



COLLABORATIVE QUALITY SYSTEMS

TRAINING MANAGEMENT SYSTEM

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Introduction

The Training Management System (TMS) was developed to be implemented at the departmental level of an ISO9001/2000 compliant quality system or within a company working to achieve ISO9001/2000 certification. Unlike paper logs and other flat file tracking systems, the TMS system is a truly relational database that applies logical relationships to all the information needed to manage a compliant training activity.

Once initial loading of base information is completed, routine updates and data management are completed without redundant inputs.

Information entered for new training classes is automatically linked to the training records of all those attending.

Likewise, updating a specification's revision level automatically links to all the employees requiring this specification per their job profile. This feature provides immediate information as to who needs to be trained to the new revision.

Throughout this manual we will address how to manage your training information and how this information can be used to assure your training is fully ISO9001/2000 compliant.

TMS Overview

A keystone to an effective ISO9001/2000 quality system, this database management system maintains all necessary information to provide quality records, define training requirements, and report on training needs.

TMS organizes the user's training information into basic categories: Personnel, Job Profiles, Job Requirements, Departments, and Specifications. Once this base information is entered, training requirements are easily identified by employee, by department, and by specification. As training is completed, information on the training class is entered along with the attendees.

ISO Auditors look for a defined set of training requirements for each job and then seek to confirm that the proper training has been administered. Auditors also look for evidence that a business can identify training needs when a specification is revised or when job requirements are updated. The Training Management System provides all these capabilities and more.

Key Benefits

- Meets ISO9001/2000 requirements.
- Ability to produce employee training records on demand.
- Ability to generate "Training Needed" reports by Employee, by Specification, and by Department.
- Ability to maintain and print Job Profiles with training requirements.
- User configurable. Your company Logo and information is automatically printed on every report.
- Ability to View, Print or Email any Report. (Emails use Microsoft Snap Attachments)
- Manages revisional training and annual certification training.
- Single user, multi-user and networked versions available

Implementation Methods

There are two recommended implementations for this product.

Facility Implementation: The TMS system is installed on a single PC used by the facility Training Coordinator. The coordinator is responsible to maintain the system by receiving updates from all departments. The follow processes must be implemented:

1. The training coordinator must receive notice when a new specification revision is approved. Entering this update, the coordinator can then report back with a detailed report on who needs to be trained.
2. All training class rosters are forwarded to the coordinator for entry into the system.

Departmental Implementation: Training Coordinators are assigned for each department or departmental group. The TMS system is installed on each coordinators PC. The Training coordinator is the focal point for system updates and reporting. The follow processes must be implemented:

1. The training coordinator must receive notice when a new specification revision is approved. Entering this update, the coordinator can then report back with a detailed report on who needs to be trained.
2. All training class rosters are forwarded to the coordinator for entry into the system.

Licenses

Single User License

This software is released for use on one (1) personal computer and is copyrighted by Collaborative Quality Systems.



The TMS Application and User data file reside on the user's PC.

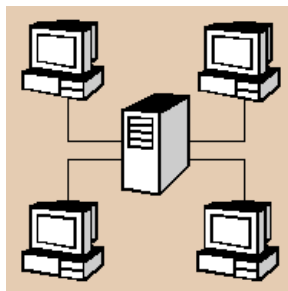
Networked User Licenses

Multiple user licenses are available for 1, 2, 3, 4, 5, 10 and 25 users. This software is released for use on individual personal computers or networked and is copyrighted by Collaborative Quality Systems.

This software is released for use on a network server. Users can run the application on their networked PC sharing the data located on the server.

The 1 user networked license allows a single user to place their data on a network server to take advantage of network backups. The software is copyrighted by Collaborative Quality Systems (known as CQS in the following text)

Sample Multi-User Networked Installation



The TMS Application resides on each user's PC.

Users share a common data file that is located on a server.

Registering TMS™

Each new version of *TMS™* will display a registration screen after being installed. The “registration key” will be issued and emailed directly to the user (Purchasers email address). Once the “key” has been entered, this screen will not appear again.

TMS Registration

TMS Registration

CQS
Collaborative
Quality Systems

Product Key
7777 TM 7777

Product Owner
First Name: Maxwell
Last Name: Smart
Company: Collaborative Quality
Email: info@collaborativequality.com

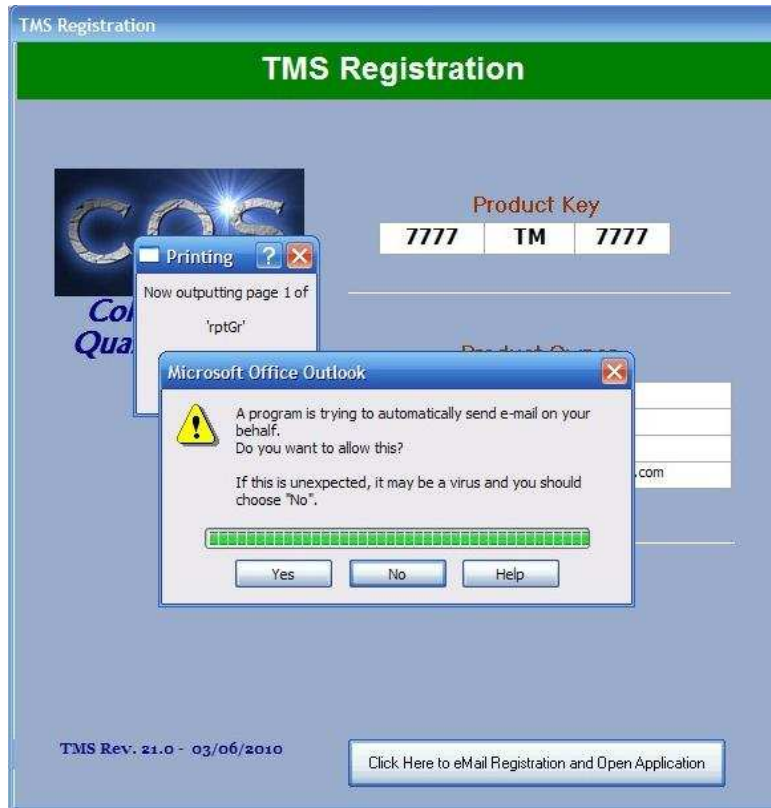
TMS Rev. 21.0 - 03/06/2010

Click Here to eMail Registration and Open Application

Registration Screen

When the **system** is registered by entering a valid “registration key” the system will display a screen announcing that an email is being issued.

Enter the registration key as it appears in your email message from CQS. Then enter your name (first name then last name), your company name and your email address. Left click on the “*Click Here to Email Registration and Open Application*” button to continue with the TMS registration. An email is sent to CQS button. This email is required to complete the registration process and important to you as your address is added to our product upgrade announcement list. Please refer to Appendix 3 for information regarding email constraints.



Registration Confirmation Screen

This email contains the registration information that is being transmitted to CQS. Select the *Yes* button to transmit your registration data.

Updates to the Registered System (Service Contract must be active)


Updates that add or improve functionality will occur randomly. A notice, with download instructions, will be issued each time the TMS version changes. Therefore, keeping your registration and contact information current is important. Clicking the “Update Contact Information” button on the main menu allows updates to your company registration data. The following screen will appear asking for user identification. This information is conveyed to CQS ensuring that we are aware of the version that each of our clients has installed.

Updating your contact data takes only minutes and does not affect the data files.

Registration Update

TMS Registration Update

Service Expiration Date: **08/04/2010**



Use this form to keep the CQS customer database current. Information on new revisions, updated documentation and corrections are emailed to this list.

Contact Information

First Name: James
Last Name: Madison
Company: Collaborative
Email: info@collaborativequality.com

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Close / Without Updating **CLOSE / EMAIL UPDATE**

TMS Registration Contact Data Update

From the "Main Menu", select the *Update Registration* button on the lower left portion of the "Main Menu" screen. When the Registration Update screen appears filled in with the first and last name of the primary contact for TMS, company name and email address then select the *Close/Update* button on the lower right portion of the screen. By doing this each time you update your software CQS will be notified of the release level you are operating and will be better informed to assist you in case you have technical issues.

SERVICE CONTRACTS

The initial purchase of *TMS*[™] includes a one year service contract. This provides you with updates to the application as they released and direct support for your implementation when needed. Service contract expiration has no affect on your installed application. Annual renew is not required.

TMS Service Contract

TMS Service Renewal

Service Expiration Date: **03/07/2011**

CQS
Collaborative
Quality Systems

TMS Service Renewal
[TMS Service Renewal Link](#)

You will receive a New License key via Email from CQS to enter below.

Renewal Product Key

TMS Rev. 21.0 - 03/06/2010

Click Here to Close or Renew

TMS Service Contact Update

After purchasing a Service Contract renewal from CQS, you will be emailed a new registration key. From the "Main Menu", select the *Update Service* button on the lower left portion of the "Main Menu" screen.

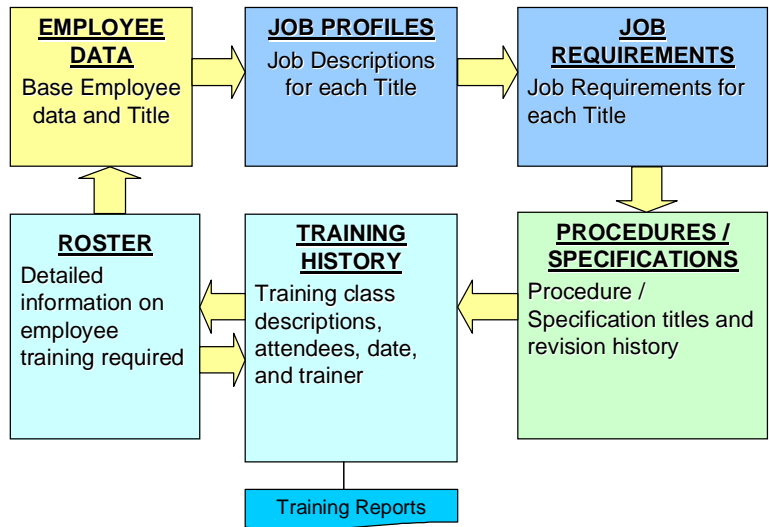
Enter the registration key as it appears in your email message from CQS. Then left click the "**Click Here to Close and Renew**" button to continue with the TMS registration. An email is sent to CQS. This email is important to you as it conforms to CQS that your service renewal has been activated. Please refer to Appendix 3 for information regarding email constraints.

DEMO VERSIONS

Demo versions of *TMS*[™] automatically lock after the trial period. A screen informing the user that the trial period has ended will appear. **You must retain the original installation CD or download zip file in order to un-install *TMS*[™].**

You may purchase *TMS*[™] by visiting the web site at www.collaborativequality.com

Training Management System



TMS Relational Structure

Snap Viewer

Snap files are used by this application's email functions. ("SNAP" is a Microsoft application similar to Adobe Acrobat.) Anyone you email a snap file to will need the Snap Viewer installed as well as yourself. Go to the Microsoft Website to download a free copy.

<http://www.microsoft.com/accessdev/prodinfo/snapdl.htm>

Getting Started / System Overview

Initial Data Entry

Due to the nature of relational systems, **initial** data entry **MUST** be performed in the following sequence. Once you've complete the initial data entry work, updates can be performed in any sequence. You can begin your initial entry work by selection "Getting Started" from the mail menu of the application.

INITIAL DATA ENRTY SEQUENCE

- Company Data
- Departments
- Specifications
- Job Profiles
- Employees

The "Getting Started" option below is accessed directly from the main menu.

Getting Started

CQS *Training Management System*
Getting Started

Full functionality is achieved only after your company's base data has been entered. Complete the following steps prior to using the planning functions.

STEP 1: Enter data about your Company

STEP 2: Enter data for Departments

STEP 3: Enter data for Operational Specifications

STEP 4: Enter data for Job Profiles and Requirements

STEP 5: Enter data for your employees

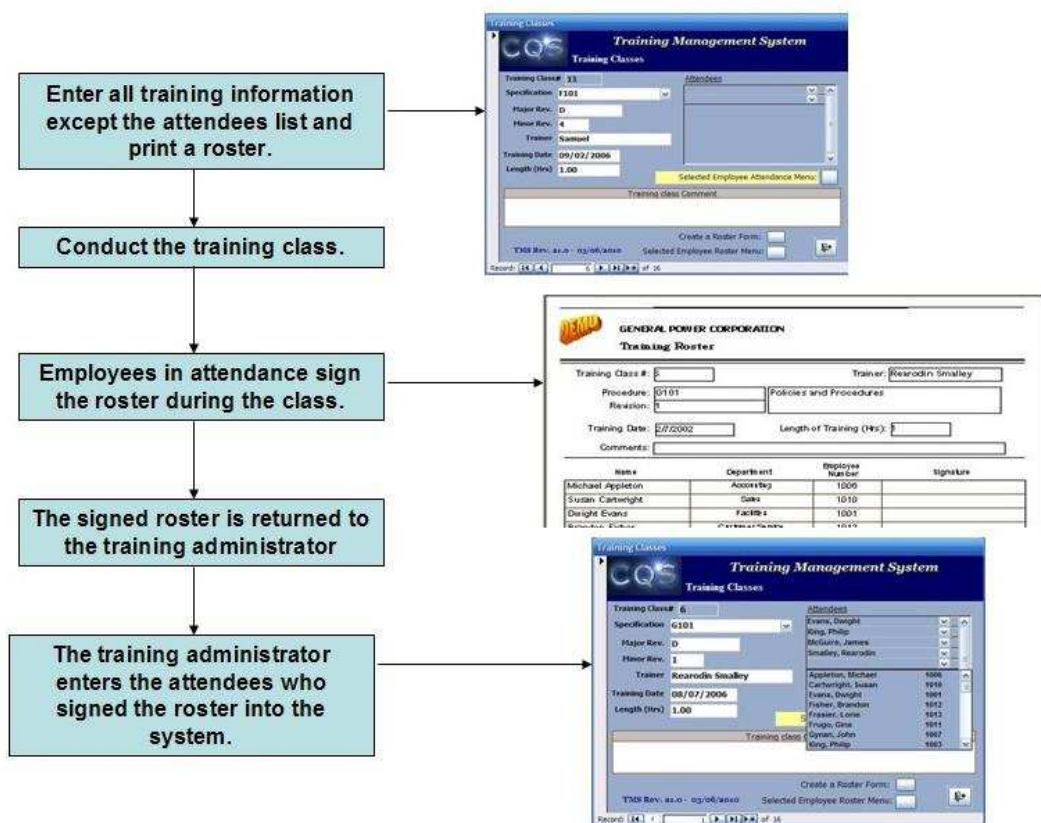
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Getting Started / System Overview

Managing Training Data

Once initial loading has been completed, you'll only need to return these items when maintenance is required to update Specification Revisions or add/inactivate employees ect. Your main activities will now be managing the actual training planning and entry. The training activity will follow either of the flows that follow. Understanding these processes will aid in your understanding of the rest of this manual.

Option 1: The training class is defined in advance and the administrator is able to enter the initial class data to print a roster with header information from any of the rosters options R2 thru R5. (To be explained later)



System Detail

The Main Menu

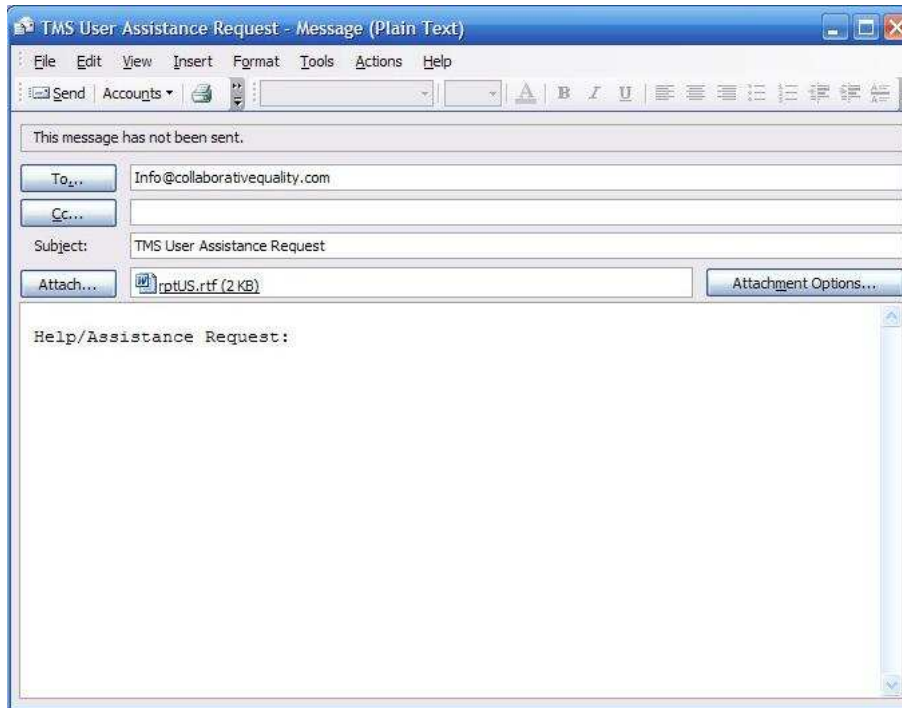
The main Menu directs you to the various sections of the program. You will find the screens ordered in the same sequence you'll perform data entry. The "Getting Started" button provides a quick start for users performing initial loading of the system.



Main Menu

The "Stop Sign" button closes the application.

“Questions/Assistance” opens an email screen pre-addressed to CQS.



The following shows a sample of the content of the Help Request attachment.



We make it really easy for you to ask us questions or send us your improvement ideas. This email function automatically attaches a file containing specifics of your product and revision. Enter your request and click send to forward to CQS for action.

“Quick Certification Check”.



The above example of this function shows that “11” employees are due for certification and recertification training. This number will be “0” when all Certification requirements are met. The complete details are available in the Planning Menu on the “Certification” as follows.

CQS		GENERAL POWER CORPORATION					
Annual Re-Certification Required							
Customer Service - Business Practices							
CS101 Current Rev. Major: A Minor: 1							
Badge/Emp#	Job Title	Department	Supervisor	Site	Trained to	Date Trained	
Frasier, Lorie	1013	Customer Service Associate	Customer Service	Julia Edwards	Portland	A	06/06/2006
Policies and Procedures							
G101 Current Rev. Major: D Minor: 4							
Badge/Emp#	Job Title	Department	Supervisor	Site	Trained to	Date Trained	
Cartwright, Susan	1010	Senior Sales Associate	Sales	Danielle Collins	Portland	D	06/22/2009
Evans, Dwight	1001	Junior Facilities Associate	Facilities	Loren Waters	Portland	D	08/07/2007
Frugo, Gina	1011	Executive Sales Associate	Sales	Danielle Collins	Portland	D	06/22/2009
Gynan, John	1007	Account	Accounting	Maxwell Smart	Portland	D	06/22/2009
King, Philip	1003	Janitor	Facilities	Loren Waters	Portland	D	08/07/2007
McGuire, James	1014	Shift Manager	Management	Robert Downey	Portland	D	08/07/2007
Smalley, Rearodin	1015	Store Manager	Management	Robert Downey	Portland	D	08/07/2007

Company Data

Select “Company Data” from the Main Menu or from the “Getting Started” menu.



formUS : Form

CQS **Training Management System**

Our Company Data

TMS Rev. 21.0 - 03/06/2010

Company Name: **GENERAL POWER CORPORATION**

Address1: **152 WILL DRIVE**

Address2:

Address3:

CITY: **CANTON**

State: **MA**

Postal Code: **02021**

Country: **USA**

Web Site: **www.powergeneral.com**

Main Phone: **617-555-9000**

Our Specification Revision System is:

Numbers (Only)

Letters and Numbers

Major Rev and Minor Rev

Help

Add your Logo to Report Headers throughout TMS. Paste a jpg of your logo into C:\Program Files\CQS Applications Use (replace) the filename MyLogo.jpg.

Company Data Form

This form is used to enter information about your company including a jpg file of your logo. To place your logo in the system, copy a jpg file of your logo, and paste it the logo box of the “Our Company Data” screen above. The information from this form is used extensively in formatting reports.

Lastly, YOU MUST SELECT ONE OF THE THREE OPTIONS IN THE “Our Specification Revision System is:” BOX FOR THIS PROGRAM TO WORK PROPERLY. (Circled above)

1. Numbers (Only) – example: Your Specification is SOP1234 Rev. 4
2. Letter and Numbers - example: Your Specification is SOP1234 Rev. D
3. Major Rev and Minor Rev - example: Your Specification is SOP1234 Rev. D.2

A sample of the systems reports can be found in **Appendix 2**

The Maintenance Screens

Selecting “Departments, Employees, Jobs and Requirements” from the Main Menu brings you to a maintenance selection screen. Each selection from this screen opens a subsequent menu with editing, updating and reporting options for the selected category.



Specification Update Menu



Personnel Update Menu



Job Profile Update Menu



Departments Update Menu

1. Entering Department Data

- To begin the Departments data entry process, click “**ADD or UPDATE Departments**” from the Department Menu. Current departments contained in the database appear, showing Site, Department code (Depart code is 5 characters max), Department Name (DepartName), and Manager (Mngr).

	Site	Depart	DepartName	Mngr
▶	Boston	Acct	Accounting	Maxwell Smart
	Chicago	CSrv	Customer Service	Julia Edwards
	Boston	Fclt	Facilities	Loren Waters
	Boston	Mng	Management	Robert Downey
	Portland	Sales	Sales	Danelle Collins
*				

TMS Rev. 21.0 - 03/06/2010

Departments Form

- To add new department data, click the blank row (marked by *) and add desired information for Site, Department, Department Name, and Manager.
- To update current information, click on the section of the row you wish to change. Delete the data within that field and enter new data to replace it.
- To delete an entire department, place your cursor in the boxes on the left of the table until it turns to a right pointing arrow. LeftClick the mouse to select the row and press the “Delete” key on your keyboard.
- Click the exit door icon to return to close.

2. Entering Job Profiles

- To begin managing job profiles, “**ADD NEW PROFILE or UPDATE PROFILES**” from the Job Profile Menu. If an update function is selected, the current profiles contained in the database appear

Job Codes

Training Management System

Job Descriptions

Job Code **ACI**

Job Title Account Associate

Enter List of Spec's needed for this Job.

Job	Required Spec#	Description
▶ A101		Maintains Accounts receivables
*		

TMS Rev. 21.0 - 03/06/2010

Record: 1

Job Profiles Form

- To add a new profile, click the **NEW** button on the Access Navigation bar. (Appendix 1)
- JOB CODE:** enter the job code abbreviation. (5 characters Max)
- JOB TITLE:** enter the full job title.
- DESCRIPTION:** enter the description of the job including primary responsibilities for that position. (an optional field)
- Required Spec#:** Using the drop down menu Click to add the appropriate required specifications to the table. Move down one line and use the drop down menu to add additional Specifications to the table. Specifications listed in this section are Mandatory Training Requirements for the job code.
- Click the exit door icon to close.

3. Entering Specifications

- To begin managing specifications select one of the management function from the Specifications Menu. If an update function is selected, the current specifications contained in the database appear.

Specifications B

CQS Training Management System
Specifications with Major and Minor Revs

Specification # Active

Specification Title

Specification Owner Depart

Annual Certification Required

Training to this Specification is required for ALL employees?
Select "Yes" or "No"

An Employee Orientation Requirement. Select "Yes" or "No"

	Major	Minor	Date Approved	Change
▶	A	1	01/01/2001	Initial Release
	B	2	03/22/2002	Added new criteria for accounts with bounced che
	1234567891	3	06/22/2005	Updated credit card process section.
*		0		

Record: of 3

TMS Rev. 21.0 - 03/06/2010

Record:

Specifications Form

- **SPECIFICATION #:** Enter the specification number.
- **ACTIVE:** Selective active to specifications in use. Remove active check when specifications are obsoleted.
- **SPECIFICATION TITLE:** Enter the complete title of the specification
- **ANNUAL CERTIFICATION REQUIRED:** Check this box if employee training to the specification requires retraining annually. This usually applies to safety related trainings such as fork lift safety, etc.

- **DEPARTMENT:** Use the drop down to select the department responsible for maintenance of this specification. This dropdown will list the departments you previously entered in the Departments screen. (an optional field)
- **REV TABLE:** The table located at the bottom of the form is for Specification revisions. Fill out applicable portions of the table. The rev table shown is for a Numeric revision control system. The screen will appear slightly different for the alpha-numeric and major/minor revision control systems. Both the Revision and Revision Date are required for proper system operation.
 - **REV:** Enter the specifications revision.
 - **Minor:** Enter the Minor rev level.
 - **DATE APPROVED:** Enter the date the revision was approved. (mm/dd/yyyy).
 - **CHANGE DESCRIPTION:** Enter text to describe the change.

Note: When adding revision details, do not overwrite previous entries. Instead, add new lines. This ensures that a detailed Specification history will be available to ISO auditors.

- Use the exit door icon to return to close.

4. Entering Employee Data

Personnel

CQS Training Management System

Personnel Records

Badge/Emp# **1006**

Mandatory Fields - May cause system errors if left empty.

FirstName **Michael** Inactive

MiddleInt

LastName **Appleton**

Site **Portland**

Shift **1**

Start Date **06/22/2001** mm/dd/yyyy

Email:

Job Code **AC1**

Supv **Maxwell Smart**

Department **Accounting**

TMS Rev. 21.0 - 03/06/2010

Record: 1 of 14

Personnel Management Form

- To begin managing employee information, select one of the management functions from the Personnel Menu. If an update function is selected, the current profiles contained in the database appear.
- **EMP#:** Enter the employee identification number. (a MANDATORY field)
- **DEPARTMENT:** Enter the department code using the pull down menu. The list in the pull down menu will appear with department codes next to their corresponding department titles. Run the cursor to the desired department code/title to highlight it. Click once and the selected department will appear in the field.
- **FIRSTNAME:** Enter the employee's first name.
- **MIDDLEINT:** Enter the employee's middle initial.
- **LASTNAME:** Enter the employee's last name.

- **JOB CODE:** Enter the Job Code by selecting from the pull down menu. The list in the drop down menu will appear with job codes next to their corresponding job titles.
- **SUPV:** Enter the name of the employee's supervisor.
- **Inactive:** Check the inactive box when an employee leaves the department or company. This will remove them from all the training needed analysis reports but will maintain their training record for data retention purposes. An inactive employees training record can be retrieved by selecting one of the reporting "By Selected Employee" options.
- Click the exit door icon to close.

Training Classes

Select TRAINING from the main Menu. This section allows you to access and manage training Class data. You have the option to add new training Class data, update all training Classes, or update a selected training Class.



Training Class Menu

The Training Class Entry Form

- The Training Class Entry form is used to enter new classes as well update existing classes.

The screenshot shows a software interface for entering training class information. The window title is "Training Classes". The header area features the "CQS" logo and the text "Training Management System" and "Training Classes". The form fields are as follows:

- Training Class#: 6
- Specification: 6101 (dropdown menu)
- Major Rev.: D
- Minor Rev.: 1
- Trainer: Rearodin Smalley
- Training Date: 08/07/2006
- Length (Hrs): 1.00

On the right side, there is an "Attendees" list with four entries, each with a dropdown arrow:

- Evans, Dwight
- King, Philip
- McGuire, James
- Smalley, Rearodin

Below the attendees list is a "Selected Employee Attendance Menu:" checkbox. At the bottom of the form is a "Training class Comment" text area. Further down are "Create a Roster Form:" and "Selected Employee Roster Menu:" checkboxes. The footer of the window includes "TMS Rev. 21.0 - 03/06/2010" and a record navigation bar showing "Record: 1".

Training Class Form

Training Management System

Training Classes

Training Class#

Specification

Major Rev.

Minor Rev.

Trainer

Training Date

Length (Hrs)

Attendees

Evans, Dwight	
King, Philip	
McGuire, James	
Smalley, Rearodin	
Appleton, Michael	1006
Cartwright, Susan	1010
Evans, Dwight	1001
Fisher, Brandon	1012
Frasier, Lorie	1013
Frugo, Gina	1011
Gynan, John	1007
King, Philip	1003

Create a Roster Form:

TMS Rev. 21.0 - 03/06/2010 Selected Employee Roster Menu:

Record: 1 of 16

Training Class Form w/Employee Dropdown Selector

- **TRAINING CLASS#:** This number is automatically provided by the system.
- **SPECIFICATION:** Select a Specification from the drop down menu. A list of Specification numbers with their corresponding titles appears. (If the required specification is not in the list, return to the Specifications Menu and add it) Select the desired Specification to highlight it. Click to select. The Specification number now appears in the field.
- **REVISION:** Enter the Specification's revision number at the time of the training.
- **TRAINER:** Enter the full name of the Class Instructor.
Use "Webcast", self spec review, Video Tape, etc for non-class based training.
- **TRAINING DATE:** Enter the training Class date in the mm/dd/yyyy format.
- **LENGTH (HRS):** Enter the duration of the training Class in hours. (1.25 for 1 hour 15 minutes)

- A large field appears near the bottom of the form with the title **TRAINING CLASS COMMENT**. Enter any additional comments you have about the training Class in this field.
- **ATTENDEE BADGE/EMP#:** Use the table at the right of the form to enter all the employees that ATTENDED the training class.

Note: For ISO compliance: Do not add the Employee numbers until they have actually attended training and sign a roster. Prior to entering the Employee numbers, using the roster option in the “Planning” section or from the Training Sessions Screen will provide various roster forms including the ability to produce a completely filled in form with employee information for all those that require training.

- Click the “Create a Roster Form” button for roster options.
- Click the exit door icon to close.

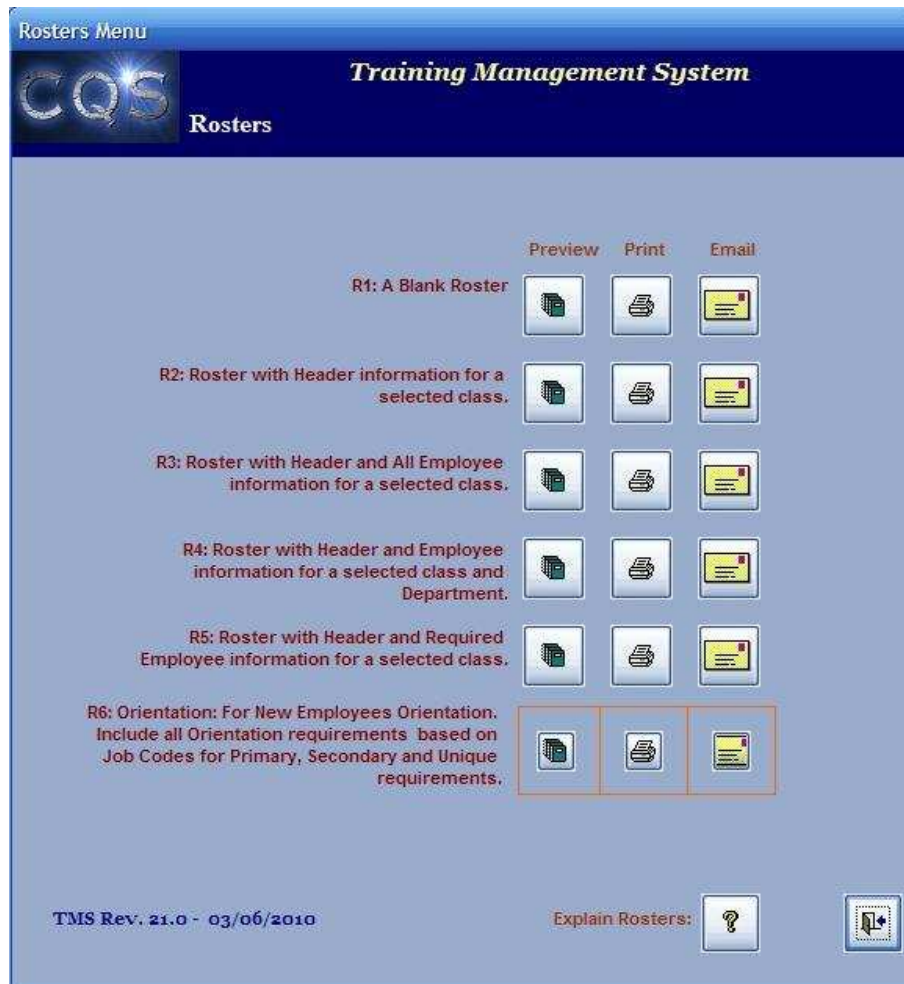
Updating Selected Class

To view a specific training Class, click **UPDATE SELECTED CLASS#** in the Training Class menu. An “Enter Parameter Value” screen appears and prompts you to enter a training Class number. Enter the number and click **OK**. The selected training Class form appears. Make necessary additions and revisions to the form. This option is used most often when entering the list of attendees that signed the roster form after the class has completed.

.Rosters

The Roster Menu allows user to view, print or email various rosters.

Completed Rosters with Employee signatures are Quality Records and are often reviewed by ISO Auditors. The TMS system provides easily traceable and auditable forms. Each completed Roster should be safely filed for easy retrieval when needed. We suggest rosters to be filed by Class number as a quick cross reference to TMS System data.



R1: A Blank Roster: Provides a completely Blank Roster Form. All information is to be written in. At the end of the training, employees must sign the form.

R2: Roster w/Header: Provides a Roster Form with the basic class information filled in. No employee information is included. The Employee data section is to be written in. At the end of the training, employees must sign the form.

R3: Roster w/Header and All Employees: The same as the Roster w/Header plus contains information for **all the employees** in the database pre-entered.

R4: Roster w/Header and Selected Department Employees: The same as the Roster w/Header plus contains information for **all the employees** for a selected Department pre-entered.

R5: Roster w/Header and Required Employees: The same as the Roster w/Header Plus contains all the information for only those employees needing this training pre-entered.

R6: Orientation: For New Employees Orientation. Include all Orientation requirements based on Job Codes for Primary, Secondary and Unique requirements.

R6: Selected Employee / Orientation Training

In past versions on TMS, users entered training by creating a Class and logging the employees that attended.

A new option has been added to produce a Roster for a selected employee that lists all the training needed for that individual rather than create several classes manually...

As the employee completes training, they complete this roster with Training Date, Trainer, training length and their signature. This roster is found in the Roster Menu from the Planning main menu.

GENERAL POWER CORPORATION

Employee Training Requirements Roster

Employee Name	EMP#	Job Code	Department			
Appleton, Michael	1006	AC1	Accounting			

Procedure	Current Rev	Trained to	Cert Exp?	Trainer	Training Date	Signature
A 101	Business Accounting Practices	1234567891				
G101	Policies and Procedures	D				

Once the Employee Training Roster is completed, the TMS System Administrator opens the Training menu and selects the new Option “Enter Orientation Training”.



After providing the Employee Number when requested. The training data for the employee is will be entered into their training record for all items with the “Update” box checked.

Employee Training Data Update

CQS Training Management System
Employee Training Update

Emp#	First Name	Last Name	Spec#	Current Rev	Trained to	Cert Exp?	Date Trained	Trainer	Training Time (Hrs)	Update
1006	Michael	Appleton	G101	D	D		03/07/2010	Maxwell Smart	0.5	<input checked="" type="checkbox"/>
1006	Michael	Appleton	A101	1234567891					0	<input type="checkbox"/>

.Reports

The remaining options on the Main Menu are for various reports from the data contained within the database. Reporting is divided into two sections: Reports and Planning.

Note that three reporting options are provided for each report.

- Preview: develops the report to be viewed on your PC screen.
- Print: Send the report directly to you default printer.
- Email: Prepares a Snap file for emailing and opens your new email screen with Subject line completed and the Snap File attached. You may add additional text in the message area and your email recipients.

Click on the Snap File Viewer button to obtain instructs on how to download a free copy from Microsoft.



Reports Menu

Planning Reports

Select planning from the Main Menu to open the planning menu.



Planning Menu

The Planning menu contains options to view, print and email reports including: Trained by Specification, Training Records, Training Needed by Employee, Department, or Specification, Printing Training Rosters, and a Certification Analysis - New and 60 Day Notice

Note that three reporting options are provided for each report.

- Preview: develops the report to be viewed on your PC screen.
- Print: Send the report directly to your default printer.

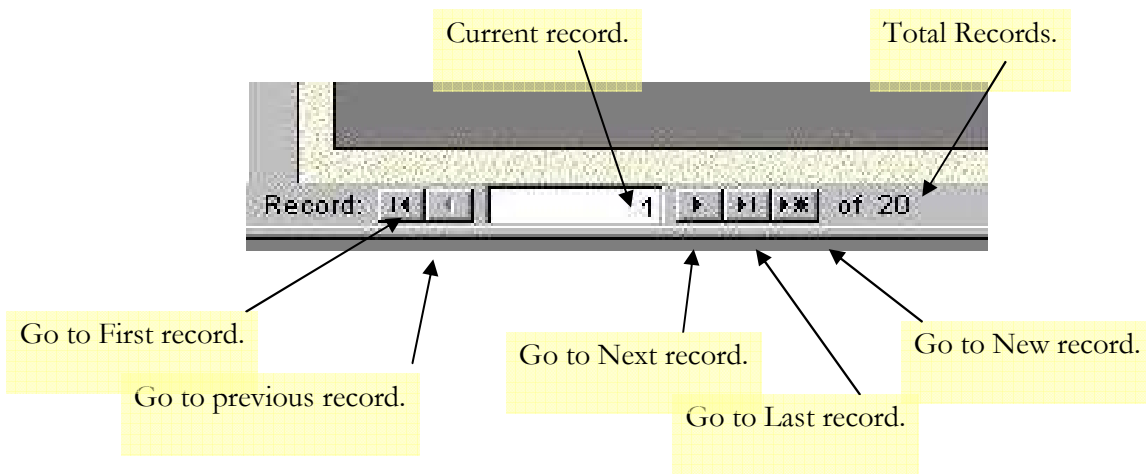
- Email: Prepares a Snap file for email, opens your new email screen with Subject line completed and the Snap File attached. You may add additional text in the message area and your email recipients.

Sample reports are in Appendix 2

Appendix 1

The Access Navigation Bar


The Microsoft Access Navigation bar appears at the bottom of data entry forms and reports throughout the database. The navigation bar allows you to move between records and, in some cases, create new records. The following is a reference menu for the buttons shown on the navigation bar. The current record number appears in the white field at the center of the Access navigation bar.



Appendix 2


TRAINING RECORDS: (from "Reporting" Section of the Main Menu.

The Employee Training Record report list all the training complete by employee including revisions and dates. The report is available sorted by Department/Employee, Employees sorted by name, and for an individually selected employee.

		GENERAL POWER CORPORATION					
Employee Training History							
Appleton, Michael							
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site		
1006	AC1	Account Associate	Accounting	Maxwell Smart	Portland		
Specification	Spec#	Current Revision	Trained to Revision	Trainer	Date Trained	Length	Class#
Handling Credit Cards	A103	A	A	Samuel	03/05/2007	1.25	8
Total Hours:						1.25	
Cartwright, Susan							
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site		
1010	SA2	Senior Sales Associate	Sales	Danelle Collins	Portland		
Specification	Spec#	Current Revision	Trained to Revision	Trainer	Date Trained	Length	Class#
Policies and Procedures	G101	D	D	DEMO	06/22/2009	1	34
Discounting	S102	B	B	DEMO	06/22/2009	1	35
Checkout Procedures	S104	B	B	DEMO	06/22/2009	0.35	36
Total Hours:						2.35	


SPECIFICATION REPORTS: (from “Reporting” Section of the Main Menu.

Reports detailing specifications include: Active Specifications, Specification History (includes all revs and lists specifications that have been obsoleted) and an Active Specification List by Department Owner.

		GENERAL POWER CORPORATION		Specification Revision History			
	Major	Minor	Revision Date	Change Description	Active	ReTrain	
A101 - Business Accounting Practices	A	1	01/01/2001	Initial Release	Yes	No	
	B	2	03/22/2002	Added new criteria for accounts with bounced checks.	Yes	No	
	1234567891	3	06/22/2005	Updated credit card process section.	Yes	No	
A102 - Accounts Receivable	A	1	01/01/2009	Initial Release	Yes	No	
A103 - Handling Credit Cards	A	1	01/01/2009	Initial Release	Yes	Yes	
CS101 - Customer Service - Business Practices	A	1	01/01/2005	Initial Release	Yes	Yes	
CS102 - Refunding	A	1	01/01/2009	Initial Release	Yes	No	
F101 - Building Cleaning Procedures	A	1	01/01/2001	Initial Release	Yes	No	
	B	2	03/01/2004	General update to align actual practice with procedure.	Yes	No	
	C	3	05/01/2005	Provide detail on disposal of cleaning chemicals.	Yes	No	
	D	4	08/01/2006	Provide instructions of the proper use of clean materials in relation to environmental protection.	Yes	No	


SUMMARY REPORTS: (from "Reporting" Section of the Main Menu.

Upper level summary reports provide a fast reference to the amount of training needed by department as well as the amount of training previously completed.

 GENERAL POWER CORPORATION		
Department Summary - Training Needed		
Accounting	<u>Specification</u>	<u>Number of Employees</u>
	A101	2
	A102	1
	G101	2
Customer Service	<u>Specification</u>	<u>Number of Employees</u>
	CS101	1
	CS102	2
	G101	2

TRAINED by SPECIFICATION: (from "Planning" Section of the Main Menu.


Provide a detailed listing of the employees trained by specification. Can be used to identify cross training opportunities.

 GENERAL POWER CORPORATION					
Current Specification Training - Cross/Train Reference <i>Current Revision and Active Employees Only</i>					
Handling Credit Cards					
A103 - Rev Major : A Minor : 1 Certification Required :Yes					
	<u>Badge/Emp#</u>	<u>Job Title</u>	<u>Department</u>	<u>Supervisor</u>	<u>Date Trained</u>
Appleton, Michael	1006	Account Associate	Accounting	Maxwell Smart	03/05/2007
Gynan, John	1007	Account	Accounting	Maxwell Smart	06/22/2009
Gynan, John	1007	Account	Accounting	Maxwell Smart	03/05/2007
Roberts, Paul	1004	Janitor	Facilities	Sam Ober	03/05/2007
Travers, Christine	1008	Sales Associate	Sales	Danelle Collins	03/05/2007
White, Judith	1009	Senior Sales Associate	Sales	Danelle Collins	03/05/2007
Customer Service - Business Practices					
CS101 - Rev Major: A Minor : 1 Certification Required :Yes					
	<u>Badge/Emp#</u>	<u>Job Title</u>	<u>Department</u>	<u>Supervisor</u>	<u>Date Trained</u>
Fisher, Brandon	1012	Customer Service Associate	Customer Service	Julia Edwards	06/22/2009

TRAINING STATUS: (from “Planning” Section of the Main Menu.

Lists the required specification training needed for each employee (as defined by the job profile) with information on the training they have completed as well as providing a “Training Needed” flag in the last column.

...

		GENERAL POWER CORPORATION						
							Employee Training Status	
Appleton, Michael								
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site			
1006	AC1	Account Associate	Accounting	Maxwell Smart	Portland			
Specification	Spec#	Last Rev Trained	Current Rev	Rev Date	Trainer	Date Trained	Length	Training Needed
Business Accounting Practices	A101		1234567891	06/22/2005				YES
Policies and Procedures	G101		D	07/01/2009				YES
Cartwright, Susan								
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site			
1010	SA2	Senior Sales Associate	Sales	Danelle Collins	Portland			
Specification	Spec#	Last Rev Trained	Current Rev	Rev Date	Trainer	Date Trained	Length	Training Needed
Policies and Procedures	G101	D	D	07/01/2009	DEMO	06/22/2009	1	YES
Use of National Cash Register System	S101		B	04/01/2009				YES
Evans, Dwight								
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site			
1001	FC1	Junior Facilities Associate	Facilities	Loren Waters	Portland			
Specification	Spec#	Last Rev Trained	Current Rev	Rev Date	Trainer	Date Trained	Length	Training Needed
Building Cleaning Procedures	F101		D	08/01/2006				YES
Policies and Procedures	G101	D	D	07/01/2009	Rearodin Smalley	08/07/2007	1	Exp


TRAINING NEEDED: (from “Planning” Section of the Main Menu

This section provides a number of analysis options for a training needs analysis. Training needed reports only list the training requirements (per the job profiles) that have not been completed. This can include requirements where the training has never been met, retaining needed due to a new revision release, or recertification is needed.

Options in the Planning Training Needed section include looking at needs by Employee, By Department/Employee, and by Specification.

The benefits of these reports are numerous.

- A Specification has been revised: Use the “Training Needed – by Specification” to identify all employee that need training to the new rev.
- A department manager needs to asses employee training needs. Use the “Training Needed by Department” report.
- What are the current training needs of an individual employee? Use the “Training Needed – by Employee Report”
- A class is being scheduled for specific specification training, who should be invited to attend. Use the “Training Needed – by Specification Report”

		GENERAL POWER CORPORATION						
Employee Training Required								
Appleton , Michael								
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site			
1006	AC1	Account Associate	Accounting	Maxwell Smart	Portland			
Specification	Spec#	Trainer	Trained to	Date Trained	Current Rev	Rev Date	Training Needed	
Business Accounting Practices	A101				1234567891	06/22/2005	YES	
Policies and Procedures	G101				D	07/01/2009	YES	
Cartwright , Susan								
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site			
1010	SA2	Senior Sales Associate	Sales	Danelle Collins	Portland			
Specification	Spec#	Trainer	Trained to	Date Trained	Current Rev	Rev Date	Training Needed	
Policies and Procedures	G101	DEMO	D	06/22/2009	D	07/01/2009	YES	
Use of National Cash Register System	S101				B	04/01/2009	YES	
Evans , Dwight								
Badge/Emp#	Job Code	Job Title	Department	Supervisor	Site			
1001	FC1	Junior Facilities Associate	Facilities	Loren Waters	Portland			
Specification	Spec#	Trainer	Trained to	Date Trained	Current Rev	Rev Date	Training Needed	
Building Cleaning Procedures	F101				D	08/01/2006	YES	
Policies and Procedures	G101	Rearodin Smalley	D	08/07/2007	D	07/01/2009	Exp	



Specification Training Required

Business Accounting Practices

A101 - Major Rev: 1234567891 Date Approved: 06/22/2005 Certification Required :No

	Badge/Emp#	Job Title	Department	Supervisor	Date Trained	Trained to	Training Needed
Appleton, Michael	1006	Account Associate	Accounting	Maxwell Smart			YES
Gynan, John	1007	Account	Accounting	Maxwell Smart	06/22/2009	B	YES

Accounts Receivable

A102 - Major Rev: A Date Approved: 01/01/2009 Certification Required :No

	Badge/Emp#	Job Title	Department	Supervisor	Date Trained	Trained to	Training Needed
Gynan, John	1007	Account	Accounting	Maxwell Smart			YES


Customer Service - Business Practices

CS101 - Major Rev: A Date Approved: 01/01/2005 Certification Required :Yes

	Badge/Emp#	Job Title	Department	Supervisor	Date Trained	Trained to	Training Needed
Frasier, Lorie	1013	Customer Service Associate	Customer Service	Julia Edwards	06/06/2006	A	Exp

Training Roster: (from "Planning" Section of the Main Menu.


This planning option will provide a training roster to be signed by the employee at the end of training. When this report is requested, you will be asked for the specification and a roster will be developed listing all employees that require training. Employees sign the roster at the end of the training and the roster is given to the Training coordinator for entry into the system....

 GENERAL POWER CORPORATION Training Roster			
Training Class #:	<input type="text" value="6"/>	Trainer:	<input type="text" value="Rearodin Smalley"/>
Procedure:	<input type="text" value="G101"/>	<input type="text" value="Policies and Procedures"/>	
Major Revision:	<input type="text" value="D"/>	Minor:	<input type="text" value="1"/>
Training Date:	<input type="text" value="08/07/2007"/>	Length of Training (Hrs):	<input type="text" value="1"/>
Comments:	<input type="text"/>		
Printed Name	Department	Employee Number	Signature

CERTIFICATION REPORT: (from “planning” Section of the Main Menu.

The certification report will provide a listing of all employees that need annual certification by specification. Certification only applies to specification that have the “Certification Needed” option checked.

Employees are listed if they have never had the specific training or if their certification will expire within the next 60 days. It is advised that this report is run monthly to identify re-training needs prior to expiration.

		GENERAL POWER CORPORATION					
Annual Re-Certification Required							
Customer Service - Business Practices							
CS101 Current Rev. Major: A Minor: 1							
Badge/Emp#	Job Title	Department	Supervisor	Site	Trained to	Date Trained	
Frasier, Lorie	1013	Customer Service Associate	Customer Service	Julia Edwards	Portland	A	06/06/2006
Policies and Procedures							
G101 Current Rev. Major: D Minor: 4							
Badge/Emp#	Job Title	Department	Supervisor	Site	Trained to	Date Trained	
Cartwright, Susan	1010	Senior Sales Associate	Sales	Danelle Collins	Portland	D	06/22/2009
Evans, Dwight	1001	Junior Facilities Associate	Facilities	Loren Waters	Portland	D	08/07/2007
Fruigo, Gina	1011	Executive Sales Associate	Sales	Danelle Collins	Portland	D	06/22/2009
Gyman, John	1007	Account	Accounting	Maxwell Smart	Portland	D	06/22/2009
King, Philip	1003	Janitor	Facilities	Loren Waters	Portland	D	08/07/2007
McGuire, James	1014	Shift Manager	Management	Robert Downey	Portland	D	08/07/2007
Smalley, Rearodin	1015	Store Manager	Management	Robert Downey	Portland	D	08/07/2007

Appendix 3 – Auto-Email Constraints

Emails are formatted for Microsoft Outlook, Microsoft Exchange or another electronic mail application that use the Mail Applications Programming Interface (MAPI), which is the heart of Microsoft's messaging programs.

Extended MAPI serves three main purposes:

- It's the programming interface used to write components that connect to different mail servers, provide access to custom address books and provide rich storage facilities -- in other words, the components that you can add through see on the Tools | Services dialog in Outlook.
- You can use MAPI to develop new types of custom forms, not based on the built-in Outlook forms.
- You can create add-ins for Outlook, Exchange and Windows Messaging that extend the functionality of those clients.

Appendix 4 - Email Error Message

Email Error Message: "A Program Is Trying to Send..."

Symptoms

When you run any email action, you may receive the following message:

**A program is trying to automatically send e-mail on your behalf.
Do you want to allow this?**

If this is unexpected, it may be a virus and you should choose "No".

The **Yes** button in the dialog box is disabled for a few seconds, and then you are able to select **Yes**. If you select Yes, the e-mail message is sent. If you select No, the message is not sent, and you then see one of the following error messages.

“Email Complete” Action

Microsoft Access can't send a message for the reason stated in the preceding alert.

Resolve that problem, and then send the message again.

Cause

You have applied the Outlook E-mail Security Update.

More Information

For additional information about this security update, refer to the Microsoft website and search for the article [262617](#) OL98: *Information About the Outlook E-mail Security Update*