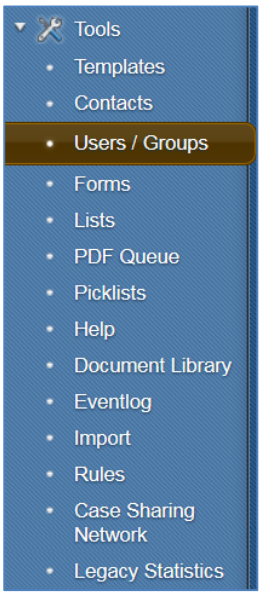
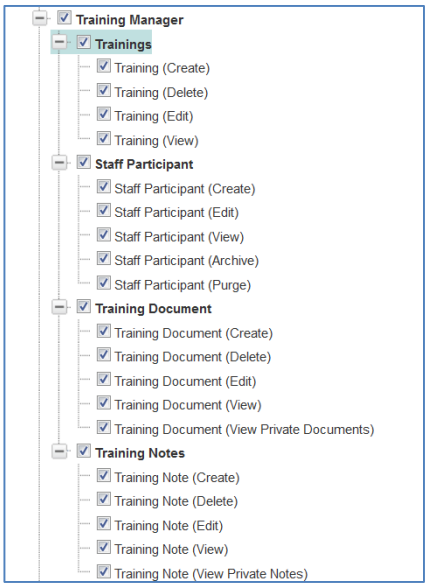
Training Manager Module Setup

This document will outline how to setup, configure, and customize the Training Module so that users can begin processing creating and tracking your trainings.

User Rights

There are many user rights associated with Training Manager Module. These allow you to view, create, edit, and delete trainings, as well as add and remove participants. The new rights can be found via the left navigation menu, under Tools>Users/Groups. If you edit a Group or the Account tab for an individual user, go to the User Rights section and look for "Training Manager" in the user rights tree:





For a complete list of the Training user rights and their definitions, see the document "*Title IX User Rights*." You should review these user rights and apply them to User Groups or individual staff prior to full implementation of the Training Module.

Training Forms

In order to begin using the Training Module, you should review the forms in the system to make sure that you are capturing the training data you need. The majority of training related data is entered via the Training form.

We have added fields to these forms by default, so that you can capture data that is useful regarding trainings you create. You do have the ability however to create new custom fields based on your campus needs. There are four specific Training related forms in system:

1. Training Form
2. Training – List Filter Form
3. Staff Participant Form
4. Staff Participant – List Filter Form

To edit training forms, go to the left navigation menu, and select Tools> Forms. In the "Label" field at the top, type "training" or "participant" to filter the forms list and see the associated forms. For instructions on using the Forms editor tool, see the document called "*Advocate – Form Builder*."

Picklists

Picklists are a tool that allow users entering data to literally pick from a predetermined list of values. When a field is created on a form and determined to be a Picklist (Widget = Picklist) and the form is saved, the field will show in the list of picklists under Tools>Picklists on the left navigation menu. Select the correct picklist by clicking on its underlined title.

NOTE: The name of the picklist will correspond to field name on the form and the "Forms" tool.

Items 1-20 of 45 Showing 20 Jump 1 | Next >

Display Name	Description	Hierarchical	Pick Count
Addresss: Country	List of Country values	No	239
Addresss: State	List of State values	No	53
Administrative Action: Aggravations	List of aggravation values	Yes	2
Administrative Action: Appeal Category	List of Appeal Category values	No	3
Administrative Action: Charges	List of Charges values	Yes	9

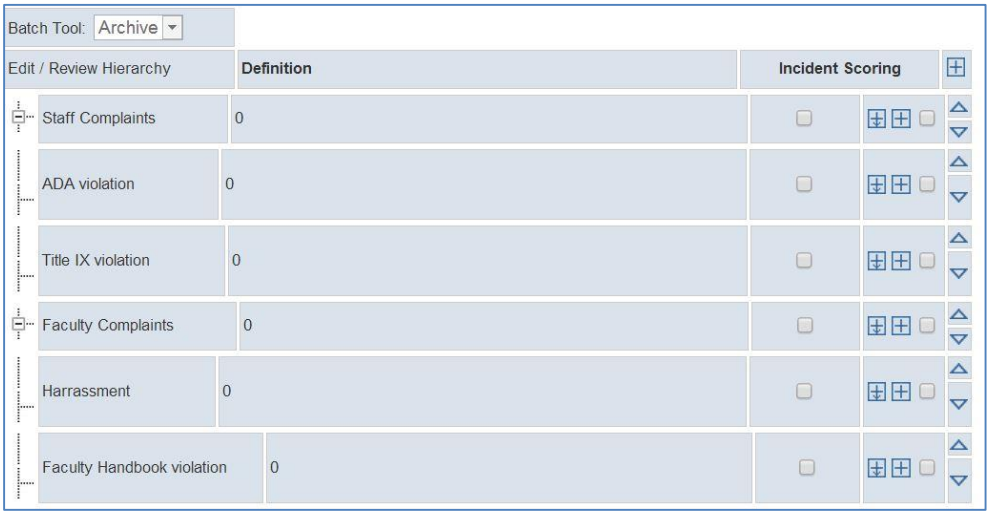
Utilize the icons to add items to the picklist:

a. Click the at the top of the list on the right side to begin your picklist. *NOTE:*

If you fail to save your work between items, your newly created items will be blank. It is recommended that you first create the desired number of extra items and then type your values into the picklist item, then save your work.

b. Within the picklist, select the (left hand icon) to add a new item directly below the row from which you have made your selection.

c. For Hierarchical Picklists: If you would like to create a sub item, click on the (middle icon) in the row that will contain the sub item.



4. To make changes to already-saved picklist items, simply click on the text you want to modify.

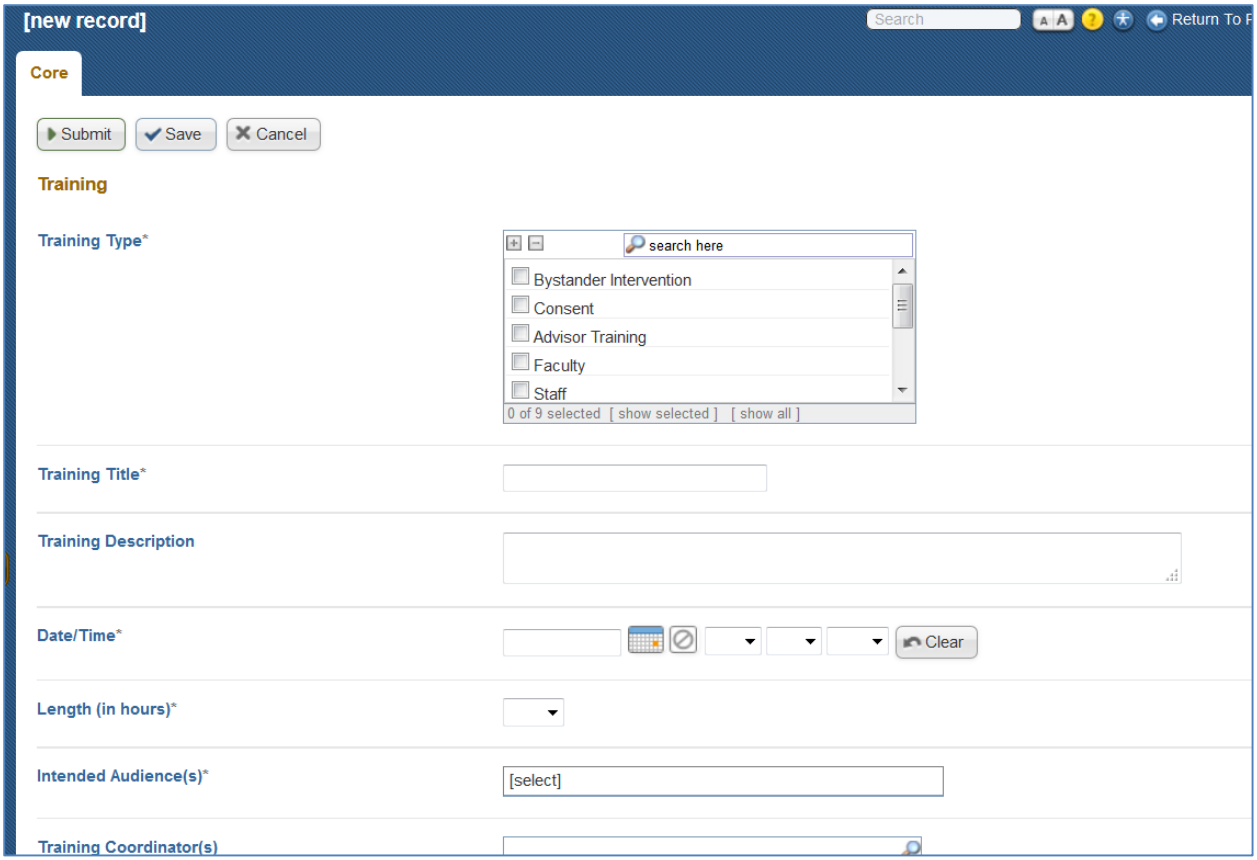
5. When finished, click **Save** to save changes and remain on this page, or click **Submit** to save changes and go back to the list of Picklists. These forms are edited like any other form in the system.
6. Advocate has a few default picklists related to Training Manager already in the system, and most of them have some default picklist values that might be of use (though those values can be modified). Please make sure to review each of these to determine which are necessary for your institution. The default picklists are:
    a. Training: Intended Audience
    b. Training: Length
    c. Training: Training Type

Creating a Training

1. Go to the left navigation menu and then Training Manager>Trainings. Click the "Add New Training" button.
2. You will be brought to the Training form which will allow you to create and customize your training. Some fields may be required and will be marked with an asterisk (*). Fields where data can be entered are displayed in the background color, while sections are displayed in the link color.
3. Use the dropdown menus to indicate the Training Type, Intended Audience(s), and length of the training. *The values for these dropdowns are contained in Tools>Picklists (see above for further details).
4. Set a date by clicking on the calendar icon and using the respective dropdown menus for the month and year along the top of the calendar. Click on the date number to choose the particular day. Set the time of the incident by utilizing

the Time dropdown menus. The order of Time dropdown menus are HH MM AM/PM. Use the "Clear" button to reset the Date/Time fields.

5. The "Location" field is populated by the list of buildings/areas on your campus.
6. When you are finished filling in the required and optional data, click the "Save" button to save and remain viewing the new training or "Submit" to save and return to the list of trainings.

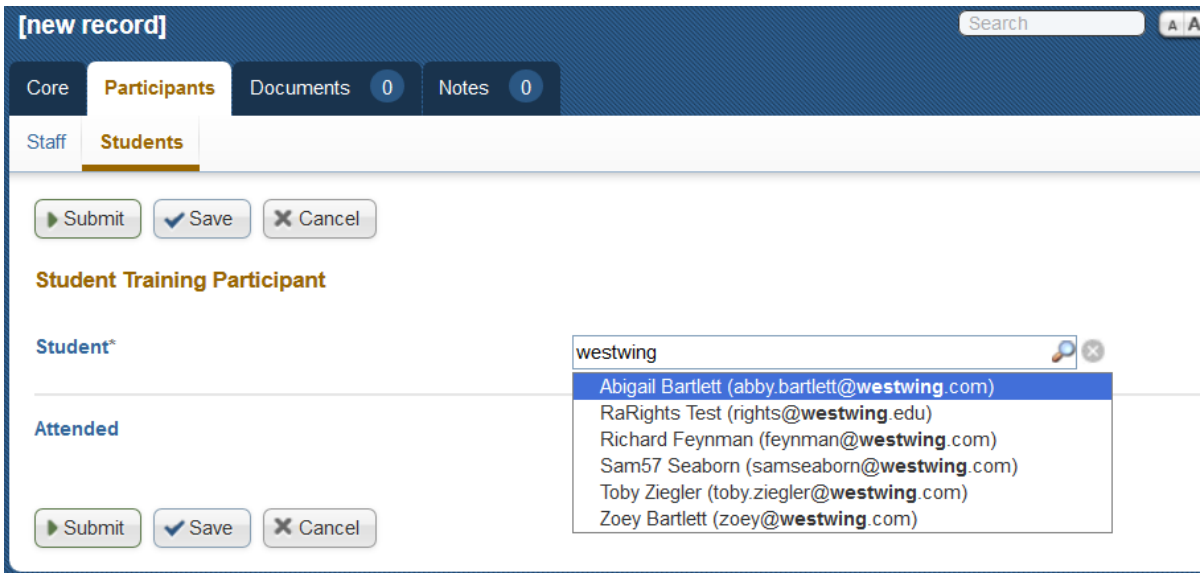


7. Once you have saved the new training, you will see the "Participants" tab appear, as well as the "Documents" and "Notes" tabs, depending on your user rights.
8. You will also see basic information about the training itself on the right side of the screen, including when it was created and last modified.

Adding Training Participants - Students

There are **three** ways that students can be added to a training: individually via the Training itself; via batch tools from the student list; or via import.

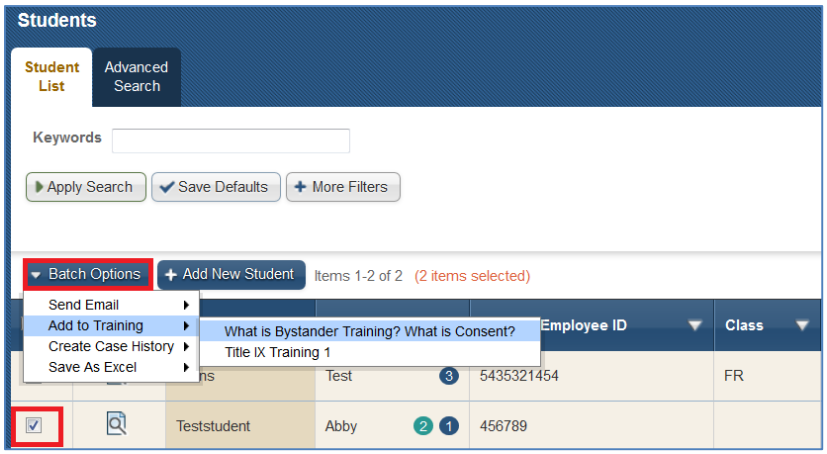
1. To add a participant ***individually***, click on the "Participants" tab and then click



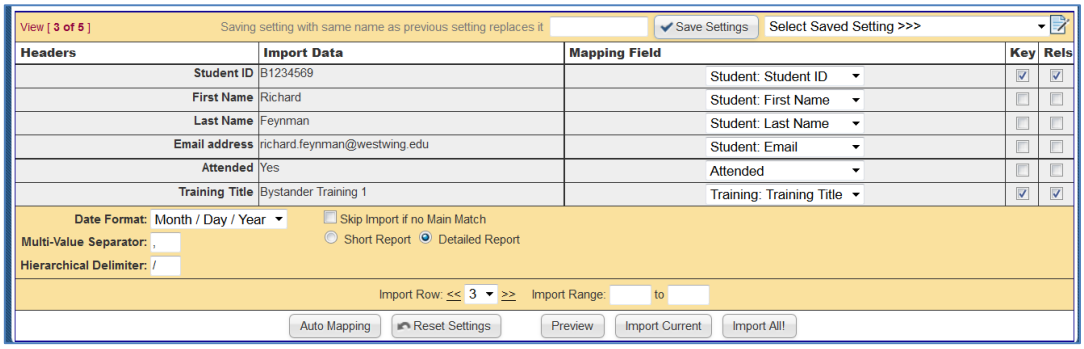
on the "Add New Participant" button in the "Students" section.

2. Type the participant name in the "Student" search box. Advocate will search the Student list from within Advocate and give you a list of possible matches. Select the one you want by clicking on the name.
3. Click "Save" or "Submit" to finish adding the participant.
4. To add participants via the ***batch tools***, you can go to the main Student or Employees list via the left navigation menu.

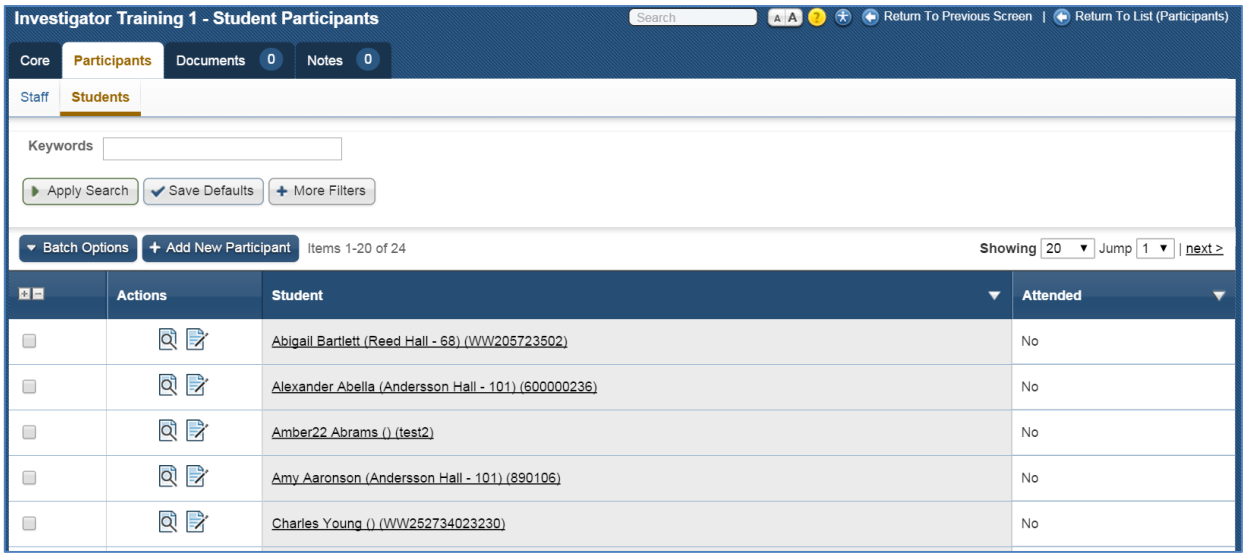
5. Filter the Student list to find those that you want to add. Click the box on the far left column next to the person's name to select.
6. Click on the "Batch Options" button, scroll to "Add to Training" and select your training.
7. Click "OK" to confirm and the system will add the selected students to the training.



8. To add participants ***via import***, go to Tools>Imports. Choose "Student Participants" as the "Import Object" and fill in the required fields. Then click "upload" to process your import file.
9. Go to the mapping screen where you can match the Import Data with the Mapping fields. You will map to basic student data fields like name, email and ID, the Training name, and Attended Y/N.
10. Make sure to "Key" and "Rels" on the participant's unique identifier (like Student ID or email) address, and "Key" and "Rels" on Training title. Click "Import All!" to complete the import.



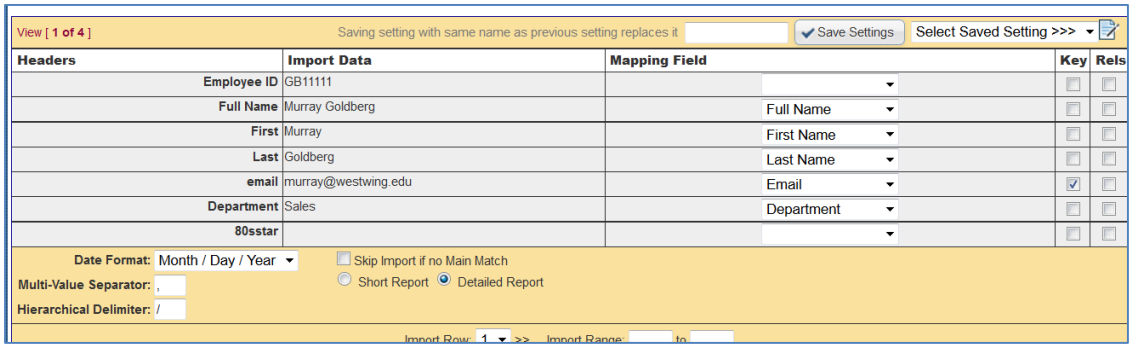
11. Those participants added will show now in the Participants tab on the training.



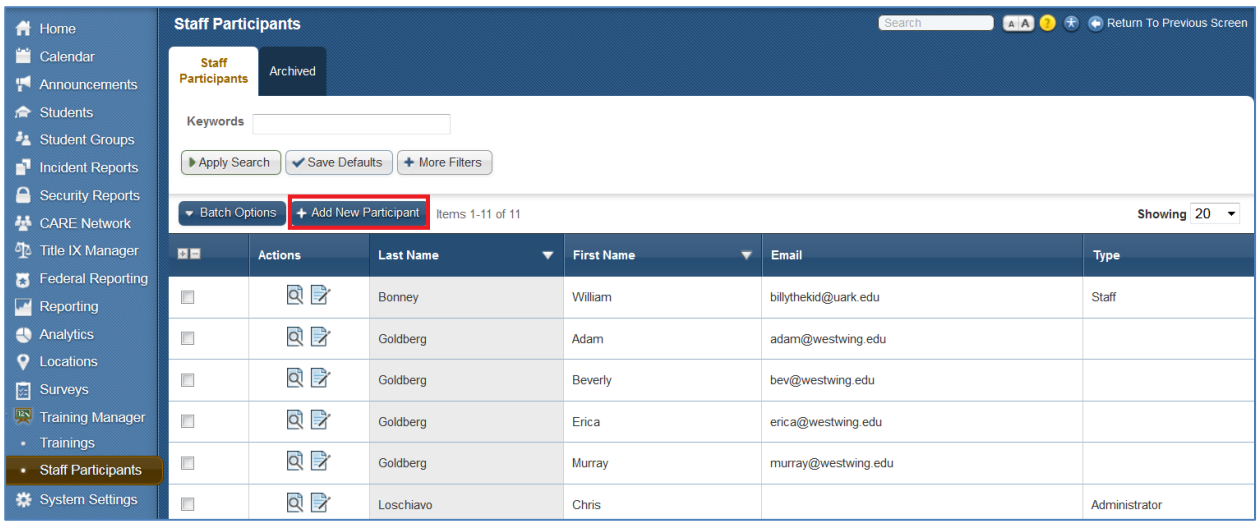
Adding Training Participants – Staff

Unlike student participants, staff participants in Advocate are not linked to your normal lookup process. Thus, they cannot be added individually to a training via the search process mentioned above, but are added instead via batch tools and the importing process.

1. To add Staff into Advocate that can be then added to Trainings, go to Tools>Imports on the left navigation menu. Choose "Staff Participants" as the "Import Object" and fill in the required fields. Then click "upload" to process your import file.
2. Go to the mapping screen where you can match the Import Data with the Mapping fields from the Staff Participant form.
3. Make sure to "Key" on the participant's email address, which will allow you to create a new/unique staff participant record. Click "Import All!" to complete the import.



4. Once the staff participants have been imported, they will show in Training Manager>Staff Participants on the left navigation menu.
5. *Note that you can also add a new staff participant directly to the Staff Participants list via the "Add New Participant" button in Training Manager>Staff Participants.

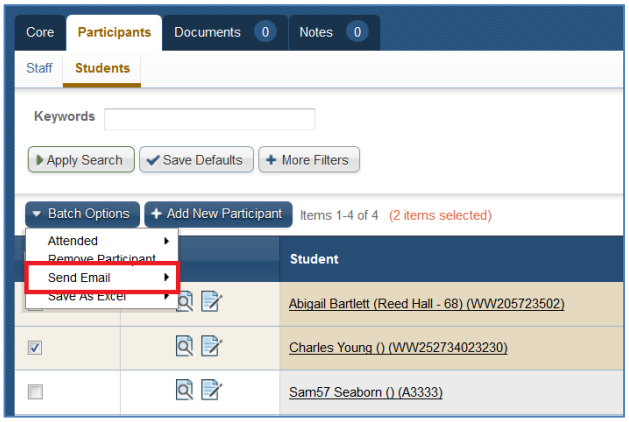


System Messages and User Messages

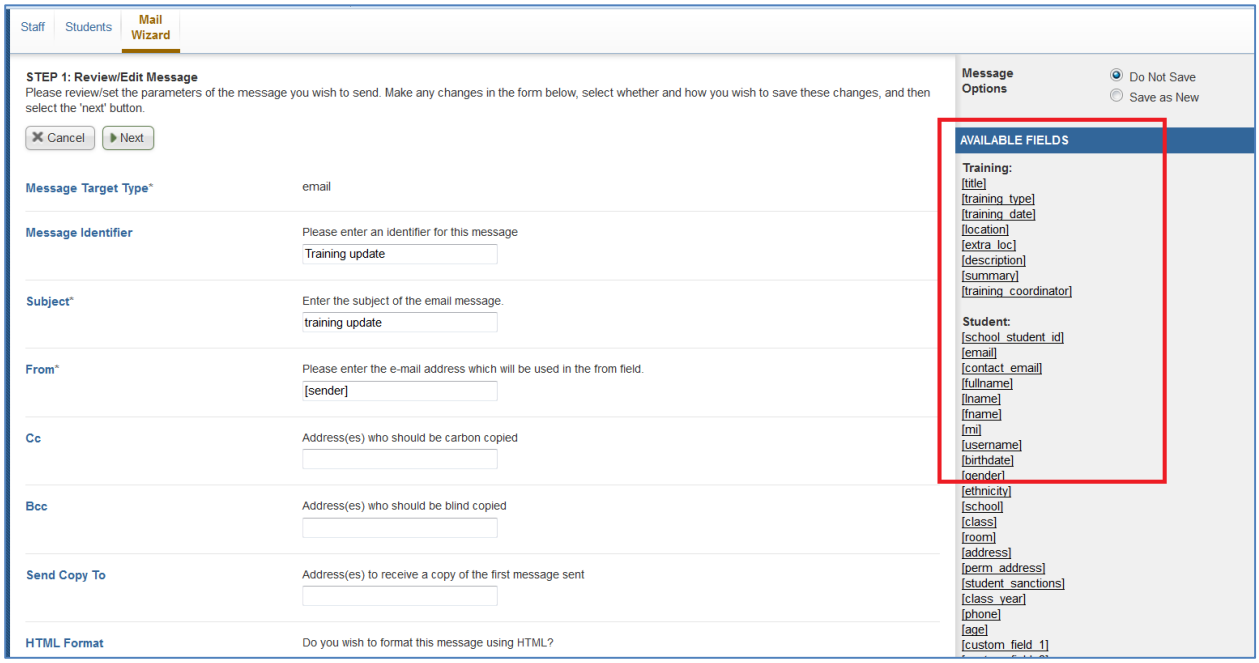
One of the last items for setting up the Training Manager module relates to adjusting the System Messages and configuring any User Messages related to Trainings (found on the left navigation menu in "Tools>Templates>User Messages/System Messages").

The two system messages you should configure are "Training Reminder Staff Notification" and "Training Reminder Student Notification." Via the User Messages>Add New Message Template button, you can create a custom message that can be sent as well.

Once participants have been added, you have the ability to email them directly from the Participants list in the training, using Batch Options>Send Email. From there, you can select a pre-existing custom message template or create a new message and send this message via the Mail Wizard tool.



Once you select a template or "[new message],' you will be taken to the Mail Wizard where you can enter the required and option data to be sent via email. In the "Message Body" you can merge data regarding participants and the training itself with your letter text via the "Available Fields" list on the right. You can merge data like Training Title, date/time of training, training location, participant name, etc.



System Settings

The final significant piece to setting up the Training Manager module relates to a review of the system settings (found on the left navigation menu in "System Settings"). These settings are global in nature and reflect all users of the system. Those setting up Advocate should review all system settings to adequately prepare the system, but review of those relating to Training Manager specifically are found in System Settings>Training Manager. The Training Manager tab in System settings has one tab that relate to specific functions in the module:

1. Enable Training Manager
2. Send training reminder to students *Default value: off*
3. Send training reminder to staff participant *Default value: off*
4. Number of days prior to the training date that an automatic reminder email should be sent to participants *Default value: 1*