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## Training Database Instructions

The training database is used to maintain records of employee training, education, skills, and experience. It also contains job descriptions including employee responsibilities and authorities.



From the main screen you can access all of the options in the database. Listed below is a summary the button functions. For detailed information about each button, see the corresponding sections in this document.

**Setup Employee Information** – Add or edit employee information, assign job titles, etc.

**Setup Job Information** – Add or edit job title information. This includes responsibilities and authorities as well as required training, education, certificates, skills, and experience.

**Custom Information Setup** – Customize company information and lists for pull-down menus within the database.

**Employee Training Report** – Create a report for individual employees or all employees showing training, education, skills, and experience contained in the database.

**Create Custom Reports** – Open the Report Wizard to create your own custom reports.

**Setup Training Classes** – Add or edit information about job-specific training.

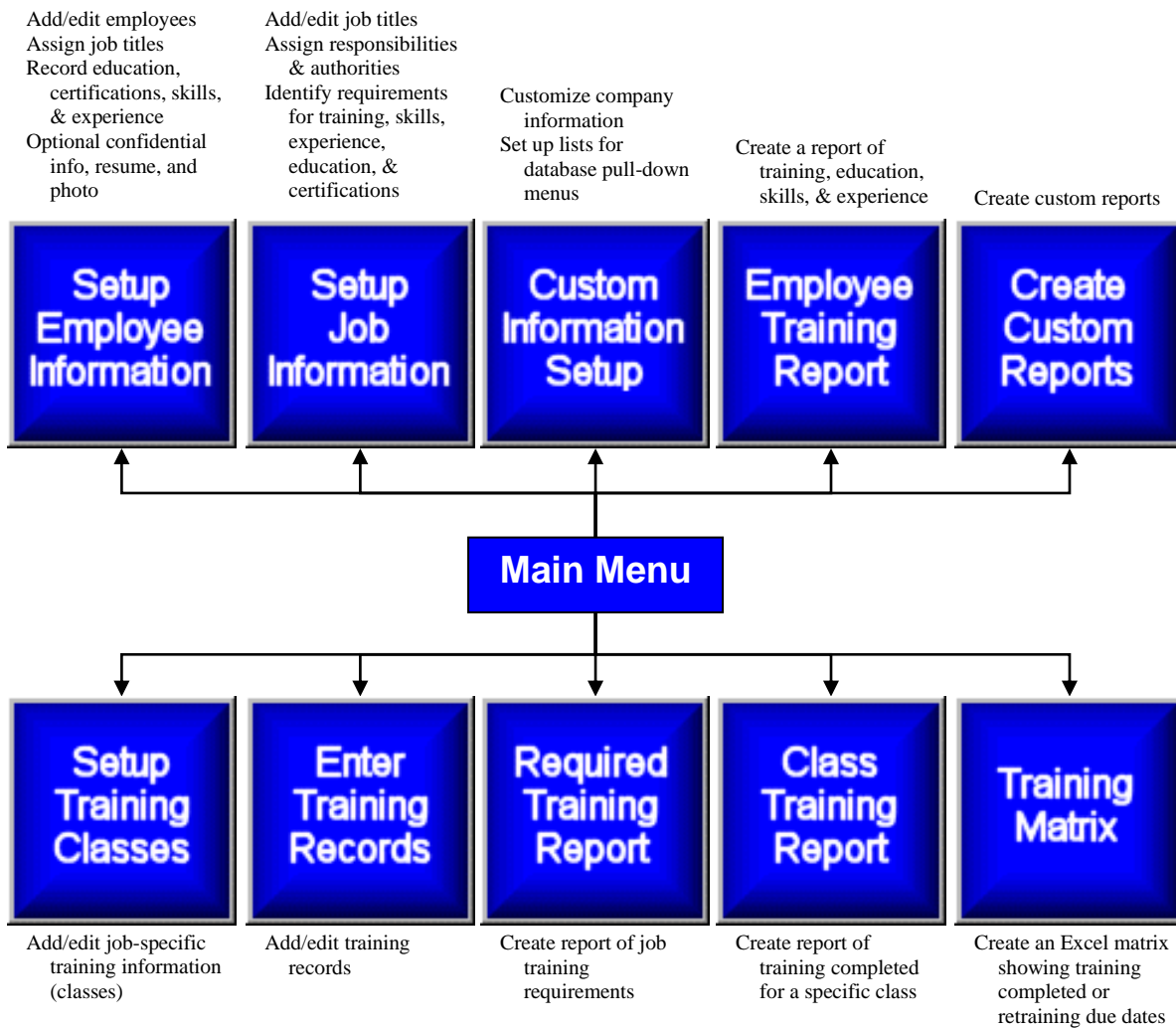
**Enter Training Records** – Add records of training that has taken place.

**Required Training Report** – Create a report showing training requirements for job titles.

**Class Training Report** – Create a report listing which employees have completed training in specific training classes.

**Training Matrix** – Create a matrix showing training that has taken place within individual departments or within the whole organization. Can also create a matrix showing due dates of retraining that is completed on a periodic basis.

## Training Database Menu Tree



## 1. Setup employee information

The screenshot shows a software window titled "Employee Information" with a blue header bar. Below the header are four tabs: "General Info", "Confidential Info", "Resume", and "Photo". The "General Info" tab is active. The main content area has a blue background and a white box at the top containing the text "Employee Background Information". Below this, there are several input fields and buttons. The "Last Name" field contains "Sample", and the "First Name" field contains "Employee". To the right of these fields are three icons: a group of people, a "New Record" button, and a document icon. Below the first name field is the "Emp #" field with "SAM991" and a "Shift" dropdown menu set to "1". There is an "Inactive?" checkbox which is unchecked. To the right of these fields is a "Setup Job Requirements" button. Below the "Emp #" field is the "Job Title" dropdown menu, which is set to "Strap Sewing". To the right of the "Job Title" field is a "Job Requirements" button. Below the "Job Title" field are three sections: "Education/ Diplomas", "Certificates/ Certifications", and "Experience/ Skills". Each section has a "Record Location" dropdown menu. The "Experience/ Skills" section is currently selected, showing "5 years experience working in manufacturing" in the dropdown. To the right of the "Experience/ Skills" section is a box containing the following text: "Machine operation helpful but not mandatory. Working in a manufacturing environment also helpful. Good hand and eye coordination and manual dexterity. General writing and communication skills." At the bottom of the window, there is a "Record:" label followed by navigation buttons and the text "266 of 266".

On the Employee Information screen, enter the employee's name and employee number. The employee number is required, as this is what the database uses to link the employees to their job title, records, and other information.

Enter the employee's job title. This must be selected from the pull-down list. If the job title doesn't exist in the database yet, you can create a new job title by clicking on the Setup Job Requirements button. See the Setup Job Information section for details.

After a job title is selected, any requirements for education, certifications, skills, and experience will automatically appear in the box(es) on the right. You need to fill in how the employee meets the requirements in the corresponding box(es) on the left.

There are three other tabs on this form that may be used to enter additional employee information, if desired. The Confidential Info tab can be used to enter information such as social security number, address, phone numbers, email, etc. The résumé tab can be used to attach an employee résumé. The Photo tab can be used to attach an employee photo.

If an employee leaves the organization, the Inactive field can be checked. This will allow you to keep the employee's records intact

## 2. Setup Job Information

The screenshot shows the 'Job Title Setup' window with the 'Job Title' tab selected. The 'Job Title' field contains 'Strap Sewing'. The 'Resp. & Auth.' tab is active, displaying two sections: 'Job Responsibilities' and 'Job Authorities'. The 'Job Responsibilities' section lists six items: 'Set-up & operate machines (sewing machine)', 'Follow written and verbal work instructions', 'Identify raw materials per unique goggle models', 'Identify constructed parts in various stages', 'Identify and sort left and right parts', and 'Complete required paperwork regarding completed job assignments'. The 'Job Authorities' section lists one item: 'Identify nonconforming product'. The bottom status bar shows 'Record: 1 of 42'.

Job Title
Strap Sewing

Job Responsibilities
Set-up & operate machines (sewing machine)
Follow written and verbal work instructions
Identify raw materials per unique goggle models
Identify constructed parts in various stages
Identify and sort left and right parts
Complete required paperwork regarding completed job assignments
Ensure quality of the finished product

Job Authorities
Identify nonconforming product

On the Job Title Setup screen, enter the job title. There are three tabs on this form containing fields to be filled out for the job position.

The first tab contains fields for job responsibilities and authorities. Responsibilities are items that employees in this position are expected to do. Authorities are things that the employee is allowed to do. Some examples of authorities are the authority to sign contracts, to stop production if nonconforming product is being made, or to disposition nonconforming product.

The screenshot shows the 'Job Title Setup' window with the 'Education, Certs, Experience' tab selected. The 'Job Title' field contains 'Assembler - Inspector'. The 'Education, Certs, Experience' tab is active, displaying three sections: 'Required Education/ Diplomas', 'Required Certificates/ Certifications', and 'Required Experience/ Skills'. The 'Required Education/ Diplomas' and 'Required Certificates/ Certifications' sections are empty. The 'Required Experience/ Skills' section lists three items: 'Good hand and eye coordination and manual dexterity', 'General writing and communication skills', and 'Working in a manufacturing environment also helpful'. The bottom status bar shows 'Record: 1 of 42'.

Job Title
Assembler - Inspector

Required Education/ Diplomas

Required Certificates/ Certifications

Required Experience/ Skills
Good hand and eye coordination and manual dexterity
General writing and communication skills
Working in a manufacturing environment also helpful

The second tab contains fields for required education, certifications, skills, and experience. Education can be high school diploma/GED, vocational school, degrees, etc. Certifications can be things like forklift license, welding certificate, auditing certification, etc. Skills can be any tasks that the job position requires proficiency in. Experience can be listed by number of years in a position, related industry, etc.

The screenshot shows a software window titled "Job Title Setup". At the top, there is a "Job Title" section with a "New Record" button and a text field containing "Strap Sewing". Below this are three tabs: "Resp. & Auth.", "Education, Certs, Experience", and "Required Training". The "Required Training" tab is active, displaying a table of training classes. The table has three columns: a selection box (with a down arrow), a numeric code field, and a description. The first four rows are populated with data, and the fifth row is a new record being added, indicated by an asterisk in the selection box. The bottom of the window shows a record navigation bar with "Record: 35 of 42" and various navigation icons.

Selection	Code	Description
751310	000	Standard strap assembly for slide & clip buckles
751320	000	Standard sewing procedures for sewing slide buckles, clip buckles, ends, Ve
751330	000	Standard strap assembly to goggle frames
751800	000	Safety
*		

The third tab allows you to add required training classes for the job position. These can be selected by clicking on the down-arrow in the left box and selecting from the list of classes that have been entered. If no classes exist, they can be added by selecting Setup Training Classes from the main menu. See the Setup Training Classes section of this document. Required training may also be added to the job title from the training class information screen (see the Setup Training Classes section of this document).

### 3. Setup Training Classes

**Training Class Information**

Class Number: 751320 Rev: 000

Training Class Title:  
Standard sewing procedures for sewing slide buckles, clip buckles.

Training good for 365 days:

Development Information:  
Type: [ ] Level: [ ]

Class is obsolete: ☐

Required for Jobs:  
Strap Sewing

New Record

Record: 18 of 41

On the Training Class Information screen, enter a class number and revision. These are both required because the database uses this information to link the class to the job title (for required training) and to employees who have been trained.

The training class title should adequately describe the training. If the specified training is not a one-time event, the “training good for...” field gives you the option to specify how frequently this training should be done for each employee. The development information fields allow you to create custom training reports on types of training being done. The obsolete field allows you to “expire” training.

In the right-hand window you can select job titles for which this training class is required. This can also be set in the job title setup screen (see the Setup Job Information section of this document).



#### 4. Enter Training Records

**Enter Training Records**

Enter by Employee | Enter by Class

Last Name: Sample | First Name: Employee | Employee #: SAM991 | Job Title: Strap Sewing | View/Edit Job Requirements

Class No.	Rev.	Date	Level	Hours	Trained By	Eval. Method	Evaluated By
751320	000	2/11/2003	2		GRA732	Skill pass off	GRA732
					Gray, Maria		Gray, Maria
751330	000	3/2/2003	2		GRA732	Performance ev	GRA732
					Gray, Maria		Gray, Maria
751400	000	4/5/2003	2		GRA732	Skill pass off	GRA732
					Gray, Maria		Gray, Maria
751300	000	4/22/2003	3		GRA732	Skill pass off	GRA732
					Gray, Maria		Gray, Maria
751301	000	5/12/2003	3		MAR946	Skill pass off	GRA732
					Frias, Anabel		Gray, Maria
*		7/11/2003					

Record: 1 of 5

The Enter Training Records screen allows you to enter records of training classes completed. Use the Enter by Employee tab (see above) to enter multiple classes for one employee, or use the Enter by Class tab (see below) to enter multiple employees completing one class.

When entering by employee, you can find the correct employee by clicking the left and right arrows next to the Employee # field. Another way to find employees is to place the cursor in one of the gray fields at the top of the form and using the page up and page down keys. Also, pressing Ctrl-F will open a search dialog box.

When entering by class, you can find the desired class by clicking the left and right arrows next to the Class # field. Page up/page down keys and Ctrl-F also work with classes similar to employees.

**Enter Training Records**

Enter by Employee | Enter by Class

Class #: 751300 | Rev.: 000 | Class Name: Standard Strap cutting procedures for hot & cold knife cutting

Employee Num.	Date	Level	Hours	Trained By	Eval. Method	Evaluated By
SAM991	4/22/2003	3		GRA732	Skill pass off	GRA732
				Gray, Maria		Gray, Maria
EXA992	7/11/2003	2		GRA732	Skill pass off	GRA732
				Gray, Maria		Gray, Maria
BUT993	7/11/2003	2		GRA732	Skill pass off	GRA732
				Gray, Maria		Gray, Maria
	7/11/2003					

## 5. Custom Information Setup

The screenshot shows the 'Database Setup Form' with the 'Company' tab selected. The form contains the following fields:

- Company Name:** DFG Inc.
- Address:** PO Box 160217, Freeport Center Building E-11
- City, State, Zip:** Clearfield, UT, 84016-0217
- Email Address:** (empty)
- Phone Number:** (801) 773-4180
- Fax Number:** (801) 773-6716
- Website:** (empty)

There is a button labeled 'Enable Macros in Excel (only do this once)'.

The Database Setup Form is used to enter customization information for the database. The company tab contains company information. The company name field displays on the database main menu screen. Other company information entered can be used in reports. The other six tabs on the form are used to customize pull-down menus in the database.

The screenshot shows the 'Database Setup Form' with the 'Shifts' tab selected. The form displays a table of shifts:

Shift	Shift Hours
1	6:45am ~ 3:15pm
2	3:30pm ~ 12:00pm
3	11:00pm ~ 7:00am
Contract	On Contract
Office	8:00am ~ 5:00pm
OnCall	Varies
PT	Part time (anything less than 8 hrs.)

Record: 1 of 7

Use the Shifts tab to enter company shift information.

The screenshot shows the 'Database Setup Form' with the 'Train Levels' tab selected. The form displays a table of training levels:

Level	Explanation of Level
0	Need identified but not completed
1	Competent to perform task with supervision
2	Competent to perform task without supervision
3	Competent to lead task
4	Competent to perform and train task (qualified trainer)

Record: 1 of 5

Use the Train Levels tab to enter numeric values for various skill levels achieved through training.

The screenshot shows the 'Database Setup Form' with the 'Eval. Methods' tab selected. The form displays a table of evaluation methods:

Description of Evaluation Methods	List Order
Skill pass off	1
Written test	2
Performance evaluation	3
Written test/performance evaluation	4
Certificate	5

Record: 1 of 5

Use the Eval. Methods tab to enter methods of evaluating the effectiveness of training. Numbers may be entered to determine the order that entries will be listed on pull-down menus.

The screenshot shows the 'Database Setup Form' with the 'Educ.' tab selected. The form displays a table of education levels:

Education Description	List Order
High School Diploma/GED	1
Associates Degree	2
Bachelors Degree	3
Masters Degree	4
Doctorate Degree	5

Record: 1 of 5

Use the Educ. tab to enter levels of education that may be required for job positions. Numbers may be entered to determine the order that entries will be listed on pull-down menus.

The screenshot shows the 'Database Setup Form' with the 'Cert.' tab selected. The form displays a table of certifications:

Certificate/Certification Description	List Order
ASQ CQT	1
ASQ CQA	2
ASQ CQM	3
ASQ CQE	4

Record: 1 of 4

Use the Cert. tab to enter certifications that may be required for job positions.

The screenshot shows the 'Database Setup Form' with the 'Exp.' tab selected. The form displays a table of skills and experience:

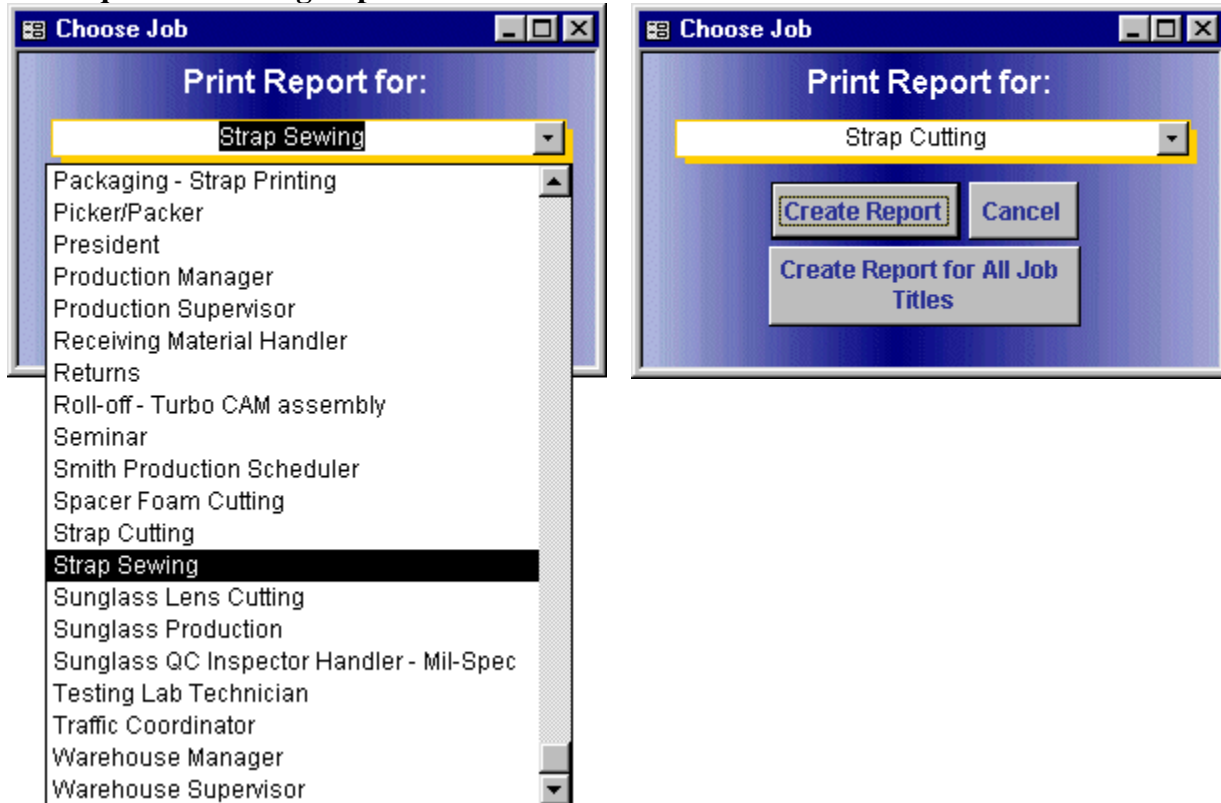
Description of Skills and Experience	List Order
1 year experience in	1
2 years experience in	2
3 years experience in	3
5 years experience in	5
10 years experience in	10
15 years experience in	15

Record: 1 of 6

Use the Exp. tab to enter skills and experience that may be required for job positions.



## 6. Required Training Report



From the Choose Job screen, select the job title of the job you want a report for. Clicking the Create Report button will create a Job Description report listing the requirements for the job, including responsibilities, authorities, education, certifications, experience, and job-specific training (see graphic below). Clicking the Create Report for All Job Titles button will create a job description for all job titles in the database.

### ***Job Description/Requirements***

**Job Title:** *Strap Cutting*

**Responsibilities:**

- Set-up & operate machines (sonic cutter, hot/cold knife cutter)
- Identify raw materials and general measuring
- Follow written and verbal work instructions
- Complete required paperwork regarding completed job assignments
- Ensure quality of the finished product

**Authorities:** Identify nonconforming product

**Education:**

**Certification:**

**Experience:**

- Machine operation helpful but not mandatory. Working in a manufacturing environment also helpful.
- Ability to read and understand measuring devices (Typically tape measures or rulers)
- The ability to see and identify visual cutting marks
- Simple math skills
- Good hand and eye coordination and manual dexterity.
- General writing and communication skills

#### **Training:**

<i><b>Class. #</b></i>	<i><b>Rev #</b></i>	<i><b>Class Name</b></i>
751300	000	Standard Strap cutting procedures for hot & cold knife cutting
751301	000	Ultrasonic Strap Cutting
751310	000	Standard strap assembly for slide & clip buckles
751330	000	Standard strap assembly to goggle frames

## 7. Employee Training Report

ID	Last Name	First Name
ROB689	Robison	Melita
ROC339	Rocha	Tina L.
ROD841	Rodriguez	David
ROM947	Romero	Jane
ROM194	Romero	Levi
ROP660	Roper	Julie A.
ROY734	Roye	Manuelita
SAL155	Salas	Joseph
<b>SAM991</b>	<b>Sample</b>	<b>Employee</b>
SAN345	Sanchez	Ana
SAN943	Sanchez	James R.
SAN561	Sandoval	Juan F.
SAU470	Saucedo	Rubicelia
SAU666	Saulsbury	Naomi
SCO011	Scott	Daniel E.
SCO212	Scott	Martha
SER678	Sereika	Jackie L.
SES602	Sessions	Dustin G.
SHE839	Sheltra	Richard J.
SIG688	Siglin	Kristen

From the Choose Employee screen, select the employee you want a report for. Clicking the Create Report button will create a report listing the qualifications of the employee, including education, certifications, experience, and job-specific training (see graphic below). Clicking the Create Report for All Employees button will create a report for all employees in the database.

### ***Training For An Employee***

*Emp. #:* SAM991      *Name:* Sample, Employee      *Job Title:* Strap Sewing

*Required* \_\_\_\_\_ *Achieved* \_\_\_\_\_

***Education:***

***Certification:***

***Experience:*** Machine operation helpful but not mandatory. Working in a manufacturing environment also helpful.  
 Good hand and eye coordination and manual dexterity.  
 General writing and communication skills.

<i>Class No.</i>	<i>Rev</i>	<i>Level</i>	<i>Class Title</i>	<i>Training Date</i>	<i>Trained By:</i>	<i>Eval By:</i>	<i>Eval Method:</i>
751300	000	3	Standard Strap cutting procedures for hot & cold knife cutting	4/22/2003	Gray, Maria	Gray, Maria	Skill pass off
751301	000	3	Ultrasonic Strap Cutting	5/12/2003	Frias, Anabel	Gray, Maria	Skill pass off
751320	000	2	Standard sewing procedures for sewing slide buckles, clip buckles, ends, Velcro patches and outriggers	2/11/2003	Gray, Maria	Gray, Maria	Skill pass off
751330	000	2	Standard strap assembly	3/2/2003	Gray, Maria	Gray, Maria	Performance evaluation

## 8. Class Training Report

The 'Choose Class' dialog box has a title bar with standard window controls. It contains a 'Class Number' dropdown menu. In the left screenshot, the dropdown is open, showing a list of classes. The class '751300 Standard Strap cutting procedures for hot & cold knife cutting' is selected. In the right screenshot, the dropdown is closed, and the 'Create Report' button is highlighted.

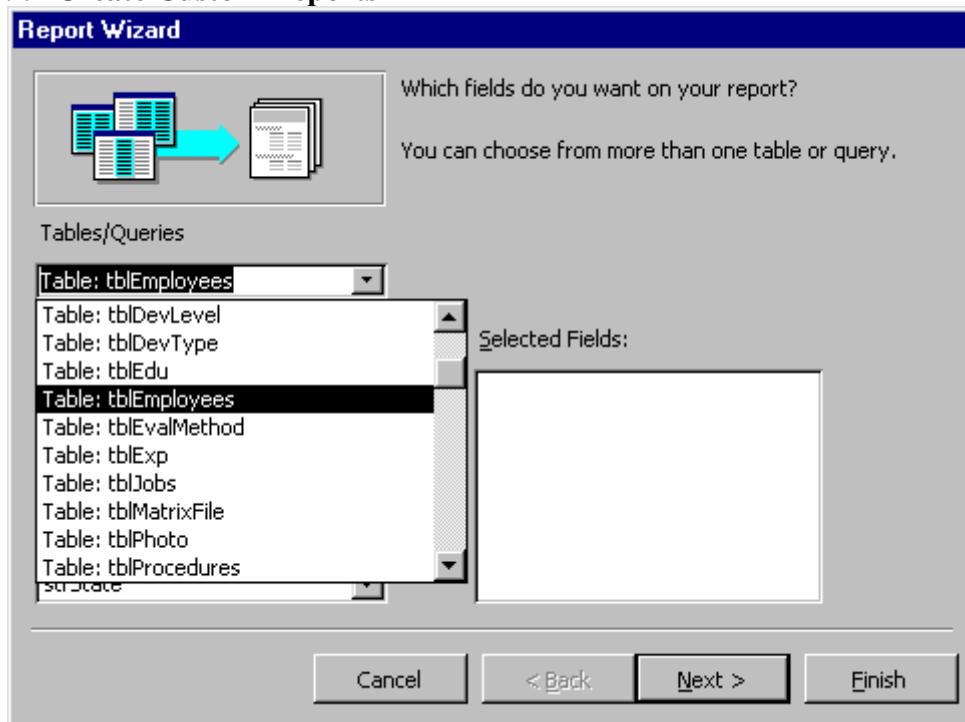
Class Number	Class Title
751220	Standard lens decorating procedures for pad printing
751230	Standard lens decorating procedures for hot stamping
751240	Universal lens assembly procedures
751300	Standard Strap cutting procedures for hot & cold knife cutting
751301	Ultrasonic Strap Cutting
751310	Standard strap assembly for slide & clip buckles
751320	Standard sewing procedures for sewing slide buckles
751330	Standard strap assembly to goggle frames

From the Choose Class screen, select the class you want a report for. Clicking the Create Report button will create a report listing the employees who have taken the class, the level of training achieved, and the date the training was completed (see graphic below). Clicking the Create Report for All Classes button will create a report for all classes in the database.

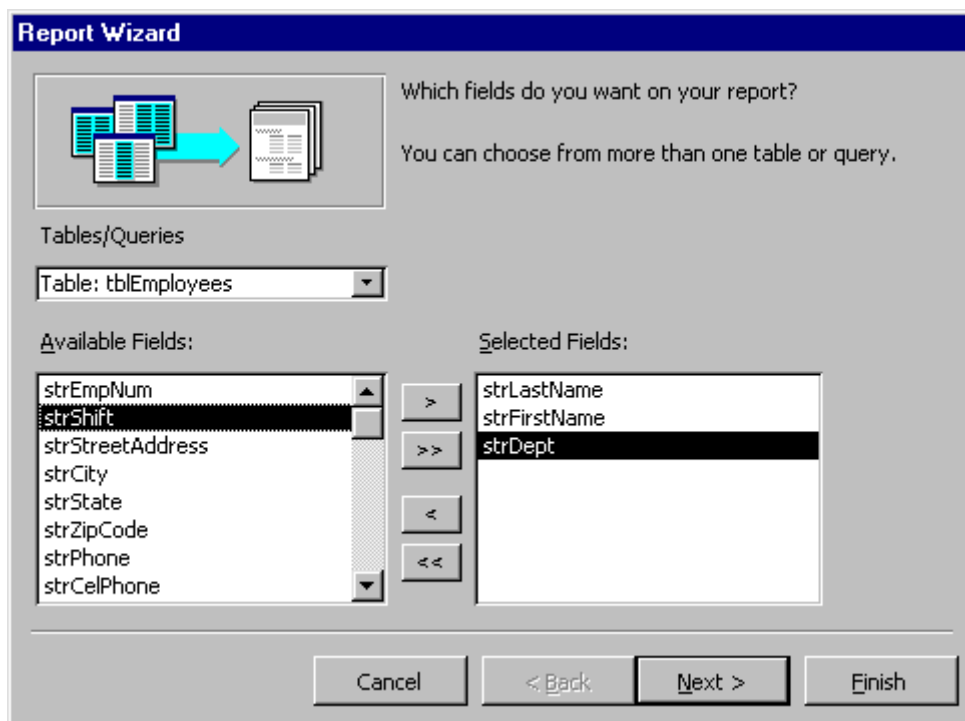
### *Training Completed for a Class*

Number	Rev	Class Title	Emp. Num	Level *	Name	Training Date
751300	000	Standard Strap cutting procedures for hot & cold knife cutting	AND069	0	Anderson, Stephen J.	7/11/2003
			BUT993	2	Butts, Seymour	7/11/2003
			COR303	0	Coria, Maria L.	7/11/2003
			COR386	0	Coria, Eva	7/11/2003
			EXA992	2	Example, Ann	7/11/2003
			PER927	0	Perez, Mercedes A.	7/11/2003
			SAM991	3	Sample, Employee	4/22/2003

## 9. Create Custom Reports



Selecting Create Custom Reports from the main menu will open the Access Report Wizard. To begin, select the table or query that has the information you want in the report. Do this by clicking on the arrow to the left of the Tables/Queries field, and selecting the one you want from the drop-down list. For information on how to create your own queries to combine information from more than one table, press F1 to open Microsoft Access Help.



When you have the table or query selected, select the fields you would like in the report. This can be done by double-clicking the field, or clicking the > button. Once the fields have been selected, click on the Next button.

**Report Wizard**

Do you want to add any grouping levels?

strLastName  
strFirstName

>  
<  
↑  
Priority  
↓

strDept  
  
strLastName, strFirstName

Grouping Options ...
Cancel
< Back
Next >
Finish

You can select grouping levels to break the data into groups. The graphic above shows that the data will be grouped by strDept (Job Title).

**Report Wizard**

What sort order do you want for detail records?

XXXXXXXXXX

XXXXXXXXXX

	1	2	3	4
A	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
1	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
2	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX

XXXXXXXXXX

	1	2	3	4
A	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
1	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
2	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX

XXXXXXXXXX

	1	2	3	4
A	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
1	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
2	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX

You can sort records by up to four fields, in either ascending or descending order.

1 strLastName A Z


2 A Z

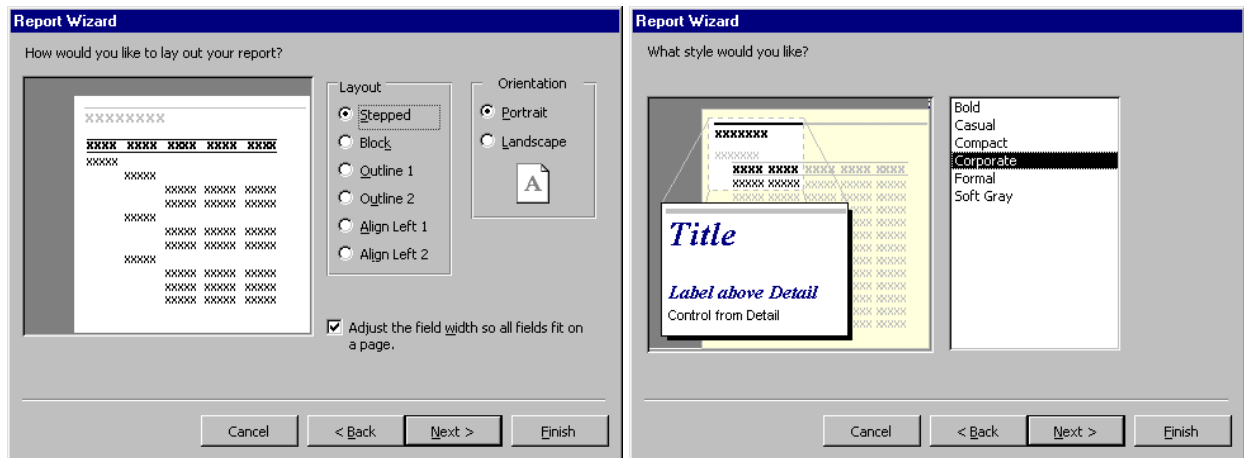
3 (None) A Z

4 strLastName A Z

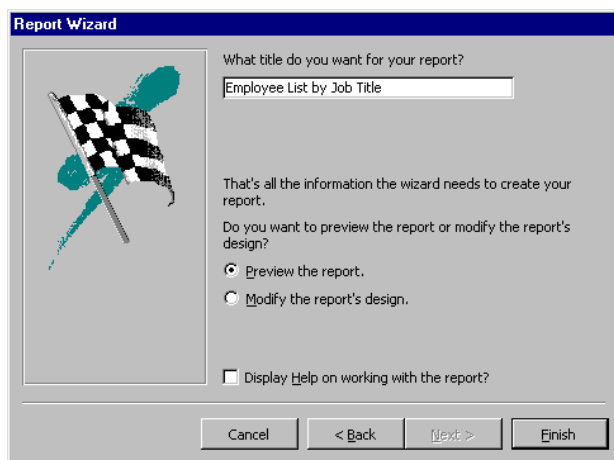
strFirstName A Z

Cancel
< Back
Next >
Finish


The next screen allows you to sort the data. Select the field(s) you want to sort by, then choose if you want the data sorted in ascending or descending order using the  button. Up to four fields can be sorted. The first field selected will take precedence.



The next screens allow you to select a layout type and pre-set styles.



Give the report a name, and click on the Finish button. The report will open, displaying the information you selected. For more information about working with reports, check the box next to “Display Help on working with the report.”

To find the report later, click on the Database Window icon () from the menu bar at the top of the Access. Click on the Reports tab on the left-hand side of the Database Window, and you should see your report. Double-click the report to display it.

<i>Employee List by Job Title</i>		
<i>strDept</i>	<i>Last Name</i>	<i>First Name</i>
<i>Strap Sewing</i>	Bullie	Arnuang D.
	Butts	Seymour
	Cassium	Emma
	Example	Ann
	Ginolfi	Somluk
	Karolewski	SomSong



## 10. Training Matrix

**Training Matrix**

Job Title  
Strap Sewing

Create Required Training Matrix

Create Crosstraining Matrix

Create Retraining Matrix

Go to Excel Spreadsheet

First select a job title, then select the type of matrix you would like created. There are three types of matrix: Training Matrix, Crosstraining Matrix, and Retraining Matrix. The “Go to Excel Spreadsheet” button will open the last matrix that was created, but will not update the information.

Training Matrix – lists all required training for a job title, and the training achieved by employees in the job. The numbers indicate the level of competence achieved.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
	Print Preview		Bullie, Arnuang D.	Cassium, Emma	Ginolfi, Somluk	Karolewski, SomSong	Lucas, Loma B.	Roper, Julie A.	Sample, Employee												
1	Strap Sewing Required Training	Training Title																			
2	751310 Rev 000	Standard strap assembly for slide & clip buckles	0	0	0	0	0	0													
3	751320 Rev 000	Standard sewing procedures for sewing slide buckles, clip buckles, ends, Velcro patches and outriggers	0	0	0	0	0	0	2												
4	751330 Rev 000	Standard strap assembly to goggle frames	0	0	0	0	0	0	2												

Crosstraining Matrix – lists people with other job titles who have completed training in the job you selected.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Print Preview	Strap Sewing Crosstraining	Anderson, Stephen J_	Arevalo, Ana L_	Coria, Eva	Coria, Maria L_	Cunningham, Jennifer	Lopez, Olivia	Madrigal, Alma	Pascacio, Elizabeth	Pegram, Gloria E_	Perez, Mercedes A_	Valenzuela, Rosa X_	Weaver, Shawn R_							
2	751310 Rev 000	Standard strap assembly for slide & clip buckles	0	0	0	0	0	0	0	0	0	0	0	0							
3	751330 Rev 000	Standard strap assembly to goggle frames	0	0	0	0	0	0	0	0	0	0	0	0							

Retraining Matrix –lists the dates that training needs to be completed for training that expires.

	A	B	C	D	E	F	G	H	I	J
1	Print Preview	Retrain Dates for Strap Sewing	Bullie, Arnuang D_	Cassium, Emma	Ginolfi, Somluk	Karolewski, SomSong	Lucas, Lorna B_	Roper, Julie A_	Sample, Employee	
2	751310 Rev 000	Standard strap assembly for slide & clip buckles	7/10/2004	7/10/2004	7/10/2004	7/10/2004	7/10/2004	7/10/2004		
3	751320 Rev 000	Standard sewing procedures for sewing slide buckles, clip buckles, ends, Velcro patches and outriggers	7/10/2004	7/10/2004	7/10/2004	7/10/2004	7/10/2004	7/10/2004	2/11/2004	
4	751330 Rev 000	Standard strap assembly to goggle frames	7/10/2004	7/10/2004	7/10/2004	7/10/2004	7/10/2004	7/10/2004	3/1/2004	