

**Contents**

- Training Plan ..... 2
  - Purpose ..... 2
- Clean Up ..... 3
  - Course Code Master Report..... 3
  - Making changes to Course Code Table ..... 4
    - Changing a Course Name ..... 4
    - Changing a Course Code or Merging Codes..... 5
    - Changing Multiple Codes with the Same Course Name ..... 6
    - Inactivating a Course Code ..... 6
- Course Code Master ..... 7
  - Course Code Master ..... 8
- Building Training Plans ..... 9
  - By Position ..... 9
  - By Employee..... 11
- Entering Continuing Education Records ..... 12
  - Mass Update ..... 12
  - Individual Records..... 13
- Reporting ..... 14
  - Continuing Education Report..... 14
  - Required Courses ..... 14
  - Training Matrix Report..... 14
  - Training Plan Report ..... 15

## Training Plan

### Purpose

Employee training is an important part of our organizational effectiveness. With changes to government regulations, reliable tracking of training is paramount to remaining compliant with our regulatory bodies. For Human Resources Professionals, ensuring that all of our employees have completed their required training can be a difficult task, and producing accurate reports can sometimes seem impossible. info:HR has a built-in solution to respond to this challenge.

Training Plans can be created in info:HR by position, enabling tracking of required courses for the position and renewal dates associated with the training. Also, we are able add courses to an employee's individual training plan.

When a training course that requires a renewal has been completed and entered into info:HR, the system will generate a new renewal date and create a follow-up record for the next completion date.

With the document attachment feature we remove the need to search files for supporting documentation, providing the ability to further a paperless goal.

For the purposes of this document we will be going through the steps to set up a training plan for a position, HR Generalist, and adding some additional courses to an individual's training plan, Janice Browning. We will also be exploring reporting capabilities and the steps to accurately enter training records into info:HR.

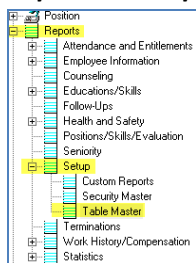
## Clean Up

Before beginning the process of setting up Training Plans it is always a good practice to clean up your course code data. This allows you the opportunity to ensure the codes in the system are valid and there are no duplication of courses.

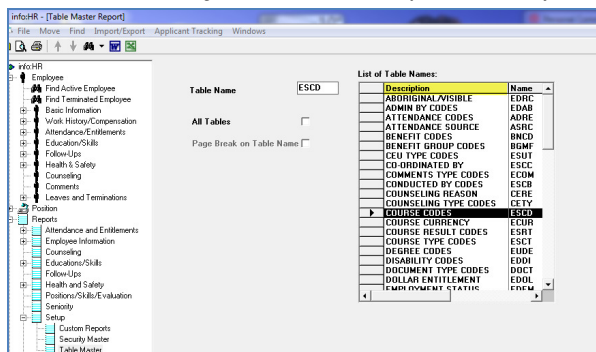
## Course Code Master Report

1. Begin by running a **Course Code Master Report**.
2. Select:

**Reports** ▶ **Setup** ▶ **Table Master**



3. To sort the **List of Table Names** alphabetically click on the **Description** title bar (Description).



4. Select the **Course Code** table.
5. Click the **View** (🔍) button to view the report or the **Print** (🖨) button to send the report directly to the printer.

Date	Time	Page		
2/25/14	2:04:54 PM	1		
HR Systems Strategies Inc.				
TableMaster Report		RZTABLE		
Table	Table Name	Code	Description	Incentive
ESCD	COURSE CODES	AODA	Access	
		AI	Advanced INFO:HR	
		B	Budget for the Year	
		ORI	Company Orientation	
		CPR	CPR	
		HT	Hirez/Termination Procedures	
		IB	International Banking	
		INFO	Intro to INFO:HR	
		ME	Month End Procedures	
		PIP	PIPEDA Legislation	
		PA	Preparation of Annual Report	
		TEST	test	
		TY	Typing	
		ES	Using INFO:HR Self-Serve	
		YE	Year End Procedures	
		ZZZ	zzzz	
		ZZZ1	zzz	

6. From the code list determine what codes require action. Some of the options for clean-up are changing the course name, merging codes together, changing the course code or deleting the course code. (**Note: Course Codes should not be deleted prior to running a Continuing Education Report using the Course Code in the selection criteria. If the course is still in use,**

***“Inactive” the Course Code instead of deleting the record. By inactivating a record, the Course Code will show in Red in the Course Code lookup screen.***

## Making Changes to Course Code Table

### Changing a Course Name

There are two methods of changing Course Names. Below is the easiest method to accomplish this task. The other method is to use the Table Master under the Setup menu.

1. Open the Course Code Table.  
**Reports** ➤ **Education/Skills** ➤ **Continuing Education**
2. Click on the **Course Code Magnify Glass** (🔍).

Code	Description	Course Type
ABCL101	ABC of Learning 101	PD
CPR	CPR	
EEO	EEO Reporting	PD
EXCEL	Excel Review	ADMN
PER	GLOBAL STAFFING	
HRP	HR Practices	
JERRY	Jerry's Course on Retirement	PD
TS	Let's Get Starlec	ADMN
WMIN	WNMIS	HS

Course Type:

Inactive Code:

Buttons: Select, Close, Edit, OK, Cancel, New, Delete, Print

3. Select the Course Code that will be renamed and click **Edit** (Edit).
4. Enter the desired new Course Name. Click **OK** (OK).


Code	Description	Course Type
ABCL101	ABC of Learning 101	PD
WMIN	Accessibility Disabilities Act	HS
CPR	CPR	
EEO	EEO Reporting	PD
EXCEL	Excel Review	ADMN
PER	GLOBAL STAFFING	
HRP	HR Practices	
JERRY	Jerry's Course on Retirement	PD
TS	Let's Get Starlec	ADMN
WMIN	WNMIS	HS

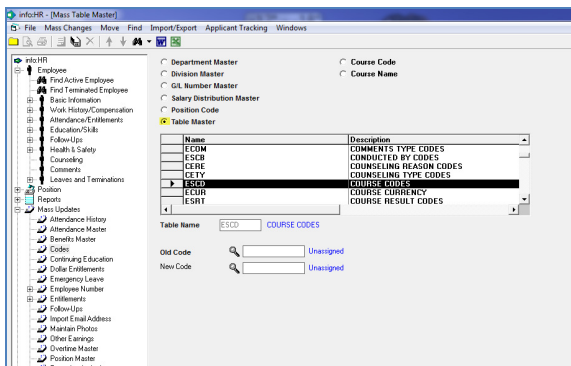
Course Type:

Inactive Code:

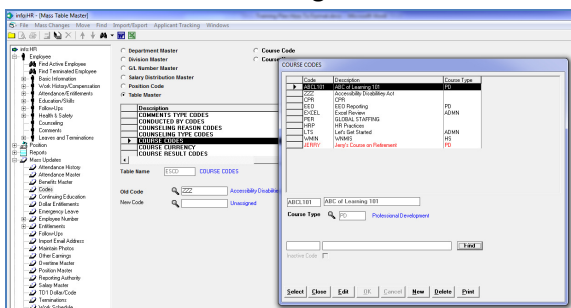
Buttons: Select, Close, Edit, OK, Cancel, New, Delete, Print

### Changing a Course Code or Merging Codes

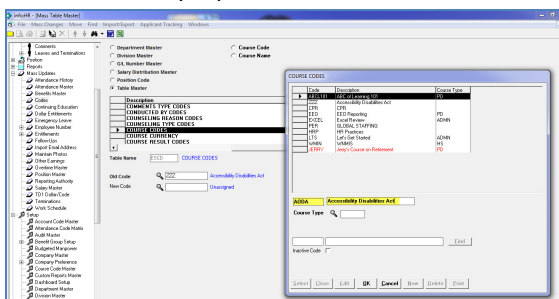
1. Select:
  - Mass Updates**  **Codes**
2. Click on the **Table Master** radio button.
3. Select **Course Codes** from the list of tables.






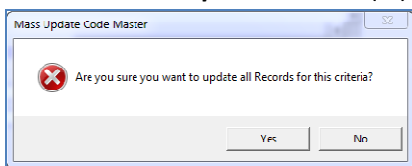
4. Enter the **Old Code** and the **New Code**.
5. If the new code is “Unassigned” Click the **New Code Magnify Glass** .




6. Click the **New**  button to create a new code.



7. Click the **OK**  button to save the code.
8. Click the **Select**  button to select the code.
9. Click the **Mass Update** button .



10. A confirmation message will come up. Click **Yes** .

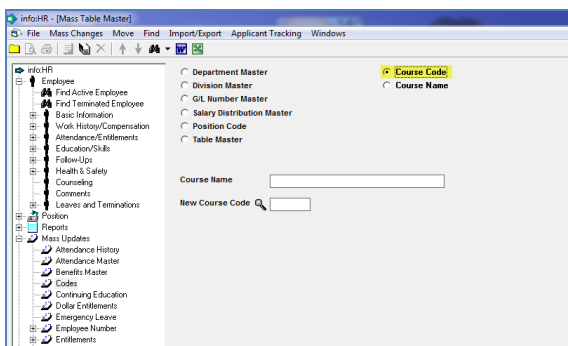


11. A update successful message will appear. Click **OK** (OK).

The **Mass Update** will change the **Old Code** throughout the system to the **New Code** for all active and terminated employee records.

### Changing Multiple Codes with the Same Course Name

1. Select:  
**Mass Updates** ➔ **Codes**
2. Click on the **Course Code** radio button.

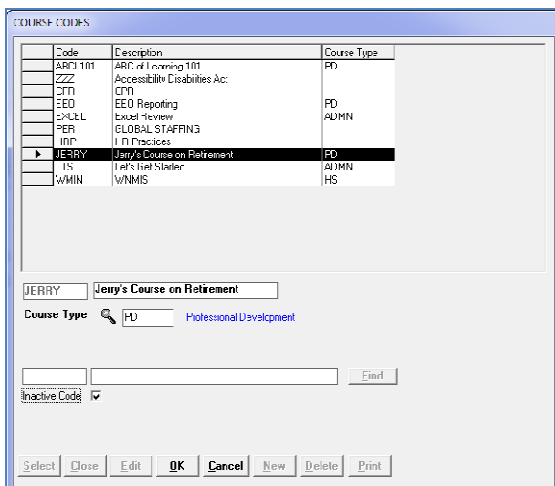


3. Enter the **Course Name** as seen in the **Table Master Report**.
4. Enter the **Course Code** or select for the **Course Code Look up**.
5. Click the **Mass Update** button (M).


The **Mass Update** will change all records with the same **Course Name** to the **New Course Code**.

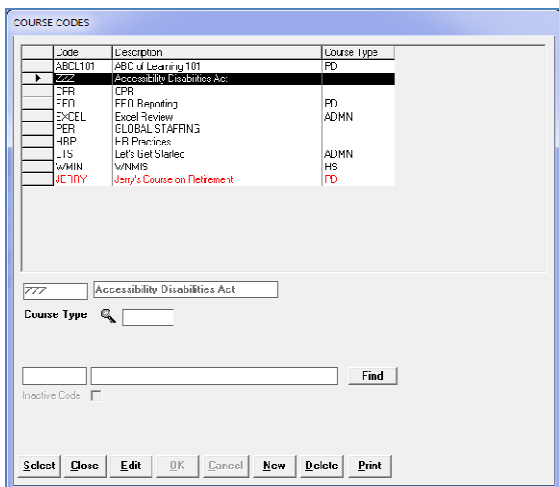
### Inactivating a Course Code

1. Open the Course Code Table  
**Reports** ➔ **Education/Skills** ➔ **Continuing Education**
2. Click on the **Course Code Magnify Glass** (M).



3. Select the **Course Code** that will be inactivated click **Edit** (E).

4. Check the **Inactive Code** Box and click **OK** (). The course will be sent to the bottom of the **Course Code** list and show in red.



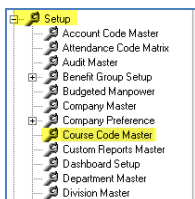
When you are satisfied that course codes have been cleaned up it is time to begin building **Training Plans**.


## Course Code Master

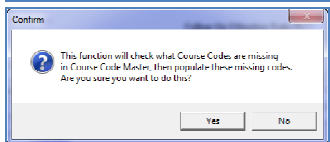
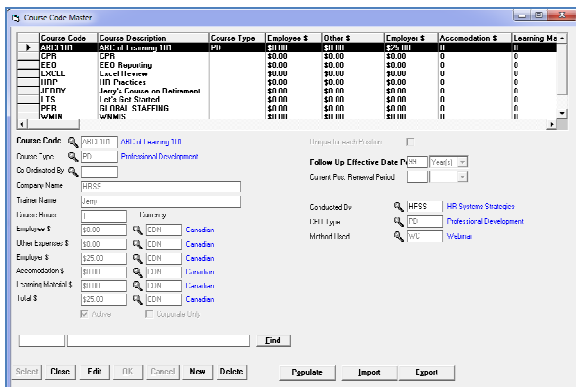
The **Course Code Master** must be populated prior to building **Training Plans**.

1. Select

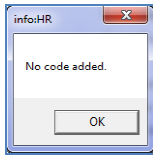
**Setup** ▶ **Course Code Master**



2. Click the **Populate** () button. This action will populate the **Course Code Master** with the **Course Code Table**.



3. A confirmation box will come up notifying you that you will be populating the **Course Code Master**. Click **Yes** (  ).

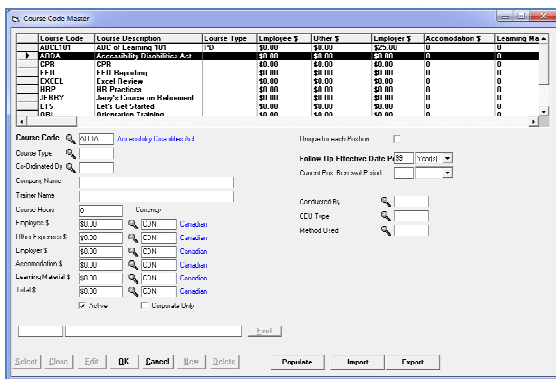


4. An update box will appear notifying you of the changes made. Click **OK** (  ).

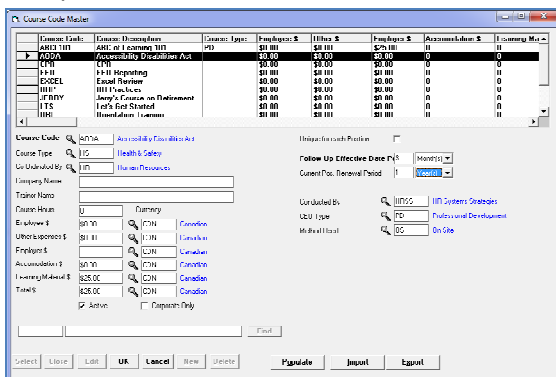
## Course Code Master

After the **Course Code Master** has been populated with **Course Codes**, complete the information you wish to track on a consistent basis. The information entered in the **Course Code Master** will auto-populate Continuing Education Records when a new course is entered.

1. Select the Course Code. Click **Edit** (  ).



2. Complete the information as desired.





3. Enter the Renewal Periods.

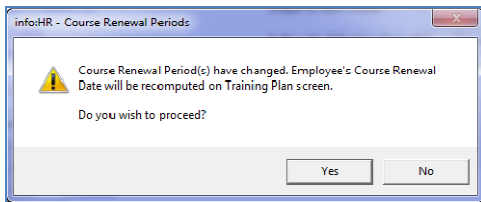
**Unique for each Position** means the renewal periods may be different from one position to the next.

**Follow Up Effective Date** means the length of time a person may occupy a position before completing the training.

**Current Pos. Renewal Period** means how frequently the training is to be renewed.

**Note:** The above example shows the Course selection must be completed within 3 months of attaining the position and must be renewed on an annual basis. Follow-up records will be created by the system for both dates.

4. Click **OK** ( ).



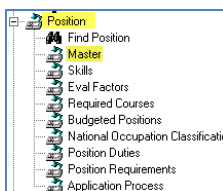
5. A notification will come up letting you know the renewal dates will be recomputed. Click **Yes** ( ).
6. Complete the above steps for all courses to be used in Training Plans.

## Building Training Plans

### By Position

1. Select

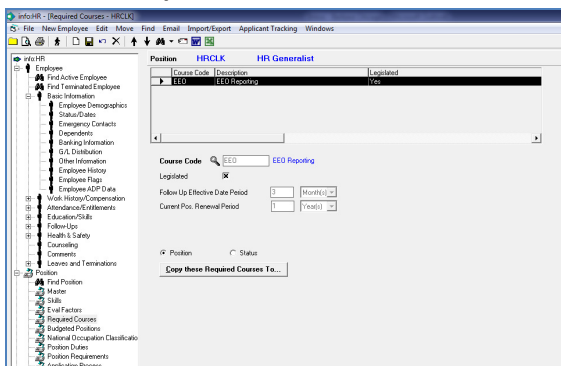
**Position Master**



2. Select the Position you will be building the Training Plan for.

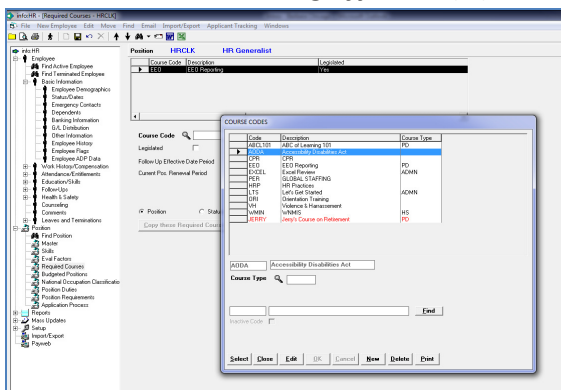
3. Select

**Position** **Required Courses**



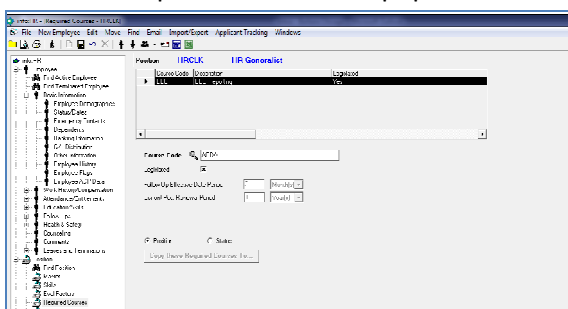
4. Click **New Record** button (  ).


5. Click the **Course Code Magnify Glass** (  ).

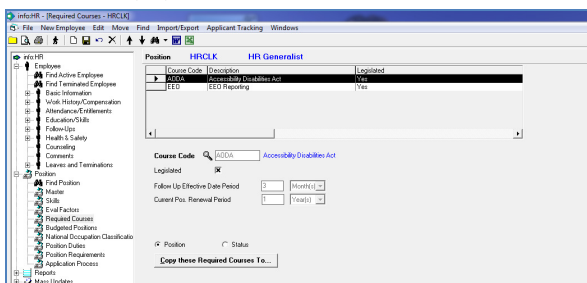


6. Select the course from the list. Click **Select** (  ). If the course has a legislative requirement check the **Legislated** box.

**Note:** The Follow up dates have been populated from the **Course Code Master**.



7. Click **Save** (  ) to save the record.



8. The course has been added to the required courses for the position selected.

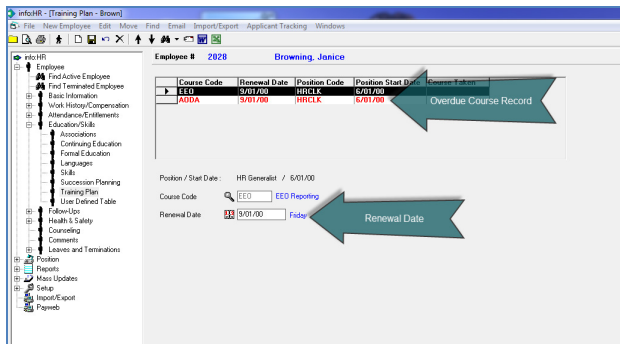
In our example we have used the HR Generalist position. Janice Browning is the employee who holds the position of HR Generalist. To view the outcome of a Position Training Plan we will be working with Janice's profile. In the next section we will explore an Individual Training Plan.

## By Employee

Select an employee. In our example we will be working with **Janice Browning**.

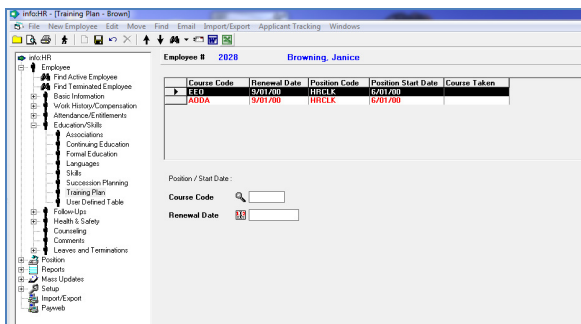
1. Select:


**Employee** ➤ **Education/Skills** ➤ **Training Plan**

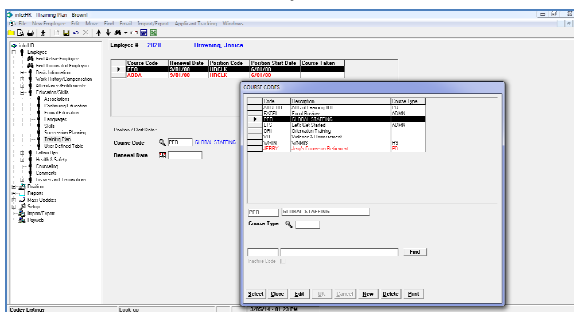



**Note:** You will notice the **AODA** Education Code we attached to the Position Training Plan. It is showing in red because, according to our Training Plan **Follow up Effective Period** we set up in the **Course Code Master**, the training is overdue.

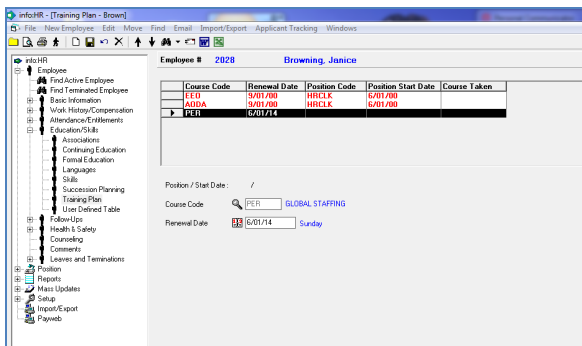
2. Click the **New Record** button (  ).



3. Click Course Code **Magnify Glass** (  ).
4. Select the Course Code you would like to add to Janice's training plan.



5. Enter a **Renewal Date**.
6. Click **Save** (  ) to save the record.



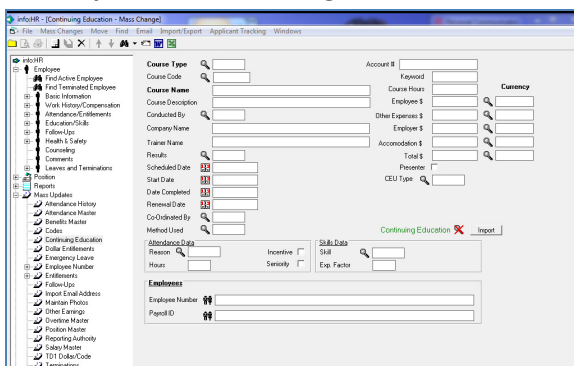
- The training has been added to Janice’s personal training plan. You will notice that the position code and position start date remain blank; this is an indication that the course has been individually added and not generated automatically from the position’s required course list.

## Entering Continuing Education Records

### Mass Update

- Select

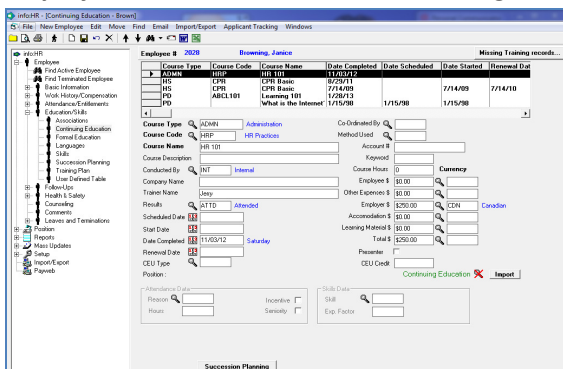
#### Mass Updates ➔ Continuing Education



- Enter the **Course Code**. You will notice, upon selecting the **Course Code** the screen will be populated with the information from the **Course Code Master**. You are able to change the information if required.
- Complete as much or as little information as required in accordance with your corporate policy.
- Enter a **Date Completed**. As long as the course is in the **Course Code Master** with a renewal period there is no need to enter a **Renewal Date**. The system will generate **Follow-up** records using the Date Completed and the **Current Position Renewal Period**.

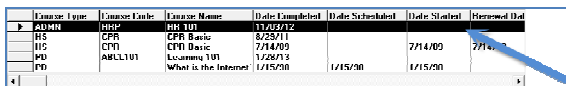
## Individual Records

1. Select **Employee** ▶ **Education/Skills** ▶ **Continuing Education**

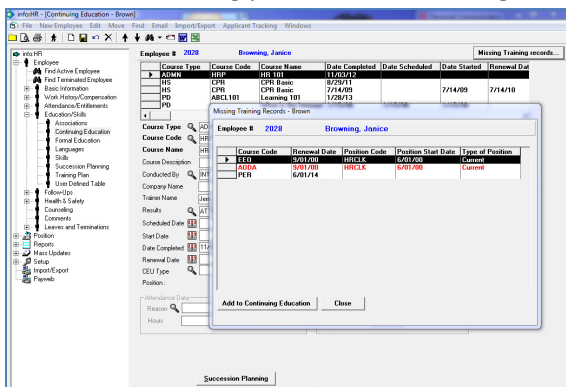


**Note:** In this screen you will view the **Continuing Education** records of the employee selected. These are historical records of courses that have been completed.

2. To view the details of a record click on the record in the grid box.

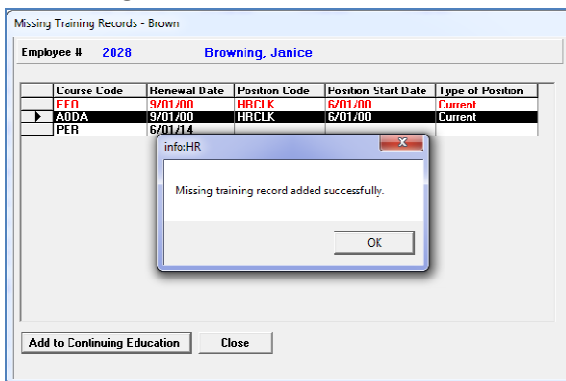


3. To view the training plan, click the **Missing Training Records**.

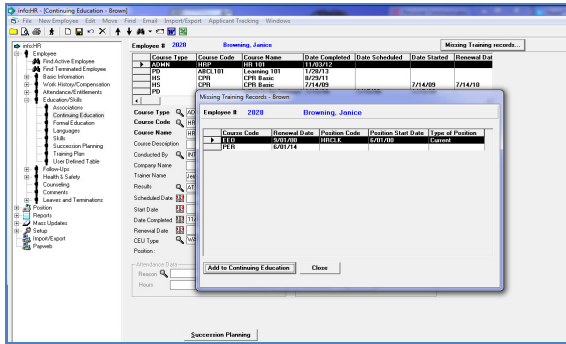


**Note:** Course codes will show in red if they are overdue and black if they are not.

4. To add a course to the continuing education screen select the course code and click the **Add to Continuing Education**.

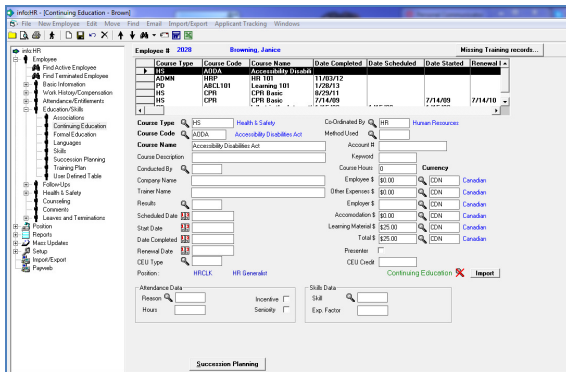


5. Click **OK** (OK).



**Note:** The course code has been removed from the **Training Plan** list.

6. Click **Close** (Close)



7. Select the course you have added to the Continuing Education records from the grid box and complete the information required.

**Note:** It is not necessary to enter a **Renewal Date**, the **Training Plan** and the **Course Code Master** will generate a **Follow-Up** record for the renewal.

8. Click **Save** (Save) to save the record.

## Reporting

### Continuing Education Report

The purpose of this report is to summarize continuing education courses that have been taken. This report can be run to give an overview of courses taken by course type or course code. The user can ask for specific date ranges, renewal dates, results, training methods, etc. It can also be used to identify employees who have not taken a particular course.

### Required Courses

The purpose of this report is to list employees and the courses which are required by their Position. To produce this report Required Courses must be set up for the Position in the Position Master.

### Training Matrix Report

The purpose of this report is to provide the user with a visual breakdown of courses, employee completion dates and Legislative or Organization requirements. This report will open in Excel. Legends at the top of the report will indicate colour meaning and requirements.

### **Training Plan Report**

The purpose of this report is to provide the user with information on the Training Plans created, based on an employee's position and required courses for that position. Individual courses added to the employee's Training Plan are also printed. You will be able to view courses, dates taken, renewal dates and whether the course is a requirement of the position.