

Simply Personnel Training Manager

Setting Up Your System

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This document provides step-by-step guide for administrators to give an easy understanding on set up your training manager.

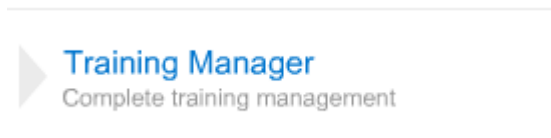
If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

System Setup

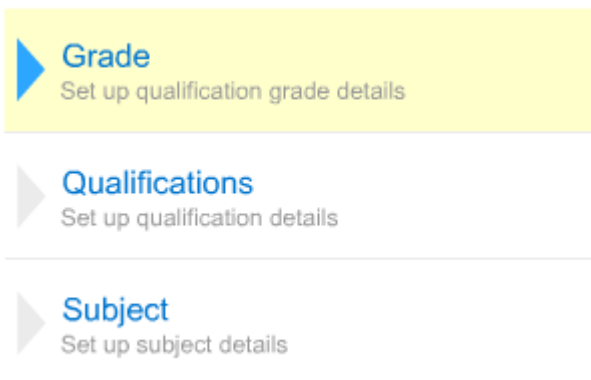
To access your training manager select the icon from the main dashboard



Then select the system setup



A further dashboard will open up. Firstly you will need to set up the grades, and qualification that can be awarded to employees when they pass a training course. Click on the qualification tab to open up a further dashboard.



Grade: click on the add button to add all the grades in, i.e. pass, merit, A,B,C

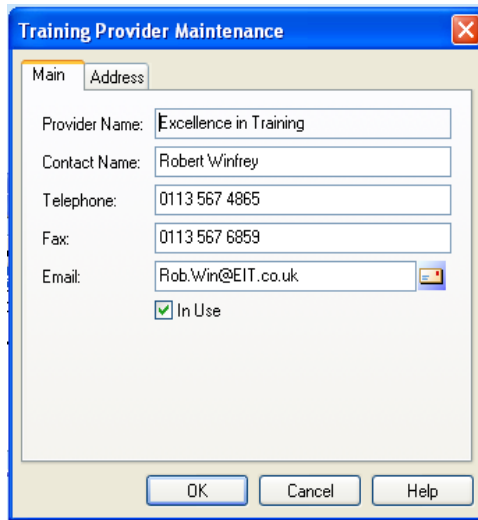
Qualification: click on add to add all the qualifications, i.e. NVQ

Subject: click on add to add all the subjects i.e. first aid

Training Provider.



This is where you can add all of your different training providers details



The screenshot shows a dialog box titled "Training Provider Maintenance" with a close button (X) in the top right corner. It has two tabs: "Main" (selected) and "Address". The "Main" tab contains the following fields:

- Provider Name: Excellence in Training
- Contact Name: Robert Winfrey
- Telephone: 0113 567 4865
- Fax: 0113 567 6859
- Email: Rob.Win@EIT.co.uk
- In Use

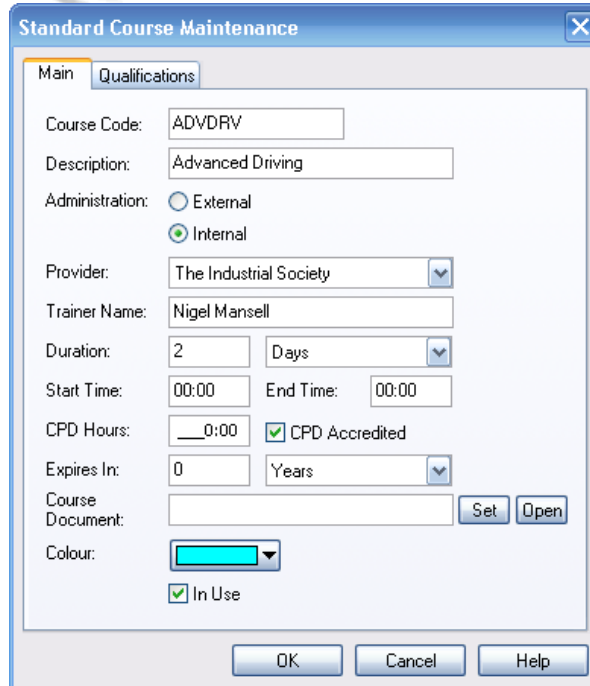
At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Help".

Click on add and fill in the fields.

Courses



Click on courses to input details of all of the training courses you run or provide to your employees.



Click on add and the window shown above will appear, enter the details and add any qualification that are awarded when completing this course.

Tasks

Course Level Tasks

Define automatic tasks for courses

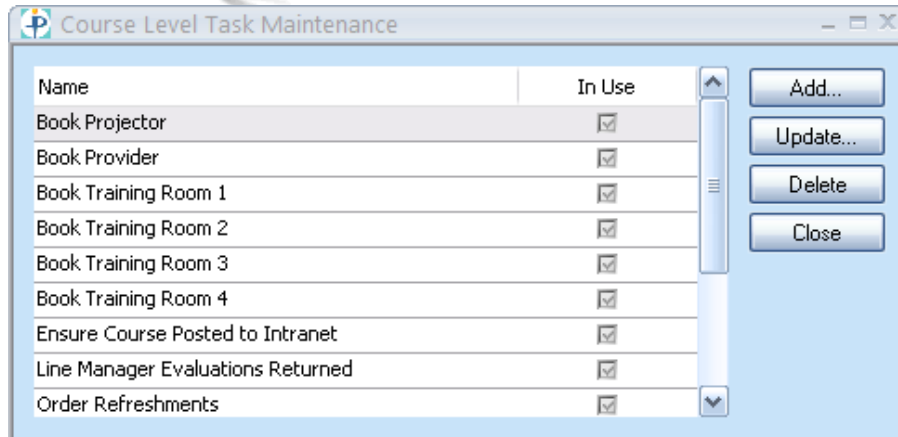
Delegate Level Tasks

Define automatic tasks for delegates

Standard Task

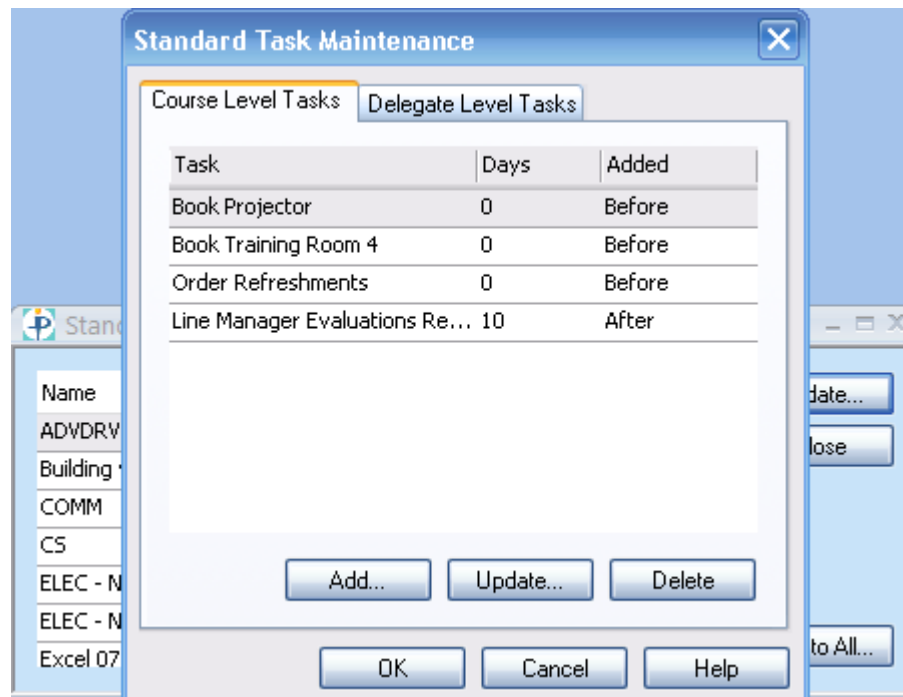
Set up which course have automatic tasks

Course Level Tasks: this is where you add what types of tasks you need to be reminded of, i.e. book a training room, send out course invites. Click on add and fill in the field.

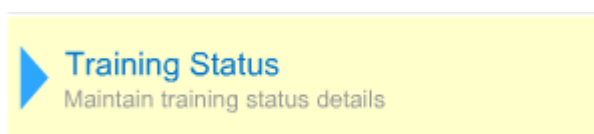


Delegate Level Tasks: this is where you add tasks that are related to the delegate i.e. you may need to make sure that they wear suitable clothing, to add complete the same process as you did when adding course level tasks.

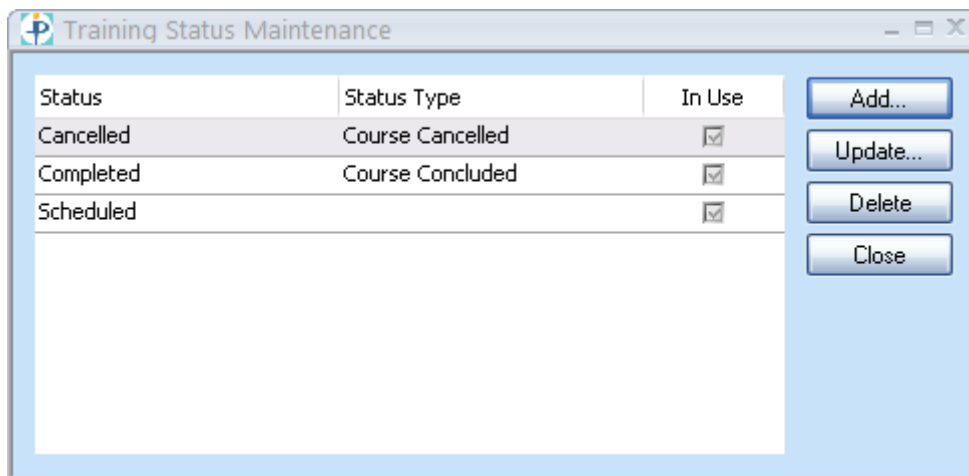
Standard Tasks: this is where you add the task that you have created above to a course and you can state how many days before or after you want these to show in your task list.



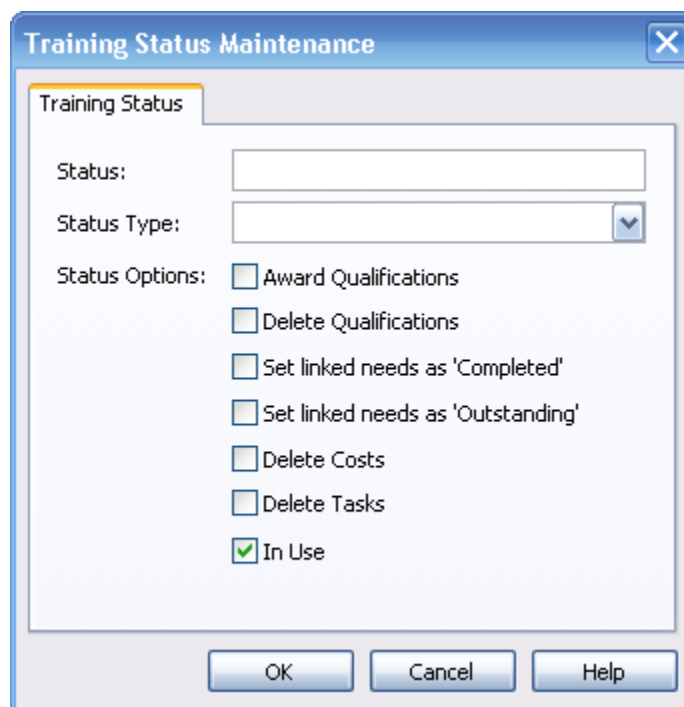
Training Status



Click on this to open up the next window



There are three options but you can add more if needed, this will state that if a course is cancelled it will not award any qualification and delete costs



You can select the option you require.