CHAPTER 6

REPORTS

Active Training

Purpose

This section helps you view and print active training reports.

NOTE: Training coordinators supporting several cost codes must change cost codes to access reports from secondary cost codes.

Procedure Start date

To view and print an active training report by start date:

Step	Action
1	Click on Reports from main menu:
2	Under Active Training Reports select By Start Date. Screen displays active training for all employees by start date.
3	Click on the printer button in the tool bar to print the report.

Procedure Course

To view and print an active training report by course:

Step	Action
1	Click on Reports from main menu.
2	Under Active Training Reports select By Course. Screen displays active training for all employees by course.
3	Click on the printer button in the tool bar to print the report.

Procedure Employee

To view and print an active training report by employee:

Step	Action
1	Click on Reports from main menu.
2	Under Active Training Reports select By Employee. Screen displays list of employees within cost code.
3	Click on employee. Screen displays active training for this employee.
4	Click on the printer button in the tool bar to print the report.

Training History

Purpose

This option allows you to preview and print two training history reports.

- Employee—displays one employee's training history
- Course—displays all employees in your cost code who attended the selected course

NOTE: Training coordinators supporting several cost codes must change cost codes to access reports for secondary cost codes.

Procedure Employee

To preview and print an individual training history:

Step	Action
1	Click on Reports from the main menu.
2	Click on By Employee from the Training History Reports menu.
3	Select an employee.
4	Right mouse click and select the print option to print the report.
5	Click on the course title to view an SF-182.

Procedure Course

To preview and print a course history:

Step	Action
1	Click on Reports from the main menu.
2	Click on By Course from the Training History Reports menu.
3	Click on course title from list and then click Run Report button.
4	Click on the printer button in the tool bar to print the report.

Vendor Reports

Purpose

This option allows you to:

- View all vendors who have conducted training for a particular course.
- View all courses taught by a particular vendor.

Procedure Vendor for Course report

To preview and print vendors for a particular course:

Step	Action
1	Click on Reports from the main menu.
2	Click on Vendors for Course from the Vendor Reports menu.
3	Click on a course, and then on Run Report button.
4	Click on the printer button in the tool bar to print the report.

Procedure Courses by vendor report

To preview and print courses taught by a particular vendor:

Step	Action
1	Click on Reports from the main menu.
2	Click on Courses Taught by Vendor from the Vendor Reports menu.
3	Click on a vendor, and then on Run Report button.
4	Click on the printer button in the tool bar to print the report.

Mandatory Course Reports

Purpose

This option allows you to preview and print two reports.

- Mandatory Course Listing—lists all mandatory courses.
- Mandatory Course Status of Employees—list employees who have attended each course by course name.

NOTE: Training coordinators supporting several cost code must change cost codes to access reports for secondary cost codes.

Procedure Course Listing

To preview and print a Mandatory Course Listing report.

Step	Action
1	Click on Reports from the main menu.
2	Click on Mandatory Course Listing from the Mandatory Course Reports menu.
3	Click on the printer button the in the tool bar to print the report.

Procedure Course Status of Employees

To preview and print a Course Status of Employees report:

Step	Action
1	Click on Reports from the main menu.
2	Click on Mandatory Course Status of Employees from the Mandatory Course Reports menu.
3	Click on the printer button the in the tool bar to print the report.

Non-completion Reports

Purpose

This option allows you to preview and print two reports.

- Employee—displays non-completion report by employee.
- Cost Code—displays non-completion report for all employees within a cost code for a selected period of time.

NOTE: Training coordinators supporting several cost codes must change cost codes to access reports for secondary cost codes.

Procedure Employee

To preview and print a non-completion report by employee.

Step	Action
1	Click on Reports from the main menu.
2	Click on By Employee from the Non-completion Reports menu.
3	Click on an employee from the list.
4	Click on the printer button in the tool bar to print the report.

Procedure Cost code

To preview and print a non-completion report by cost code.

Step	Action
1	Click on Reports from the main menu.
2	Click on By Cost Code from the Non-completion Reports menu.
3	Screen displays a window in the upper-left hand corner of the screen. Enter the start date of the report. Click OK.
4	Enter the ending date of the report. Click OK.
5	Click on the printer button in the tool bar to print the report.

Reprint Tuition Assistance Agreement (TA) Form

Purpose

This option allows you to reprint the *Tuition Assistance Agreement*, which the employee must sign to receive tuition assistance.

Procedure

Step	Action
1	Click on Request Status from Actions menu.
2	Click on the employee and then click View.
3	Click on Reprint TA Form button.

EMPLOYEES' FREQUENTLY ASKED QUESTIONS

As a training coordinator you may receive many questions about training. Here are some of the most frequently asked.

I saw a brochure on a class that I want to take. What do I need to do?

First, look at the ***Training Announcements* on** Franchise Web page to see if that class, or a similar class, is being offered on-site. Next, talk to your supervisor. Be ready to discuss how this class will help you in your current position or benefit TTB as a whole. If your supervisor agrees to send you to the off-site class, then it's time to talk to your training coordinator. The training coordinator enters a training request into the Employee Development System (EDS).

Give your training coordinator the following information:

- Justification—a few lines explaining how the class will help you in your job.
- Completed registration form, if required by the vendor.
- Brochure, web page, or other background information.

I called the vendor to see if there is space available in a course. The course is almost full. Can I pre-register myself?

No—this could end up being an unauthorized procurement. Only BPD ED staff may register you for training (unless it's tuition assistance), because the training request has not been fully approved until BPD ED receives it. If the training request is disapproved, canceled or otherwise held up before reaching BPD ED—and no one notifies the vendor—TTB may have to pay for the course, even though you didn't attend.

Another reason not to give a vendor your name to hold a space in a class is that when the training request reaches BPD ED, its staff contacts the vendor to register you. The vendor doesn't always check to see if you're already registered, which could result in a double registration and double billing.

Your best bet is to plan ahead so that your training request is submitted and approved early enough to get into the class. Three to four weeks in advance is a good rule of thumb, but keep in mind that some classes fill up quickly and even more time may be necessary for high demand courses. Don't forget to check for a registration deadline imposed by the vendor and allow time to meet the deadline.

How long does it take to get registered in a course?

It depends. Once your training coordinator submits a training request in EDS, the system routes the request for approval. If everyone approves the request immediately upon receiving it, the request could go from the training coordinator to Training all in the same day. Once she receives the request, Wendy Robinson—the Human Resources Assistant—can usually register the employee within a few days.

Is there any way I can track the status of my training request?

You can check to see if your request is moving along by going to ***Your Training File*** on the Franchise Web Page and checking Request Status. You'll be able to see if the request is in an approving official's inbox or if the Human Resourses assistant has it (EDOffsite). Once you are registered in the class, the Status column will show "Selected." You can view your acceptance memo by clicking on "Selected."

What should I do with a vendor's registration form for an off-site class I'm going to attend?

You fill out the vendor's form and give it to your training coordinator who will send it with your training request to BPD ED.

I received a call from a training vendor about changes to the class I'm going to attend. With whom should I share this information?

If the call is about class changes—date, location, cost, etc.—refer them to BPD ED at 304-480-5234.

What's my responsibility when taking an after-hours class through tuition assistance?

Employees bear many responsibilities under TTB's tuition assistance program, which encourages employees seeking education outside work hours. Under this program, TTB pays all or part of the cost for single courses that help meet our mission and performance goals. Your tuition assistance justification must show that the class meets one of these criteria:

- improves organizational performance—at any level
- improves your current job performance
- allows for expansion or enhancement of your current job
- enables you to perform needed duties outside your present job but at the same level of responsibility
- meets organizational needs in response to human resource plans and re-engineering, downsizing, restructuring, or program changes.

Once your management and the Training Officer approve your request for tuition assistance, **you are responsible for course registration.** This is the only situation when you register yourself for training—normally only BPD ED staff may register employees for training. Finally, anyone requesting tuition assistance must sign the *Tuition Assistance Agreement*, provided by your training coordinator. This requires you to complete the course and earn a grade of "C" or better. Otherwise, you must reimburse TTB for the training cost. Give a copy of your grade slip to your training coordinator, who will send it to BPD ED with your course evaluation.

TRAINING COORDINATOR'S FREQUENTLY ASKED QUESTIONS

What information should I include when sending e-mails, regarding class participants, to the Training mailbox?

- Participant's name
- On-site or Off-site course
- Course title
- Date (s) of course
- Requested action—cancel, move to another session, substitute, etc
- If action is cancel, move, or substitute, please send:

  Reason for cancellation:
  Move from session _____ to session _____.
  Substitution name: _____
  Replace with alternate: _____
- Training Coordinator's name and extension

Always send these e-mails to the Training mailbox, rather than to an individual.

For an on-site class, can I change the class date instead of canceling an employee when the employee wants to attend a later session of the same class?

Yes. In your e-mail to the Training mailbox, state "Please move (participant's name) to the next available session" or state the session desired.

When I cancel employees from an on-site class, can I select other employees to attend in their place?

If your area has employees who are alternates for the class, please send a e-mail to the Training mailbox indicating the employee who can attend from your area who is already on the alternate list. **Remember:** Check with the supervisor and employee first.

How can I remove disapproved actions from my Request Status area in EDS?

Training Coordinators can only remove **onsite**-disapproved actions. To remove a disapproved training request, first view the request, then click on the Delete button.

How can I remove completed action from my Request Status area in EDS?

These actions disappear as soon as BPD ED closes out the course. Since BPD ED waits for participants to complete evaluations before closing out a course, these actions may not disappear immediately after class completion.

An employee wants to take a college course after hours. What do I need to provide to BPD ED?

Include a copy of the pages in the college catalog that has the tuition fee and the course description and attach to the signed "Tuition Assistance for Training" form being mailed to BPD ED.

Do I have to prioritize employees for training each time I submit nominations?

When you submit multiple nominations using the multi-select feature, and then have to submit others at a later time, remember to go to **Prioritize Requests** under you Actions menu in EDS and reprioritize your requests.

My office is going through reorganization, what do I do with the employees in EDS?

You will have to move your employees to their new training coordinator by going to **Employee Setup** and choosing the correct training coordinator.

What Managers and Supervisors are required to sign actions in EDS for training in my area?

This varies from one office to the next. You will need to check with the officials in your agency to find out who is required to sign each action. This is where the routing feature is important by using the **"Create Routing Slip"**. This allows you to create a list of approving officials so everyone knows who receives the request next.

I submitted a training request for an employee for a class coming up soon. I have not received an e-mail notification of the selection. What should I do?

Check the **Request Status** regularly to see the location of the request. If it is in a manager or supervisors box for more than a couple days, please follow up with the approving officials office to see if they are in.

For actions showing *offsite* for the location, they should be processed within three weeks after receiving them in the *offsite* location. If they remain in a *submitted* stage longer than three weeks, please contact BPD ED to find out why. It could be that we have not received a registration form or back up documentation.

What do I do if a vendor states they do not have a registration form?

Please provide BPD ED with any information you may have on the course. This could be a brochure, e-mail, or something from the Internet.