

# **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 <u>crafts</u> 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.



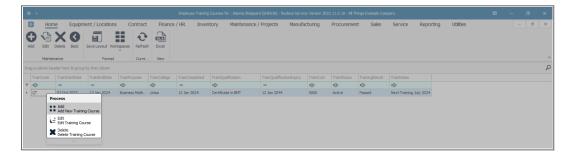
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Overtime and	623 LAN902 825 R08989	Alana Lang Alanna Robertso			ng@attexampledomain.coza		othy Palacios a Simmons	Stock Control				
Holidays	<ul> <li>NU0989</li> <li>115 SHE636</li> </ul>	Alarna Robertso Alarna Shepparo			obertson@attexampledomain.coza heppard@attexampledomain.coza		a simmons te Nixon	Sales				
	872 PER713	Alaric Perkins	,		rkins@attexampledomain.coza		a Simmons	Sales				
Competence	101 GUE261	Alava Guerrero			errero@attexampledomain.coza		e Nixon	Service Centre				
Management	300 HEN531	Albert Henson			enson@attexampledomain.coza		ey Briggs	Quality Assurar				
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Banking Details	643 AGU269	Alexandria Aguir			ia.aguirre@attexampledomain.coza		othy Palacios	0				
	559 DAU006	Alexandria Daug			ia.daugherty@attexampledomain.coz		ta Spence	Sales				
	179 HUY032	Alexandria Huvn			ia.huynh@attexampledomain.coza		ie Miles	Implementation	s			
Custom Details	181 SAL398	Alexis Salas			las@attexampledomain.coza	Lesi	ie Miles	0				
	152 NGU219	Alfred Nguyen		alfred.n	guyen@attexampledomain.coza	Dulo	e Nixon	Service Centre				
	349 BRA879	Alia Branch		alia.brai	ch@attexampledomain.coza	Mala	sysia Price	Administration				
Loans	3 FOX967	Alianna Fox		alianna.	ox@attexampledomain.coza	Anto	onio Gordon	Accounts				
	1011 DRE001	Alice Drew				Eder	n Rowan	Development				
	869 CAM534	Alisson Camacho		alisson.	amacho@attexampledomain.coza	Sofi	a Simmons	Administration				
Organisation Chart	175 ZAM565	Alisson Zamora		alisson.;	amora@attexampledomain.coza	Lesi	ie Miles	Engineering				
	239 EST969	Allie Estrada		alie.est	ada@attexampledomain.coza	Ave	ri Alvarado	Projects				
	481 CUE036	Allison Cuevas		alison.c	vevas@attexampledomain.coza	Bela	Chase	Contracts				

## **SELECT TRAINING COURSE**

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

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





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

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- 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 <u>added</u> to this list in the **Configurator**.

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## **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.

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

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## **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.

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• Or export data to Excel, if required.

## **EXPORT TO EXCEL**

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

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- 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.



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## 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.

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Addresses	393 GOR863	Gianna Gordon	gianna.gordon@attexampledomain.coza	Elliott Garcia	Manufacturing	
	394 FRY857	Karter Frye	karter.frye@attexampledomain.coza	Ayla Pittman	Manufacturing	
	395 WIS417	Raya Wise	raya.wise@attexampledomain.coza	Calliope Gilespie	Marketing	
Overtime and	396 RE1756	Frederick Reid	frederick.reid@attexampledomain.coza	Ayla Pittman	Marketing	
lolidays	397 MED651	Charlee Medina	charlee.medina@attexampledomain.coza	Siena Enriquez	Operations	
	398 BOY476	George Boyd	george.boyd@attexampledomain.coza	Ayla Pittman	Operations	
Competence	399 MIL374	Georgia Mills	georgia.mills@attexampledomain.coza	Ayla Pittman	Administration	
Management	+ 400 BAR109 401 VEG815	Alex Barron	alex.barron@attexampledomain.coza	Corbin McConnell Avla Pittman	Administration	
		Anya Vega	anya.vega@attexampledomain.coza		Projects	
Pavrol Data	402 LIN969	Aldan Lindsey	aidan.lindsey@attexampledomain.coza	Tru Tate	Purchasing	
ayroli Data	403 RUI976 404 DEA089	Colette Ruiz Austin Dean	colette.ruiz@attexampledomain.coza austin.dean@attexampledomain.coza	Ayla Pittman Ellott Whitney	Purchasing Quality Assurance	
	405 FL0053	Julianna Flovd	iulianna. flovd @attexampledomain.coza	Avia Pittman	Quality Assurance	
	405 FLOUSS 406 TRE039	Pierce Trevino	pierce.trevino@attexampledomain.coza	Ayla Pittman	Administration	
lanking Details	405 TRE039	Priscila Tate	priscilla.tate@attexampledomain.coza	Ayla Pittman	Safety	
	408 STA369	Dalton Stark	dalton.stark@attexampledomain.coza	Lorelei Houston	Sales	
	409 RIC876	Kamilah Richmond	kamilah.richmond@attexampledomain.coza	Avla Pittman	Sales	
Oustom Details	410 KEL688	Mordechai Kelly	mordechai.kelly@attexampledomain.coza	Emmitt Jensen	Security	
	411 BRY995	Ruby Bryant	ruby.bryant@attexampledomain.coza	Avla Pittman	Security	
	412 CAR677	Jonah Carson	jonah.carson@attexampledomain.coza	Odin Montes	Service Centre	
oans	412 CAR677 413 MOL018	Nalani Molina	nalani.molina@attexampledomain.coza	Avia Pittman	Service Centre	
	414 HOO527	Prince Hood	prince.hood@attexampledomain.coza	Blaise Vincent	Stock Control	
	415 ACE151	Briana Acevedo	briana.acevedo@attexampledomain.coza	Avia Pittman	Stock Control	
Organisation Chart	416 BOO197	Dakari Booker	dakari.booker@attexampledomain.coza	Zavier Patton	Service Centre	
ongunation of the C	417 ENG589	Nataly English	nataly.english@attexampledomain.coza	Avia Pittman	Service Centre	
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# **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.

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- 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.

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	ISTQB	02 Oct 2023	05 Jan 2024	Software Tester	r Unisa	12 Jan 2024	International Diploma	12 Jun 2050	3000	Active	Passed	Next training 2025				
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- 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.
- <u>All</u> other fields are editable you can backspace over or delete existing content, and / or type directly in a field to make any necessary adjustments.



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# SAVE TRAINING COURSE DETAILS

• In this example, the **Expiry Date** has been amended.

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Qualification Expiry													
Cost of training													
Date Training Completed													
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• Click on Save.

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



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## **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.



## **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.



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	825 ROB989	Alanna Robertson	alanna.robertson@attexampledomain.coza	Sofia Simmons	Sales	
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	872 PER713	Alaric Perkins	alaric.perkins@attexampledomain.coza	Sofia Simmons	Sales	
	101 GUE261	Alava Guerrero	alaya.guerrero@attexampledomain.coza	Dulce Nixon	Service Centre	
Overtime and Holidays	300 HEN531	Albert Henson	albert.henson@attexampledomain.coza	Harley Briggs	Quality Assurance	
	19 SIN261	Aleena Singh	aleena.singh@attexampledomain.coza	Elianna Pugh	Human Resources	
	291 WAR246	Aleena Ware	aleena.ware@attexampledomain.coza	Rory Schneider	Marketing	
	400 BAR 109	Alex Barron	alex.barron@attexampledomain.coza	Corbin McConnell	Projects	
	724 COL656	Alexander Coleman	alexander.coleman@attexampledomain.coza	Roman Simpson	Service Centre	
	287 SHE787	Alexandra Sheppard	alexandra.sheppard@attexampledomain.coza	Aislinn Clay	Maintenance	
	643 AGU269	Alexandria Aguirre	alexandria.aguirre@attexampledomain.coza	Timothy Palacios	0	
	559 DAU006	Alexandria Daugherty	alexandria.daugherty@attexampledomain.coza	Violeta Spence	Sales	
	179 HUY032	Alexandria Huynh	alexandria.huynh@attexampledomain.coza	Leslie Miles	Implementations	
Banking Details	181 SAL398	Alexis Salas	alexis.salas@attexampledomain.coza	Leslie Miles	0	
	152 NGU219	Alfred Nguyen	alfred.nguyen@attexampledomain.coza	Dulce Nixon	Service Centre	
	349 BRA879	Alia Branch	alia.branch@attexampledomain.coza	Malaysia Price	Administration	
Custom Details	3 FOX967	Alianna Fox	alianna.fox@attexampledomain.coza	Antonio Gordon	Accounts	
	1011 DRE001	Alice Drew		Eden Rowan	Development	
	869 CAM534	Alisson Camacho	alisson.camacho@attexampledomain.coza	Sofia Simmons	Administration	
	175 ZAM565	Alisson Zamora	alisson.zamora@attexampledomain.coza	Leslie Miles	Engineering	
	239 EST969	Allie Estrada	alie.estrada@attexampledomain.coza	Averi Alvarado	Projects	
	481 CUE036	Allison Cuevas	allison.cuevas@attexampledomain.coza	Bella Chase	Contracts	
	463 BEN946	Allyson Bender	allyson.bender@attexampledomain.coza	Zavier Patton	Service Centre	
	51 DUR589	Alma Duran	alma.duran@attexampledomain.coza	Ansley Skinner	Sales	
	587 JAR933	Alma Jarvis	alma.jarvis@attexampledomain.coza	Lucy Knapp	Development	
	75 DYE318	Alondra Dyer	alondra.dyer@attexampledomain.coza	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**.

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	Acc70866 0	13 Jul 2023	24 Jan 2024	Basic Accounti	Unisa	24 Jan 2024	Accountant	24 Jan 2030	10000	Active	Passed	99 percent marks.				
	IQF6 2	25 Jan 2024	25 Jan 2024	NOF	UNISA	25 Jan 2024	NOF	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**.

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### **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.

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+	NQF6	25 Ja	in 2024	25 Jan 2024	NQF	Unisa	25 Jan 2024	NQF	(	Yes	No		Passed	Training				

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

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Þ	QT I	02 Oct 2023	12 Jan 2024	Business Math	Unisa	12 Jan 2024	Certificate in BMT	Training co	urse deleted	Active	Passed	Next Training July	2024				
	Acc70866	03 Jul 2023	24 Jan 2024	Basic Accounti	Unisa	24 Jan 2024	Accountant			Active	Passed	99 percent marks.					
									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.





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