TrainingRegister® Tutorial

Record Historical Training For a Group

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Abstract: This Tutorial will help the user add/create historical training records for a Group of people. This method can be used to avoid using the Schedule and Enroll Method for training that has already been completed. Use this method for any training that needs recorded but does not need to be scheduled. This method will be useful if almost all people in a Group have received the same training.

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®.

Confirm the Group to be used:
This procedure is time consuming to undo. Use great caution, for instance, to select the correct department before linking everyone in a department to a class.

Using the List of People report or the People Form, pre-select the People to be included in the selected group. Confirm the people in this group should be linked to the class/training.

If a complex search is needed, use a SQL Query to select and retrieve the desired records to the People Form. Tag only the retrieved records. Print a list of tagged people to confirm before proceeding. Use Tagged People as the group.

Opening the ClassCatalog Table:
Click the [Tables] Menu, then select [ClassCatalog]

Locate the Class/Training that will be recorded:
Click [Find] and then use one of the search methods to locate and display the correct "Current Class" on the ClassCatalog Form.

Discussion about this method:
This method is for adding a group of people directly to a class. This assumes all the participants have something in common that can be used to identify and select them as a group. For instance all people in a department could be added to the class for a specific completion date. This could be a time saver if almost all of them really did complete the training. The records of the few that did not complete the training can be deleted individually. If many people in the group did not complete the training it might be more efficient to use another method.

Select the [Tasks] Tab on the ClassCatalog Form

Click the [Add This Class Directly to One or More People] Button

Select the correct group of people using the tools provided

Enter a Completion Date when prompted

Press ENTER or click [OK] to complete the process

A report will be displayed that documents the results. The report cannot be recreated. Print it if a copy is needed.