TrainingRegister® Tutorial

Enroll a Group

Revised: 04/14/2005

Abstract: This Tutorial will help the user use the ClassSchedule Form to enroll a group of individuals with or in 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: Scheduling is not a requirement to record training. Historical training can be recorded without using the schedule and enroll process described in this tutorial.

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 [Schedule / Enroll Students] Button. Will be renamed [Schedule / Enroll a Group] in version 7.1.28.

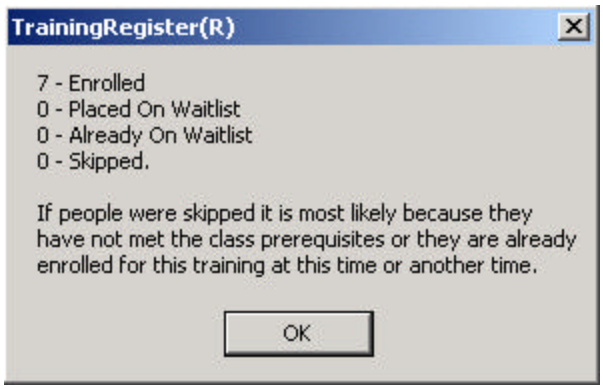
Use the search tool provided to select a Group.

If the default choices are selected, enrollment will be handled automatically. People will be skipped if they are already enrolled, taken off a waitlist if a seat is available, skipped if they are terminated and marked inactive, skipped if they have not met the any class prerequisite, etc.

One choice permits skipping people if they have had the training within a certain number of months or if they have ever had the training.

Another choice lets you select how to deal with people who have not met the prerequisites for the class as shown below.

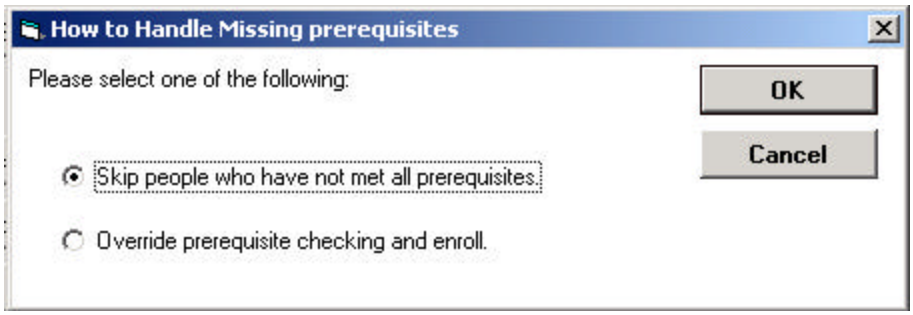
When the process is complete, a Results Message will display as shown.



Scheduling Conflicts:
Conflicts are identified so they may be easily located after the process has completed.

Prepare an Enrollment Roster and check for conflicts. To learn what is causing the conflict, prepare a [Training Schedule] for the individual on the [Reports] Tab of the People Form. The two entries causing the conflict will be marked. Fixing one will cause the mark to be removed from both.

Prerequisites are handled as follows:



The prerequisite question is one of the several choices presented before the group is actually enrolled.

Confirmation Letters:

Individual Confirmation Letters are not automatically created when a Group is enrolled. Use the TrainingRegister® Messaging Feature to send the entire group a custom confirmation letter and/or any needed details about the class.

Reports:

On [Reports] Tab of the student's People record, select [Training Schedule]

On [Reports] Tab of the student's People record, select [Training Records]

On [Reports] Tab of the student's People record, select [Duplicate Confirmation Letter]

On the [Reports] Tab of the ClassSchedule record, select [Enrollment Roster]

On the ClassSchedule Form the enrollment count will be increased by the number of successful enrollments.

On the ClassCatalog Form then number people waiting for the class will be displayed in the lower right corner.

Note: One of the Groups that could have been selected for enrollment was the Waitlist.