build smart

your total hr solution...

Buildsmart HR

Training & Development Records Overview

Index

1. Training History Introduction

The Training History function within Buildsmart HR allows users to capture and maintain information related to training received by and planned for employees.

Employee Maintenance	Notes	i	Employee Training History	Apply	Cancel

Company
Personal Details
Medical Details
Education, Training & S...
- Education
- Training History
- Skills & Experience
- Development Plans
- Languages

Performance & Succe...
Employment Details
Pay / Leave
Mass Capture
Reports

Select Payroll

Employee

Search By ID Nr. [ ] Search Or Name & Nr. [ ] Search

Employee Number	Cost Centre	ID / Passport No. 4707310148081	Engagement Date 2006-10-01	Length of Service Years 2 Days 184	Status Transferred In

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Basic Training Details

Identified Needs

Completed / Planned   ⦿ Completed ○ Planned

Course Code / Name   Basic Telephone Skills ▾

Course Category   [ ] ▾

Internal / External   ⦿ Internal ○ External

Course Start Date   20 July ▾ 2006 Calendar

Course End Date   20 July ▾ 2006 Calendar

Course Duration   ⦿ System ○ Manual

	Working	Non-Working
Days	1	0
Hours	8	0

Type of Course   [ ] ▾

Basic Training Details

The basic details of training received by the employee may be captured here.

This includes the Course Name, Attended Dates, and Duration. Training can also be defined as being Internally or Externally provided as well as being part of the company's Workplace Skills Plan.

Course Duration
To override the system calculation for course duration, select the Manual radial button.

Working and Non-working
Working days/hours refer to time spent training the employee during working time. Non-working days/hours refers to time spent after working hours e.g. at night or weekends.

2. Training History Screens and Functionality

The Training History facility has been divided into nine screens to facilitate the following functions:

- Basic Training Details;
- NQF Details;
- Post Course Details;
- Costing;
- Venues & Instructors (Internal);
- Venues & Instructors (External);
- Contracts;
- Restrictions; and
- Summary

These are further explained as follows:

2.1. Basic Training Details

The "Basic Training Details" screen allows for the capture of the basic information of training that an employee has or will receive. Such information includes:

- Whether the Course is Planned or Completed;
- The Course Code / Name and Category;
- Whether training was / will be Internally or Externally provided;
- The course Start Date and End Date;
- The Course Duration:
  - System or Manually calculated;
  - Number of Working Days/Hours spent / to be spent on training;
  - Number of Non-working Days/Hours spent / to be spent on training;
- The Type of Course;
- Learning Matrix Category;
- Whether the training is Part of WSP; and
- Any Comments regarding the training received or planned.

Course records are displayed in the following colours according to their status for quick identification:

- Black   = Completed
- Blue   = Planned
- Red   = Planned and overdue
- Green   = Current

Please Note the planned courses will be excluded from reports pertaining to workplace skill plans and annual training received. Once a planned course has been completed the record must be updated to "completed".

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 4 of 49

Monday, November 19, 2012

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Basic Training Details

[Identified Needs]

Completed / Planned	⦿ Completed ○ Planned
Course Code / Name	[▾]
Course Category	[▾]
Internal / External	⦿ Internal ○ External
Course Start Date	dd [month ▾] yyyy [Calendar]
Course End Date	dd [month ▾] yyyy [Calendar]
Course Duration	⦿ System ○ Manual

	Working	Non-Working
Days	0	0
Hours	0	0

Type of Course	[▾]
Learning Matrix Category	[▾]
Part of WSP	○ Yes ⦿ No
Comments	[ ]

[Add] [Update] [Remove] [Remove All]

Training Summary

Course Code / ...	Course Category	Start Date	End Date	Completed
Activewhere	Administration	23/03/2009	23/03/2009	Planned
Product Traini...	Products	09/03/2009	13/03/2009	Planned
AIDS IN THE W...		02/03/2009	06/03/2009	Planned
AIDS IN THE W...		10/03/2008	10/03/2008	Completed
Basic Telepho...		20/07/2006	20/07/2006	Completed

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 5 of 49

Monday, November 19, 2012

2.2. NQF Details

The "NQF Details" screen allows users to capture all NQF information related to training courses. Information includes:

- NQF Details such as:
  - The NQF Option which caters for ;
    - Internal Courses – these courses have a NQF level and minimum credits assigned to them for internal use and are not recognised or aligned with NQF standards.
    - Aligned Courses – these courses are internally designed using various unit standards recognised by the NQF.
    - Recognised Courses – these courses are registered and recognised by the NQF.
- Whether the training course is Unit Standard based or a Qualification (this is only available for courses that are Aligned with or Recognised by NQF). Information that may be captured for Unit Standards and Qualifications include the:
  - SAQA ID and Title;
  - NQF Level;
  - Minimum Credits;
  - Accrediting ETQA; and
  - SAQA Decision Number
- SETA Claim Details such as:
  - The Date and Amount Claimed; and
  - The Date and Amount Reimbursed

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 6 of 49

Monday, November 19, 2012

![build smart logo]

your total hr solution...

Internal NQF Details

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Select a Course...

Course Code /...	Course Category	Start Date	End Date	Completed
Activewhere	Administration	23/03/2009	23/03/2009	Planned
Product Traini...	Products	09/03/2009	13/03/2009	Planned
AIDS IN THE ...		02/03/2009	06/03/2009	Planned
AIDS IN THE ...		10/03/2008	10/03/2008	Completed
Basic Telepho...		20/07/2006	20/07/2006	Completed

[Clear All] [Update]

NQF Details

NQF Option — `Internal ▼`

Unit Standard / Qualification — `▼`

Internal NQF Details

NQF Level — `▼`

(Minimum) Credits — `____`

SETA Claim Details

SETA Claim Date — `dd` `month ▼` `yyyy` [Calendar]

Amount Claimed — `____`

Date Reimbursed — `dd` `month ▼` `yyyy` [Calendar]

Amount Reimbursed — `____`

Comments — `____`

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 7 of 49

Monday, November 19, 2012

For Unit Standard-based courses

NQF Details

| NQF Option | Recognised ▼ |
| Unit Standard / Qualification | Unit Standard Based ▼ |

Unit Standard Information

◉ Summarised ◯ Detailed

SAQA Unit Standard ID

SAQA Unit Standard Title

NQF Level ▼

(Minimum) Credits

Accrediting ETQA ▼

SAQA Decision Number

Assessed By

[Add] [Update] [Remove] [Remove All]

Unit Standard Summary

ID	Title	NQF Level	Credits

Total Credits

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 8 of 49

Monday, November 19, 2012

For Qualifications

NQF Details

NQF Option	Recognised
Unit Standard / Qualification	Qualification Based

Qualification Information

○ Summarised ○ Detailed

SAQA Qualification ID	
SAQA Qualification Title	
NQF Level	
(Minimum) Credits	
Accrediting ETQA	
SAQA Decision Number	
Assessed By	

Unit Standard Information

SAQA Unit Standard ID	
SAQA Unit Standard Title	
NQF Level	
(Minimum) Credits	

Add	Update	Remove	Remove All

Unit Standard Summary

ID	Title	NQF Level	Credits

Total Credits

Add	Update	Remove	Remove All

Qualification Summary

ID	Title	NQF Level	Credits	Unit Standards

2.3. Post-Course Details

The "Post-Course Details" screen allows users to capture and maintain information related to post course evaluations conducted after employees have received training. Information includes:

- Post Course Evaluation such as:
  - Employee Results and whether the employee passed;
  - The Course Assessment and Date of Assessment;
  - If the employee is competent;
  - If the employee needs to re-do training; and
  - Instructor's Assessment of the employee

- Follow-up Details such as:
  - Whether the employee requires follow-up,
  - Who is to follow-up;
  - By when; and
  - Whether follow-up has occurred and the outcome thereof

- Project / Assignment Details such as:
  - If the employee has been given a Project / Assignment as part of the training;
  - The Issued, Start and Expected End Dates;
  - Extension Details; and
  - Completion Date

- Certificate Details such as:
  - Type of Certificate issued (Competency, Attendance and Other);
  - The Certificate Number; and
  - Date of Issue, Validity Period and Expiry Date

- Skills Acquired from Training – allows the user to capture any skill acquired from the training course.

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Select a Course...

Course Code /...	Course Category	Start Date	End Date	Completed
Activewhere	Administration	23/03/2009	23/03/2009	Planned
Product Traini...	Products	09/03/2009	13/03/2009	Planned
AIDS IN THE ...		02/03/2009	06/03/2009	Planned
AIDS IN THE ...		10/03/2008	10/03/2008	Completed
Basic Telepho...		20/07/2006	20/07/2006	Completed

[Clear All]   [Update]

Post Course Evaluation

Course Minimum Pass Rate	[▼]
Employee's Result	[▼]
Pass Course?	⊙ Not Applicable ○ Yes ○ No
Course Assessment	[ ]
Date of Assessment	[dd] [month ▼] [yyyy] [Calendar]
Competent	⊙ Not Applicable ○ Yes ○ No
Re-do Course	⊙ Not Applicable ○ Yes ○ No
Completed Evaluation Questionnaire?	⊙ Not Applicable ○ Yes ○ No
Employee's Assessment of Training	[ ]
Instructor's Assessment of Employee	[ ]

Follow-up Details

Follow-up Required? ⦿ Not Applicable ◯ Yes ◯ No

Follow-up Reason? [▼]

Who is to Follow-up [   ]

By When [dd] [month ▼] [yyyy] [Calendar]

Follow-up Occured ◯ Yes ⦿ No

Employee given Project / Assignment ⦿ Not Applicable ◯ Yes ◯ No

Comments [   ]

Certificate Details

Issue Certificate? ⦿ Not Applicable ◯ Yes ◯ No

Certificate Type ☐ Competency ☐ Attendance ☐ Other

Certificate Number [   ]

Date Issued [dd] [month ▼] [yyyy] [Calendar]

Validity Period [▼] [   ]

Expiry Date [dd] [month ▼] [yyyy] [Calendar]

Skills Acquired from Training

Skill Code / Description [▼]

2.4. Costing Details

The "Course Costing" screen allows users to capture all costs incurred to train an employee. Information includes:

- The Direct Costs send the employee on training such as:
  - Travel Costs;
  - Accommodation Costs;
  - Subsistence Costs; and
  - Other Direct Costs;
- Course Costs such as:
  - The cost of the Course; and
  - Other Course Costs;
- The Employee Time Cost - this is the cost to the company to have the employee on training during working days/hours.

Please note that the Employee Time Cost can either be calculated by the system using the employee's hourly rate of pay and the number of hours on training as defined in the Basic Course Details screen, or can be manually defined. Users can determine whether to default the system to calculate all employee time cost or for employee time cost to be manually defined in the Company Maintenance> System Parameters screen. This default can be overridden at the employee level.

The option to let the system calculate the employee time cost will only be available to users that have permission to employee pay / package information.

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 13 of 49

Monday, November 19, 2012

2.5. Venues & Instructors (Internal)

The "Venue & Instructors (Internal)" screen allows users to capture information related to internal venues and instructors (employees) used / to be used to facilitate training. Internal venues are venues located 'inside your company" and used to host training and internal instructors are those employees that work for your company and are qualified to instruct / facilitate training courses. Information includes:

- The Venue Details;
- The Internal Venue Code / Name;
- The Payroll in which the instructor (employee) resides; and
- The Name of the Instructor (employee)

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 14 of 49

Monday, November 19, 2012

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Select a Course...

Course Code /...	Course Category	Start Date	End Date	Completed
Activewhere	Administration	23/03/2009	23/03/2009	Planned
Product Traini...	Products	09/03/2009	13/03/2009	Planned
AIDS IN THE ...		02/03/2009	06/03/2009	Planned
AIDS IN THE ...		10/03/2008	10/03/2008	Completed
Basic Telepho...		20/07/2006	20/07/2006	Completed

[Clear All] [Update]

Internal Details

Internal Venue Details

Venue Details [   ]

Intenal Venue Code / Name [▼]

Internal Instructor Details

Presenter [Anthea Cowan   ]

Payroll [▼]

Instructor Name [▼]

2.6. Venues & Instructors (External)

The "Venue & Instructors (External)" screen allows users to capture information related to the vendors, external venues and external instructors used to facilitate training. Information includes:

- Vendor Details such as:
  - The name of the Company / Institution;
  - The Type of Institution (Training Provider, University etc);
  - The Vendor Code / Name
- External Venue Details such as:
  - The Venue Details;
  - The External Venue Code / Name;
  - The Vendor's Venue Code / Name;
- External Instructor Details such as:
  - The name of the Presenter; and
  - The name of the Vendor's Instructor

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Select a Course...

Course Code / ...	Course Category	Start Date	End Date	Completed
Activewhere	Administration	23/03/2009	23/03/2009	Planned
Product Traini...	Products	09/03/2009	13/03/2009	Planned
AIDS IN THE ...		02/03/2009	06/03/2009	Planned
AIDS IN THE ...		10/03/2008	10/03/2008	Completed
Basic Telepho...		20/07/2006	20/07/2006	Completed

Clear All   Update

External Details

Vendor Details

Company / Institution

Type of Institution

Vendor Code / Name

External Venue Details

Venue Details

External Venue Code / Name

Vendor Venue Code / Name

External Instructor Details

Presenter

Instructor Name

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 16 of 49

Monday, November 19, 2012

2.7. Contracts

The "Contracts" screen allows users to capture details related to contractual agreements entered into between the employee and employer regarding training. Information includes:

- The Cost to Company to train the employee;
- The Required Employment Period after Completion of Training;
- The Write-off Amount per month;
- The Start and End Dates;
- Any Repayment Conditions;
- If the Contract is on-hand and signed by the Employee and Employer; and
- When the Contract has Ended

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Select a Course...

Course Code /...	Course Category	Start Date	End Date	Completed
Activewhere	Administration	23/03/2009	23/03/2009	Planned
Product Traini...	Products	09/03/2009	13/03/2009	Planned
AIDS IN THE ...		02/03/2009	06/03/2009	Planned
AIDS IN THE ...		10/03/2008	10/03/2008	Completed
Basic Telepho...		20/07/2006	20/07/2006	Completed

[Clear All] [Update]

Contractual Agreements

Employee has Contract	⦿ Not Applicable ◯ Yes ◯ No
Cost to Company	0.00
Required Employment Period after Completion of Training	▾ 0
Write-off Amount	0.00 Per Month
Start Date	dd month ▾ yyyy [Calendar]
Expected End Date	dd month ▾ yyyy [Calendar]
Deduct from Payroll?	◯ Yes ⦿ No

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 18 of 49

Monday, November 19, 2012

2.8. Restrictions

The "Restrictions" screen allows users to capture information related to training restrictions placed on an employee.   Information includes:

- The training course(s) that the employee is prohibited from attending;
- The Reason for Restriction
- The Start Date and Expected End Date or Time Period of the restriction;
- The End Date, Reason, and Who Authorised the restriction to be ended

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 19 of 49

Monday, November 19, 2012

2.9. Summary

The "Summary" screen allows users to view a summary of an employee's training and training statistics. Users can select to view an employee's training by:

- Completed or Planned courses;
- Up to the Current Date; and
- For a specific Year or Period.

The following statistics can be viewed:
- Course Statistics such as:
  - Number of Courses Attended;
  - Number of Course still to be Attended;
  - Number of Courses Passed;
  - Number of Days (Working) on Training;
  - Number of Hours (Working) on Training;
  - Number of Outstanding Projects; and
  - Number of Restrictions
- NQF Statistics such as:
  - Number of NQF Recognised Courses;
  - Number of NQF Aligned Courses;
  - Number of NQF Internal Courses;
  - Number of Credits; and
  - Number of Courses part of WSP
- Costs / Expenditure such as:
  - Employee Direct Costs;
  - Course Costs;
  - Totals Excluding Employee Time Costs; and
  - Totals Including Employee Time Costs;

- SETA Claim information such as:
  - Total Amount Claimed; and
  - Total Amount Reimbursed;

Basic Training Details	NQF Details	Post Course Details
Course Costing Details	Venues & Instructors (Int.)	Venues & Instructors (Ext.)
Contract Details	Restrictions	Summary

Employee Training Statistics

◉ Completed ○ Planned

Date Periods

◉ To Current Date

○ Selected Period

Year	[▼]
From Date	dd [month ▼] yyyy [Calendar]
To Date	dd [month ▼] yyyy [Calendar]

	Internal	External	Total
Course Statistics			
Courses Attended	2	0	2
Courses Passed	0	0	0
Working Days on Training	1.25	0.00	1.25
Working Hours on Training	10	0	10
Outstanding Projects	0	0	0
Current Restrictions			0
NQF Statistics			
NQF Recognised Courses	0	0	0
NQF Aligned Courses	0	0	0
NQF Internal Courses	0	0	0
Credits - Unit Standards	0	0	0
Credits - Qualifications	0	0	0
Credits - Internal	0.0	0.0	0.0
Courses Part of WSP	0	0	0
Costs / Expenditure			
Employee Direct Costs	3.87	0.00	3.87
Course Costs	0.00	0.00	0.00
Total Excl. Employee Time Cost	3.87	0.00	3.87
Total Incl. Employee Time Cost	318.48	0.00	318.48
SETA Claims			
Total Amount Claimed	0.00	0.00	0.00
Total Amount Reimbursed	0.00	0.00	0.00

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 21 of 49

Monday, November 19, 2012

3. Training History Reports

The following Training reports are available:

- **Training Received Summary**

This report will display all employees that have received training per training course and will allow users to see which employees have attended which training course(s) in a particular time period. The report can be selected by training course, cost centre, department and date period. The report will be located in the Skills and Training Reports category.

Tax Year: (Tax Year: 2006-03-01 - 2007-02-28)   Print Date : 21/05/2008

Payroll Demo
PSIberSTAFF
Training Received Summary

For Period: 21-May-2008

Employee		Internal / External	Start Date	End Date	Course Duration				Part of WSP	NQF Option	Unit Standard / Qualification	Pass Course	Competent
					Working		Non-Working						
					Days	Hours	Days	Hours					
Course Code / Name: Aids in the Workplace Awareness													
17	ALCALA, D M	Internal	14-Jun-2006	15-Jun-2006	2	16	0	0	No			n/a	n/a
49	ARENDS, TA	External	06-Mar-2006	07-Mar-2006	2	16	0	0	No			n/a	n/a
5	CHUNARA, H	Internal	23-Oct-2006	23-Oct-2006	1	8	0	0	No			n/a	n/a
26	DUNNE, R	External	30-Aug-1988	23-Feb-1989	126	1008	0	0	No			n/a	n/a
29	fernie, m	External	30-Aug-1988	23-Feb-1989	126	1008	0	0	No			n/a	n/a
55	FISHER, JRS	External	30-Aug-1988	23-Feb-1989	126	1008	0	0	No			n/a	n/a
48	FRITZ, DR	External	30-Aug-1988	23-Feb-1989	126	1008	0	0	No			n/a	n/a
38	MAMOGOBO, J.S	External	14-Aug-2006	14-Aug-2006	1	8	0	0	No			n/a	n/a
13	WILLOCKS, H	Internal	23-Oct-2006	24-Oct-2006	2	16	0	0	No			n/a	n/a
Total Employees for Course:		9											

- **Training Not Received Summary**

This report will display all employees that have NOT received training per training course and allow users to show which employees have not attended a particular training course. The report can be selected by training course, cost centre, department and date period. The report will be located in the Company Reports and Skills Development Reports categories.

Payroll Demo
Print Date : 21/05/2008

PSIberSTAFF

Training Not Received Summary

For Period: 21-May-2008

Employee		Employment Date	Job Grade	Job Title	Occupational Category	Occupational Level	Cost Centre	Department	Restricted
Course Code / Name: Aids in the Workplace Awareness									
0008	Banks, G	02-Oct-2006	Grade 5	General Manager	Professionals	Professionally Qualified &	Executive, 01	Management, Dep10	No
64	COLLINS, C	01-Mar-2005	Grade 4	Transport Manager	Professionals	Senior Management	Transport, 05	Drivers, Dep11 (Transport)	No
68	DANIELS, HW	01-Mar-2005	Grade 8	Supervisor	Clerks	Skilled Technical & Academically	Workshop, 03	Mechanical, Dep6	No
27	DHANPAL, M	01-Mar-2005	Grade 8	Admin Clerk	Clerks	Skilled Technical & Academically	Admin, 02	Admin, Dep3 (Admin)	No
40	DIBILONG, W.M	01-Mar-2005	Grade 13	Washbay Attendant	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Transport, 05	Maintenance, Dep13	No
45	DLAMINI, J.S	01-Mar-2005	Grade 14	Cleaner / Tea Maker	Elementary Occupations	Unskilled & Defined Decision Makers	Admin, 02	Admin, Dep3 (Admin)	No
8	DOWNIE, I	01-Mar-2005	Grade 5	General Manager	Professionals	Professionally Qualified &	Executive, 01	Management, Dep10	No
7	GERBER, A	01-Mar-2005	Grade 4	Financial Manager	Professionals	Senior Management	Executive, 01	Management, Dep10	No
P001	Gladding, G	01-Mar-2005	Grade 11	Washbay Team Leader	Elementary Occupations	Unskilled & Defined Decision Makers	Transport, 05	Maintenance, Dep13	No
74	Holmes, H	05-Apr-2006	Grade 12	Greaser	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Executive, 01	Exec, Dep8 (Executive)	No
63	JACK, MZ	01-Mar-2005	Grade 8	Mechanic	Clerks	Skilled Technical & Academically	Workshop, 03	Mechanical, Dep6	No
4	JACKSON, V A	01-Mar-2005	Grade 8	Supervisor	Clerks	Skilled Technical & Academically	Transport, 05	Drivers, Dep11 (Transport)	No
72	Janse, J	01-Apr-2001	Grade 11	Tyre Attendant	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Executive, 01	Management, Dep10	No
59	KENTANE, ZG	01-Mar-2005	Grade 12	Painter	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Workshop, 03	Maintenance, Dep5	No
75	Kernel, J	02-Jan-2007	Grade 5	Accountant	Professionals	Professionally Qualified &	Admin, 02	HR, Dep2 (Admin)	No
51	KHUMALO, W	01-Mar-2005	Grade 9	Driver Code 14	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Transport, 05	Drivers, Dep11 (Transport)	No
69	LA FLEUR, REC	01-Mar-2005	Grade 8	Panelbeater/Spraypainter	Clerks	Semi-Skilled & Discretionary	Workshop, 03	Maintenance, Dep5	No
36	LEOPE, P.L	01-Mar-2005	Grade 11	Washbay Team Leader	Elementary Occupations	Unskilled & Defined Decision Makers	Transport, 05	Maintenance, Dep13	No
58	LIWANA, S	01-Mar-2005	Grade 12	Painter	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Workshop, 03	Maintenance, Dep5	No
3	LOWTON, P	01-Mar-2005	Grade 4	HR Manager	Professionals	Senior Management	Executive, 01	Management, Dep10	No
2	MACKAY, B	01-Mar-2005	Grade 3	Financial Director	Legislators, Senior Officials and	Top Management	Executive, 01	Exec, Dep8 (Executive)	No
16	MAHLANGU, J	01-Mar-2005	Grade 7	Office Orderly	Clerks	Skilled Technical & Academically	Admin, 02	Admin, Dep3 (Admin)	No
44	MAIMELA, MS	01-Mar-2005	Grade 14	General Worker	Plant and Machine Operators and	Unskilled & Defined Decision Makers	Workshop, 03	Mechanical, Dep6	No

▪ **Employee Training Summary**

This report will display a summary of the training courses that an employee has attended. Information that will be displayed is:

- o Internal / External;
- o Start and End Date
- o Course Duration – Days and Hours (working and non-working)
- o Part of WSP – Yes or No
- o NQF Option – Recognised, Aligned or Internal
- o Employee Pass – Yes or No
- o Competent – Yes or No
- o Follow-up Required – Yes or No
- o Project / Assignment given – Yes or No
- o Certificate Issued and Type of Certificate
- o Total Expenditure (including and excluding employee time costs)
- o Contract – Yes or No

The report will be selected by employee and be located in the Skills and Training Reports category.

Payroll Demo
PSIberSTAFF
Employee Training Summary

ALCALA, D M - 17

Course Code / Name: **ME-435 - Microsoft Excel**

Course Category:		Internal / External:	External
Start Date:	30/08/1968	End Date:	23/02/1969
Course Duration: Working Days	126.00	Course Duration: Working Hours	1,008.00
Course Duration: Non-Working Days	0.00	Course Duration: Non-Working Hours	0.00
Part of WSP:	No	NQF Option:	
Qualification / Unit Standard:		Competent:	N/A
Pass:	N/A	Project / Assignment Given:	N/A
Follow-up Required:	N/A	Total Course Cost (Excl Time Costs):	1,250.00
Certificate Issued:	N/A	Certificate Type:	
Contract:	No		

Course Code / Name: **Aids in the Workplace Awareness**

Course Category:		Internal / External:	Internal
Start Date:	14/06/2006	End Date:	15/06/2006
Course Duration: Working Days	2.00	Course Duration: Working Hours	16.00
Course Duration: Non-Working Days	0.00	Course Duration: Non-Working Hours	0.00
Part of WSP:	No	NQF Option:	
Qualification / Unit Standard:		Competent:	N/A
Pass:	N/A	Project / Assignment Given:	N/A
Follow-up Required:	N/A	Total Course Cost (Excl Time Costs):	1,250.00
Certificate Issued:	N/A	Certificate Type:	
Contract:	No		

Course Code / Name: **Basic First Aid - Level 1**

Course Category:		Internal / External:	External
Start Date:	21/08/2006	End Date:	23/08/2006
Course Duration: Working Days	3.00	Course Duration: Working Hours	24.00
Course Duration: Non-Working Days	0.00	Course Duration: Non-Working Hours	0.00
Part of WSP:	No	NQF Option:	
Qualification / Unit Standard:		Competent:	N/A
Pass:	N/A	Project / Assignment Given:	N/A
Follow-up Required:	N/A	Total Course Cost (Excl Time Costs):	2,500.00
Certificate Issued:	N/A	Certificate Type:	
Contract:	No		

- **Training Course Cost Summary**

This will display the cost for each training course per employee. This report will be located in the Company Reports and Skills Development Report categories.

Tax Year: (March, 2006 - February, 2007)								Print Date: 2008/05/21 10:08:25

Payroll Demo

PSIberSTAFF (Monthly Payroll)

Training Cost Summary

	Course	Total Employee Direct Cost	Total Course Cost	Total Excl. Time Cost	Time Cost	Total Incl. Time Cost	NQF Option	Pass Course
17 - ALCALA, D M	ME-435 - Microsoft Excel	0.00	1,250.00	1,250.00	0.00	1,250.00		N/A
	Aids in the Workplace Aw	0.00	1,250.00	1,250.00	990.08	2,240.08		N/A
	Basic First Aid - Level 1	0.00	2,500.00	2,500.00	3,750.00	6,250.00		N/A
49 - ARENDS, TA	Aids in the Workplace Aw	0.00	1,000.00	1,000.00	990.08	1,990.08		N/A
0008 - Banks, G	Brilliant Customer Servic	0.00	1,000.00	1,000.00	750.00	1,750.00		N/A
19 - Brown, J	Basic First Aid - Level 2	0.00	1,120.00	1,120.00	280.00	1,400.00		N/A
5 - CHUNARA, H	Aids in the Workplace Aw	0.00	500.00	500.00	280.00	780.00		N/A
	Intermediate First Aid - L	0.00	690.00	690.00	280.00	970.00		N/A
	MS PowerPoint for Mana	0.00	1,000.00	1,000.00	560.00	1,560.00		N/A
	Project Management Bo	0.00	5,500.00	5,500.00	1,120.00	6,620.00		N/A
Total		0.00	15,810.00	15,810.00	9,000.16	24,810.16		

Number of People Trained   5.0

PAGE: 1
Copyright © : PSIberWORKS (PTY) Ltd.

- **Employee Training Restrictions**

This will display all information for any restrictions that an employee may have. This report will be located in the Employee Reports category.

Training Restrictions Summary

All Courses

Current Restrictions

Employee	Course Code / Name	Reason	Start Date	Expected End Date	Time Period	Comments		
AANewton, N - 02	Idad.T.C. Kleentex	Not Completed Project /	09/05/2008		"	"		
AANewton, N - 02	Leadership Development Programme	Not Completed Project /	09/05/2008		"	"		
Training, N - 100	ABET01 - Adult Basic Education	Disciplinary	01/05/2008	31/05/2008	Month(s) - 1	"		
Training, N - 100	Cash & Banking	Other	01/06/2008	31/07/2008	2 Months -	"		
Training, N - 200	All Courses	Misuse of Training Facilities	01/04/2008		"	'comments about the restriction on all courses go here in this comments box'		
Training, N - 300	ISO Training	Needs to Completed Course	01/01/2008	31/07/2008	"	"		

Previous Restrictions

Employee	Course Code / Name	Reason	Start Date	Expected End Date	Time Period	End Date	Reason	Authorised by	Comments
Training, N - 100	Activewhere	Misconduct	01/01/2007	31/03/2008	Month(s) - 3	01/04/2007	Restriction Period	Mr Smith	"

Employees Restricted :   4

Total Employees Restricted :   4

- **Employee Master Training Report**

This will display all information captured for training per employee. Users will be able to select the following information to be displayed:

- o Basic Course Details;
- o NQF Details;
- o Post Course Details;
- o Costing;
- o Internal Venues and Instructors;
- o External Venues and Instructors;
- o Contracts; and
- o Restrictions

Employee Training Details

Training, N - 100

Course Code / Name: :Leadership Dev

Basic Details:

Course Category	Administration	Internal / External	Internal
Start Date	22/04/2008	End Date	22/04/2008
Course Duration	Manual		
Working Days	0	Working Hours	4
Non-Working Days	0	Non-Working Hours	0
Part of WSP	No		
Comments			

Post Course Details:

Post Course Evaluation:

Course Minimum Pass Rate		Employee's Result	
Pass	Not Applicable	Re-do Course	Not Applicable
Competent	Not Applicable	Re-do By When	
Date of Assessment		Within Time Period	-
Completed Evaluation Questionnaire	Not Applicable	Course Assessment	
Instructor's Assessment of Employee			
Employee's Assessment of Training			

Follow-up Details:

Follow-up Required	Not Applicable		
Follow-up Reason		Who is to Follow-up	
By When			
Follow-up Occured	No		
Who Followed-up		Outcome	
Given Project / Assignment	Not Applicable	Comments	null

Certificate Details:

Issue Certificate	Not Applicable	Certificate Type	
Certificate Number		Issued Date	

Skills Acquired From Training:

Costing

Employee Direct Cost:

Travel Cost	0.00
Accommodation Cost	0.00
Subsistence Cost	0.00
Other Cost -	0.00
Total Employee Direct Costs	0.00

Course Cost:

- **Age Profile Report**

  This report will display the number of employee per age range in the company and can be used for SETA reporting. This report will be located in the Skills Development Reports category

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 26 of 49

Monday, November 19, 2012

Age Profile

For Training Period:
01 April 2007 - 31 March 2008

Age Distribution as at 01 April 2007			SDL No: SDL001
Age Range	MALE	FEMALE	DISABLED
Under 19	0	0	0
19 - 24	5	1	0
25 - 29	6	5	1
30 - 35	4	6	1
36 - 40	1	5	0
41 - 45	2	4	0
46 - 50	1	1	0
51 - 55	0	0	0
56 - 64	1	3	0
65 and over	0	0	0
Total	20	25	2
Grand Total (M + F)	45		

The following Training reports have been planned for future development:

- **NQF Training Summary**

  This will display all NQF information for training courses that employees have received. This report will be located in the Skills Development Reports category.

- **Employee Post-Course Details**

  This will display all post-course details captured per training course for an employee. This report will be located in the Employee Reports category.

- **Employee Issued Certificates Summary**

  This will display all certificates that have been issued to employees and can report by employee or training course(s). This report will be located in the Employee Reports category.

- **Employee Training Contracts**

  This will display all information for any training contracts that employee may have. This report will be located in the Employee Reports category.

- **Training Contract Summary**

  This will display all employees that have training contracts and for which course(s). This report will be located in the Company Reports category.

- **Training Restrictions Summary**

  This will display all employees that have training restrictions and for which course(s). This report will be located in the Company Reports category.

4. Workplace Skills Plan

The Workplace Skills Plan facility has been designed to allow you to capture the WSP Plan for the training year. A plan can be setup defining values according to three levels, namely: Occupational Category, Job Title and Training Intervention. This facility allows for multiple WSP's to be captured for comparison and scenario planning. Completion and submission details are also maintained in this facility.

Workplace Skills Plan is located in Buildsmart HR > Company Maintenance > Workplace Skills Plan
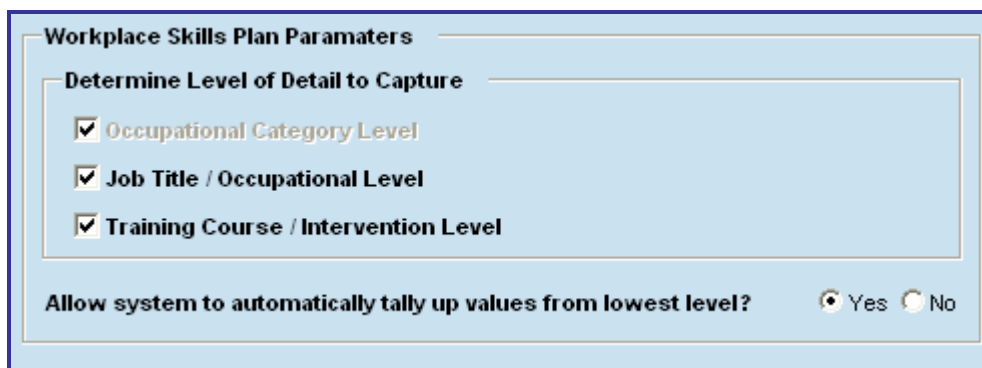
5. WSP System Parameter

A parameter has been including in the "*System Parameters"* allowing you to setup the default of how to capture your workplace skills plan. The following can be setup using the WSP Parameters:

- Determine the Level of Detail to Capture
  - Occupational Category Level;
  - Job Title / Occupational Level;
  - Training Course / Intervention Level;

- Allow system to automatically tally up values

Please Note:
If the system is set to automatically tally up values from the lowest level, as values are entered for job title / occupation and training course / intervention these will be automatically tallied up and displayed as the totals for that occupational category.

6. WSP Screens and Functionality

The following screens are included in WSP:

- WSP Details;
- WSP Setup;
- View Plans.

6.1. WSP Details

The details of the WSP are capture in this screen. The WSP is created here and then setup in the WSP Setup screen. Therefore, information must be saved in WSP Details before proceeding to WSP Setup.

The following information can be entered in this screen:

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 28 of 49

Monday, November 19, 2012

- Year;
- WSP Number;
- Description;
- Compiled By;
- Submission Due Date;
- Comments;
- Completed – Yes or No;
  - Completion Date;
  - Completed By;
  - Signed-off By;
- Submitted – Yes or No
  - Submission Date;
  - Submitted By;
  - Signed-off By;
  - Submitted To;
  - Contact Person;
  - Contact Number;
  - Contact E-mail;

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 29 of 49

Monday, November 19, 2012

| WSP Details | WSP Setup | View Plans |

Workplace Skill Plan Details

Year [▼]

Number [▼]

Description [ ]

Compiled By: [ ]

Submission Due Date: [dd] [month ▼] [yyyy] [Calendar]

Comments [ ]

[Add] [Update] [Remove] [Remove All]

Year	Number	Completed	Completion Date	Submitted	Submission Date
2009	1	No		No	
2009	3	No		No	
2008	1	No		No	
2008	2	No		No	
2009	2	Yes	23/05/2008	Yes	21/05/2008

Completed: ⦿ Yes ○ No

Completion Date [dd] [month ▼] [yyyy] [Calendar]

Completed By: [ ]

Signed-off By: [ ]

Submitted: ⦿ Yes ○ No

Submission Date: [dd] [month ▼] [yyyy] [Calendar]

Submitted By: [ ]

Signed-off By: [ ]

Submitted To: [▼]

Contact Person [ ]

Contact Number [ ]

Contact E-Mail [ ]

6.2. WSP Setup

The actual values for the WSP are setup in the WSP Setup screen. Here you can define the number of employees to be trained per Occupational Category as well as per Job Title and / or Training Course.

Please note:
Setting up numbers for Job Title / Occupation and Training Course / Intervention will depend on the parameters that have been setup in *System Parameters.* (Refer to section 5. of this overview)

The following features are included in this screen:

- o View Current Profile
  This option will display the number of employees in each ethnic group – male, female and disabled – as per Occupational Category or Job Title selected. The profile can be view as at 1 April of the current year or as at current.

- o Validate
  By Selecting Validate the system will inform you of any inconsistencies in the data defined for a plan.

- o Tally Up
  This feature will automatically tally up the values from the bottom up. I.e.: Values as defined for Job Titles will be tallied up and used in calculating totals for the Occupational Category.

- o View Plan
  View Plan will display the full plan at Occupational Category level.

WSP Details	WSP Setup	View Plans	

Select WSP...

Year	Number	Completed	Completion Date	Submitted	Submission Date
2009	1	No		No	
2009	3	No		No	
2008	1	No		No	
2008	2	No		No	
2009	2	Yes	23/05/2008	No	21/05/2008

[Update]

WSP Setup

Occupational Category	Professionals
Job Grade	
Job Title / Occupation	
Training Course / Intervention	

Professionals

African			Coloured			Indian / Asian			White			Total		
M	F	D	M	F	D	M	F	D	M	F	D	M	F	D
3	3	3	2	2	2	3	3			1	4	8	9	9

[View Current Profile]   ⦿ As at 1 April 2008   ◯ To Current Date < 2008-05-26 >

[New Occ. Category] [New Job Title] [New Course] [Update] [Remove] [Remove All]

Occupational Category	Occupation / Job Title	Training Course / Intervention	M	F	D
Legislators, Senior Officials an...			2	1	1
Professionals			8	9	9
	B4 - Bookkeeper		6	4	3
	D4 - Group Financial Manager		2	5	6

Total			10	10	10
Grand Total (M + F)				20	

[Tally Up] [Validate] [View Plan]

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 32 of 49

Monday, November 19, 2012

6.3. View Plans

On this screen you can view all plans that have been captured, whether completed or still in the process of being setup.

WSP Details	WSP Setup	View Plans	....

Select Workplace Skills Plan

Filter by

- ● All Plans
- ○ Year [▼]
- ○ Submitted Only

Select WSP...

Year	Number	Completed	Completion Date	Submitted	Submission Date
2009	1	No		No	
2009	3	No		No	
2008	1	No		No	
2008	2	No		No	
2009	2	Yes	23/05/2008	No	21/05/2008

Year: 2009

Number: 3   **Description:** description 2009 3

Compiled By: compiled by 2009 3   **Submission Due Date:** 28/06/2008

Comments comments 2009 3

Occupational Category	African			Coloured			Indian / Asian			White			Total		
	M	F	D	M	F	D	M	F	D	M	F	D	M	F	D
Elementary Occupations															
Plant and Machine Operators and															
Craft and related Trade Workers															
Skilled Agricultural and Fishery Workers															
Service and Sales Workers															
Clerks															
Technicians and Associate															
Professionals	3	3	3	2	2	2	3	3			1	4	8	9	9
Legislators, Senior Officials and Managers	1	1	1	1									2	1	1
Total	4	4	4	3	2	2	3	3			1	4	10	10	10
Grand Total (M + F)													20		

Completed: No

Completion Date: **Completed By:**   **Signed-off By:**

Submitted: No

Submission Date: **Submitted By:**   **Signed-off By:**

Print

7. WSP Reports

- WSP Report
  The WSP Report will display the WSP as setup according to Occupational Category, Job Title / Occupation and / or Training Course / Intervention.

	African			Coloured			Asian/Indian			White			Total		
Occupational Categories > Job Title > Training Courses	M	F	D	M	F	D	M	F	D	M	F	D	M	F	D
Legislators, Senior Officials & Managers	5	2	1												
Job Title	3	2	0												
Training Course	2	2	0												
Training Course	1	0	0												
Job Title	2	0	1												
Training Course	1	0	1												
Training Course	1	0	0												
Professionals															
Job Title															
Training Course															
Job Title															
Training Course															
Total															
Grand Total (M + F)															

Workplace Skills Plan — SDL No: L890790-0

- Annual Training Received Report (ATR)
  This report will display the number of employees who have actually received training in a specified period and will also display what was planned according to the WSP.

Annual Training by Occupational Category (Excluding Occupations) — SDL No: SDL001

Occupational Categories	Number of Employees Trained During Period: 01 April 2007 - 31 March 2008	African			Coloured			Asian/Indian			White			Total		
		M	F	D	M	F	D	M	F	D	M	F	D	M	F	D
Elementary Occupations	Planned (as per WSP)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual	7	14	0	0	1	0	0	0	0	0	0	0	7	15	0
Plant and Machine Operators and Assemblers	Planned (as per WSP)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual	9	2	0	0	0	0	0	0	0	0	0	0	9	2	0
Service and Sales Workers	Planned (as per WSP)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual	0	0	0	0	0	0	0	0	0	0	3	0	0	3	0
Clerks	Planned (as per WSP)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual	0	3	1	0	1	0	1	1	0	3	6	1	4	11	2
Legislators, Senior Officials and Managers	Planned (as per WSP)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual	2	1	0	0	0	0	0	1	0	0	1	0	2	3	0
Total	Planned	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Actual	18	20	1	0	2	0	1	2	0	3	10	1	22	34	2
Grand Total (M + F)	Planned													0		
	Actual													56		

8. Development Need and Plans

The Development Plans function within Buildsmart HR allows users to capture and maintain information related to development needs and development plans for employee.

The facility is located in Buildsmart HR > Education, Training & Skills > Development Plans.

- Identified Needs
- Resolved Needs
- Company Development Plans
- Personal Development Plans
- Summary;

These are further explained as follows:

8.1. Identified Needs

The "Identified Needs" screen allows for the capture of the development needs that an employee my have. The needs can be identified has being personal or company related and the recommend action to be taken to resolved the need can be captured. Such information includes:

- Need Description and Type;
- Reason for and the Source of the Need;
- Date Identified and Date / Time Period to be Addressed by
- Priority The course Start Date and End Date;
- Recommended Actions to Resolved the Need :
    o Training Courses – put on waiting list, priority and preferred date;
    o Development Plans – company or personal;
    o Other Actions – job rotation, attend conference etc;
- Any Comments regarding the need.

Identified Needs are displaying in the following colours according to their status for quick identification:

- Black   = Resolved
- Blue   = Unresolved

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 35 of 49

Monday, November 19, 2012

Identified Needs	Resolved Needs	Company Dev. Plans
Personal Dev. Plans	Summary	

Development Need Details

Need

Need Type

Reason

Source of the Need

Contact Person

Company / Personal   ● Company   ○ Personal

Date Identified   dd   month ▼   yyyy   Calendar

To be Addressed By   dd   month ▼   yyyy   Calendar

To be Addressed within   ▼

Priority / Urgency   ▼

Recommended Actions

Training	Dev. Plans	Other Actions

Training Courses

Course Code / Name   ▼

Course Category   ▼

By When   dd   month ▼   yyyy   Calendar

Put on Waiting List   ☐

Preferred Date   dd   month ▼   yyyy   Calendar

Request by

Priority   ▼

Add	Update	Remove	Remove All

Training Course Summary

Course Code / Na...	Course Category	By When	Waiting List

Employee Training Details

Quick View Buttons

When capturing recommend actions, information regarding employee planned and completed training, and development plans can be viewed by clicking on the relevant button located on screen

8.2. Resolved Needs

The "Resolved Needs" screen allows users mark Identified Needs as resolved or not resolved and capture the resolution actions if resolved. Such information includes:

- Whether the need is resolved or not and if not then
  - Reason not Resolved

  And if resolved then
  - Date Resolved;
  - Resolution Actions"
    - Training Courses – date completed, cost, pass rate
    - Development plans – company / personal, date completed, cost
    - Other Actions – date, time period and cost

| Identified Needs | Resolved Needs | Company Dev. Plans |
| Personal Dev. Plans | Summary | |

Select a Need

Need	Need Type	Date Identified	Company / Per...	Resolved
IDE1 Need	Administrative	11/02/2009	Company	No
IDE2 Need	Behavioural	21/02/2009	Personal	Yes

Clear All   Update

Resolution Details

Resolved   ○ Not Yet ● Yes ○ No

Resolution Date   2   March ▼ 2009   Calendar
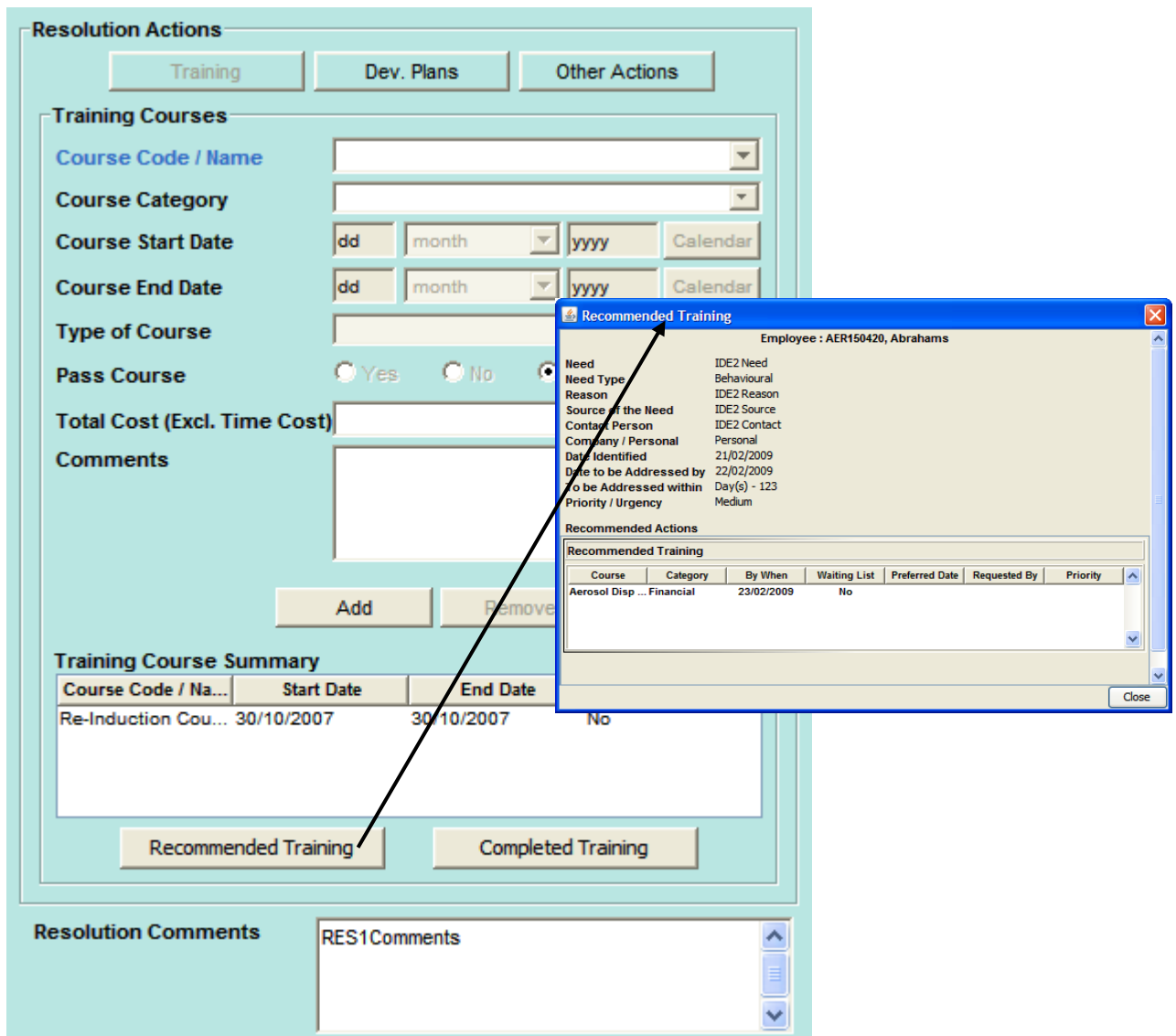
8.3. Development Plans

The "Company and Personal Development Plans" screens allow users to capture and track development plans that an employee is on. Such Information includes:

- Development Plan Category and Code / Description
- Development Plan Purpose;
- Expected and Estimated Time to Complete
- Estimated Cost to Complete
- Development Plan Content
  - Training Courses;
  - Experiences
  - Other Actions
- Identified Needs to be Addressed through the development plan
  - Company related needs
  - Personal related need
- Development Plan Status
  - Not Started

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 39 of 49

Monday, November 19, 2012

- Anticipated Start and End Date

  o Started
    - Actual Start Date
  o Completed
    - Actual Completion Date
    - Confirmed By
    - Actual Cost to Complete
  o Stopped
    - Date Stopped
    - Reason Stopped
    - Cost To Date
    - Authorised By

Development Plans are displaying in the following colours according to their status for quick identification:

- Blue = Started
- Red = Outstanding
- Black = Completed
- Green = Stopped

Quick View Buttons

When development plans, information regarding employee's training, experiences and identified needs can be viewed by clicking on the relevant buttons located on screen.

Buildsmart HR Administration (Basic) - Training and Development Records Overvieword Overview.

Page 40 of 49

Monday, November 19, 2012

![build smart — your total hr solution...]

Company Development Plans

Development Plan Code / Description	[dropdown]
Development Plan Category	[dropdown]
Purpose	[text area]
Time to be Completed in :	[dropdown] [text field]
Estimated Time to Complete :	[dropdown] [text field]
Estimated Cost to Complete :	[text field]

Tabs: Identified Needs | Resolved Needs | Company Dev. Plans | Personal Dev. Plans | Summary

Development Plan Contents

Training | Experience | Other Actions

Training Courses

Course Code / Name	[dropdown]
Course Category	[dropdown]
Course Duration	[dropdown] [text field]
Minimum Pass Rate	[dropdown]
Course Cost	[text field]

Add | Update | Remove | Remove All

Training Course Summary

Course Code / Name	Course Category	Duration

Employee Training Details

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 41 of 49

Monday, November 19, 2012

Needs Addressed through this plan

Company / Personal   ⦿ Company   ○ Personal

Need Type

Development Need

[Add]   [Remove]   [Remove All]

Development Need Summary

Need	Need Type	Date Identified	Company / Per...	Resolved

[View Employee Needs]   [View Need Details]

Employee Development Needs

Employee : AER150420, Abrahams

Need	Need Type	Company Personal	Date Identified	To be Addresse...	To be Addresse...	Priority/ Urgency	Resolved
IDE1 Need	Administrati...	Company	11/02/2009	17/02/2009	Day(s) - 31	Low - 31	No
IDE2 Need	Behavioural	Personal	21/02/2009	22/02/2009	Day(s) - 123	Medium - 123	Yes

[Close]

Development Plan Status

Status	Stopped			▼
Anticipated Start Date	dd	month ▼	yyyy	Calendar
Anticipated End Date	dd	month ▼	yyyy	Calendar
Anticipated Duration	▼			
Actual Start Date	dd	month ▼	yyyy	Calendar
Actual Completion Date	dd	month ▼	yyyy	Calendar
Actual Time to Complete	▼			
Confirmed By				
Actual Cost to Complete				
Date Stopped	dd	month ▼	yyyy	Calendar
Reason				▼
Cost to Date				
Authorised By				

Comments

Add | Update | Remove | Remove All

Company Development Plans Summary

Development Plan	Category	Status	Started Date
Exec : Executive De...	Construction	Not Started	
Prgm : General Pro...	Accounting and Fin...	Started	04/05/2009
Supt : Support and ...		Completed	07/05/2008

8.4. Summary

The "Summary" screen allows users to view a summary of an employee's Identified Needs and Development Plans. Users can select to view an employee's training by:

The following statistics can be viewed:

- Identified Needs (Company and Personal)
  - Number of Needs Captured:
  - Number of Needs Resolved
  - Number of Needs Unresolved
- Development Plans (Company and Personal)
  - Number of Development Plan Captured;
  - Number of Development Plan Not Started
  - Number of Development Plan Started
  - Number of Development Plan Outstanding
  - Number of Development Plan Completed
  - Number of Development Plan Stopped

Further information about identified needs and development plan can be viewed by clicking on the relevant Quick View buttons located on the screen.

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 44 of 49

Monday, November 19, 2012

Development Plans

Development Plan	Prgm : General Programming Management
Company / Personal	Personal
Anticipated Duration	Day(s) - 24
Actual Start Date	20/04/2009
Anticipated End Date	27/02/2009
Actual End Date	

View Development Plan

Development Plan	Company / Personal	Status
Exec : Executive Develop...	Company	Not Started
Prgm : General Programm...	Personal	Stopped
Midl Mngt : Middle Mana...	Personal	Started
Supt : Support and Call C...	Personal	Started
Prgm : General Programm...	Company	Started
Supt : Support and Call C...	Company	Completed

	Company	Personal	Total
Number of Development Plans Defined	3	3	6
Not Started	1	0	1
Started	1	2	3
Completed	1	0	1
Stopped	0	1	1
Outstanding	0	0	0

Employee Plan Details

Employee : AER150420, Abrahams

Development Plan Code / Description	Prgm : General Programming Management
Development Plan Category	Engineering
Purpose	PER1
Time to be Completed in	6 Months - 0
Estimated Time to Complete	6 Months - 0
Estimated Cost to Complete	2,342.00

Development Plan Content

Training Courses

Course	Category	Duration	Minimum Pass Rate	Cost
Activewhere	Financial	6 Months - 344	0.6 : 60 Percent	555.00

Experiences

Experience	Category	Purpose	Duration	Cost
PBR : Business Pro...	Financial	3525225	6 Months - 525	252,535.00

Other Actions

Action	Description	Time Period	Cost
Counselling	52245	3 Months - 0	2,244.00

Needs Addressed Through This Plan

Need	Need Type	Company / Personal	Resolved

Close

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 45 of 49

Monday, November 19, 2012

9. Development Needs and Plan Reports

The following Development reports are available:

- **Employee Development Needs Details**

  This will display all information captured for development needs per employee.

Employee Development Needs Details

Abrahams, PER1V - AER150420

Need	IDE2 Need		
Need Type	Behavioural	Reason	IDE2 Reason
Source of the Need	IDE2 Source	Contact Person	IDE2 Contact
Company / Personal	Personal		
Date Identified	21/02/2009	Date to be Addressed By	22/02/2009
Period to be Addressed Within	Day(s) - 123	Priority	Medium

Recommended Actions

Training

Course Name	Course Category	By When	Put on Waiting List	Preferred Date	Requested By	Priority
Aerosol Disp Cormatic Mystique	Financial	23/02/2009	No			

Development Plans

Company / Personal	Development Plan Description	Development Plan Category	By When
Personal	Supt : Support and Call Centre exposure	Human Resources	26/02/2009

Other Actions

Action	Description	By When	Time Period
Exhibitions	IDE2 Description	28/02/2009	Minute(s) - 12

Resolved	Yes
Reason for Not Resolved	
Resolution Date	02/03/2009

Resolution Actions

Training

Course Name	Course Category	Start	End	Type of Course	Pass	Competent	Comments
Re-Induction Course	Information Technology	30/10/2007	30/10/2007	Articles	No	No	Comments

Development Plans

Development Plan Description	Development Plan Category	Company / Personal	Comments

Other Actions

Action	Description	From Date	To Date	Person Responsible	Comments

Resolution Comments	RES1 Comments

Employee Development Needs Summary	Company	Personal	Total
Number of Development Needs Captured	1	1	2
Number of Development Needs Unresolved	1	0	1
Number of Development Needs Resolved	0	1	1

Buildsmart HR Administration (Basic) - Training and Development Records Overvieword Overview.

Page 46 of 49

Monday, November 19, 2012

- **Employee Development Plan Details**

This will display all information captured for development plans per employee.

Employee Development Plan Details

Abrahams, PER1V - AER150420

Development Plan	Prgm : General Programming Management
Development Plan Category	Engineering **Purpose** PER1
Company / Personal	Personal

Development Plan Planned Content

Training

Course Name	Course Category	Duration	Minimum Pass Rate	Cost
Activewhere	Financial	6 Months - 344	0.6 : 60 Percent	555.00

Experiences

Experience Description	Experience Category	Purpose	Duration	Cost
PBR : Business Process Engineering Financial		3525225	6 Months - 525	252,535.00

Other Actions

Action	Description	Time Period	Cost
Counselling	52245	3 Months - 0	2,244.00

Development Needs to be Addressed through this Development Plan

Need	Type	Company	Date Identified	Resolved
IDE2 Need	Behavioural	Personal	21/02/2009	Yes

Time to be Completed in	6 Months - 0		
Estimated Time to Complete	6 Months - 0	**Estimated Cost to Complete**	2,342.00

Status	Stopped		
Anticipated Start Date	03/02/2009	**Anticipated End Date**	27/02/2009
Anticipated Duration	Day(s) - 24		
Actual Start Date	20/04/2009	**Actual Completed Date**	
Actual Time to Complete	- 0	**Actual Cost to Complete**	0.00
Confirmation by Whom			
Date Stopped	30/04/2009	**Reason**	Employee Promoted
Cost to Date	0.00	**Authorised by**	test
Comments	PER1		

Difference between Estimated Cost & Cost to Date : 2,342.00

■ **Development Needs Summary**

This will display all employees according that have resolved and unresolved needs.

Development Needs Summary

Extraction Criteria	Report By	Company / Personal	Resolved / Unresolved	Need Type	Date Identified	Date to be Addressed By	Resolution Date	
Selected Criteria	Cost Centre	All	All		To Current	Selected Period	Selected Period	
From								
To								

Aeroport (Aeroport)
  Company
    Unresolved
      Adult Basic Education & Training

Employee	Need	Need Type	Company / Personal	Date Identified	To be Addressed By	To be Addressed Within	Priority	Resolved	Resolution Date
Allcock, MF - 00723	test	Adult Basic Education & Training	Company	14/04/2009		- 0		Not Yet	

      Total for Adult Basic Education & Training : 1

    Total Number Unresolved : 1

  Total Number of Company :1

Total Number for Aeroport (Aeroport) : 1

Cost centre 1 (1)
  Company
    Unresolved
      Administrative

Employee	Need	Need Type	Company / Personal	Date Identified	To be Addressed By	To be Addressed Within	Priority	Resolved	Resolution Date
Abrahams, PER1V - AER150420	IDE 1 Need	Administrative	Company	11/02/2009	17/02/2009	Day(s) - 31	Low	No	

      Total for Administrative : 1

    Total Number Unresolved : 1

  Total Number of Company :1

■ **Development Plan Summary**

This will display all employees per development plan and status i.e. all employees that have started a particular development plan.

Development Plans Summary

Extraction Criteria	Report By	Company / Personal	Status	Code / Description	
Selected Criteria	Cost Centre	All			
From					
To					

Company
  Status : Completed
    Exec : Executive Development - intro level

Employee	Development Plan	Category	Company / Personal	Anticipated Start Date	End Date	Duration	Status	Actual Start Date	Actual Completed
Begg, PS - AER002	Exec : Executive Development - intro	Accounting and Finance	Company	02/02/2009	23/02/2009	2 Months - 2	Completed	03/02/2009	27/02/2009

    Total for Exec : Executive Development - intro level : 1

  Total Number Completed : 1

  Status : Not Started
    Exec : Executive Development - intro level

Employee	Development Plan	Category	Company / Personal	Anticipated Start Date	End Date	Duration	Status	Actual Start Date	Actual Completed
Abrahams, PER1V - AER150420	Exec : Executive Development - intro	Construction	Company	10/06/2009	30/06/2009	3 Months - 0	Not Started		

    Total for Exec : Executive Development - intro level : 1

  Total Number Not Started : 1

END OF DOCUMENT

Buildsmart HR Basic
Training & Development Records Overview

Version 14.04.00

Buildsmart HR Administration (Basic) -
Training and Development Records
Overvieword Overview.

Page 49 of 49

Monday, November 19, 2012