

Documents

- [Documents Upload and Download Using Pathways](#)

Documents Upload and Download Using Pathways

Creating a Training Intervention

Before a document can be uploaded a Training Intervention needs to be created.

How to get there?

Click on System Administration (1). With your cursor hover over System Administration (2) and navigate to Database (3) then click on Training Interventions (4). Then click on Add (5).



What to do?

All the following fields are mandatory and needs to be selected or entered:

- Fill in the Intervention Name (1), this will help you to find the intervention later.
- Select from the drop down the Pathway step Type (2).

For a document upload the Pathway Step Type needs to be Assignment.

- Select your Learning Type (3).
- Choose the Nature of Learning (4).
- Select from the drop down list your Training Classification (5).
- Select your Training Category (6).
- Choose your Skills Priority (7).
- Make sure the Add To Learner Record (8) box is ticked.
- Then click Save (9) to save this intervention.

Training Intervention Detail

Save Training Intervention Save Add New Back

Code AB101

Document Reference Number

Training Intervention Name 1 Accounting For Bankers

Description

Rich text editor for description with toolbar (Source, Bold, Italic, Underline, etc.)

Pathway Step Type 2 Classroom

Training Provider ABC - International

Learning Type * 3 Classroom

Nature of Learning * 4 Formal Institution

Training Classification * 5 Local Training

Legislative First Category

Legislative Second Category

Mobile Application Template The template contains a transcript and is viewed on the mobile application when the attempt is completed and has been synced to the LMS from the mobile application

Is PIVOTAL Training

Hours 0

Automatic Certification

SAQA Accreditation

Allow viewing of transcripts Only applicable to Assessment Pathway Step Type training interventions. When selected, all transcripts can be viewed in a single view on an employee (Manage Employees -> Employee Development -> Assessment List)

Documentation Required Documentation needs to be uploaded when a learner record is created for this intervention. Licence approval workflows will only be created when documentation is provided.

Training Category * 6 A - Bursaries

Sub Category

Skills Priority * 7 Specialist Financial Skills Development

Leadership options

Update mentor manually Only applicable when this training intervention forms part of a learnership's requirements. When selected a mentor needs to be selected for this training intervention. If not selected, an employee's line manager will be their mentor on this training intervention.

For NQF aligned courses only

NQF Level

NQF Band

Credits * 0

Training Scheduling Options

The below values are used as defaults when scheduling training through the Training Scheduling module.

Training Scheduling Category Other

Participants Minimum * 0 Maximum * 0

Outcomes

Rich text editor for outcomes with toolbar

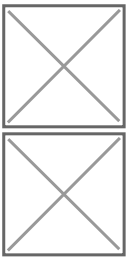
Prerequisite

Rich text editor for prerequisite with toolbar

Creating a Pathway With An Assignment Step

How to get there?

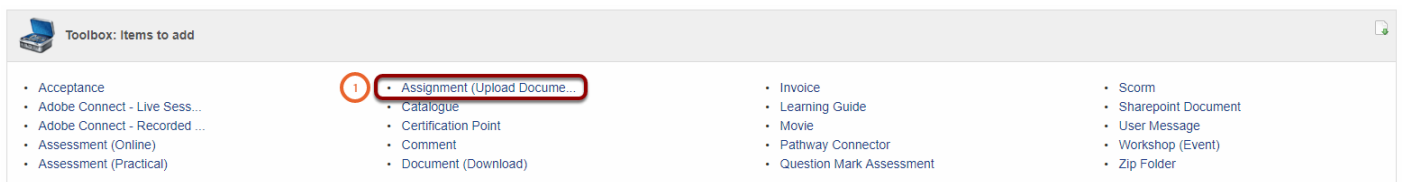
Navigate and click on System an Administration (1). With your cursor hover over Modules (2). Navigate to e-Learning (3), then Learning Management (4), then Maintain Learning Pathway (5).



What to do?

Select the pathway you want to use for the document upload and add an Assignment step.

- Click on Assignment (Upload Documents) (1) to create the Upload Documents pathway step. A new window will open.
- On the new window insert the Custom Main Header (2).
- Insert the Heading (3).
- Tick the box Log to Learner Record (4).
- Search for the Training Intervention (5) you have created for your document uploads.
- Select Save (6).



Custom Main Header **2** Upload Your Documents (Custom main heading on top of pathway step)

Heading **3** Please click here to upload your document * (Heading inside pathway step)

Description

Log to Learner Record **4** If this setting is off, no learner record will be created when a user completes this step.

Training Intervention **5** Document Upload

Lock Pathway Step

6 Save Save Add New Delete Close

How The User Can Upload a Document

When the assignment pathway step was created and your user is on the Target Audience, then the user should be able to see the pathway and upload their documents.

Log in to the Signify system with your Username and Password then:

- Navigate to and click on LMS Portal (1).
- Launch the Pathway (2) were you created the Assignment step in the instructions above.

The screenshot displays the Signify LMS Portal interface. On the left, a navigation sidebar lists various options, with 'LMS Portal' highlighted and marked with a red circle containing the number '1'. The main content area features a grid of course cards. The 'Document Upload Step' card is highlighted with a red border and a red circle containing the number '2'. Other visible cards include 'Microsoft Office', 'Microsoft Excel', 'JZ TP30642', 'JZ Connector Pathway B', and 'Assignment and Moderation - Jan 2019'.

- Click on Start (3) to open the pathway.



- On the Upload Your Documents pathway step click on the Add (4) button to upload your documents.
- A new pop-up window will load.



- On the File Uploader window, click on the field (5) and select your document on your computer.
- Wait for the file to upload, you will be redirected to the pathway.

File Uploader

Note that only one file may be uploaded at a time. The Document Title and Description fields are optional - enter content into these fields before specifying the file to be uploaded in the area below.

Document Title:

Description:

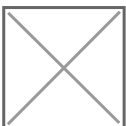
Upload your files to the server here



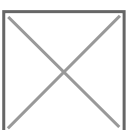
Cancel

- Click on Actions (6) to download your document or to upload a new one.
- When you are sure your document is correct click on Submit for Review (7).

Note: When you have clicked on Submit for Review (7) you will not be able to upload a new document and you will not be able to delete the old document. Only the system administrator will be able to edit documents.



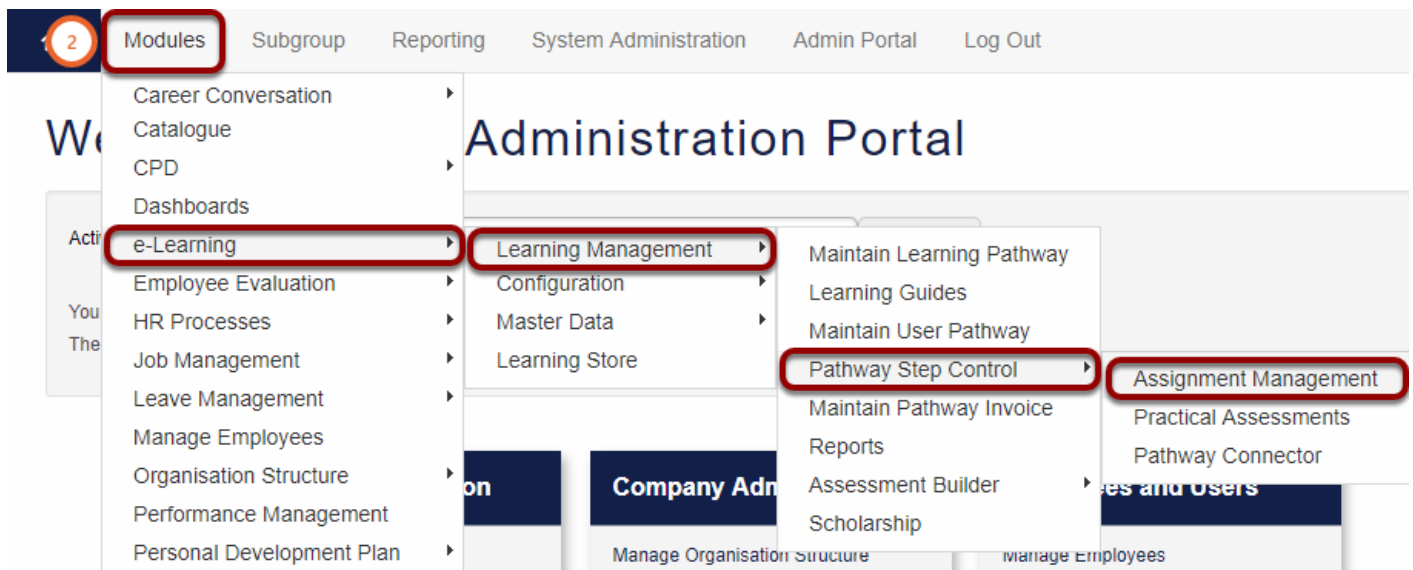
- Read through the terms displayed and click on Confirm (8).
- A learner record will be created for the document and the administrator will be able to view your document.



How the Administrator can edit or delete an uploaded document

How to get there?

Click on System Administration (1). With your cursor hover over Modules (2) then Navigate to e-Learning | Learning Management | Pathway Step Control | Assignment Management.



What to do?

Search for the user and the pathway step were you would like to edit or delete the document.

- To search click on the Hide/Show (1) button.
- Select the Pathway Step (2).
- Select the Pathway Step Status (3) from the drop down list.
- Select the Subgroup (4).
- Choose the date when the learner record was created, Learner Record Start Date Between (5).
- Enter the users details as required (6).
- Then click on Search (7).

Assignment » Control Panel

Search 1 Hide

Pathway Step 2
 Pathway Step Status 3
 Subgroup 4
 Include Terminated Employees
 Learner Record Start Date Between 5 and

Employee Number
 Employee Name
 Employee Surname 6
 Employee ID Number

7

- Click on Actions (8) then Edit (9) to edit or delete this Assignment.

[+ Add New Assignment](#)
i Competent i Not Yet Competent i Feedback Provided i Submitted i Default Status

Actions	Employee	Pathway	Learner Record	Assessed	No. of Docs
<input type="button" value="Actions"/> 8 <input type="button" value="Edit"/> 9 <input type="button" value="Comments"/>	Captain Kurk (Captain Kurk)	i Document Upload Step Upload Your Documents	i Document Upload		1

«« « 1 » »»

- You can click on Add (10) to add a document to this assignment.
- Click on Actions (11) then Edit (12) to edit or delete this document.

Note that the Delete button is locked, follow the steps below to unlock the button.

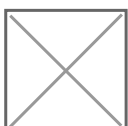
Documents | Assessments | Internal Moderations | External Moderations

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Actions	Document Title	Uploaded By	Comment	Edited By	Visible To Learner	Locked	Delete
<input type="button" value="Actions"/> 11 <input type="button" value="Download"/> <input type="button" value="Delete [Locked]"/> <input type="button" value="Edit"/> 12	2337391_Manage_Employees.pdf	Captain Kurk 2019/03/15 07:23:44 AM		Captain Kurk 2019/03/15 07:49:44 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Click on the tick box Locked (13) to unlock the delete button.
- Then click on Save (14).

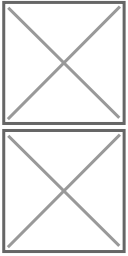
The document can now be deleted. When a document is deleted it is permanent and cant be recovered.



Create a Pathway With a Document (Download) Step

How to get there?

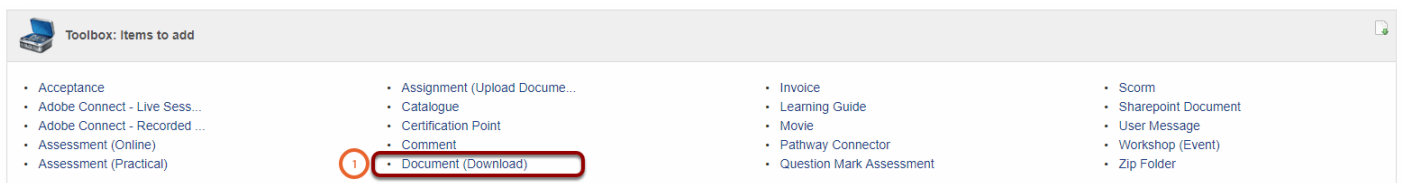
Navigate and click on System an Administration (1). With your cursor hover over Modules (2). Navigate to e-Learning (3), then Learning Management (4), then Maintain Learning Pathway (5).



What to do?

Select the pathway you want to use for the document download and add a Document (Download) step.

- Click on Document (Download) (1) to create the Document (Download) pathway step. A new window will open.
- On the new window insert the Custom Pathway Heading (2).
- Click on this field or drop file here to upload a file (3).
- Click on Save (4).



File Uploader

In Edit mode, only one file can be uploaded at a time. Ensure that you complete the Custom Heading before you attempt to upload the document.

Custom Pathway Heading: (50/50)

Reference Heading:

Description: (500/500)

Allow Not Logged In Download

Lock Pathway Step

Upload your files to the server here

Drop file here.

Or

Click here.

How The User Can Download a Document

By Using a Pathway Step

When the Assignment pathway step was created and your user is on the Target Audience, then the user will be able to see the pathway and download the documents.

Log in to the Signify system with your Username and Password then:

- Navigate to and click on LMS Portal (1).
- Launch the Pathway (2) were you created the Assignment step in the instructions above.

- Click on Start (3) to open the pathway.



- On the Download Your Documents pathway step click on the Download (4) button to download your documents.
- Your document will download in your browser (5).

Download Your Documents -

By Using My Achievements

Log in to the Signify system with your Username and Password then:

- Navigate to and click on LMS Portal (1).
- Click on the My Achievements (2) tab.
- Click on COURSE (3).
- Navigate to the course and click on the Folder icon (4).
- A new window will now open.

The screenshot shows the Signify LMS Portal interface. The left sidebar contains navigation options, with 'LMS Portal' highlighted by a red box and a callout '1'. The main content area has a top navigation bar with 'My Achievements' highlighted by a red box and a callout '2'. Below this, there are two cards: '0 TRANSLATED NEXT 0 points' and '1 COURSE', with the latter highlighted by a red box and a callout '3'. A table below shows a course entry 'Document Upload' with a folder icon highlighted by a red box and a callout '4'. A callout '5' points to the folder icon in the table row.

Badge	Course	Dates	Compliance Date	Completed / Competent	Score
	Document Upload	Start: 2019/03/15 End: 2019/03/15		Completed: ✓ Competent: ✗	0

- The user can now click on the document to download it on your browser (5).

