

Learning: Admin overview

Introduction

In this article, you will be given an overview of the admin area of the Learning application

The Learning application Admin panel has a variety of configuration options which can be found in **Admin > Learning**. We will go through the following options one by one.

- Learning Path
- Training Records
- <u>Certificate Expiration</u>
- Bulk Import/Export
- Qualification Codes

The admin side & learning permissions

To access the admin panel of the Learning application, you will need to be granted permission as an application administrator first.

For more information, check our guide on Setting system administrators and application administrators

Learning Path

The first area you will enter upon accessing the admin side of the Learning application is Learning Paths.

This section will give users full permission to access and manage learning paths by allowing them to add/edit/delete all Learning Paths:

Admin / Learning	
Learning Path	Learning Paths
Training Records	Learning Path administrator has full permission to add / edit / delete all Learning Paths Permissions Start typing to add Browse Remove
Certificate Expiration	Role: Administrators
Bulk Import/Export	
Qualification Codes	View matching users
	Save

This can be seen from the front-end of the application where the user(s) will have the option to view, create, and edit any learning path that exists on the intranet:

arning / Learning Paths			× 1 • ×
claromentis	2	Office	+ Create New Path
intranet software Claromentis Beginner This course provides an	Concernent of the second secon	Microsoft Office Beginner	
overview of Claromentis, focussing on the commonly used appli	Join this path to reveal 0% your progress Points: 0/15	Get Microsoft Office training and gain the skills needed to express your ideas, solve	
loin this path to reveal 0% your progress Points: 0/40	0	Join this path to reveal 0% your progress Points: 0/70	

For an overview, check out our guide on Learning Paths.

Training Records

The Training Records section will give users full permission to access and manage training records by allowing them to add/edit/delete all training records:

Admin / Learning						
Learning Path	Training Records					
Training Records	Training Record admini	strator has full permission to add / edit / delete all	Training F	Records		
	Permissions	Start typing to add	lrowse	Remove		
Certificate Expiration		Role: Administrators	_			
Bulk Import/Export		Group: Human Resources				
Qualification Codes		View subordinate training records				
		View all training records				
		Add/edit/delete their own training record	s			
		□ Add/edit/delete subordinate training rec	ords			
		Add/edit/delete everyone's training reco	rds			
		View training record reports				
		View effective permissions				
		Save				

It is also possible to define different types of permission by their role/group:

- View subordinate training records: User(s) (i.e. Managers) can view subordinates training records within the learning platform.
 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: User(s) can view all training records for every user.
- Add/edit/delete their own training records: User(s) can manage their own training records.
- · Add/edit/delete subordinate training records: User(s) can manage training records belonging to their subordinates as well as their own.
- Add/edit/delete everyone's training records: User(s) can manage all training records for every user.
- View training record reports: User(s) can access reports from the front-end of documents containing training records of all users.

/iew training	record	Is for Select user • E	Download as CSV	Claromentis Administrator System Administrator
3 June 2021	0	Claromentis Test ^{Quiz}	/ 亩	+ Add New Record + Add Certificate
3 April 2021	0	Excel and Elevate Training (FN-02) E-Learning	∕ 亩	Latest progress
16 February 2021	0	ABC Certificate Certificate	╱亩	
18 July 2017	0	Training Test (EG01) E-Learning	≠ 亩	

From the front-end of the application, the user will see the following options:

For an overview, check out our guide on Training Records.

Certificate Expiration

This section will allow users to define the intervals to use for Certificate expiration reminder notifications:

Admin / Learning		*
Learning Path	Certificate Expiration	
Training Records	Choose the intervals to use for Certificate expiration reminder notifications	
Certificate Expiration	On expiry date Always available Reminder 1 14 day(s) prior	
Bulk Import/Export	Reminder 2 30 day(s) prior	
Qualification Codes	By default, also send reminders to Start typing to add Browse Remove View matching users Save	

Reminder: Notifications will be sent to users according to the user's communication settings (i.e. email and/or in-system messages).

Bulk Import/Export

As an application administrator, this is where you can bulk update Training Records or export existing training records:

Admin / Learning	
Learning Path	Bulk Import/Export Training Records
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.
Training Necords	To bulk delete records, simply set the "Delete?" column to "1" on the rows you wish to remove from the records.
Certificate Expiration	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?
Bulk Import/Export	Choose File No file chosen
Qualification Codes	Browse Documents
	S Import from CSV ODwnload CSV Template

To import records, you can either (1) Browse the CSV directly from the Documents application by selecting Browse Documents or (2) Upload the CSV from your own PC by selecting Choose File or using our drag and drop feature:

Admin / Learning	æ
Learning Path	Bulk Import/Export Training Records
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.
Certificate Expiration	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?
Bulk Import/Export	Choose File No file chosen
Qualification Codes	Browse Documents Browse Documents Import from CSV Download CSV Template
	Example Training Recol _s s.csv
-	ully be imported upon clicking 🛃 Import from CSV if the CSV is in the correct format. If you require a template of the CSV, selec
Download CSV Templa	ite

For more information, check out Bulk Import Training Records.

To export training records, you can select export one as a CSV. The CSV will contain all training records of every user:

Admin / Learning	
Learning Path	Bulk Import/Export Training Records
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.
Training Records	To bulk delete records, simply set the "Delete?" column to "1" on the rows you wish to remove from the records.
Certificate Expiration	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?
Bulk Import/Export	Choose File No file chosen
Qualification Codes	Browse Documents Import from CSV Download CSV Template Export as CSV

Please note: The CSV from the admin side will provide training records of every user. However, if you need training records from select users, you can do so from the front end of the application.

Qualification Codes

The Qualification Codes section is where you will see a list of all existing qualification codes and where they are used in the application:

earning Path	Warning! Existing Training Events or E-Learning Courses that are using	he same code need to be updated when changing	a Qualification Code.
raining Records			
Certificate Expiration	Qualification Codes		+ Add Code Permission
Bulk Import/Export	10 v entries per page		· 1 2 3)
Qualification Codes	Code Description	Used In	
	CLABEG	8	/ 亩
	CLADROP		/ 面
	CLAESS	Θ	/ 面
	CLARODROP	🗊 🔮	/ 面
	CLAROTAT	0	/ 亩
	CLATT	🖸 🚱	/ 面
	CPR	Θ	/ 亩
	EG01	9	≠ m
	EGMP		/ 亩
	EGP		/ m

To add a new code, you can do so by clicking + Add Code at the top right-hand side of the page.

To change permissions for a certain user or set of users to edit the qualification codes, select the key icon Permissions

To edit or delete any of the existing qualification codes, select the pencil icon or trashcan to the right of the desired code:

Admin / Learning			R
Learning Path	Warning! Existing Training Events or E-Learning Courses that are using the	same code need to be updated when changing	a Qualification Code.
Training Records	Qualification Codes		+ Add Code
Certificate Expiration			
Bulk Import/Export	10 v entries per page		< 1 2 3 >
Qualification Codes	Code Description	Used In	
	CLABEG	()	/ 亩
	CLADROP		/ 亩
	CLAESS	G	∕ 亩

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

Created on 5 July 2021 by Veronica Kim. Last modified on 12 August 2024 Tags: admin, learning, lms, user guide, qualification code, qualification