

Personnel Manager Basic Training Checklist

Start Time End Time Total Duration of Breaks
 Standard 10:00 16:00 (Max 1.5 hrs)

Customer _____ Location _____
 Attendees _____ Job Titles _____

 Trainer _____ Date _____

Introducing Personnel Manager [PM]	Requested	Covered
Launching & exiting P.M.		
Logging in		
Opening Databases		
Creating a New Database		
Pull-down menus & Toolbars		
Navigating through Shortcut Bar		
Summary/Detail/Attached Documents screens		
Navigation control buttons		
Field Types - Pick lists, Calendar buttons, Text, Calculated etc.		

Setting up Personnel Manager	Requested	Covered
Company Settings (Inc. Absence Allowances)		
Diary Triggers		
Career Triggers		
Options		

Working With Records	Requested	Covered
Creating New Employee Records		
Employee Details - Contract/Pay/Personal/Dates/Working Time		
Pay History		
Vehicle Usage		
Absence - Assign individual Allowances		
Absence - Recording Holidays and Sickness		
Absence Calendar		
Absence Schedule		
Filtering Records		
Printing Record Cards		
Editing/Deleting Records		

Sorting and Locating Records	Requested	Covered
Sorting Records		
Quick Finding Records (Q-find)		
Grouping Employees (Create, Select, Edit, Delete)		
Filtering Employees (Table, Field, Operator, Value)		

Personnel Manager Diary	Requested	Covered
Viewing the dairy		
Moving through dates		
Inserting appointments/reminders		
Printing days in diary		
The Diary Monitor (Checking/Deactivating)		
Reminder pop-up window		
Outlook Diary		

Word Processing & Mail Merging	Requested	Covered
Set My Record/ Go to My Record		
Writing standard letter		
Modifying existing letter templates		
Creating new letter templates		
Copying existing letters into Personnel Manager		
Creating Mailing Labels		
Correspondence History		
Attaching a document		

Query Builder	Requested	Covered
Accessing the Query Builder		
Creating a New Query		
Previewing & Editing an Existing Query		
Define Search Tab Overview		
Adding Fields		
Editing Field Properties (Width, Sort)		
Filtering Queries (Screen, Field, Operator, Value)		
Printing Queries (Print Setup)		
Exporting Queries (Importing Text Files into Excel)		

Additional Details

Signature:- _____
(On behalf of Customer)

Signature:- _____
(On behalf of Agathon Consulting Ltd)

Print Name:- _____
(On behalf of Customer)

Print Name:- _____
(On behalf of Agathon Consulting Ltd)

Date:- ____/____/____

Date:- ____/____/____