TrainingRegister® Tutorial

Preparing Completion Certificates

Abstract: This Tutorial will help the user prepare Completion Certificates for participants either before the training is complete, after the training is complete or for an individual.

It will be assumed the user has worked through the Overview Tutorial, knows how to open TrainingRegister®, switch to the sample database if needed and login.

It will also be assumed the user is already logged into TrainingRegister®.

Overview: TrainingRegister® will create a file containing names and other data to be used on a certificate. A word processor is used to create a custom certificate in the form of a merge letter. The word processor is then used to merge with or import the names and other data from the merge file created by TrainingRegister.

If certificates are prepared after the training has been completed, then the hours, etc will be correct for each student. If certificates are prepared in advance of training completion then the certificate must define the same hours, etc for each student because these values will be zero until the training has been completed.

Completion Certificates Merge File

TrainingRegister® creates a merge file that can be used with a word processor to create custom completion certificates. This file can be created in several ways as follows:

Method 1: Training has been completed and enrollment records have been posted to history.

Locate the correct record in the ClassCatalog table.

Select the [Completion Certificates Merge File] button on the [Reports] Tab.

Use the drop down list box to select the correct completion date.

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Select the sorting order.

Select the Certificate Merge File Type. (HTML Table or a Comma-Delimited File)

Note the on screen instructions and/or notes.

Method 2: Training has not been completed. Students are enrolled in a scheduled class.

Locate the correct record in the ClassSchedule table.

Select the [Completion Certificates Merge File] button on the [Reports] Tab.

Select the sorting order.

Select the Certificate Merge File Type. (HTML Table or a Comma-Delimited File)

Note the on screen instructions and/or notes.

Method 3: Create a certificate for an individual before or after training has been completed.

Locate the correct person in the People table.

Select the [Completion Certificates Merge File] button on the [Reports] Tab.

Use the drop down list box to select the correct training from the person's training records.

Select the sorting order.

Select the Certificate Merge File Type. (HTML Table or a Comma-Delimited File)

Note the on screen instructions and/or notes.

Use Word Processor to Create the Certificate

The merge file created contains a plethora of data that can be optionally used on a certificate. A word processor is used to create a custom certificate or certificate template and then prints a unique certificate for each individual using the data from the merge file created with TrainingRegister.

In your word processor search the [Help] file for "mail merge" or "merge letter". Follow the instructions in the word processor to create the custom certificate and merge the data.

Data Source:

Both file types will be saved in C:\TrReports by default unless you designated a different folder for the comma-delimited file.

Depending on your experience or preference, the comma-delimited file or the HTML table might work better. The comma-delimited file should be the easiest if using Microsoft Word to create the certificates. Since the comma-delimited file is difficult to read visually, you could display an HTML file for a visual and still use the comma-delimited file for the data source.

Access File: If an Access file is desired, use Access to import the comma-delimited file into a new table.

Excel File: Either copy and paste the HTML table into an empty worksheet or use Excel to import from the HTML file. Note the file location in the browser address when it is first displayed.