



EMPLOYEE TRAINING MANAGER GETTING STARTED

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Abstract

This document describes how to get started using Employee Training Manager, a desktop software application that allows you to track your employees or personnel training, events and competencies

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Employee Training Manager

Getting Started Guide – Updated March 2017

Welcome to Employee Training Manager

To utilize the benefits of using Employee Training Manager you will need to create a number of records to get you started. Each new installation of Employee Training Manager includes a small set of sample data, but of course you will want to create your own data to really get a feel for how the software works (see the Getting Started section).

The three core areas of Employee Training Manager are the employees, the courses that the company require their employees to attend and the training classes that record courses that a employee or group of employees have attended.

Employee Training Manager has several modules that are summarised below.

Module Summary

- **Classes** – These are the specific training classes that employees attend for a specified course. You can have many training classes for the same course with different employees attending i.e. you may have a First Aid course and you run a First Aid training class every 3 months. In this example, you have one First Aid course record and four training class records each year.
- **Courses** – These are the courses that you want to train your employees on. A course has several fields that describe the course along with some default fields that are used when creating a training class.
- **Employees** – Employees can attend specific training classes, attain certain competencies, or events. You can record general personal information about an employee as well as employment information such as a job role, department, contact details, qualifications etc.
- **Competencies** – Apart from training courses you may have the need to assess your employees based on competencies. You can create competencies, assign these to employees and determine whether an employee is competent in that function or activity.
- **Events** – If your employees attend seminars or conferences then you can record these event attendances the same way that you record an employee attending a training class. A single employee or a number of employees within your organization can attend an event.
- **Trainers** – Maintain a list of trainers who instruct the training courses. These trainers can be selected from the course or training class modules when creating a new course or training class.
- **Vendors** – Maintain a list of vendors who provide such things as external training or training equipment etc.
- **Reports** – You can run many reports related to Training Classes, Courses, Employees, Competencies, Events, Trainers, Vendors and Users (User reports only apply to the Enterprise edition).
- **Options** – Provides several options to configure Employee Training Manager or perform associated actions such as backing up or restoring your database.

- **Users** – If you have purchased the Enterprise Edition you will be able to create additional users who can login and access a centralized database.

Getting Started

Login to the Software

When you run Employee Training Manager for the first time after the installation, you will be automatically logged in to the database stored on your machine. If you are running the **Professional Edition** there will be no need to login. If you are running the **Enterprise Edition** you can create other users. The administrator account has the following default credentials:

Login Username: ADMIN

Login Password: UpTg201l()\$

Note that all passwords in Employee Training Manager are case-sensitive.

The Enterprise Edition will only require you to login if you have created a user.

Registering your Software

After purchasing your license key you will need to enter it into the software in order to activate it. You do not need to download a new version of the software, you may enter the license key directly into the trial version you are using.

- 1) Select the **Register Software** icon on the main window.
- 2) Enter the license key you received when you purchased the software. To avoid typos, it is best to paste the license key in.
- 3) Click the **Register Software License** button.
- 4) If the license key is valid, the **Register Software** icon will be removed and your software is registered. If the license key is invalid, check that you have entered it correctly.

Entering your Data

When you are using the software, your data may be entered in any order you like. However, when you start using the software for the first time it is useful to enter your data in the order described below.

Step 1 - Selection Types

The selection types are used throughout Employee Training Manager to present you with a list of predefined values to select from when entering data i.e. when entering a course, you are asked where the course default location is, when you click the drop-down box you will be presented with a list of locations that you have previously defined in your location selection types. Employee Training Manager comes with some sample selection types, but feel free to create your own based on your requirements.

You can find the selection types by clicking the **Options** icon on the main window and on the navigation menu you will see the menu item **Selection Types**. Click the **Selection Types** menu item and the list of selection types will appear.

The following selection types can be maintained:

Categories – List of Categories for a course i.e. internal or external

Classifications – List of Classifications for an employee i.e. full-time, part-time, contractor

Contact Types – List of contact types for a contact

Cost Centers – List of cost centers for an employee

Departments – List of Departments that an employee can belong to i.e. accounts, sales

Divisions – List of Divisions that can be assigned to an employee

Ethnic Origins – List of Ethnic origins for an employee i.e. English, African American

Event Types – List of Event types for an event i.e. seminar, conference

Grade Types – List of Grade types for a course or competency i.e. certified, not certified

Job Roles – List of Job Roles for an employee i.e. accountant, engineer

Languages – List of Languages for an employee i.e. English, Spanish

Locations – List of Locations that training classes can take place at i.e. boardroom

Marital Statuses – List of Marital Statuses for an employee i.e. married, single

Mediums – List of Mediums that a course can be presented in i.e. presentation, online

Religions – List of Religions for an employee i.e. Christian, Roman Catholic

Shifts – List of Shifts that an employee can work i.e. day, night, afternoon

Teams – List of Teams that can be assigned to an employee i.e. construction, maintenance

Vendor Types – List of Vendor types for a vendor i.e. training provider

You can add new records into any of the selection types, you can edit descriptions for existing selection types, you can delete selection types (if they are not used), or make a selection type active or inactive.

If you don't have all the information now, you can always enter it at a later stage.

Step 2 - Employees

Now you are ready to enter the list of employees who you want to track training for. Select the **Employees** icon on the main window and then click the Add **Employee** button.

Enter the data for each employee and save. You can edit the employee data later, so if you prefer to create the employees and add the employment data, contact information etc. later then that is fine.

You can import employee data via the Options. You provide the employee data in the format requested and import the employees directly into the database.

Step 3 - Courses

Now you are ready to enter the list of courses that the employees take. Select the **Courses** icon on the main window and then click the Add **Course** button.

Enter the data for each course and save. You can edit the course data later, so if you prefer to create the courses and add other data later then that is fine.

Step 4 - Training Classes

Training Classes are used to record the information about who has or will attend a course and when. You can enter upcoming training classes or training classes that have already taken place. If you have

historical training classes that you would like to enter, you can do that now (or later when you have more time). Future training classes can be entered as and when the information is available. If you know that a training class is scheduled for any date in the future, then as soon as you have this information you can create a training class in Employee Training Manager.

To enter a training class, select the **Classes** icon on the main window and then click the **Add Training Class** button. You will need to enter the course that the training class applies to, when the training class is scheduled, and select which employees are due to attend the training class.