

Paymaster Online Tutorial

Training Module

When you send your employees on training, it is a good idea to keep track of what training they have done, and when. Our system can easily help keep track of these things.

First, you need to create the training course record on the company level.

Click on **company, training/skills/qualifications, training courses**

Your screen should look like this:

Training Courses

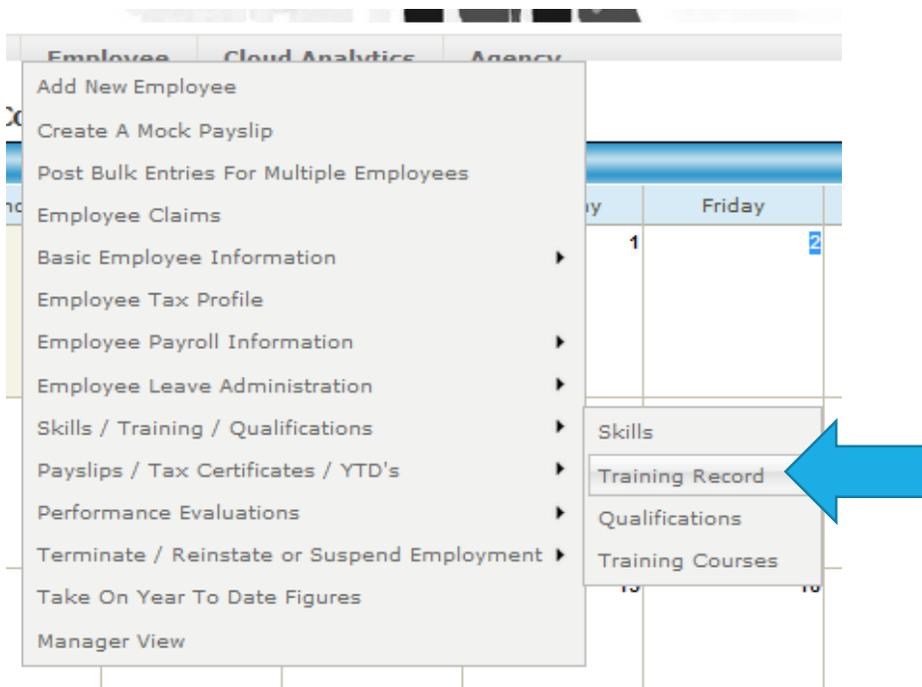
Details	
Training Report > Position Training Report	
* effective date:	26 October 2015
* course description:	<input type="text"/>
course overview:	<div style="border: 1px solid #ccc; height: 80px;"></div>
course duration:	<input type="text"/>
course requirements:	<div style="border: 1px solid #ccc; height: 80px;"></div>
course type:	--select one--
direct course cost:	<input type="text"/>
direct course cost notes:	<input type="text"/>
course duration in hours (used to calculate indirect cost):	<input type="text"/>
provider:	<input checked="" type="radio"/> Internal <input type="radio"/> External
institution:	<input type="text"/>
ABET/NQF level:	--select one--
credits:	<input type="text"/>
maximum candidates:	<input type="text"/>
minimum candidates:	<input type="text"/>
SAQA registered?	<input type="checkbox"/>
SAQA ID number:	<input type="text"/>
skills priority:	--select one--
program category:	--select one--
equity training:	<input type="checkbox"/>
expiry date:	<input type="text"/> clear

Fill in all the fields, and when you are done, click on save at the bottom.

Here is an example of a completed training course screen:

Details	
Training Report > Position Training Report	
* effective date:	2 November 2010
* course description:	intro to payroll
course overview:	all you need to know about the basics of payroll
course duration:	1 day
course requirements:	std 10
course type:	--select one--
direct course cost:	
direct course cost notes:	699
course duration in hours (used to calculate indirect cost):	
provider:	<input type="radio"/> Internal <input checked="" type="radio"/> External
institution:	paymaster
ABET/NQF level:	NQF 6
credits:	2
maximum candidates:	10
minimum candidates:	5
SAQA registered?	<input type="checkbox"/>
SAQA ID number:	
skills priority:	--select one--
program category:	--select one--
equity training:	<input type="checkbox"/>
expiry date:	30 November 2010 clear

To add training courses to your employee's profile, click on **employee, skills/training/qualifications, training record**



Once you have clicked on this option, your screen should look like this:

Employee Training Record

Details

* effective/start date :	26 October 2015 19:52	
end date :		
* course :	<input type="text"/>	
* status :	--select one--	
course result :	<input type="text"/>	
direct course cost :	<input type="text"/>	
invoice number :	<input type="text"/>	
facilitator :	<input type="text"/>	
assessor :	<input type="text"/>	
certificate no. :	<input type="text"/>	
certificate expiry date :	<input type="text"/>	
	<input type="checkbox"/> add reminder	
notes:	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>	
attachment:	<input type="button" value="Browse..."/>	No file selected.
indirect costs :		
employee rate :	<input type="text"/>	
travel cost :	<input type="text"/>	
accommodation :	<input type="text"/>	
facilitator cost :	<input type="text"/>	
food & beverage :	<input type="text"/>	
additional 5 :	<input type="text"/>	
additional 6 :	<input type="text"/>	

It is pretty detailed, so fill it in as much as you can. Once you have completed all the fields, click on save.

Here is a completed example:

Details

* effective/start date :	21 October 2015 08:00	
end date :	21 October 2015 17:00	
* course :	forklift driver	...
* status :	Attended	
course result :	90	
direct course cost :	1000	
invoice number :	fork001	
facilitator :	A Jackson	
assessor :	M Fundis	
certificate no. :	FORK123001	
certificate expiry date :	31 October 2016	
	<input checked="" type="checkbox"/> add reminder	
notes:		
attachment:	Browse... No file selected.	
indirect costs :		
employee rate :		
travel cost :		
accommodation :		
facilitator cost :		
food & beverage :		
additional 5 :		
additional 6 :		

Once you click on save, the record of the training course shows in the Training history section at the bottom of the screen.

Training History			
Effective Date	Course Description		
21 Oct 2015	forklift driver	0	Edit Delete
1			

To add some skills that you can link your employees to, click on **company, training / skills / qualifications, skills categories**

Here you can add in the category description and code, and these options will be available to you when you link the employee. Once you have filled in what you need, click on **save**.

Details [Click here to view audit trail](#)

* skill category description:	<input type="text"/>	
* skill category code:	<input type="text"/>	

Save

Skills Categories

filter - show categories starting with: Search

Code	Category Description	Edit	Delete
exce001	excell	Edit	Delete
is1	interviewing skills	Edit	Delete
mp1	management planning	Edit	Delete
typ 001	typing	Edit	Delete

1

To link the employee to a skill, click on **employee, skills/training/qualifications, skills**

Click on the blue link the add a new skill

Employee Skills

Details

[click here to add a new skill](#) 

Skills

You can now select the options you need from the drop down list

Employee Skills

Details

Skill Details ✕

* skill category:	--select one--	
* skill:	--select one--	
* proficiency:	excell	
* experience:	interviewing skills	
	management planning	
	typing	

Save

Skills

Employee Skills

Details

Skill Details ✕

* skill category:	excell	+
* skill:	--select one--	
* proficiency:	--select one--	
* experience:	--select one--	

Save

Skills

Employee Skills

Details

Skill Details ✕

* skill category:	excell	+
* skill:	ability to use excell	
* proficiency:	--select one--	
* experience:	--select one--	

Save

Skills

- Basic/Limited
- Expert/Specialist
- Extensive
- Not Applicable
- Solid

Employee Skills

Details

Skill Details ✕

* skill category:	excell	+
* skill:	ability to use excell	
* proficiency:	Extensive	
* experience:	--select one--	

Save

Skills

- select one--
- 1 - 2 Years
- 2 - 5 Years
- 5 - 10 Years
- Not Applicable
- Over 10 Years
- Up to 1 Year

Once you have selected your options, click on the save button. The newly added skill now shows in the skills section for this employee.

Details

[click here to add a new skill](#)

Skills

excell

▶ ability to use excell Extensive 1 - 2 Years [Edit](#) [Delete](#)

To add an employee’s qualifications to their profile, you first need to set the specific qualification up on the company level.

To do this, click on **company, training/skills/qualifications, qualifications**

Here you can add the description of the qualification and the NQF level, When you are done, click on save.

Qualifications Repository

Details [Click here to view audit trail](#)

* qualification description:

ABET/NQF level: --select one--

Save

Qualifications

filter - show qualifications starting with

Qualifications		
B TECH ENG		Delete
b.com		Delete
fork lift driver		Delete
hr		Delete
info on		Delete
payroll degree	Edit	Delete

1

When you have added the qualification to the company level setup, you can go to the employee setup to link the employee to the specific qualification.

Click on **employee, skills/training/qualifications, qualifications**

Here you can link the employee by selecting the correct options from the drop down selection.

Details

* date completed/to complete: October 2015

* qualification: --select one--

* education level: --select one--

final year subjects: B TECH ENG, b.com, fork lift driver, hr, info on, payroll degree

institution:

institution type: --select one--

highest qualification?

Save

Qualifications				
Date Completed	Qualification	Education Level	Institution	Inst. Type
1				

Details

* date completed/to complete:	October 2015
* qualification:	B TECH ENG
* education level:	--select one--
final year subjects:	<ul style="list-style-type: none"> --select one-- Certificate Degree Diploma Doctorate High School/Grade 12 (Matric) Honours Masters
institution:	None
institution type:	Professional Qualification
highest qualification?	Professorship
	Trade School

Qualifications				
Date Completed	Qualification	Education Level	Institution	Inst. Type
1				

Employee Qualifications

Details

* date completed/to complete:	October 2015
* qualification:	B TECH ENG
* education level:	Degree
final year subjects:	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p>250 characters available</p>
institution:	
institution type:	--select one--
highest qualification?	<ul style="list-style-type: none"> --select one-- College Company/In-House None Professional Institution Secondary/High School Technical School Technikon University

Qualifications				
Date Completed	Qual	Education Level	Institution	Inst. Type
1				

Once you are done with adding the qualification details, click on save.
 The qualification now shows in the Qualifications section at the bottom of the screen.

Qualifications						
Date Completed	Qualification	Education Level	Institution	Inst. Type		
Oct 2015	B TECH ENG	Degree		University	Edit	Delete
1						