

# SIERRA

Pacific Software



**Sierra Pacific Software, LLC**  
12784 SW Rembrandt Ln. Tigard, OR 97224  
Ph. 503-585-7022  
[www.trainingofficer2000.com](http://www.trainingofficer2000.com)  
[support@trainingofficer2000.com](mailto:support@trainingofficer2000.com)

Welcome to...

# **The Training Officer<sup>®</sup> 2000**

*for Windows*

## *User Manual*

[www.TrainingOfficer2000.com](http://www.TrainingOfficer2000.com)



# **The Training Officer® 2000 Help File Addendum**

---

## **Upgrade Policy**

Sierra-Pacific Software will periodically release maintenance upgrades to its software programs. It is our upgrade policy that all new versions will be made available to users as soon as is practical. To check on the availability of maintenance releases, check our web site at: <http://www.trainingofficer2000.com>

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 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](mailto: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**

Copyright ©1988-2003  
Sierra-Pacific Software  
12784 SW Rembrandt Ln  
Tigard, OR 97224  
All Rights Reserved

No part of the work covered by the copyrights hereon may be reproduced or copied in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, typing, or informational retrieval systems - without the expressed written permission of Sierra-Pacific Software.



# The Training Officer® 2000 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.

**Read / 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 Menu \_ Courses / Vendors Menu \_ Subject Category Listing (Report)

- Add your employees to the Training Officer® 2000 program. This is done in the Employees Menu \_ Add Employee.

*Note: You may use the enclosed *Employee Profile Form* to collect the employee profile information.*

*When all of the above has 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 Courses & Vendors Menu \_ Add New Course to System.

*Note: This is the option that you will use to create all training records.*

- Review the **Generic Course Option** section in Appendix A. This May be particularly when you are *Back Dating Old Training Records*.

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

- The only option to add a training record for an individual is the Training Menu \_ Process Course Registration.

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



---

**Read Me First  
Section**

---

## Read Me First Section

---

The purpose of this section is to help you install The Training Officer<sup>®</sup> 2000 on your computer and the item necessary to work with The Training Officer<sup>®</sup> 2000 and the Demo / Tutorial Program.

---

### **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<sup>®</sup> 2000 program. The Demo version will only display the items.

- *Budget Year Beginning Date* - This is the date that your current budget year began.
- *Vendor Letter Signature Name*                      This applies to the person that is  
*Vendor Letter Signature Title*                      responsible for the training function.  
*Vendor Letter Telephone*
- *"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.
- *Budget Option* - The program will only perform budgeting functions if a "Y" is entered here. Enter "N" to ignore the budget functions.
- *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<sup>®</sup> 2000 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 Change System Information - Option 2, in the Maintenance Menu.

---

## **Read Me First Section**

---

You can access any function of the program directly from the Main Menu option. A thorough understanding of the menu options will enable you to access the full power and ease of operating The Training Officer® 2000 program.

### PASSWORD APPLICATION FOR THE FULL TRAINING OFFICER® 2000 PROGRAM

This section applies to the complete Training Officer® 2000 package only and not to the Demo / Tutorial version.

Once you have installed The Training Officer® 2000 and entered the required information, you should next print out the application for a password. The password is needed after you have started the program 40 times.

1. Access the Maintenance Menu from the Main Drop-Down Menu.
2. Select Print Application for Password.
3. Fill in the required information.
4. Send the application to:  
Sierra-Pacific Software  
12784 SW Rembrandt Ln  
Tigard, OR 97224

### **Getting started with The Training Officer® 2000**

You will need to complete the following three (3) steps before The Training Officer® 2000 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 Budget & Cost Center Setup / Edit from the Budget and Cost Center Menu. It is advisable to work from a copy of the 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 scheme 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

---

### **Subject-Category Setup and Review**

Review the Training Subject / Categories supplied with the program.

This can be done by running the... Print Subject / Category Listing in the Courses and Vendors Report Menu.

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 in full operation. If you encounter any problems or have any questions, please call...

Sierra-Pacific Software  
(503) 585-7022  
[support@trainingofficer2000.com](mailto: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**

---

The Introduction Section will acquaint you with the fundamental concepts incorporated into The Training Officer® 2000. 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

---

The Training Officer® 2000 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 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 will accept any alphanumeric code up to eight (8) digits long.

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.

## **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:

<u>Administration Division</u>	<u>Field Ops Division</u>	<u>Services Division</u>	<u>Comm Division</u>
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.*

---

## Introduction to The Training Officer® 2000

---

### **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 methods of assigning Cost center codes.

<u>Organizational Units</u>	<----- Cost Center Codes ----->				
	<u>This</u>	or	<u>This</u>	or	<u>This</u>
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

---

## **Introduction to The Training Officer® 2000**

---

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 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 select the Budget Print Menu and print the Organizational Budget and the Cost Center Budget report 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 one of two (2) options – the first one at the division level, or the second at the cost center level, as shown below.

Example:

The current budget period began on July 1 and The Training Officer® 2000 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.

#### **OPTION 1**

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**

---

### OPTION 2

The second option below will only function if the above option is not used and the Prior Expended Amount is left blank.

In this option, you can elect to record the prior expenditure amounts for each cost center. You should enter the expended training amount for each separate cost center (e.g., cost center 010101 or ADDP Personnel).

For example, the total amount expended for the budget period was \$300.00 for the Administrative Division (01). You would then need to record the separate amounts for each cost center, \$150 for Director (Cost Center 0101), \$75 for Personnel (Cost Center 010101 or ADDP), and \$75 for Training (Cost Center 01010101 or ADDPT). The above amounts will be subtracted from the Division training budget by the system.

### **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 select the Budget/Cost Center Print Menu and print the Organization's Budget and Cost Center Listing and double check your figures for any errors.

## Summary

Let us review the crucial steps that are necessary to ready your organization for The Training Officer<sup>®</sup> 2000.

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<sup>®</sup> 2000 Program.
-

---

## **The Training Officer® 2000 Key Menu Options Section**

---

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

# **The Training Officer® 2000**

## **Key Menu Options**

---

### **Employee Menu 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 AdHoc Notes
- Rotate Work/Shift Assignments

### **Courses / Vendors / Sub-Cat Menu allows you to add, change or delete...**

- Course Information
- Training session information
- Training vendors / sponsors
- Subjects or Categories
- Change courses to a different subject / category

### **Training Menu allows you to...**

- 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 and Cost Center Menu 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

## Key Menu Options

---

### **Training Officer 2000 Reports Menu allows you to access...**

- Employee Reports Menu
- Courses and Vendors Reports Menu
- Registration Reports Menu
- Budget Reports Menu
- Department Reports Menu

### **Materials / Property Menu 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

### **Consumable Supplies Menu allows you to...**

- 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

### **Tickler File Menu allows you to...**

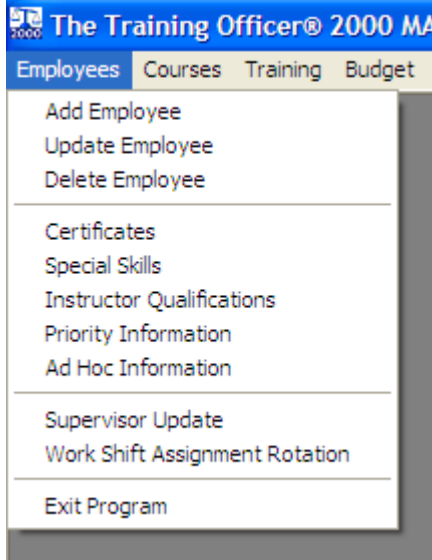
- Add a note to appear on a specified date
- Edit any notes on the system
- Delete a tickler note
- Print a tickler note

### **Maintenance Menu allows you to...**

- Print the Application for Password
  - Change any system information
  - Index the files
  - Change the text of various memos and letters
  - Reclaim the disk space of all deleted data
  - Establish access passwords
-

## Employee Menu Options

---



**Option 1 - Add a New Employee.** Adds an employee to the system.

**Option 2 - Update Employee Information.** This allows you to change the employee's personnel profile information.

**Option 3 - Delete an Employee.** Removes ALL employee information from the system.

**Option 4 - Certificates.** This lets you record an employee's achievement certificates.

**Option 5 - Special Skills.** This lets you record an employee's special skills or "expert witness" qualifications.

**Option 6 - Change Instructional Areas.** This option will enable any employee to be designated qualified to instruct in any training category that is on the system.

**Option 7 - Change Priority Information / Code.** This lets you change or edit training priorities for an employee or change the training priority coding.

**Option 8 - Employee AdHoc Information Menu.** This lets you add, edit or print any information you wish to track by specific employee or by topic title.

**Option 9 - Supervisor Update.** This allows you to update all employees' training profiles at once with a new supervisor.

**Option 10 - Work Shift Assignment Rotation.** Lets you move any or all employees from one work location to another.

---

## Courses Menu Options

---



**Option 1 - 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).

**Option 2 - 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).

**Option 3 - Delete a Course.** This option lets you delete a course totally from the system (See the Course Procedure).

**Option 4 - Vendor / Sponsor Information.** This allows you to add a new vendor to the system, change a vendor's information or delete a vendor totally from the system (see the Vendor Procedure).

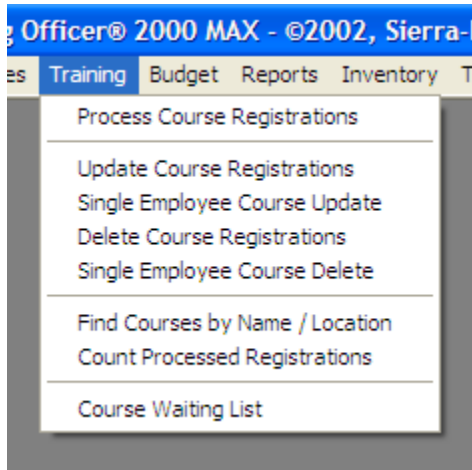
**Option 5 - Course Subject / Category Info.** This allows you to put new subjects and categories into the system or change an existing subject or category (see Subject and Category Procedure).

**Option 6 - Course Code Transfer.** 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).

---

## Training Menu Options

---



**Option 1 - Process 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).

**Option 2 - Update course Registrations (Update Existing Training Records).** This option updates the registration information for a specific course (see the Registration Procedure).

**Option 3 - Single Employee Course Update (Update an Existing Training Record).** This option allows you to change any or all courses for a single employee (see the Registration Procedure).

**Option 4 - 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).

**Option 5 - Single Employee Course Delete (Delete an Existing Training Record).** This option allows you to delete any or all courses for a single employee (see the Registration Procedure).

**Option 6 - 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.

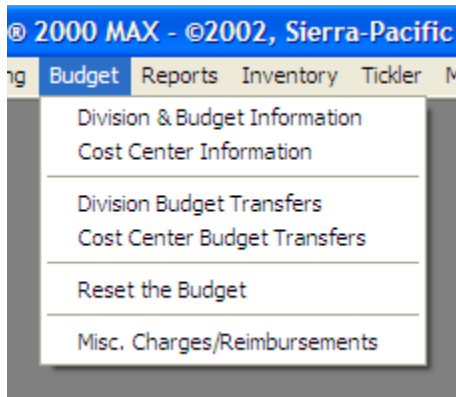
**Option 7 - Count Processed Registrations.** This allows you to count the number of registrations processed between two selected dates.

**Option 8 - 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 Menu Options

---



**Option 1 – 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).

**Option 2 - 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).

**Option 3 - Division Budget Transfer.** This option transfers allocated funds from one major division to another (see the Budget Transfer Procedure).

**Option 4 - 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).

**Option 5 - 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 Key Reports Section**

---

This section lists the Key Reports available in  
The Training Officer® 2000 Program.

# **The Training Officer® 2000**

## **Key Reports**

---

The following menu options are accessed from the Reports Menu.

### **Employee Reports Menu 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 Menu 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**

## **Key Reports**

---

### **Budget Reports Menu will allow you to print...**

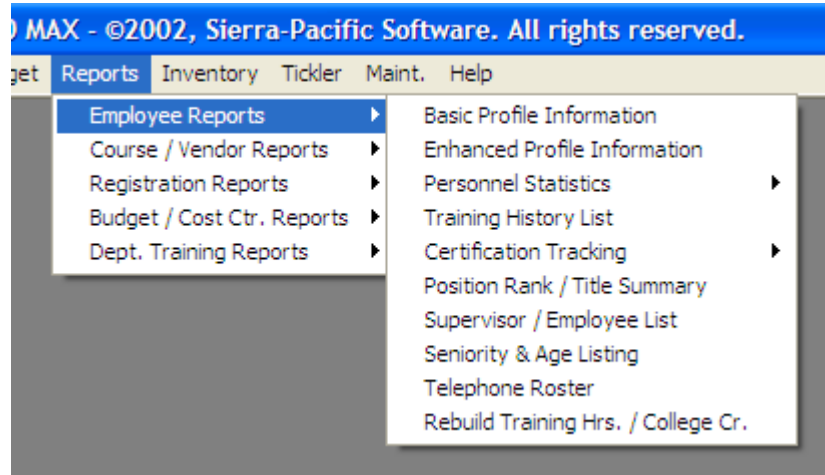
- The status of the organization's training budget
- Training cost by cost center number and work unit
- Summary of training cost by cost center and work unit
- Detailed training budget report by cost center
- Listing of all Cost Center on the system
- Listing of all Miscellaneous Charges / Reimbursements

### **Department Reports Menu 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

---



**Option 1 - Employee Profile Information (Basic).** This report lists the basic cost center related information tracked on the employee's personnel profile.

**Option 2 - Employee Profile Information (Enhanced).** This enhanced report lists much of the information tracked on the employee's personnel profile.

**Option 3 - Personnel Statistics.** This option's three sub-reports print various statistical listings such as employee locations, minority status, etc.

**Option 4 - 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 - Option 4***

**Option 5 - 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.

**Option 6 - Position Rank / Title Summary.** This report prints the number of individuals for each position rank / title.

---

## **Employee Related Reports (cont..)**

---

**Option 7 - Supervisor / Employee Listing.** 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. Employee Listing prints all of the employees, their cost centers and work locations for a supervisor. You can specify a single supervisor or all supervisors.

**Option 8 - 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 name or employment date order.

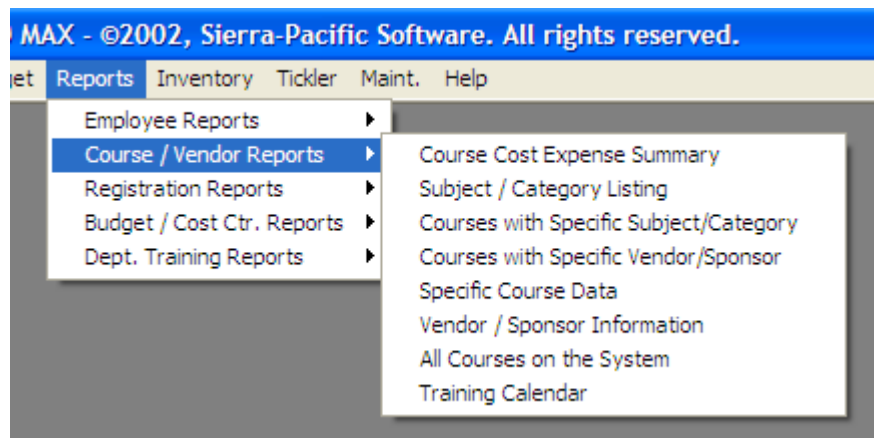
**Option 9 - Print Phone Roster.** This report prints in alphabetical order the employee's name, home and work phone number, work location, and division.

**Option 10 - 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

---



**Option 1 - 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).

**Option 2 - Print Subject / Category List.** This lists all of the subjects and/or categories on the system in alphabetical or numeric order.

**Option 3 - Print All Courses for a Subject or Category.** This report prints all of the information for courses within a specific training subject or category.

**Option 4 - Print All Courses for a Vendor.** This report prints all of the information for courses that are from a specific vendor.

**Option 5 - Print Specific Course Data.** This report prints all of the course data on the system for a specific course.

**Option 6 - Print Vendor Information.** This report prints out all of the vendors that are on the system in either alphabetical or numeric order.

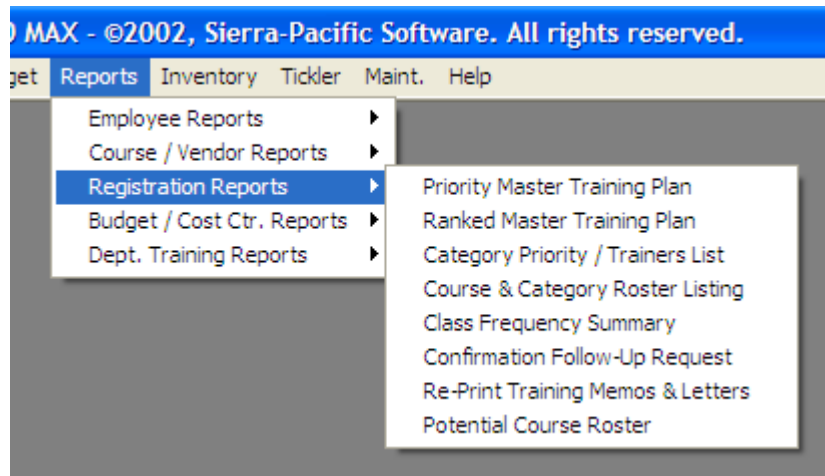
**Option 7 - Print All Courses.** This report lists the course information for all courses on the system in alphabetical or numeric order.

**Option 8 - Training Calendar.** This lists all the course sessions available from one date to another.

---

## Registration Related Reports

---



**Option 1 - 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 should 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.

**Option 2 - Ranked Prioritized Training Plan.** This report determines which categories are most requested from all the training priorities. It is recommended that you should print this report when you want to determine the 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 training is a key factor. The report shows the projected training costs based on the average course cost multiplied by the number of employees.

**Option 3 - 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

**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 (cont..)**

---

**Option 5 - Class Frequency Summary.** This report prints the total training activity 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).

**Option 6 - 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).

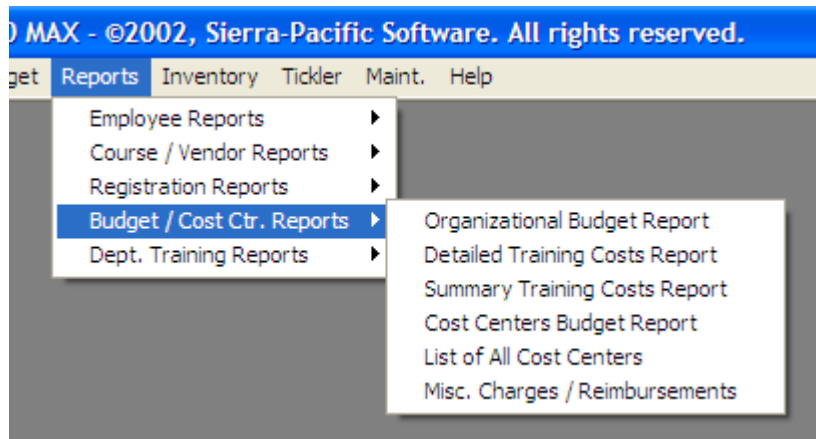
**Option 7 - Re-Print Training Memos & Letters.** This is a reprint of the training memos, and vendor letters for either a single employee or all employees registered for a course.

**Option 8 - 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

---



**Option 1 - 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).

**Option 2 - Detailed Location Costs Report.** This report can be printed for the entire organization or a single division. The report shows for each cost center the number trained and the training and travel costs by course and 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).

**Option 3 - 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).

**Option 4 - 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 (cont..)**

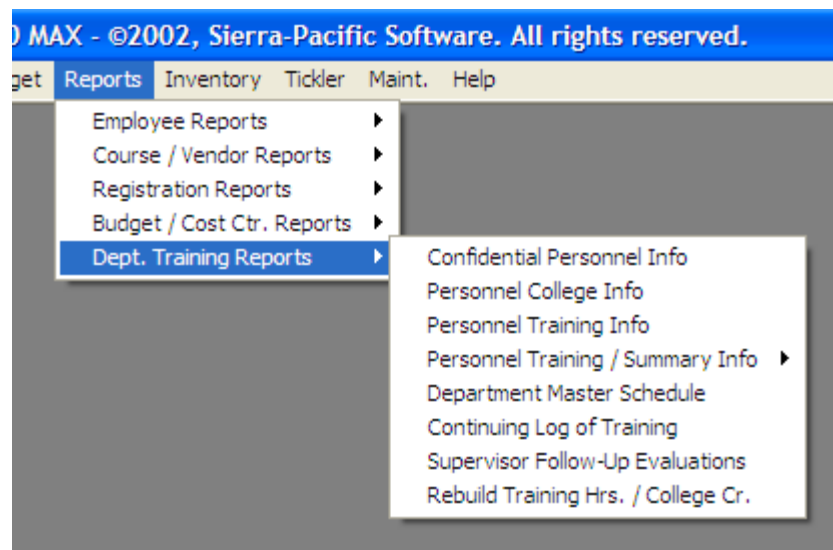
---

**Option 5 - 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).

**Option 6 - 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



**Option 1 - Confidential Personnel Info.** Prints the employee profile data including any instructional areas designated.

**Option 2 - Personnel College Information.** Prints the employee's academic college history for a single employee, cost center, or the entire organization.

**Option 3 - Personnel Training Information.** Prints the in-service training history and summary report of training hours for an employee, cost center, or the entire organization.

**Option 4 - 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.

**Option 5 - 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.

**Option 6 - 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.

**Option 7 - 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**

### **Back Dating Training Records**

---

In order to back date training records and retain the session dates for registration purposes only, the following procedure must be followed...

1. Select the System Maintenance Menu by clicking on the "Maint" drop-down menu
2. Select Option 2 - Change System Information
3. Select Back Date Training Records

*NOTE: The Back Date Training Records option will enable the user to retain the session dates for a specific course on the system that are more than 60 days prior to the current date on the system.*

This option is particularly useful when back dating a large number of old training records. When all Back Dating has been completed, return to this menu and so indicate by selecting this option again. This will remove all of the old session dates for all courses that have been back dated. The course dates will not be deleted from any training record whatsoever.

#### ***IMPORTANT***

There are two (2) methods (STANDARD and GENERIC) that may be employed to accomplish the back dating of training records.

#### **STANDARD METHOD**

This method requires that each course that is to be back dated be added to the system in the usual manner prior to the registration of any individuals that have attended the Course / Training in the past.

You will periodically want to use this method if the back dated records are going to be used for Certification Training Tracking or you want to be able to generate Rosters Type or Reports available in The Training Officer<sup>®</sup> 2000 program.

#### **GENERIC METHOD**

This option will enable you to back date a Generic type of training record without having to add the actual course to the system.

---

## Appendix A Back Dating Training Records

---

### GENERIC METHOD (Cont..)

There are some restrictions in the use of this option. Any training record that is added using the Generic option will not be listed on the following types of reports:

- All certification tracking reports
- Any type of report that will list a roster of individuals attending a specific course.

However, the individual's training record will reflect the course title and any other information relating to the course that was entered at the time of registration. The training hours and/or college hours will be included in the individual's training history as well.

*Note: The Generic option does not add the actual course to the system for future registrations. It is only effective for one-time enrollment. Several individuals may be enrolled in the same course if all of them are enrolled at the same time. If this is not the case, the course title must be entered each time.*

Any course that will be used to generate course rosters or certification compliance tracking reports must be added to the system in the usual manner. Do not use the Generic Course Option for certification tracking compliance.

This option should be used only in cases where the training record is for historical purposes only!

### Creating a Generic Course

1. Select "Courses" drop-down menu
2. Select Option 5 - "Course Subject / Category Info." and do the following:
  - a) Add a new Category titled: GENERIC TRAINING RECORD
  - b) Enter 999 for the Subject Code

The new Sub-Cat code should be 999-003. If the new Sub-Cat code is not 999-003, that's okay... just note the new Sub-Cat code. It will be needed when adding the Generic Course to the system.

3. Select Option 1 - "Add a New Course to System"

*NOTE: You will need to also add a Vendor / Sponsor titled GENERIC at this time.*

Follow the screen prompts and add a new course titled... GENERIC and do not enter any data in the remaining fields.

---

## **Appendix A**

### **Back Dating Training Records**

---

The fields other than the Course Title should be left blank! The remaining information will be captured during the registration process.

Note the new course code for the GENERIC course. You will need to enter the GENERIC course code each time you wish to record a training record for an individual using this option.

*NOTE: You will be able to over type the Generic Title and Vendor / Sponsor with the actual Course Title and Vendor / Sponsor during the registration process.*

From now on, you will be able to quickly input a Course Title and Vendor / Sponsor that is back dated without having to add them to the system prior to registering the individual in it. This will speed up the training records back dating process a great deal!

---

## **Appendix B**

### **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.*

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. Feel free to use or modify these two forms to suit your own 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 C - 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 Needs Assessment

---

(Sample)  
EMPLOYEE TRAINING PROFILE  
NEEDS ASSESSMENT

Date: \_\_\_\_\_

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: \_\_\_\_\_