



TrainingRegister® Tutorial

Drop an Individual

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Abstract: This Tutorial will help the user use the ClassSchedule Form or the People Form to drop an individual from a scheduled class.

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®.

Note: Enrolled students that do not attend should be dropped **BEFORE** the enrollment records are batch converted to “Completed” training records. If this step is skipped, inappropriate training records can be deleted on an individual basis using the edit training records button on the [Tasks] Tab of the student’s People Form.

Note: The companion Web Module can be configured to permit employees to self-drop or send a drop request. If a drop request is used then someone will use one of these two methods to actually drop the person. In addition, a supervisor could receive the request and use the Web Module to drop the person. If the employee is permitted to self drop with the Web Module, neither of the methods described in this tutorial are needed.

Available Methods of Dropping Individuals:

- Administration Module – Locate scheduled class in ClassSchedule Table and use button on [Tasks] tab to select and drop a student
- Administration Module – Locate student in People Table and use button on [Tasks] tab to select a scheduled class
- Web Module – Employees can be permitted to self-drop or send a drop request
- Web Module – Supervisors can be permitted to drop their staff
- Web Module – Administrators can drop anyone

Method 1: – Locate scheduled class in ClassSchedule Table and use button on [Tasks] tab to select and drop a student

Select an existing ClassSchedule record:

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

Click [Find] and use the search tools provided to select an existing scheduled class.

On the [Tasks] Tab, click the [Remove / Drop Student] Button.

Select the student from the drop-down list box.

Select a Reason for dropping from the next drop-down list box.

A message will indicate success or failure.

Method 2: – Locate student in People Table and use button on [Tasks] tab to select a scheduled class

Select a student in the People Table:

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

Click [Find] and use the search tools provided to select a student in the People Table

On the [Tasks] Tab, click the [Remove/Drop from Scheduled Training] Button.

Select the Scheduled Class from the drop-down list box.

Select a Reason for dropping from the next drop-down list box.

A message will indicate success or failure.

Reports: Just like the Waitlist, Missed Training is linked or associated with the ClassCatalog record rather than the ClassSchedule record.

Missed Training reports with Reasons for dropping are available on the [Reports] Tabs for both the ClassCatalog record and the individual student's People record. The individual's training record will be classified as "Dropped" but will not show the reason.

Reasons: Reasons for dropping are user defined and used to fill the drop-down list box with choices. To add choices, see [Tables], [List box Related Tables], [ClassSchedule Related List Boxes], [Reasons].