



TrainingRegister® Tutorial

Enroll an Individual

Revised: 04/14/2005

Abstract: This Tutorial will help the user use the ClassSchedule Form or the People Form to enroll an individual 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.

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

Available Methods of Enrolling Individuals:

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

Methods of enrolling a group of individuals will be covered in another tutorial.

The first two methods will be discussed in this Tutorial. The only difference between these first two methods is how the enrollment is started.

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

Select an existing ClassSchedule record:

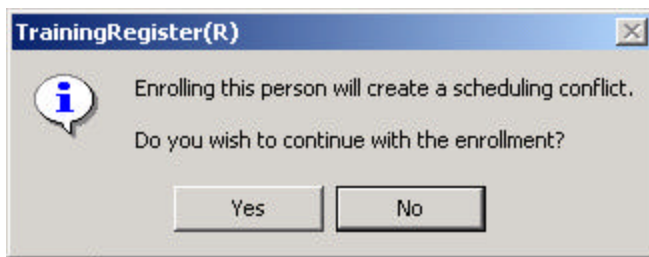
Click the [Tables] Menu, then select [ClassSchedule]

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

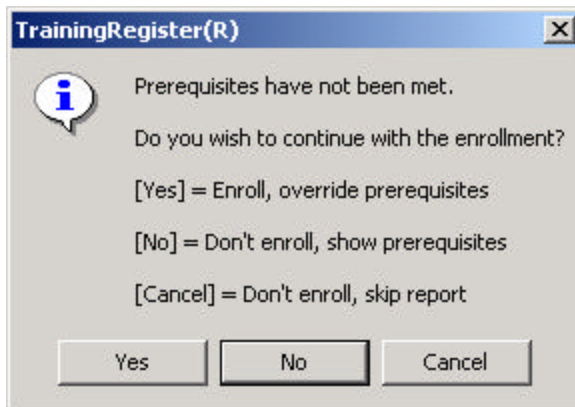
On the [Tasks] Tab, click the [Schedule Single Student] Button.

Use the search tool provided to select an individual from the People Table.

Scheduling Conflicts are handled as follows:



Prerequisites are handled as follows:



If the enrollment is not successful, a message will display describing the reason. The class could be full in which case the student can be placed on a waitlist. The person could already be enrolled. The enrollment might create a scheduling conflict if the person is scheduled to attend or instruct for the same time period. See the Waitlist Tutorial for details about the waitlist.

A message will indicate enrollment success and offer to display a Confirmation Letter.

The Confirmation Letter can be printed and delivered or emailed using the browser's mail page feature.

The TrainingRegister® Messaging Feature can be used to send a generic confirmation letter (or other class information) to all enrollees at the same time.

A duplicate confirmation letter can be prepared from the [Reports] Tab of the student in the People table.

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

On the ClassSchedule Form the enrollment count will be increased by 1.

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:

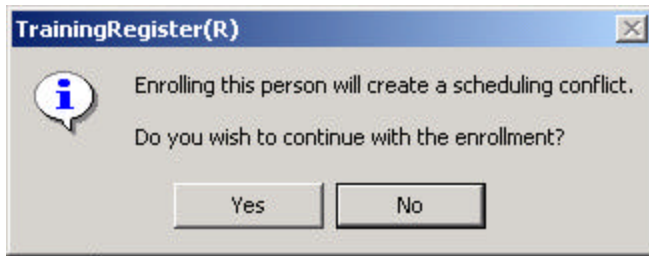
Click the [Tables] Menu, then select [People]

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

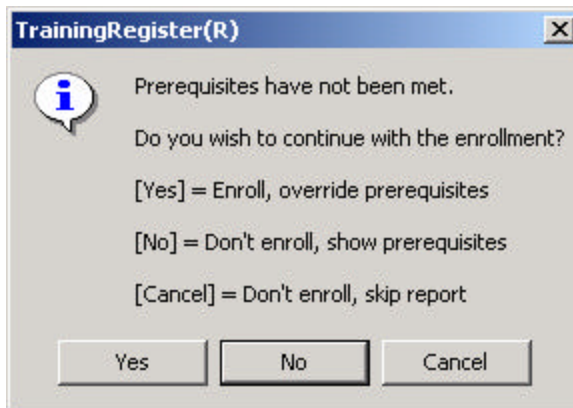
On the [Tasks] Tab, click the [Schedule/Enroll for Scheduled Training] Button.

Use the search tool provided to select a scheduled class

Scheduling Conflicts are handled as follows:



Prerequisites are handled as follows:



If the enrollment is not successful, a message will display describing the reason. The class could be full in which case the student can be placed on a waitlist. The person could already be enrolled. The enrollment might create a scheduling conflict if the person is scheduled to attend or instruct for the same time period. See the Waitlist Tutorial for details about the waitlist.

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

On the ClassSchedule Form the enrollment count will be increased by 1.