



Ministry of Health, Kenya

# Integrated Human Resources Information System (iHRIS) Train

## *iHRIS Train Users Manual*

Version 1.0

JULY 2013



*"This publication is made possible by the generous support of the American people through the United States Agency for International Development (USAID). The contents are the responsibility of IntraHealth International and do not necessarily reflect the views of USAID or the United States Government."*



# Table of Contents

<b>1</b>	<b>Introduction</b>	<b>1</b>
1.1	Background	1
1.2	Accessing iHRIS Train	2
1.2.1	Log in	2
1.3	iHRIS Train Modules and Features	3
<b>2</b>	<b>Administering Users</b>	<b>3</b>
2.1	User Roles	3
2.2	Add a User	4
2.2.1	Update a User	5
2.2.2	Change Your Password	6
2.2.3	Retrieve a Forgotten Password	7
2.3	Log Out	7
<b>3</b>	<b>Manage People</b>	<b>8</b>
3.1	Add Person	8
3.2	Add Individual Information	10
3.2.1	Add Passport Photo	10
<b>4</b>	<b>Manage Training Providers and Trainings</b>	<b>10</b>
4.1	Add Training Provider	11
4.2	Add Training	11
4.3	Schedule training	12
4.4	View Trainings	13
4.5	Add participants to training	14
4.6	Adding fees	15
4.7	Adding Person to Training via person page	17
<b>5</b>	<b>Search Records</b>	<b>18</b>
5.1	Search People	18
5.2	Search Training Provider	19
<b>6</b>	<b>Reports</b>	<b>21</b>
6.1	Tabular report formats	22
6.2	Graphical Report Formats	25
6.3	Report Views	25
6.3.1	Creating and Editing report views	25
<b>7</b>	<b>Administer Database</b>	<b>28</b>
7.1	Add Academic Level	28
7.2	Add a Country	29
7.3	Add Training Course	30
7.1	Add Training Classification/Cadres	31

## List of Abbreviations and Acronyms

CD	:	Compact Disk
CSV	:	Comma Separated Values
DHO	:	District Health Officer
DVD	:	Digital Video Disk
HMIS	:	Health Management Information System
HR	:	Human Resource
HRHIS	:	Human Resource for Health Information System
HRIS	:	Human Resource Information System
HRM	:	Human Resource Management
iHRIS	:	Integrated Human Resource Information System
IT	:	Information Technology
LAN	:	Local Area Network
MoH	:	Ministry of Health
OPEN MRS	:	OPEN Medical Records System
USAID	:	United States Agency for International Development

# 1 Introduction

## 1.1 Background

The **integrated Human Resource Information System (iHRIS)** is a computerized Human Resources (HR) management tool consisting of electronic databases for storing, reporting, and analyzing that enables to design and manage a comprehensive HR strategy. It is built on free, open source software distributed under the General Public License (GPL), to minimize maintenance costs and ensure sustainability.

**iHRIS will benefit MoH, and stakeholders by supporting** the ministry to increase efficiency by strengthening the management of human resource (HR) data through tracking the persons undergoing different in-service and pre-service trainings, training opportunities available, graduation times in different organizations to reduce on duplication and improve equity.

This will be **achieved through deployment of iHRIS** that will enable HR managers at different levels to collect, manage, and analyze HR data (bio-data, training details, employment history and status, staffing levels in organizations, and where employees are deployed) to facilitate in the management of training programs and trainees including the entry, pipeline and graduation details by program area and linkages with each training institution for both in-service and pre-service training.

There are five components of the iHRIS designed to support the key HRH functions of **planning** (iHRIS Plan), **training** (iHRIS Train), regulation **qualifications**, registration and licensure (iHRIS Qualify), **management** (iHRIS Manage) and **retention** of the health workforce (iHRIS Retain).

**iHRIS Train** captures analyses data on training programs and trainees including the entry, pipeline and graduation details by program area; and information on training institutions for both in-service and pre-service training. It helps to track progress on curriculum implementation, performance of students, training experience of individual health workers, tracking of credit hours for renewal of license among other things. It also provides information on training opportunities for health workers. This system facilitates coordination of training of health workers, reduction of duplication, and ensuring equity.

### Development and use of iHRIS Train

iHRIS Train was developed to respond to information needs in the management of training of health workers in Kenya, and focuses on:-

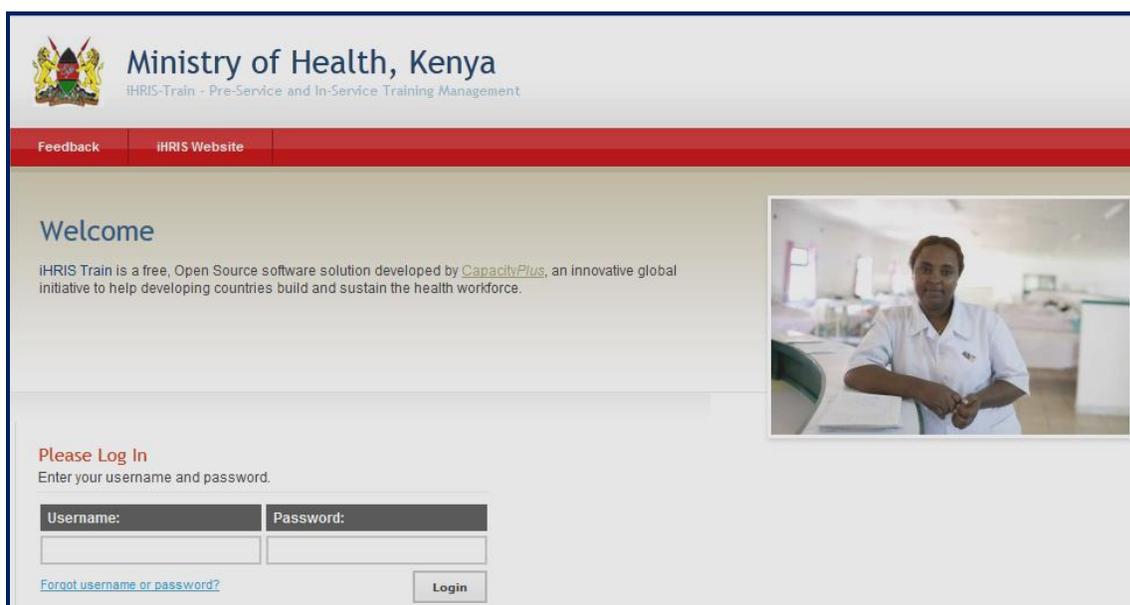
- Training courses: types, content, schedule, length of training, target group, and how conducted including methods used and contribution to CPD
- Organizations/institutions carrying out training, and training provided, sources of funding for training
- Management of training by different organizations
- Competencies needed for/or to be acquired in relation to the training
- Profiles of trainees - their bio-data, qualifications, and place of work
- Tracking attendees of various courses and timing
- Cost of training
- Performance of trainees

## 1.2 Accessing iHRIS Train

iHRIS Train is a database management system which can be accessed on LAN or internet. The pre-service is located on the MoH servers and it is accessible by selecting it (see figure below).

### 1.2.1 Log in

To gain access to the system, you must have a user account. Type your user name and password and click **login** (see figure below)



The screenshot shows the login interface for the iHRIS Train system. At the top left is the Ministry of Health, Kenya logo and the text "Ministry of Health, Kenya" and "iHRIS-Train - Pre-Service and In-Service Training Management". Below this is a red navigation bar with "Feedback" and "iHRIS Website" links. The main content area features a "Welcome" message and a description of the system. A photograph of a healthcare worker in a white uniform is displayed on the right. The login section includes a "Please Log In" heading, a prompt to "Enter your username and password", and two input fields labeled "Username:" and "Password:". A "Login" button is positioned to the right of the password field. A link for "Forgot username or password?" is located below the input fields.

*Note: If you do not have a user account, send a request to [ihriskenya@intrahealth.org](mailto:ihriskenya@intrahealth.org).*

## 1.3 iHRIS Train Modules and Features

To get started using iHRIS Train, please click one of the options as explained below

 **Manage People**  
Add a new employee record to the system, and search for and update records that have been entered into the system.

---

 **Manage Training Providers**  
Add a new training Provider record to the system

---

 **Search Records**  
Locate any employee or position record in the system to review, print or update.

---

 **View Reports**  
Reports enable analysis of human resource data in various ways. Customize, display and print staff lists, statistical charts and other standard reports.

---

 **Configure System**  
Configure modules, administer positions, customize drop down menus and create or update user accounts.

---

 **Change Password**

## 2 Administering Users

### 2.1 User Roles

There are several types of users for the system with different privileges and access.

- a. **Executive:** This user is limited to viewing data only but cannot modify any data
- b. **Training Manager:** This encompasses anyone who may be giving, organizing or funding trainings. Each will have a type of: donor, partner, training institution. They will be able to add participants and instances of trainings as well as log evaluations for the participants and trainings.
- c. **System Administrator:** The administrator will be able to manage the entire system

## 2.2 Add a User

In order to allow a user to access the system, the System Administrator must create a user account for the person, with a unique username and password. Each user is assigned a role, which determines the actions that the user can perform in the system.

On the Home page or left menu, navigate to **Configure System->Administer Users** to create, update and disable user accounts to enforce secure access to the system. Only the System Administrator can add and update user accounts.



Select **Add New User** from the dropdown menu and click the Add button to get figure

Enter a **Username** for the user: one word with no special characters (letters and numbers only). Enter the **First Name** and **Surname** of the user. Enter an **Email** for the user, if known (optional).

Select the **Role** of the user. If no role is selected, the user will be disabled and cannot access the system in any capacity.

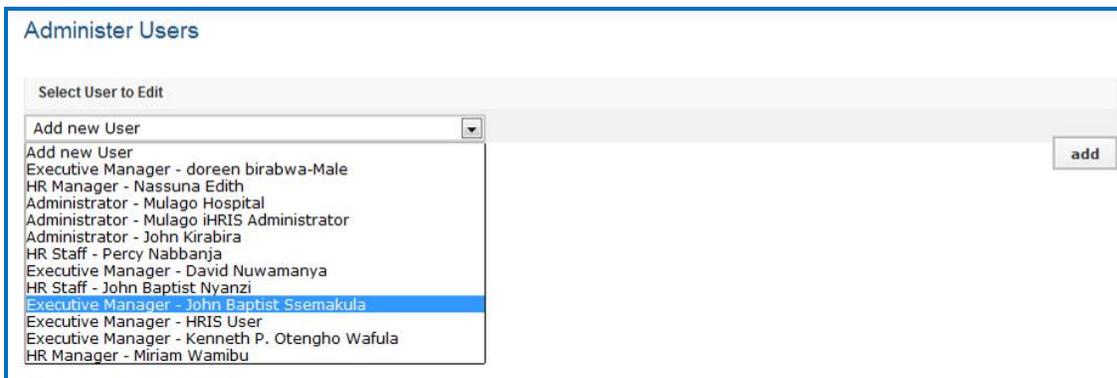
Select the option to randomly **Generate New Password** or enter a **Password** for the user. If the password is entered, re-enter it to confirm. The two passwords must match.

**Click Confirm** and verify that the account entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

If an email address was entered, an email message will be sent to the user with the username and password. Otherwise, you will have to provide the user with the username and password.

### 2.2.1 Update a User

To change user information, click **Configure System** and then Click **Administer Users**. From the drop down menu select the user account to change.



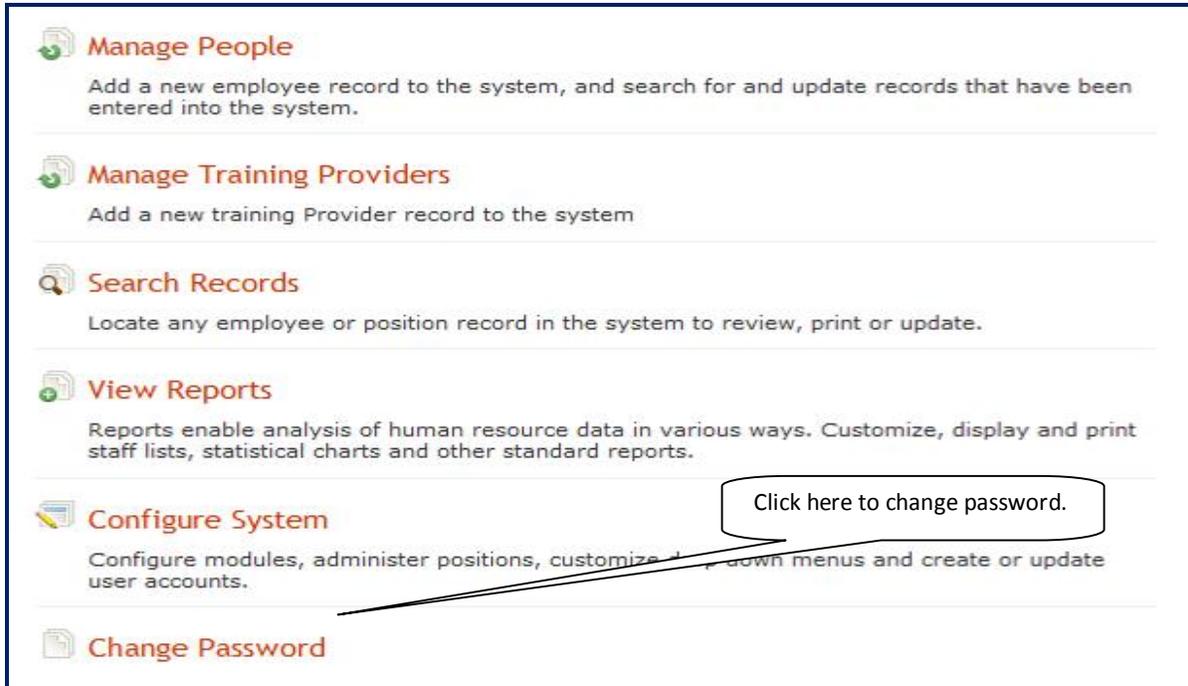
The screenshot shows a web interface titled "Administer Users". At the top, there is a header "Administer Users". Below it, there is a section "Select User to Edit" which contains a dropdown menu. The dropdown menu is currently open, showing a list of user accounts. The first item is "Add new User" with a small downward arrow to its right. Below this, there is a list of user accounts, each with a role and name: "Executive Manager - doreen birabwa-Male", "HR Manager - Nassuna Edith", "Administrator - Mulago Hospital", "Administrator - Mulago iHRIS Administrator", "Administrator - John Kirabira", "HR Staff - Percy Nabbanja", "Executive Manager - David Nuwamanya", "HR Staff - John Baptist Nyanzi", "Executive Manager - John Baptist Ssemakula" (which is highlighted in blue), "Executive Manager - HRIS User", "Executive Manager - Kenneth P. Otengho Wafula", and "HR Manager - Miriam Wamibu". To the right of the dropdown menu, there is a button labeled "add".

Update the user account.

*Note: Usernames and passwords may also be changed. If a user no longer has access to the system, the account can be disabled.*

## 2.2.2 Change Your Password

At any time, you can change your password for logging into the system. The Change Password form opens.



Clicking on change password, you get figure below

The screenshot shows the "Change Password" form in the IHRIS-Train system. The form is titled "Change Password" and is located in the main content area. The form has a sidebar on the left with the following menu items: Manage Trainings, Manage People, Search Records, View Reports, Configure System, and Change Password. The form contains three input fields: "Old Password:", "New Password:", and "Confirm New Password:". A "change password" button is located at the bottom right of the form.

Enter your **Old Password** (current password). Enter the desired **New Password**. Re-enter the new password under **Confirm New Password** to confirm it. Click **Change Password**. This will reset to the new password.

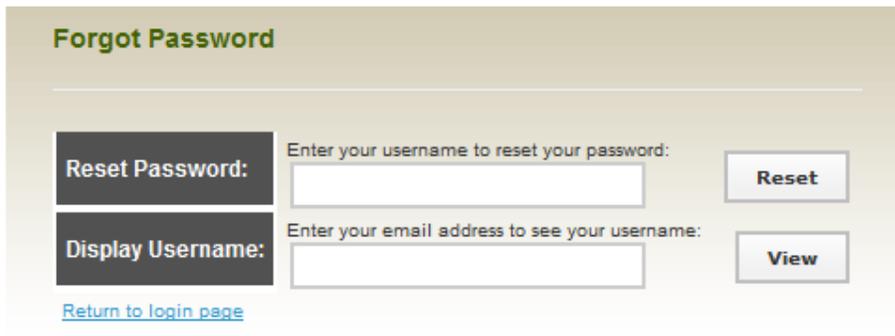
### 2.2.3 Retrieve a Forgotten Password

Contact system administrator in case you have forgotten your password or username

**OR** From the Log In page, click **Forgot username or password?**

To reset the password, enter your **Username** in the box next to "Reset Password" and click the **Reset** button. The system will email your new password to you

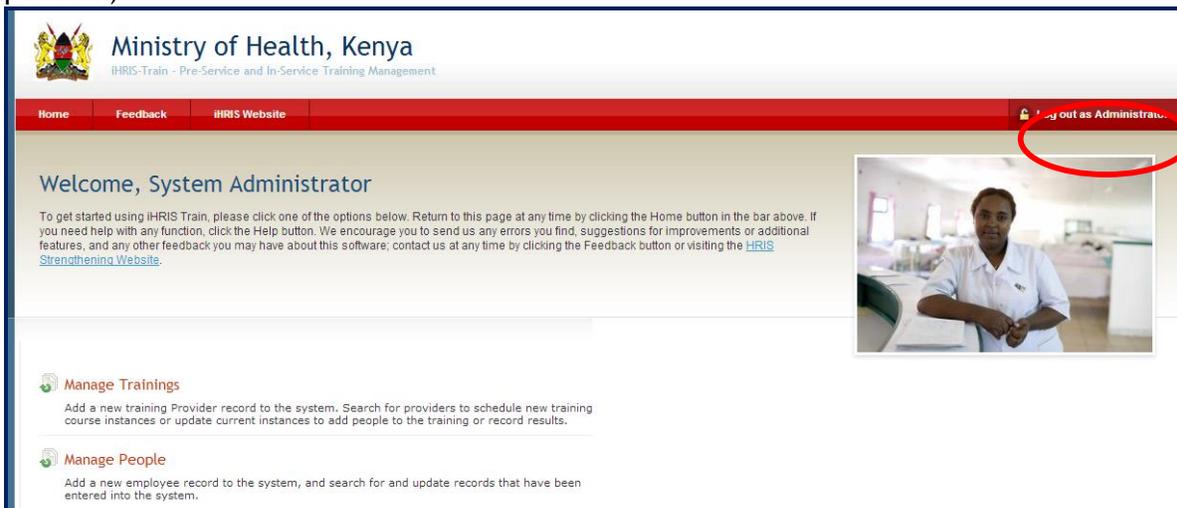
To recover your username, enter your **Email Address** in the box next to "Display Username" and click the View button. The system will display your username.



Click the link to **Return to login page** and log in as normal

## 2.3 Log Out

When you are finished working in the system, log out to prevent any unauthorized person from accessing the system. In the upper left corner on any page, click Log out (next to the padlock)

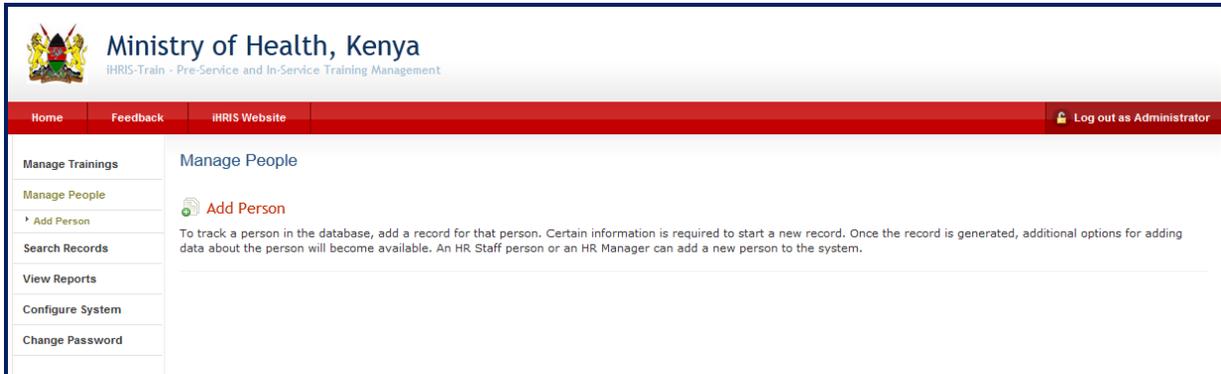


### 3 Manage People

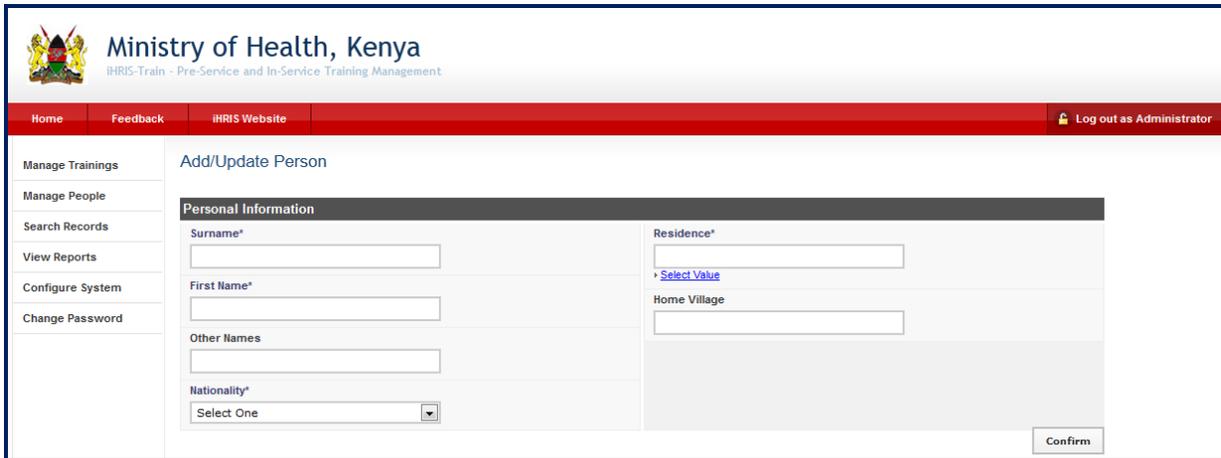
Click [Manage People](#) to add new persons' details into system.

#### 3.1 Add Person

To track a person in the database, add a record for that person by clicking the [Add Person](#).



You will get the input screen as below



Enter the person's **Surname**, **First Name** and any **Other Names** in the appropriate fields. Select the person's **Nationality** from the dropdown menu. Click on **“Select Value”** to choose the name of the person's country, region, district, sub-county of residence under **Residence**. Type the parish where the person comes from.

Click Confirm, the data that you just entered will appear as below.

Ministry of Health, Kenya  
iHRIS-Train - Pre-Service and In-Service Training Management

Home Feedback iHRIS Website Log out

Manage Trainings  
Manage People  
Search Records  
View Reports  
Configure System  
Change Password

### Add/Update Person

**Personal Information**

Surname Abdalla	Residence Garissa Township, Garissa County, Kenya
First Name Yusuf	Home Village
Other Names	
Nationality Kenya	

Edit Save

Confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. The person's new record opens with options to add additional information divided into sections.

This record has been saved.  
View Person: Abdalla, Yusuf

**Individual Information**

▼Hide | [Add Identification](#) | [Add Demographic Information](#) | [Add Education Information](#) | [Add Registration Information](#) | [Add Passport Photo](#)

Edit This Information

- [Update this Information](#)
- [View Name History](#)

Name / Nationality	
Surname:	Abdalla
First Name:	Yusuf
Other Names:	
Nationality:	Kenya
Residence:	Garissa Township, Garissa County, Kenya
Home Village:	

**Education Information**

▼Hide | [View Education History](#)

**Registration Information**

▼Hide | [View Registration History](#)

Note that you can click the Hide/Expand option at the top of any section to hide or display that section. You can edit or update a person's record at any time by searching for the record

## 3.2 Add Individual Information

Immediately after a person has been added to the system, the person's record displays, the next step is to **add identification, add demographic information, add education information, add passport photo, contact information, and trainings**. All are entered using the same steps as demonstrated below when adding passport photo

### 3.2.1 Add Passport Photo

Click **Add passport photo** tab under the individual information to get the window below

The screenshot shows a web form titled "Add/Update Passport Photo" for the user "Abdalla, Yusuf". The form has a "Passport Photo" section with an "Image" field containing a "Browse..." button and the text "No file selected.". Below this are two fields: "Date\*" with the value "July 22, 2013" and "Description" which is empty. A legend indicates "\* - Required Field". At the bottom, there are two buttons: "return (do not save changes)" and "Confirm".

## 4 Manage Training Providers and Trainings

Click on **Manage Training Provider** to get the window below which enables to **add a new training provider** and **find training provider** where trainings can be created

The screenshot shows a web interface with a red navigation bar at the top containing "Home", "Feedback", "iHRIS Website", and "Log out as Administrator". A left sidebar menu includes "Manage People", "Manage Providers" (with sub-items "Add Training Provider" and "Find Training Provider"), "Search Records", "View Reports", "Configure System", and "Change Password". The main content area is titled "Manage Trainings and Training Provider" and features two primary actions: "Add a New Training Provider" (with a plus icon) and "Find Training Provider" (with a magnifying glass icon). The "Add a New Training Provider" section includes the text "Add a new training Provider record to the system". The "Find Training Provider" section includes the text "After entering an a training provider and training record into the system , the record may be reviewed at any time. Click Find Training Provider to locate the record. From the record, additional information can be added or existing information can be updated."

## 4.1 Add Training Provider

Selecting Add a New Training Provider to get the figure below

Add/Update Training Provider

**Training Provider Information**

Name\*

Telephone Number

Training Provider Type\*

Select One

Alternate Telephone Number

Code

Mailing Address

Ownership

Select One

Intake Capacity

Fax Number

Email Address

Primary Contact Person

return (do not save changes)

Confirm

Enter the training provider's **name**, **type of training** and any **contacts** in the appropriate fields. Click **Confirm**, review the information, and **save**

## 4.2 Add Training

For each training provider, you have to add the different training offered. Click on Add Training

**Training Provider Information**

Hide | Add Training

Edit This Information

- Update this Information

Name	
Name:	Pwani College
Training Provider Type:	Government
Code:	
Ownership:	Government
Intake Capacity:	300
Telephone Number:	0722203447/8/9
Alternate Telephone Number:	
Mailing Address:	P.O Box 3345-00560
Fax Number:	
Email Address:	info@pwanicollege.or.ke
Primary Contact Person:	Michaela Kalume

To add a training on the provider

It gives a window below

Administer Database: ProviderTraining Information

**ProviderTraining Information**

Training Provider\*  
Pwani College

Training\*  
Select One

\* - Required Field  
Confirm

return (do not save changes)

Select training provider and training. Click **Confirm**, review the information, and **save**

### 4.3 Schedule training

On the select View Provider

**ProviderTraining Information Information**

[Edit This Information](#)

- [Update this Information](#)
- [Select another Provider Training](#)
- [View Provider](#)

Training Provider:	Pwani College
Training:	Cervical Cancer Screening

To View Provider Details

This will give you the figure below showing the different trainings the provider offers

**Training Provider Information**

[Hide](#) | [Add Training](#)

[Edit This Information](#)

- [Update this Information](#)

Name:	Pwani College
Training Provider Type:	Government
Code:	
Ownership:	Government
Intake Capacity:	300
Telephone Number:	0722203447/8/9
Alternate Telephone Number:	
Mailing Address:	
Fax Number:	
Email Address:	<a href="mailto:pwanicollege.or.ke">pwanicollege.or.ke</a>
Primary Contact Person:	Michaela Kalume

Click here to schedule training

**Training Information: Cervical Cancer Screening**

[Hide](#) | [Scheduled a new Training](#) | [View All Trainings](#)

Click schedule a new training to get the screen below

**Schedule a Training for In-Service Training (Short)**

Provider Training  
Pwani College - Cervical Cancer Screening

Start Date\*  
July 22, 2013

End Date\*  
July 26, 2013

Target Group(s)  
Clinical Officer  
Counselors  
Health Administration  
Health Records Information Officer  
Medical Doctor

Source Of Funding  
Select One

Location Details\*

[return \(do not save changes\)](#) [Confirm](#)

Select the start and end dates and location where the training will take place, confirm and save.

#### 4.4 View Trainings

Click on view trainings to see all the trainings that training provider is offering

**Training Provider Information**

[Hide](#) | [Add Training](#)

**Edit This Information**

- [Update this Information](#)

Name	
Name:	Pwani College
Training Provider Type:	Government
Code:	
Ownership:	Government
Intake Capacity:	300
Telephone Number:	0722203447/8/9
Alternate Telephone Number:	
Mailing Address:	P.O Box 3345-00560
Fax Number:	
Email Address:	info@pwanicollege.or.ke
Primary Contact Person:	Michaela Kalume

**Training Information: Cervical Cancer Screening**

[Hide](#) | [Scheduled a new Training](#) | [View All Trainings](#)

**Edit this Information**

- [Update this Information](#)
- [View Scheduled Training Details](#)

Scheduled Training Course	
Start Date:	28 October 2013
End Date:	30 October 2013
Source Of Funding:	USAID
Target Group(s):	Clinical Officer
Location Details:	Mombasa

Click here to view scheduled training

## 4.5 Add participants to training

Click of View scheduled training details

Training Provider: [Pwani College](#)

View Scheduled Training Courses: [Pwani College - Cervical Cancer Screening](#)

**Scheduled Training Details**

[Hide](#) | [Add Participants](#) | [Upload Participants](#)

**Edit This Information**

- [Update this Information](#)
- [Add Fee](#)

Scheduled Training	
Provider Training:	Pwani College - Cervical Cancer Screening
Start Date:	22 July 2013
End Date:	26 July 2013
Target Group(s):	Clinical Officer,Nurse
Source Of Funding:	USAID
Location Details:	Pwani College, St Lucia Building, Room 217

**Scheduled Training Fees**

[Hide](#)

**Participant Details**

Click here to add participants to training

It gives the screen below used to add participants

**Scheduled Training Courses: [Pwani College - Cervical Cancer Screening](#)**

**Search Person**

Search all people in the system

Results limited by: Job/Post Title: Clinical Officer, Nurse

Click here to add participants to training

Add/Remove Participant	#	First Name	Last Name	Gender	Job/Post Title	Health Facility
<a href="#">Add Participant</a>	1	<a href="#">Rita</a>	<a href="#">Matoke</a>	Female	Clinical Officer	
<a href="#">Add Participant</a>	2	<a href="#">Marcia</a>	<a href="#">Hussein</a>	Female	Clinical Officer	Ma
<a href="#">Remove Participant</a>	3	<a href="#">Evalyne</a>	<a href="#">Kogi</a>	Female	Clinical Officer	Ma
<a href="#">Add Participant</a>	4	<a href="#">Gideon</a>	<a href="#">Mailu</a>	Male	Clinical Officer	E

Click here to add participants to training

After adding the participants, those add will be indicated with remove participants. Also the system will indicate those who will be attending the training and provision to add fees as below

**View Scheduled Training Courses: Pwani College - Cervical Cancer Screening**

**Scheduled Training Details**

▼Hide | [Add Participants](#) | [Upload Participants](#)

**Edit This Information**

- [Update this Information](#)
- [Add Fee](#)

**Scheduled Training**

Provider Training:	Pwani College - Cervical Cancer Screening
Start Date:	22 July 2013
End Date:	26 July 2013
Target Group(s):	Clinical Officer,Nurse
Source Of Funding:	USAID
Location Details:	Pwani College, St Lucia Building, Room 217

**Scheduled Training Fees**

▼Hide

**Participant Details**

▼Hide | [Add Exam Numbers](#) | [Paper I Results](#) | [Paper II Results](#) | [Paper III Results](#) | [Results](#)

**Edit This Information**

	First Name	Surname	Exam Number
<a href="#">Update this Information</a>	Benjamin	Kooi	
<a href="#">Update this Information</a>	Benjamin	Nieru	
<a href="#">Update this Information</a>	Martin	Mwangi	
<a href="#">Update this Information</a>	Alice	Munene	
<a href="#">Update this Information</a>	Zwena	Jamin	

Click here to add fees for training

Participants added to the training

### 4.6 Adding fees

Click on add fees to get

**Add/Update Fee Information**

Pwani College - Cervical Cancer Screening

**Edit Fee**

Fee\*

Tuition fee - Per Student , Day(s) ▼

Amount\*

Kes KSh ▼ 34,000

Confirm

Select the fees type and amount, then confirm and save to get the figure below

**View Scheduled Training Courses: Pwani College - Cervical Cancer Screening**

---

**Scheduled Training Details**

[Hide](#) | [Add Participants](#) | [Upload Participants](#)

Edit This Information	Scheduled Training	
<ul style="list-style-type: none"> <li><a href="#">Update this Information</a></li> <li><a href="#">Add Fee</a></li> </ul>	Provider Training:	Pwani College - Cervical Cancer Screening
	Start Date:	22 July 2013
	End Date:	26 July 2013
	Target Group(s):	Clinical Officer,Nurse
	Source Of Funding:	USAID
	Location Details:	Pwani College, St Lucia Building, Room 217

---

**Scheduled Training Fees**

[Hide](#)

Edit This Information	Fee	
<ul style="list-style-type: none"> <li><a href="#">Correct this Information</a></li> </ul>	Fee:	Tuition fee - Per Student , Day(s)
	Amount:	Kes KSh34,000

---

**Participant Details**

[Hide](#) | [Add Exam Numbers](#) | [Paper I Results](#) | [Paper II Results](#) | [Paper III Results](#) | [Paper IV Results](#)

Edit This Information	First Name	Surname	Exam Number
<a href="#">Update this Information</a>	<a href="#">Evalyne</a>	<a href="#">Kogi</a>	
<a href="#">Update this Information</a>	<a href="#">Benjamin</a>	<a href="#">Nieru</a>	
<a href="#">Update this Information</a>	<a href="#">Martin</a>	<a href="#">Mwanqi</a>	
<a href="#">Update this Information</a>	<a href="#">Alice</a>	<a href="#">Munene</a>	

## 4.7 Adding Person to Training via person page

Also participants can be added to training by going to persons page, then clicking on add training

### Individual Information

[Hide](#) | [Add Identification](#) | [Add Education Information](#)

<b>Edit This Information</b>	<b>Name / Nationality</b>
<ul style="list-style-type: none"><li><a href="#">Update this Information</a></li><li><a href="#">View Name History</a></li></ul>	Surname: Wadembere
	First Name: Ismail
	Other Names:
	Nationality: Uganda
	Residence: BUSOLWE, BUTALEJA, Eastern, Uganda
	Parish: Doho

<b>Edit This Information</b>	<b>Passport Photo</b>
<ul style="list-style-type: none"><li><a href="#">Update this Information</a></li><li><a href="#">View Photo History</a></li></ul>	

<b>Edit This Information</b>	<b>Demographic Information</b>
	Date of Birth: 8 August 1973
	Gender: Male

### Education Information

[Hide](#) | [Add Education Information](#) | [View Education History](#)

### Contact Information

[Hide](#) | [Add Work Contact](#) | [Add Other Contact](#) | [Add Emergency Contact](#)

<b>Edit This Information</b>	<b>Personal Contact</b>
<ul style="list-style-type: none"><li><a href="#">Update this Information</a></li></ul>	Mailing Address: P. O. Box 27619 Kampala
	Telephone Number: 0772472922
	Mobile Phone Number: 0702472922
	Alternate Telephone Number:
	Fax Number:
	Email Address: iwadembere@intrahealth.org
	Notes: Work email

**Trainings**

[Hide](#) | [Add Training Course](#) | [View History](#)

Click to add training

Gives the screen below to enter the training details

### Add/Update Scheduled Trainings

Maina, Esther

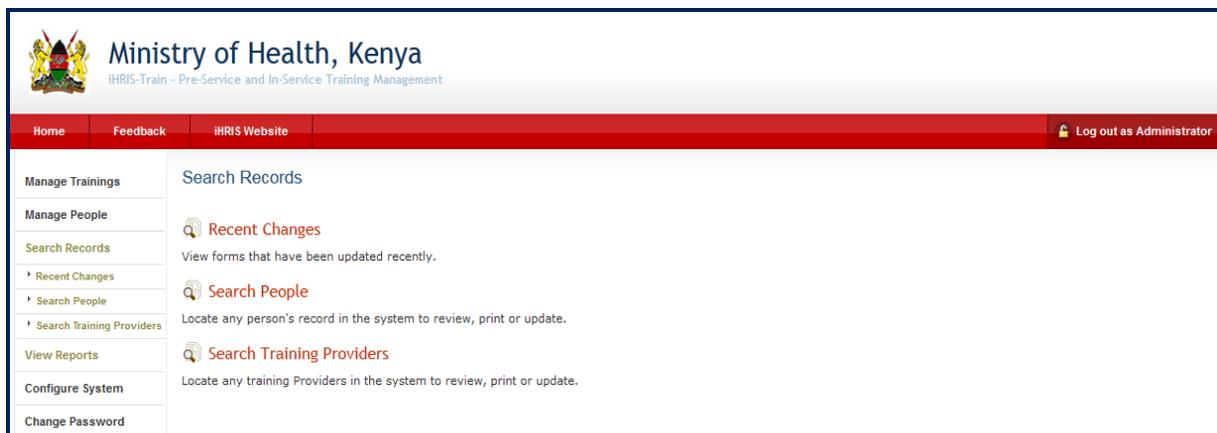
<b>New Scheduled Training Course</b>	Comments
Instance Pwani College - Cervical Cancer Scree	<input type="text"/>
Exam Number <input type="text"/>	Is Attending Yes

\* - Required Field

## 5 Search Records

After entering an employee or position in the system, the record may be reviewed at any time.

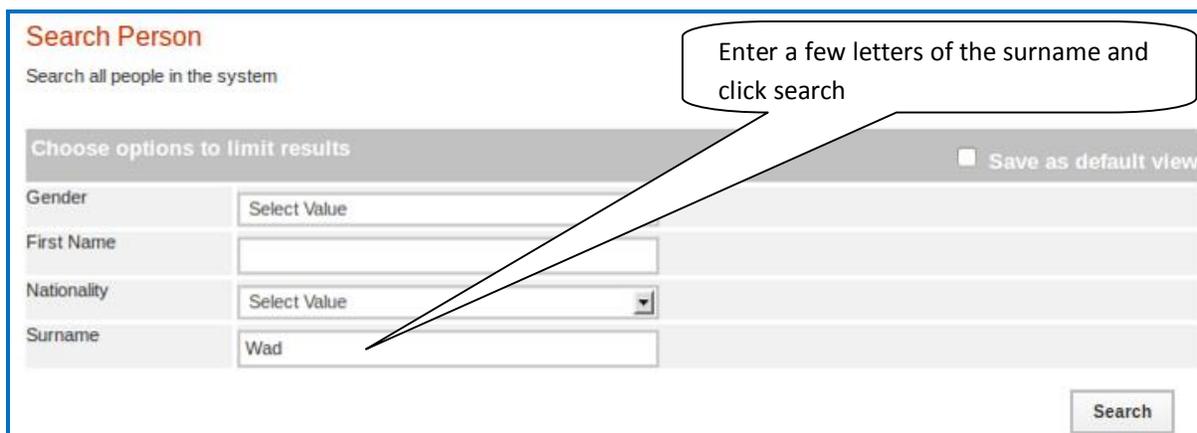
Click **Search Records** to locate the record. From the record, additional information can be added or existing information can be updated.



The screenshot shows the iHRIS-Train interface for the Ministry of Health, Kenya. The header includes the logo and the text "Ministry of Health, Kenya" and "iHRIS-Train - Pre-Service and In-Service Training Management". A navigation bar contains "Home", "Feedback", "iHRIS Website", and "Log out as Administrator". A sidebar on the left lists various management options. The main content area is titled "Search Records" and contains three search options: "Recent Changes" (View forms that have been updated recently), "Search People" (Locate any person's record in the system to review, print or update), and "Search Training Providers" (Locate any training Providers in the system to review, print or update).

### 5.1 Search People

Click **Search People**.



The screenshot shows the "Search Person" form. The title is "Search Person" and the subtitle is "Search all people in the system". Below the title is a section titled "Choose options to limit results" with a "Save as default view" checkbox. The form contains four input fields: "Gender" (a dropdown menu with "Select Value"), "First Name" (a text input field), "Nationality" (a dropdown menu with "Select Value"), and "Surname" (a text input field with "Wad" entered). A "Search" button is located at the bottom right. A callout box points to the Surname field with the text "Enter a few letters of the surname and click search".

Enter the person's **Surname** to find a single record or leave blank to find multiple records. For example limit the search to a particular gender by selecting that gender from the **Gender** menu. Leave blank to search all. Click the search button to show all matching results.

**Search Person**  
 Search all people in the system  
 Results limited by: Surname: Wad

Results found : 1

#	First Name	Surname	Gender	Job/Post Title	Health Facility	Registration Council	Nationality
1	<a href="#">Jsmail</a>	<a href="#">Wadembele</a>	Male				Uganda

Choose options to limit results  Save as default view

Gender:

First Name:

Nationality:

Surname:

Click on name to show the details

A list of matching records displays. Click the name of the person whose record you want to review. To search again, select new options from the Search form and click search.

## 5.2 Search Training Provider

Click Search Training providers.

**Search Training Provider**  
 Search all training Providers in the system  
 Results limited by: Training Provider Name: KMTTC

Results found : 3

#	Name	Training Provider Type	Training	Training Instance
1	<a href="#">Kenya Medical Training College (KMTCC) Nairobi</a>	Training Institution	Clinical Care of Sexual Violence (TOT)	Kenya Medical Training College (KMTCC) Nairobi - Clinical Care of Sexual Violence (TOT)
2	<a href="#">Kenya Medical Training College (KMTCC) Nakuru</a>	Training Institution	Cervical Cancer Screening	Kenya Medical Training College (KMTCC) Nakuru - Cervical Cancer Screening
3	<a href="#">Kenya Medical Training College (KMTCC) Garissa</a>	Training Institution	PMTCT	Kenya Medical Training College (KMTCC) Garissa - PMTCT

Choose options to limit results  Save as default view

Training Provider Name:

Training Provider Type:

Training Information:

Select one of the options provided at a time to limit the search by training provider name, type, or training information. If an option is not selected, all records will be searched. Click the search button to show all matching results.

**Search Training Provider**  
Search all training Providers in the system

**Results found : 18**

#	Name	Training Provider Type	Training	Training Instance
1	<a href="#">AMREF e-Learning</a>	Training Institution		
2	<a href="#">FUNZOKenya</a>	Sponsor	Adult ART	FUNZOKenya - Adult ART
3	<a href="#">JKUAT</a>	Training Institution		
4	<a href="#">Jomo Kenyatta University</a>	Training Institution	Applied Epidemiology	Jomo Kenyatta University - Applied Epidemiology
5	<a href="#">Kenya Medical Training College (KMTCC) Garissa</a>	Training Institution	PMTCT	Kenya Medical Training College (KMTCC) Garissa - PMTCT
6	<a href="#">Kenya Medical Training College (KMTCC) Nairobi</a>	Training Institution	Clinical Care of Sexual Violence (TOT)	Kenya Medical Training College (KMTCC) Nairobi - Clinical Care of Sexual Violence (TOT)
7	<a href="#">Kenya Medical Training College (KMTCC) Nakuru</a>	Training Institution	Cervical Cancer Screening	Kenya Medical Training College (KMTCC) Nakuru - Cervical Cancer Screening
8	<a href="#">Kenya Methodist University (KEMU) - Meru</a>	Training Institution		
9	<a href="#">Kijabe Hospital School of Nursing</a>	Training Institution	Multidrug Resistant TB	
10	<a href="#">Maseno University</a>	Training Institution		
11	<a href="#">Masinde Muliro University</a>	Training Institution		
12	<a href="#">Maua Methodist Hospital School of Nursing</a>	Training Institution	Focused Antenatal Care	
13	<a href="#">Mission for Essential Drugs &amp; Supplies (MEDS) - Commodity &amp;</a>	Training		

**Sorting by: Name (Increasing)**

When you click the training provider name, the institution displays, showing all information about the institution including location, contacts, ownership, the different trainings it offers, and when the training will take place.

Training Provider: [Pwani College](#)

Training Provider Type: Government

---

**Training Provider Information**

▼Hide | [Add Training](#)

✎ Edit This Information	Name	
<ul style="list-style-type: none"> <li>• <a href="#">Update this Information</a></li> </ul>	Name:	Pwani College
	Training Provider Type:	Government
	Code:	
	Ownership:	Government
	Intake Capacity:	300
	Telephone Number:	0722203447/8/9
	Alternate Telephone Number:	
	Mailing Address:	P.O Box 3345-00560
	Fax Number:	
	Email Address:	info@pwanicollege.or.ke
Primary Contact Person:	Michaela Kalume	

---

**Training Information: Cervical Cancer Screening**

▼Hide | [Scheduled a new Training](#) | [View All Trainings](#)

✎ Edit This Information	Scheduled Training Course	
<ul style="list-style-type: none"> <li>• <a href="#">Update this Information</a></li> <li>• <a href="#">View Scheduled Training Details</a></li> </ul>	Start Date:	28 October 2013
	End Date:	30 October 2013
	Source Of Funding:	USAID
	Target Group(s):	Clinical Officer
	Location Details:	Mombasa

From this screen, you can update any information by selecting update this information on each section.

## 6 Reports

The following pre-defined report views available once HRIS is installed.

- **Provider Trainings:** It is a list of Scheduled/On-Going Training Courses in the different institutions
- **Training Courses:** A List of all training courses
- **Search Person:** Search all people in the system
- **Search Training Provider:** Search all training Providers in the system

To access any report of interest, click **View Reports**. A list of reports will appear (see figure below).

Click the desired report (graphical and table format) e.g. **Provider Trainings**.

### 6.1 Tabular report formats

Provider Trainings

Results found : 10

#	Training Course	Training Provider Name	Scheduled Training Information Start Date	Scheduled Training Information End Date
1	Adult ART	FUNZOKenya	25 June 2013	28 June 2013
2	PMTCT	Kenya Medical Training College (KMTCC) Garissa	3 September 2013	6 September 2013
3	Adult ART	Pwani University College	9 July 2013	12 July 2013
4	Adult ART Management	Pwani University College	23 July 2013	26 July 2013
5	Cervical Cancer Screening	Kenya Medical Training College (KMTCC) Nakuru	5 August 2013	7 August 2013
6	Clinical Care of Sexual Violence (TOT)	Kenya Medical Training College (KMTCC) Nairobi	3 July 2013	5 July 2013
7	Focused Antenatal Care	Kenya Medical Training College (KMTCC) Nairobi	10 September 2013	13 September 2013
8	Applied Epidemiology	Jomo Kenyatta University	15 October 2013	15 October 2015
9	Comprehensive Prevention of Mother to Child Transmission of HIV/AIDS for Service Providers	Kenya Medical Training College (KMTCC) Nairobi	12 August 2013	16 August 2013
10	Diploman in Nursing	Kenya Medical Training College (KMTCC) Nairobi	4 November 2013	26 September 2015

Choose options to limit results  Save as default view

Training Courses

Results found : 15

#	Training Information Name	Training Information Training Type
1	Essential Newborn Care	In-Service Training (Short)
2	Cervical Cancer Prevention	In-Service Training (Short)
3	IMCI	In-Service Training (Short)
4	Multidrug Resistant TB	In-Service Training (Short)
5	PMTCT	Pre Service Training
6	Adult ART	In-Service Training (Short)
7	Clinical Care of Sexual Violence (TOT)	Pre Service Training
8	Commodity Management-EMMS	Pre Service Training
9	LAMP-FP	Pre Service Training
10	Cervical Cancer Screening	In-Service Training (Short)
11	Adult ART Management	Post Basic/In-service Training (Long)
12	Applied Epidemiology	Post Basic/In-service Training (Long)
13	Focused Antenatal Care	In-Service Training (Short)
14	Comprehensive Prevention of Mother to Child Transmission of HIV/AIDS for Service Providers	In-Service Training (Short)
15	Diploman in Nursing	Pre Service Training

Choose options to limit results  Save as default view

To create a pdf file of the above report, click the **Print** button. To export to spread sheet like excel, click the **Export** button

Scheduled/On-going Training Courses

A list of Scheduled/On-Going Training Courses

Results found : 6

#	Training	Train	Start Date	Training Course End Date	Participants (Sum)
1	Diploma in comprehensive nursing	Institute of Health Sciences Jinja	26 August 2011	27 June 2014	1
2	Bachelor of science in nursing	Munyonyo University	18 August 2012	19 June 2015	2
3	Post-Graduate Diploma in Medical Education	Munyonyo Health Tutor's College	24 August 2012	21 June 2013	3
4	Certificate in Comprehensive Nursing	Munyonyo Nursing Training School	16 August 2013	17 June 2016	0
5				June 2016	2
6				June 2016	0

Course End Date (Increasing)

Save as default view

**Export Options**

File Type

Compression Options

Click Export again

Click on export again and no compression.

A pop-up windows appears, select open with as shown in the screen below

**Scheduled/On-going Training Courses**  
 A list of Scheduled/On-Going Training Courses

Results found : 6

#	Training Course End Date	Participants (Sum)
1	7 June 2014	1
2	9 June 2015	2
3	11 June 2013	3
4	7 June 2016	0
5	June 2016	2
6	June 2016	0

Course End Date (Increasing)  
 Save as default view

Opening Scheduled\_On-going\_Training\_Courses\_29\_04\_2013.csv

You have chosen to open:

Scheduled\_On-going\_Training\_Courses\_29\_04\_2013.csv  
 which is a: Microsoft Excel Comma Separated Values File  
 from: http://192.168.0.238

What should Firefox do with this file?

Open with Microsoft Excel (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

Click the **OK** button, and the report will be opened in excel.

Note: This file opens or saves as \* .CSV. To change the file format, Go to **File** menu, select **Save As**, type file name, under **save as type** choose **Excel 97-2003 workbook** from the drop down menu

## 6.2 Graphical Report Formats

Follow the above steps as used to display the tabular report format, to get graphical report - clicking **Chart** button. Click the **Chart** Button to display summary information in chart format.

Note: This button is only applicable to reports with not more than two fields where one field is numeric.

**Scheduled/On-going Training Courses**  
A list of Scheduled/On-Going Training Courses

Results found : 6

#	Training	Training Institution	Training Start Date	Training Course End Date	Participants (Sum)
1	Diploma in comprehensive	Institute of health	26 June 2011	27 June 2014	1
2	Bach			2015	2
3	E			2013	3
4	Cert			2016	0
5				2016	2
6	Cert			2016	0

**Chart Options**

Chart Style Choose the chart style.  
Column Chart(Simple)

Displayed Fields Choose the way you wish to select fields to display.  
Two fields (Total)

**Total on Two Fields**  
Displays the total for two fields First Field  
Training  
Second Field Participants

Chart Close

Choose the desired chart format from **Chart Style** drop down menu, Choose the way you wish to select fields to display from the **Displayed Fields**.

*Note: Using the procedure above, will help to produce the necessary reports as desired by the user*

## 6.3 Report Views

Report views define how data are displayed in a report. Multiple report views can be created for the same report so that data may be aggregated and analyzed in various ways. For each report, data can be displayed either as a table or as a chart. The data may also be exported for further analysis, or the report may be printed.

### 6.3.1 Creating and Editing report views

Administrators and Managers can create new report views or edit views that have already been defined. At least one report view must be defined before a report can be run. Other users may run any report view, but they cannot create new views. Creating report views requires some knowledge of the data fields used in HRIS.

*Note: Unless you understand these fields, you should not edit or delete the existing report views pre-defined in HRIS.*

To create report views, click **Configure System** under "Manage Reports" click **Report Views**.

**Staff Reports**

- Age Distribution — Total of all staff by age range.  
[Edit](#), [Archive Report](#)
- Classification Breakdown — A total of all staff by classification.  
[Edit](#), [Archive Report](#)
- Hires per Year — Hire totals by year.  
[Edit](#), [Archive Report](#)
- Job Breakdown — Total staff by job.  
[Edit](#), [Archive Report](#)
- Nationality Breakdown — A list of all staff by nationality.  
[Edit](#), [Archive Report](#)
- Retirement Planning — Staff totals by retirement year.  
[Edit](#), [Archive Report](#)
- Retirement Exit Report — Shows the Exit/ retirement situation.  
[Edit](#), [Archive Report](#)
- Emergency Contact List — List of all staff with emergency contact details.  
[Edit](#), [Archive Report](#)
- Home Contact List — All staff with home contact details.  
[Edit](#), [Archive Report](#)
- Salary List — A list of all employees with salary details.  
[Edit](#), [Archive Report](#)
- Staff Directory — A list of all current staff with work contact information.  
[Edit](#), [Archive Report](#)

Create a new view for a report:

Name of View:

Report:

Description:

Type the name of the report view, select the affiliated report, type a short description of the report view & click update

The pop up screen displaying the message ‘successfully updated values’ click **Close**

**Reports By Category**

- Facility Report**
  - Facility List — A list of all facilities.  
[Edit](#), [Archive Report](#)
- Training Reports**
  - Mentored Staff — A list of mentored Staff.  
[Edit](#), [Archive Report](#)
  - One Day Trainings — Staff with one day trainings.  
[Edit](#), [Archive Report](#)
  - Trained Staff (Latest Trainings) — A List of staff with their Latest Trainings.  
[Edit](#), [Archive Report](#)
  - Trained staff (All Trainings) — A list of trained staff (including duplicates).  
[Edit](#), [Archive Report](#)
  - Total Staff Trained (All Trainings) — Total staff trained by...  
[Edit](#), [Archive Report](#)
- Position Reports**
  - Position List — A list of all positions.  
[Edit](#), [Archive Report](#)
  - Position Open Duration — The length in days each positio...  
[Edit](#), [Archive Report](#)
- Other Staff Reports**
  - Registration and Licensure status — The Status of current staff's registration and license

Information:

Successfully Updated Values

This is a pop up screen

**Note: The following steps also apply to editing an existing report view**

Locate the newly created or existing report view and click on **edit** in order to activate or edit the fields to be seen in the view respectively.

Click in the check box to enable the field

To change order of display of the fields on the report, point on the field name hold and drag to a desired order.

After selecting all the desired fields and arrangement, click **Update**. The pop up screen displaying the message 'successfully updated values' click **Close**

## 7 Administer Database

To ensure that standard data types such as countries, regions, districts, training types, training courses, institution ownership, and the like are enforced across the system, those standard data types must be created as lists. These lists are used to create selection menus that provide options for selection when adding section of records.

Click **Configure System** and then click **Administer Database** to create and update standard lists of data for selection in system menus (see figure below).



Administer database is composed of several sections i.e. Trainings, Jobs/Post, and Other Lists as shown above

### 7.1 Add Academic Level

The *academic level* classifies a type of educational institution that issues degrees/certification. Academic levels are selected when entering a person's educational history.

Click **Configure System** then click **Administer Database** , Click on **3. Other Lists** then **Academic Level**. The academic/education Type/Level page opens, showing all academic levels entered in the database.

Manage Trainings	<a href="#">Administer Database: Academic Level</a>
Manage People	<a href="#">Add new Academic Level</a>
Search Records	
View Reports	<b>Select Academic Level to edit</b>
Configure System	<a href="#">Graduate</a>
Change Password	<a href="#">Post-Graduate</a>
	<input type="button" value="return"/>

Either Click **Add new Academic level** or select an academic level and click **Update This Information** to edit it.

## 7.2 Add a Country

You will need to add at least one country to the system for selection whenever a geographical location is required. This should be the country where your organization's headquarters are located. In addition, you should add the names of all countries where trainees are located or all nationalities you would like to track in the system.

Navigate to **Configure System->Administer Database->3. Other Lists Tab**. Click on **Country** under the **Geographic Information** Section.

The Country page opens, showing all Countries entered in the database. Either Click **Add New Country** or select an existing Country and click **Update This Information** to edit it.

Manage People	<a href="#">Administer Database: Country</a>
Search Records	<b>Country</b>
View Reports	Name*
Configure System	<input type="text"/>
* Administer Database	2 Character Alpha Code*
* Configure Modules	<input type="text"/>
* Form Relationships	ISO Numeric Code
* Reports	<input type="text"/>
* Report Views	Primary Country
* Browse Magic Data	No
* Background Processes	Use for Location Selection
* Cached Forms	No
* Administer Users	Hide
Change Password	No
	<input type="button" value="return (do not save changes)"/> <input type="button" value="Confirm"/>

The same reasoning and steps are used to add region, district, sub-county, and currency

### 7.3 Add Training Course

Navigate to the **Configure System->Administer Database->1. Trainings Tab ->Training Courses**. The Training Course page opens, showing all Training courses entered in the database.

[Administer Database: Training Courses](#)

Select Training Type:

Select the Training Type to limit the displayed values of Training Information.

Select One

[Add new Training Courses](#)

Select Training Information to edit

- [Adult ART](#)
- [Adult ART Management](#)
- [Applied Epidemiology](#)
- [Cervical Cancer Prevention](#)
- [Cervical Cancer Screening](#)
- [Clinical Care of Sexual Violence \(TOT\)](#)

Either click **Add New Training Courses** or select an existing training course and click Update This Information to edit it.

Add/Update Training Courses

Training Information

Accreditation Code/Number\*

CPD Credit Hours

Name\*

Summary

Training Classification\*

Duration of Training\*

Unit\*

Training Type

Hide

Add the training course, Click confirm, and click save

## 7.1 Add Training Classification/Cadres

A *cadre* is a broad category of workers characterized by the specific training, certification or other qualifications required to practice or be licensed in that field. Examples of cadres include Nurse, Physician and Pharmacist. Each job can be linked to one cadre for reporting purposes. You may add new cadres or edit any cadre that was previously added.

Navigate to **Configure System->Administer Database->2. Jobs/Post Tab>Cadres**



[Administer Database: Cadres](#)

[Add new Cadres](#)

**Select Cadres to edit**

- [Clinical Officers](#)
- [Doctors](#)
- [HRIOs](#)
- [Lab Technicians](#)
- [Nurses](#)
- [Nutritionists](#)

The Cadres page opens, showing all Cadres entered in the database. Either Click **Add new Cadre** or select a Cadre and click **Update This Information** to edit it.



**Add/Update Cadres**

**Cadre**

Name\*  Hide

Click Save to confirm and save the new record.