

HUMAN RESOURCES

ADD EMPLOYEE COMPETENCE RECORDS (TRAINING COURSES)

The Competence Management process is used to track and manage the competence requirements of your organisation and help identify any gaps or qualifications that need to be updated.

These competence requirements will fulfil the skills or crafts that may be necessary for employees to fulfil their role within the company.

This module will also enable you to keep track of qualification status and expiry.

Ribbon Access: Finance / HR Employees



The **Employees** listing screen will display.

SELECT EMPLOYEE

- Use the **row selector** to highlight the employee you wish to add **qualification** or **training course** details to.
- Click on the **Competence Management** tile.

EmpNo	EmployeeID	FullName	EmailAddress	Manager	DepartmentName
335	CLA496	Aslirn Clay	aslirn.clay@texampledomain.co.za	Malaysia Price	Maintenance
1008	DUB578	AJ Dube	AJ.Dube@co3.co.za	Julanda Kessler	0
555	TOD964	Alaya Todd	alaya.todd@texampledomain.co.za	Phoebe McClan	Quality Assurance
623	LAF902	Alana Lang	alana.lang@texampledomain.co.za	Timothy Palacios	Stock Control
825	ROB989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofa Simmons	Sales
115	SHE536	Alanna Sheppard	alanna.sheppard@texampledomain.co.za	Dulce Nixon	Development
872	PER713	Alanc Perkins	alanc.perkins@texampledomain.co.za	Sofa Simmons	Sales
101	GLE261	Alaya Guerrero	alaya.guerrero@texampledomain.co.za	Dulce Nixon	Service Centre
300	HEN331	Albert Herson	albert.herson@texampledomain.co.za	Harley Briggs	Quality Assurance
19	SDN261	Aleena Singh	aleena.singh@texampledomain.co.za	Elanna Pugh	Human Resources
291	WAR246	Aleena Ware	aleena.ware@texampledomain.co.za	Rory Schneider	Marketing
400	BAR109	Alex Barron	alex.barron@texampledomain.co.za	Corbin McConnell	Projects
724	COL656	Alexander Coleman	alexander.coleman@texampledomain.co.za	Roman Simpson	Service Centre
287	SHE787	Alexandra Sheppard	alexandra.sheppard@texampledomain.co.za	Aslirn Clay	Maintenance
643	AGU269	Alexandra Aguirre	alexandra.aguirre@texampledomain.co.za	Timothy Palacios	0
339	DAJ005	Alexandra Daugherty	alexandra.daugherty@texampledomain.co.za	Violeta Spence	Sales
179	HJH022	Alexandra Huynh	alexandra.huynh@texampledomain.co.za	Leslie Miles	Implementations
181	SAL298	Alexis Saller	alexis.saller@texampledomain.co.za	Leslie Miles	0
152	NGU219	Alfred Nguyen	alfred.nguyen@texampledomain.co.za	Dulce Nixon	Service Centre
349	BRAB79	Alia Branch	alia.branch@texampledomain.co.za	Malaysia Price	Administration
3	FOX967	Alanna Fox	alanna.fox@texampledomain.co.za	Antonio Gordon	Accounts
1011	DRE001	Alice Drew		Eden Rowan	Development
869	CAM534	Allison Camacho	allison.camacho@texampledomain.co.za	Sofa Simmons	Administration
175	ZAM565	Allison Zamora	allison.zamora@texampledomain.co.za	Leslie Miles	Engineering
239	EST969	Allie Estrada	allie.estrada@texampledomain.co.za	Averi Alvarado	Projects
461	CUE036	Allison Cuevas	allison.cuevas@texampledomain.co.za	Bella Chase	Contracts

SELECT TRAINING COURSE

- The **Employee Training Courses for : []** screen will open.
- Click on **Add**.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualif.	TrainQualif.	TrainCost	TrainStatus	TrainingRes.	TrainNotes
QT	12/24/2024	12/24/2024	Business Math	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024

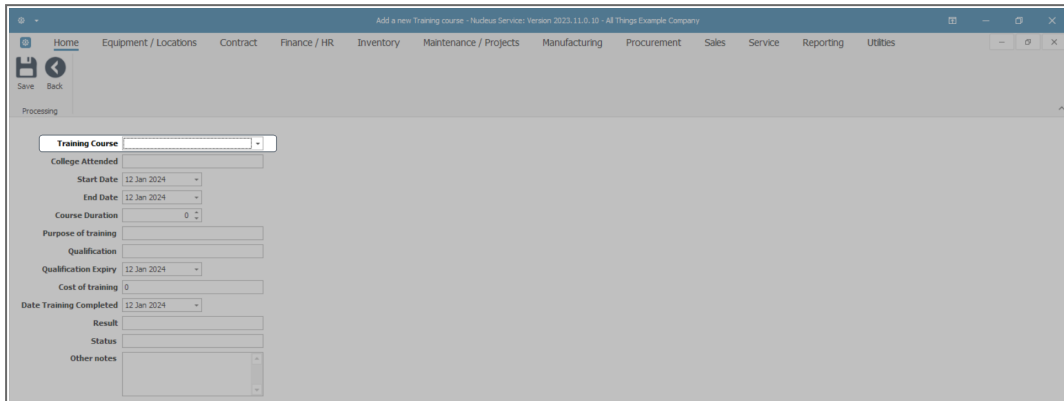
- Or **Right-click** on any row in the data grid.
- A **Process** menu will pop up.
- Click on **Add New Training Course**.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
QT	12/24/2024	12/24/2024	Business Math	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024

Process

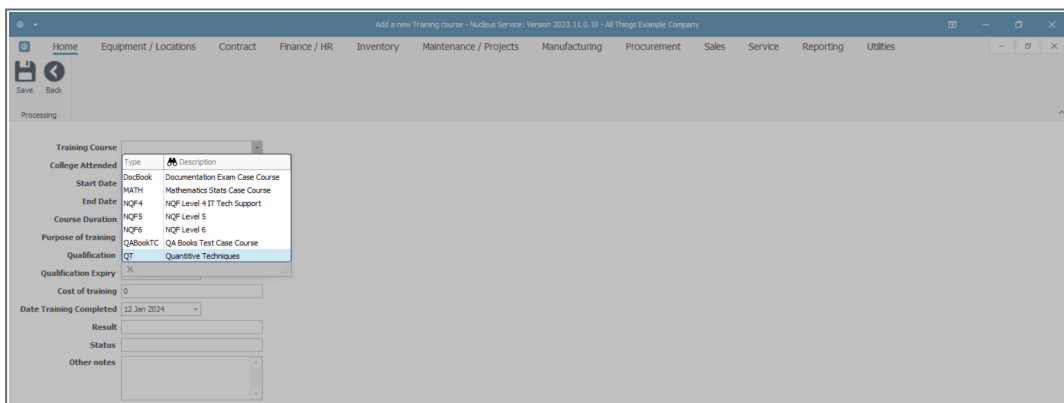
- Add
- Add New Training Course
- ✎ Edit
- ✎ Edit Training Course
- ✖ Delete
- ✖ Delete Training Course

- The **Add a new Training course** screen will open.
- Click on the **drop-down arrow** in the **Training Course** field.



- A Training Course **Type** menu will be displayed.
- Click on the **name** of the training course you wish to add to this employee.
- In this image **Quantative Techniques** has been selected.

Note: If a course you wish to add is not displayed in this list, then it can be [added](#) to this list in the **Configurator**.



ADD TRAINING COURSE DETAILS

- Fill in the remaining details of the training course:

- **Institution:** Type in the name of the institution where you completed this course.
- **Start Date:** Either type in or click on the drop-down arrow and use the calendar function to select the course start date.
- **End Date:** Either type in or click on the drop-down arrow and use the calendar function to select the course end date.
- **Course Duration:** Either type in or use the directional arrows to select the course duration.
- **Purpose of Training:** Type in the reason for the employee attending this training course.
- **Qualification:** Type in the type of qualification that will be awarded when the course has been successfully completed.
- **Qualification Expiry:** Either type in or click on the drop-down arrow and use the calendar function to select the course qualification expiry date.
- **Cost of Training:** Type in the amount of the training course.
- **Date Training Completed:** Either type in or click on the drop-down arrow and use the calendar function to select the date that the training was completed.
- **Result:** Type in the result of the employee (e.g. Distinction, Merit, Pass).
- **Status:** Type in the status of the course (e.g. A-Active, I-Inactive) depending on whether, for example, the course content needs to be reviewed on an annual basis.

- **Other Notes:** Type in any other relevant notes, as required.

SAVE TRAINING COURSE DETAILS

- Click on **Save**.

Processing

Training Course	Quantitative Techniques
College Attended	Unisa
Start Date	02 Oct 2023
End Date	12 Jan 2024
Course Duration	4
Purpose of training	Business Mathematics Training
Qualification	Certificate in BMT
Qualification Expiry	12 Jan 2044
Cost of training	5000
Date Training Completed	12 Jan 2024
Result	Passed
Status	Active
Other notes	Next Training July 2024

- A message box will pop up advising the following:
 - **Training Course has been saved.**
- Click on **Ok**.

Processing

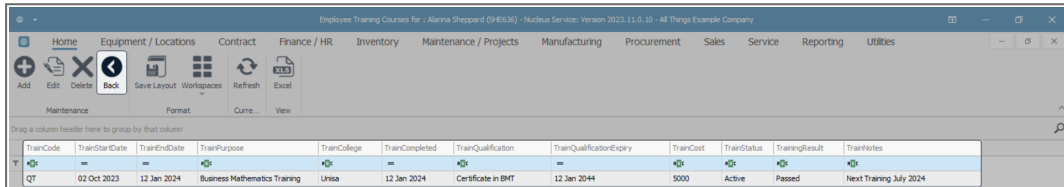
Training Course	Quantitative Techniques
College Attended	Unisa
Start Date	02 Oct 2023
End Date	12 Jan 2024
Course Duration	4
Purpose of training	Business Mathematics Training
Qualification	Certificate in BMT
Qualification Expiry	12 Jan 2044
Cost of training	5000
Date Training Completed	12 Jan 2024
Result	Passed
Status	Active
Other notes	Next Training July 2024

Training Course has been saved

OK

VIEW ADDED TRAINING COURSE

- You will return to the **Employee Training Courses for: []** screen.
- Here you can **view** the data grid with the newly added training course for that employee.
- Click on **Back** to return to the **Employees** listing screen.

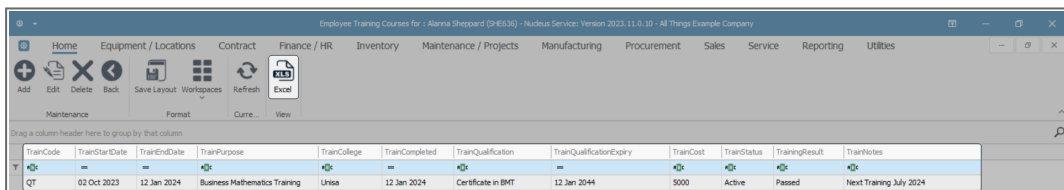


TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Mathematics Training	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024

- Or export data to Excel, if required.

EXPORT TO EXCEL

- In the **Employee Training Courses for: []** screen.
- Click on **Excel**.



TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Mathematics Training	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024

- This will open an MS Excel spreadsheet with all the data from the data grid.
- You can choose to save, view, search for data, prepare it for printing, and so on, as required.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualification Expiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Mathematics Training	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024

EDIT COMPETENCE MANAGEMENT

SELECT EMPLOYEE

- In the **Employees** listing screen -
- Select the **row** of the employee whose Competence Management details you wish to **edit**.
- Click on the **Competence Management** tile in the **Links** panel.

idEm	EmployeeNo	FullName	EmailAddress	Manager	DepartmentName
393	Q08863	Garina Gordon	garina.gordon@attexampdomain.co.za	Elbert Garcia	HR
394	FRV857	Karlar Fyfe	karlar.fyfe@attexampdomain.co.za	Ayla Pittman	Manufacturing
395	WIS417	Rayna Wise	rayna.wise@attexampdomain.co.za	Calliope Gillespie	Marketing
396	RE7356	Frederick Reid	frederick.reid@attexampdomain.co.za	Ayla Pittman	Marketing
397	MED651	Charlee Medina	charlee.medina@attexampdomain.co.za	Serna Enriquez	Operations
398	BOY476	George Boyd	george.boyd@attexampdomain.co.za	Ayla Pittman	Operations
399	ML374	Georgia Mills	georgia.mills@attexampdomain.co.za	Ayla Pittman	Administration
400	BAR109	Alex Barron	alex.barron@attexampdomain.co.za	Corbin McCormell	Administration
401	VEG815	Anya Vega	anya.vega@attexampdomain.co.za	Ayla Pittman	Projects
402	LIN969	Aidan Lindsey	aidan.lindsey@attexampdomain.co.za	Ayla Pittman	Purchasing
403	RUI976	Collette Ruiz	collette.ruiz@attexampdomain.co.za	Ayla Pittman	Purchasing
404	DS409	Austin Dean	austin.dean@attexampdomain.co.za	Skatt Whitney	Quality Assurance
405	FLO553	Jilanna Floyd	jilanna.floyd@attexampdomain.co.za	Ayla Pittman	Quality Assurance
406	TRE039	Pierce Trevino	pierce.trevino@attexampdomain.co.za	Ayla Pittman	Administration
407	TAT108	Priscilla Tate	priscilla.tate@attexampdomain.co.za	Ayla Pittman	Safety
408	STA369	Dalton Stark	dalton.stark@attexampdomain.co.za	Lorelei Houston	Sales
409	RIC876	Kamalah Richmond	kamalah.richmond@attexampdomain.co.za	Ayla Pittman	Sales
410	KEL688	Mordechai Kelly	mordechai.kelly@attexampdomain.co.za	Emmitt Jensen	Security
411	BRV995	Ruby Bryant	ruby.bryant@attexampdomain.co.za	Ayla Pittman	Security
412	CAR677	Jonah Carson	jonah.carson@attexampdomain.co.za	Odin Montes	Service Centre
413	MOJ109	Naleni Molina	naleni.molina@attexampdomain.co.za	Ayla Pittman	Service Centre
414	HOJ527	Prince Hood	prince.hood@attexampdomain.co.za	Blase Vincent	Stock Control
415	ACE151	Briana Acevedo	briana.acevedo@attexampdomain.co.za	Ayla Pittman	Stock Control
416	BOO197	Dakari Booker	dakari.booker@attexampdomain.co.za	Zavier Patton	Service Centre
417	ENG589	Nataly English	nataly.english@attexampdomain.co.za	Ayla Pittman	Service Centre
418	ARC389	Junior Archer	junior.archer@attexampdomain.co.za	Ayla Pittman	Sales

SELECT TRAINING COURSE

- The **Edit Training Courses for : []** screen will open.
- Select the **row** of the Training Course you wish to **edit**.

- Click on **Edit**.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
DocBook	12 Jan 2024	12 Jan 2024	Writing Skills	Unisa	12 Jan 2024	Certificate in Documentation	12 Oct 2050	8000	Active	Passed	Junior Technical Author
ISTQB	02 Oct 2023	05 Jan 2024	Software Tester	Unisa	12 Jan 2024	International Diploma	12 Jun 2050	3000	Active	Passed	Next training 2025
Acc70866	16 Jan 2024	16 Jan 2024	Bookkeeping a...	UNESA	16 Jan 2024	Bookkeeper	16 Jan 2024	7612	Active	Passed	

- Or **right-click** on the row of the Training Course you wish to **edit**.
- A **Process** menu will pop up.
- Click on **Edit Training Course**.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
DocBook	12 Jan 2024	12 Jan 2024	Writing Skills	Unisa	12 Jan 2024	Certificate in Documentation	12 Oct 2050	8000	Active	Passed	Junior Technical Author
ISTQB	02 Oct 2023	05 Jan 2024	Software Tester	Unisa	12 Jan 2024	International Diploma	12 Jun 2050	3000	Active	Passed	Next training 2025
Acc70866	16 Jan 2024	16 Jan 2024	Bookkeeping a...	UNESA	16 Jan 2024	Bookkeeper	16 Jan 2024	7612	Active	Passed	

- The **Edit Training course** screen will open.
- The **Training Course** field is inactive and 'greyed out', therefore the information in this field cannot be edited from this screen.
- All other fields are editable - you can backspace over or delete existing content, and / or type directly in a field to make any necessary adjustments.

Processing

Training Course	Fundamental Accounting
College Attended	UNISA
Start Date	16 Jan 2024
End Date	16 Jan 2024
Course Duration	12
Purpose of training	Bookkeeping and basic financial reporting
Qualification	Bookkeeper
Qualification Expiry	16 Jan 2024
Cost of training	7,612.00
Date Training Completed	16 Jan 2024
Result	Passed
Status	Active
Other notes	

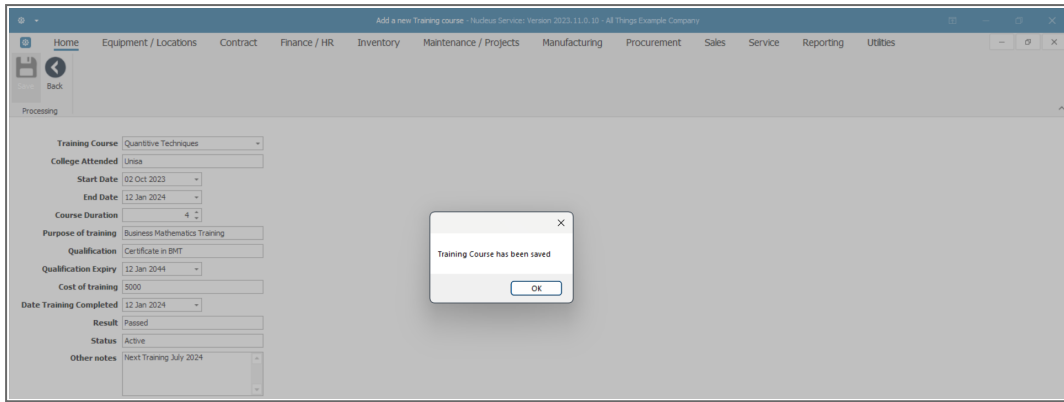
SAVE TRAINING COURSE DETAILS

- In this example, the **Expiry Date** has been amended.
- Click on **Save**.

Processing

Training Course	Fundamental Accounting
College Attended	UNISA
Start Date	16 Jan 2024
End Date	16 Jan 2024
Course Duration	12
Purpose of training	Bookkeeping and basic financial reporting
Qualification	Bookkeeper
Qualification Expiry	16 Feb 2024
Cost of training	7,612.00
Date Training Completed	16 Jan 2024
Result	Passed
Status	Active
Other notes	

- A message box will pop up, advising the following:
 - **Training Course has been saved.**
- Click on **Ok**.



VIEW AMENDED TRAINING COURSE

- You will return to the **Employee Training Courses for: []** screen.
- Here you can **view** the data grid with the edited training course for that employee.
- Click on **Back** to return to the **Employees** listing screen.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
Docbook	12 Jan 2024	12 Jan 2024	Writing Skills	Unisa	12 Jan 2024	Certificate in Documentation	12 Oct 2050	8000	Active	Passed	Junior Technical Author
ISTQB	02 Oct 2023	05 Jan 2024	Software Tester	Unisa	12 Jan 2024	International Diploma	12 Jun 2050	3000	Active	Passed	Next training 2025
Acc70866	16 Jan 2024	16 Jan 2024	Bookkeeping and basic financial reporting skills.	UNISA	16 Jan 2024	Bookkeeper	16 Feb 2026	7612	Active	Passed	

DELETE COMPETENCE MANAGEMENT

SELECT EMPLOYEE

- In the **Employees** listing screen -
- Select the **row** of the employee for whom you wish to **delete** Competence Management details.
- Click on the **Competence Management** tile in the **Links** panel.

Full Name	Email Address	Manager	Department Name
Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofa Simmons	Sales
Alanna Sheppard	alanna.sheppard@tattexampdomain.co.za	Dulce Nixon	Development
Alicia Perkins	alicia.perkins@tattexampdomain.co.za	Sofa Simmons	Sales
Alycia Guerrero	alycia.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
Albert Henson	albert.henson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
Aleena Singh	aleena.singh@tattexampdomain.co.za	Elanna Pugh	Human Resources
Aleena Ware	aleena.ware@tattexampdomain.co.za	Rory Schneider	Marketing
Alex Barron	alex.barron@tattexampdomain.co.za	Corbin McCannell	Projects
Alexander Coleman	alexander.coleman@tattexampdomain.co.za	Roman Simpson	Service Centre
Alexandra Sheppard	alexandra.sheppard@tattexampdomain.co.za	Aidinn Clay	Maintenance
Alexandra Aguirre	alexandra.aguirre@tattexampdomain.co.za	Timothy Palacios	0
Alexandra Daugherty	alexandra.daugherty@tattexampdomain.co.za	Violeta Spence	Sales
Alexandra Huynh	alexandra.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
Alia Branch	alia.branch@tattexampdomain.co.za	Malaysia Price	Administration
Alma Fox	alma.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
Alice Drew	alice.drew@tattexampdomain.co.za	Eden Rowan	Development
Alison Camacho	alison.camacho@tattexampdomain.co.za	Sofa Simmons	Administration
Alison Zamora	alison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
Alle Estrada	alle.estrada@tattexampdomain.co.za	Averi Alvarado	Projects
Allison Cuevas	allison.cuevas@tattexampdomain.co.za	Bela Chase	Contracts
Allyson Bender	allyson.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
Alma Duran	alma.duran@tattexampdomain.co.za	Ansely Skinner	Sales
Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knapp	Development
Alondra Dyer	alondra.dyer@tattexampdomain.co.za	Dulce Nixon	Implementations

SELECT COMPETENCE MANAGEMENT DETAILS TO DELETE

- The **Employee Training Courses for : []** screen will open.
- Select the **row** that you wish to **delete**.
- Click on **Delete**.

TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Math	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024
Acc70866	03 Jul 2023	24 Jan 2024	Basic Account	Unisa	24 Jan 2024	Accountant	24 Jan 2030	10000	Active	Passed	99 percent marks.
NQP6	25 Jan 2024	25 Jan 2024	NQP	UNISA	25 Jan 2024	NQP	25 Jan 2024	0	Active	Passed	Training

- Or **right-click** on the **row** that you wish to **delete**.
- A **Process** menu will pop up.
- Click on **Delete Training Course**.

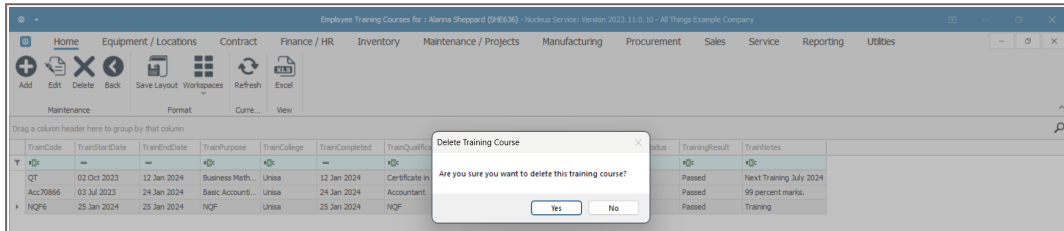
TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Math	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024
Acc70866	03 Jul 2023	24 Jan 2024	Basic Account	Unisa	24 Jan 2024	Accountant	24 Jan 2030	10000	Active	Passed	99 percent marks.
NQP6	25 Jan 2024	25 Jan 2024	NQP	Unisa	25 Jan 2024	NQP	25 Jan 2024	0	Active	Passed	Training

Process

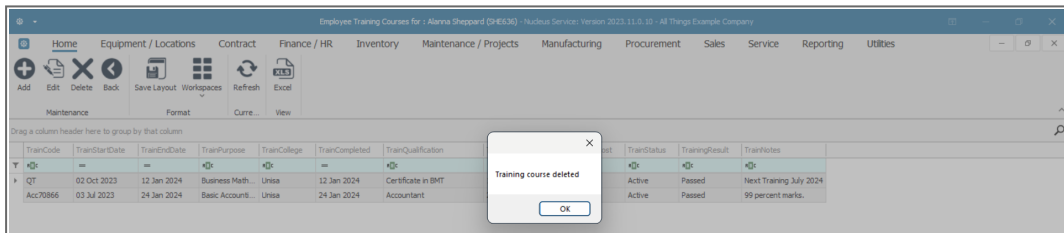
- Add New Training Course
- Edit Training Course
- Delete Training Course

CONFIRM DELETION

- A **Delete Training Course** message box will pop up asking -
 - **Are you sure you want to delete this training course?**
- Click on **Yes**.

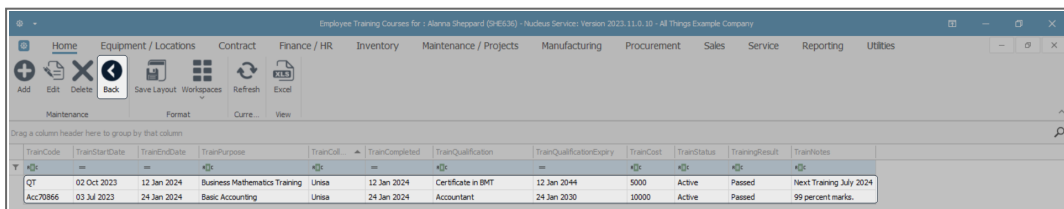


- A message box will pop up informing you -
 - **Training course Deleted.**
- Click on **OK**.



VIEW DELETION RESULTS

- You will return to the **Employee Training Courses for : []** screen where the selected training course details have been removed from the data grid.
- Click on **Back** to return to the **Employees** listing screen.





MNU.021.005

