



TrainingRegister® Tutorial

Attach Files to a Person's People Record

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Abstract: This Tutorial will help the user attach files to a person's People record. Any type file can be attached making it possible to save things like an individual's training plan, evaluation or succession plan.

These attached files can later be retrieved or replaced with an updated version.

Photos should be attached using a separate function so the photos can be displayed correctly.

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 People Table:

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

Click [Find] and use the search tools provided to locate an individual's record in the People table.

On the [Tasks] Tab, click the [Attach File to this Person's Record] Button.

Use the Windows tools to locate the file to be attached.

The file will be renamed with a prefix of the person's ID and saved in the designated PeopleFiles shared LAN/WAN folder.

The source folder is remembered making it easy to select additional files from the same location.

Retrieve and Use and Attached File

Locate the person's record in the People table.

On the [Reports] tab select [Retrieve Copy of Attached File]

Use Windows provided tools to select the appropriate file and then designate a destination and file name for the copy.

Replace or Update an Attached File.

Attaching a new file with the same name will replace the existing file.

The file and also be edited or deleted in the designated PeopleFiles folder.

Attached files are not saved in the database. They are saved in a shared LAN/WAN folder and are found with a prefix of the person's ID.