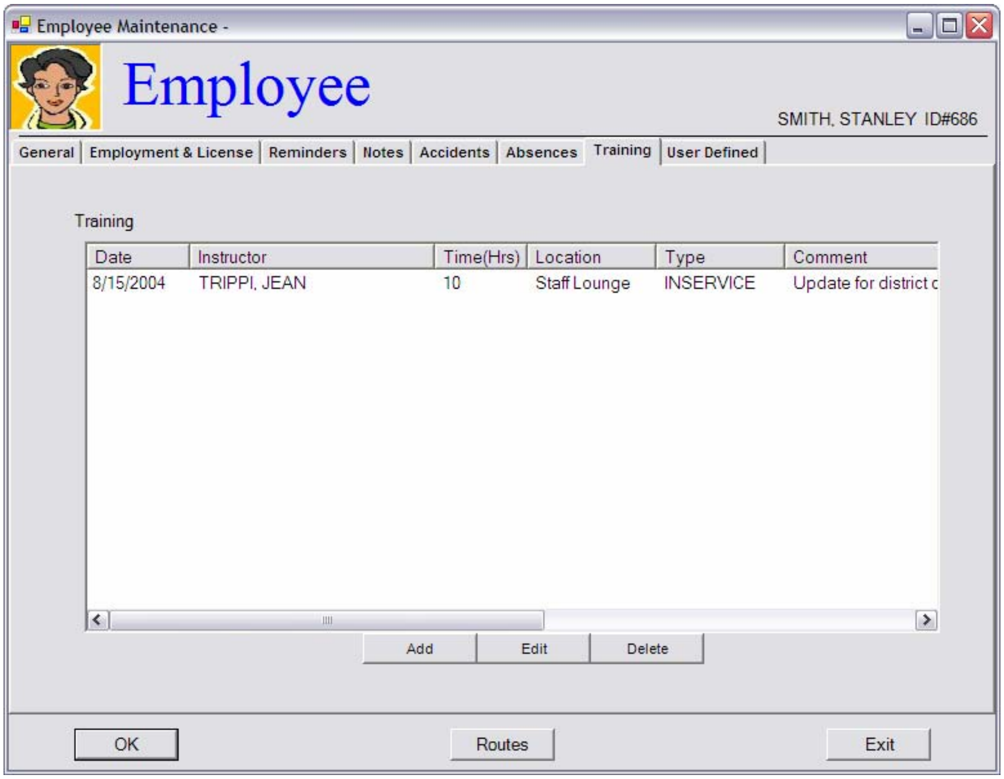


Figure 4-9. Viewing training records for an individual employee

Adding Training Records for Individual Employees

You can add training to individual employee's records. However, if you need to add the same training to many employees, you will find it more efficient to add the training to a group of employees rather than adding the same information to employee records one at a time. For information about adding training to a group of employees, see the Adding Training for a Group of Employees section later in this chapter.

This section is divided into two parts:

- **Adding Training to an Individual Employee.** Explains the steps for adding training to the system.
- **Employee Training Screen.** Explains all the fields on the Employee Training screen as well as specific procedures such as selecting the instructor, searching training types, looking up training codes, and applying training to open reminders.

Adding Training to an Individual Employee

1. Click the Add button on the Training screen (Figure 4-10).

Click the Add button to add a training record.

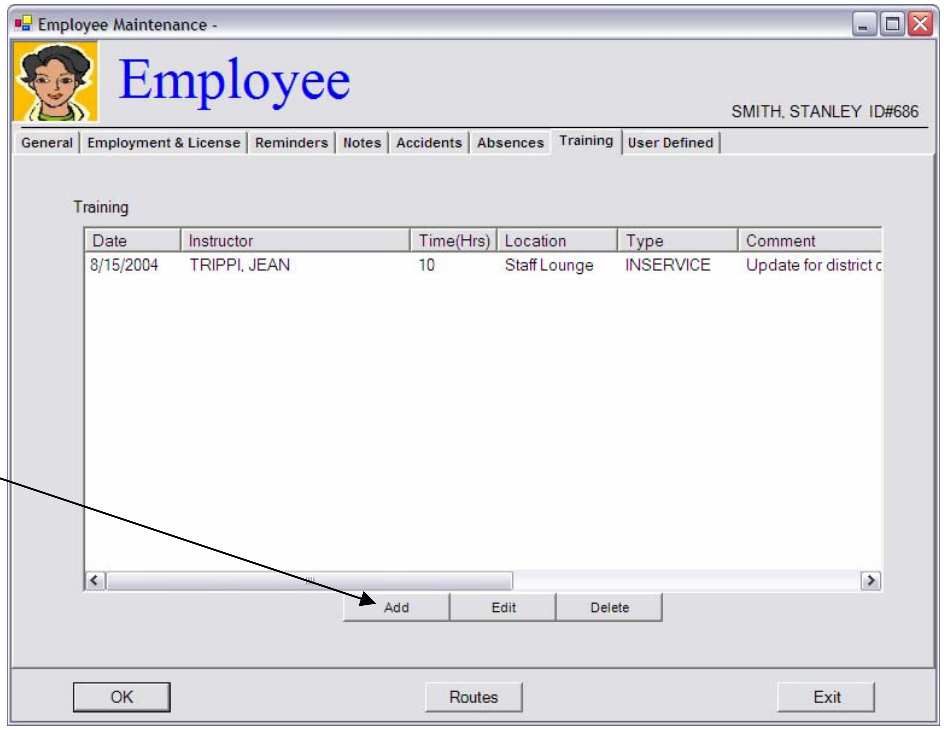


Figure 4-10. Adding a training record

The Employee Management system displays the Employee Training screen.

2. Select or type in the information you want to save with the training record. You are required to select training Date and Instructor. For a detailed description of all the fields on this screen, see the Employee Training Screen section later in this chapter for more information about this screen.

   After you complete the fields, the screen will look similar to:

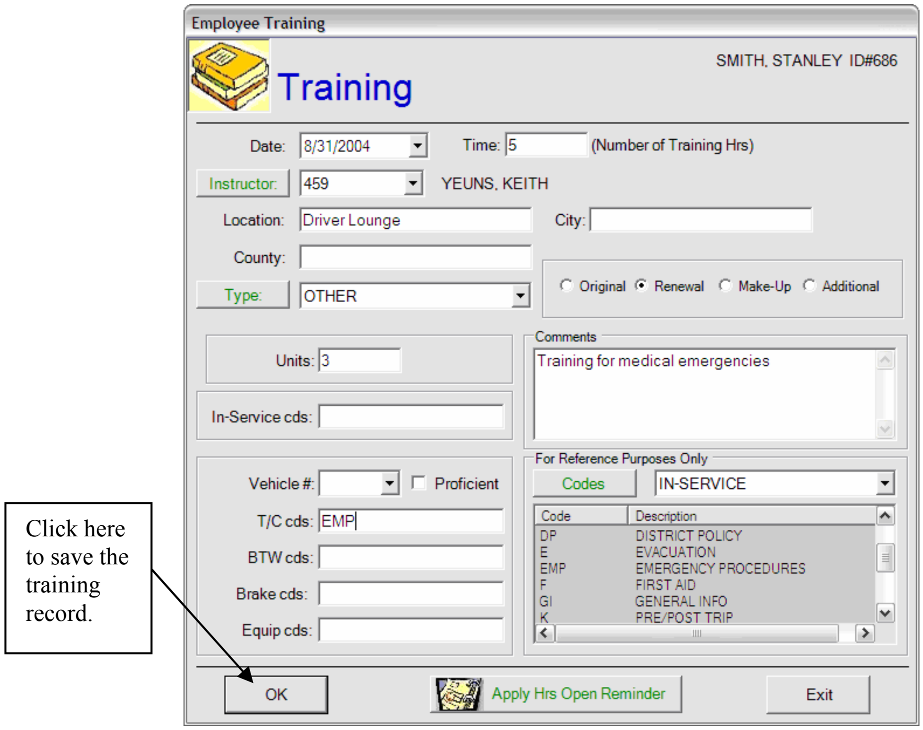


Figure 4-11. Completing the Employee Training screen

3. Click the OK button to save the training record and close the screen.

   The Employment Management system updates the database and displays the new record:

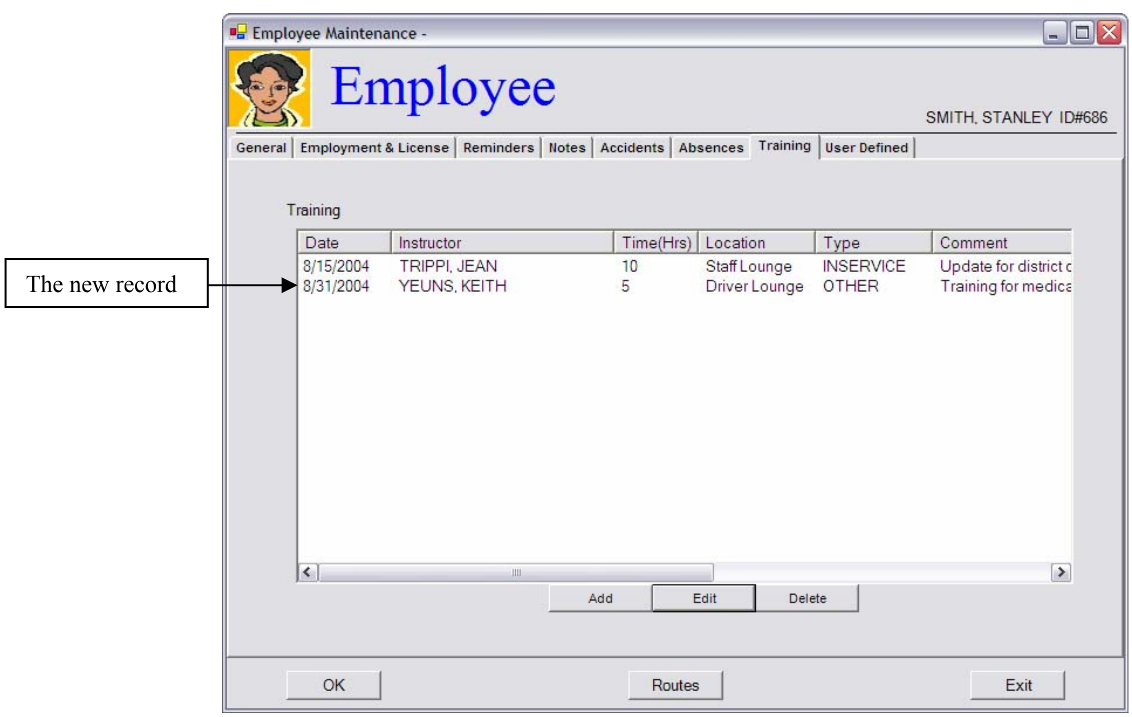


Figure 4-12. Sample of added training record

Employee Training Screen

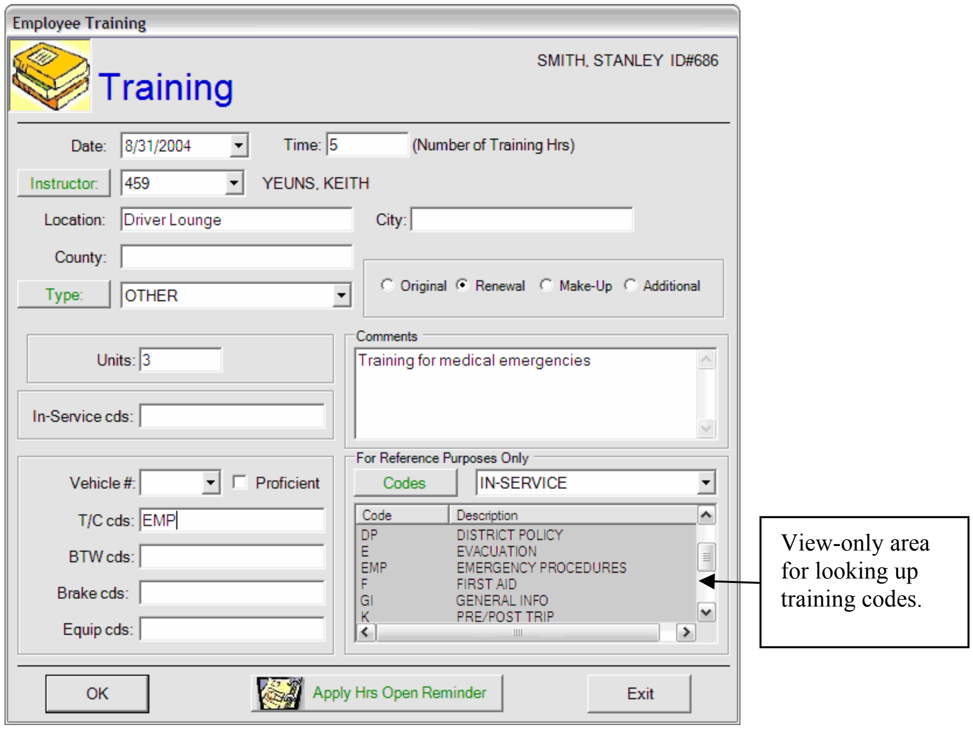


Figure 4-13. Training screen fields

You can add the following training information to the system:

- **Date.** Allows you to select or type in the date the training occurred.
  - » You can access the calendar by clicking on the pull-down arrow. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date. If you do not select the day, the Employee Management system uses the first day of the month as the default value.
  - » You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.
- **Time.** Allows you to enter the number of training hours to be credited to the employee.
- **Instructor.** Allows you to select the training instructor. For information about completing this field, see the Searching for an Instructor section later in this chapter.
- **Location.** Allows you to enter the location where the training occurred. You can type up to 100 alphanumeric characters into this field, meaning you can type letters and numbers.
- **City.** Allows you to enter the city where the training occurred. You can enter up to 20 letters into this field.
- **County.** Allows you to enter the county where the training occurred. You can enter up to 50 letters into this field.
- **Type.** Allows you to select the type of training the employee completed. For information about completing this field, see the Searching the Training Types section later in this chapter. In addition to this, you can select whether the training course was:

   » **Original** (Default value)
   » **Renewal**
   » **Make Up**
   » **Additional**

- **Units.** Allows you to enter the number of training units the employee should receive for this training course. You can enter up to 30 alphanumeric characters into this field.
- **Comments.** Allows you to add additional training information. You can type any number of characters into this field.
- **In Service Cds.** *(In-Service Codes)* Allows you to enter the code for in-service training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
- **Vehicle #.** Allows you to select the vehicle number of the vehicle assigned to the employee.
- **Proficient.** Allows you to select whether the employee was considered to be proficient after the training.
- **Various Training Codes.** Allows you to type multiple training codes into T/C, BTW, Brake, and Equip. You can click the Codes button to look up what codes you want to type into these fields. However, the Employee Management system does *not* check your entries in these fields to ensure they are valid entries. If you type more than one code into one of these fields, you might find it easier to read your entries if you separate them with commas.
   » **T/C Cds.** (Terrain/Condition Codes) Allows you to enter the code(s) for terrain/condition training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
   » **BTW Cds.** (Behind the Wheel Codes) Allows you to enter the code(s) for behind the wheel training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
   » **Brake Cds.** (Brake Codes) Allows you to enter the code(s) for brake training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
   » **Equip Cds.** (Equipment Codes) Allows you to enter the code(s) for equipment training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
- **Codes.** Allows you to look up training codes. When you select a training category, you can view the training codes in the Codes box. This area of the screen is view-only. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.

Searching for an Instructor

The procedure below shows you how to search for an instructor employee by clicking the Instructor button. You can also choose an instructor employee by clicking the pull-down arrow and selecting the employee from the drop-down list. However, if you have many employees in your district, you might find that it is faster to click the Instructor button and use the procedure below to select the instructor employee rather than scrolling through the drop-down list.

1. Click the Instructor button.

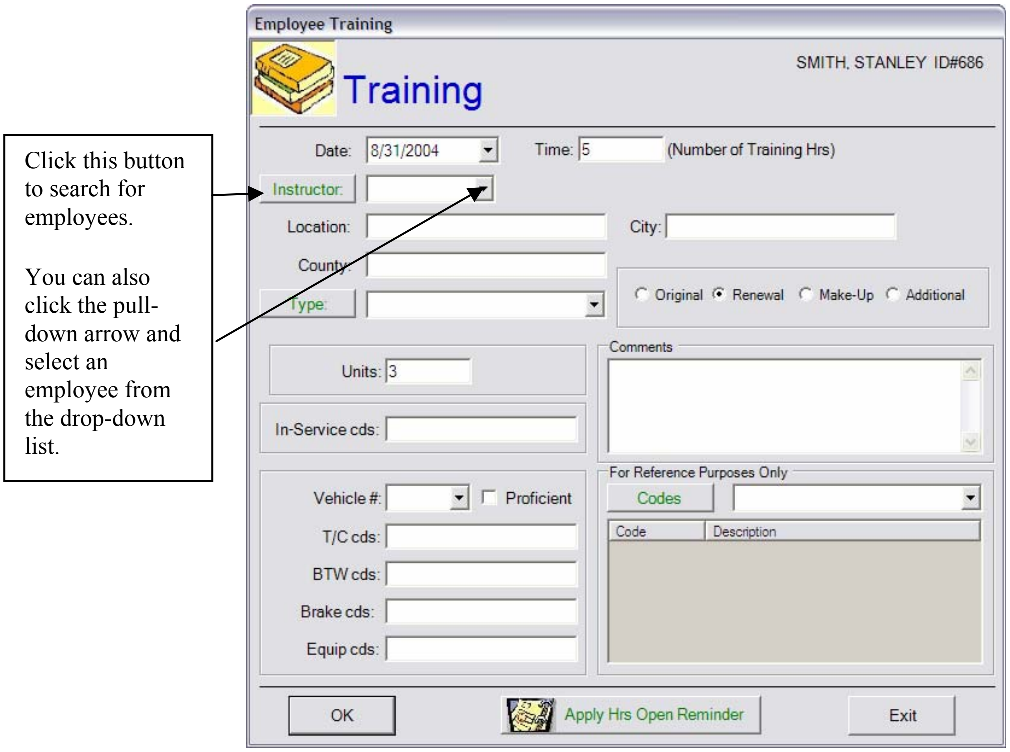


Figure 4-14. Searching for instructors

The Employee Management system displays the Find an Employer screen.

2. Type in the criteria you want to use to search for the employee.

Figure 4-15 shows the results of using the Employee Type as the search criteria:

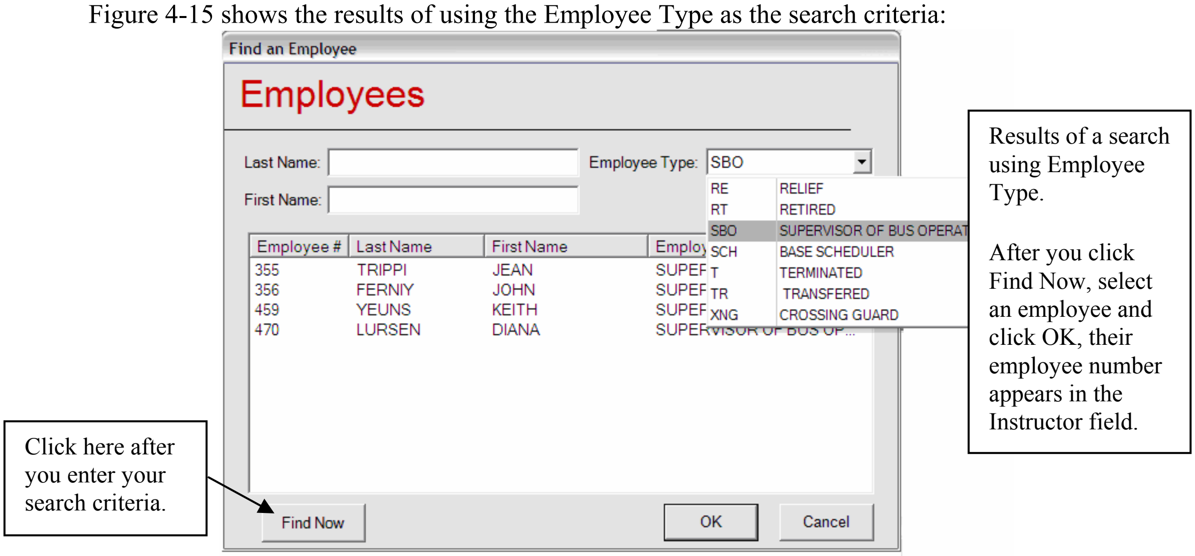


Figure 4-15. Selecting an instructor

3. Click the Find Now button to search for employees matching your search criteria.

4. Select the employee, and click the OK button. The Employee Management system closes the screen and displays the selected employee's identification number in the Instructor field:

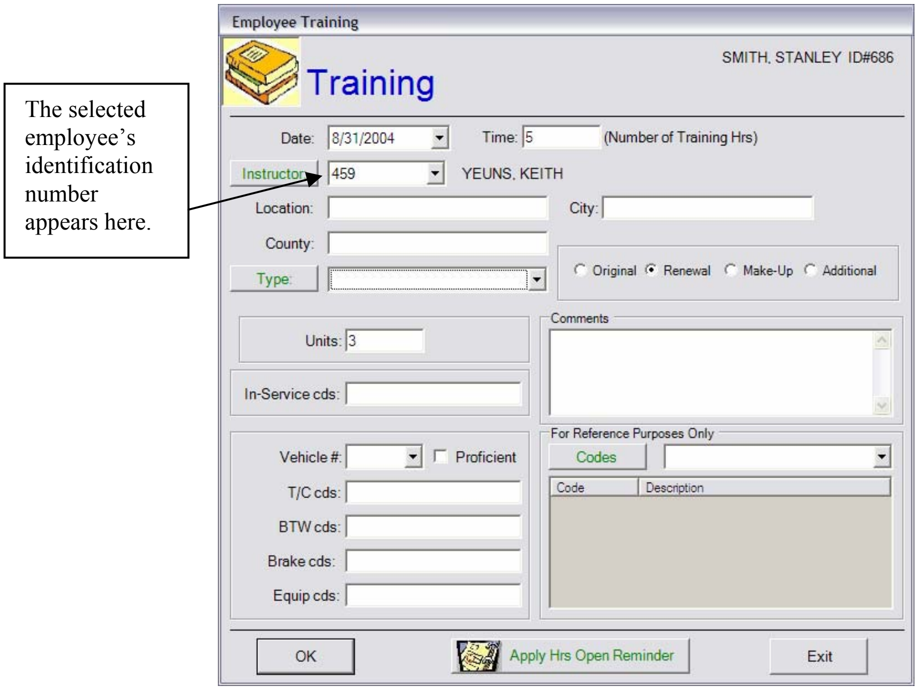


Figure 4-16. Adding the instructor to the training record

Searching the Training Types

The procedure below shows you how to search for a training type, or category, by clicking the Type button. You can also choose a training type by clicking the pull-down arrow and selecting the type from the drop-down list. However, if you have many training types in your database, you might find that it is faster to click the Type button and use the procedure below to select the training type rather than scrolling through the drop-down list.

1. Click the Type button.

Click this button to search for training types.

You can also click the pull-down arrow and select a training type from the drop-down list.

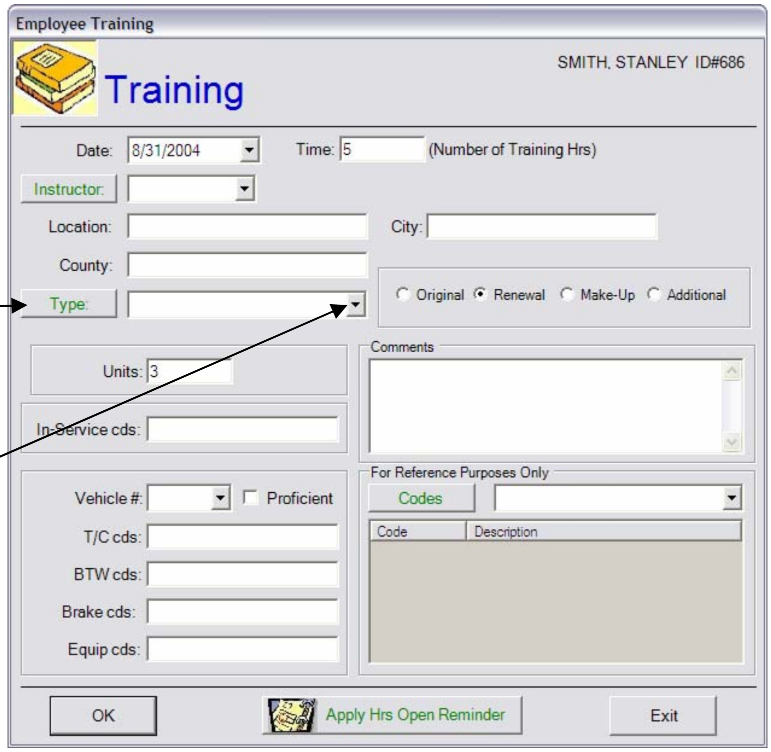
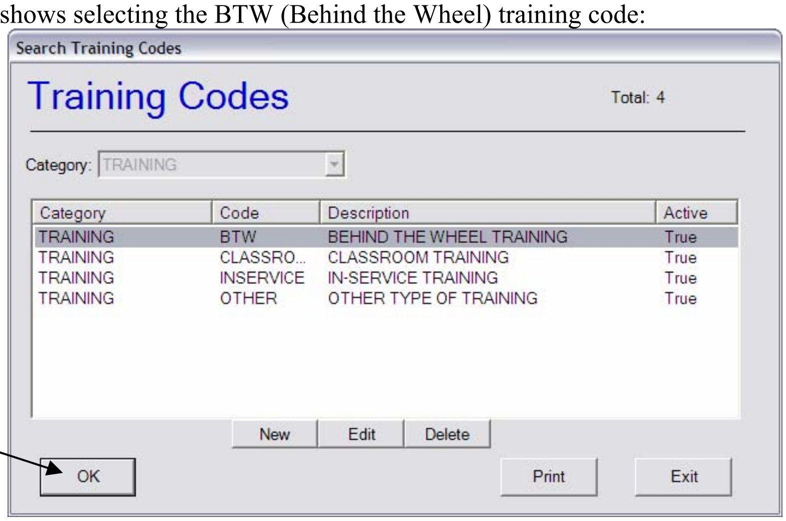


Figure 4-17. Searching for training types

The Employee Management system displays the Search Training Codes screen.

2. Select the training code.

Figure 4-15 shows selecting the BTW (Behind the Wheel) training code:



Click here after you select the training code.

Figure 4-18. Selecting an instructor

3. Select the training code, and click the OK button. The Employee Management system closes the screen and displays the selected training code in the Type field:

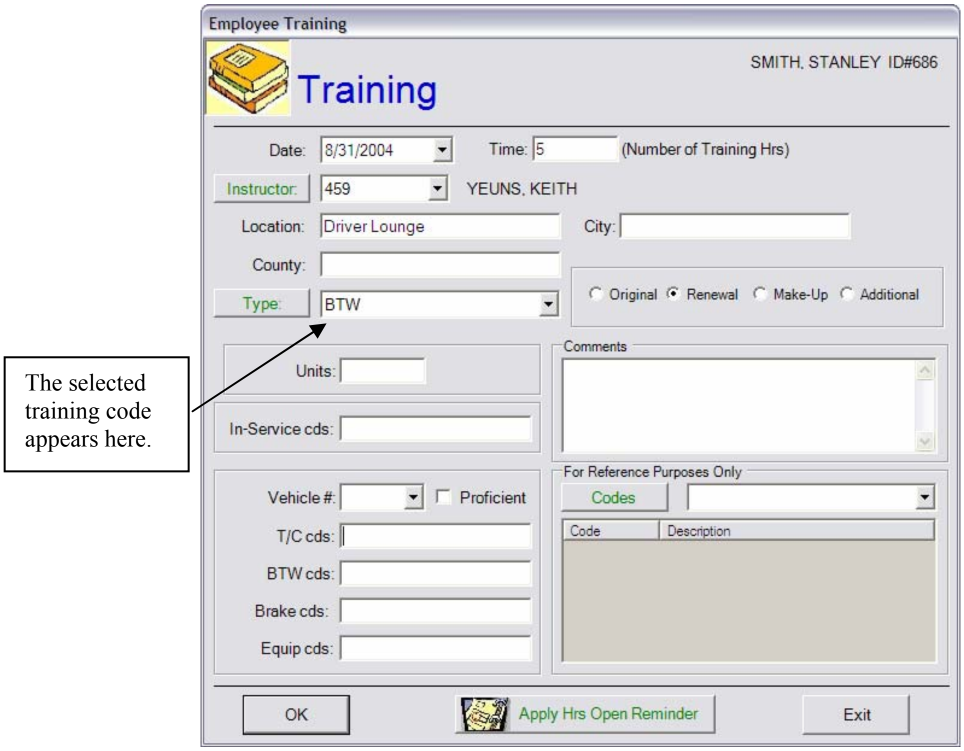


Figure 4-19. Adding the training type to the training record

Looking Up Training Codes

The T.O.M. Employee Management Software allows you to specify multiple training codes that apply to the various subjects that were covered in the class. Since a class may cover more than one subject the T.O.M. Employee Management Software allows you to specify more than one code and to organize those codes into four sections:

- T/C (Terrain/Condition) Codes
- BTW (Behind The Wheel) Codes
- Brake Codes
- Equipment Codes

Since most of these codes are either abbreviated numbers or letters, you may find it hard to remember what the various codes are. To help you, the Employee Management software gives you an easy and powerful Code Lookup feature.

The procedure below shows you how to look up a training code by clicking the Codes button. You can also look up a training code by clicking the pull-down arrow and selecting the code from the drop-down list. However, if you have many training codes in your database, you might find that it is faster to click the Codes button and use the procedure below to look up the training code rather than scrolling through the drop-down list. Lastly, if you know the training code, you can type it into the appropriate code box.

To look up and add the training code:

1. Click the Codes button.

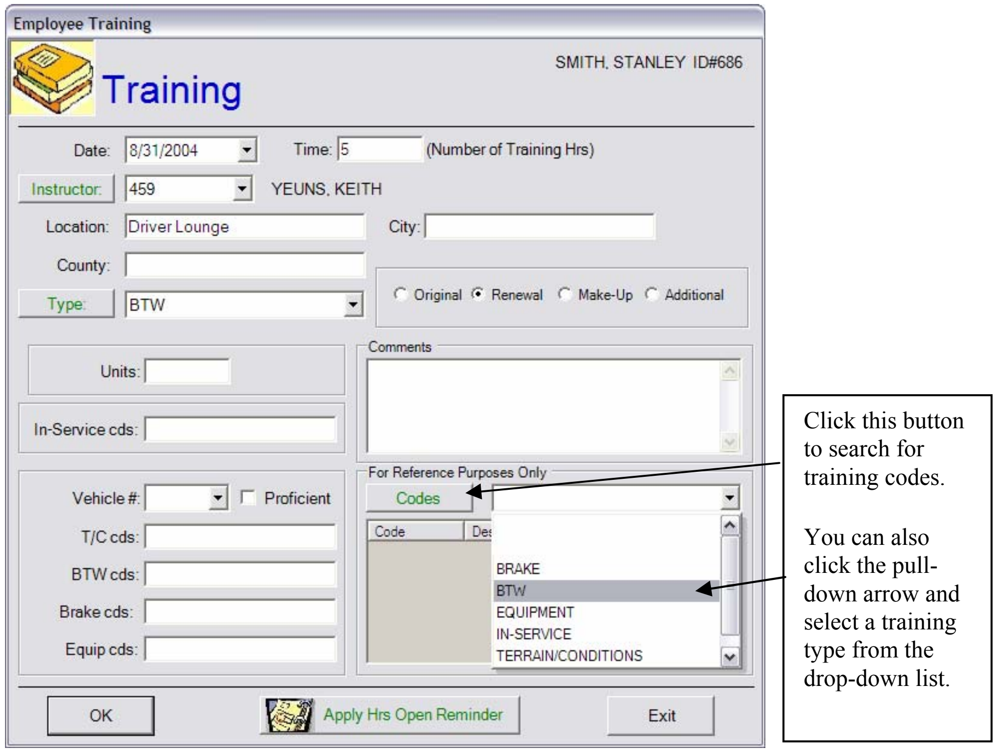


Figure 4-20. Searching for training codes

The Employee Management system displays the Search Training Codes screen.

2. Select the training category by clicking the pull-down arrow.

   Figure 4-15 shows selecting the BTW (Behind the Wheel) training code:

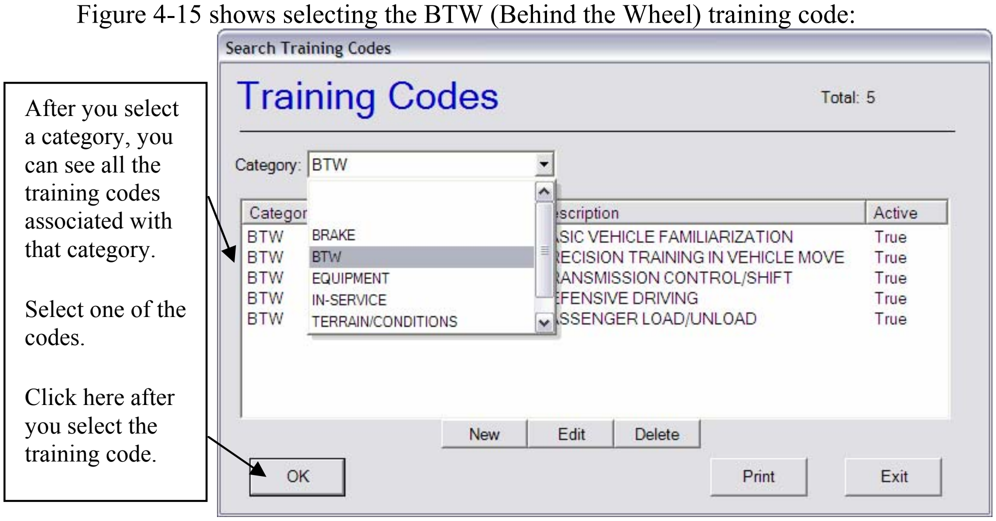


Figure 4-21. Selecting a training category

3. Select a code, and click the OK button. The Employee Management system closes the screen and displays the codes associated with the selected training category.

4. Type the training code into the appropriate box.

   Figure 4-22 shows the codes associated with the BTW training type as well as the training code typed into the appropriate box. In this case, the training code was 4, Defensive Driving.

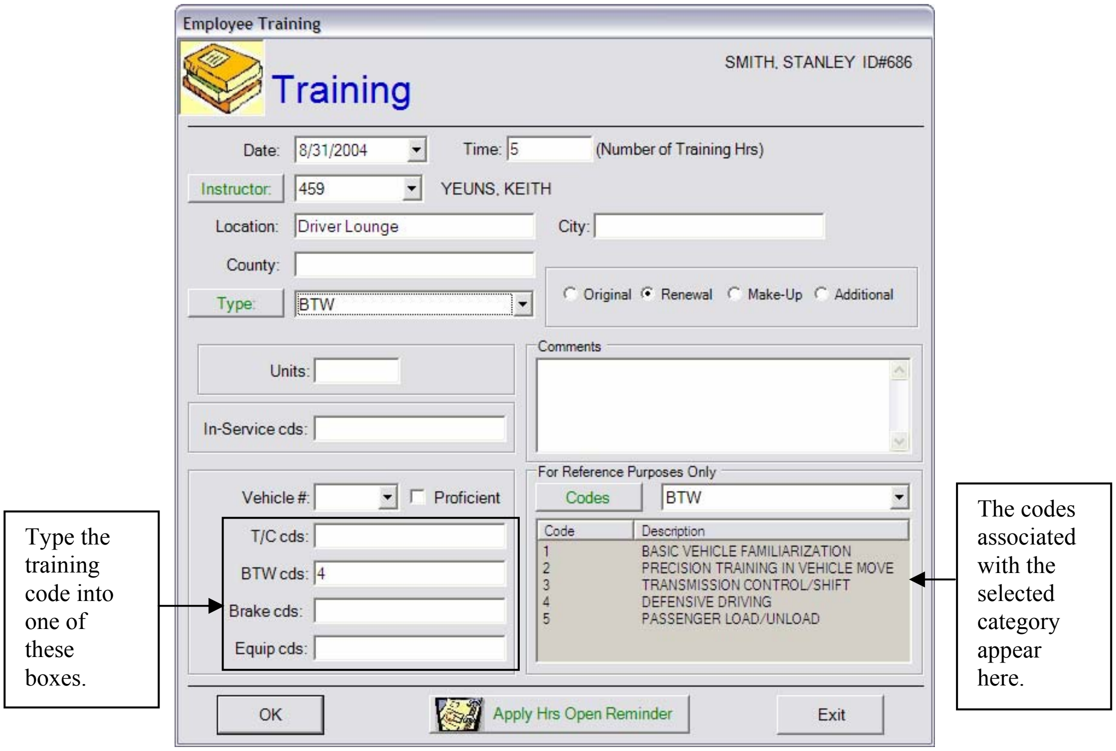


Figure 4-22. Adding the training code to the training record

Applying Training Hours Against Individual Employee Training Reminders

The Employee Management system can track the number of hours employees must complete for a certain type of training as well as the number of hours completed. To track the number of hours required for an employee for a certain category of training, you must create a training reminder in the Employee Management system.

When you add training hours to the system for an individual employee or a group of employees, you can apply completed hours to the training reminder. For example, suppose an employee must complete 20 in-service hours and that he just completed five of those hours with a training class he just completed.

When you add the training record to the system, you can specify that those five hours be applied to the reminder. The Employee Management system deducts the completed hours, so the reminder now shows that the employee now has 15 hours to complete.

Where can I learn more about reminders?

Refer to Chapter 2 for more information about setting up reminders for individual employees as well as group reminders.

ⓘ ***T.O.M Tip***

To apply training hours against employee reminders:

1. Complete the training screen.

2. Click the Apply Hrs Open Reminder button (Figure 4-23).

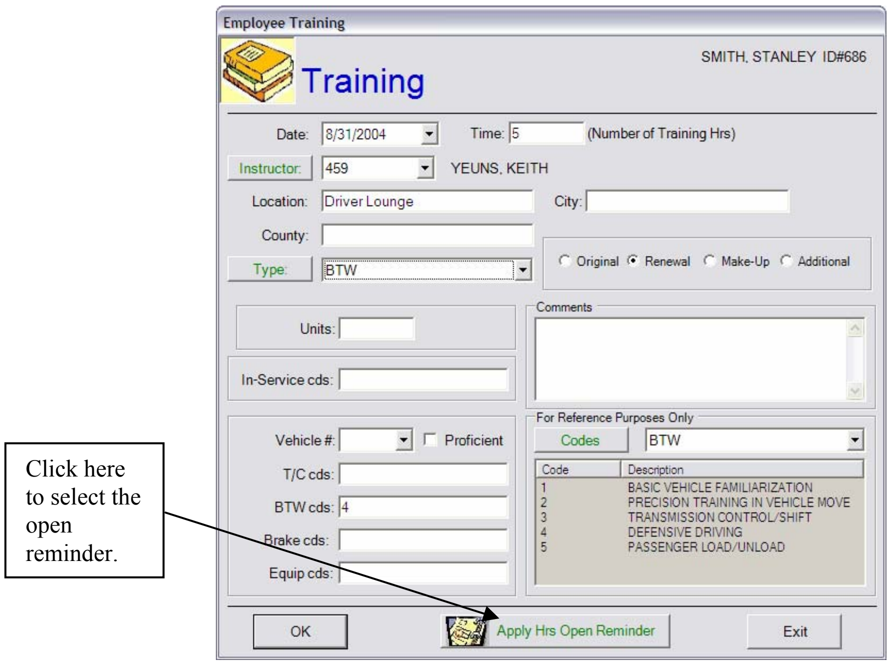


Figure 4-23. Applying training hours to an open reminder

The Employee Management system displays the Select Reminder and Apply Training Hours screen showing all open reminder records for this specific employee (Figure 4-24).

3. Select the open reminder you want to apply the training hours to.

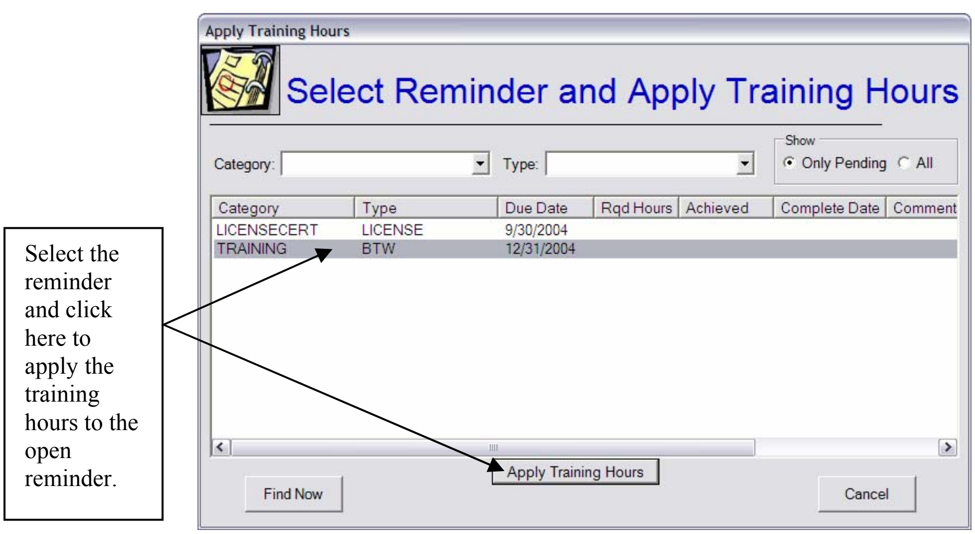


Figure 4-24. Selecting an open reminder and apply training hours to it

4.. Click the Apply Training Hours button. The Employee Management system applies the hours to the open reminder and updates the Training screen (Figure 4-25:

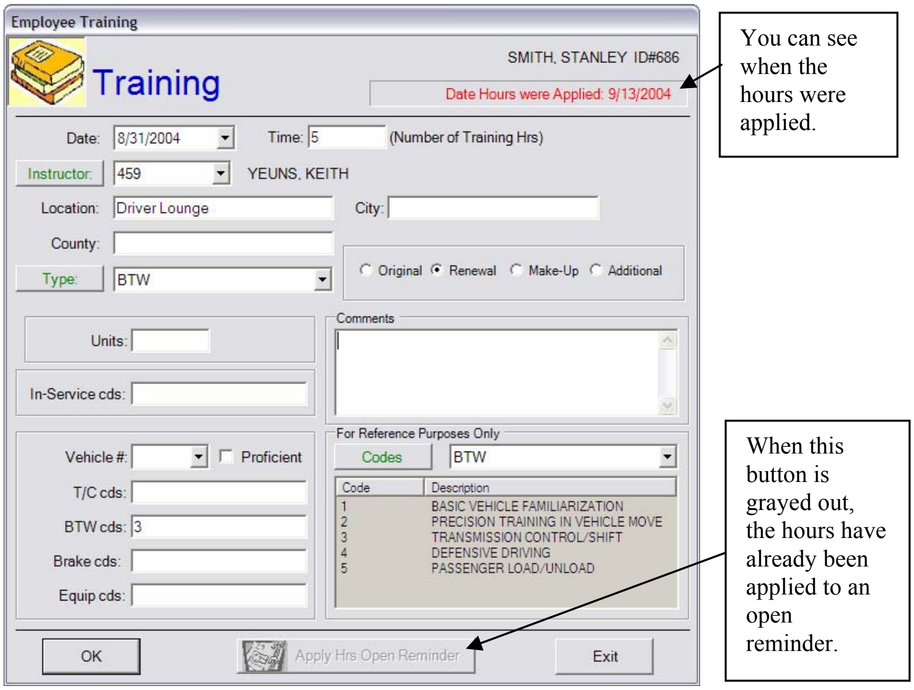


Figure 4-25. Training screen after applying hours to open reminder

Adding Training for a Group of Employees

Although you can set up training records for individual employees, it is far more efficient to set up training records for an entire group of employees. This not only saves time, but it reduces input errors that might occur from entering so many separate records.

This section is divided into two parts:

- **Adding Training for a Group of Employees.** Explains how to add group training to a group of employees.
- **Log Training for a Group Screen.** Explains all the fields on the Group Training screen as well as specific procedures such as selecting the instructor, searching training types, looking up training codes, and applying training to open reminders.

Adding Training to a Group of Employees

1. Click the Employees tab.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

3. Select employee search criteria.

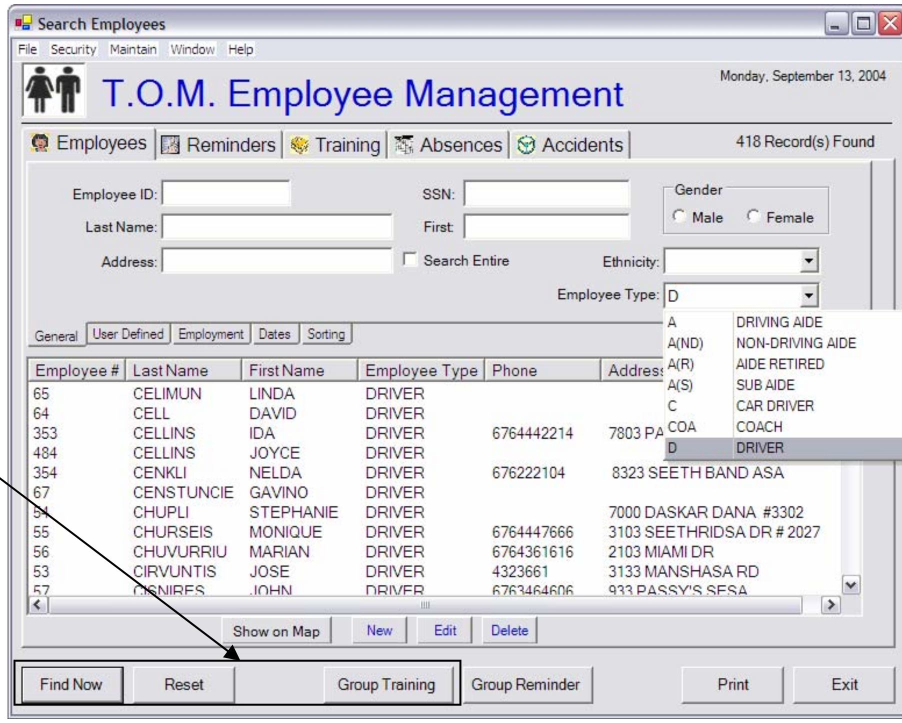
4. Click the Find Now button to retrieve all employee records matching the search criteria.

   Figure 4-26 shows Driver being selected as the Employee Type on the Employees tab.

Click Reset to clear the screen.

Click Find Now to search employee records.

Click Group Training to add training to a group of employees.



Select your employee search options. In this example, Driver is being selected as the Employee Type.

After clicking Find Now, records matching the search criteria are displayed.

Figure 4-26. Selecting Driver as the Employee Type

5. Click the Group Training button. The Employee Management system displays the Log Training for a Group screen (Figure 4-27).

6. Select or type in the information you want to save with the training record. You are required to select training Date and Instructor. For a detailed description of all the fields on this screen, see the Log Training for a Group Screen section later in this chapter.

7. The T.O.M. Employee Management Software automatically fills the Available Employees list with the search results in the Employees Search screen. From this list you may further refine which employees are to receive credit for the Training class by individually adding them to the Selected Employees list or you may simply choose to add all the employees found in the Employee Search to the Selected Employees list.

   To add the employees to the group:

   - Select an employee, and click the Add button. The Employee Management system adds the selected employee to the group. His name now appears in the Selected Employees box.
   - Click the Add All button. The Employee Management system adds all the listed employees to the group. Their names now appear in the Selected Employees box.

NOTE: The Employee Management system will automatically fill the Available Employees list with the search results in the Employees Search screen. From this list, you may further refine which employees are to receive credit for the Training class by individually adding them to the Selected Employees list or you may simply choose to add all the employees found in the Employee Search to the Selected Employees list.

8. To remove employees from the group:

- Select an employee, and click the Remove button. The Employee Management system removes the selected employee from the group. His name now appears in the Available Employees box.
- Click the Remove All button. The Employee Management system removes all the listed employees from the group. Their names now appear in the Available Employees box.
- Click Reset List to start over.

After you complete the fields, the screen will look similar to:

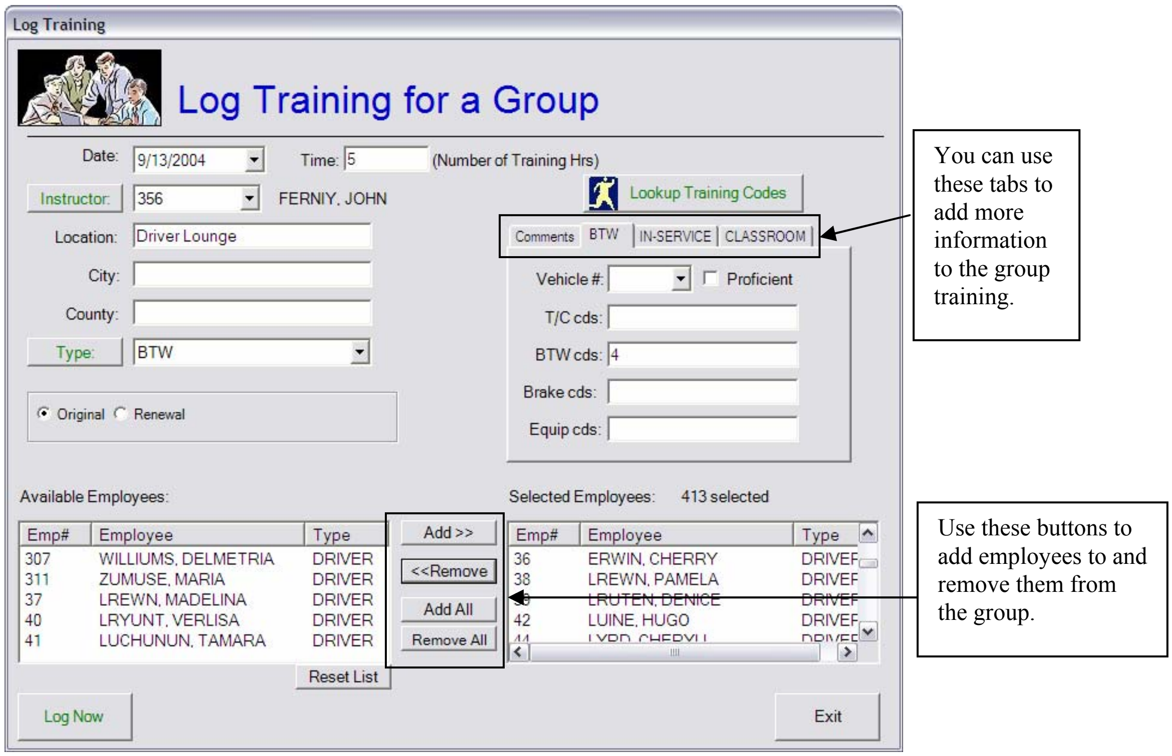


Figure 4-27. Results of adding training to a group of employees

Log Training for a Group Screen

You can add the following training information to the system (see Figure 4-27):

- **Date.** Allows you to select or type in the date the training occurred.
  - » You can access the calendar by clicking on the pull-down arrow. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date. If you do not select the day, the Employee Management system uses the first day of the month as the default value.
  - » You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.
- **Time.** Allows you to enter the number of training hours to be credited to the group of employees.
- **Instructor.** Allows you to select the training instructor. For information about completing this field, see the Searching for an Instructor section.

- **Location.** Allows you to enter the location where the training occurred. You can type up to 100 alphanumeric characters into this field, meaning you can type letters and numbers.
- **City.** Allows you to enter the city where the training occurred. You can enter up to 20 letters into this field.
- **County.** Allows you to enter the county where the training occurred. You can enter up to 50 letters into this field.
- **Type.** Allows you to select the type of training the employee completed. For information about completing this field, see the Searching the Training Types section. In addition to this, you can select whether the training course was:
  - » **Original** (Default value)
  - » **Renewal**
- **Look Up Training Codes.** Allows you to look up training codes to enter into T/C, BTW, Brake, and Equip. You can click the this button to look up what codes you want to type into these fields. However, the Employee Management system does *not* check your entries to ensure they are valid entries in these fields. If you type more than one code into one of these fields, you might find it easier to read your entries if you separate them with commas.
- **Comments subtab.** Allows you to add additional training information. You can type any number of characters into this field.

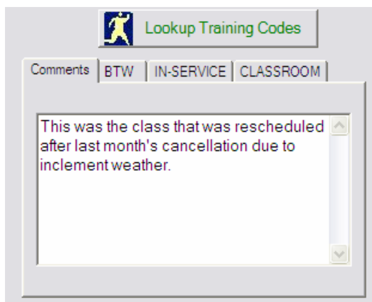


Figure 4-28. Comments subtab

- **BTW subtab.** (Behind the Wheel) Allows you to enter the following:

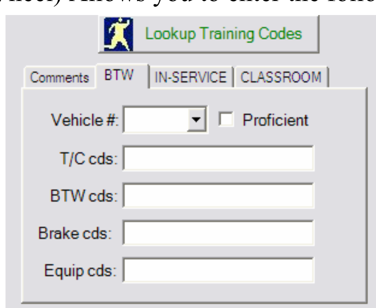


Figure 4-29. BTW subtab

  - » **Vehicle #.** Allows you to select the vehicle number of the vehicle assigned to the employee.
  - » **Proficient.** Allows you to select whether the employee was considered to be proficient after the training.
  - » **T/C Cds.** (Terrain/Condition Codes) Allows you to enter the code for terrain/condition training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.

» **BTW Cds.** (Behind the Wheel Codes) Allows you to enter the code for behind the wheel training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.

» **Brake Cds.** (Brake Codes) Allows you to enter the code for brake training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.

» **Equip Cds.** (Equipment Codes) Allows you to enter the code for equipment training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.

- **In-Service subtab.** Allows you to enter the following:

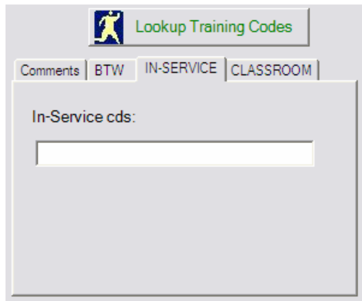


Figure 4-30. In-Service subtab

» **In Service Cds.** *(In-Service Codes)* Allows you to enter the code for in-service training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.

- **Classroom subtab.** Allows you to enter the following:

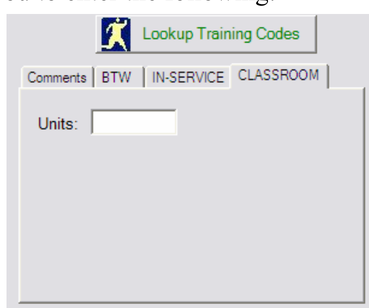


Figure 4-31. Classroom subtab

- **Units.** Allows you to enter the number of training units the employee should receive for this training course. You can enter up to 30 alphanumeric characters into this field.

Searching for an Instructor

The procedure below shows you how to search for an employee by clicking the Instructor button. You can also choose an employee by clicking the pull-down arrow and selecting the employee from the drop-down list. However, if you have many employees in your district, you might find that it is faster to click the Instructor button and use the procedure below to select the employee rather than scrolling through the drop-down list.

1. Click the Instructor button.

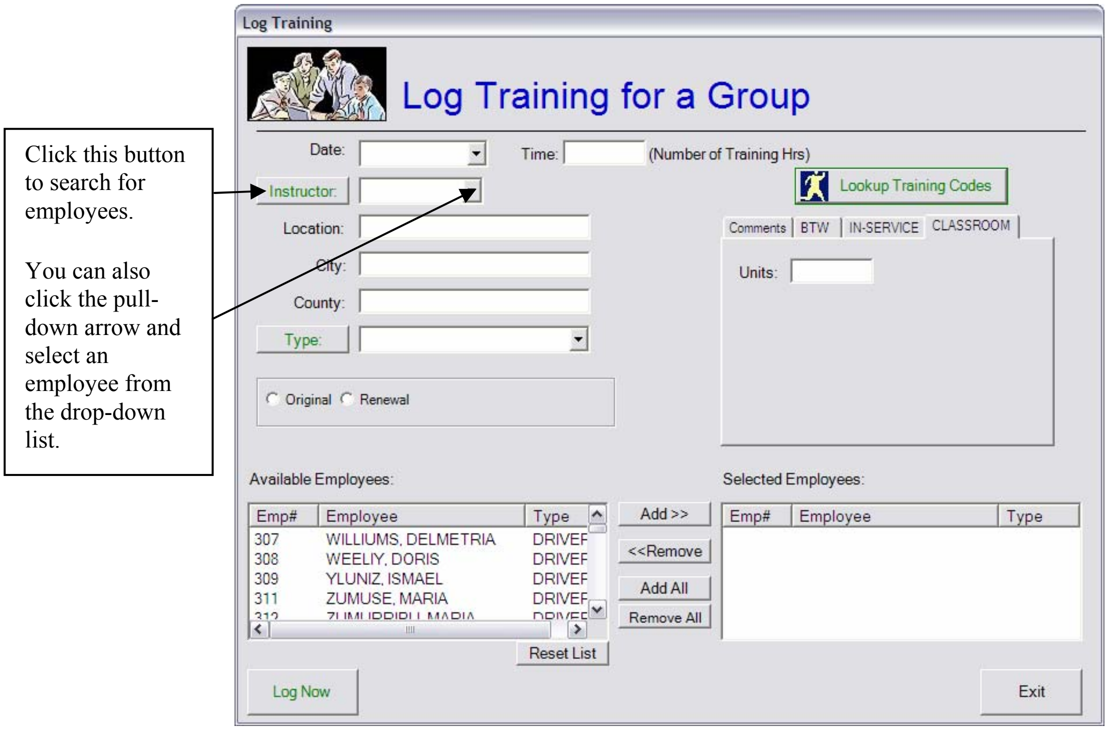


Figure 4-32. Searching for instructors

The Employee Management system displays the Find an Employer screen.

2. Type in the criteria you want to use to search for the employee.

Figure 4-33 shows the results of using the Employee Type as the search criteria:

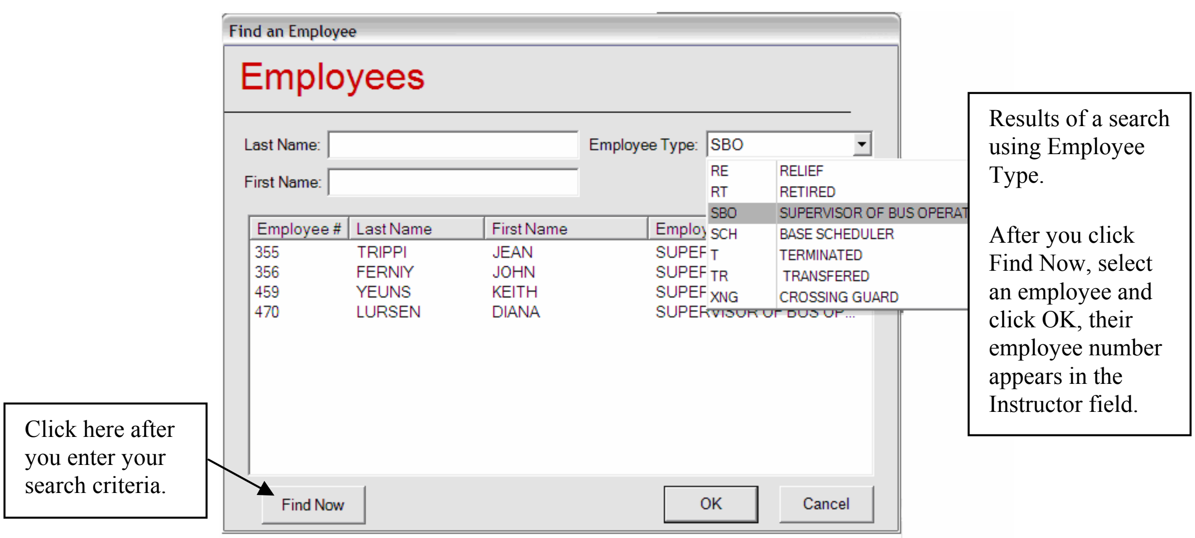


Figure 4-33. Selecting an instructor

3. Click the Find Now button to search for employees matching your search criteria.

4. Select the employee, and click the OK button. The Employee Management system closes the screen and displays the selected employee's identification number in the Instructor field:

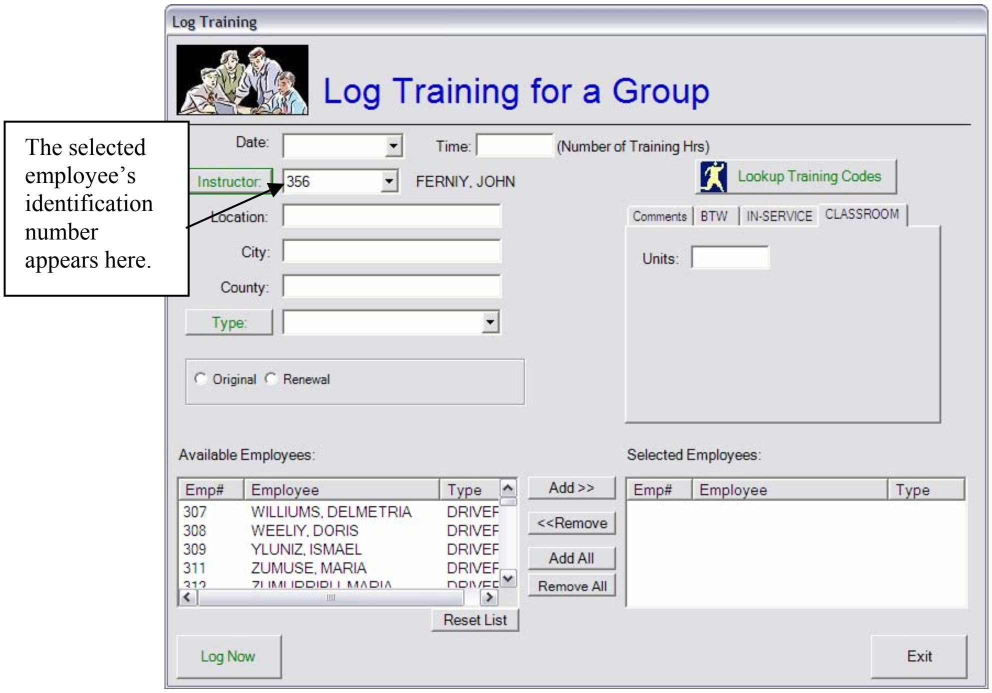


Figure 4-34. Adding the instructor to the training record

Searching the Training Types

The procedure below shows you how to search for a training type, or category, by clicking the Type button. You can also choose a training type by clicking the pull-down arrow and selecting the type from the drop-down list. However, if you have many training types in your database, you might find that it is faster to click the Type button and use the procedure below to select the training type rather than scrolling through the drop-down list.

1. Click the Type button.

Click this button to search for training types.

You can also click the pull-down arrow and select a training type from the drop-down list.

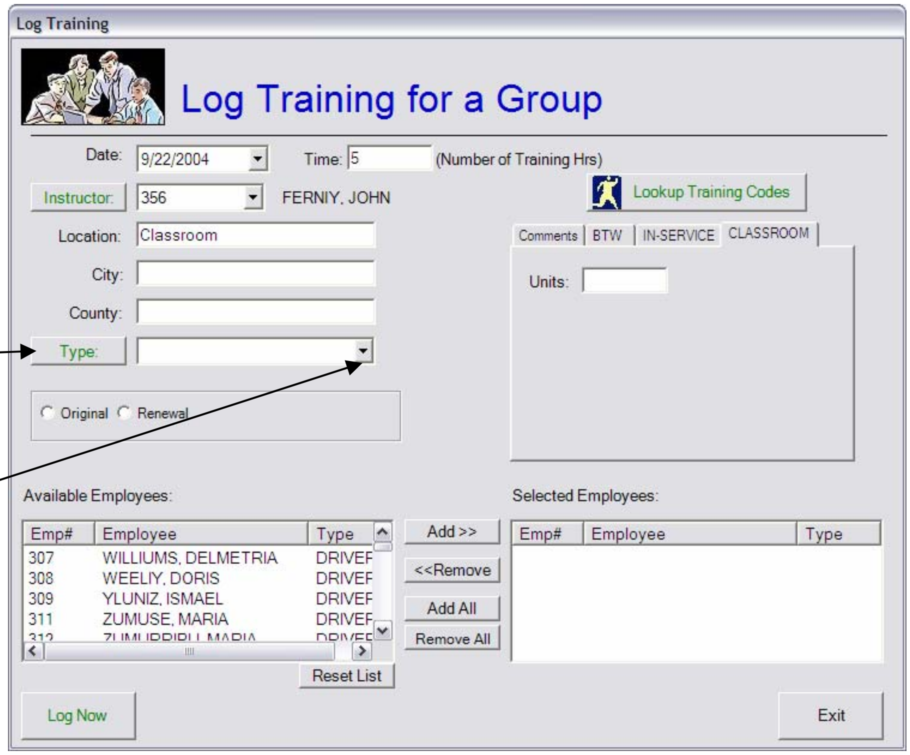
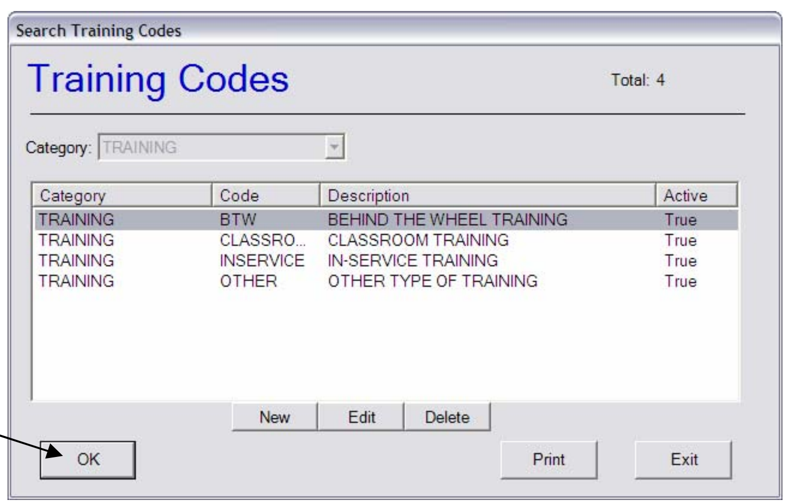


Figure 4-35. Searching for training types

The Employee Management system displays the Search Training Codes screen.

2. Select the training code.

Figure 4-36 shows selecting the BTW (Behind the Wheel) training code:



Click here after you select the training code.

Figure 4-36. Selecting an instructor

3. Select the training code, and click the OK button. The Employee Management system closes the screen and displays the selected training code in the Type field:

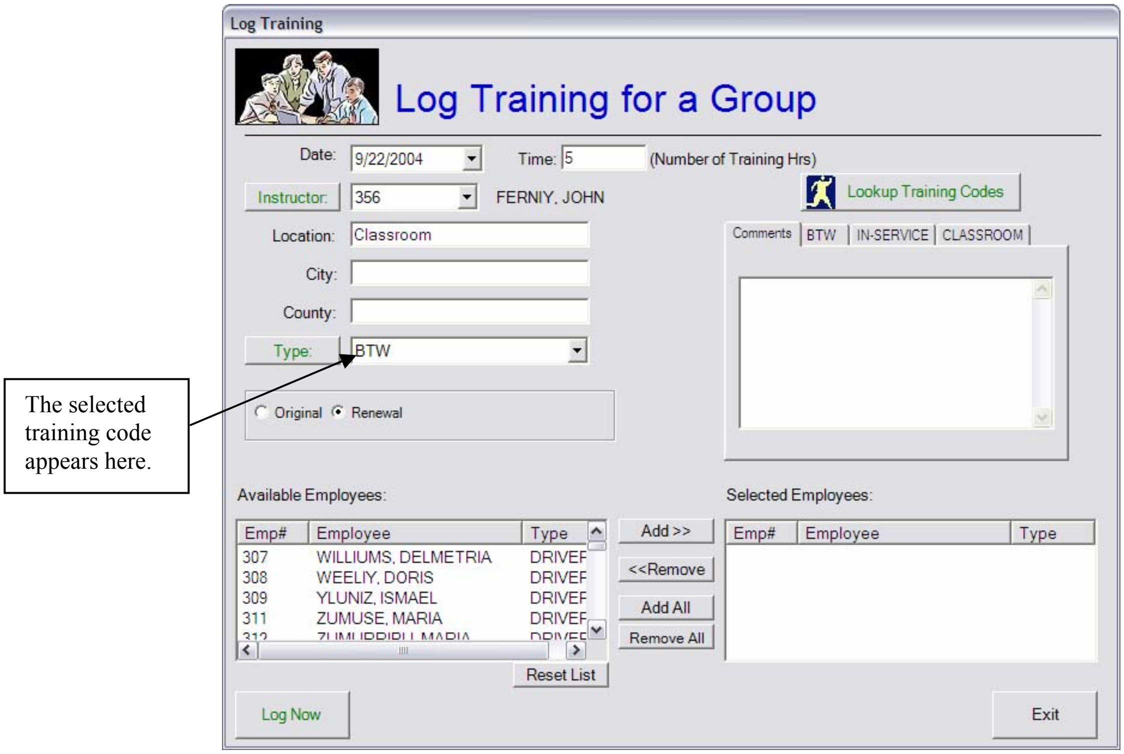


Figure 4-37. Adding the training type to the training record

Looking Up Training Codes

As discussed previously, you can add the general training category (such as In-Service) to the training record. When you look up codes and then type them into these fields, the Employee Management system does *not* check your entries to ensure they are valid entries. If you type more than one code into one of these fields, you might find it easier to read your entries if you separate them with commas.

The procedure below shows you how to look up a training code by clicking the Lookup Training Codes button. If you know the training code, you can type it into the appropriate code box on the BTW or In-Service tabs.

To look up and add the training code:

1. Click the Lookup Training Codes button.

   The Employee Management system displays the Search Training Codes screen.

2. Select the training category by clicking the pull-down arrow.

   Figure 4-38 shows selecting the BTW (Behind the Wheel) training code:

After you select a category, you can see all the training codes associated with that category.

Click here after you select the training code.

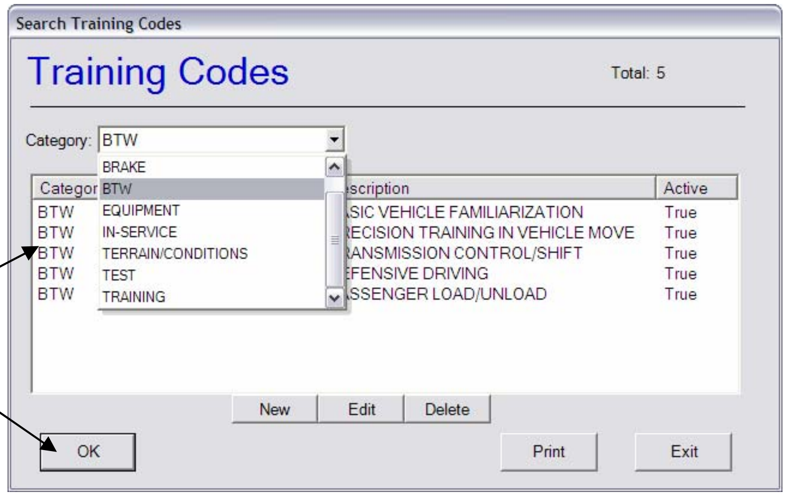


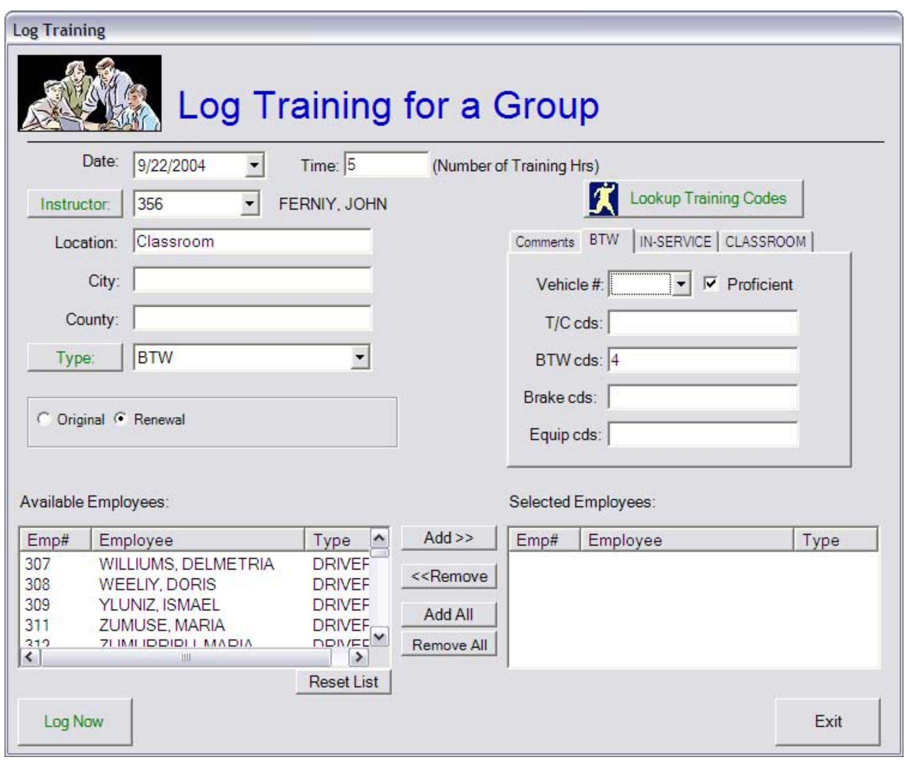
Figure 4-38. Selecting a training category

3. Find the code that describes the training.

4. Click the OK button. .

4. Type the training code into the appropriate box on the BTW or In-Service tab.

   Figure 4-39 shows the code of 4, the code for Defensive Driving, added to the BTW tab:



Type the training code into the appropriate box on the BTW or In-Service tab.

Figure 4-39. Adding the training code to the training record

Applying Group Training Hours Against Group Employee Training Reminders

To track the number of hours required for an employee for a certain category of training, you must create a training reminder in the T.O.M. Employee Management Software.When you add training hours to the system for a group of employees, you can apply completed hours to the training reminder. For example, suppose employees must complete 20 in-service hours and that they just completed five of those hours.

When you add the training record to the system, you can specify that those five hours be applied to the reminder. The Employee Management system deducts the completed hours, so the training reminder now shows that the employee now has 15 hours to complete.

Where can I learn more about training reminders?

Refer to Chapter 2 for more information about setting up reminders for individual employees as well as group reminders.

ⓘ ***T.O.M Tip***

To apply group training hours against group employee reminders:

1. Complete the group training screen.

2. Click the Log Now button. The Employee Management system displays the Apply Training Hours for a Group screen.

Click here to apply the hours to a group reminder.

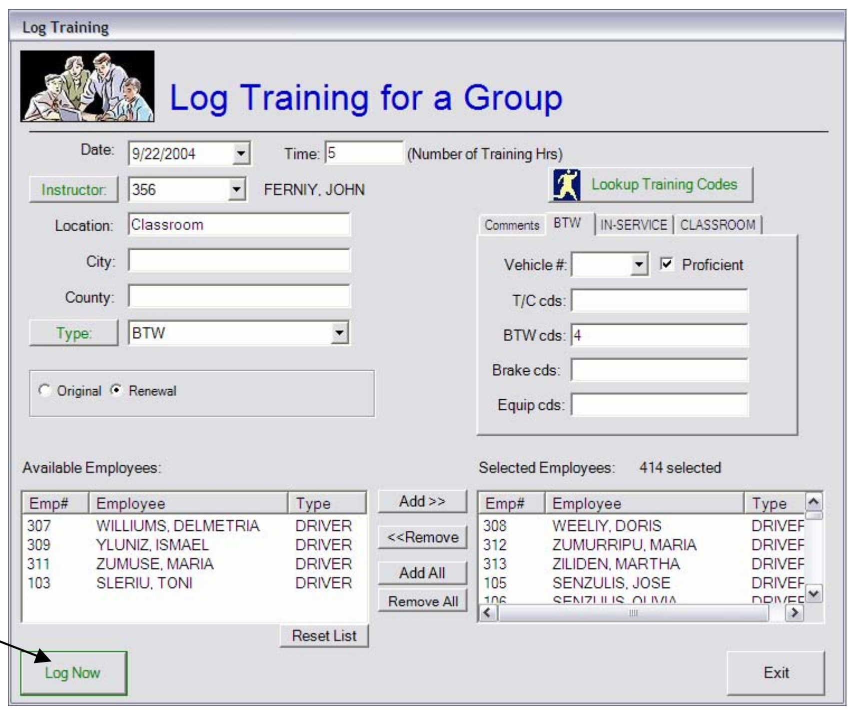


Figure 4-40. Applying training hours to an open group reminder

The Employee Management system displays the Select Reminder and Apply Training Hours screen which shows all open group reminders..

3. Select the open group reminder you want to apply the training hours to. Figure 4-41 shows that the group reminder list is being filtered so that only BTW group reminders are displayed:

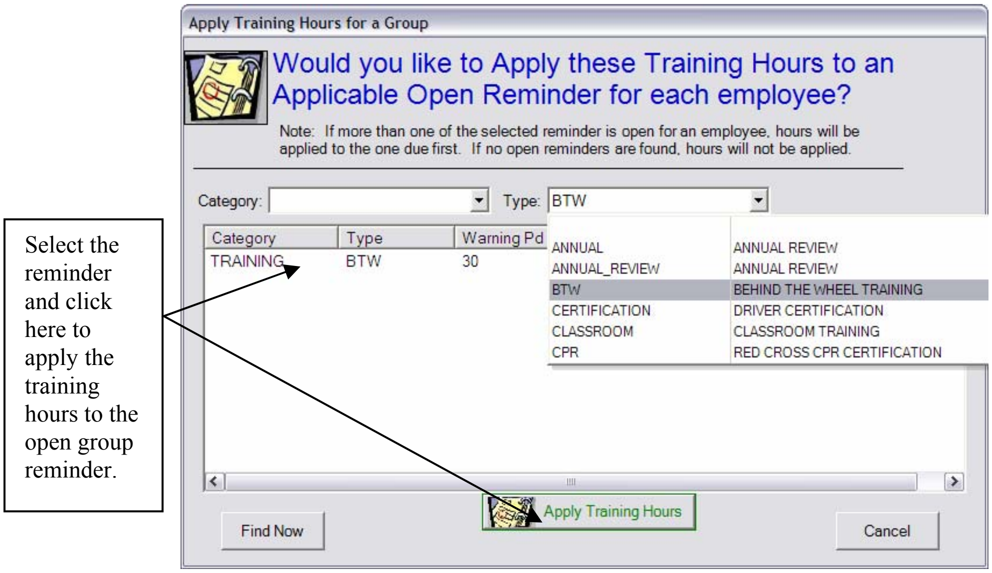


Figure 4-41. Selecting an open group reminder and apply training hours to it

4.. Click the Apply Training Hours button. The Employee Management system applies the hours to the open group reminder and displays a dialog when this process is complete.

Editing an Individual Employee's Training Records

1. In the individual Employee Training screen, select the training record you want to update, and click Edit. You can also double-click the training record (Figure 4-42).

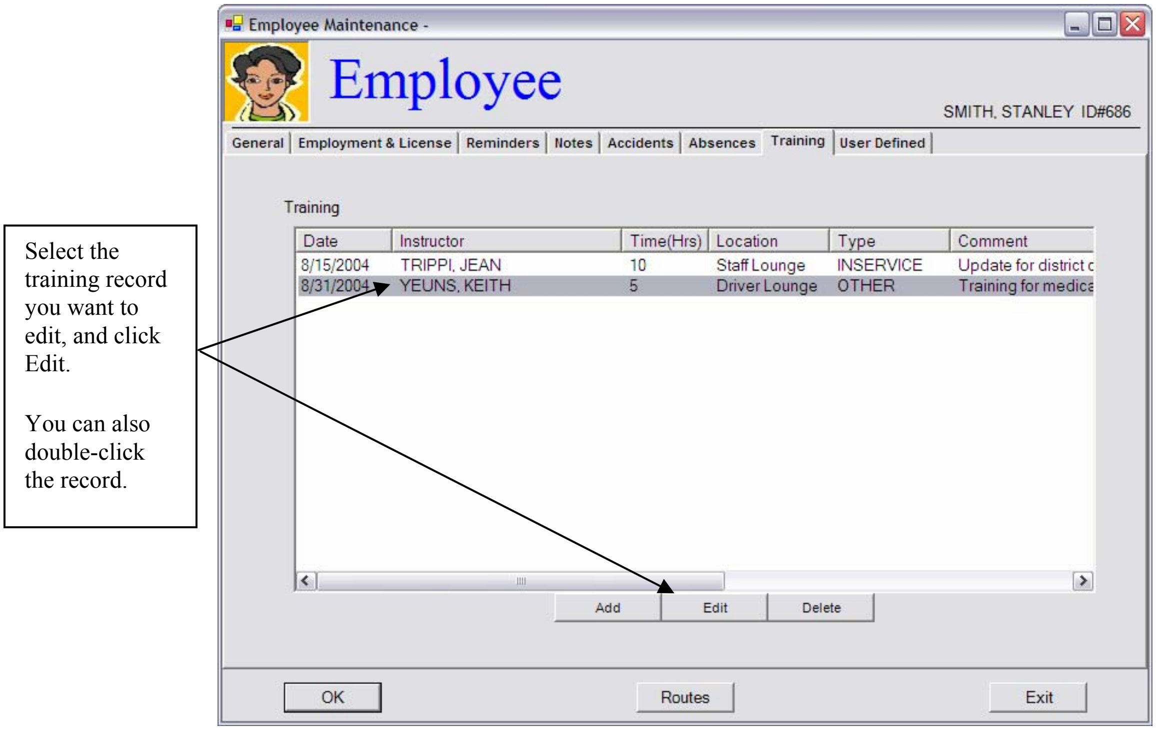


Figure 4-42. Editing training records

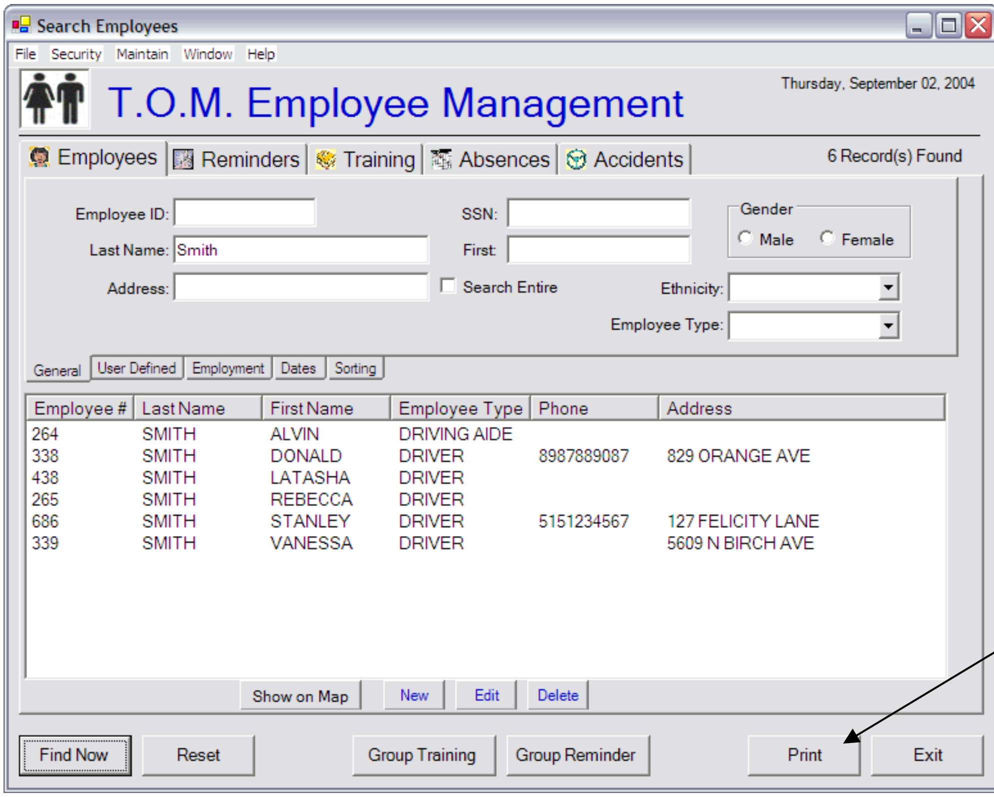
The Employee Management system displays the Employee Training screen.

2. Update the training record.

3. Click OK to save your changes. The Employee Management system closes the screen and updates the employee's training record.

Generating and Printing Training Reports

You can generate and print several types of training reports for an employee or a group of employees by clicking the Print button. When you click the Print button, the Employee Management system displays a dialog that allows you to select the type of training report you want to generate and to type in its title.



Click the Print button to generate and print a training report.

NOTE: For more information about generating and printing reminder reports, see Chapter 13 of the Users section.

Deleting Training Records

When you delete training from an employee's record, the Employee Management system removes it from the employee's record and adds the hours attributed to the training back to the number of hours required for completion.

To delete training from an employee's record:

1. Access the record of the employee whose training you want to adjust. The Employee Management system displays the Employees screen.

2. Click the Training tab. The Employee Management system displays the training records.

3. Select the training you want to delete (). The Employee Management system asks if you are sure you want to delete the record.

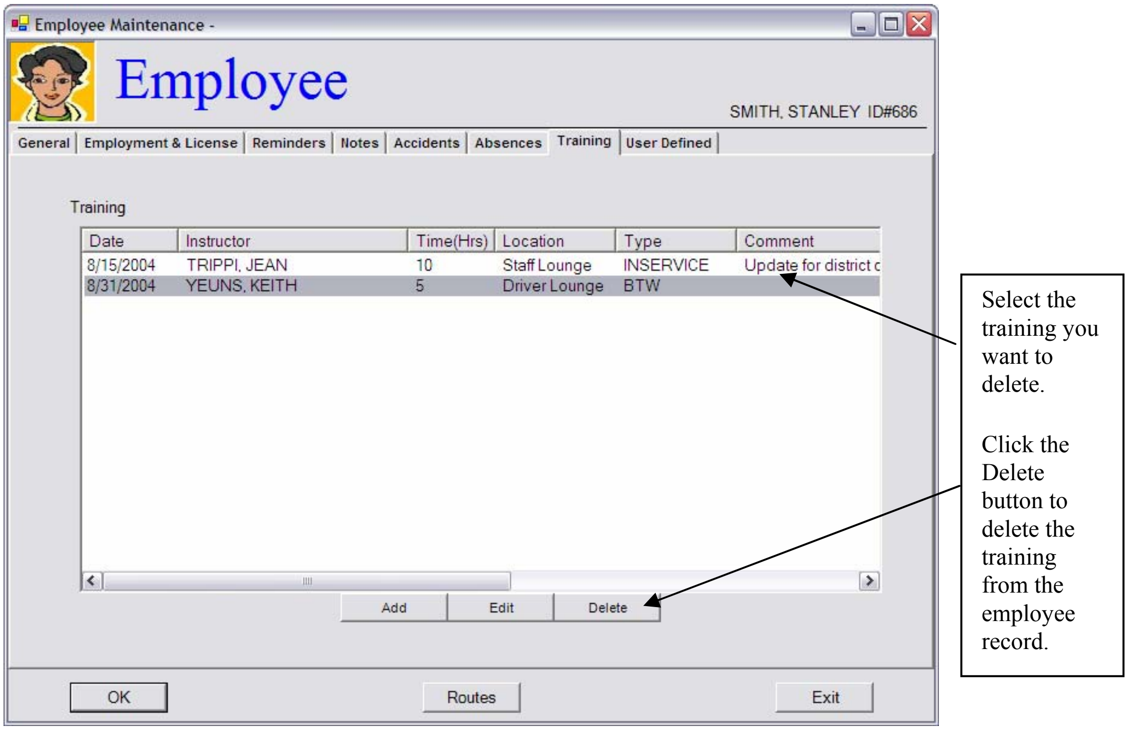


Figure 4-43. Deleting training from an employee record

4. Click OK to delete the absence. The Employee Management system deletes the training from the employee's record.