Version

8.5

PENTAGON 2000 SOFTWARE

Employee Training Module

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TITLE:	Employee Training Module		
PART:	General System		
MODULE:	Employee Training		
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	**REVISION:**	0
APPROVED BY:	Vice President, Operations, Pentagon 2000	**EFFECTIVE DATE:**	06/13/2012

Purpose

The Employee Training module will enable your organization to keep track of training that has been performed while automatically updating employee files with the skill classifications obtained by participation in those courses. This module allows you to assign the frequency that training must be performed.

Overview

This procedure outlines the steps for creating courses, scheduling training classes, and signing off training classes.

Required Modules

- Employee Training

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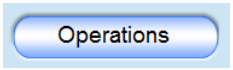
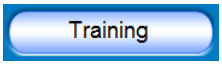
Procedure

1. **Opening the Employee Training Module:**

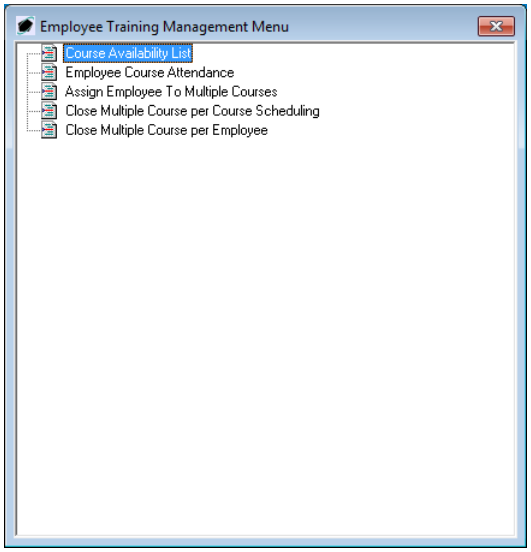
   a. From the main menu screen, left-click the **Operations** button.



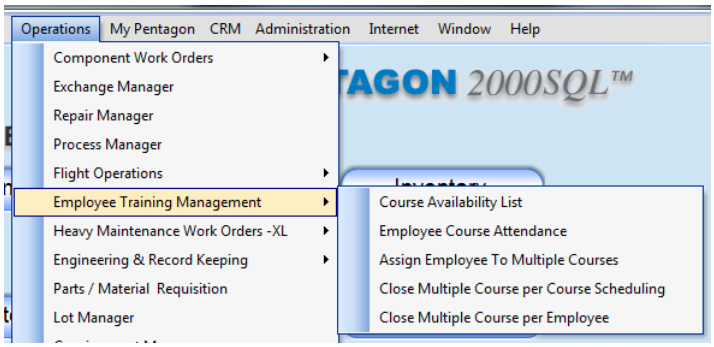
   b. The **Operations Menu** window will open. Left-click the **Training** button



   c. The **Employee Training Management Menu** window will appear.



NOTE: *The Employee Training module may also be accessed from the toolbar. Left-click the* ***Operations*** *item from the toolbar and go to* ***Employee Training Management****. The list of functions will appear.*

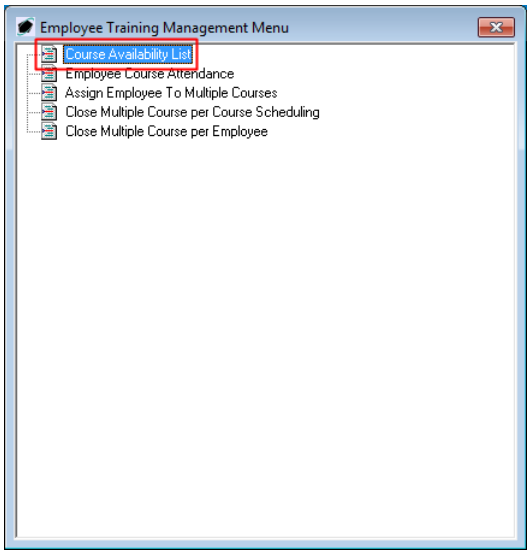


2. Creating a Course

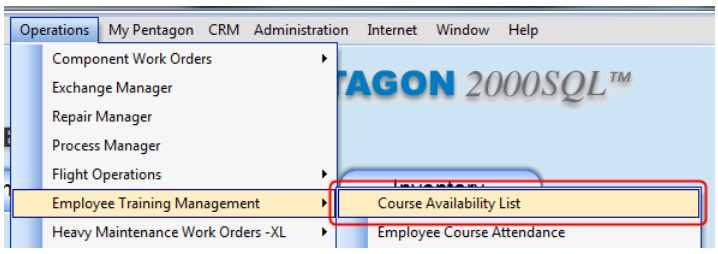
A course is defined as a set of instruction that is provided in order to learn a skill or obtain information regarding a specific topic and generally includes an assessment to demonstrate proficiency in that skill or knowledge of the topic.

a. Open the **New Course** window

i. From the Employee Training Management Menu, double-click the "Course Availability List" option.

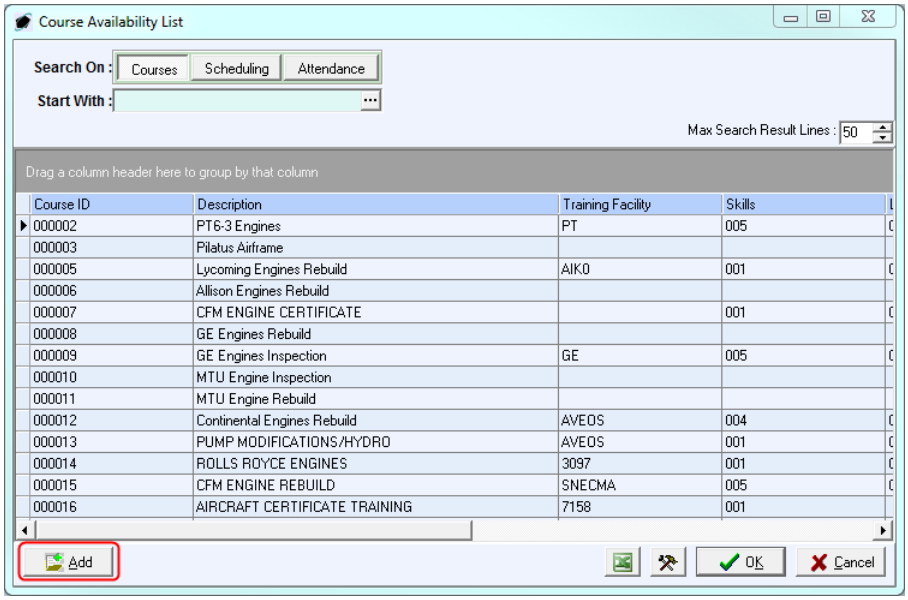


NOTE: *This option may also be accessed from the toolbar. Left-click the* ***Operations*** *item from the toolbar, go to* ***Employee Training Management****, and left-click* ***Course Availability List****.*

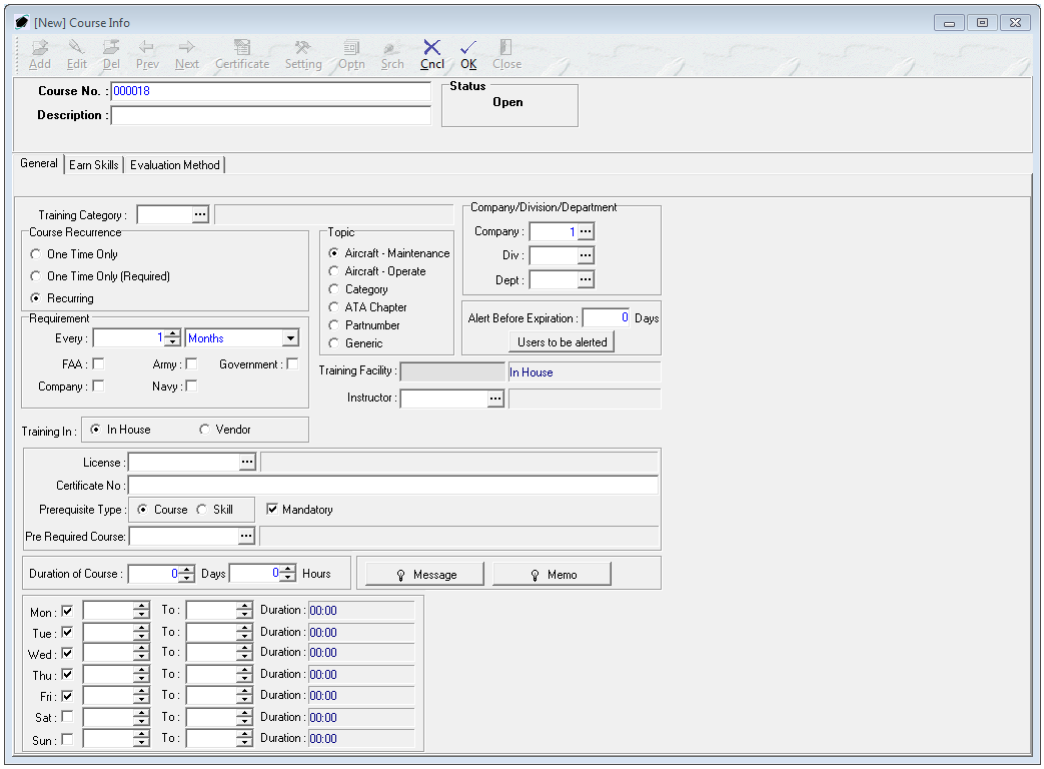


ii. The **Course Availability List** search window will appear. Left-click the **Add** button.

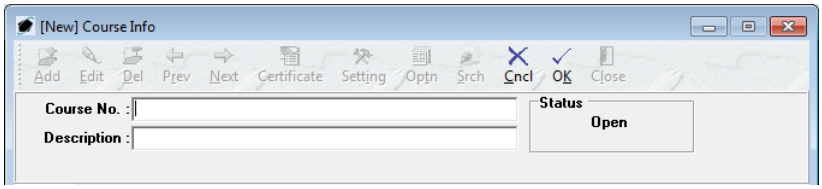
> ***NOTE:*** *The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.*



iii. The **[New] Course Info** window will appear.



b. **Header**



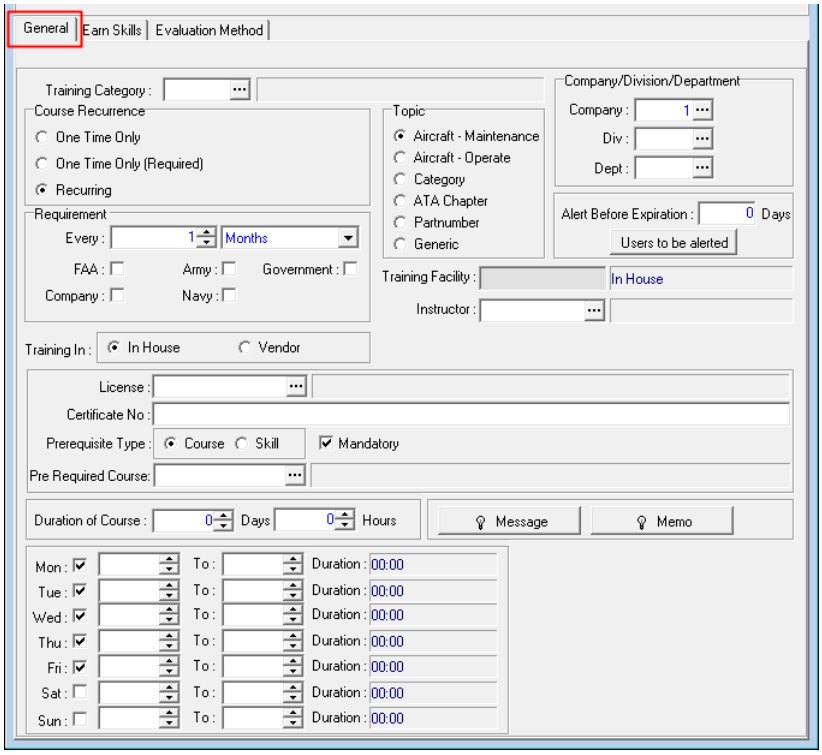
i. **Course No** - Identify the alphanumeric designation for the course. [20-character limit]

> ***NOTE:*** *The system will automatically assign a course number based upon the counter within the system. As of Build 8.5.54.82, this counter is a six-digit number beginning with "000001" and cannot be reset or adjusted. However, the course number may be changed to any alphanumeric string of characters (including symbols).*

ii. **Description** - Identify the simple description of the course. [50-character limit]

iii. **Status** - displays the status of the course.

c. **General** Tab



i. **Training Category** - Identify the training category for the course. This field is mandatory.

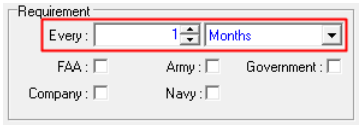
> ***NOTE:*** *To complete the* ***Training Category*** *field, the appropriate category must be listed in the* ***Training List****. To access this table, left-click* ***Administration*** *from the tool bar, go to* ***Pentagon Users & Groups****, and left-click* ***Employee Training Category.***

1. Left-click the ellipses ··· in the **Training Category** field.
2. The **Training List** search window will appear.
3. Select the appropriate category (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

ii. **Course Recurrence** Group Box - select the appropriate selection by left-clicking the radio button to the left of the appropriate label:

1. **One Time Only** - the course must only be performed once.
2. **One Time Only (Required)** - the course must only be performed once; however, no employee may log time in the Electronic Time Sheet module unless all courses marked One Time Only (Required) have been accomplished.

3. **Recurring** - the course must be performed on a recurring basis.

> ***NOTE:*** *If the **Recurring** option is selected, the interval fields within the **Requirement** group box will become active.*
>
> 
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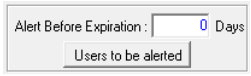
>
> *In addition, another group box will appear that allows an alert to be sent to specified users when using the Scheduling Server module.*
>
> 
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>
> *Instructions on the use of the Scheduling Server module may be found in the procedure "Scheduling Server Module" within the General System section of this manual.*

iii. **Requirement** Group Box

1. If the course is identified as **Recurring**, identify the interval that the training must be performed.

> ***NOTE:*** *If the course is identified as **One Time Only**, the interval fields will be inactive.*

   a. Left-click the field containing the drop down arrow. Left-click the unit of time in which the interval is measured.

   b. Left-click the cursor into the field to the right of the **Every** label. Enter the numeric value associated with the recurring interval. The spinner arrows may also be used to adjust the number in whole number increments.

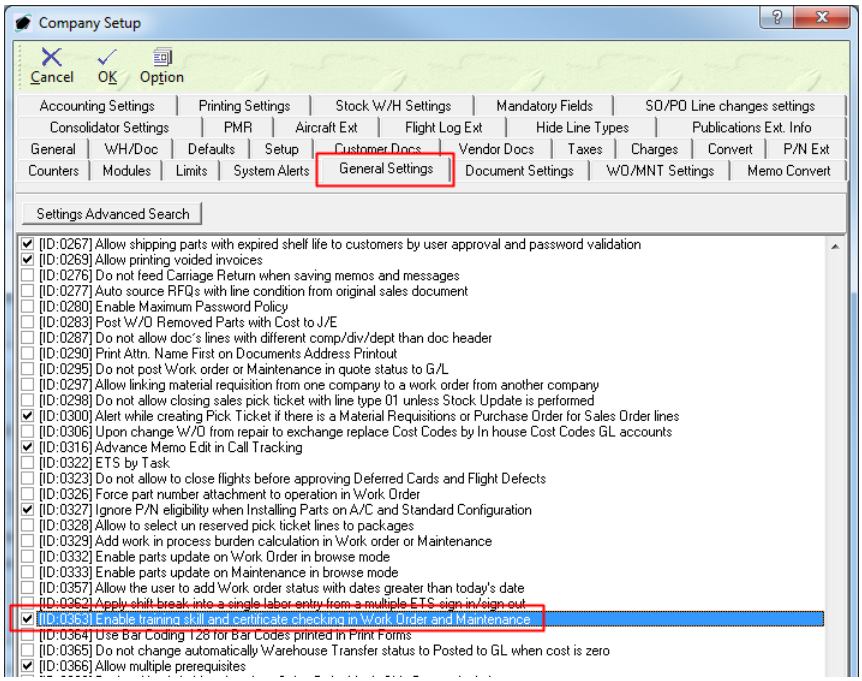
2. Identify if the course is required by one of the listed organizations. Left-click the check box to the right of the **FAA**, **Army**, **Government**, **Company**, and/or **Navy** to mark the check box as "checked".

> ***NOTE:*** *These check boxes are for reference and custom reporting purposes only.*

iv. **Topic** Group Box

> ***NOTE:*** *The topic of a course may be configured to further restrict the employees who receive the training to working on specific items or aircraft models.*
>
> *In order to ensure that each employee working on a component work order or maintenance work order has the appropriate skill training applicable to specific aircraft models, ATA chapter, and/or part number,*

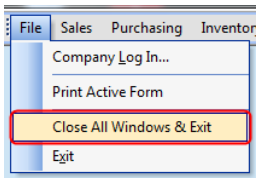
*Left-click **Administration** from the toolbar, go to **System Setup**, left-click **System General Defaults**. The **Company Setup** window will appear, left-click the **General Settings** tab. Find the setting identified by **[ID:0363]** and labeled "Enable training skill and certificate checking in Work Order and Maintenance".*



*Left-click the check box to the left of **[ID:0363]** to mark it as "checked". Left-click the **OK** button at the top of the **Company Setup** window.*

*A **Confirm** window will appear. Left-click **Yes**.*

*The user who modified the settings must log out of the system. Left-click **File** from the toolbar and left-click **Close All Windows & Exit**.*



If another user was logged into the system during the activation, that user must also log out before the settings will take effect.

1. **Aircraft - Maintenance** - If the training provides and/or confirms skills applicable to performing maintenance on specific aircraft models, left-click the radio button to the left of the **Aircraft - Maintenance** label.

> ***NOTE:*** *Once the course record is saved, a tab labeled **Aircraft Maintenance** will appear. The aircraft model(s) for which the training is applicable will need to be added. Instructions for completing this tab may be found later in this procedure.*

2. **Aircraft - Operate** - If the training provides and/or confirms skills applicable to operating specific aircraft models, left-click the radio button to the left of the **Aircraft - Operate** label.

> ***NOTE:*** *Once the course record is saved, a tab labeled **Aircraft Operate** will appear. The aircraft model(s) for which the training is applicable will need to be added. Instructions for completing this tab may be found later in this procedure.*

3. **Category** - If the training provides and/or confirms skills applicable to performing maintenance on a specific category of part master records, left-click the radio button to the left of the **Category** label.

> ***NOTE:*** *Once the course record is saved, a tab labeled **Category** will appear. The part number categories for which the training is applicable will need to be added. Instructions for completing this tab may be found later in this procedure.*

4. **ATA Chapter** - If the training provides and/or confirms skills applicable to performing component maintenance on all part master records that are assigned to a specific ATA chapter and all aircraft maintenance that would be classified within that ATA chapter, left-click the radio button to the left of the **ATA Chapter** label.

> ***NOTE:*** *Once the course record is saved, a tab labeled **ATA Chapter** will appear. The ATA chapter(s) for which the training is applicable will need to be added. Instructions for completing this tab may be found later in this procedure.*

5. **Partnumber** - If the training provides and/or confirms skills applicable only to specific part master records, left-click the radio button to the left of the **Partnumber** label.

> ***NOTE:*** *Once the course record is saved, a tab labeled **Partnumber** will appear. The part number(s) for which the training is applicable will need to be added. Instructions for completing this tab may be found later in this procedure.*

6. **Generic** - If the training provides and/or confirms skills that are not directly related to aircraft models or part numbers (i.e. Health and Safety, Human Resources), left-click the radio button to the left of the **Generic** label.

> ***NOTE:*** *Once the course record is saved, a field labeled **Topic** will appear. The topic for which the training is applicable will need to be identified. Instructions for completing this field may be found later in this procedure.*

v. **Company/Division/Department** Group Box - Identify the lowest level that includes all employees for which the course is applicable.

1. **Company** - Identify for which company the training is applicable.
   a. Left-click the **Company** field.
   b. The **Company List** search window will appear.
   c. Select the appropriate company (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
2. **Div** - If the training is applicable only to a single division, identify for which division the training is applicable.
   a. Left-click the **Div** field.
   b. The **Division List For Company [X]** search window will appear.
   c. Select the appropriate division (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

> ***NOTE:*** *If the training is applicable to more than one division, leave the **Div** field blank.*

3. Dept - If the training is applicable only to a single department, identify for which department the training is applicable.
   a. Left-click the **Dept** field.
   b. The **Department List For Company [X] - Division [Y]** search window will appear.
   c. Select the appropriate department (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

> ***NOTE:*** *If the training is applicable to more than one department, leave the **Dept** field blank.*

vi. Alert Setup

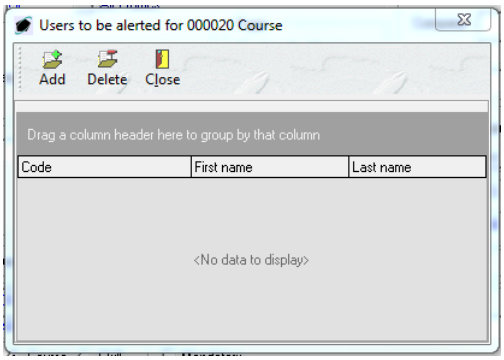
> ***NOTE:*** *Alerts will not work unless the Scheduling Server module is being used and a specific task is setup. Instructions on the use of the Scheduling Server module may be found in the procedure "Scheduling Server Module" within the General System section of this manual.*

1. If the **Recurring** option is selected in the **Course Recurrence** group box, identify when an alert should be sent out. The system will send an internal email to selected individuals the identified number of days before each attendee's skill (which was earned by attending the course) is to expire.
   a. Left-click the cursor into the **Alert Before Expiration** field.
   b. Type the number of days prior to the skill expiration that selected individuals should be notified.

2. Identify the users to be alerted.

   a. Left-click the **Users to be alerted** button.

   b. The **Users to be alerted for X Course** window will appear.



   c. Left-click the **Add** button.

   d. The **Users List** search window will appear.

   e. Select the appropriate user(s) (left-click the line(s) within the search screen and left-click **OK**).

   f. Left-click the **Close** button from the **Users to be alerted for X Course** toolbar to close the window.

vii. **Training In** Group Box - Identify whether the course is regularly performed in house or by a vendor.

> ***NOTE:*** *This field is a default setting and may be changed for individual classes if necessary. Selection should reflect the most likely option.*

1. If the course is administered by an employee within your organization, left-click the radio button to the left of the **In House** label.

> ***NOTE:*** *If the **In House** option is selected, the **Training Facility** field will become inactive and "In House" will be displayed.*
>
>
>

2. If the course is administered by a vendor, left-click the radio button to the left of the **Vendor** label.

> ***NOTE:*** *If the **Vendor** option is selected, the **Training Facility** field will become active and an ellipsis ··· will appear in the field.*
>
>
>

viii. **Training Facility** - If the course is normally administered by a vendor, identify the vendor that will normally administer the course.

> ***NOTE:*** *This field is a default setting and may be changed for individual classes if necessary. Selection should reflect the most likely option.*
>
> ***NOTE:*** *To complete the **Training Facility** field for the course, the vendor must be loaded in the system as a vendor. Steps for loading a vendor may be found in the procedure "Creating a Vendor" within the Purchasing section of this manual.*

1. Left-click the **Training Facility** field.
2. The **Vendors List** search window will appear.
3. Select the appropriate vendor (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

ix. **Instructor** - Identify the individual who will most likely be administering the course.

> ***NOTE:*** *This field is a default setting and may be changed for individual classes if necessary. Selection should reflect the most likely option.*

1. If the **In House** option was selected in the **Training In** group box:

   > ***NOTE:*** *To complete the **Instructor** field for a course administered by an employee, the individual administering the course must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.*
   >
   > *Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.*

   a. Left-click the **Instructor** field.
   b. The **Users List** search window will appear.
   c. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

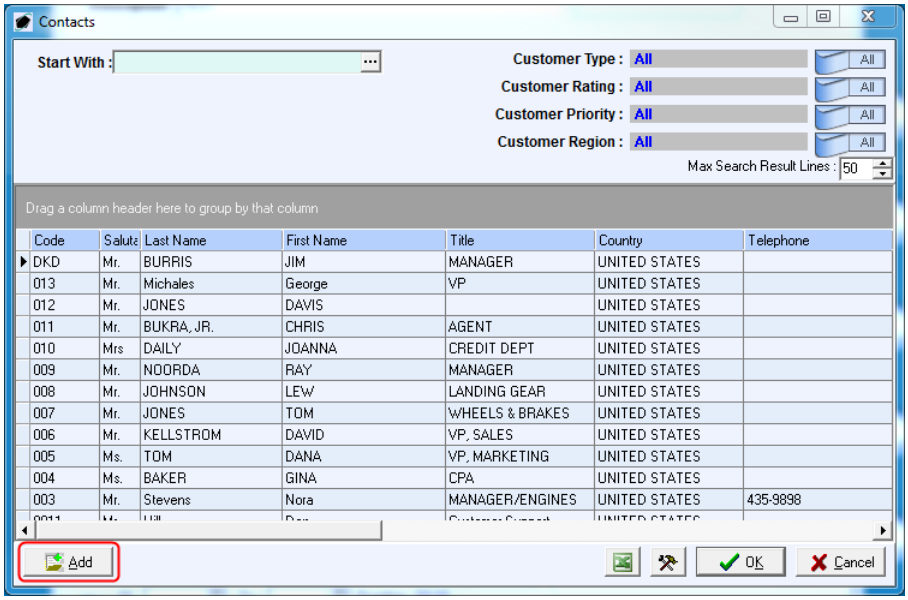
2. If the **Vendor** option was selected in the **Training In** group box:

   a. Left-click the **Instructor** field.
   b. The **Contacts** search window will appear.

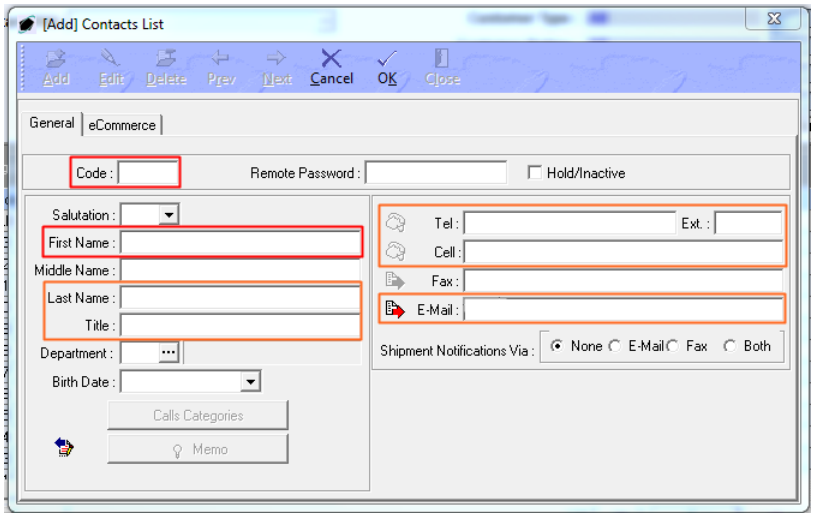
c. Select the appropriate contact (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: *If the individual administering the course is not loaded as a contact for the vendor, that individual's information can be input on the fly.*

*When the **Contacts** search window appears, left-click the **Add** button.*



*The **[Add] Contacts List** window will appear.*



*Complete the recommended fields (only **Code** and **First Name** are mandatory) and left-click the **OK** button from the **[Add] Contacts List** toolbar.*

x. To activate the appropriate topic tab or the **Topic** field, left-click the **OK** button from the **[New] Course Info** toolbar, then left-click the **Edit** button from the **Course Info** toolbar.

xi. **Topic** - if the **Generic** option was selected in the **Topic** group box, the **Topic** field will be active and an ellipsis will appear in the field.

> ***NOTE:*** *To complete the **Topic** field, the appropriate topic must be listed in the **Course Topics List**. To access this table, left-click **Administration** from the tool bar, go to **General Tables List By Code**, and left-click **Course Topics**.*

1. Left-click the **Topic** field.
2. The **Course Topics List** search window will appear.
3. Select the appropriate topic (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

xii. **License** - Identify the license that is earned by the completion of the course. (optional)

> ***NOTE:*** *This field is a default setting and may be changed for individual classes if necessary. Selection should reflect the most likely option.*
>
> ***NOTE:*** *To complete the **License** field, the appropriate license must be listed in the **License Code List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **License Code**.*

1. Left-click the **License** field.
2. The **License Code List** search window will appear.
3. Select the appropriate license (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

xiii. **Certificate No** - Identify the certificate number that is earned by the completion of the course. (optional).

> ***NOTE:*** *This field is a default setting and may be changed for individual classes if necessary. Input may reflect the certificate number format rather than an actual certificate number.*

1. Left-click the cursor into the **Certificate No** field.
2. Type the certificate number or certificate number format.

xiv. **Prerequisite Type**

1. If another course must be passed prior to attending the course, left-click the radio button to the left of the **Course** label.

> ***NOTE:*** *If the **Course** option is selected in the **Prerequisite Type** group box, the **Pre-Required Course** field will be available.*

2. If skill(s) must be earned prior to attending the course, left-click the radio button to the left of the **Skill** label.

> ***NOTE:*** *If the **Skill** option is selected in the **Prerequisite Type** group box, the **Pre-Required Course** field will be hidden and a **Pre-Required Skills** tab will appear. Instructions for completing this tab may be found later in this procedure.*

xv. **Mandatory** Check Box

1. If the prerequisite course or skill(s) is mandatory, ensure that the check box to the left of the **Mandatory** label is marked as "checked".
2. If the prerequisite course or skill(s) is not mandatory (recommended only), ensure that the check box to the left of the **Mandatory** label is marked as "unchecked".

xvi. **Pre Required Course** - If the course option is selected in the Prerequisite Type group box, and a prerequisite course truly exists, identify the prerequisite course.

1. Left-click the **Pre Required Course** field.
2. The **Course Availability List** search window will appear.
3. Select the appropriate course (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

xvii. **Duration of Course** Group Box - Identify the length of time that it will take to accomplish the course in any combination of days and hours.

> ***NOTE:*** *Time should be input considering the days and hours that training is going to occur. The days and hours available for performing this course will be identified in the next step of this procedure.*
>
> ***EXAMPLE:*** *If it has been identified that training may occur eight (8) hours per day, Monday through Friday and the course takes three (3) days to complete, then either 3 days OR 24 hours should be entered into the Duration of Course group box.*
>
> ***NOTE:*** *Best practice would be to enter the number of hours required for the course.*

1. Left-click the cursor into the field to the left of the **Days** label. Enter the number of days associated with completing the course. The spinner arrows may also be used to adjust the number in whole number increments.
2. Left-click the cursor into the field to the left of the **Hours** label. Enter the number of hours associated with completing the course. The spinner arrows may also be used to adjust the number in whole number increments.

xviii. Identify the days and times for when this course will be performed.

1. If training is allowed to occur on a particular day, ensure the check box to the right of the day of the week is marked as "checked".

2. If the check box to the right of a day of the week is marked as "checked", identify the start time and the end time of training.

> ***NOTE:*** *The calculated duration assumes that training begins at the start time and does not end until the end time. There is no allowance for breaks or lunch. Adjust accordingly.*

xix. **Message** and **Memo** fields

1. Left-click the **Message** or **Memo** button.
2. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.
3. Type the message or memo.
4. Left-click the **OK** button in the **Memo Editor** toolbar to save the message.
5. When the **Message** or **Memo** field is not blank, the light bulb on the appropriate button will be highlighted in yellow.

d. **Pre-Required Skills** Tab

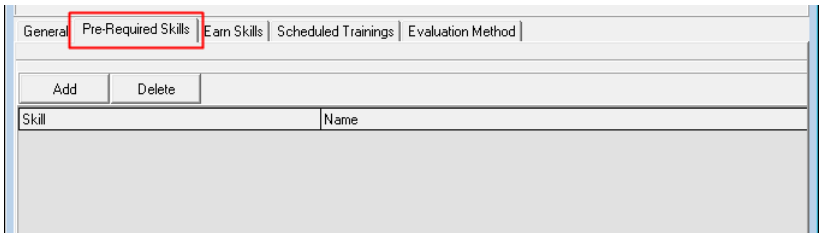
If the Skill option is selected in the Prerequisite Type group box, then the Pre-Required Skills tab will appear.

Identify the skills that an employee must have previously earned prior to attending the course.

NOTE: *To complete the **Pre-Required Skills** tab, the appropriate skill(s) must be listed in the **Skills List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Employee Skills.***

NOTE: *Earned skills will appear on the **Skills** tab of the employee's user file. To access this tab, left-click **Administration** from the tool bar, Go to **Pentagon Users & Groups**, and left-click **User List**. The **User List** search window will appear. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen). The **Employee/User Information** window will appear. Left -click the **Skills** tab.*

NOTE: *If an employee has not earned all of the skills listed on the **Pre-Required Skills** tab, that employee will not be allowed to attend the course.*



i. Add skills

1. Left-click the **Add** button at the top of the **Pre-Required Skills** tab.
2. The **Skills List** search window will appear.
3. Select the appropriate skill(s) (left-click the line(s) within the search screen and left-click **OK**).

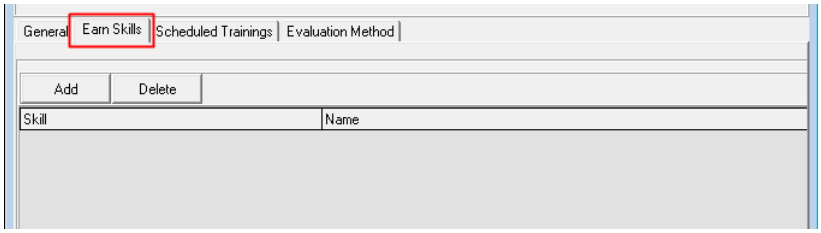
ii. Delete skills

1. Left-click the skill on the **Pre-Required Skills** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Pre-Required Skills** tab.

e. **Earn Skills** Tab

Identify the skills that are earned as a result of the course. When the course is completed, the skills listed on the Earn Skills tab will be added to the Skills tab of the User file along with a Good Until date (if applicable).

NOTE: *To complete the **Earn Skills** tab, the appropriate skill(s) must be listed in the **Skills List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Employee Skills.***



i. Add skills

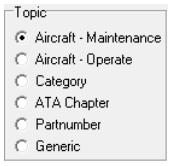
1. Left-click the **Add** button at the top of the **Earn Skills** tab.
2. The **Skills List** search window will appear.
3. Select the appropriate skill(s) (left-click the line(s) within the search screen and left-click **OK**).

ii. Delete skills

1. Left-click the skill on the **Earn Skills** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Earn Skills** tab.

f. **Aircraft Maintenance** Tab

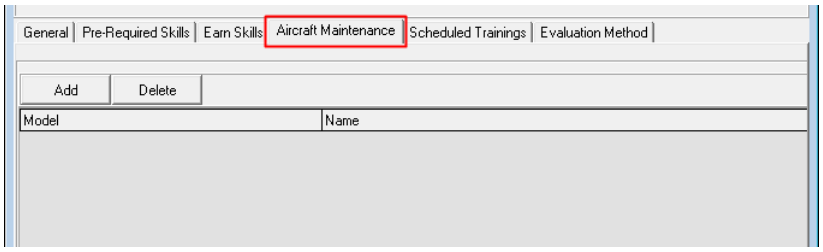
If the **Aircraft - Maintenance** option is selected in the **Topic** group box, the **Aircraft Maintenance** tab will appear.



Identify the models of aircraft for which this course applies.

NOTE: *If training skill and certificate checking is enabled (**[ID:0363]** on the **General Settings** tab of the **Company Setup**) then an additional administrative control for labor tracking within maintenance work orders is available based upon aircraft model.*

*If courses exist with the **Aircraft - Maintenance** option selected in the **Topic** group box and a specific model identified on the **Aircraft Maintenance** tab, then only employees who have attended all courses applicable to that specific model will be able to add labor to maintenance work orders associated with that specific model of aircraft.*



i. Add models

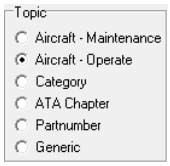
1. Left-click the **Add** button at the top of the **Aircraft Maintenance** tab.
2. The **Aircraft Model List** search window will appear.
3. Select the appropriate model(s) (left-click the line(s) within the search screen and left-click **OK**).

ii. Delete models

1. Left-click the model on the **Aircraft Maintenance** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Aircraft Maintenance** tab.

g. **Aircraft Operate** Tab

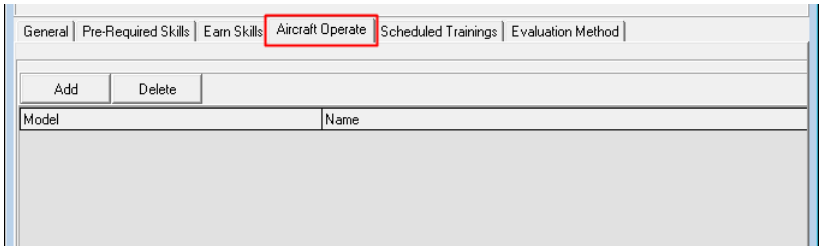
If the **Aircraft - Operate** option is selected in the **Topic** group box, the **Aircraft Operate** tab will appear.



Identify the models of aircraft for which this course applies.

NOTE: *If training skill and certificate checking is enabled (**[ID:0363]** on the **General Settings** tab of the **Company Setup**) then an additional administrative control crew within flight operations is available based upon aircraft model.*

*If courses exist with the **Aircraft - Operate** option selected in the **Topic** group box and a specific model identified on the **Aircraft Operate** tab, then only employees who have attended all courses applicable to that specific model will be able to be added as crew on flight logs associated with that specific model of aircraft.*



i. Add models

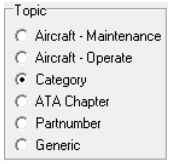
1. Left-click the **Add** button at the top of the **Aircraft Operate** tab.
2. The **Aircraft Model List** search window will appear.
3. Select the appropriate model(s) (left-click the line(s) within the search screen and left-click **OK**).

ii. Delete Models

1. Left-click the model on the **Aircraft Operate** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Aircraft Operate** tab.

h. **Category** Tab

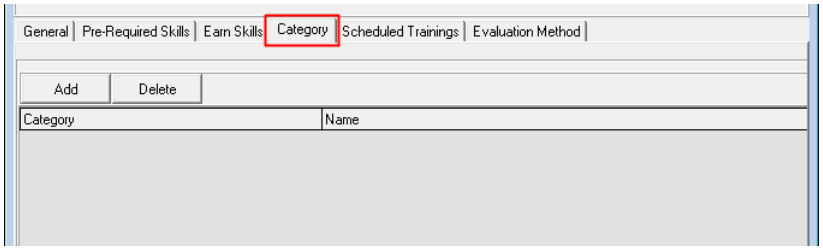
If the **Category** option is selected in the **Topic** group box, the **Category** tab will appear.



Identify the inventory category/categories for which this course applies.

*NOTE: If training skill and certificate checking is enabled (**[ID:0363]** on the **General Settings** tab of the **Company Setup**) then an additional administrative control for labor tracking within component work orders is available based upon the category assigned to part master records.*

*If courses exist with the **Category** option selected in the **Topic** group box and a specific category identified on the **Category** tab, then only employees who have attended all courses applicable to that specific category will be able to add labor to component work orders associated with part numbers that are associated with that specific category.*



i. Add categories

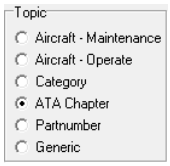
1. Left-click the **Add** button at the top of the **Category** tab.
2. The **Inventory Category List** search window will appear.
3. Select the appropriate category/categories (left-click the line(s) within the search screen and left-click **OK**).

ii. Delete categories

1. Left-click the category on the **Category** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Category** tab.

i. **ATA Chapter** Tab

If the **ATA Chapter** option is selected in the **Topic** group box, the **ATA Chapter** tab will appear.

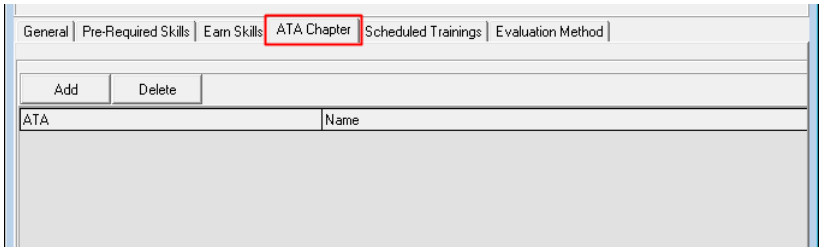


Identify the ATA chapter(s) for which this course applies.

NOTE: *If training skill and certificate checking is enabled (**[ID:0363]** on the **General Settings** tab of the **Company Setup**) then an additional administrative control for labor tracking within both maintenance and component work orders is available based upon ATA chapters.*

*For maintenance work orders: If courses exist with the **ATA Chapter** option selected in the **Topic** group box and a specific ATA chapter identified on the **ATA Chapter** tab, then employees who have attended all courses applicable to that specific ATA chapter will be able to add labor to maintenance work order cards associated with that specific ATA chapter.*

*For component work orders: If courses exist with the **ATA Chapter** option selected in the **Topic** group box and a specific ATA chapter identified on the **ATA Chapter** tab, then employees who have attended all courses applicable to that specific ATA chapter will be able to add labor to component work orders associated with part numbers that are associated with that specific ATA chapter.*



i. Add ATA chapters

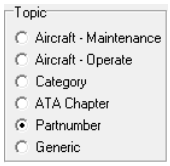
1. Left-click the **Add** button at the top of the **ATA Chapter** tab.
2. The **ATA List** search window will appear.
3. Select the appropriate ATA chapter(s) (left-click the line(s) within the search screen and left-click **OK**).

ii. Delete ATA chapters

1. Left-click the ATA chapter on the **ATA Chapter** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **ATA Chapter** tab.

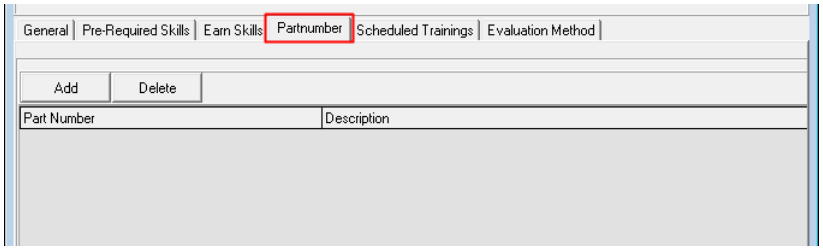
j. **Partnumber** Tab

If the **Partnumber** option is selected in the **Topic** group box, the **Partnumber** tab will appear.



Identify the part number(s) for which this course applies.

> ***NOTE:*** *If training skill and certificate checking is enabled (**[ID:0363]** on the **General Settings** tab of the **Company Setup**) then an additional administrative control for labor tracking within component work orders is available based upon part number.*
>
> *If courses exist with the **Partnumber** option selected in the **Topic** group box and a specific part number identified on the **Partnumber** tab, then employees who have attended all courses applicable to that specific part number will be able to add labor to component work orders associated with that specific part number.*



i. Add part numbers

1. Left-click the **Add** button at the top of the **Partnumber** tab.
2. The **Partnumber** search window will appear.
3. Select the appropriate part number(s) (left-click the line(s) within the search screen and left-click **OK**).

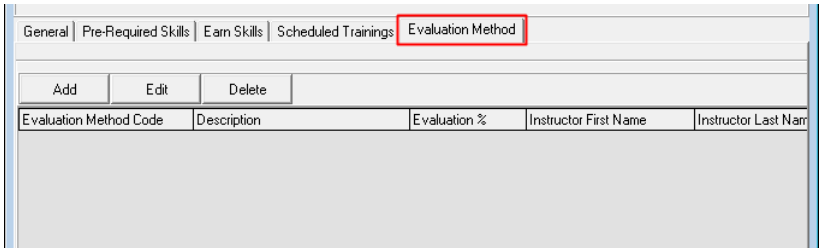
ii. Delete part numbers

1. Left-click the part number on the **Partnumbers** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Partnumbers** tab.

k. **Evaluation Method** Tab

Evaluation methods are the assessments used to demonstrate proficiency in the skill or knowledge of the topic for which the course exists.

> ***NOTE:*** *To add evaluation methods to the* ***Evaluation Method*** *tab, the appropriate evaluation methods must be listed in the* ***Evaluation Method List****. To access this table, left-click* ***Administration*** *from the tool bar, go to* ***Pentagon Users & Groups****, and left-click* ***Evaluation Method.***

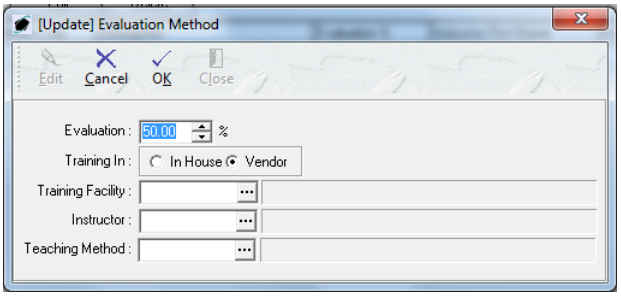


i. Add evaluation methods

1. Left-click the **Add** button at the top of the **Evaluation Method** tab.
2. The **Evaluation Method List** window will appear.
3. Select the appropriate evaluation method(s) (left-click the line(s) within the search screen and left-click **OK**).

ii. Update each evaluation method with information regarding the specific course

1. Left-click the evaluation method on the **Evaluation Method** tab that needs to be updated.
2. Left-click the **Edit** button at the top of the **Evaluation Method** tab.
3. The **[Update] Evaluation Method** window will appear.



a. **Evaluation** - Identify the percentage of the total course grade that is determined by this evaluation factor

b. **Training In** - Identify whether the evaluation is performed in house or by a vendor.

i. If the course is administered by an employee within your organization, left-click the radio button to the left of the **In House** label.

> ***NOTE:*** *If the **In House** option is selected, the **Training Facility** field will become inactive and "In House" will be displayed.*
>
>
>

ii. If the course is administered by a vendor, left-click the radio button to the left of the **Vendor** label.

> ***NOTE:*** *If the **Vendor** option is selected, the **Training Facility** field will become active and an ellipsis [...] will appear in the field.*
>
>
>

c. **Training Facility** - If the evaluation is administered by a vendor, identify the vendor that will administer the evaluation.

> ***NOTE:*** *To complete the **Training Facility** field for the evaluation, the vendor must be loaded in the system as a vendor. Steps for loading a vendor may be found in the procedure "Creating a Vendor" within the Purchasing section of this manual.*

i. Left-click the **Training Facility** field.

ii. The **Vendors List** search window will appear.

iii. Select the appropriate vendor (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

d. **Instructor** - Identify the individual who will be administering the course.

i. If the **In House** option was selected in the **Training In** group box:

> ***NOTE:*** *To complete the **Instructor** field for an evaluation administered by an employee, the individual administering the evaluation must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.*
>
> *Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.*

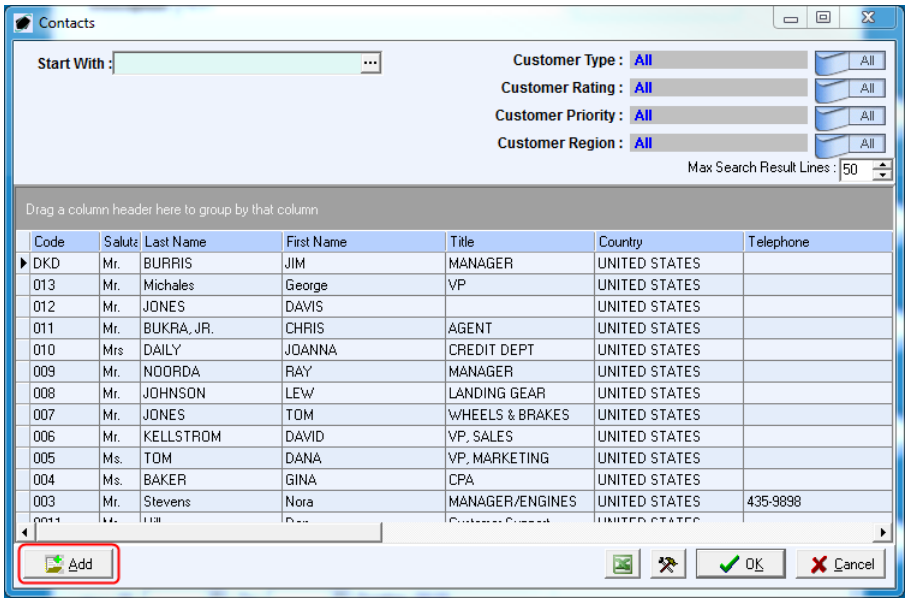
1. Left-click the **Instructor** field.
2. The **Users List** search window will appear.
3. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

ii. If the **Vendor** option was selected in the **Training In** group box:

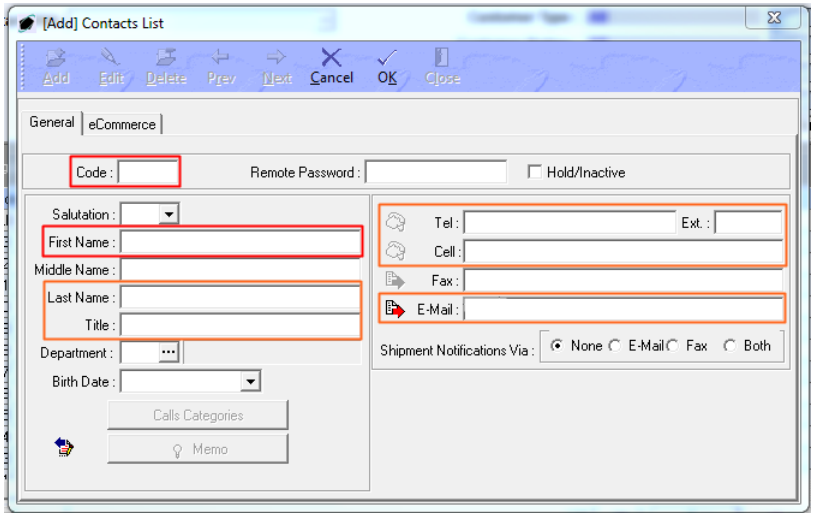
1. Left-click the **Instructor** field.
2. The **Contacts** search window will appear.
3. Select the appropriate contact (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: *If the individual administering the evaluation is not loaded as a contact for the vendor, that individual's information can be input on the fly.*

*When the **Contacts** search window appears, left-click the **Add** button.*



*The **[Add] Contacts List** window will appear.*



*Complete the recommended fields (only **Code** and **First Name** are mandatory) and left-click the **OK** button from the **[Add] Contacts List** toolbar.*

e. Teaching Method - For Build 8.5.54.84 and earlier, ignore this field.

iii. Delete evaluation methods

1. Left-click the evaluation method on the **Evaluation Method** tab that needs to be deleted.
2. Left-click the **Delete** button at the top of the **Evaluation Method** tab.

iv. Left-click the **OK** button on the **Course Info** window to exit **Edit** mode and save the course information.

3. **Training Classes**

A class is defined as a specific instance in which a course is conducted.

a. Open the Course Window

i. From the **Employee Training Management Menu**, double-click the "Course Availability List" option.

> ***NOTE:*** *This option may also be accessed from the toolbar. Left-click the* ***Operations*** *item from the toolbar, go to* ***Employee Training Management****, and left-click* ***Course Availability List****.*

ii. The **Course Availability List** search window will appear.

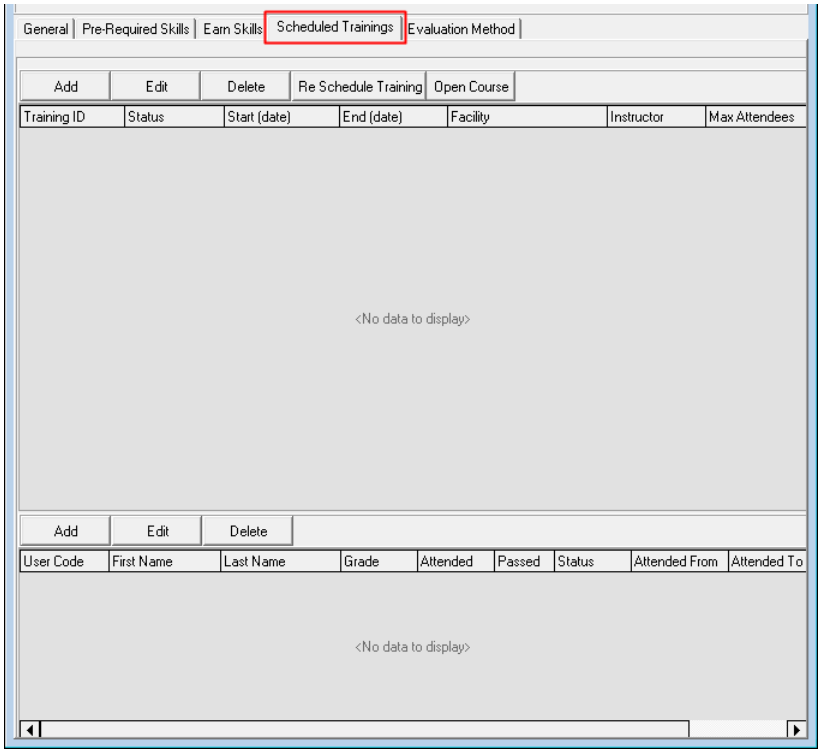
iii. Select the appropriate course (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

iv. The **Course Info** window will appear.

b. Creating a Training Class

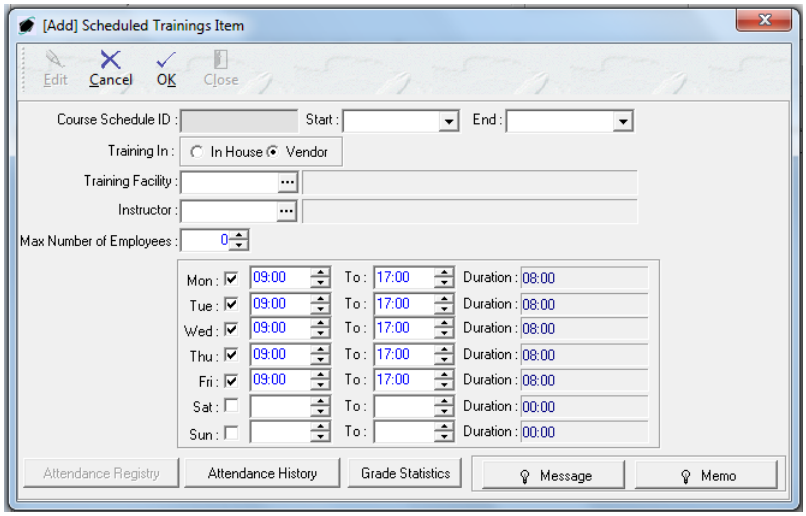
i. Left-click the **Edit** button on the **Course Info** toolbar to enter **Edit** mode.

ii. Left-click the **Scheduled Trainings** tab. Training classes for each course are managed on the **Scheduled Trainings** tab



iii. Left-click the Add button at the top of the **Scheduled Trainings** tab.

iv. The **[Add] Scheduled Trainings Item** window will appear.



1. **Course Schedule ID** - The system will automatically assign a course schedule ID number based upon the counter within the system.

> ***NOTE:*** *As of Build 8.5.54.82, this counter is a six-digit number beginning with "000001" and cannot be reset or adjusted.*

2. **Start** - Identify the date on which the class is to begin.
3. **End** - Identify the date on which the class is to end.

v. **Training In** Group Box - Identify whether the course will be performed in house or by a vendor.

> ***NOTE:*** *The default selection made on the **General** tab will be selected each time a new class is created. It may be changed if necessary.*

1. If the course will be administered by an employee within your organization, left-click the radio button to the left of the **In House** label.

> ***NOTE:*** *If the **In House** option is selected, the **Training Facility** field will become inactive and "In House" will be displayed.*
>
>
>

2. If the course will be administered by a vendor, left-click the radio button to the left of the **Vendor** label.

> ***NOTE:*** *If the **Vendor** option is selected, the **Training Facility** field will become active and an ellipsis ··· will appear in the field.*
>
>
>

vi. **Training Facility** - If the course will be administered by a vendor, identify the vendor that will administer the course.

> ***NOTE:*** *The default selection made on the **General** tab will be selected each time a new class is created. It may be changed if necessary.*
>
> ***NOTE:*** *To complete the **Training Facility** field for the course, the vendor must be loaded in the system as a vendor. Steps for loading a vendor may be found in the procedure "Creating a Vendor" within the Purchasing section of this manual.*

1. Left-click the **Training Facility** field.
2. The **Vendors List** search window will appear.
3. Select the appropriate vendor (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

vii. **Instructor** - Identify the individual who will be administering the course.

> ***NOTE:*** *The default selection made on the **General** tab will be selected each time a new class is created. It may be changed if necessary.*

1. If the **In House** option was selected in the **Training In** group box:

> ***NOTE:*** *To complete the **Instructor** field for a course administered by an employee, the individual administering the course must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.*
>
> *Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.*

   a. Left-click the **Instructor** field.

   b. The **Users List** search window will appear.

   c. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

2. If the **Vendor** option was selected in the **Training In** group box:

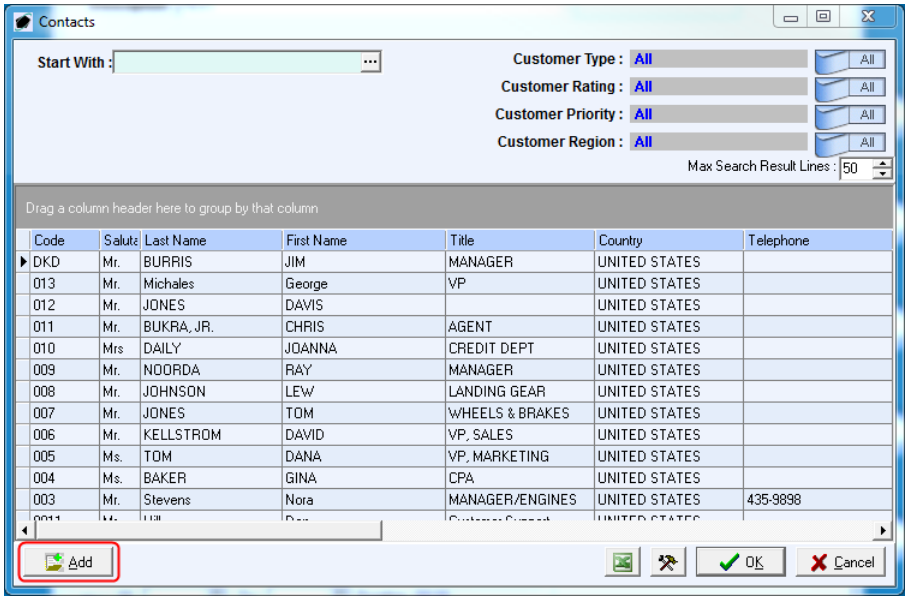
   a. Left-click the **Instructor** field.

   b. The **Contacts** search window will appear.

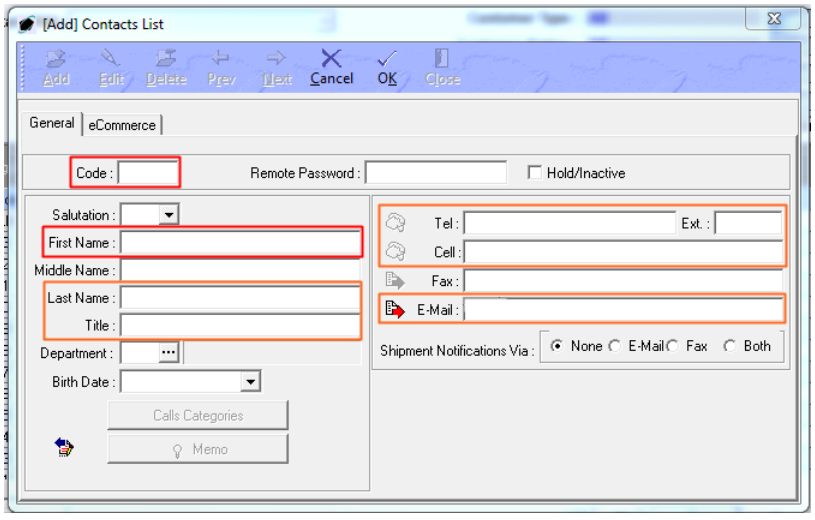
c. Select the appropriate contact (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

NOTE: *If the individual administering the course is not loaded as a contact for the vendor, that individual's information can be input on the fly.*

*When the **Contacts** search window appears, left-click the **Add** button.*



*The **[Add] Contacts List** window will appear.*



*Complete the recommended fields (only **Code** and **First Name** are mandatory) and left-click the **OK** button from the **[Add] Contacts List** toolbar.*

viii. **Max Number of Employees** - Identify the maximum number of employees that will be allowed to attend the class.

1. Left-click the cursor into the field to the right of the **Max Number of Employees** label.

2. Enter the number corresponding to the maximum number of employees allowed to attend this class. The spinner arrows may also be used to adjust the number in whole number increments.

ix. Identify the days and times for when this course will be performed.

> ***NOTE:*** *The default selection made on the* ***General*** *tab will be selected each time a new class is created. It may be changed if necessary.*

1. If training is allowed to occur on a particular day, ensure the check box to the right of the day of the week is marked as "checked".
2. If the check box to the right of a day of the week is marked as "checked", identify the start time and the end time of training.

> ***NOTE:*** *The calculated duration assumes that training begins at the start time and does not end until the end time. There is no allowance for breaks or lunch. Adjust accordingly.*

x. **Message** and **Memo** fields

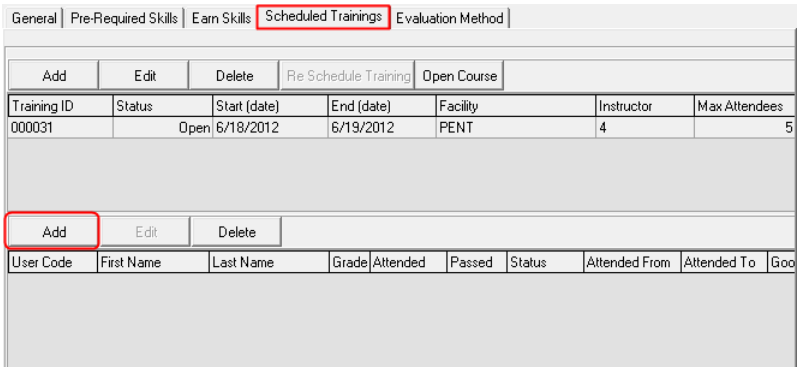
1. Left-click the **Message** or **Memo** button.
2. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.
3. Type the message or memo.
4. Left-click the **OK** button in the **Memo Editor** toolbar to save the message.
5. When the **Message** or **Memo** field is not blank, the light bulb on the appropriate button will be highlighted in yellow .

> ***NOTE:*** *The* ***Attendance Registry****,* ***Attendance History****, and* ***Grade Statistics*** *buttons are not used during the class creation process, but will be used later in this procedure.*

c. Add Employees to the Training Class

> ***NOTE:*** *To add employees to a training class, each employee must be listed in the* ***Users List****. To access this table, left-click* ***Administration*** *from the tool bar, go to* ***Pentagon Users and Groups****, and left-click* ***User List****.*
>
> *Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.*

i. Left-click the **Add** button at the bottom of the **Scheduled Trainings** tab.



ii. The **Users List** search window will appear.

iii. Select the appropriate user(s) (left-click the line(s) within the search screen and left-click **OK**).

> ***NOTE:*** *The system will not allow more than the maximum number of employees identified in the* ***Scheduled Trainings Item*** *window to be added to the class.*
>
> *NOTE: Employees added to the class will be displayed below the* ***Add*** *button at the bottom of the* ***Scheduled Trainings*** *tab.*

iv. Left-click the **OK** button on the **Course Info** window to exit **Edit** mode and save the course information.

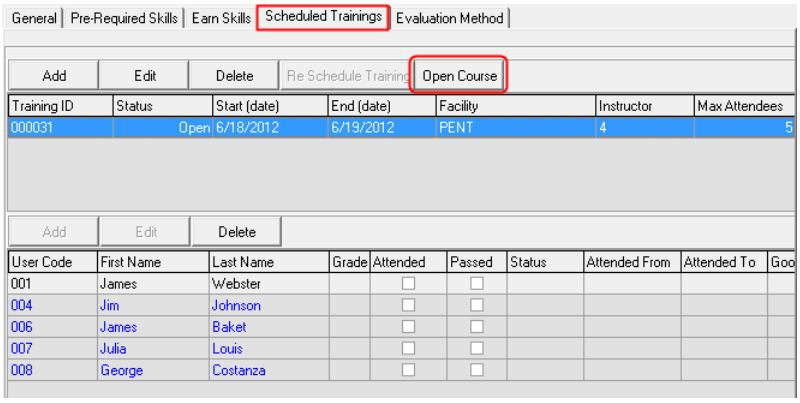
d. Open the Training Class

i. Left-click the **Edit** button on the **Course Info** toolbar to enter **Edit** mode.

ii. Left-click the **Scheduled Trainings** tab.

iii. Left-click on the class that needs to be opened.

iv. Left-click the **Open Course** button at the top of the **Scheduled Trainings** tab.



NOTE: *After the **Open Course** button is clicked, each of the **Employee Training** records (below the **Add** button at the bottom of the Scheduled Trainings tab) will be active and will display a status of "Pending".*

v. Left-click the **OK** button on the **Course Info** window to exit **Edit** mode and save the course information.

e. Mark Attendance for the Class (optional)

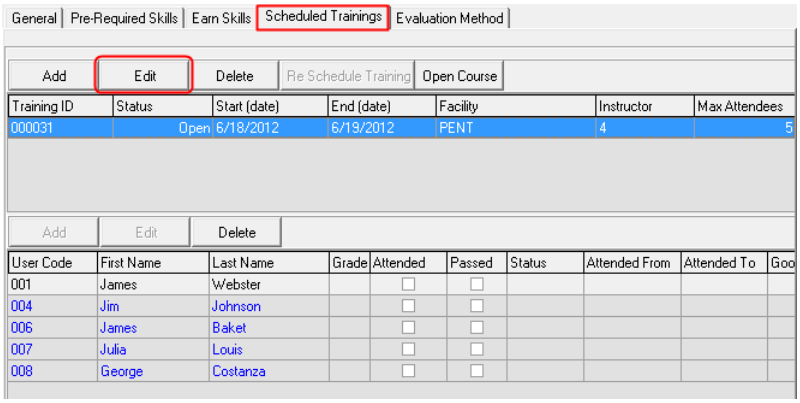
> ***NOTE:*** *This attendance does not link to the employee training record.*

i. Left-click the **Edit** button on the **Course Info** toolbar to enter **Edit** mode.

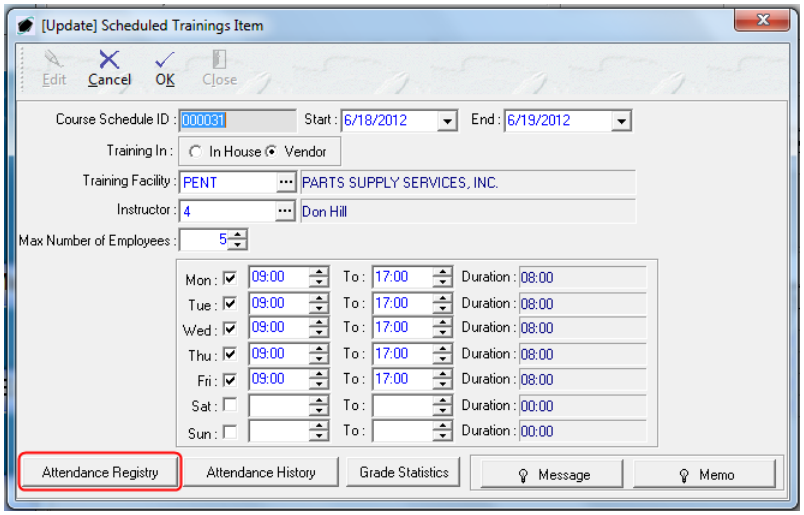
ii. Left-click the **Scheduled Trainings** tab.

iii. Left-click the line that corresponds to the class for which attendance needs to be marked.

iv. Left-click the **Edit** button at the top of the **Scheduled Trainings** tab.

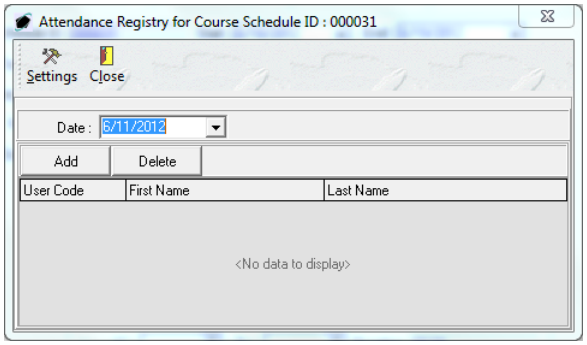


v. The **[Update] Scheduled Trainings Item** window will appear.



vi. Left-click the **Attendance Registry** button.

vii. The **Attendance Registry for Course Schedule ID : [X]** window will appear.



1. Left-click the **Date** field. The date widget will appear. Left-click the date for which attendance is to be marked.
2. Left-click the **Add** button, just below the **Date** field.
3. The User List search window listing only enrolled employees will appear.
4. Select the employee(s) who attended on that date (left-click the line(s) within the search screen and left-click **OK**).
5. Left-click the **Close** button on the **Attendance Registry for Course Schedule ID : [X]** toolbar.

viii. Left-click the **OK** button on the **[Updated] Scheduled Trainings Item** toolbar.

ix. Left-click the **Close** button on the **Scheduled Trainings Item** toolbar.

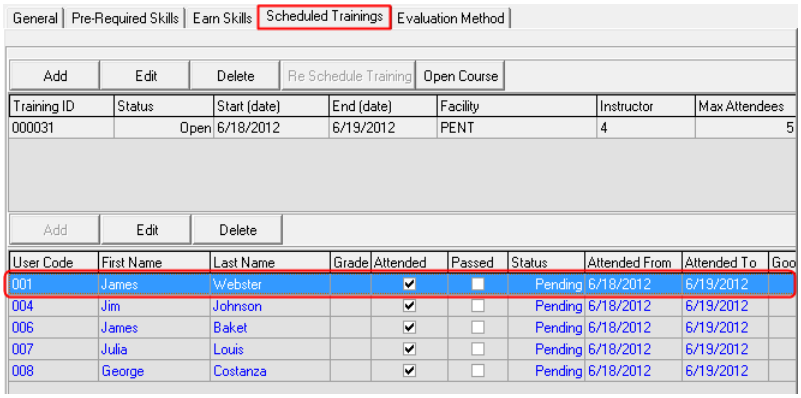
f. Completing the Employee Training Record.

i. Left-click the **Edit** button on the **Course Info** toolbar to enter **Edit** mode.

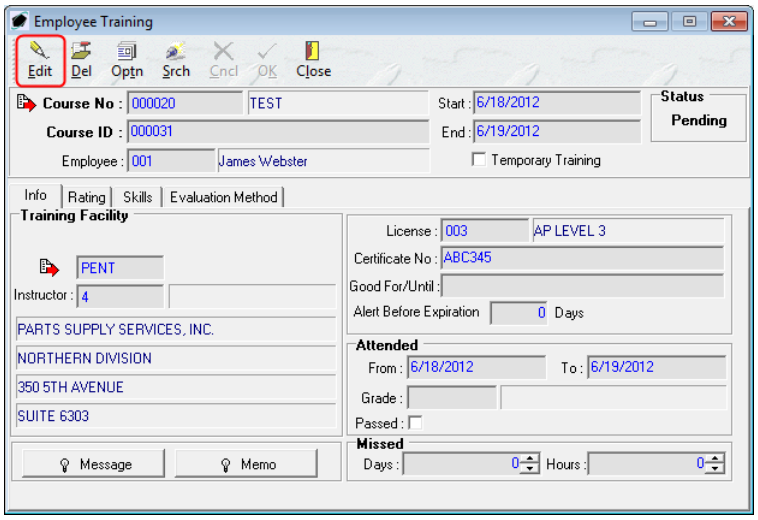
ii. Left-click the **Scheduled Trainings** tab.

iii. Left-click the line that corresponds to the class that the employee attended.

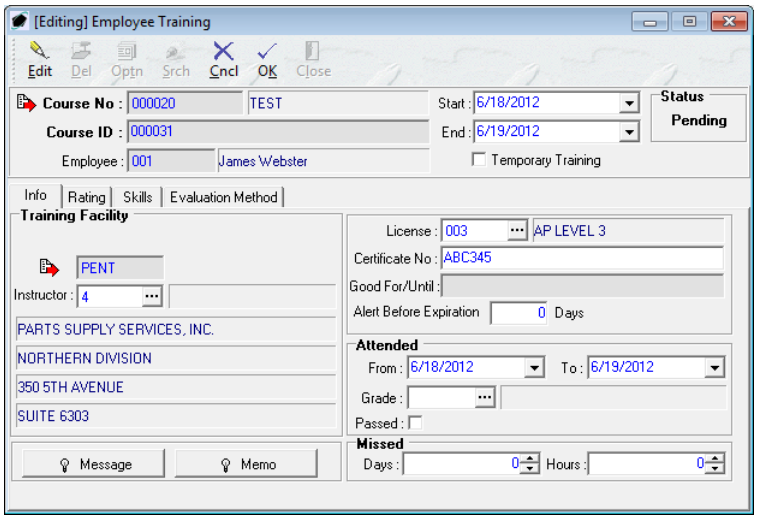
iv. Double-click the line that corresponds to the employee training record that is to be completed.



v. The **Employee Training** window will appear



vi. Left-click the **Edit** button on the **Employee Training** toolbar. The **Employee Training** window will enter edit mode and the title bar will read **[Editing] Employee Training**.



NOTE: Most of the information within the **Employee Training** window will be completed with values from the course or class.

1. **Header**

   a. **Course No** - identifies the number that corresponds to the course that the employee has attended (copied from the **Course Info** header).

   b. **Course ID** - identifies the number that corresponds to the specific training class that the employee has attended (copied from the **Scheduled Trainings Item** window).

   c. **Employee** - identifies the employee for which the training record is applicable.

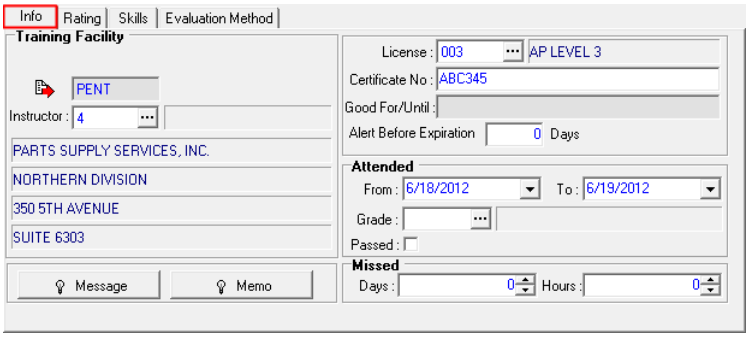
   d. **Start** - identifies the date on which the training class began (copied from the **Scheduled Training Items** window).

   e. **End** - identifies the date on which the training class ended (copied from the **Scheduled Training Items** window).

   f. **Temporary Training** checkbox - when marked as "checked", this field identifies that the skills earned or demonstrated during the training course will not be valid indefinitely but will expire at some point

   NOTE: *Applicable only when the **Course** is identified as "One Time Only" on the **General** tab. When the **Temporary Training** check box is marked as "checked", the employee training record cannot be completed without completing the **Good For/Until** field on the **Info** tab.*

2. **Info** Tab



a. **Training Facility** group box - Identifies whether the class was conducted in house or by a vendor. If the training class was conducted by a vendor, the vendor is identified. Also identifies the instructor (copied from the **Scheduled Trainings Item** window). The **Instructor** field may be modified if necessary.

b. **License** - Identifies the license that is earned by the completion of the course (copied from the **General** tab of **Course Info** window,). This field may be modified if necessary. (optional)

c. **Certificate No** - Identifies the certificate number that is earned by the completion of the course (copied from the **General** tab of **Course Info** window,). This field may be modified if necessary. (optional)

d. **Good For/Until** - Identifies the date on which the skills earned or demonstrated during the training course are no longer valid for the organization. This field is not populated until the employee record is closed and will be calculated by adding the interval identified on the **General** tab of the **Course Info** window to the last day of the class.

> ***NOTE:*** *This field applies only to courses identified as "Recurring" on the **General** tab of the **Course Info** window or if the **Temporary Training** check box is marked as "checked" in the header of the **Employee Training** window.*

e. **Alert Before Expiration** - Identifies the number of days prior to the skill expiration that selected individuals should be notified. (optional)

> ***NOTE:*** *Alerts will not work unless the Scheduling Server module is being used and a specific task is setup. Instructions on the use of the Scheduling Server module may be found in the procedure "Scheduling Server Module" within the General System section of this manual.*

f. **Attended** group box

i. **From** - Identifies the first day that the employee attended the training (copied from the **Start** field on the Scheduled Trainings Item window).

ii. **To** - Identifies the last day that the employee attended the training (copied from the **End** field on the Scheduled Trainings Item window).

> ***NOTE:*** *The **From** and **To** fields in the **Attended Group** box are not affected in any way by the **Attendance Registry** in the **Scheduled Training Item** window.*

iii. **Grade** - Identifies the grade that the employee received for the course. (optional)

> ***NOTE:*** *To complete the **Grade** field, the appropriate grade code must be listed in the **Course Grade List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Course Grading Codes.***

1. Left-click the **Grade** field.
2. The **Course Grading Codes** search window will appear.
3. Select the appropriate grade (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

iv. **Passed** check box - When marked as "checked," this field identifies that the employee has passed the class.

g. **Missed** group box

i. **Days** - Identifies the number of days of the class that the employee was absent. Enter the number of days missed. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

ii. **Hours** - Identifies the number of hours of the class that the employee was absent. Enter the number of hours missed. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

h. **Message** and **Memo** fields

i. Left-click the **Message** or **Memo** button.

ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.

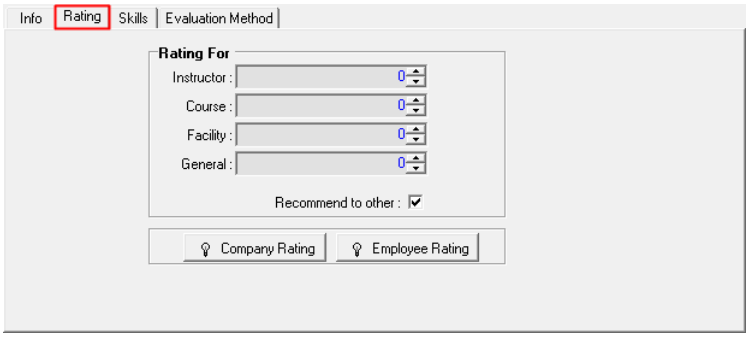
iii. Type the message or memo.

iv. Left-click the **OK** button in the **Memo Editor** toolbar to save the message.

v. When the **Message** or **Memo** field is not blank, the light bulb on the appropriate button will be highlighted in yellow .

3. **Rating** Tab

This tab is used to record employee feedback regarding the class.



a. **Instructor** - Identifies the employee's rating of the instructor on a scale determined by your organization. Enter the number that corresponds to the rating the employee provides for the instructor. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

b. **Course** - Identifies the employee's rating of the course curriculum on a scale determined by your organization. Enter the number that corresponds to the rating the employee provides for the course. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

c. **Facility** - Identifies the employee's rating of the facility on a scale determined by your organization. Enter the number that corresponds to the rating the employee provides for the facility. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

d. **General** - Identifies the employee's overall rating of the class in general on a scale determined by your organization. Enter the number that corresponds to the overall rating the employee provides for the class. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

e. **Recommend to Other** check box - When marked as "checked," this field identifies that the employee would recommend this class to other employees.

f. **Company Rating** button

   i. Left-click the **Company Rating** button.

   ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.

   iii. Type the rating.

   iv. Left-click the **OK** button in the **Memo Editor** toolbar to save the message.

   v. When the **Company Rating** is not blank, the light bulb on the appropriate button will be highlighted in yellow .

g. **Employee Rating** button

i. Left-click the **Employee Rating** button.

ii. The **Memo Editor** window will appear. Left-click the **Edit** button to add notes.

iii. Type the rating.

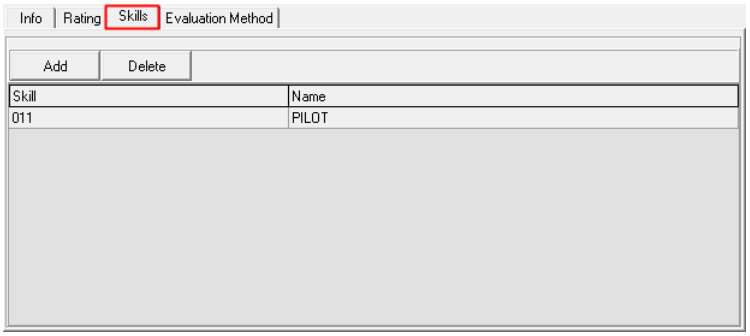
iv. Left-click the **OK** button in the **Memo Editor** toolbar to save the message.

v. When the **Employee Rating** field is not blank, the light bulb on the appropriate button will be highlighted in yellow.

4. **Skills** Tab

Identifies the skills that were earned as a result of the class. When the class is closed, the skills listed on the **Skills** tab will be added to the **Skills** tab of the User file along with a **Good Until** date (if applicable). The skills on this tab are copied from the **Earn Skills** tab on the **Course Info** window, but may be adjusted as necessary.

NOTE: *To complete the **Skills** tab, the appropriate skill(s) must be listed in the **Skills List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Employee Skills.***



a. Add skills

i. Left-click the **Add** button at the top of the **Earn Skills** tab.

ii. The **Skills List** search window will appear.

iii. Select the appropriate skill(s) (left-click the line(s) within the search screen and left-click **OK**).

b. Delete skills

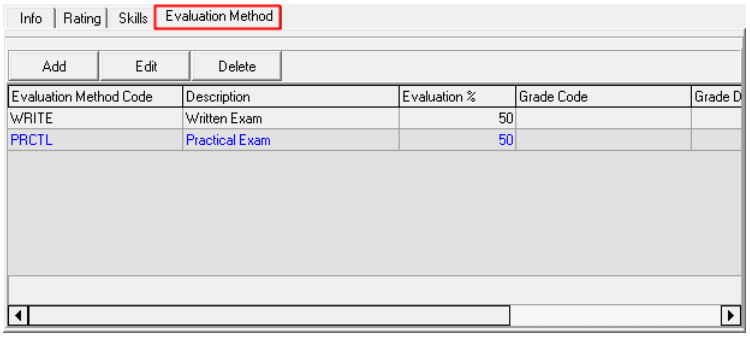
i. Left-click the skill on the **Earn Skills** tab that needs to be deleted.

ii. Left-click the **Delete** button at the top of the **Earn Skills** tab.

5. **Evaluation Method** Tab

Identifies the grades that the employee received on each of the assessments used to demonstrate proficiency in the skill or knowledge of the topic for which the class was given. The evaluation methods on this tab are copied from the **Evaluation Methods** tab on the **Course Info** window, but may be adjusted as necessary.

> ***NOTE:*** *To add evaluation methods to the **Evaluation Method** tab, the appropriate evaluation methods must be listed in the **Evaluation Method List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Evaluation Method.***



a. Add evaluation methods

i. Left-click the **Add** button at the top of the **Evaluation Method** tab.

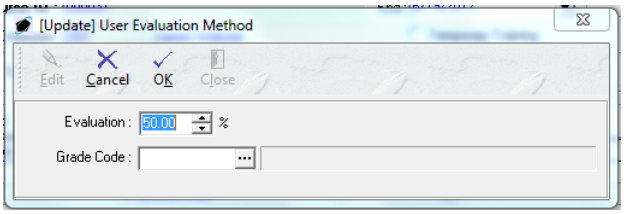
ii. The **Evaluation Method List** window will appear.

iii. Select the appropriate evaluation method(s) (left-click the line(s) within the search screen and left-click **OK**).

b. Update each evaluation method with information regarding the specific class

i. Double-click the line that corresponds to the evaluation method that is to be completed (or left-click the line that corresponds to the evaluation method that is to be completed and left-click the **Edit** button at the top of the **Evaluation Method** tab).

ii. The **[Update] User Evaluation Method** window will appear.



1. **Evaluation** - Identifies the percentage of the total course grade that is determined by this evaluation factor (copied from the **Evaluation Method** on the **Course Info** tab)

2. **Grade Code** - Identifies the grade that the employee received for the evaluation method. (optional)

> ***NOTE:*** *To complete the **Grade** field, the appropriate grade code must be listed in the **Course Grade List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Course Grading Codes.***

a. Left-click the **Grade** field.

b. The **Course Grading Codes** search window will appear.

c. Select the appropriate grade (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

3. Left-click the **OK** button in the **[Update] User Evaluation Method** window.

4. Left-click the **Close** button in the **[Update] User Evaluation Method** window.

c. Delete evaluation methods

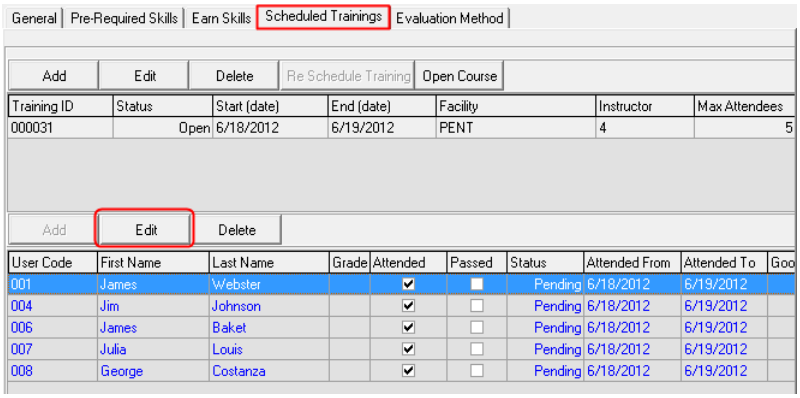
i. Left-click the evaluation method on the **Evaluation Method** tab that needs to be deleted.

ii. Left-click the **Delete** button at the top of the **Evaluation Method** tab.

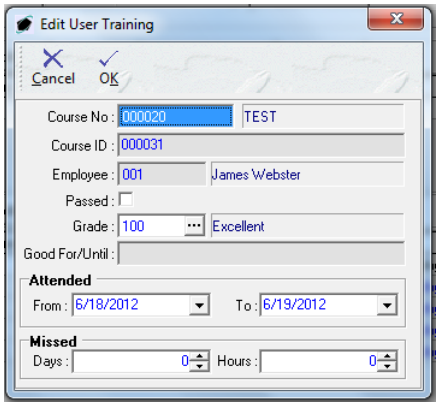
vii. Left-click the **OK** button on the **Employee Training** toolbar. The **Employee Training** window will exit edit mode and the title bar will read **Employee Training**.

viii. Left-click the **Close** button on the **Employee Training** toolbar.

ix. **ALTERNATE** - A portion of the necessary fields may be completed by left-clicking the line that corresponds to the employee and left-clicking the **Edit** button at the bottom of the **Scheduled Trainings** tab).



The **Edit User Training** window will appear.



1. **Course No** - identifies the number that corresponds to the course that the employee has attended (copied from the **Course Info** header).
2. **Course ID** - identifies the number that corresponds to the specific training class that the employee has attended (copied from the **Scheduled Trainings Item** window).
3. **Employee** - identifies the employee for which the training record is applicable.
4. **Passed** check box - When marked as "checked," this field identifies that the employee has passed the class.
5. **Grade** - Identifies the grade that the employee received for the course. (optional)

   NOTE: *To complete the **Grade** field, the appropriate grade code must be listed in the **Course Grade List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users & Groups**, and left-click **Course Grading Codes.***

   a. Left-click the **Grade** field.

   b. The **Course Grading Codes** search window will appear.

   c. Select the appropriate grade (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

6. **Good For/Until** - Identifies the date on which the skills earned or demonstrated during the training course are no longer valid for the organization. This field is not populated until the employee record is closed and will be calculated by adding the interval identified on the **General** tab of the **Course Info** window to the last day of the class.

   NOTE: *This field applies only to courses identified as "Recurring" on the **General** tab of the **Course Info** window.*

7. **Attended** group box

   a. **From** - Identifies the first day that the employee attended the training (copied from the **Start** field on the Scheduled Trainings Item window).

b. **To** - Identifies the last day that the employee attended the training (copied from the **End** field on the Scheduled Trainings Item window).

> ***NOTE:*** *The **From** and **To** fields in the **Attended Group** box are not affected in any way by the **Attendance Registry** in the **Scheduled Training Item** window.*

8. **Missed** group box

a. **Days** - Identifies the number of days of the class that the employee was absent. Enter the number of days missed. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

b. **Hours** - Identifies the number of hours of the class that the employee was absent. Enter the number of hours missed. The spinner arrows may also be used to adjust the number in whole number increments. (optional)

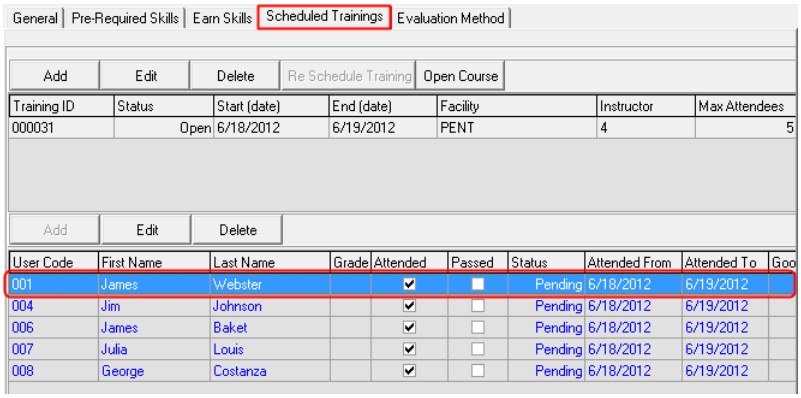
g. Closing a Employee Training Record

i. Left-click the **Edit** button on the **Course Info** toolbar to enter **Edit** mode.

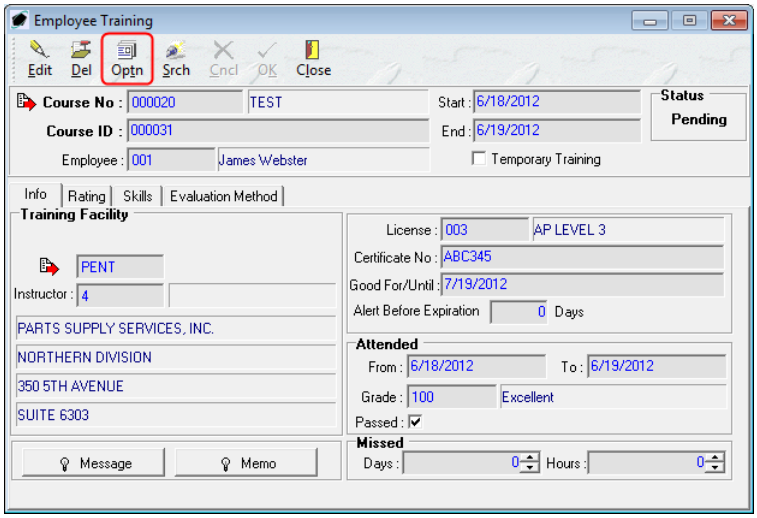
ii. Left-click the **Scheduled Trainings** tab.

iii. Left-click the line that corresponds to the class that the employee attended.

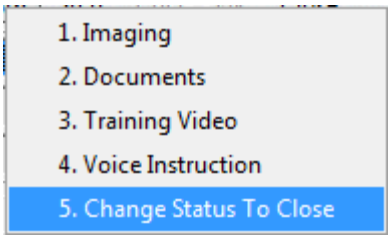
iv. Double-click the line that corresponds to the employee training record that is to be completed.



v. The **Employee Training** window will appear. Left-click the **Optn** button from the **Employee Training** toolbar.



vi. Left-click **5. Change Status to Close** to close the employee training record.



> ***NOTE:*** *Once the status has been changed to "Closed", the status cannot be changed and no information may be added or changed on the employee training record. Ensure all information is correct prior to changing the status to "Closed"*

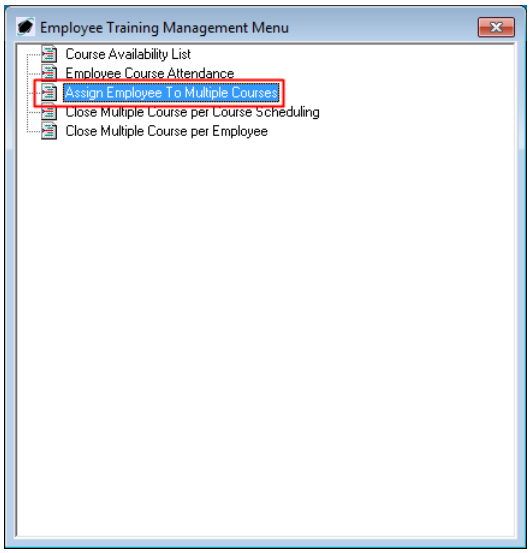
vii. Left-click the **Close** button on the **Employee Training** toolbar.

4. Advanced Functions

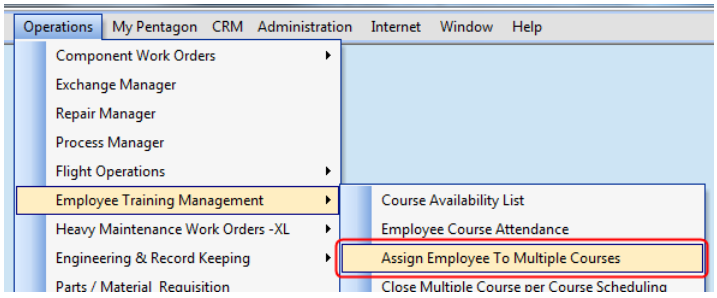
a. Assign Employee to Multiple Courses

This option was designed to be used in situations where a single employee is required to take numerous courses at one time (i.e. a new hire or annual proficiency exams). Rather than having to open each course, create a training class to accommodate the one employee, and assign the employee to that one class; the **Assign Employee to Multiple Courses** option makes the process much faster and easier. This option allows training classes for numerous courses to be created and the employee to be enrolled in all of those classes in just a few clicks.

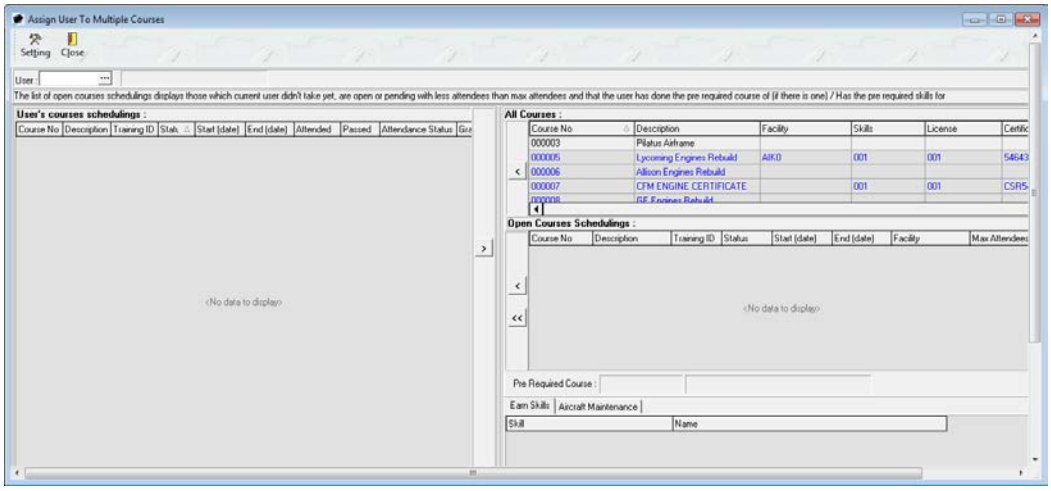
i. From the **Employee Training Management Menu**, double-click the "Assign Employee To Multiple Courses" option.



NOTE: *This option may also be accessed from the toolbar. Left-click the* ***Operations*** *item from the toolbar, go to* ***Employee Training Management****, and left-click* ***Assign Employee To Multiple Courses****.*



ii. The **Assign User To Multiple Courses** window will appear.

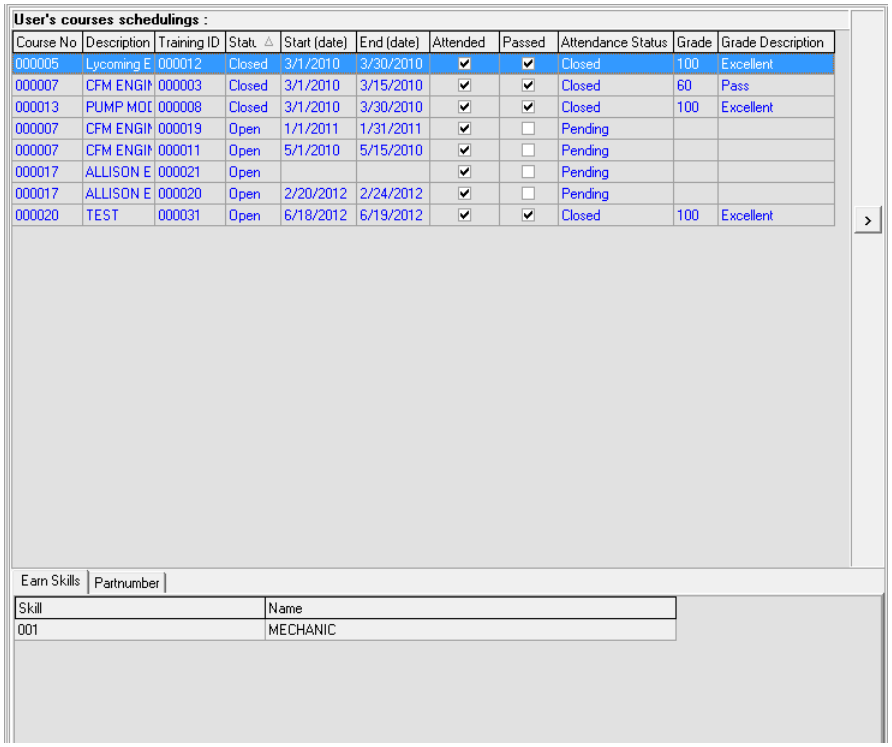


iii. Identify the employee that needs to be assigned to multiple courses.

> ***NOTE:*** *To complete the **User** field, the employee must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.*
>
> *Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.*

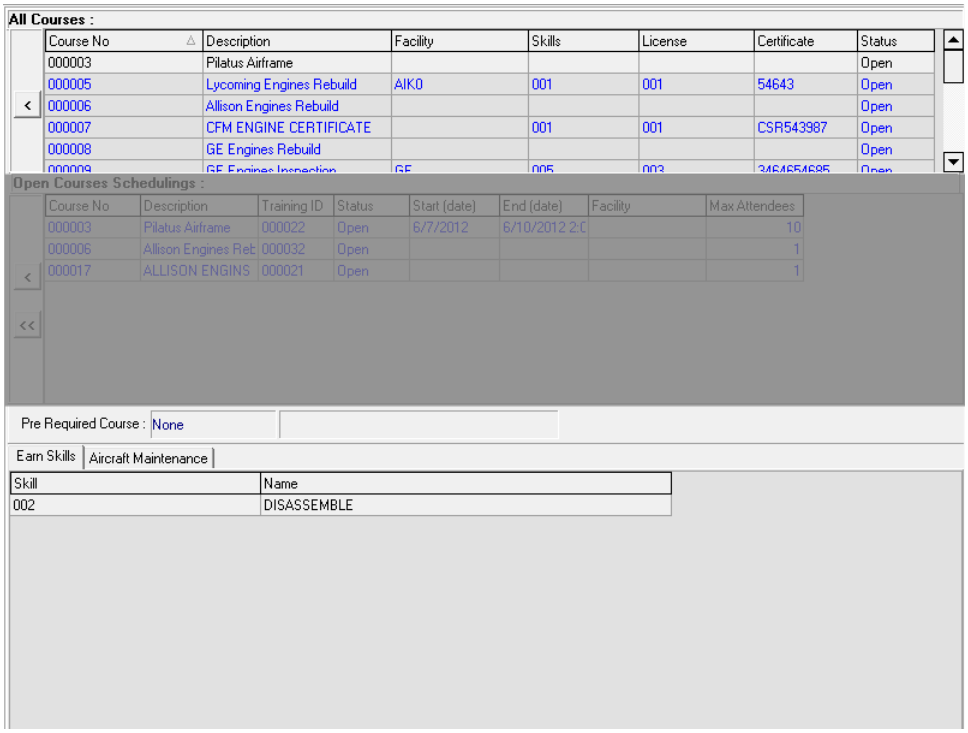
1. Left-click the **User** field.
2. The **Users List** search window will appear.
3. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

iv. The **User's course schedulings** section:



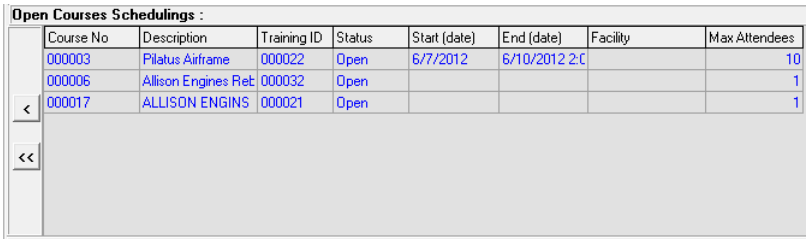
1. In the upper part of this section, a list of all training classes in which the employee has been enrolled will appear.
2. In the lower part of this section, tabs indicating required skills, earned skills, and course topics will appear if applicable.

v. **All Courses** section



1. In the upper part of this section, a list of all courses available will appear.
2. In the lower part of this section (the **Open Courses Schedulings** section separates the upper and lower parts), the pre-required course is listed (if applicable) and tabs indicating required skills, earned skills, and course topics will appear if applicable.

vi. **Open Course Schedulings** section



Lists all training classes (1) that have a **Status** of "Open" or "Pending", (2) that have not been taken by the employee, (3) that have less than the max number of employees attending, and (4) for which the employee has met all prerequisite requirements.

vii. Creating classes for multiple courses.

1. In the Open Courses section, left-click the line that corresponds to the course for which a training class needs to be created.

2. Left-click the single left arrow button ‹ to add a training class to the **User's courses schedulings** section.

> ***NOTE:*** *Left-clicking the single left arrow both creates a training class with a **Max Number of Employees** equal to one and adds the employee to the training class.*

viii. Removing the employee from a training class.

> ***NOTE:*** *The employee may only be removed from a training class if the training class **Status** (fourth column) is not "Closed" and the **Attendance Status** (ninth column) is not "Closed".*

1. In the **User's courses schedulings** section, left-click the line that corresponds to the training class from which the employee needs to be removed.
2. Left-click the single right arrow button › to remove the employee from the training class.
3. The training class from which the employee is removed will be moved to the **Open Courses Schedulings** section.

ix. Adding the employee to existing training classes

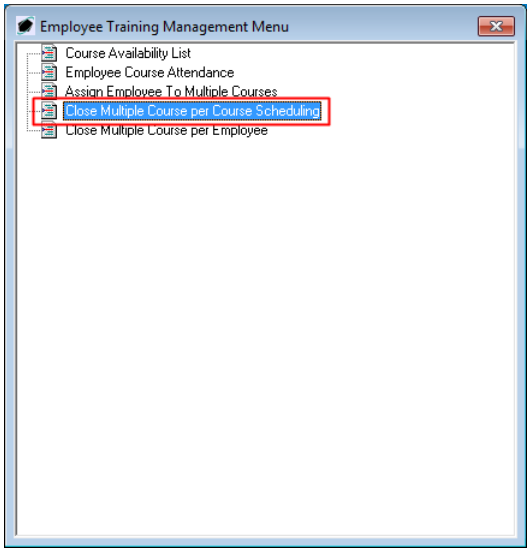
1. In the **Open Courses Schedulings** section, left-click the line that corresponds to the existing training class to which the employee should be added.
2. Left-click the single left arrow button ‹ to add the employee to the training class.
3. The training class to which the employee is added will be moved to the **User's courses schedulings** section.

> ***NOTE:*** *The employee may be added to all existing training classes listed in the **Open Courses Schedulings** section by left-clicking the double left arrow button «.*

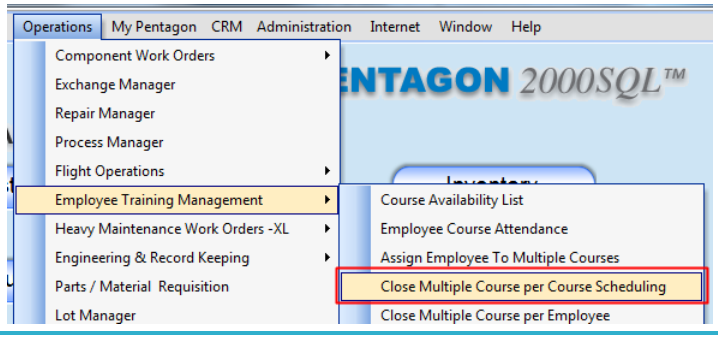
b. **Close Multiple Course per Course Scheduling**

This option was designed to be used in situations where it is more important to have employee training records closed and the employee's skill list updated quickly than to record a large amount of information regarding those employee training records. Rather than having to open each course, select a training class, open each employee training record, complete each employee training record, and close each employee training record; the **Close Multiple Course per Course Scheduling** option makes the process much faster and easier. This option allows all employee training records for a specific training class to be completed (with limited information) and closed in just a few clicks.

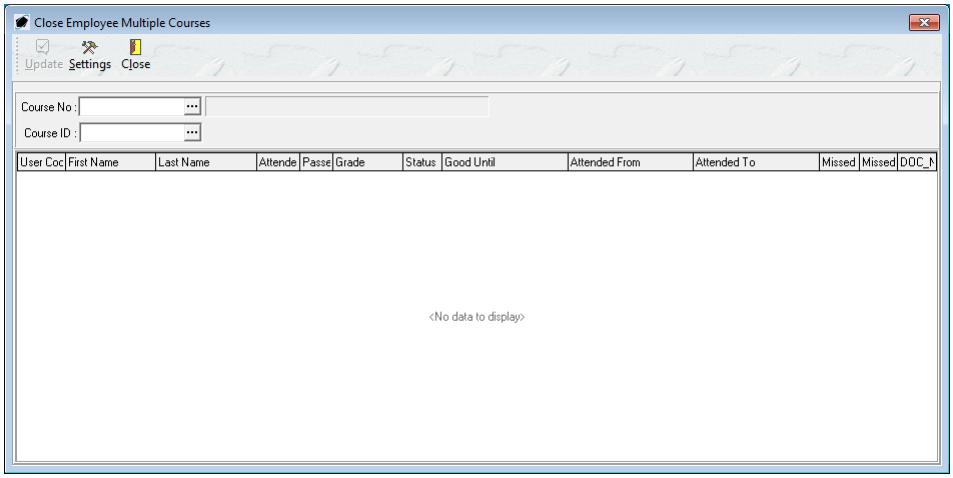
i. From the **Employee Training Management Menu**, double-click the "Close Multiple Course per Course Scheduling" option.



NOTE: *This option may also be accessed from the toolbar. Left-click the* ***Operations*** *item from the toolbar, go to* ***Employee Training Management****, and left-click* ***Close Multiple Course per Course Scheduling****.*



ii. The **Close Employee Multiple Courses** window will appear.



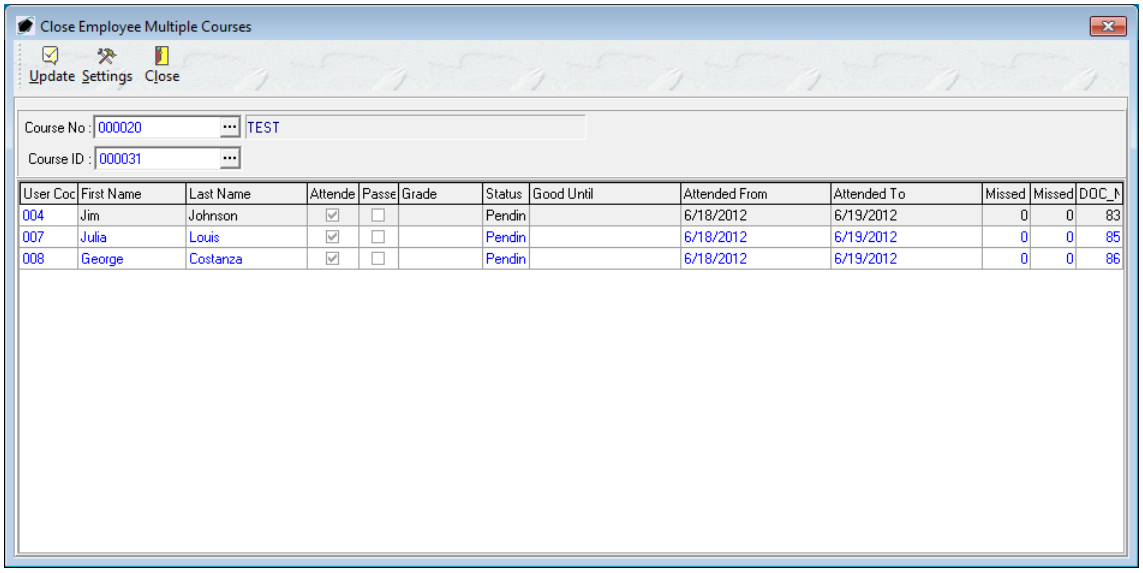
iii. Identify the **Course No** for the training class for which the employee training records need to be completed and closed.

1. Left-click the **Course No** field.
2. The **Course Availability List** search window.
3. Select the appropriate course (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

iv. Identify the **Course ID** for the training class for which the employee training records need to be completed and closed.

1. Left-click the **Course ID** field.
2. The **Scheduled Trainings** search window.
3. Select the appropriate class (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

v. The list of employee training records (that have not already been closed) will appear.



vi. Left-click the line that corresponds to the employee training record that needs to be completed.

1. Left-click the check box in the **Passed** column to indicate that the employee passed the class.

> ***NOTE:*** *The **Passed** check box must be marked as "checked" in order for the skills earned by the training class to appear on the **Skills** tab of the employee's User file.*

2. Indicate the grade received by the employee.
   a. Left-click the **Grade** field.
   b. The **Course Grading Codes** search window will appear.
   c. Select the appropriate grade (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
3. Indicate the date on which the skills earned or demonstrated during the training course are no longer valid for the organization.
   a. Left-click the down arrow in the **Good Until** field.
   b. The clock widget will appear. Left-click the appropriate date.

> ***NOTE:*** *The date may also be manually typed.*

4. Ensure that the **Attended From** and **Attended To** fields are correct.
5. Ensure that the **Missed Days** and **Missed Hours** fields are completed.

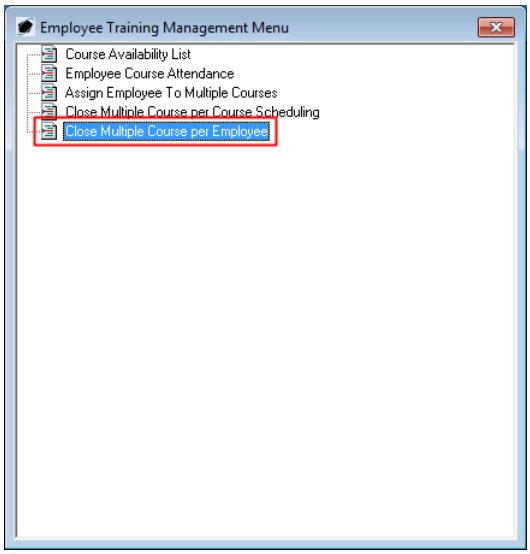
vii. After each line has been completed, close the training records by left-clicking the **Update** button in the **Close Employee Multiple Courses** toolbar.

> ***NOTE:*** *Once the status has been changed to "Closed", the status cannot be changed and no information may be added or changed on the employee training record. Ensure all information is correct prior to changing the status to "Closed"*

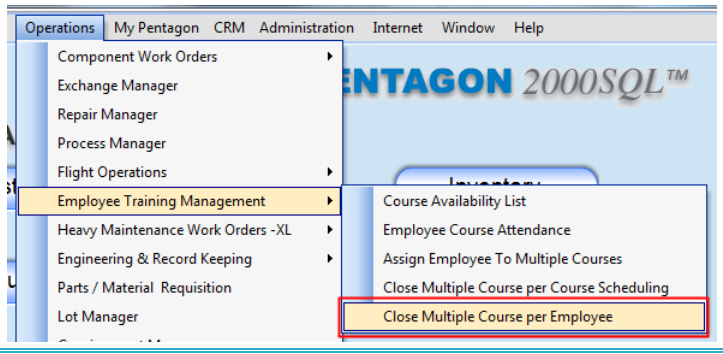
c. **Close Multiple Course per Employee**

This option was designed to be used in situations where a single employee is required to take numerous courses at one time (i.e. a new hire or annual proficiency exams). Rather than having to open each course, open each training class, complete each training class, and close each training class; the **Close Multiple Course per Employee** option makes the process much faster and easier. This option allows all open training classes for a single employee to be completed and closed in just a few clicks.

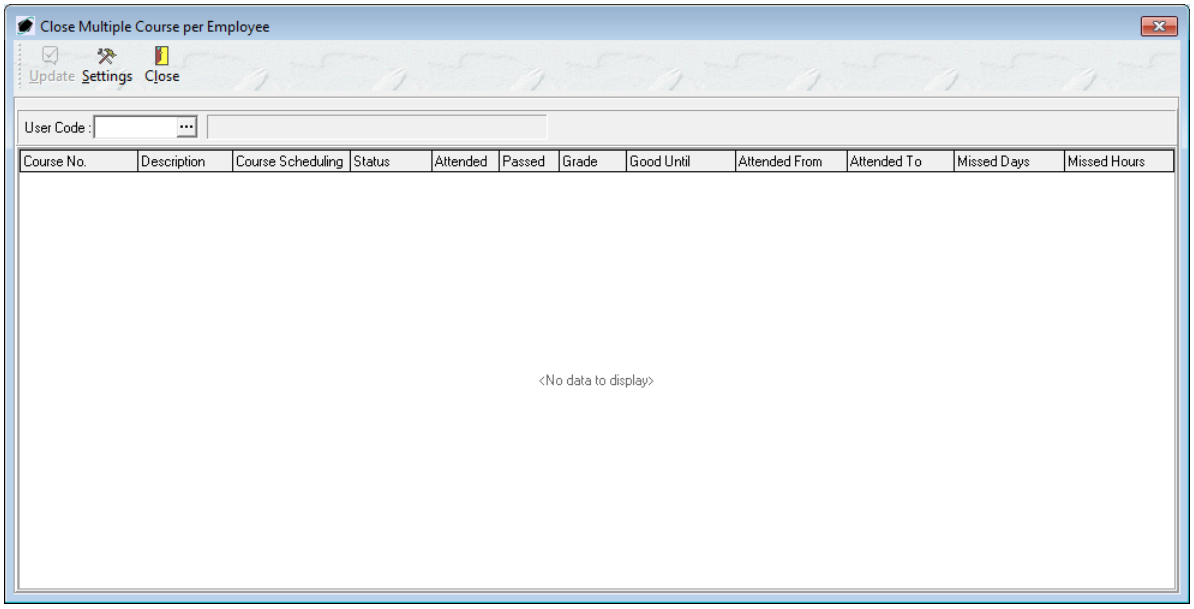
i. From the **Employee Training Management Menu**, double-click the "Close Multiple Course per Employee" option.



NOTE: *This option may also be accessed from the toolbar. Left-click the* ***Operations*** *item from the toolbar, go to* ***Employee Training Management****, and left-click* ***Close Multiple Course per Employee****.*



ii. The **Assign User To Multiple Courses** window will appear.

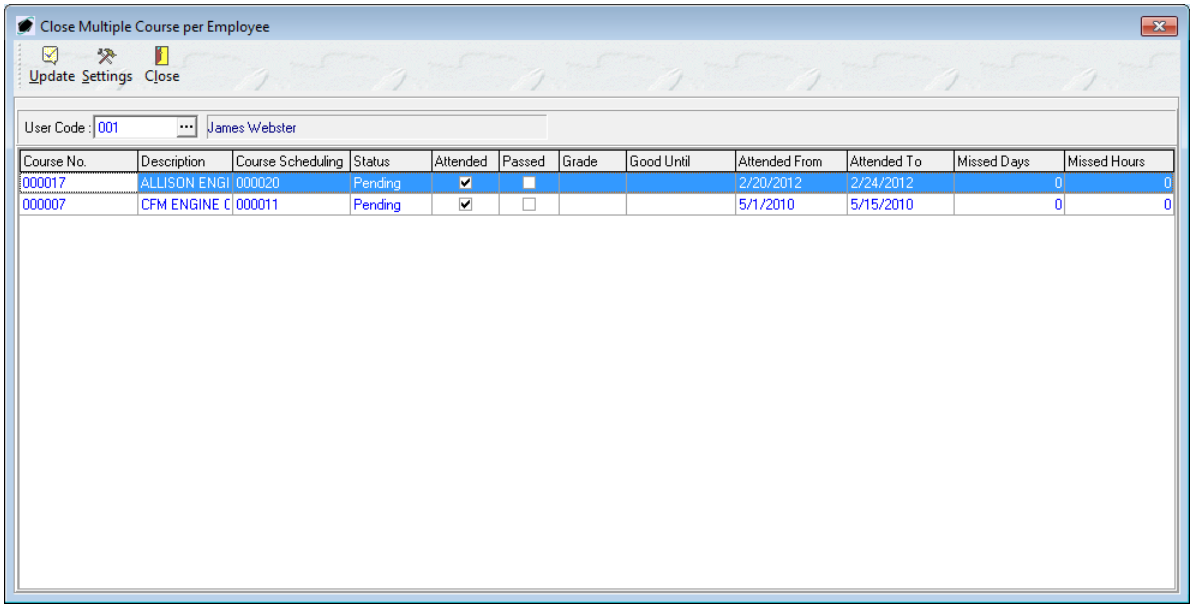


iii. Identify the employee for which multiple courses need to be closed.

> ***NOTE:*** *To complete the **User** field, the employee must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.*
>
> *Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.*

1. Left-click the **User** field.
2. The **Users List** search window will appear.
3. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

iv. The list of employee training records (that have not already been closed) will appear.



v. Left-click the line that corresponds to the employee training record that needs to be completed.

1. Left-click the check box in the **Passed** column to indicate that the employee passed the class.

> ***NOTE:*** *The **Passed** check box must be marked as "checked" in order for the skills earned by the training class to appear on the **Skills** tab of the employee's User file.*

2. Indicate the grade received by the employee.
   a. Left-click the **Grade** field.
   b. The **Course Grading Codes** search window will appear.
   c. Select the appropriate grade (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
3. Indicate the date on which the skills earned or demonstrated during the training course are no longer valid for the organization.
   a. Left-click the down arrow in the **Good Until** field.
   b. The clock widget will appear. Left-click the appropriate date.

> ***NOTE:*** *The date may also be manually typed.*

4. Ensure that the **Attended From** and **Attended To** fields are correct.
5. Ensure that the **Missed Days** and **Missed Hours** fields are completed.

vi. After each line has been completed, close the training records by left-clicking the **Update** button in the **Close Multiple Course per Employee** toolbar.

> ***NOTE:*** *Once the status has been changed to "Closed", the status cannot be changed and no information may be added or changed on the employee training record. Ensure all information is correct prior to changing the status to "Closed"*