

## Overview

The Human Resource (HR) screens in *isolved* serve as a tracking mechanism that help to manage employees effectively. This HR data can include information about education and is accessible to employees, managers, and HR administrators via self-service. Easy access to this data enables managers to make informed decisions regarding job changes, promotions, and performance evaluations.

To get started, enter the HR data that is most important to your business under **Client Management > HR Management**. All the HR screens have corresponding reports, and the data is also available in the report writer, allowing for custom reporting.

## Education Description

Examples of education may include a high school diploma, bachelor's degree, master's degree, and PhD. Depending on your business type, you may also want to record vocational education or apprenticeship programs. Tracking an employee's educational background is crucial for determining their qualifications for assigned job duties. Once added, this information becomes available in a drop-down menu for each employee, and you can update the list at any time.

To list the types of education you may wish to track, follow these steps:

1. Navigate to **Client Management > HR Management > Training and Development > Education**.
2. Click **Add New**.
3. Enter the **Description** (i.e., "High School," "College").
4. Click **Save**.

## Recording Employee Education

Once you have created your list of educational background types, you can begin recording employee education information into their educational records. To do so, follow these steps:

1. Navigate to **Employee Management > Human Resources > Training and Development > Education**.
2. Click **Add New**.
3. Add a **School** (required)
4. Select the **Graduated** checkbox, if applicable.
5. Add a **Degree** (optional).
6. Add **Major** (optional).
7. Add a **Minor** (optional).
8. Enter a **Completion date** (optional).
9. Add **GPA** and **Honors** information (optional).
10. Add additional **Comments** (optional). For example, here is where you can add a comment indicating if an employee has taken courses, but has not completed an entire program.
11. Click **Save**.

Once added, a historical record of all educational experiences for the selected employee is maintained at the top of the screen.

## Reports

Access **Reporting > Client Reports**, select the “HR” category, or filter by the report name or description.

- “Employee Education History Report (Date Range)”

## Report Writer

All the data stored for the HR topics is available in Report Writer, allowing you to create a custom report. The report can pull multiple entries for an employee to reflect all the employee's records.

1. Click **Add New**.
2. Select “HR Report” for the **Report Type**.
3. Select “Education” for the **Sub Report Type**.
4. Add a **Report Title**.
5. Select the **Font Size** and **Font Face** (optional).
6. The **Report Orientation** defaults to “Landscape” but can be changed to “Portrait” (optional).  
Note: You may change any of these fields now or return to these choices after printing the report.
7. Select a **Report Group**.
8. Enter a **Description** (optional).
9. Click **Save**.

Once you have saved the report, additional tabs become available for you to create the report.

For additional information on Report Writer functionality, view the article [Report Writer User's Guide](#).