



Unicorn HRO

Training Administration

You may choose to track basic employee training information, or you may use the expanded training module and set up class dates and times, track enrollment statuses, etc. At the simplest level, training can be defined and then recorded for each employee. On the other hand, in-house and outside training class schedules can be set up, enrollees can be assigned to classes, and competencies can be associated with these people once the courses have been completed. The following discussion outlines the scenarios that are available:

- Basic entry: define training classes and record the classes that employees have completed
- Training Course Administration: set up training classes; enroll employees in classes and track their statuses
- Training Course Administration and Competencies: in addition to setting up training classes, you may associate training, skills and certifications with each class. When the employee completes the class, the competencies are automatically written to the employee's record.

Function and COD names are indicated in bold type.

Basic entry

To track only the training classes that employees have completed, use the following functions:


Set up:	Training Group (COD)
	Training Class (COD)
	Training Types (COD)
	Training Definition
Employee data:	Training Information

After adding the common object values, training is defined in Training Definition. A class is defined with a Training Group, Training Type and Training Class.













Training Definition + add			
To update, click on information in the left column.			
Training Group	Training Type	Training Class	Action
Accounting	College Course	Advanced	view delete
Accounting	College Course	Basic Budgeting	view delete
Accounting	Conference	Capital Invest.	view delete
Accounting	Conference	Cash Management	view delete
Accounting	Conference	FASB Standards	view delete
Accounting	Conference	Stat. Analysis	view delete
Advertising	Seminar	Marketing Plans	view delete
Budgeting	Seminar	Basic Budgeting	view delete
Communications	Seminar	Recruiting	view delete
Computer	In-house Class	Beginner	view delete
Computer	Online	MS Access	view delete
Computer	Seminar	.NET Essentials	view delete


When an employee completes a course, record it in Training Information.

William C Fulton Jr
Employee Number: 615
Job Title: Business Analyst I
Division: Charlotte
Employment Status: Active
[Click to send e-mail message to employee](#)

Training Information  add

To update, click on information in the left column. Click on column label to sort.

Training Group ▲	Training Type	Training Class	Completed Date	Action
Accounting	Conference	Cash Management	02/02/2006	 view  delete
Computer	Online	MS Access	02/02/2006	 view  delete
Computer	Seminar	.NET Essentials	01/27/2006	 view  delete
Computer	Seminar	Web Security	05/18/2009	 view  delete
Computer	Seminar	Wireless Netwrk	03/24/2010	 view  delete
Driving	Professional	Def. Driving	05/20/2002	 view  delete

 add

Training Definition contains the Training Frequency In Days, so you can create a report to show which employees need to be re-trained, based on their last training date. Training can also be linked to specific positions in the **Job Titles** function.

In conjunction with training, you may also track skills and certifications.

Set up:	Skill Groups (COD) Skills (COD) Skill Levels (COD) Skills Definition
Employee data:	Skills
Set up:	Certifications (COD) Certification Definition
Employee data:	Certification

Skills and certifications may also be linked to jobs in **Job Titles**.

Training Course Administration – minimum features

To use the Training Course Administration function, below are the minimum areas that must be completed.

- Set up:
- Course Grade** (COD, where all values are user-defined)
 - Completion Status** (COD, where “COM” must represent Completed. Additional values may be entered as needed.)
 - Instruction Methods** (COD)
 - Vendor Codes** (COD)
 - Training Types** (COD)
 - Training Facilities** (define where courses are held)
 - Training Course Administration** (set up courses)
 - Training Schedule** (specify dates when courses are to be held)
- Employee data:
- Training Enrollment** (enroll employees)
 - Training History and Enrollment** (view history or enroll employees)
 - Training Schedule** (work with course dates or enroll employees)

This will allow you to track the courses that are available to employees, as well as record which classes the employees have completed, are enrolled in, and which classes are in progress. When you indicate that a person has completed a particular class in **Training Schedule**, the system will write a record to **Training History and Enrollment**.

After setting up Training Facilities, go to Training Course Administration and define courses.

Update Training Course Administration

* = Required

Training Course Details

Course Code: 2134

*Course Description: Advanced Leadership Communication Strategies

Instruction Method: Seminar

Class Hours: 18.00

Vendor: AMA

Continuing Education Units: 1.80

Training Type: Seminar

College Credits: 0.00

Course Materials

+ add

To update, click on information in the first column.

Material	Quantity	Optional	Action
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Pre-Requisites

+ add

Course Description	Action
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Tuition

+ add

To update, click on information in the first column.

Effective Date	Standard Cost	Discount Cost	Action
10/27/2009	2,545.00	2,295.00	delete
09/01/2006	2,295.00	2,095.00	delete

→ submit

cancel ←

After defining courses, set up course dates in Training Schedule.

Add Training Schedule

* = Required

Training Schedule

*Course Description: Advanced Leadership Communication Strategies

*Facility: Alpharetta, GA AMA Instructor Is Employee? ☐ Yes ☒ No

*Start Date: 08/25/2010 End Date: 08/27/2010

Minimum Enrollment: 0 Maximum Enrollment: 0

Agenda Document Path:

Instructor Name:

You may enroll groups of employees using either Training Enrollment (to enroll one or more employees) or Training History and Enrollment (to work with individual employees).



In Training Enrollment, you may select employees from various criteria. When the matching employees are displayed, you may enroll one or more in the selected class.


Achieving Leadership Success Through People


Facility: Alpharetta, GA AMA


Start Date: 06/01/2010

Add Training Attendee

Enter the Employee# or Last Name and click Refresh. Employee#:  Last Name:  refresh

Enter the Applicant# or Last Name and click Refresh. Applicant#: Last Name:  refresh

Find Applicants or Employees by Organization and/or Job Title. ☒ Employee ☐ Applicant Select:  organization

Selected Levels: Value Sol./ Florham Pk. [Clear Levels](#) Job Title:  refresh

Select Attendees to enroll and click Submit. Click on column label to sort.

Select All on Page UnSelect All			
Enroll	Attendee Number ▲	Last Name	First Name
<input type="checkbox"/>	1704653	Avellino	Bernard
<input type="checkbox"/>	451	Chang	Angie
<input type="checkbox"/>	452	Steele	Danielle
<input type="checkbox"/>	602	Smith	Alex
<input type="checkbox"/>	622	Rochester	Edward
<input type="checkbox"/>	641	Steinway	Robert
<input type="checkbox"/>	646	Gibson	Mel
<input type="checkbox"/>	665	Johnson	James

After employees have completed the class, update their status to Completed in either the Training Enrollment or Training Schedule function.

Update Training Enrollment

Training Course Details

Course Description:

Achieving Leadership Success Through People

Facility:

Alpharetta, GA AMA

Instructor Is Employee?

No

Start Date:

06/01/2010

End Date:

06/02/2010

Minimum Enrollment:

0

Maximum Enrollment:

0

Agenda Document Path:

Instructor Name:

Training Attendees

+ add

To update, click on information in the first column. Click on column label to sort

Update status of selected attendees to:

Completed

update

Select All on Page

UnSelect All

Delete Selected

Attendee Number ▲	Name of Attendee	Employee?	Completion Status	Select
1704651	Lee Jr, James	Yes	Enrolled	<input checked="" type="checkbox"/>
1704653	Avellino, Bernard	Yes	Enrolled	<input checked="" type="checkbox"/>
1704657	Lee, Sarah	Yes	Enrolled	<input checked="" type="checkbox"/>

+ add

← back

A record will be written to Training History and Enrollment for each employee who completed the course.

Bernard Avellino

Employee Number:

1704653

Job Title:

Manager - Mid Level

Division:

Florham Pk.

Employment Status:

Active

Training History and Enrollment

enroll

To View, click on information in the left column.

Course Description	Start Date	Status	Action
Achieving Leadership Success Through People	06/01/2010	Completed	view delete
AAA Defensive Driving	12/07/2008	Completed	view delete
.NET Essentials	09/11/2006	Completed	view delete
.NET Essentials	05/23/2006	Completed	view delete
Cash Management	03/01/2006	Completed	view delete
Italian Intermediate	03/01/2006	Completed	view delete
AAA Defensive Driving	01/01/2006	Completed	view delete

enroll

Training Administration – additional features

From Training Course Administration, additional information can be stored at the course level:

Course Materials: Record the materials that are typically used during this course. Examples would be overhead projectors, PCs, workbooks, etc. This function is optional, but must be used if you wish to reserve materials for specific courses in Training Material Assignment (see next section).

Training Prerequisites: If you wish to prevent people from enrolling in classes if they have not completed the prerequisites, enter them here. During the Training Signup process, a message will be displayed if the person has not taken the prerequisite course(s).

Training Tuition: Enter the standard price of the course here. You may also enter a discount price, such as for early enrollment or member pricing.

Update Training Course Administration

* = Required

Training Course Details

Course Code: 2134

*Course Description: Advanced Leadership Communication Strategies

Instruction Method: Seminar

Class Hours: 18.00

Vendor: AMA

Continuing Education Units: 1.80

Training Type: Seminar

College Credits: 0.00

Course Materials + add

To update, click on information in the first column.

Material	Quantity	Optional	Action
PC	1	no	delete
Projector	1	no	delete

Pre-Requisites + add

Course Description Action

Tuition + add

To update, click on information in the first column.

Effective Date	Standard Cost	Discount Cost	Action
10/27/2009	2,545.00	2,295.00	delete
09/01/2006	2,295.00	2,095.00	delete

Optional information that can be stored in Training Schedule at the class level includes:

Training Material Assignment: To reserve materials for this class, the user can select from materials that have first been defined for this course in Training Class Administration. Materials, quantity, and the person who reserved the materials can be stored.

Training Costs: This function stores all costs that are incurred by the company to provide training to an employee. Examples would be: tuition if an outside training vendor is used; room rental if an employee is used as an instructor, additional textbook costs, etc.

Update Training Schedule

* = Required

Training Schedule

Course Description: Achieving Leadership Success Through People

Facility: Alpharetta, GA AMA Instructor Is Employee? ☐ Yes ☒ No

Start Date: 06/01/2010 End Date: 06/02/2010

Minimum Enrollment: 0 Maximum Enrollment: 0

Agenda Document Path:

Instructor Name:

Training Material Assignment [+ add](#)

To update, click on information in the first column.

Material	From Date	To Date	Reserved By	Serial Number	Action
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Training Costs [+ add](#)

To update, click on information in the first column.

Cost Type	Cost	PO#	Vendor	Action
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Training Attendees

To update, click on information in the first column.

Update status of selected attendees to: [update](#) [Select All](#) [UnSelect All](#) [Transfer](#)

Attendee Number	Name of Attendee	Employee?	Completion Status	Select	Action
1704653	Bernard Avellino	Yes	Completed	<input type="checkbox"/>	delete
1704657	Sarah Lee	Yes	Completed	<input type="checkbox"/>	delete
1704651	Jane Lee	Yes	Completed	<input type="checkbox"/>	delete

The following reports can be run:

Course Availability Report: Basic course information is printed with the dates and locations of the selected course.

Course Enrollees List: This report prints all employees who are enrolled in the selected course, with basic information relating to the course such as start and end dates and facility location.

Course Schedule Report: Basic course information is displayed with the dates and locations of the selected course.

Training Administration – full module

In addition to the functions previously described, you may link competencies to training courses in the following functions, which in turn will update employee competencies when courses are completed. These are the requirements:

Associate a course with any or all of the following:

- **Training Definition**
- **Skills Definition**
- **Certification Definition**

When the employee completes the training course, the associated competencies will be automatically assigned to him/her in **Training Information, Training History and Enrollment, Skills and Certifications**.

For example the Software Quality Assurance course is associated with the Test Case Design skill in the Business Analyst skill group:

Update Skill Definition

* = Required

Definition Details

Skill:

TestCase Design

Skill Group:

BusinessAnalyst

Skill Level:

L3 Associate

Training Courses

+ add

To update, click on information in the first column.


Course Code	Course Description	Action
ama832942	Software Quality Assurance	<div>X delete</div>

→ submit



cancel ←


This employee was enrolled in the class. When his status was changed to “Completed” in Training Schedule, the system automatically wrote a record to the Skills function:

Dennis Schwartz
Employee Number: 330
Job Title: Technician
Dept: Alpine Ski
Employment Status: Active

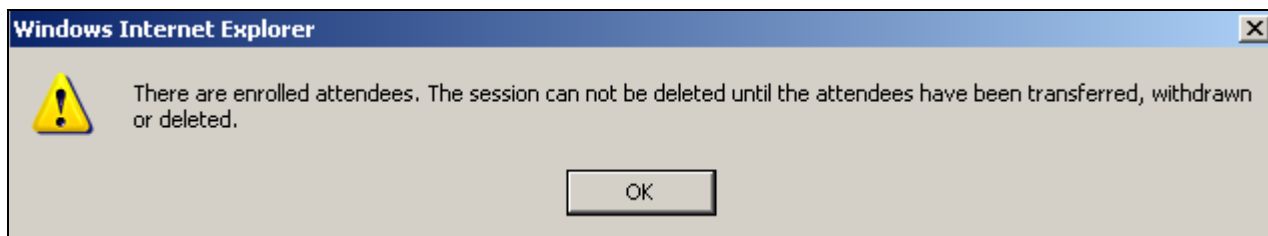
Skills  add

To update, click on information in the left column.

Skill	Skill Group	Skill Level	In Use	Last Used	Action
TestCase Design	BusinessAnalyst	L3 Associate	Yes		 view  delete

 add

If you need to cancel a class in Training Schedule and people have already been enrolled, a message will appear:



You may transfer the existing enrollees to another course by selecting the people to be transferred and clicking on the Transfer button

Start Date:	06/01/2010	End Date:	
Minimum Enrollment:	10	Maximum Enrollment:	25
Agenda Document Path:			
Instructor Name:			

Training Material Assignment + add

To update, click on information in the first column.

Material	From Date	To Date	Reserved By	Serial Number	Action
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Training Costs + add

To update, click on information in the first column.

Cost Type	Cost	PO#	Vendor	Action
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Training Attendees

To update, click on information in the first column.

Update status of selected attendees to: update

[Select All](#) [UnSelect All](#) [Transfer](#)

Attendee Number	Name of Attendee	Employee?	Completion Status	Select	Action
472	Katherine Elliott	Yes	Enrolled	<input checked="" type="checkbox"/>	delete
462	Corbin Jones	Yes	Enrolled	<input checked="" type="checkbox"/>	delete
467	Shyan Jones	Yes	Enrolled	<input checked="" type="checkbox"/>	delete
631	Joan La Rue	Yes	Enrolled	<input checked="" type="checkbox"/>	delete
465	Isabelle Sanborn	Yes	Enrolled	<input checked="" type="checkbox"/>	delete

→ submit cancel ←

If you try to enroll more than the maximum number of attendees, a message similar to the following will appear.

Aligning Marketing and Sales

Facility: Annapolis, MD LT
Start Date: 06/01/2010

Add Training Attendee

Enter the Employee# or Last Name and click Refresh. Employee#: Last Name: refresh

Enter the Name a refresh

Find Ap Organiz refresh

Select refresh

Windows Internet Explorer

The following errors have occurred:

* Aligning Marketing and Sales is full. Please try another available session.

OK

Select Attendees to enroll and click Submit. Click on column label to sort.

Select All on Page UnSelect All			
Enroll	Attendee Number ▲	Last Name	First Name
<input type="checkbox"/>	6030	Thompson	Patricia
<input type="checkbox"/>	675	Smith	Carla

→ submit cancel ←

You may select another session in which to enroll the employees.