



EMPLOYEE TRAINING MANAGER GETTING STARTED

January 2018

Description

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

Smart Company Software
support@smartcompanysoftware.com

Employee Training Manager

Getting Started Guide

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 an employee or group of employees have attended.






A Course can have one or more Training Classes. An Employee can attend one or more Training Classes.









Enterprise or Professional Edition

If you only require one person to administer the application, you can run the Professional Edition. If you require more than one person to administer the application, you will need to run the Enterprise Edition and store the database on a central server that each client machine can access.

Module Summary

Employee Training Manager has several modules that are summarised below.

Icon	Module	Description
	Dashboard	Displays upcoming training classes and events as well as any currently open records.
	Training Classes	Maintain 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	Maintain the courses that you want to train your employees on. A course has a number of fields that describe the course along with some default fields that are used when creating a training class.
	Employees	Employees are able to attend specific training classes, attain certain competencies, or attend 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	Assess your employees based on competencies. You can add, edit or delete competencies, assign a competency to employees and determine whether an employee is competent in that particular function or activity.

Icon	Module	Description
	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	Run reports for the following modules <ul style="list-style-type: none"> • Training Classes • Courses • Employees • Competencies • Events • Trainers • Vendors • Users (Enterprise edition) <p>You can preview reports on a window within the application, outside of the application or print.</p>
	Options	Provides a number of options to configure the software. You can <ul style="list-style-type: none"> • Update your company information • Add or edit selection types • Backup or restore the database • Create and run SQL queries • Import employees, courses, competencies • Configure database connection location (Enterprise Edition only).
	Users Enterprise Edition Only	Maintain users who can login and access the database. You can also reset passwords or assign permissions to users to restrict access to modules or functions such as view, add, edit and delete.
	About	Displays information about the application such as version number, edition, date release and date licensed.
	Close	Close the application. If you have any records with changes, but not saved, you will be notified of these. Any changes not saved can be discarded or saved from here.

Getting Started

Login to the Software

When you run Employee Training Manager for the first time after the installation, you will automatically be logged in to the application. 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 who are required to enter a username and password to gain access to the application.

The administrator account has the following default credentials:

Login Username: ADMIN

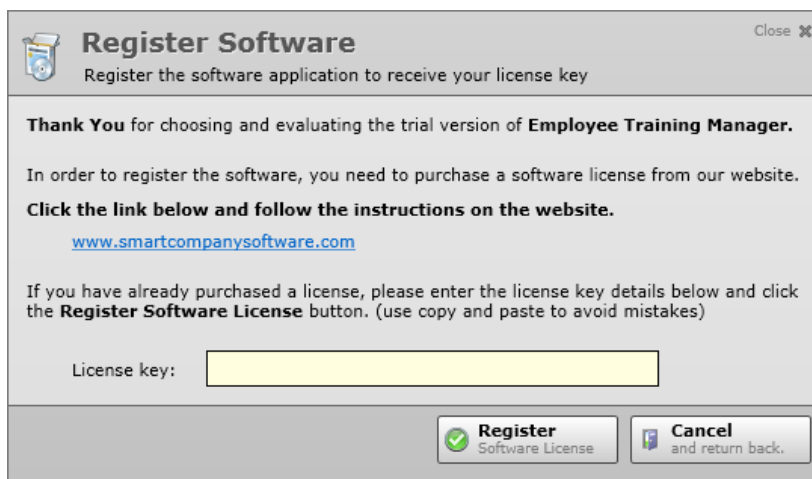
Login Password: UpTg201l()\$


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

When you run the Enterprise Edition, you only need to login if you have created a user, otherwise the application will log you in automatically using the default Admin credentials.

Registering your Software

After purchasing the software, you will be emailed a license key that you need to enter to activate the software. 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, copy the license key from the email and paste it into the application dialog when requested.
- 3) Click the **Register Software License** button.
- 4) If the license key is registered successfully, the **Register Software** icon will be removed and your software is registered. If the license key is unsuccessful, please check you have entered license key 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.

Importing Data

You can import Employee, Course or Competency data. For more information about importing data into Employee Training Manager, please click the link below which will download the documentation directly into your web browser:

[Download - Importing Data into Employee Training Manager](#)

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 creating an employee, you are asked what job role the employee performs. When you click the drop-down box, you will be presented with a list of job roles that have previously been defined. You are free to add, edit or remove any of the selection types. Employee Training Manager does come 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 are available:

Selection Type	Description	Example
Categories	Categories for a course	Internal, External
Classifications	Classifications for an employee	Full-Time, Contractor
Contact Types	Contact types for a contact	Spouse
Cost Centers	Cost centers for an employee	A001
Departments	Departments that an employee can belong to	Accounts, Sales
Divisions	Divisions that an employee can belong to	New York, London
Ethnic Origins	Ethnic origins for an employee	British, African American
Event Types	Event types for an event	Seminar, Conference
Grade Types	Grade types for a course or competency	Certified, Not Certified
Job Roles	Job Roles for an employee	Accountant, Engineer
Languages	Languages for an employee	English, Spanish
Locations	Locations where training classes can take place	Boardroom, Room 1
Marital Statuses	Marital Statuses for an employee	Married, Divorced
Mediums	Mediums that a course can be presented in	Presentation, Online
Religions	Religions for an employee	Christian, Hindi
Shifts	Shifts that an employee can work	Day, Night
Teams	Teams that can be assigned to an employee	Team A, Team B
Vendor Types	Vendor types for a vendor	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.

You can update the selection types at any point, so if you don't have all the information now, you can enter it at a later date.

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.

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

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.