



# **Roster Tool User Guide**

**EMS Solutions, Inc.**

**Meeting the Software Needs for  
the Healthcare Professional**

**TC Command  
Roster Tool**

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## Capabilities

The Roster Tool, provided by TC Command®, gives the individual instructor or small training site the following capabilities to manage emergency cardiac care training records:

- Record instructors, including expiration dates for teaching credentials
- Record class information, including date, time, location, and instructors
- Record student information, including name, contact information, and class
- Update instructor, class, and student information
- Find classes and students
- Track class registration
- Print list of all classes
- Print class sign-in sheets
- Post student results, including remediation
- Print and e-mail class rosters (front and back)
- Create additional course types

User documentation includes this user guide, help windows available via the help icon  on each screen and tab, and a tool tip for each field and button.

Training Centers with the TC Command Management® or WorldPoint ONE® application can use the information sent via e-mail from the Roster Tool to recreate the class, import the students, and print the wallet cards.

Contact EMS Solutions regarding the TC Command Training Center Management Software if additional capabilities are needed for managing your training classes, or if server capabilities are appropriate for your environment.

## Preparation

Before using the Roster Tool to record class and student information, perform these steps.

### Download

Download the Roster Tool from the TC Command website at [www.TCCommand.com](http://www.TCCommand.com). See download and install instructions on that website.

### Install

Install the Roster Tool on your computer. See download and install instructions on the TC Command website.

### Initial Setup

Set up the Roster Tool by defining the Training Center that will receive your rosters and the instructors who will teach your classes.

After starting the Roster Tool from the desktop icon for the first time, choose [General Setup] from the main menu, then use the *Training Center* and *Instructors* tabs.

See Training Center on page 6 and Instructors on page 8.

## How to Start/Stop

To open the Roster Tool main menu, click the desktop icon.



To exit the Roster Tool, click [QUIT] on the main menu, then confirm by clicking [QUIT Roster Tool].

Always exit Roster Tool from the main menu. Click [Main Menu] to return to the main menu, then choose [QUIT] to exit the Roster Tool properly and close files in an orderly fashion.

## Quick Summary

After downloading and installing the Roster Tool, and performing the initial setup, follow these steps when using the Roster Tool on a regular basis.

### 1. Create Class

Create the classes you will be offering. Choose [Class Registration] from the main menu, then choose {New Class}. See Create a New Class on page 13.

### 2. Notify Training Center

Notify your affiliated Training Center of the planned class. In the *Class Registration* screen, choose [Notify Training Center]. See Notify Training Center on page 18.

### 3. Register Students

Register students in classes, then post student results when the class is completed. Choose [Student Data Entry] from the main menu. See Register a New Student on page 28.

### 4. Send Roster

Submit the class roster to the Training Center, by printed report or e-mail. See Rosters on page 39.

### 5. Mark Class Submitted

Mark the class as submitted on the *Class/Skill Session Data* tab in the *Class Registration* screen. See Mark a Class Submitted on page 19.

### 6. Create Next Class and Register Students

Use the *Class Registration* screen to create a new class with {New Class} or duplicate a class with [COPY Class]. See Create a New Class on page 13 or Copy and Change a Class on page 19.

Use the *Student Data Entry* screen to create a new student record with {New Student}, copy an existing student record with [COPY Student], or change the class in an existing student record. See Register a New Student on page 28 or Register an Existing Student on page 32.

### 7. Back Up

Copy your valuable data to external media. See Backup on page 63.

## Basic Setup

After downloading and installing the Roster Tool, perform this basic setup before creating classes and registering students.

Use setup initially to:

- Define your affiliated Training Center
- Add instructor information

Return to General Setup at any time to add or change settings or information. See Paper Size on page 59 if you print on A4 paper.

From the Roster Tool main menu, choose [General Setup] to reach the *General Setup* screen.

The screenshot displays the 'General Setup' interface of the TC Command Roster Tool. On the left, a sidebar menu includes 'Class Registration', 'Student Data Entry', 'General Setup (Required)', 'QUIT', and 'User Guide'. The main window is titled 'General Setup' and features a 'Training Center' tab. The form is titled 'Describe your affiliated Training Center (TC)'. It contains several input fields: 'TC Name' (placeholder: 'Enter TC name in setup...'), 'TC Coordinator', 'TC Phone / Fax', 'TC ID #', and 'TC State & Country'. Below these are two email fields: 'TC E-Mail for Announcement' (placeholder: 'Enter TC e-mail for Class Announcement in setup...') and 'TC E-Mail for Roster Submittal' (placeholder: 'Enter TC e-mail for Roster Submittal in setup...'). A section for 'National Organization (and header for front of roster)' contains a text box with 'American Heart Association Emergency Cardiovascular Care Program' and a 'Logo' section with an image of the American Heart Association logo and buttons for '<< Insert Logo' and '<< Restore Logo'. A 'Main Menu' button is in the top right corner.

## Training Center

Set up the information about your Training Center before e-mailing your Training Center about a planned class and before printing a roster.

### Enter Information

This tab describes the Training Center (TC) that will receive your rosters.

In the *General Setup* screen, choose the *Training Center* tab (if it is not displayed).

Type data in the fields. Include all yellow fields for basic Roster Tool functionality, and additional fields as appropriate. Refer to the tool tips on the tab for information about individual fields.

Training Center		Instructors	Settings	Course Types	Course Options
<b>Describe your affiliated Training Center (TC).</b>					
TC Name	Training Headquarters				
TC Coordinator	John Smith				
TC Phone / Fax	(800) 555-1212				
TC ID #	NY00000				
TC State & Country	NY		USA		
TC E-Mail for Announcement	jsmith@TrainingHeadquarters.org				
TC E-Mail for Roster Submittal	rrichardson@TrainingHeadquarters.org				

### **Change Information**

To change information about your affiliated Training Center, use the *Training Center* tab to add and correct information as needed.

#### **Example**

To add the TC phone number, type the new information in the field.

TC Name	Training Headquarters	
TC Coordinator	John Smith	
TC Phone / Fax	(800) 555-1212	
TC ID #		
TC State & Country	NY	USA

#### **Next Step**

Set up instructors after completing the Training Center information.

## Instructors

This tab lists the instructors who will teach your classes. Add instructors and update instructor information as appropriate, and delete instructor records when no longer needed.

In the *General Setup* screen, choose the *Instructors* tab to:

- Add instructors
- Maintain expiration dates for instructor credentials

Add a record for each instructor, including the certification expiration date.

Note: Instructors are listed alphabetically by last name.

Instr. ID	First Name	M.I.	Last Name	Ext.	Expiration Date	
<input type="text"/>	<input type="button" value="ADD Instructor"/>					
22	Tom		Johnson		10-31-11	<input type="button" value="DELETE?"/>
20	Michael		Jones		04-30-12	<input type="button" value="DELETE?"/>

### Add Instructor

Use the *Instructors* tab to add an instructor to the Roster Tool. Refer to the tool tips on the tab for information about individual fields.

Complete the appropriate fields at the top of the tab, and click [ADD Instructor].

The new instructor record is added to the list of instructors.

1. Complete these fields

2. Click here

3. New instructor added to list here

Note: If the Training Center will be importing your roster information into TC Command Management or WorldPoint ONE, then obtain the correct instructor IDs from the Training Center before setting up any instructors. Each instructor record must contain the ID used by the Training Center, to facilitate proper importing of rosters into TC Command Management or WorldPoint ONE.

### Update Instructor Information

To change an instructor record, click the information that needs to be changed, and enter the correct information.

#### Example

When an instructor renews his or her teaching certification, enter the new expiration date.

Change expiration date

### ***Instructor with Multiple Certifications***

If an instructor's teaching assignments require different certifications, then create one record for each of the instructor's certifications that will be needed for your classes, using the same identification number and appending several letters at the end to indicate the type of certification.

#### ***Example***

<b>Instr. ID</b>	<b>First Name</b>	<b>M.I.</b>	<b>Last Name</b>	<b>Ext.</b>	<b>Exp. Date</b>
23BLS	Jill		Sawyer		01-31-12
23FA	Jill		Sawyer		03-31-12
23ACLS	Jill		Sawyer		06-30-12

Note: If the ID is longer than the field, click the ID to display the additional characters.

### ***Delete Instructor***

To delete an instructor from the Roster Tool, click the [DELETE?] button by the instructor record, then click [Delete] to confirm the deletion.

### ***Next Step***

After the Training Center and instructor information have been added in General Setup, return to the main menu to create classes and register students.

## Classes

Add instructors in General Setup before creating classes.

Create classes, either before or after the class is held. When creating a class, specify the class type, start/end dates and times, location, lead instructor, any assisting instructors, and training site (if the class is run through a training site).

Create the class in the Roster Tool before the class date and e-mail it to your Training Center to comply with AHA guidelines. When necessary, classes can be entered in the Roster Tool after they have been taught, for the purposes of printing or e-mailing the roster.

From the Roster Tool main menu, choose [Class Registration] to:

- Create a class
- E-mail a planned class to the Training Center
- E-mail a roster
- Print a roster (front)
- Review classes
- Change class information

## Class Registration

Class Number

Course Type

Sub-Option (if Applicable)

**Required fields  
in yellow**

< Clear Field

## Class Location

Location Name

Address

City  State

Zip  Country

Training Site Name (if applicable)

Class/Skill Session Data		Instructor Data
<p>Dates Times (Use 24 hour clock, ie. 4pm = 16:00)</p> <p>Start <input type="text" value="09-13-2011"/> <input type="text" value="18:00"/></p> <p>End <input type="text" value="09-13-2011"/> <input type="text" value="21:00"/></p> <p>Total Class Hours <input type="text" value="3.0"/></p> <p><input checked="" type="radio"/> Initial Training <input type="radio"/> Renewal Class <input type="radio"/> Online</p> <p>Outside Students <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Student-to-Manikin Ratio <input type="text" value="4:1"/></p> <p>Send Cards to <input type="text" value="Students"/></p> <p>Books, manikins, supplies needed from TC for class <input type="text"/></p> <p><b>Roster Submitted?</b> <input type="radio"/> Yes, if roster has been sent  <input checked="" type="radio"/> No, to keep class on list of available classes</p>		<p><b>?</b></p> <p>Enrollment Counts</p> <p>Estimated <input type="text" value="16"/></p> <p>Registered <input type="text" value="15"/></p> <p>Completed <input type="text" value="14"/></p> <p>Remediated <input type="text" value="6"/></p>

## Create a New Class

Use the *Class Registration* screen to create a class. Choose {New Class} at the top of the screen and complete all required yellow fields, and other fields as appropriate. Refer to the tool tips on the screen for information about individual fields.

### Course Type

The fields at the top of the screen describe the type of class.

Class Registration	
Class Number	<input type="text"/>
Course Type	Family and Friends CPR

**Required fields in yellow**

### Heartsaver Class Example

To create a new class with Heartsaver sub-options, choose the course type, then the sub-options from the list of sub-options available for this course type.

Course Type	Heartsaver CPR AED
Sub-Option (if Applicable)	Adult CPR AED and Child CPR AED

### Class Location

These fields near the top of the screen describe the teaching location.

Class Location			
Location Name	Anytown Community Center		
Address	125 Main St		
City	Anytown	State	NY
Zip	10900	Country	USA
Training Site Name (if applicable)	<input type="text"/>		

### ***Class/Skill Session Data Tab***

The fields on the *Class/Skill Session Data* tab in the *Class Registration* screen describe class specifics, including date, time, and length of class.

Class/Skill Session Data		Instructor Data
<p>Dates                      Times (Use 24 hour clock, ie. 4pm = 16:00)</p> <p>Start <input type="text" value="09-13-2011"/> <input type="text" value="18:00"/></p> <p>End <input type="text" value="09-13-2011"/> <input type="text" value="21:00"/></p> <p>Total Class Hours <input type="text" value="3.0"/></p> <p><input checked="" type="radio"/> Initial Training   <input type="radio"/> Renewal Class   <input type="radio"/> Online</p> <p>Outside Students <input checked="" type="radio"/> Yes   <input type="radio"/> No</p> <p>Student-to-Manikin Ratio <input type="text" value="4:1"/></p> <p>Send Cards to <input type="text" value="Students"/></p> <p>Books, manikins, supplies needed from TC for class <input type="text"/></p> <p><b>Roster Submitted?</b>   <input type="radio"/> Yes, if roster has been sent  <input checked="" type="radio"/> No, to keep class on list of available classes</p>		<p>Enrollment Counts</p> <p>Estimated <input type="text" value="16"/></p> <p>Registered <input type="text" value="15"/></p> <p>Completed <input type="text" value="14"/></p> <p>Remediated <input type="text" value="6"/></p>

Note: Be very careful with the Roster Submitted? radio buttons on this tab. A class remains available for registering students until it is marked as submitted in the Roster Tool. If you still need to register students in the class and print or e-mail the roster, then the class is not yet submitted.

Note: If you are creating two classes at the same time on the same day at the same location, alter the start time slightly, so they will both be available on the dropdown list of available classes in the *Student Data Entry* screen. For example, start one class at 9:00am and the other class at 9:01am.

**Instructor Data Tab**

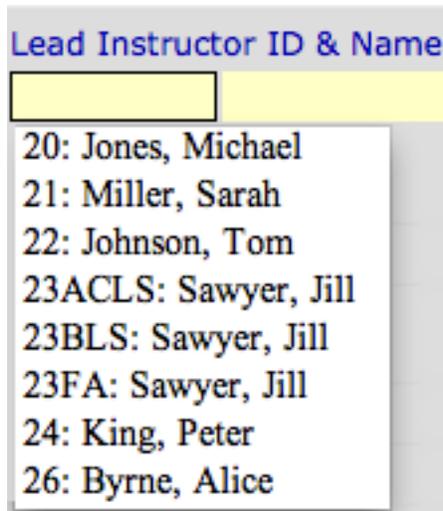
Use the *Instructor Data* tab in the *Class Registration* screen to assign the instructor(s) to the class.

A lead instructor must be assigned to the class. If assisting instructors are assigned, the first twelve are included on the printed roster, while all assisting instructors are included in the e-mailed roster.

Class/Skill Session Data		Instructor Data		
Lead Instructor ID & Name		Exp. Date		?
22	Johnson, Tom	10-31-13		
Assisting Instructor(s)		Exp. Date	Modules	3 Assisting
23BLS	Sawyer, Jill	01-31-12	Adult	Delete?
24	King, Peter	01-31-13	Child	Delete?
26	Byrne, Alice	12-31-11	AED	Delete?
				Delete?
All assisting Instructors are included in e-mail; the first 12 are printed on front of roster.				
Manikin Decontamination	Tom Johnson			
Course Director				
Physician Instructor				

**Assign Lead Instructor**

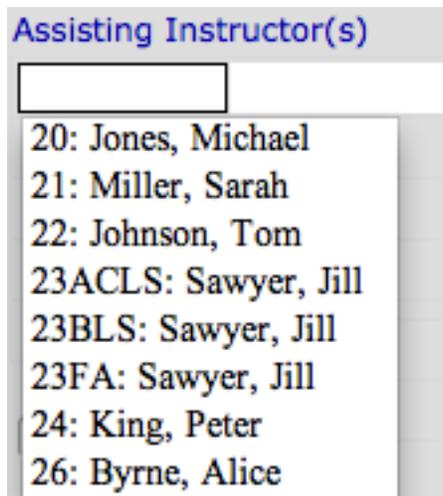
Select the lead instructor's ID from the dropdown list.



The screenshot shows a dropdown menu titled "Lead Instructor ID & Name". The menu is open, displaying a list of instructor names and their IDs. The list items are: 20: Jones, Michael; 21: Miller, Sarah; 22: Johnson, Tom; 23ACLS: Sawyer, Jill; 23BLS: Sawyer, Jill; 23FA: Sawyer, Jill; 24: King, Peter; and 26: Byrne, Alice. The dropdown is set against a light gray background.

**Assign Assisting Instructors**

Select the assisting instructor's ID from the dropdown list. Assisting instructors are listed in the order selected.



The screenshot shows a dropdown menu titled "Assisting Instructor(s)". The menu is open, displaying a list of instructor names and their IDs, identical to the first dropdown. The list items are: 20: Jones, Michael; 21: Miller, Sarah; 22: Johnson, Tom; 23ACLS: Sawyer, Jill; 23BLS: Sawyer, Jill; 23FA: Sawyer, Jill; 24: King, Peter; and 26: Byrne, Alice. The dropdown is set against a light gray background.

### Reassign Instructors

To change the lead instructor, select a different instructor ID from the dropdown list.

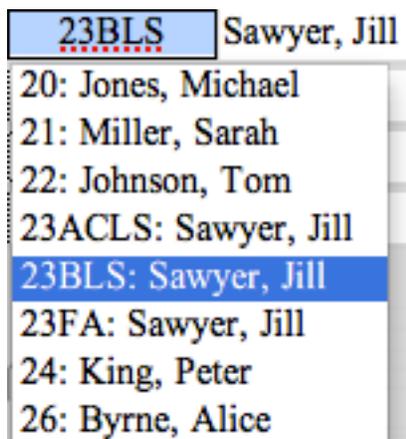
To change assisting instructors, remove any incorrect instructor assignments, and add correct instructors as appropriate.

### Instructor with Multiple Certifications

Instructors with multiple certifications are set up with an instructor ID for each certification, with several letters appended to the ID to indicate the type of certification. Choose the instructor ID with the appropriate certification for the course type.

#### **Example**

One of the assistant instructors for this class has multiple certifications.



### **Next Step**

After completing the work in the *Class Registration* screen, notify your Training Center of the planned class.

After receiving Training Center approval of the class, choose [Student Data Entry] to go directly to the *Student Data Entry* screen and start registering students.

## Notify Training Center

After creating a new class, use [Notify Training Center] in the *Class Registration* screen to notify your Training Center via e-mail of the planned class.

**Class Registration**

Main Menu ?

COPY Class

Class List

Roster - Front

**Notify Training Center**

E-mail Roster

Student Data Entry

**Notify Training Center by E-mail** CLASS REGISTRATION

Automatic E-mail Manual E-mail

Automatic e-mailing is available if you use Outlook/Outlook Express, MS Entourage/Mail or OS X Mail. ?

To: jsmith@TrainingHeadquarters.org

Cc:

Subject: Announcement of a Heartsaver CPR AED Class from Tom Johnson

This e-mail is to notify you of a planned class: Heartsaver CPR AED - Initial Training. This course will be taught with the following sub-options: Adult CPR AED and Child CPR AED.

The class will be held at Anytown Community Center, 125 Main St, Anytown, NY 10900. It is scheduled to start September 13, 2011 at 18:00 and end the same day at 21:00., for a total of 3.0 class hours.

A student-to-manikin ratio of 4:1 is planned with an estimated 16 students. Please send wallet cards to Students upon class completion.

The lead instructor is Tom Johnson, ID# 22, Exp. Date: 10-31-2013 and the class has no assisting instructors.

The manikins will be cleaned by Tom Johnson. Thank you for your prompt attention to this notification of a planned class.

Regards, Tom Johnson

If you are using TC Command v3 or higher, copy the text below and paste into the Class Creation from TCC Roster Tool Screen:  
 CourseType = Heartsaver CPR AED  
 TrainingType = Initial Training  
 SubOptions = Adult CPR AED and Child CPR AED

Place this e-mail in your outbox

Choose automatic e-mailing if you use Outlook, Outlook Express, MS Entourage, Mail, or OS X Mail.

Choose manual e-mailing if you will use another e-mail program.

Refer to E-mail a Roster on page 41 for additional information on e-mailing from the Roster Tool.

## Update an Existing Class

Find the class in the *Class Registration* screen, then correct information as needed.

## Mark a Class Submitted

After student results have been posted and the roster has been submitted, remove the class from the list of classes available for registering students.

Use the *Class/Skill Session Data* tab on the *Class Registration* screen, and choose **Yes** for Roster Submitted?

<b>Roster Submitted?</b>	<input checked="" type="radio"/>	Yes, if roster has been sent
	<input type="radio"/>	No, to keep class on list of available classes

Note: When the class is marked as submitted, the class record remains in the Roster Tool database, but is removed from the dropdown list used to register students in classes, to keep the information on the list current and the size of the list manageable.

## Copy and Change a Class

In the Roster Tool, you can copy an existing class, then change information as appropriate to create a new class.

Use the *Class Registration* screen, find the existing class, click [COPY Class], then change fields as needed.

**Example**

If the same instructors teach the same class at the same time in the same location on a regular basis, create the class once, then copy the class record and change the class dates to create the next class.

**Class Registration**

Class Number: BLS091311 (Required fields in yellow)

Course Type: Heartsaver CPR AED

Sub-Option (if Applicable): Adult CPR AED and Child CPR AED

**Class Location**

Location Name: Anytown Community Center

Address: 125 Main St

City: Anytown State: NY

Zip: 10900 Country: USA

**Class/Skill Session Data**

Dates: Start 09-13-2011 18:00, End 09-13-2011 21:00

Times: 18:00, 21:00

Total Class Hours: 3.0

Enrollment Counts: Estimated 16, Registered 15, Completed 14, Remediated 6

Initial Training (selected), Renewal Class, Online

Outside Students: Yes (selected), No

Student-to-Manikin Ratio: 4:1

Send Cards to: Students

Roster Submitted? No (selected)

1. Click [COPY Class]

**Class Registration**

Class Number: (Empty)

Course Type: Heartsaver CPR AED

Sub-Option (if Applicable): Adult CPR AED and Child CPR AED

**Class Location**

Location Name: Anytown Community Center

Address: 125 Main St

City: Anytown State: NY

Zip: 10900 Country: USA

**Class/Skill Session Data**

Dates: Start 09-13-2011 18:00, End 09-13-2011 21:00

Times: 18:00, 21:00

Total Class Hours: 3.0

Enrollment Counts: Estimated 16, Registered 0, Completed 0

Initial Training (selected), Renewal Class, Online

Outside Students: Yes, No (selected)

Student-to-Manikin Ratio: 4:1

Send Cards to: Instructor

Roster Submitted? No (selected)

2. Create new class number if applicable

3. Change class dates.

4. Enrollment counts will be cleared automatically

5. Check mailing destination for wallet cards.

**Instructor Data**

Lead Instructor ID & Name: 22 Johnson, Tom

Exp. Date: 10-31-13

Assisting Instructor(s): 0

Delete?

6. Check lead instructor and assign assisting instructors if applicable.

## List Classes

This list of classes can be reviewed on the screen or printed, and contains the following data for each class on the report:

- Course type
- Class number if applicable
- Start date
- Teaching location
- Lead instructor's name
- Enrollment counts
- Class status (submitted or still on dropdown list)

From the *Class Registration* screen, click [Class List] for a list of all classes in the Roster Tool.

Class List - Sorted by Latest Start Date										PRINT
Start Date	Course Type / Class #	Class Location		Instr.	CLASS REGISTRATION					
12/12/11	ACLS Provider <a href="#">Detail</a> ACLS121211	Anytown Hospital 200 River Rd		Sawyer, Jill Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		10	8	0	0				<input type="radio"/> Yes	<input checked="" type="radio"/> No
11/05/11	Heartsaver First Aid <a href="#">Detail</a> FA110511	Coaches Association 150 High St		King, Peter Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		20	15	0	0				<input type="radio"/> Yes	<input checked="" type="radio"/> No
10/16/11	Family and Friends CPR <a href="#">Detail</a> BLS101611	Anytown Community Center 125 Main St		Byrne, Alice Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		20	18	0	0				<input type="radio"/> Yes	<input checked="" type="radio"/> No
09/13/11	Heartsaver CPR AED <a href="#">Detail</a> BLS091311	Anytown Community Center 125 Main St		Johnson, Tom Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		16	15	14	6				<input type="radio"/> Yes	<input checked="" type="radio"/> No
08/26/11	Heartsaver CPR in Schools <a href="#">Detail</a> BLS082611roomA	Board of Education 25 High St		Jones, Michael Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		24	24	24	3				<input checked="" type="radio"/> Yes	<input type="radio"/> No
08/26/11	Heartsaver CPR in Schools <a href="#">Detail</a> BLS082611roomB	Board of Education 25 High St		Miller, Sarah Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		24	21	21	5				<input checked="" type="radio"/> Yes	<input type="radio"/> No
08/20/11	Heartsaver First Aid CPR AED <a href="#">Detail</a> FA082011	Coaches Association 150 High St		Sawyer, Jill Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		12	10	10	2				<input checked="" type="radio"/> Yes	<input type="radio"/> No
08/13/11	BLS for HealthCare Providers <a href="#">Detail</a> BLS081311	Anytown Police Station 5 High St		Higgins, Marcia Anytown	Estimated	Registered	Completed	Remediated	Roster Submitted?	
		15	16	16	1				<input checked="" type="radio"/> Yes	<input type="radio"/> No

To review the list of classes, use the right-hand scroll bar. To review details for any class on the report, click the [Detail] button by the class to display that class in the *Class Registration* screen.

To print the list of classes, click [PRINT] in the Class List, then click [OK].

### ***Sort Classes for Class List***

Classes on the Class List report are shown in order by start date, with the latest dates shown first.

To list the classes in a different order, click {Sort Classes} at the top of the screen and specify the order for the list.

See Sort on page 54.

## Find Classes

All classes in the Roster Tool database are listed in the order they were created.

You can use the left and right arrows in the book icon at the top of the screen to look at each class in turn, or you can use the FileMaker Pro FIND capability to search for classes.

To search for a class or group of classes, click {Find} at the top of the *Class Registration* screen, specify information to describe the class in one or more fields, then click {Perform Find}. After reviewing the selected class or group of classes, click Show All Classes under {Classes} on the TCC Roster Tool menu bar in the top line of the screen to access all the classes in the Roster Tool again. See Find on page 51.

1. Click {Find}
2. Specify search criteria
3. Click {Perform Find}
4. Check number of records found
5. Use flipbook and slide bar to review records in found set
6. To see all records again, choose Classes, then Show All Classes

**Examples with one field**

To find all classes taught at a certain location, use the Location Name field to specify the location.

**Location Name**

To find all Heartsaver classes with a specific set of sub-options, use the Course Type field to specify the Heartsaver course type, and the Heartsaver Sub-Option field to specify the sub-option.

**Course Type**   
**Sub-Option (if Applicable)**

To find a class by start date, enter the specific date in the start date field.

To find all classes taught in a particular month, enter the month, using the MM/YYYY format, in the start date field.

To find classes taught before a certain date

**Start**

To find classes taught after a certain date

**Start**

To find all classes taught in the first six months of the year, use the start date field to specify a date range.

**Start**

**Examples with several fields**

To find all classes of a particular course type taught at a specific location, use the course type field and the location field.

Course Type	Heartsaver CPR in Schools
Sub-Option (if Applicable)	
Location Name	Board of Education

To find all classes with a particular instructor as lead or assisting instructor, use both instructor ID fields to specify that instructor.

Lead Instructor ID & Name	
21	
Assisting Instructor(s)	
21	

To find all classes taught by a particular instructor during a specific time period, use both instructor ID fields, and also use a date range in the start date field.

**Delete a Class**

Use the *Class Registration* screen with the class record displayed.

Click {Delete Class} at the top of the screen, then [Delete] to permanently delete the displayed class from the Roster Tool database.

## Students

After classes have been created, students can be registered in the classes.

When registering a student, include name, address, and contact information. For renewal classes, confirm prior certification.

You can pre-register students for a class, and post student results after the class is taught, or else perform both these tasks after the class has been taught.

From the Roster Tool main menu, or from the *Class Registration* screen, choose [Student Data Entry] to:

- Register a student in a class
- Print a sign-in sheet
- Post student results
- Enter date of successful remediation
- Print a roster (back)
- Review student information
- Change student information

The screenshot displays the 'INSTRUCTOR ROSTER TOOL' interface. At the top, there are three navigation buttons: 'Class Registration', 'Student Data Entry', and 'General Setup (Required)'. A curved arrow points from 'Student Data Entry' to the main form area. To the right, a 'Class Registration' sidebar contains buttons for 'Main Menu', 'COPY Class', 'Class List', 'Roster - Front', 'Notify Training Center', 'E-mail Roster', and 'Student Data Entry'. The main form is titled 'Student Data Entry' and includes fields for: Last Name, First Name, Address, City, State, Country, Zip, Phone-work/home, E-mail Address, Employee ID, Organization, Occupation, and Department. Below these fields is a section for class assignment with fields for Course Type, Location, and Start Date, and a link '[CLICK HERE] to assign student to class'. At the bottom, there are tabs for 'Preparation' and 'Completion'. Under 'Preparation', there are radio buttons for 'Initial Training', 'Renewal Class', and 'Online'. Under 'Completion', there are radio buttons for 'If renewing, current card valid?' and 'Materials sent?'. A help icon (?) is located at the bottom right of the form.

## Register a New Student

Use the *Student Data Entry* screen to register a student in a class. Choose {New Student} at the top of the screen and complete all required yellow fields, and other fields as appropriate. Refer to the tool tips on the screen for information about individual fields.

The fields in the top half of the *Student Data Entry* screen describe the student.

Student Data Entry	
Last Name	Callahan Ext. <input type="text"/>
First Name	Elizabeth MI <input type="text"/>
Address	178 Grand Ave
City	Anytown
State	MI Country USA
Zip	10900 plus 4 <input type="text"/>
Phone -work/home	<input type="text"/> (845) 555-1212
E-mail Address	E.Callahan@anytownusa.com
Employee ID	<input type="text"/>
Organization	<input type="text"/>
Occupation	<input type="text"/>
Department	<input type="text"/>

## Class Assignment

Use the [CLICK HERE] field to choose the class, which registers the student in the class.

<a href="#">[CLICK HERE] to assign student to class</a>	
Course Type	Class# ACLS121211 - ACLS Provider @ Milltown Hospital - 12/12/2011 at 0900 Hours
	Class# BLS091311 - Heartsaver CPR AED @ Milltown Community Center - 9/13/2011 at 1800 Hours
Location	Class# BLS101611 - Family and Friends CPR @ Milltown Community Center - 10/16/2011 at 1400 Hours
Start Date	<input type="text"/>

**Preparation Tab**

Use the *Preparation* tab in the *Student Data Entry* screen for class tasks specific to the individual student.

**Preparation**      **Completion**

Type of training?  Initial Training    Renewal Class    Online

If renewing, current card valid?  Yes    No

Materials sent?  Yes    No

---

eLearning?  Yes

**Completion Tab**

Use the *Completion* tab in the *Student Data Entry* screen to post student results after the class has been taught.

**Preparation**      **Completion**

OverAll Grade **C**   Test Score    Remediated on   


---

ACLS and/or PALS Station Grades:

MegaCode    Adult CPR/AED    Child/Infant CPR

---

Skill Session for eLearning Student:

Date     Start Time    End Time

---

Notes

Note: If registering students before the class is taught, then change the OverAll Grade from the default of **C** for Complete to **I** for Incomplete, until the student results are available.

**eLearning**

If a student presents an online completion certificate, register the student in a class with an online course type, use the fields at the bottom of the *Preparation* tab to enter the eLearning information, and use the *Completion* tab to post the student's overall grade.

**Remediation**

When a student requires remediation, use the *Completion* tab to set his or her overall grade to **I** for Incomplete. Then after the student successfully completes his or her remediation, change the overall grade to **C** for Complete, and enter the date of the successful remediation.

**Example**

This new student completed remediation successfully.

The image shows two rows of a form. The top row has 'OverAll Grade' with a dropdown menu showing 'I', 'Test Score' with an empty input field, and 'Remediated on' with an empty date input field. The bottom row has 'OverAll Grade' with a dropdown menu showing 'C', 'Test Score' with an empty input field, and 'Remediated on' with the date '09-20-11' entered. A black arrow points from the 'I' dropdown to the 'C' dropdown. A black circle highlights the date '09-20-11'.

## Print Sign In Sheet

After registering all students in the class, you can print a sign in sheet to use on the day of the class.

Use the *Student Data Entry* screen to select one of the students in the class, choose [Sign-In Sheet], then click [PRINT] and [OK].

The sign in sheet includes the class number if applicable, course type, sub-options if applicable, lead instructor, teaching location and the class starting date.

Each student's name, address, home phone, and e-mail are given, with room for the student's signature.

**Student Data Entry**

Main Menu ?

COPY Student

**Sign-In Sheet**

Roster - Back

Class Registration

---

**Sign-In Sheet for Class# BLS091311 - Heartsaver CPR AED Class**

Adult CPR AED and Child CPR AED  
 Lead Instructor: Tom Johnson, Location: Anytown Community Center  
 Class starting on 9/13/2011, beginning at 1800 hours

PRINT ?

**STUDENT DATA ENTRY** ?

1. Armstrong, Mark 445 Summit Ave, Anytown, MI 10900 (845) 555-1212 M.Armstrong@anytownusa.com	_____
2. Bossert, Mary 115 Center St, Anytown, MI 10900 (845) 555-1212 M.Bossert@anytownusa.com	_____
3. Callahan, Elizabeth 178 Grand Ave, Anytown, MI 10900 (845) 555-1212 E.Callahan@anytownusa.com	_____
4. Drayton, Hugh 818 Broad St, Anytown, MI 10900 (845) 555-1212 H.Drayton@anytownusa.com	_____
5. Farkas, Muriel 61 Walnut Ave, Anytown, MI 10900 (845) 555-1212 M.Farkas@anytownusa.com	_____
6. Glasser, Jim 250 River Rd, Anytown, MI 10900 (845) 555-1212 J.Glasser@anytownusa.com	_____
7. Hunter, Anne 77 Woodside Ct, Anytown, MI 10900 (845) 555-1212 A.Hunter@anytownusa.com	_____
8. Keyes, Barbara 951 High St, Anytown, MI 10900 (845) 555-1212 B.Keyes@anytownusa.com	_____
9. Mauro, Joan 27 Linden Ave, Anytown, MI 10900 (845) 555-1212 J.Mauro@anytownusa.com	_____
10. Meyer, Katherine 22 Chestnut St, Anytown, MI 10900 (845) 555-1212 K.Meyer@anytownusa.com	_____
11. Miller, Paul 14 Sunset Blvd, Anytown, NY 10900 (845) 555-1212 P.Miller@anytownusa.com	_____
12. Potter, Bill 2551 Concord St, Milltown, MI 10900 (845) 555-1212 W.Potter@anytownusa.com	_____
13. Smith, Mary 447 Summit Ave, Anytown, NY 10900 (845) 555-1212 M.Smith@anytownusa.com	_____
14. Soranno, Peter 54 Lake Terr, Anytown, MI 10900 (845) 555-1212 P.Soranno@anytownusa.com	_____
15. Weissman, Jennifer 11 Ivy Ln, Anytown, MI 10900 (845) 555-1212 J.Weissman@anytownusa.com	_____

## **Update Student Information**

To update the information in a student record, use the *Student Data Entry* screen to find the record, click in the incorrect or empty field, and add or change the information.

### ***Next Step***

Click [Class Registration] to go to the *Class Registration* screen and e-mail the roster.

After all students have been registered, all student results have been posted, and all remediation has been completed, you can choose [Class Registration] to go directly to the *Class Registration* screen and e-mail the class roster to the Training Center.

## **Register an Existing Student**

Students in the Roster Tool can be registered in other classes. The Roster Tool has two methods for handling this: use the same student record and change the class, or else duplicate the student record and change the class in the new copy of the student record. In other words, a student can be registered in one class at a time, or a student record can be duplicated so a student can be registered in more than one class at the same time.

### ***One Record for the Student***

After a student has completed a class and the roster has been submitted to the Training Center, the student can be registered in another class by changing the class in the student record.

Note: Do not change the class in a student record if you will need to print or e-mail information about the completed class again at any point in the future, or if you will need to refer to that information in the Roster Tool database.

**Example**

A student has taken a basic CPR class, and now is returning to renew.

Find the student's record for the earlier class and change the class to the renewal class. The Roster Tool has one record for this student, with the new class.

### Student Data Entry

Last Name	<input type="text" value="Callahan"/>	Ext.	<input type="text"/>
First Name	<input type="text" value="Elizabeth"/>	MI	<input type="text"/>
Address	<input type="text" value="178 Grand Ave"/>		
City	<input type="text" value="Anytown"/>		
State	<input type="text" value="MI"/>	Country	<input type="text" value="USA"/>
Zip	<input type="text" value="10900"/>	plus 4	<input type="text"/>
Phone -work/home	<input type="text"/>	<input type="text" value="(845) 555-1212"/>	
E-mail Address	<input type="text" value="E.Callahan@anytownusa.com"/>		
Employee ID	<input type="text"/>		
Organization	<input type="text"/>		
Occupation	<input type="text"/>		
Department	<input type="text"/>		

**[CLICK HERE] to assign student to class**

Course Type	<input type="text" value="Heartsaver CPR AED"/>	<small>Adult CPR AED and Child CPR AED</small>
Location	<input type="text" value="Anytown Community Center"/>	
Start Date	<input type="text" value="09-13-2011"/>	

Course Type	<input type="text" value="Heartsaver CPR AED"/>	<small>Adult CPR AED and Child CPR AED</small>
Location	<input type="text" value="Anytown Community Center"/>	
Start Date	<input type="text" value="09-10-2013"/>	

Two years later

### Duplicate Records for the Student

A student can be registered in another class by copying the student record and changing the class.

#### Example

A student has taken a CPR class, and now is returning to take a First Aid class.

Find the student’s record for the earlier class, click [COPY Student], and change the class to the first aid class. The Roster Tool now has a record of both classes taken by this student.

**Student Data Entry**

Last Name: Potter Ext.

First Name: Bill MI

Address: 2551 Concord St

City: Anytown

State: MI Country: USA

Zip: 10900 plus 4

Phone - work/home: (845) 555-1212

E-mail Address: W.Potter@anytownusa.com

Employee ID:

Organization:

Occupation:

Department:

**[CLICK HERE] to assign student to class**

Course Type: Heartsaver First Aid  
Adult First Aid ONLY

Location: Coaches Association

Start Date: 11-05-2011

Main Menu ?

COPY Student

Sign-In Sheet

Roster - Back

Class Registration

1. Click [COPY Student] to duplicate student record

2. Duplicate record is created

3. Register student in another class, using duplicate record

***Example***

To manage the paperwork for a weekend of classes, create all the classes.

Register all the students for the first class, post student results, and send the roster for the first class.

Then change the class for each of the students, update the student results as needed, and send the roster for the second class.

At the end of the weekend, the Roster Tool will have one record for each student, showing them all registered in the last class.

***Register Students from Same Organization***

If all the students in the class are from the same organization, and wish to keep personal addresses and phone numbers confidential, use the organization's information in place of the student address and contact information.

Create one student record with a student name, the organization's address and contact information, and the class.

Then click [COPY Student] and change the student's name to add the next student in the class, leaving the organization's information and the class the same.

Note: Update the OverAll Grade on the *Completion* tab as needed after duplicating the records.

**Example**

A class of police officers could use the police station address and contact information to protect individual officers' privacy.

The image shows two screenshots of the 'Student Data Entry' form. The first screenshot shows the form with the following data: Last Name: Boyle, First Name: Richard, Address: 5 High St, City: Anytown, State: MI, Country: USA, Zip: 10900, Phone: (845) 555-1212, E-mail: info@AnytownUSAPolice.com. The second screenshot shows the same form with the following data: Last Name: Guttman, First Name: Howard, Address: 5 High St, City: Anytown, State: NY, Country: USA, Zip: 10900, Phone: (845) 555-1212, E-mail: info@AnytownUSAPolice.com. Both screenshots have a 'Main Menu' button with a question mark icon, a 'COPY Student' button, a 'Sign-In Sheet' button, a 'Roster - Back' button, and a 'Class Registration' button. A callout box at the bottom of each screenshot says '[CLICK HERE] to assign student to class'. The callout boxes are numbered 1 through 6, describing the steps to duplicate a student record.

1. Register first student in class
2. Use police station address
3. Click [COPY Student] to duplicate student record
4. Duplicate record is created
5. Change student name
6. Click [COPY Student] again to repeat this process

## Find Students

You can use the FileMaker Pro FIND capability to search for a particular student or group of students.

In the *Student Data Entry* screen, click {Find} at the top of the screen.

Use the fields in the screen to specify the student(s) you want to find, then click {Perform Find}. After reviewing the student record(s), click Show All Students under {Students} on the TCC Roster Tool menu bar in the top line of the screen to access all students in the Roster Tool again. See Find on page 51.

The image contains four numbered callouts pointing to specific elements in the software interface:

- 1. Click {Find}**: Points to a magnifying glass icon labeled "Find" at the top of the screen.
- 2. Specify search criteria**: Points to the "Student Data Entry" form where the "Last Name" field contains "cal". Other fields like "First Name", "Address", "City", "State", "Country", and "Zip" are also visible.
- 3. Click {Perform Find}**: Points to a button labeled "Perform Find" with a magnifying glass icon.
- 4. After reviewing selected record, choose Students, then Show All Students**: Points to the "Students" menu, which is open and shows the "Show All Students..." option highlighted.

### **Examples**

Use one or more of the student information fields to specify the student or group of students.

To find all students living in the same town, use the zip code or city field to specify the town.

If you're not sure of the spelling of a name, enter only the first few letters, or enter \* in place of some of the letters.

First Name

will find all students named Alec and Alex.

Last Name

will find all students named Jonson, Johnson, Johnston, and Johanson.

If you're sure of everything except one letter or number, use @ to replace the letter, or # in place of the number.

Last Name

will find all students named Smith and Smyth.

### **Find Student by Class**

If the class is NOT marked as submitted, then use the field labeled [[CLICK HERE](#)] to assign student to class to select the class from the dropdown list.

If the class IS marked as submitted, then do not use the dropdown list of classes to find a student. Instead use the location, course type, and start date fields in the *Student Data Entry* screen to find a student in a particular class.

### **Sort Students**

Students are stored in the order added to the Roster Tool database. To change the order of student records, click {Sort Students} at the top of the screen and specify the order for the student records. See Sort on page 54.

### **Delete a Student**

Use the *Student Data Entry* screen with the student record displayed.

Click {Delete Student}, then [Delete] to permanently delete the displayed student from the Roster Tool database.

# Rosters

After students have been registered in classes, student results posted, and all remediation completed, rosters can be printed and/or e-mailed for submission to the Training Center, so student cards can be printed.

Note: E-mail rosters can be submitted from the TC Command Roster Tool or the WorldPoint ONE Roster Tool to Training Centers using TC Command Management (V3 or higher) or WorldPoint ONE (V2.1 or higher).

## Print a Roster

Print the front and back of the roster separately.

### Front of Roster

The front of the class roster can be printed after the class is created.

Use the *Class Registration* screen to select the correct class, then choose [Roster - Front], click [PRINT] and [OK].

American Heart Association Emergency Cardiovascular Care Program  
Heartsaver CPR AED  
Course Roster

PRINT CLASS REGISTRATION

Class# BLS091311 Lead Instructor Tom Johnson

**Heartsaver CPR AED**  
Course SubOptions:  
Adult CPR AED and Child CPR AED

Status Renewal Date 10-31-2013  
Training Center Training Headquarters  
Training Center ID# NY00000  
Training Site Name (if applicable)  
Course Location Anytown Community Center  
Address 125 Main St  
City, State ZIP Anytown, NY 10900

Initial Training  Renewal Class  Online

Class Start Date/Time 09/13/2011 1800    Class End Date/Time 09/13/2011 2100    Total Hours 3.0

Student-to-Manikin Ratio 4:1    Number of Cards Issued    Cards Mailed to Students

Assisting Instructors / Specialty Faculty (Attach copy of instructor cards for instructors aligned with other Training Centers)					
Name	Instr. Card Exp. Date	Module/Station	Name	Instr. Card Exp. Date	Module/Station
1.			7.		
2.			8.		
3.			9.		
4.			10.		
5.			11.		
6.			12.		

I verify that this information is accurate and truthful and that it may be confirmed. This course was taught in accordance with national guidelines.

Signature of Course Director/Lead Instructor/Skills Evaluator \_\_\_\_\_ Date \_\_\_\_\_

### Back of Roster

The back of the class roster can be printed after student results have been posted.

In the *Student Data Entry* screen, confirm a student in the correct class is displayed, or else select a student in the correct class, then choose [Roster - Back] and click [PRINT] and [OK].

**Student Data Entry**

[Main Menu](#) ?

[COPY Student](#)

[Sign-In Sheet](#)

[Roster - Back](#)

[Class Registration](#)

**Student Roster for Class# BLS091311 - Heartsaver CPR AED Class**

Adult CPR AED and Child CPR AED  
 Lead Instructor: Tom Johnson, Location: Anytown Community Center  
 Class starting on 9/13/2011, beginning at 1800 hours

[PRINT](#)

**STUDENT DATA ENTRY**

Name (Online Completion # if applicable) Email	Address	Phone (home)	Course Completed	Remediation Completed
1. Armstrong, Mark M.Armstrong@anytownusa.com	445 Summit Ave Anytown, MI 10900	(845) 555-1212	C	
2. Bossert, Mary M.Bossert@anytownusa.com	115 Center St Anytown, MI 10900	(845) 555-1212	C	09-20-11
3. Callahan, Elizabeth E.Callahan@anytownusa.com	178 Grand Ave Anytown, MI 10900	(845) 555-1212	C	
4. Drayton, Hugh H.Drayton@anytownusa.com	818 Broad St Anytown, MI 10900	(845) 555-1212	C	09-20-11
5. Farkas, Muriel M.Farkas@anytownusa.com	61 Walnut Ave Anytown, MI 10900	(845) 555-1212	C	
6. Glasser, Jim J.Glasser@anytownusa.com	250 River Rd Anytown, MI 10900	(845) 555-1212	C	09-20-11
7. Hunter, Anne A.Hunter@anytownusa.com	77 Woodside Ct Anytown, MI 10900	(845) 555-1212	C	
8. Keyes, Barbara B.Keyes@anytownusa.com	951 High St Anytown, MI 10900	(845) 555-1212	C	09-20-11
9. Mauro, Joan J.Mauro@anytownusa.com	27 Linden Ave Anytown, MI 10900	(845) 555-1212	C	
10. Meyer, Katherine K.Meyer@anytownusa.com	22 Chestnut St Anytown, MI 10900	(845) 555-1212	C	
11. Miller, Paul P.Miller@anytownusa.com	14 Sunset Blvd Anytown, NY 10900	(845) 555-1212	C	
12. Potter, Bill W.Potter@anytownusa.com	2551 Concord St Milltown, MI 10900	(845) 555-1212	C	09-20-11
13. Smith, Mary M.Smith@anytownusa.com	447 Summit Ave Anytown, NY 10900	(845) 555-1212	I	
14. Soranno, Peter P.Soranno@anytownusa.com	54 Lake Terr Anytown, MI 10900	(845) 555-1212	C	09-20-11
15. Weissman, Jennifer J.Weissman@anytownusa.com	11 Ivy Ln Anytown, MI 10900	(845) 555-1212	C	

### Next Step

After a roster is printed, e-mail it to the Training Center, if appropriate, and then use the *Class Registration* screen to mark the class as submitted. See Mark a Class Submitted on page 19.

## E-mail a Roster

Before using the Roster Tool to e-mail a roster, confirm that you have a functional e-mail program on the same computer as the Roster Tool.

The front and back of the roster can be e-mailed to the Training Center after the student results have been posted. Send the entire roster by e-mail, using the automatic process or the manual process.

Training Centers can recreate the class in TC Command Management or WorldPoint ONE from the class information in the e-mail, then import the student list attachment and print the student cards.

Use the *Class Registration* screen to select the correct class, then choose [E-mail Roster].

**Class Registration**

**Submit Roster by E-mail**

**CLASS REGISTRATION**

**Automatic E-mail** | **Manual E-mail**

Automatic e-mailing is available if you use Outlook/Outlook Express, MS Entourage/Mail or OS X Mail.

To: rrichardson@TrainingHeadquarters.org

Cc:

Subject: Heartsaver CPR AED Class# BLS091311 Electronic Roster from Tom Johnson

Attachments ... Macintosh HD/Users/Johnson/Documents/TC Command Roster Tool/Attachments/BLS22\_091311\_1800.tab

This e-mail is to submit data for a class:  
 Class# BLS091311 - Heartsaver CPR AED - Initial Training.  
 This course was taught with the following sub-options:  
 Adult CPR AED and Child CPR AED.

The class was held at Anytown Community Center, 125 Main St, Anytown, NY 10900.  
 It started on September 13, 2011 at 18:00 and ended the same day at 21:00., for a total of 3.0 class hours.

A student-to-manikin ratio of 4:1 was established. Please send 14 wallet card(s) to Students.

The lead instructor was Tom Johnson, ID# 22, Exp. Date: 10-31-2013 and the class has no assisting instructors.

The manikins were cleaned by Tom Johnson. Thank you for your prompt attention to this class submittal.

Regards, Tom Johnson

If you are using TC Command v3 or higher, copy the text below and paste into the Class Creation from TCC Roster Tool Screen:  
 CourseType = Heartsaver CPR AED  
 TrainingType = Initial Training  
 SubOptions = Adult CPR AED and Child CPR AED

**Place this e-mail in your outbox**

Note: Training centers using TC Command Management V3 or later may request the list of class data be included in the body of the email to facilitate recreating the class in TC Command Management. See List of Class Data on page 60.

## ***Automatic E-mail***

Before using the automatic process, confirm the following:

- The Training Center e-mail address has been added in General Setup.
- You are using Outlook, Outlook Express, MS Entourage, Mail, or OS X Mail.

Choose the *Automatic E-mail* tab in the roster e-mail screen.

Review the class information in the roster e-mail.

Click [Place this e-mail in your outbox] to send the roster e-mail, along with the automatically attached student list, to your e-mail program.

Note: If the following message is displayed:

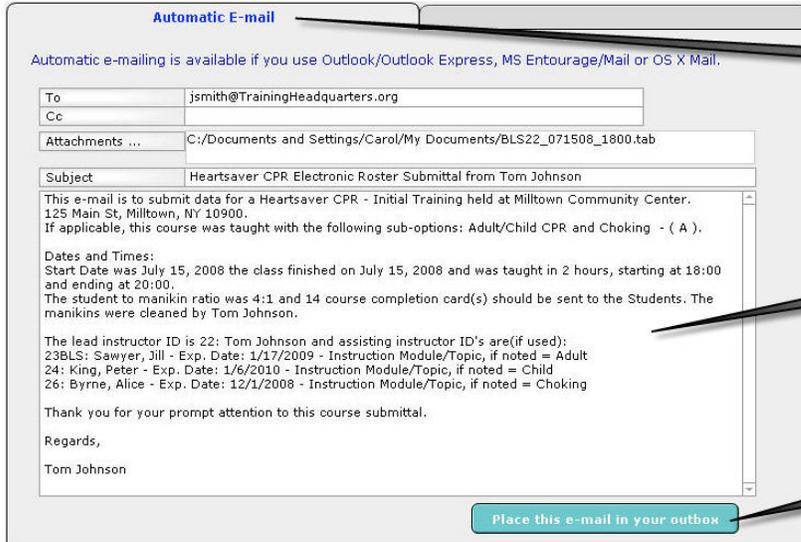


choose [Send] to allow communication from the Roster Tool to your e-mail program.

Then, depending on the settings in your e-mail program, you may need to check the outgoing mailbox and send the e-mail, if you want it to go out right away.

**Example**

If you are using MS Outlook Express, then choose the *Automatic E-mail* tab.



1. Choose the Automatic E-mail tab

2. Review class information

3. Click here



4. Click [OK] if this message is displayed



5. Click [Send] if this message is displayed



6. Check your e-mail outbox, and send roster e-mail if necessary

### Manual E-mail

Use the manual process if you are unable to send e-mails via Outlook, Outlook Express, MS Entourage, Mail, or OS X Mail.

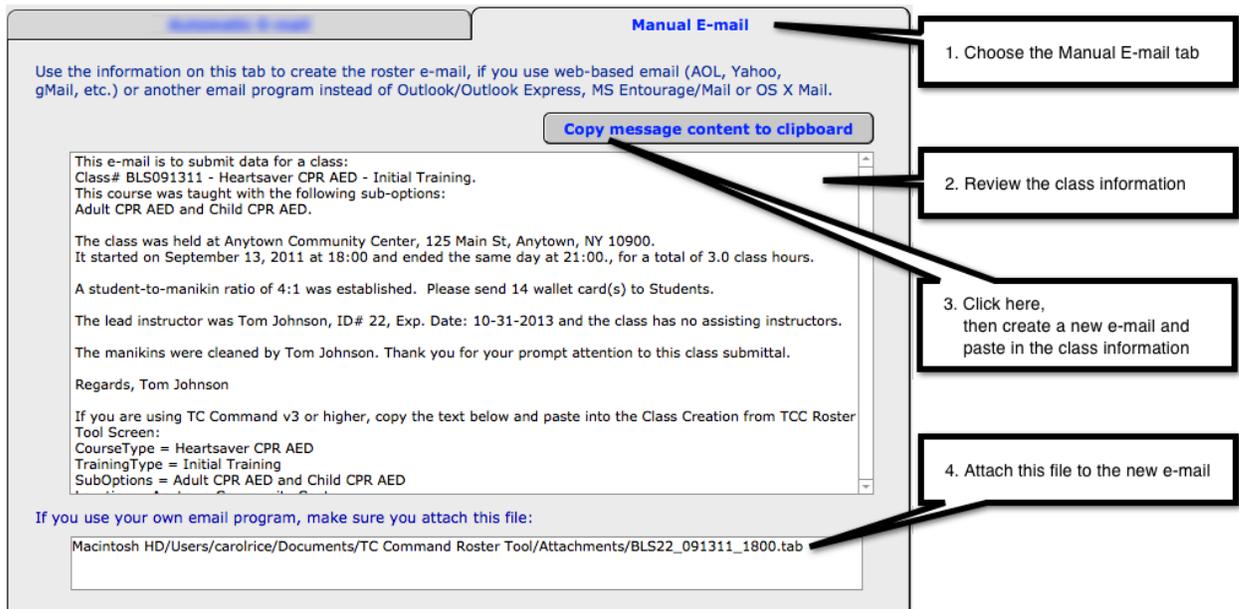
1. Choose the *Manual E-mail* tab in the roster e-mail screen.
2. Review the class information to confirm this is the correct class to submit.
3. Click [Copy message content to clipboard] to copy the text of the e-mail, and then paste it into a new e-mail in your e-mail program.
4. Attach the student list to the e-mail.

Browse to find the list of students in the class. The list, automatically generated by the Roster Tool, is located in the Attachments folder within the TC Command Roster Tool folder in Documents or My Documents on the local hard drive (C:\). The filename includes the class type, lead instructor ID, start date, and start time, in this format:

TYPEID\_MMDDYY\_HHMM

where TYPE is the class type (BLS, ACLS, PALS, FA, MISC, or ONLINE), ID is the lead instructor ID, MMDDYY is the class start date, and HHMM is the class start time.

5. Send the e-mail to your TC, with the class type and lead instructor name in the subject line.



**Example**

1. If you are using AOL, then choose the *Manual E-mail* tab in the Roster Tool.
2. Make sure the correct class is described on the *Manual E-mail* tab.
3. In AOL, create a new e-mail. In the Roster Tool, use the [Copy message content to clipboard] button to copy the class information. In AOL, paste the class information into the e-mail.
4. Use the information at the bottom of the *Manual E-mail* tab to find the list of students, and attach it to the new e-mail in AOL.
5. In AOL, add the Training Center e-mail address and the subject line, and send the new e-mail.

**Next Step**

After a roster has been e-mailed to the Training Center (and printed if applicable), then use the *Class Registration* screen to mark the class as submitted. See Mark a Class Submitted on page 19.

## Appendix

Refer to this appendix to enhance your understanding and use of the Roster Tool.

### User Documentation

Tool tips and help screens are provided throughout the Roster Tool, and the FileMaker Pro keystroke commands may be useful to you.

#### *Tool Tips*

The Roster Tool has a tool tip for every field and button. Place your cursor over the field or button to display the tool tip briefly.



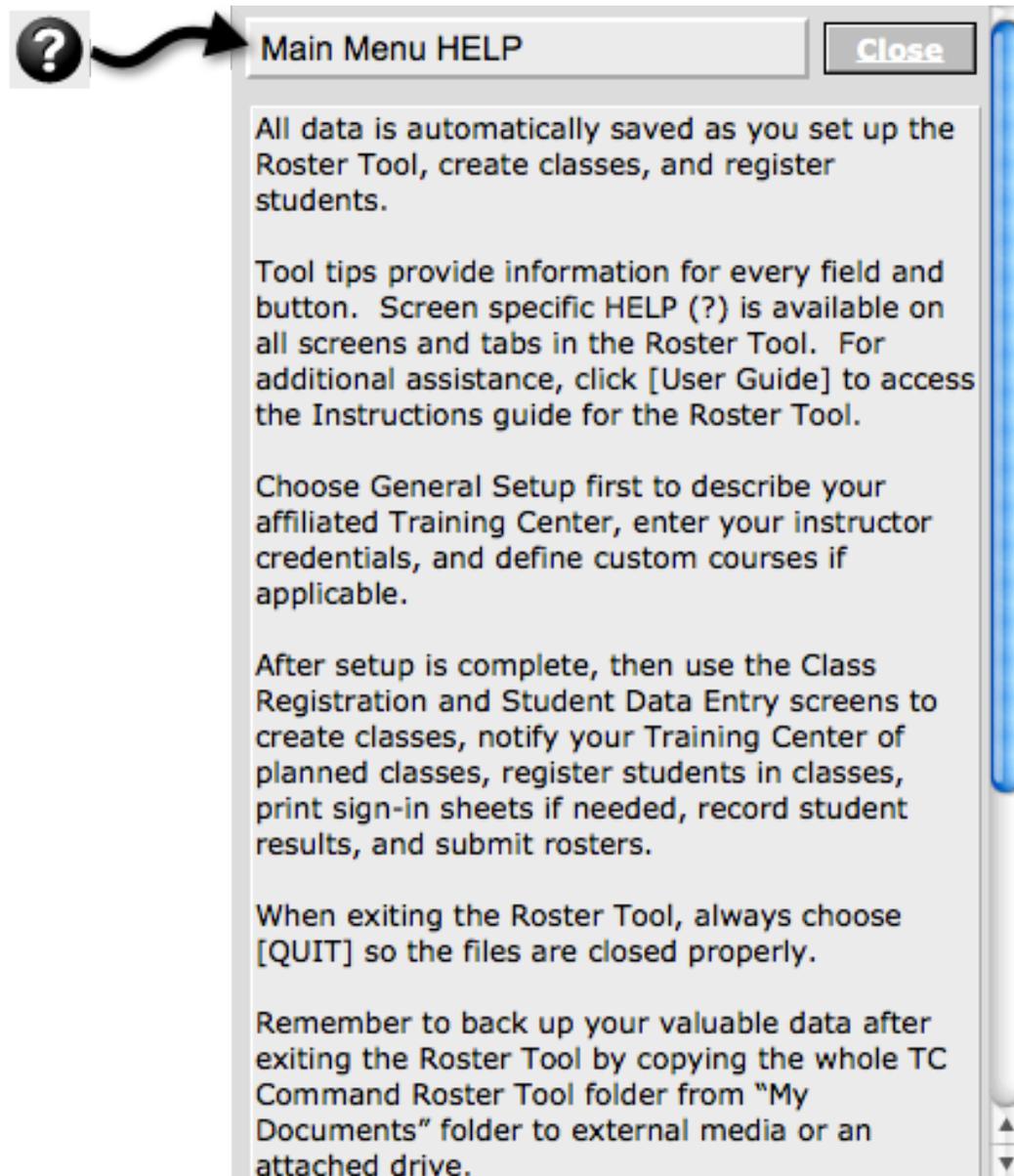
**User Guide**



**Click here to see the User Guide for the TC Command Roster Tool.**

## Screen Help

The Roster Tool has a help screen for each screen and tab. Click the Help icon (?) to display the help screen, scroll if necessary, then click [Close] to return to the Roster Tool screen.



## ***Keyboard Shortcuts***

After learning to use the Roster Tool, you may prefer these keyboard shortcuts.

<b>Key(s)</b>	<b>Action</b>
Ctrl ' (single quote)	Fill this field with data from last record entered
Ctrl F	Find
Ctrl J	Show all records
Ctrl N	Add new record
Ctrl S	Sort
Ctrl up arrow	Move to next record
Ctrl down arrow	Move to previous record
Tab	Move to next field
Shift Tab	Move to previous field
Enter	Perform find

On a Macintosh keyboard, the Ctrl key is the four-leaf clover.

When using a two key shortcut, hold down the first key while pressing the second key, then release both keys.

## Using an Application Based on FileMaker® Pro

The Roster Tool stores information in a FileMaker Pro database.

### Required Fields

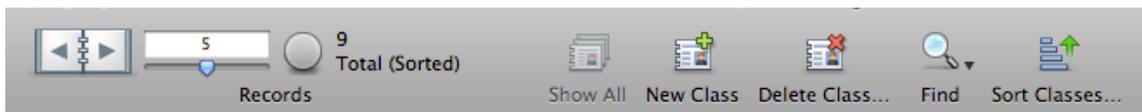
Fields with yellow backgrounds are required for full Roster Tool functionality.

Note: When registering a new student in the *Student Data Entry* screen, the student's name and class fields must be completed, plus assigning the student to a class, before attempting any other task.

Last Name	<input type="text"/>
First Name	<input type="text"/>

### Status Area

The status area above the *Class Registration* and *Student Data Entry* screens provides additional capabilities, and changes depending on displayed screen and user actions.



### Reviewing Records

Class and student records are stored in the order entered.

The status area at the top of the *Class Registration* and *Student Data Entry* screens provides capabilities to scroll through class and student records.



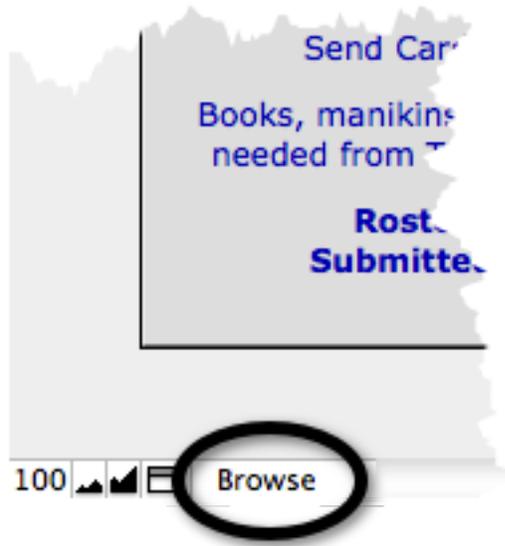
Click the arrows on the pages of the book icon to display the records one by one.

Use the slide bar next to the book icon to move quickly through the records.

### ***Find and Browse Modes***

You will do all your work in the Roster Tool in the Browse mode, except when finding records.

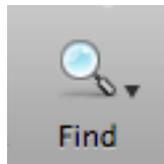
Always add and review records in Browse mode. Check the mode in the last line of the screen, and do not attempt to add records in Find mode.



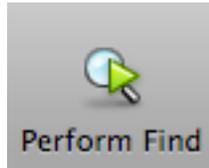
## Find

FileMaker Pro software provides extensive search capabilities for finding individual students, groups of students, specific classes, and groups of classes.

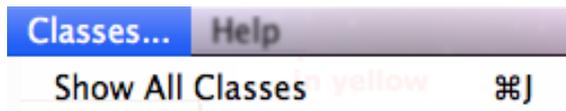
1. Click {Find} at the top of the *Class Registration* or *Student Data Entry* screen.



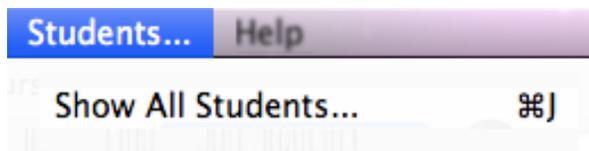
2. Specify the records to find by entering and/or selecting data in the field(s).
3. Click {Perform Find} in the status area at the top of the screen.



4. Review the selected record(s).
5. To access all the class or student records in the Roster Tool database again, use the TCC Roster Tool menu bar in the top line of the screen. Choose {Classes}, then Show All Classes, or



choose {Students}, then Show All Students.



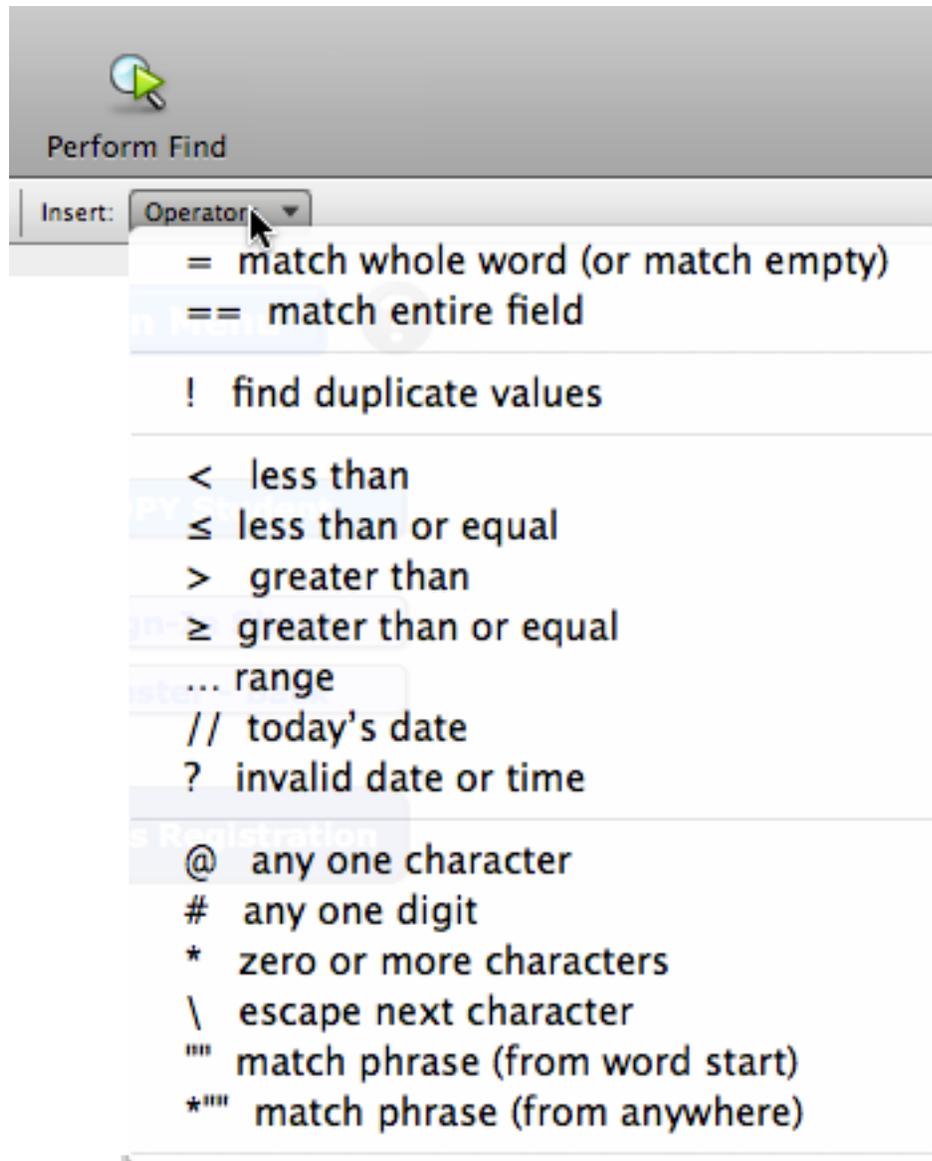
Note: Do not add new classes or students while in FIND mode. After performing a find always check the last line on the screen, to make sure it shows Browse instead of Find, before adding more records.

## Additional Capabilities

Use these symbols with data in the fields to refine your searches.

In find mode, click {Operators} to insert a symbol, or type the symbol as you enter the data you want to find.

These FIND symbols are available from the status area at the top of the screen:



## Find Symbols

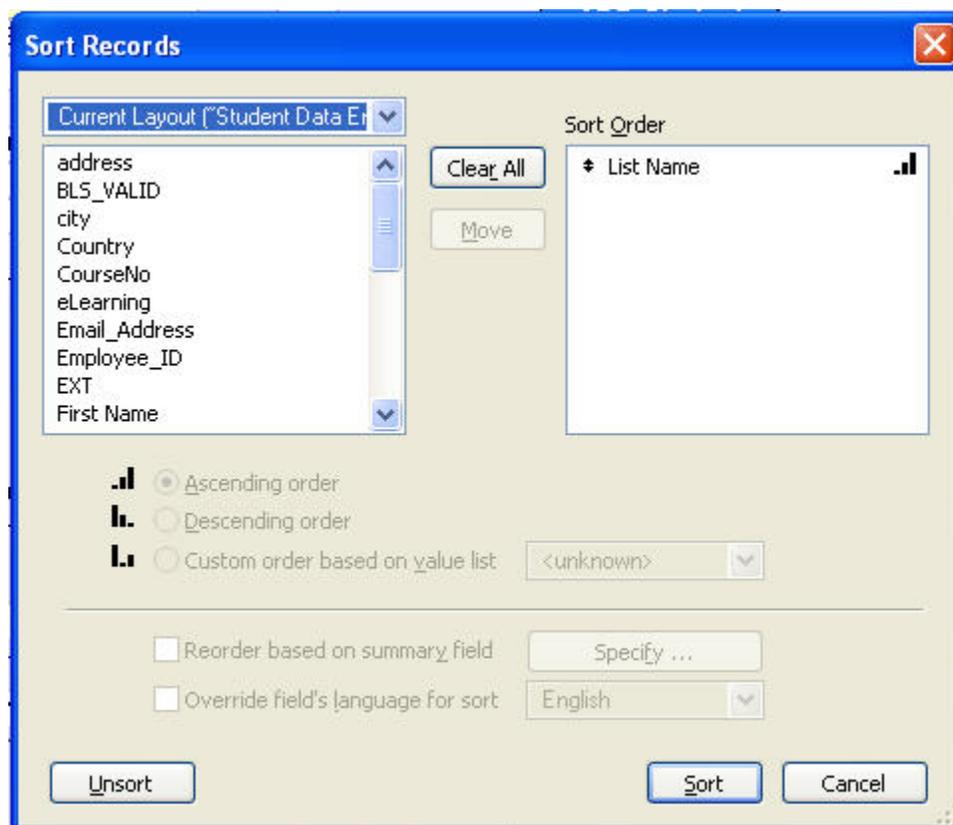
This table of examples illustrates advanced search capabilities.

Symbol	Name	Example
=	match whole word (or match empty)	Last Name: =Smith to find only students named Smith E-mail Address: = to find students without e-mail addresses
==	match entire field	Location Name: == Anytown Community Center to find classes at that specific teaching location
!	find duplicate values	Occupation: ! to find all students with the same type of work
<	less than	Registered: <24 to find classes with less than 24 students
<=	less than or equal to	Exp Date: <=05-31-13 to find instructions with certifications expiring on that date or earlier
>	greater than	Start Date: >03152012 to find classes starting after Mar 15
>=	greater than or equal to	Start Date: >=03152012 to find classes starting on or after Mar 15
...	range	Start Date: 03/01/2012...03/31/2012 to find all classes starting in March
//	today's date	Start Date: // to find all classes starting today
?	invalid date or time	Times: ? to find incorrectly entered times
@	any one character	Last Name: Sm@th to find Smith and Smyth
#	any one digit	Zip: 076## to find all students in northeastern Bergen County, NJ
*	zero or more characters	Last Name: Sm* to find Small, Smith, Smucker, and Smyth Location Name: *Hospital to find all classes taught at locations with Hospital in the name
\	escape next character (ignore next character)	E-mail Address: *\@gmail.com to find all students using Gmail addresses Note: Two symbols are combined in this search.
""	match phrase (from word start)	Location Name: "Anytown" to find all teaching locations starting with the word Anytown
*""	match phrase (from anywhere)	Location Name: *"Center" to find all teaching locations with the word Center anywhere in the name

## Sort

Class and student records are stored in the Roster Tool database in the order entered. These records can be sorted into a different order, based on the fields you select as sort criteria. Click {Sort Classes} or {Sort Students} in the *Class Registration* screen or the *Student Data Entry* screen, to see the list of fields that can be used to sort the records.

If you want students in order by last name, or classes in order by start date and course type, then click [Sort] to use the sort criteria already in the Sort Order list.



### Custom Sort

If you want to sort by other criteria, then use the *Sort Records* dialog box to move the fields you want to use from the alphabetic list of fields on the left, to the Sort Order list on the right by highlighting each field, then clicking [Move] to add it to the Sort Order list.

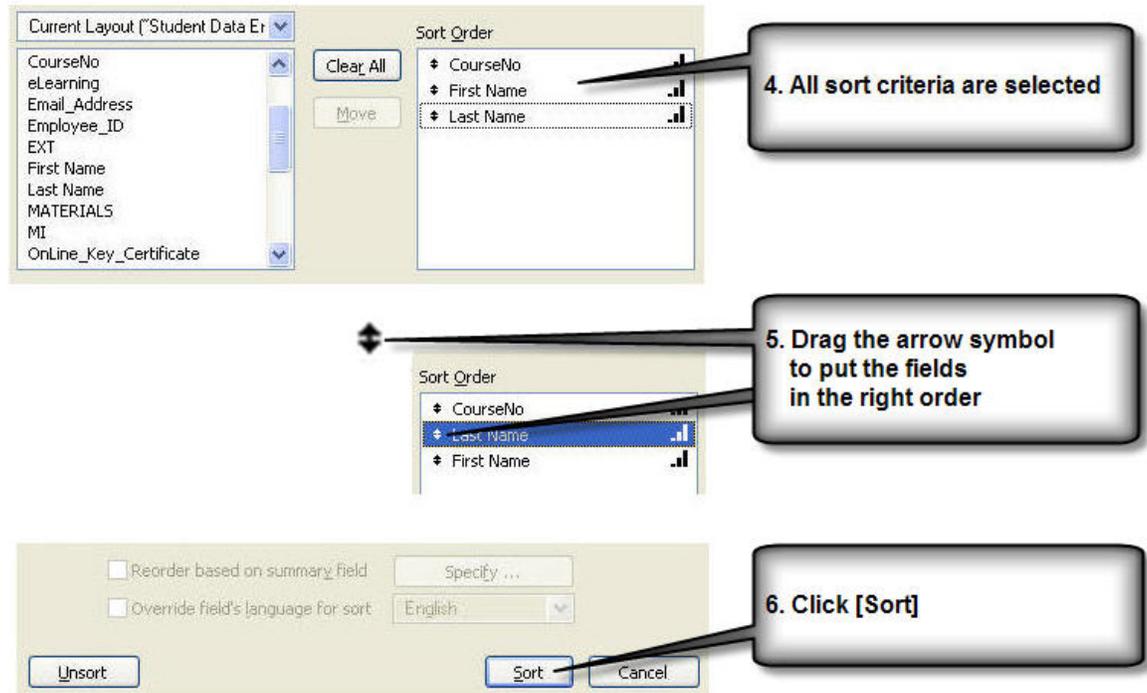
To sort the student records by class number, then by student name, use CourseNo, First Name, and Last Name as sort criteria.

The image consists of three sequential screenshots of the 'Sort Records' dialog box, illustrating the steps to customize the sort order. Each screenshot shows a list of fields on the left and a 'Sort Order' list on the right.

- Step 1:** The 'Sort Order' list contains 'List Name'. A callout box points to the 'Clear All' button with the text: "1. Click [Clear All] to remove existing sort criteria".
- Step 2:** The 'Sort Order' list is now empty. A callout box points to the empty list with the text: "2. Existing sort criteria are removed".
- Step 3:** The field 'CourseNo' is highlighted in the left list. A callout box points to the 'Move' button with the text: "3. Highlight sort criteria and move to Sort Order list".

When the list of fields for sorting is complete, highlight and drag the small up/down arrow symbol by each field in the Sort Order list to put the fields in the correct order, if necessary.

After the sort criteria fields are selected and in the correct order, then click [Sort].



After reviewing the records in the requested sort order, you can put the records back in the order they were entered, by clicking {Sort Classes} or {Sort Students} at the top of the Roster Tool screen, then [Unsort] in the *Sort Records* dialog box.

## ***FileMaker Pro Messages***

Most messages in the Roster Tool are self-explanatory. Please refer to the following explanations, listed alphabetically, if necessary.

### **Commit Records/Requests has been canceled. Do you wish to continue with this script?**

You have an incomplete class record open, and must either delete the new record or finish it before doing anything else.

To delete the incomplete class record, click [Cancel] once, then click [Delete] twice.

To finish creating the new class record, click [Continue] and add the required fields with yellow backgrounds.

### **Do you want to delete the entire master record or just this one related record?**

Click [Related], then [Delete].

### **File Link is defined to require a value, but it is not available on this layout. Use another layout to assign a value to this field.**

You clicked {New Class} to create a new class record, and then started another task. You must finish the new class record, or else delete the incomplete class record, before doing anything else.

To continue creating the new class record, click [OK], then [Revert], and enter the required fields for the new record.

To delete the incomplete class record, click [OK], then click [Cancel] twice, and [DELETE] twice.

### **No records are present. To create a new record choose the New Record menu command.**

Click [OK], then click {New Class} or {New Student} to create a new record.

### **Print has been canceled. Do you wish to continue with this script?**

Click [Cancel] to return to the report.

### **Revert all changes to this record since it was last entered?**

You have an incomplete class record open, and must either delete the new record or finish it before doing anything else.

To delete the incomplete class record, click [Cancel] twice, then [Delete] twice.

To finish creating the new class record, click [Revert] and add the required fields for the new record.

## Advanced Setup

### National Training Organization

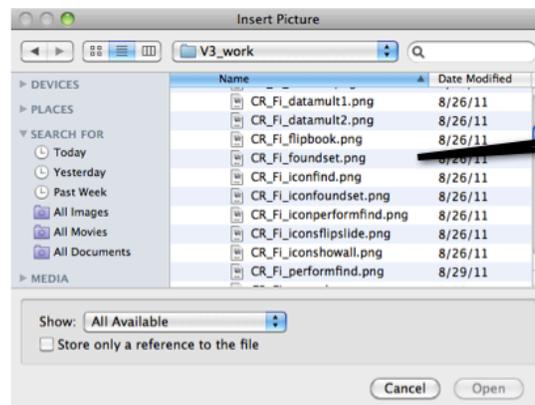
In the *General Setup* screen, choose the *Training Center* tab to use the advanced setup capabilities to change the name and logo for the national training organization.

Use the National Organization fields in the lower part of the screen to enter a different name for the national training organization and to use a different logo.



1. Enter the name of your affiliated training organization

2. Click [<< Insert Logo]



3. Choose graphic file for logo

## Settings

In the *General Setup* screen, choose the *Settings* tab.

This tab contains Roster Tool choices:

- Paper size
- Delete capabilities for course types and sub-options
- List of class data in roster e-mail



The screenshot shows the 'Settings' tab selected in a software interface. The title is 'Choose settings for Roster Tool.' with a help icon (question mark) in the top right. There are three settings:

- 'Select paper format for printing' with radio buttons for 'US Letter' (selected) and 'A4'.
- 'Enable DELETE for course types and course suboptions' with radio buttons for 'Yes' and 'No' (selected).
- 'ADD Class Data as a LIST at the end of the email body if your Training Center is using Version 3 of the TC Command Management Software or higher' with radio buttons for 'Yes' (selected) and 'No'.

### Paper Size

Use the radio buttons for paper format to choose letter size (8.5 x 11) or European size (A4).

Note: When A4 paper is selected, all printouts show DDMMYYYY date format, while dates in screens remain in the MMDDYYYY format.

### Deleting Course Types and Sub-Options

Use these radio buttons to protect the existing course type information from deletion by choosing No.

If you are in the process of changing and maintaining new course types (and sub-options if applicable) in the Roster Tool, and will need to delete some records, then choose **Yes** for these radio buttons.

TC Command recommends keeping this setting on **No** except when course types or sub-options need to be deleted.

**List of Class Data**

Use the class data radio buttons to include the list of class data in Training Center e-mails, or omit the list.

Note: Class notification and roster e-mails sent to the Training Center from the Roster Tool include class information in paragraph format. An additional list of class information can be included in class e-mails, which is useful for Training Centers importing rosters via TC Command Management V3 or later.

**Course Types**

In the *General Setup* screen, choose the *Course Types* tab to use the advanced setup capabilities for adding new course types, if applicable.

Use this tab to review the standard AHA course types available with the Roster Tool, and to add additional course types if needed.

**Enter data for new Course Type, then click [ADD Course].**

**CATEGORY** **Name of Course Type** **Product #**

BLS [ ] [ ]

**Course description for front of roster**

[ ]

**ADD Course**

ACLS	<b>ACLS Instructor</b>	[ ]	[ ]
ACLS and PALS Program Instructor Courses			
ACLS	<b>ACLS Provider</b>	[ ]	[ ]
Advanced Cardiovascular Life Support and Pediatric Advance Life Support			
ACLS	<b>ACLS-EP Instructor</b>	[ ]	[ ]
ACLS and PALS Program Instructor Courses			
ACLS	<b>ACLS-EP Provider</b>	[ ]	[ ]
Advanced Cardiovascular Life Support and Pediatric Advance Life Support			
BLS	<b>BLS for HealthCare Providers</b>	[ ]	[ ]
Basic Life Support for Healthcare Providers			

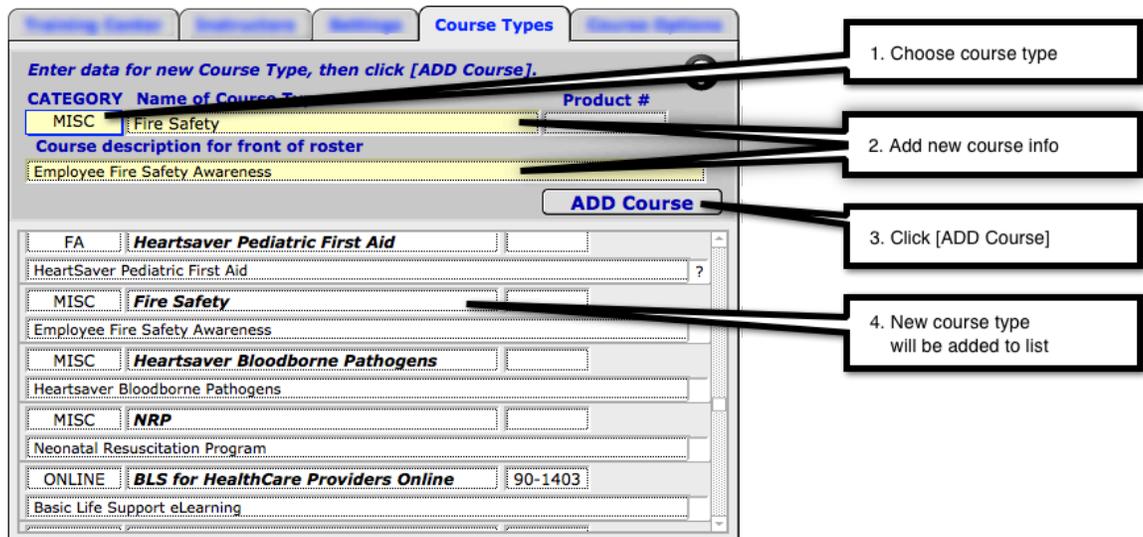
### AHA Course Types

Use the scroll bar to review the list of available course types.

### Add New Course Type

Additional course types can be added to the Roster Tool, if appropriate.

Complete the appropriate fields at the top of the tab, choosing the MISC (Miscellaneous) category for non-AHA courses, and click [ADD Course].



Note: Keep a record of the custom course types you add to the Roster Tool. If new AHA course types become available in the future, downloading an update for the new AHA course types will delete your custom course types in the Roster Tool, and you will need to add them again.

### Delete Course Type

The standard AHA course types provided with the Roster Tool should not be deleted.

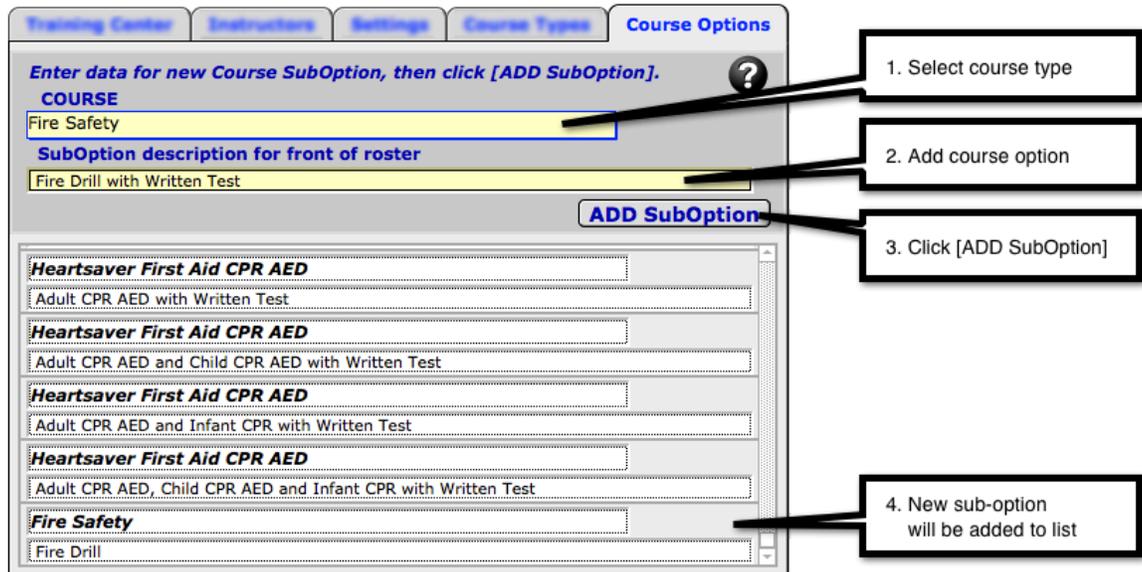
Miscellaneous course types provided with the Roster Tool and any new course types added to the Roster Tool can be deleted.

To delete a course type from the Roster Tool, click the [DELETE?] button by the course type record, then click [Delete] to confirm the deletion. If the [DELETE?] button is not displayed, see Settings on page 59.

Note: To change a miscellaneous course type, delete it from the Roster Tool and add it again correctly.

## Course Options

In the *General Setup* screen, choose the *Course Options* tab to use the advanced setup capabilities for adding sub-options to new course types, if applicable.



Use this tab to review the standard AHA sub-options available for course types in the Roster Tool, and to add sub-options for any new course types requiring sub-options.

To review existing sub-options, scroll through the course types listed in the lower half of the tab. Each course type and sub-option pair is listed separately.

To add a sub-option for a course type, click in the COURSE field and select the course type from the dropdown list, enter a sub-option for this course in the SubOption description for front of roster, then click [ADD SubOption]. Repeat these steps to add additional sub-options to this course type, then review the new sub-options in the lower half of the tab.

To change sub-options that you have added to the Roster Tool, click in the displayed text and make changes.

To delete a sub-option that you have added to the Roster Tool, click the [DELETE?] button by the sub-option, then click [Delete] to confirm the deletion.

If you need to use the [DELETE?] button and it is not displayed, refer to Settings in this Appendix.

Note: Sub-options must be deleted individually; deleting the associated course type does not delete the sub-options.

## Backup

Protect the valuable data in your Roster Tool. Perform backups on a regular basis.

1. Return to the Roster Tool main menu and click [QUIT] to exit, then confirm by clicking [QUIT Roster Tool].
2. Access the local hard drive (C:\) to find the TC Command Roster Tool folder in the Documents or My Documents folder.
3. Copy the entire TC Command Roster Tool folder to external media.

Store and rotate backups carefully.

Note: If backing up to an attached volume, use a compressed copy of the TC Command Roster Tool folder to prevent FileMaker Pro from finding and using the backup files.

## Roster Tool Support

Limited support is available for this product. If you have a question, please check the following:

1. Tool tips. When the cursor hovers over a field name, an explanation of the field is displayed.
2. Screen help. The help icon  on each screen and tab provides instructions for using that particular screen or tab.
3. User guide. The Roster Tool user guide is available from the main menu via [User Guide].
4. TC Command website. Go to [www.TCCommand.com](http://www.TCCommand.com) for FAQs, updates, etc.

## Transferring to another computer/Re-Activating

You are able to mover the Roster Tool to another computer or re-activate an installation after reformatting a computer by holding down the SHIFT and OS keys together when launching the program. If this is needed due to a computer crash and your hard drive is wiped, then go to [www.TCCommand.com](http://www.TCCommand.com) for additional instructions on releasing the activation.

TC Command Roster Tool uses a FileMaker® Pro runtime engine.

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