Link to article: https://discover.claromentis.com/knowledgebase/articles/817

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

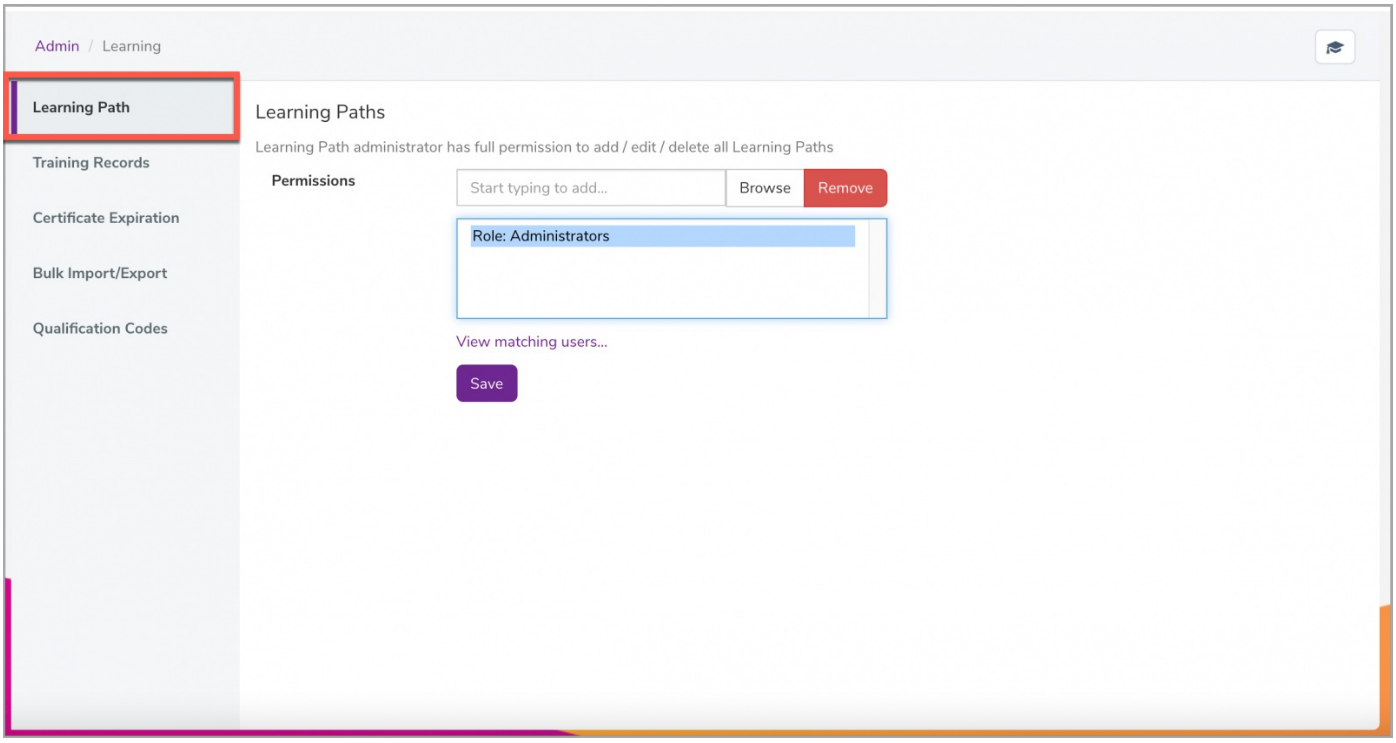
To access the admin panel of the Learning application, you will need to be granted permission as an application administrator first.

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

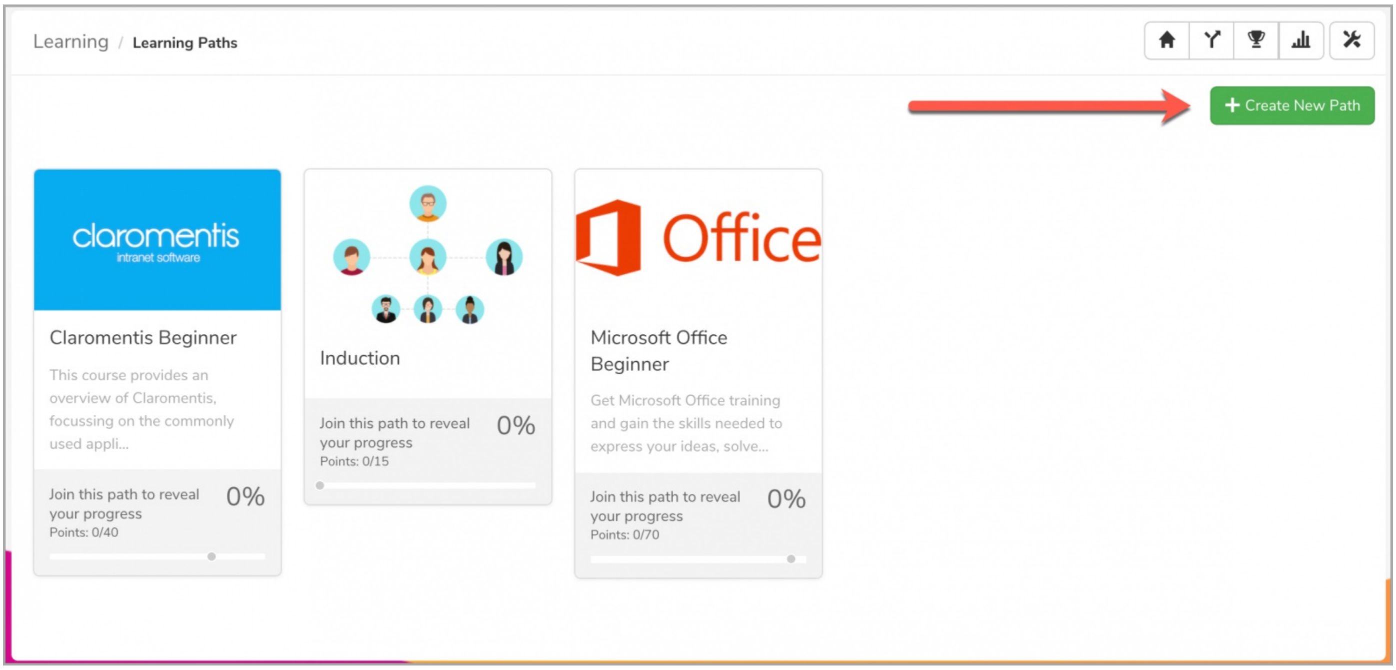
Learning Path

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:



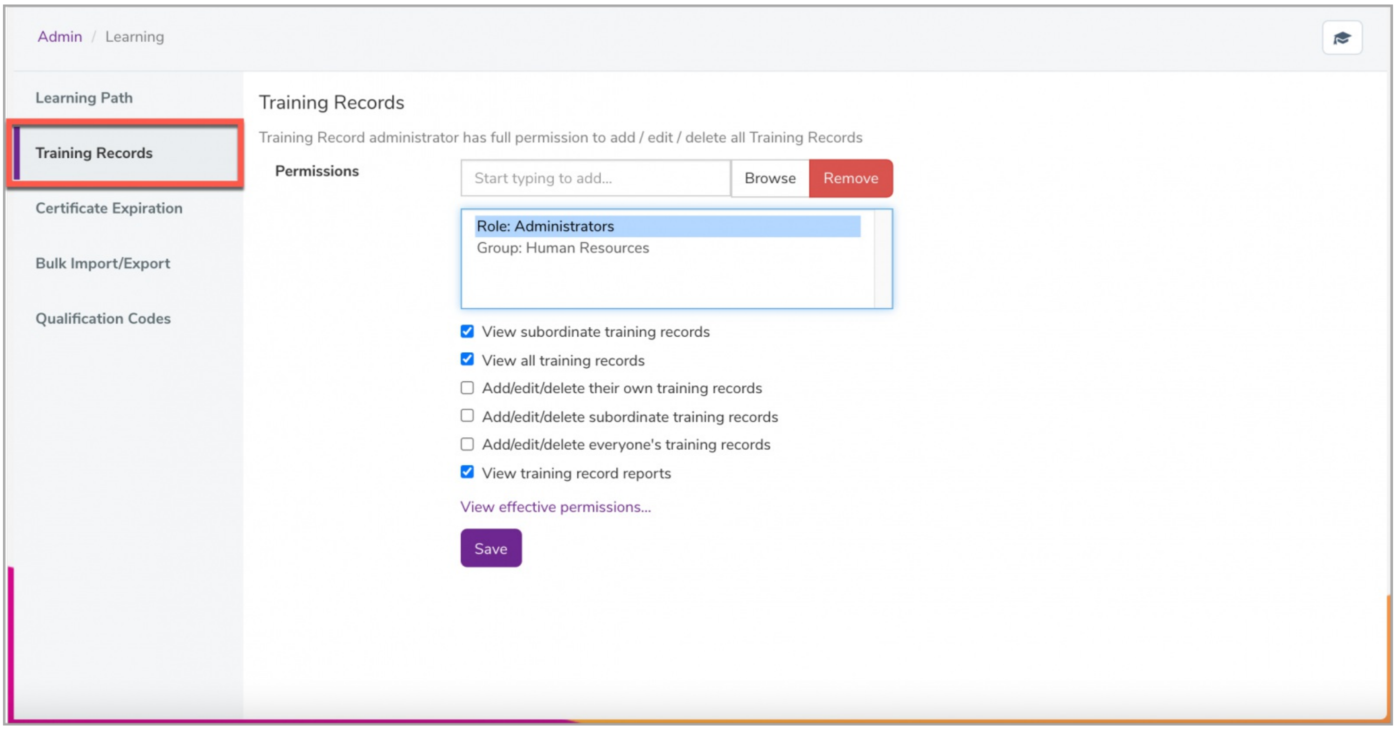
This can be seen from the front-end of the application where the user(s) will have the option to view, create, and edit any learning path that exists on the intranet:



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

Training Records

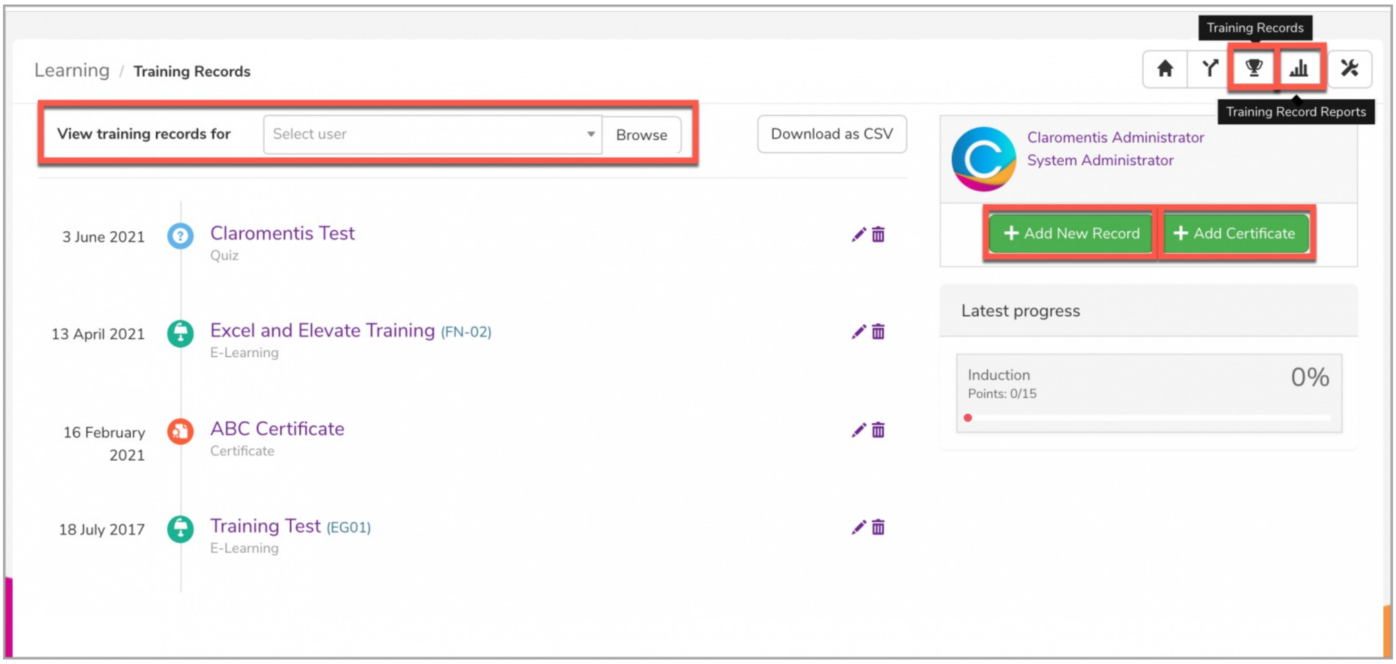
The Training Records section will give users full permission to access and manage training records by allowing them to add/edit/delete all training records:



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.

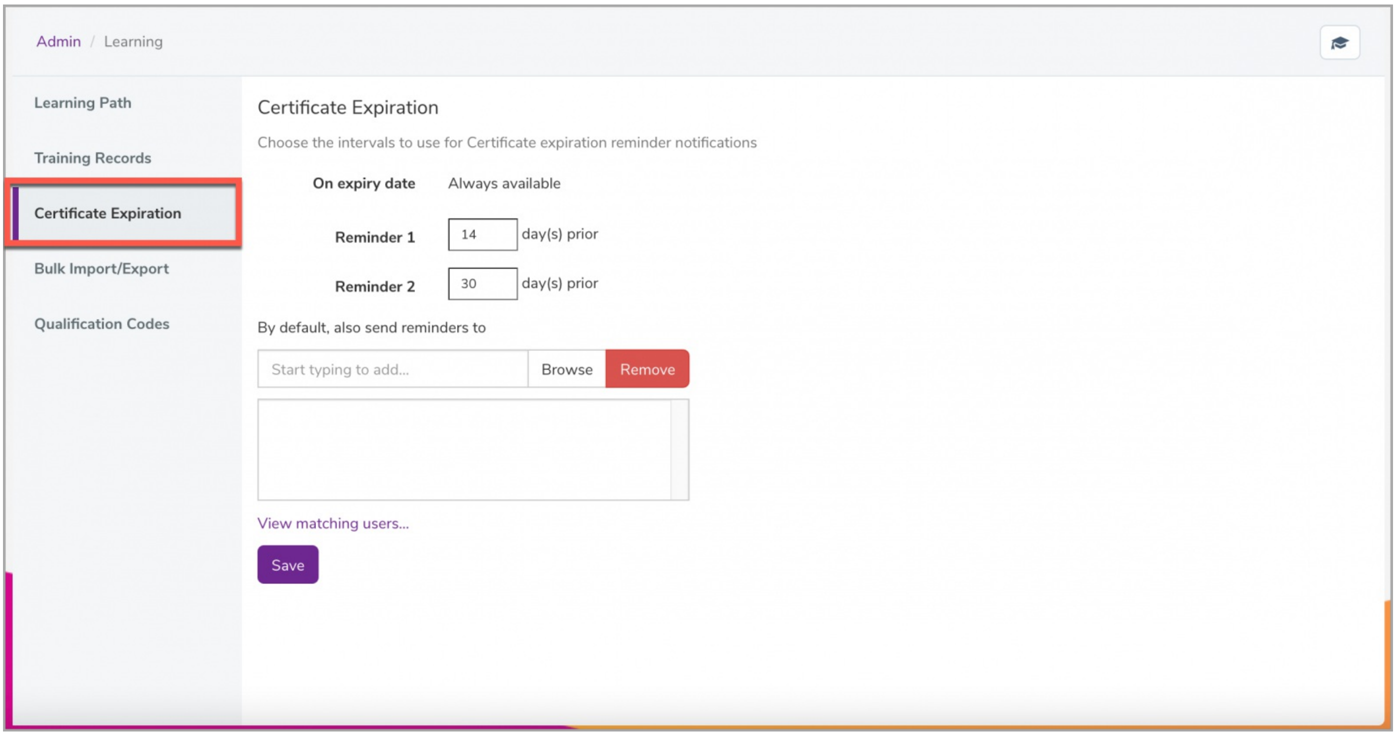
From the front-end of the application, the user will see the following options:



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

Certificate Expiration

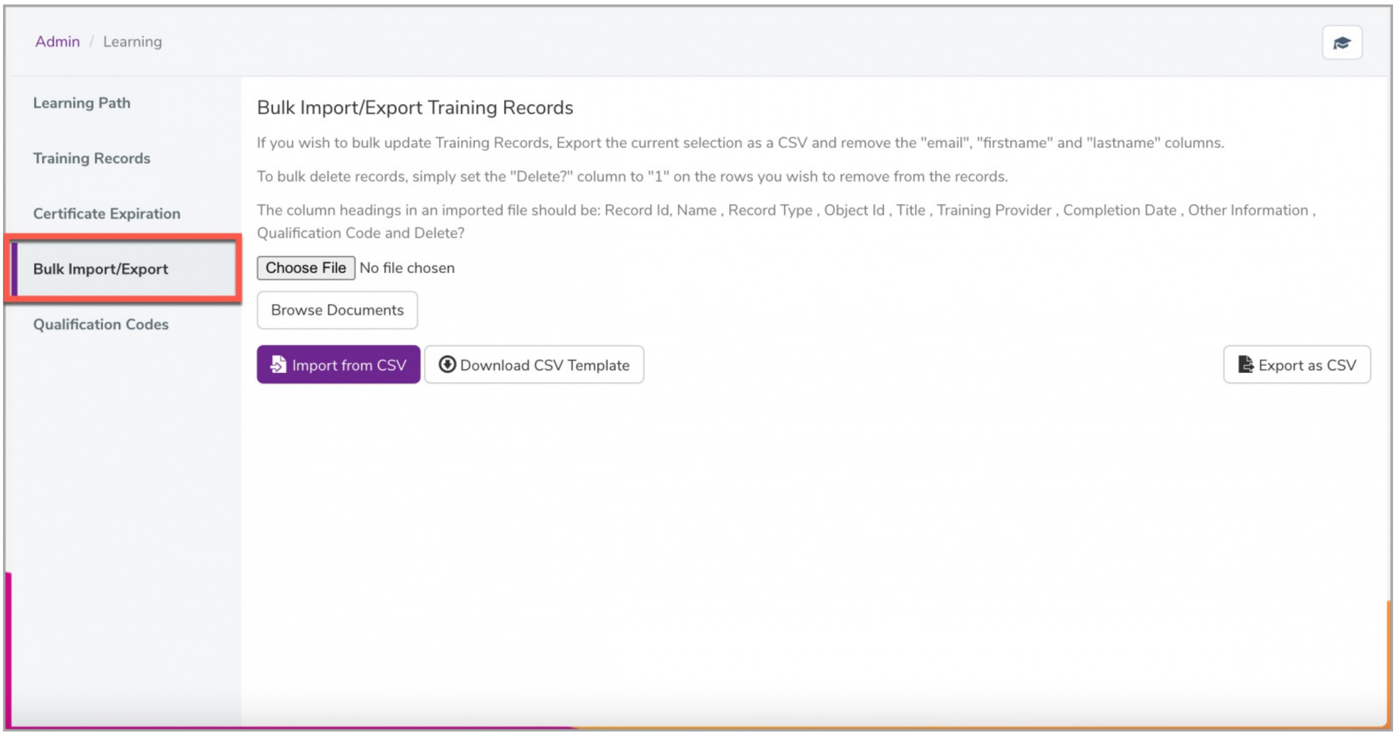
This section will allow users to define the intervals to use for Certificate expiration reminder notifications:



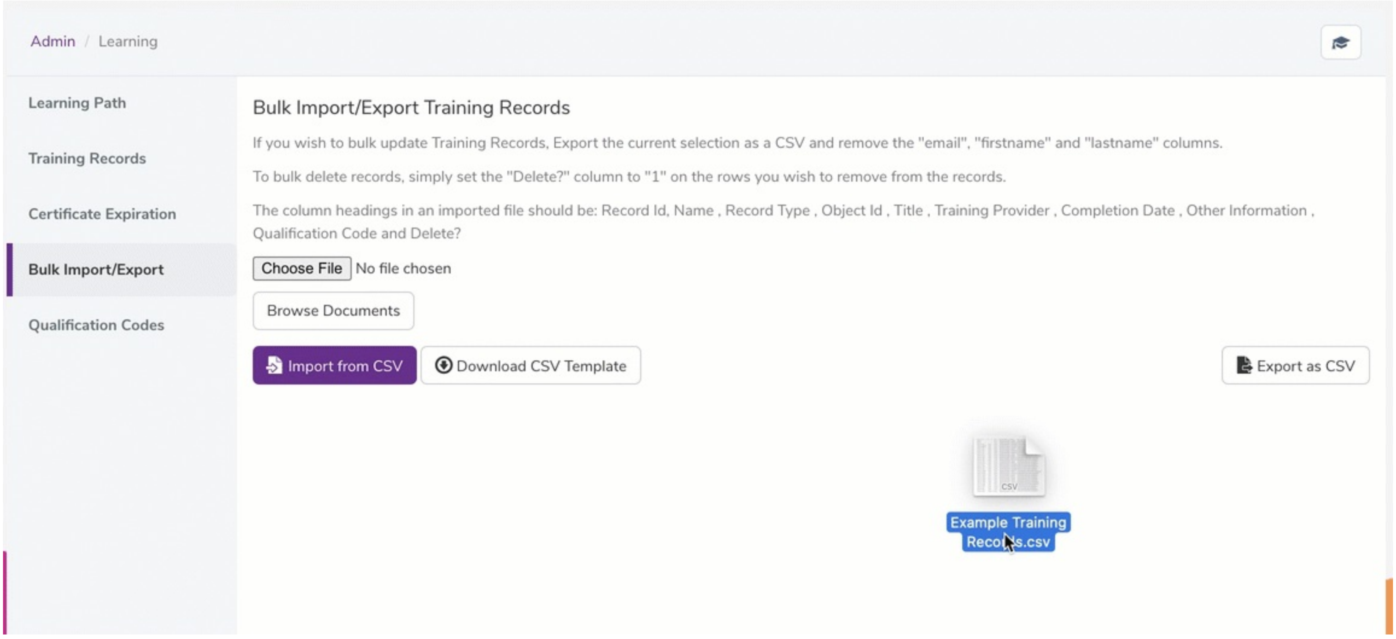
Reminder: Notifications will be sent to users according to the user's communication settings (i.e. email and/or in-system messages).

Bulk Import/Export

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



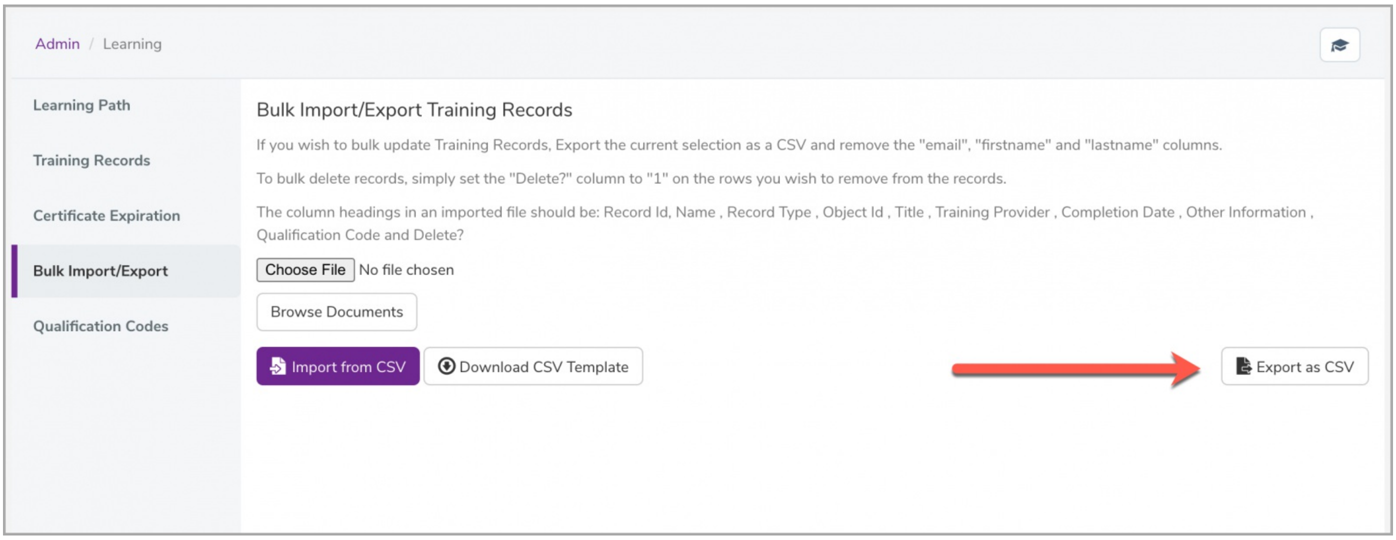
To import records, you can either (1) Browse the CSV directly from the Documents application by selecting Browse Documents or (2) Upload the CSV from your own PC by selecting Choose File or using our drag and drop feature:



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

For more information, check out Bulk Import Training Records.

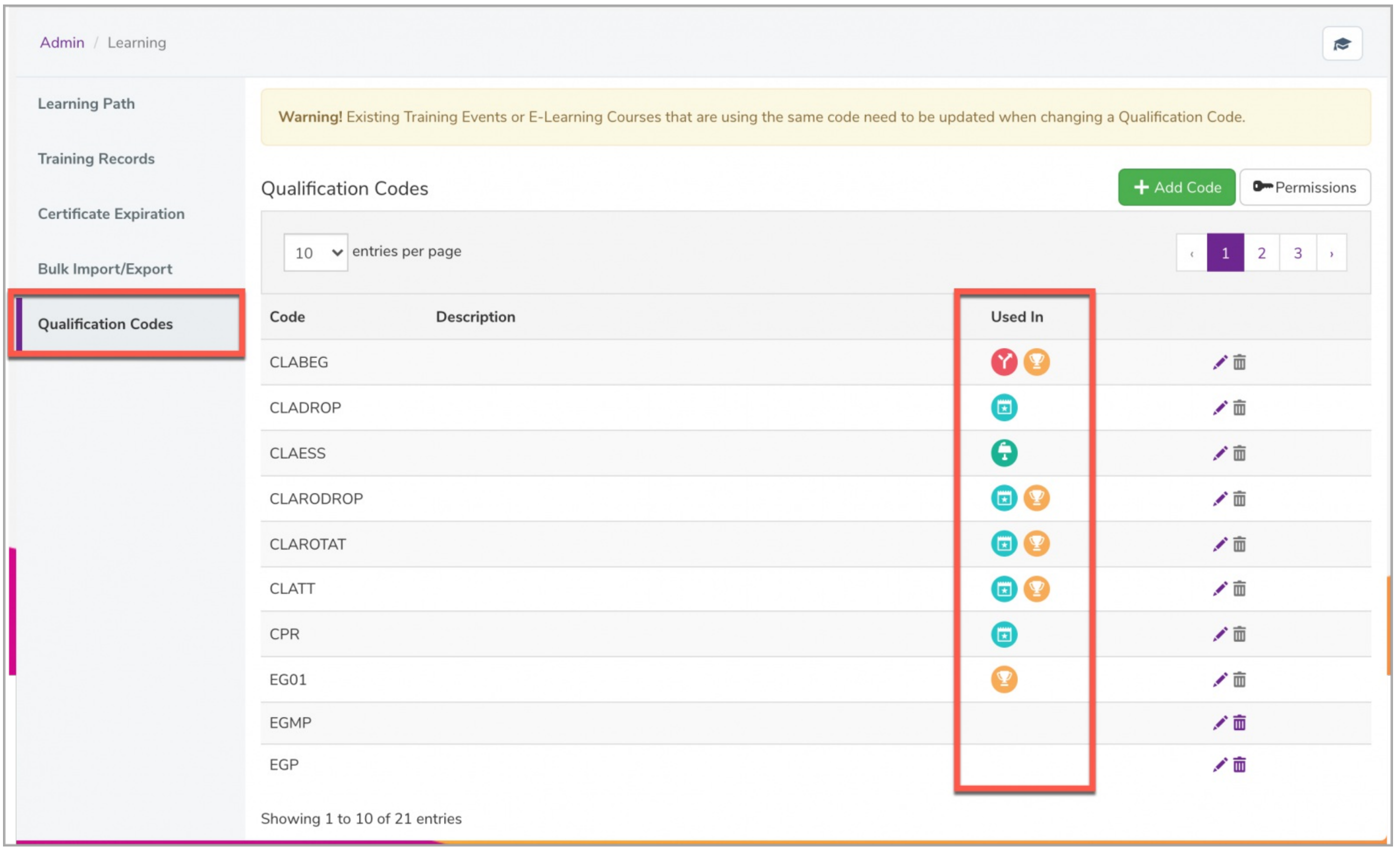
To export training records, you can select export one as a CSV. The CSV will contain all training records of every user:



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

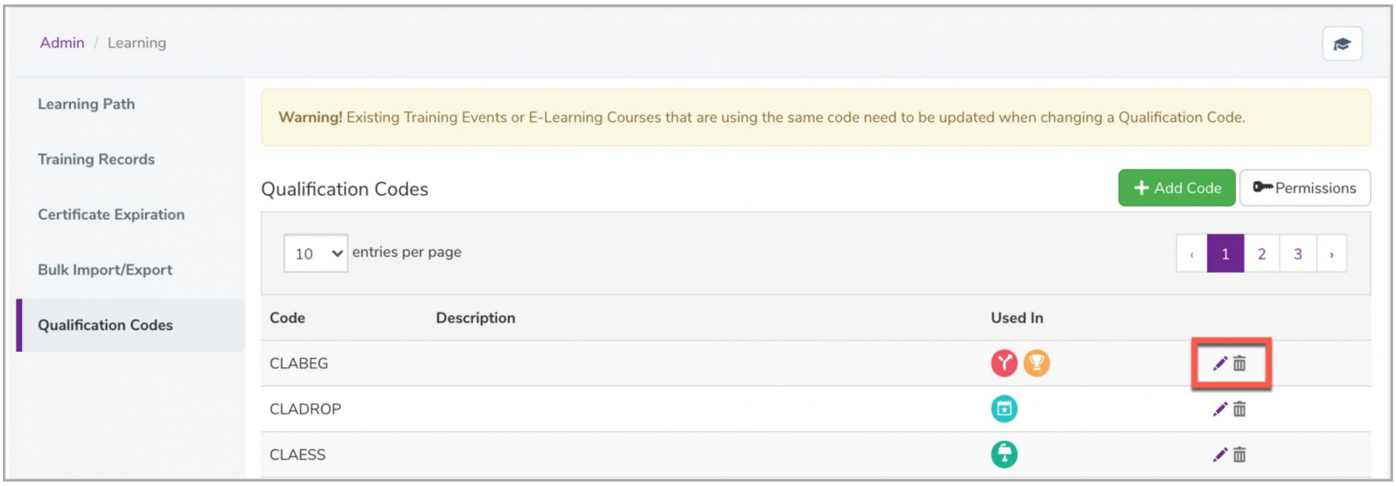
The Qualification Codes section is where you will see a list of all existing qualification codes and where they are used in the application:



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:



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