



Learning: Admin overview

Application administrators of the Learning application can access its admin side (Applications > Admin > Learning) and configure the options detailed below.

- [Learning Path](#)
- [Training Records](#)
- [Certificate Expiration](#)
- [Bulk Import/Export](#)
- [Qualification Codes](#)

Learning Path

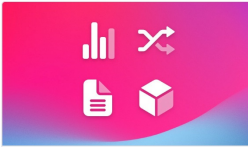
Enter [users/roles/groups](#) who should be able to manage [Learning paths](#):

A screenshot of the Learning Paths admin interface. The page title is "Admin > Learning". The main heading is "Learning Paths" with a sub-note: "Learning Path administrator has full permission to add / edit / delete all Learning Paths". Under the "Permissions" section, there is a search input field with the placeholder "Start typing to add...", a "Browse" button, and a "Remove" button. Below the search field, a dropdown menu is open showing "Role: Administrators". A "View matching users..." link is visible below the dropdown. At the bottom of the form is a "Save" button. On the left side, there is a sidebar menu with "Learning Path" selected, and other options: "Training Records", "Certificate Expiration", "Bulk Import/Export", and "Qualification Codes".

On the front end of Learning (Applications > Learning > Learning paths), users with this permission can create new paths, or edit/delete those existing:

Learning > Learning Paths ?


+ Create New Path



Claromentis Digital Workplace

This course provides an overview of Claromentis, focussing on the commonly used appli...

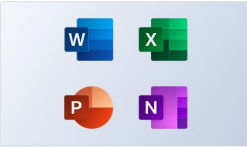
Join this path to reveal your progress
Points: 0/40 0%



Employee Induction Program

Getting to know your team, the company and our working environment. Learn more about ...

Join this path to reveal your progress
Points: 0/15 0%




Microsoft Office 365 for Beginner

Get Microsoft Office 365 training and gain the skills needed to be productive at work...

Your Progress
Points: 0/70 0%

Learning > Learning Paths > View Path ?



Employee Induction Program (IND001)

Getting to know your team, the company and our working environment. Learn more about the company and it's culture.

Join this path Edit

Join this path to reveal your progress
Points: 0/15 0%

Path Details | Path Steps | Participants

- Y **Onboarding course** (OBC) *
 10 Points + Onboarding Training
- Y **Team introductions** (MLM) *
 Attend this event to get to know your team members and senior management.
 5 Points + Team introductions (31-07-2020 23:00)

Training Records

Training records can be created within Claromentis by manually creating them or having them automatically added by marking a Course, event or other as part of this.

Enter users/roles/groups who should be able to view training records vs update or manage them.

Admin > Learning ?

Training Records

Training Record administrator has full permission to add / edit / delete all Training Records

Permissions

Start typing to add... Browse Remove

All registered
Role: Administrators

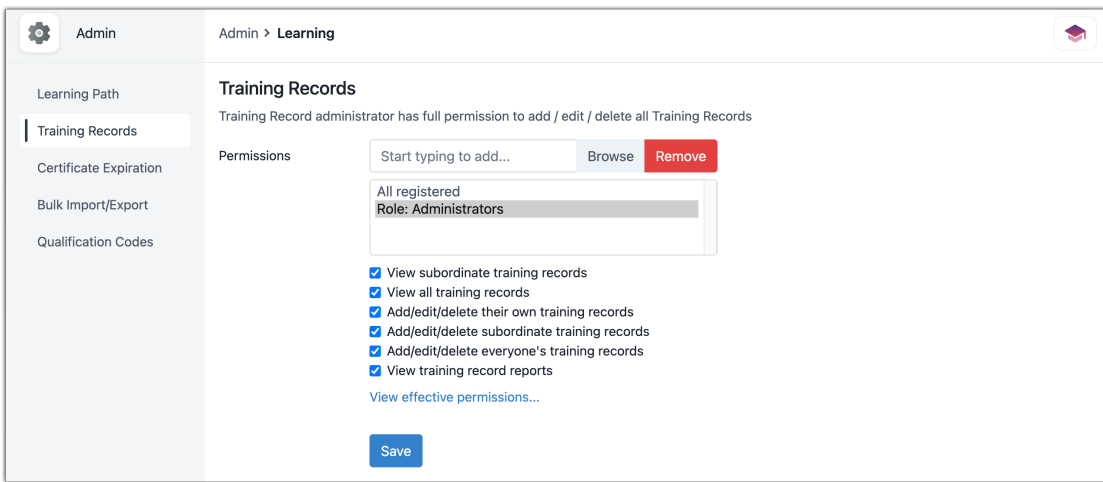
- View subordinate training records
- View all training records
- Add/edit/delete their own training records
- Add/edit/delete subordinate training records
- Add/edit/delete everyone's training records
- View training record reports

[View effective permissions...](#)

Save

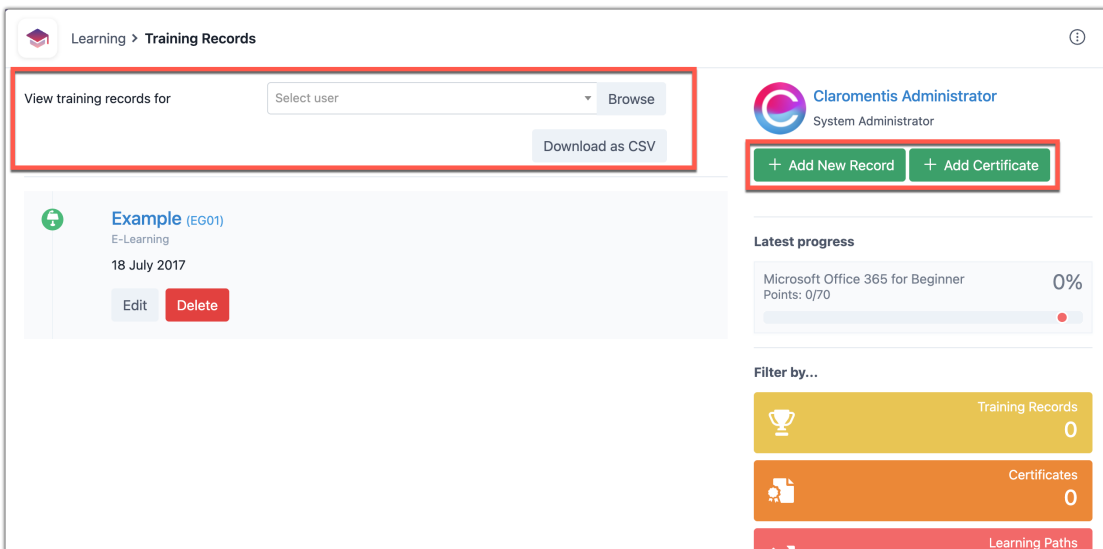
Generally, the choice is whether to allow the majority of users to update their own records manually or to have only administrators able to do this on their behalf.

(Any content marked with the in-system 'training record' option will always update the user's training record, the permission related to manual additions)



- **View subordinate training records:** User(s) (i.e. Managers) can view subordinates' training records.
 - This depends on the direct reports filled out on user profiles in the 'Org Chart' tab - a manager will only be able to access records of their direct reports as entered.
- **View all training records:** Everyone's training record can be viewed
- **Add/edit/delete their own training records:** Can manage their own training records.
- **Add/edit/delete subordinate training records:** Can manage training records belonging to their subordinates as well as their own.
- **Add/edit/delete everyone's training records:** Can manage all training records for every user.
- **View training record reports:** Can access reports from the front-end of documents containing training records of all users.

On the front end of Learning (Applications > Learning > Training records), users can search other users' training records or update their own, depending on the permissions they have been given.



Certificate Expiration

Define the intervals to use for Certificate expiration reminder notifications.

The format this is sent in will be in line with each user's notification preferences.

Admin > Learning

Certificate Expiration

Choose the intervals to use for Certificate expiration reminder notifications

On expiry date: Always available

Reminder 1: 14 day(s) prior

Reminder 2: 30 day(s) prior

By default, also send reminders to

Start typing to add...

[View matching users...](#)

This notification applies to certificates manually added to the system and given a validity date:

Learning > Training Records

View training records for:

Example (EG01)
E-Learning
18 July 2017

Claromentis Administrator
System Administrator

Latest progress
Microsoft Office 365 for Beginner
Points: 0/70
0%

Filter by...

- 0
- 0

Learning > Training Records > Add/Edit Certificate Details

Certificate Name *

Certificate PDF No file chosen

Certificate Image

Online Certificate URL

License No.

Valid from

Valid to

Send notification to the user that their certificate has been updated

Bulk Import/Export

Use the facility to [bulk import](#) or [export training records](#):

Bulk Import/Export Training Records

If you wish to bulk update Training Records, Export the current selection as a CSV and remove the "email", "firstname" and "lastname" columns.

To bulk delete records, simply set the "Delete?" column to "1" on the rows you wish to remove from the records.

The column headings in an imported file should be: Record Id, Name, Record Type, Object Id, Title, Training Provider, Completion Date, Other Information, Qualification Code and Delete?

Choose file No file chosen

Browse Documents

Import from CSV Download CSV Template Export as CSV

Upload your own CSV using the 'import from CSV' button or first download a template from the system to fill out locally to ensure the columns are correct.

The export option will generate a CSV that includes training records for all users. If records are needed from select users, this can be downloaded from the front end (Applications > Learning> Training records > Search user > Download as CSV)

Qualification Codes

Qualification codes are used in Claromentis solely to tie content to Learning paths.

On the front end, those with the ability to create learning content can also create new codes when adding it.

Administrators can manage codes from this tab - create new ones, edit those existing or delete them.

More information is given in our guide about qualification codes [here](#).

Warning! Existing Training Events or E-Learning Courses that are using the same code need to be updated when changing a Qualification Code.

Qualification Codes + Add Code Permissions

10 entries per page < 1 2 3 >

Code	Description	Used In		
CLABEG				
CLADROP				
CLAESS				
CLARODROP				
CLAROTAT				