

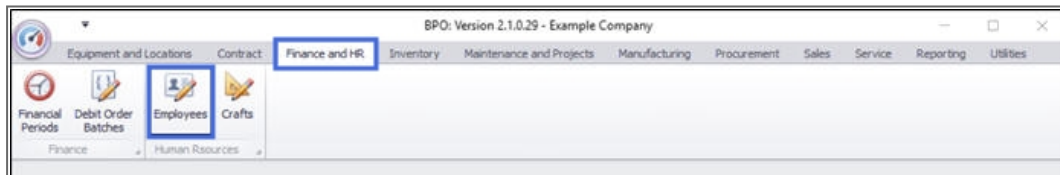
HUMAN RESOURCES

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 and HR > Employees*



The **Employees** listing screen will be displayed.

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.

Employees - BPO: Version 2.1.0.29 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Save Layout Workspaces Reports Excel Refresh

Maintenance Format View Cur...

Links

Enter text to search...

Drag a column header here to group by that column

idEmployeeID	EmployeeNumber	FullName	EmailAddress	Manager
1	DUT001	Susan Du Toit	susan@email.co.za	CO3 Administrator
2	SHA001	Belinda Sharman		Susan Du Toit
3	HAR001	Chris Haynes Attendee		Susan Du Toit
4	BAL001	Susan Cooper	susan@noemail.com	Belinda Sharman
5	You001	Karlen Jessica Young Dun...		
6	RED001	George James Reddy Jef...		Chris Haynes Attendee
7	EMP123	Carolina Suzzetta Louren...		Susan Du Toit
8	TWA001	Jonothan-Mark Twain-Sut...	jona@noemail.co.za	Belinda Sharman
9	STE001	Markus Arilius Stevenson ...	judith.mudzengi@co3.co.za	Jonothan-Mark Twain-Sutton-under-Whitestone
10	JOH001	Michael-Stark Johnson St...	mike@noemail.co.za	Markus Arilius Stevenson Roderhizer Tomljenovi
13	CO3	CO3 Administrator	judith.mudzengi@co3.co.za	
15	TAD009	Theo Peterson	ted@noemail.co.za	Belinda Sharman
17	MUD001	Mark Mudderveld		Susan Du Toit
19	TIM	Joseph Timber		
20	BEN	Ben Johnson		
21	E147282	Jade Rivers		
22	E987654	Jeff Rivers		Jade Rivers
23	XOE001	Joel James	joel@noemail.com	Susan Du Toit
24	MIL001	Sarah Milder		

Addresses

Overtime and Holidays

Competence Management

Payrol Data

Banking Details

Custom Details

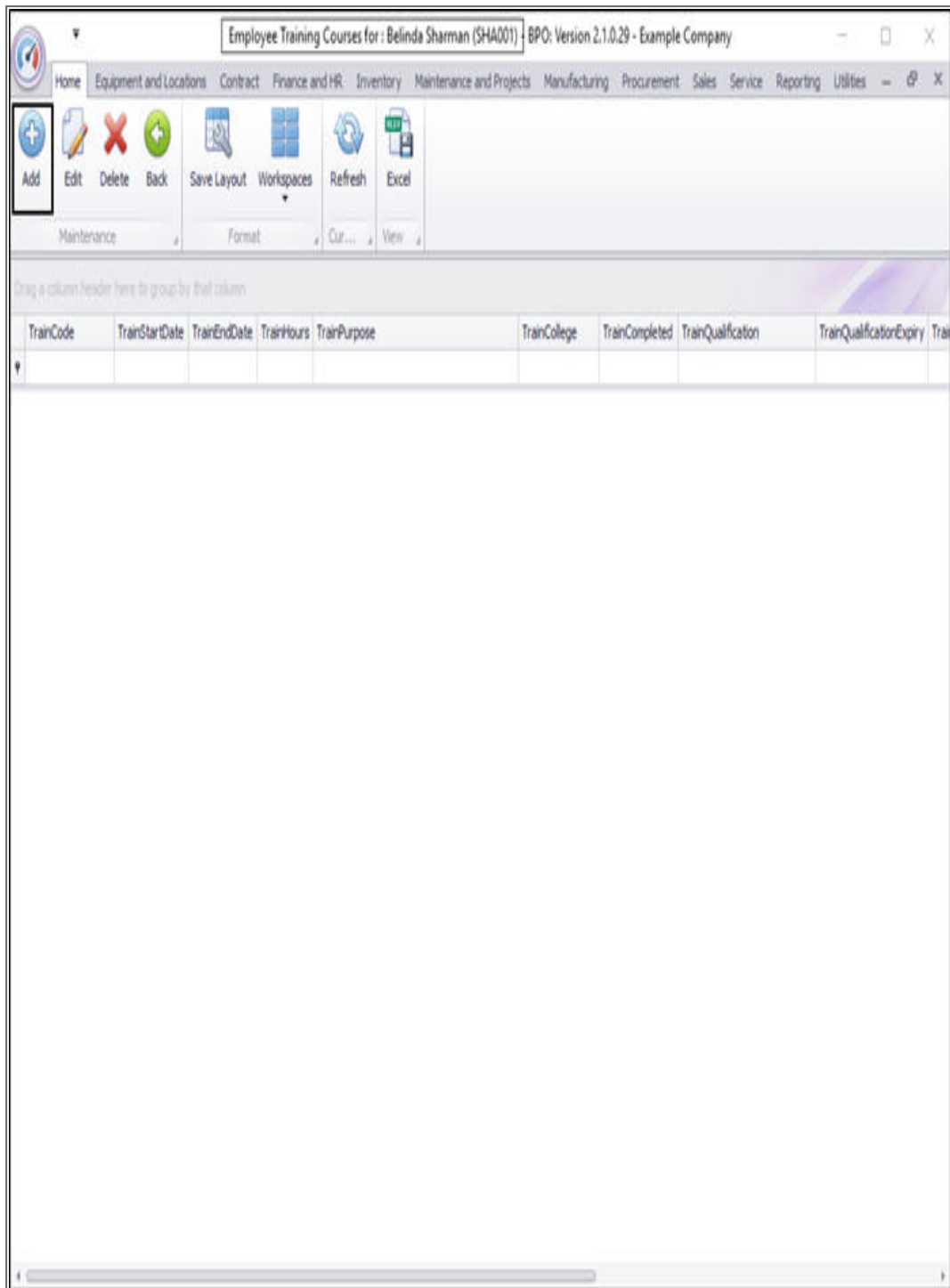
Loans

Organisation Chart

SELECT TRAINING COURSE

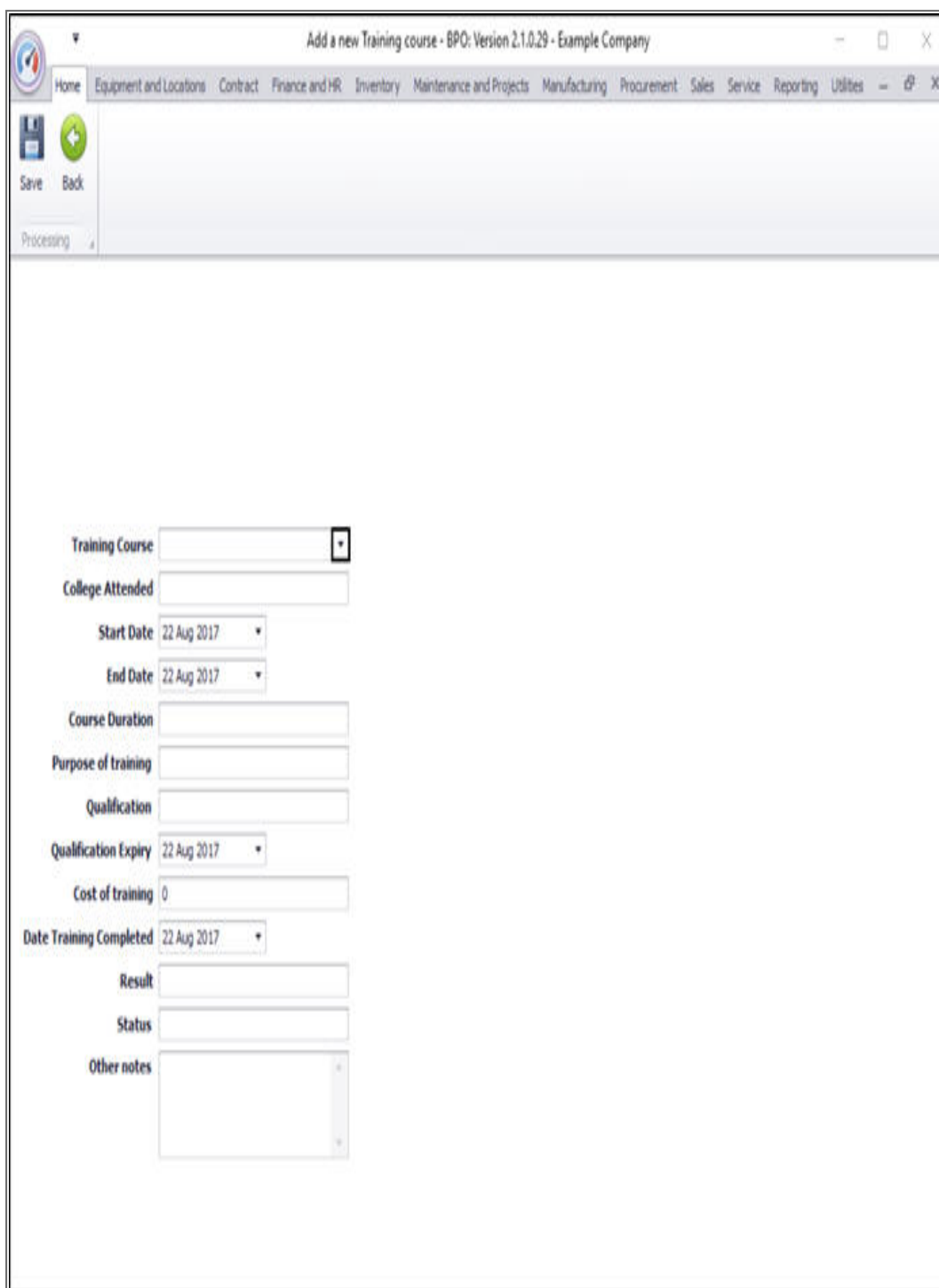
The *Employee Training Courses for : []* screen will open.

- Click on **Add**.



The **Add a new Training course** screen will open

- Click on the **drop-down arrow** in the **Training Course** field.



Add a new Training course - BPO: Version 2.1.0.29 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Processing

Training Course

College Attended

Start Date 22 Aug 2017

End Date 22 Aug 2017

Course Duration

Purpose of training

Qualification

Qualification Expiry 22 Aug 2017

Cost of training 0

Date Training Completed 22 Aug 2017

Result

Status

Other notes

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 ***Health and Safety*** 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 a new Training course - BPO: Version 2.1.0.29 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Processing

Training Course

College Attended

Start Date

End Date

Course Duration

Purpose of training

Qualification

Qualification Expiry

Cost of training

Date Training Completed

Result

Status

Other notes

Type	Description
HS	Health and Safety
IT	IT Courses
PS	Presentation Skills

ADD TRAINING COURSE DETAILS

Fill in the remaining details of the training course:

- **College Attended:** Type in the institution attended to complete 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**.

Add a new Training course - BPO: Version 2.1.0.29 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Processing

Training Course: Health and Safety

College Attended: Durban Hospital

Start Date: 2017/08/07

End Date: 2017/08/10

Course Duration: 3 Days

Purpose of training: Basic First Aid Training

Qualification: Certificate 1 in Basic First Aid

Qualification Expiry: 2018/08/10

Cost of training: 500

Date Training Completed: 2017/08/10

Result: Passed

Status: Active

Other notes: Certificate 2 in Basic First Aid Training to be completed within 6 months of this qualification date.

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

Add a new Training course - BPO: Version 2.1.0.20 - Example Company

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Save Cancel

Processing

Training Course: Health and Safety

College Attended: Hillcrest Hospital

Start Date: 2017/07/03

End Date: 2017/07/05

Course Duration: 3

Purpose of training: Basic First Aid Training

Qualification: Certificate 1 in Basic First Aid

Qualification Expiry: 2017/07/05

Cost of training: 500

Date Training Completed: 2017/07/05

Result: Passed

Status: Active

Other notes: Certificate 2 in Basic First Aid Training to be completed within 3 months.

Training Course has been saved

OK

VIEW ADDED TRAINING COURSE

- You will return to the *Employee Training Courses for: []* screen.
- Here you can now **view** the newly added training course for that employee.
- **Close** the screen when you are done.

Employee Training Courses for : Bianca Du Toit (DUT001) - BPO: Version 2.1.0.20 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Save Layout Workspaces Refresh Excel

Drag a column header here to group by that column

TrainCode	TrainStartDate	TrainEndDate	TrainHours	TrainPurpose	TrainCollege	TrainCompleted	TrainQualifi...	TrainQualifi...	TrainCost	TrainStatus
TT Courses	01 Jan 2015	23 Nov 2016	2	Understand how to use ...	QABooks	2016/11/23	Self Trained	23 Nov 2999	0	Study still i...
Health and Safety	03 Jul 2017	05 Jul 2017	3	Basic First Aid Training	Hilcrest Hospital	2017/07/05	Certificate ...	05 Jul 2017	500	Active

- You will return to the **Employees** listing screen.

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