

# Documents

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

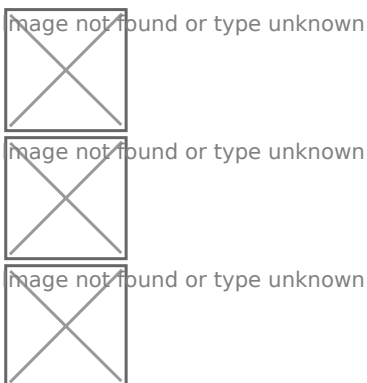
# Documents Upload and Download Using Pathways

## 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.

Save Add New Back

AB101

Accounting For Bankers

Source | Save | Undo | Redo | Find | Link | Unlink | Image | Table | List | Text | Code | Help

**B** *I* U  $\times_0 \times^*$

Styles - Format - Font - Size - A- A+ ?

Classroom

ABC - International

Classroom

Formal Institution

Local Training ▼

0

 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)

**i** 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.

A - Bursaries

Specialist Financial Skills Development 7

 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.

defaults when scheduling training through the Training Scheduling module.

Other

Minimum \*  Maximum \*

Source


















































Format

Font

Size

A

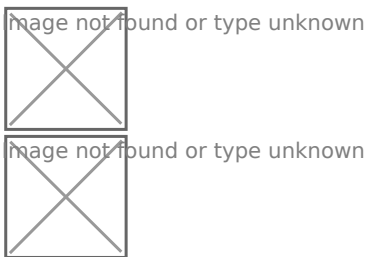
?

Source                                                    

# Creating a Pathway With An Assignment Step

## How to get there?

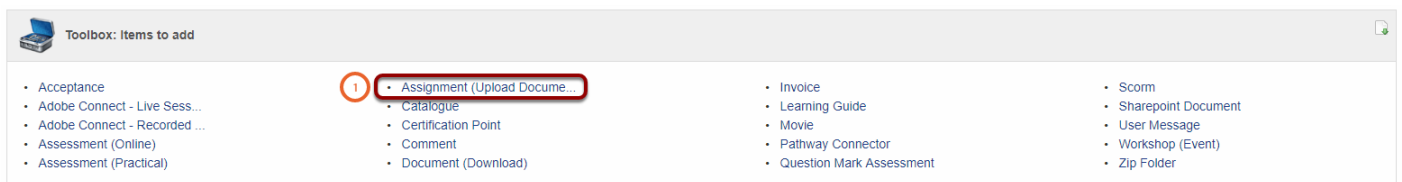
Navigate and click on System an Administration (1). With your cursor hover over Modules (2). Navigate to e-Learning (3), then Learning Management (4), then Maintain Learning Pathway (5).



## 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

Source |

**B** *I* U ~~S~~  $\times_2$   $\times^2$  |  $I_x$  | | | |

Styles | Format | Font | Size | | ?

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

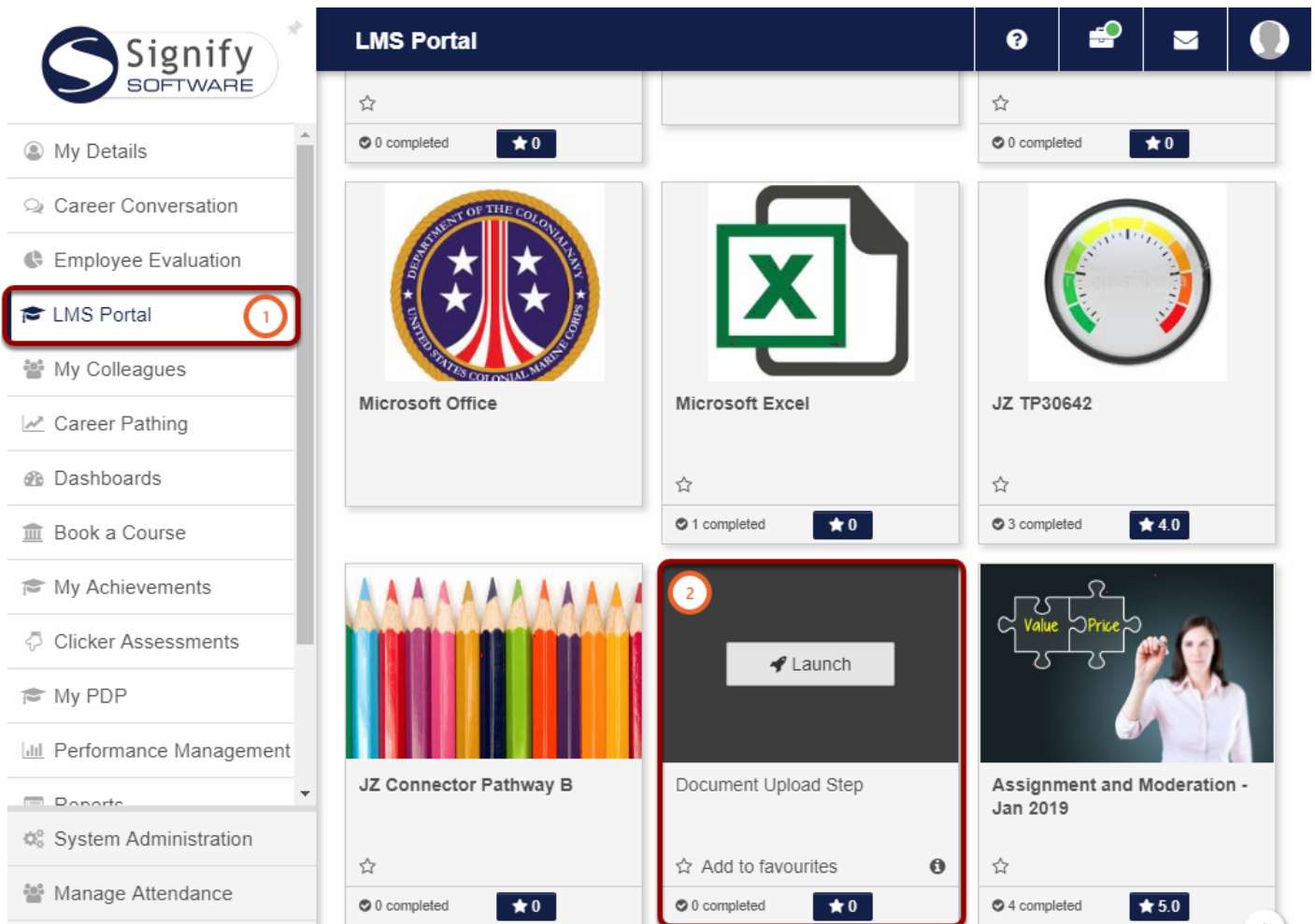
Close

# 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.



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

image not found or type unknown



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

image not found or type unknown



- 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.

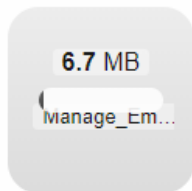
Document Title:

Document Title

Description:

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.

Image not found or type unknown



- 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.

Image not found or type unknown

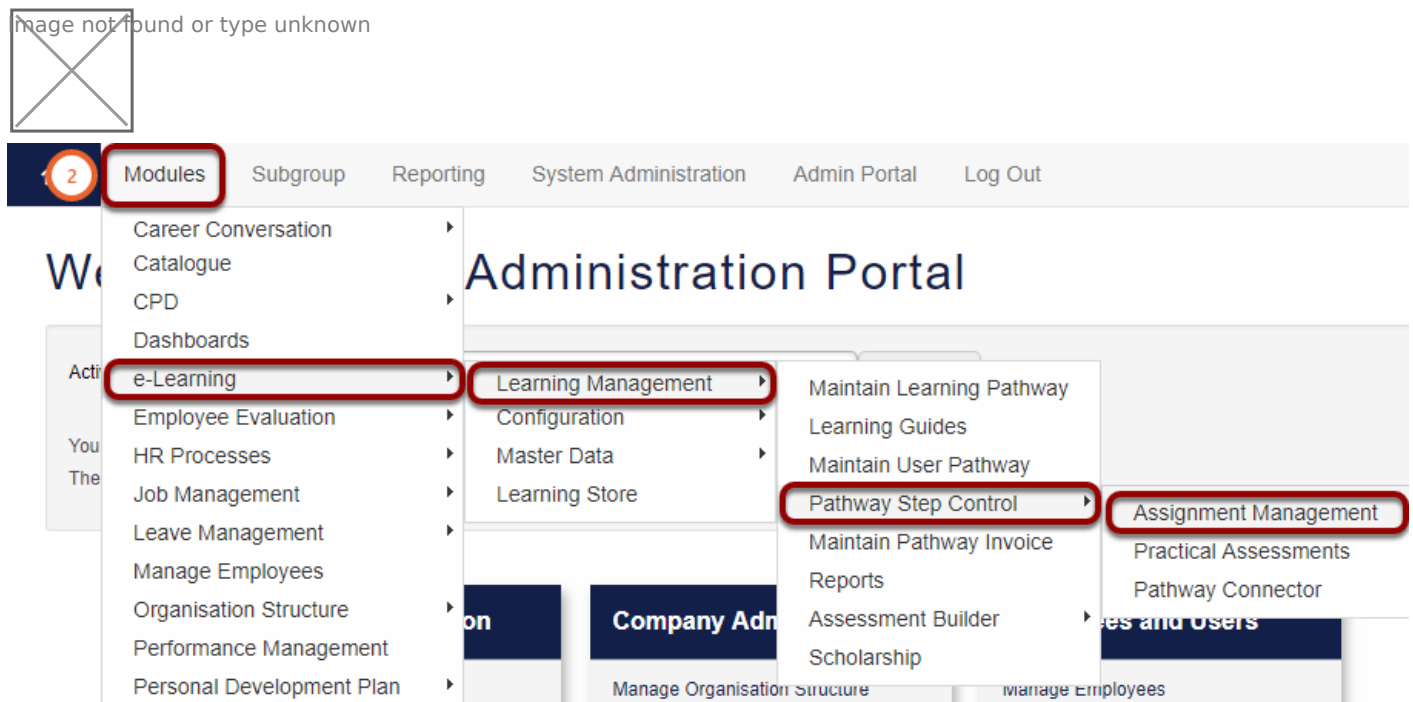




# How the Administrator can edit or delete an uploaded document

## 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 Document Upload Step - Upload Your Document

Pathway Step Status 3 Submitted

Subgroup 4 All Employees

Include Terminated Employees ☐

Learner Record Start Date Between 2019/03/15 5 and

Employee Number Captain Kurk

Employee Name

Employee Surname

Employee ID Number

7 Search Clear

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

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

Actions	Employee	Pathway	Learner Record	Assessed	No. of Docs
<span>8</span> Actions <span>9</span> Edit	Captain Kurk (Captain Kurk)	Document Upload Step Upload Your Documents	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.

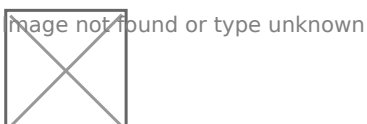
Documents Assessments Internal Moderations External Moderations Update Status

10 + Add View Comments

Actions	Document Title	Uploaded By	Comment	Edited By	Visible To Learner	Locked	Delete
<span>11</span> Actions <span>12</span> Edit	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).

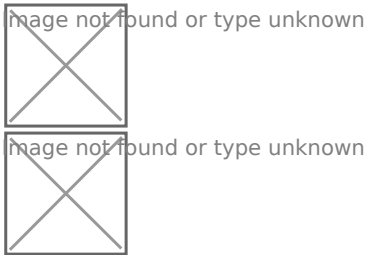
The document can now be deleted. When a document is deleted it is permanent and cant be recovered.



# Create a Pathway With a Document (Download) Step

## How to get there?

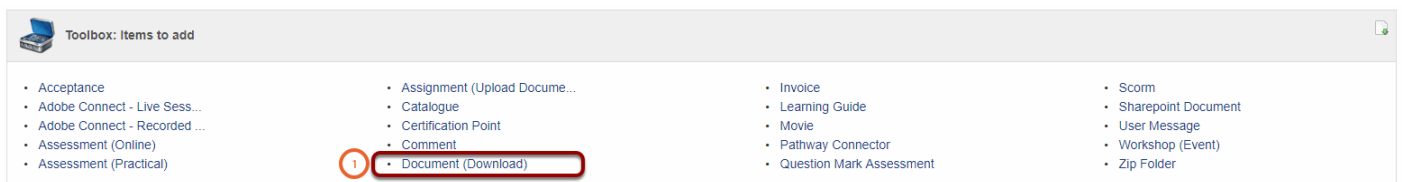
Navigate and click on System an Administration (1). With your cursor hover over Modules (2). Navigate to e-Learning (3), then Learning Management (4), then Maintain Learning Pathway (5).



## 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: 2  (50/50)

Reference Heading:

Description:  (500/500)

Allow Not Logged In Download ☐

Lock Pathway Step ☐

Upload your files to the server here

3

Drop file here.  
Or  
Click here.

4

# 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.

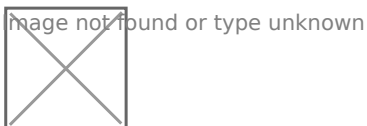
**Signify SOFTWARE**

**LMS Portal**

My Details  
Career Conversation  
Employee Evaluation  
**LMS Portal** (1)  
My Colleagues  
Career Pathing  
Dashboards  
Book a Course  
My Achievements  
Clicker Assessments  
My PDP  
Performance Management  
Reports  
System Administration  
Manage Attendance

Microsoft Office  
Microsoft Excel  
JZ TP30642  
JZ Connector Pathway B (2)  
Document Upload Step  
Assignment and Moderation - Jan 2019

- 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 -

Download Your Documents

Click on the link above to download your Documents

5915507\_Performance\_Management\_Version\_V8.pdf

Download (4)

# 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. On the left is a sidebar menu with items: My Details, Career Conversation, Employee Evaluation, LMS Portal (highlighted with a red box and callout 1), My Colleagues, Career Pathing, Dashboards, Book a Course, My Achievements, and System Administration. The main header is 'LMS Portal' with a search bar and filters. Below the header are tabs: Training Requirements (0), e-Learning Programmes (28), Book a Course (0), and My Achievements (1, highlighted with a red box and callout 2). Under the My Achievements tab, there are two cards: '0 TRANSLATED NEXT 0 points' and '1 COURSE' (highlighted with a red box and callout 3). To the right of these cards are 'PDF' and 'Excel' download buttons and a 'ON YOUR MARKS' badge. Below the cards is a table with columns: Badge, Course, Dates, Compliance Date, Completed / Competent, and Score. The table has one row for 'Document Upload' (callout 4 points to a folder icon next to the course name). The 'Dates' column shows 'Start: 2019/03/15' and 'End: 2019/03/15'. The 'Completed / Competent' column shows 'Completed: ✓' and 'Competent: ✗'. The 'Score' column shows '0'. Callout 5 points to the folder icon in the 'Course' column.

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).

