



Employee Module

Human Resources Inventory

User Guide

Version 1

25 June 2013

Updated 30 June 2013

Robert McLaughlin

I-TECH

+1 (206) 897-1823

robmcl@uw.edu

Matt Heffron

I-TECH

+1 (206) 543-3151

heffrm@uw.edu

Contents

Overview	4
Terminology.....	4
Logging In.....	4
Forgot Your Password?	5
Partners.....	5
View/Edit partner.....	5
Add Partner/Sub Partner	7
Employees.....	7
View/Edit Employee	8
Add employee	11
Insert a new site.....	11
View/Edit Site.....	12
Reports.....	13
Employees Report	13
Partner Report	15

Overview

I-TECH has created a web application called TrainSMART – Training System Monitoring and Reporting Tool. TrainSMART has included an In-Service training tracking module since 2008. This guide serves as the training manual for the newest module that includes the Human Resource Inventory module.

Terminology

There are many terms used throughout this document to describe various parts of the site. These are defined below.

The screenshot displays the 'EMPLOYEES' section of the TrainSMART application. At the top, a green navigation bar contains 'HOME', 'PARTNERS', 'EMPLOYEES', 'REPORTS', and 'MY ACCOUNT'. A red box highlights the 'Search Employees' link, labeled 'Main Menu'. Below this is a 'Select Criteria' form with the following fields: First Name (text input), Surname (text input), Province (dropdown menu), District (dropdown menu), Sub-District (dropdown menu), Partner (dropdown menu), Site (dropdown menu), and Occupational Classification (dropdown menu). A red arrow points to the dropdown menus, labeled 'Drop-down Box'. A green 'PREVIEW' button is located at the bottom right of the form, labeled 'Button'. Below the form, the results are displayed as a table with 6 results. The table has columns for ID, First Name, Surname, Gender, Province, District, Sub-District, Site, ID Number, Passport Number, and Occupational Classification. The word 'Results' is written in red above the table.

ID	First Name	Surname	Gender	Province	District	Sub-District	Site	ID Number	Passport Number	Occupational Classification
1	Victor	Pepper	male						730506 6565 082	C3020200- Dental specialists
2	Augustine	Leberegane	male							NC04-Countr Director
3	Mangaliso	Leberegane	male	Gauteng	Ekurhuleni MM	Ekurhuleni E1 SD	gp Glynwood Hospital			C6010300- Middle Managers
4	Mangaliso	Leberegane (Test)								NC04-Countr Director
5	Lesego	Letebele	male							NC05-Data Capturer

- **Main Menu:** How a user navigates through the site. Clicking on an option on the main menu will display the drop-down menu underneath. Then you select the page you want to go to.
- **Drop-down box:** Click on the down arrow to display your choices and then select from the list.
- **Buttons:** Are typically green and will perform a task, such as executing a search.
- **Results:** A window that appears below search or reporting criteria that display the data that was returned by the user's request.

Logging In

To use the application, all users must have an account and login.

1. To log in, go to the URL provided to you for your country, which will look like this:
[http://\[your country project\].trainingdata.org/](http://[your country project].trainingdata.org/) (Your administrator will provide you with the exact address)
2. At the landing page (shown below), enter your user name and password. This will be supplied by your project administrator.
3. Click on the "Sign In" button.

Welcome to TrainSMART Malawi
Training System Monitoring and Reporting Tool

Please login below:

User name

Password

[Forgot your password?](#)

[SIGN IN](#)

Forgot Your Password?

If you have forgotten your password, you can get a new temporary password created.

1. From the landing page, click on the link “Forgot your password?”
2. Enter the email address assigned to your account.
3. Click on “Send password” button.
4. You will receive an email at that email address with the temporary password.

Partners

The Partner page can be accessed by hovering over the Partners hyperlink on the menu bar. A drop down will appear and View/Edit Partner can be selected.

HOME PARTNERS EMPLOYEES REPORTS MY ACCOUNT

Search Part [View/Edit Partner](#)
[Add Partner](#)

View/Edit partner

This will open up the “Search Partners” Page.

Search Partners

Select Criteria

Partner Name

Province

District

Sub-District

[PREVIEW](#)

Select criteria below to identify the partner you want to view/edit as follows:

1. Partner ID : drop down list of partners/sub-partners entered
2. Province
3. District
4. Sub-district
5. Click “Preview” to generate the partner list.

Search Partners

Select Criteria

Partner Name

Province

District

Sub-District

[PREVIEW](#)

Partners 7 Results [Print](#) [Export](#)

[Add New Partner](#)

ID	Partner Name	Province	District	Sub-District
1	I-TECH	Gauteng	Tshwane MM	Tshwane Cent SD
2	AIDS Training Centre (ATC)	North West	Bojanala Platinum DM	Rustenburg LM
3	Human Sciences Research Council (HSRC)	Gauteng	Tshwane MM	Tshwane Cent SD
4	National Department of Health (NDOH)	Gauteng	Tshwane MM	Tshwane Cent SD
5	Test Partner (Augustine)	Limpopo	Capricorn DM	Polokwane LM
6	Kuruman Community Development Centre (KCDC)			
7	Health & Welfare SETA			

**All data is not reflective of actual employees and is for training purposes only*

1. Print: click on this link to print the list generated
2. Export: click on this link to export the list to Excel for further analysis as required

Note:

- All columns are sortable by clicking on the column header.
- This search can also be used as a report by returning to the screen selected criteria based on personal selections.

Click on the ID desired to open up the partner page, where you can view/edit the data as required. If no search criteria are selected, all partners in the database are displayed. To filter for a specific partner, you may select one or more selection criteria.

Note:

- You do not have to fill any of the search fields to generate data.

The Edit Partner page contains the following data points:

1. Partner ID – A system generated ID
2. Partner Name
3. Type of Partner
4. Address1 and Address2
5. City/Region A/Region B
6. HR Contact Person Name
7. HR Contact Office Phone
8. HR Contact Office Fax
9. HR Contact Email

Edit Partner

Partner ID

*Partner Name [Delete this Partner](#)

*Type of Partner

*Address 1

*Address 2

*City

*Province

*District

*Sub-District

*HR Contact Person Name

*HR Contact Office Phone

*HR Contact Office Fax

*HR Contact Email

SAVE

When Complete press the Save Button and confirmation will appear.

Note:

- (*) denotes a required field

Add Partner/Sub Partner

To add a new partner or Sub Partner, Hover on the Partners hyperlink in the Menu Bar and select the Add Partner tab from the drop down. All fields in this screen are compulsory. You may use this screen to capture a new Partner and/or Sub-Partner organizational data. The data only has to be entered once per organization.

Add Partner

*Partner Name

*Type of Partner

*Address 1

*Address 2

*City

*Province

*District

*Sub-District

*HR Contact Person Name

*HR Contact Office Phone

*HR Contact Office Fax

*HR Contact Email

SAVE

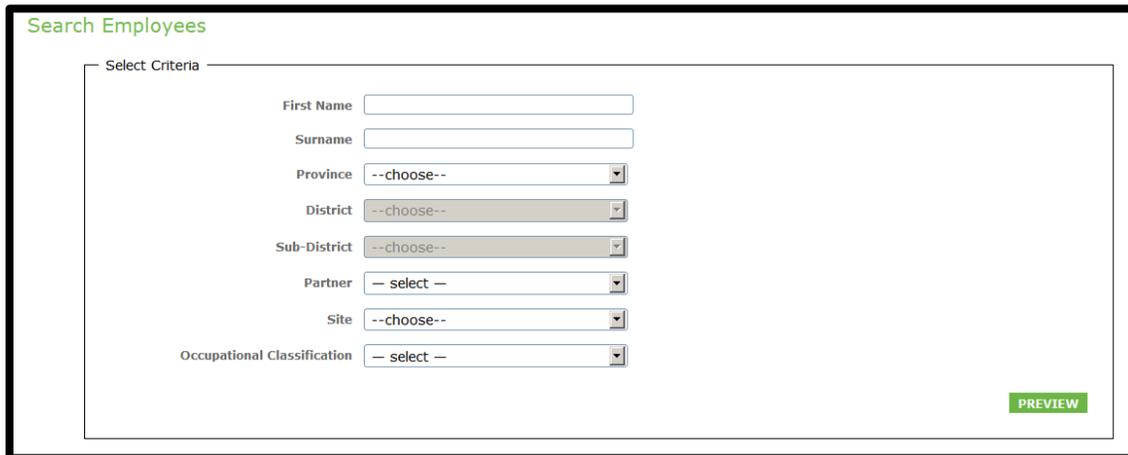
Employees

The Employee page can be accessed by hovering over the Employees hyperlink on the menu bar. A drop down will appear and View/Edit Employees can be selected.

HOME	PARTNERS	EMPLOYEES	REPORTS	MY ACCOUNT
Search Employees		View/Edit Employee	Add Employee	

View/Edit Employee

This section enables the user to make view or edit employee's information. To view or edit an employee in the system, you must first search for the required person. To search, click on the View/Edit Employee tab.



Select from the drop down lists for one or more of the criteria listed below to identify the employee you want to view/edit. If no search criteria are selected, all employees in the database are abstracted. **Note:** you do not have to fill all of the search fields to generate data.

1. First Name: enter the specific first name of the individual required
2. Surname: enter the specific surname of the individual required
3. Province: select the specific province the person is based at from the drop down lists.
4. District: select the specific district the person is based at from the prepopulated drop down lists.
5. Sub-district: select the specific sub-district the person is based at from the prepopulated drop down list.
6. Partner: select the name of the partner from the prepopulated drop down list
7. Site Name: select the specific site the person is based at from the prepopulated drop down list.
8. Occupational classification: select the occupational classification from the prepopulated drop down list.

Once you have entered or selected the search criteria, click the "Preview" button on the right footer of the page to generate the employee list filtered by the criteria selected.

A table will appear on the footer of the screen as per the selection criteria. Just selecting Preview without any criteria will return all Employees.

Search Employees

Select Criteria

First Name

Surname

Province

District

Sub-District

Partner

Site

Occupational Classification

PREVIEW

Employees 6 Results

[Print](#) [Export](#) 

[Add New employee](#)

ID	First Name	Surname	Gender	Province	District	Sub-District	Site	ID Number	Passport Number	Occupational Classification
1	Victor	Pepper	male						730506 6565 082	C3020200-Dental specialists
2	Augustine	Leberegane	male							NC04-Country Director
3	Mangaliso	Leberegane	male	Gauteng	Ekurhuleni MM	Ekurhuleni E1 SD	gp Glynwood Hospital			C6010300-Middle Managers
4	Mangaliso	Leberegane (Test)								NC04-Country Director
5	Lesege	Letebele	male							NC05-Data Capturer
6	Keitumetse	Leserwane	female	Northern Cape	J T Gaetsewe DM	Ga-Segonyana LM	nc Tshwaragano Hospital			B1010400-Human Resources Clerks

The following fields will reflect on the table:

1. ID (assigned by the system)
2. First Name
3. Surname
4. Gender
5. Province
6. District
7. Sub-district
8. Site Name
9. ID Number
10. Passport Number
11. Occupational classification

Print: click on this link to print the list generated

Export: click on this link to export the list to Excel for further analysis as required

Note:

- All columns are sortable by clicking on the column header.
- This search can also be used as a report by returning to the screen selected criteria based on personal selections.

Select the employee by clicking on the ID number on the left column of the table. This will redirect the user to the "Edit Employee" screen, where you can view/edit the data as required.

Edit Employee

Person ID

Title

[Delete this Employee](#)

*First Name

Middle Name

*Surname

*Date of Birth (dd/mm/yyyy)

*Nationality

ID Number

Passport Number

Race

Gender

Disability

*Partner

*Based at

*Province

*District

*Sub-District

Site Name [Insert a New Site](#) [View/Edit Site](#)

Site Type

*Occupational Classification

*Primary Role

Hours Worked per Week

Annual Cost to Company (CTC) Amount

*Salary

*Benefits

*Additional Expenses

*Stipend

Annual Cost

Contract End Date

*Intended Transition

Transition Date

Actual Transition Outcome

Actual Transition Date

[SAVE](#)

The data points included on this page include:

1. Person ID – A system generated number
2. Title
3. First Name, Middle Name, Last Name
4. Date of Birth
5. Nationality
6. Id Number
7. Passport Number
8. Race
9. Gender

10. Disability
11. Partner
12. Based at
13. Region A, Region B
14. Site Name
15. Site Type
16. Occupational Classification
17. Primary Role
18. Hours Worked per Week
19. Annual Cost to Company (CTC) Amount
 - a. Salary
 - b. Benefits
 - c. Additional Expenses
 - d. Stipend
 - e. Annual Cost
20. Contract End Date
21. Intended Transition
22. Transition Date
23. Actual Transition Outcome
24. Actual Transition Date

Add employee

To add a new employee, select the Add Employee Tab from the Employees drop down. The Add Employee page contains the same fields as the View/Edit Employee Page and contains the same data fields

Insert a new site

If the site you are looking for does not appear in the drop down menu click on the “Insert a new site” link beside the Site field.

Add new Site

*Site

Address 1

Address 2

*Province

*District

*Sub-District

City New city

Phone

Fax

*Site type

Comments

ADD SITE

The site page includes the following data points:

1. Site Name
2. Address 1 & Address 2
3. City/Region A/Region B

4. Phone/Fax
5. Site type
6. Comments
7. Add Site button: Click on this button when all fields have been completed to add the new site to the database.

View/Edit Site

Clicking on the Insert a New Site to search, edit or view site data. Click on the View/Edit site link beside the Site field.

*Sub-District

Site Name [Insert a New Site](#) [View/Edit Site](#)

Site Type

To identify the site to be viewed /edited, search for the site by selecting and completing one or more fields in the search criteria. The fields include:

1. Site name
2. Province
3. District
4. Sub-district
5. Site Type
6. Facility Sponsor

Once search criteria have been entered click on the “Preview” button. This will generate a list of facilities matching the search criteria in a table at the foot of the selection criteria. Select the required facility by clicking on the ID number on the left column of the table. This will open up the “Edit Site” page for the specified site.

Search Site

Select Criteria

Site Name

Province

District

Sub-District

Site Type

Site Sponsor

[PREVIEW](#)

Site **5781 Results** [Print](#) [Export](#)

[Add New Site](#)

ID	Site Name	Province	District	Sub-District	Type	Sponsor
1	ec Aberdeen Hospital	Eastern Cape	Cacadu DM	Camdeboo SD	Educational Institute	
2	ec Aberdeen Mobile 1	Eastern Cape	Cacadu DM	Camdeboo SD		
3	ec Addo Clinic	Eastern Cape	Cacadu DM	Kouga SD	Community Based Services	
4	ec Addo Mobile 1	Eastern Cape	Cacadu DM	Kouga SD		
5	ec Addo Mobile 2	Eastern Cape	Cacadu DM	Kouga SD		
6	ec Addo Satellite Clinic	Eastern Cape	Cacadu DM	Kouga SD		
7	ec Adelaide Gateway Clinic	Eastern Cape	Amathole DM	Nkonkobe SD	Community Based Services	
8	ec Adelaide Hospital	Eastern Cape	Amathole DM	Nkonkobe SD	Educational Institute	
9	ec Adelaide Mobile 1	Eastern Cape	Amathole DM	Nkonkobe SD		
10	ec Adelaide Mobile 2	Eastern Cape	Amathole DM	Nkonkobe SD		
11	ec Aeroville Clinic	Eastern Cape	Cacadu DM	Camdeboo SD	Community Based Services	
12	ec Asondering Clinic	Eastern Cape	A Nzo DM	Maluti SD	Community Based Services	
13	ec Agnes Rest Clinic	Eastern Cape	C Hani DM	Emalaheni SD	Community Based Services	

Select the number of the site you would like to edit, view, or delete.

Edit Site

Site: ec Aberdeen Hospital

Facility name: ec Aberdeen Hospital

Address:

Address 2:

Province: Eastern Cape

District: Cacadu DM

Sub-District: Camdeboo SD

City: New city

Postal code:

Latitude:

Longitude:

Phone:

Fax:

*Site type: Educational Institute

Comments:

[DELETE](#) [SAVE CHANGES](#)

Data points include:

1. Site
2. Site Name
3. Address, Address2
4. District A, District B, City
5. Postal Code
6. Latitude and Longitude
7. Phone, Fax
8. Site Type
9. Comments

Reports

The Reports page can be accessed by hovering over the Reports hyperlink on the menu bar. A drop down will appear with Employees and Partners tabs for reporting

HOME	PARTNERS	EMPLOYEES	REPORTS	MY ACCOUNT
Edit Site			Employees Partners	

Employees Report

This report can be accessed by clicking on the Employees tab under reports.

Employee Report

Select Criteria

show filter

Partner -- select --

Province --choose--

District --choose--

Sub-District --choose--

Site --choose--

Facility Type -- select --

Occupational Classification --choose--

Funded Hours per week to

Annual Cost to

Primary Role -- select --

Intended Transition -- select --

PREVIEW

Employees 6 Results

[Print](#) [Export](#) 

ID	First Name	Surname	Gender	Province	Partner	Site	Site Type	Occupational Classification	Annual Cost	Primary Role	Intended Transition
1	Victor	Pepper	male		I-TECH			C3020200-Dental specialists	400001	Program Management	
2	Augustine	Leberegane	male		I-TECH			NC04-Country Director	0	Service Delivery	Absorbed by SAG
3	Mangaliso	Leberegane	male	Gauteng	Test Partner (Augustine)	gp Glynwood Hospital		C6010300-Middle Managers	80000	Program Management	Other, Specify
4	Mangaliso	Leberegane (Test)			I-TECH			NC04-Country Director	80000000000	Technical Assistance	Absorbed by SAG

1. Filter the criteria by completing the fields required, using the drop-down lists
2. Click on the "Preview" button to see the results in the "Search Results Screen"
3. For further analysis, select the "Export" function and the data will be exported into the MS-Excel format
4. To print the table generated, click on "Print"
5. All columns are sortable

Partner Report

This report can be accessed by clicking on the Partners tab under reports.

Partner Report

Select Criteria

Partner

Province

District

Sub-District

Site

Facility Type

Occupational Classification

Funded Hours per week to

Annual Cost to

Primary Role

Intended Transition

[PREVIEW](#)

Partners 7 Results [Print](#) [Export](#) 

ID	Partner	Employee Count	Sites
1	I-TECH	6	
2	AIDS Training Centre (ATC)	0	
3	Human Sciences Research Council (HSRC)	1	
4	National Department of Health (NDoH)	0	
5	Test Partner (Augustine)	1	gp Glynwood Hospital
6	Kuruman Community Development Centre (KCDC)	1	nc Tshwaragano Hospital
7	Health & Welfare SETA	0	

1. Filter the criteria by completing the fields required, using the drop-down lists
2. Click on the "Preview" button to see the results in the "Search Results Screen"
3. For further analysis, select the "Export" function and the data will be exported into the MS-Excel format
4. To print the table generated, click on "Print"
5. All columns are sortable