Supplemental Training

This feature is available to Site Manager and Manager accounts depending on system configuration.

Introduction

The supplemental training feature lets you store and track records for content that is not offered within the system. You can also upload supporting documents to each user's training record, track associated costs, and use automatic email alerts to let users know when their training is expiring. Any number of supplemental training records can be added to a user's profile and then edited, deleted, and reported upon.

Training Record Reports

1. R403 is a dedicated external training report report.
2. R404 is a dedicated internal training report report.
3. The Supplemental Training page itself can be filtered and exported as R906.

Navigate to Training Records

This feature is available to Site Manager and Manager accounts depending on system configuration.

Individual's Training Records

1. Navigate to User Accounts .
2. Select **Supplemental Training** from the Sections menu on the right. If you can't see the menu, show the Tool Panel .

Example of an individual's supplemental training page.

Product	Description	Attachment	Start Date	End Date	Expiry Date	Price
WHMIS(+)	Non-mandatory auxiliary training as WHMIS instructor.	whmisinstructor.jpg	9/10/2014 12:00 AM		9/10/2015 12:00 AM	$0.00
Intro to Air Ambulance 2.1		air_ambulance_quiz.pdf	1/9/2015 12:00 AM		2/1/2016 12:00 AM	$0.00

External Supplemental Training

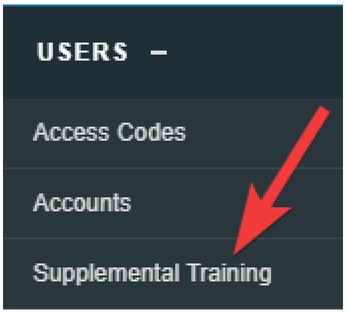
Title	Vendor	Instructor	Location	Description	Attachment	Start Date	End Date	Expiry Date	Price
OR Clinical Shift			Thunder Bay Regional Health Sciences Centre		clinical_hours_summary_-_or_.pdf	10/10/2014 12:00 AM	10/21/2014 12:00 AM	1/1/2015 12:00 AM	$0.00
ER Clinical Shift			Thunder Bay Regional Health Sciences Centre		clinical_hours_summary_-_er.pdf	1/1/2015 12:00 AM	1/30/2015 12:00 AM	1/29/2016 12:00 AM	$0.00

Supplemental Training Page

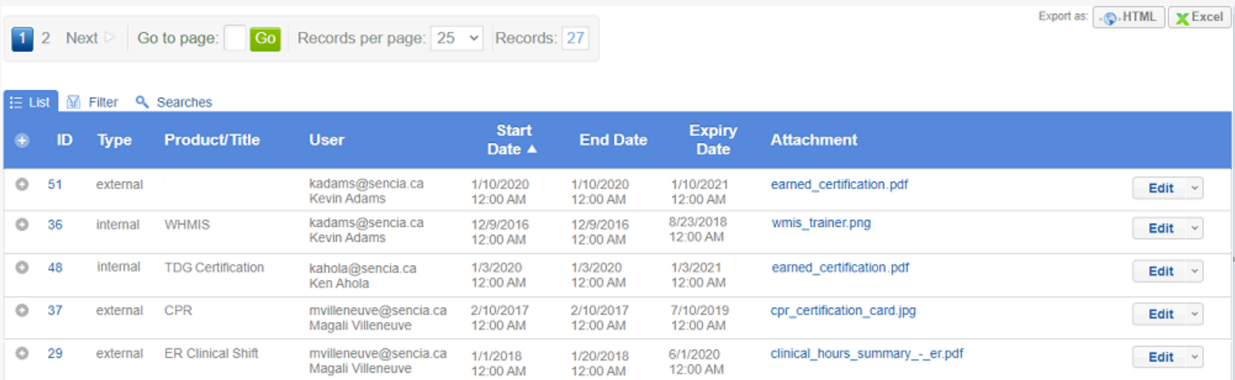
From this page you can view, sort, filter, export, delete, and edit exisiting supplemental training items for multiple users. The page displays the ID, type, associated product or title, user, various dates, and any attachments for each entry.

1. Log in with a Manager or Site Manager account type.
2. Select **Supplemental Training**. The location of Supplemetal Training is based on your account type**.**
   a. Manager accounts will find it in main navigation tab.

   b. Site Manager accounts will find it under Library in the main navigation menu.



Example of the Supplemental Training page.



ID	Type	Product/Title	User	Start Date	End Date	Expiry Date	Attachment	
51	external		kadams@sencia.ca Kevin Adams	1/10/2020 12:00 AM	1/10/2020 12:00 AM	1/10/2021 12:00 AM	earned_certification.pdf	Edit
36	internal	WHMIS	kadams@sencia.ca Kevin Adams	12/9/2016 12:00 AM	12/9/2016 12:00 AM	8/23/2018 12:00 AM	wmis_trainer.png	Edit
48	internal	TDG Certification	kahola@sencia.ca Ken Ahola	1/3/2020 12:00 AM	1/3/2020 12:00 AM	1/3/2021 12:00 AM	earned_certification.pdf	Edit
37	external	CPR	mvilleneuve@sencia.ca Magali Villeneuve	2/10/2017 12:00 AM	2/10/2017 12:00 AM	7/10/2019 12:00 AM	cpr_certification_card.jpg	Edit
29	external	ER Clinical Shift	mvilleneuve@sencia.ca Magali Villeneuve	1/1/2018 12:00 AM	1/20/2018 12:00 AM	6/1/2020 12:00 AM	clinical_hours_summary_-_er.pdf	Edit

- Optionally use Filter and Save Searches to locate specific supplemental training items.
- Optionally export the supplemental training list.

Create or Edit Training Records

There are multiple methods for creating new supplemental training records. Select the applicable method below.

Create an Internal Training Record

Internal training records are those that can be associated with exiting content in the system. For example, a WHMIS course is available on the system, but your Health and Safety officer needs additional training that is performed outside of the LMS. You can add several training records to the same product. As you enter each record, the most recent update will appear on top while a history of each record update appears below.

1. Navigate to Individual's Training Records .
2. Select **Add Supplemental Training**.
3. Select **Internal** from the drop-down menu.
4. Select the associated product from the drop-down menu. This list is the user's product enrolments.
    - If the product you need is not listed, use the **Associate to Product** button to select it and enrol the user.
    - The list contains the products available for enrolment, based on the user's group memberships.
    - The enroled product will be available in the associated product from the drop-down menu.
5. Complete the rest of the form.
6. Optionally add, replace, or delete an attachment .

7. Save.

Create an External Training Record

External training records are those that cannot be associated with existing content in the system. For example, an employee that attended a two-day off site trade seminar as part of their professional improvement.

1. Navigate to Individual's Training Records .
2. Select **Add Supplemental Training**.
3. Select **External** from the drop-down menu.
4. Complete the rest of the form.
5. Optionally add an attachment .
6. **Save**.

Edit a Training Record

1. Navigate to Training Records . Both options allow edits.
2. Select the name of the training record.
3. Make changes to editable fields.
4. Optionally add an attachment .
5. Save.

Bulk Upload Training Records

Create multiple training records associated to specific users via the Import Utility. Select the Supplemental Training import type from the drop-down menu. Note that training record attachments cannot be uploaded this way.

Create Training Record upon Certification

This feature is available to Site Managers depending on system configuration.

See Automatic Training Record upon Certification .

Manage Training Record Attachments

Each training record can have only one supporting document attached to it.

Add an Attachment

1. Create a Training Record .
2. Select the name of the training record to open the edit page.
3. Select **Choose File** at the bottom of the page. There is a list of supported files available on this page.
4. Save.

Bulk Upload Multiple Attachments

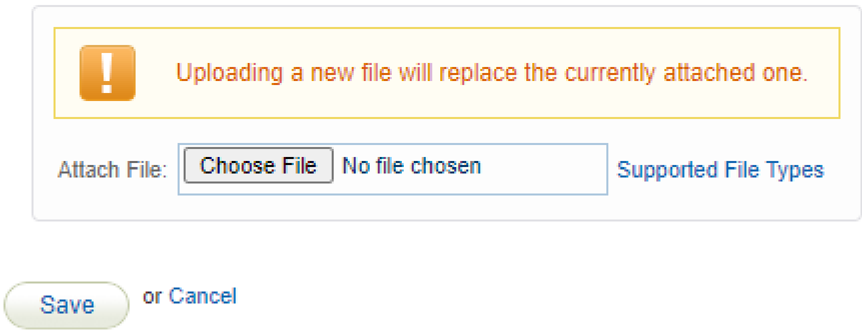
You can pre-upload training record attachments in bulk via your FTP account, and then attach the uploaded files to one individual's training records with the Manage FTP Tool.

1. Open a user's account.
2. Navigate to **Supplemental Training** .
3. Select **Add Attachment** for any training item without an attachment.
4. Choose the **Manage FTP** option and then **Upload.** See FTP File Upload for more details.
5. Select the file then **Transfer File**.
6. Close the modal window and select **Back to Previous Page** from the options menu.

Replace an Attachment

You can upload a new file to replace the attachment associated to a training record.

1. Navigate to Training Records . Both options allow file replacement.
2. Select the name of the training record to open the edit page.
3. Select **Choose File** at the bottom of the page. There is a list of supported files available on this page.



4. Save.

Delete an Attachment

You can delete the attachment associated to the training record without impacting the training record.

1. Navigate to Training Records . Both options allow file deletion.
2. Select the name of the training record to open the edit page.
3. Select the **Delete** icon at the bottom of the page under Attachment.

4. Confirm the deletion.

Training Record Availability

Training record availability can be managed using several methods. Select a method below to learn more.

Set an Expiry Date

See Create a Training Record .

An email notification may be enabled to alert users of an upcoming training record expiry.

Expiries are colour coded, based on their active status in the system.

- Active (green): Expiry is greater than 60 days from today
- Expiring Soon (yellow): Expiry is less than 60 days from today
- Expired (red): Expiry is date is after today

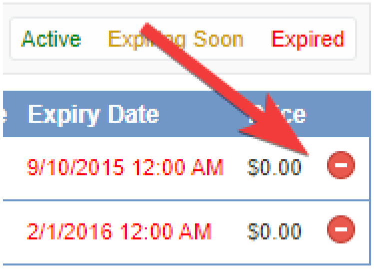
Delete Individual Training Records

Deletion permanently removes the record from the system, including associated attachment and reports.

Permanently delete one or more training records from an individual's profile.

1. Navigate to the User Accounts page.
2. Select an account name to open the individual's profile.
3. Select **Supplemental Training** from the Sections menu on the right. If you can't see the menu, show the Tool Panel .

4. Select the delete icon for the appropriate training record.



Delete Multiple Training Records

Deletion permanently removes the records from the system, including associated attachments and reports.

1. Navigate to the Supplemental Training page .
2. Optionally use Filter and Save Searches .
3. Select one or more records.
4. Choose **Delete Selected** from the Options menu. If you cannot see the menu, show the Tool Panel

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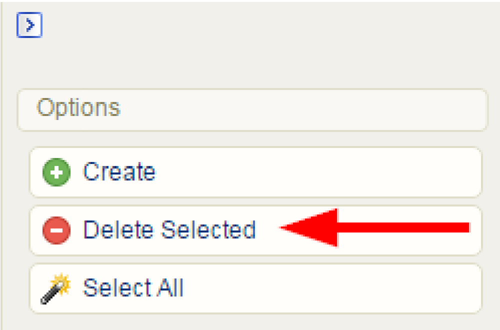

5. Confirm the deletion.