Training Webinar
Spring 2003

Vocabulary:

<u>Training Subject:</u> Big picture; Good for one or more courses.

<u>Training Course:</u> 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 :

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.
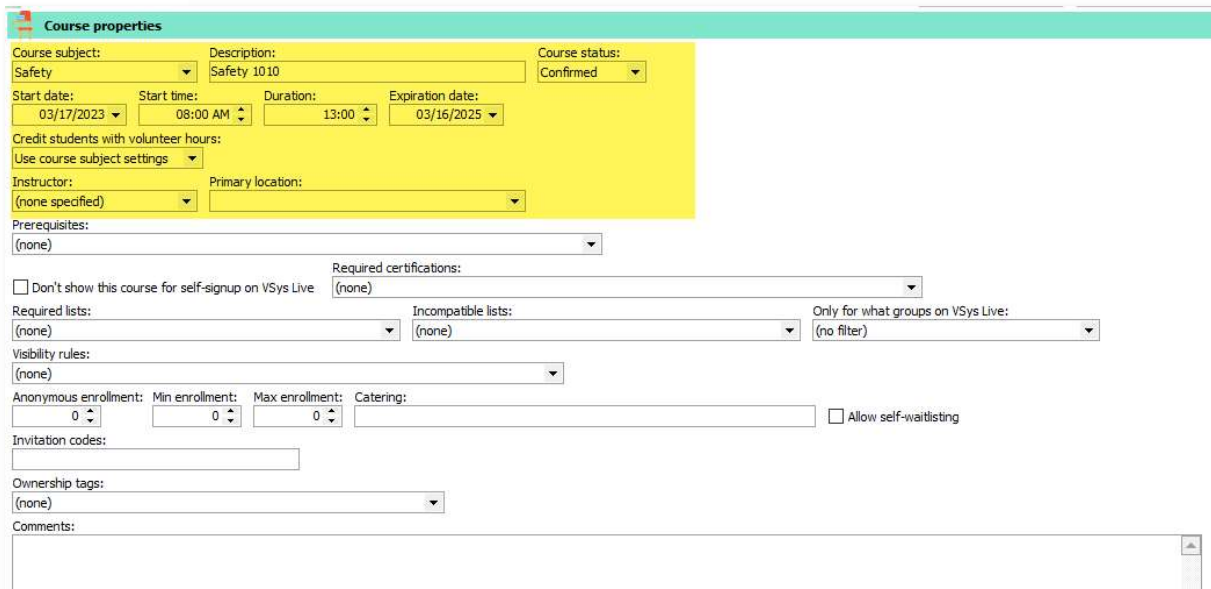
> **Subject/Description:** may be the same or different
> **Course status:** Usually start with confirmed, and Complete when finished
> **Start date, Start time, Duration:** What/When
> **Credit students with volunteer hours**: Automatically credit hours when complete. Can be different from subject.
> **Instructor/Primary location:** Who/Where

Optional:
Restrictions: **Prerequisites/Requirements/Visibility rules/Capacity**
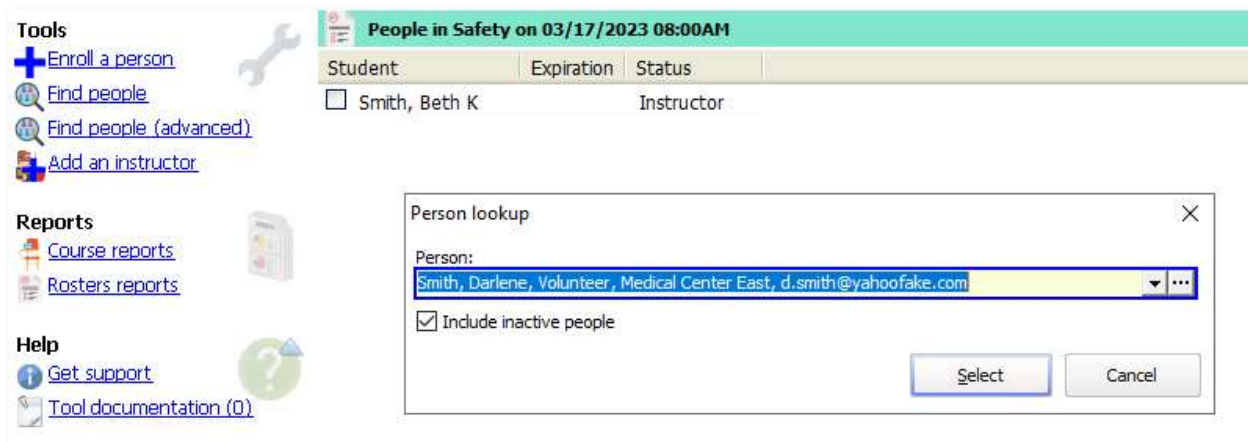
VSys Live only:
Show on VSys Live: allows for volunteer self-signup in Live if they meet the requirements.
Visibility rules: rules for allowing volunteer self-signup in Live beyond what is in requirements.

*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.
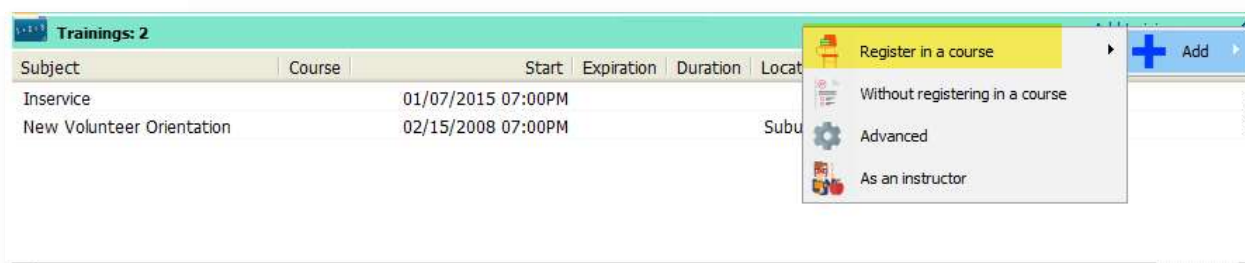

Enroll a person - one person, look up by last/family name
Find people - one person, more look-up options
Find people (advanced) - use filters, ie. find everyone in a job association and pick from that list.

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   Instructor: Smith, Beth K
                     Enrollment: 7

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.

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 VSys Live Kiosk. Please reach out to support if that is of interest.

Not covered: Self-sign up on VSys 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.