



# Users Manual

**Core Business Solutions, Inc.**  
8020 W Fairview Avenue  
Littleton, CO 80128  
[www.thecoresolution.com](http://www.thecoresolution.com)

Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.

---

## Table of Contents

Introduction to TrainingTrack 2000.....	3
Control Panel .....	4
Basic Form Input Instructions .....	5
Employee Setup Manager.....	6
Course Setup Manager .....	7
Class Schedule Manager .....	9
Class Schedule Report .....	11
Trainer Scheduling Report .....	12
Employee Report .....	13
Export Raw Database Records .....	14
Compatibility .....	15
Technical Help .....	15

## Introduction to TrainingTrack 2000 Training Schedule Management Software



TrainingTrack 2000 makes it easy to create, schedule, manage and report on training records in one simple and powerful application. TrainingTrack 2000 can be up and running in seconds, giving you instant control over the tedious job of training management. No other training management software package is as powerful or easy to use as TrainingTrack 2000.

Simple data entry and bulk uploading features allow users to become immediately productive and stay easily up-to-date. Data entry in TrainingTrack 2000 is completely form driven, so there are no new special commands or database tricks to learn. Knowing how to point-and-click is all that's necessary.

Database changes are immediately accessible and updated on easy-to-understand report screens. If you need to export data from the database for custom report generation or import into another program, TrainingTrack 2000 comes with flexible and powerful record exporting features.

Because TrainingTrack 2000 is Microsoft® Excel based, there is no need to import data from other complex database applications to use all of Excel's built-in sorting, formatting and charting capability. Isn't Excel where most of your data ends up anyway?

TrainingTrack 2000 is fully ISO9001:2000 compliant, including support for the new requirements of training effectiveness tracking.

TrainingTrack 2000 simplifies your life.

## Control Panel

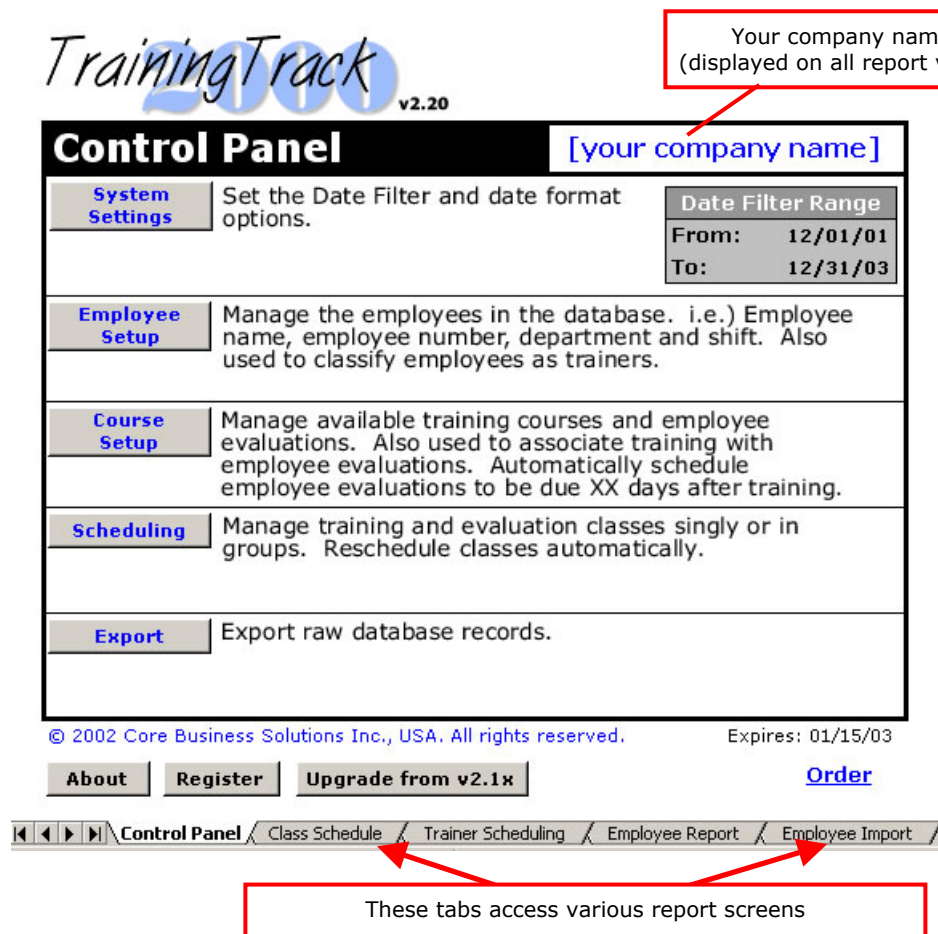
The [Control Panel](#) is the starting point for all database management and input activities. From this panel you can add, delete, edit, export and assign relationships to all records in the database. The controls are ordered (from top to bottom) in roughly the order that you will enter data. The controls nearer to the bottom of this panel depend upon completed inputs from those near the top.

The [System Settings](#) control is used to set the system *date formats* and the Date Filter Range for all input screens and reports. The Date Filter Range narrows or widens the dates that are displayed on all of the input screens and reports. Note that setting this date range has no effect on scheduling classes for dates outside the selected range. This function only effects what is currently displayed.

The controls [Employee Setup](#) and [Course Setup](#) must be completed first and generally require only periodic maintenance thereafter. Use the [Employee Import](#) tab for bulk importing of large employee lists.

The [Scheduling](#) control is used to schedule training and evaluations as they occur. This control will be the most frequently used data input screen.

The [Export](#) control is used to export filtered or unfiltered raw database records for use in other situations. The output of the export function is an unformatted Excel spreadsheet with the desired raw database records.



## Basic Form Input Instructions

The following instructions generally apply to all of the input forms accessed from the [Control Panel](#). The [Class Manager](#) is being used here as an example.

**Class Manager**

Training | Evaluations | ☒ Open ☐ Closed ☐ All

Date Range: 01/01/02 to 12/31/02

**TRAINING CLASSES**

21-123-1	Basic Measurements	11/11/02	Holley	Robert G
01-005-8	Blueprint Class B	08/16/02	Holley	Robert G
02-356-1	Customer Satisfaction	09/09/02	Cash	David

**CLASS DATA**

Number: 01-005-8 Title: Blueprint Class B

Location: Classroom 2a

Hyperlink:

Planned Date: 08/16/02 Planned Time: 9:00 AM Actual Date:

**COURSES**

- 02-342 Basics of Measuremen
- 03-566 Confined Space
- 02-332 D. O. T., Hazardous
- 01-256 Fiber-Optics
- 03-256 Fire Prevention
- 03-587 Injury Prevention
- 01-980 In-Process Quality
- 04-002 ISO 9000 Orientati
- 01-005 Reading Blueprints

**TRAINERS**

04855	Cash	David
04158	Holley	Robert G

**CLASS LIST**

04091	Alvey	Sandra C
00879	Anderson	Don B
04820	Bonner	Joseph I
04855	Cash	David
04477	Cruz	Jose L
01079	Estes	Edward
00031	Hirsch	Gary P
04158	Holley	Robert G
01153	Hosking	Dawn K

Save New Delete ☒ Auto-Schedule Close

### New Records

1. In order to create a new record, press **New**. A new record will be created and automatically assigned temporary values. These values can be changed at any time.
2. If the new record is not selected (highlighted) - select it.
3. Make any necessary changes to the text input fields, date fields, check boxes or list boxes.
4. Press **Save**.

### Edit Existing Records

1. If the record that you want to change is not selected (highlighted) - select it.
2. Make any necessary changes to the text input fields, date fields, check boxes or list boxes.
3. Press **Save**.

**Note:** If you have not made any changes to a record, the **Save** button will not be enabled.

### Delete Existing Records

1. If the record that you want to delete is not selected (highlighted) - select it.
2. Press **Delete**.
3. You will be asked to confirm the deletion of the record. Press **OK** if you want to continue or **Cancel** to abort.

## Close the Form

1. Press **Close**.

## Employee Setup Manager

The [Employee Setup Manager](#) is used to create and manage basic employee data. This screen is also used to indicate which employees are trainers.

The screenshot shows the 'Employee Manager' window. On the left is a table titled 'EMPLOYEE LIST' with columns for ID, Last Name, First Name, and a Trainer checkbox. The row for '04820 Bonner Joseph I.' is selected. On the right is a form with fields for NAME (Last: Bonner, First: Joseph I.), NUMBER (04820), LOCATION (Denver), DEPARTMENT (Quality), SHIFT (1), and a TRAINER checkbox (unchecked). A REMARKS field contains 'Training Needs: Safety'. At the bottom are buttons for Save, New, Delete, and Close.

ID	Last	First	Trainer
04091	Alvey	Sandra D.	
00879	Anderson	Don B	
04820	Bonner	Joseph I.	
04855	Cash	David	T
04477	Cruz	Jose L	
01079	Estes	Edward	
00031	Hirsch	Gary P	
04158	Holley	Robert G	T
01153	Hosking	Dawn K	
01327	Jarrell	Ronald L	
01153	Jaso	Daniel V	
00879	Oranday	Carol	
00031	Phan	Jimmy E	

## SETTING UP EMPLOYEES AND TRAINERS

1. From the [Control Panel](#), click on the [Employee Setup](#) button.
2. New employees can be added by clicking the **New** button.
  - a. A "New Employee" record will be automatically created.
  - b. Edit the employee information on the right side of the input screen.
  - c. Click the **Trainer** checkbox if the person will be a trainer or evaluator.
  - d. Click **Save**.
3. To edit an existing employee, simply select his/her name, edit the information and click **Save**.
4. Click **Close** when done.

**Note:** All input fields are optional. However, use of a last name is recommended for some of the report displays.

## Course Setup Manager

The [Course Setup Manager](#) is used to create and manage your list of all possible training courses and evaluations (testing, certifications, etc.). When you schedule classes (with the [Scheduling Manager](#)) they will be based on the information you input into the [Course Manager](#) form.

### Definitions

**Training course** - The primary record that defines all default information for scheduled training.

**Evaluation** - The setup record that defines all default information for scheduled evaluations. An evaluation is optional. *Being evaluated* may require some form of testing in order to show subject matter understanding, compliance or certification.

Evaluations differ from training courses in that employees may be trained on a task without necessarily being evaluated (certified) to perform the task.

Training and evaluations may occur only once or may require re-training or re-evaluation at some regularly scheduled frequency. In the latter case, the training and evaluation will be valid for a limited time period (i.e. 12 months) before re-training or re-testing is required.

The [Course Manager](#) form is used to manage this basic information.

The screenshot shows the 'Course Manager' window with two tabs: 'Training' and 'Evaluations'. The 'Training' tab is active, displaying a list of training courses. The 'Evaluations' tab is also visible, showing a list of evaluations. Below the lists are input fields for 'NUMBER', 'TITLE', and 'HYPERLINK'. There are also radio buttons for 'Once' and 'Periodic' scheduling. At the bottom are buttons for 'Save', 'New', 'Delete', and 'Close'. Red callout boxes provide additional instructions: one points to the 'Evaluations' list with the text 'After selecting a Training Course, select one or more related Evaluation(s), if applicable.'; another points to the 'Once' radio button with the text 'Training Courses and Evaluations may be set-up to occur only once or periodically. If Auto-Scheduling is activated (described later), periodic Training Courses and Evaluations will be automatically rescheduled when complete.'; and a third points to the 'Schedule evaluation for' field with the text 'It is common to have related Training Courses and Evaluations. It is possible that you will have several Training Courses which always have some form of testing or certification immediately afterward. After selecting a Training Course, select a related Evaluation. Then enter a lag time between each training and evaluation pair.'

TRAINING COURSES		Evaluations	
02-342	Basics of Measurements	03-566e	Confined Space
03-566	Confined Space	02-332e	D. O. T., Hazardous Material
02-332	D. O. T., Hazardous Material	00-032e	Diversity in the Workplace
01-256	Fiber-Optics	01-256e	Fiber-Optics
03-256	Fire Prevention	03-587e	Injury Prevention
03-587	Injury Prevention	01-980e	In-Process Quality Control
01-980	In-Process Quality Control	02-658e	Wire Wrapping
04-002	ISO 9000 Orientation		
01-005	Reading Blueprints		

NUMBER: 01-256  
 TITLE: Fiber-Optics  
 HYPERLINK: http://www.thecoresolution.com

☒ Once  
☐ Periodic

Schedule evaluation for 30 days after training complete.

Buttons: Save, New, Delete, Close

Training Courses and Evaluations may be set-up to occur only once or periodically. If Auto-Scheduling is activated (described later), periodic Training Courses and Evaluations will be automatically rescheduled when complete.

It is common to have related Training Courses and Evaluations. It is possible that you will have several Training Courses which always have some form of testing or certification immediately afterward. After selecting a Training Course, select a related Evaluation. Then enter a lag time between each training and evaluation pair.

## SETTING UP TRAINING COURSES AND EVALUATIONS

1. From the [Control Panel](#), click on the [Course Setup](#) button.
2. The [Course Manager](#) form contains two pages. Use the tabs at the top of the screen to switch between Training and Evaluations.
3. New courses can be added by clicking the **New** button.
  - a. A new record will be automatically created.
  - b. Edit the information at the bottom of the screen.
    - i. A course **Number** is used if you use a code to identify different training requirements (e.g. a procedure number or catalog number). Optional.
    - ii. The **Title** is the name of the training course. Required.
    - iii. A **hyperlink** may be used to reference course descriptions, class information, etc. Hyperlinks entered here will be automatically attached to all *new* training classes. Must be a fully qualified hyperlink (i.e. http://...). Optional.
    - iv. Choose **Once** or **Periodic** depending upon whether the course is regularly required.
  - c. If a related Evaluation will follow the training:
    - i. Select the Evaluation(s) from the list on the right.
    - ii. If it is not listed, add the Evaluation from the **Evaluations Tab**.
  - d. Click **Save**.



## Class Schedule Manager

The Class Schedule Manager is used to schedule and manage Training Classes and Evaluations.

**Note:** This form will not be active if no courses or evaluations are set-up in the [Course Manager](#).

Each scheduled training and evaluation record must be based on a Training or Evaluation Course (see Course Manager). If you haven't yet setup a training course or evaluation, return to the [Course Manager](#). Assigning a class trainer and class members is optional.

After making changes to a Class Record, be sure to press the **Save** button to record your changes in the database.

When the training class or evaluation is complete, select the appropriate record, enter the **Actual** complete date and press **Save**. The record will then move from the **Open** list to the **Closed** list.

Select the **Closed** button at the top of the input screen to review closed (completed) records.

### Training Tab View

**Open:** All current training records  
**Closed:** All completed training records  
**All:** All training records

**Form will "display" only training classes or evaluations that occur within this date range. You can change these dates by entering new Date Filter values on the Control Panel.**

**Turn Auto-Scheduling on or off.**

**Select one or more class members. As the class list changes, just come back to this screen and update the class list.**

**Press **Schedule Evaluations** to automatically schedule associated Evaluations. (not active for training courses which have no associated evaluations defined in the [Course Manager](#)).**

TRAINING CLASSES				
21-123-1	Basic Measurements	11/11/02	Holley	Robert G
01-005-8	Blueprint Class B	08/16/02	Holley	Robert G
02-356-1	Customer Satisfaction	09/09/02	Cash	David

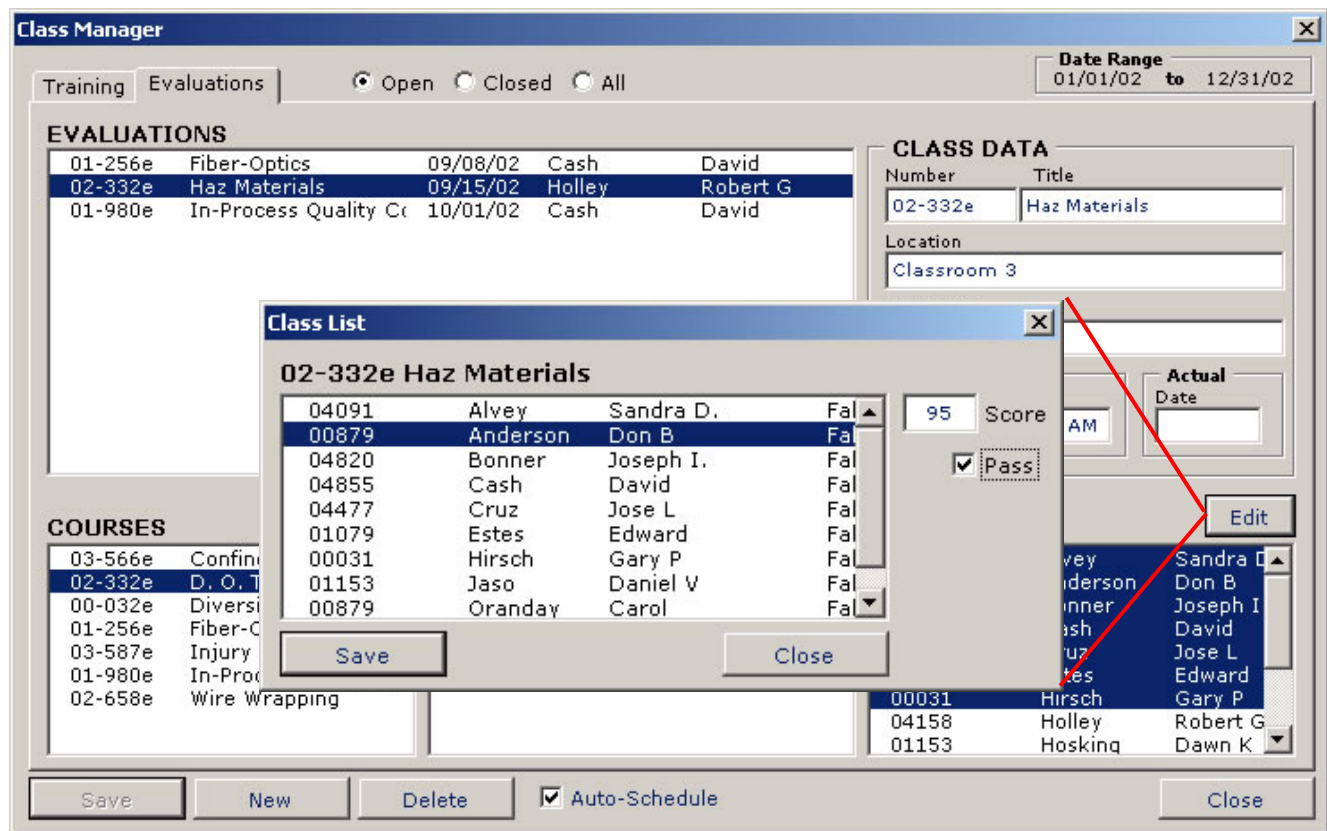
CLASS DATA		
Number	Title	
21-123-1	Basic Measurements	
Location		
Quality Lab		
Hyperlink		
http://www.thecoresolution.com		
Planned		Actual
Date	Time	Date
11/11/02	12:00 PM	

COURSES		TRAINERS		CLASS LIST		
02-342	Basics of Measuremen	04855	Cash	David	04091	Alvey
03-566	Confined Space	04158	Holley	Robert G	00879	Anderson
02-332	D. O. T., Hazardou				04820	Bonner
01-256	Fiber-Optics				04855	Cash
03-256	Fire Prevention				04477	Cruz
03-587	Injury Prevention				01079	Estes
01-980	In-Process Quality				00031	Hirsch
04-002	ISO 9000 Orientati				04158	Holley
01-005	Reading Blueprints				01153	Hosking

CLASS LIST		
04091	Alvey	Sandra L
00879	Anderson	Don B
04820	Bonner	Joseph I
04855	Cash	David
04477	Cruz	Jose L
01079	Estes	Edward
00031	Hirsch	Gary P
04158	Holley	Robert G
01153	Hosking	Dawn K

Save New Delete ☒ Auto-Schedule

## Evaluations Tab View



## SETTING UP TRAINING CLASSES AND EVALUATIONS

1. From the **Control Panel**, click on the **Scheduling** button.
2. The **Class Manager** input screen contains two pages. Use the tabs at the top of the screen to switch between Training and Evaluations.
3. New classes can be added by clicking the **New** button.
  - a. A new record will be automatically created.
  - b. Edit the information at the bottom and right of the screen.
  - c. Course hyperlinks (if any) will be automatically attached to all *new* class and evaluation records. Either use the default course link or enter a new one. Must be a fully qualified hyperlink (i.e. http://...). Optional.
  - d. Click **Save**.
4. To edit an existing class, simply select the record, edit the information and click **Save**.
5. Click **Close** when done.

## Class Schedule Report

The [Class Schedule Report](#) screen displays the records of all students who are currently scheduled for training or evaluations, and who have successfully completed Training and Evaluations.

The **Update** button is used to refresh this view with any changes that have been made to the database.

**[your company name]**

**Update**

**DATE RANGE**  
From: 12/01/01  
To: 12/31/02

**EMPLOYEES**

#	Name	Location	Dept	Shift
1	Alvey, Sandra D.	Denver	Executive	1
2	Anderson, Don B	Denver	Quality	1
3	Bonner, Joseph L.	Denver	Quality	2
4	Cash, David	Lewisburg	Training	1
5	Cruz, Jose L.	Lewisburg	Assembly	2
6	Estes, Edward	Denver	Administration	2
7	Hirsch, Gary P.	Denver	Assembly	1
8	Hosking, Dawn K.	Denver	Training	1
9	Jarrell, Ronald L.	Denver	Assembly	1
10	Jaso, Daniel V.	Lewisburg	Quality	1

**OPEN TRAINING CLASSES**

Number	Title	Date	Trainer	Location
01-005-8	<a href="#">Blueprint Class B</a>	08/16/02 9:00 AM	Holley	Classroom 2a
001-1	Confined Space	12/16/02 1:00 AM	Cash	Denver
02-356-2	Customer Satisfaction	11/02/02 2:00 PM	Cash	Cafeteria

**hyperlink**

**Column and row totals**

The report will only "display" training classes or evaluations that occur within this date range. You can change these dates with the **Date Filter** on the [Control Panel](#).

**Class Report Options**

☒ Open ☒ Training

☐ Closed ☐ Evaluations

**OK** **Cancel**

## Trainer Scheduling Report

The [Trainers Scheduling Report](#) displays records of all open and closed training and evaluations for each trainer.

The **Open** and **Closed** buttons are used to refresh this view with any changes that have been made to the database.

[your company name]

Open Closed

DATE RANGE  
From: 01/01/02  
To: 12/31/02

TRAINER WORKLOADS

Trainer	Class	Students
1 Holley, Robert G	21-123-1 Basic Measurements	5
2 Cash, David	01-005-8 Blueprint Class B	4
	02-356-1 Customer Satisfaction	5
	01-256e Fiber-Optics	2

hyperlink

Row totals

Class data and number of students

The report will only "display" training classes or evaluations that occur within this date range. You can change these dates with the **Date Filter** on the [Control Panel](#).

Control Panel / Class Schedule / **Trainer Scheduling** / Employee Report / Emplo

Ready

## Employee Report

The [Employee Report](#) displays detailed scheduled and current training/evaluations for each employee.

Use the pull-down control at the top of the page to switch between employee records.

Anderson, Don B

### EMPLOYEE TRAINING AND CERTIFICATION REPORT

[your company name]

<b>Name</b>	Anderson	Don B	<b>DATE</b>	12/16/02
<b>Number</b>	00879			
<b>Location</b>	Denver			
<b>Department</b>	Quality			
<b>Shift</b>	1			
<b>Trainer</b>	No			
<b>Remarks</b>	Still needs fork lift training			

Use pull-down list to select any employee or student

#### EVALUATIONS

<b>Scheduled</b>	<b>Date</b>	
01-256e Fiber-Optics	09/08/02	
02-332e Haz Materials	09/15/02	
<b>Current</b>	<b>Date</b>	<b>Expires</b>
03-566e Confined Space	09/14/02	09/14/03

#### TRAINING

<b>Scheduled</b>	<b>Date</b>	
02-356-2 Customer Satisfaction	11/02/02	
<b>Current</b>	<b>Date</b>	<b>Expires</b>
04-002-3 ISO 9000 Orientation	08/09/02	08/09/03
03-566-7 Confined Space	08/15/02	08/15/03
<a href="#">05-002-1 Measurements 101</a>	12/17/02	12/17/03

hyperlink

An expiration date is displayed for "periodic" training and evaluations.

## Export Raw Database Records

The **Export** control on the **Control Panel** displays a data **Export** form which is used to make filtered or unfiltered database queries. After the form opens, simply select the data category from the tabs at the top of the form. Next, select specific data query options (if desired) and press the **Export** button.

Some form panels also allow data to be filtered by a date range. Date range filtering can be used in conjunction with other query options. Simply enter the lower and upper date ranges and press the **Export** button.

The screenshot shows the 'Export' dialog box with the following components and annotations:

- Data categories:** A red box points to the tabs at the top: 'Employees', 'Courses', 'Classes', and 'Class List'.
- Filter queries by date range:** A red box points to the 'Date Filter' section, which contains two date input fields: '01/01/02' and '12/31/02'.
- Multiple query options:** A red box points to the three sections of radio buttons: 'Class Type' (All, Training, Evaluations), 'Class Status' (All, Open, Closed), and 'Pass/Fail' (All, Pass, Fail).

Buttons at the bottom include 'Export' and 'Cancel'.

This control outputs a completely unformatted Excel workbook of the requested raw database data similar to that shown below.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	#	employeeNumber	lastName	firstName	completed	score	passed	classType	classNumber	classTitle	datePlanned	timePlanned	location
2	1	4820	Bonner	Joseph L.	FALSE		FALSE	t	01-005-8	Blueprint Class B	8/16/2002	9:00:00 AM	Classroom 2a
3	2	1153	Hosking	Dawn K.	FALSE		FALSE	t	01-005-8	Blueprint Class B	8/16/2002	9:00:00 AM	Classroom 2a
4	3	1327	Jarrell	Ronald L.	FALSE		FALSE	t	01-005-8	Blueprint Class B	8/16/2002	9:00:00 AM	Classroom 2a
5	4	1153	Jaso	Daniel V.	FALSE		FALSE	t	01-005-8	Blueprint Class B	8/16/2002	9:00:00 AM	Classroom 2a
6	5	4091	Alvey	Sandra D.	FALSE		FALSE	t	02-356-1	Customer Satisfaction	9/9/2002	2:00:00 PM	Cafeteria
7	6	379	Anderson	Don B.	FALSE		FALSE	t	02-356-1	Customer Satisfaction	9/9/2002	2:00:00 PM	Cafeteria
8	7	4477	Cruz	Jose L.	FALSE		FALSE	t	02-356-1	Customer Satisfaction	9/9/2002	2:00:00 PM	Cafeteria
9	8	1078	Estes	Edward	FALSE		FALSE	t	02-356-1	Customer Satisfaction	9/9/2002	2:00:00 PM	Cafeteria
10	9	31	Hirsch	Gary P.	FALSE		FALSE	t	02-356-1	Customer Satisfaction	9/9/2002	2:00:00 PM	Cafeteria
11	10	4855	Cash	David	FALSE		FALSE	t	02-356-3	New Class	8/20/2002		
12	11	4477	Cruz	Jose L.	FALSE		FALSE	t	02-356-3	New Class	8/20/2002		
13	12	1078	Estes	Edward	FALSE		FALSE	t	02-356-3	New Class	8/20/2002		
14	13	31	Hirsch	Gary P.	FALSE		FALSE	t	02-356-3	New Class	8/20/2002		

## Compatibility

### Minimum Specifications

Microsoft® Windows 98se

Microsoft® Excel 97

Processor: 400Mhz

Hard drive space: 2Mb

Screen Resolution: 800x600

## Technical Help

For Technical Support or other questions contact us at [trainingtrack@thecoresolution.com](mailto:trainingtrack@thecoresolution.com).