



TrainingRegister® Tutorial

Join Scheduled Classes

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Abstract: This Tutorial will help the user join two or more scheduled classes that might have low enrollment into a single scheduled class. The ability to perform this task is or will be available with Version 7.1.28.

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®.

Perform a Group Enrollment by Selecting the Enrollment Roster for another Scheduled Class:

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

Click [Find] and use the search tools provided to select an existing scheduled class that should be saved. This will be known as the “Current Scheduled Class”.

Note: A roster from another scheduled class will be added to the roster for the current scheduled class. Duplicate enrollment records will be created. The other class will then be cancelled and deleted which will remove the duplicate records.

Make sure enough seats are available to permit enrolling all the people from the second/other scheduled class.

Note the enrollment count before performing the group enrollment.

On the [Tasks] Tab, click the [Schedule / Enroll a Group] Button.

Select the [Schedule People Who are Enrolled in Another Scheduled Class] choice as a group to enroll.

Use the search tool provided to select the second or other scheduled class. This second class will eventually be deleted.

Read the messages as they are presented to confirm an understanding of what is happening.

Confirm that the enrollment count increased by the number of people enrolled in the second/other class.

If there is a problem, print an enrollment roster for both classes and fix the problem on an individual basis after deleting the second/other class. **DO NOT REPEAT THE GROUP ENROLLMENT OR JOIN.** Normally TrainingRegister® will not permit enrolling a person in a scheduled class if that person is enrolled in any other instance of the same class. They are simply skipped. When the join described in this tutorial is performed, this protection is overridden and TrainingRegister® will permit creating duplicate enrollment records. Repeating the process a second time will create a mess that can be cleaned up but it will not be a pleasant experience.

Any cleanup or repair must be performed by editing or deleting individual training records for each person. **Do this after deleting the second/other scheduled class.** This deletion will likely clean up most of what looks like a problem. A button to edit training records can be found on the [Tasks] Tab of the People Form.

Delete the Second/Other Scheduled Class:

Click [Find] and use the search tools provided to select the second/other class that was used as the source for the group enrollment.

On the [Tasks] Tab, click the [Cancel / Kill this Scheduled Class] button

Click the [Delete] button to remove the ClassSchedule record.

Check for Scheduling Conflicts:

Return to the original record for the scheduled class that is to be saved.

On the [Reports] Tab click [Enrollment Roster] to prepare the report.

Examine for scheduling conflicts that might have been created by enrolling the students at a new date or time.

If conflicts are displayed, examine the individual's training schedule to determine the cause.