SMART Training Management Software

Managing employee training for a mid to large sized organization with multiple work groups, each with their own specific training and licensing requirements, is a time-consuming and difficult process. In addition, tracking and managing refresher training on an ongoing basis is a difficult challenge.

The SMART Training Management Software System is the easy way to ensure all your employees have received adequate training, licenses and certifications. The training management software enables Health and Safety and Training Managers to set up requirements for each job category and view each employee's training records individually to ensure all required classes have been completed and are current and up-to-date.

To make training registration easy, the SMART Training Management Software stores in-house and outside training provider information and provides electronic links to their web site and e-mail. In addition, the software can provide attendees with class registration confirmation via e-mail.

The system operates in single-user mode or can be configured for multi-user client-server operation. SMART is available for both IBM and MAC operating systems.

Key Capabilities:

- Enables users to set up work groups and track completed training for each individual in the group
- Stores copies of training certificates and licenses
- Stores and tracks training history for each employee to ensure compliance with OSHA and company training requirements
- Alerts users when refresher courses or other events are due
- Stores in-house and outside training provider information and course schedules for quick and easy registration of individuals or groups

Benefits:

- Reduces costs by providing quick and easy access to employee training records
- Improves company performance by ensuring only properly trained and certified individuals are assigned to jobs and projects
- Reduces the risk of regulatory fines and citations by managing training records and tracking refresher training

Instructions:

These instructions are to be used as a guide as you move through the software. Sample data is available in the system.

Set-Up Wizard:

When you first start using SMART we recommend starting with the SMART Set-Up Wizard. Here you can establish the primary data such as your Sites, Employee Classification, Training Providers and Courses to make your system operate smoothly. You can always change any of the data input at a later date. It is best to read once through the wizard process, then gather the information/resources you need to populate the set-up tables, then re-enter the set-up wizard. You can return to the set-up wizard at any time.

Add An Employee:

1) From the Home Page, click on Employee List
2) Click on the "+" Plus sign at the top of the screen
3) Enter the General Information for the Employee. General information includes name, address, site, type of employee, photo, etc.

Find an Employee:

1) From the Home Page, click on Find an Employee
2) You will now be taken to a blank form in which you can specify your search criteria. Fill in just enough information to define the record you are looking for. Click the Continue button in the status area on the left side of the screen.

Assign Employee to a Classification:

Employees can be assigned to classifications in order to automate a set of courses/training events for a group of people. This will speed up the data entry process as well as remind you that each employee has taken all the appropriate classes.

In the upper right region of the employee detail screen is a list where you can add a classification to this employee. Each classification represents specific training requirements. The specific requirements are assigned to a classification from the main menu Classifications link. If you click into the classifications box on the employee detail screen, a list of predefined classifications will pop-up. Pick from one of the predefined classifications to add it for this employee. If you need to ADD a new classification that you don't see on the list, you can click on the hyperlinked title of the classifications table on this screen and you will be taken to the classification definition area.

Next, you must decide if this classification for this employee should include just the Standard requirements, or if it should also include any HazMat requirements that are also defined by the classification. If you select HazMat, then all requirements (both Standard and HazMat) will be added for this employee. If you select "Standard," then only the standard requirements will be added.

If you wish to review the requirements currently assigned to that classification, click on the button labeled "REV" for review next to the classification you just assigned and you will be taken to the detail screen for that particular classification. Once you have adjusted/reviewed the classification requirements, you can return to the current employee by clicking on the hyperlink on the top of that screen labeled "Return to LAST Employee".

Finally, to assign the class requirements for this particular employee, click on the "UPD" (for Update) button next to that classification on the Employee detail screen. The program will then review the currently assigned requirements for this employee and will ADD any requirements from the current classification which have NOT already been added to the current employee.

You can also add requirements one at a time rather than by classification groups.

Changing Requirements:

1. If you change the requirements for a classification (by adding or removing requirements for that classification), there will be no impact on employees who already have their requirements and classifications assigned. Only new class assignments and updates will incorporate the change.

2. If you remove a classification from the employee's classification list, no requirements will be removed from the employee. If you wish to remove requirements from an employee, you need to do that one requirement at a time by clicking on the delete button on each requirement record.

3. Once you become knowledgeable and proficient with the system, and if you have the appropriate access permissions, you will be able to perform batch scripted operations to change, add, update, or delete groups of records and requirements.

Training Records:

For each employee, you can record any number of training events or certification confirmations. These items can either expire periodically or never expire. For each one, you can embed a scanned certificate or PDF. You can use these items to track asbestos training, heavy equipment operation training, confined space training or any other job related requirement. Usually, system administrators will populate the requirements table in advance so there will be drop-down choices of requirements to select. You can, however, add these requirements on-the-fly if you like. Read the help for "classifications" to learn how to add groups of requirements at one time. Once a class is eclipsed by a newer class, you can archive the old class rather than erase it. Read the topic below for archive instructions.

Archives:

You can ARCHIVE any requirement assigned to an Employee by clicking on the ARC button on the right side of that requirement's record. This will make a COPY of that requirement in the Employees training archive and will reset the dates and container for the current requirement to be empty. Then, you can update the dates of the requirement with the current event to reflect its current status. If you wish to delete a requirement from an employee, you should decide if you wish to archive that requirement first, then delete it after the record has been archived. Once a requirement record has been deleted, it cannot be recalled. If you ARCHIVE a requirement however, it can be reviewed by clicking on the View Archived Requirements hyperlink at the bottom of the requirements section. Archived requirements can be viewed, but not recalled to active duty.

Scanning Training Certificates:

If you wish to embed a scanned image of the Training certificate, first create the scanned file and put it somewhere where you can find it again on your computer or network.

Then return to this screen and RIGHT-CLICK in the white field beneath the camera on the line of the training event, then follow these steps:

1. Select INSERT OBJECT from the pop-up menu
2. Click on the Create From File radio button
3. Click on BROWSE and select the stored the digital certificate.
4. Click on the Display as Icon check box
5. Wait and the field will be filled with an icon as the digital certificate is embedded in the record.

To VIEW the digital certificate, double-click on the icon that has been inserted.

Schedule upcoming training:

The purpose of this section of the training screen is to let you schedule upcoming training events for an employee. For it to work properly, you need to:

1. Populate the Requirements table so there are classes that can be scheduled (See Set-up Wizard)
2. Populate the Providers table so there are Providers that can be selected (See Set-up Wizard)
3. Create an employee record

The first field is for the date that you created for the scheduled event. Select the requirement by clicking in the requirements field and scrolling through the available requirements already stored in the system. Now, click over to the provider field and select the from the list of providers that provide the training. Only providers who have been selected to offer this requirement will appear.

If you click on the "?" button next to the provider, you will be taken to the the details for that provider where you can link to their web site, or send them an e-mail. Click on the Return to Last Employee hyperlink at the top of the providers screen when you are done. Providers can be vendors or individuals.

You can click on the "Reminder" hyperlink to create an e-mail message to this employee informing them of the date, location and other details of the training.

Finally, you can change the status of the event from scheduled, to postponed, to completed.

Once the requirement has been completed, you can POST the event to the training history for this employee by clicking on the POST hyperlink in the appropriate row. Once the new class has been added to the employee's training history, be sure to Archive any previously existing classes for the same requirement.