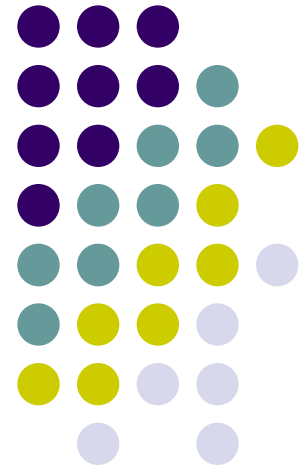


# Training Tracker 5

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Product Tour



# Computer Directions

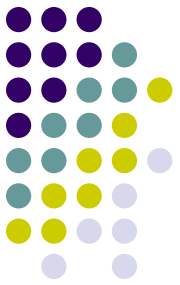


- Thousands of satisfied customers
- Training Tracker developed and maintained since 1998
- Twenty years of experience developing software for PCs

# Training Tracker Advantages



- Multi-User Network ready at no additional charge
- Uses standard Microsoft Access data format
- Simple and easy to use



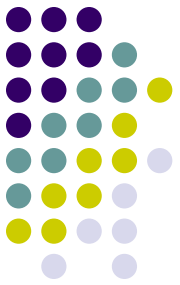
# The Problem

- Sort training records by person, it is difficult to get a list of people who have a given certification
- Sort training records by course, it is difficult to find what a given person has accomplished
- Keep a list in a table in a spreadsheet, it is difficult to keep an audit trail

# Training Tracker solves this and more!



- Maintain employee training data quickly and efficiently
- Cross-reference easily
- Keep up with next month's training needs
- Generate reminder emails
- FDA compliance



# Personnel Screen

- Manage people from the personnel screen

The screenshot shows the 'Personnel Screen' window in the 'Training Tracker' application. The window has a menu bar with 'Files', 'Reports', 'Utility', and 'Exit'. The 'Personnel Screen' menu is open, showing options like 'Manage Tasks for Person', 'Add 1 Task to Group', and 'Add Multiple Tasks'. The main area contains a table of personnel records.

Last Name	First Name	SSN	ID/Badge	Double Click in C
Bentor	Bobby	123-45-6789	5874983257	Junk@ComDirect
Blackmon	Charlie	234-23-4234	12367	Charlie@Yahoo.C
Bonner	Theo	234-56-1234	AB123	Theo@Yahoo.Co
Moore	John	333-33-3333	534567	
Nuhouse	Sadie	234-56-1234	NN23746	Sadie@Yahoo.Cc
Summers	Gail	256-34-1235	GG36174	Gail@Yahoo.Com

Below the table, there is a 'Locate' section with radio buttons for 'Last Name', 'First Name', 'SSN', and 'ID/Badge'. A text input field is next to it. To the right are three buttons: 'Edit' (yellow), 'Add New' (red), and 'Close' (green). The bottom left corner of the window shows 'Version 5.3 August'.

# Personnel Screen



Personnel Screen

Locate | Personal Info | User Defined 1 - 15 | User Defined 16 - 30 | Documents / Notes | Picture | Hire / Term | Add New

Last Name	First Name	SSN	ID/Badge	Double Click in Co
Bentor	Bobby	123-45-6789	5874983257	Junk@ComDirect
Blackmon	Charlie	234-23-4234	12367	Charlie@Yahoo.Co
▶ Bonner	Theo	234-56-1234	AB123	Theo@Yahoo.Co
Moore	John	333-3		
Nuhok	Sadie	234-5		
Summers	Gail	256-3		

Choose a person, click edit

Locate  
Last Name   
First Name   
SSN   
ID/Badge

Edit

Employee: Bonner, Theo

Locate | Personal Info | User Defined 1 - 15 | User Defined 16 - 30 | Documents / Notes | Picture | Hire / Term | Add New

First Name: Theo  
Last Name: Bonner

Job Title: Doctor  
Dept: X-Ray  
Category: Management

Internal Address: Room 485

Home Address: 56 Nautical Drive  
Charleston, SC 29407

Home Phone:

SSN: 234-56-1234  
ID / Badge: AB123  
Internal Phone: 766-3444  
Internal FAX: 766-2333  
E-Mail: Theo@Yahoo.Com  
[Click here to send email - Now](#)

Date of Birth: 03/25/1970  
Blood Type: A+  
Sex:  Female  Male

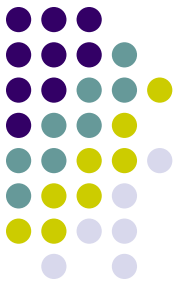
Medical Alerts and Allergies:

My Reminder! Call him for a dental appointment  
(Your yellow sticky note for this person)

Delete Save

# Person Details

## Store Personal Data



Employee: Bonner, Theo

Locate Personal Info User Defined 1 - 15 User Defined 16 - 30 Documents / Notes Picture Hire / Term Add New

First Name	Theo	Last Name	Bonner
Job Title	Doctor	SSN	234-56-1234
Dept	X-Ray	ID / Badge	AB123
Category	Management	Internal Phone	766-3444
Internal Address	Room 485	Internal FAX	766-2333
		E-Mail	Theo@Yahoo.Com
			<a href="#">Click here to send email - Now</a>
Home Address	56 Nautical Drive	Date of Birth	03/25/1970
	Charleston, SC 29407	Blood Type	A+
Home Phone		Sex	<input type="radio"/> Female <input type="radio"/> Male
		Medical Alerts and Allergies	

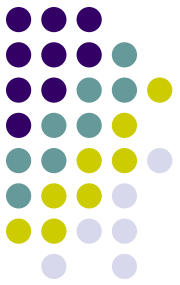
**My Reminder!** Call him for a dental appointment  
( Your yellow sticky note for this person )

**Delete** **Save**



# Person Details

Add notes or attach documents

A screenshot of a software window titled "Employee: Bonner, Theo". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a tabbed interface with several tabs: "Locate", "Personal Info", "User Defined 1 - 15", "User Defined 16 - 30", "Documents / Notes", "Picture", "Hire / Term", and "Add New". The "Documents / Notes" tab is currently selected. The main content area is divided into two sections. The top section is titled "Notes" and contains a large, empty text area with a vertical scrollbar on the right side. The bottom section is titled "Attached Documents" and contains the text "Double Click to Open Document". Below this text are two buttons: "Add" and "Delete".

# Person Details

Include images



Employee: Bonner, Theo

Locate | Personal Info | User Defined 1 - 15 | User Defined 16 - 30 | Documents / Notes | Picture | Hire / Term | Add New




Image File

# Person Details

Hire and termination dates



Employee: Bonner, Theo

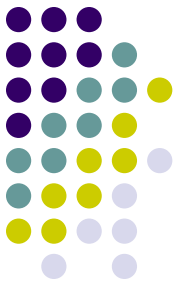
Locate | Personal Info | User Defined 1 - 15 | User Defined 16 - 30 | Documents / Notes | Picture | Hire / Term | Add New

**Confidential**

**Hire Date**

**Terminate Date**

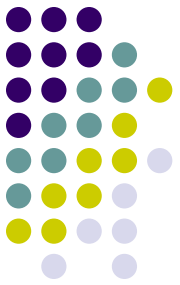
# Master Task List



- Use the Master Task List to keep track of tasks
- A task can be
  - a to-do item
  - a course to be taken
  - a procedure that requires training.



# Master Task List



- From the master task list you add or edit tasks

The screenshot displays the 'Master Task List - Add, Change, Delete Tasks' software interface. It features a main window with a task list table and a detailed configuration dialog for a selected task.

Task	Repe
COURSE WORK	
TEST	

**Master Task List - Add, Change, Delete Tasks**

Task Title: COURSE WORK

Description: [Empty text area]

Estimated Hours: 0 of class time      Continuing Education Units (CEU): 0

**This Task is Repeated**

Task is a Repeater (Check = Yes)       Task is REPEATED every :  
Years [ ] Months [ ] Days [ ]

**Once Completed - This Task Expires**

Task Expires (Check = Yes)       Task EXPIRES after :  
Years [ ] Months [ ] Days [ ]

Buttons: Delete (red border), Cancel, OK (green border)

**Master Task List - Add, Change, Delete Tasks**

Locate: [Input field]

Buttons: Add, Edit, Close (green border)

# Master Task List



Master Task List - Add, Change, Delete Tasks

Task Title

Description

Estimated Hours  of class time      Continuing Education Units (CEU)

**This Task is Repeated**

Task is a Repeater (Check = Yes)       Task is REPEATED every :

Years  Months  Days

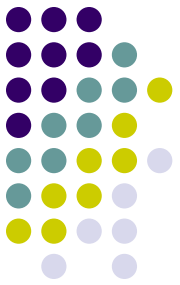
**Once Completed - This Task Expires**

Task Expires (Check = Yes)       Task EXPIRES after :

Years  Months  Days

Set up repeating tasks or expiration dates



# Link tasks to people

- Select manage tasks for one person, then choose a person

The screenshot shows the 'Training Tracker' application with the 'Manage Tasks - Select Person' dialog box open. The dialog box contains a table of people and a 'Select Person' button.

Last Name	First Name	SSN	ID/Badge	Internal Pho
Bentor	Bobby	123-45-6789	5874983257	766-4003
Blackmon	Charlie	234-23-4234	12367	766-2334
Bonner	Theo	234-56-1234	AB123	766-3444
Moore	John	333-33-3333	534567	
Nuhouse	Sadie	234-56-1234	NN23746	766-3294
Summers	Gail	256-34-1235	GG36174	766-2334

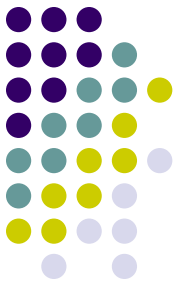
Below the table, there is a 'Locate by' section with radio buttons for 'Last Name', 'First Name', 'SSN', and 'ID/Badge'. The 'Last Name' radio button is selected. To the right of the 'Locate by' section are two buttons: 'Select Person' (highlighted in yellow) and 'Close' (highlighted in green).

## Training Tracker Demo

Version 5.3 August 12, 2004

Copyright (C) Computer Directions 1997- 2004

# Link tasks to people



Tasks for - Bonner, Theo

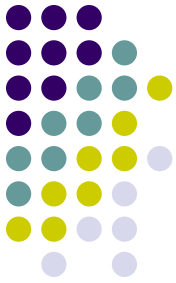
**Bonner, Theo** 766-3444  
**Doctor** AB123  
234-56-1234 **Management**  
**X-Ray** [Theo@Yahoo.Com](mailto:Theo@Yahoo.Com)

Task	Date Due	Completed	Expires	Hours	C.E.U.s	NOTE
▶ Signal Systems Certification	7/29/2004			0	0	
Safety Systems Training	7/29/2004			0	0	
Annual Emergency Power Test	7/29/2004			2	0	
Annual Building Inspection	7/29/2004			34	0	
Using The Computer 101	8/22/2004			0	0	
Signal Systems Certification	8/22/2004			0	0	
Safety Systems Training	8/22/2004			0	0	
Emergency Communications	8/22/2004			2	0	
Driver Testing	8/29/2004			8	0	

Sort by Task   
Sort by Date Due   
Sort by Date Completed

From this screen you can add/edit tasks, or mark tasks as complete

# Groups of tasks



**Training Tracker**

Files Reports Utility Exit

- Personnel Screen
- Manage Tasks for 1 Person
- Add 1 Task to Group of People
- Add Multiple Tasks to Group of People
- Master Task List
- Manage Groups of Tasks**
- Maintain Departments Pick List
- Maintain Job Titles Pick List
- Maintain Category Pick List
- Maintain User Defined Fields
- Get Barcode Scans
- Exit

Version 5.3 August 12, 2004

**Build Groups - of tasks**

Group Name Edit / Delete Group Name

**BUILDING MAINT**

Number	Name
4	Annual Building Inspection
5	Annual Emergency Power T
19	Safety Systems Training
28	Signal Systems Certification

Refresh Task Names

**Add**

Manage Master Task List

**Master Task List**

Number	Name
7	WordPerfect Advanced
14	Swim Certification
15	Life Boat Training
16	Emergency Communicati
17	Advanced Welding
18	Beginning Welding
19	Safety Systems Training
20	Waste Management
21	Shot Administration
22	Form 1210 Cert
23	Hydraulic System Analy
24	Pressure Pump Repair
25	Automotive Training
26	Driver Testing
27	Machine Tool Safety
28	Signal Systems Certificati

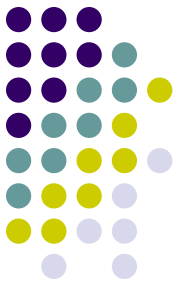
**Delete**

**Done**

**Add New Group** **Edit Selected Group** **Close**

Arrange tasks into groups that can be assigned to employees or students

# Groups of People



Add a Task to a Group of People

Step 1 - Select Task | **Step 2 - Select People** | Step 3 - Review List of People | Step 4 - Add Task

### Select Task to be Applied to Group

- 1** Pick the TASK from the list
- 2** Select completion date.  
05/05/2005
- 3**

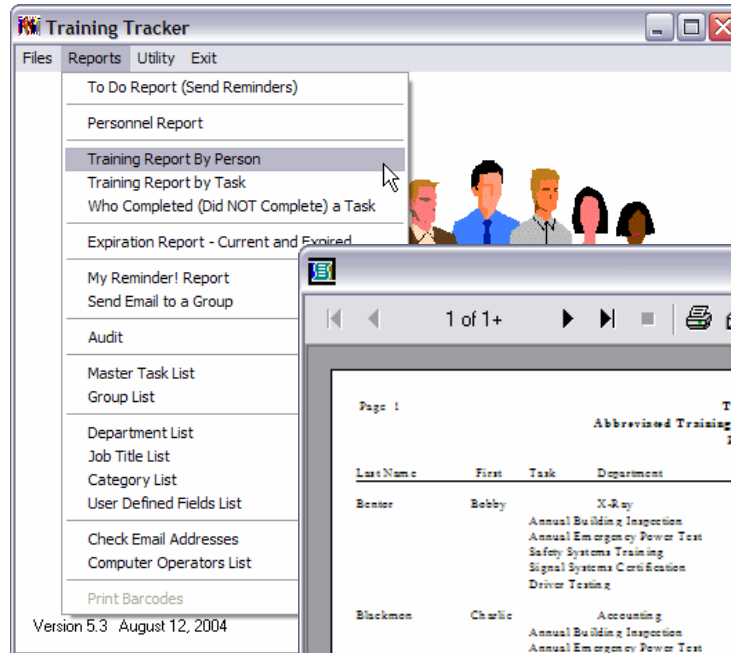
TASK	
Advanced Welding	v
Annual Building Inspection	Ir
Annual Emergency Power Test	E
Automotive Training	F
Beginning Welding	T
CPR Training	E
Driver Testing	M
Drug Test	A
Emergency Communications	F
Form 1210 Cert	T
Get Flu Shot	A
Hydraulic System Analysis	F
Life Boat Training	A
Machine Tool Safety	E
Pressure Pump Repair	
Safety Systems Training	
Shot Administration	
Signal Systems Certification	
Swim Certification	
Using The Computer 101	

Apply tasks or groups of tasks to groups of people to quickly accomplish assignment of training.

Easy to use screens will guide you through the process.

# Reports

View assigned training by person or by task

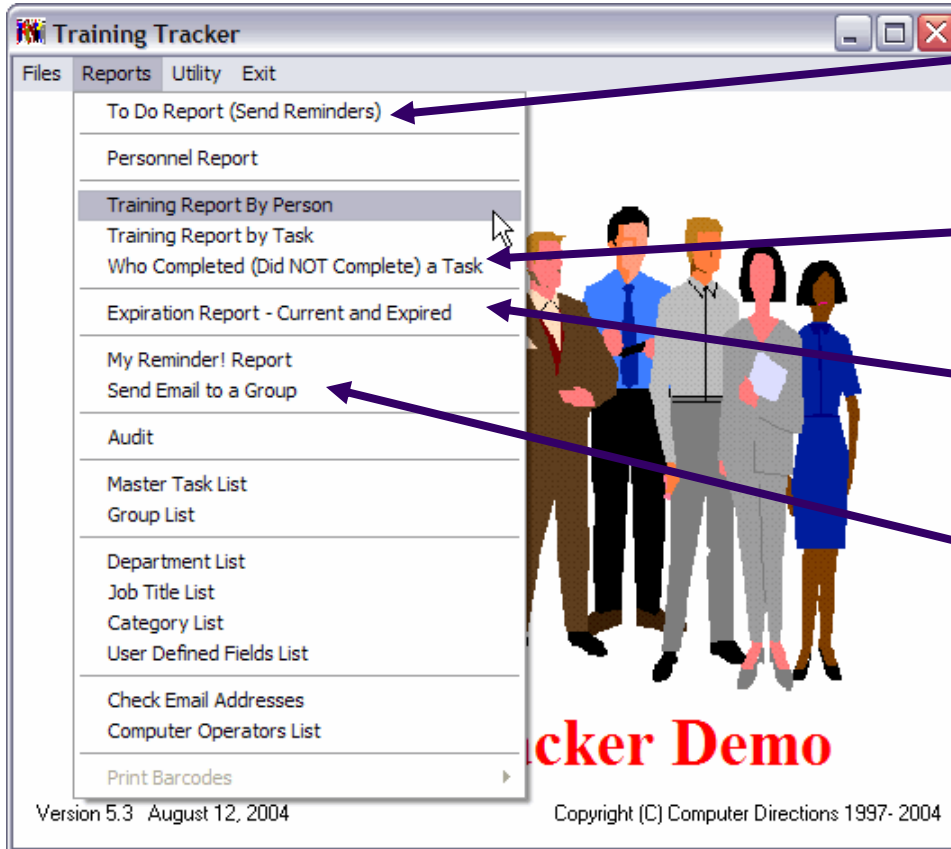


The screenshot shows a detailed report window titled 'Abbreviated Training Report - Grouped by Person'. The report is for 'Page 1' of '1 of 1+' pages, dated '05/05/2005'. The report is for 'TESTING' and shows training assignments for three individuals: Bobby Benter, Charlic Blackmon, Theo Bonner, and John Moore. The table lists tasks, departments, and due dates.

Last Name	First	Task	Department	Date Due	Date Complete	Date Expires
Benter	Bobby	X-Ray				
		Annual Building Inspection		7/29/2004		
		Annual Emergency Power Test		7/29/2004		
		Safety Systems Training		7/29/2004		
		Signal Systems Certification		7/29/2004		
		Driver Testing		8/29/2004		
Blackmon	Charlic	Accounting				
		Annual Building Inspection		7/29/2004		
		Annual Emergency Power Test		7/29/2004		
		Safety Systems Training		7/29/2004		
		Signal Systems Certification		7/29/2004		
		Emergency Communications		8/22/2004		
		Safety Systems Training		8/22/2004		
		Signal Systems Certification		8/22/2004		
		Using The Computer 101		8/22/2004		
		Driver Testing		8/29/2004		
		Beginning Welding		10/29/2004		
		Safety Systems Training		10/29/2004		
		Hydraulic System Analysis		10/29/2004		
		Pressure Pump Repair		10/29/2004		
Machinist Tool Safety		10/29/2004				
Emergency Communications		11/29/2004				
Safety Systems Training		11/29/2004				
Signal Systems Certification		11/29/2004				
Using The Computer 101		11/29/2004				
Bonner	Theo	X-Ray				
		Annual Building Inspection		7/29/2004		
		Annual Emergency Power Test		7/29/2004		
		Safety Systems Training		7/29/2004		
		Signal Systems Certification		7/29/2004		
		Emergency Communications		8/22/2004		
		Safety Systems Training		8/22/2004		
Signal Systems Certification		8/22/2004				
Using The Computer 101		8/22/2004				
Driver Testing		8/29/2004				
Moore	John	Accounting				
		Annual Building Inspection		7/29/2004		
		Annual Emergency Power Test		7/29/2004		



# Reports



View a report of items coming due or send reminders

See what tasks have been completed (or not)

Find out what training will expire soon

Send Emails

# Security

- Set up security, passwords, and user levels.
- Customize the access of each security level

The image shows two overlapping windows from a software application. The background window is titled 'Passwords' and contains a table with the following data:

Last Name	First Name	Last Time In	ID	Level	Date
UserLevel9	Test	2/3/2004 6:41:46 PM	324324	9	1/9/2004 11:3
Bosticker	Bill		342212	3	1/22/2004 1:3
Jacobs	Jan		2384798	5	1/22/2004 1:3

Below the table are 'Add' and 'Edit' buttons. A yellow tooltip at the bottom reads: 'When starting Training Tracker, ask for password ? C'.

The foreground window is titled 'Set Security Levels for Menu Selections'. It contains the following text: 'Each PASSWORD is assigned a security level from 1 to 9. The listing below allows you to set the security level that can access a menu selection.' Below this is a heading: 'Enter a Security Level from 1 (low) to 9 (high)'. The window contains a table with the following data:

Menu Selection	Level
Personel Screen	
Manage Tasks	
Add 1 Task to Group	
Add Multiple Tasks to Group	
Master Task List	
Manage Task Groups	
Maintain Departments Pick List	
Maintain Job Titles Pick List	
Maintain Category Pick List	
Maintain User Defined Fields	
Get Barcode Scans	
Get Class Roll Sheet Barcodes	
Get Attendance Barcode Scans	
To Do Report (Reminders)	
Personnel Report	
Training Report By Person	
Training Report by Task	
Who Completed	
Expiration Report	
My Reminder! Report	
Send Email to a Group	

At the bottom of the foreground window is a 'Check and Exit' button.





# Network Install

- System can be installed in multi-user mode on a network
- Training tracker is licensed for up to 45 users free of charge



# How to Order

- Call us with a credit card 1-866-571-2108
- Fax your order to 843-766-0105
- Send us snail mail:  
computer directions, llc  
3 Gamecock Avenue Ste 308-A  
Charleston, SC 29407