

# Simply Personnel Training Manager

## Scheduling a Training Course & Course Maintenance

## **Simply Training: Diarising a training course and course maintenance.**

This document provides step-by-step guide for users to give an easy understanding on how to diarise a training course and maintaining the information.

If at any time you need help or just need some questions answered please use our on-line helpdesk at [www.simplypersonnel.co.uk](http://www.simplypersonnel.co.uk) where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

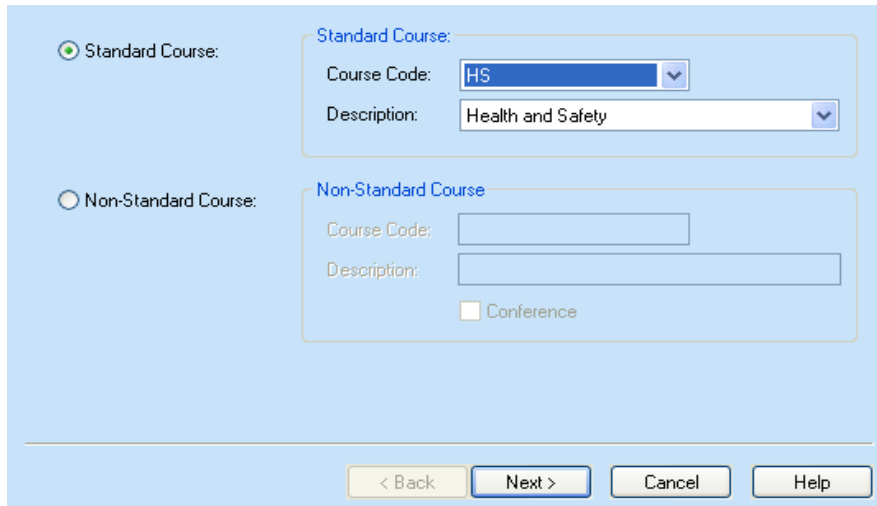
To diarise a training course, you will need to access the training manager:

 **Training Manager**  
Complete training management

And then from the main dashboard select schedule a training course:

 **Schedule Training Course**  
Schedule a new training course

This will open up a new window, you have the option to select a standard course (set up in the system set up) or you can type in a non standard course.



Standard Course:

Standard Course:

Course Code:

Description:

Non-Standard Course:

Non-Standard Course

Course Code:

Description:

Conference


< Back   Next >   Cancel   Help

Select the course from the drop down list and click on next. This will take you to another window.

<b>Details:</b> Start Date: <input type="text" value="18/05/2009"/> ... Duration: <input type="text" value="1"/> ... End Date: <input type="text" value="18/05/2009"/> ... Trainer Name: <input type="text" value="Alan Jones"/> Provider Name: <input type="text"/> Expiry Date: <input type="text"/> ... Status: <input type="text" value="Scheduled"/>		<b>Location:</b> <input type="text"/> Administration: <input type="radio"/> External <input checked="" type="radio"/> Internal Maximum Places: <input type="text" value="4"/> Minimum Places: <input type="text" value="0"/> CPD Hours: <input type="text" value="0:00"/> <input checked="" type="checkbox"/> CPD Accredited
<input type="button" value=" &lt; Back"/> <input type="button" value=" Finish"/> <input type="button" value=" Cancel"/> <input type="button" value=" Help"/>		

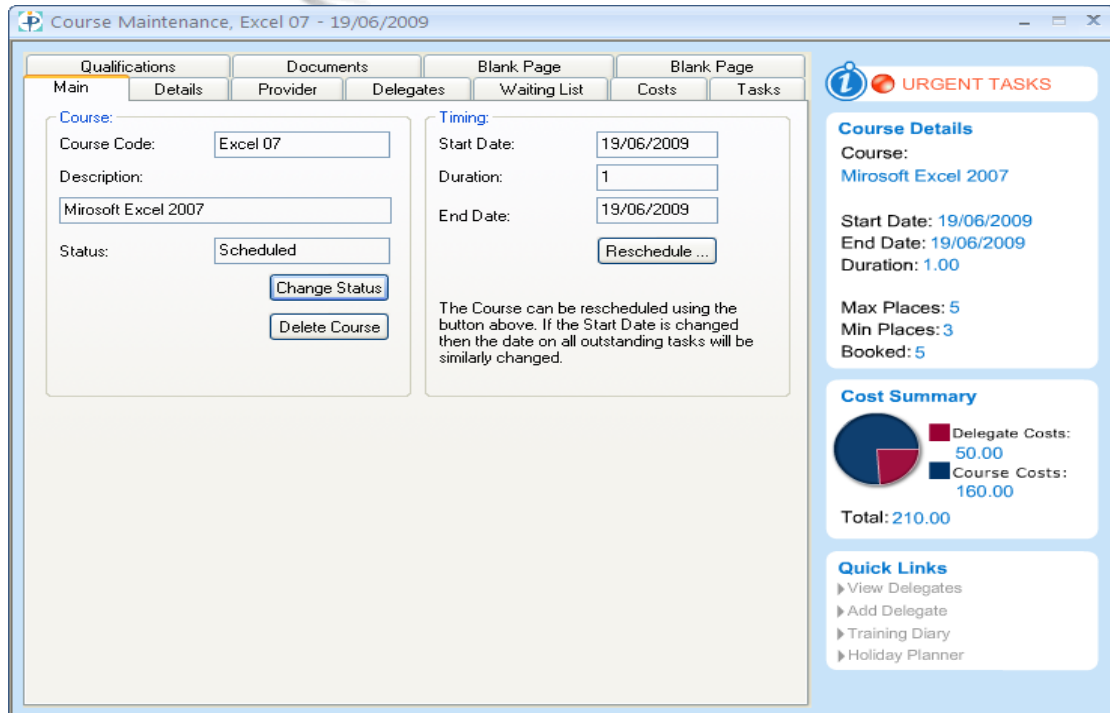
Enter in your start date (if you have set up the duration and training name in the set up, then this will automatically enter the details). Enter the location and state the maximum and minimum number of places. You can also credit CPD hours.

**Simply Personnel** ✕

 Course has been diarised successfully, do you wish to enter additional details for this course?

Once you have entered this information click on Finish. You will then be prompted the window above.

If you select Yes you will be taken to the Course maintenance section.



The screenshot shows the 'Course Maintenance' window for 'Excel 07' on 19/06/2009. The interface includes a navigation menu with tabs for 'Qualifications', 'Documents', 'Blank Page', and another 'Blank Page'. Below this are sub-tabs: 'Main', 'Details', 'Provider', 'Delegates', 'Waiting List', 'Costs', and 'Tasks'. The 'Main' tab is active, displaying course details and timing information.

**Course Details:**  
 Course Code: Excel 07  
 Description: Microsoft Excel 2007  
 Status: Scheduled  
 Buttons: Change Status, Delete Course

**Timing:**  
 Start Date: 19/06/2009  
 Duration: 1  
 End Date: 19/06/2009  
 Button: Reschedule ...

**Urgent Tasks:**  
 Course Details: Course: Microsoft Excel 2007  
 Start Date: 19/06/2009  
 End Date: 19/06/2009  
 Duration: 1.00  
 Max Places: 5  
 Min Places: 3  
 Booked: 5

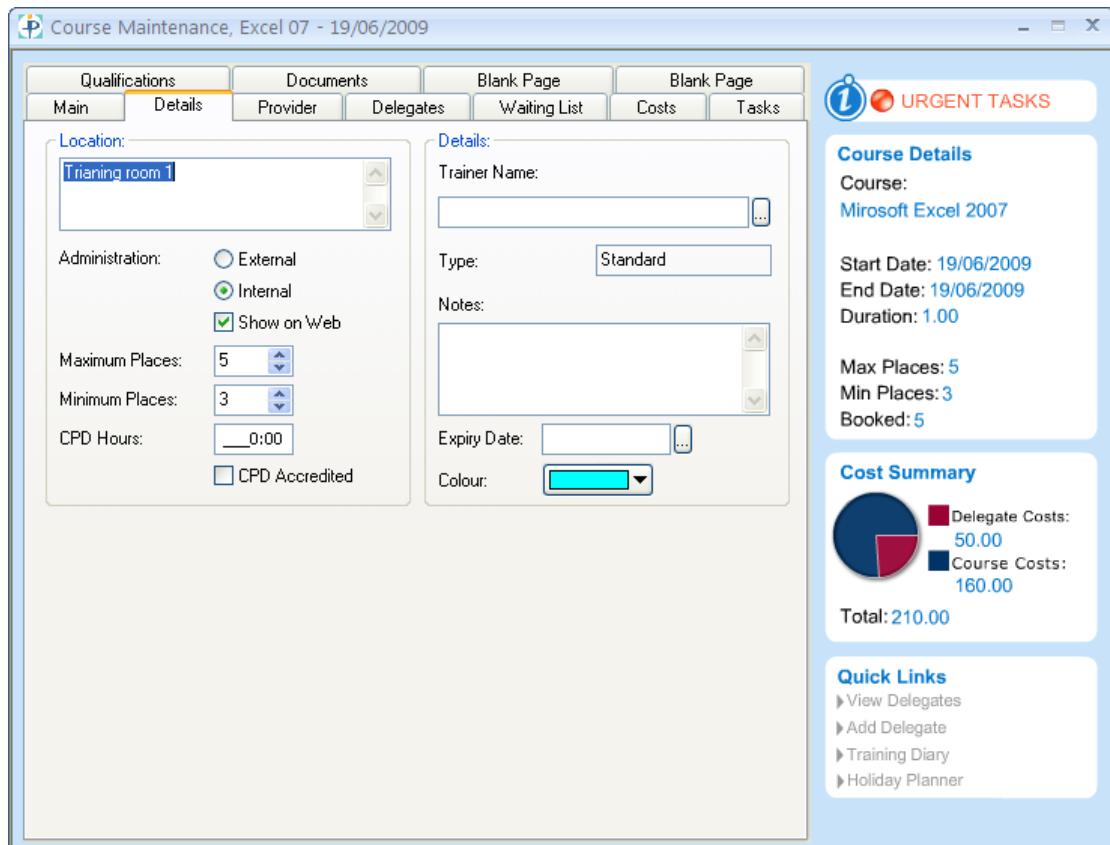
**Cost Summary:**  
 Delegate Costs: 50.00  
 Course Costs: 160.00  
 Total: 210.00

**Quick Links:**  
 View Delegates  
 Add Delegate  
 Training Diary  
 Holiday Planner

**Text:**  
 The Course can be rescheduled using the button above. If the Start Date is changed then the date on all outstanding tasks will be similarly changed.

That main page will show the initial information that you entered when diarising the course but this is where you can re-schedule the date and also change the status to scheduled, completed or cancelled.

The detail page will also show information that you may have already entered.



The screenshot shows the 'Course Maintenance' window for 'Excel 07' on 19/06/2009, with the 'Details' tab selected. The interface includes the same navigation menu as the previous screenshot.

**Location:**  
 Training room 1

**Administration:**  
 External (radio button)  
 Internal (radio button, selected)  
 Show on Web (checkbox, checked)

**Maximum Places:** 5  
**Minimum Places:** 3  
**CPD Hours:** 0:00  
 CPD Accredited (checkbox, unchecked)

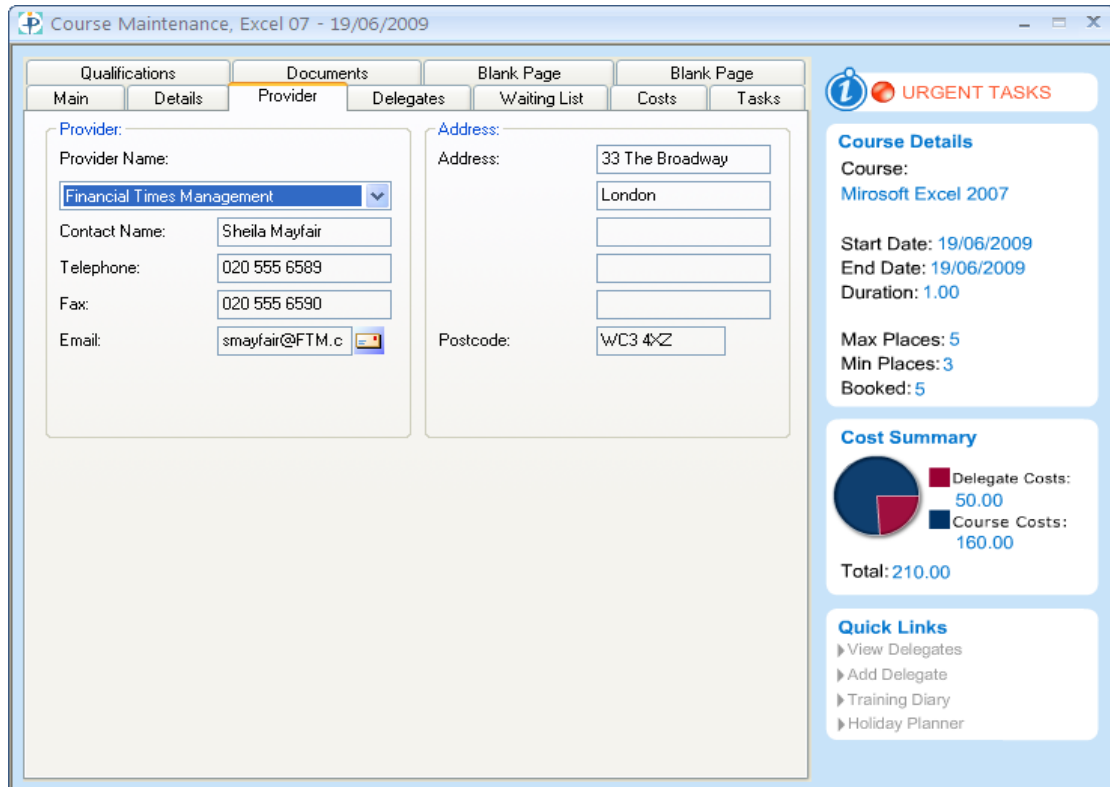
**Details:**  
 Trainer Name: [Empty field]  
 Type: Standard  
 Notes: [Empty text area]  
 Expiry Date: [Empty field]  
 Colour: [Blue dropdown menu]

**Urgent Tasks:**  
 Course Details: Course: Microsoft Excel 2007  
 Start Date: 19/06/2009  
 End Date: 19/06/2009  
 Duration: 1.00  
 Max Places: 5  
 Min Places: 3  
 Booked: 5

**Cost Summary:**  
 Delegate Costs: 50.00  
 Course Costs: 160.00  
 Total: 210.00

**Quick Links:**  
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 Add Delegate  
 Training Diary  
 Holiday Planner

The provider page will have all of the contact information.



The screenshot shows the 'Provider' page for 'Financial Times Management'. The page includes contact details such as name, telephone, fax, and email, as well as an address and postcode. A sidebar on the right contains course details, a cost summary pie chart, and quick links.

Field	Value
Provider Name	Financial Times Management
Contact Name	Sheila Mayfair
Telephone	020 555 6589
Fax	020 555 6590
Email	smayfair@FTM.c
Address	33 The Broadway London
Postcode	WC3 4XZ

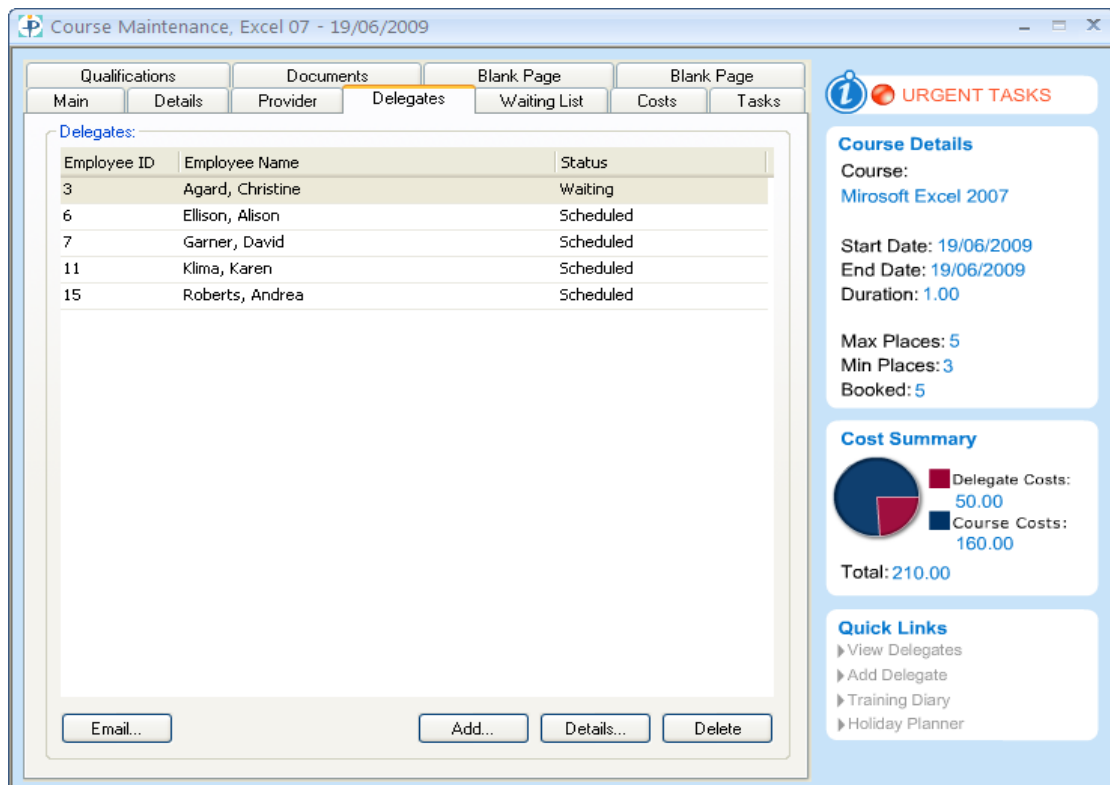
**Course Details**  
 Course: Mirosoft Excel 2007  
 Start Date: 19/06/2009  
 End Date: 19/06/2009  
 Duration: 1.00  
 Max Places: 5  
 Min Places: 3  
 Booked: 5

**Cost Summary**

Category	Cost
Delegate Costs	50.00
Course Costs	160.00
<b>Total</b>	<b>210.00</b>

**Quick Links**  
 View Delegates  
 Add Delegate  
 Training Diary  
 Holiday Planner

The delegate page is where you can add and also keep a list of your delegates that are book for the training course, click on **Add** to select the delegates.



The screenshot shows the 'Delegates' page for the same course. It displays a table of delegates with their employee IDs, names, and statuses. The sidebar on the right is identical to the provider page.

Employee ID	Employee Name	Status
3	Agard, Christine	Waiting
6	Ellison, Alison	Scheduled
7	Garner, David	Scheduled
11	Klima, Karen	Scheduled
15	Roberts, Andrea	Scheduled

**Course Details**  
 Course: Mirosoft Excel 2007  
 Start Date: 19/06/2009  
 End Date: 19/06/2009  
 Duration: 1.00  
 Max Places: 5  
 Min Places: 3  
 Booked: 5

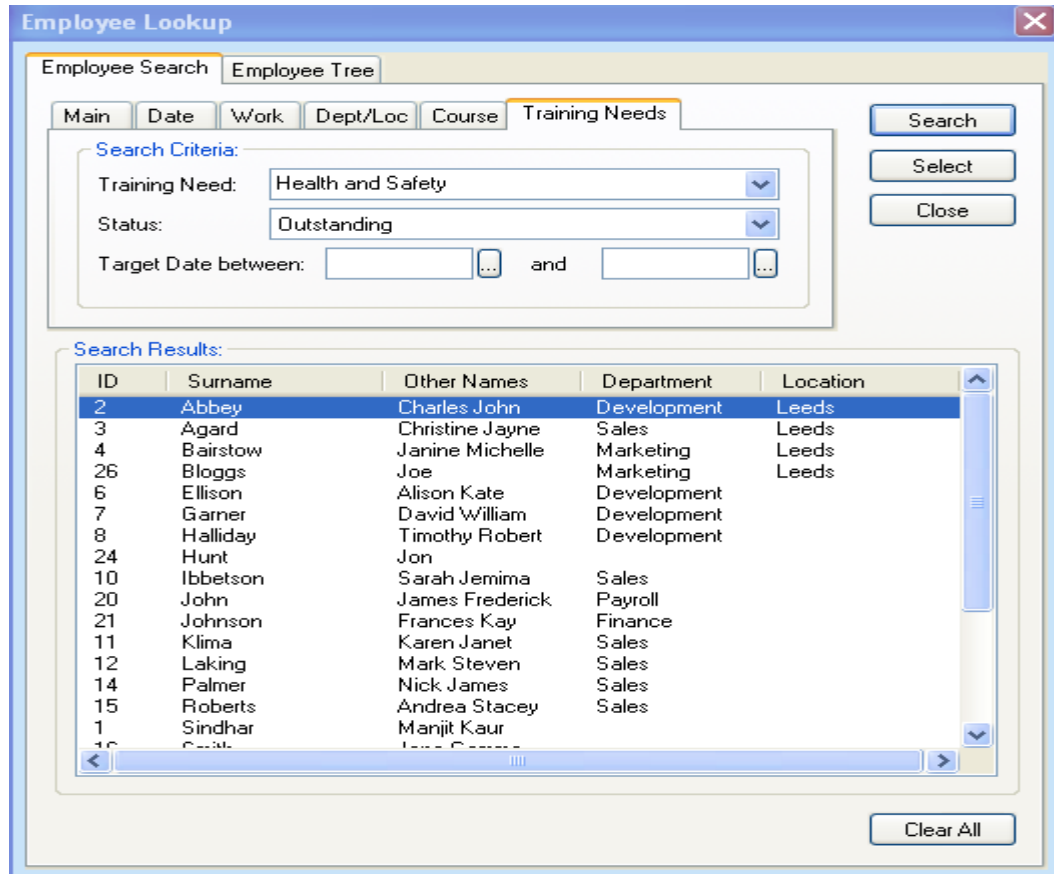
**Cost Summary**

Category	Cost
Delegate Costs	50.00
Course Costs	160.00
<b>Total</b>	<b>210.00</b>

**Quick Links**  
 View Delegates  
 Add Delegate  
 Training Diary  
 Holiday Planner

Buttons at the bottom: Email..., Add..., Details..., Delete

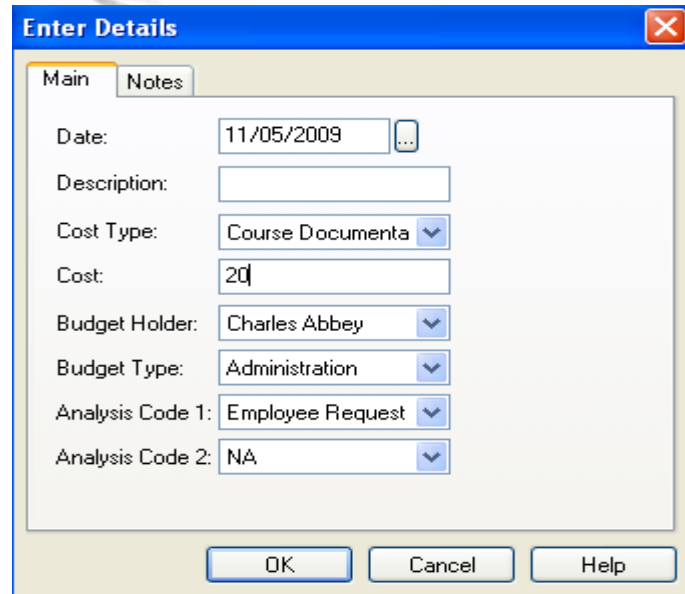
When you click on add.. the employee lookup window will open up, you can then select your employee/ delegates. An option you may search by delegate is via the outstanding training needs.



You can also do the same process via Manage Delegates from the main dashboard.



The next tab COSTS will keep track of all costs related to a specific training course, click on add.. and a new window will appear.



**Enter Details**

Main Notes

Date: 11/05/2009

Description:

Cost Type: Course Documenta

Cost: 20

Budget Holder: Charles Abbey

Budget Type: Administration

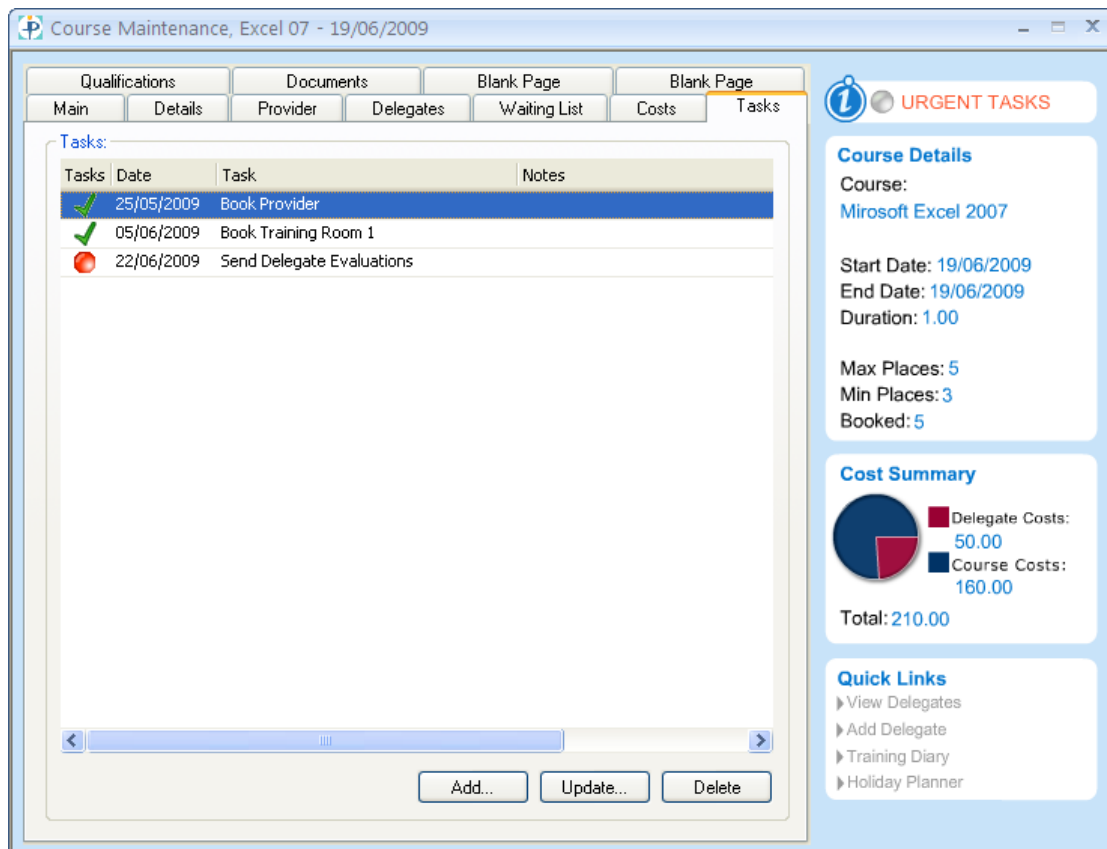
Analysis Code 1: Employee Request

Analysis Code 2: NA

OK Cancel Help

Enter the cost and what it relates to. You can also link this to the budget.

The task will show you a list of all course level tasks linked to the training course (done via system set up) or you can also add new ones by clicking add at the bottom of the window.



Course Maintenance, Excel 07 - 19/06/2009

Qualifications Documents Blank Page Blank Page

Main Details Provider Delegates Waiting List Costs Tasks

**Tasks:**

Tasks	Date	Task	Notes
✓	25/05/2009	Book Provider	
✓	05/06/2009	Book Training Room 1	
●	22/06/2009	Send Delegate Evaluations	

Add... Update... Delete

**URGENT TASKS**

**Course Details**  
Course: Microsoft Excel 2007  
Start Date: 19/06/2009  
End Date: 19/06/2009  
Duration: 1.00  
Max Places: 5  
Min Places: 3  
Booked: 5


**Cost Summary**

Delegate Costs:	50.00
Course Costs:	160.00
<b>Total:</b>	<b>210.00</b>

**Quick Links**

- View Delegates
- Add Delegate
- Training Diary
- Holiday Planner

These tasks will also be shown along with the task relating to other courses in the task list shown at the top of you dash board.



**Task Summary**

- 28 URGENT TASKS
- 0 UPCOMING TASKS
- 53 FUTURE TASKS

Click [here](#) to review and action

You can link Qualification to the training course. To do this, select from the drop down menus (generated in system setup).

**Qualification Details**
✕

**Details:**

Qualification:  ▼

Subject:  ▼

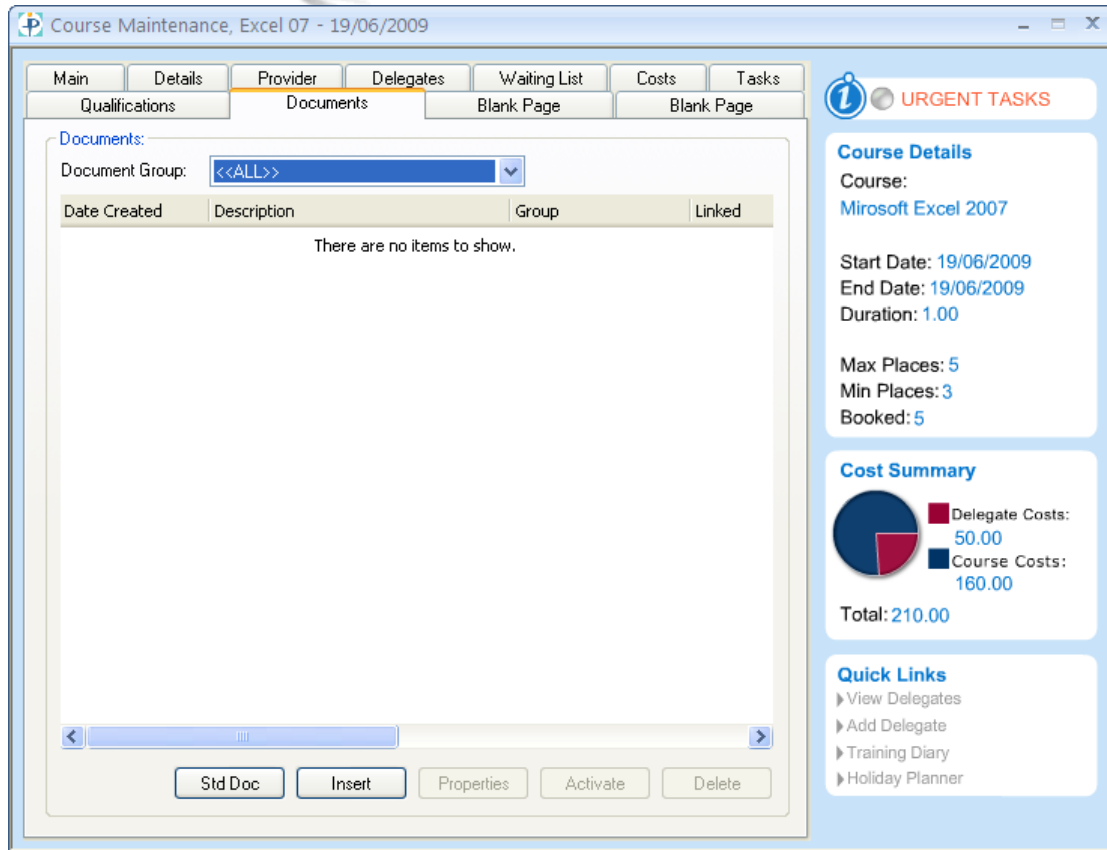
Grade:  ▼

Establishment:

Notes:

Expires In:   ▼

There is also a documents page where you can insert document relating to the training course, you can also send out standard document from you templates. And there are blank pages so you can use the screen designer to develop a screen with information that has not been captured by the other training manager tabs.



Course Maintenance, Excel 07 - 19/06/2009

Main Details Provider Delegates Waiting List Costs Tasks

Qualifications Documents Blank Page Blank Page

Documents:

Document Group: <<ALL>>


Date Created	Description	Group	Linked
There are no items to show.			

Std Doc Insert Properties Activate Delete

**URGENT TASKS**

**Course Details**  
Course: Microsoft Excel 2007  
Start Date: 19/06/2009  
End Date: 19/06/2009  
Duration: 1.00  
Max Places: 5  
Min Places: 3  
Booked: 5

**Cost Summary**



Delegate Costs: 50.00  
Course Costs: 160.00  
Total: 210.00

**Quick Links**

- ▶ View Delegates
- ▶ Add Delegate
- ▶ Training Diary
- ▶ Holiday Planner

Over on the left hand side of the course maintenance there is a summary, You can quickly go to the task list from here, view and add delegate and review the holiday planner.



**URGENT TASKS**

**Course Details**  
Course: Microsoft Excel 2007  
Start Date: 19/06/2009  
End Date: 19/06/2009  
Duration: 1.00  
Max Places: 5  
Min Places: 3  
Booked: 5

**Cost Summary**



Delegate Costs: 50.00  
Course Costs: 160.00  
Total: 210.00

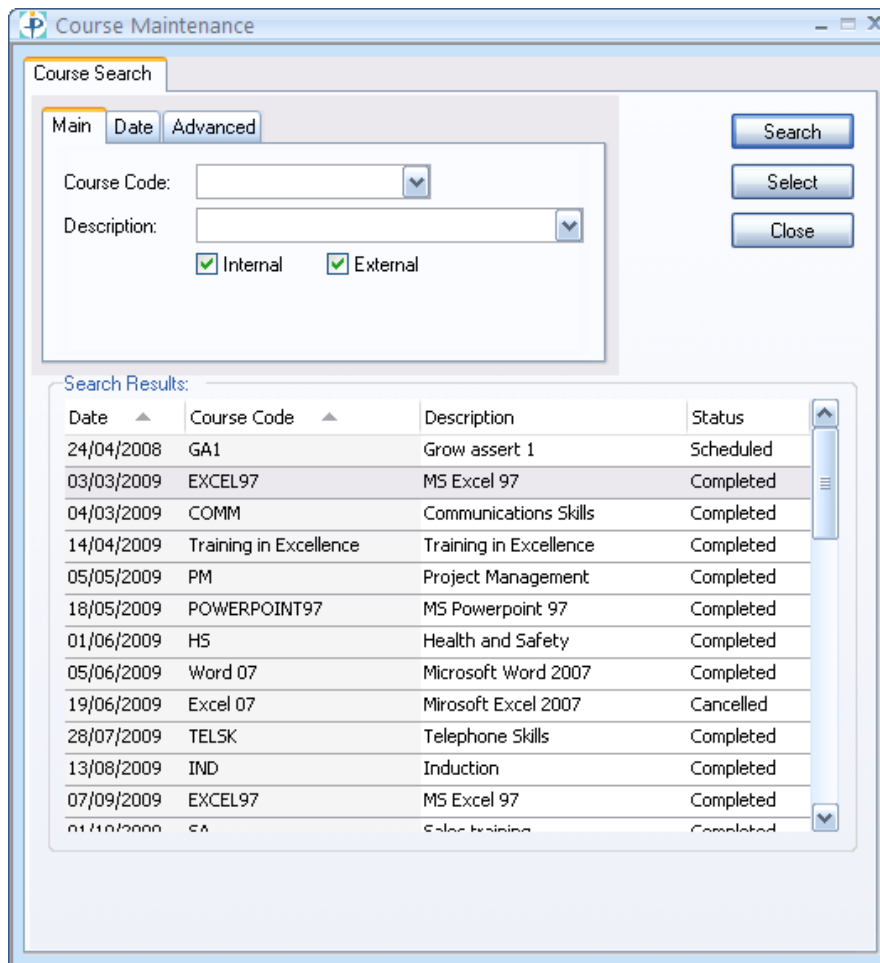
**Quick Links**

- ▶ View Delegates
- ▶ Add Delegate
- ▶ Training Diary
- ▶ Holiday Planner

All of your courses are accessible via the course maintenance tab situated on the main dashboard.



This will open up a new window where you can search for the course needed.



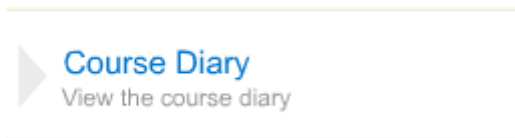
The screenshot shows a window titled "Course Maintenance" with a "Course Search" tab. It features three tabs: "Main", "Date", and "Advanced". The "Main" tab is active and contains the following search criteria:

- Course Code: [Dropdown menu]
- Description: [Dropdown menu]
- Internal  External

Buttons for "Search", "Select", and "Close" are located on the right side of the search area. Below the search filters is a "Search Results:" section containing a table with the following data:

Date	Course Code	Description	Status
24/04/2008	GA1	Grow assert 1	Scheduled
03/03/2009	EXCEL97	MS Excel 97	Completed
04/03/2009	COMM	Communications Skills	Completed
14/04/2009	Training in Excellence	Training in Excellence	Completed
05/05/2009	PM	Project Management	Completed
18/05/2009	POWERPOINT97	MS Powerpoint 97	Completed
01/06/2009	H5	Health and Safety	Completed
05/06/2009	Word 07	Microsoft Word 2007	Completed
19/06/2009	Excel 07	Mirosoft Excel 2007	Cancelled
28/07/2009	TELSK	Telephone Skills	Completed
13/08/2009	IND	Induction	Completed
07/09/2009	EXCEL97	MS Excel 97	Completed
01/10/2009	SA	Sales training	Completed

You can also view the course diary, this will show all of the diarised training courses.



You can print this screen off, choose the dates you wish to look at and also filter via department and location.

Course Diary

Show Course: Course Code: <<ALL>> Description: <<ALL>>

Show Courses Within Date Range: Start Date: 01/01/2009 End Date: 31/12/2009

Go to Date: 11/05/2009

View Details Print Options... Print Preview

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday
27/4 - 3/5	27 Apr	28	29	30	1 May	2
			FAID; First Aid	HS; Health and Safety		3
4 - 10/5	4	5	6	7	8	9
						10
11 - 17/5	11	12	13	14	15	16
						17
18 - 24/5	18	19	20	21	22	23
	HS; Health and Safety , Lo					24
25 - 31/5	25	26	27	28	29	30
						31