

# Employee Training Records



## What are Employee Training Records?

The **Employee Training Records (ETR)** solution is a configuration, set of automations and reports that allow tracking training records and plans for all employees in the organization. Human Resources or Managers define a Role hierarchy that includes the Documents, Standard Operating Procedures (SOP) and Work Instructions (WI) that anyone assigned that role must be trained to. Training is then scheduled, the employee is notified, and signoffs are captured as training is completed.

A screenshot of the ETR system interface. At the top, it shows 'EMP-0003' and 'Production' with 'Unincorporated' below it. A navigation bar includes 'Title Block', 'Changes', 'Training Details \*', 'Quality', 'Relationships \*', 'Where Used', 'Attachments \*', and 'History'. The main content area displays details for 'EMP-0003', including 'Document Type: Employee', 'Lifecycle Phase: Production', 'Description: Tom Nelson, Principal - Product &amp; Program Management', 'Document Category: Operations|Employee Record', 'Rev Release Date: 01/20/2014 02:51:55 PM PST', and 'Effectivity Date: 01/20/2014 12:00:00 AM PST'. A photo of Tom Nelson is shown to the right. Below the photo, it says 'Viewable By: Ramay, Hassan (hramay)' and 'Manager/Supervisor: Ramay, Hassan'.

## The Challenge

Your company must manage training requirements for employee history and growth as well as regulatory requirements. The information may be spread across multiple tools and managed by more than one person. Employees don't always know what training they're supposed to be getting and when. Management doesn't have a good way of tracking who's received the required training, who's scheduled for upcoming training events, and who's missed the required training. And, finally, in the event of an issue or audit, how do you determine who was qualified to be working on a particular product 12 months ago vs. who was actually performing the tasks.

- Create a revision controlled record for every employee
- Automatically notify employees of new requirements as supporting documents are revised
- Tie employees to the product record
- Roles predefine requirements
- Every employee record provides training history as well as plans
- Details available for each requirement
  - Is training required for this identified change?
  - Revisions of a document to which the employee has been trained
  - Type of training
  - Planned training date
  - Actual training date
  - Who performed the training

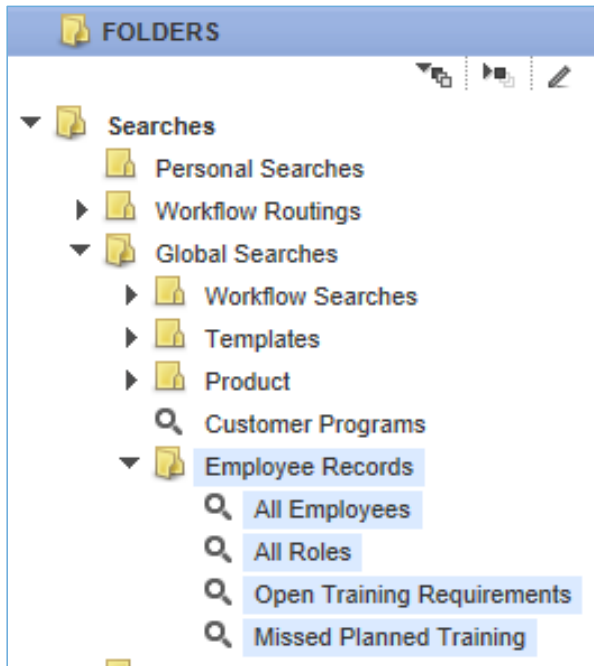


# Key Benefits and Features

# Employee Training Records



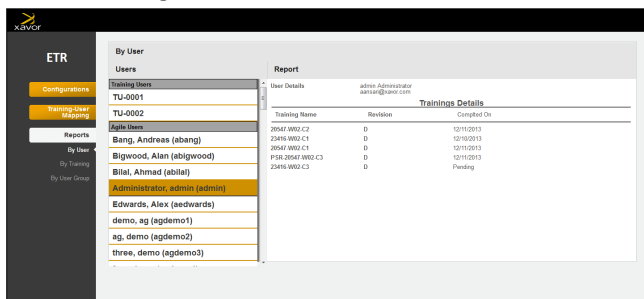
## Finding Information



- HR and/or Supervisors can manage employee training records
- Training records and plans are visible in a single location
- As documents are revised, employees may be automatically notified that new training is required
- Electronic signature approval is captured
- Regulatory requirements are met
- Group training may be taken into account
- Employee training records may be tied to the product for traceability
- Defined Roles provide employees with requirements for advancement in the enterprise

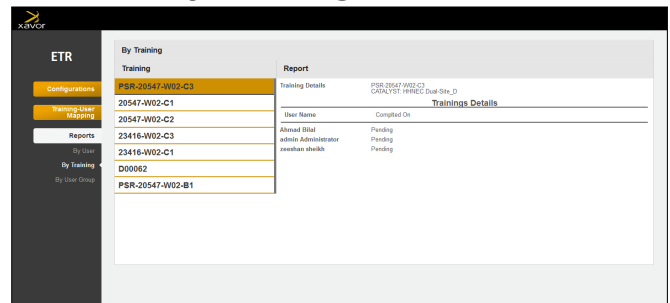
Global or Personal searches may be set up for Employees and Roles.

## Details By User



Multiple reports are available. This shows Completed and Planned training by User.

## Details By Training



This report shows user training status by SOP/WI.

## Highlights

- Works in 9.3.1 environments and later
- Uses the same Agile interface that users are already familiar with
- Provides a simpler user interface for casual users
- Training Change Order creation and population is streamlined and may be manually triggered from the Action Menu or automatically triggered from a regular Change Order status change
- Easy installing and configuration
- Upgrade safe
- Simple training



### About Xavor Corporation

Headquartered in Irvine, California, Xavor has provided business and software consulting services to enterprise companies since 1995. Our Agile PLM team delivers products, services and apps to enhance adoption and extend productivity. We perform new implementations, data migrations, upgrades and process customizations focusing on the semiconductor, medical device and high-tech verticals.

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