SIERRA Pacific Software

Training Officer 2000 V3

Sierra Pacific Software

12784 SW Rembrandt LN

Tigard, OR 97224

503-585-7022

www.trainingofficer2000.com

Table of Contents

Getting Started:

Step by Step:

The Training Officer® 2000 V3
Quick Start Guide

Update Policy

Sierra-Pacific Software periodically releases maintenance updates to its software program. It is our update policy that all updates will be made available to eligible users as soon as is practical. To check on the availability of maintenance releases, check our web site at: http://www.trainingofficer2000.com

Updates are defined as minor changes within the main program to add or enhance an existing feature or to fix a known issue commonly referred to as a "bug". Updates are free of charge for existing users who have purchased the software and subscribe to the annual support service. Updates are not available to those who do not subscribe to the annual support service. Upgrades are defined as a new version of the existing program whereas the old version has been overhauled and significantly altered to visually and functionally display as a new version. Upgrades are available for purchase by existing customers at a discounted price. Sierra Pacific Software ultimately determines if the release of software is an update or an upgrade, the above listed definitions are simply generalities.

Input from our customers is greatly appreciated and will assist us in enhancing our programs and developing new products to meet your needs.

Customer Support

You should rely on your user manual and or the support portion of the website regarding any questions you have about using your program. If you encounter a technical problem with Sierra-Pacific Software products, please call our customer support line at (503) 585-7022 or email support@trainingofficer2000.com We are here to be of service to you. Customer support assistance is available between 8:00 a.m. to 5:00 p.m. Pacific Time, Monday through Friday.

Limited Warranty

SIERRA-PACIFIC SOFTWARE WARRANTS THAT THE PROGRAM DISCS ARE FREE FROM DEFECTS IN MATERIALS AND WORKMANSHIP WHILE IN NORMAL USE, FOR A PERIOD OF NINETY (90) DAYS FROM THE DATE OF PURCHASE. IF A DEFECT APPEARS DURING THIS PERIOD, YOU MAY RETURN THE FAULTY DISC TO SIERRA-PACIFIC SOFTWARE WITH PROOF OF PURCHASE, AND THE DEFECTIVE DISC(S) WILL BE REPLACED FREE OF CHARGE.

Copyright

The Training Officer® 2000 V3
Quick Start Reference Guide

The ***Quick Start Reference Guide*** is provided to give you the procedures that will get you started using the Training Officer® 2000 V3.

Read or print the entire *Getting Started Section* contained in the Training Officer® 2000 Help Section. *Review the Training Officer® 2000 Help File Addendum Booklet*.

Follow and complete all steps noted in the Getting Started Section of the Help Section.

- Pay particular attention to the Introduction Section concerning Organizational Cost Centers. *Note: You will need to create at least one (1) cost center to identify your Organization.*

- To view the Subject / Category Listing that was included in the Training Officer® 2000.

- To access the existing Subject and Categories in the Training Officer® 2000... Select the Reports Module then select the Subject Category Listing Report.

- Add your employees to the Training Officer® 2000 program. This is done in the Employees Module → Add Employee.
  Note: You may use the enclosed Employee Profile Form to collect the employee profile information.

When each of the bullet points above have been completed
you are ready to add the employee's training records to the system.

- You will need to add each basic class (training) to the system *one time* for each class. This is done in Training Module → Add Subject, Category, Course and Session.

Now you are ready to begin to add training records for the individuals on the system...

- There are now two ways to add training records for an individuals or groups of individuals. One is found in the Training Module, the second found in the Employee Module.

- *Note: The complete Training Officer® 2000 V3 User's Guide is accessed from the Help Menu Option or the [F1] Key.*

Running the Full Program for the First Time

The following items will also be shown on the screen and will need to be entered in the full Training Officer® 2000 V3 program.

- ***Budget Year Beginning Date*** - This is the date that your current budget year began.

- ***Vendor Letter Signature Name***
Vendor Letter Signature Title
Vendor Letter Telephone
This applies to the person that is responsible for the training function.

- ***"cc:" Name / Unit*** - This applies to the person in your accounts payable unit that processes your training charges.

- ***Budget Period*** *(1 or 2 years)* - Enter your organizational budget period.

- ***Track Finances*** - The program will only perform budgeting functions if the box is checked. To ignore budgeting functions, leave the box un-checked.

- ***Organization Name*** - Enter the name of the organization here. This is printed on the top of all reports.

- ***Precinct / Station Name*** - This information is optional...

- ***CPR and First Aid Category Codes*** - The category codes for CPR and First Aid supplied with The Training Officer® 2000 V3 are 140-002 and 140-003 respectively. If you should change the First Aid and CPR Category Codes... you must enter the new codes in the Options Module under Reserved Categories.

Getting started with The Training Officer® 2000 V3

You will need to complete the following three (3) steps before The Training Officer® 2000 V3 will be ready for immediate and full operation.

You must establish a cost center (work location) scheme for your organization. This operation can be accomplished as follows:

1) Select the Budget Module from the Home Screen. It is advisable to work from a copy of your organizational chart to create the cost center scheme designating each work location within you organization (see Cost Center Procedure).

2) You should create the numbering sequence from a copy of your organizational chart. It is recommended that you review the Cost Center Procedure in the Procedures Section of the Electronic Help File before continuing with this operation.

Read Me First
Section

<u>Subject-Category Setup and Review</u>

Review the Training Subject / Categories supplied with the program.

> This can be done by running the...Print Subject / Category Listing in the Reports Module.
>
> You should add or change any Subject or Categories that are not appropriate for your organization. You should review the Subject and Category Procedures in the Procedures Section of the Electronic Help File before continuing with this operation.
>
> *NOTE: When this step has been completed, you will be ready to add the specific training courses to the system. Please review the Course Procedure in the Procedures Section of the Electronic Help File.*
>
> Once the Cost Centers for the organization have been created, you will then be able to add your employees to the system. This is done by selecting the "Add Employee" option from the "Employees" drop-down menu option. Please review the Employee Procedure in the Procedure Section of the Electronic Help File.

This concludes the necessary steps to get the program fully operational. If you encounter any problems or have any questions, please call...

Sierra-Pacific Software
(503) 585-7022
support@trainingofficer2000.com

You will receive free customer support for one (1) year from the date of purchase. Support beyond the first year is charged a flat fee for unlimited support.

Introduction to
The Training Officer® 2000 V3

The Introduction Section will acquaint you with the fundamental concepts incorporated into The Training Officer® 2000 V3. A thorough understanding and application of the material presented will enable you to achieve the maximum results of the program in managing your training function.

Introduction to
The Training Officer® 2000 V3

The Training Officer® 2000 V3 enables your training program to respond to the dynamic forces present in your organization's training environment. The proper application of The Training Officer® 2000 V3 can support the attainment of your organization's missions and goals by enhancing the job performance of all individuals.

This section outlines a series of recommended steps to be followed to obtain the maximum results of this program. We assure you that the time spent in the following activities can yield tremendous benefits to your organization.

BUDGETING AND COST (*Work*) CENTERS

This section will guide you through the steps necessary to establish a cost center scheme that reflects the make-up of your organization. If your organization has a series of digits that reflects the organizational structure, you may use them. The Training Officer® 2000 V3 will accept any alphanumeric code up to eight (8) characters in length.

If you intend to maintain a central training budget and not allocate the budget to the various divisions, each cost center must begin with the same two numbers.

An employee can only belong to 1 cost center at a time, however, with V3, there is a new feature called "Groups" which acts like a sub cost center. So a person can be part of the "Patrol" cost center, but also be part of the group "SWAT". This way, you can later enroll the entire SWAT team into a training class rather than picking them individually from different cost centers.

COST (*Work*) CENTERS

Let's assume the USA Police Department has four (4) major divisions: Administration, Field Operations, Services, Communications and units within each division as follows:

Administration Division	Field Ops Division	Services Division	Comm Division
Chief's Office	Patrol	Personnel	Day
Management/Budget	Day Shift	Training	Swing
Internal Affairs	Swing Shift	Records	Grave
Special Operations	Grave Shift	Day	
	Traffic Control	Swing	
	Phone Reporting	Grave	
	Animal Control		

Note: The Cost (Work) Centers method will enable you to generate any report on the system by any specific (work) unit identified in the Cost Center layout.

COST CENTER (*Work Center*) LAYOUT

Cost Centers may be used to setup and track budgeting type of information related to training. However, the use of an accurate cost center layout that reflects your organization will give you the added ability to generate reports concerning information directly related to a specific Cost (*Work*) Center.

The following illustrates three possible methods of assigning Cost center codes.

	<---------- Cost Center Codes ---------->				
Organizational Units	This	or	This	or	This
Administration Division	01		AD		AD
Chief's Office	011		ADA		AD1
Management/Budget	012		ADB		AD2
Internal Affairs	013		ADC		AD3
Special Operations	014		ADD		AD4
Field Operations Division	02		OP		OD
Patrol	021		OPP		OD1
Day Shift	0211		OPPD		OD11
Swing Shift	0212		OPPS		OD12
Grave Shift	0213		OPPG		OD13
Traffic Control	022		OPT		OD2
Phone Reporting	023		OPR		OD3
Animal Control	024		OPA		OD4
Services Division	03		SV		SD
Personnel	031		SVP		SD1
Training	032		SVT		SD2
Records	034		SVR		SD3
Day	0341		SVRD		SD31
Swing	0342		SVRS		SD32
Grave	0343		SVRG		SD33
Communications Division	04		AC		AC
Day	041		ACD		AC1
Swing	042		ACS		AC2
Grave	043		ACG		AC3

The first two characters of the Cost (*Work*) Center Codes are designated as the Divcode. In the above examples, the *Divcode* for the Administration Division is 01 or AD, the Operations Division 02 or OP, the Services Division 03 or SV and the Communications Division 04 or AC. Any combinations of letters and numbers may be used to create a *Divcode* or Cost (*Work*) Center Code.

RESERVE FUND ACCOUNT(S)

One cost center is already established on the system when you received The Training Officer® 2000 V3 program from Sierra-Pacific Software. That Cost Center is the Reserve Fund Account(s) (RFA). The RFA account(s) can be used to track any additional budget activity within the organization that is not tracked in the regular organizational cost centers.

BEGINNING BUDGET INFORMATION

After you have entered all the beginning budget information, you should print the Organizational Budget and the Cost Center Budget report in the Reports Module to check for any errors.

PRIOR EXPENDED AMOUNT

The Prior Expended Amount tracks any expended amounts for the current budget period for training that took place prior to the installation of the program. This can be handled through the division level only.

Example:

> The current budget period began on July 1 and The Training Officer® 2000 V3 was installed on October 1. The amount expended for training between July 1 and October 1 could be recorded in the Prior Expended Amount field by using one of the following options.
>
> You elect to record the prior expenditures at the division level. The amount is entered in the Prior Expended Amount for each division.
>
> The amount expended by Administrative Division (01) for this period was $300.00. This amount would be entered in the Prior Expended Amount field. This amount will be subtracted from the total training budget by the system. This is the entire amount for the division and not for the individual cost centers in that division.

Introduction to
The Training Officer® 2000 V3

RESERVE FUND ACCOUNT(S)

One cost center is already established on the system when you receive the program from Sierra-Pacific Software. This is the Reserve Fund Account(s) (Divcode 99). The (99) account(s) may be used to track any miscellaneous charges and/or reimbursements.

BEGINNING BUDGET INFORMATION... Verification

When all beginning budget information has been entered, you should print the Organization's Budget and Cost Center Listing found in the Reports Module and double check your figures for any errors.

Summary

Let us review the crucial steps that are necessary to prepare your organization for The Training Officer® 2000 V3.

1. Set up your Cost (*Work*) Center Scheme and enter it on the system.

2. Optional... Enter the budget information you wish to track with The Training Officer® 2000 V3 Program.

The Training Officer® 2000 V3
Key Module Options Section

This section lists the Key module options available in
The Training Officer® 2000 V3 Program.

The Training Officer® 2000 V3
Key Module Options

Employee Module allows you to…

- Add or update employee information
- Delete an employee
- Change the supervisor for employees
- Change training priority information
- Change Priority Category Coding
- Change Instructor Areas
- Add, Edit or Print Employee Notes
- Rotate Work/Shift Assignments
- Enroll an employee into a course
- Add or update inventory items to an employee
- Attach certificates to an employee
- Attach a photo of the employee
- Quick print employee specific reports

Training Module allows you to add, change or delete...

- Course Information
- Attach lesson plans to courses
- Training session information
- Training vendors / sponsors
- Subjects or Categories
- Change courses to a different subject / category
- Process registrations (add training records)
- Update registrations (update training records)
- List courses by site location
- Count processed registrations
- Create / Add / Delete a Waiting List
- Print Registration Waiting List

Budget Module allows you to...

- Setup cost centers
- Allocate the training budget
- Transfer budget funds
- Record and track miscellaneous charges and reimbursements
- Reset the budget

The Training Officer® 2000 V3
Key Module Options

Reports Module allows you to access...
- Employee Reports
- Courses and Vendors Reports
- Registration Reports
- Budget Reports
- Department Reports

Inventory Module allows you to...
- Add materials item purchased
- Update information for material items
- Delete any material items on the system
- List all material items on the system
- List employees / location assigned specific material items
- Issue a consumable item and maintain an inventory count
- Add consumable items to the system
- Change consumable information item status
- List all employees / locations issued a consumable supply item and inventory counts of each item
- Tracks all consumable items issued to an employee
- Tracks all employees / locations issued a particular item

Message Center allows you to...
- Add a message to appear on a specified date
- View and address automatically generated program reminders or tasks
- Edit any messages on the system
- Delete a message
- Postpone a message or alert

Options Module allows you to…
- Change any system information
- Change the text of various memos and letters
- Customize program data fields
- Create standardized drop down menus
- Change password
- Update agency information
- Turn the budget function on or off
- Turn the message center on or off

Employee Module
Options

Add a New Employee: Adds a new employee to the system. A new wizard will help you through this if you choose.

Update Employee Information: This allows you to change the employee's personnel profile information.

Delete an Employee: Removes **ALL** employee information from the system. **(NOTE**: you should be very certain you wish to delete an employee and their information permanently before doing so).

Certificates: This lets you record an employee’s achievement certificates and attach an electronic copy or document representing the certificate.

Education: This lets you add education credits to an employee through a new feature without having to enroll them into a course first. You can even specify the school, major and degree level.

Special Skills: This lets you record an employee’s special skills or “expert-witness” qualifications.

Instructor Qualification: This option will enable any employee to be designated qualified to instruct in any training category that is on the system.

Priority Information: This lets you change or edit training priorities for an employee or change the training priority coding.

Notes: This lets you add, edit or print any information you wish to track by specific employee or by topic title.

Batch Update: This allows you to update any combination of employees training profiles at once.

Training Module
Options

Add a New Course: This option lets you enter a new course. You need to identify the appropriate Category Code and the Vendor Number. If the vendor has not been added to the system, you can also add the vendor in this option (see the Course Procedure). A new Wizard will walk you through step by step procedures.

Edit a Course, Locations & Dates: This option allows you to change the course information, session information or add new sessions for the course (See the Course Procedure). A new feature now allows you to choose to back date previous course sessions with your updated information, or start your new changes for only future registrations. Also, the sessions no longer disappear after 90 or 120 days. The sessions will always be there but are now controlled by a view filter which allows you to choose the span of time you want to view past sessions.

Delete a Course: This option allows you to delete a course totally from the system (See the Course Procedure).

Vendor: This allows you to add a new vendor to the system, change a vendor's information or totally delete a vendor from the system (see the Vendor Procedure).

Course Subject / Category Info: This allows you to put new subjects and categories into the system or change an existing subject or category (see Subject and Category Procedure).

Course Code Transfer/Merge: This allows you to move a course from one Category to another. This option transfers one or more courses when a course is entered under the wrong category or when a new category is added (see the Course Code Transfer Procedure and Category Procedure). You can also now merge two courses, subject categories or subjects together if you inadvertently duplicate your records.

Add Course Registrations (Add New Training Record): This option allows you to enroll as many employees in a course as you desire. If the course information or employee information has not previously been added to the system, you can do so from this section. You can also print EMPLOYEE NOTIFICATION MEMOS, SUPERVISOR FOLLOW-UP EVALUATIONS, and VENDOR LETTERS (see the Registration Procedure).

Update course Registrations (Update Existing Training Records): This option updates the registration information for a specific course (see the Registration Procedure).

Delete Course Registrations: This allows you to remove the registration (Training Record) for a single employee when the attendance status has not been confirmed. This restores to the training budget all budgeted monies allotted for the course (see the Registration Procedure).

Find Courses by Name or Location: This shows you all of the training sessions by name, training location, Category code, or any combination of these.

Count Processed Registrations: This allows you to count the number of registrations processed between two selected dates.

Course Waiting List: This option allows you to establish, edit or delete any number of waiting lists for employees wishing to enroll in a particular course. At the time of enrollment the attendee will be deleted from the appropriate waiting list. You may also delete an entire waiting list. You may also print the waiting list for any particular course, including the total number on the list.

Budget Module
Options

Division & Budget Information: This option establishes major divisions in your organization and lets you change the beginning training and travel budget figures for each division (see the Glossary – Divcode and Cost Center Procedure).

Cost Center Information: This option allows you to enter or change cost center information. It also allows you to delete cost centers that have no funds expended for them (see the Cost Center Procedure and Glossary - Cost Center).

Division Budget Transfer: This option transfers allocated funds from one major division to another (see the Budget Transfer Procedure).

Cost Center Budget Transfer: This option transfers allocated training or travel funds from any cost center to any other cost center (see the Budget Transfer Procedure).

Reset the Budget: This option resets budget figures for all divisions and cost centers and then allows you to enter the new budget figures for all divisions and cost centers (see Budget Reset Procedure).

Option 6 - Misc. Charges / Reimbursements: This option enables you to track any charge or reimbursement for any cost center established in the "99" Cost Center Section.

The Training Officer® 2000 V3
Key Reports

The following menu options are accessed from the Reports Module.

Employee Reports will allow you to print...

- Profile and training priority information
- Location listing by work unit
- Individual's Training History including Weapons Qualification
- Monitoring of Certification Train/Retrain renewal dates for all courses designated for mandated continuing compliance
- Position Rank / Title Summary
- Employee listing by supervisor
- Listing of all supervisors
- Employee listing by years employed and age
- Home and Work Telephone roster

Course and Vendors Reports will allow you to print...

- A summary of all training costs per course
- The Training Subject-Category (Classification) Listing
- All classes for a particular vendor
- Information concerning a specific course
- A complete listing of all vendors on the system
- Training calendar

Registration Reports Menu will allow you to obtain...

- The Master Training Plan grouped in priority order
- Prioritized Training Plan ranked in order of frequency requested within the organization
- A total picture of all the training activity within the dates specified and appropriate recertification dates
- A listing of all employees requesting training in a specific training category
- Listing of External and In-House Trainers for a Category area of instruction
- A total picture of all the training activity within the dates specified
- A follow-up memo to employees requesting attendance status for a specific class
- A reprint of any training memos and vendor letters for a particular course registration
- A course roster of all employees that have requested training for a specific course to be offered and meeting a stated training need as identified on the employee's training profile

The Training Officer® 2000 V3
Key Reports

Budget Reports will allow you to print...

- The status of the organization's training budget
- Training cost by cost center number and work unit
- Summary of training cost by cost center and work unit
- Detailed training budget report by cost center
- Listing of all Cost Center on the system
- Listing of all Miscellaneous Charges / Reimbursements

Department Reports will allow you to print...

- Confidential Personnel information as listed in the employee's profile data
- Complete in-service and college training histories and/or a minimum hours compliance "exception" report
- The department's master schedule
- Continuing log of training (in-service & college) in date order

Employee
Related Reports

Employee Profile Information (Basic): This report lists the basic cost center related information tracked on the employee's personnel profile.

Employee Profile Information (Enhanced): This enhanced report lists much of the information tracked on the employee's personnel profile.

Personnel Statistics: This option's three sub-reports print various statistical listings such as employee locations, minority status, etc.

Employee Training History List: This report lists the complete training history for an employee for the current budget period or entire period on the system, including range training by weapon serial number.

Employees needing recertification by a specific date

Employee Certification List: This report checks for individuals who have been certified in a particular course and need to be recertified (e.g. CPR training). This option only works when there is a sufficient training history on the system to allow the program to check the length of the certification period in relation to the date the course will be offered.

Position Rank / Title Summary: This report prints the number of individuals for each position rank / title.

Supervisor / Employee Listing: The Supervisor Listing report lists all of the supervisors by management level. You can specify a specific management level or any individuals with any management level. The Employee Listing report prints all of the employees, their cost centers and work locations for a supervisor. You can specify a single supervisor or all supervisors.

Seniority & Age Listing: This report lists employees by employment number, name, work location, years employed with the organization and age. This report can be obtained in alphabetical or employment date order.

Print Phone Roster: This report prints in alphabetical order the employee's name, home and work phone number, work location, and division.

Rebuild Training Hours / College Credits: This option recalculates all employees' training hour & college credit totals in the event that this information becomes corrupted.

Course / Vendor Related Reports

Course Cost Expense Summary: This report prints the course title, the course code, number enrolled, and the total costs for each course. This report can be printed for a single vendor or for all vendors (See the Glossary - Course Code).

Print Subject / Category List: This lists all of the subjects and/or categories on the system in alphabetical or numeric order.

Print All Courses for a Subject or Category: This report prints all of the information for courses within a specific training subject or category.

Print All Courses for a Vendor: This report prints all of the information for courses that are from a specific vendor.

Print Specific Course Data: This report prints all of the course data on the system for a specific course.

Print Vendor Information: This report prints out all vendors that are entered in the system in either alphabetical or numeric order.

Print All Courses: This report lists the course information for all courses on the system in alphabetical or numeric order.

Training Calendar: This lists all the course sessions available from one date to another.

Registration
Related Reports

Master Training Plan: This report lists in priority order the training categories and the projected training expenditures. These are based on the prioritized training needs for your organization. It is recommended that you print this report when targeting training to meet specific prioritized training needs. This might be done when training funding is a key factor. The report lists the costs based on the average course cost multiplied by the number of employees coded for that category. The report totals the projected cost for each priority and shows the grand total for all priorities.

Ranked Prioritized Training Plan: This report determines which categories are most requested from all the training priorities. It is recommended you print this report when you want to determine employee training needs without regard to the priority status. This could be used most effectively for in-house training or when the total numbers to be trained is a key factor. This report shows the projected training costs based upon the average course cost multiplied by the number of employees attending.

Category Priority / Trainer Lists: This report lists the priority information for a specific Category and Trainers. If desired, only the reason statement from the priority can be printed to assist the instructor in preparing the course content.
Certification Compliance Dates... Option 4

Course & Category Roster Listing: The Course Roster Listing prints all employees that have taken a specific course between two given dates. Appropriate RECERTIFICATION COMPLIANCE dates may be listed for designated areas of training.

Registration
Related Reports (continued)

Class Frequency Summary: This report prints the total training activities between two given dates. The report shows the course code, the course title, the average employee rating, the number of employees taking this course, and the last date the course was offered (see Glossary - Employee Rating).

Confirmation Follow-up Request: This is a reprint of the training confirmation memo requesting the employee to confirm their training status. It will also keep track of the number of follow-up requests sent (see the Registration Procedure).

Re-Print Training Memos & Letters: This is a reprint of the training memos, and vendor letters for either a single employee or all employees registered for a course.

Potential Course Roster: This report should be run prior to registering employees for training. The report lists potential attendees for the course based on their training priority Category code. You can select which of these will be listed. The report gives you the option of including employees that have already taken the course. You may also select to include the training priority reason statement. A box is provided next to the employee's name for the approving authority to authorize the training.

Budget / Cost Center Related Reports

Organizational Budget Report: This report shows the overall budget status for the entire organization. The report prints beginning balances, amounts transferred, amounts obligated or spent, and ending balances for each division for training and travel budgets. The report also prints an audit trail of all transferred funds (see the Budget Transfer Procedure).

Detailed Location Costs Report: This report can be printed for the entire organization or a single division. The report shows the number trained for each cost center, training and travel costs by course; summarizes training costs for each priority; total cost and numbers of prioritized and non-prioritized training; total number enrolled in training; total course and travel costs; total training budget; percent of training allocated or spent; and the percent of the budget period (see the Cost Center Procedure).

Summary Location Costs Report: This report can be printed for the entire organization or a single division. The report summarizes the number trained and the training and travel costs for each cost center. The report also summarizes training costs for each priority; total cost and numbers of prioritized and non-prioritized training; total number enrolled in training; total course and travel costs; total training budget; percent of training allocated or spent; and the percent of the budget period (see the Cost Center Procedure).

Cost Center Budget Report: This report shows the overall budget status for each cost center in a division. The report prints beginning balances, amounts transferred, amounts obligated or spent, and ending balances for each cost center for each cost center for training and travel budgets. The report also shows the total division budget, the total amount obligated or spent, and the ending balance for the division and prints an audit trail of all transferred funds (see the Budget Transfer Procedure)

Budget / Cost Center
Related Reports (continued)

List of All Cost Centers: This report prints a list of all cost centers in cost center order with the names of each cost center (see Glossary - Cost Center).

Misc. Charges & Reimbursements: This report lists Miscellaneous Charge(s) and Reimbursement(s) totals on the system for the current budget period.

Department Training Related Reports

Confidential Personnel Info: Prints the employee profile data including any instructional areas designated.

Personnel College Information: Prints the academic or college history for a single employee, cost center, or the entire organization.

Personnel Training Information: Prints the in-service training history and summary report of training hours for an employee, cost center, or the entire organization.

Print Combined Training Reports: This report combines the reports of Option 1, Option 2 and Option 3 into one report. It can be printed for a single employee, cost center, or the entire organization.

Print Department Master Schedule: This report lists the work location, days off and supervisor's name of each employee by Cost Center (Work Location). This report should be run after the Work Shift Assignment Rotation option has been performed.

Continuing Log of Training: This report lists the entire training and college history for the current budget period in date order. It is printed for Law Enforcement / Corrections Officers only.

Supervisor Follow-Up Evaluations: This report prints course rating forms employees use to rate a course so the agency may evaluate it for future training value.

Appendix A
Training Needs Assessment

Training Needs Assessment Program

NOTE: The following section is only a guide if your organization does not have a training needs assessment program in place and one is desirable. On the other hand, any needs assessment system can be accommodated by The Training Officer® 2000 V3.

The Training Officer® 2000 recommends a three (3) phase approach to set up a training needs assessment program:

Phase One - Position Skill Inventory

Phase Two - Needs Assessment

Phase Three - Priority Category Coding

If you will be using an alternate assessment procedure, you may want to implement the following POSITION SKILL INVENTORY in PHASE ONE and all aspects of PHASE THREE of this section.

PHASE ONE - POSITION SKILL INVENTORY

The training needs assessment cycle involves the use of the Employee Training Profile consisting of two forms, the POSITION SKILL INVENTORY and NEEDS ASSESSMENT. Samples of these forms are supplied with The Training Officer® 2000 V3. Feel free to use or modify these two forms to suit your organization's needs (see Appendix C - Sample Forms).

The first step in assessing the training needs of employees is the creation of a generic Position Skill Inventory for each type of position within the organization. The inventory should be specific, detailing the job skill requirements for each type of position. If your organization currently has position or job descriptions available, they can be used for this purpose or as an excellent source for developing the Position Skill Inventories.

NEEDS ASSESSMENT PROCESS

The needs assessment process begins with the use of the Position Skill Inventory. The inventory should contain the general or generic Knowledge, Skills and Abilities (KSA) that are generally required in all like positions utilized in the organization (e.g. the KSA's for a secretary, shipping & receiving clerk, auditor, etc.). At a later date, any unique (KSA) requirements can be added to the inventory on an individual basis.

Appendix B
Training Needs Assessment

The development of the Position Skill Inventory can also be accomplished on an informal basis. The employee and supervisor can incorporate the skill inventory activity concurrently with the training needs assessment process (see Appendix C - Position Skill Inventory form).

It is worth noting that once a generic Position Skill Inventory for each type of position has been created, the employees and management will have a means to add or delete any actual skills not required for that particular position. This activity will enable all concerned to identify the specific Knowledge, Skills and Abilities (KSA) required for each position in the organization.

Any KSA's not listed and required by a particular employee should be added to the skill inventory. Likewise, the KSA's not actually required by the employee should be deleted from the inventory.

By following this procedure, each employee will have a custom KSA inventory for their own position. Additionally, this procedure will provide each employee with a means to develop a personal training plan unique to their own position.

PHASE TWO - NEEDS ASSESSMENT

The second phase in assessing the employee's training needs involves the use of the Needs Assessment Form. This form provides a means to prioritize the training needs as noted on the Position Skill Inventory (see Appendix D - Employee Training Profile & Needs Assessment forms).

The Needs Assessment may be completed by the employee and supervisor working together. This activity involves the two parties agreeing on the top five (5) training priorities based on the ratings from the Position Skill Inventory. It should be noted that five (5) is the maximum number of training priorities that can be created at any one time for any individual. It is not mandatory that all five (5) priorities be established; in fact, no priorities need to be established if training is not required.

Priority "Reason" Statement

The Reason section in each priority is intended for use by the employee to explain the specific subject matter of the training requested and how the training will affect their job performance.

It is highly advisable that the supervisor and employee mutually agree on the training priorities from the Position Skill Inventory. This process may forestall any future misunderstanding as to the exact training needs that have been identified. This activity can also serve as the approval process for training at the supervisor level.

Appendix B
Training Needs Assessment

PHASE THREE - PRIORITY CATEGORY CODING

This phase is the process that links the training priorities with the appropriate training resources. The meaning and understanding of the terms SUBJECT and CATEGORY are critical to this process.

> *SUBJECT* denotes a broad area of training. The subject encompasses all training areas related to a general topic (e.g. MANAGEMENT).
>
> *CATEGORY* identifies a specific area of training within a subject area (and not a specific course). For example, New Supervisor Orientation would be coded under the Subject of Management. All training resources addressing topics concerning new supervisors would be coded under the New Supervisor Orientation Category.

Assess each priority and code it with the appropriate Category Code that matches the training priority objective. This process will group all like priorities in the same category. If the priority statement cannot be coded into an existing category, you may create a new Category (see Category Procedure). When this process is complete, the Needs Assessment Form will serve as the training plan for each employee. The accuracy of the coding process determines to what degree the training priorities are reflected in the Master Training Plan and the eventual match to available training resources.

The Master Training Plan and the Priority-Ranking reports are in the Registration Reports Menu.

As the profiles are returned for review, any trends for new categories may be incorporated into the existing category list. For example, an observation is made that several employees are requesting training appropriate for new supervisors. It is also noted that the category list does not contain any listing for new supervisors. At this point it is appropriate to create a new Category listing for New Supervisors. The title of the new category might be, New Supervisor Orientation, under the Subject of Management (see the Category Procedure). From this point on, all training priorities for new supervisors would be coded in this category code.

You may repeat this process each time a new grouping or trend for training is observed. Over a period of time, you will have created a category listing that will accurately reflect the training needs unique to your organization.

The Training Officer® 2000 may come with a generic listing of the most commonly used areas of training. The Subject and Category listing can be printed from Menu Option 2 in the Courses & Vendors Reports Menu.

Appendix B
Training Needs Assessment

To add or delete Subjects or Categories, review the Subjects and Categories Procedures in the Procedure Section. You will want to print and maintain a current listing of the Category Codes to maximize the identification of all category coding options for the training priorities.

Appendix C – Sample Forms
Position Skill Inventory

(Sample) Date: ___________

EMPLOYEE TRAINING PROFILE
POSITION SKILL INVENTORY

Employee: J. Doe Cost Center: 0101
Position: ________________________ Working Title: ____________________________
Work Location: Director's Office Supervisor: W. Alder

TO BE COMPLETED BY EMPLOYEE AND IMMEDIATE SUPERVISOR Listing/List of required skills for this position. Assess the need for training in each area listed; then rate the need for training from (1) low to (5) high.	TRAINING NEEDS EMPLOYEE Low High 1 2 3 4 5	 SUPERVISOR Low High 1 2 3 4 5
1. General office practice		
2. Arithmetic		
3. Communicate effectively and appropriately orally		
4. Communicate effectively and appropriately in writing		
5. Interpret program information in making work decisions		
6. Apply program information in making work decisions		
7. Supply information to others		
8. Organize own work efficiently		
9. Make appropriate decisions concerning work methods		
10. Maintain complex, specialized records		
11. Prepare narrative reports based on records		
12. Prepare statistical reports based on records		
13. Typing		
14. Training others		
15. PC Computer		

Employee Signature Date Supervisor Signature Date

Appendix D – Sample Forms
Needs Assessment

(Sample) Date: ___________

EMPLOYEE TRAINING PROFILE
NEEDS ASSESSMENT

Employee:____ Cost Center:_________
Position:__________________________ Working Title:____________________________
Work Location:______________________________ Supervisor:______________________

COMPLETED BY EMPLOYEE AND IMMEDIATE SUPERVISOR
After completing the Employee / Position Skill Inventory,
identify and prioritize the top five training needs.

PRIORITY #1 Statement: ____ Category Code: __________

REASON Statement: ____
____
____

PRIORITY #2 Statement: ____ Category Code: __________

REASON Statement: ____
____
____

PRIORITY #3 Statement: ____ Category Code: __________

REASON Statement: ____
____
____

PRIORITY #4 Statement: ____ Category Code: __________

REASON Statement: ____
____
____

PRIORITY #5 Statement: ____ Category Code: __________

REASON Statement: ____
____
____

Employee Signature: ___________________________ Supervisor Signature: __________________________

Creating and Editing Division Codes / Cost Centers and their associated Budgets:

Overview:

Establishing Cost Centers for your organization must be performed before any other information can be added to the system. When this operation has been completed, you can then add your employees to the system.

The first two characters of the code will designate the Division Code. The following is a sample Division and Cost Center Code listing:

Cost Center Codes Organizational Units

Name:	Opt 1	Opt 2	Opt 3
FIELD OPERATIONS	40	FO	F1
TEAM I (DAYS)	*401*	*FOI*	*F1I*
SQUAD A 0600-1600 HRS	*4011*	*FOIA*	*F1IA*
SQUAD B 0800-1800 HRS	*4012*	*FOIB*	*F1IB*
TEAM II (SWING)	*402*	*FOII*	*F1II*
SQUAD A 1300-2300 HRS	*4021*	*FOIIA*	*F1IIA*

A typical Law Enforcement Cost Center scheme might be set up as follows:

Below is an example of the Office of the Chief Division. (10) would be the Division number with all work centers (Cost Centers) that comprise the Chief's Division starting with 10 (ie., 101, 102, 103, etc.)

COST CENTER NO.	NAME OF WORK LOCATION
10	EXECUTIVE ADMINISTRATION
101	OFFICE OF THE CHIEF
102	MANAGEMENT AND BUDGET
103	INTERNAL AFFAIRS
104	SPECIAL OPERATIONS GRP

This process is repeated for each major division within your organization. Below is the Services Division.

20	SERVICES DIVISION
202	PERSONNEL AND TRAINING
203	PROPERTY CONTROL
205	RECORDS UNIT
2051	DAYS

2052	SWING
2053	GRAVEYARD

This process is then repeated for the Communications Division.

U	COMMUNICATIONS DIVISION
301	DAY SHIFT
302	SWING SHIFT
303	GRAVEYARD SHIFT

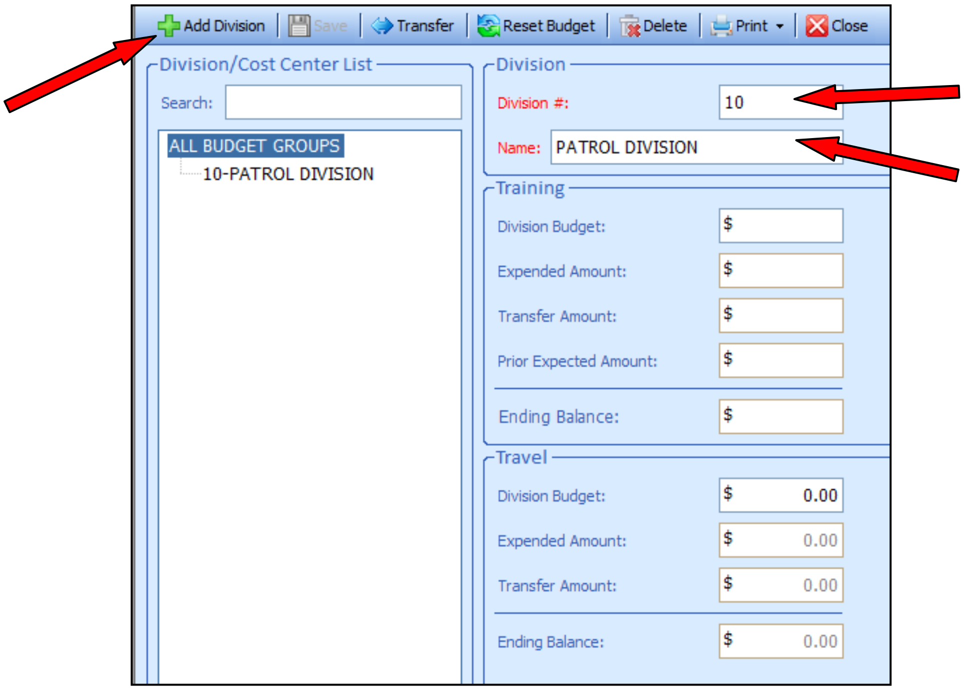
As you see here, many levels can be established to reflect the division structure. Since Squad A 0600-1600 HRS is directly responsible to Team I (401), that Cost Center (4011) begins with the Cost Center Number for Team I.

40	FIELD OPERATIONS DIVISION
401	TEAM I (DAYS)
4011	SQUAD A 0600-1600 HRS
4012	SQUAD B 0800-1800 HRS
4013	SQUAD C 0800-1800 HRS
4014	SQUAD D 0600-1600 HRS
402	TEAM II (SWING)
4021	SQUAD A 1300-2300 HRS
4022	SQUAD B 1600-0200 HRS
4023	SQUAD C 1600-0200 HRS
4024	SQUAD D 1300-2300 HRS
403	TEAM III (GRAVEYARD)
4031	SQUAD A 2000-0600 HRS
4032	SQUAD B 2200-0800 HRS
4033	SQUAD C 2200-0800 HRS
4034	SQUAD D 2000-0600 HRS
404	TRAFFIC CONTROL UNIT
405	PROACTIVE OPERATIONS
406	TELEPHONE REPORTING
407	ANIMAL CONTROL UNIT
408	OPERATIONAL SUPPORT SEC

50	P & I DIVISION
501	CRIMINAL INVESTIGATIONS
502	SCHOOL LIAISON
503	COMMUNITY SERVICES
504	CRIME PREVEN & VOL SERVICES

<u>Procedure:</u>

Open the "Budget" Module from the Home Screen. Click "Add Division" on the menu bar at the top of the Budget Module window.



The system will automatically assign a sequential Division #, however, you can manually change this, <u>but</u> you must do so before you save it. Once you save it, it cannot be changed unless you delete it and start over. Also, type in the name you want for the Division Code. These division codes and names should mimic your agencies organizational structure.

The procedure is the same for adding cost centers. To add a cost center under a division, simply click on which division you want to add the cost center to, and then click the "Add Cost Center" button from the menu bar on top of the Budget Module window.

When creating your divisions, you can also specify their budget balances. You can later transfer money between divisions or cost centers using the "Transfer" button on the menu bar at the top of the Budget Module window. To put money into a cost center, you must first add a dollar amount the division, and then transfer whatever dollar amount to a specific cost center within that division. You cannot transfer dollar amounts from one division to a cost center in another division. You would have to transfer the money from one division, to another division and then to the cost center.

The budget will automatically reset itself based on your budget cycle you set up in the options module. You can also manually reset the budget at any time.

Adding, Editing, Deleting Employees:

Overview:

In the Employees Module, you can manage all of your employees in one place. You can add, edit or delete an employee as well as add, edit or delete a large quantity of information regarding a specific employee including; education, certifications, special skills, instructor qualifications etc.

Procedure:

Add a New Employee: When adding a new employee, you may choose to either run the Add New Employee Wizard or enter the information manually. The Wizard is turned on by default. To stop using the Wizard, go to the menu bar at the top of the Employee Module screen. Click the down arrow next to the "Add Employee" button and de-select "Use Wizard"

Note: *The Wizard is designed to walk you through the process step by step to ensure standardization and prevent information omissions.*

Enter the desired information concerning each employee in your organization. The items that you deem absolutely necessary are customizable in the Options Module: It's suggested that Employee Name, Cost Center, Race, Sex, "Sworn" status, Date of Birth and SSN # are mandatory. The software will allow you to type in several identifying numbers for any given employee. Not all are mandatory but it is recommended you remain consistent. IE: Employee # could be the employee's payroll number. ID# could be customized in the Options Module to be DPSST (unique to Oregon), TCLEOSE (unique to Texas) or POST # (unique to other states such as California). Dept # could be the employee's radio or badge #.

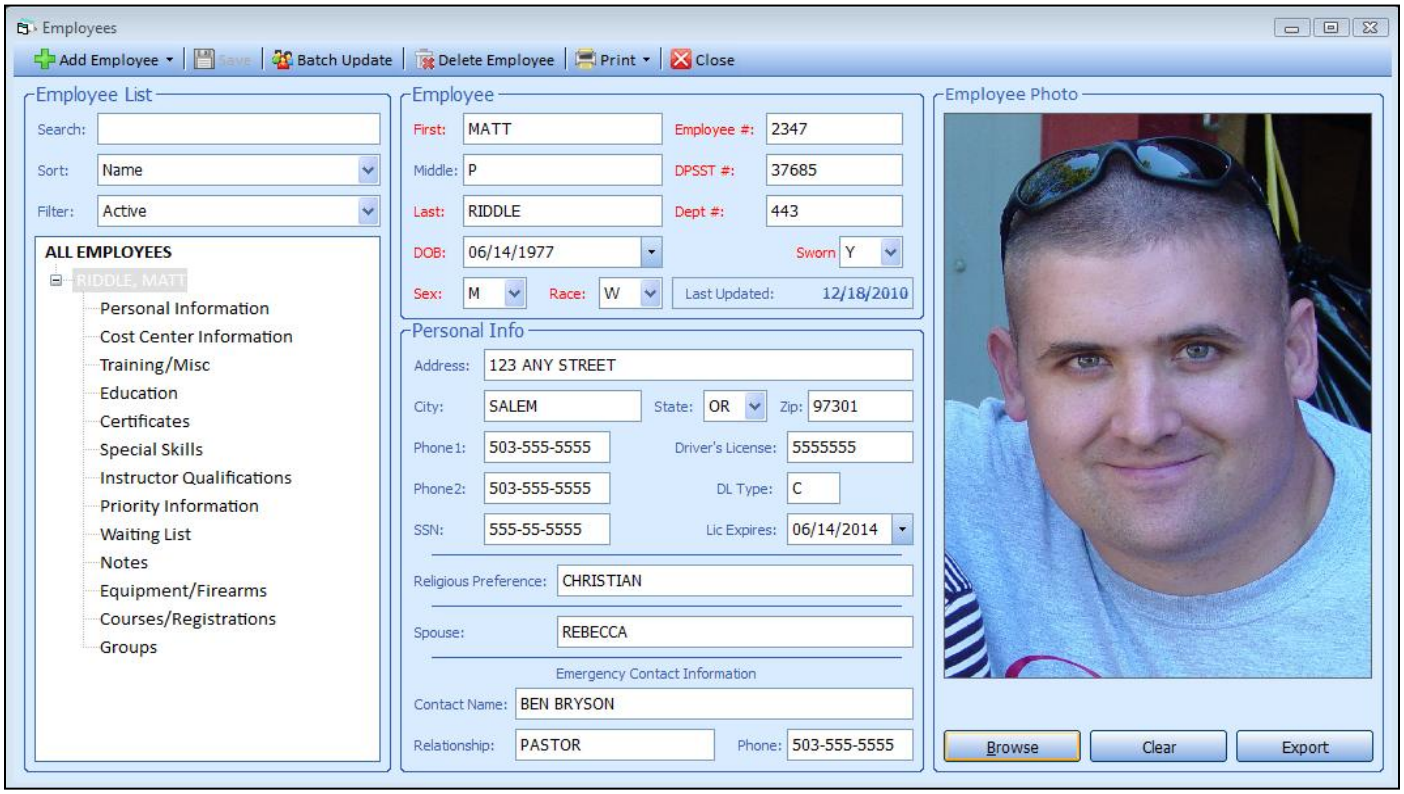
Note: *When entering a new employee 'manually', the system will initially only give you three headings in that employee's tree view to enter information into until you click "Save" Once you click "Save", the rest of that employee's headings appear under their tree view and you will then be allowed to fill that information in.*

3. Verify that the information is correct and click "Save"

Update Employee Information: Change all information necessary for any given employee or group of employees using the "Batch Update" feature on the top menu bar of the Employees Module. You can sort the list of employees by Name, Cost Center, Type, Group, ID Number, Employee Number or Department Number. You can even filter the list visible to you by Active Employees, Inactive Employees or ALL employees. (See also "Batch Update")

Access the Employees Module and select an Employee from the tree view. Edit and click “Save”

Delete Employee: This option allows you to delete any employee whose attendance status for training courses has been confirmed. You cannot delete an employee that has courses which have not had the registration process completed. You will need to finish entering the attendance status information for all of the employee's training courses before you can delete that employee from the system. Access the Employees Module and select the Employee you want to delete. Click “Delete Employee” from the top menu of the Employees Module. Verify you really want to do this as it cannot be undone.



Adding, Editing, Deleting; *Education, Certificates, Skills, Instructor Qualifications, Priorities, Waiting Lists, Notes, Groups & Batch Updating:*

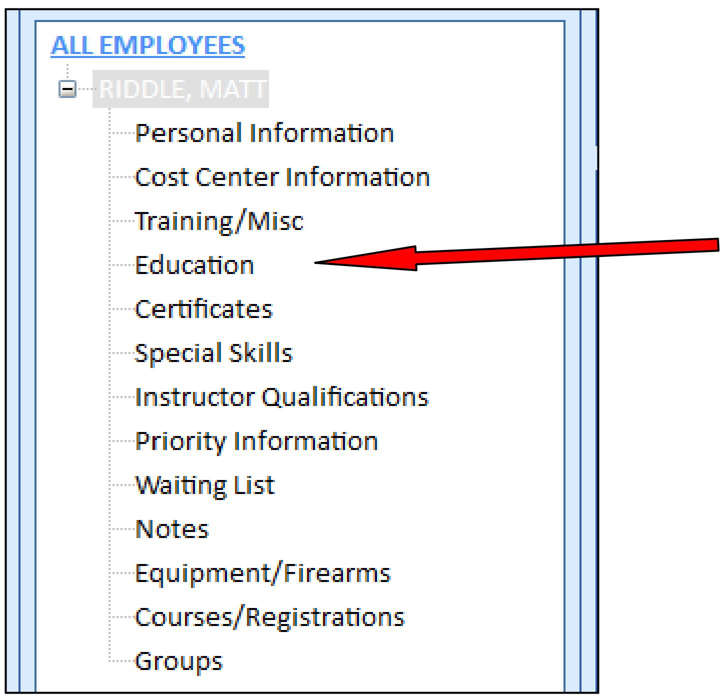
Education:

Overview:

Adding education to an employee is now done manually in the employee profile. You no longer need to enroll an employee into a "Prior Approved College" course to give them education credit.

Procedure:

You can access the employee education information in the Employees Module. In a given employee's profile, you can click the "Education" heading in their tree view.



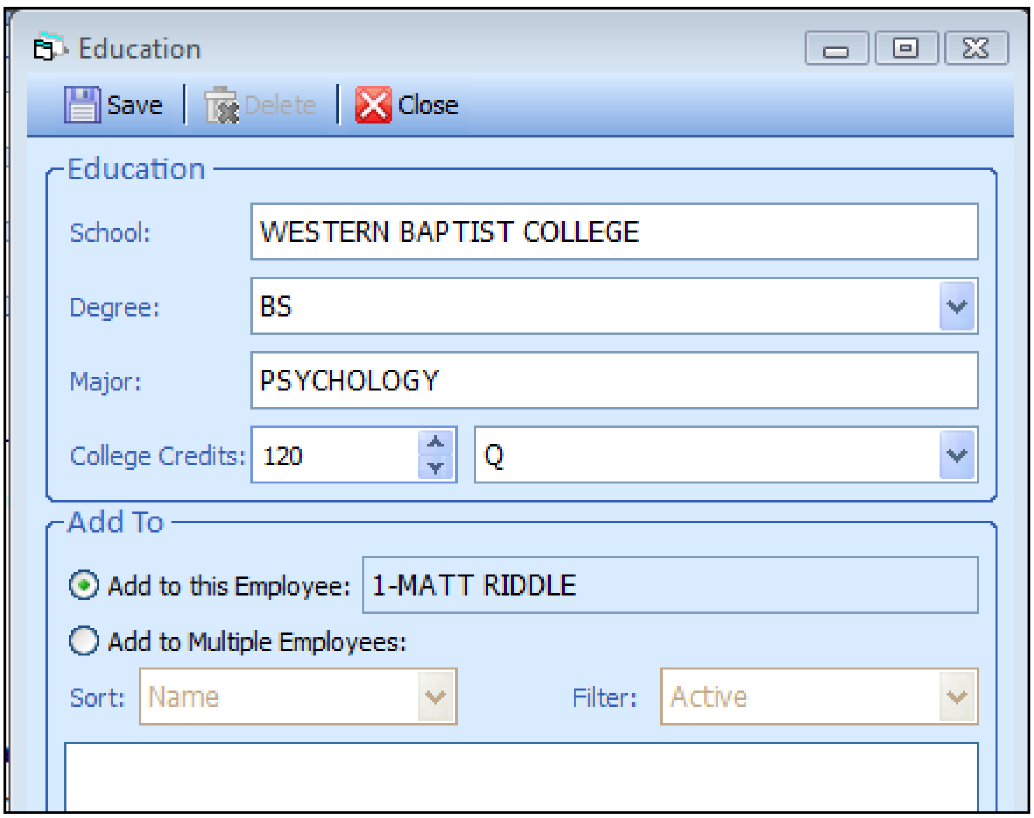
2. From here, you can either view existing Education credits or add new education credits.

3. To view an existing education credit, simply double click on that line item heading in the display window to the right of the tree view. To add a new education credit, click "Add Education" from the menu bar at the top of the Employees Module window.

4. When you click the “Add Education” button, a new window will appear asking you to enter information. First, manually type in the name of the school in which you are crediting the employee. Next, choose a degree type from the drop down menu. These degree types can be added to or modified in the Options Module. This drop down menu is designed to maintain standardization throughout the program. If you don’t see an appropriate heading in the drop down, you may add one at that time by selecting “Add Item” at the bottom of the drop down menu.

5. Once you have selected or added a heading, then manually type in the major in which the credits were earned toward. (This is optional).

6. Now enter the number of credit hours for the employee and specify whether they are quarter hours or semester hours. Click “Save”.



Certificates:

Overview:

The Employee Certificate Option is used to track any Certificates obtained that are directly related the employee's official position.

Note: *This option does not take the place of enrolling an employee into a course to credit them with training hours; it is simply to document an achieved certificate for either a certification in a field or a certificate of completion upon returning from a training course. You can even attach an electronic copy of the actual certificate in any file format such as PDF or Word.*

Procedure:

You can access the employee certificate information in the Employees Module. In a given employee's profile, you can click the "Certificates" heading in their tree view.

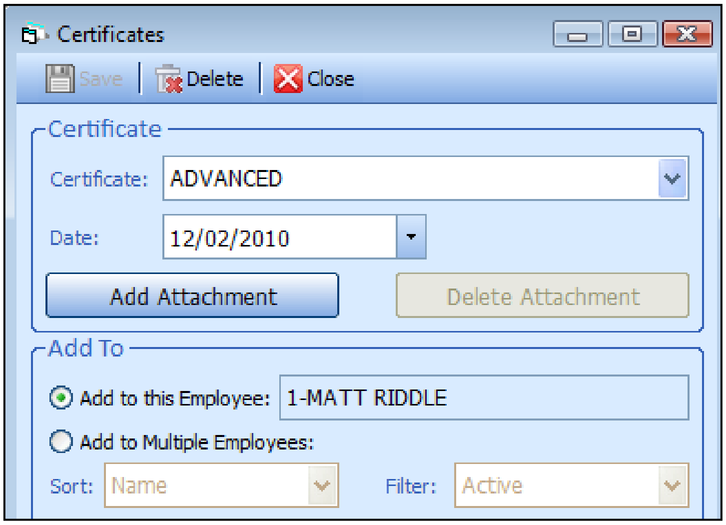
1. From here, you can either view existing Certificates or add a new certificate.

2. To view an existing certificate, simply double click on that certificate's heading in the display window to the right of the tree view. To add a new certificate, click "Add Certificate" from the menu bar at the top of the Employees Module window.

3. When you click the "Add Certificate" button, a new window will appear asking you to enter information. You must choose a certificate name from a drop down menu. This drop down menu is designed to maintain standardization throughout the program. If you don't see an appropriate heading in the drop down, you may add one at that time by selecting "Add Item" at the bottom of the drop down menu. You can set these drop down headings up ahead of time in the Options Module.

4. Once you have selected or added a heading, then add a date. Click the save button on the menu bar at the top of the add certificate window. Once you have saved the record, the "Add Attachment" button will appear below your newly added heading. This is where you can upload the electronic copy of the certificate. After you upload the file, click "Save" again. You have now added the certificate.

You can add this certificate or any other certificate to either the employee you have selected or to multiple employees, groups of employees or entire cost centers all at the same time from this window. To add to more than one employee or to a group of employees, select the "Add to Multiple Employees" radio button toward the middle of the window. By default, the "Add to this Employee" radio button is selected which will add that skill to the current employee you are up-dating. Once you have selected the "Add to Multiple Employees" radio button, you can filter the employees by name, cost center, group etc then select the check boxes of which employees you want that specific certificate added to. Click “Save”.



Skills:

Overview:

The Special Skills Option is use to track any Skill or Competency that an individual possesses. The skill(s) are those which may be useful to the organization and may be outside the particular job requirement of his/her official job description.

Procedure:

1. You can access the employee special skill information in the Employees Module. In a given employee’s profile, you can click the "Special Skills" heading in their tree view.

2. From here, you can either view existing Special Skills or add a new skill.

3. To view existing skills, double click on that skill’s heading in the display window to the right of the tree view. To add a new skill, click “Add Skill” from the menu bar at the top of the Employees Module window.

4. When you click the “Add Skill” button, a new window will appear asking you to enter information. You must choose a skill heading name from a drop down menu. This drop down menu is designed to maintain standardization throughout the program. If you don’t see an appropriate heading in the drop down, you may add one at that time by selecting “Add Item” at the bottom of the drop down menu. You can set the drop down headings up ahead of time in the Options Module. After choosing a heading, add a date and click save. You have now just added a special skill.

Note: *You can add this skill or any other skill to either the employee you have selected or to multiple employees, groups of employees or entire cost centers at the same time from this window. To add to more than one employee or to a group of employees, select the "Add to Multiple Employees" radio button towards the middle of the window. By default, the "Add to this employee" radio button is selected which will add that skill to the current employee you're working with. Once you've selected the "Add to Multiple Employees" radio button, you can filter the employees by name, cost center, group etc then select the check boxes of which employees you want that specific skill added to. Click "Save".*

Instructor Qualifications:

Overview:

The Instructor Qualifications information can be especially useful when in-house training is an option. You will be able to obtain a listing of the qualified in-house instructor(s) and employees requesting training in a specific area.
If the area of expertise for a qualified instructor is not in the system, you will need to add it in the Training Module first. Upon completion of entering an employee's profile information, you will have the option to indicate any training topics in which the individual is qualified to instruct.

Procedure:

1. You can add an Area of Instruction for an employee in the Employees Module.

2. In the Employees profile tree view, select the "Instructor Qualification" heading. Then click the "Add Qualification" button on the menu bar at the top of the Employee Module window.

3. When you click "Add Qualification", a window will appear. From top to bottom in this window, you will see two drop down menus. Starting from the first drop down menu, select the desired Subject, Subject Category, or Course you want to associate with the employee. By choosing one of these options first, you are either giving the employee a broad scope of instruction or narrow scope of instruction based on their qualifications. For example, an employee may only instruct a specific firearms course but not all firearms courses. If this is the case, you would select "Course" in the first drop down menu. If the employee instructs every single use of force skill, then you would select "Subject" from the first drop down menu. The second drop down menu will give you different options to choose from based on what you chose in the first drop down menu. If you select "Subject" on the first drop down then the second drop down will only list available Subjects from which to choose. The same is true with choosing "Subject Category or Course". Once you make your selection in the second drop down menu, the third box will auto-populate the information.

Note: *You can add an Instructor Qualification to either the employee you have selected or to multiple employees, groups of employees or entire cost centers at the same time from this window. To add to more than one employee or to a group of employees, select the "Add to Multiple Employees" radio button toward the middle of the window. By default, the "Add to this employee" radio button is selected which will add that qualification to the current employee you are working on. Once you have selected the "Add to Multiple Employees" radio button, you can filter the employees by name, cost center, group etc then select the check boxes of which employees you want that specific Instructor Qualification added to. Click "Save".*

Priority Information:

Overview:

The training priorities for an employee are the ranked assessment of the employee's training needs. The system automatically chooses the next available number for the priority; the numbers are not associated with the sequence of their importance. The sequence of importance will need to be maintained in the comments section. Each priority must be assessed and categorized to correspond to a training Subject, Subject Category or specific Course that is in the system. If the priority does not fit into an existing category a new one should be created in the Training Module. Each priority may also have a comment statement which is a place to make notes about why this is a priority, IE: Result of employee evaluation or result of disciplinary action (work plan). This is intended to better target the training by explaining the specific subject matter of the training. The statement comment may also explain how the employee expects the training to improve job performance.

For example, an employee's training priority number two (2) addresses "Time Management". The steps below detail the recommended procedure to code the training priority and the eventual match of the training resource.

Procedure:

1. Assess the training need for each training priority.
2. Review the Reason Statement (if any) for content.
3. Code the training priority with the appropriate Subject, Subject Category or specific Course which matches the subject content of the training need. Some priorities may be satisfied by a variety of courses within a certain Subject Category and some priorities may only be satisfied by a specific course. This is user defined.

This process links the training need with the appropriate training resource and can be later reconciled when enrolling the employee into a training course which matches or meets the priority need.

You must select the type of training resource the priority applies to, IE: Subject, Subject Category or Course. Next, you must select the actual resource, IE: only the resources specific to the type you selected will be selectable. Lastly, you will need to type in some priority comments. These can be elaborate or simple, such as “Employee needs to improve on their driving skills, this priority must be met by next year per their annual evaluation.”

Waiting Lists:

Overview:

This allows you to place selected employees on a course waiting list. When enrolling for the course at a later date, you will be prompted there are employees waiting to take the course. You can place someone on a waiting list for a general Subject, Subject Category or a specific course.

Procedure:

Go to the Employees Module and navigate to the employee you would like to put on a waiting list. Expand their tree view and select the Waiting List heading. Click the “Add Waiting List” button on the menu bar at the top of the Employee Module window. A window will appear and ask several things. First, select a Subject, Subject Category or Course from the drop down. Then select the appropriate training resource in the next drop down. Select the date you are entering them on the waiting list (note, the date field is not the date of the course, but rather the date you are making the entry). Indicate whether you want to add just the employee you are working on to the waiting list or select multiple employees. Click “Save”

Notes:

Overview:

Using the Notes information section, you can track any miscellaneous information by specific employee or by topic title. The Notes option is used to track any miscellaneous information regarding an individual. The Notes are those which may be useful to the organization such as a date which an employee was transferred from one division to another, promotions, resignation, terminations, disciplinary action etc.

Procedure:

1. You can access the employee Notes information in the Employees Module. In a given employee’s profile, you can click the “Notes “heading in their tree view.

2. From here, you can either view existing Notes or add a new Note.

3. To view any existing Notes, simply double click on the Note heading you wish to view in the display window to the right of the tree view. To add a new Note, click “Add Note” from the menu bar at the top of the Employees Module window.

4. When you click the “Add Note” button, a new window will appear asking you to enter information. You must choose a Note heading name from a drop down menu. This drop down menu is designed to maintain standardization throughout the program. If you don’t see an appropriate heading in the drop down, you may add one at that time by selecting “Add Item” at the bottom of the drop down menu. You can set this drop down heading up ahead of time in the Options Module. After choosing a heading, add a date and click save. You have now just added a Note.

Groups:

Overview:

There are times when an employee who is in a certain cost center, is also part of a special unit, team or group comprised of other employees in different cost centers. The need may arise to enroll that entire group into a training course. Rather than having to search the different cost centers to pick out the individual employees, you can add those employees to special groups. These groups act like a sub cost center. IE: An employee may be part of patrol, but is also on the SWAT team. You can simply enroll the entire SWAT team into a course all at once and not have to select them one by one out of their respective cost centers.

Procedure:

1. You can access the employee Group information in the Employees Module. In a given employee’s profile, you can click the “Groups “heading in their tree view.

2. From here, you can either view existing Groups or add a new Group.

3. To view an existing Group, simply double click on that Group’s heading in the display window to the right of the tree view. To add a new Group, click “Add Group” from the menu bar at the top of the Employees Module window.

4. When you click the “Add Group” button, a new window will appear asking you to enter information. You must choose a Group heading name from a drop down menu. This drop down menu is designed to maintain standardization throughout the program. If you don’t see an appropriate heading in the drop down, you may add one at that time by selecting “Add Item” at the bottom of the drop down menu. You can set this drop down heading up ahead of time in the Options Module. After choosing a heading, add a date and click save. You have now just added the employee to the Group. Later, you can sort by “Group” instead of cost center and enroll or batch update everyone belonging to that group.

Batch Update:

Overview:

You can update multiple employees' information using this feature. You can update all or some of the following all at once: Cost Center, Rank, Days off, Shift, Work Phone, Supervisor's name, work location and Supervisor's rank.

Procedure:

Click "Batch Update" from the menu bar at the top of the Employees Module window. First, at the bottom of the window that will appear, select the employees or group of employees you want to apply the changes to. Then, make whatever changes above in the fields and click "Save".

Note: *There is no undo button, so if you make a change, you will need to remember what change you made to change it back in case you made a mistake.*

Creating, Editing, Deleting Vendors:

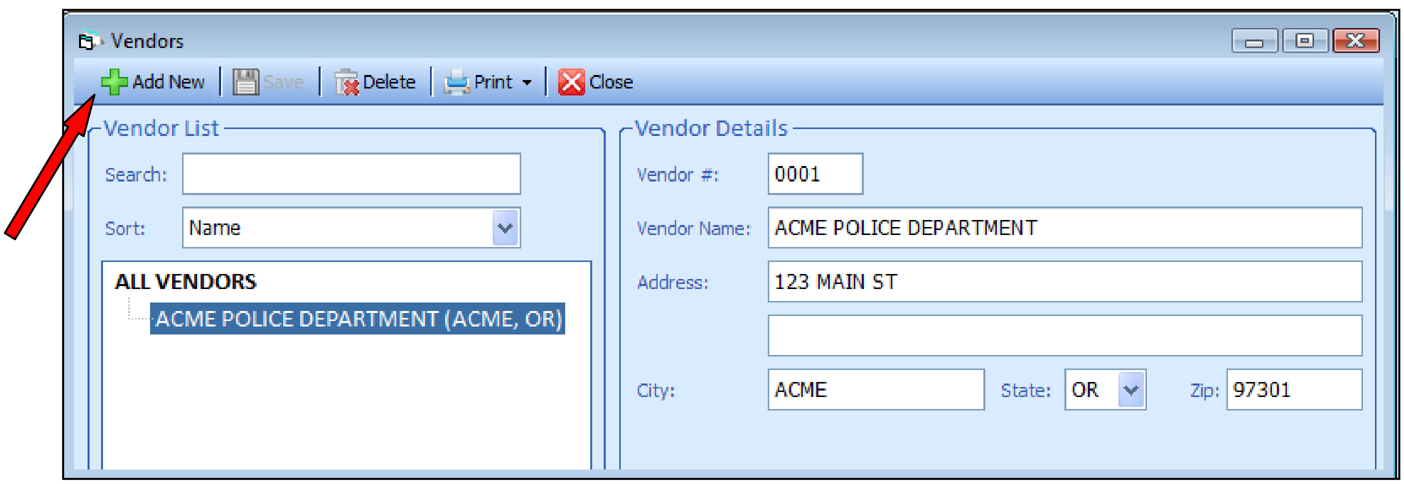
Overview:

Every course must have a vendor associated with it. The term "Vendor", does not necessarily mean "Instructor", rather the organization the instructor represents. You can create and manage vendors in the "Vendor Module" or at other times in other modules prompting you to select a vendor.

Procedure:

1. You can access these features in the Vendor Module from the Home Screen or, when selecting a vendor in the Training Module.

2. To add a new vendor, click the "Add New" button on the menu bar at the top of the Vendor Module window.   To Edit or Delete a Vendor, first select the vendor you wish to edit or delete and then either make your changes in the window to the right and save or select the "Delete" button from the menu bar at the top of the Vendor Module window.



Note: *When adding a new vendor, the Vendor Code will be assigned automatically by The Training Officer. Enter as much information about the vendor as possible, but keep in mind that only the Vendor Name is required.*

***** When deleting a vendor, you will be asked to confirm the operation before any updates will take place.

Note: *You cannot delete a vendor which has been associated with any courses. You must either edit the vendor information or change the vendor for those courses then delete the vendor when it is not longer associated with any courses.*

Creating, Editing, Deleting Courses:

<u>Overview:</u>

The Training Module lets you enter a new Subject, Subject Category, a new course, session and register students in a course all in the same place. To add a new course, you need to identify the appropriate Subject and Subject Category Code and the Vendor. If the vendor has not been added to the system, you can also add the vendor in this module or in the Vendors Module. Before adding any course to the system, assess which Subject and Category is appropriate for the course. This coding process is based on the course content. This process is similar to the Employee Priority Category coding. In fact, course coding and priority coding is the link to matching training priorities and training resources.

The Course Code identifies a specific training course. Each course will have a specific code assigned when it is added to the system. The course code is a linkage of the subject code + category code + vendor number + course number. When a new course is added to the system, the Category code and the Vendor number are linked and a course number is assigned for that category code and vendor number. (The first course will be 001; when another course for this same category and vendor is added, the number will be 002.) The following example shows the components of a Course Code Number. Click on each of the four number segments to view their significance in making up the course code.

Course Code Number: 100 - 001 - 0001 – 001

Think of it like the Dewey decimal system

In V3, the actual course code # is less important to worry about with the new features allowing you to view your courses all at once by Subject, Category, Name or Location. You can even filter by how recent the course may have been.

The important thing to establish is a meaningful way to organize your courses. Go back to your organizational structure. Many of these structures look like a pyramid with the Chief or Sheriff at the top, branching out with more and more employees stacked under each division or section. Each "Layer" is more specific and has more personnel. Imagine the same for the way to organize your training courses.

For Example: You have a course called "Firearms Qualification Course". Firearms Qualifications is really part of a broader scope of "Firearms" training. And, similarly, "Firearms" training is part of a broader scope of "Use of Force" training. So, in this example, you could create a subject called "Use of Force" then create a subject category called "Firearms" then create your course called "Firearms Qualification Course" and finally create your sessions under that course.

You could create several categories under "Use of Force" IE: "Defensive Tactics", "Confrontational Simulation (Simunitions)", or "Taser" etc. Each category can have several courses and several sessions per course.

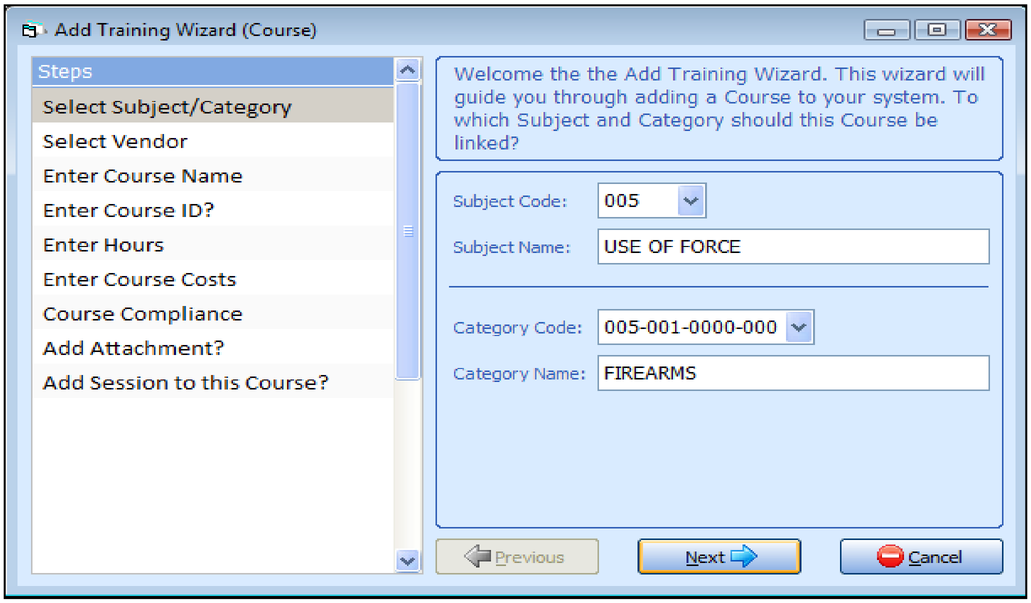
Why is this so important? REPORTS! Because the course is part of a layer organized in a hierarchy, you can run reports layer, by layer. Example: One of your officers deploys his or her firearm on a suspect and fatally injures them. The suspect's family then sues the department and the officer for excessive use of force. The attorneys want training records for that officer, but they don't just want to know what kind of Firearms training the officer's had, they want to know 1. How much Use of Force training the officer has had? 2. Out of that Use of Force training, how much and what kind was Firearms? 3. How much of that Firearms training was Qualification training?

If you enter the training courses with this sequence in mind, you will be able to retrieve the information layer by layer.

<u>Procedure:</u>

1. Open the Training Module. Find the appropriate Subject and Subject Category that you want to add a course to. If you do not see the appropriate Subject or Subject Category, you must add it. (see above). If you see your appropriate Subject or Subject Category, click on that Subject Category. This will reveal any courses listed under this category. To add a new course, click the "Add Course" button in the menu bar at the top of the Training Module Window.

Note: *By default, the add course Wizard will run. This Wizard will walk you through step by step in adding a course, session and enrolling students all at the same time. If you prefer not to use the Wizard, click the down arrow next to "Add Course" and de-select the "use Wizard" line at the bottom, then click "Add Course" again to begin manual entry.*



2. Follow the step by step instructions answering the questions the Wizard requests.

Note: *During this process you will be asked if you would like to add an attachment. This allows you to upload scanned or digital files of lesson plans or outlines associated with the course or session. You can either do this in the Wizard or manually. When you select this, a simple browse window will appear asking you to navigate to the file you want to upload location. Once uploaded, the program archives the file. You will not need to have your own file folder system elsewhere to maintain these records. You can only attach one file per course or per session.*

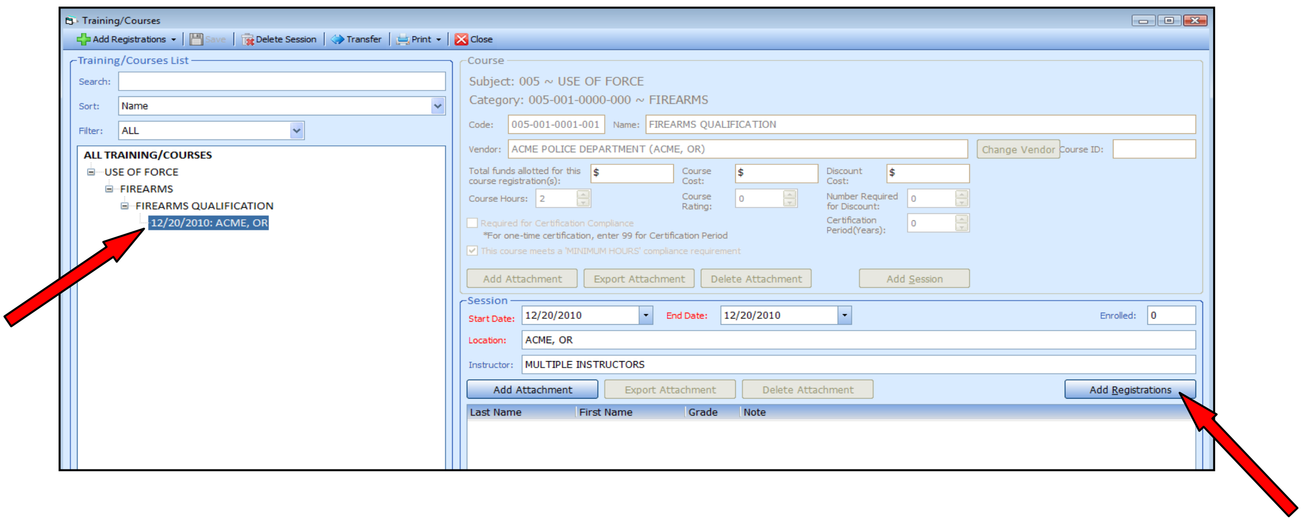
3. Information such as the title of the course, the number of course hours, course cost, the number required for a tuition discount and the discount costs can be entered in the Wizard or manually. Leave the discount costs and number required for a discount "zero" if a discount is not offered by the vendor.

4. You can specify that this course is required for Certification Compliance by checking the "Required for Certification Compliance?" check box. Now you can enter a certification period for the course (in years). For one-time certification, enter "99" for a certification period.

5. You can specify if this course meets minimum compliance hours as well. If the course meets the minimum compliance hours then check the box. Minimum compliance hours refers to: Does this course count toward an employee's required hours of training either set forth by the State Training Academy or Department policy. For example, if your State Training Academy mandates an employee have 24 hours per year of some kind of Use of Force training, then any course you add under the Subject "Use of Force" would count towards minimum compliance hours. You can later run a report to determine which employees are deficient in the number of minimum required compliance hours.

6. Now add any sessions for this course known at this time. You may do this by clicking on the "Add" button in the Course Sessions section of the window. You will enter the starting date, the ending date, instructor(s) and course location. You can also attach a lesson plan for the specific session. This attachment can differ from any other attachment you may have added under the main course name. However, you may only attach 1 file per course or session.

7. After adding a session, you can also add student registrations. This can be done in the Wizard or manually. (See Process Course Registrations)



Note: *If you make a change to a course and there are sessions already set up for that course, the system will prompt you to decide whether you want to apply your changes to all previously enrolled students in previous sessions or to only apply your changes to any future sessions and students you register. This is extremely important to understand. If you indicate that you want all previous sessions and students to be affected the change, then* ***all*** *prior training records for this course will be changed. Be sure you really want to back update previous records before doing so. An example of wanting to backdate may include fixing a spelling error or other clerical error when you originally set up the course. An example of not wanting to back date would be if a certain course was originally taught by a certain vendor, but a new vendor is now teaching the same course. You may not want to back date all previous records with the new vendor as now all your previous records will incorrectly indicate the wrong vendor taught the course.*

Course Code Transfers and Course Merging:

Overview:

This feature allows you to move or merge the structure of your courses. You can move or merge Subjects, Subject Categories, Courses or Sessions. Use this feature if you inadvertently created duplicate courses or incorrectly filed a course or a category in the wrong place. Be very careful when you do this because it if you merge items, they cannot be undone. Transferred or moved items can be moved back, but once they are merged, they are merged permanently.

Procedure:

1. You can access these features in the Training Module from the Home Screen.

2. To Transfer or Merge items, click on the “Transfer” button on the menu bar at the top of the Training Module window.

3. First, select the training resource you want to move or merge. You can select a Subject, Subject Category, Course or Session. **Note:** You cannot move Subjects. You can only merge them. Since a Subject is the first layer in the structure of course, it cannot be moved under another layer because it needs to be on top due to it being a Subject. Therefore, it can only be merged with another Subject.

4. Second, select the training resource you want to accept or merge with the first resource you selected. The second selection will be the one that remains either after a merge or after the move. The first resource is the one which is moving or essentially going away after the merge.

5. Confirm the information on the confirmation screen which appears next. Ensure that you are absolutely sure what you are doing as merging cannot be undone without significant effort which is not covered under your technical support agreement. At any time, you can select “Previous” or “Cancel”. The actual moving or merging does not occur until you click “Save”.

6. Once you are satisfied, click “Save”.

Enrolling, Editing, Deleting Student Enrollments into Courses:

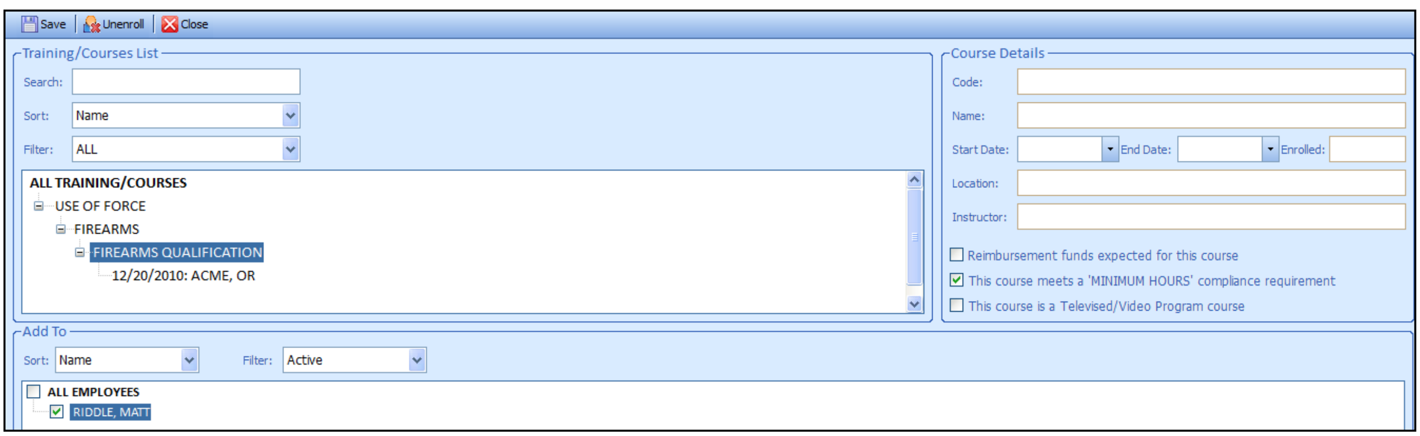
Overview:

This option allows you to enroll as many employees for a course as you desire. From this module you can change information regarding the specific enrollment, assign a grade to students, update student hours or delete their enrollment. You can also print EMPLOYEE NOTIFICATION MEMOS, SUPERVISOR FOLLOW-UP EVALUATIONS, and VENDOR LETTERS.

Procedure:

1. You can enroll an employee into a course two ways. First, in the Training Module, and second in the Employees Module.

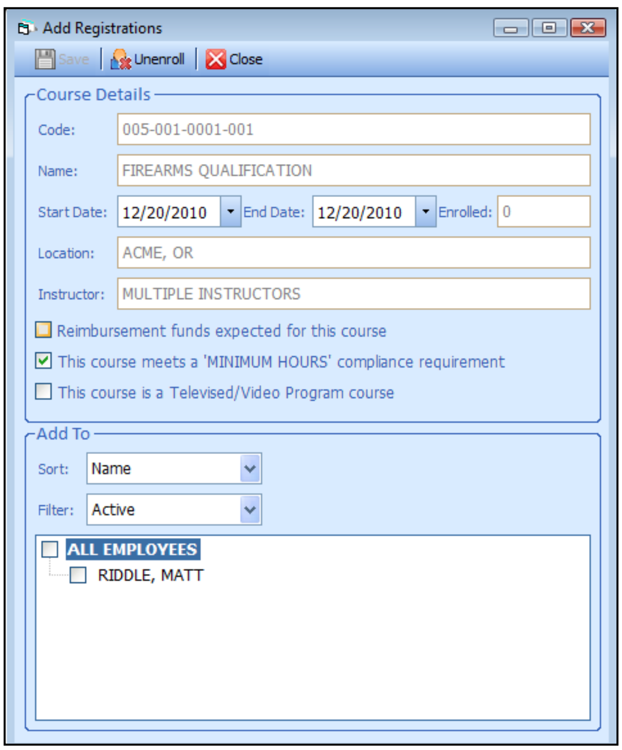
2. To enroll an employee into a training course from the Employee's Module, select the specific employee and navigate to their "Courses/Registrations" heading in their tree view. Click "Add Course" on the menu bar at the top of the Employees Module window. A window will open which asks you to select the course you want to enroll them into and to specify which if any additional employees to add to the registration. By default, the employee's name in which you're editing their record will be checked, but you can add additional names or select an entire cost center or group etc from here as well. Click "Save" to enroll the students, or click un-enroll to unregister students. Only those names or groups with a check mark in the box will be affected by whatever you choose.



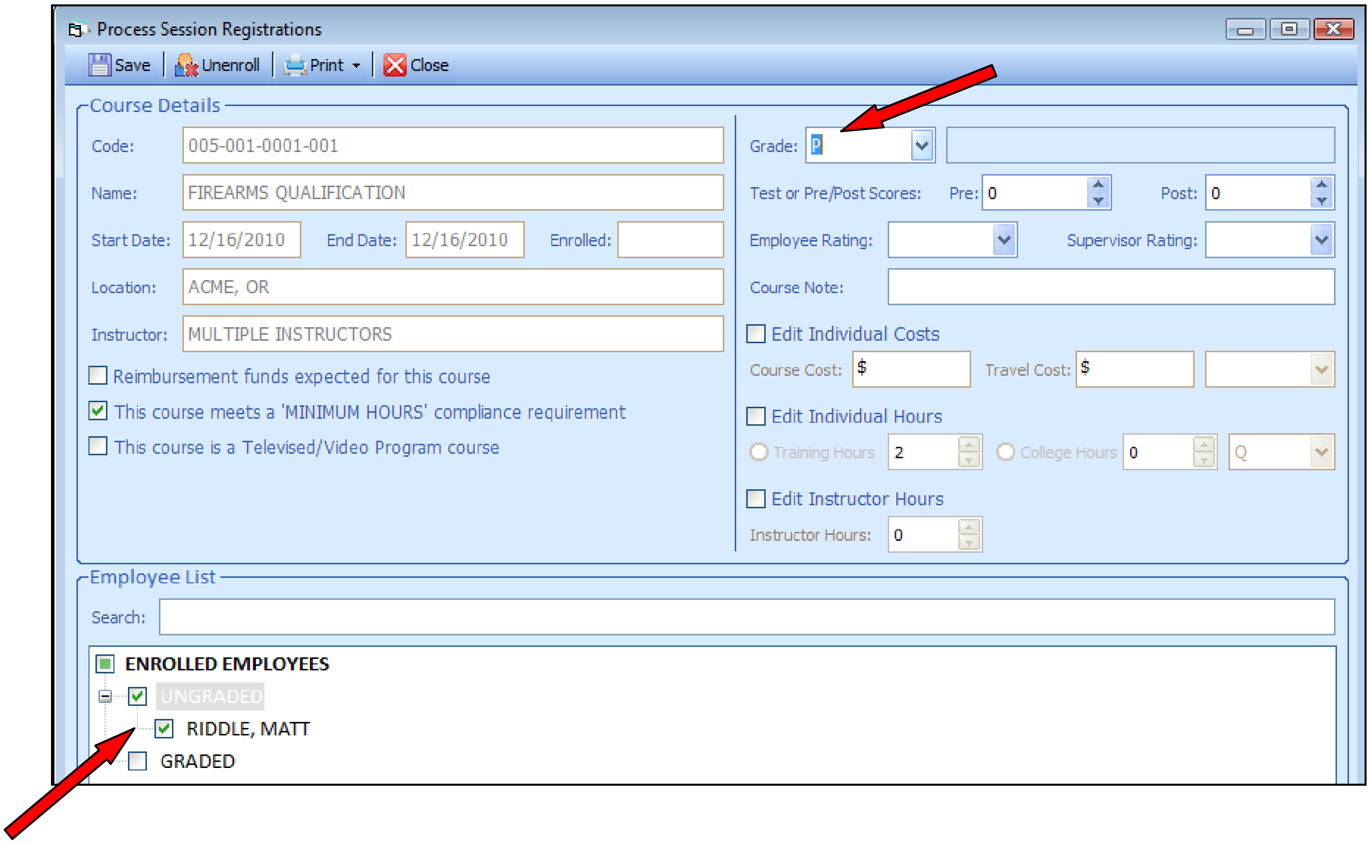
3. To enroll an employee into a course from the Training Module, open the Training Module from the Home Screen.

4. Select the appropriate course from the tree view to the left. You can search by keyword or sort the tree view based on your preferences. There is even a filter which will limit the number of sessions visible to you to lessen the time spent scrolling through old records.

4. You can only enroll students into a session. If a specific course does not have a session listed or is not the correct session, you'll need to create a new one. Click "Add Session" from the menu bar at the top of the Training Module window or "Add Registrations" if you already have a session you want to use. If adding a session, follow the steps in the Wizard. If just adding registrations, select the students or group of students you want to enroll and click "Save."



Note: *If the session you are enrolling the students in has already occurred, a window will immediately pop up asking you to assign the students just enrolled a grade. You are not required to do so right then, and can always come back to this later. The message center will remind you that you have un-graded students for a particular session. If you choose to grade the students at this time, you may select one, multiple or all the students to apply the grade and other information to such as hours etc.*



5. The Training Officer will automatically notify you if any of the enrolled employees are already enrolled in courses that have dates which may overlap those of the current course. You will also be notified if any of the employees have identified priorities which may have been met by this course enrollment or if there are other employees on a waiting list for this same course. You can un-enroll students at this time if you find you have inadvertently double booked them for a training, or, you may continue with the registration.

Glossary:

Notes: Miscellaneous information you wish to track for a specific employee or group of employees.

Category: Identifies a specific area of training within a Subject area. For example, "New Supervisor Orientation" can be a category under the "Management" subject.

Category Code: The Category Code is a combination of the Subject Code and a three digit code that the system assigns when the category is established. For example, if the category of New Supervisor Orientation is added to the system in the Management Subject (Subject Code of 100) a Category Code of 100-001 is created.

Confirmation Memo: The Confirmation Memo informs the employee that they are approved to attend training. The Confirmation Memo contains a rating scale that the employee can fill out after training and return to you. This information is used in the Registration Update process.

Cost Center: Any unit identified on your organizational chart. This could be an entire department, a section, or an individual work unit. The first two digits of the Cost Center are derived from a Division Code. Each Cost Center must have a unique, alpha, numeric, or alphanumeric identifier code.

Course Code: A code identifying a specific course. The code is comprised of a Category Code, a Vendor Number, and a sequential three digit Course Number assigned when the course is placed on the system.

Course Number: When a new course is added to the system, the Category Code and the Vendor Number are linked and a course number is assigned for that category code and vendor number.

Division: A major section (division) in the organization that could have a number of Cost Centers in it. The Division Code is two characters / digits in length. Each Division must have a unique, alpha, numeric, or alphanumeric identifier code.

Employee Profile: All related employee information. The employee profile is displayed as a tree view with all of the sub-categories directly under the employee’s name.

Employee Rating: A qualitative rating by an attendee assessing the training session, course content, etc.

Instructor Qualified: This designation of an individual allows them to be specified as a qualified instructor in a Training Category Area that is on the system.

Management Level: A number from one (lowest) to nine (highest) reflecting the level of management for any employee. You can define what the numbers represent in the Options Module.

Prior Expended Amount: Tracks any expended amounts for the current budget period for training that took place prior to the installation of the program.

Priority: A ranked assessment of the training needs for an employee.

Priority Code: The priority code consists of a number between 1 and 9. You specify the priority of any specific Category Code on the system, and when any employee is enrolled in a course which may meet the priority, you will be notified.

Subject: A broad area of training encompassing related training topics. Within each subject, there can be one or more Categories that have a relationship to the subject. The Subject Code is a three (3) digit number assigned by you that identifies the subject. There may be up to 998 different subjects.

Supervisor Follow-Up Memo: The Supervisor Follow-Up Evaluation is dated 60 days after the ending date of the course and should be sent to the supervisor on that date. The supervisor assesses changes in work performance as a result of training. This assessment is returned to you for the Registration Update process.

Supervisor Rating: A qualitative rating given by the attendee's supervisor assessing any behavioral changes in work habits, productivity, etc. resulting from training. This rating is reflected in the Vendor Rating.

Training Memo / Order: Notifies the employee that he/she has been approved to attend training. This form also contains an attendance confirmation and a course rating section to be completed by the employee. The Training Memo/Order should be returned to verify and complete the course registration update.

Vendor: A Vendor is the individual, company, or organization that performs the training activity. This could be an in-house trainer, your organization, or an outside training source. A four digit (4) number is assigned by the system when a new vendor is added.

Vendor Letter: The vendor letter can be printed for all individuals registered for this session or only those registered at this time. There are seven (7) vendor letter options from which to choose based on the conditions of the registration. Choose the most appropriate one.

Options Module:

Overview:

In this Module you can change system Information allowing you to customize the Training Officer™ 2000 V3 to your specific needs.

You can change:

- Turn the budget on or off and specify the budget cycle
    - This option allows you to temporarily turn off the budgeting features in the software. Use this feature if you do not use Training Officer 2000 V3 to track budgetary items.
- Change reserved categories
    - This option allows you to specify which Subject Category is reserved for CPR/First aid training
- Change your password
    - This option allows you to change your system password
- Specify College Quarter or Semester Hours
    - This option allows you to calculate college education in Quarter hours or Semester hours.
- Customize fields in the Employee and Training Modules to fit your agencies needs.
    - This option allows you to customize data fields within the software to match your agencies style. IE: "Spouse" can be changed to "Partner" or "Race" can be changed to "Ethnicity" or "DPSST #" (Oregon) can be changed to "TCLEOSE #" (Texas)
- Create, edit and mange your drop down menu lists found throughout the program to maintain standardization.
    - This feature can be used to create standardized drop downs such as rank structure, certificate names, notes and special skills.

- Change Report Paragraphs
    - This option allows you to change the wording in the paragraphs for the Vendor Letters, the Potential Course Roster, the Employee Training Confirmation Memo, and the Priority Completion Memo.
- Update your software registration information
    - Use this feature to keep your agency's contact information up to date and on file with Sierra Pacific Software to take full advantage of all the system updates, tutorials and other support.
- Restore program defaults
    - Restores program settings and preferences to default values without erasing your data.

Message Center:

Overview:

This allows you to add a new reminder note to the system, edit an existing reminder note, delete a reminder note or address a system alert automatically generated by the software.

Procedure:

1. Open the Message Center Module from the Home Screen.

Note: *A red star on the Message Center Module means there are new messages or alerts that have not been resolved.*

2. The view filter will allow you to see “Pending” notes or alerts or “Postponed” notes or alerts. You may postpone or UN-postpone any alert or reminder note, but once you delete a note or alert, they are gone and cannot be retrieved.

3. If you double click on the alert or note, the software will either open up the reminder note for you to read, or take you to the area of the program to address the alert. IE: The system will generate an alert to tell you that a certain course has ungraded registrations. Or, the system will alert you that an employee is expired in a certification compliance course or about to expire in a certification course.

4. To postpone a message or alert, click the specific message or alert, and then click “Postpone” on the menu bar at the top of the Message Center Module window. You will need to specify a specific date to which you want to postpone the item for.

5. To select multiple messages to either postpone or delete, use the standard Windows keys, “shift” or “ctrl” to multi-select messages.

Add, Edit, Issue Materials and Consumable Items:

Overview:

This option allows any material or consumable to be added to the system for tracking and inventory purposes.

Procedure:

1. Open the Inventory Module on the Home Screen

2. Click on Materials in the tree view, then click “Add Material Type” on the menu bar at the top of the Inventory Module window.

3. Name the material type, IE: Firearm or uniform or duty belt, click “Save”

4. Next, click “Add Material Item” on the menu bar at the top of the Inventory Module window.

5. Fill in the appropriate information, IE: Glock 21 or Colt R0977, the unit of issue, IE: each officer is issued 1 Glock 21, so the unit of issue is “1”. Fill in cost and click “Save”

6. The screen will refresh and reveal additional fields to fill out. Specifically, you will now be able to add inventory of this item. You only really have to do this the first time you add the item, then every time you issue out one of these items, it moves out of your initial set inventory. IE: Your department has 200 Glock 21’s. You add 200 to your inventory and you have 200 in stock. When you start issuing them out, your “in stock” quantity will go down to indicate how many remain out of the original lot.

7. You are now ready to issue the items.

8. To issue, click “Issue” on the menu bar at the top of the Inventory Module window.

9. A new window will pop up allowing you to fill out information. You may enter a unique serial number for the item, or leave the serial number blank. You can indicate a location the item is being issued to, IE: Bike Patrol, or Patrol, or SWAT, indicate the date the item is being issued out and then assign it to a specific employee, or group of employees. Note: Be careful not to issue an item with a unique serial number to multiple employees at the same time as only one employee can be issued such a unique item. The serial number field does not take the place for a model number, if you want to indicate model number, you should name your material item that, IE: Glock 21.

10. Click “Save”. This will take you back to your material item window and you will now see that your “stock” has been reduced by whatever your issue amount was, in many cases, it will be 1 less than you started with as most units of issue is “1”.

Add, Edit, Issue Packages:

Overview:

In addition to Materials and Consumables, you may create a Package of items to issue. This is to speed up the inventory process for new employees who may receive numerous items when they are first hired. Rather than entering each item and issuing one item at a time to each employee, you can create a package to issue all at once to a single employee or group of employees. IE: If a new police recruit is issued a field notebook, citation book, 3 uniform shirts, 3 uniform pants, 2 sets of handcuffs, a baton, handcuff case, magazine case, radio holder etc, you may include all of these standard issue items as one package and simply issue that package to the employee.

Note: *In order to add items to your package, they first must exist in the Material or Consumable categories. Follow the instructions on adding items to Materials or Consumables.*

Procedure:

1. Open the Inventory Module.

2. Select the word “Packages” from the tree view, then click “Add Package” on the menu bar at the top of the Inventory Module window.

3. It will ask you to name your package, IE: Police Officer (which would indicate the following package of items which are standard issue equipment for a Police Officer)

4. Once you have created a package name, then click “Add Package Item” on the menu bar at the top of the Inventory Module window

5. Begin to add Material or Consumable items to your package by selecting them one at a time, saving each time. When you have completed adding items to your package, you may issue the package to an employee. To issue the package to an employee, follow the instructions for issuing a material or consumable item.

Resetting the Budget:

Overview:

This option resets budget figures for all Divisions and Cost Centers. The budget should only be reset at the end of the budget period. When the budget is reset, all past training histories for all employees can be removed from the system at that time. Any registrations that have not had the attendance status updated will be placed into the prior budget period, and will not be reflected on reports for the new budget period.

If you do not have an up-to-date printout of all employees' training, we strongly suggest that you print the Training Histories report for all employees. This can then be placed with your backup disks for later reference if needed.

Procedure:

1. Exit the program and BACK-UP the Training Officer subdirectory of your hard disk. (If you are not familiar with this, check with the system administrator or computer specialist in your organization).

2. Place this copy in a safe place and mark it as the ending of that specific budget period.

3. Return to the Program; access the Budget Module and select Reset the Budget on the menu bar at the top of the Budget Module window.

4. Confirm that you have made a back-up and click the Yes button to reset the budget.

Division Budget Transfers:

Overview:

This option only transfers allocated funds from one major Division to another. To transfer funds between Division and Cost Centers, use the Cost Center Budget Transfer option.

*(**Note:** You must select "Track Finances" in the Options Module and create a beginning budget date along with budget duration to modify, transfer and track the budgets and cost centers for divisions.)*

Procedure:

1. Open the Budget Module

2. Click the "Transfer" button on the menu bar at the top of the Budget Module window.

3. Select "Division" depending on what budget you want to transfer

4. Select the source of the transfer on the top, select the recipient of the transfer on the bottom and fill in the transfer dollar amount. Click "Complete Transfer"

Running Reports:

Overview:

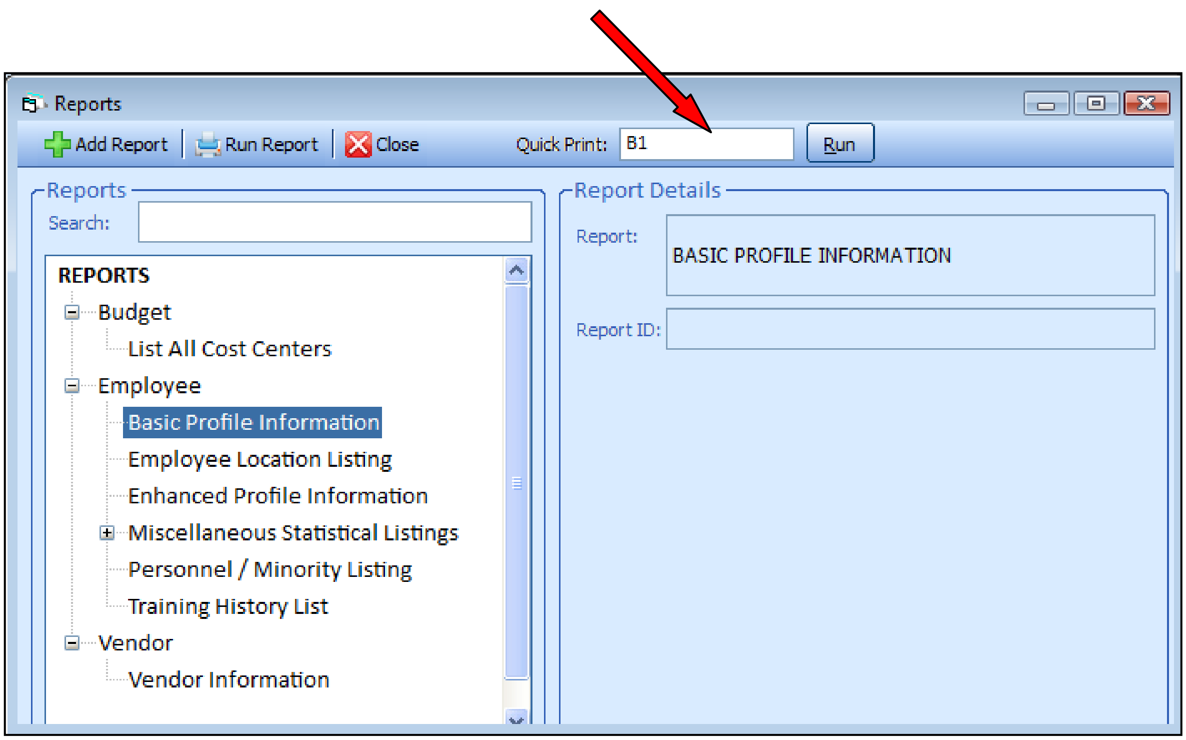
You can run a variety of reports from within the Reports Module. You can contact Sierra Pacific Software to purchase customized reports which you can upload into your system from within this module. Custom reports are priced on a case by case basis depending on their complexity.

Procedure:

1. You can access the Reports Module form the Home Central Screen.

2. Navigate to your desired report using the tree view to the left.

3. If you frequently use certain reports, take note of that report's identifying ID number and use the "Quick Print" box in the menu bar at the top of the Reports Module window to quickly enter your desired report, and then click "Run"



4. If you choose not to use the "Quick Print" feature, you may select your desired report, and then click "Run Report" on the menu bar at the top of the Reports Module window.

5. You will also notice "Print" buttons throughout other modules in the Training Officer 2000 V3. These print buttons will automatically print the associated reports

pertaining to that area. For example, in the Employees Module, there is a print button next to the employees training courses list. The print button will print their training history which will prevent you from having to go into the Report Module if you simply want to quickly view an employee's training record.

We hope you have found this manual helpful in setting up, navigating and using all of the features of TrainingOfficer2000 V3.

NOTES: