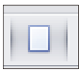
Employee Management - Employee
Training Transactions

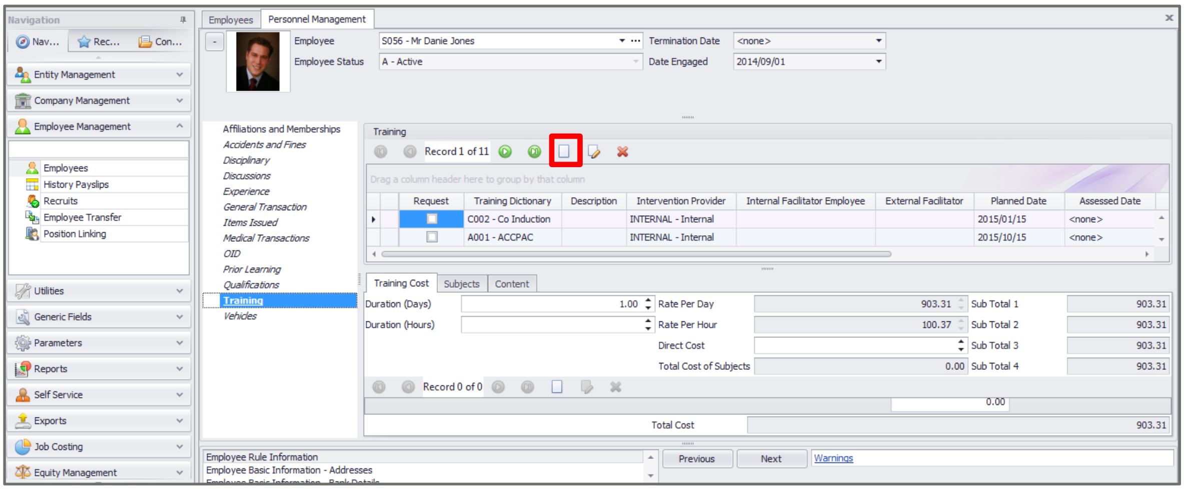
Training transactions entered on employee records will populate the Skills Development report containing the information to be submitted to the SETA.

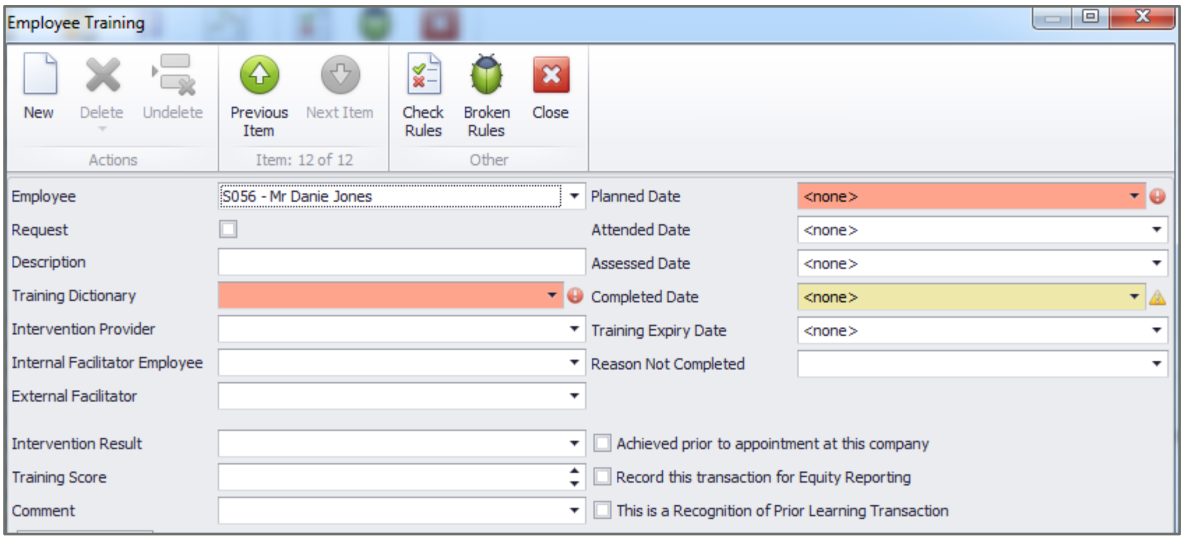
Planned training transactions have to be converted to Attended training transactions in order to compile the Annual Training report (ATR).

On the Navigation pane:

Expand	**Employee Management**
Double click on	**Employees**
Select	the applicable employee
Click on	**Personnel Management**
Click on	**Training**

Click on the  button to load a new transaction.





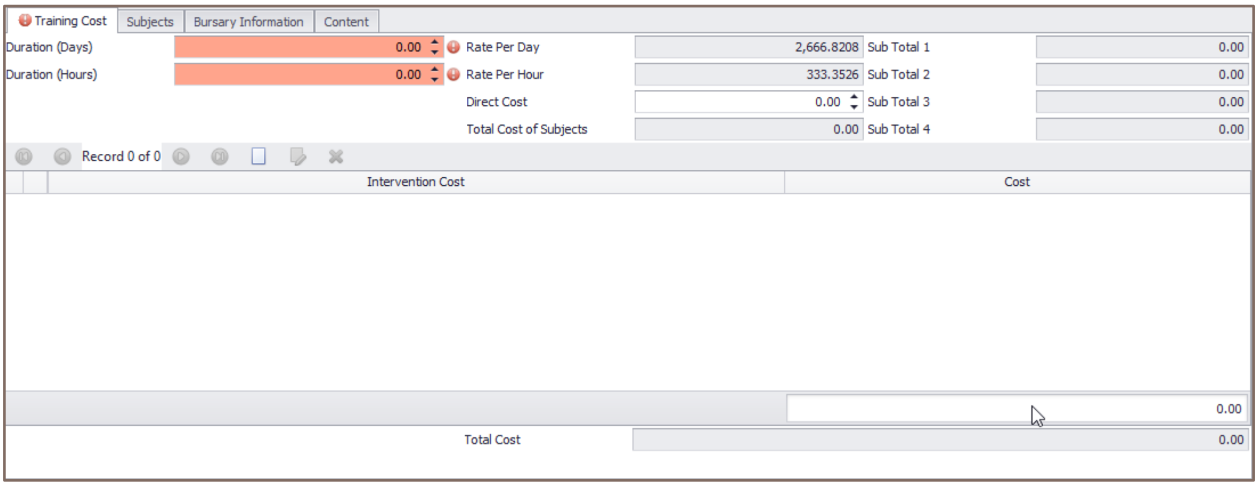
Fields on this screen.

Field	Description
Employee	The information in this field will default to the employee whom this training is being added.
Request	This field will automatically be selected if an employee made a request for training in Web SS. This filed indicates that the employee requested the training. The Request filed can be selected manually by a user on the Sage 300 People system if they do not have Web SS and want to use this filed.
Description	This field is used in Web SS. If the training is request from an employee on Web SS the employee will indicate on Web SS what training they are requesting.
Training Dictionary	Select the applicable training course planned for or attended by the employee.
Intervention Provider	The provider details will default from the selected training dictionary code, but may be changed here.
Internal Facilitator Employee	A list of employees who have been flagged as internal facilitators on the employees Skills Information screen will be displayed.
External Facilitator	Select the relevant external facilitator from the drop – down menu (if applicable)
Intervention Result	Select the result achieved by the employee. The user can either enter the result, the training score or both the result and the training score.
Training Score	Enter the score achieved by the employee ***No decimal values can be selected.***
Comment	Any additional comment may be added in this filed.
Planned Date	Enter the date for which the training is planned. **The planned date will be used to generate the WSP report.**
Attended Date	Enter the date the employee attended the training.
Assessed Date	Enter the date on which the employee was assessed for the training
Completed Date	Enter the date the employee completed the training **This date will be used to generate the ATR report.**
Training Expiry date	This field allows you to indicate when the validity for this training transaction will expire.

	Typically, this filed is used where statutory/compliance training is captured, for example, Fire Fighting, First aid, and so on.
Reason Not Completed	If the employee did not complete the intervention, Select the applicable reason. This may be used as a management tool to monitor trends. **Do not enter a complete date in this case.**
Achieved Prior to appointment at this company	Tick this box if the employee attended or completed the training before his/her appointment at this company. This will allow you to distinguish between CV information after the appointment at the company.
Record this transaction for Equity reporting	Tick this box if this transaction must be included when the Equity training report is printed.
This is a Recognition of Prior Learning Transaction	Tick this box if this transaction was recorded for recognition for Prior Learning.

Training Cost Tab

This section allows you to record the cost incurred in respect of the training.



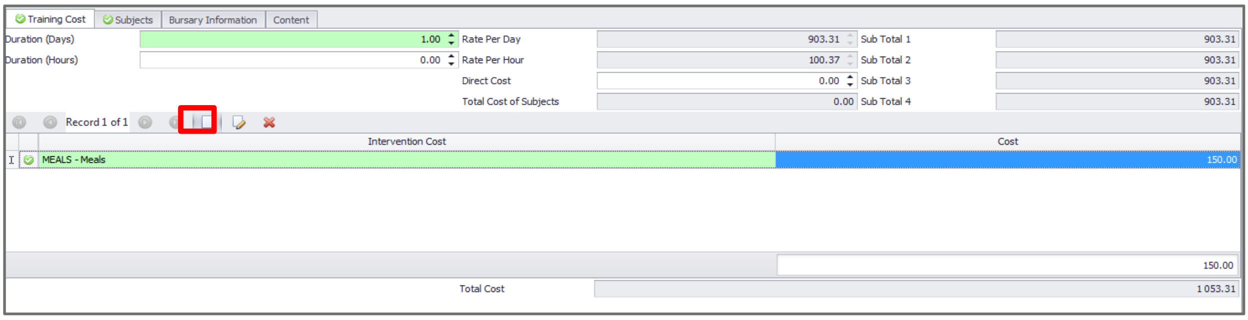
Fields on the Training Cost Tab

Field	Description
Duration (Days) **Duration (Hours)**	Enter the duration of the training by entering the number of days and /or hours the employee will attend the intervention. The days and hours will be used with the employee’s rate per day to calculate the Sub Total 1 and Sub Total 2 values of the training cost. The hours are relevant to calculate the actual cost of the training accurately s well as the loss of production from employees attending training during office hours.
Rate per Day	This field displays the employee’s rate per day as entered on the Employees Details screen. This is

	used with the duration in days to calculate Sub Total 1.
Rate per Hour	This field will default from the direct cost entered for the training dictionary. This filed may be changed.
Direct Cost	This field will default from the direct cost entered for the training dictionary. Tjis filed may be changed.
Total Cost of Subjects	This field will display the total cost of all the subjects. This is only used if the cost of each subject is added to the direct cost of the training workshop. If the individual costs of the subjects are included in the Direct cost of the training then this filed should not be used.
Sub Total 1	Sub Total 1 is calculated by multiplying the Duration (Days) with the rate per day.
Sub Total 2	Sub Total 2 is calculated by multiplying the duration (Hours) with the rate per hour and then adding that total with Sub Total 1
Sub Total 3	Sub Total 3 is calculated by adding Sub Total 1, Sub Total 2 and the direct cost.
Sub Total 4	

Additional Cost

Click on the new button to add additional cost.

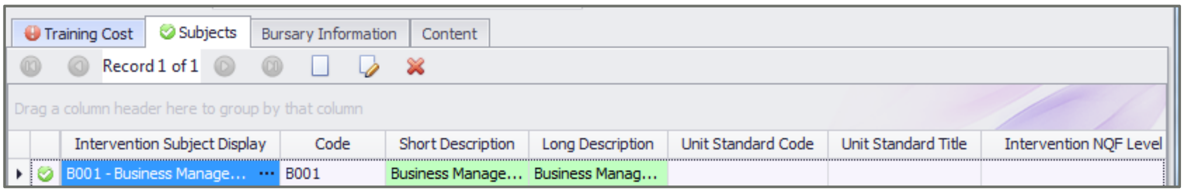


Fields on this sceen

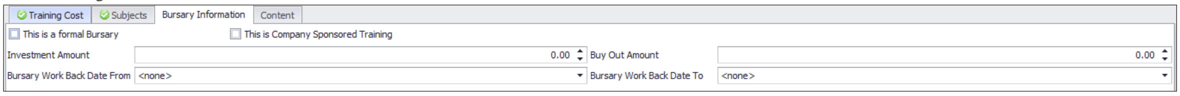
Field	Description
Intervention Cost	Select the applicable cost from the drop_down list.
Cost	Enter the amount for the additional cost.
Total Cost	This field will display the total cost of the sub totals 1, 2, 3 ,4 and the additional cost.

Subjects Tab

Any number of subjects may be linked to a training transaction. The subjects linked to the Training Dictionary Code will default to the transaction when the transaction is added for the first time. The user may add, edit or remove any of the subjects which defaulted from the code.



Bursary Information



Fields on this Screen.

Field	Description
This is a formal Bursary	This flag is used to record a formal bursary and is generally used in Qualification transactions. A bursary is a monetary award made by an institution to an individual to assist the development of their education. Generally, an employee will be contracted to the employer for work back period when such a bursary is awarded. The work back period is normally associated with a **Period longer than one year.** In most cases, the employee is given a bursary prior to their permanent employment and works back the investment when they start formal employment.
This is company sponsored training	This flag is used when a company pays for on-going training and development of an employee. The flag will only be used when a loan type agreement in respect of training is signed by an employee. In such an agreement, the employee agrees he/she is not planning to resign in the immediate foreseen future, and if he/she do resign, he/she will agree to pay back the training amount. **This agreement is normally associated with a couple of months/weeks (less than a year).**
Investment Amount	Enter the amount of invested for the training. This is the initial amount the company expect the employee to pay back, should the employee leave before his/her contract completed.
Buy Out Amount	Enter the amount the employee must pay back if he/she resigns before the date agreed for bursary. This is the actual buyout amount. The investment amount could be more or less than the buyout amount. The buyout amount will also reduce with time.
Bursary work Back date from and Bursary work back date to	Enter the From and to dates of the 'work back' period that the employee agreed.

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Content

This section allows the user to attach documents for the applicable intervention transaction.