



TrainingRegister® Tutorial

ClassCatalog Table

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Abstract: This Tutorial will help the user open the ClassCatalog Table and add a new record.

It will be assumed the user has worked through the Overview Tutorial, knows how to open TrainingRegister®, switch to the sample database if needed and login.

It will also be assumed the user is already logged into TrainingRegister®.

Opening the ClassCatalog Table:

Click the [Tables] Menu, then select [ClassCatalog]

The ClassCatalog Table is used to save permanent information about all learning experiences, classes, ISO Documents, etc. It is the only table in the database where the class title, hours and description are saved.

IMPORTANT NOTE: A learning experience should be entered in the ClassCatalog table only once. It can be scheduled hundreds of times. The ClassCatalog record is part of the permanent training records and should not be deleted unless it was entered by mistake.

First, determine if the class has been previously entered:

Click the [Find] button, enter a keyword to search existing ClassCatalog records.

Example: If adding a new record for “safety” training of some kind, search the existing records for any title that contains the keyword “safety”. Determine if the class has already been entered. If it has been entered, don’t add it again.

Add a New Record to the ClassCatalog Table:

Note: Sometimes users are confused with the function of the [New] and [Edit] buttons. Occasionally, someone will click [Edit] to add a new record and then simply overwrite good data with their own new data. When in doubt, hold the mouse pointer over each button to expose a tool tip that explains the purpose of the button.

Make sure the training has not already been entered in TrainingRegister® before proceeding! See the notes above.

Click the [New] button to add a new learning experience / training to the ClassCatalog Table.

Enter a unique ID that can be used to identify the new class. This can be any alphanumeric value up to 15 characters in length. This will be known as the “ClassID”.

Note: TrainingRegister® will search the ClassCatalog Table to determine if the ClassID entered has already been used. If it is unique, it will be accepted. If it has been used, a message will be displayed.

Enter a title and class hours for the new training.

Enter any other data desired. See the notes below for field descriptions and usage.

Note: The fields that are marked with an asterisks, will be saved with training records that link people to the training. Those training records can be extracted for reporting based on these values, if the values were entered prior to the creation of the training records. If they are changed, they will affect training records created in the future.

Click the [Save] button to save the data to the database.

Notes:

The CEU field should be used if tracking of continuing education units or professional units is needed and they differ from the actual class hours. If CEU are entered then this value will be saved with training records that link people to this class. In other words, they earn CEU if CEU are entered. It is also possible to edit the training records of individuals and add or subtract CEU as needed. This accommodates for two people taking the same training but earning different CEU or hours.

The Days field is informative text only and will display on class scheduling information such as a confirmation letter.

The Revision field is for training that has revisions such as ISO documents. If the new revision replaces a required training then TrainingRegister® has a feature (described elsewhere) to create a new record for the new revision. Permanent training records for the old revision are preserved but it is no longer required. The new revision becomes the requirement. Consulting with TrainingRegister® Support is recommended to fully understand this feature.

The DeliveryMethod classification will replicate to the training records when they are created. This could be used to filter custom reports.

The ClassGrouping classification is used to classify scheduled instances of the training. Employees can filter/sort scheduled training by the ClassGrouping when they use the web-based schedule. The scope for some reports can be limited to specific ClassGroupings.

The SubjectCategory is intended to classify classes with a similar subject. For instance a class titled “Employee Safety” could have the same subject classification as a class titled “Customer Safety”. The training records could then be searched for all people with any knowledge in “safety”. Training records for both classes could be used to produce a list of people with the desired knowledge. The content for the two classes would be different but the subject would be the same.

The ProviderID is used to link the class to a training provider saved in the Companies Table. The ProviderID is replicated to the training records when they are created. This could be used to customize reports.

The Cost field can be used to record training costs if the class will not be scheduled in the ClassSchedule Table. If people are linked directly to the ClassCatalog record then this cost will be recorded in their training record. If the class is scheduled and people are enrolled this field will be ignored and a different process is used to record training costs.

The Description is used to display an abstract for the training on the web-based schedule. Employees can see what the class is about before enrolling.

The InstructorID is used to classify training records that are created by directly linking people to the class record. It is not used if the class is scheduled. If the class is scheduled then instructors can be scheduled also.

The AdministratorID is used if employees use the web module to make enrollment requests rather than to self-enroll. The requests are sent to a default training administrator unless one is defined for the class before it is scheduled. This permits different training staff to “own” different classes and receive the requests for those classes.

The Confirmation Header and Footer are used to customize confirmation letters. If blank, the default headers and footers are used. Confirmation letters are used if people are enrolled using the administration module. Confirmation letters are not needed if employees are permitted to self-enroll using the web module.