

Training Webinar Spring 2003

Vocabulary:

Training Subject: Big picture; Good for one or more courses.

Training Course: Specific instance (date/time/experience) that fulfills a Subject; Could be 1:1, could be multiples to one.

Examples:

Training Subject	Training Course
Orientation (makes a Certification for Orientation)	General Orientation (specific date). Teen Orientation (specific date)
Customer Service I (makes a Certification for Service training)	Customer Service
Service training (makes a Certification for Service training)	How to resolve conflict, Resolving customer questions

Training subjects :

Training subject

Description:

CPR & Rescue Breathing

Ownership tags:

Hospital A,Hospital B

Other languages

☐ Inactive

Expiration:

03/09/2025

☒ Use a specific or relative date for expiration

☒ Link trainings for this subject to a certification

Certification:

CPR Certification

Method

Always create new

Certification expiration:

03/09/2025

☐ Credit students with hours

Comments

Image album

Include by image tags:

(none)

Include by image types:

(none)

The subject set-up sets the rules for making a training. In this case:

- A relative date is used to set up an expiration for the training
- When a training is made, it also makes a new certification expiring in 2 years
- (not checked) Credit the volunteer with a fixed number of hours for the training.

Two types of trainings - those you offer and ones that volunteers complete outside your organization.

Example 1: Trainings you provide:

You have a series of ongoing in-person Orientations. As volunteers confirm you want to add them to the course. At the time of the class you need a sign-in sheet, and you want to manually credit who attended.

Step 1: Create the training

From **User tools** -> **Training courses** -> **+ Add a new course**

The required elements are at the top (in yellow). You'll notice they are very similar to what you would use to build a job slot.

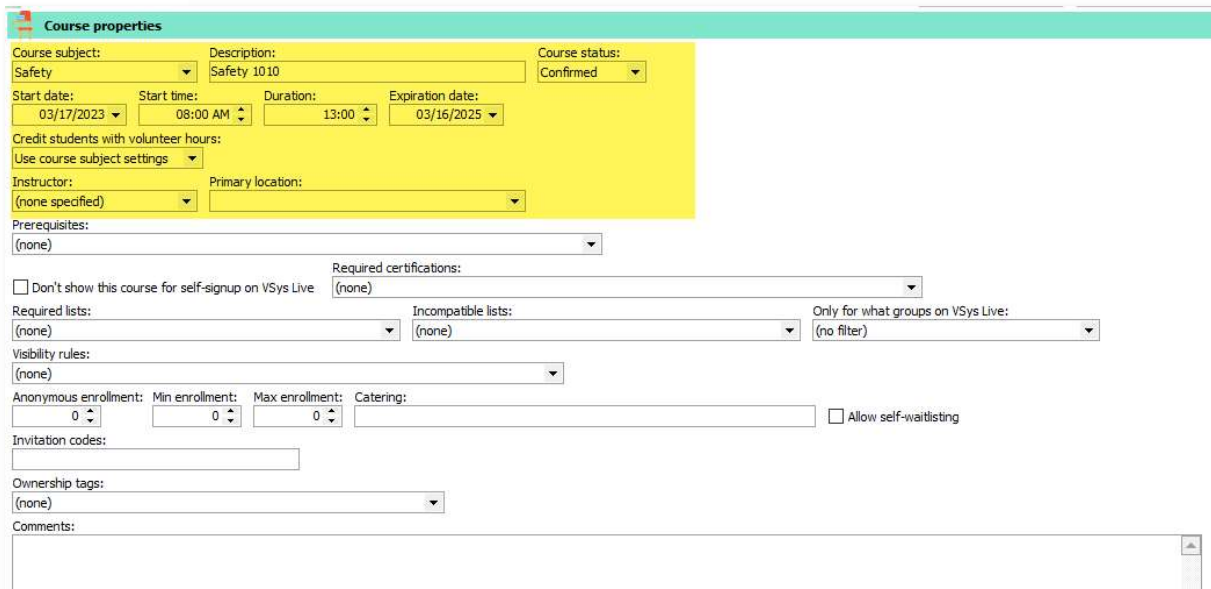
Subject/Description: may be the same or different

Course status: Usually start with confirmed, and Complete when finished

Start date, Start time, Duration: What/When

Credit students with volunteer hours: Automatically credit hours when complete. Can be different from subject.

Instructor/Primary location: Who/Where



Course properties

Course subject: Safety Description: Safety 1010 Course status: Confirmed

Start date: 03/17/2023 Start time: 08:00 AM Duration: 13:00 Expiration date: 03/16/2025

Credit students with volunteer hours: Use course subject settings

Instructor: (none specified) Primary location: (none)

Prerequisites: (none)

Required certifications: (none)

☐ Don't show this course for self-signup on V Sys Live

Required lists: (none) Incompatible lists: (none) Only for what groups on V Sys Live: (no filter)

Visibility rules: (none)

Anonymous enrollment: 0 Min enrollment: 0 Max enrollment: 0 Catering: ☐ Allow self-waitlisting

Invitation codes: (none)

Ownership tags: (none)

Comments: (none)

Optional:

Restrictions: **Prerequisites/Requirements/Visibility rules/Capacity**

V Sys Live only:

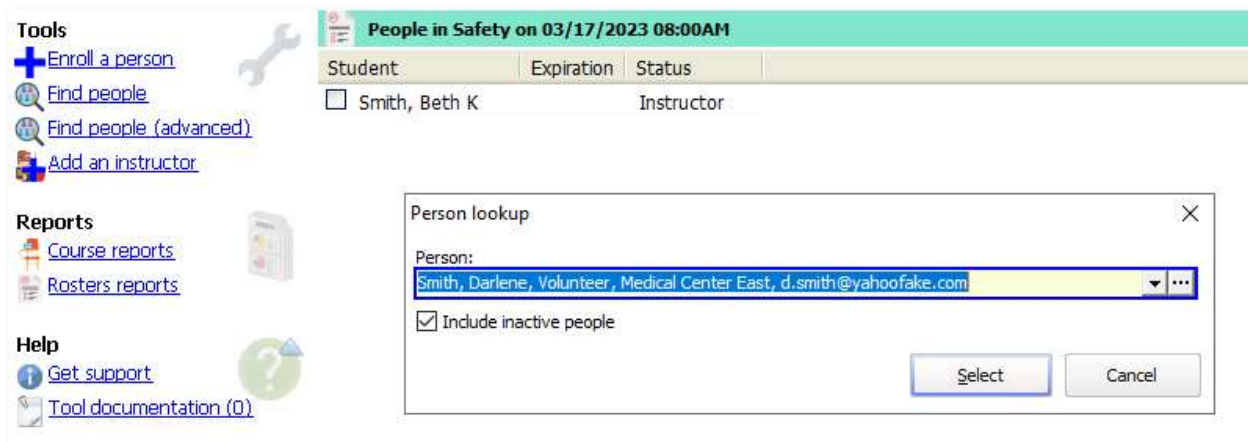
Show on V Sys Live: allows for volunteer self-signup in Live if they meet the requirements.

Visibility rules: rules for allowing volunteer self-signup in Live beyond what is in requirements.

NOTE: You must **Save** before adding people. (**Save and stay here** lets you continue)

Step 2: Adding a person to a training

Click on the **Training Course** and go to **See Course Registrants** at the bottom. Then use the values on the top left to add people.

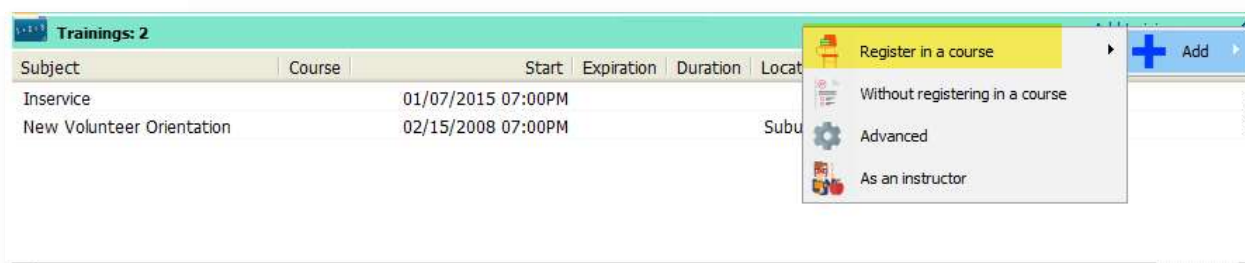


Enroll a person - one person, look up by last/family name

Find people - one person, more look-up options

Find people (advanced) - use filters, ie. find everyone in a job association and pick from that list.

Or from within a person's record: **Add training** -> **Register in a course** -> **Select training**.



Step 3: Roster Reports

Roster reports are available from the training course screen or from **Find a report**. (Running them from the training will pre-set the filters for you.)

Training class roster

Safety Start time: 08:00 AM Duration: 13:00 03/17/2023
 Region A Enrollment: 7 Instructor: Smith, Beth K

Byrd, Shirley D

E-mail: _____

Gresham, Kerry T

E-mail: _____

Harden, Jerome M

E-mail: _____

Step 4: Crediting a training

After the course, use your checkboxes and right-click menu to select your attendees and change their status.

People in Safety on 03/17/2023 08:00AM		
Student	Expiration	Status
<input checked="" type="checkbox"/> Lindenberg, John E	03/16/2025	Complete
<input type="checkbox"/> Telles, Beverly N	03/16/2025	Cancelled by volunteer
<input checked="" type="checkbox"/> Tackett, Kathryn R	03/16/2025	Complete
<input checked="" type="checkbox"/> Hysell, Alex M	03/16/2025	Complete
<input checked="" type="checkbox"/> Harden, Jerome M	03/16/2025	Complete
<input checked="" type="checkbox"/> Gresham, Kerry T	03/16/2025	Complete
<input checked="" type="checkbox"/> Byrd, Shirley D	03/16/2025	Complete
<input type="checkbox"/> Trinh, Dorene A		Did not show
<input checked="" type="checkbox"/> Smith, Darlene	03/16/2025	Complete
<input type="checkbox"/> Smith, Beth K		Instructor

Step 5: Completing a training (optional)

Sometimes it's helpful to know what you are done with. If so, **Edit course properties** and change the **Course status** to **Complete**.

Tip: Alternate method: Volunteers can sign in and out for trainings on the VSystem Live Kiosk. Please reach out to support if that is of interest.

Not covered: Self-sign up on VSystem Live

Example 2: Training from an external source

Volunteers are bringing completion certificates for a class taken in your HR system.

From the volunteer's profile, and at the Training section, **Add training** -> **Without registering in a course**



Filters and reports:

The **Training** filter will allow searching based on any elements of the training for both volunteers and instructors.

Bulk Trainings Creator:

If you already have your volunteers in a list or otherwise identified, the **Bulk Training Creator** will allow you to put the same training information in the profiles of those volunteers.

Advantage: If you already have them identified it may be faster.

Disadvantage: No way to track who cancelled or was a no-show, and no reporting options to track staff hours as instructors.

