

# 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.

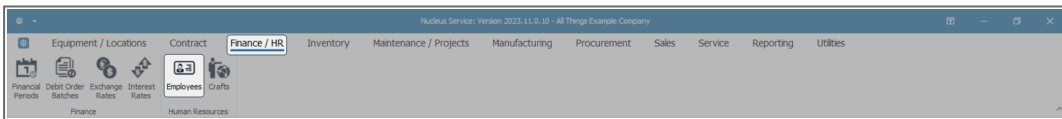
These competence requirements will fulfil the skills or crafts that may be necessary for employees to fulfil their role within the company.

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

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### Ribbon Access: Finance / HR Employees

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The **Employees** listing screen will display.

## SELECT EMPLOYEE

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

ID	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	RO989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofia Simmons	Sales
115	SH636	Alanna Sheppard	alanna.sheppard@texampledomain.co.za	Dulce Nixon	Development
872	PER713	Alanc Perera	alanc.perera@texampledomain.co.za	Sofia 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	SD261	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	SH6787	Alexandra Sheppard	alexandra.sheppard@texampledomain.co.za	Aslirn Clay	Maintenance
643	AGU269	Alexandra Aguirre	alexandra.aguirre@texampledomain.co.za	Timothy Palacios	0
339	DAJ005	Alexandria Daugherty	alexandria.daugherty@texampledomain.co.za	Violeta Spence	Sales
179	HJ1032	Alexandria Huynh	alexandria.huynh@texampledomain.co.za	Leslie Miles	Implementations
181	SAL298	Alexis Saller	alexis.saller@texampledomain.co.za	Leslie Miles	0
152	NGJ219	Alfred Nguyen	alfred.nguyen@texampledomain.co.za	Dulce Nixon	Service Centre
349	BR4879	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	Sofia Simmons	Administration
175	ZAM565	Allison Zamora	allison.zamora@texampledomain.co.za	Leslie Miles	Engineering
239	EST969	Alle Estrada	alle.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

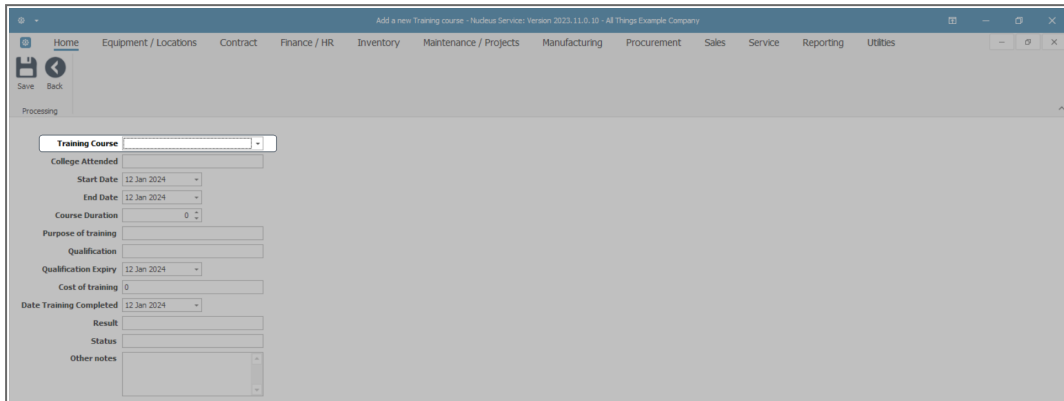
- Or **Right-click** on any row in the data grid.
- A **Process** menu will pop up.
- Click on **Add New Training Course**.

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**

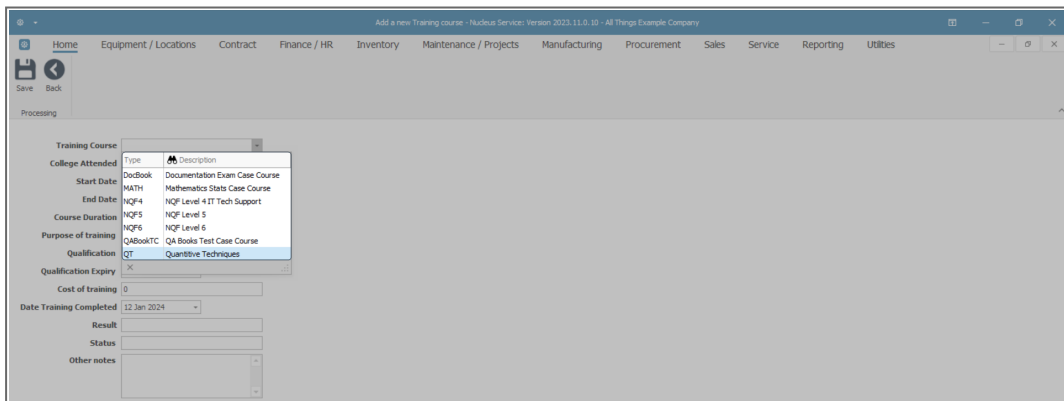
- Add
- Add New Training Course
- ✎ Edit
- ✎ Edit Training Course
- ✖ Delete
- ✖ Delete Training Course

- 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**.



Type	Description
Docbook	Documentation Exam Case Course
MATH	Mathematics Stats Case Course
NQF4	NQF Level 4 IT Tech Support
NQF5	NQF Level 5
NQF6	NQF Level 6
QABookTC	QA Books Test Case Course
QT	Quantative Techniques

## ADD TRAINING COURSE DETAILS

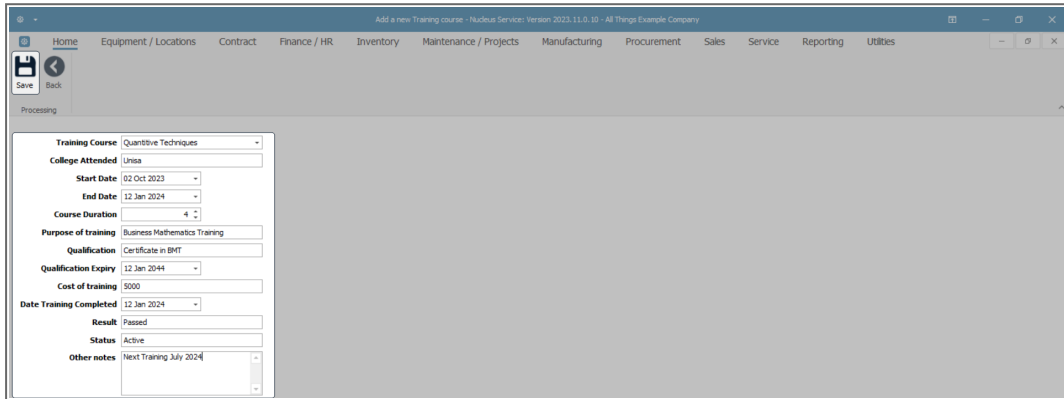
- Fill in the remaining details of the training course:

- **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.

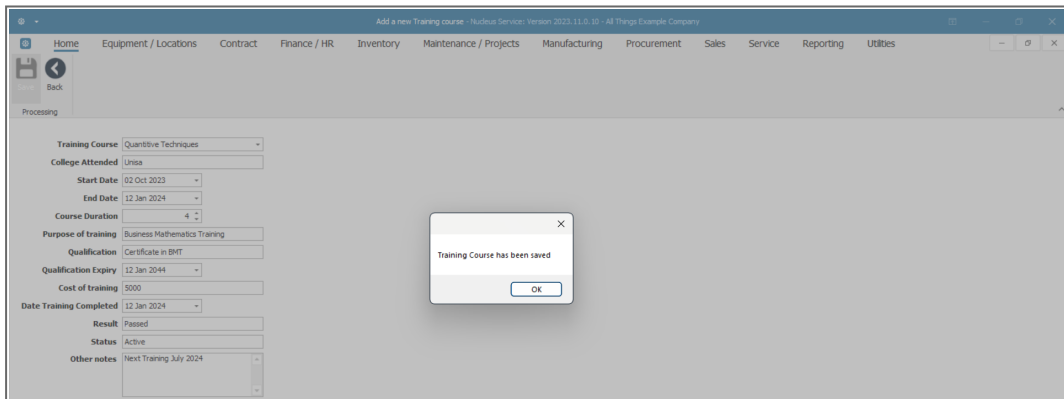
- **Other Notes:** Type in any other relevant notes, as required.

## SAVE TRAINING COURSE DETAILS

- Click on **Save**.



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

EmployeeNo.	Fullname	EmailAddress	Manager	DepartmentName
393	Gemma Gordon	gemma.gordon@attexampdomain.co.za	Ellel Garcia	HR
394	Karlar Fyfe	karlar.fyfe@attexampdomain.co.za	Ayla Pittman	Manufacturing
395	Rayla Wiley	rayla.wiley@attexampdomain.co.za	Calliope Gillespie	Marketing
396	Frederick Reid	frederick.reid@attexampdomain.co.za	Ayla Pittman	Marketing
397	Charlee Medina	charlee.medina@attexampdomain.co.za	Serna Enriquez	Operations
398	George Boyd	george.boyd@attexampdomain.co.za	Ayla Pittman	Operations
399	Georgia Mills	georgia.mills@attexampdomain.co.za	Ayla Pittman	Administration
400	<b>Alex Barron</b>	<b>alex.barron@attexampdomain.co.za</b>	<b>Corbin McCormell</b>	<b>Administration</b>
401	Anya Vega	anya.vega@attexampdomain.co.za	Ayla Pittman	Projects
402	Aidan Lindsey	aidan.lindsey@attexampdomain.co.za	Tru Tate	Purchasing
403	Collette Ruz	collette.ruz@attexampdomain.co.za	Ayla Pittman	Purchasing
404	Austin Dean	austin.dean@attexampdomain.co.za	Skatt Whitney	Quality Assurance
405	Jilenna Floyd	jilenna.floyd@attexampdomain.co.za	Ayla Pittman	Quality Assurance
406	Pierce Trevino	pierce.trevino@attexampdomain.co.za	Ayla Pittman	Administration
407	Priscilla Tate	priscilla.tate@attexampdomain.co.za	Ayla Pittman	Safety
408	Dalton Stark	dalton.stark@attexampdomain.co.za	Lorelei Houston	Sales
409	Kamalah Richmond	kamalah.richmond@attexampdomain.co.za	Ayla Pittman	Sales
410	Mordechai Kelly	mordechai.kelly@attexampdomain.co.za	Emmitt Jensen	Security
411	Ruby Bryant	ruby.bryant@attexampdomain.co.za	Ayla Pittman	Security
412	Jonah Carson	jonah.carson@attexampdomain.co.za	Odin Montes	Service Centre
413	Naleni Molina	naleni.molina@attexampdomain.co.za	Ayla Pittman	Service Centre
414	Prince Hood	prince.hood@attexampdomain.co.za	Blase Vincent	Stock Control
415	Briana Acevedo	briana.acevedo@attexampdomain.co.za	Ayla Pittman	Stock Control
416	Dakari Booker	dakari.booker@attexampdomain.co.za	Zavier Patton	Service Centre
417	Nataly English	nataly.english@attexampdomain.co.za	Ayla Pittman	Service Centre
418	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**.

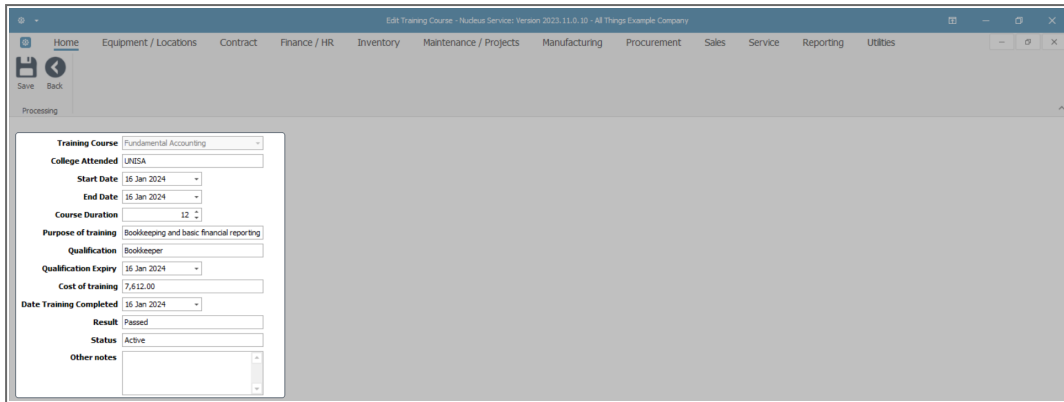
TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainingResult	TrainNotes
DocBook	12 Jan 2024	12 Jan 2024	Writing Skills	Unisa	12 Jan 2024	Certificate in Documentation	12 Oct 2050	8000	Active	Passed	Junior 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

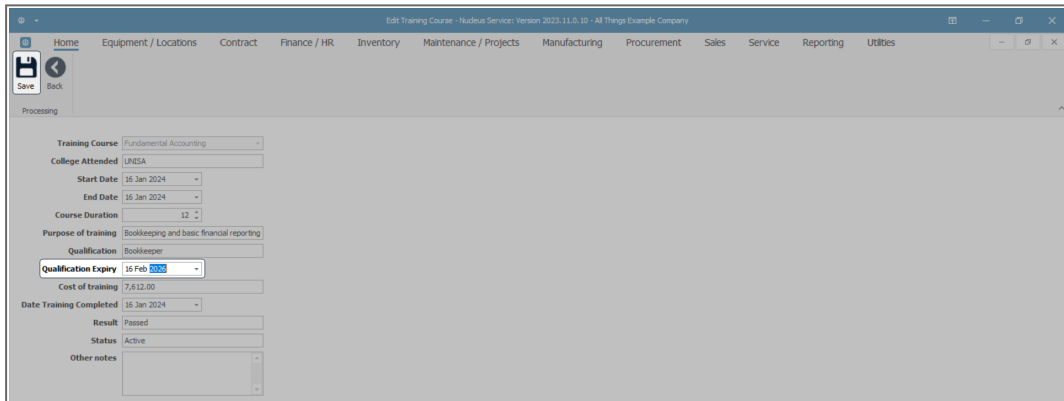
Result: Passed

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

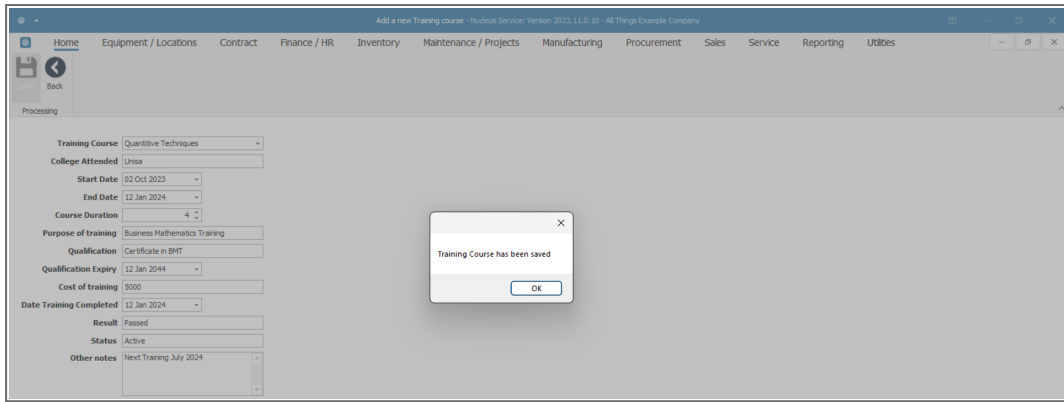
Date Training Completed: 16 Jan 2024

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
Dodbook	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.

Employee ID	Full Name	Email Address	Manager	Department Name
825 RCB989	Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofa Simmons	Sales
115 SHE536	<b>Alanna Sheppard</b>	<b>alanna.sheppard@tattexampdomain.co.za</b>	Dulce Nixon	Development
872 PER713	Alicia Perkins	alicia.perkins@tattexampdomain.co.za	Sofa Simmons	Sales
101 GLE261	Alysa Guerrero	alysa.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300 HEN531	Albert Henson	albert.henson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
19 SNI261	Aleena Singh	aleena.singh@tattexampdomain.co.za	Elanna Fugh	Human Resources
231 WAC246	Aleena Ware	aleena.ware@tattexampdomain.co.za	Rory Schneider	Marketing
400 BAR109	Alex Barron	alex.barron@tattexampdomain.co.za	Corbin McCannell	Projects
724 COL656	Alexander Coleman	alexander.coleman@tattexampdomain.co.za	Roman Simpson	Service Centre
287 SHE787	Alexandra Sheppard	alexandra.sheppard@tattexampdomain.co.za	Aidinn Clay	Maintenance
643 AGU269	Alexandra Aguirre	alexandra.aguirre@tattexampdomain.co.za	Timothy Palacios	0
559 DAU006	Alexandra Daugherty	alexandra.daugherty@tattexampdomain.co.za	Violeta Spence	Sales
179 HUY032	Alexandra Huynh	alexandra.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181 SAL398	Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
152 NGU219	Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
349 BRAB79	Alia Branch	alia.branch@tattexampdomain.co.za	Malaysia Price	Administration
3 FOC967	Alanna Fox	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
1011 DRE011	Alice Drew	alice.drew@tattexampdomain.co.za	Eden Rowan	Development
869 CAM534	Alison Camacho	alison.camacho@tattexampdomain.co.za	Sofa Simmons	Administration
175 ZAM955	Alison Zamora	alison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
239 EST969	Alle Estrada	alle.estrada@tattexampdomain.co.za	Averi Alvarado	Projects
461 CUE936	Allison Cuevas	allison.cuevas@tattexampdomain.co.za	Bela Chase	Contracts
463 BEH946	Allyson Bender	allyson.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51 DUR589	Alma Duran	alma.duran@tattexampdomain.co.za	Ansely Skinner	Sales
587 JAR933	Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knapp	Development
75 DYE318	Amanda Dyer	amanda.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.
<b>NQP6</b>	<b>25 Jan 2024</b>	<b>25 Jan 2024</b>	<b>NQP</b>	<b>UNISA</b>	<b>25 Jan 2024</b>	<b>NQP</b>	<b>25 Jan 2024</b>	<b>0</b>	<b>Active</b>	<b>Passed</b>	<b>Training</b>

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

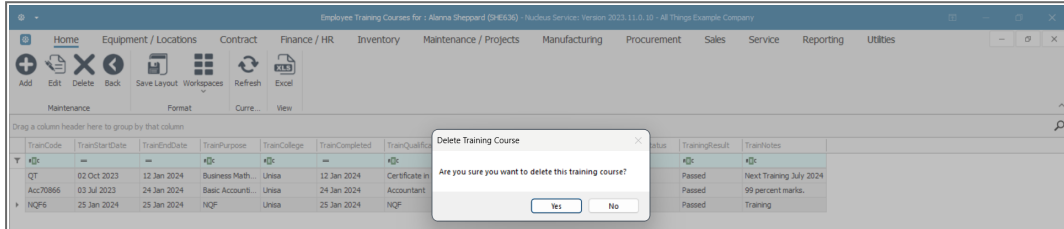
TrainCode	TrainStartDate	TrainEndDate	TrainPurpose	TrainCollege	TrainCompleted	TrainQualification	TrainQualificationExpiry	TrainCost	TrainStatus	TrainResult	TrainNotes
QT	02 Oct 2023	12 Jan 2024	Business Math	Unisa	12 Jan 2024	Certificate in BMT	12 Jan 2044	5000	Active	Passed	Next Training July 2024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

**Process**

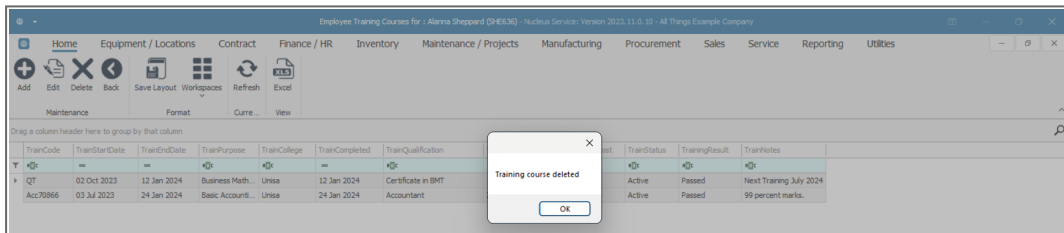
- Add New Training Course
- Edit Training Course
- Delete Training Course**

## 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**.

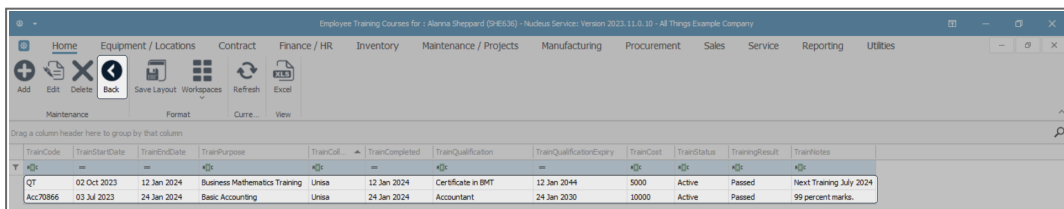


- A message box will pop up informing you -
  - **Training course Deleted.**
- Click on **OK**.



## 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

