



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](#)
- [Certificate Expiration](#)
- [Bulk Import/Export](#)
- [Qualification Codes](#)

The admin side & learning permissions

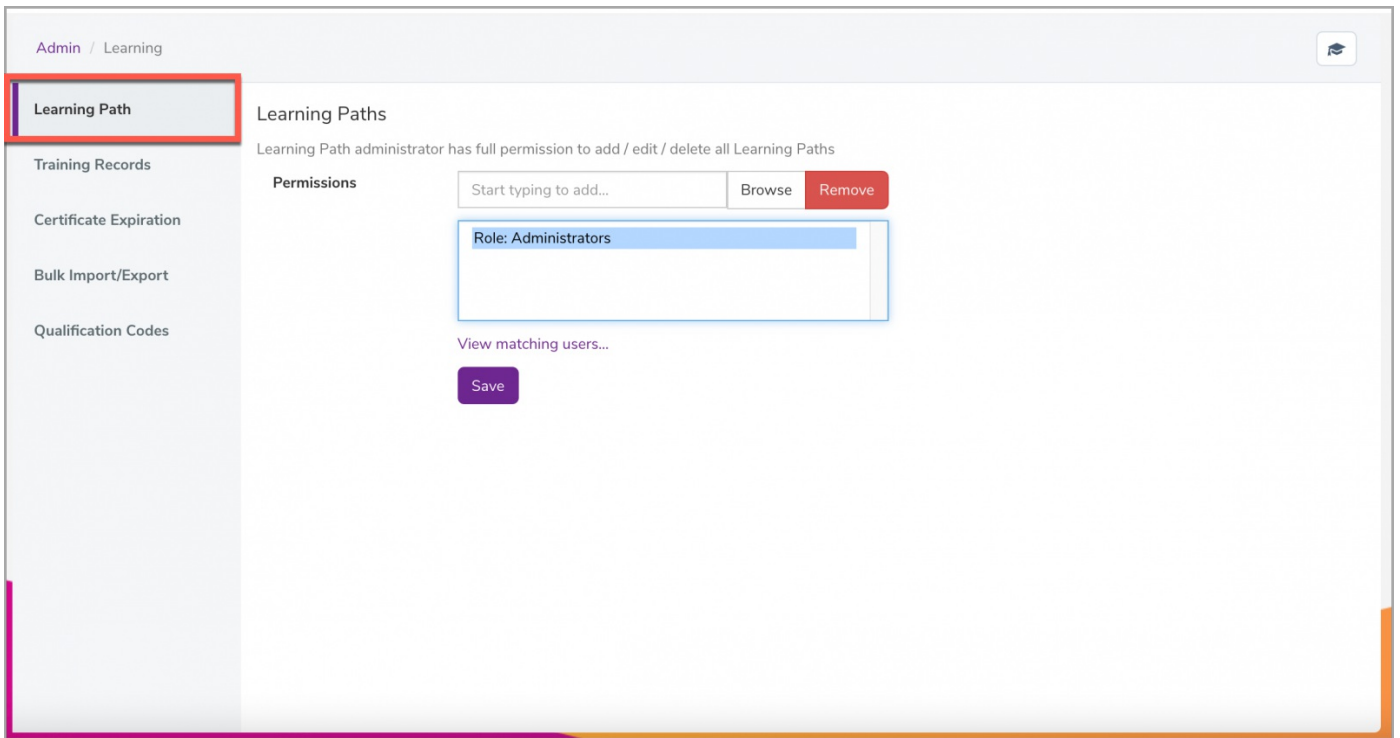
To access the admin panel of the Learning application, you will need to be granted permission as an application administrator first.

For more information, check our [guide on Setting system administrators and application administrators](#)

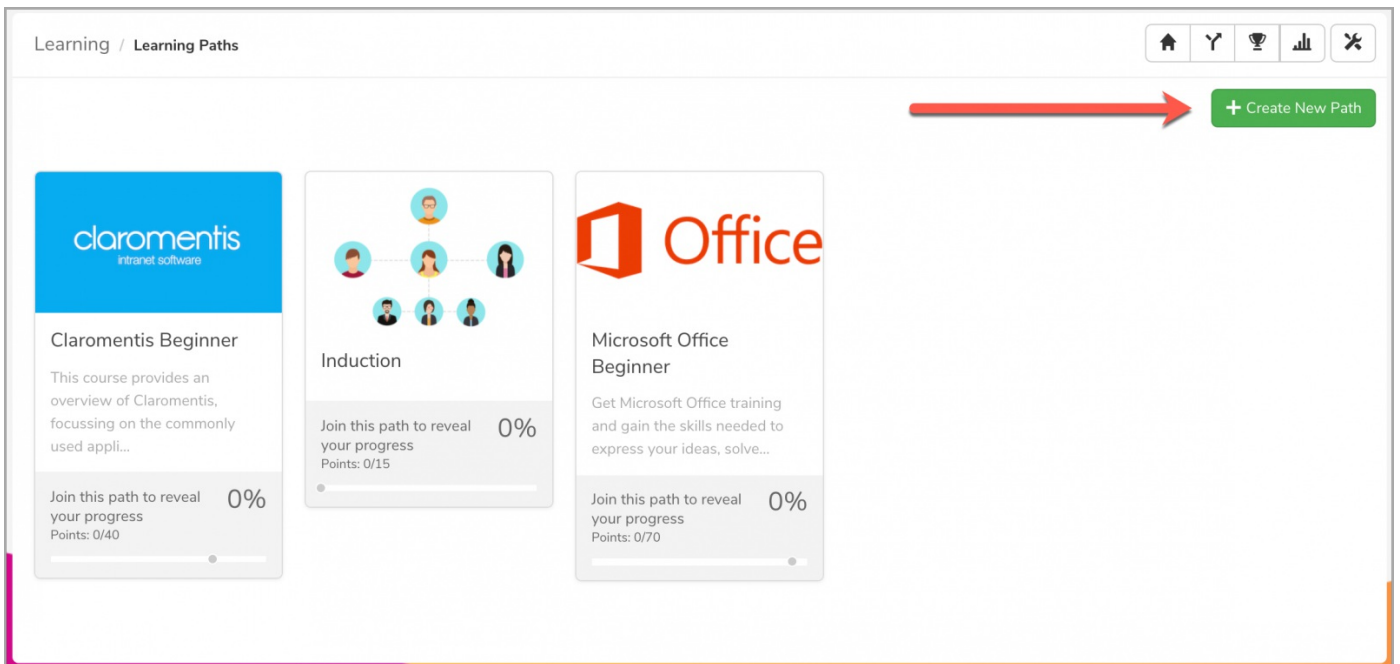
Learning Path

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:



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:



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

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Training Records

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

Permissions

Start typing to add...

Role: Administrators
Group: Human Resources

- 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...](#)

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.

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

Learning / Training Records

View training records for

3 June 2021 **Claromentis Test** Quiz

13 April 2021 **Excel and Elevate Training (FN-02)** E-Learning

16 February 2021 **ABC Certificate** Certificate

18 July 2017 **Training Test (EG01)** E-Learning

Claromentis Administrator
System Administrator

Latest progress

Induction
Points: 0/15
0%

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:

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Certificate Expiration

Choose the intervals to use for Certificate expiration reminder notifications

On expiry date: Always available

Reminder 1: day(s) prior

Reminder 2: day(s) prior

By default, also send reminders to

[View matching users...](#)

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 🏠

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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?

No file chosen

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

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Choose File No file chosen

Browse Documents

Import from CSV Download CSV Template

Export as CSV

Example Training Records.csv

The CSV will successfully be imported upon clicking  if the CSV is in the correct format. If you require a template of the CSV, select



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:

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Bulk Import/Export Training Records

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Choose File No file chosen

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:

Admin / Learning 🎓

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Qualification Codes

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			
CLATT			
CPR			
EG01			
EGMP			
EGP			

Showing 1 to 10 of 21 entries

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 🎓

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