Training module
Workbench 11

Training: Workbench 11

Workbench Compliance and Standards Management Solutions

Workbench Professional and Quality Workbench are the flagship products of Ideagen Software Limited, who have been leading the way in software solutions aimed at Document, Compliance and Standards management since 1993.

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Contents

1 Introducing Workbench

Workbench is a collection of software modules designed to assist in the implementation and smooth operation of day to day management control. The overall system consists of the following modules:-

- Audits
- Customer Care
- Document Control
- Nonconformities
- ReportQuest **
- Test and Calibration
- Training

** ReportQuest is different in concept to the other modules; it is a 'plug-in' rather than a 'stand-alone' module. It integrates with any or all other modules and utilises the information stored in them.

Each module (apart from ReportQuest) has been carefully designed to be a powerful individual management aid and for many organisations it may be entirely appropriate to run any on a 'stand-alone' basis. There is, however, considerable integration between the different modules and this could offer many benefits to organisations running a comprehensive quality or other compliance management system. Any company that wishes to adopt a 'phased' implementation can add modules to the system as and when required.

The System Manager and Personnel modules are installed as an integral part of all other modules. The System Manager handles most of the system's security and it is envisaged that access to this module will be restricted to the system administrator and/or personnel with the highest security clearance. The Personnel module maintains a centralised database of personnel that can be accessed by every installed module; again it is suggested that access to this module be restricted.

Each module has its own electronic reference manual and on-screen Help system that is context-sensitive; these guides should not, however, be seen as a substitute for professional advice and training. Workbench is designed to be extremely easy to use in its daily operation but the preliminary setting up of a module can be relatively complex. We urge taking appropriate advice in these circumstances wherever possible, particularly where some doubt exists as to the best method of achieving specific business aims with the software.

The Help files assume that you have either Workbench Professional or Quality Workbench with all optional areas licensed. Any areas not licensed, will not be available.

1.1 Overview of the Training module

Current and appropriate staff training is essential to the success of a thriving company. The Training module from Workbench ensures that training requirements are identified and carried out in a controlled and effective manner. The module allows a comprehensive range of skills and qualifications to be logged; suggestions for future training may also be recorded, on a company-wide basis. Once set up, the module will then handle the scheduling and planning of user-definable courses at appropriate times.

Using the calendar common to all modules, these courses can be scheduled at optimum times and can include and notify appropriate personnel from multiple work-sites.

Two 'Wizards' - one dealing with Training Requirements and the other with Training Gained - allow information to be entered into the system quickly and logically so that users are encouraged to update records on an on-going basis.

All training requirement modifications are recorded automatically so that at any given time, a current picture of individual personnel training profiles may be obtained.

In addition to this, a variety of reports offer management a current and complete picture of skills, courses and qualifications available within the company and can highlight weak areas where perhaps further training may be advisable.

Training records are automatically updated to take account of passes and fails on scheduled training courses; and, where applicable, follow-up courses can be generated for each qualification.

Document Training is a separately licensed area that allows associated documents to be attached to a course when setting it up. When any of these documents is about to be issued, the associated course may then be scheduled (in the Document Control module), at which point the document is marked as 'Undergoing training' and cannot be issued until the course has been completed by all required attendees. Both the Document Control and Training modules must be licensed in order to acquire a Document Training licence.

1.1.1 Access and security

The module can be configured so that only individuals or groups with access can view training records. It can be further restricted to allow access to:-

- your own records only
- users reporting to you
- all users records.

However, as the **Personnel | Details** option in the Training module comes directly from the Personnel module, access to this menu item will be governed by the user's access level to the Personnel module not to the Training module. Access is controlled by the administrator using the System Manager module.

1.1.2 Training and messaging

The Training module fully supports the mail and messaging mechanisms found throughout Workbench. These allow the processing of messages through external e-mail systems in addition to the internal messages (Tasks and Notifications) that are automatically generated by the program and may be for either action or information only purposes.

The Tasks and Notifications buttons on the main toolbar give direct access to messages that inform relevant users of tasks they are required to perform and/or of the progress of a document/complaint etc. Figures along-side these buttons are constantly up-dated and a yellow light bulb indicates that you have unread messages.

See also: Messages generated by the Training module

1.2 Updates for Workbench 11

Workbench 11 includes several updates that have been introduced at the request of current users and are intended to enhance the product and give greater ease of working. None of the existing functionality of Workbench has been removed. Access settings for each area of configuration have been retained; visibility and access to changes will still depend on access rights.

NB. **Wherever reference is made (in Help topics) to the 'system administrator' this includes any user who also has access to the relevant options in the System Manager module. However, because the configuration options are so many, we strongly advise that access to the System Manager is very strictly controlled.**

Each relevant Help topic covers any changes in detail, but the main new system-wide updates are listed here.

System wide - general updates

The following general system updates have been added to Workbench 11.

- A new workflow setting *Automatically delete completed tasks* is switched off by default; if checked, then all completed tasks will automatically be deleted.
- A warning appears if the Caps Lock is on whilst typing a Password. This applies to the Workbench Login dialog and all other dialogs where a password is required.
- User Defined Analysis labels have been increased to accept up to 255 characters.

1.3 Training menus

 After logging in to Workbench a window will appear, allowing access to all licensed modules.

Click on the Training module button to view its main window. The module has eight menus - three of which (File, Module and Help) are common to all modules. The other five headings (Personnel, Training, Course, Settings and Reports) and their menu items run the module.

Personnel

Access to personnel details is via the Personnel menu. User (personnel) details may be viewed and edited, but new users cannot be set up here; they must be set up in the Personnel module. Personnel may be filtered by courses attended or by skills / qualifications obtained.

Training

The Training menu maintains training records and also houses two ‘Wizards’ - one to identify and log training requirements and one to identify and log training gained. Using the wizards, a great deal of information may be recorded in one dialog.

Also in the Training menu are three items that allow an individual’s training requirements, qualifications and/or profiles to be accessed.

Course

The Course menu is where existing courses are scheduled, edited (if necessary) and eventually marked as complete. Course results, either as a simple pass/fail may be recorded at time of completion and provision is made for more detailed results, numeric or descriptive - see Result descriptions.

Here you may also view any scheduled or completed course.

Settings

Much of the information needed to complete each training record is set up initially in this menu - information such as the type of course or review, definition of skills, courses and qualifications, location of courses and user-definable descriptions of scheduled courses and results achieved.

Details of suppliers and their contacts are also maintained here.

Reports

The Reports menu makes provision for different types of reports to be viewed, saved to file and/or printed. The flexibility of the reporting system allows for virtually any training related information to be searched for, sorted and presented in many different ways.

1.4 System menus

Several menu options are common to more than one Workbench module:-

- The File, Module and Help menus are always present on the main menu structure, irrespective of the particular modules you have purchased and installed.
- The Suppliers option (**Settings** menu) is used by the Audits, Customer Care, Nonconformities, Test and Calibration, and Training modules.
- The User Defined Analysis (UDA) option is also found in the Settings menu of individual modules and can be set up for different areas ie. Personnel UDA in the Personnel module, Supplier and/or Course UDA in the Training module. The only modules that do not use User Defined Analysis are ReportQuest and the System Manager module.
- User Defined Reports can be accessed from all modules apart from Personnel and System Manager.

1.5 Personnel module


This module is installed as an integral part of all other modules. It is dedicated to maintaining a centralised database of all personnel, accessible to every other installed module. It is responsible for setting up and maintaining the history of all personnel including Workbench users.

It is highly recommended that you establish your personnel records before beginning to use other modules in the system as the records are referred to and used throughout Workbench.

1.6 System Manager module


This module is installed as an integral part of all other modules. It is a vital area of

Workbench as it handles much of the system's security by granting or revoking access to menu items for individual users or groups of users (Access Templates). After granting access at menu level you may have a further option to determine what rights the user has in a given dialog (eg. read-only, ability to add new records etc.). Overall this gives you extremely tight control over which users can access which part(s) of the system. The dialog used to control access is designed to make this administration task as easy as possible.

An additional benefit of such tight control is the sheer convenience it offers. Presenting users with precisely the menu options they need to do their work is much clearer and less confusing for them than being faced with a whole list of irrelevant (for them) menu options.

The **Workbench Configuration Centre** is also housed within the System Manager module and presents all Workbench globally configurable options in a single dialog. This means that the administrator can locate the required function quickly and will soon become aware of all elements that are configurable.

The Configuration menu also controls the maintenance of user passwords, the organisation of departments and personnel groups, the prioritising of tasks and the menu option allowing the reassigning of responsibilities, especially useful when a user is leaving the company. Locked out users are also restored here.

NB. Wherever reference is made (in Help topics) to the 'system administrator' this includes any user who also has access to the relevant options in the System Manager module.

2 Common features and routines

Workbench uses certain common routines and techniques throughout the system; a familiarity with these will greatly assist your initial explorations of the software.

2.1 Altering the width or order of columns

On certain dialogs in Workbench, mainly **Select** dialogs, you may grab the lines separating columns **in order to make the columns wider or narrower...**

1 Using the mouse, point the arrow at the chosen line within the title bar.

2 When the head of the arrow changes to a small double vertical line with black arrows pointing outwards, click on the line.

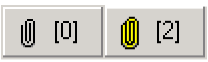
3 Drag the thickened line to its new position and the chosen column width.

It is also possible in some dialogs to arrange the columns in a different order...

1 Click and hold down on the heading of the column you wish to move. A black vertical line will appear at the left hand side of the column.

2 Drag to the right or left until the column jumps to its new position.

2.2 Attachments



The Attachments button appears throughout Workbench and will usually be situated at the top right of a dialog and shows a paper-clip symbol with a number in brackets alongside. When no attached files exist, the 'paper-clip' will be black and the figure will be (0). When attachments exist, the paper-clip is yellow and the figure alongside shows how many attachments there are.

Files may be attached to a number of records in Workbench; these files are stored within the normal Workbench database and are accessible via the record to which they belong. Examples of the usage of attachments might be scanned evidence for NCRs, customer letters in the Customer Care module, external certificates in the Test and Calibration module, feedback forms and certificates in the Training module etc.

Access to attachments relates entirely to the access rights to the parent record. **New**, **View**, **Edit** and **Delete** buttons will be visible and active dependent upon the logged-in user, the status of the parent record and whether attachments already exist. You may only add, edit or delete attachments if you have edit rights to the parent record. Users with **View** rights may view attached files but cannot edit or delete them.

Regardless of the module and routine you are accessing the Attachments Form from, the dialog works the same. The header changes according to the appropriate module / routine - **Complaint Attachment Form**, **Change Request Attachment Form**, **Review Attachment Form** etc.

2.2.1 Adding a new attachment

Files may be attached to many records in Workbench; these files are stored within the normal Workbench database and are accessible via the record to which they belong.

1 Click on the Attachments button in any relevant dialog. The **Attachment Form** will open. The top part of the dialog gives details of the complaint / change request / review etc. that the Attachment relates to.

2 The middle part of the form, Attachments, shows a list of files (if any) already attached to the Complaint / CRQ / Nonconformity etc. To add an Attachment, click on the **New** button. An Attachment Number will be generated by the system and will appear in the bottom part of the form, Attachment Details. The **File Name**, **Attachment Title** and **Extension** fields will then all become mandatory.

Every area where Attachments apply will start from '1' and further Attachments will be numbered sequentially. If an Attachment is deleted there will be a gap in the run of numbers, ie. each Attachment keeps its original number for its 'life-time'.

(The Attachment Number and Attachment Title in the middle part of the form will be entered automatically once the bottom part of the form has been completed and the Attachment saved.)

3 You may also import a Workbench document (subject to required access rights) as an Attachment. These may then be used and edited to highlight changes (when raising a change request) or reasons for rejection (when rejecting a document).

Click on the **Workbench Documents** button to invoke the **Select Document as Attachment** dialog from where you may select the relevant document to attach.

All the fields on the bottom part of the **Attachment Form** will be filled in automatically if a Workbench Document is selected as an Attachment, but all may be amended apart from the *Attachment Number* and the *File Name*. Copy in red will also be added, stating that the Attachment is a copy of a Workbench Document and giving the date and time when the copy was taken. Be aware that the Attachment is a COPY and any subsequent amendments to the actual document still stored within Workbench will not be updated to the Attachment.

IT IS VERY IMPORTANT TO NOTE THAT BY ATTACHING WORKBENCH DOCUMENTS IN THIS WAY, USERS WHO MAY NOT NORMALLY HAVE ACCESS RIGHTS TO THE ATTACHED DOCUMENT MAY NOW BE ABLE TO SEE IT. 'Normal' document access rights will be surrendered once a Workbench document becomes an Attachment - the access rights governing whatever it is attached to, take over control of who may view the copy.

4 If you are not attaching a Workbench document, go to the bottom part of the form, Attachment Details, and enter a mandatory **File Name** and **Extension**. (If you use the **...** button to browse and select the file name, the extension will be entered automatically.) Editing and Viewing Options (if applicable - see Document Control **| Master templates**) will also be entered automatically once an extension has been entered.

5 Give the attachment a mandatory **Attachment Title**; this can mimic the File Name or be something much simpler. The Attachment will be referred to by this title throughout its life.

6 Add any **Notes** and **Save**. The Attachment Number and Attachment Title will be copied up to the middle part of the dialog.

To cancel the new attachment before saving, use the **Cancel New** button.

When a new attachment is added, an appropriate entry will be made to the document's History log.

2.2.2 Modifying an existing attachment

You may only edit or delete attachments if you have edit rights to the parent record.

1 Click on the Attachments button in any relevant dialog. The **Attachment Form** will open. The top part of the dialog gives details of the complaint / change request / nonconformity etc. that the Attachment relates to.

2 The middle part of the form, Attachments, lists existing attached files. Highlight the required Attachment to edit (if more than one) and click on the **Edit** button. Remember to save the changes to the actual Word document after you have edited it and then save again for the Attachments change in Workbench.

If the list of attachments is long, use the Search button to search either Attachment Number (F3) or Attachment Title (F4).

3 To edit Attachment Details, simply highlight the required Attachment (in the middle part of the form) to bring up its details in the bottom part of the form.

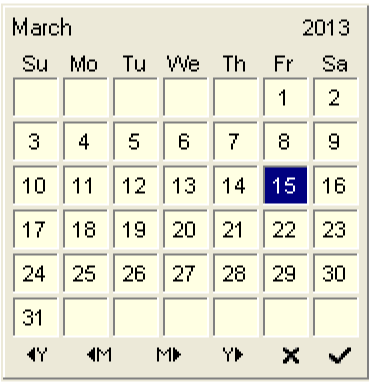
4 Modify the selected attachment / attachment details as required and / or add further notes. Any edits to the actual attached document will not be saved until the **Attachment Form** itself is saved.

The **View** button allows you to view the attached document. The **Delete** button (if present) allows users with edit rights to the parent record to remove an attached document.

Modifying or removing an attachment will write an appropriate entry to the History log of the relevant document.

2.3 Date button

This button gives you a visual aid to plan dates; it displays the current date when first opened.



To alter the date, click on the relevant new day in the main window.

Browse previous months(M) or years(Y) with the bottom left arrows.

Browse future months(M) or years(Y) with the bottom right arrows.

Click the tick to enter the selected date in the box next to the Date button (in the correct format). Click the cross to close without entering a date.

Alternatively you can simply select the correct month and year and then double-click on the required day. The calendar will close and the chosen date will be entered automatically in the box next to the Date button.

2.4 Double-clicking & right-clicking

When first getting to know the module it is worth checking to see if double-clicking will save time in any of the operations. Most Workbench programs support double-clicking in a variety of ways; it is left to the user to decide which of these may benefit their way of working.

Right-clicking on the window of a record sometimes displays a pop-up menu offering an option to print, or direct access to other parts of the module or to other modules.

2.5 Four figure year dates

The Workbench system year dates are always shown as four figure numbers, ie. 2013, not just 13. It will be easier if your version of Windows is configured in the same way; if you are not sure how to do this, please refer to your Windows manual.

NB. If your Windows settings are set to two digit year dates, the system will force you to use four digits when a date is entered.

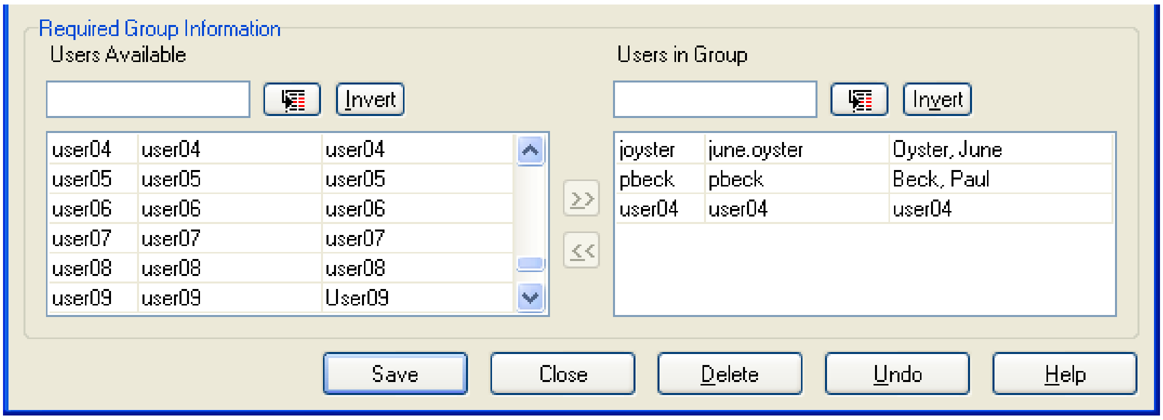
2.6 Grey type and closed fields

When type appears grey rather than black, it signifies that it cannot be edited. Similarly, fields that appear solid or 'closed' cannot be entered.

Both these cases occur when their use would not be appropriate, eg. grey type because a record cannot be altered; closed boxes when the field is not applicable in certain circumstances.

2.7 Groups / Lists

Workbench uses a common routine to add / remove names to / from lists. This routine is used for setting up groups, templates, departments, suppliers etc.



1 In the left hand list (eg. Users Available), highlight the name(s) you wish to add to the selected right hand list (eg. Users in Group). More than one consecutive name can be highlighted at the same time using the keyboard **Shift** key; highlight more than one name not listed consecutively, using the **Ctrl** key.

2 Click on the central add **>>** button and the name(s) will transfer to the right hand side.

Alternatively, simply double-click on the required name(s) to move them from one side to the other.

Where the list of names is long, you may use the Search button to search for known personnel. If you wish to select the majority of names from a list, use the Invert button.

To remove selected names, highlight in the right hand list and click on the central remove **<<** button (or double-click).

2.8 Invert button

There are many situations in Workbench where you may wish to select one or more records from a list of available ones. For instance, you may be asked to select all users in a specific group from a list of all available users. Selecting such a group is simply a matter of highlighting the names you require.

The Invert button reverses the selection you have made, ie. it 'de-selects' the highlighted records and highlights the rest. This is very useful when you wish to include the majority of a list - you can select a few records on an exclusion basis and then quickly invert the list.

Where appropriate, you may select a consecutive group of names by depressing the keyboard **Shift** key whilst making the selection; names which do not fall consecutively can be selected at the same time using the keyboard **Ctrl** button.

2.9 Mandatory fields

Certain fields throughout Workbench are essential or mandatory; ie. until they are completed you will not be able to save the record you are working on.

Such fields are shown in blue and are underlined, giving you an immediate visual indication that they are compulsory eg. **Login to which database?** and **Login** in the **Log on to Workbench** dialog.

Until all mandatory fields are completed, **Save** or **OK** buttons will be disabled.

2.10 Screen display & keyboard shortcuts

There are several ways to 'personalise' your screen and navigate your way around the system.

- You may configure the main Workbench screen by moving different menu bars - to do this grab the vertical line on the left of any individual menu bar and drag the bar to its new position. Moves are saved locally so that an individual user's set-up will be retained.
- On every menu title in each module there is an underlined letter; this is the keyboard letter to press in order to invoke that menu. For example, the letter **F** in all **File** menus is underlined. Press the keyboard **F** (or **f** - it is not case sensitive) to open the **File** menu. In the Document Control module, the **D** is underlined in the **Documents** menu signifying that this is the key to press to open the **Documents** menu.

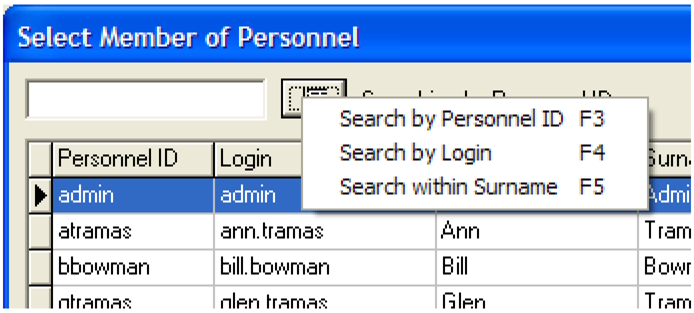
  You may then use the keyboard 'up' and 'down' arrows to select the menu option you require and then hit the **Enter** key to open the dialog, In this way you may move around the modules, menus and menu options without having to use the mouse.
- A right-click menu on the screen enables you to show or hide the Calendar button, Menus, Modules, Notifications button, Speedbar (Speed buttons), Tasks button and/or Web Page

independently. **NB**. There are several workflow settings covering the usage and display of web pages, see Personal workflow settings (System Manager & Personnel Administration User Guide).

2.11 Search button

The search button is probably the single most widely-used feature throughout Workbench. Its purpose is to allow you to browse easily through records and locate the one you are seeking by whatever methods are appropriate to that information.

These search options will differ depending on the kind of information you are searching through. For example, searching for personnel offers searches by Personnel ID, Login or within Surname; simply use whichever is most convenient.



Right clicking on a Search button displays the search options available in a ‘pop up’ menu.

Each option on the menu has a keyboard shortcut; this may be quicker to use as you become more familiar with the system and its search options.

Simply left clicking a Search button defaults to the search method last employed.

To locate a specific record or set of records you must first key in the characters you wish to search on in the selection box to the left of the Search button. Then use the search method required from the menu (or the function key equivalent). For instance, typing in ‘Hard’ on a personnel search and choosing F5 (Search within Surname) will return all users with the characters ‘Hard’ within their surname, eg Hardy, Harding etc. If no matching records are found, a message is displayed to this effect.

Most search types look for exact matches to their respective fields. However some, as the example above, look for the string anywhere within the field. A good example of this is the search for a document ‘within Title’. Here the system looks for whatever you have keyed in anywhere within the document’s title. Thus a search for ‘procedure’ will find any document with that word in its title. This can be extremely useful when you are unsure of the exact wording of a document title.

Unlike the other search types, a search within a field is not case sensitive. The above example therefore will pick up documents with ‘Procedure’ or ‘PROCEDURE’ embedded somewhere within the title.

NB. To ensure that the whole list of records appear in any search dialog, the search field alongside the search button must be cleared before starting a new search. To do this, highlight any text there, delete it and then click on the Search button or activate one of the keyboard shortcut keys.

2.12 Search routines

The method for locating personnel records is a good example of the generic search routines found throughout Workbench. The **Select User**, **Select Complaint Type**, **Select Tester** dialogs etc. use the same routine. On certain Select dialogs there is an additional check box:-

- in **Select Member of Personnel** the extra check box determines whether the records returned by the search should include Leavers or be limited to just current employees. The system defaults to include only current employees, but Workbench does not delete leaving personnel; they are marked as having left and their records retained for historical purposes. The records are therefore available for this type of search should you need them (see example below).
- in **Select Departments**, **Select Document Categories** and **Select Document Types** (when accessed from the Settings menu) there is a check box at the top of the dialog that allows records that have been hidden to be shown. By default, hidden records will not be shown in search grids. To reveal all records, including those that have been hidden, click on the check box marked Show *hidden Department* (or Category etc.)

Searching for a record in any Select dialog (eg. Select Member of Personnel)

1. From the **Record** menu in the **Personnel** module, choose **Personnel**. The **Select Member of Personnel** dialog will appear.
2. Anyone who has a leaving date entered in their records will not, by default, be included in the search. If you wish to include Leavers, please check the box - *Include personnel who have left.*
3. Select the required member of personnel (or Complaint Type, Category etc. if appropriate) using one of the following three methods:-
   - use the Search button to find a known member of staff (Complaint Type, Personnel ID etc.)
   - highlight the required name (scroll if necessary) and click **OK**
   - double-click on the required name.

The chosen record will then open. There is normally a **New** button on **Select** dialogs, allowing you to set up new records. However records for personnel must be set up in the Personnel module.)

2.13 Sorting and ordering

The symbols shown on the column headers below show which column is controlling the sort - and whether this is in ascending or descending order. The column that has an arrow and one short horizontal line alongside (as opposed to two short horizontal lines) is the one controlling the sort and the arrow indicates whether the order is ascending or descending. In the example shown below, the grid would be sorted by the Search Code, alphabetically from A to Z.

	ID	Search Code	Name	Course	Type	Start Date
▶	5	allnewstaf	All new staff	First steps		12/05/2008
	1	firstaidat	First Aid at Work	First Aid at Work	F_AID	24/07/2008

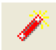
To move the sort to a different column, click on the required column header and click again to toggle between ascending and descending order. In the following example the grid would be sorted by the Name column, alphabetically Z to A.

	ID	Search Code	Name	Course	Type	Start Date
▶	8	qualitywor	Quality Workbench	Quality Workbench	Management	15/05/2008
	7	producttes	Product Tester	Product Tester	IT	07/04/2008

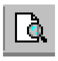
2.14 Speed buttons

The most commonly used menu items in each module have speed buttons. These are shown on the main toolbar for each module and alongside the relevant menu item. If a user does not have access to a menu item that has a speed button, they will not be able to see the speed button.

Speed buttons used in the Training module are shown below.

 Identify Training Requirements

 Identify Training Gained

 View Profile

 Schedule Course

 Complete Course

3 Setting up basic information

Much of the information required to complete dialogs throughout the module originates in the **Settings** menu. Details of skills, courses, qualifications, suppliers and contacts must be set up here first and then selected (using the Search button) on the appropriate dialog. None of this information can be created or edited ‘on the fly’.

The module recognises the need for an individual’s training requirements to be changed and to be added to, so all dialogs in this menu allow items to be created, viewed, edited and deleted (where appropriate).

3.1 Personnel records

The **Personnel | Details** menu item is used to select specific members of staff either to view/update their personnel records or to ascertain who has attended a selected course, attained a specific skill or obtained a particular qualification. When a member of staff is selected here, their personnel record, directly from the Personnel module, is shown (providing that you have the appropriate access rights). **NB**. For obvious reasons, it is advisable to monitor access to this option carefully.

Only users who have been granted access to the **Personnel** module will have access to the **Personnel** menu in the Training module.

Searching for specific personnel

1 Select **Personnel** from the main **Training** menu.

2 Choose **Details** from its menu and the **Select Member of Personnel** window will appear.

3 Select a known member of staff (using the Search button if required.) If the *Hide 'admin' account from System and Personnel modules* workflow setting is checked, then the 'admin' record will be excluded from the Personnel list here (unless you are logged in as admin).

4 Filter the personnel list if required (using Search buttons) to show only users with the relevant training, ie. users who have attended a specific course, attained a certain skill or obtained a specified qualification.

If you filter by **Qualification Obtained** the two check boxes below will then be enabled (if appropriate). Check the top one to exclude deleted qualifications. Check the bottom one to exclude out-of-date qualifications.

Provided that you have the required access rights, you may view or edit personnel record(s) of any member of staff shown in the above list. To do this, highlight the chosen name and click **OK** or simply double-click on the chosen name - you will then gain direct access to personnel records maintained by the Personnel module.

See Creating personnel records in the Personnel module for further information.

Editing personnel records

Editing personnel records can be done at any time by users with appropriate access rights. Amendments to all personnel details will be logged on the **History** page of their record, giving the original detail and who it was changed by.

Amendments are normally made via the **Personnel** module, but users with appropriate access to the **Training** module (if installed) may also edit personnel records using the **Personnel | Details** routine.

1 Call up **Personnel | Details** in the **Training** module.

2 Select the member of personnel whose record you wish to edit (see Search routines). If the *Hide 'admin' account from System and Personnel modules* workflow setting is checked, then the 'admin' record will be excluded from the Personnel list here (unless you are logged in as admin).

3 Amend any editable details on **Edit Member of Personnel | Edit User**.

4 **Save**.

Users with appropriate access rights may also amend Analysis fields on the **Analysis** page and/or Personal workflow settings on the **Workflow Settings** page.

All changes to either page will automatically be logged on the **Personal History** page.

3.1.1 Titles

The **Create Staff Title** dialog allows you to record any kind of personnel title (rather than just Dr. Mr. Mrs. Miss. etc.). Type in a mandatory **Description** of the new title, **Save** and **Close**.

If you want to edit an existing **Staff Title** this must be done via the **Settings | Titles** menu option in the **Personnel** module. Double-click on the Staff Title you want to edit, to invoke the Edit Staff Title dialog. You may also delete Staff Titles in the Personnel module providing that they have not been used in any record.

3.2 Skills

Specific skills that may be required by different personnel throughout a company are recorded in **Settings | Skill**. This dialog allows skills to be created, viewed, edited and deleted. Details of skills may also be viewed by right-clicking on the relevant skill within the **Current Training Requirements** dialog (see **Training | View Training Requirements**).

Recording a Skill

1 Select **Settings** from the main **Training** menu.

2 Choose **Skill** from its menu and the **Select Skill** dialog will appear.

3 Click on **New**.

4 Give the Skill an **ID** and **Description** (mandatory fields). The **Search Code** will follow the Description (up to ten characters without spaces) but may be changed manually; simply delete and type in a new Search Code.

5 Add any **Notes**.

6 **Save** and continue to insert further new skills or **Close**.

Editing or deleting a Skill

1 Select **Settings** from the main **Training** menu.

2 Choose **Skill** from its menu and the **Select Skill** dialog will appear.

3 Select the appropriate skill using any method described below:-

- by double-clicking on the appropriate skill (scroll if necessary)
- by highlighting the appropriate skill and clicking **OK**

- using the Search button. Type in the Skill ID or Search Code (if known) or part of the Description. Then right-click on the Search button and select the corresponding search method or use the keyboard shortcut - Skill ID (F3), Search Code (F4) or within the Description (F5).

4 When the **Edit Skill** dialog appears you may edit the record as necessary. Descriptions of skills and notes attached to them may be edited but a **Skill ID** cannot be altered.

NB. Once a Skill has been used in any training record, that Skill cannot be deleted.

3.3 Course types

Courses may be of differing types such as Health and Safety, Maintenance etc. Where courses are specified as being of a particular Type, the module makes provision for these to be grouped together for filtering and reporting purposes.

The **Settings | Course Type** dialog allows course types to be created, viewed, edited and deleted.

NB. Ampersands (&) should be avoided when inputting any **Course Type** or **Course** - use the full word 'and' or /.

Recording a Course Type

1 Select **Settings** from the main **Training** menu.

2 Choose **Course Type** from its pull-down menu. The **Select Course Type** window will appear.

3 Click on **New**.

4 Give the **Course Type** a **Description** (this is mandatory). The **Search Code** is completed automatically and follows the Description (up to ten characters without spaces). It may be changed manually; simply delete and type in a new Search Code.

5 Add any **Notes**.

6 **Save** and continue to insert further new types or **Close**.

The course types that you have entered will now appear alphabetically in the **Select Course Type** window.

Editing or deleting a Course Type

1 Select **Settings** from the main **Training** menu.

2 Choose **Course Type** from its pull-down menu. The **Select Course Type** window will appear.

3 Select the required course type using any method described below:-

- by scrolling (if necessary) and double-clicking on the appropriate course type
- by highlighting the appropriate course type and clicking OK
- using the Search button. Type in the Search code (if known) or part of the Description. Then right-click on the Search button and select the corresponding search method or use the keyboard shortcut - Search Code (F4) or within the Description (F5).

4 When the **Edit Course Type** dialog appears, you may edit or delete as necessary.

NB. All parts of the dialog may be edited but once a course type has been specified as part of a training record, it cannot be deleted.

3.4 Courses

Details of courses and any pre-requisites for prior training that a specific course may demand are set up in **Settings | Course**; this allows courses to be created, viewed, edited and deleted. They may also be viewed by right-clicking on the relevant course within the **Current Training Requirements** dialog and in appropriate entries within a **Training Profile**.

Associated documents may be attached to a course using the licensed area, Document Training; both the Document Control and Training modules must also be licensed. When any document attached to a course is about to be issued, the relevant course may be scheduled, at which point the document will be marked as 'Undergoing Training' and cannot then be issued until all required attendees have completed the course. It is possible to lock the document on more than one scheduled course.

There are three types of basic course:-

- one that simply requires attendance and does not generate a qualification
- one that refreshes a qualification (Follow Up Course)
- one that gives a qualification on satisfactory completion.

Follow-up courses will have a specific time limit placed on them when first setting up the Qualification (in **Settings | Qualification**). This will register an 'overdue date' in training profiles and qualification records when appropriate.

Setting up a new Course

Editing or deleting a Course

1. Select **Settings** from the main **Training** menu.
2. Choose **Course** from its menu; the **Select Course** window will appear.
3. Select the relevant course using any method (see Editing or deleting a skill); the **Edit Course** dialog will appear.

All parts of the dialog may be edited apart from the Course **ID**. A course cannot be deleted once it has been specified as part of a training record.

If the list of associated documents on the **Documents** page is long, use the Search button to narrow the search. Documents may appear as PDFs or in their original format depending on the configuration of the individual document's workflow settings.

A **History** page, recording all changes made to the course (see below) is now part of the dialog.

History page

The History page tracks all changes made to a scheduled course. Entries may be filtered using the **Filter** button at the top right of the page. The **Filter History Display** dialog is self-explanatory - selected items in the list will be displayed, those that are not highlighted will be not be shown.

A red 'warning' at the bottom of the History page will show whether the list has been filtered. A **Clear** button next to the **Filter** button allows you to clear History filters quickly without having to re-open the **Filter** dialog and manually select all entries.

NB. For further information on Document Training, see Scheduling a new course.

3.4.1 Setting up a new course

1. Select **Settings** from the main **Training** menu.
2. Choose **Course** from its menu and the **Select Course** window will appear.
3. Click on **New**.
4. In the **Create Course** dialog give the Course an **ID** and **Name** (mandatory fields). The **Search Code** will follow the Name but can be changed manually.
5. Attach any files to the course specification, if required, using the Attachments button. Existing attachments may also be viewed, edited or deleted by users with appropriate access rights.
6. Select a **Type** from the drop-down menu, if required.
7. If the course is a *Follow Up Course* and you tick this box, the qualification to be refreshed will become a mandatory field.
8. If a qualification is provided at the end of the course you can enter this in the **Qualification Provided** field. As this can only be done using the Search button, a list of available qualifications must first be set up in **Settings | Qualification**.
9. Add any **Notes**.
10. Add information required on the **Prerequisite**, **Skills** and/or **Documents** pages (see below).
11. **Save** and continue to set up further new courses or **Close**.

Prerequisite page

You must complete the mandatory fields on the **Course** page before accessing this page; then you may name any other course to be undertaken before attending the currently selected one. You may also make Notes.

Skills page

You must complete the mandatory fields on the **Course** page before accessing this page. Then you may select the skills to be provided by the course. To select specific skills from the list available on the left hand side...

1. Highlight the chosen skill(s). It may be quicker to use the Search button if the list is long.
2. Click on the central **>>** button to add highlighted skills to the right hand side of the window. De-select using the central **<<** button or simply double-click on the skill(s) to transfer.

   To select more than one consecutively listed skill, depress the **Shift** key whilst selecting; use the **Ctrl** key to select multiple skills that are not listed consecutively. If selecting the majority of skills from a list it may be quicker to use the Invert button.

Documents page

You must complete the mandatory fields on the **Course** page before accessing this page. Then you may add documents to be associated with this course.

The Documents page of the **Create Course** dialog allows you to:-

- add a new document to associate with this Course
- view an existing document already associated with this Course
- view the attributes of a document already associated with this Course
- remove an associated document.

Adding an associated document

1 In the **Create Course** dialog (Settings | Course) select the **Documents** page after ensuring that you have a Course identified.

2 Click on the **Add** button.

3 In the **Associated Documents** dialog, select the document(s) you wish to associate with the selected Course (see Searching for documentsin the Document Control User Guide).

4 The selected document(s) will now appear on the **Documents** page of the **Create Course** dialog where you may **View** a highlighted document or its **Attributes**. **NB**. Documents may appear in their original format or as PDFs depending on the configuration of the document's workflow settings. Use the **Remove** button to delete document(s) no longer required to be associated with the Course.

When the Course has been set up as you wish, click on **Save**.

3.5 Qualifications

Qualifications gained by different personnel or required for specific jobs within a company are initially described in **Settings | Qualification**. This dialog allows qualifications to be created, viewed, edited and deleted. They may also be viewed by right-clicking on the relevant qualification within the Current Training Requirements dialog and in appropriate entries within a Training Profile.

Qualifications (as defined in this module) may be of three basic types:-

- one that is gained for life - eg. degree, diploma
- one that only remains valid for a set time
- one that only remains valid for a set time and can be refreshed (for example, First Aid certificates). The date by which the qualification should be refreshed is automatically logged in the training record(s) of relevant member(s) of staff.

Recording a Qualification

1 Select **Settings** from the main **Training** menu.

2 Choose **Qualification** from its menu and on the **Select Qualification** window, click **New**.

3 Give the Qualification an **ID** and **Description** (mandatory fields). The **Search Code** will follow (up to ten characters without spaces) but may be changed manually; simply delete and type in a new Search Code.

4 Complete the **Valid For** fields if appropriate. (Values in the combo box can only be selected after you type in a number.)

5 If the specified Qualification can be refreshed in the future, tick the relevant check box.

6 Add any **Notes**.

7 **Save** and continue to input further new qualifications or **Close**.

Editing or deleting a Qualification

1 Select **Settings** from the main **Training** menu.

2 Choose **Qualification** from its pull-down menu. The **Select Qualification** window will appear.

3 Select the relevant qualification using any method described in Search routines.

4 Edit where required (apart from the **ID** that cannot be amended).

Details of any **Follow-up Course** will be shown if you ticked the relevant box when setting up the course that offers this qualification.

5 You may add further **Notes** if required.

6 **Save** when you have edited or click on **Delete** to delete.

NB. Only Qualifications that have not been specified as part of a training record can be deleted.

3.6 Review type

It is likely that most training requirements will become apparent as a result of personnel reviews, such as appraisals.

The module provides for different types of user-definable reviews to be set up in **Settings | Review Type**; this dialog allows review types to be created, viewed, edited and deleted.

NB. **Review Type** is a mandatory field when using the Training Requirements wizard.

Recording a Review Type

1 Select **Settings** from the main **Training** menu and choose **Review Type** from its pull-down menu.

2 In the **Select Review Type** dialog, click on **New**.

3 Give the **Review Type** a **Description** - this is mandatory. The **Search Code** will follow automatically but can be changed.

4 Add any **Notes**.

5 **Save** and continue to input further new review types or **Close**.

Editing or deleting a Review Type

1 Select **Settings** from the main **Training** menu.

2 Choose **Review Type** from its pull-down menu. The **Select Review Type** dialog will appear.

3 Select the relevant **Review Type** using any method described in Search routines. The **Edit Review Type** dialog will appear.

All parts of the dialog may be edited but a review type cannot be deleted once it has been used in a training record.

3.6.1 Reviews

The **Review Details** Notes that appear when right-clicking an entry on the **Overall** page of a staff member's **Training Profile** originate from the **Training Requirements Wizard**.

The original notes are made on the second page of the Training Requirements Wizard when also entering a mandatory Review Type (the Notes are not mandatory).

3.7 Course location

Training courses may be held in a variety of places. The **Settings | Course Location** dialog allows differing course locations to be created, viewed, edited and deleted.

Setting up a Course Location

1 Select **Settings** from the main **Training** menu and **Course Location** from its pull-down menu.

2 In the **Select Course Location** dialog, click on **New**.

3 Give the location a **Description** - this is mandatory. The **Search Code** will follow automatically but can be changed.

4 Add any **Notes**.

5 **Save** and continue to input further new locations or **Close**.

Editing or deleting a Course Location

1 Select **Settings** from the main **Training** menu.

2 Choose **Course Location** from its pull-down menu. The **Select Course Location** dialog will appear.

3 Select the relevant course location using any method described in Search routines. The **Edit Course Location** dialog appears.

All parts of the dialog may be edited but once a specific course location has been identified in any training record, that Location record cannot be deleted.

3.8 Result description

Descriptions of skill / course / qualification results may be user-defined to fit in with your company's requirements and ways of working. The **Settings | Result Description** dialog allows result descriptions to be created, viewed, edited and deleted.

Result descriptions may be used when entering course results on the Complete Scheduled Course dialog. As they cannot be entered 'on the fly' they must first be set up here and then selected, if required in the **Course Results** dialog.

Defining a Result Description

1 Select **Settings** from the main **Training** menu.

2 Choose **Result Description** from its pull-down menu. The **Select Result Description** dialog will appear.

3 Click on **New**.

4 Give the Result a **Description** (this is mandatory). The **Search Code** will follow automatically but can be changed.

5 Add any **Notes**.

6 **Save** and continue to input further new result descriptions or **Close**.

Editing or deleting a Result Description

1. Select **Settings** from the main **Training** menu.
2. Choose **Result Description** from its pull-down menu. The **Select Result Description** dialog will appear.
3. Select the relevant description using any method described in Search routines. The **Edit Result Description** dialog will appear.

All parts of the dialog may be edited but if a specific result description has been used in any training record, that description cannot be deleted.

3.9 Suppliers

In some cases, training courses may be provided by external suppliers (see Scheduling courses); provision is therefore made to record full details of suppliers and contacts - name, address, telephone/fax numbers etc.

The same supplier records are used by the Audits, Customer Care, Nonconformities, Training and Test & Calibration modules. If you are denied access to this menu option in any module, you will automatically be denied access in all other modules.

3.9.1 Selecting suppliers

Supplier records may be set up in several modules; lists of Suppliers will include suppliers recorded in any other module that contains this menu item. If you are denied access to suppliers in any module, you will automatically be denied access in all other modules.

Selection of suppliers uses a routine common throughout Workbench (see Groups / Lists for help).

1. Click on the **Suppliers** page (in **Settings | Product** the Suppliers page will only become active after you have completed the mandatory fields and selected the *Externally Supplied* radio button on the **Product** page).
2. Select suppliers by moving them from the left hand side of the window to the right.
3. When you have selected all the appropriate suppliers, **Save** and **Close** or continue to input other products and select suppliers.

If you need to set up new suppliers, close the **Select Product** dialog to return to the main menu. Then see Setting up new supplier records. If selecting suppliers via the **Search** button and the **Select Supplier** dialog, see Search routines for help if required.

3.9.2 Setting up new supplier records

The same supplier records are used by the Audits, Customer Care, Nonconformities, Training and Test & Calibration modules. If you are denied access to this menu option in any module, you will automatically be denied access in all other modules.

Setting up a new supplier record

1. Select **Settings** from the main menu and choose **Suppliers** from its pull-down menu. (**NB**. In the Test and Calibration module only, Suppliers may be set up 'on the fly' from the **Equipment Register** dialog.)

2 In the **Select Supplier** dialog click on **New**.

3 The **Supplier ID** and **Name** are mandatory fields. The **Search Code** will automatically follow the Name but can be changed. The Supplier ID cannot be edited in any way, once saved.

4 Enter as many or as few other details as are relevant for the supplier - on all pages.

5 Enter any **Notes**.

6 **Save**.

All suppliers information (apart from Supplier ID) may be edited at any time in the future using the **Suppliers** menu option in the **Settings** menu only.

Analysis page

User-definable analysis displayed on the **Analysis** page is initially set up in the **Settings** menu (**User Defined Analysis | Suppliers**). Analysis categories displayed here can be attached to the currently selected supplier in the following ways:-

- select (or de-select) check box categories by clicking in them
- select predefined values from the drop-down list in combo boxes
- add values 'on the fly' using additive combo boxes (or select from a predefined value in the drop-down list). Any new value set up here will be added to the drop-down list and available for future selection.
- enter a 'one-off' value using a free text box.
- enter a date or date and time (using the Date button if preferred).
- enter currency and/or numeric fields (up to the specified number of characters).

You can select only one value per field (in drop-down lists or combo boxes); boxes should be left blank if neither the field nor any of its values apply.

When you have completed the page, click on **Save**. If no user defined analysis is applicable move on to the next page.

Contacts page

Specific contacts within firms of suppliers can be recorded on the **Contacts** page. See Recording new contacts.

3.9.3 Recording new contacts

Specific contacts within firms of suppliers can be recorded on the **Contacts** page (**Settings | Suppliers**).

1 Select the **Contacts** page in the **Create Supplier** dialog (after specifying a **Supplier ID** and **Name** on the **Supplier** page); details of contacts already recorded will be listed here.

2 To enter details of a new contact, click on **New**.

3 **Surname** is the only mandatory field. You may enter as many or as few other details as you wish.

4 Enter any **Contact Notes** if appropriate.

5 Click on the **Save** button to save the contact and continue adding further new contacts or **Save** and **Close**.

The Contact(s) you have just recorded will now appear in the list on the first **Contacts** page window in the **Create Supplier** dialog.

6 Click on **Save** and close all dialogs.

See also: Editing details of suppliers and/or their contacts

3.9.4 Editing details of suppliers and/or their contacts

1 Choose **Supplier** from the **Settings** menu; the **Select Supplier** window will appear.

2 Select the appropriate supplier, edit any details on the **Supplier** and/or **Analysis** pages (apart from the **Supplier ID**) and click on **Save**.

3 Click on the **Contacts** page to edit details of contacts.

4 Highlight the appropriate contact and click **Select** (or double-click on the required contact).

5 Edit the contact's details, click on **Save**.

A contact's records may only be deleted (using the **Delete** button) if they are not used in any supplier records in any installed module.

6 Save in the **Edit Supplier** dialog and then **Close** the **Select Supplier** dialog.

See also: Recording new contacts

3.10 User definable analysis categories

The ability for you to determine your own analysis categories and their associated values is present throughout Workbench and is a very powerful customisation feature. The User definable analysis element is licensed separately and, if purchased and installed, UDA will always be set up in the **Settings** menu of each individual module. Wherever a module offers more than one type of analysis category, this is offered from a walk-right menu.

Different categories must each be set up separately, but this is done in exactly the same way; the various categories then become available for selection in appropriate **Analysis** dialogs.

The same user-defined analysis records are referenced by all installed modules that use UDA; for example, the same Suppliers UDA will be used in Audits, Test and Calibration, Training and in NCRs.

The Training module enables you to define separate analysis categories for Courses and Suppliers.

Analysis can be categorised in eight different ways:-

- the Drop Down List gives a set of predefined values for a given attribute. This list is used whenever you wish to associate a set of predefined values with a category. These might be used to attribute, say, a specific cause to a nonconformity, chosen from a drop-down list of alternatives when the nonconformity is reported.
- the Check Box offers a straightforward on/off toggle for attributes that either apply or do not apply. An example might be 'Inform Health and Safety?'. You then simply check or uncheck this box as appropriate when entering records.
- an Additive Combo box lists certain predefined values that may be added to 'on the fly'. These values are produced as a drop-down list and any value added in this way becomes 'global' and is added to the list for future use.

- the Free Text box. This allows you to add specific text (up to 255 characters - user definable) that may apply to a supplier or course on a one-off basis (eg. the name of an external reviewer).
- Date Only. Choose this category to add an analysis field that will allow you to attach a specific date to the record. The field will automatically incorporate a date button.
- Date and Time. Choose this category if you wish to add analysis fields that will allow you to attach a specific date and time to the record. The field will automatically incorporate a date button.
- Currency. Choose this category to add a currency analysis field (eg. price in sterling, dollars, lire etc.). The field can be sized to allow for up to 20 characters; you may also stipulate the number of digits after the decimal point.
- Numeric. Choose this category to add a numeric analysis field. The field can be sized to allow for up to 20 characters; you may also stipulate the number of digits after the decimal point.

See also: Setting up user defined analysis and Selecting user defined analysis

3.10.1 Setting up user defined analysis

User-definable analysis can only be set up in the **Settings** menu; the required analysis categories must then be selected on **Analysis** dialogs whenever appropriate. The process of setting up analysis categories is identical for all modules.

Creating user defined analysis fields and values

1. From the **Settings** menu, choose **User Defined Analysis**.
2. In modules where there is a choice of user defined analysis, choose one from the walk-right menu. The **Analysis Maintenance** dialog will open.
3. To enter a new **Analysis Field** (of any type) click on the **New Field** button (left window).
4. Type in a new **Analysis Field** where the cursor is blinking - field labels may contain up to 255 characters.
5. Press the return key to enter another analysis field or continue to define the type and values (if appropriate) for the current field.
6. With the required analysis field highlighted, select the Field Type ‘radio’ button. For all analysis fields except Drop Down List or Additive Combo this completes the input required.
7. To define field values for Drop Down Lists or Additive Combos, click the **New Value** button (on the right hand side of the window).
8. Enter the initial **Field Value** for the selected analysis field.
9. Press the return key to save the new **Field Value** and prepare to enter another. Repeat this process until all the relevant entries have been made in the *Values* field.
10. Highlight another **Analysis Field** in the left hand side of the window to add values to if required; click on **Save** when all fields/values have been entered.

The **Maximum Field Length** for analysis fields defaults to 255 characters; currency and numeric fields default to 20 characters maximum; date/time fields are pre-defined and automatically incorporate a date button; check boxes offer a simple on/off choice. To alter a maximum field length, simply delete the shown number and type in the preferred length. The **Number of Digits after a Decimal** point may also be specified (where appropriate).

Fields and/or values may only be edited or deleted if they have not been ‘attached’ to a record.

However, a check box near the bottom of the left hand side of the dialog, *Hide Field?*, allows you to 'hide' any highlighted analysis field. As hidden fields can't be seen they can no longer be selected on **Analysis** pages, but previously stored information may still be used for reporting purposes.

You may enter as many different fields and values as you wish and relevant fields may have as many values attributed to them as required. If the number of defined categories fills up the screen, a scroll bar will appear allowing you to scroll down and continue inputting information. Fields and / or values may only be edited or deleted if they have not been 'attached' to a record.

The ▲ Up and ▼ Down buttons are used to navigate the lists of fields and values and to determine their order.

NB. Please avoid using ampersands (&) in this dialog; spell out the word in full where necessary or use a back-slash - eg. Health and Safety or Health\Safety.

3.10.2 Selecting user defined analysis

User defined analysis categories originally set up in the **Settings** menu are available for selection on **Analysis** pages. **NB**. In the Document Control module, user defined analysis is classed as a Document Attribute (Document attributes / Analysis page).

Selecting user defined analysis

1 Click the **Analysis** page on the main dialog.

2 Select appropriate predefined values from drop-down lists.

3 Relevant check boxes should be checked or un-checked.

4 In additive combo boxes you may select from a predefined value in the drop-down list or add a new value. Any new value set up like this will be added to the drop-down list and available for future selection.

5 In free text boxes, enter a one-off value that will apply to the currently selected record only.

6 Enter a date or date and time (using the Date button if preferred).

7 Enter currency and/or numeric fields (up to the specified number of characters).

You can select only one value per field (in drop-down lists or combo boxes); boxes should be left blank if neither the field nor any of its values apply.

8 When you have completed the page, click on **Save**.

4 Training wizards

There are two 'Wizards' in the module; both allow you to input different types of information in one dialog. The Identify Training Requirements wizard identifies training requirements for a member of staff; existing requirements can be modified and new requirements can also be added. The Identify Training Gained wizard allows you to add training gained for one or more member(s) of staff.

Navigation through the Wizards is explained on each window, so only brief notes are given here.

4.1 Training requirements wizard

The purpose of this Wizard is to allow you to identify, modify and/or add to an individual's current training requirements using a few easy steps:-

- introduction and explanation of the wizard
- selecting the appropriate member of staff
- modifying / adding to current courses
- modifying / adding to current skills
- modifying / adding to current qualifications
- saving the amendments.

Introducing the Wizard

1 Select **Training** from the main **Training** menu.

2 Choose **Identify Training Requirements** from its pull-down menu.

3 Read the instructions on each window in turn to ensure that the inputting of information is trouble-free.

   As you work through the Wizard you will need to enter information using Search buttons and drop-down menus. This information originates from the Settings menu and will still have to be set up there before using the Wizard.

4 Click on **Next >>** to proceed.

Selecting a member of staff

4.1.1 Selecting a member of staff

The second window in the Training Requirement wizard requires you to select the member of staff whose training requirements you wish to update and the type of review.

1 Read the instructions at the bottom of the window.

2 Select a **Member of Staff** using the Search button.

3 Select the **Review Type** from those listed in the drop-down menu; these originate in the **Settings** menu - see Review type.

4 Add any **Notes** if required. These review notes will later be viewable in the **Training Profile** by right-clicking on the relevant entry.

5 Click Next >> to proceed.

You will only be able to proceed after you have completed the two mandatory fields. At this time you will also be able to view the current training profile for the chosen member of staff by clicking on the **Training Profile** button. If you do this, their **Training Profile** will appear...

The **Overall** training history is shown, by default, in chronological order on the main page; select the relevant radio button to re-order the entries by Description or Date Entered. The other three pages show **Course** / **Skill** / **Qualification** histories and there are filters on each to aid selection of the appropriate record. For full details, see Viewing a Training Profile.

See also: Modifying or adding training requirements

4.1.2 Modifying or adding training requirements (Wizard)

After you have chosen a member of staff whose training requirements you wish to modify the next three windows have similar content and purpose - one deals with Courses, one with Skills and the final one with Qualifications.

The example shown below refers to **Current Course Requirements**, but the windows for **Skills** and **Qualifications** work in exactly the same way.

1 Read the text at the bottom of the window.

2 To modify an existing course requirement (if one exists), use one of the three methods listed below to select the relevant course.

- by scrolling (if necessary) and double-clicking on the appropriate course
- by highlighting the appropriate course and clicking **Select**
- using the Search button. Enter the Course ID (if known) or part of the Course Name or the due date of the course. Then right-click on the Search button and select the corresponding search method or use the keyboard shortcut - Course ID (F3), within the Course Name (F5) or Due Date (F6).

3 Modify details of the course and **Save** or delete the requirement.

4 If you wish to add a further course requirement for the selected member of staff, click on the **New** button to view the **Record Course Requirement** window (see below). If the requirement is for a further skill or qualification, click on **Next >>** to move on to the relevant window.

To view the current training history of the member of staff, click on the Training Profile button.

Adding a further training requirement

1 In the **Record Course Requirement** window, select the mandatory **Course** to be added to the current training requirement, using the Search button.

2 Select a **Date Due** by which the course should be completed (if required).

3 Add **Notes**.

4 **Save** and continue entering further requirements... or **Close** or...

5 Click **Next >>** to proceed and to enter modifications to skills and/or qualifications.

If you **Close** you will be taken back to the **Current Course Requirements** window where the new requirement(s) will now be listed. These may be modified at any time.

See also: Saving the modified training requirement

4.1.3 Saving the modified training requirement

When each of the three **Current Training Requirement** windows are complete, the final window will appear.

1 Read the instructions.

2 If you wish to abandon the modifications, click on the **Close** button and don't save the changes.

3 Otherwise, click on the **Finish** button and the modifications will be saved.

The **Training Profile** will now include the modifications just made.

See also: Where to view information entered using the Wizards

4.2 Training gained wizard

The purpose of this Wizard is to allow you to add training gained for one or more member of staff in a single dialog using a few easy steps:-

- introduction and explanation of the wizard
- selecting the member(s) of staff
- modifying courses attended, skills attained, qualifications gained
- saving the changes.

If you select more than one member of staff, all the selected members must have attended the same course, attained the same skill and/or gained the same qualification. You may, however, record a different result for each member of staff after attending the same course.

If different courses and skills etc. have been achieved you may still enter them using the **Training Gained Wizard** but each one must be entered individually.

Introducing the Wizard

1 Select **Training** from the main **Training** menu.

2 Choose **Identify Training Gained** wizard from its pull-down menu.

3 Read the instructions on each window in turn, to ensure that the inputting of information is trouble-free. As you work through the Wizard you will need to enter information using Search buttons and drop-down menus. This information originates from the Settings menu and will still have to be set up there before using the Wizard.

4 Click on **Next >>** to proceed.

The Training Profile button allows you to view training profiles of selected members of staff.

4.2.1 Selecting members of staff

This window requires you to select the member(s) of staff whose training records you wish to update.

1 Read the instructions at the bottom of the window.

2 Select the relevant member(s) of Staff (see below).

3 View training profiles of any member(s) of staff if required (by clicking on the **Training Profile** button).

4 Click on **Next >>** to proceed.

To select member(s) of staff, scroll in the left hand side of the window (Available Staff) to find the relevant name(s), highlight and click on the central add button (**>>**). This will move the name(s) to the right hand side of the window (Selected Staff). To de-select staff, use the central remove button (**<<**).

Alternatively you may use the Search button to search for specific personnel. Type in a Personnel ID or Login (if known) or the surname; then right-click on the Search button and select the relevant search method or use the keyboard short-cuts - Personnel ID (F3), Login (F4) or within Surname (F5).

See also: Updating training gained

4.2.2 Updating training gained

After you have selected the member(s) of staff whose training records you wish to update and clicked on **Next >>** (in the Training Gained wizard), the three dialogs that follow have similar content and purpose - one allows you to update Courses, one updates Skills and the final one updates Qualifications.

Updating courses attended

The only existing courses or results ever listed on the **Courses Attended** window will be those entered this session; you may select them (use **Select** button) to view or amend.

1 To add new course achievements, click on the **New** button and see below.

2 If you wish to update skills or qualifications click on **Next >>**.

You may view the current training history of a selected member of staff at any time by clicking on the Training Profile button.

If you click **New**, the **Record Course Attended** window will appear. The names of the selected members of staff are listed and the program defaults to show that they have passed a course. You must now select the course they attended and the date on which it took place - these are mandatory fields.

You may also select all or any of the named personnel and amend their overall course result (Pass, Fail, Reserve Judgement or Absent).

1 Select a **Course** using the Search button.

2 Enter a **Date Course Attended**.

3 If you are happy with the default results, **Save** and continue to enter other results or **Close**.

If you wish to alter the default course result (Pass) for a specified member of staff, highlight their name and click **Select** or double-click on the required name. Their **Course Results** window will become available allowing you to amend the overall result and **Save**.

If you need to make notes, record a numeric score or use specific result descriptions for the course results, you cannot do this in the Wizard but may do so in **Course | Complete Course** (see Updating or recording detailed course results).

The altered course result will now show in the main window.

4 Alter results for any other personnel and **Close**.

5 Then click **Next >>** to move on and update skills and/or qualifications.

See also: Updating skills Updating qualifications

4.2.3 Updating skills

The skills record of selected members of staff may be updated on the **Skills Attained** window (this is reached by clicking on **Next >>** several times after selecting member(s) of staff in the **Identify Training Gained** wizard, until you reach the relevant dialog).

Updating skills attained

The only skills ever listed on the **Skills Attained** window will be those entered this session; you may select them (use **Select** button) to view or amend.

1 To add a new skill to the training record of selected personnel, click the **New** button and see below.

2 If you wish to update qualifications click on **Next >>**.

You may view the current training history of a selected member of staff at any time by clicking on the Training Profile button.

If you click **New**, the **Record Skill Attainment** window will appear, allowing you to add the chosen skill(s) to the training record of selected personnel...

1 Select the relevant **Skill** and the **Date Attained**. (Type in the date or use the Date button)

2 **Save** and continue to add further new skills or **Close** to return to the Skills Attained window.

When you close this window the new skill(s) will have been added to the Skills Attained list. If necessary, you may modify these using the **Select** button but only up until you click on **Finish** in the final window. (Once you click **Finish** you cannot go back to make any further modifications.)

3 Finally, click on **Next >>** again to add qualifications gained if required.

See also: Updating qualifications

4.2.4 Updating qualifications

Qualifications gained are updated in exactly the same way as skills (but on the Qualifications Gained window); they apply to the same selected personnel. The **Qualifications Gained** window is reached by clicking on **Next >>** several times after selecting member(s) of staff in the **Identify Training Gained** wizard, until you reach the relevant dialog.

Updating qualifications gained

The only qualifications ever listed on the **Qualifications Gained** window will be those entered this session; you may select them (use **Select** button) to view or amend.

1 To add a new qualification to the training record of selected personnel, click the **New** button and see below.

2 If you wish to update courses or skills go **Back**.

You may view the current training history of a selected member of staff at any time by clicking on the Training Profile button.

If you click **New**, the **Record Qualification Gained** window will appear, allowing you to add the chosen qualification(s) to the training record of selected personnel...

1 Select the relevant **Qualification** and the **Date Gained**. (Type in the date or use the Date button)

2 **Save** and continue to add further new qualifications or **Close** to return to the **Qualifications Gained** window.

   When you close this window the new qualification(s) will have been added to the Qualifications Gained list. If necessary, you may modify these using the **Select** button but only up until you click on **Finish** in the final window. (Once you click **Finish** you cannot go back to make any further modifications.)

3 When you have added all the qualifications required, click on **Next >>** to complete the addition of all new training gained.

See also: Saving new training gained

4.2.5 Saving new training gained

The final screen allows you to save or abandon all the changes made. You may still view the updated training profile of any member of staff by clicking on the **Training Profile** button.

1 Read the instructions.

2 If you wish to abandon the updates, click on the **Close** button and don't save the changes.

3 Otherwise, click on **Finish** and the appropriate personnel records will be updated.

See also: Where to view information entered using the Wizards

4.3 Training profile

If you have already selected a member of staff whose training profile is to be viewed you will be taken directly to their Training Profile, by default open at the **Overall** History page.

If a member of staff has not been specified the **Training Profile** button will take you initially to the **Select Member of Personnel** dialog. Here you should select the relevant member of staff **-** with the help of the Search button, by double-clicking or by highlighting and clicking the **OK** button (see Search routines).

The full training history is shown, chronologically by default, on the **Overall** page; select the relevant radio button to re-order the entries by Description or Date Entered.

The other three pages show **Course** / **Skill** / **Qualification** information separately and there are filters on each to aid selection of the appropriate record. See also Viewing a Training Profile.

Close the **Training Profile** and **Select Member of Personnel** dialogs to return to the wizard.

4.4 Where to view information entered using the Wizards

Information entered into the module using the **Identify Training Requirements** wizard can be seen in the following dialogs:-

Training | View Training Requirements

Training | View Profile

Course | Schedule Course (The **Show Relevant Personnel** button on the main dialog gives you a list of all personnel with a current training requirement for the course you are about to schedule.)

Reports | Training Required

Reports | Training Profile

Information entered into the module using the **Identify Training Gained** wizard can be seen in the following dialogs:-

Personnel | Details

Training | View Qualifications

Training | Delete Qualifications

Training | View Profile

Reports | Personnel Details

Reports | Training Gained

Reports | Training Profile

5 Scheduling courses

After courses have been created in the **Settings** menu they may then be scheduled to run on specific dates and have relevant personnel nominated to attend. The courses may be edited up until they are actually marked as complete and results noted. So even if a course is scheduled for a particular date and it does not take place on that date, it may still be updated (and moved forward to another date).

The **Course | Schedule Course** dialog allows scheduled courses to be created, viewed, edited and deleted.

Hit the **New** button on the **Select Scheduled Course** dialog to schedule a specific course and then see Scheduling a new course.

To view, edit or delete an existing scheduled course, select the course required (using the Search button or Filters if required). By default, the courses in the **Select Scheduled Course** dialog are ordered numerically by Course ID. Click the column header of any other column to sort by that column in either descending or ascending order (see Sorting and ordering). Filter by selecting a specific Course type or Course status using the drop-down menus or by entering a Start date. Course types originate in **Settings | Course Type**; the Course status will either be Scheduled or In Progress.

Highlight the required course and click **OK**, or double-click to open the **Maintain Scheduled Course** dialog.

Document Training report

This two-page dialog is accessible from both the Training and Document Control modules. The first page, **Document Details**, allows you to filter the report by specifying document search criteria (following the format of most Document Control report selection criteria dialogs). The second page, **Course Details**, allows you to specify course selection criteria and gives direct access to the **Select Scheduled Course** dialog so that you may select specific scheduled courses to report on.

ALL scheduled courses are available for selection (providing you have the necessary access rights) regardless of whether their status is Scheduled, In Progress or Complete.

5.1 Scheduling a new course

Two workflow settings will affect when messages regarding courses are sent to relevant personnel. Unlike Personal Workflow Settings which each user may configure for themselves (providing that they have the necessary access rights and permissions), the system Training settings can only be set up by the system administrator (or anyone with access to the **Workbench Configuration Centre**). They can be found in the Configuration Centre under Workflow Settings | System Wide | Training Settings.

- *Number of days before course start date that task is sent to trainer* - highlight this option to open the **Setting Value** field. Enter the required number of days and the task message 'Please run/complete course <xxxx>' will automatically be sent to the Trainer when the appropriate number of days before the scheduled course is due to run is reached.

- *Number of days before course start date that tasks are sent to attendees* - highlight this option to open the **Setting Value** field. Enter the required number of days and the task message ' Please attend course <xxxx>' will automatically be sent to the course Attendees when the appropriate number of days before the scheduled course is due to run is reached.

NB. Calendar entries, *Course Scheduled for the Trainer* and *Booked on course for the attendees* will also automatically be made on the relevant dates. This is regardless of whether or not the above workflow settings are in force.

Documents and Training courses

A separately licensed Workbench area, Document Training, allows documents to be associated with training courses. When a course is scheduled from within the Document Control module, any associated document(s) may be locked and prevented from being issued until all relevant training has been completed. These documents will be marked as 'Undergoing training'. For full details, see the Help topic Scheduling Courses when issuing documents in Document Control.

NB. The Document Training add-on may only be licensed provided that both the **Training** and **Document Control** modules are also licensed.

Scheduling a course

1 Select **Course | Schedule Course** to view the **Select Scheduled Course** dialog.

2 Click on **New**. (To view, edit or delete an existing course, see Maintaining scheduled courses.)

3 In the **Create Scheduled Course** dialog, select the **Course** to be scheduled using the Search button. A scheduled course must be based on a course already set up in **Settings | Course**; the new course is automatically given the name of the course it is based on but this may be altered manually. You cannot select other pages until a base course has been entered.

4 Amend the course **Name** if preferred (the actual **Course** cannot be renamed).

5 Attach any files to the scheduled course if required using the Attachments button (see Attachments). Existing attachments may be viewed, edited or deleted by users with appropriate access rights to the **Schedule Course** dialog.

6 The **Search Code** will automatically follow the course **Name** but may be changed manually.

7 If the course is to be held externally, tick the appropriate check box. The **Trainer** field will then change to **Supplier** and the Search button will take you to a list of suppliers (instead of the personnel list if Trainer is chosen). The list of suppliers is set up in **Settings | Suppliers** and will contain suppliers originating from other installed modules that use the same records.

8 Select a course **Location** if applicable. These are set up using **Settings | Course Location**.

9 Enter the mandatory **Course from** and **to** dates.

10 Then move on to set up the other pages (see below).

11 When you are satisfied that you have entered all the relevant information, including the mandatory fields, and have selected personnel to attend the course, **Save** and schedule further courses or **Close** to go back to the **Select Scheduled Course** dialog – but be aware that none of the information will have been saved unless you hit the **Save** button. Provided that you have saved the information, the course(s) you have just scheduled will be listed there.

Documents page **Attendees page** **Analysis page**

Notifications and Tasks

The notification 'You have been booked on course <xx>' will be sent to the attendees on creation of a scheduled course, or if they are added as an attendee to an existing scheduled course.

The notification 'You have been assigned as trainer for the course <xx>' is sent to the internal trainer on creation of a scheduled course, or if they are elected as the new trainer for an existing scheduled course.

The system then sets an 'alarm' date, defined by the values of the Training module workflow settings (see above). When the alarm date is reached the following task messages are also sent to the attendees and internal trainer respectively.

- Please attend course <xx>
- Please run/complete course <xx>

Both tasks will be marked as Completed when the course is completed. If the tasks have been sent but the course is subsequently deleted, then the tasks will be marked as Superseded.

5.1.1 Documents page

The page displays any documents associated with this training course. You cannot add any further documents (these are associated at the time of setting up the base course in **Settings | Course** or in the Document Control module) but with appropriate access rights you may **View** a selected document and/or its **Attributes**. Use the Search button at the top of the page to find specific documents if the list is long.

Documents may appear as a PDF or in their original format depending on the configuration of the document's workflow settings and status.

If a document has been annotated, (when a change request was raised or when the document was undergoing a review) with appropriate access rights the annotations may be viewed from the relevant **Document Attributes Changes** or **Review** pages.

Any changes to the associated documents must be made via the **Settings | Course** dialog before scheduling the course.

The last column, 'Locked for Training' is controlled by the Document Control module. When issuing a document (**Issue Document** dialog) that is associated with a Course, the document may be submitted for training in which case it is 'Locked' and cannot be issued until all relevant training courses for all attendees are complete. Courses cannot be locked in this way when scheduled from within the Training module. For full details, see Scheduling courses when issuing documents in Document Control.

5.1.2 Attendees page

This page displays all personnel required to attend the course; it will be blank when initially scheduling a course. To select members of staff as Attendees, click on the **Define** button and then see the Help topic Defining course attendance.

NB. Once you have hit the **Define** button you will not be able to select any other page again until you hit the **Done** (or **Cancel**) button on the **Attendees** page.

Once Course Attendees have been selected, click the **Done** button and the Course Attendance List will appear again, listing selected staff members, alphabetically by Personnel ID. Click the **Define** button again if changes to the list are required. Continue this process until the Course Attendance List is correct.

The List can be sorted by either column - click on a column header to sort by that column, in either descending or ascending order - and use the Search button at the top of the page to help with searching where the list of attendees is long.

A **Course Attendance Report** may also be printed via the Print button at the top right corner. This allows you to sort the list by Staff ID, Surname or Forename and can be simply viewed, printed or saved to file.

5.1.3 Analysis page

Here you may select appropriate analysis categories (if any) to attach to this course. Categories originate in **Settings | User Defined Analysis | Course UDA** – see Selecting user defined analysis categories if you need help with this.

5.1.4 Defining course attendance

Selecting staff to attend a course is carried out on the **Attendees** page of the **Create Scheduled Course** dialog at the time of scheduling the course. Selected attendees may be edited at any time (up until the course is completed) on the Maintain Scheduled Course dialog.

On the **Attendees** page, hit the **Define** button. The page will change to show details of all personnel who have a requirement for the course as well as details of any personnel or groups already nominated to attend.

The Identified Personnel section at the top of the page displays a 'tree' structure listing all personnel with:-

- **Course requirement** - ie. have been marked as having a requirement for this course (eg. in the **Training Requirements Wizard**)
- **Skill requirements** - ie. have a skill that will be achieved by attending this course (eg. identified in the Training **Requirements Wizard**)
- **Qualification requirements** - ie. require a qualification that will be gained by attending this course (eg. identified in the **Training Requirements Wizard**)
- **Document training requirements** - ie. are on the Distribution List(s) of any associated docs.

This information can be expanded / contracted using the plus / minus signs or by checking the *Expand all* check box.

A user may appear more than once in the list; selecting or de-selecting them will affect all instances of that person (eg. they cannot be selected under **Course requirements** but de-selected under **Document training requirements**).

Personnel and groups that are attending the course are shown with a tick next to them in the tree structure and show as being selected in the bottom part of the page. Double-clicking on an entry in the tree structure will toggle its inclusion on the course; its 'tick' status and inclusion in the bottom part of the page will be updated accordingly.

To select all personnel identified for attendance on this course, tick the *Select all identified personnel and groups* check box at the top of the window. If some, but not all, of the identified personnel are currently selected then this check box will be greyed out. Clicking on it in this case will check it and include ALL identified personnel on the course.

To select individual personnel who have specific requirements for a course, skill, qualification or for document training, highlight the appropriate entry (Course, Skill, Qualification or Document training) and then check the box below the window (the wording will change as you highlight a different entry).

To print a defined attendance list, hit the **Print** button at top right on the **Attendees** tab page - see Course Attendance Report.

Remaining Personnel and Groups

The bottom part of the page consists of two selection boxes that list all available and selected personnel. Select the **Personnel on course** tab to view individual personnel who have already been selected to attend the course (from the 'tree' above); select the **Groups on course** tab to view personnel groups already selected.

From here you may add any further attendees not already identified or remove individual personnel (or groups) from the Attendance List. Lists on the left of the window show Available personnel; to select, double-click on an entry or highlight the required entry and use the central **>>** button to add to the right hand side (Selected personnel). To remove, reverse the procedure. See Groups /Lists for further help if needed. If an individual or group is added or removed from the course that is included in the identified tree structure above, then its 'ticked' status will be updated to reflect this.

Once Course Attendees have been selected, click the **Done** button and the Course Attendance List will appear again, listing selected staff members, alphabetically by Personnel ID. Click the **Define** button again if changes to the list are required.

NB. You will not be able to select any other page again until you hit the **Done** (or **Cancel**) button.

Appropriate History entries are made regarding course attendance and any changes made to attendance lists.

6 Maintaining scheduled courses

Once scheduled, courses may be viewed, updated or deleted using the **Maintain Scheduled Course** dialog.

Maintaining a scheduled course

1. Select **Course** from the main **Training** menu.
2. Choose **Schedule Course** from its menu and the **Select Scheduled Course** dialog will appear; by default, the courses are ordered alphabetically by Search Code. Click the column header of any other column to sort by that column in either descending or ascending order.

   If the list of courses is long, use the Search button or Filters to narrow your search. Filter by selecting a specific Course Type or Course Status using the drop-down menus or by entering a Start Date. Course Types originate in **Settings | Course Type**; the Course Status will be either Scheduled or In Progress.
3. Using the Search button and/or filters as above, select the course to maintain. Highlight and click **OK**, or double-click to open the **Maintain Scheduled Course** dialog showing full details of the selected course.
4. Up until the scheduled course has been completed, most parts of the dialog may be edited. To do this, simply enter the revised information in the relevant fields or use the Search buttons and drop-down menus to call up new data. You may not add or remove any documents on the **Documents** page.

See Scheduling a new course for detailed information on each page and selecting Attendees.

A **History** page is an addition to the **Maintain Scheduled Course** dialog and this maintains a full audit trail of all changes made to a selected scheduled course. It is read-only. Entries may be filtered using the **Filter** button at the top right of the page. The **Filter History Display** dialog is self-explanatory - selected items in the list will be displayed, those that are not high-lighted will not be shown.

Red text at the bottom of the **History** page shows whether the list has been filtered. A **Clear** button next to the **Filter** button allows you to clear History filters quickly without having to re-open the **Filter** dialog and manually select all entries.

6.1 Updating or recording detailed course results

When completing (or updating) a course, results for every named member of staff default to ' Reserved'. The **Pass All** button on the **Complete Scheduled Course** dialog records the same ' Pass' result for each attendee and also the same Result Description (if selected). If you wish to enter a different course result or make notes, or simply update course results without marking the course as Completed, you may also do so in **Course | Complete Course**.

Updating or recording detailed Course Results

1. Select **Course** from the main **Training** menu.
2. Choose **Complete Course** from its menu; the **Select Scheduled Course** dialog appears listing only scheduled courses that have a Start date before today's date (and to which you have access rights). Filters and sorting options are as in **Maintain Scheduled Course**.
3. Select the relevant course using filters and/or Search button if preferred; the **Complete Scheduled Course** will open at the **Course Results** page. Double-click on the member of staff whose results you wish to record. The **Course Results** dialog will open.

4 In addition to recording the overall **Result** of the course (ie. Pass, Fail, Reserve Judgement or Absent) you may also record a **Score** (numeric, user-definable), and/or a **Description** chosen via the Search button from those set up in **Settings | Result Description** (providing that you have access to the Results Description option). None of these results are mandatory.

5 Highlight the required overall **Result** by selecting the appropriate radio button.

6 Enter a **Score** (if required).

7 Choose a result **Description** using the Search button (from those set up in the **Settings** menu).

8 Add any **Notes**.

When you **Save** you will be taken back to the main window. Continue to select other members of staff until you are satisfied that each attendees' record will be marked as you want it to be. A right-click option on the **Complete Scheduled Course** dialog allows you to print the window.

If you simply wish personnel records to be updated, click **Update**; this intermediate information will not appear on the training profile history of the personnel concerned. The course will be marked as 'In Progress' which will prevent changes being made to the base course and start date.

If you wish the new information to be recorded in the profile history and to mark the course as Completed, click on **Complete** and confirm the message to save the results.

NB. A workflow setting *Require password when updating or completing a training course* (Workbench Configuration Centre | System Wide | Password Configuration | Additional password requirements) if checked, will require you to enter your password before allowing the update or completion.

The **Select Scheduled Course** dialog will appear again. If you clicked on **Update**, the course will remain in here. If you clicked on **Complete**, the course will no longer be in the list and will only be available to view in **Course | View Course** where all the components (including individual's results) are read-only.

7 Completing scheduled courses

When scheduled courses have been run, **Course | Complete Course** enables you to enter results of course attendees; this automatically updates training records and marks the scheduled course as Completed. However, after entering results, the **Update** button will be enabled (in addition to the **Complete** button) so you have the choice of either completing or updating the course. If the **Update** button is clicked, the course will be given the status of 'In Progress' and will prevent changes being made to the base course and the course start date.

Completing a Course

1. Select **Course** from the main **Training** menu.
2. Choose **Complete Course** from its menu; the **Select Scheduled Course** dialog appears listing only scheduled courses that have a Start Date before today's date (and to which you have access rights). Filters, sorting & ordering options are as **Maintain Scheduled Course**.
3. Select the course you wish to mark as complete. The **Complete Scheduled Course** dialog will open at the **Course Results** page. All course attendees are listed and, by default, the Pass/Fail column shows 'Reserved' for each one. Attendees can be sorted by clicking on the column headers.
4. If you are happy to mark each attendee with a simple 'Pass', click on the **Pass All** button. After an initial warning, the **Select Result Description** dialog will automatically pop up when you hit the **Pass All** button (providing that you have access), allowing you to attach a Result description (from **Settings | Result Description**); but beware that this same description will be attached to all the attendees' course results.

   (**NB**. Up until you hit the **Complete** button you may amend an individual attendee's result.) Where the list of attendees on a course is long and most have achieved the same 'Pass' result it is probably best to **Pass All** and then to **Select** any individual attendee(s) and amend their result - see Updating or recording detailed course results.

   If you wish to enter a different course result or notes for a specific attendee, select the relevant member of staff by highlighting their name and click on **Select** (or double-click). Then see Updating or recording detailed course results, where you may also update course results without marking the course as Complete.

   A right-click option on the **Course Results** page allows you to print the window.

   The **Details** page is read-only but users with appropriate access rights may still view, add, edit and/or delete attached files via the Attachments button. You may also **View** a highlighted document and/or its **Attributes** on the **Documents** page, using the appropriate button.

   There is a workflow setting *Allow changes to User Defined Analysis when completing a course* that, if checked, will allow you to edit the user-defined analysis on the **Analysis** page when completing a course. If the page is read-only, your system administrator will have disallowed this option.
5. The **History** page is read-only and may be filtered using the **Filter** button if required. A **Clear** button next to the **Filter** button allows you to clear History filters quickly without having to re-open the **Filter** dialog and manually select all entries.
6. When you are happy with the recorded results, click on the **Complete** button to mark the course as Completed (a password will be required if the relevant workflow setting is checked - see System Wide | Password Configuration | Additional password requirements).

Personnel records will be updated accordingly. If a user with a requirement to attend a course fails it, their records will still show an outstanding requirement.

7.1 After a course has been completed

- Any associated documents that have been locked as 'Undergoing Training' will be unlocked. At this point the system will check to see if the document is locked on other courses. If it isn't, and the current document status allows, the document will be issued and distributed and, if required, a review will be scheduled.
- If Document Training is not licensed or the course is scheduled via the Training module, then no document locking takes place and on completion of the course, associated documents will not automatically be issued. (Document locking is only done at the point of scheduling training before issuing the document (within the Document Control module - see Scheduling courses when issuing a document).
- Tasks to the trainer and attendees will be marked as complete.
- Each attendee will have a result entered in their training profile.
- Attendees marked as Fail, Absent or Reserve Judgement will not have their training requirement removed.
- The document owner will be notified (if applicable) that the document training is complete.
- The course and the document will have history entries recorded against them.
- The named course disappears from the **Schedule Course** and **Complete Course** dialogs and appears in **Course | View Course**, marked as Completed.

8 Viewing scheduled and completed courses

All scheduled courses may be viewed (read only) at any time using **Course | View Course**. This is regardless of their Status - Scheduled, In Progress or Completed.

Viewing a Course

1. Select **Course** from the main **Training** menu.
2. Choose **View Course** from its menu and the **Select Scheduled Course** dialog will appear listing all scheduled courses to which you have access rights. Filters, sorting and ordering options are as in **Maintain Scheduled Course**.
3. Select the course you wish to view.

When you have selected the course you wish to view, its full details (read-only) will be available in **View Scheduled Course**.

Users with appropriate access may view files attached to the course using the Attachments button on the **Details** page.

Users with appropriate access may **View** a highlighted associated document and/or its **Attributes** using the buttons on the **Documents** page.

Users with appropriate access may view the **Attendees** page of courses with 'Scheduled' status. Once a course has any results recorded against it (either by updating a course with 'In Progress' status or because the course has been marked as Complete and has had results recorded for it) then the **Attendees** page will be replaced by the **Course Results** page.

Users with appropriate access to view detailed course results of attendees on a course with 'In Progress' or 'Completed' status, may do so by double-clicking on the required name on the **Course Results** page (or by highlighting and clicking on **Select**). A right-click option on the main **Course Results** page allows you to print the window.

Various entries on the **History** page are global eg. ‘Scheduled Course <xx> attendees changed by <xxx>’. Right-click on this type of entry to view further details.

9 Training records

Menu items in the Training menu allow users with relevant access rights to view current training requirements, qualifications and profiles of individual members of staff. Using these dialogs, a comprehensive and up-to-date picture of any member of staff's training history and on-going needs can be accessed very easily. Out-of-date qualifications may also be deleted.

Three View dialogs (**View Training Requirements**, **View Qualifications** and **View Profile**) are found in the Training menu, plus **Delete Qualifications**. The first task in each of these dialogs is to select the relevant member of staff.

Selecting a member of staff

Each of the dialogs show the **Select Member of Personnel** dialog first ...

Select the member of staff whose records you wish to view. Using the Search button, staff may be searched for by Personnel ID (F3), by Login (F4), by searching within the Name (F5) or by Forename (F6). If you do not wish to use the Search button, double-click on the relevant name or highlight the name and click **OK**.

9.1 Viewing training requirements

This dialog shows the training requirements (Course, Skill, Qualification) for specified personnel.

1 Select **Training** from the main **Training** menu.

2 Choose **View Training Requirements** from its menu and then select the required member of staff in **Select Member of Personnel**:-

- by using the Search button
- by double-clicking on the required name or
- by highlighting the name and clicking **OK**.

3 The **Current Training Requirements** for the selected person will then be shown. Each of the three pages is read-only and each is laid out in the same way. See Sorting and ordering if you wish to move the sort to a different column.

4 View the current **Course**, **Skill** and/or **Qualification** requirement on the relevant page.

The Date Due column shows the date by which the course should be carried out. If a course is a Follow Up course, the Date Due will be updated automatically each time the course is attended and the qualification refreshed.

Highlight and right-click on any course, skill or qualification to view its full details and/or course requirement notes.

5 **Close** the window when you have finished viewing the requirements and you will be taken back to **Select Member of Personnel**.

6 Choose a different member of staff if required or **Close**.

9.2 Viewing qualifications

This dialog shows the current qualifications for a specified member of personnel.

1 Select **Training** from the main **Training** menu.

2 Choose **View Qualifications** from its menu and then select the required member of staff in **Select Member of Personnel**:-

- by using the Search button
- by double-clicking on the required name or
- by highlighting the name and clicking **OK**.

3 The **Current Qualifications** for the selected person will then be shown. By default the list is sorted alphabetically by Qualification. See Sorting and ordering to move the sort to a different column.

If the qualification requires a Follow-up course, a date when the qualification becomes overdue will be specified. The 'Date Overdue' column updates automatically each time the qualification is refreshed; relevant training records are also updated.

If a Follow-up course is not applicable this column will show N/A. Otherwise it will specify whether the Follow-up course has been assigned - Yes or No.

To view full details of a Qualification (read-only), highlight and right-click on the relevant entry.

4 **Close** the window when you have finished viewing the qualifications and you will be taken back to **Select Member of Personnel**.

5 Choose a different member of staff if required or **Close**.

9.3 Deleting qualifications

When qualifications are no longer valid or become out of date you may delete them from the relevant member of staff's records. To do this...

1 Select **Training** from the main **Training** menu.

2 Choose **Delete Qualifications** from its pull-down menu. The **Select Member of Personnel** window will appear.

3 Select the relevant member of personnel:-

- by using the Search button
- by double-clicking on the required name or
- by high-lighting the name and clicking **OK**.

The **Current Qualifications** dialog for the selected user will appear; this is almost identical to the dialog shown for Viewing qualifications but includes a **Delete** button.

4 Highlight the qualification you wish to delete and click the **Delete** button. Confirm your decision and the qualification will be deleted.

NB. To view full details of a Qualification (read-only), highlight and right-click on the relevant entry.

9.4 Viewing a training profile

This dialog allows the training profile for a specified user to be shown in whole or in its Course, Skill or Qualification constituent parts.

If you are viewing a Training Profile from within either the **Training Requirements wizard** or **Training Gained wizard**, the **Training Profile** button will take you straight to the **Overall** page of the profile of a selected member of staff **-** see point **4** below.

Viewing a training profile from the Training menu

1 Select **Training** from the main **Training** menu.

2 Choose **View Profile** from its menu and then select the required member of staff in **Select Member of Personnel**:-

- by using the Search button
- by double-clicking on the required name or
- by highlighting the name and clicking **OK**.

3 By default, the list will not include members of staff who have left. Tick the relevant check box at top right if you wish to include all personnel, past and present, in the search.

If the *Hide 'admin' account from System and Personnel modules* workflow setting is checked, then the 'admin' record will be excluded from the Personnel list here (unless you are logged in as admin).

4 The **Training Profile** for the selected person will be shown. The **Overall** page gives the total training profile (past, present and future) with relevant dates. By default the records are shown in Date Occurred order, most recent first; use the radio buttons at the top of the dialog to re-order them by Description or Date Entered. The **Course**, **Skill** and **Qualification** pages allow further, more precise, filtering.

 Double-click on entries marked with this symbol to reveal sub-entries.

 Entries marked with this symbol have been fully extended. Double-click on the marked entry to hide its sub-entries.

 This symbol is used to highlight an individual entry or sub-entry.

Further details on most entries will be shown by right-clicking on a selected entry.

5 Click on individual pages to give the breakdown by Course, Skill or Qualification (see below).

Course, Skill and Qualification pages

If you click on any of these pages in the **Training Profile**, a list of all the training relevant to the selected user will appear. By default, the lists will be sorted by Date Occurred, most recent first. See Sorting and ordering to move the sort to a different column.

Using the Search button on the relevant page you can easily check whether the selected member of staff has attended a specific course, attained a particular skill or obtained a stated qualification.

The entries may be filtered by date - EITHER enter dates between which a course was attended, skill attained or qualification obtained (Occurred From / to) OR enter rough dates (Entered From / to) when an entry regarding the training was made. When the list is filtered, red text appears at the bottom of the dialog warning you of this. Hit the **Clear Filters** button to clear any previous filtering.

Right-click on entries to reveal full details.

The **Filter** button at top right on each of the pages allows you to filter history entries by type. Click on this button to bring up the **Filter History Display** dialog; instructions on how to use this are given at the top of the dialog. When the list is filtered, red text appears at the bottom of the Course, Skill or Qualification page warning you of this. Click on the **Clear Filters** button to remove any filters and show the full list of entries.

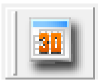
NB. The **Clear Filters** button removes ALL filtering from the selected page (ie. dates plus History entries). However it will not clear the filters from any other non-selected pages.

10 Tasks, Notifications and the Calendar

On the main toolbar there are three buttons in addition to the buttons showing other installed Workbench modules.

The Tasks button advises personnel that they are being asked to perform a task.

The Notifications button is used to inform personnel that certain events have taken place.



The Calendar button gives direct access to a calendar that records all important events and deadlines from this and other installed modules.

10.1 Messages generated by the Training module

The Training module fully supports the mail and messaging mechanisms found throughout Workbench. These allow the processing of messages through external e-mail systems and an extremely powerful internal messaging system using Tasks and Notifications. These messages are generated automatically by the program and may be for either action or information only purposes.

A brief description is given here of which users messages generated by the Training module are sent to and when the message is sent. Messages may also be sent externally if configured to do so by the system administrator in the **Workbench Configuration Centre**.

	Message & Type	**When Sent**	**Sent to**	**Supersedes**
1	You have been booked on course (N)	On creation of a scheduled course or if added to an existing scheduled course	Attendees	
2	You are no longer required to attend course (N)	If an attendee is removed from the course attendance list	Attendee(s)	
3	You have been assigned as trainer for course (N)	On creation of a scheduled course or if appointed as trainer for an existing scheduled course	Internal trainer	
4	You are no longer trainer for course (N)	If an internal trainer is replaced with either an external supplier or another internal trainer	Internal trainer	
5	Course start date has changed (N)	If the start date of a scheduled course changes	Attendees and Internal trainer	

6	Please attend course (T)	A workflow setting controls the number of days in advance of the course start date that this task will be sent. If set to 0 the task will be sent on the day before. If set to 10, for example, the task will be sent 10 days before the start date.	Attendees	If the task has been sent and the course is deleted, the task will be marked as superseded.
7	Please run / complete course (T)	A workflow setting controls the number of days in advance of the course start date that this task will be sent. If set to 0 the task will be sent on the day before. If set to 10, for example, the task will be sent 10 days before the start date.	Internal trainer	If the task has been sent and the course is deleted, the task will be marked as superseded.

10.2 Training module calendar entries

There are two Training module Calendar entries:-

- When a new course is scheduled, an internal trainer will automatically have the entry ‘Course <xx> has been scheduled’ placed on their calendar at the same time that the notification ‘You have been assigned as trainer for course <xx>’ is sent.
- When a new course is scheduled, attendees will automatically have the entry ‘Booked on course <xx>’ placed on their calendar at the same time that the notification ‘You have been booked on course <xx>’ is sent.

11 Reports

The Training module supports a range of reports that can be used for a variety of purposes; for example, simple monitoring of scheduled courses within a specific date range or searching for members of staff who hold a particular qualification.

Each report dialog offers different selection criteria and you may choose how many of these you wish to include. Obviously the more specific you are in the areas you include in the search, the fewer number of records are likely to match up.

Reports will only be issued when information matches all the criteria selected; all reports can be simply viewed, sent to file or printed out.

11.1 Personnel details report

This report shows the Personnel ID, Login, Name and Department of all members of staff who have attended a selected course, attained a particular skill or obtained a specified qualification. More than one field may be selected at any one time.

Setting up a Personnel Details report

1. Click on **Reports** in the main **Training** menu and select **Personnel Details**.
2. Select the relevant Course/Skill/Qualification using the Search buttons.

   If you select a Qualification the *Only Select Currently Valid Qualifications* check box will open. The lower check box then becomes available if you tick the top check box. Both are self-explanatory.
3. Select the relevant Report Options.
4. Click **OK** to compile the report.

See also: Viewing, printing or saving reports

11.2 Report options

Group by. Where relevant, information given in reports may be grouped in different ways chosen from the drop-down menu (eg. by Department or Type). For example, the report in the example above would show personnel listed first by Department and then alphabetically by Name (if this ‘ Order by’ option is selected) within their Department. When the **Group by** field is selected, the check box alongside it becomes available. Tick the box if you wish the report to start on a new page for each group.

Order by. Some reports allow you to choose the way in which the information offered in the report is ordered (eg. by Name, by Login etc.), by selecting from the drop-down menu. Where there is no choice, the text in the **Order by** field is grey and there will no drop-down menu.

Destination. You may choose to send the report to the Screen for a print preview, direct to the Printer or to File. See Viewing, printing or saving reports for full information.

Tick the **New Page on Group Break?** or **New page on change of Document?** check box (if either are available) if you want a new page to be started for each different group **shown in the report.**

Tick the **Print Attachment information?** check box (if available) if Attachment information is required.

Tick the **Print Date/Time Produced?** check box if you want the date and time that the report was created, to appear on the actual report.

Print summary report? This option only appears for the **Document Training** report and is checked by default. If you want a fully detailed report showing all course attendees and results (if the course completed) then this box must be de-selected.

11.3 Training required report

This report is intended to show the training required by one or more members of personnel.

Setting up a report for Training Required

1. Click on **Reports** in the main **Training** menu and select **Training Required**.
2. Tick the check box at top right if you want the list to include staff who have left.
3. Select the relevant **Personnel** (see Groups / Lists if you need help with this.)
4. Select the period of time you wish to search on and whether you wish to show Course(s), Skill(s) and/or Qualifications.
5. Select **Report Options**.
6. Click on **OK** to compile the report.

On this report, the only **Order by** option is by Name (ordered alphabetically if more than one).

See also: Viewing, printing or saving reports

11.4 Training gained report

This report is intended to show the training gained by one or more members of personnel.

Setting up a report for Training Gained

1. Click on **Reports** in the main **Training** menu and select **Training Gained**.
2. Tick the check box at top right if you want the list to include staff who have left.
3. Select the relevant **Personnel** (see Groups / Lists if you need help with this.)
4. Select the period of time you wish to search on.
5. Use the check boxes to select whether Course(s), Skill(s) and/or Qualifications should be reported on.
6. Select Report Options.
7. Click **OK** to compile the report.

NB. On this report, the only **Order by** option is by Name (ordered alphabetically if more than one).

See also: Viewing, printing or saving reports

11.5 Training profile report

This report is intended to show the training profile for one or more members of personnel including any associated documents and document revision number that they have been trained on.

Setting up a Training Profile report

1. Click on **Reports** in the main **Training** menu and select **Training Profile**.
2. Tick the check box at top right if you want the list to include staff who have left.
3. Select the relevant **Personnel** (see Groups / Lists if you need help with this.)
4. Select the period of time you wish to search on. You may choose whether to search between dates when the training actually took place (**Occurred From/To**) or dates when the training profile was updated (**Entered From/To**).
5. Select Report options.
6. Click **OK** to compile the report.

NB. On this report, the only **Order by** option is by Name (ordered alphabetically if more than one).

11.6 Course details report

This report is intended to show the details of scheduled courses including any associated documents where applicable.

1. Click on **Reports** in the main **Training** menu and select **Course Details**.
2. Select a **Course Name** using the Search button or enter the **Search Code** if known.
3. Select the **Status** of the course if relevant.
4. Select the **Type** of course if relevant.
5. Filter by dates if required.
6. Select Report options.
7. Click **OK** to compile.

NB. If, in **Report Options**, you choose a **Group By** option from the drop-down menu, the check box marked *New Page on Group Break?* will be enabled; this gives you the option to start a new page of the report for each group reported on.

11.7 Document training report

This report is accessible from both the Training and Document Control modules; it is a two-page dialog. The first page, **Document Details**, allows you to filter the report by specifying document search criteria (following the format of most Document Control report selection criteria dialogs). The second page, **Course Details**, allows you to specify course selection criteria.

The report will be printed out as a Summary (the default) but if the relevant check box in Report Options is de-selected, full details will be shown including course attendees and course results (for completed courses).

Setting up a Document Training report

1 From the **Reports** menu choose **Document Training**; the **Document Training Report** dialog will appear.

2 None of the selection criteria is mandatory. If you simply click **OK** the report will use its default settings and produce a summary report showing a list of all documents associated with a training course, ordered by serial number.

For a more specific search use any of the searches and filters shown:-

- on the **Document Details** page use the Search buttons to select a range of **Serial Nos. from/to**
- **User ref contains** and **Title contains** - type in any word(s) that may be contained within the document **User reference** or **Title**
- use Search buttons to select only documents that have a specific **Author** and/or **Owner**
- select a specific Date range (using the Date button(s) when the document was created.

3 Highlight the status(es) you want to search on in the Document Status filter. To select consecutive items use the keyboard **Shift** key; to select non-consecutive items use the **Ctrl** key. Highlighted items will be included in the search.

4 The Document Attributes filters show document categories, departments and types. Scroll through these and highlight (as above) the required attributes to search on. To show hidden records, check the relevant check box above the required attribute(s).

5 Move on to the **Course Details** page to select further search criteria. Use Search buttons to select any specific element you wish to search on. If you can't remember a specific **Course ID**, enter any text that may be associated with the course title in the **Name Contains** field.

6 The search will focus only on courses with the highlighted status (more than one if required) in the Course Status box. Alternatively you may elect to show only courses that contain documents that are locked for training by checking the appropriate box.

7 Select appropriate Report Options.

Use the **Clear** button to clear the dialog (both pages) of currently selected document information.

8 When relevant criteria have been selected and the Report Options set up, click **OK** to run the report.

See: Viewing, printing or saving reports

11.8 Requirements summary report

This report is intended to show the number of people with requirements for courses, skills, qualifications and/or document training.

1 Click on **Reports** in the main **Training** menu and select **Requirements Summary**.

2 Select or de-select the required training requirement(s) to report on.

3 Enter relevant dates (to/from) when the course is/was due.

4 Select Report options.

5 Click **OK** to compile.

11.9 Course attendance report

This report will list all nominated attendees for a scheduled course. It is reached via the Print button at the top right of the **Attendees** page of the **Maintain Scheduled Course** dialog (**Course | Schedule Course**). This button will only be present when an actual attendance list has been defined.

1. In **Course | Schedule Course** select the required course to view/print an Attendance List for.
2. On the **Attendees** page, hit the **Define** button and check that the Attendance List is configured correctly (see Defining course attendance).
3. Amend if necessary and click on the **Done** button to return to the main Attendees page - or click **Cancel** to return.
4. Click on the Print icon button (top right) and the **Course Attendance Report** dialog will appear. By default, the list will be sorted by 'Surname'. Highlight either the 'Personnel ID' or 'Forename' radio button if you would prefer the report sorted in either of these ways.
5. Select the Report Destination and Report Option.
6. Click **OK** to compile.

The report will show Course details and list all attendees, giving Personnel ID and full names.

11.10 User defined reports

For users with appropriate access, this dialog gives read-only access to the **ReportQuest** module (if you have it installed).

Please refer to the ReportQuest Help system for full details on this module.

11.11 Viewing, printing or saving reports

An Information message will appear when no records can be found which meet the search criteria that you have set up. If you still wish to find records that may match your criteria closely, go back to the selection criteria window and broaden your original selection.

When there are records that match your search and depending on which report destination you chose, ie. Screen (print preview), Printer or File, either the **Print Preview** or the **Print** dialog will appear.

Screen (print preview)

The **Print Preview** dialog will appear when you select the Screen (print preview) destination option for a report (or in any other dialog). If you hold the pointer tool at the bottom of the toolbar, yellow pop-up bars will appear, explaining the feature of each button.

The Print icon allows you to print any material shown in the print preview.

By clicking on the middle of the three magnification buttons, the page will be shown full width.

By clicking on the right of the three magnification buttons, the page will be shown at actual size.

The left magnification button shows the whole page.

The outside arrows take you back to the first page or on to the last.

The single arrows allow you to turn the pages of a report backward or forward.

The number of the current page is shown in the centre.

If, in Report Options, you ticked *Print Date/time produced?* this information will appear on the report itself.

After previewing, use the **Close** button to close the record or print it by clicking on the small printer icon in the top left hand corner. If you elect to print, the **Print** dialog will appear.

Printer

If you selected the **Printer** destination on Report Options or clicked on the print icon in Print Preview, the **Print** dialog will appear. It may differ according to the type of printer you have installed and in some cases you will not have the option to *Print to File*.

1 Configure the printer if necessary.

2 Select the number of copies required and the Page Range.

3 Click **OK** to print the report.

In most instances you may still print to file from this dialog; to do this, click in the *Print to file* check box and then select the type and destination of the file (see **File**, below).

Each report will differ slightly according to the type and information shown but all will follow a similar format. All printed reports are A4 and have a wide left hand edge margin for binding.

File

If you chose the **File** destination option in Report Options the **Print** dialog will appear with the *Print to file* check box in the bottom part of the dialog already checked.

1 Tick the *Print to file* check box if it is not ticked.

2 Select the **Type** of file required from the drop-down list; this list may differ depending on the computer / network system you have installed.

3 Enter **Where** to save the file or select its destination using the **…** button.

4 Click **OK** to save to file in the selected destination (from where it may be e-mailed in the selected format if required.

12 Frequently asked questions

Do I have to go on a course to gain a skill or qualification?

No. Skills and qualifications gained in the past can be entered using the Identify Training Gained wizard. This can also be used to enter skills and qualifications gained by other means, for example, on the job training.

What's the difference between a qualification and a skill?

A qualification can be renewed - a skill cannot. Skills and/or qualifications make up a course; a course can provide many skills but only one qualification.

A typical example of a qualification would be a first aid certificate that may need renewing once a year. The date by which the qualification should be renewed is automatically logged in the training record(s) of relevant member(s) of staff.

What's the difference between a 'scheduled course' and a 'course'?

Courses are referred to as 'scheduled' when they have been planned in advance using **Course | Schedule Course**. Courses are referred to as simply 'courses' if they are entered using the Identify Training Gained wizard (ie. they have already been done).

If I'm booking a training course, how do I know who needs to go on it?

On the Course | Schedule Course dialog the **Attendees** page supports a **Define** button which offers a list of personnel who have a need for training that would be satisfied by attending the course you are scheduling. These names generate from the Identify Training Requirements wizard and/or from personnel records where a user has a requirement for a course, skill or qualification. Here you may also add other personnel or groups who have not been previously identified as needing specific training.

Am I automatically informed when I am booked to go on a course?

Yes. On creation of a scheduled course or if you are added to an existing scheduled course you will receive a Notification stating that you have been booked on a future course and the date of this. You will also receive an e-mail, if you are set up to receive mail externally, and an entry will be made in your calendar.

A task message to attend the course will also be sent on the day of the course or several days before the course is due to start according to how the appropriate workflow setting has been configured. If the date of a course is changed or if you are no longer required to attend the course, you will also be informed via a Notification.

I have several staff who need to attend the same course. Can I do this in one operation or must I enter each individually?

You may enter them all on the same course using one operation, when scheduling the course (see Course | Schedule Course). At this time a complete list of available personnel is shown and you simply select those needing to go on the course, either individually or by group.

What if my Qualification becomes overdue?

Personnel with a qualification that requires a Follow-up course, will have a relevant entry in their Training Profile stating when this requirement becomes due. Their names will then automatically be added to a personnel list which can be viewed by clicking on the **Define** button on the **Attendees** page when scheduling courses (see Course | Schedule Course).

If you run a Training Required report you will also generate a list of personnel who have a requirement to attend specific courses.

What if I need to add personnel to a course whilst it is being run?

This is allowed - course details can be edited until the course is marked as Complete.

In **Course | Schedule Course**, select the relevant course from the **Select Course to Schedule** dialog. You may then edit any details including the addition of personnel.

Can I record staff appraisal interviews?

Yes. The Identify Training Requirements wizard assumes that on-going training requirements are likely to be revealed as a result of reviews such as appraisal interviews. Allowance is therefore made in this dialog to record the date and type of review, and any notes you may wish to make.

These reviews are recorded in the user's **Training Profile** where you may gain direct access to all details including any notes made.

To respond to a formal tender document I need to identify personnel who have a relevant skill. Can I do this?

Yes. The Personnel Details routine allows you to isolate a specific skill and identify members of personnel who have this skill; an identical report means you may print out this information if required.

Can I record feedback on courses?

Yes. The **Course | Complete Course** dialog allows you to record notes and feedback from courses - see Updating or recording detailed course results.

This information updates the training record where, for instance, a member of staff may not have passed or fully completed a course, but has made some progress (or not) which needs recording.

Why do some documents associated with training appear as PDF files whilst others don't?

For later versions of Workbench the *Issue document to PDF format* workflow setting has been re-named *Convert document to PDF format* and offers a drop-down list allowing conversion to PDF at either Approval stage or on Issue of the document. Therefore, depending on each document's workflow setting configuration and status, documents may appear in different formats.

13 Menus at a glance

This page explains, very briefly, the purpose and scope of each menu item in the Training module.

File

Where Am I? Allows you to check the currently selected database. This is also displayed at the lower right side of the Workbench main window.

Who Am I? Shows your current Login ID and whether access rights are granted individually or via templates.

Login to Database... Here you may switch to another database without having to exit the system and re-enter. You will, however, still have to log in to the new database as users may have different access rights between databases. If you are already logged in to the system and wish to change who you are logged in as, while remaining connected to the same database, you may do so here.

User Preferences... If viewed in its entirety, this is a four-page dialog allowing you to set up various preferences covering the look and workings of your own machine. Here you may also change your own password and decide which other user(s) should be allowed to process tasks on your behalf, in case of absence. However, access to this menu item and to each individual page is controlled by the system administrator so the whole menu item or aspects of it may not be present.

View Issued Document... Allows you to view issued documents to which you have access. (Appears only when the Document Control module is also installed.)

Quick document links Providing that the Document Control module is installed, the Use document quick launch facility setting is set in the Workbench Configuration Centre | Workflow Settings (New User/Personal) and the *Number of links to most recently viewed documents* setting is set between 1 and 10, then the last viewed documents (up to a maximum of 10 and dependent on the *Number of links....* setting) will also be available for viewing here. They will be listed most recent first.

Workstation Settings... Allows the setting up of a default database and login that are automatically selected on future start-up. The default dictionary is also set here. Finally you may select which Workbench server to connect to and, optionally, whether the list of servers displayed should be restricted to only those that are running.

Exit Exit the program. A message asking you to confirm your wish to exit is displayed.

Personnel

Details Allows viewing and modification of basic personnel and user information.

Training

All menu items within the Training menu are concerned with training records.

Identify Training Requirements This item allows training requirements (courses, skills and qualifications) for a particular member of staff to be created, edited and deleted.

Identify Training Gained This item allows training gained (courses, skills and qualifications) to be recorded for one or more member(s) of staff.

View Training Requirements Shows the training requirements (courses, skills and qualifications) for a specified member of staff.

View Qualifications Shows the current qualifications for a specified member of staff.

Delete Qualifications Allows the deletion of qualifications for a specified member of staff.

View Profile Shows the total training profile for a particular user. Course, Skill and Qualification information is shown on individual tabs, where the entries may be filtered by various fields.

Course

The Course menu allows the maintaining, viewing and completing of courses.

Schedule Course Allows courses to be created, viewed, edited and deleted.

Complete Course Allows scheduled courses to be completed.

View Course Allows viewing of any scheduled or completed course.

Settings

Information likely to be used in the creation of training records is set up in the Settings menu.

Skill Allows skills to be created, viewed, edited and deleted.

Course Type Allows course types to be created, viewed, edited and deleted.

Course Allows courses to be created, viewed, edited and deleted.

Qualification Allows qualifications to be created, viewed, edited and deleted.

Review Type Allows review types to be created, viewed, edited and deleted.

Course Location Allows course locations to be created, viewed, edited and deleted.

Result Description Allows result descriptions to be created, viewed, edited and deleted.

Suppliers Here you may create and edit new records and maintain existing records of external suppliers and contacts.

User Defined Analysis | Supplier UDA Allows the creation of user-definable analysis categories for suppliers.

User Defined Analysis | Course UDA Allows the creation of user-definable analysis categories for scheduled courses.

Reports

Personnel Details Shows basic details for personnel who have attended a course, attained a skill or obtained a specified qualification.

Training Required This report shows the training required by one or more members of personnel.

Training Gained This report shows the training gained by one or more members of personnel.

Training Profile This report shows the training profile for one or more members of personnel.

Course Details This report shows the details of scheduled courses, including attendees.

Document Training This report is accessible from either the Training or Document Control module. It can be printed in Summary or Detail format and reports on all aspects of documents associated with training courses.

Requirements Summary This report shows the number of people with requirements for courses, skills, qualifications and/or document training.

User Defined Reports Shows queries and reports generated by Workbench ReportQuest (if installed).

Module

In this menu you may gain quick access to any other installed Workbench modules.

Audits You will only be able to use this menu item if you have the Audits module installed. If so, please refer to the Audits Help system for full details on its purpose and function.

Customer Care You will only be able to use this menu item if you have the Customer Care module installed. If so, please refer to the Customer Care Help system for full details on its purpose and function.

Document Control You will only be able to use this menu item if you have the Document Control module installed. If so, please refer to the Document Control Help system for full details on its purpose and function.

Nonconformities You will only be able to use this menu item if you have the Nonconformities module installed. If so, please refer to the Nonconformities Help system for full details on its purpose and function.

Personnel This module is installed as an integral part of all modules and facilitates all aspects of personnel administration on the system.

ReportQuest You will only be able to use this menu item if you have ReportQuest installed. If so, please refer to the ReportQuest Help system for full details on its purpose and function.

System Manager This module is installed as an integral part of all modules. It allows the system administrator to define and maintain all global system settings, manage individual user access to Workbench and to arrange user logins and passwords.

Test and Calibration You will only be able to use this menu item if you have the Test & Calibration module installed. If so, please refer to the Test and Calibration Help system for full details on its purpose and function.

Training You will only be able to use this menu item if you have the Training module installed. If so, please refer to the Training Help system for full details on its purpose and function.

Help

Contents Gives access to the Table of Contents for on-line Help.

Topic Search Gives an alphabetical index of all Help entries and allows you to type in and search for specific topics.

How to use Help Explains how to get the best out of your Help system.

About Workbench Gives information on the version of Workbench and the number / usage of licences.

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