Plan to Succeed ➡ "Begin with the End in Mind"

Determine how you will use MaxTrax to deliver requried training and gather meaningful training records.

Structure your MaxTrax database to reflect your organization
and design the layout of the training to address your specific training requirements and job classifications.

1. Select *Unique* Usernames

The username you choose, paired with a password, create a unique Login ID in the MaxTrax database. Duplicate parings are not possible; however, duplicate usernames can occur and cause problems with tracking and reporting.

Use the default Username which is e-mail address.
(dummy addresses may be assigned for those without email.)

OR

Use an existing individualized ID such as

- employee number
- social security number
- phone number
- etc.

Just be sure usernames are unique!

2. *Organize* Your Students

The Organization ID is used to group individuals for searching and sorting. Each Student is associated with only one organization.

Select an Organization ID that mirrors your operational structure, such as:

- department
- ward
- squadron
- etc.

As employees move to new jobs, you can edit their Organization ID.

3. Define *Useful* Data Fields

These data fields provide secondary sorting opportunities.

Use up to nine data fields.

You have considerable flexibility in how you choose to use these fields. You can rename, reformat and edit them per your specifications.

For Example:

- location
- job code
- job title
- hire date
- active/Inactive status
- rank or level

Remember: Only those fields you maintain are valid.

Minimize tedious keyboard input by using your existing data as much as possible.

4. Build Your Roster

Collect and import data from electronic resources (or manually input data) to populate the spreadsheet you created in the first 3 steps, i.e., Username, Organization, and organization-specific Data Fields.

Batch Processing

There are several options available for loading large numbers of students into MaxTrax without doing individual transactions.

PerforMax3 can build an initial database load file for you from a spreadsheet of student information.

In addition, a batch interface program is available to periodically add/update student information.

5. Decide Who Needs What

Group related training topics into something we call "Courses."

Group employees with similar training requirements into something we call "Classes"

The two-part process for creating a course is:

- Create the course record using the Add-Course transaction.
- Add lessons using the Add Lesson to Course transaction.

The two-part process for creating a class is:

- Define the class using the add-class transaction.
- Add students to the class as members.

A student can be a member of one class, multiple classes or no class.

6. Assign Training

Use the Assign Courses transaction to assign training to an individual or to a class of employees (All students in the class will automatically be assigned all courses assigned to the class.).

Think then do.

In a perfect world, training will be assigned once, then made to "expire" at a predetermined time:

- one calendar date for all employees
- a unique date associated with each employee (hire date)
- the length of time from completion of the training

Think if/how an expiration setting will be used to achieve "automatic" expiration and assignment.

Do assign training using the Assign Courses transaction.

J. Richard Reynolds

Digitally signed by J. Richard Reynolds
DN: CN = J. Richard Reynolds, C = US, O = PerforMax3, OU = CTO
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Date: 2007.10.10 14:51:41 -04'00'