
EM-Pro Employee Training Management

User Guide



www.pister.com

Version 4.0

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Overview

The software offers a complete system for:

- Scheduling Training
- Maintaining historical records of all training for an employee

Set Up Information

Practical information is recorded during the initial set up process. Some of the key elements include:

- Schedule training if there is a course revision
- Schedule training for a department
- Picture of employee
- Multiple courses for a particular category
- Company Logo on reports
- Custom fields that are user defined
- Screen/Report field titles changeable (terminology or language)

Reporting Flexibility

The criteria for identifying the training elements to be included in the selected report are user determined. Filtering and ordering the report can be based on:

- Date range
- Employee Id, Department
- Specific category of courses

Training Reports

A number of highly focused reports can be generated:

- Employee Detail
- Training Due
- Employee History
- Training and Sign Off Form
- Department Matrix

General Elements

Other useful features include:

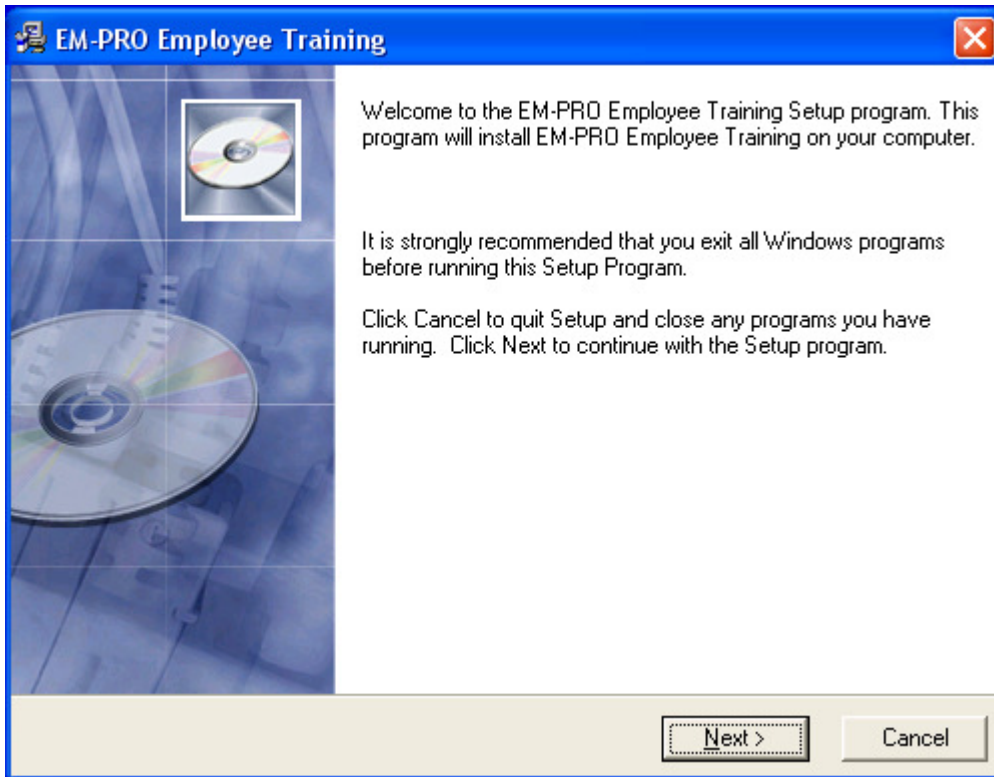
- Password protection for the system
- Language considerations for screens and reports
- E-Mail reports
- Export reports to files (word processor, spreadsheet, adobe - pdf)

Procedure to Install

Place the EM-Pro Employee Training software CD in the drive.

Use Windows Explorer to select the folder titled **EM-ProV4** and then select the folder **TrainingLogProgram** on the CD. Double click on the file **SETUP.EXE**.


A screen similar the one shown below will appear.





It is highly recommended that all default settings be kept.

Follow the screen instructions by pressing the **Next** button until the installation is complete and then press the **Finish** button.

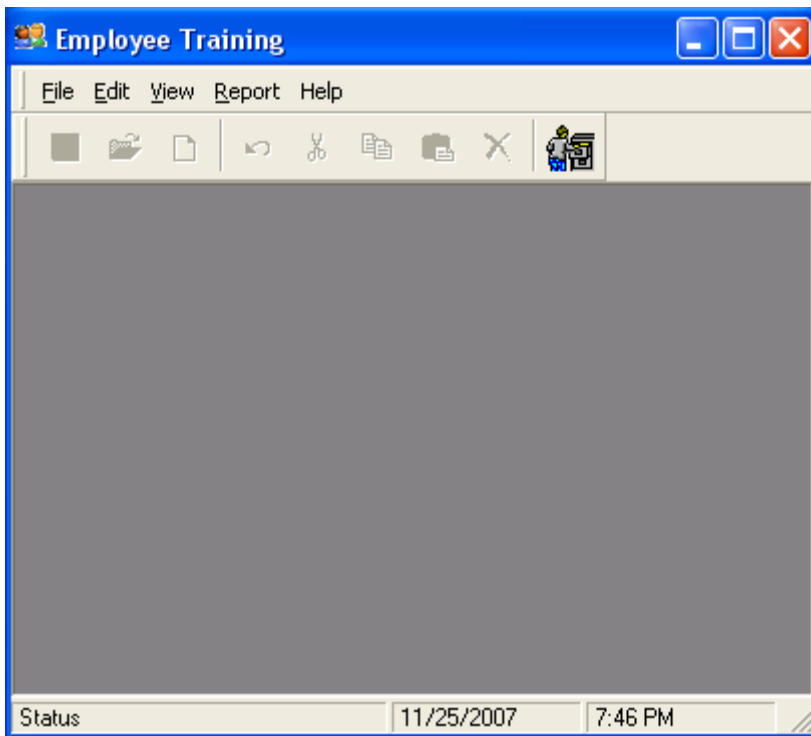
Start Program

Click the  button on the Windows task bar.

Point to  and select the **EM-Pro** folder.

In the **EM-Pro** folder, double click on the Employee V4  icon.

The main screen is similar to:

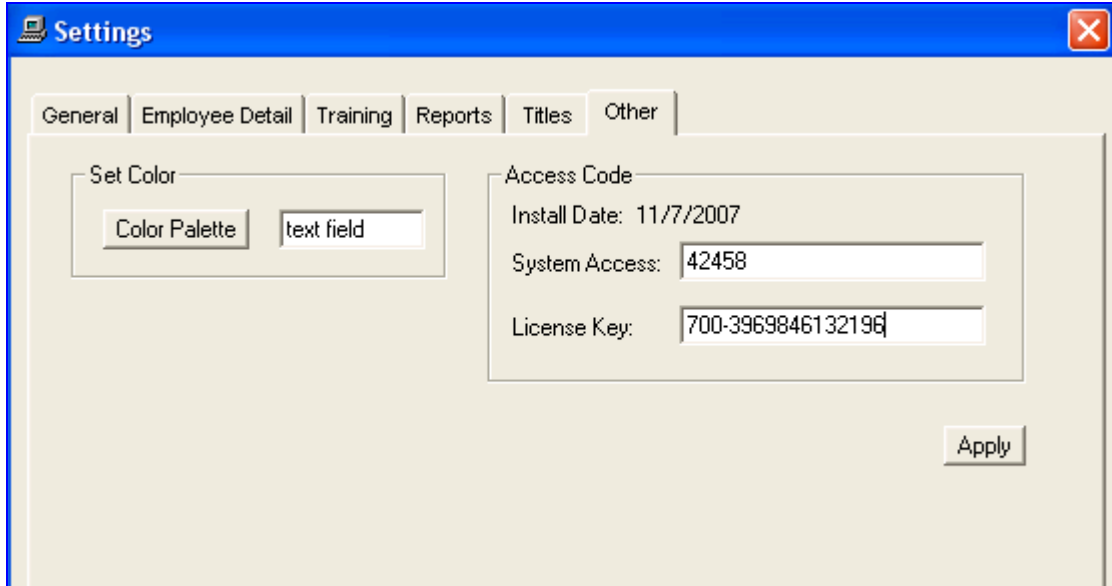


System Access Code and License Key

The software is fully functional, however it remains a restricted (time and number of records) use version until it is unprotected.

To remove the protection, click on the **View** menu item. From the pull down menu, select **Settings**.

In the settings screen, click on the tab titled **Other**.



In the top segment of the access code frame an **Install Date** is displayed.

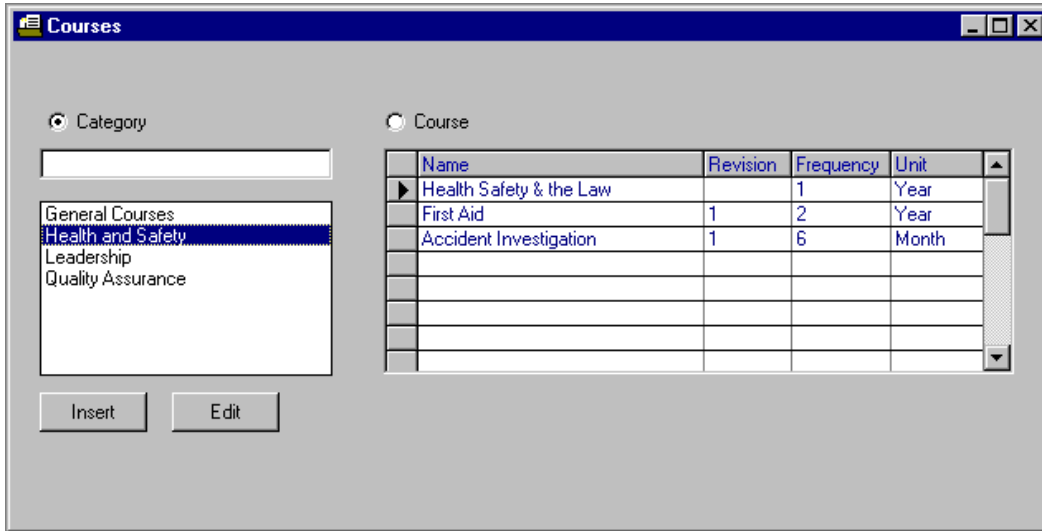
Please provide this install date to us by e-mail to **support@pister.com** or calling at **(905) 886-9470**. We will then provide you with the appropriate system access code and license key.

Course Category



A full list of courses must be specified in order to assign them to the employees. Courses are organized into categories. There is no limit as to the number of categories. Each category can contain up to 20 courses.


To Access Click File, Courses from Start up screen


Sample



As you click on a category in the list, the associated courses are shown in the course grid.

To add a category, make sure the Category option is set and key in the category name in the text entry box corresponding to category. Click the  new icon on the tool bar. This will add the category to the end of the list. Click the  command button to insert a category before the currently highlighted category.

If you want to modify a particular category, highlight it and re key in the category name in the text entry box. Then use the  button.


To remove a category, highlight it and use the delete icon on the toolbar . The category list must be saved to complete the delete. Any related courses will also be removed.

Finally, to save the category list, click the save icon on the toolbar .


Courses

Once a category is in place, you can add up to 20 courses for it. This is done by highlighting the desired category and clicking on the Course mode option button.

To add a course, type in the course name, and revision and frequency if desired. The frequency unit is a drop down list. You can select the unit from the list or type the first letter of the unit. The course grid has 20 rows available for courses to be added. Courses are to be added in the first available empty row.

To save the course list, click the save icon on the toolbar .

If you want to modify a particular course, key in the changes in the grid. After any edits are performed, you must click the save icon.

To remove a course, highlight it and use the delete icon on the toolbar . A confirmation pop up screen will be displayed. Once confirmed, this course will be removed from all tables except the employee history. Only one course can be deleted at a time.

Course Revision

If a course revision is modified and it has been assigned to a particular employee, the employee will immediately be scheduled to retake the course. This is described in detail under the Assigned Courses section.

If a course has a frequency assigned, it will automatically be rescheduled after it is completed according to this frequency.

Once you have a set of categories and courses set up, they can be assigned, scheduled and added to employee history.

Employee Detail Settings

Before adding employees to the database, you should set up the list of positions, departments, inactive reasons and custom fields. These features are used to make the set up of an employee record simpler.

To Access Click View Settings and select the Employee Detail tab

Sample

The screenshot shows a software window titled "Employee Detail" with several tabs: General, Employee Detail (selected), Training, Reports, Titles, and Other. The window is divided into four main sections:

- Custom Field Names:** Five empty text input boxes numbered 1 through 5, with an "Apply" button to the right.
- Inactive Reasons:** A list box containing "Retired" and "Maternity leave", with "Delete" and "Apply" buttons to the right.
- Departments:** A list box containing "Accounting", "Engineering Department", "Maintenance", "MIS", "Production", and "Quality", with "Delete" and "Apply" buttons to the right.
- Positions:** A list box containing "Apprentice Oper.", "Electrical Maint.", "Lab Layout Engineer", "Press Operator", "Programmer", "Set Up Man", and "Tool Room Tech.", with "Delete" and "Apply" buttons to the right.

The custom fields are five additional fields that can be added to the employee detail record. They are specified once and apply to all employee records.

The inactive reasons are a list of reasons that an employee is marked as not active.

The departments are a list of valid departments that an employee can be a part of.

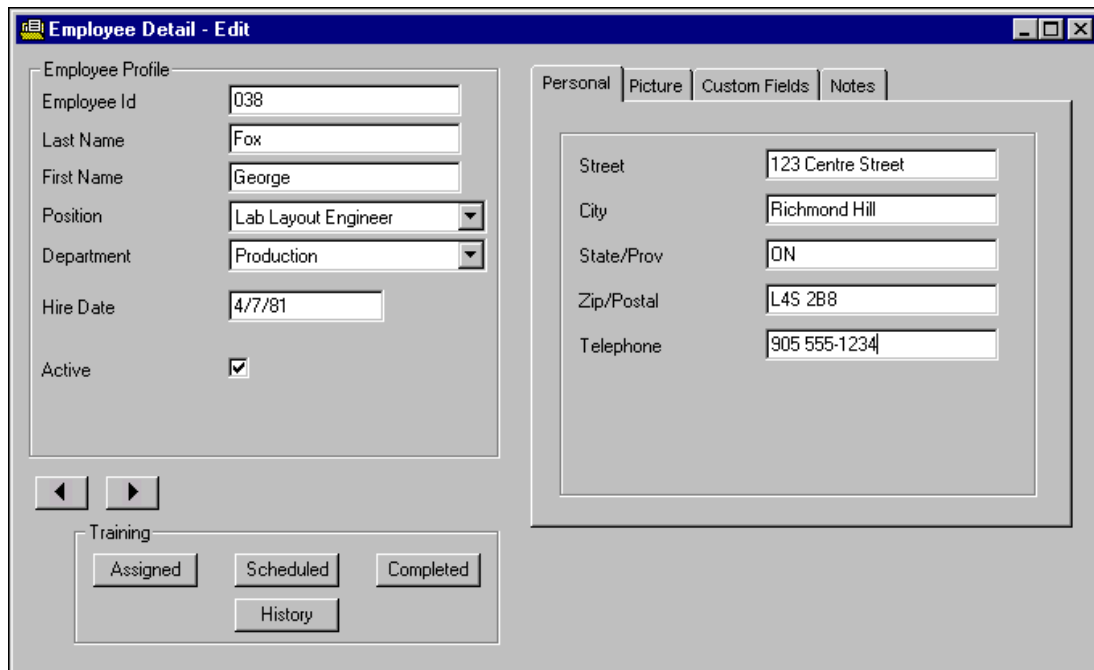
The positions are a list of valid positions to assign to each employee.

To add entries, key in the information and click apply. Delete is used to remove an entry from the list. When an entry is deleted, it is marked as "*del". Click apply to permanently remove it.

Employee Detail

The employee detail screen is used to add employee records to the database. In addition, it is used to view the completed course history and add individual course completion records.

To Access Click File, Employee from Start up screen



The screenshot shows a software window titled "Employee Detail - Edit". The window is divided into two main sections. The left section, titled "Employee Profile", contains several input fields: "Employee Id" (038), "Last Name" (Fox), "First Name" (George), "Position" (Lab Layout Engineer), "Department" (Production), "Hire Date" (4/7/81), and an "Active" checkbox which is checked. Below these fields are two navigation arrows and a "Training" section with buttons for "Assigned", "Scheduled", "Completed", and "History". The right section, titled "Personal", has tabs for "Personal", "Picture", "Custom Fields", and "Notes". The "Personal" tab is active, showing fields for "Street" (123 Centre Street), "City" (Richmond Hill), "State/Prov" (ON), "Zip/Postal" (L4S 2B8), and "Telephone" (905 555-1234).

Each employee record must have a unique employee id. Employee id is an alpha numeric field of up to 20 characters.

Employee positions and departments are selected from a drop down list.

Various general fields are available as shown above. In addition, you can specify up to five custom fields in order to add more information for each employee record. The custom fields are entered by clicking the custom fields tab.

Each employee record can have a picture file associated with it.







Finally, you can add a memo field of notes to each employee record in order to store information that may be of future use.

Once the required information is entered, it can be saved using the save icon.

All the data entered on this screen can be viewed on the Employee Detail Report. To generate this report, click Reports, Employee Detail Report. This report can only be generated from this screen.

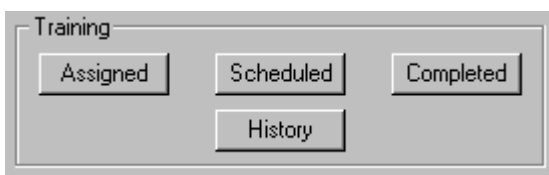
To view the current employee's history report, click Reports, Employee History. The history report can be generated from the start up screen. In addition, you can perform some filtering using report options. This is detailed later.

Command Buttons

	Save current employee record
	Create a new employee record
	Find a particular employee record from a list or key in the employee id
	Move to the next or previous employee record
	Delete the current employee record including all completed history
	Undo all the changes to the current employee record.

Employee Training

For the current employee, you can enter, view and modify the assigned, scheduled and completed courses.



Assigned courses are those courses that are to be automatically scheduled if there is a change in the course revision.

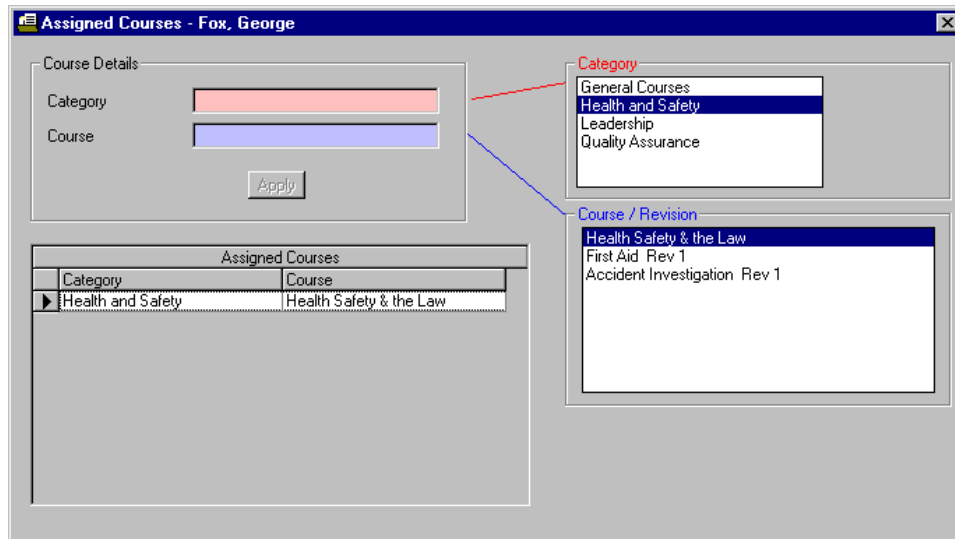
Scheduled courses are those courses that are to be automatically rescheduled when they are entered as being completed. This will only take place if the course has a frequency associated with it.

Completed courses are courses that have been taken. They will be listed in the history table.

Assigned Training

By clicking the command button, you can pick the courses that you want to assign to the current employee. As mentioned before, if the revision is changed for any of these courses, the course will be automatically scheduled. The scheduled date will be the current system date.

A sample screen follows:



To add an assigned course, double click the category and then the desired course. To save the selection, click the icon.

To remove an assigned course, select it in the assigned course list and click the delete icon on the toolbar .


Scheduled Training

By clicking the **Scheduled** command button, you can pick the courses that you want to schedule for the current employee. If a scheduled course has a frequency then upon completion it will be rescheduled. Otherwise, it will be saved as completed and removed from the scheduled table.

A sample screen follows:

Scheduled Courses		
Category	Course	Sched Date
Leadership	Team Oriented Problem Solving	1/15/08

To add a scheduled course, double click the category and then the desired course. Enter the scheduled date. To save the selection, click the **Apply** icon.

To remove a scheduled course, select it in the scheduled course list and click the delete icon on the toolbar .

To obtain a list of employees scheduled for training, refer to the Training Due report section of this guide.

Completed Training

By clicking the command button, you can record a course completion. If this course was scheduled, then it will automatically be rescheduled if a course frequency was set up. If no course frequency exists, the course will be removed from the scheduled list (if found there).

A sample screen follows:

Completed Training - Fox, George

Course Details

Category: Quality Assurance

Course: SPC I

Revision: 1.0

Complete Date: 5-20-14

Cost: 480

Hours: 8

Apply

Category

- General Courses
- Health and Safety
- Quality Assurance
- Leadership

Course / Revision

- SPC I Rev 1.0
- SPC II Rev 2.0
- Problem Solving Rev 1.0
- Design of Experiments Rev 1.0
- FMEA
- Audit Preparation

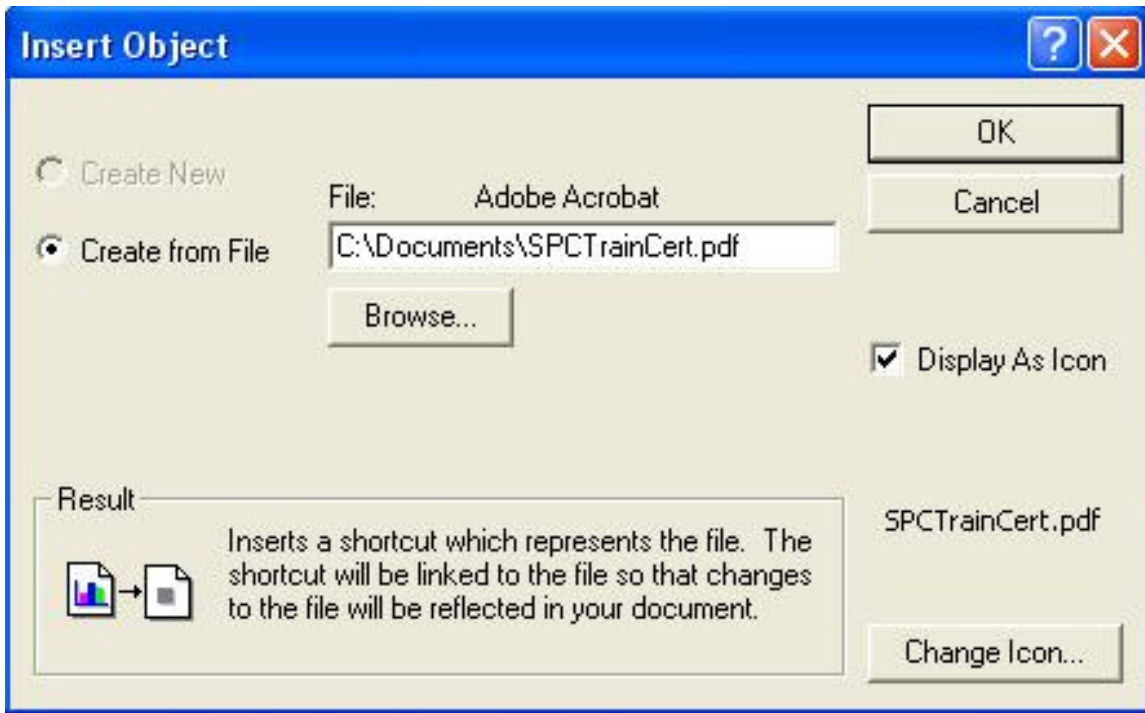
Link

Link

Remove

To add a completed course, double click the category and then the desired course. Enter the complete date. In the above example, two training field names (cost, hours) were set up using View , Settings, training tab. Up to five fields can be added. This enables you to save more details with a course completion record.

An external document (e.g. course certificate) can be linked with this training record. To link an external document, click on the **LINK** button and browse to the document.



Click on the **OK** button to save the linked document information.

An Icon of the linked document will appear in the Link frame. To view the linked document, double click on the document icon.



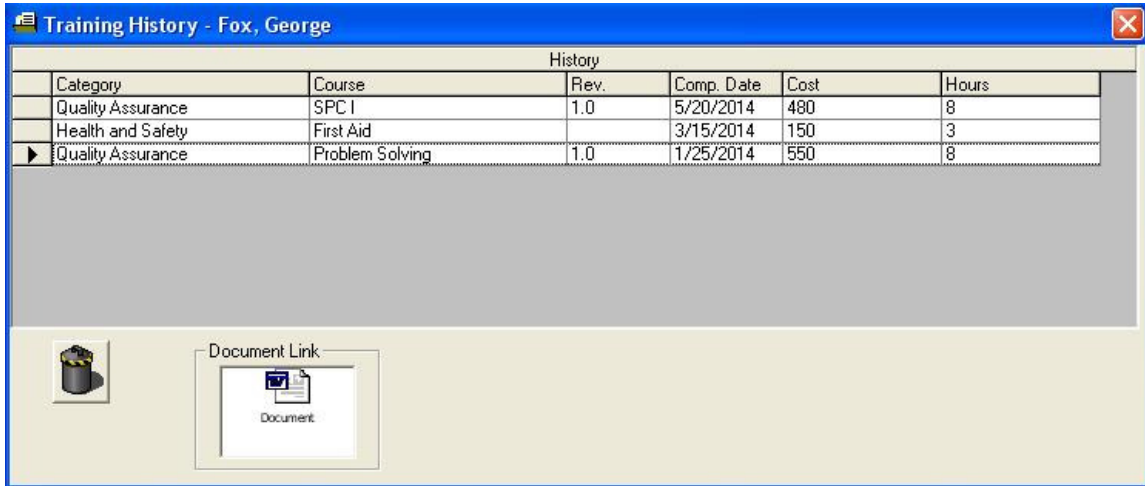
To save the training record, click the  icon.

A training record cannot be added without specifying the category, course and complete date. The revision information is taken from the course information as specified under File, Course.

History

The history screen displays a table of all completed training records. This table is ordered by completion date starting from the most recent entry.

The completed training records can be viewed by clicking the History command button.




History					
Category	Course	Rev.	Comp. Date	Cost	Hours
Quality Assurance	SPC I	1.0	5/20/2014	480	8
Health and Safety	First Aid	1.0	3/15/2014	150	3
▶ Quality Assurance	Problem Solving	1.0	1/25/2014	550	8


Document Link

Document

Additional detail will appear upon clicking the row of a training record.

If there is a linked document for a training record, the frame titled Document Link along with a document icon will be displayed. The linked document can be launched by double clicking on the document icon link.

A training record entry can be deleted by highlighting it and clicking the delete icon on the toolbar .

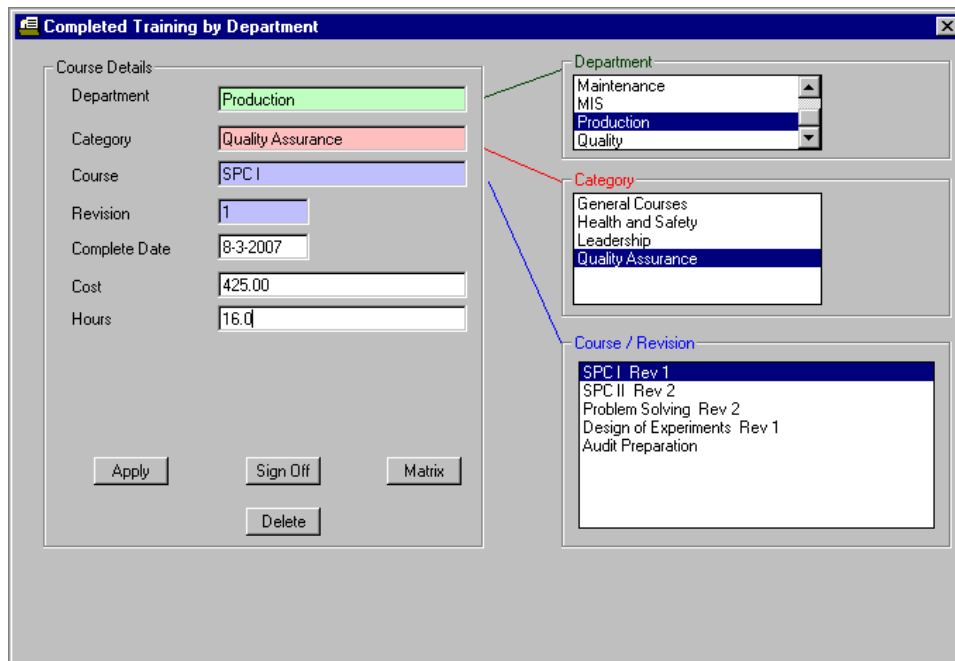
A range of training records can be removed by using the purge command . On the purge pop up screen, specify the completed date range to permanently remove courses.

The employee history report can be generated from the employee detail screen by clicking Employee History on the Reports pull down menu.


Department Training

Another option for adding training information is to do it for an entire department of employees.

To Access Click File, Department, Completed Training from Start up screen



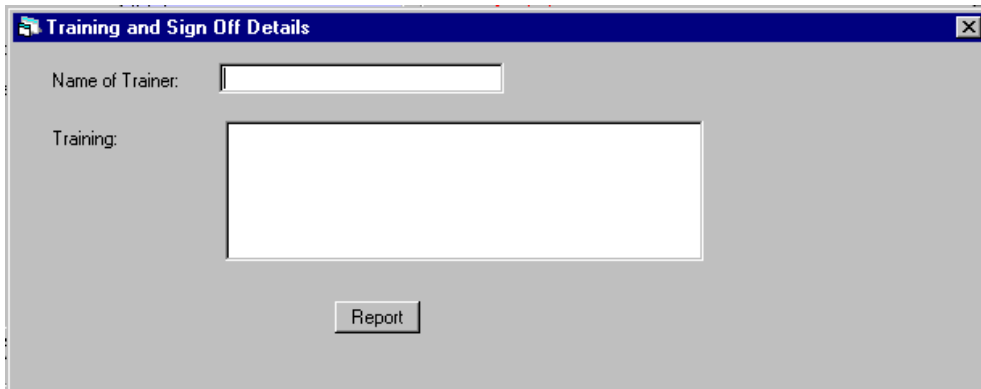
The above screen illustrates the addition of a course for all employees currently saved with a department of "Production". In order to add a course, you must select the department, category and course from the list boxes. This is done by double clicking the desired entry. Then you must specify the completion date. The additional fields in this example (cost, hours) were added using View, Settings, training option. If required, you can specify three more for a total of five additional fields to associate with each history record.

Once the desired information is entered, click the  icon to commit the change.

Records will not be saved without a department, category, course and completion date specified. The revision information is taken from the course information as specified when setting up the courses. It cannot be specified here. In order to change the revision, you must click File, Courses.

Sign Off

Once the course is saved, you can generate a Training and Sign Off Form. The report will list all employees in the current department who have taken the specified course on the entered completion date (or who are planned to take it). This form can be used as a course participation list. Once you click the sign off button the following screen will be displayed:



The screenshot shows a window titled "Training and Sign Off Details". Inside the window, there is a text input field labeled "Name of Trainer:" and a larger text area labeled "Training:". At the bottom center of the window is a button labeled "Report".

Before clicking the report command, you can enter the name of trainer and any notes you want displayed at the top of the report. In addition, the completion date from the department training screen and course name will be displayed.

The sign off report can be generated any time by specifying the department, course and completion date.

Once the course actually takes place, if any employees are not in attendance then you can remove the completed training record for these employees by advancing to their employee detail screen, clicking the History command button and removing the appropriate record.

Department Training Matrix

This report will show all employees in the specified department and indicate when they have completed the specified category of courses.

The courses are listed across the top of the report as 1, 2, 20. A legend will be displayed at the bottom of the report.

The employees are listed down the first column. For every course, the latest completion date will be displayed, if applicable.

Production Department Matrix												
Employee	1	2	3	4	5	6	7	8	9	10	11	12
Fitch, Bill		11/15/07	12/15/07									
Fox, George	06/12/05	11/15/07	12/15/07									
Franklin, Jim		11/15/07	12/15/07									
Health and Safety Courses												
	1 Health Safety & the Law										2 First Aid	
	3 Accident Investigation											

Similar to completed department training, you can specify assigned and scheduled courses at the department level.

These functions are accessed by clicking File, Department, Assigned Courses or Scheduled Courses.

Department Assigned Courses

To assign a course for an entire department, you must specify the department, category and course name. This course will then be assigned to all employees who are currently associated with the specified department.

It is possible to remove a course assignment for an entire department, if necessary, by using the delete command button.

Department Scheduled Courses

To schedule a course for an entire department, you must specify the department, category and course name. In addition, the scheduled date is required. This course will then be scheduled for all employees who are currently associated with the specified department.

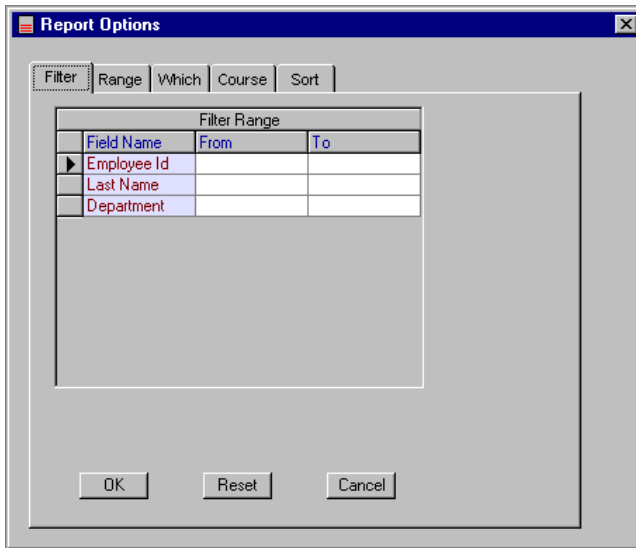
It is possible to remove a scheduled course for an entire department, if necessary, by using the delete command button.

Report Options

Report options are available to generate the employee history report.

To Access Click Report, Report Options from Start up screen

Sample



Using the Filter tab, you can specify a set of employee records. An example would be to generate a history report for all employees in the production department. Type in Department in the From column. To generate a report for employees with a last name beginning with "S", type in "S" in the from column and "SZ" in the To column.

Use the Range tab to specify if the report should list all the history or a date range of history.

The Which tab can be used to select all active, inactive or both employees. If inactive employees is selected, you can further filter to only report on a particular inactive reason.

The Course tab is used to specify a particular course when generating the Training Due report. It will provide a list of all employees scheduled to be trained in the specified course.

The Sort tab is used to specify the sort order for the training due report. The default is to generate the report by Employee id. Other options are Employee last name, Course or scheduled date.

Reports

The employee training system can generate the following reports:

- Employee Details
- Employee List
- Employee History
- Department Matrix
- Course Sign Off Sheet
- Training Due
- Training Due for a Courses

The department matrix and course sign off sheet are available under department completed training. They are described in the department training section of this document.

The Employee Detail report is available from the Reports pull down menu when the Employee detail screen is displayed. The report includes all information for the current employee.

Employee List Report

This report lists employees including associated department and position.. The report can be sorted and filtered (active/in-active) using Report Options selections.

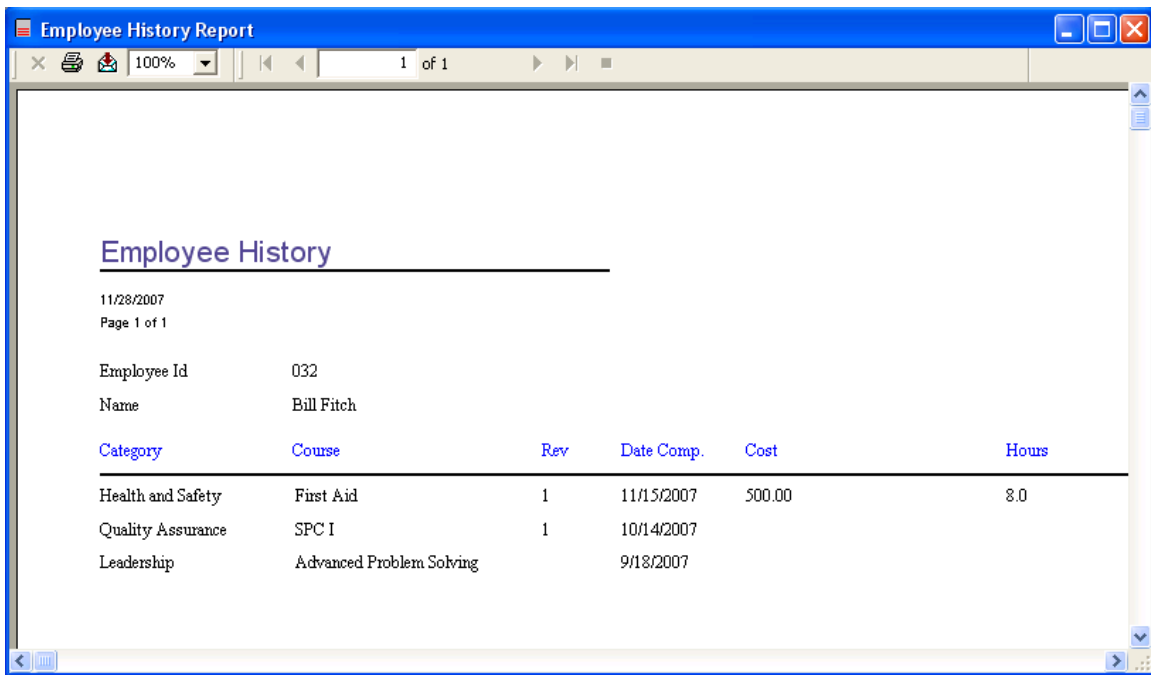


The screenshot shows a web browser window displaying the 'Employee List' report. The browser's address bar shows '1 of 1' and the page is zoomed to 100%. The report title 'Employee List' is centered at the top. Below the title, the date '8/6/2014' and 'Page 1 of 1' are displayed. The status is 'Active Employees'. The report content is a table with five columns: Employee Id, Last Name, First Name, Department, and Position. The table lists three employees: Bill Black (Maintenance, Electrician), John Smith (Quality, Inspector), and Frank Sun (Manufacturing, Lead Press Operator).

Employee Id	Last Name	First Name	Department	Position
B-002	Black	Bill	Maintenance	Electrician
A-001	Smith	John	Quality	Inspector
C-003	Sun	Frank	Manufacturing	Lead Press Operator

Employee History Report

The Employee History report is available from the Employee detail screen. From this screen, it will list all history for the current employee displayed. In addition, this report can be generated from the Reports pull down menu. It will generate the history report for all employees. Prior to generating the report, you can use report options to filter on a specific of employees and limit the history to a specific date range.



Employee History

11/28/2007
Page 1 of 1

Employee Id 032
Name Bill Fitch

Category	Course	Rev	Date Comp.	Cost	Hours
Health and Safety	First Aid	1	11/15/2007	500.00	8.0
Quality Assurance	SPC I	1	10/14/2007		
Leadership	Advanced Problem Solving		9/18/2007		

Training Due Report

The Training Due report will display all training that is scheduled. Use Report Options, Range to specify the date range if a specific time period is required. Otherwise all overdue training will be provided.

Employee Id	Name	Category	Course	Revision	Scheduled Date
032	Bill Fitch	Quality Assurance	Design of Experiments	1	1/16/2008
032	Bill Fitch	Leadership	Advanced Problem Solving	1	12/9/2007
038	George Fox	Leadership	Team Oriented Problem Solving	3	1/15/2008
038	George Fox	Quality Assurance	SPC II	2	1/14/2008
044	Jim Franklin	Leadership	Working in Teams	E	1/25/2008

Training Due for a Course Report

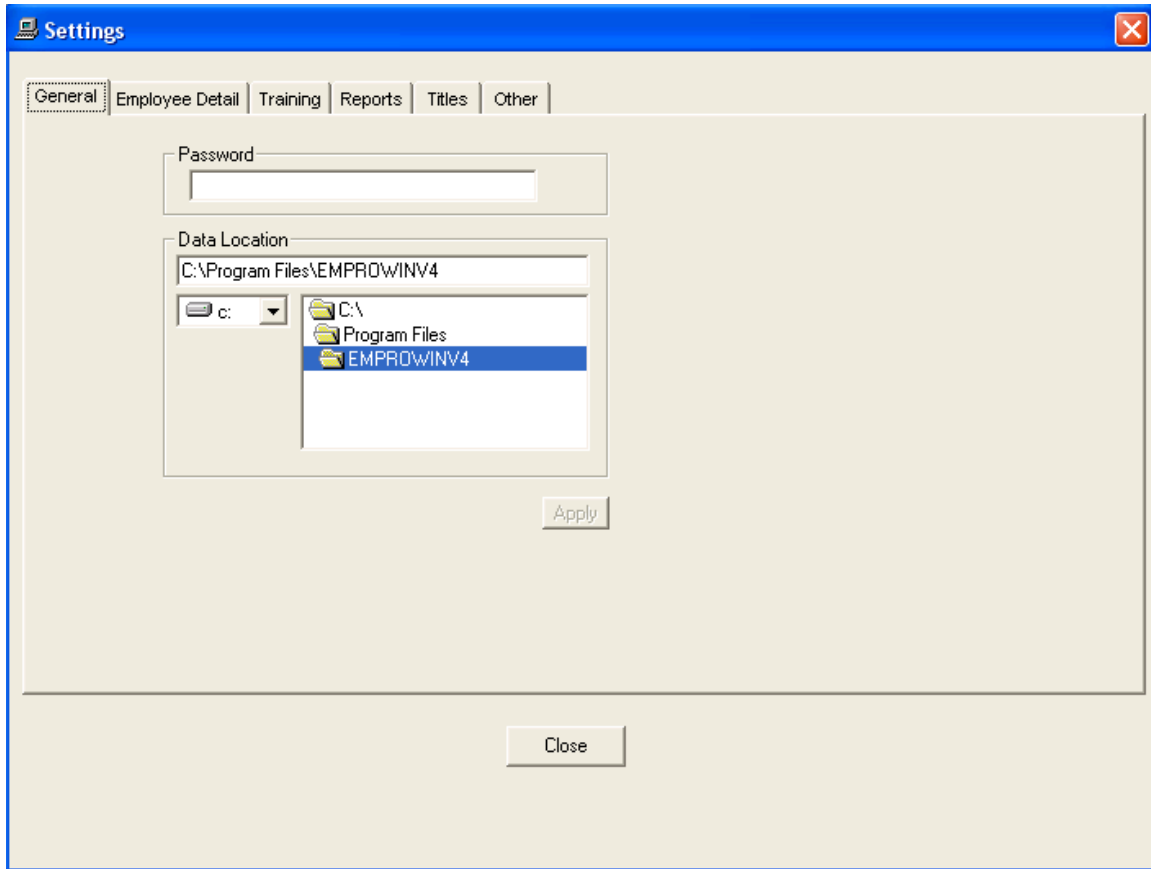
The Training Due for a Course report will list all employees requiring training in a specific course. Use Report Options, Course tab to specify the course. A specific date range can also be specified.

Employee Id	Name	Department	Scheduled Date
032	Bill Fitch	Production	2/15/2008
038	George Fox	Production	1/14/2008
044	Jim Franklin	Production	3/16/2008

General Settings

The location of the database, optional password setup and other elements are modified by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **General** tab.



Fields - Buttons	Description
Password	Restricts access to system - optional
Data Location	Identify drive and folder where data base is located
Apply Button	Saves the settings

The database file name is EmployeeV4.MDB. This file must reside in the specified data path location. The file is initially installed into the following default location: c:\program files\emprowinv4

Employee Detail Settings

A list of departments, positions and inactive reasons needs to be setup initially.

These lists will be available during the process of entering the employee details.

Custom field names provide the user the opportunity to record things that are unique to their operation. They can be used to narrow down what you want to report on as well.

Click on the menu item **View** and from the pull down **Settings**.

Click on the **Employee Detail** tab.

The screenshot shows the 'Settings' dialog box with the 'Employee Detail' tab selected. The dialog is divided into four main sections:

- Custom Field Names:** A list of five input fields. The first field contains the text 'Shift'. An 'Apply' button is located to the right of the list.
- Inactive Reasons:** A list box containing 'Retired' and 'Maternity leave'. 'Delete' and 'Apply' buttons are to the right.
- Departments:** A list box containing 'Accounting', 'Engineering Department', 'Maintenance', 'MIS', 'Production', and 'Quality'. 'Delete' and 'Apply' buttons are to the right.
- Positions:** A list box containing 'Apprentice Oper.', 'Electrical Maint.', 'Lab Layout Engineer', 'Press Operator', 'Programmer', 'Set Up Man', and 'Tool Room Tech.'. 'Delete' and 'Apply' buttons are to the right.

A 'Close' button is located at the bottom center of the dialog.

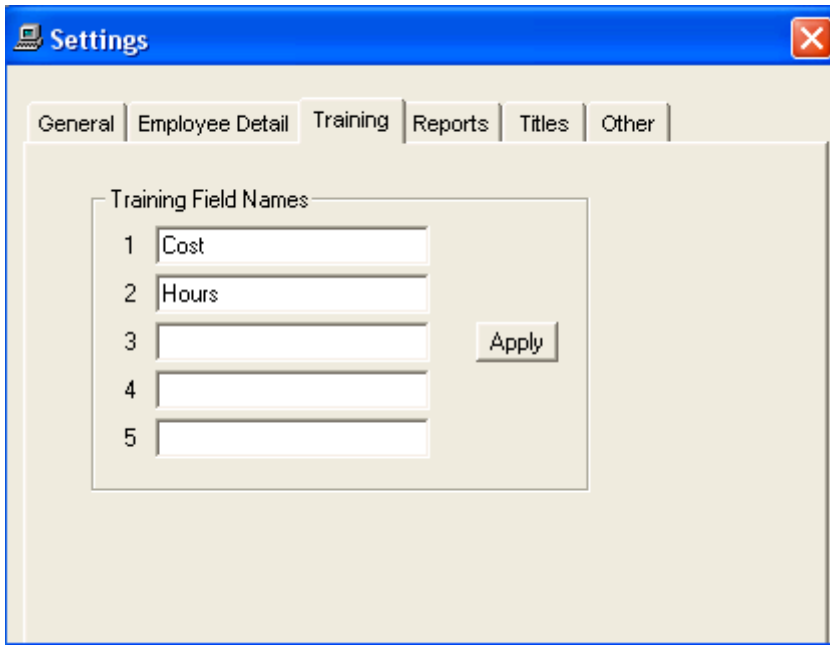
Training

When recording a completed training for an employee, additional items that are unique to your operation can also get saved.

There are five additional training related fields that can be setup.

Click on the menu item **View** and from the pull down **Settings**.

Click on the **Training** tab.



The screenshot shows a software window titled "Settings" with a blue header bar. Below the header is a tabbed interface with five tabs: "General", "Employee Detail", "Training", "Reports", "Titles", and "Other". The "Training" tab is selected. Inside the "Training" tab, there is a section titled "Training Field Names" containing five numbered input fields. The first field is labeled "1" and contains the text "Cost". The second field is labeled "2" and contains the text "Hours". The third, fourth, and fifth fields are labeled "3", "4", and "5" respectively and are currently empty. To the right of these fields is an "Apply" button.

Report Settings

The default report settings for items such as report header, form numbers and other elements are setup here.

Click on the menu item **View** and from the pull down **Settings**.

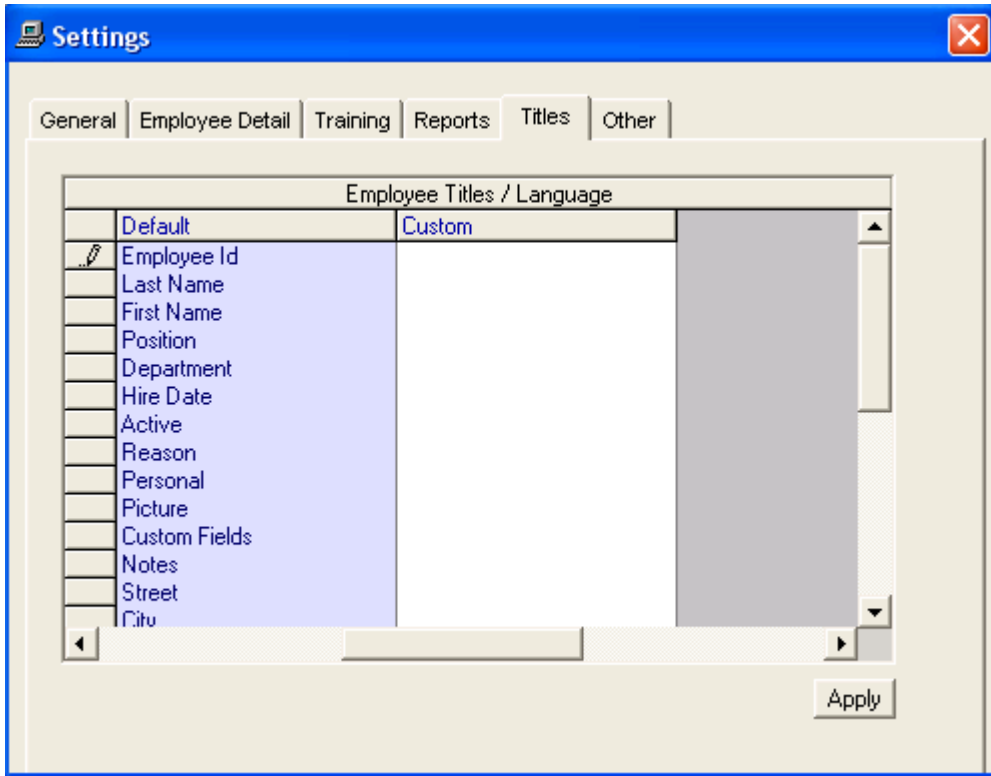
Click on the **Reports** tab.

Fields - Buttons	Description
Report Header	Typically company name – will appear on all reports at top
Report – Print Picture	Print employee picture on hard copy reports
Form Numbers	Form numbers can be assigned to various reports
Company Logo	Identifies location of company logo file
Apply Button	Saves report settings

Language Settings

The text labels displayed on various windows can be modified (different language) by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **Titles** tab.

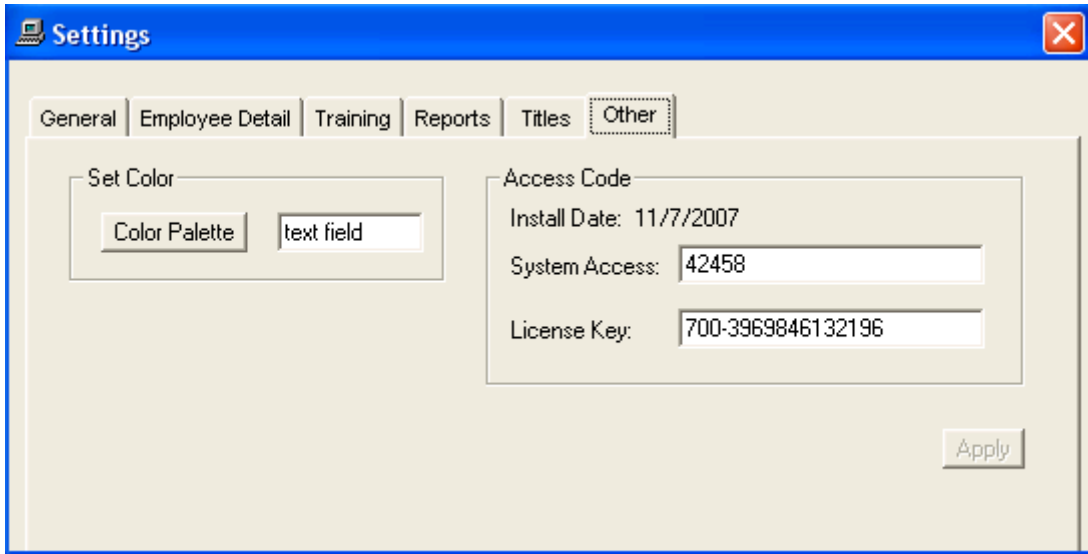


Fields - Buttons	Description
Custom	Replaces current label title with user entered label
Apply Button	Saves title label settings

Other Settings

The system access code, license key, text color and other elements can be modified by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **Other** tab.



The screenshot shows a window titled "Settings" with a blue title bar and a close button (X) in the top right corner. The window contains several tabs: "General", "Employee Detail", "Training", "Reports", "Titles", and "Other". The "Other" tab is selected. Inside the "Other" tab, there are two main sections: "Set Color" and "Access Code". The "Set Color" section has a "Color Palette" button and a "text field". The "Access Code" section has an "Install Date" field showing "11/7/2007", a "System Access" field with the value "42458", and a "License Key" field with the value "700-3969846132196". An "Apply" button is located at the bottom right of the dialog box.

Fields - Buttons	Description
Color Palette	Changes the text color
System Access	Code value determines the level of access
License Key	Unlocks the software for full rights
Apply Button	Saves the settings

Compact Data Base

When employees, courses and other items are deleted, they are only marked as deleted but remain physically in the database. The compact option will compress the database and physically remove any deleted items.

To use this feature, click on the menu item **File** and from the pull down click on **Accessories – Compact**.

The compact option should be used every few months to clean up the database and **not** each time you delete an item.

Add Field to Data Base

When we modify elements of the program, the database tables/fields may be affected. The add field option will add the necessary information to the database.

To use this feature, click on the menu item **File** and from the pull down click on **Accessories – Add Field**.

You do not need to run this option unless instructed to by us.