Training & CPD - Schools

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for schools for managing all tasks within the Training & CPD module in EPM Connect.

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Author: Lauren McGuire, Product Manager, Product Management

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	23rd October 2025
Summary of Change	Changes to improve clarity
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Overview

EPM's Training and CPD module offers a comprehensive and efficient way to manage staff development in line with both CPD requirements and mandatory training obligations. Easily assign training activities and course collections to individuals or groups across the school or trust, with the flexibility to configure priority levels as well as set customised completion and review dates.

Set a percentage pass rate for staff members and an approval process for courses to ensure that training is distributed quickly and to the right employees. Track Continued Professional Development (CPD) hours and download training records and certificates at the click of a button.

Empower employees to take ownership of their professional development via our user-friendly self-service portal, where they can view, request, and complete training, track their CPD hours, and download certificates. With built-in tracking and approval workflows, the system ensures consistent, transparent, and low-effort management of training across your organisation.

Add online and offline courses and maintain all training records in one centralised location, with the ability to view training requests, overdue training and completed training across all the entire school or trust.

Any course indicated by a icon can only be managed at Trust level.

Anything that has been added at school level, can be edited using the icon. Anything that has been added at school level will only appear within the course library of that school.

General Guidance

Column headings in a bold blue text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the for drop-down list, select the rule for your search then add the criteria in the text box below.

Summary (including Metrics)

The **Summary** section of the module provides a variety of metrics, including **Total Logged Training, Completed Training, Incomplete Training** and **Overdue Training.**

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options is displayed.
2. Select **Summary**. The Summary page is displayed and a variety of metrics are displayed across the top of the screen.
3. To view more details, click the arrow in the top right of any of these metrics to move into specific details, the training courses these relate to and the users they were assigned to.
4. Scroll down to view **Training to Approve, Yearly Course Completions** and **Monthly Completions** which relate to the last 12 months.

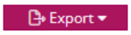
   At a school level you will also be able to view **Training to Approve** showing any training that needs to be approved. This is customisable in **Settings**.

View current courses available for distribution

Courses must be moved into the **Course Library** page in order to distribute them to users and employees. If the course you are looking for is not here, follow the steps in **Add a course**.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.

   This list can be exported by clicking on the **Export** button.

   Settings can be customised within the **Settings** area of the module – see the **Settings** section at the bottom of the guide.

Add a course

You can create a number of bespoke courses, both offline and online, enabling you to maintain all training records in one centralised location.

Any course indicated by a icon can only be managed at Trust level.

Anything that has been added at school level, can be edited by using the icon. Anything that has been added at school level will not appear within the course library of other schools within the Trust.

Create an online course

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.
3. At the bottom of the page click the **+ Create Course** button. The **New Course** window is displayed.

4. The **Course Type** will default to **Online** however you can change this to **Offline** in the drop-down menu should you wish to add an offline course.
5. In the **Title** text box, create a title.

   If there are multiple courses that are similar, we suggest adding a date or number for example Health & Safety Course 1 or Health & Safety 13/05/22.

6. From the **Category** drop-down box, select a category.

   Categories can be customised within the **Settings** area of the module – see the **Settings** section at the bottom of the guide.

7. From the **Availability** drop-down menu, select the employees who will have access to this course, choosing from **Assignment only** (only for users who have been assigned to this course), or **Available to All** (available for all employers to select from their list of available courses).
8. In the **Description** text box, add a description.
9. In the **URL** text box, add a URL.
10. In the **Due Within** text box add a date or set to None if not applicable.

    The **Due Within** date provides the date in which the training should be completed within once assigned to an employee. Once this time-period has lapsed, the employee and the person who has assigned the course will receive a notification that the course is overdue and the course will appear in **Incomplete Training** within the **Summary** screen. If it is set to **Global**, this will default to the global (i.e. standard) time period set within **Settings**. However, this can be over-ridden with any time period you wish.

11. Add an **Expiry** date or set to *None* if not applicable.

    The **Expiry** date is more relevant when looking at auto-renewal. When you distribute courses, you can select if you want them to auto renew or not. If you select yes, it will use this expiry here. If set to auto-renew it will auto-renew and send out any update the course material.

12. Click **Save** to finish. This will now sit withing your **Central Courses** library for you to manage and distribute.

You can update any details at any time by clicking the pencil icon on the far right of any course.

13. Edit the details ensuring you click **Save** to finish.

Create an offline course

Offline courses can be created in exactly the same way as online courses, with a number of additional fields available to provide more detail.

1. Follow the steps within **Create and online course** above but add in an optional **Location**, **Tutor** and **Agenda** (these are not mandatory fields).
2. Ensure all steps above have been completed and click **Save** to finish. This will now sit within your **Central Courses** library for you to manage and distribute.

Create a new course collection

Course collections are groups of courses. It can be useful to set up course collections for inductions, for specific departments or for groups of courses that are similar – for example Safer Recruitment courses or courses with multiple parts.

1. To create a new collection, click the **Collections** tab, next to **Training Courses**.
2. Click **+ Create Collection**. A new **Create Course Collection** window is displayed.

3. In the **Title** text box, enter a title for the document.
4. In the **Description** text box, enter a description for the document.
5. Click **Save** to finish.

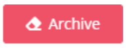
Archive/re-activate courses

Should you wish to tidy up your courses, or archive any courses that you no longer wish to be available for distribution this can be done using the following steps:

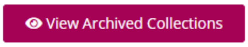
Any course indicated by a icon can only be managed at Trust level.

Anything that has been added at school level, can be edited by using the icon. Anything that has been added at school level will not appear within the course library of other schools within the Trust.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.
3. To archive a course, click the red cross. A new **Archive Course** window is displayed.
4. Click the **Archive** button to archive the course.



5. To undo this at any time or to re-activate a course scroll to the bottom of the courses listed and click the **View Archived Courses** button.



6. Scroll down the list of archived courses and click the double arrows icon on the far right hand side of the course listed. The course will be re-activated and will now show within **Central Courses** library for you to manage and distribute.

Distribute courses

Courses can be distributed to both individual users and user groups.

For ease of use, we recommend setting up **User Groups** for each school within the Trust across different groups, for example St John's School Teaching, St John's School Admin, St John's School Academic Support Staff in **Settings.**

There is an option to distribute courses en masse or to single users.

The benefit of distributing to a large group is in the time it will save; however, the limitation is that you will need to set whether a course is **Mandatory**, **Critical** or **Optional** for all the users within the group. It also means that should you need to remove distribution to one user within the group, this will remove distribution to all users. There may therefore be times when you wish to distribute courses to individuals via **+ Add User**.

Distributing course to individual users allows you to set a course as **Mandatory**, **Critical** or **Optional** for each individual user. Distributing course en-masse does not allow flexibility in this setting. Distributing courses to individual users also allows you to remove distribution to a single user within the group. Where a user may be deleted in the future or where the importance of the course varies across users varies, it is best to distribute these courses to individuals via **+ Add User**.

Any course indicated by a icon can only be managed at Trust level.

Anything that has been added at school level, can be edited by using the icon. Anything that has been added at school level will not appear within the **Course Library** of other schools within the Trust.

Some courses can only be managed at Trust level. These are indicated by a icon.

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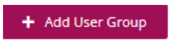
1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.
3. Find the course you wish to distribute and click on the pencil icon.
4. Scroll down to the blue tabs and click the **Distribution** tab.
5. Click either **+ Add User** or **+ Add User Group**.

Distribute to User Groups

1. Click **+ Add User Group**.



2. From the **User Group** drop-down menu, select a group.
3. From the **Required** drop-down menu, select either ***Critical, Mandatory*** or ***Optional.***
4. Move the **Auto-Renew** toggle to **YES** or **NO**.

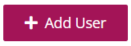
   If set to **YES**, once the course reaches its expiration the system will automatically redistribute it. If set to **NO** the system will not automatically redistribute the course.

5. Click **Save** to finish.

6. This will now appear under **User Groups** and show the number of employees this has been sent to.

Distribute to single users

1. Click **+ Add User**.



2. Select a group from the **Central User Group** drop-down list
3. From the **Required** drop-down list select the option you require – either ***Critical, Mandatory*** or ***Optional***.
4. Change the **Auto-Renew** toggle to **YES** or **NO**.

   If set to **NO** the system will not automatically redistribute it. If set to yes, once it reaches its expiration the system will automatically redistribute it.

5. Click **Save** to finish.

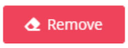
6. Repeat the process for each user to which you wish to distribute the course. The information will now appear under **User Groups** and show the number of employees each course has been sent to.

Delete Distribution to single users

Should a course be distributed incorrectly, or should an employee no longer be eligible for a course, the course can be deleted from their distribution list.

Please note that distribution to **User Groups** cannot be deleted.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.
3. Find the course you wish to manage and click the **Course Title**.
4. Select the **Distribution** tab.
5. Scroll down to the list of **Users** and click on the red cross icon. A new **Remove Distribution** window is displayed.
6. Click the red **Remove** button to remove distribution of that course from that user.



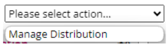
Distribute en masse

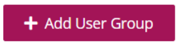
This is useful in distributing courses to a variety of user groups.

If the course library is built and managed centrally by the Trust, only the Central Team will be able to manage and distribute courses. Schools can only view courses added by the Trust Central Team.

Distribute courses with the same requirements and Auto renew status

This is useful if you wish to distribute multiple courses with the same criteria – i.e. marked as **Mandatory** and has the same **Auto Renew** status.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.
3. Click the **Training Courses** tab and tick the box next to each of the courses you wish to distribute.
4. Click the **Please select action…** box on the top right, above the employees listed:


5. Click **Manage Distribution** A new **Multiple Courses: Manage Distribution** page is displayed.
6. Click **+Add User Group**.


7. From the within **Central User Group** drop-down menu, select the user group.
8. From the within **Required,** drop-down menu, select **Critical, Mandatory** or **Optional.**
9. Move the toggle next to **Auto-Renew** to **YES** or **NO**.
10. Click **Save** to finish.


Distribute Course Collections with different requirements and Auto Renew status

Course collections are groups of courses packaged together for easy distribution, for example annual courses for or Induction Courses. You can create a variety of course collections for your teams.

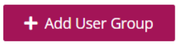
Add course

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Course Library**. The **Course Library** module is displayed and displays all current courses available for distribution.
3. Click **+ Add Course** to add new courses to the collection. A new **Add Course Collection** window is displayed.

4. From the **Course** drop-down menu select a course. If no course collections are listed, you will need to create one.
5. From the **Required** drop-down menu select *Critical, Mandatory* or *Optional*.
6. Move the **Auto-Renew** toggle to **YES** or **NO**.
7. Click **Save** to finish.

Distribute the course

1. To distribute the course, click the **Distribution** tab.
2. Click the **+ Add Other User Group** button. A new **Add Central User Group Distribution** window is displayed.



3. From the **Central User Group** drop-down menu, select a user group.
4. Click **Save** to finish.

Create a new course collection

1. To create a new collection, click the **Collections** tab, next to **Training Courses**.
2. Click **+ Create Collection**. A new **Create Course Collection** window is displayed.

3. In the **Title** text box, enter a title for the document.
4. In the **Description** text box, enter a description for the document.
5. Click **Save** to finish.

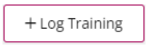
Add an individual course to a single Training Record

If there is a course that is only applicable to one single employee it can be added within the individual training record of the employee. This will not be available for distribution to any other employees.

Employees can log their own training via **My Portal**. If there is an approval process in place, any courses logged will need approval. If an approval process is not in place, any courses logged by the employee will be added to their training record.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Training Records**. The **Training Records** page is displayed.
3. Click on the eye icon on the far right of the record or click on their name. A new **(Name)'s Training Record** is displayed.

4. Click **+ Log Training** at the top of the screen. A new **Log Training for (Name)** page is displayed.



5. From the drop-down menus next to **Course, Type, Title, Category, Description, URL, Date Due, Location, Tutor, Agenda, Required, Date Due, CPD Hours** and **Date Completed**, select the options you require.
6. Click **Select Files**, to add files.

Approve Training Requests

This allows you to set up how and who approves each course. You can set up an approval process and **Approvers** in **Settings.** Settings can be customised within the **Settings** area of the module – see the Settings section at the bottom of the guide.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Approve Requests**. The **Approve Requests** page is displayed.

   Here you can view pending and completed requests.

3. Select either **Pending Requests** or **Completed Requests**.

   Here you will view the **Full Name, Training Course, Date Logged** and **Status** of each course.

   Column headings in a bold text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

   To search in a column, click on the magnifying glass in the header of the column you want to search. From the for dop-down list, select the rule for your search then add the criteria in the text box below.

4. Click the pencil icon on the far right of any of the requests to view or edit the request. A new **Approve Training Request** window is displayed.

   This allows you to view all of the details submitted by the employee.

   If this is a course they have already completed it will also show the **Outcome** and **Score**.

5. From the **Approval Status**, select **Approved, Awaiting Approval, Requires Changes** or **Rejected.**

   You can also include a **Message**, for example describing the changes that are required.

6. Click **Save** to finish. This will now sit in **Completed Requests.**

Reports

Produce reports on all training courses, completed or incomplete and view patterns in employees that are consistently failing to complete training. An automatic email will be sent every Monday to individual employees to remind them to complete incomplete training.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Training Instances**. The **Training Instances** page is displayed.
3. Select the tab you require.

   All Training displays all assigned courses.

   Incomplete Training displays all courses assigned but incomplete.

   Overdue Training displays all courses assigned but overdue.

   Once the period you set as **Due Within** when setting up the course has lapsed, the employee and the person who has assigned the course will receive a notification that the course is overdue.

   Completed Training displays all courses assigned and completed.

4. To export a report, filter using the magnifying glass icon and searching for the particular course you wish to report on and click **Export**, choosing either **Word** or **Excel** format.

   You can Export a report in Word or Excel format wherever you see the **Export** button.

Pre-set Reports

Reports relating to **Training & CPD** can be viewed by clicking on the **Reports** button at the top of the screen within the **Training Records** page.

View Training Records

View the **Training Records** of all active users.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Training Records**. The **Training Records** page is displayed.

   View the **Full Name, Courses Completed, Courses Incomplete** and **Courses Overdue** against all active users and click the magnifying glass icon to search by any of these titles.

   Column headings in a bold blue text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

   To search in a column, click on the magnifying glass in the header of the column you want to search. From the for dop-down list, select the rule for your search then add the criteria in the text box below.

   To export a report, filter using the magnifying glass icon and searching for the particular course you wish to report on and click **Export**, choosing either **Word** or **Excel** format.

3. Click on the eye icon on the far right of the record or click on their name. A new **(Name)'s Training Record** is displayed.

   Here you can view CPD Time Logged, Completed Courses and Certificates

4. Scroll down to view all completed and incomplete courses.
5. To download a certificate, click the download icon next to the record in the **Certificate** column.
6. Click the pencil icon to view the record of that particular course. A new **Edit Training Log** window is displayed.
7. Scroll down and click the **Documents** tab to view all documents or to add a document, click the **+Add Documents** button.

8. Select the **Notes** tab to view and add notes.
9. Select the **Audit Trail** tab to view the full audit trail.

   This will display when each course was started and completed, any documents and notes that have been uploaded and any changes to Approval Status.

View Previous Training Record

The module allows you to continue to view the training records of individuals after they have left the organisation. This is feature is useful regarding requests from previous employees and for historical reporting.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Training Records**. The **Training Records** page is displayed.
3. Click **View Prevous Users**. The **Previous User Records** section is displayed.

4. To export a report in either **Word** or **Excel** format, filter using the magnifying glass icon and searching for the particular course you wish to report on and click **Export**, choosing either **Word** or **Excel** format.

5. To view an individual **Training Record** click on the eye icon on the far right of the record or clicking on their name. The employee's **Training Record** is displayed.

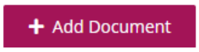
View and update Training Instances

Here you can view the **Training Instances** logged within the system. The employee will usually complete the information upon completion of the course, but this can also be updated by HR and Admin Users.

1. On the left-hand side of the EPM Connect window, click **Training & CPD**. A list of further menu options will appear.
2. Click **Training Records**. The **Training Records** page is displayed.
3. Select the relevant tab.
4. View the **Full Name, Courses Completed, Courses Incomplete** and **Courses Overdue** against all active users and click the magnifying glass icon to search by any of these titles.
5. Click the pencil icon to view the training instance. A new **+ Edit Training Log** window is displayed.
6. In the **CPD Hours** field, enter the number of hours training undertaken.
7. In the **Date Completed** field, enter a date.
8. From the **Outcome** drop-down menu, select an outcome.
9. In the **Score** field, enter a score.

Upload documents/certificates

1. Scroll down to the **Documents** tab.
2. Click the **+ Add Document** button. A new window is displayed.



3. Click **Upload File** and select the file you wish to upload.

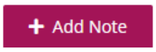
4. From the **Document Type** drop-down menu, select the document type.

   Selecting **Certificate** will save the document as a certificate and make it available for download.

5. In the **Title** field, enter a title.
6. Click **Save** to finish.

Add Notes

1. Select the **Notes** tab.
2. Click the **+ Add Note** button. A new window is displayed.



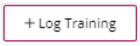
3. Click **Save** to finish.

Log training

Log training can be used to log training not assigned to you, for example training undertaken independently.

You can set whether user-logged training requires approval within **Settings**.

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Training Records**. The **Training Records** page is displayed.
4. Click the **Full Name** of the employee you wish to view. The relevant **Training Record** is displayed.
3. Click the **+ Log Training** button at the top of the screen.



5. From the **Course** drop-down menu.

   Selecting Custom will allow you to add a course not assigned to you, for example training undertaken independently.

6. From the **Type** drop-down menu, select **Offline** or **Online**.
7. In the **Title** field, enter a title.
8. From the **Category** drop-down menu, select a category.
9. In the **Description** field, enter a description.
10. In the **Location** field, enter a location.
11. In the **Tutor** field, enter a tutor.

12. In the **Agenda** field, enter an agenda.
13. From the **Required** drop-down menu, select **Critical**, **Mandatory** or **Optional**.
14. In the **Date Due** field, select a date.
15. In the **CPD Hours** field, enter the number of hours of CPD hours undertaken within this course.
16. In the **Date Completed** field, select the date the training was completed.
17. Click the **Select** files button to attach files.

Download Certificates

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Training Records**. The **Training Records** page is displayed.
3. Click on the eye icon on the far right of the record or clicking on their name. A new **(Name)'s Training Record** window is displayed.
4. Here you can view **CPD Time Logged, Completed Courses** and **Certificates**

Download individual certificates

Click the download icon next to the record in the **Certificate** column.

Download All Certificates for an employee

Click the **Download Certificates** button at the top of the screen. A zip file containing all certificates is displayed. This will be saved within your downloads within your standard files outside of the system.

Employee view - Training & CPD

The Performance Management allows your employees to view and update training via My Portal.

If there is an approval process in place, any courses logged will need approval. If an approval process is not in place, any courses logged by the employee will be added to their training record.

View assigned courses

1. On the left-hand side of the EPM Connect window, select click **My Portal**. A list of further menu options is displayed.
2. Select **My Training**. The **My Training** page is displayed.
3. Select the **To-Do** list tab to view all incomplete training assigned to you.
4. Click the **Course Title** you wish to view.
5. In the **CPD Hours** field, enter the total hours of training completed.
6. In the **Date Completed**, select the date the training was completed.

   Once a course has been completed it will move into the **All Training** tab, which will show all compelte and incomplete courses.

7. Click **Save** to finish.

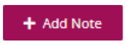
Add Documents

1. Click the **+Add Document** button. A new window is displayed.

2. Click **Upload File** to upload a file.
3. From the **Document Type** drop-down menu, select an option.
4. In the **Title** field, enter a title.
5. Click **Save** to finish.

Add Notes

1. To add documents, click the **+Add Note** button. A new window is displayed.



2. In the **Note** field, enter a note.
3. Click **Save** to finish.

Audit Trail

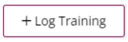
The **Audit Trail** displays every action that has been undertaken within the module. View when each course was started and completed, any documents and notes that have been uploaded and any changes to **Approval Status**.

Download certificates

1. On the left-hand side of the EPM Connect window, select click **My Portal**. A list of further menu options is displayed
2. Select **My Training**. The **My Training** page is displayed.
3. Click **Download All** in the **Certificates** box at the top of the screen.

Log Training

1. Click the **+ Log Training** button at the top of the screen. A new **Log Training for *(Name)*** screen is displayed.



2. From the **Course** drop-down menu, select the course. Further fields are displayed.
3. From the **Required** drop-down menu, select **Critical**, **Mandatory** or **Optional**.
4. In the **Date Due** field, select a due date.
5. In the **CPD Hours** field, enter the total hours of training completed.
6. In the **Date Completed**, select the date the training was completed.
7. Click the **Select files** button to add files.

Settings

Main Settings

These are the overall settings that affect the whole module. These are the Global settings, meaning they apply to all training as a default (unless changed).

1. On the left-hand side of the EPM Connect window, select **Training & CPD**. A list of further menu options will appear.
2. Select **Settings**. The **Settings** page is displayed.
3. Select the **Main Settings** tab. The tab information is displayed.
4. Move the **User Logged Training Requires Approval** toggle to **YES** or **NO**.

   If the toggle is moved to **YES** you will need to approve each time an employee completes a training course. This will be sent through as an email notification.

   This can be useful when employees log training themselves within **My Portal**.

   However, if you are distributing large numbers of courses, you may wish to move this to **NO** in order to minimise disruption.

   If toggled to **NO,** any training completed or added by employees will automatically be added to their Training Record.

5. In the **Due Within Interval** field enter a number and select **Days** or **Weeks**.

   The **Due Within** period sets the time period for completing the course.

   Once the time-period has lapsed, the employee and the assignee will receive a notification and the course will appear as **Overdue** and **Incomplete**.

   Set the default timescale in which courses must be completed within.

6. In the **Training Expiry Length** field enter a number and select **Days** or **Weeks**.

   Select the default training expiry period. Once expired, training will need to be re-undertaken.

   When adding courses, you will have the option to use the default expiry or select a custom expiry.

   The Expiry date is useful when managing auto-renewal.

   Select **Days**, **Weeks**, **Months** or **Years**.

7. Click **Save** to finish.

e-Learning Settings

E-Learning is not currently available.

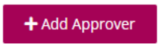
Approval Notifications

These settings allow you to set up the users who will receive email notification for training approval requests.

The **Approval Notifications** tab will only appear if categories have been added within the **Categories** tab and at least one course has been created within the **Course Library**. The appropriate **Permission** Settings will also need to have been assigned to you.

This tab will not appear until **Course Categories** have been added and courses created.

1. Select the **Approval Notifications** tab. The tab information is displayed.
2. Click the **Add Approver** button. The **Approver Information** is displayed.

   Employees are able to add any training undertaken themselves within **My Portal**.

   If you have toggled **YES** to **User Logged Training Requires Approval** within **Main Settings**, this training must be approved by a user before appearing on the employee's training record.

   Click here to set which users will receive notifications of training approval requests.
3. From the **User** drop-down menu, select the user that applies.
4. Click **Save** to finish.

Categories

This tab allows you to set your training categories.

1. Select the **Categories** tab. The tab information is displayed.
2. Click the **Add Category** button. The tab information is displayed.

3. In the **Category Name** field, enter a name.
4. Click **Save** to finish.