TrainingRegister® Tutorial

Link Individuals to a Training Program

Revised: 04/26/2005

Abstract: This Tutorial will help the user link or associate individuals 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 People Table:
Click the [Tables] Menu, then select [People]

Click [Find] and use the search tools provided to locate a person who should be required to receive the training included in 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 person to a training program.

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

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, the person will be required to receive all training included in the selected training program by the target date entered.

If a target date has been entered for any class that is part of the selected training program, that target date will override any target date entered at the individual level for that class. Target dates can also be entered when the class is linked to the training program.

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

Click [Save] to save the record.

If any classes are linked to the training program selected, the program requirements for the selected individual 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.

Reports:
On the [Reports] Tab for the People Record, select [Training Program Requirements with Detail]. Assuming one or more classes are also linked to the selected training program, this will be the best report to show an individual's requirements and progress.

On the [Reports] Menu, select [Required Training/Needed Related Reports], [People Linked to a Selected Program].

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 one oir more classes in the ClassCatalog table.