

Add a Training Intervention

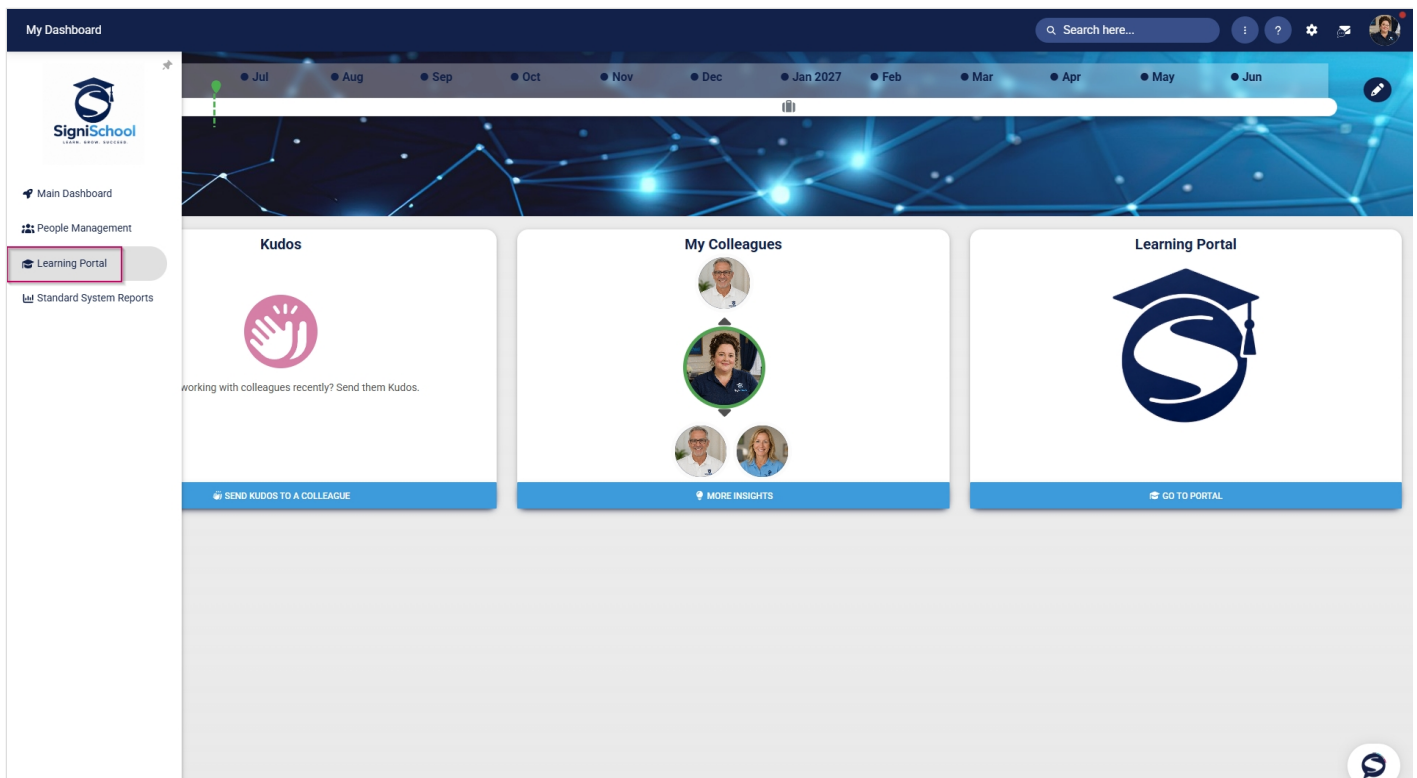
Training interventions are used to track a learner's academic progress. Each learning activity or assessment will have its own training intervention. Training interventions can be created in two ways:

- Manually through the training intervention builder
- Automatically through the training intervention import functionality

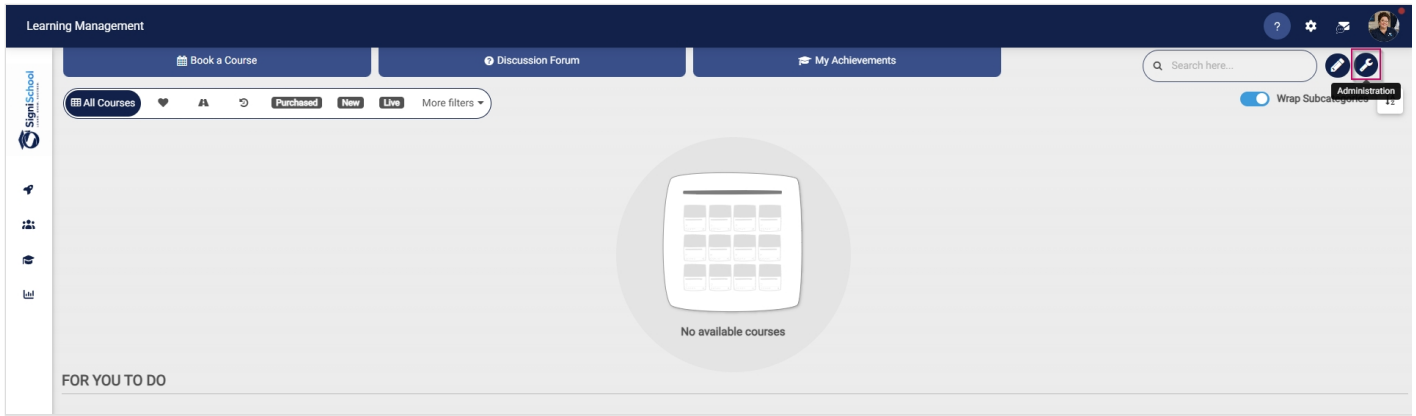
Both methods will be shown below.

Method 1: Add training interventions manually

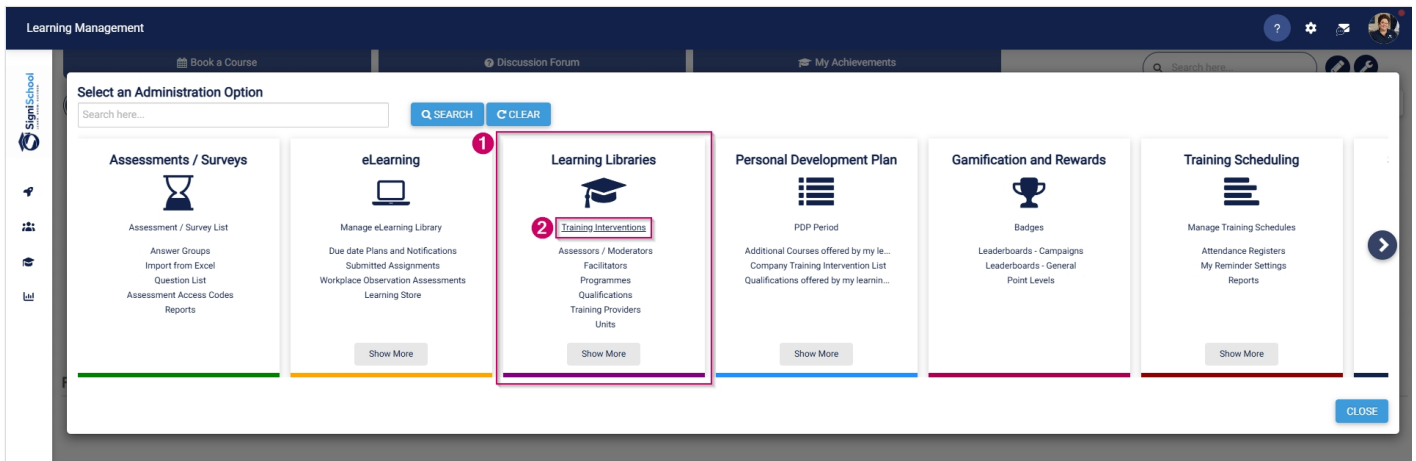
- Hover over the **sidebar** menu, then click **Learning Portal**.



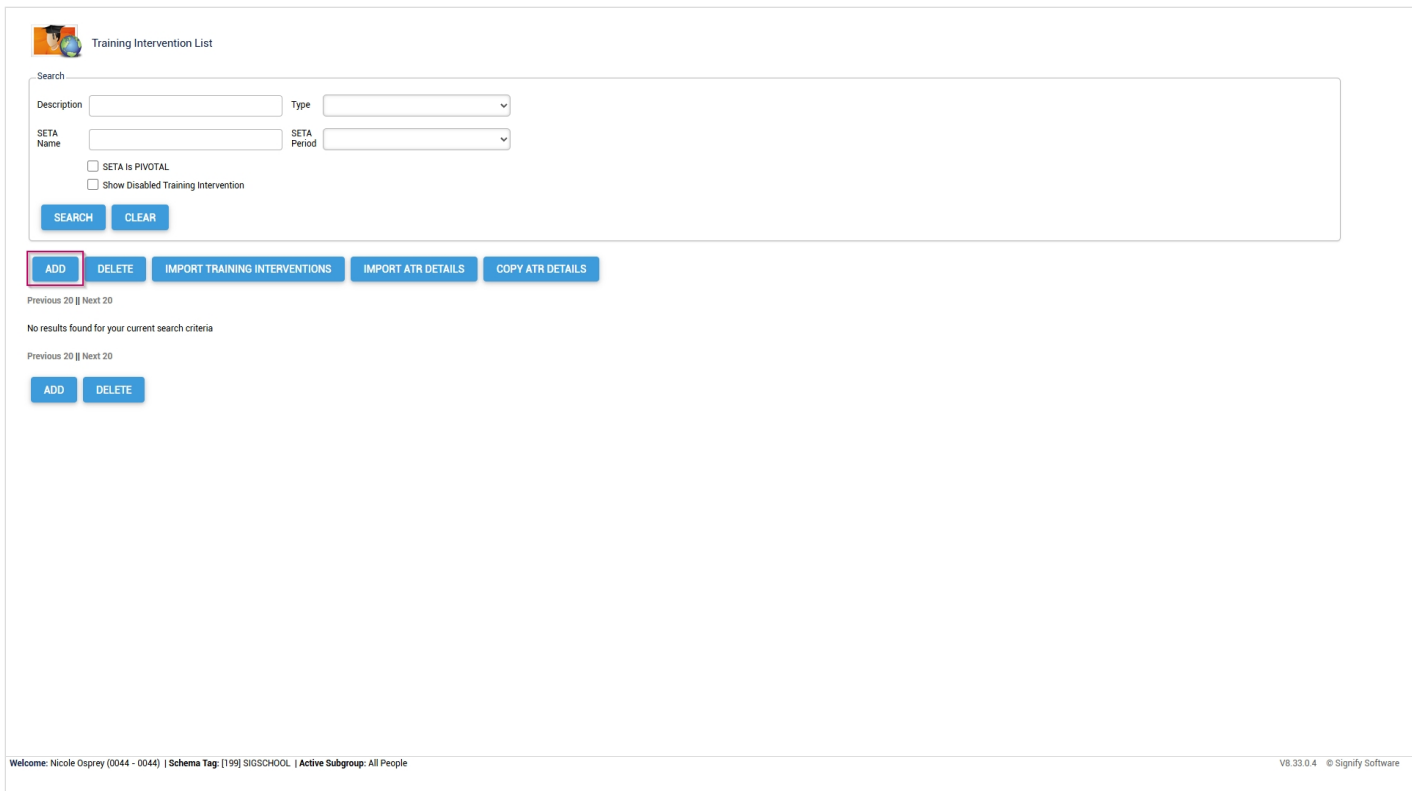
- Click the **spanner icon** to access the system's **Administration** menu.



- On the **Learning Libraries** card, click **Training Interventions**.



- The **Training Intervention Library** will open. This is where training interventions can be created, edited, or deleted. To add a new training intervention, click **ADD**.



- The training intervention editing screen will open.
 - **Please note that all the fields marked with an asterisk (*) are required.**
 - For our example, we will only fill out the necessary fields, but you can add more details if desired.

It is recommended to use a naming convention to standardise the training interventions. This ensures it is easy to maintain the data integrity of the Training Intervention Library while also improving the quality of system report outputs.

- Add an appropriate **name** for the training intervention.

The screenshot displays the 'Training Intervention Detail' form. At the top, there are navigation tabs: 'Training Intervention List', 'Costing Structure', 'Documents', 'MIA Registration', 'Pricing Cost', 'Link Competencies', 'Link Unit Standards', 'Related Courses', 'Pathway Rules', and 'Assessors'. Below these are buttons for 'Save Training Intervention', 'Save Add New', and 'Back'. The form fields include:

- Code:
- Document Reference Number:
- Training Intervention Name*:
- Description: A rich text editor with a toolbar containing options for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, quote, insert link, insert image, insert video, insert audio, insert table, and insert table of contents.
- Pathway Step Type:
- Training Provider:
- Learning Type*:
- Nature of Learning*:
- Training Classification*:
- Legislative First Category:

At the bottom of the page, the footer reads: 'Welcome: Nicole Osprey (0044 - 0044) | Schema Tag: [199] SIGSCHDOL | Active Subgroup: All People' on the left and 'V8.33.0.4 © Signify Software' on the right.

- Select the **type** of training intervention from the **Pathway Step Type drop-down menu**

Pathway Step Type: Certification Point

Training Provider: [Empty]

Learning Type: [Empty]

Nature of Learning: [Empty]

Training Classification: [Empty]

Legislative First Category: [Empty]

Legislative Second Category: [Empty]

Mobile Application Template: [Empty] 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:

Is Mandatory: This is only for reporting purposes.

Hours:

Automatic Certification:

SAGA 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.

Exclude from Reports: Only available on specific reports

Training Category: [Empty]

Sub Category: [Empty]

Skills Priority: [Empty]

Leavership options

Update mentor manually: Only applicable when this training intervention forms part of a leavership'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.

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- Select the **Learning Type** from the **drop-down menu**.

Pathway Step Type: Certification Point

Training Provider: [Empty]

Learning Type: [Empty]

Nature of Learning: [Empty]

Training Classification: [Empty]

Legislative First Category: [Empty]

Legislative Second Category: [Empty]

Mobile Application Template: [Empty] 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

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Automatic Certification:

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Exclude from Reports: Only available on specific reports

Training Category: [Empty]

Sub Category: [Empty]

Skills Priority: [Empty]

Leavership options

Update mentor manually: Only applicable when this training intervention forms part of a leavership'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.

- Select the **Nature of Learning** from the **drop-down menu**.

Pathway Step Type

Training Provider

Learning Type

Nature of Learning

Training Classification

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

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Hours

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SQA Accreditation

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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.

Exclude from Reports Only available on specific reports

Training Category

Sub Category

Skills Priority

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.

- Select the **Training Classification** from the **drop-down menu**.

Pathway Step Type

Training Provider

Learning Type

Nature of Learning

Training Classification

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

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- Select the **Training Category** from the **drop-down menu**.

Pathway Step Type

Training Provider

Learning Type

Nature of Learning

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Legislative First Category

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Hours

Automatic Certification

SADA Accreditation

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Training Category

Sub Category

Skills Priority

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.

- Select the **Skills Priority** from the **drop-down menu**.

Pathway Step Type

Training Provider

Learning Type

Nature of Learning

Training Classification

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

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Skills Priority

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.

- Configure the settings for the expiry of **learner records**.

Prerequisite

Source

B *I* U ~~X~~ X^2 \int $\frac{1}{x}$ $\frac{1}{x^2}$ $\frac{1}{x^3}$ $\frac{1}{x^4}$ $\frac{1}{x^5}$ $\frac{1}{x^6}$ $\frac{1}{x^7}$ $\frac{1}{x^8}$ $\frac{1}{x^9}$ $\frac{1}{x^{10}}$ $\frac{1}{x^{11}}$ $\frac{1}{x^{12}}$ $\frac{1}{x^{13}}$ $\frac{1}{x^{14}}$ $\frac{1}{x^{15}}$ $\frac{1}{x^{16}}$ $\frac{1}{x^{17}}$ $\frac{1}{x^{18}}$ $\frac{1}{x^{19}}$ $\frac{1}{x^{20}}$ $\frac{1}{x^{21}}$ $\frac{1}{x^{22}}$ $\frac{1}{x^{23}}$ $\frac{1}{x^{24}}$ $\frac{1}{x^{25}}$ $\frac{1}{x^{26}}$ $\frac{1}{x^{27}}$ $\frac{1}{x^{28}}$ $\frac{1}{x^{29}}$ $\frac{1}{x^{30}}$ $\frac{1}{x^{31}}$ $\frac{1}{x^{32}}$ $\frac{1}{x^{33}}$ $\frac{1}{x^{34}}$ $\frac{1}{x^{35}}$ $\frac{1}{x^{36}}$ $\frac{1}{x^{37}}$ $\frac{1}{x^{38}}$ $\frac{1}{x^{39}}$ $\frac{1}{x^{40}}$ $\frac{1}{x^{41}}$ $\frac{1}{x^{42}}$ $\frac{1}{x^{43}}$ $\frac{1}{x^{44}}$ $\frac{1}{x^{45}}$ $\frac{1}{x^{46}}$ $\frac{1}{x^{47}}$ $\frac{1}{x^{48}}$ $\frac{1}{x^{49}}$ $\frac{1}{x^{50}}$ $\frac{1}{x^{51}}$ $\frac{1}{x^{52}}$ $\frac{1}{x^{53}}$ $\frac{1}{x^{54}}$ $\frac{1}{x^{55}}$ $\frac{1}{x^{56}}$ $\frac{1}{x^{57}}$ $\frac{1}{x^{58}}$ $\frac{1}{x^{59}}$ $\frac{1}{x^{60}}$ $\frac{1}{x^{61}}$ $\frac{1}{x^{62}}$ $\frac{1}{x^{63}}$ $\frac{1}{x^{64}}$ $\frac{1}{x^{65}}$ $\frac{1}{x^{66}}$ $\frac{1}{x^{67}}$ $\frac{1}{x^{68}}$ $\frac{1}{x^{69}}$ $\frac{1}{x^{70}}$ $\frac{1}{x^{71}}$ $\frac{1}{x^{72}}$ $\frac{1}{x^{73}}$ $\frac{1}{x^{74}}$ $\frac{1}{x^{75}}$ $\frac{1}{x^{76}}$ $\frac{1}{x^{77}}$ $\frac{1}{x^{78}}$ $\frac{1}{x^{79}}$ $\frac{1}{x^{80}}$ $\frac{1}{x^{81}}$ $\frac{1}{x^{82}}$ $\frac{1}{x^{83}}$ $\frac{1}{x^{84}}$ $\frac{1}{x^{85}}$ $\frac{1}{x^{86}}$ $\frac{1}{x^{87}}$ $\frac{1}{x^{88}}$ $\frac{1}{x^{89}}$ $\frac{1}{x^{90}}$ $\frac{1}{x^{91}}$ $\frac{1}{x^{92}}$ $\frac{1}{x^{93}}$ $\frac{1}{x^{94}}$ $\frac{1}{x^{95}}$ $\frac{1}{x^{96}}$ $\frac{1}{x^{97}}$ $\frac{1}{x^{98}}$ $\frac{1}{x^{99}}$ $\frac{1}{x^{100}}$

Learner record expiry options

Please Note: The expiry details potentially have a system-wide impact and therefore it is crucial that the correct expiry information is captured. Some implications of an expired learner record is e.g. that a course is marked as outstanding on an employee's PDP or that a pathway is seen as not completed. The functionality exists to send expiry warning notifications.

A learner record created for this course **never expires**

Learner records for this course expire months after a learner has completed it.

months **before** the expiry date (called the advance warning period), the course will be re-opened and if a learner repeats the course again from the advance warning period onwards, he will receive a **new** learner record for this course. If the course is repeated before the advance warning period commences, the learner's existing learner record for this course is **updated** with the new results.

Expire all learner records **completed before** (All learner records with an **end date before (and including)** this specified date, will be displayed as expired.)

Printing of Certificates

When a Certificate template is selected, the administrator will always be able to print a Certificate via the Bulk Certificate Report.

When to print the Certificate

When they have been found competent

When they have completed the course

Who can print the Certificate?

Allow the learner to print the Certificate

Certificate Details

Certificate Template

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- Configure the settings for the printing of **certificates**.

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Allow the learner to print the Certificate

Certificate Details

Certificate Template

Certificate Display Name

Training Intervention Image (300px x 200px)

Badges

Show as Badge

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- If you employ a **gamification** strategy in your learning environment, you can display a completed course as a **badge** and assign **points** for **leaderboard** tracking.

Learner record expiry options

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When they have completed the course

Who can print the Certificate?

Allow the learner to print the Certificate

Certificate Details

Certificate Template

Certificate Display Name

Training Intervention Image (300px x 200px)

Badges

Show as Badge

- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another training intervention or click **BACK TO LIST** to discard your edits.

Learner record expiry options

Please Note: The expiry details potentially have a system-wide impact and therefore it is crucial that the correct expiry information is captured. Some implications of an expired learner record is e.g. that a course is marked as outstanding on an employee's PDP or that a pathway is seen as not completed. The functionality exists to send expiry warning notifications.

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When to print the Certificate

When they have been found competent

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Who can print the Certificate?

Allow the learner to print the Certificate

Certificate Details

Certificate Template

Certificate Display Name

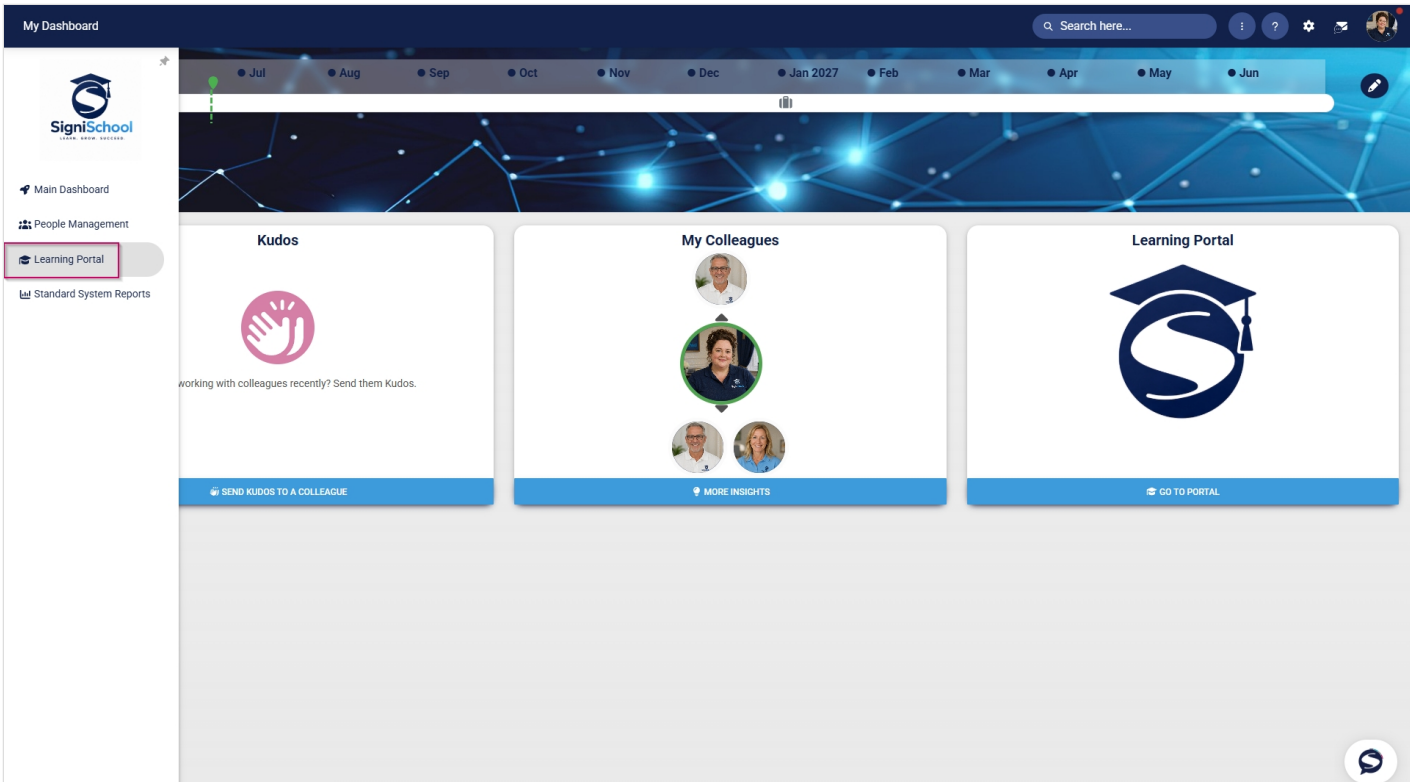
Training Intervention Image (300px x 200px)

Badges

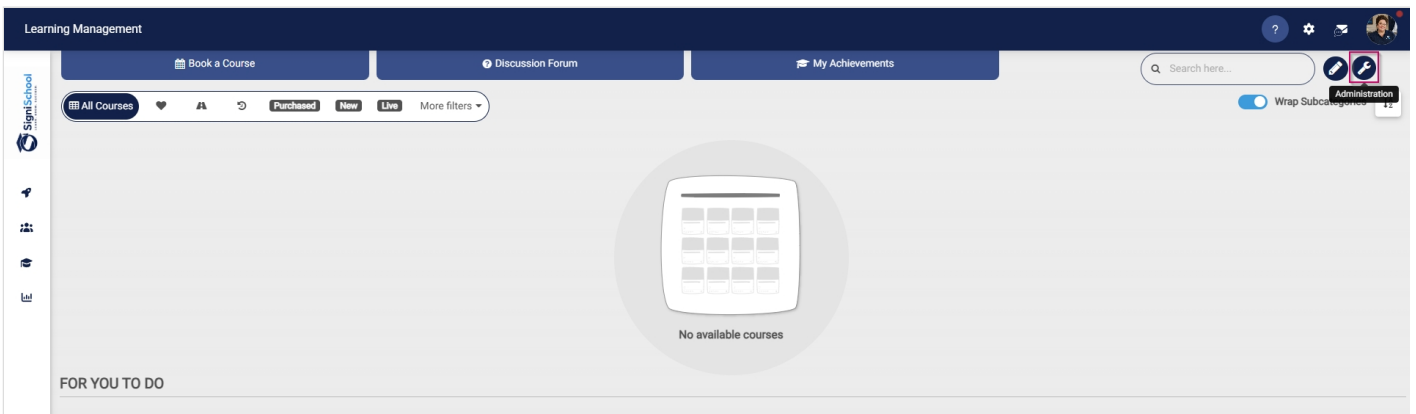
Show as Badge

Method 2: Add training interventions using the import

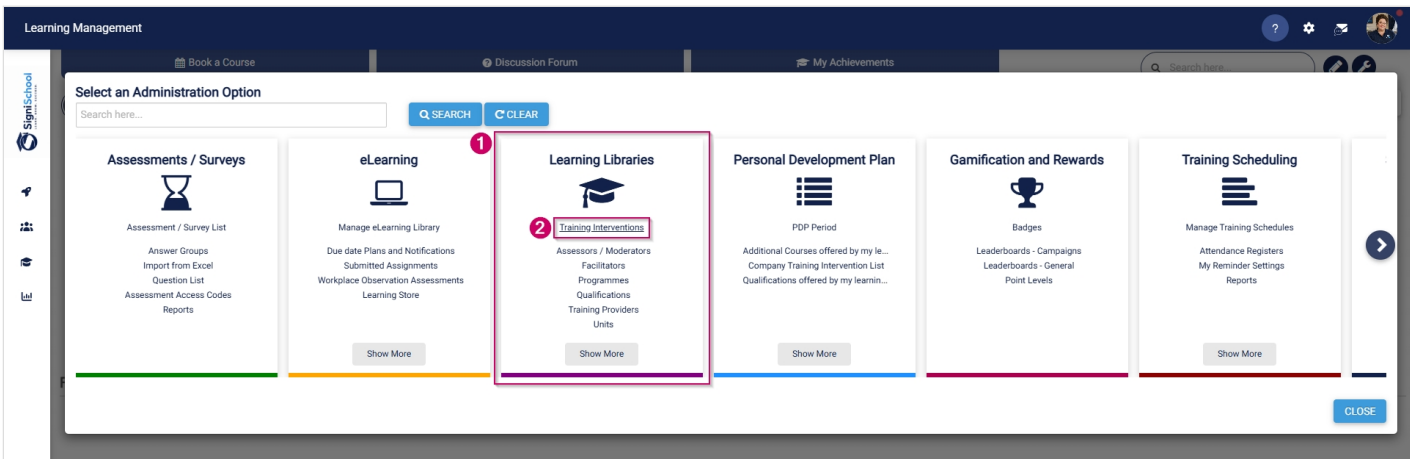
- Hover over the **sidebar** menu, then click **Learning Portal**.



- Click the **spanner icon** to access the system's **Administration** menu.



- On the **Learning Libraries** card, click **Training Interventions**.



- The **Training Intervention Library** will open. This is where training interventions can be created, edited, or deleted. Click **IMPORT TRAINING INTERVENTIONS** to begin.

Training Intervention List

Search

Description Type

SETA Name SETA Period

SETA Is PIVOTAL

Show Disabled Training Intervention

SEARCH CLEAR

ADD DELETE **IMPORT TRAINING INTERVENTIONS** IMPORT ATR DETAILS COPY ATR DETAILS

Previous 20 | Next 20

No results found for your current search criteria

Previous 20 | Next 20

ADD DELETE

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- Click on the **Technical Information** section.
 - Take note of the maximum field lengths for each category.
- Copy the data in the section titled **First row should look like**.
 - Use this data to construct a training intervention import file.
 - For more information and a step-by-step guide on how to do this, go to the next section: [Create a custom Training Intervention file in Excel](#).
- Once you have populated your training intervention document, click **CHOOSE FILE** to upload your import file as a .csv, .xls, or .xlsx.
- Click **SAVE & PREVIEW**.

IMPORT FILE

The Import File page provides a summary of the configuration for the selected import process. The user can upload a .csv, .xls or .xlsx file and directly import the selected file using the existing configuration provided that the file is the same as the configuration.

Technical Information

Name	Custom Import Training Interventions
Description	Custom Import Training Interventions
Delimiter	Comma (,)
Text Qualifier	
Does first row contain headers?	Yes
Comments	Maximum Field lengths (in number of characters): Code = 20, Training_Intervention_Name = 500, Training_Provider_Code = 20, Training_Provider = 400, Mandatory Fields: Training_Intervention_Name, Learning_Type, Nature_of_Learning, Training_Classification, NQF_Level, NQF_Band, Credits, Hours, Learner_can_print_own_certificate_when_competent, Certificate_Display_Name
First row should look like	System_Reference.Code, Training_Intervention_Name, Description, Type, Training_Provider_Code, Training_Provider, Learning_Type, Nature_of_Learning, Training_Classification, NQF_Level, NQF_Band, Credits, Hours, Learner_can_print_own_certificate_when_competent, Certificate_Display_Name

Show import example

Select file to import NO FILE CHOSEN

- Review the preview of your data import. If the data appears correct, tick the **checkbox** to confirm it.
- You are now ready to kick off the import.
 - You can execute a **mock import** to ensure all the data displays correctly. This is recommended for very large import files. To do this, click **EXECUTE MOCK IMPORT**.
 - If the data is ready to be imported, click **EXECUTE IMPORT**.

IMPORT FILE

The Import File page provides a summary of the configuration for the selected import process. The user can upload a .csv, .xls or .xlsx file and directly import the selected file using the existing configuration provided that the file is the same as the configuration.

Technical Information

Select file to import NO FILE CHOSEN

Hide import file

ID	SYSTEM_REFERENCE	CODE	TRAINING_INTERVENTION_NAME	DESCRIPTION	TYPE	TRAINING_PROVIDER_CODE	TRAINING_PROVIDER	LEARNING_TYPE	NATURE_OF_LEARNING	TRAINING_CLASSIFICATION	NQF_LEVEL	NQF_BAND	CREDITS	HOURS	LEARNER_CAN
1			Course 1 - Acceptance		Acceptance			eLearning	Internal	Local Training					Yes
2			Course 1 - Assessment		Assessment			eLearning	Internal	Local Training					Yes
3			Course 1 - Assignment		Assignment			eLearning	Internal	Local Training					Yes
4			Course 1 - Certificate		Certification Point			eLearning	Internal	Local Training					Yes
5			Course 1 - Scorm Content		Scorm Content			eLearning	Internal	Local Training					Yes

I verify that the preview of the above data is correct

- Your **Training Intervention Library** is now populated with your new training interventions. If you do not see your training interventions, please refresh your browser window.



Search

Description Type

SETA Name SETA Period

SETA is PIVOTAL
 Show Disabled Training Intervention

Previous 20 | Next 20

Code	Training Intervention Name	Type	Learning Type	Nature of Learning	Category	Is PIVOTAL Training	Delete
	Course 1 - Acceptance	Acceptance	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 1 - Assessment	Assessment	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 1 - Assignment	Assignment	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 1 - Certificate	Certification Point	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 1 - Scorm Content	Scorm Content	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 2 - Acceptance	Acceptance	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 2 - Assessment	Assessment	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 2 - Assignment	Assignment	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 2 - Certificate	Certification Point	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>
	Course 2 - Scorm Content	Scorm Content	eLearning	Internal	G - Informal Training (Workplace)		<input type="checkbox"/>

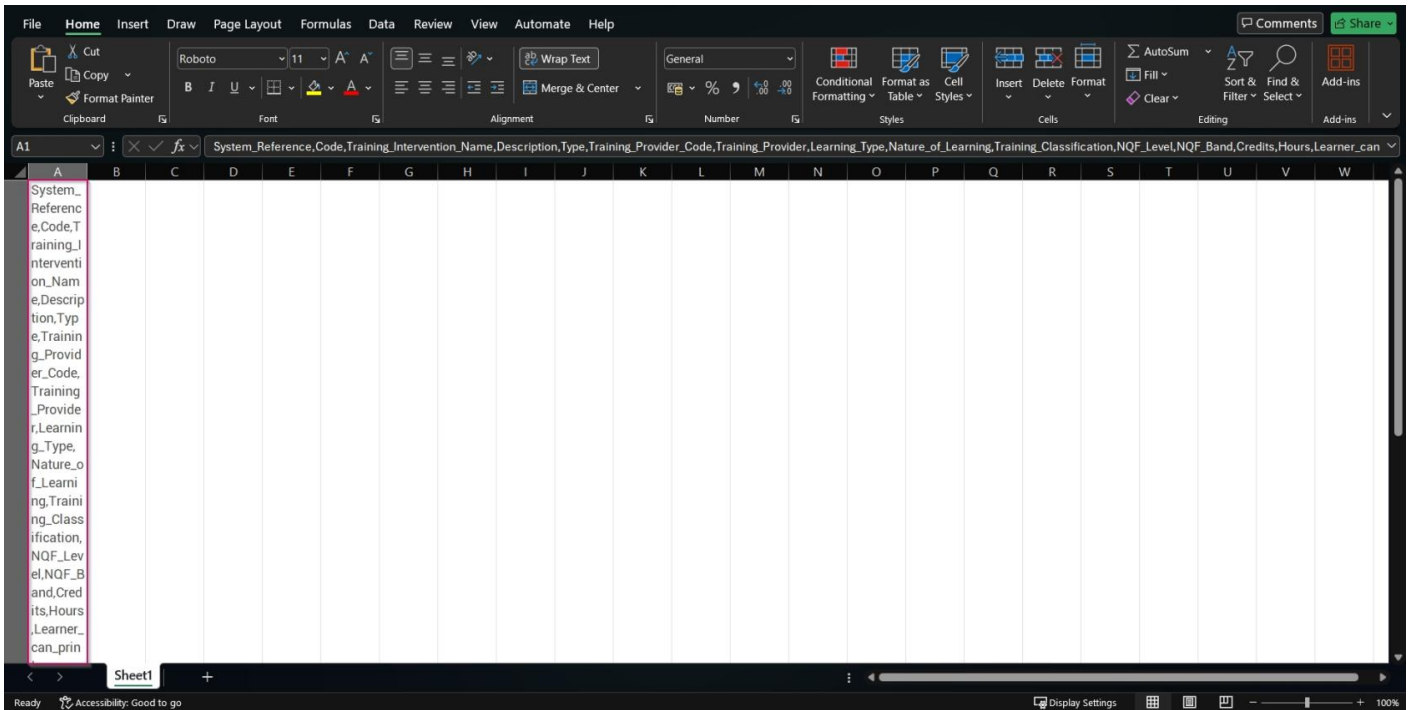
Previous 20 | Next 20

Create a custom Training Intervention file in Excel

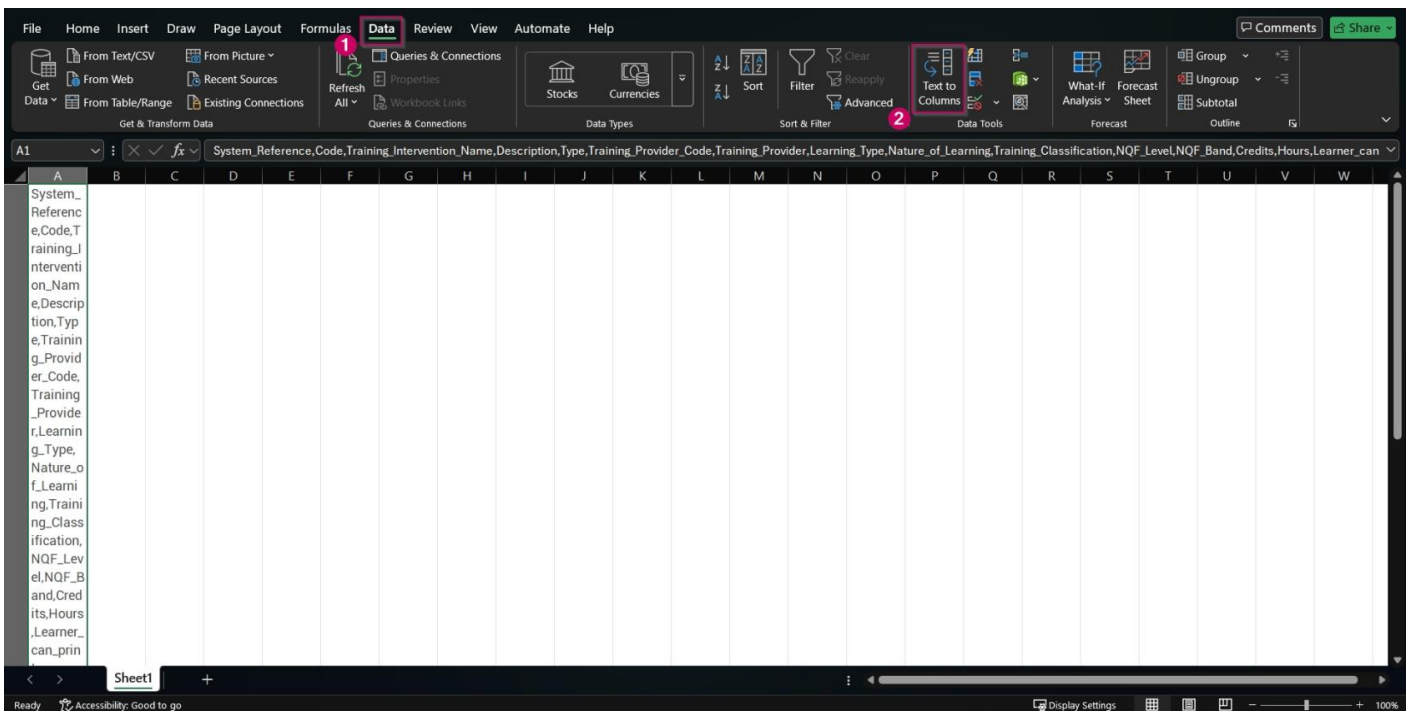
- Copy the following information to your clipboard:

```
System_Reference,Code,Training_Intervention_Name,Description,Type,Training_Provider_Code,Training_Provider,Learning_Type,Nature_of_Learning,Training_Classification,NQF_Level,NQF_Band,Credits,Hours,Learner_can_print_own_certificate_when_competent,Certificate_Display_Name,Training_Scheduling_Category,Participants_Min,Participants_Max,Outcomes,Skills_Priority,Prerequisite,Training_Category,Log_to_Learner_Record,Learner_Record_Never_Expires,Advanced_Warning_Period,Expire_All_Learner_Records_Completed_Before,Learner_Records_Expiry,Exclude_From_Reports,WSP_ATR_Category,PTP_PTR_Category,Documentation_Required,AllowViewingTranscripts,IsPivotalTraining,IsMandatory,Mobile_Application_Template,Automatic_Certification,SAQA_Accredited,Update_Mentor_Manually,ImageUrl,BadgeUrl,ShowBadgeWhen,MinPoints,MaxPoints,MinScore,MaxScore,BadgeExpiryMonths,BadgeShowScoreDistributionGraph,BadgeShowLeaderboard
```

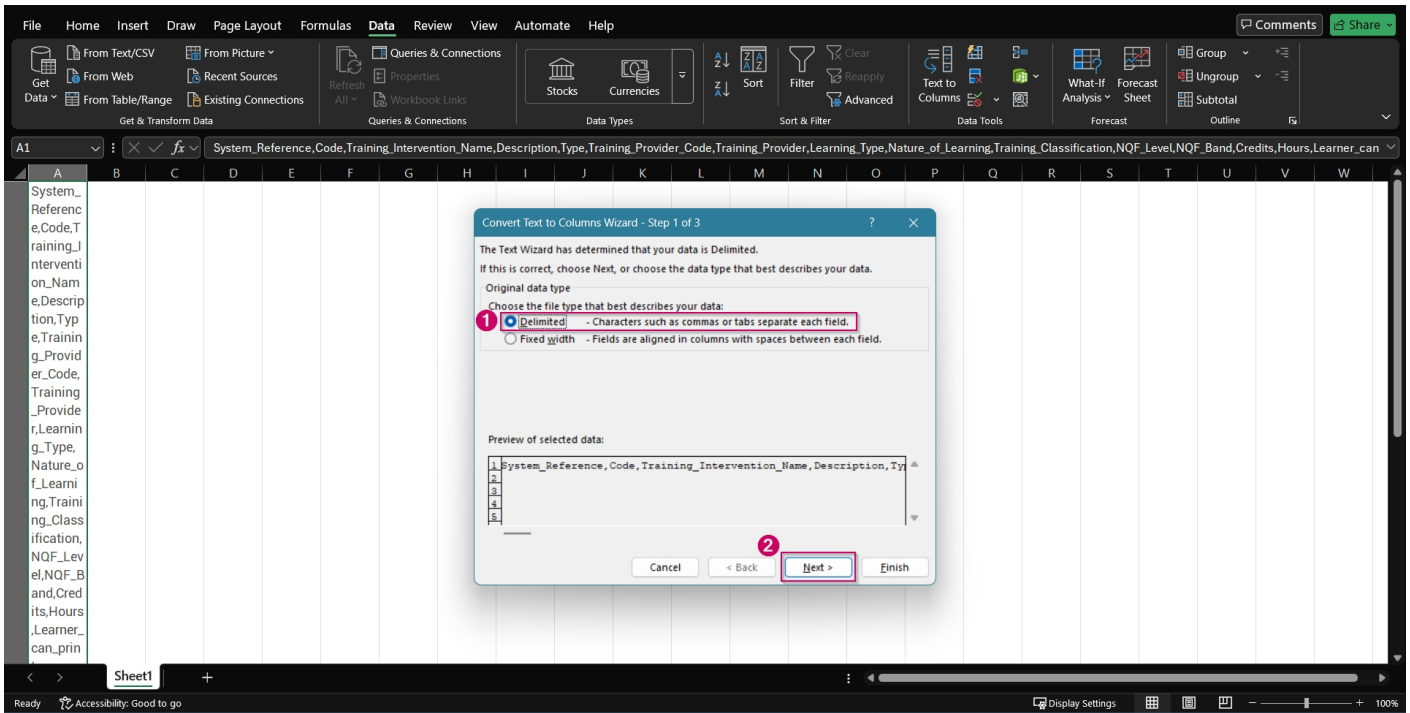
- Open the **Excel** application and create a new **workbook**.
- Paste the information into the first cell of the new workbook.



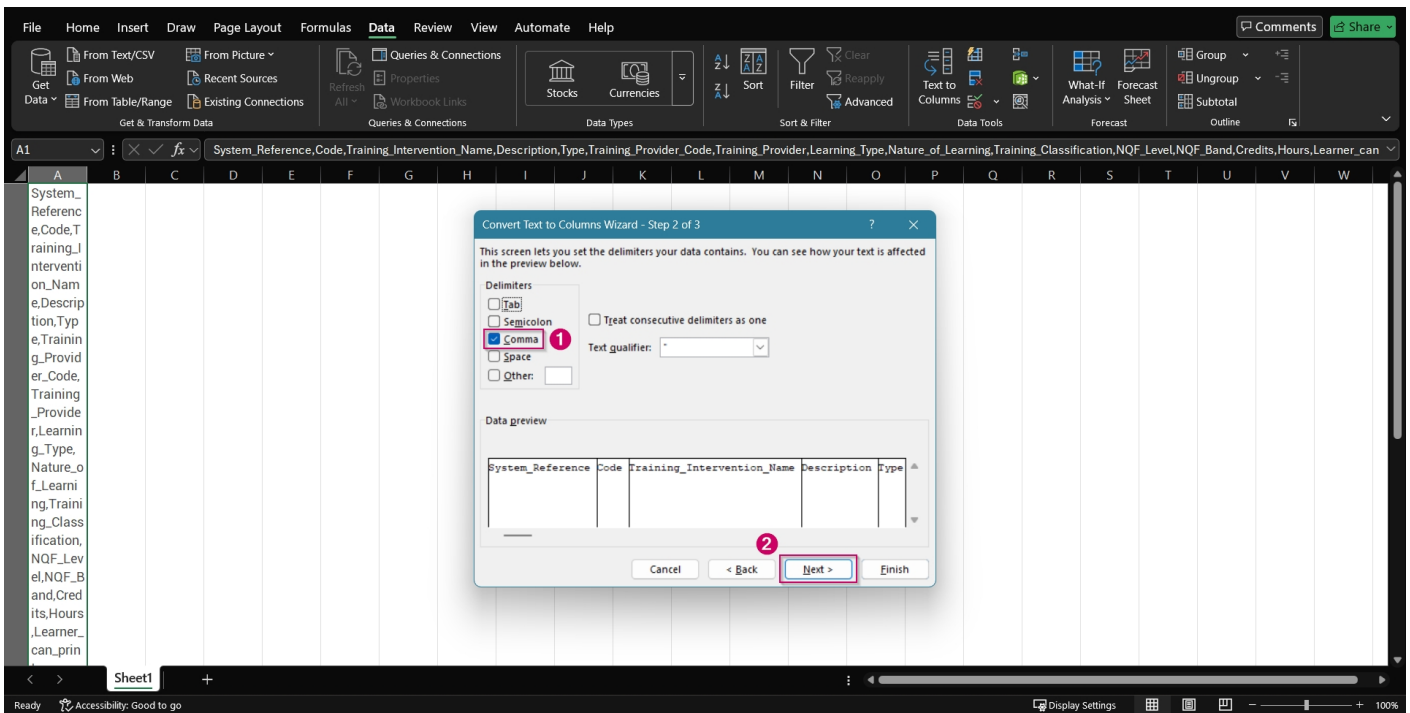
- Ensuring the first cell is selected, navigate to the **Data** tab. Click the **Text to Columns** option in the **Data Tools** section.



- The **Convert Text to Columns Wizard** will pop up. Click the **Delimited** radio button, then click **Next**.



- In the **Delimiters** section, ensure **ONLY** the **Comma checkbox** is ticked, then click **Next**



- Click **Finish**.

Revision #6

Created 2025-02-03 15:19:39 UTC by Chanan Stenden

Updated 2026-06-22 12:16:30 UTC by Chanan Stenden