



# Training & Development Reporting System

User Manual

RCMC IT Department



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2016

## Introduction

This system was developed for members of the Training and Development Department at the RCMC. It is meant to efficiently store and share data between the CPR unit, Training unit, and the Secretary. It allows each user to replace their current manual methods of storing information by providing an application to do so for them.

From the application, a user can automatically share information with other users, and the user can create automatic reports of their data in Microsoft Word and Excel. Hopefully, this will increase efficiency and data communication in the department.

**This manual is for: Secretary.**

**Username: \_\_\_\_\_ Password: \_\_\_\_\_.**

## Scope

The Secretary uses the application to store all the data that goes into the Annual Report. There are 6 categories for the Secretary to store data under:

- Training Activities
- Symposiums and Conferences
- Medical Courses
- Continuous Medical Education
- Non Medical Courses
- COOP Trainees

The above categories all belong to the Annual Report, except COOP Trainees. However, the Secretary is also responsible for this data, so it is included in the secretary view.

The Medical Courses data automatically updates from the CPR unit; whenever a class occurs, the CPR unit will input the number of attendees into the system, and the secretary will receive the sum of all attendees for each CPR course.

The Training Activities data automatically updates from the Training unit; whenever the Training unit adds a new trainee to their application, the secretary will receive the sum of each trainee type.

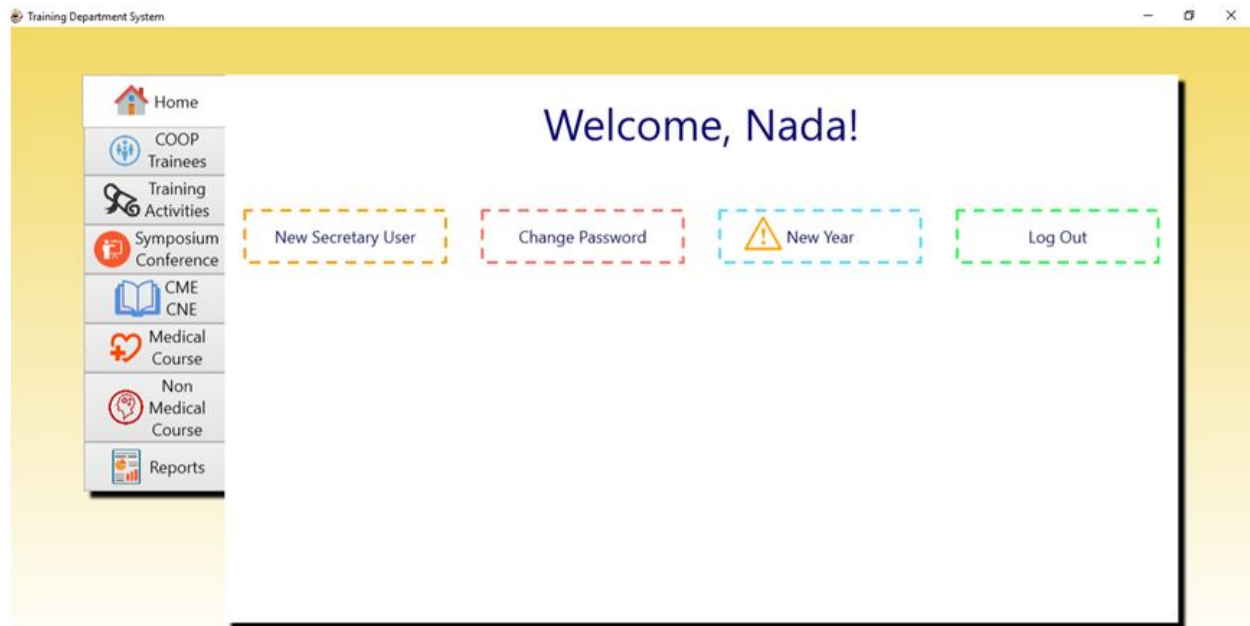
Additionally, the secretary can simply click a button, and all the charts and tables for the Annual Report will be created.

## Procedure

To open the application, open the TDS1 folder, then click TDS1 > bin > x86 > Release > TDS1.exe. If you right click TDS1.exe, you can create a desktop shortcut to the application.

For the application to work, your computer may ask you to download the **.NET 4.5 Package**. This is necessary, follow the steps the computer provides. Your computer also needs a version of Microsoft Word and Excel later than 2007.

The computer **MUST** connect to the RCEMPLOYEE network for the system to work. If it is not connected, the application will run very slowly or may crash. Simply close the application and connect if this occurs.



After logging in, you will see this screen. You can create a new user, who will also have access to the secretary responsibilities. You may also change your password and log out.

The **“New Year”** button is for clearing the application of all data. **ONLY** use this feature once you and the other users (CPR unit and

Training unit) have completed all the reports for the year. You share data with the other users, so clearing your application may clear theirs as well, even if they still need it. It **DELETES EVERYTHING**.

The screenshot shows a web application window titled "Training Department System". The main content area is titled "New COOP Trainee" and contains the following form fields:

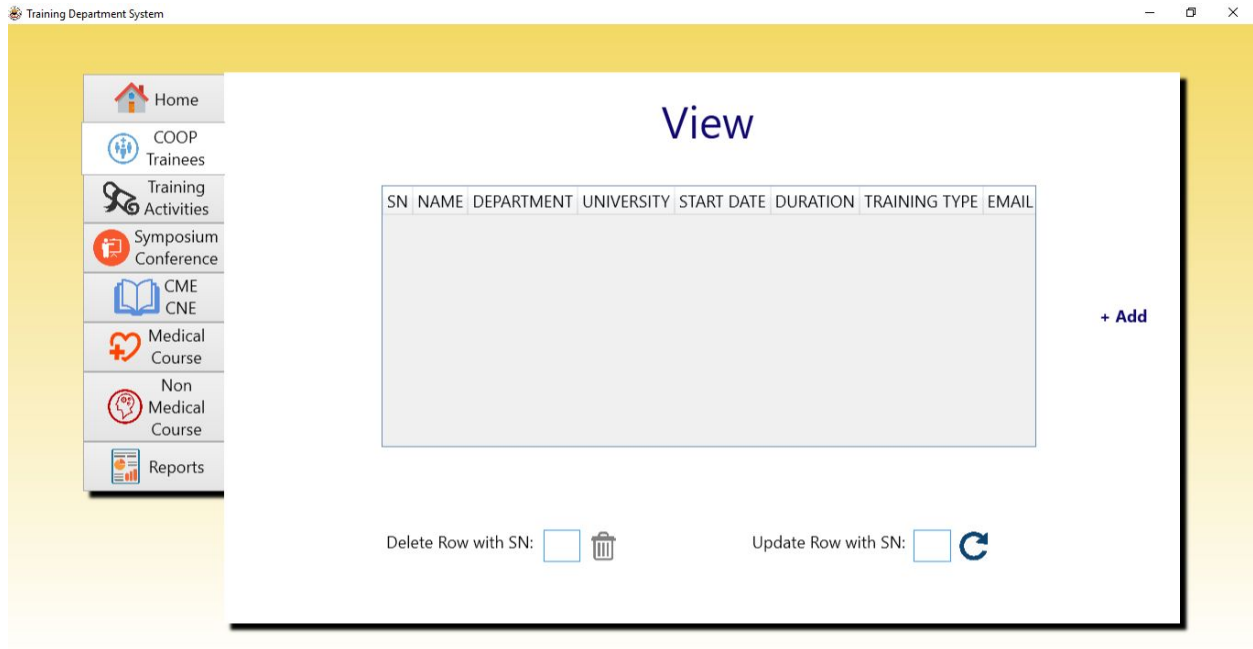
- Name\*:
- Dept\*:
- University\*:
- Start Date:
- Duration:
- Training Type\*:
- Email:
- Phone:
- Status:
- Note:

There is an "Add" button at the bottom right of the form and a "+ View" button on the right side. A sidebar on the left contains the following navigation tabs: Home, COOP Trainees, Training Activities, Symposium Conference, CME CNE, Medical Course, Non Medical Course, and Reports.

The tabs on the left side of the application are for each topic under your responsibility. Each will show you a form, as shown above, for adding new data to the topic.

Each topic has its own required fields. For example, COOP Trainees require a name, department, university and training type. Some categories can be chosen from a list, like department and training type. Other fields can have new values added, which can be chosen again later so you don't have to re-enter the value each time, like university and status.

The button "+View" on the right will take you to the following screen:

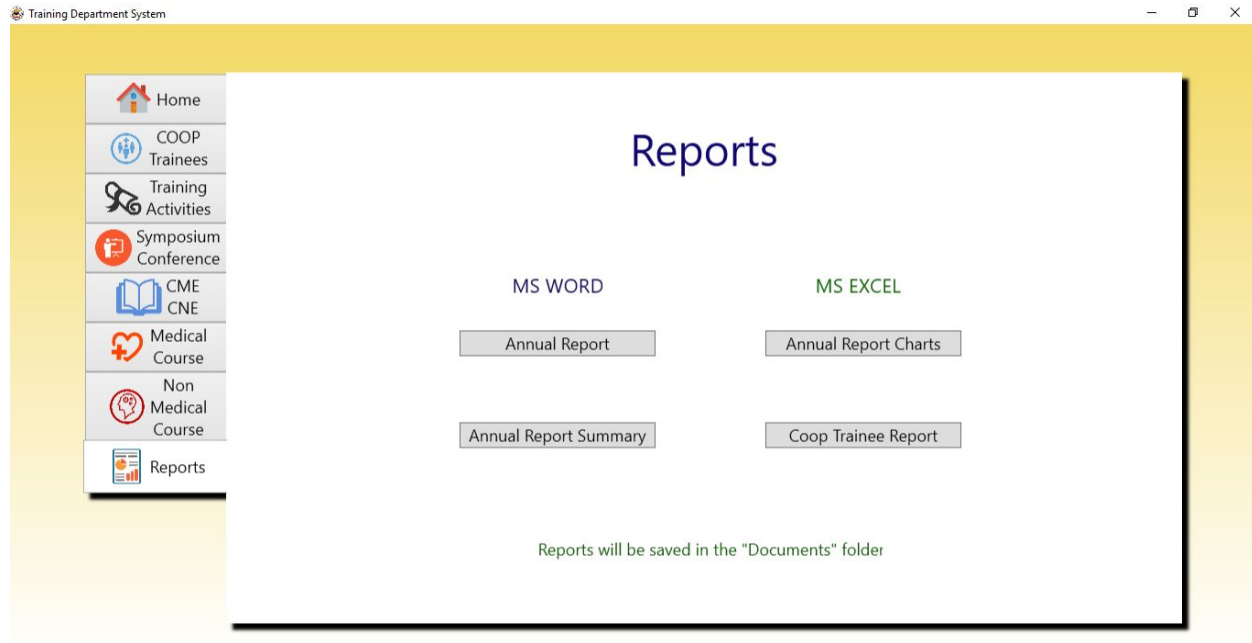


Each topic has a viewing screen. In the image, the box is blank and gray, meaning there is no data for that topic. When data is present, it will show up as rows, that can be easily copy and pasted into an Excel file.

Clicking on the column names at the top of the box (SN, Name, etc) will sort the data based on that column. If you want to delete a row, enter the number in that row's SN column into the box following "Delete Row with SN:" and press the garbage button. Do the same if you want to change a value in the row with the "Update Row with SN:" button. To return to the previous screen to add new values, press the "+Add" button on the right.

**NOTE:** Each different topic operates the same way for adding, viewing, deleting and updating items. There are some validation requirements as well. For example, in fields like "Attendees", "Phone" and "Credit Hours", the system will only allow you to enter numbers. Also, if you try to enter a value into a "Department" field that isn't already in the list, it will be automatically cleared. These are all to prevent incorrect data from being entered into the system.

**CAUTION:** New values entered into the “University” or “Training Type” fields CAN NOT be deleted or edited later. Make sure they are spelled correctly and that they don’t already exist in the list.



From the Reports tab, you can create your annual report. The button that says “Annual Report” will create tables for each of the 5 topics included.

The “Annual Report Summary” button creates the summary tables based off all the data in the system. Both reports are Microsoft Word documents.

The “Annual Report Charts” button creates an Excel file with graphs for each topic in the report (each in a different worksheet).

And Finally, the “Coop Trainee Report” button creates a simple Excel spreadsheet with each COOP trainee’s info.

**NOTE:** Creating reports of any kind using the application will sometimes cause Microsoft Word/Excel to open “Background Processes” of Word/Excel. These can cause small problems in the future. It is best to always open your computer’s Task Manager, select them and choose “End Task” to eliminate any issues.

**CAUTION:** Do not create a new report of any kind if there is already a report of the same name in the folder it will be saved. This will crash the system. Also, clicking “Cancel” instead of “Save” when the application asks you to save the document will crash the system. Always save it, then delete later if you don’t need it.