

TrainingRegisterÒ



A Training Management System

User's Guide

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Table of Contents

User Basics.....	6
Starting TrainingRegister®	6
Login.....	6
Opening a Training Database	6
Reminders	6
TrainingRegister® Updates	6
Tables Menu	6
Reports Menu.....	6
Messaging Menu.....	6
Tools Menu.....	7
Window Menu	7
Time Saving Shortcut Keys	7
Quitting TrainingRegister®.....	7
Getting Help/Training.....	7
Novice, Advanced & Expert User Levels.....	7
Navigating/Editing Training Records	8
People Table.....	9
Entering a New Person	9
Schedule/Enroll an Individual for Training.....	9
Remove/Drop from Scheduled Training	9
Linking a Person to a Training Program.....	10
Linking a Person to a Skill.....	10
Edit Training Records	10
Deleting a Person.....	10
Deleting a Duplicate Person	10
Companies Table.....	11
Entering a New Record.....	11
ClassCatalog Table	11
Adding a New Training Class.....	11
Deciding Between Editing or Adding a New Class.....	11
Entering ISO Documents and Revisions	12
Combining Related Records in the ClassCatalog Table	12
Designating Qualified Instructor(s)	12
Linking a Class to a Training Program.....	12
Linking a Prerequisite to a Class	13
Adding a Class Directly to One or More People	13
Special Security for a ClassCatalog Record	13
Deleting a Class	13
ClassSchedule Table	14
Scheduling Process Overview	14

Scheduling a Class	14
Scheduling an Instructor	14
Removing an Instructor	15
Scheduling a Room.....	15
Removing a Room.....	15
Scheduling a Resource.....	15
Removing a Resource	15
Enrolling a Student	15
Enrolling a Batch of Students	15
Enrolling a Batch of Students Based on Training Requirements	16
Prerequisite Checking When Enrolling Students	16
Dropping a Student	16
Record a Cost for a Scheduled Class	16
Grade or Score Students	17
Post Enrollment Records to History.....	17
Cancel or Kill a Scheduled Class.....	17
Prepare an Enrollment Roster / Sign-in Sheet	17
Waitlist Function.....	17
How a Person Gets on a Waitlist	18
Removal from a Waitlist.....	18
Waitlist Report.....	18
Enrollment from Waitlist – TrainingRegister® Decides.....	18
Enrollment from Waitlist – Training Administrator Decides	18
Waitlist Confirmation Letter.....	18
Tracking Training Costs.....	19
Posting Enrollment Records	19
Grading	19
Posting	20
Training Programs	21
Tracking Required Training Based on Program Requirements.....	21
Creating a Training Program Name.....	21
Linking a Class to a Program.....	21
Linking a Person to a Program	22
Linking a Program to a Group	22
Removing a Program from a Group	22
Behind the Scenes	22
TargetDate	23
CompletionDate	23
Interval.....	23
NextDue	23
Messaging	23
Testing the Messaging Feature	24
Sending a Message to Test Recipient	24
Selecting Multiple Recipients	25

List Box Tables	25
Date/Time Entry and Formatting	25
Overview	25
Supervisor Record Filtering	26
Web Module	26
Supervisor Filtering	27
Reporting.....	27
Locating Reports.....	27
Closing Reports	27
Safety of Data with Reports.....	27
Customizing TrainingRegister® Reports	27
Printing or Emailing Reports	28
Copying Data to Excel.....	28
Using an External Report Writer	28
Description of Report Categories	28
Selecting and Tagging Records.....	29
Tagging - Overview/Purpose	29
Tagging for Single Records	30
Tagging for Multiple Records	30
Other Options.....	30
Data Export	30
Export a Table to a Comma-Delimited File	30
Export a Table to an Access File	31
Export All Tables to an Access File	31
Useful Reports Used for Data Export.....	31
SQL Searching.....	31
Using SQL to Select Records	31
Entering SQL Search Criteria	32
SQL Searching Text and Memo Fields	32
SQL Searching Date Fields	33
SQL Searching Numerical Fields	34
SQL Searching Logical (yes/no) Fields (Boolean type fields)	34
Global Option Settings.....	34
General.....	34
Date/Time Formatting	35
Confirmation Letter	35
Waitlist Notification Letter	36
Individual Schedule	36
Required Fields	37
Field Screen Names	37
Program Requirements	38
Web Module	38
Import Utility Rules.....	38

Software Registration Information	38
TrainingRegister® Change Tracking Option.....	39
Data Security for Companies Regulated by FDA CFR Title 21, Part 11	39
Change Tracking Exceptions	39
Security Settings	40
General.....	40
Automatic Login with Network Login Name	40
Security Tab Descriptions	40
Appendix A - Definitions	43
Appendix B - Tab and Field Descriptions For Tables	46
People Table Tabs and Field Descriptions	46
Companies Table Tabs and Field Descriptions	49
ClassCatalog Tabs and Field Descriptions	50
ClassSchedule Tabs and Field Descriptions	52
Appendix C - Reports	54
People Related Reports	54
ClassCatalog Related Reports.....	55
ClassSchedule Related Reports	56
Required / Needed Training Related Reports	57
Skill Tracking Reports	59
List Boxes – Contents of.....	59
Training Records – Other	60
Security Reports.....	60
Appendix D – List Boxes.....	61
People Related List Boxes	61
Company Related List Boxes	62
ClassCatalog Related List Boxes	62
ClassSchedule Related List Boxes.....	63
Required Training Related List boxes	63
Skill Tracking Related List Boxes	64
Accounting Related List Boxes	64

User Basics

Starting TrainingRegister®

Select the shortcut on your desktop or go to the Windows Start Menu, select Programs, then click on TrainingRegister®. The icon is a vertical stack of books.

Login

Select [User Login] on the [File] menu or open a table from the [Tables] menu and you will be prompted for your login information. Automatic login is also available (see section “Security Settings”). To open the Sample database or a new empty database, enter "1234" and "TEMP" for user ID and password. Otherwise enter the user ID and password assigned to you for use with TrainingRegister®. These values are not case sensitive.

Opening a Training Database

The database is automatically opened when TrainingRegister® is started. The data cannot be accessed until the user logs in.

Reminders

When logging into TrainingRegister® a prompt with the option to check reminders is displayed. If you choose [Yes], this feature will check for unposted scheduled classes and display the number of scheduled classes with enrollment records that need posting.

TrainingRegister® Updates

Updates can be accessed from the [File] menu. Users will be directed to a web site that will provide information regarding any changes, upgrades, or notices.

Tables Menu

All tables/forms are initially opened from the [Tables] menu. Select [Tables] and then the name of the table you wish to open. To close a table, select the Close button located on the bottom of each table/form.

Reports Menu

All reports can be found on the [Reports] menu. Selected reports can be found on the [Reports] tab of various tables/forms. Upon selecting a report you will be prompted to choose several options that affect the final report. The report will be displayed in your web browser in a table format.

Messaging Menu

The [Messaging] menu is used for sending messages and attachments to most any group of people in the People table (see section titled “Messaging” for detailed information about this feature). *Note:* The [Messaging] menu is visible only if EnableMAPI_Messaging is checked on the General Options form in the Configuration tables.

Tools Menu

The [Tools] menu has many tools available for upkeep and maintenance of the software. The functions are described in more detail throughout this document.

Window Menu

Once tables are open, you can use the [Window] menu to switch back and forth between the opened tables.

Time Saving Shortcut Keys

Shortcut Keys are keystrokes for power users who feel slowed down when they have to reach for the mouse. Holding down ALT and then pressing the underlined character can activate any button or menu item with an underlined character. Several shortcut keystrokes are outlined in the section "Navigating/Editing Training Records".

Quitting TrainingRegister®

Click [Save] or [Cancel] on any form that is being edited. To logout of TrainingRegister®, select [File], [User Logout]. Exiting TrainingRegister® will also perform a logout.

Getting Help/Training

Many forms have Instructions displayed to assist the user. More detailed instructions are provided in this User Documentation which can be accessed from the [Help] menu.

Contact your internal support person. This will most likely be the Training Administrator responsible for the TrainingRegister® database, your Database Administrator (DBA), or IT staff. These individuals work closely with the TrainingRegister® vendor and are trained to provide you with internal user support. They can set or reset your password and access privileges as needed. These individuals are responsible for backing up and compacting the database on a regular basis and can restore or repair the training records database should it become corrupted.

Contact the TrainingRegister® vendor for technical support or training. Contact information can be found on the Help menu and on the vendor's website.

<http://www.chriscollins.com> Phone support: (316) 942-4339

Novice, Advanced & Expert User Levels

Currently TrainingRegister® provides three personal user levels to control helpful or instructional messages and these levels might be used in the future to affect functionality. The three levels are Novice, Advanced and Expert.

Novice Level Messages can be very helpful to a new user but might be very annoying to an advanced or experienced user. An example of a Novice Level Message is the one that is displayed when the first table/form is selected from the [Tables] menu. It tells the user

they can open multiple forms and switch between forms using the Window menu. Most users will want to turn off the Novice Level Messages as soon as they gain proficiency with TrainingRegister®. This can be done by setting the user level to “Advanced”.

If a message is controlled by one of the three personal user levels it can be identified as such in its title bar. Example: The title bar of the message box reads “TrainingRegister® Novice Level Message”.

TrainingRegister® provides two ways to set the User Levels. 1) From the [Tables] menu select [Configuration Tables], [Personal Options], [User Level] to set or change the default level for the current user. 2) Temporarily change the User Level by selecting [File], [User Level Toggle].

Navigating/Editing Training Records

Database Navigation buttons are found in the bottom left area of each data form. Hovering the mouse pointer over each button will reveal a tool tip describing its function. Not all buttons are available on every form. A button may be dim, invisible or intentionally disabled.

Directly above the navigation buttons a message will display the number of records retrieved from the database or database server. To retrieve records use the [Find] button.

Shortcuts are identified by an underlined letter such as the "F" on the [Find] button.

[Find] permits searching for a specific record or group of records meeting certain search criteria or specifications. Shortcut is ALT+F.

[<] moves to the previous record when multiple records have been retrieved. Shortcut is ALT+SHIFT+<.

[>] moves to the next record when multiple records have been retrieved. Shortcut is ALT+SHIFT+>.

[Edit] permits making changes to the current record. The "current" record is the one displayed on the data form. Shortcut is ALT+E. Do not use this button to add a new record.

[New] permits adding a new record. Some fields may be filled with default data. Most fields will be empty and ready for data entry. Shortcut is ALT+N.

[Delete] permits permanently deleting the current record. Deleting a permanent historical training record is unusual, and requires a higher level of access. The user will be prompted with an "Are you sure?" dialog box to help prevent accidental deletion. Shortcut is ALT+D.

[Close] closes the data form or window. Shortcut is ALT+C on most forms.

[Save] will save changes or new data entered. Shortcut is ALT+S or ALT+ENTER on most forms. NOTE: On many data forms, the only way to save data is to click the [Save] button after making changes. This feature prevents accidentally making changes to the database. User Access Privilege settings can also be used to limit editing capabilities to specific individuals. This button is only displayed if a record is being edited or a new record is being added.

[Cancel] will cancel any changes or new data entered. Shortcut is ALT+C on most forms. This button is only displayed if a record is being edited or a new record is being added.

People Table

Use this form to enter information about people. This includes employees, students, instructors, supervisors and contacts for the companies table. Generally, these records should never be deleted if training records are associated with the person. Terminated individuals can be marked as inactive to keep them from appearing on most reports.

Entering a New Person

Click the [New] button on the People form to begin entering a new record. You will be prompted to enter a unique user ID before proceeding. Enter the desired data. First name, last name and ID number are required. All other fields are optional but may be required by company policy or to produce desired reports. Information is entered and updated in one table only. For example, if a person has an email address change, it is only modified in one place.

Once entered and linked to training, a record in the people table becomes part of the historical training records and should not be deleted unless it is desired to erase all related records. Use the "Inactive" checkbox to prevent terminated or inactive individuals from appearing on most reports. Check company policy before deleting terminated or inactive employees. Some situations require keeping training records for 30 years after a person terminates.

Schedule/Enroll an Individual for Training

To schedule an individual for training, go to the [Tasks] tab of the current person. Select the [Schedule/Enroll for Scheduled Training] button. Select one of the three choices for determining which classes will be displayed in the following list box and then use the drop-down list box to select the desired class. Select [OK] to complete the enrollment. If a scheduling conflict occurs, a notification will appear prior to continuing.

Remove/Drop from Scheduled Training

To remove an individual from a class, go to the [Tasks] tab of the current person. Select the [Remove/Drop from Scheduled Training] button. Use the drop-down list box to

select the class to remove. Select [OK] to continue. Select a reason from the drop-down list box and select [OK] to complete the removal.

Linking a Person to a Training Program

Training Programs are used to define required training. A training program is similar to a track, path or curricula. When a person is linked to a training program, they will be required to receive the training that is linked to the selected Training Program. To link an individual to a training program, go to the [Tasks] tab of the current person. Select the [Link to Training Program] button. Select [New] and use the drop-down list box to select a Program ID. Enter a target date if desired. Click [Save] to finish the task.

Linking a Person to a Skill

Use this form to link the current person to one or more skill classifications.

TrainingRegister® does not relate skills to training; rather skills are an independent method of classifying people. A person can be linked to a skill after completing training and/or demonstrating proficiency. To link an individual to a skill, go to the [Tasks] tab of the current person. Select the [Link to Skill] button and select [New]. Use the drop-down list box to select a skill. You may also choose to enter a skill level, the date acquired, or the approving supervisor. Select [Save] to complete the task.

Edit Training Records

This form is intended for repairing and querying training records. To edit a training record, go to the [Tasks] tab of the current person and select the [Edit Training Records] button. Select the record to be edited from the drop-down list box and select [OK] to continue. Select [Edit]. By design, not all fields can be edited manually. Make the necessary changes and select [Save] to complete the task.

Deleting a Person

This function can only be performed when logged in as a Training Administrator. From the [Tools] menu, select [Training Administrator], then [(2) All Rights Required], then [Delete All Records for Selected Person]. Follow the onscreen instructions. This procedure will permanently delete all related records for a selected person. After completing this task a person's record in the People table can be deleted by using the [Delete] button at the bottom of the screen.

Deleting a Duplicate Person

This function can only be performed when logged in as a Training Administrator. From the [Tools] menu, select [Training Administrator], then [(2) All Rights Required], then [Prepare to Delete Duplicate People Record]. This function is used to move completed training records from a source record in the People table to a destination record in the People table and then delete all remaining related records from the source record so it can be deleted. This can be useful if a person is entered in the People table twice. Only "Completed" training records are moved. All other related records for the source are deleted.

Companies Table

Use the Companies Table to enter company information about training providers, clients, licensing authorities, etc. Contacts for each company are in the People table. If you have a license for the multi-company version of TrainingRegister® then you can classify people by their company and base some reports on that company classification.

Entering a New Record

Click the [New] button on the Companies form to begin entering a new record. Enter the desired data. Company ID and Company Name are required. All other fields are optional but may be required by company policy or to produce desired reports.

Once entered and linked to training, a Company record becomes part of the permanent historical training records and should not be deleted.

ClassCatalog Table

Use this form to enter permanent information about a class, training, ISO document or learning experience of any kind. The information entered here should remain accurate for all who have received this training in the past. Generally, these records will never be deleted or changed once used. A class entered here once can be scheduled many times without modifying this record. Scheduling information is saved in the ClassSchedule table.

Adding a New Training Class

A training class is generally only entered one time in the ClassCatalog Table. The Class can then be scheduled multiple times, each time with different dates, times, locations, providers and costs. Click the [New] button on the ClassCatalog form. You will be prompted to enter a unique class ID before proceeding. Enter the desired data. Class ID, Title and a specified number of Hours are required. All other fields are optional but may be required by company policy or to produce desired reports. Click [Save] to save the new class data.

The default Provider and Location can be defined by selecting [Tables], [Configuration Tables], [Global Options], [General].

Deciding Between Editing or Adding a New Class

Edit or Add a New Class? Small modifications can be made to a class record as long as it is still an accurate description of the training received by participants in the past. Ask yourself: “If I change the class information will it be correct for the employees who took the training 5 years ago?” If the answer is yes, make the change. If the answer is no, add a new class.

Once entered and used, a training class record becomes part of the permanent historical training records and should not be deleted or changed (see comment above). **Deleting a**

class record will also delete it from the permanent training records of every person who ever took the class. Changing a class title, description or hours will produce false information about the training that has previously been administered.

Entering ISO Documents and Revisions

A new ISO document is entered as a new training experience (follow instructions under the section Adding a New Training Class). The ISO document will be treated as a class and can be linked to one or more training programs so employees will be required to read the document and receive the learning.

When a new version is released, open the existing record in the ClassCatalog table, go to the [Tasks] tab and select [Replicate for New ISO Document]. This Button will create an exact duplicate of the ClassCatalog record with a new ClassID. You will need to edit the Revision field to match the new ISO document revision and then click [Save]. All people who were required to receive the previous ISO document revision will be required to receive the new ISO document revision. After saving the new ISO document, return to the previous ISO document and remove its link to Training Programs (also done on the [Tasks] tab). The old ISO document will then no longer be required but will remain part of the permanent training records for each person who received it.

Combining Related Records in the ClassCatalog Table

This task may be useful if you accidentally created a duplicate class in the ClassCatalog table and wish to move all related records to another class and then delete the duplicate. To do so, select the [Tasks] tab on the ClassCatalog table and click on [Move Related Records]. You might be prompted to remove some related records or links before the process can be completed.

Designating Qualified Instructor(s)

Use this form to designate instructors who are qualified to teach this class. This is only needed if you wish to schedule a qualified instructor with a scheduled class. On the [Tasks] tab, select [Designate Qualified Instructor(s)]. Select [New] to designate the instructor. Select a qualified instructor from the drop-down list box. The only names in the instructor list box will be individuals from the People table who have been classified as an instructor. This is known as the master list of instructors. They cannot be scheduled until they have been designated qualified for the specific class. Select [Save] to complete the task.

Linking a Class to a Training Program

Use this function to link the training/lesson to a Training Program. Doing so will cause this training/lesson to be required for all people who are linked to the same Training Program. On the [Tasks] tab of the selected class, select [Link to Training Program]. Select [New] and choose a program from the drop-down list box. Add an interval only if the training is required on a periodic basis. If training is required only once per student then leave the interval at zero. Enter a TargetDate only if you want to overrule target dates set for individuals.

Linking a Prerequisite to a Class

Use this function to link a prerequisite to the currently selected training/lesson. Doing so will require prerequisite training prior to performing self-enrollment via the TrainingRegister® Web Module. Training Administrators may elect to override prerequisites when enrolling via the TrainingRegister® Administration Module. On the [Tasks] tab of the selected class needing prerequisites, select [Link to Prerequisite Classes]. Select [New] to add a prerequisite, then [Select/Change Prerequisite Class]. Classes from the ClassCatalog table can be selected by Title or ClassID. Click [Save] to complete the prerequisite addition.

Adding a Class Directly to One or More People

Use this procedure to enter completed training that was NOT scheduled and students were NOT enrolled. The end result is the same as using the large button on the tasks tab of the People form except this procedure permits selecting a group of people. The Current Class will be added directly to the training records of one or more people. A selected date will be used as the training completion date for all people selected. This procedure will skip people who are enrolled in any scheduled instance of the Current Class or already have a completion record for the Current Class. If training records are mistakenly entered they can be edited or deleted using an edit button on the Tasks tab of the individual. There is not a batch undo for this procedure. On the [Tasks] tab, select [Add This Class Directly to One or More People]. Select [Yes] to continue. Choose the group of individuals to which the class is being added, select [OK] and follow the onscreen instructions.

Special Security for a ClassCatalog Record

If the [Edit] button is clicked, a Class Title is changed, AND the ClassCatalog record is referenced in other tables, then the user will be prompted with a warning message and asked if they really want to save the changes. If they choose to continue they must have the permission named “All Rights” in order to save the record. If the record has not been referenced in other tables then the user can save changes or corrections without interference and no harm will be caused.

In addition the ClassCatalog record cannot be deleted if it has been referenced in other tables. The ClassID can be modified with a new unique value and the ClassID change will be replicated in all related tables.

Several times someone has clicked the [Edit] button on the ClassCatalog form when they should have clicked the [New] button to add a new record. They proceed to modify all the data displayed and save the record. Doing so makes it look like previous students received completely different training or a scheduled class. Actually the ClassCatalog record can be related to many other tables so much false information can be generated.

Deleting a Class

This function can only be performed when logged in as a Training Administrator. From the [Tools] menu, select [Training Administrator], then [(2) All Rights Required], then [Delete All Records for Selected Class]. This procedure will permanently delete all

related records for a selected ClassID. After completing this task the ClassCatalog record can be deleted. Follow the onscreen instructions.

ClassSchedule Table

Training or Lessons in the ClassCatalog table can be entered once and then scheduled hundreds of times. The ClassSchedule form is used to add a record containing scheduling information for a specific class in the ClassCatalog Table. Instructors, students, rooms and resources can be scheduled along with the ClassSchedule record. When the training is complete, enrollment records can easily be converted to “Completed” training records with a batch posting process.

Scheduling Process Overview

Classes are scheduled (instructions below); instructors, rooms, resources and students are scheduled with the scheduled class as desired; an enrollment roster/sign-in sheet is prepared and given to the instructor; scheduling conflicts are reviewed and dealt with as necessary; training is administered; people who did not show up for training are dropped; reasons are permanently recorded; grades/scores are recorded if desired.

All enrollment records are “Posted” with a single click. This batch process converts the training records from “Enrolled” to “Completed”. It also enters the number of class hours and updates several other fields with current classifications to facilitate reporting or review of the training records.

Scheduling a Class

Find and display a Class from the ClassCatalog table. This makes it available for scheduling. Open the ClassSchedule table/form and click [New] to schedule the current class displayed on the ClassCatalog form.

Adjust the beginning and ending dates and times to be correct. Enter a number greater than zero in the StudentMax field. This is required if you want to be able to enroll any students. Enter a date in the CancelDate field if you want the confirmation letter to request that students cancel on or before this date.

All other entries are either optional or for general information. Click [Save] to save the record.

Scheduling an Instructor

Click the [Schedule Instructor] button on the [Tasks] tab on the ClassSchedule form. Select a qualified instructor from the drop-down list box. Click [OK]. If no instructors are available in the drop-down list box then follow the on screen instructions to designate qualified instructors from the [Tasks] tab on the ClassCatalog form.

Removing an Instructor

Click the [Remove Instructor] button on the [Tasks] tab on the ClassSchedule form. Select the instructor from the drop-down list box. Click [OK].

Scheduling a Room

Click the [Schedule Room] button on the [Tasks] tab on the ClassSchedule form. Select a Room from the drop-down list box. Click [OK]. If no Rooms are available in the drop-down list box then none have been entered in the Rooms table. To add a selection, see instructions in the section for List Box Tables.

Removing a Room

Click the [Remove Room] button on the [Tasks] tab on the ClassSchedule form. Select the room from the drop-down list box. Click [OK].

Scheduling a Resource

Click the [Schedule Resource] button on the [Tasks] tab on the ClassSchedule form. Select a Resource from the drop-down list box. Click [OK]. If no Resources are available in the drop-down list box then none have been entered in the Resource table. To add a selection, see instructions in the section for List Box Tables.

Removing a Resource

Click the [Remove Resource] button on the [Tasks] tab on the ClassSchedule form. Select the resource from the drop-down list box. Click [OK].

Enrolling a Student

Find and display the student on the People form. Select [Schedule/Enroll for Scheduled Training] on the [Tasks] tab of the People form. Select the appropriate scheduled class from the drop-down list box, the desired scheduled instance of the class, and then click [OK]. You may check the box for “Show Provider and Room” and then click on [Refresh Scheduled Instances] to view additional details prior to class selection.

Enrolling a Batch of Students

Find and display the proper ClassSchedule record. Select the [Schedule/Enroll Students] button on the [Tasks] tab of the ClassSchedule form. Select the group of people you wish to enroll and follow the on screen instructions.

Note: People cannot be double enrolled. The same group can be selected time after time and only the new people will be enrolled. If the class is full, the extras are placed on a time stamped waitlist. People can be selected based on classifications used to classify their personal record such as Division, Department, Group, Job, Rank, Relationship, Shift, Employment date/range, those on a Waitlist, and those with a specific training requirement.

Note: If several people are enrolled as a group, such as all the people in a department, confirmation letters and waitlist letters are not prepared. The TrainingRegister®

Messaging feature can be used to send a user created text message and/or an attachment to all people on an enrollment roster or a waitlist. See section titled “Messaging”.

Enrolling a Batch of Students Based on Training Requirements

It is advised to run a report prior to performing this task to create a list of people who need a specific class. From the [Reports] menu select [Required / Needed Training Related Reports], and [People Who Need a Selected Class]. Enter the selection criteria to produce the report. To enroll these people, find and display the proper ClassSchedule record. Select the [Schedule/Enroll Students] button on the [Tasks] tab of the ClassSchedule form. Select [Schedule People Who Need this Training] and follow the onscreen instructions.

Note: People will continue to need this training until the class is complete and enrollment records are posted to history. Only then will they be removed from the list of people who need the training.

Prerequisite Checking When Enrolling Students

When enrolling a person from the [Tasks] tab of the People form or when enrolling a single person from the [Tasks] tab of the ClassSchedule form, if prerequisites are not met then the Training Administrator is presented with a choice to override the prerequisite checking, skip enrollment and display prerequisites, or to skip enrollment and the report.

When enrolling a group of people from the [Tasks] tab of the ClassSchedule form, the Training Administrator can elect to skip enrollments when prerequisites have not been met or to override prerequisite checking and enroll the group.

Dropping a Student

Prior to Posting enrollment records to history, students that did not show up for class should be dropped out. This can be done from the [Tasks] tab of the People or ClassSchedule table.

Select the [Remove / Drop from Scheduled Training] button on the [Tasks] tab of the People form. Select the scheduled class from the drop-down list box and click [OK].

or

Select the [Drop Student] button on the [Tasks] tab of the ClassSchedule form. Select the enrolled student from the drop-down list box and click [OK].

After posting enrollment records, students cannot be dropped but the record showing they completed the class can be deleted.

Note: A reason must be entered when dropping a student. To learn how to add selections to the list box, see the section titled List Box Tables.

Record a Cost for a Scheduled Class

Training expenses or the cost of a class can be entered for a scheduled class. All expense or adjustment entries must be made before posting enrollment records. Select the

[Record a Cost or Adjustment] button on the [Tasks] tab of the ClassSchedule form. Select [New]. Today's date will automatically appear in the Transaction date field, but can be adjusted as necessary. Select an account number from the drop-down list box. (To learn how to add account numbers to the list box, see the section titled List Box Tables). Enter a description. The expense or cost is entered in the debit field as indicated on the screen. If, for instance a caterer gives you money back because they fed fewer students, enter this amount in the credit field to reduce the total class cost. Click [Save] to save the record.

Grade or Score Students

Grades can be assigned to students of a class before posting enrollment records to history. Select the [Grade / Score Students] button on the [Tasks] tab of the ClassSchedule form. Click in the cell to edit. Enter an alphanumeric grade or click a Grade Button. Click [Close] when finished. The status field has been retained for compatibility with legacy client data. It has no specific purpose but may fill a special need. Like the grade field it accepts 3 characters or numbers and is retained with the permanent historical training records.

Post Enrollment Records to History

Upon completion of a class the following tasks should be performed: 1) drop students that did not show up; 2) grade students if grading is performed; 3) click the [Post Enrollment Records to History] button. This will convert enrollment records to completed training records. See the section "Posting Enrollment Records" for more details.

Cancel or Kill a Scheduled Class

In the event that a scheduled class is to be cancelled, click the [Cancel / Kill this Scheduled Class] button to erase all enrollment records and all scheduling records for instructors, rooms, resources and students. The ClassSchedule record should be deleted when this process is complete.

Prepare an Enrollment Roster / Sign-in Sheet

Select [Enrollment Roster] from the [Reports] tab on the ClassSchedule form. Take all the default choices to produce a simple sign-in sheet.

Waitlist Function

If a person is placed on a waitlist, they are linked to a ClassID in the ClassCatalog table not the specific scheduled class for which they attempted enrollment. The waitlist record is time stamped. For convenience, the ClassCatalog form displays the number of people waiting for the class. The count is refreshed each time a ClassCatalog record is selected and displayed.

How a Person Gets on a Waitlist

When enrollment is attempted and a scheduled class is full the person is placed on a waitlist and that record is time stamped. If enrolling with the button on the [Tasks] tab of the ClassSchedule form, this action occurs without asking. If enrolling individuals with the button on the [Tasks] tab of the People form, the login user will be notified that the class is full and asked if they want the person placed on a waitlist.

When enrollment is attempted with the Web Module, the person is automatically added to the waitlist and the record is time stamped. The login user will receive an instant page that indicates the person has been placed on a waitlist. The login user could be the employee/student, a supervisor or an administrator depending on permissions granted.

Note: The Student Max value for a scheduled class can be easily increased to permit enrollment of more students. If enrolling a group, simply enroll the same group again and the seats will be filled from those belonging to the group and also on a waitlist. Duplicate enrollments will not be created. Those already enrolled will be skipped.

Removal from a Waitlist

When the person is successfully enrolled in any scheduled instance of the class for which they are waiting they will be automatically removed from the waitlist. TrainingRegister® will convert the training record from “Waiting” to “Enrolled” and enter an action date.

Waitlist Report

A Waitlist Report is available from three places for convenience. In all cases the waitlist report will be based on a ClassID rather than any scheduled instance. The report can be found on the reports menu and on both the ClassCatalog and ClassSchedule [Reports] tabs.

Enrollment from Waitlist – TrainingRegister® Decides

The waitlist can be used as a source when performing a group enrollment. Simply select “Enroll People From Waitlist” when performing a group enrollment. People placed on the waitlist for any scheduled instance of the training will be automatically enrolled until the class is full.

Enrollment from Waitlist – Training Administrator Decides

A training administrator can pick and choose who to enroll rather than letting TrainingRegister® make that decision. Simply print the waitlist and manually enroll individuals.

Waitlist Confirmation Letter

The option to prepare a waitlist confirmation letter will be available when enrollment of an individual fails. If several people are enrolled as a group, such as all the people in a department, confirmation letters are not prepared. If people are granted permission to self-enroll with the Web Module, they will be presented with instant confirmation indicating success of the task. They are not mailed a confirmation letter. In addition, they can confirm their enrollment by viewing the enrollment roster for the class they

selected and their own personal training schedule. If people are not granted permission to self-enroll with the Web Module then an enrollment request is emailed to either the person's immediate supervisor or the training administrator, or both. Enrollment is then performed manually using the Administration Module and a confirmation letter can be prepared. The TrainingRegister® Messaging feature can be used to send a user created text message (confirmation letter) and/or an attachment to all people on an enrollment roster or a waitlist.

Tracking Training Costs

Each training record linking a person to a learning experience can contain a cost for training that person. Training records can also be classified by division, department, group, job and others. If costs and classifications are recorded with the training records then reports can be generated from the training records showing the total cost of training an individual for a date range, the total cost of training all the people in a department for a date range, etc. Costs can be recorded with the permanent training records using one of two methods.

The first method involves entering a value for training a single person on the ClassCatalog form and then directly linking people to that class. The enrollment process is skipped. The value entered on the ClassCatalog form is saved with the training record for each person who is directly linked to the class. The cost value on the ClassCatalog form affects only training records that are created after the cost has been entered or changed.

The second method of recording training costs with each training record involves scheduling a class. Costs are linked to a scheduled class using a button on the tasks tab of the ClassSchedule form. Each cost is entered as a transaction with a date, an account number, description and an amount. When the class is finished and the enrollment records are posted or converted to completed training records, the total of all transactions is divided equally among each student and recorded in their permanent training record.

Posting Enrollment Records

Enrollment records are simply records in the TrainingRecords table that are classified as “Enrolled” and lack Hours, CEU, etc. because the training has not been completed. The “Posting” process converts the records to “Completed” and credits the students with the appropriate training history. This topic will describe what happens in this process.

Grading

If you wish to Grade students or enter a value in the Status field, be sure to complete this task before you perform the Posting as described in this section. This can be done later but it is much easier to do before Posting.

Grading is performed by selecting the [Grade / Score Students] button on the ClassSchedule [Tasks] tab.

Posting

Posting is performed by selecting the [Post Enrollment Records to History] button on the ClassSchedule [Tasks] tab. The following describes what happens behind the scenes.

Recording Training Costs:

The button [Record a Cost or Adjustment] is used to add costs in the form of a transaction. You will be prompted to select an account number, enter a description and enter a debit or credit amount. Multiple transactions can be recorded and a report detailing all transactions can be prepared. This data can also be exported for custom reporting.

When enrollment records are posted or converted to “Completed” training records all costs/transactions are totaled and divided equally among each student. This cost per student is saved with the training record along with the student’s current division, department, group and job classification.

Modification to the Training Record:

The ClassScheduleID field is erased removing any link to the ClassSchedule record.
The Completed field is filled in with the ClassEnd date on the ClassSchedule form.
The Phase field is converted from “Enrolled” to “Completed”.
The Hours field is filled in with the Hours as defined on the ClassCatalog record.
The CEU field is filled in with the CEU as defined on the ClassCatalog record.
The Cost field is filled in with the Cost Per Student value described above.

In case the classifications for the Student or Employee have changed since they were enrolled, the following fields are updated:

The DivisionID field is updated with the DivisionID currently used to classify the person.
The DeptID field is updated with the DeptID currently used to classify the person.
The GroupID field is updated with the GroupID currently used to classify the person.
The JobID field is updated with the JobID currently used to classify the person.
The RankID field is updated with the RankID currently used to classify the person.
The AccountCode field is updated with the AccountCode currently used to classify the person.

The scheduling record in the PeopleSchedule table is deleted.

If the RequirementAutoUpdate switch is checked in the Global Options tables then the Program Requirements for each student is also updated to reflect the completed training.

These activities can be confirmed by viewing each students Training Records, Training Schedule and Training Program Requirements report before and after posting.

Because the records are no longer linked to the ClassSchedule record, the number of people enrolled will drop to zero.

The Posted date on the ClassSchedule form will be filled in with the current system date and the Posted2History checkbox will be checked for reference. A Posted ClassSchedule record is frozen from use and cannot be edited.

The ClassSchedule record may be deleted or retained for future reference. It cannot be used for scheduling.

Training Programs

Tracking Required Training Based on Program Requirements

Training Programs are used to track the progress of specific required training for individuals or groups of individuals. A training program is sometimes called a path, track or curricula. Required training can be specified for virtually any reason. Often training is required because a person is a new employee, works in a specific location, or performs a specific task. The possibilities are unlimited. A training program can contain one or more classes, and a person can be linked to one or more training programs.

Reports can be generated to display what training needs to be administered, who needs each class, and how each individual is progressing on their required training. Some of these reports can be created based on a specific Rank, Job, Group, Department, or Division. Groups, Departments, and Divisions can be linked to specific Supervisors. If a multi-company license is purchased, required training can be tracked by the Company classification of individuals.

Creating a Training Program Name

The first step is to create or invent a training program name. The program name should have meaning to those who will view the reports. If training is required for a specific task, then name the program with that task. If training is required because a person is in a specific department, then name the program with that department name. If training is required for all new employees, then name the program accordingly, i.e. "New Employee Orientation".

Next, add the new Program name to the list of programs. The Programs table is accessed from the [Tables] menu. Select [List Box Tables], [Required Training Related List Boxes], then [Programs]. Confirm your new program name does not already exist, and then click [New] to add a new record.

Linking a Class to a Program

Locate the specific class in the ClassCatalog table. Select the [Tasks] tab and then click [Link to Training Program]. Confirm the class is not already linked to the program, and then click [New] to add a new record.

Select the Program from the list box. Add a monthly interval if the training is to be received periodically by each person. Enter a TargetDate if you wish all people required to receive the training receive it by the same TargetDate. This target date will overrule the target dates entered for each person.

Linking a Person to a Program

Locate the specific person in the People table. Select the [Tasks] tab and then click [Link to Training Program]. Confirm the person is not already linked to the program, and click [New] to add a new record.

Select the Program from the list box. Add a TargetDate if desired. A target date entered at the class level will overrule a target date entered here. If no target date is entered, the training will be due now and will be included on reports displaying needed training regardless of the future date entered in the report selection process.

Linking a Program to a Group

This function will add a training program to a selected group of people. From the [Tools] menu select [ProgramRequirements Tasks], [Add Training Program to Group of People]. All classes that are linked to the specified training program will be required for each individual belonging to the selected group.

Removing a Program from a Group

This function will add a training program to a selected group of people. From the [Tools] menu select [ProgramRequirements Tasks], [Remove Training Program from Group of People]. All classes that are linked to the specified training program will no longer be required for each individual belonging to the selected group.

Behind the Scenes

A hidden table named “ProgramRequirements” is used to produce reports displaying what training needs to be administered, who needs each class, and how each individual is progressing on their own training requirements.

The automatic updating of records in the “ProgramRequirements” table is triggered by any change that would affect the requirements of an individual. These include any change made in the linking of a class to a program, a person to a program, or completion of a required class.

Most of the fields are self-explanatory. It may be helpful to understand how the TargetDate, CompletedDate, Interval and NextDue fields are calculated and how they are used.

As an example, when a report is generated to display all people who need a specific class, the ProgramRequirements table is queried for matching records which have a NextDue date that is either not empty or contains an earlier date than a user specified future date. The NextDue date will be empty if the training has been completed and is not required again in the future.

TargetDate

The target date is first selected from the record that links the class to the program. If a target date is not found then it will be selected from the record that links the person to the program. If no target date is found then that field will be left blank.

CompletionDate

This is the date the class was last completed. The TrainingRecords table is searched to determine if and when the person last completed the class.

Interval

The interval is selected from the record that links the class to the program. The interval will be zero if the training is required once in a lifetime for each person. Otherwise it will have a monthly periodic interval greater than zero.

Note: If you use a periodic interval when linking a ClassCatalog record to a training program, make sure no target dates are entered for the class or the person who needs the class. If you use a target date don't use a periodic interval for any training affected by the target date. TrainingRegister® is not programmed to make a decision when both a target date and a periodic interval are involved

NextDue

The presence of a date in this field indicates the training is needed and specifies when it is due.

Periodic Training: If the class has been completed then the NextDue date is calculated by adding the monthly interval to the last completion date. If the class has never been completed then the NextDue date is the same date the record was created or last updated. Periodic training will always be needed. Report selection permits selecting training that is needed prior to a user specified future date.

Non-Periodic Training: If the class has been completed then the NextDue date is left blank, indicating the class is not needed. If the class has not been completed and a target date is found, then the target date will be used for the NextDue date. If the class has not been completed and a target date is not found, then the NextDue date will be the same date the record was created or last updated. Non-periodic training will either be needed or not needed, indicated by the presence or absence of a NextDue date.

Messaging

The Messaging Menu is used for sending messages and attachments to most any group of people in the People table including the following:

- One or more individuals based on data or classifications in their People table record

- Students on an Enrollment Roster
- People on a Waitlist
- People who Need a Class/Training
- People who are Linked to a Training Program

Note: The [Messaging] menu is visible only if EnableMAPI_Messaging is checked on the General Options form in the Configuration tables.

Testing the Messaging Feature

To test the Messaging feature, a recipient is needed to receive the test message. Because the Sample database is filled with fake e-mail addresses, add yourself to the People table and enter your email address at the bottom of the [Contact] tab.

From the [Windows] menu, open the People table. Click the [New] button located in the bottom left corner of the window. Enter in a unique people ID and click [OK]. For demonstration purposes, a last name, date of birth, or SSN will work. Fill out the required information on the [General] tab. Switch to the [Contact] tab and enter in an e-mail address. At this time no other information is necessary. Click on the [Save] button at the bottom of the window.

Note: Actual mail will be sent to this e-mail address. Please use a working e-mail that is accessible.

Sending a Message to Test Recipient

The Test Recipient is used so that if there is an error or the e-mail is wrong, the user can see the actual e-mail in his/her inbox to inspect it before sending it out to a large group of people if it happens to be incorrect.

Click on the [Messaging] menu at the top of TrainingRegister® and select [Create / Send Message]. Enter a subject in the Subject Field. You may choose to select a salutation or the default selected is No Salutation. Type or paste the message into the Message Field. To attach a file, use the [Select Attachment] button.

Note: The message can be typed, retrieved from a text file or Pasted from the Windows Clipboard using the buttons at the bottom of the Message Body field.

Click on the [Select Recipients] tab. Click on the [Select Test Recipient] button in the top right corner of the form. Click [OK] to search by last name. Enter in YOUR last name, click [GO], and select yourself from the list box. The form is now filled with your name, e-mail address, and ID.

Click on the [Send / Test Message] tab. Click on the [Send Test Message] button. A report will display the list of recipients, whether or not the message was skipped, and the subject, message and file name for any attached file.

Without closing TrainingRegister®, send and receive your e-mail to make sure everything looks acceptable. If all is well, return to TrainingRegister®.

Note: If your system is configured with a MAPI compliant email program the message will be placed in your Outbox. If this does not work correctly contact your IT support staff and/or TrainingRegister® support staff. Installation details can be found in the [Technical Notes] located on the [Help] menu.

Selecting Multiple Recipients

The [Select Recipients] tab contains several buttons for selecting recipients. The selection process is similar to selecting records for the corresponding reports.

Click [Selected Recipients Report] to see the recipients without actually sending the message.

Select the [Send Message] button to send the message and produce the report. Recipients are skipped if their email address is missing or appears defective. A recipient marked as “Sent” only means the message was placed in the Outbox. It does not verify delivery.

List Box Tables

All list boxes found throughout the software are configured using a table. The only exception is the Languages table. Its values contain only "English" and "Spanish", and cannot be changed. Each table can be found on the [Tables] menu, [List Box Tables], select the appropriate category and then the specific table for the list box you are configuring. To add a choice to a list box, select [New]. To run a report of all the choices, select the [List] button under the entry box or select [List Boxes...] from the [Reports] menu. You may also edit or delete a choice from this table.

Date/Time Entry and Formatting

Overview

TrainingRegister® uses two different kinds of date entries because some date fields must be erasable and optional, while others require an entry. Date/time entry and display formats are handled both by Windows and by optional settings within TrainingRegister®.

Standard Date Fields (erasable) look like any other text box and have a small button to let the user access a Windows Date/Time Picker and its pop-up calendar. An example is the termination date on the People form. The date entry is optional and can be erased if the person is rehired. The entry in the date field can be deleted or edited with the keyboard. If a date is selected using the pop-up calendar, it will be inserted in the date field. The display format for these fields is controlled by the Windows Short Date format, which can be configured in the Windows Control Panel. The entry format in this field is

controlled by settings within TrainingRegister®. These settings are found from the [Tables] menu, [Configuration Tables], [Global Options], [Date/Time Formatting]. If the Standard Date Field does not display with the same format used for entry or it does not recognize the entry as a valid date, then configuration of Windows or TrainingRegister® or both will be needed. If Windows cannot interpret the entry as a valid date, then the date will not be saved and the date field will appear blank.

Required Date Fields (non-erasable) look more like the date fields used in the Microsoft Outlook calendar. The Windows Date/Time Picker is displayed on the form. An example is the ClassBegin date on the ClassSchedule form. The date can be edited with the keyboard but not deleted. The pop-up calendar can also be used to select a date. The display and entry formats for these fields are controlled by settings within TrainingRegister®. These settings are found from the [Tables] menu, [Configuration Tables], [Global Options], [Date/Time Formatting].

If a needed format is not listed, please contact the vendor with a request.

Supervisor Record Filtering

The [Find] button on the People table in the Administration Module and the [Find/Select a New Person] button in the Web Module are protected to prevent unauthorized retrieval of records. In order for these buttons to work one of the following conditions must be met:

- 1) The login user has been granted the security right “(4) View All People”.
- 2) The login user is classified as a supervisor of a Division, Department or Group.

Condition 1 overrides condition 2. If a login user is a supervisor of a Division, Department or Group and they have the right “(4) View All People” then they can use the [Find] button to search for and view the records of any person in the table.

If a person is a supervisor and they do not have the right “(4) View All People” then they will only be able to search for and view the records of the people under their supervision.

Web Module

The above works exactly the same on the Web Module except that it also controls the login user’s ability to get beyond the ability to only see their own records.

One of the above conditions is required to either search for an individual or access any of the Supervisor or Administration level menus.

Supervisor Filtering

The filter is set for the highest level found. If a person is a supervisor of both a Division and a Department they will have rights to retrieve and view all employees under their division supervisor control. The department level will be ignored.

The levels are Division, Department and Group with the Division being the highest level and the Group being the lowest level.

Reporting

Locating Reports

[Reports] Menu. All reports can be found on the [Reports] menu located on the top menu bar in the line [File], [Tables], [Reports], [Tools], [Messaging], [Window] and [Help].

Reports are grouped according to base of origin or topic. Required and Needed Training reports are generally grouped together even though they might be based on a person, class or training program. A brief overview of reports available from the [Reports] menu can be found in the appendix.

[Reports] Tab. Some forms contain a [Reports] tab. If so, a few common reports will be replicated on this tab. An example is the [Reports] tab on the ClassCatalog form. Generally, reports found on the [Reports] tab of a form will be specific to the record displayed on that form which is referenced as the Current Person or Current Class.

A few reports are replicated on some of the forms. An example would be the form for entering new Training Programs. A button permits quickly viewing all existing programs.

A few reports are available only to the TrainingRegister® system administrator for diagnostic, security and testing purposes.

Closing Reports

All reports are displayed in the user's default browser. Simply close the browser to close the report.

Safety of Data with Reports

No report in TrainingRegister® will modify the master database in any way. Making choices on reports cannot damage data.

Customizing TrainingRegister® Reports

Most report selections will prompt the user to make some choices. If choices are made more choices might be requested. Pressing the ENTER key or clicking [OK] to take the default selections will produce a predefined report with all available records. For instance, selecting a specific Job will limit the records to people or training records classified with that Job.

A Supervisor can extract many reports. To accomplish this, select the specific Division, Department or Group for which the supervisor is in charge.

Printing or Emailing Reports

All reports produced by TrainingRegister® are written to C:\TrReports and are displayed in the user's default browser.

To Email a displayed report with Internet Explorer, select [Tools], [Mail and News], [Send Page] or select the mail icon on the IE tool bar. This will launch the user's default email program.

To print a displayed report, simply print it as you would any web page.

Some reports in TrainingRegister® are emailed directly by communicating with the user's MAPI compliant default email program. This feature can be turned on or off to accommodate users with or without compatible equipment and software.

Copying Data to Excel

Most reports contain data that can be copied to an empty Excel spreadsheet. Display the grid on the report and then use the mouse to copy all or part of the data contained in the cells to the Windows clipboard. Open a blank Excel spreadsheet and paste.

Using an External Report Writer

TrainingRegister® permits making a complete copy of the database in Access format. It is also possible to export a single table to an Access table or a comma-delimited file. The resulting Access file and/or the comma-delimited file will not be password protected and can be used with external report writers or other systems. *Note:* The exporting feature is not available on the demo version and may be turned off by IT staff for security reasons.

If TrainingRegister® is licensed for use with a database server such as SQL Server or Oracle, then your database administrator may grant you "Read Only" privileges to the database for reporting purposes. The TrainingRegister® standard software license states that "Read Only" privileges may be granted to users or other systems.

Description of Report Categories

This section describes the types of reports found in each report category. Because of the endless possibilities, we will not make an attempt to document or display an example of every report, however more detail can be found in the appendix. It makes better sense to simply experiment with all the choices for each report. Data cannot be damaged or modified by running reports.

People Related Reports – Reports centered on an individual or group of individuals. For example, Training Records or a Training Schedule for an individual, or a list of people who meet report selection criteria.

ClassCatalog Related Reports – This section contains many different reports. For example, a list of classes meeting report selection criteria, completed training records, or scheduled times and dates a class is offered.

ClassSchedule Related Reports – Reports related to scheduled classes. For example, the class roster, sign-in sheet, waiting list, cost summary, or a list of all scheduled classes for a specific date range.

Required/Needed Training Related Reports – Reports will only show data if people and classes are linked to training programs. Training programs are used to identify classes that are required for individuals for various reasons. For example, all required classes, people who need a specific class, classes that are part of a training program, or people who are linked to a training program.

Skill Tracking Reports – Reports related to skills. For example, a list of people who have a specific skill or a list of skills for a specific person.

List Box Reports – Reports listing choices for all drop-down list boxes on each of the different forms. For example, departments on the People table, providers on the ClassCatalog table, and resources on the ClassSchedule table.

Training Records - Other – Reports displaying the selected information for training records.

Security Reports – Reports displaying information about security settings.

Selecting and Tagging Records

Tagging - Overview/Purpose

Tagging can be used to enhance reporting capabilities and perform a few batch processes like enrolling a selected group of people or putting a selected group of individuals in a training program. Generally, tagging is not needed because TrainingRegister® provides many other ways of selecting a group of people.

The tagging process permits a user to select only certain records for inclusion on reports or for merging with Microsoft Word. A little knowledge gained in this section can open the door for advanced reporting capabilities using the reports that are included with TrainingRegister® or by marking records for reporting with an external custom report writer.

Tagging will be necessary if records cannot be selected with one of the many options provided. For example, if all people in a department are to be enrolled, tagging is not needed because this option is provided. If all people in a particular city are to be enrolled in a class then it would be necessary to tag the people who meet the desired search criteria and then enroll the tagged people.

Tagging for Single Records

A single record can be Tagged by simply checking the "Tag" checkbox on the People form or the ClassCatalog form. The [Edit] button must be selected before field values can be changed.

Tagging for Multiple Records

Multiple records meeting a user's search specifications can be tagged simultaneously by using buttons found on the [Tasks] tab on the People form.

Other Options

[Tag All Records] – This button will tag all the records in the database.

[UnTag All Records] – This button will untag all the records in the database. Be sure to untag all records before beginning a new operation. Records stay tagged until they are specifically untagged.

[Tag Retrieved Records] – This button will tag all records that have been retrieved using the [Find] button.

[UnTag Retrieved Records] – This button will untag all records that have been retrieved using the [Find] button.

[Count Tagged Records] – This button will count how many records are tagged in the database and provide the user with a current number.

[Invert Tagged Records] – This button will untag all records that have been tagged, and tag all records that were not tagged. This can be especially helpful when needing to tag everyone except for a small set of individuals, which can be achieved by tagging the small set and then inverting the tagged records.

Data Export

All data from a selected table can be exported to a comma-delimited file or to an Access database. All data in all tables can be exported to an Access database. The resulting files are not password protected and can be used for custom reporting or to feed another system with data from TrainingRegister®. Passwords saved in the TrainingRegister® database are encrypted.

A comma-delimited file can usually be opened with Microsoft Excel by simply double-clicking the file. Access files can be opened with Microsoft Access, Microsoft Word, SQL Server and custom report writers like Crystal Reports.

Export a Table to a Comma-Delimited File

1. Select [Tools], [Export], [Table to Comma-Delimited File].

2. Select the table to export from the list box.
3. A message displays the name and location of the comma-delimited file.

Export a Table to an Access File

1. Select [Tools], [Export], [Table to Access File].
2. Select the table to export from the list box.
3. Select or Create the Destination Database.
4. A message displays indicating the success of the copy and the name and location of the Access File.

Export All Tables to an Access File

1. Select [Tools], [Export], [All Tables to Access File]
2. Select or Create the Destination Database.
3. A message displays indicating the success of the copy and the name and location of the Access File.

Note: TrainingRegister® may contain tables that contain no data. The reason could be that the tables have not been used or that the tables are intended for future use.

Empty tables might be skipped as indicated in the on screen messages. This does not mean anything is wrong.

Microsoft provides us with a function to quickly replicate a Jet database to an Access database. If your TrainingRegister® license is for use with a Jet database, the Export All Tables to an Access File will be very quick. Otherwise, each table and each record are copied one at a time and the process may take a few minutes.

Useful Reports Used for Data Export

Three reports specifically designed for data export can be found under [Reports], [Training Records – Other]. When using these reports, all data within the grid, including the column headings, can be copied to the Windows Clipboard and pasted into an empty Excel spreadsheet.

SQL Searching

Using SQL to Select Records

All four tables can be searched using a technique called Standard Query Language (SQL) or Sequel. **SQL searching offers extended user flexibility.** After the records are selected, they may be tagged and used for a report, merge, or other special feature.

SQL is an industry-standard database language that has origins from the early 1970's and is used on many large computer systems, SQL Server and Oracle. The TrainingRegister® database supports SQL searching.

It is not necessary to learn all about SQL. Generally, users only input something as simple as "field name = search value". For exact syntax, see the next few pages for examples of searching Text, Memo, Date, Numeric, and Boolean fields.

Those who want to perform more sophisticated searches can use any valid SQL comparison operator. Examples of comparison operators are "=", "Like", ">", and "<". Key words "AND" and "OR" can also be used.

Users CANNOT DAMAGE OR CHANGE the database with SQL searching.

To enter search criteria, click the [Find] button on the desired table and then select the [SQL Query] option. Enter the field name, comparison operator and search value in the "Where" text box. No other box needs to be edited. TrainingRegister® will construct the rest of the SQL statement automatically.

The constructed SQL statement is often displayed for your viewing pleasure and troubleshooting. It is not necessary to understand or read this statement.

Entering SQL Search Criteria

Click the [Find] button on the desired table. Select the [SQL Query] option in the Search Method box and select [OK]. Enter a search specification in the box or select a previously saved query from the drop-down list box.

After searching, the records matching the search specification will be displayed.

SQL Searching Text and Memo Fields

Rules:

Syntax: WHERE FieldName = 'CHARACTERS TO SEARCH FOR'

Characters to search for are not case sensitive and must be enclosed in single quote marks.

Sample search strings:

WHERE Last = 'SMITH'

Finds all records where the last name is "Smith".

WHERE Last LIKE 'SMITH%'

Finds all records where the last name begins with "Smith". Notice the percentage symbol at the end of the search string.

WHERE DevelopmentPlan LIKE '%ENGINEER%'

Finds all records where the DevelopmentPlan memo field contains the characters "engineer" anywhere in the field. Notice the percentage symbol at the beginning and end of the search string.

WHERE DevelopmentPlan LIKE '%ENGINEER%' OR DevelopmentPlan LIKE '%DEVELOPER%'

Finds all records where the DevelopmentPlan memo field contains either the characters "engineer" or the characters "developer". Notice the logical operator "OR" and the percentage symbol.

```
WHERE DevelopmentPlan LIKE '%ENGINEER%' AND DevelopmentPlan LIKE '%DEVELOPER%'
```

Finds all records where the DevelopmentPlan memo field contains both the characters "engineer" and the characters "developer". Notice the logical operator "AND" and the percentage symbol.

```
WHERE Classify1 = 'EMPLOYEE'
```

Finds all records where the Classify1 field has the value of "employee".

```
WHERE Classify1 <> 'TERMINATED'
```

Finds all records where the Classify1 field is not equal to "terminated".

```
WHERE HomePhone = '316/555-1212'
```

Finds all records where the home phone field has a specific phone number.

SQL Searching Date Fields

Rules:

Syntax: WHERE FieldName = DateValue('MM/DD/YYYY')

Date to search for must be enclosed in single quote marks and the DateValue function must be used to enter a specific date value.

Sample search strings:

```
WHERE HireDate = DateValue('8/15/1995')
```

Finds all records where the employment date field equals 8/15/1995.

```
WHERE HireDate > DateValue('6/1/1990')
```

Finds all records where the employment date is newer than 6/1/1990.

```
WHERE HireDate BETWEEN DateValue('1/1/1989') AND DateValue('12/31/1990')
```

Finds all records where the employment date falls in 1989 or 1990.

```
WHERE TermDate BETWEEN DateValue('2/1/1998') AND DateValue('2/28/1998')
```

Finds all records where the Termination date falls in February 1998.

```
WHERE Month(HireDate) = 6
```

Finds all persons hired in the 6th month or June.

```
WHERE Year(HireDate) = 1996
```

Finds all persons hired in 1996.

```
WHERE Month(DOB) = 3 AND Day(DOB) = 15
```

Finds all persons whose birthday is March 15.

SQL Searching Numerical Fields

Rules:

Syntax: WHERE FieldName = NUMBER

Numbers to search for must not be enclosed in single quote marks.

Sample search strings:

WHERE Hours >= 20

Finds all records where the class hours are equal or greater than 20.

SQL Searching Logical (yes/no) Fields (Boolean type fields)

Rules:

Syntax: WHERE FieldName

Logical Operators: NOT

Sample search strings (for Jet database):

WHERE Instructor

Finds all records where the Instructor field is True or Checked.

WHERE NOT Tag

Finds all records where the Tag field is False or Un-Checked.

Sample search strings (for SQL Server database):

WHERE Instructor = 1

Finds all records where the Instructor field is True or Checked.

WHERE Tag = 0

Finds all records where the Tag field is False or Un-Checked.

Global Option Settings

General

DefaultProviderID – This value is used when creating a new ClassCatalog record.

DefaultCity – Used when creating a new Companies or People record.

DefaultStateProvince – Used when creating a new Companies or People record.

DefaultCountry – Used when creating a new Companies or People record.

ForceUpperCase – If checked, lower case letters cannot be used. Initial setting = unchecked.

EnableMAPI_Messaging – If checked, TrainingRegister® will send email using the user's MAPI compliant email program such as Outlook or Outlook Express. Remove check to disable this feature. Initial setting = checked.

Date/Time Formatting

Standard Date – Defines or controls the entry only of dates typed in a standard date fields. Dates entered must be recognized by the local settings for the operating system. Initial setting = "MM/dd/yyyy" (03/28/2002) (USA).

Date Picker – Controls entry and display of dates when the date/time picker is used to enter dates. Initial setting = "dddd MM/'dd'/'yyyy" (Thursday 03/28/2002) (USA).

Time Picker – Controls entry and display of times when the date/time picker is used to enter times. Initial setting = "hh':mm tt" (02:00 PM) (USA).

English Report Short Date – Controls display of dates on English reports when a short date is used. Initial setting = "MM/dd/yyyy" (03/28/2002) (USA).

English Report Long Date – Controls display of dates on English reports when a long date is used. Initial setting = "mmmm d, yyyy" (March 28, 2002) (USA).

English Report Time – Controls display of times on English reports when time data is used. Initial setting = "hh:mm AMPM" (02:00 PM) (USA).

Spanish Report Short Date – Controls display of dates on Spanish reports when a short date is used. Initial setting = "dd/MM/yyyy" (28/03/2002).

Spanish Report Long Date – Controls display of dates on Spanish reports when a long date is used. Initial setting = "dddd, dd ""de"" MMMM ""de"" yyyy" (Friday, 28 de March de 2003). Spelling may be different depending on OS settings.

Spanish Report Time – Controls display of times on Spanish reports when time data is used. Initial setting = "HHmm ""hrs."" (1400 hrs.).

Confirmation Letter

DefaultConfirmationHeader – Defines the header used on enrollment confirmation letters and is used to fill the related field when a new ClassCatalog record is created. When a confirmation letter is created this default value is used if the header has not been defined in the ClassCatalog record. Initial setting = "This letter is to confirm your enrollment in the following training:"

DefaultConfirmationFooter – Defines the footer used on enrollment confirmation letters and is used to fill the related field when a new ClassCatalog record is created. When a confirmation letter is created this default value is used if the footer has not been defined in the ClassCatalog record. Initial setting = "If you wish to cancel or postpone, please do

so on or before the last free cancellation date listed above. The dress code for this training is business casual. Sincerely, Training Administration Team"

DefaultConfirmationHeader_Sp – Same use as the DefaultConfirmationHeader but will be used when the recipients preferred language is set to Spanish. Initial setting = "Has sido convocado/a al siguiente entrenamiento:"

DefaultConfirmationFooter_Sp – Same use as the DefaultConfirmationFooter but will be used when the recipients preferred language is set to Spanish. Initial setting = "Si desea cancelar o posponer, por favor hágalo a más tardar en la fecha de cancelación sin cargo indicada arriba. El atuendo sugerido para la sesión es elegante sport."

ConfirmationIncludeTuition – Defines whether or not to include the Tuition on confirmation letters.

ConfirmationIncludeCancelDate – Defines whether or not to include the CancelDate on confirmation letters. Students can be requested to cancel on or before this date.

Waitlist Notification Letter

DefaultWaitListNotifyHeader – Defines the header used on a waitlist notification letter. Initial setting = "Thank you for your computer training registration. Unfortunately, due to enrollment limitations you have been placed on a WAIT LIST for the following."

DefaultWaitListNotifyFooter - Defines the footer used on a waitlist notification letter. Initial setting = "Should space become available in this class, you will be enrolled and sent a confirmation letter. If you have any questions, contact your training administrator. Sincerely, Training Administration Team"

DefaultWaitListNotifyHeader_Sp – Same use as the DefaultWaitListNotifyHeader but will be used when the recipients preferred language is set to Spanish.

DefaultWaitListNotifyFooter_Sp - Same use as the DefaultWaitListNotifyFooter but will be used when the recipients preferred language is set to Spanish.

Individual Schedule

DefaultIndividualScheduleHeader - Defines the header used on a schedule for an individual. Initial setting = "You have been scheduled for the following training:"

DefaultIndividualScheduleFooter - Defines the footer used on a schedule for an individual. Initial setting = "Please note any scheduling conflicts. Contact your training administrator, supervisor, or the instructor for the class if you have any questions or need to cancel."

DefaultIndividualScheduleHeader_Sp – Same use as the DefaultIndividualScheduleHeader but will be used when the recipients preferred language is set to Spanish.

DefaultIndividualScheduleFooter_Sp - Same use as the *DefaultIndividualScheduleFooter* but will be used when the recipients preferred language is set to Spanish.

Required Fields

ReqClassGrouping – If checked, a *ClassCatalog* record cannot be saved unless a valid *ClassGrouping* is selected from the list box.

ReqSubjectCategory – If checked, a *ClassCatalog* record cannot be saved unless a valid *SubjectCategory* is selected from the list box.

ReqRank – If checked, a *People* record cannot be saved unless a valid *Rank* is selected from the list box.

ReqJob – If checked, a *People* record cannot be saved unless a valid *Job* is selected from the list box.

ReqGroup – If checked, a *People* record cannot be saved unless a valid *Group* is selected from the list box.

ReqDept – If checked, a *People* record cannot be saved unless a valid *Dept* is selected from the list box.

ReqDivision – If checked, a *People* record cannot be saved unless a valid *Division* is selected from the list box.

ReqClassify1 – If checked, a *People* record cannot be saved unless a valid *Classify1* value is selected from the list box.

ReqClassify2 – If selected, a *People* record cannot be saved unless a valid *Classify2* record is selected from the list box.

ReqClassify3 – If selected, a *People* record cannot be saved unless a valid *Classify3* record is selected from the list box.

Field Screen Names

NameEmplNum – Defines the screen name of the field initially labeled *EmplNum* on the *People* form.

NameAccountCode – Defines the screen name of the field initially labeled *AccountCode* on the *People* form.

NameClassify1 – Defines the screen name of the field initially labeled *Classify1* on the *People* form.

NameClassify2 – Defines the screen name of the field initially labeled Classify2 on the People form.

NameClassify3 – Defines the screen name of the field initially labeled Classify3 on the People form. *Note:* Renaming field screen names can cause confusion if SQL queries are used to find and retrieve records. The actual field name must be used in the SQL query.

Program Requirements

RequirementsAutoUpdate – If checked the ProgramRequirements table is automatically updated each time a change is made to the linking of a program to a class, the linking of a program to a person or the recording of completed training records.

It may be beneficial to turn this off when initially setting up program requirements for people and classes. A manual update can be performed with a selection on the [Tools] menu.

Web Module

DefaultAdminID – Receives enrollment requests if no training administrator has been defined on the ClassCatalog record. EnableSelfEnrollment must be unchecked for requests to be mailed.

Requests2Supervisor – If checked a student's first level supervisor will be sent a copy of the enrollment request made via the Web Module. EnableSelfEnrollment must be unchecked for requests to be mailed.

Requests2Administrator – If checked the training administrator as defined on the ClassCatalog record will receive a copy of the enrollment requests made via the Web Module. EnableSelfEnrollment must be unchecked for requests to be mailed.

Import Utility Rules

Use this form to select fields to be included and fields to be updated with the Built-in Import Utility. A separate document explains rules applied to each field during the import process. This task should be a joint effort between a training administrator and a technical person. File preparation and configuration of the import process is not designed for a non-technical person. A Custom Import Utility can be purchased if needed.

Detailed instructions for configuring and using the Built-in Import Utility can be found by selecting [Tools], [Import Utility], [Periodic Employee Data - People Table].

Software Registration Information

Use this form to make changes to your registration information. The CompanyName, CorpID, and RegNum can all be copied and pasted into this form to minimize possible typographical errors.

TrainingRegister® Change Tracking Option

When Change Tracking is enabled any change to the TrainingRegister® master database is logged with a few exceptions noted below. The date of the change, user id, table name, field name, old value, new value and an action indicating if the record was edited, deleted or added as a new record are all saved in the log.

Changes to all training data and all employee data and all permanent training records are tracked.

Data Security for Companies Regulated by FDA CFR Title 21, Part 11

No one can change data without a proper login ID and Password or a proper network login. Passwords in TrainingRegister® are encrypted so data exports will not display usable passwords. No two users can have the same ID and Password combination.

The database is protected with a strong password. If TrainingRegister® is used with a Jet database, no one will know the database password except the developer. If a SQL Server database is used then a strong password unique to the organization will be provided to the SQL Server Database Administrator.

If the Change Tracking Option is purchased, a letter identifying and authorizing the Database Administrator to receive the password will be required. By license, users of TrainingRegister® may not be provided write or change access to the SQL Server database outside TrainingRegister® tools.

Change Tracking Exceptions

Changes to the ProgramRequirements table are not logged. Changes linking a program to a class or a person are logged. Data in the ProgramRequirements table is computed from other data and is not directly edited by users.

If a ClassID is changed, the change to the ClassCatalog record is logged. This change is replicated in many other related tables. The ClassID change in the related tables is not logged.

If a person's ID is changed, the change to the People record is logged. This change is replicated in many other related tables. The ID change in the related tables is not logged.

Some actions such as importing employee data with the built-in import utility will record the last import date in the Setup table. Software upgrades also make note in the Setup table. These changes are not tracked.

If times or dates are changed for a scheduled class, the change to the ClassSchedule record are logged. These changes are replicated to enrollment and scheduling records for Rooms, Resources, Instructors and Students. Time and Date changes in the related tables are not tracked.

Security Settings

General

In the People Table, locate the person to whom you want to assign a right. Select the [Security] tab. Click [Edit] and check the appropriate rights/privileges and then click [Save]. "AllRights – Training Administrator" is number (2) on this page.

Automatic Login with Network Login Name

When first starting TrainingRegister® it will attempt to log you in with your Network Login Name or the name you used to login to your computer. This is also known as NTLM Authentication.

If TrainingRegister® can match your network login name with your record in the People table you will be logged in automatically. If two or more people have the same login name the login will fail with an explanation.

For this feature to function, the network login name must be entered in the appropriate field near the bottom of the Security tab on the People form. You can select [Who Am I?] from the [File] menu to see if TrainingRegister® recognizes you.

Be sure to Logout or Close TrainingRegister® to prevent other users from making database changes using your security settings.

Security Tab Descriptions

Pswd – This password along with the user's ID is required for manual login to the Administration or Web Module. By default, a user with no additional rights can see their own records and the training schedule when using the Web Module.

2) All Rights - Permits access to everything. Recommended only for one or two people.

3) *Access Security Tab* - Permits access to the [Security] tab on the People form.

4) *View All People* - Permits access to all People records via the Web Module. If checked, will disable Supervisor filtering.

5) *Add/Edit People* - Permits using the [Edit] and [New] buttons on the People form.

6) *Delete People* - Permits using the [Delete] button on the People form.

7) *View All Companies* - Permits using the [Find] button on the Companies form.

8) *Add/Edit Companies* - Permits using the [Edit] and [New] buttons on the Companies form.

9) *Delete Companies* - Permits using the [Delete] button on the Companies form.

- 10) *View All ClassCatalog* - Permits using the [Find] button on the ClassCatalog form.
- 11) *Add/Edit ClassCatalog* - Permits using the [Edit] and [New] buttons on the ClassCatalog form.
- 12) *Delete ClassCatalog* - Permits using the [Delete] button on the ClassCatalog form.
- 13) *View All ClassSchedule* - Permits using the [Find] button on the ClassSchedule form.
- 14) *Add/Edit ClassSchedule* - Permits using the [Edit] and [New] buttons on the ClassSchedule form.
- 15) *Delete ClassSchedule* - Permits using the [Delete] button on the ClassSchedule form.
- 16) *Add/Edit/Delete People Related List Boxes* - Permits access to the Relationships, Divisions, Departments, Groups, Jobs, Shifts, Ranks, Races, Classify1, Classify2 and Classify3 tables.
- 17) *Add/Edit/Delete Company Related List Boxes* - Permits access to the CompanyGroups table.
- 18) *Add/Edit/Delete ClassCatalog Related List Boxes* - Permits access to the DeliveryMethods, ClassGroupings and SubjectCategories tables.
- 19) *Add/Edit/Delete ClassSchedule Related List Boxes* - Permits access to the Resources, Rooms and Reasons tables.
- 20) *Add/Edit/Delete Required Training Related List Boxes* - Permits access to the Programs and LicenseTypes tables.
- 21) *Add/Edit/Delete Skill Tracking Related List Boxes* - Permits access to the Skills and SkillLevels tables.
- 22) *Add/Edit/Delete Accounting Related List Boxes* - Permits access to the AccountCodes tables.
- 23) *Add/Edit/Delete Training Records* - Permits access to the TrainingRecords table and [Edit TrainingRecords] button on [Tasks] tab of People form. This does not control linking of people to classes, enrollment or posting enrollment records.
- 24) *Edit Software Settings and Options* - Permits access to all Configuration Tables listed under Global Options.
- 25) *Access Import Utility* - Permits access to Built-in Import Utility on [Tools] menu.

- 26) *Export Data* - Permits using Export Data features on [Tools] menu.
- 27) *System Administrator Options* - Permits accessing System Administrator Options on the [Tools] menu.
- 28) *Permit Use of Create/Send Message Form* - Permits access to the Messaging form.
- 29) *Permit Enrolling People* - Permits user to enroll people for scheduled training.
- 30) *Permit Dropping People* - Permits user to drop people from scheduled training.

Appendix A - Definitions

AccountCode – Optional method of classifying people and their training records. Maintained for compatibility with legacy data.

CEU – Continuing Education Unit. Earned credits toward a license or certification. Can be different than Hours. The value earned can be defined for each License Type.

Change Tracking – This add-on feature tracks changes to the database. The login user id, date, table name, field reference, old value, new value and whether the record was edited, new or deleted are saved.

Class – Any training, learning experience or lesson. The smallest portion of training that is tracked. Can be WBT, CBT, OJT, Self Taught or Instructor led. Permanent information about a class is entered one time and is saved in the ClassCatalog table.

ClassGrouping – Optional method of classifying training. Scheduled classes can be grouped by this classification on the web module. The ClassGroupings table contains the definitions.

ClassID – User defined database key for the ClassCatalog table. Each record must have a unique ClassID.

Companies – Name of a TrainingRegister® table, which can contain training providers, room providers, licensing agencies, resource providers, etc. If a multi-company license is purchased then individuals in the People table and their training records can be classified with a company from the Companies table.

DeliveryMethod – Optional method of classifying training. Example: Instructor led, WBT, Self-Taught, On Job Training, Video, etc. The DeliveryMethods table contains the definitions.

DepartmentID – Optional method of classifying people and their training records, and is used in report selection. The Departments table contains the name of the department and a link to the department level supervisor.

DivisionID – Optional method of classifying people and their training records, and is used in report selection. The Divisions table contains the name of the division and a link to the division level supervisor.

EmplNum – Optional place to store an employee number. In most cases the employee number is used as the person's ID and this field is not used.

GroupID – Optional method of classifying people and their training records, and is used in report selection. The Groups table contains the name of the group and a link to the group level supervisor.

HireDate – Optional place to save an employment date.

Hours – The estimated or actual time required to receive training.

Inactive People – Can be excluded when searching for a person using the [Find] button on the People form. When a person is classified as inactive, all their program requirements are deleted. This keeps them off reports that indicate they need required training. Their link to training programs remains. If the person is reclassified as active in the future their program requirement records will be reconstructed.

JobID – Optional method of classifying people and their training records, and is used in report selection. The Jobs table contains the name of the job.

List Box – An entry box, which limits user selection to predefined choices. Most all list boxes in TrainingRegister® are definable by the training administrator or a user with sufficient user rights. A list box permits setting company policy for how training, people, etc. will be classified.

People – Name of a TrainingRegister® table, which can contain employees, students, instructors, training administrators and contacts for records in the Companies table.

ProviderID – Optional method of classifying training with a company or school. Providers are saved in the Companies table.

RankID – Optional method of classifying people and their training records, and is used in report selection. The Ranks table contains the name of the rank.

Relationship – Optional method of classifying people, and is used in report selection. The Relationship table contains the relationship definitions.

Revision – Optional method of classifying training (or document) with a revision identification. A new ClassCatalog record should be created for each new revision. A replication feature is provided for this purpose.

Scheduled Class – A scheduled instance of a Class from the ClassCatalog table. Classes can be scheduled many times. Scheduled Classes are saved in the ClassSchedule table.

Shift – Optional method of classifying people, and is used in report selection. The Shifts table contains the shift definitions.

SubjectCategoryID – Optional method of classifying training. Scheduled classes can be grouped by this classification on the web module. Names of people who have received any training for a specific SubjectCategoryID can be retrieved. The SubjectCategories table contains the names of each subject.

TermDate – Optional place to save a termination date.

Training Program – Also known as a course, track, path or curricula. In TrainingRegister®, a Training Program is a group of one or more classes in the ClassCatalog table which are required by a group of one or more individuals in the People table.

Appendix B - Tab and Field Descriptions For Tables

People Table Tabs and Field Descriptions

Use only the fields needed to accomplish the tasks and reports desired.

General Tab

ID: **Required.** Enter an Employee Number, Badge Number, or SSN to uniquely identify the person. If the TrainingRegister® Import Utility is used, this number must match the number used in the HR or payroll system. Also, fake numbers should not be used if the import utility is used.

First: **Required.** Enter a first name or first initial and middle name as appropriate.

Mi: Can be use to enter a middle initial.

Last: **Required.** Enter a last name.

Inactive: Check this box to keep the person from appearing in most reports. When a person is classified as inactive, all their program requirements are deleted. This keeps them off reports that indicate they need required training. Their link to training programs remains. If the person is reclassified as active in the future their program requirement records will be reconstructed. NOTE: The import utility can mark this automatically.

Instructor: Check this box if the person is an instructor. This places them on a master list of instructors.

Administrator: Check this box if the person is a training administrator who will “own” one or more classes and will receive web based enrollment requests. Be sure to also record an email address.

Supervisor: Check this box to if the person is a supervisor. Divisions, Departments and Groups can be classified with a supervisor.

Immediate Supervisor: This field will display the current person’s immediate supervisor. This field will be left blank if no supervisor has been specified or if the person is marked as a supervisor.

Position: Can be used to enter a text description of job title or position. Generally, skip this field and use the Job field to classify the employee.

DivisionID: Can be used to classify a division from the list box. This value will be saved with the training records of this employee. Normally, a change will only affect future training records.

DeptID: Can be used to classify a department from the list box. This value will be saved with the training records of this employee. Normally, a change will only affect future training records.

GroupID: Can be used to classify a group from the list box. This value will be saved with the training records of this employee. Normally, a change will only affect future training records.

JobID: Can be used to classify a job from the list box. This value will be saved with the training records of this employee. Normally, a change will only affect future training records.

RankID: Can be used to classify a rank from the list box. Choices are added from the [Tables] menu. This value will be saved with the training records of this employee. Normally, a change will only affect future training records.

Relationship: Can be used to specify a relationship from the list box. This is where you can define the person's relationship to your company, i.e. Employee, Student, Instructor, etc.

Shift: Can be used to specify a shift from the list box. Choices are added from the [Tables] menu.

EmplNum: Generally skip this field and use the Employee Number as the ID. Enter an Employee Number if not used for the ID and it is needed. The label for this field can be modified for custom usage or marked "N/A" if not used.

AccountCode: Generally skip this field. This field has been retained for compatibility with legacy client data.

HireDate: Can be used to enter the hire date for the employee. The number for the right of this field indicates the number of years the person has been employed. This number will only be displayed if a date has been entered in the HireDate field.

TermDate: Can be used to enter the termination date for the employee.

Contact Tab

Company: This field has been retained for compatibility with legacy client data. If multi-company license has been purchased, skip this field and use the drop-down list box titled *CompanyID* at the top of the Contact Tab to classify people by their companies.

Address, MailStop, City, StateProvince, PostalCode, Country: Enter as needed or desired for mailing address.

BusPhone, Ext: Can be used to enter business phone and extension.

HomePhone: Can be used to enter a home phone.

Mobile: Can be used to enter a cell or digital phone number.

Fax: Can be used to enter a fax number.

Pager: Can be used to enter a pager number.

E_Mail: Can be used to enter an email address.

Misc Tab

Classify1: Can be used for customized classifications. Enter a selection from the list box. The label for this field can be modified for custom usage or marked “N/A” if not used.

Classify2: Can be used for customized classifications. Enter a selection from the list box. The label for this field can be modified for custom usage or marked “N/A” if not used.

Classify3: Can be used for customized classifications. Enter a selection from the list box. The label for this field can be modified for custom usage or marked “N/A” if not used.

Misc: Accepts 60 characters.

DOB: Can be used to enter a date of birth. Recorded with the history for affirmative action reporting and sometimes used with license tracking.

Gender: Can be used to enter “M”, “F” or “U”. Recorded with the history for affirmative action reporting.

Race: Can be used to select a race from the list box. Recorded with the history for affirmative action reporting.

PreferredReportLanguage: The default language is English. If Spanish is selected, a few reports will be displayed in Spanish, i.e. the confirmation letter.

NewRecord: Displays date of record creation.

Updated: Displays date record was last saved.

Notes Tab

Notes: Can be used to enter general comments about the employee. Text can be prepared and spell checked in a word processor and then pasted in this field by using CTRL+V or [Edit], [Paste].

Dev Plan Tab

Dev Plan: Can be used to enter comments about the employee's personal development plan. Text can be prepared and spell checked in a word processor and then pasted in this field by using CTRL+V or [Edit], [Paste].

Security Tab

The security tab is where the security settings for an individual may be found. A user's password can be reset from this tab. A network login name can also be defined in the NTML_UserName field. See the section "Security Settings" for a description of each security setting.

Reports Tab

The Reports tab is where some of the reports for the current person are located. All Reports can be found under the Reports Menu at the top of Training Register.

Tasks Tab

The Tasks tab is where functions for the current person can be performed.

Companies Table Tabs and Field Descriptions

Use only the fields needed to accomplish the tasks and reports desired.

General Tab

CompanyID: **Required.** Enter a number to uniquely identify the company.

CompanyName: **Required.** Enter the name of the company.

CompanyGroup: Can be used to classify company records.

ClientCompany: Reserved for future use.

RoomProvider: Place a check in this box if this company provides rooms for the classes offered in the class catalog. Records in the rooms table can be classified with a room provider.

ResourceProvider: Place a check in this box if this company provides resources for the classes offered in the class catalog. Records in the resource table can be classified with a resource provider.

SupportProvider: Reserved for future use.

LicensingAuthority: Reserved for future use.

TrainingProvider: Place a check in this box if this company provides training for people in your database. Records in the ClassCatalog table can be classified with a provider.

Website: Can be used to enter the companies website address.

City, StateProvince: Information from these fields may be used to specify company location in some reports.

Notes Tab

Notes: Can be used to enter general comments about the company. Text can be prepared and spell checked in a word processor and then pasted in this field by using CTRL+V or [Edit], [Paste].

Reports Tab

The Reports tab is where some of the reports for the current company are located. All Reports can be found under the Reports Menu at the top of Training Register.

Tasks Tab

The Tasks tab is where functions for the current company can be performed.

ClassCatalog Tabs and Field Descriptions

The ClassID field is designed to accept a unique user defined alphanumeric identifier for each training class. The ClassID should not be changed after the class record has been scheduled or used for historical records. The ClassID is replicated into the training history and scheduling tables. The ClassID is the database key for the ClassCatalog and cannot be modified.

By default, the ClassID cannot be modified. This recommended setting can be changed in the System Administrator Options.

General Tab

Title: **Required.** Enter a descriptive name for the training.

Revision: Can be used for ISO document revision identifier. This field should not be changed. Instead, replicate the class record and give the new class record a different revision identifier.

Hours: **Required.** Enter the actual number of clock hours for the training. Decimals are accepted.

CEU: Can be used to enter the number of continuing education units or re-licensing credits. Decimals are accepted.

Days: Can be used to enter the number of days of the duration of the class.

Delivery Method: Can be used to select the method of delivery for the class.

Class Grouping: Can be used to select a class grouping. This is an optional method of classifying training. Scheduled classes can be grouped by this classification on the web module. The ClassGroupings table contains the definitions.

Subject Category ID: Can be used to select a subject category ID. This is an optional method of classifying training. Scheduled classes can be grouped by this classification on the web module. Names of people who have received any training for a specific SubjectCategoryID can be retrieved. The SubjectCategories table contains the names of each subject.

Provider ID: Can be used to select a provider ID. This is an optional method of classifying training with a company or school. Providers are saved in the Companies table.

Cost: Value only used if training records are created by directly linking people to this class and the enrollment process is bypassed. This value should be the actual cost per student and not the total class cost.

Inactive: Can be used to enter the date the class is no longer offered or is obsolete. Class records should never be deleted as that would delete the permanent historical training records of all participants.

Description Tab

Description: Can be used to enter a brief description, abstract and/or prerequisites. The entry should be valid for all scheduled offerings of this class and not contain scheduling data. Because this text will need to wrap differently in different reports and browser settings, please enter only plain text without formatting. Text can be prepared and spell checked in a word processor and then pasted in this field.

Misc Tab

InstructorID: This field is used only for recording old historical training when it is necessary to document the instructor. The instructor's ID will be recorded in the history file when bypassing the scheduling procedures and linking people directly to a class. In most cases, this field will not be used.

AdministratorID: Can be used to select a training administrator who will "own" this class and receive web based enrollment requests. The list box displays the employee records that are classified as Administrator with a check box.

Interactive Tab

ConfirmationHeader: Can be used to customize the Enrollment Confirmation Letter and can be entered in the corresponding boxes for either English or Spanish.

ConfirmationFooter: Can be used to customize the Enrollment Confirmation Letter and can be entered in the corresponding boxes for either English or Spanish.

Reports Tab

The Reports tab is where some of the reports for the class are located. All Reports can be found under the Reports Menu at the top of Training Register.

Tasks Tab

The Tasks tab is where functions for the class can be performed.

ClassSchedule Tabs and Field Descriptions

General Tab

ProviderID: The default provider, as defined in the Class Catalog, will appear in this field. Change only if the provider for this scheduled instance is not the same as the regular provider listed in the ClassCatalog.

ClassBegin: **Required.** Enter a beginning date and time for the class.

ClassEnd: **Required.** Enter an ending date and time for the class.

StudentMin: Can be used to enter the minimum number of students needed for the class. This can be used in making the decision for canceling a class.

StudentMax: Can be used to enter the maximum number of students allowable for the class. The number of enrollments are limited to this value.

CancelDate: If a date is entered, students are requested to drop the class on or before this date.

DisplayOnWeb Feature: When checked, the TrainingRegister® Web Module can display this class with other scheduled classes.

Logistics Tab

Logistics: Can be used to record information for Training Administrator, Coordinator, or Instructor use. This information is not displayed on the class schedule for student viewing.

Misc Tab

FYI Only: Except for the ClassScheduleID, these values are inherited from the ClassCatalog at the time the class is scheduled and provide different ways of searching and sorting scheduled classes. Some field values are inherited by the training records that are created when enrolling a person.

ClassGrouping: Used to group, sort and filter Scheduled Classes on the Web Module.

Tuition: Currently, Tuition is printed on the confirmation letter if so configured. TrainingRegister® does not contain revenue tracking or billing features at this time. These features might be available for added cost in the future.

Reports Tab

The Reports tab is where some of the reports for the current class are located. All Reports can be found under the Reports Menu at the top of Training Register.

Tasks Tab

The Tasks tab is where functions for the current class can be performed.

Appendix C - Reports

People Related Reports

List of People

Produces a Report displaying a list of people based on the search criteria given.

List of Supervisors

Produces a Report displaying a list of supervisors based on the search criteria given.

List of Training Administrators

Produces a Report displaying a list of training administrators based on the search criteria given.

List of Instructors

Produces a Report displaying a list of instructors based on the search criteria given.

Schedule for a Selected Person – Simple

Produces a report only based on BeginDate, EndDate, and Class Description and shows all the classes a selected individual is scheduled to attend or instruct.

Schedule for a Selected Person – with Detail

Produces a report based on the search criteria given that shows all the classes a selected individual is scheduled to attend or instruct.

Training Records for a Selected Person

Produces a report based on the search criteria given that shows completed classes and classes a person is enrolled for or instructing.

Training Records for a Selected Person by SubjectCategory

Produces a report based on the search criteria given that shows completed classes and classes a person is enrolled for or instructing sorted by SubjectCategory.

Training Records for a Selected Person by ClassGrouping

Produces a report based on the search criteria given that shows completed classes and classes a person is enrolled for or instructing sorted by ClassGrouping.

Training Records for a Selected Person by Delivery Method

Produces a report based on the search criteria given that shows completed classes and classes a person is enrolled for or instructing sorted by DeliveryMethod.

Training Program Requirements for a Selected Person – with Detail

Produces a report based on the search criteria given that shows all the required classes for all of the programs a selected person is linked to. The report also contains information regarding TargetDate, date completed, the interval that the class is needed, and when the required class is next due.

Training Program Requirements for a Selected Person – Summary

Produces a report based on the search criteria given that shows only the needed required classes for all of the programs a selected person is linked to. The report also contains information regarding TargetDate, date completed, the interval that the class is needed, and when the required class is next due.

Duplicate Confirmation Letter for a Selected Person

Produces a report based on the search criteria given that duplicates the confirmation letter that was generated when a student is enrolled in a scheduled class.

List of Skills for a Selected Person

Produces a report based on the search criteria given that shows all the skills a selected person is linked to.

Missed Training for a Selected Person

Produces a report based on the search criteria given that shows the classes a selected person has missed or dropped, the date of the class, and the reason why the class was missed.

Completion Certificates Merge File for a Selected Person and Class

Produces a merge file that can be used with a word processor to create Completion Certificates to your own specification and design. This particular merge file will be created from one training record for a specific person. It is useful to produce a single Completion Certificate.

ClassCatalog Related Reports

Class Catalog – List of Selected Training / Classes

Produces a report that shows a list of training and classes based on the search criteria given.

Master List of Instructors

Produces a report based on the search criteria given that shows a master list of people who are designated instructors.

Master List of Instructors with Classes

Produces a report based on the search criteria given that shows a master list of instructors along with the classes they are qualified to teach.

Scheduled Dates / Times for a Selected Class

Produces a report based on the search criteria given that shows the dates and times a selected class is scheduled.

Waitlist for a Selected Class

Produces a report based on the search criteria given that shows a prioritized list of people who are is on a waitlist for a selected class.

Linked Prerequisites for Selected Class

Produces a report based on the search criteria given that shows the linked prerequisites for a selected class.

List of Classes with Prerequisites

Produces a report based on the search criteria given that shows the a list of classes with prerequisites.

Completed Training / Historical Roster for a Selected Class

Produces a report based on the search criteria given that shows who all has completed a selected class and the date which it was completed.

Historical Class Dates for a Selected Class

Produces a report based on the search criteria given that shows dates a selected class has been given.

Qualified Instructors for a Selected Class

Produces a report based on the search criteria given that shows the people who have been designated qualified instructors for a selected class.

Missed Training for a Selected Class

Produces a report based on the search criteria given that shows who has missed or dropped a selected class, the date of the missed class, and the reason why the class was missed.

Completion Certificates Merge File for Selected Class

Produces a merge file that can be used with a word processor to create Completion Certificates to your own specification and design. This particular merge file will be created from one training record for a specific person. It is useful to produce Completion Certificates for a roster of people who completed the training on the same day.

ClassSchedule Related Reports

Scheduled Classes – List

Produces a report based on the search criteria given that shows scheduled training.

Training Calendar

Produces a Calendar based on the search criteria given that shows scheduled training for a selected amount of time. The report can be filtered for a ClassGrouping, Provider, SubjectCategory, or a specific class.

Enrollment Roster / Custom Sign In Sheet

Produces a report that shows who all is enrolled in a selected class which can also be used as a sign in sheet.

Class Expense / Cost Summary

Produces a report that shows credits and debits associated with a selected class.

Scheduled Class Details

Produces a report based on search criteria given that shows information regarding a scheduled class.

Duplicate Confirmation Letter

Produces a report based on the search criteria given that duplicates the confirmation letter that was generated when a student is enrolled in a scheduled class.

Completion Certificates Merge File for Selected Scheduled Class

Produces a merge file that can be used with a word processor to create Completion Certificates to your own specification and design. This particular merge file will be created from one training record for a specific person. It is useful to produce Completion Certificates for a roster of people who are enrolled in the same scheduled class and will be completing training on the same day. Because the training has not yet been completed, the merge data will not contain a value for hours or a completion date.

Required / Needed Training Related Reports

All Required Classes

Produces a report based on the search criteria given that shows a list of all classes that are designated “required”.

All Required Classes Grouped by Training Program

Produces a report based on the search criteria given that shows a list of all classes that are designated “required” and sorts them by training program.

Required Classes for a Selected Program

Produces a report based on the search criteria given that shows a list of classes that are designated “required” for a selected program.

People Linked to a Selected Program

Produces a report based on the search criteria given that shows a list of people that are linked to a selected program.

Needed Classes – Prioritized List

Produces a report based on the search criteria given that shows a list of the classes that people need and sorts them by how many people need the class.

People who need a Selected Class

Produces a report based on the search criteria given that shows the people who need a selected class.

Linked Programs for a Selected Class

Produces a report based on the search criteria given that shows the programs to which a selected class is linked.

Requirements / Needs for a Selected Person

Produces a report based on the search criteria given that shows all the required classes for all of the programs a selected person is linked to. The report also contains information regarding TargetDate, date completed, the interval that the class is needed, and when the required class is next due.

Requirements / Needs for a Selected Person – Summary

Produces a report based on the search criteria given that shows only the needed required classes for all of the programs a selected person is linked to. The report also contains information regarding TargetDate, date completed, the interval that the class is needed, and when the required class is next due.

Delinquency Report – Summarized by Division

Produces a report based on the search criteria showing summarized delinquency statistics categorized by divisions.

Delinquency Report – Summarized by Department

Produces a report based on the search criteria showing summarized delinquency statistics categorized by departments.

Delinquency Report – Summarized by Group

Produces a report based on the search criteria showing summarized delinquency statistics categorized by groups.

Delinquency Report – Grouped by Division

Produces a report based on the search criteria showing complete delinquency statistics grouped by divisions.

Delinquency Report – Grouped by Department

Produces a report based on the search criteria showing complete delinquency statistics grouped by departments.

Delinquency Report – Grouped by Employee Group

Produces a report based on the search criteria showing complete delinquency statistics grouped by employee groups.

Skill Tracking Reports

People with a Specific Skill

Produces a report based on the search criteria given that shows the people who are linked to a specific skill.

Skills for a Selected Person

Produces a report based on the search criteria given that shows all the skills to which a selected person is linked.

List Boxes – Contents of

From the [Reports] menu, a person can produce a report that shows what all is in a specific list box. To actually modify the list box, go to [Tables], then choose [List Box tables] and then choose the list box you want to modify.

People Related List Boxes

Relationships

Divisions

Departments

EmployeeGroups

Jobs

Shifts

Ranks

Races

Classify1

Classify2

Classify3

Supervisors

Training Administrators

Instructors – Master List

Company Related List Boxes

CompanyGroups

ClassCatalog Related List Boxes

DeliveryMethods

ClassGroupings

SubjectCategories

Providers

ClassSchedule Related List Boxes

Resources

Rooms

Reasons

Required Training Related List Boxes

Programs - (Training Programs)

Skill Tracking Related List Boxes

Skills

Skill Levels

Accounting Related List Boxes

AccountNumbers – Chart of Accounts

Training Records – Other

Training Records – All Classes, Selected People, Date Range

The purpose of this report is to provide a method of extracting selected training records from the database. Data displayed in the table can be copied to the Windows clipboard and then pasted into an empty Excel spreadsheet.

Training Records – Tagged Classes, All People, Date Range

The purpose of this report is to provide a method of extracting selected training records from the database. Data displayed in the table can be copied to the Windows clipboard and then pasted into an empty Excel spreadsheet.

Training Records – All Classes, Tagged People, Date Range

The purpose of this report is to provide a method of extracting selected training records from the database. Data displayed in the table can be copied to the Windows clipboard and then pasted into an empty Excel spreadsheet.

Security Reports

Login Users by Rights

This report includes only people who have one or more check boxes checked on their Security tab. These are the training administrators, training coordinators and maybe supervisors who will be using the Administration Module. The Administration Module is not designed for students. The Web Module is designed for students. It also makes use of some of the check boxes on the Security tab to grant additional rights to supervisors. See the documentation for details because not all of the check boxes will affect the Web Module functionality. The default level of security (no check boxes checked) will permit a person (student) to see their own records and requirements, and access the list of scheduled training when using the Web Module.

Appendix D – List Boxes

People Related List Boxes

Relationships

Use this form to define Relationships for use in classifying individuals in the People table. Relationships can help separate Employees, Vendors, Students, Clients, etc.

Divisions

Use this form to define Divisions for use in classifying employees in the People table. If a person is classified with a Division at the time they receive training, the Division classification will be saved in their training records. The Division is also a way to link a supervisor to his/her employees. A filter can be used to permit a supervisor to see only the records of his/her employees.

Departments

Use this form to define Departments for use in classifying employees in the People table. If a person is classified with a Department at the time they receive training, the department classification will be saved in their training records. The Department is also a way to link a supervisor to his/her employees. A filter can be used to permit a supervisor to see only the records of his/her employees. You can also designate a parent Division to the specific Department. A department name and ID are required when defining a new department.

Groups

Use this form to define Groups for use in classifying employees in the People table. If a person is classified with a group at the time they receive training, the group classification will be saved in their training records. The group is also a way to link a supervisor to his/her employees. A filter can be used to permit a supervisor to see only the records of his/her employees. You can also designate a parent division to the specific department.

Jobs

Use this form to define Jobs for use in classifying employees in the People table. If a person is classified with a job at the time they receive training, the job classification will be saved in their training records.

Shifts

Use this form to define Shifts for classification of employees in the People table. Shifts can be used in searching the People table.

Ranks

Use this form to define Ranks for use in classifying employees in the People table. If a person is classified with a Rank at the time they receive training, the rank classification will be saved in their training records.

Races

Use this form to define Races that can be used to classify individuals in the People table. If a person is classified with a Race at the time they receive training, the race classification will be saved in their training records. We recommend that you only use this classification if you are required to produce affirmative action data from your training records. Sex and age classifications are also provided if needed for the same purpose.

Classify1, Classify2, Classify3

Use these forms to build a user defined classification for People when no other classification is suited to the need. These three are provided in list box format. It may be a good idea to discuss special needs with the vendor.

Supervisors

See the people Table. A person is classified as a Supervisor by checking the Supervisor checkbox on his/her record. A report listing all Supervisors is available on the Reports Menu.

Training Administrators

See the people Table. A person is classified as a Training Administrator by checking the Training Administrator checkbox on his/her record. A report listing all Training Administrators is available on the Reports Menu.

Instructors

See the people Table. A person is classified as an instructor by checking the Instructor checkbox on his/her record. A report listing all instructors is available on the Reports Menu.

Company Related List Boxes

CompanyGroups

Use this form to define classifications for Company Records in the Companies tables.

ClassCatalog Related List Boxes

DeliveryMethods

Use this form to define training delivery methods such as CBT, Video, Instructor Led, Self-Study, etc. Classes in the ClassCatalog table can be classified with a Delivery Method. This classification is also saved in the training records of those who receive the training.

ClassGroupings

Use ClassGroupings to classify records in the ClassCatalog table. Then scheduled training and historical training can be reported and/or grouped by ClassGrouping. SubjectCategory is used in the same way.

SubjectCategories

Use SubjectCategories to classify records in the ClassCatalog table. Then scheduled training and historical training can be reported and/or grouped by SubjectCategory. ClassGrouping is used in the same way. The TrainingRecords table can also be searched for people who have received specific subjects or knowledge.

Providers

See the Companies Table. A company or an organization is classified as Training Provider by checking the checkbox on the company's record. A report listing all Providers is available on the Reports menu. One Provider can be designated the Default Provider in the Global Options section in the Configuration Tables. That provider will then be used each time a new record in the ClassCatalog is created.

ClassSchedule Related List Boxes

Resources

Use this form to build an inventory of Resources that can be scheduled with scheduled training.

Rooms

Use this form to build an inventory of training Rooms. These can be internal and/or external. These are only needed if you want to schedule the room with training and/or you want the confirmation letters and individual training schedules to display the room and directions.

Reasons (for dropping class)

Use this form to build a list of potential reasons a student would drop a class. When a student is dropped from a scheduled class, the user will be prompted to select a Reason from a list box.

Required Training Related List boxes

Programs

Training Programs are used to define required training. A training program is similar to a track, path, or curricula. Use this form to define Training Program names. Later, Programs will be linked to both people and classes to define who is required to receive specific training.

Skill Tracking Related List Boxes

Skills

Use this form to create Skills, which can be linked to individuals in the People table. TrainingRegister® does not relate skills to training. Skills are an independent method of classifying people. A person could be linked to a skill after completing training and/or demonstrating proficiency. A report provides an easy method of searching for people who have a specific skill.

Skill Levels

Use this form to create Skill Levels, such as novice, expert, apprentice, level1, and level2. These can be used when linking a person to a Skill. The Skill Level is an alphanumeric field.

Accounting Related List Boxes

AccountNumbers

Use this form to build a list of Account Numbers (Chart of Accounts) and associated descriptions. AccountNumbers will be selected from a drop-down list box and are required when recording financial transactions.