



# TrainingRegister® Tutorial

## Build a Training Program

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**Abstract:** This Tutorial will help the user link or associate classes with a training program. This is one of the three required steps summarized in the Required Training Overview Tutorial.

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®.

### **Prerequisite :**

It will be assumed the user has reviewed the **Required Training Overview Tutorial** that explained what Training Programs are for and how required training is tracked.

This step assumes a Training Program has already been entered in the Programs Table.

### **Opening the ClassCatalog Table:**

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

Click [Find] and use the search tools provided to locate a ClassCatalog record that will be required as part of a training program.

On the [Tasks] Tab, click the [Link to Training Program] Button.

Click the [New] button to add a new record that will link the class to a training program.

### **ProgramID:**

Use the drop-down list box to select a training program name. The ProgramID will automatically be inserted.

**Interval:**

If the training is required once in a lifetime, enter zero or leave blank.

If the training is required periodically, enter the periodic interval in months.

Do not use both target dates and periodic intervals. TrainingRegister® is not programmed to handle this combination.

**TargetDate:**

Target dates are usually confusing. Avoid target dates unless they are really needed. Don't mix target dates and periodic intervals.

If a target date is entered, all people who will be required to receive this training will be required to complete the training by the target date entered. This target date overrides any target date entered at the individual level.

Click [Save] to save the record.

If any people are linked to the training program selected, their program requirements will be automatically updated and cleaned. The user will be kept apprised of this action with a progress window. Each person's program requirements are maintained automatically in a behind the scenes table. Any change made to the program definition or to the person's training history will cause an automatic update to the person's program requirements.

If many changes are to be made, it might be quicker to turn off the automatic updating, make all the changes and then manually elect to update and clean the program requirements table. Be sure to turn automatic updating back on and then manually update and clean so related reports will be accurate.

**Reports:**

On the [Reports] Tab for the ClassCatalog Record, select [Linked Training Programs].

On the [Reports] Menu select [Required Training/Needed Related Reports], [All Required Classes Grouped by Training Program] – this report is the best overview of the training programs that have been defined.

All of the required/needed type reports will be applicable if all three steps have been completed. The training program must also be linked or associated with individuals.