

LMS Foundations

Understanding The Core Features That Matter

Josh Willcock Charity Learning Consortium



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Handle recurring training, expiries, and annual recertification.

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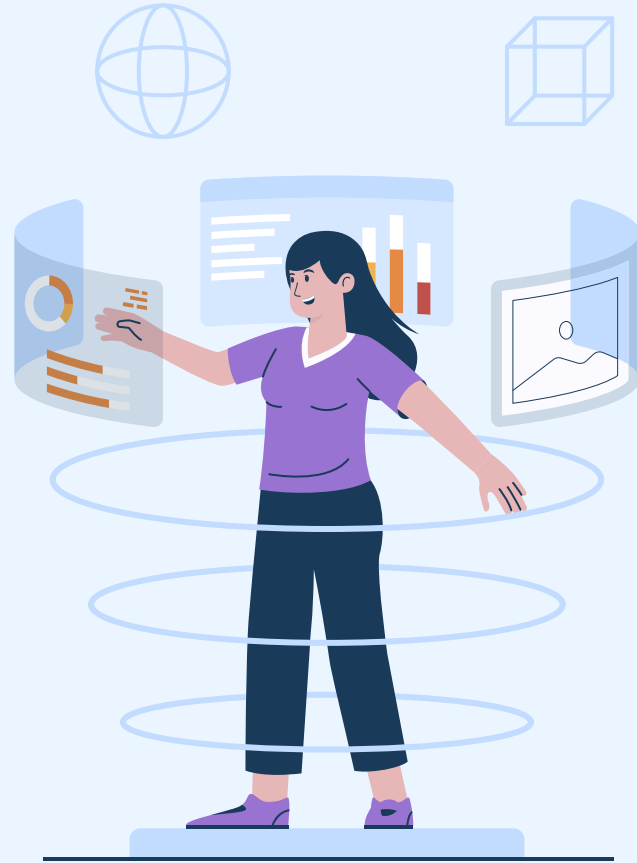
Track completion status and identify risk in real-time.



01

Allocate & Distribute

Provide the right learning to the right people.



Who are the **right** people?



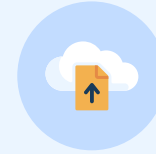
Personnel Type

Staff and volunteers have different requirements.



Department

Different regions, departments and teams have different requirements.



Job Role

Different job roles have different requirements for learning.



What is the **right** learning?



Compliance

Training **required** to meet legal, regulatory, contractual or internal policy obligations.



Capability

Training designed to **build skills, knowledge and competence** so individuals can perform their roles more effectively.



Development

Training focused on **long-term growth**, helping individuals progress, expand their potential or prepare for future roles.



The twice right **learning** card.

The example we can work through.

Personnel Type	Staff
Region / Locality	Scotland
Job Role	Retail Operative
Compliance	Manual Handling, First Aid & Data Protection
Capability	Retail Design, Customer Service handling
Development	Event Running

Learning Options:

Digital Learning | Formal Learning | Work-based Learning.
Learning Pathway | Face to face Training | Personal Development Log.



Learning Pathways Simplifying Compliance

A way of allocating grouped activity modules, resources, sections or courses to a learner **based on their role & responsibilities** feeling unique for each individual.





Site administration

- General
- Users
- Courses
- Grades
- Plugins
- Appearance
- Server
- Reports
- Development

- Notifications
- Advanced features
- Site admin presets

Learning Data Store

- Import
- Manage Types
- Import History

Learning Pathways

- Manage Pathways
- Add New Pathway
- Configuration Settings

Personal Development Log

- Browse users
- View Development Records
- Add Development Record
- Manage Custom Fields

FormTrack

- Overview

Need help?

Get in touch?



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Need help?

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Site administration

Search 🔍

General Users Courses Grades Plugins Appearance Server Reports Development

Notifications
Advanced features
Site admin presets

Learning Data Store

Import
Manage Types
Import History

Learning Pathways

Manage Pathways
Add New Pathway
Configuration Settings

Personal Development Log

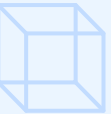
Browse users
View Development Records
Add Development Record
Manage Custom Fields

FormTrack

Overview

🔗 Need help?

🔗 Get in touch?

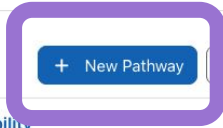


Manage Pathways

General Users Courses Grades Plugins Appearance Server Reports Development

Active Archived

Active Pathways



+ New Pathway

Filters

Pathway name	Tags	Created By	Visibility	
Staff/Scotland/Retail Operative		Josh Willcock 2 March 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Staff/Scotland/Retail Manager		Rosie Hopf 25 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Staff/EnglandWales/Retail Operative		Rosie Hopf 23 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Vols/Welcome		Rosie Hopf 12 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Vols/Outreach		Rosie Hopf 2 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Vols/People Management		Rosie Hopf 27 January 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
External/Regulatory		Rosie Hopf 19 January 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️





Manage Pathways

General Users

Active Archived

Active Pathways

Pathway name

Staff/Scotland/Retail O

Staff/Scotland/Retail M

Staff/England/Wales/Re

Vols/Welcome

Vols/Outreach

Vols/People Managemen

External/Regulatory

Create new pathway



Name ! ?

Display name ?

Pathway ID Number ?

Pathway Summary

Edit View Insert Format Tools Table Help

B *I*

p 0 words Build with tinyMCE

Pathway Image ? Maximum file size: Unlimited, maximum number of files: 3

Files

Cancel

Create new pathway



Rosie Hopf
10 January 2026

Public



Create a Pathway

Name

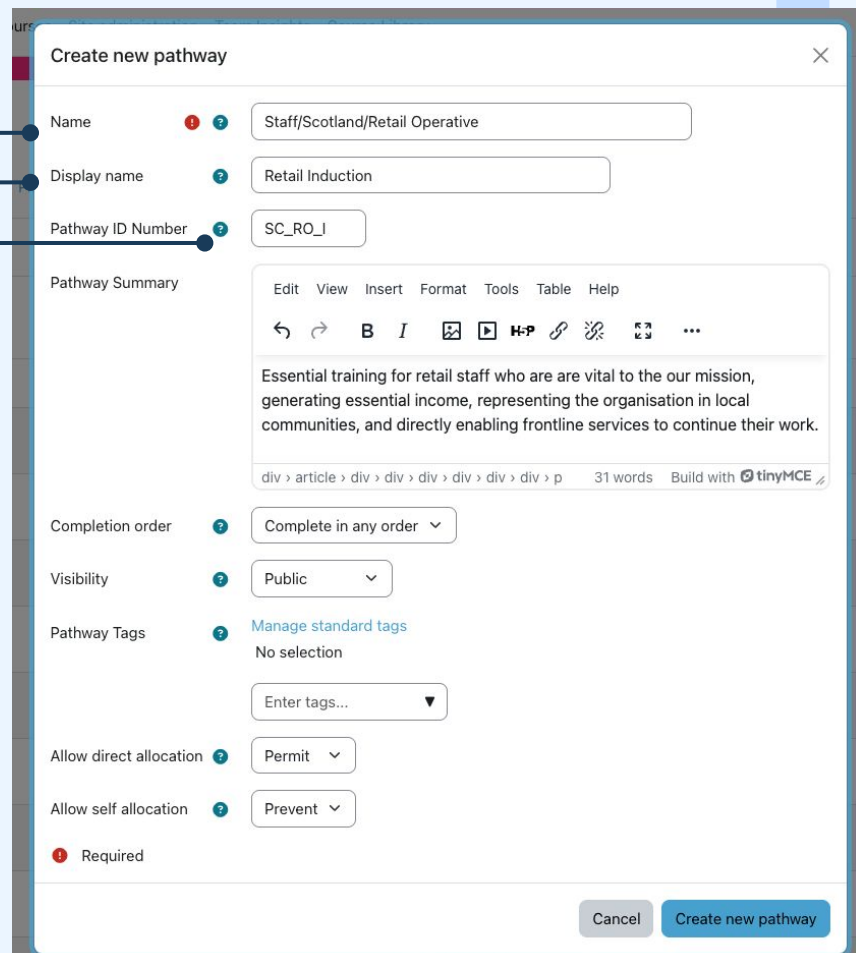
For Administrators to identify with.

Display Name

For the learners to receive.

ID Number

For data exportation requirements.



Create new pathway

Name ?

Display name ?

Pathway ID Number ?

Pathway Summary

Edit View Insert Format Tools Table Help

↶ ↷ **B** *I* **H-P**

Essential training for retail staff who are are vital to the our mission, generating essential income, representing the organisation in local communities, and directly enabling frontline services to continue their work.

div > article > div > div > div > div > div > div > p 31 words Build with tinyMCE

Completion order ?

Visibility ?

Pathway Tags ? [Manage standard tags](#)
No selection

Allow direct allocation ?

Allow self allocation ?

? Required

Manage Pathways

General Users Courses Grades Plugins Appearance Server Reports Development

Active Archived

Active Pathways

+ New Pathway Filters

Pathway name	Type	Created By	Visibility	
Staff/Scotland/Retail Operative		Josh Willcock 2 March 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Staff/Scotland/Retail Manager		Rosie Hopf 25 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Staff/EnglandWales/Retail Operative		Rosie Hopf 23 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Vols/Welcome		Rosie Hopf 12 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
Vols/Outreach		Rosie Hopf 2 February 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️
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External/Regulatory		Rosie Hopf 19 January 2026	Public	→ ⚙️ 📄 👁️ 👥 🗑️





Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Turn Editing On

Content

Name

Nothing to display

Main Completion:

Complete in any order





Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Turn Editing On

Content

Name

Nothing to display

Main Completion:

Complete in any order





Staff/Scotland/Retail O

General Users Courses Grades

Content Certificates Renewals

Content

Name

+ Core

- + The Basics of Manual Handling
- + Introduction to First Aid - iAM (within Health & Safety - Introduction)
- + Data Handling - iAM (within Data Protection)

Add group/s

Name ! ? Core 🔒

Add course/s ? No selection
Search

Add course section/s ? No selection
Search

Add activity module/s ? No selection
Search

Completion Complete in any order

! Required

Cancel Add group/s

Edit Pathway Details



Actions

- Edit Group Remove group
- Remove item
- Remove item
- Remove item

Main Completion: Complete in any order





Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users



Content

Name

Actions

Name	Actions
Core Complete in order	
The Basics of Manual Handling - iAM (within Health & Safety - Workplace ↗)	
Introduction to First Aid - iAM (within Health & Safety - Introduction ↗)	
Data Handling - iAM (within Data Protection ↗)	

Main Completion:

Complete in any order





Site Administration / Manage Pathways / Staff/Scotland/Retail Operative

Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Turn Editing On

Content

Name

Core

Complete in order

The Basics of Manual Handling - iAM (within Health & Safety - Workplace)

Introduction to First Aid - iAM (within Health & Safety - Introduction)

Data Handling - iAM (within Data Protection)

Role Essentials

Complete in order

Building a Customer Centric Culture (within Customer Service)

Handling Complaints - iAM (within Customer Relations)

Main Completion:

Complete in any order





Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Certificates

Enabled

✓ Enabled
Disabled

Issue for

Mandatory attempts only

Certificate template

Certificate demo template

Save Cancel



Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Certificates

Enabled

✓ Enabled
Disabled

Issue for

Mandatory attempts only

Certificate template

Certificate demo template

Save Cancel



Edit Pathway Details

Staff/Scotland/Retail Operative

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Content Certificates Renewals Allocation rules Schedule Users

Certificates

Enabled

✓ Enabled
Disabled

Issue for

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Certificate demo template

Save Cancel



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General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Certificates

Enabled

Enabled
Disabled

Issue for

Mandatory attempts only

Certificate template

Certificate demo template

Save Cancel

Page 1

- Background image
- ABC This certificate is awarded to
- ABC User name
- ABC For completing
- Course full name
- ABC Awarded on
- Issued date
- QR code
- Signature
- ABC M Baker
- ABC School Director
- Logo

Add element





Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Certificates

Enabled

✓ Enabled
Disabled

Issue for

Mandatory attempts only

Certificate template

Certificate demo template

Save Cancel



Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rule **Schedule** Users

Schedule

Collapse all

Availability

Set the default allocation dates for this pathway.

Start Date ? After User is Allocated days

Due Date ? After Start Date months

End Date ? After Due Date years

Allocation Window

Users can only be allocated to the pathway within this window.

Start Date ? Select Date

End Date ? After Start Date months

Save Cancel



Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules **Schedule** Users

Schedule

Collapse all

Availability

Set the default allocation dates for this pathway.

Start Date	?	After User is Allocated	0	days
Due Date	?	After Start Date	3	months
End Date	?	After Due Date	10	years

Allocation Window

Users can only be allocated to the pathway within this window.

Start Date	?	Select Date	2	March	2026	📅
End Date	?	After Start Date	12	months		

Save Cancel

?



Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules **Schedule** Users

Schedule

Collapse all

Availability

Set the default allocation dates for this pathway.

Start Date

Due Date

End Date

Allocation Window

Users can only be allocated to the pathway within this window.

Start Date

End Date

Save Cancel





[Site Administration](#) / [Manage Pathways](#) / [Staff/Scotland/Retail Operative](#)

[Edit Pathway Details](#)

Staff/Scotland/Retail Operative

[General](#) [Users](#) [Courses](#) [Grades](#) [Plugins](#) [Appearance](#) [Server](#) [Reports](#) [Development](#)

[Content](#) [Certificates](#) [Renewals](#) [Allocation rules](#) [Schedule](#) [Users](#)

Allocation rules

[Add rule](#)

Nothing to display





Edit Pathway Details

Add rule

Add rule

Allocation rule

Name ? !

Allocation Options

Start Date ?

Due Date ?

End Date ?

! Required





Site Administration / Manage Pathways / Staff/Scotland/Retail Operative

Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Allocation rules

Add rule

Description	Created By	Matched	Active
Mandatory	Josh Willcock 5 Mar 2026	0 Users Affected Never	<input type="checkbox"/>



Build Rules

Check Type

Add condition ✕

Check Type

Verb

Profile Field

Value





Build Rules

Allocation rule condition created



Check Type	Verb	Data	
Profile Field: CF - Job Role	contains	Retail Operative	
Profile Field: CF - Region	matches	Scotland	

Close

Add Condition





Site Administration / Manage Pathways / Staff/Scotland/Retail Operative

Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule Users

Allocation rules

Add rule

Description	Created By	Matched	Active	
Mandatory	Josh Willcock 5 Mar 2026	0 Users Affected Never	<input checked="" type="checkbox"/>	



Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules **Schedule** Users

Allocation rules

Add rule

Description	Created By	Matched	Active
Mandatory	 Josh Willcock 5 Mar 2026	0 Users Affected Never	<input type="checkbox"/>   

Site Administration / Manage Pathways / Staff/Scotland/Retail Operative

Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates Renewals Allocation rules Schedule **Users**

Users

Show latest attempts only

Add user

First name **All** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last name **All** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

First name / Middle name / Last name	Start Date	Due Date	End Date	Allocation Source	Last Activity	Status	Attempt	
<input type="checkbox"/> Louise Houston	5/03/2026	5/06/2026	5/06/2036	Manual	None	Allocated	1	i ⚙️ →
<input type="checkbox"/> Stu Williams	5/03/2026	5/06/2026	5/06/2036	Manual	5/03/2026	In Progress	1	i ⚙️ →

Select All on Page Unselect All

With selected users...

Send message

Go





Staff/Scotland

General Users C


Content Certificate


Users

First name All A B

Last name All A B

First name / Middle name

 Louise Houston

 Stu Williams

Select All on Page Unselect All

With selected users...

Send message

Go

Pathway Preview



Retail Induction





Essential training for retail staff who are vital to our mission, generating essential income, representing the organisation in local communities, and directly enabling frontline services to continue their work.

 Complete in any order (0/2)

 05/06/2026

Continue

>  Core
Complete all in order (1/3)

>  Role Essentials
Complete all in order (0/2)

Cancel

Edit Pathway Details

Attempts only

Add user

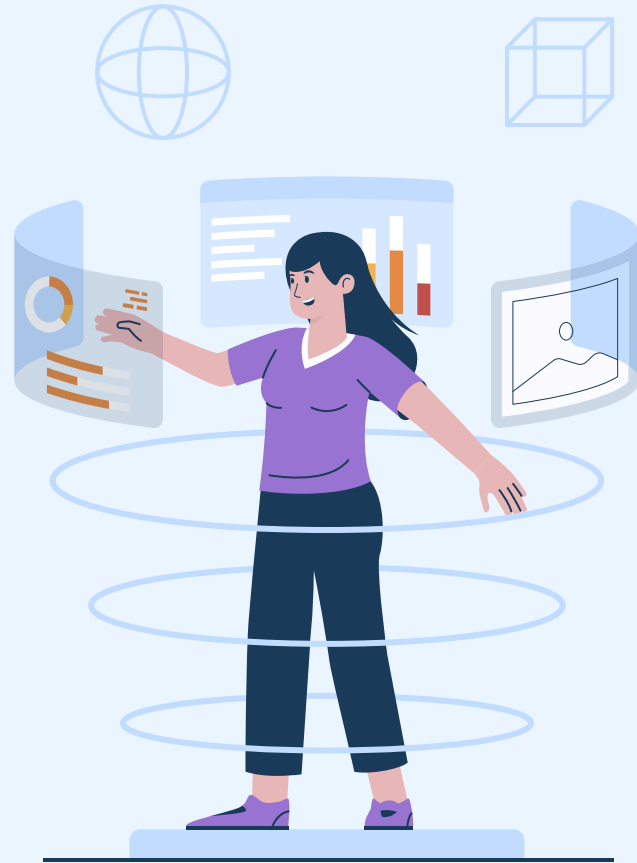
Attempt



02

Refresh & Renew

Handle recurring training, expiries, and annual recertification.



Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificate **Renewals** Allocation rules Schedule Users



Users

Show latest attempts only

Add user

First name: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last name: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

First name / Middle name / Last name	Start Date	Due Date	End Date	Allocation Source	Last Activity	Status	Attempt	
<input type="checkbox"/>  Louise Houston	5/03/2026	5/06/2026	5/06/2036	Manual	None	Allocated	1	i ⚙ →
<input type="checkbox"/>  Stu Williams	5/03/2026	5/06/2026	5/06/2036	Manual	5/03/2026	In Progress	1	i ⚙ →

Select All on Page Unselect All

With selected users...

Send message

Go





Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates **Renewals** Allocation rules Schedule Users

Renewals

Enable Renewal?

- Disabled
- Enabled
- Advanced

Renew after

After completion date 1 years

Save Cancel





Edit Pathway Details

Staff/Scotland/Retail Operative

General Users Courses Grades Plugins Appearance Server Reports Development

Content Certificates **Renewals** Allocation rules Schedule Users

Renewals

Enable Renewal?

Advanced

Core

Disabled

Role Essentials

After completion date

24

- days
- weeks
- ✓ months
- years

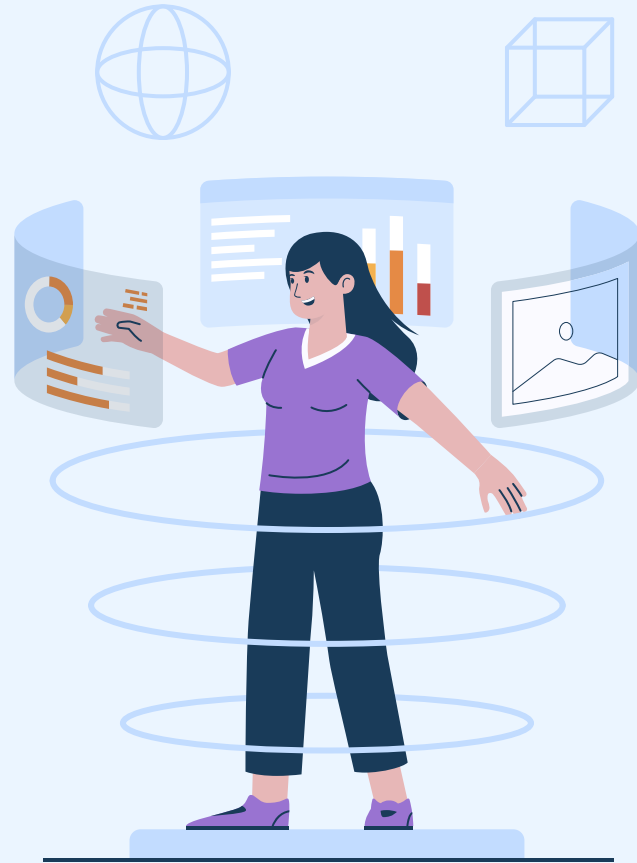
Save Cancel



03

Audit & Report

Evidence compliance with accurate, exportable audit records.



How can we see the data?



Data Syncs

Reliable, automatic **data migration & exports** for backup, processing or visibility.



Report Builder

Filterable tables with **live updates**, **easily accessible** & downloadable.



Team Insights

Real time instant visual insights to the **most critical** data your managers and leaders need.



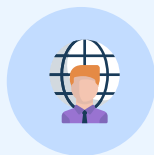


Data Sync



Inbound

You tell us to **create** users, **or fill** their profile data, or remove them.



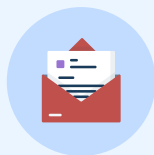
Outbound

Each day we put the records into a **file** for you to **collect** & process as you wish.



Benefits

Reliable, Stable & Automated. Once setup can run indefinitely.



Drawbacks

Records only appear the following day & requires technical resource to setup.



Report Builder



Allows Managers or Administrators to create their own reports.

Can be sent out via schedules.

Can be filtered or conditionally restricted.

Shows up to date information instantly.



Totara built a report builder in 2010.

After a legal battle the code was shared.

The CLC brought it to Moodle in 2014.

Moodle built their own from the ground up in 2019.



Site administration

- General
- Users
- Courses
- Grades
- Plugins
- Appearance
- Server
- Reports**
- Development

Reports

- Comments
- Backups
- Config changes
- Events list
- Antivirus failures
- Logs
- Live logs
- Performance overview
- Question instances
- Security checks
- System status
- Theme usage
- Accessibility toolkit
- Event monitoring rules
- Spam cleaner

AI reports

- AI policy acceptance
- AI usage

Report builder

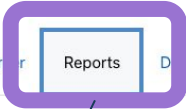
- Custom reports
- Custom report settings
- Custom report fields

MFA reports

- All factor report

Need help?

Get in touch?



Explore by the Charity Learning Consortium

Search

General Users Courses Grades Plugins Appearance Server **Reports** Development

Custom reports

[New report](#) [Filters](#)

Name	Report source	Tags	Time created ↓	Time modified	Modified by
Mandatory Reports	Group Completions		Friday, 6 March 2026, 2:24 PM	Friday, 6 March 2026, 2:24 PM	Josh James Willcock
CLC Users	Users		Monday, 24 November 2025, 11:55 AM	Monday, 24 November 2025, 11:55 AM	Louise Houston
FormTrack	Forms		Tuesday, 8 July 2025, 11:42 AM	Tuesday, 8 July 2025, 11:42 AM	Josh James Willcock
Group Completions	Group Completions		Tuesday, 1 July 2025, 11:38 AM	Tuesday, 1 July 2025, 11:38 AM	Josh James Willcock
Module list	SCORM packages		Tuesday, 1 July 2025, 9:48 AM	Wednesday, 16 July 2025, 3:18 PM	Stu Williams
Users	Users		Tuesday, 9 January 2024, 11:52 AM	Tuesday, 13 May 2025, 11:53 AM	Rosie Hopf
SCORM Attempts	SCORM SCO Tracks		Thursday, 15 June 2023, 2:09 PM	Thursday, 15 June 2023, 2:12 PM	James Underwood



New report

General

Name ! Mandatory Reports 🔒

Report source ! ? Groups

Include default setup ?

Remove any duplicate rows ?

Tags [Manage standard tags](#)
No selection

Enter tags... ▾

! Required

Cancel

Save

Explore by the

General Users C

Custom report

Name

Mandatory Reports ✎

CLC Users ✎

FormTrack ✎

Group Completions ✎

Module list ✎

Users ✎

SCORM Attempts ✎

Forms

AM

AM

Group Completions

Tuesday, 1 July 2025, 11:38 AM

Tuesday, 1 July 2025, 11:38 AM

SCORM packages

Tuesday, 1 July 2025, 9:48 AM

Wednesday, 16 July 2025, 3:18 PM

Users

Tuesday, 9 January 2024, 11:52 AM

Tuesday, 13 May 2025, 11:53 AM

SCORM SCO Tracks

Thursday, 15 June 2023, 2:09 PM

Thursday, 15 June 2023, 2:12 PM



Search

Filters

Modified by

Josh James Willcock

Rosie Houston

Josh James Willcock

Josh James Willcock

Stu Williams

Rosie Hopf

James Underwood





New report

General

Name ! Mandatory Reports

Report source ! ? Group Completions

Include default setup ?

Remove any duplicate rows ?

Tags [Manage standard tags](#)
No selection

Enter tags... ▾

- Site
- Badges
- Blogs
- Cohorts
- Comments**
- Competencies
- Course categories
- Course completions
- Course participants
- Courses
- Files
- Groups
- Messages
- Notes
- Roles
- Tags
- Task logs
- User badges
- Users

- FormTrack
- Forms**
- Course recompletion
- Archive of activity completions
- Archive of course completions
- Archive of H5P attempts (mod_h5pactivity)
- Archive of hotpot attempts
- Archive of issued certificates (mod_certificate)
- Archive of issued certificates (mod_customcert)
- Archive of lesson grades
- Archive of quiz attempts
- Archive of quiz grades
- Face-to-Face
- Face to Face Sessions
- Face to Face Signups
- Forum
- Forum posts

- Quiz
- Quiz Attempts
- Quizzes
- SCORM package
- SCORM packages
- SCORM SCO Tracks
- Certificate manager
- Certificate templates
- Issued certificates
- Learning Data Store
- Learning Data Store
- Learning Pathways
- Archive of Group Completions
- Group Completions
- Learning Pathways
- Pathway Completions
- Personal Development Log
- Personal Development Records





Mandatory Reports

Edit details

Close

Editor

Audience

Schedules

Access

Search

Preview

- Learning Pathway ^
- Name +
- Display name +
- Pathway ID Number +
- Archived +

- Pathway Group Completion ^
- Start Date +
- Time Completed +
- Last Interaction +

- User ^
- Full name +
- Full name with link +
- Full name with picture +

LEARNING PATHWAY GROUP - NAME x	USER - FULL NAME x	USER - USERNAME
Name	Full name	Username
No aggregation v	No aggregation v	No aggregation v
k 1	James Underwood	junderwood@charityle
k 2	James Underwood	junderwood@charityle
k 3	James Underwood	junderwood@charityle
rse Activity Types	James Underwood	junderwood@charityle
rse Resource Types	James Underwood	junderwood@charityle
datory Courses	James Underwood	junderwood@charityle
lth & Social Care	James Underwood	junderwood@charityle
lth & Safety	James Underwood	junderwood@charityle
eguarding	James Underwood	junderwood@charityle

Conditions ? ^

Select a condition v

There are no conditions selected

Filters ? v

Sorting ? v

Card view ? v



Mandatory Reports

Edit details Close

Editor Audience Schedules Access

Search

- Learning Pathway ^
- Name +
- Display name +
- Pathway ID Number +
- Archived +
- Pathway Group Completion ^
- Start Date +
- Time Completed +
- Last Interaction +
- User ^
- Full name +
- Full name with link +
- Full name with picture +

Preview

Name	Full name	Username
No aggregation	No aggregation	No aggregatic
Week 1	James Underwood	junderwood@ch
Week 2	James Underwood	junderwood@ch
Week 3	James Underwood	junderwood@ch
Course Activity Types	James Underwood	junderwood@ch
Course Resource Types	James Underwood	junderwood@ch
Mandatory Courses	James Underwood	junderwood@ch
Health & Social Care	James Underwood	junderwood@ch
Health & Safety	James Underwood	junderwood@ch
Safeguarding	James Underwood	junderwood@ch

Conditions ? ^

Select a condition ▼

There are no conditions selected

Filters ? ▼

Sorting ? ▼

Card view ? ▼

Mandatory Reports

Edit details

Close

Editor

Audience

Schedules

Access

Search

Preview

Conditions

Select a condition

There are no conditions selected

Filters

Sorting

Card view

Learning Pathway

Name

Display name

Pathway ID Number

Archived

Pathway Group Completion

Start Date

Time Completed

Last Interaction

User

Full name

Full name with link

Full name with picture

LEARNING PATHWAY GROUP · NAME ×

USER · FULL NAME ×

USER · USERI

Name

No aggregation

Full name

No aggregation

Username

No aggregat

Week 1

James Underwood

junderwood@ch

Week 2

James Underwood

junderwood@ch

Week 3

James Underwood

junderwood@ch

Course Activity Types

James Underwood

junderwood@ch

Course Resource Types

James Underwood

junderwood@ch

Mandatory Courses

James Underwood

junderwood@ch

Health & Social Care

James Underwood

junderwood@ch

Health & Safety

James Underwood

junderwood@ch

Safeguarding

James Underwood

junderwood@ch



Mandatory Reports

Edit details

Close

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Schedules

Access

Search

- Learning Pathway ^
- Name +
- Display name +
- Pathway ID Number +
- Archived +

- Pathway Group Completion ^
- Start Date +
- Time Completed +
- Last Interaction +

- User ^
- Full name +
- Full name with link +
- Full name with picture +

Preview

LEARNING PATHWAY GROUP · NAME ×	USER · FULL NAME ×	USER · USER
Name	Full name	Username
No aggregation ▾		
Week 1	James Underwood	junderwood@ch
Week 2	James Underwood	junderwood@ch
Week 3	James Underwood	junderwood@ch
Course Activity Types	James Underwood	junderwood@ch
Course Resource Types	James Underwood	junderwood@ch
Mandatory Courses	James Underwood	junderwood@ch
Health & Social Care	James Underwood	junderwood@ch
Health & Safety	James Underwood	junderwood@ch
Safeguarding	James Underwood	junderwood@ch

Conditions

Select a condition ▾

There are no conditions selected

Filters ▾

Sorting ▾

Card view ▾





Mandatory Reports

Conditions applied

Edit details

Close

Editor

Audience

Schedules

Access

Search

Preview

- Learning Pathway ^
- Name +
- Display name +
- Pathway ID Number +
- Archived +

- Pathway Group Completion ^
- Start Date +
- Time Completed +
- Last Interaction +

- User ^
- Full name +
- Full name with link +
- Full name with picture +

LEARNING PATHWAY GROUP · NAME ×	USER · FULL NAME ×	USER · USER ×
Name	Full name	Username
No aggregation ▾	No aggregation ▾	No aggregation ▾

Nothing to display

Conditions

Select a condition ▾

- COMPLETION RECORD · DUE DATE** ×
Next ▾ 1 month(▾
- PATHWAY GROUP COMPLETION · TIME COMPLETED** ×
Is not empty ▾

Apply Reset all

Filters ▾

Sorting ▾

Card view ▾



Mandatory Reports

Edit details Close

Editor Audience Schedules Access

Search

- Learning Pathway ^
- Name +
- Display name +
- Pathway ID Number +
- Archived +

- Pathway Group Completion ^
- Start Date +
- Time Completed +
- Last Interaction +

- User ^
- Full name +
- Full name with link +
- Full name with picture +

Preview

Name	Full name	Username
Week 1	James Underwood	junderwood@ch
Week 2	James Underwood	junderwood@ch
Week 3	James Underwood	junderwood@ch
Course Activity Types	James Underwood	junderwood@ch
Course Resource Types	James Underwood	junderwood@ch
Mandatory Courses	James Underwood	junderwood@ch
Health & Social Care	James Underwood	junderwood@ch
Health & Safety	James Underwood	junderwood@ch
Safeguarding	James Underwood	junderwood@ch

Conditions ?

Filters ?

Select a filter

- LEARNING PATHWAY GROUP · NAME Name
- USER · FULL NAME Full name
- USER · USERNAME Username
- PATHWAY GROUP COMPLETION · TIME COMPLETED Time Completed

Sorting ?

Card view ?





Mandatory Reports

Edit details Close

Editor Audience Schedules Access

Search

Preview

- Learning Pathway ^
- Name +
- Display name +
- Pathway ID Number +
- Archived +

- Pathway Group Completion ^
- Start Date +
- Time Completed +
- Last Interaction +

- User ^
- Full name +
- Full name with link +
- Full name with picture +

Name	Full name	Username
No aggregation	No aggregation	No aggregation
Week 1	James Underwood	junderwood@ch
Week 2	James Underwood	junderwood@ch
Week 3	James Underwood	junderwood@ch
Course Activity Types	James Underwood	junderwood@ch
Course Resource Types	James Underwood	junderwood@ch
Mandatory Courses	James Underwood	junderwood@ch
Health & Social Care	James Underwood	junderwood@ch
Health & Safety	James Underwood	junderwood@ch
Safeguarding	James Underwood	junderwood@ch

Conditions ?

Filters ?

- Select a filter
- LEARNING PATHWAY GROUP · NAME Name
 - USER · FULL NAME Full name
 - USER · USERNAME Username
 - PATHWAY GROUP COMPLETION · TIME COMPLETED Time Completed

Sorting ?

Card view ?





Mandatory Reports

Edit details Close

Editor Audience Schedules Access

Search

- Site ^
- All users +
- Assigned system role +**
- Manually added users +
- Member of cohort i
- Site administrators +

Assigned system role

Manager

OR

Assigned system role

Audience not saved

Select a role No selection

Required



Mandatory Reports

Edit details

Close

Editor

Audience

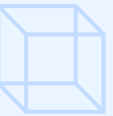
Schedules

Access

New schedule ▾

Filters

Nothing to display





Mandatory Reports

Editor Audience Schedules

Nothing to display

Edit details

Close

New schedule



Collapse all

General

Name ! Due Soon

Format Portable Document Format (.pdf) ▾

Starting from 20 ▾ March ▾ 2026 ▾ 09 ▾ 30 ▾

Recurrence Monthly ▾

View report data as Schedule recipient ▾

Audience

Assigned system role: Manager

Message content

Subject ! Outstanding Compliance

Body !

Edit View Insert Format Tools Table Help

↶ ↷ **B** *I* **H-P** ...

Hi,

Unfortunately some of your people have not finished their essential training which will cause significant problems for us. Could you give them a nudge and see if they need any help please?

Thanks

Cancel

Save

New schedule ▾

Filters





Mandatory Reports

Editor Audience Schedules

Nothing to display

Edit details

Close

New schedule ▾

Filters ▾

New schedule



View report data as

▼ Audience

Assigned system role: Manager

▼ Message content

Subject !

Body !

Edit View Insert Format Tools Table Help

↶ ↷ **B** *I* **H-P** ...

Hi,

Unfortunately some of your people have not finished their essential training which will cause significant problems for us. Could you give them a nudge and see if they need any help please?

Thanks

p 34 words Build with tinyMCE

▼ Advanced

If the report is empty

! Required

Cancel

Save





Mandatory Reports

Edit details

Close

Editor

Audience

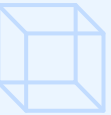
Schedules

Access

New schedule ▾

Filters

	Name	Time last sent	Time next send	Format	Time created ↓↑	Time modified	Modified by	
<input checked="" type="checkbox"/>	Due Soon ✎	Never	Friday, 20 March 2026, 9:30 AM	Portable Document Format (.pdf)	Monday, 9 March 2026, 12:43 PM	Monday, 9 March 2026, 12:43 PM	Josh James Willcock	⋮





Mandatory Reports

Edit details Close

Editor Audience Schedules Access

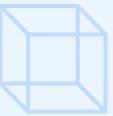
New schedule ▾

Filters

	Name	Time last sent	Time next send	Format	Time created ↓↑	Time modified	Modified by	
<input checked="" type="checkbox"/>	Due Soon ✎	Never	Friday, 20 March 2026, 9:30 AM	Portable Document Format (.pdf)	Monday, 9 March 2026, 12:43 PM	Monday, 9 March 2026, 12:43 PM	Josh James Willcock	⋮

Friday Morning, let managers know of intervention opportunities

[Learning Pathways Completion] [Due Date] is [in the next week]
[Learning Pathways Group Completion] [Time Completed] is [empty]





Mandatory Reports

[Edit details](#)[Close](#)[Editor](#)[Audience](#)[Schedules](#)[Access](#)[New schedule](#) ▾[Filters](#)

	Name	Time last sent	Time next send	Format	Time created ↓↑	Time modified	Modified by	
<input checked="" type="checkbox"/>	Due Soon ✎	Never	Friday, 20 March 2026, 9:30 AM	Portable Document Format (.pdf)	Monday, 9 March 2026, 12:43 PM	Monday, 9 March 2026, 12:43 PM	Josh James Willcock	⋮

Warehouse Director - Overdue Notice (Hierarchy not needed)

[Learning Pathways Completion] [Due Date] is [in the 3 months]
[Learning Pathways Group Completion] [Time Completed] is [empty]
[User] info field [Department] equals [Warehouse]
+ Change 'view report data as creator'





Mandatory Reports

[Edit details](#)[Close](#)[Editor](#)[Audience](#)[Schedules](#)[Access](#)[New schedule](#) ▾[Filters](#)

	Name	Time last sent	Time next send	Format	Time created ↓↑	Time modified	Modified by	
<input checked="" type="checkbox"/>	Due Soon ✎	Never	Friday, 20 March 2026, 9:30 AM	Portable Document Format (.pdf)	Monday, 9 March 2026, 12:43 PM	Monday, 9 March 2026, 12:43 PM	Josh James Willcock	⋮

Re-engagement opportunity?

[Learning Pathways Completion] [Time Completed] is [empty]

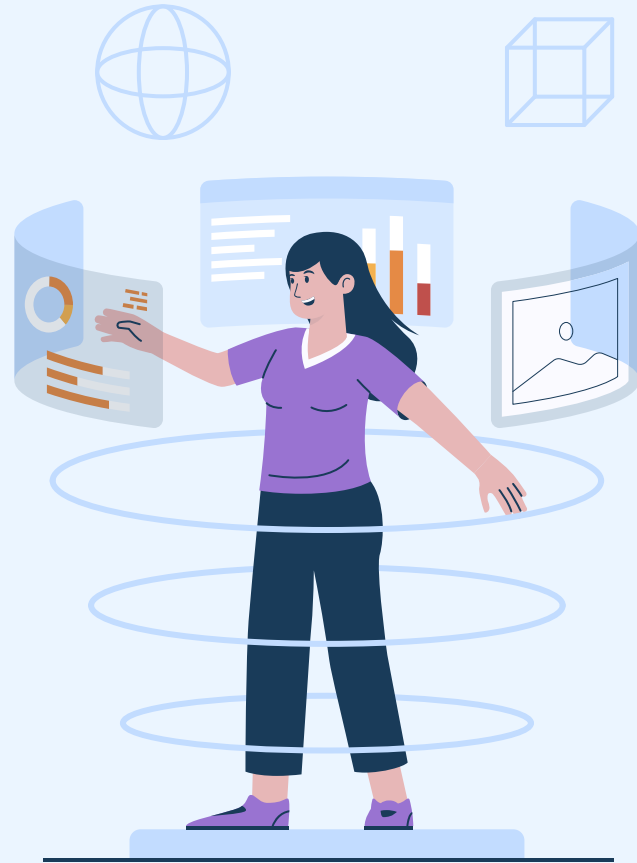
[Learning Pathways Completion] [Last Interaction] is [before 2 weeks ago]



04

Identify & Monitor

Track completion status and identify risk in real-time.



Team Insights

- 📄 Training Overview
- 👥 Team Overview
- 📄 Reports
- 📊 Compliance Insights
- 📊 Cyber Security Insights
- 📊 L&D Insights
- 📊 Chart Type Examples
- 📊 Pathway Compliance

Compliance Alerts.

We have identified that there are 200 learner/s in your team who are showing as having compliance training with due dates in the next 30 days.

[View Report](#)



Personal Development Log



- Suggested
- Planned
- Waiting validation
- Completed

[Records](#)

[Users](#)

[Add](#)

First name / Middle name / Last name

First name / Middle name / Last name	Entry	Status	Due date	Validated	Time added
Cat Gordon	Safeguarding	Completed		Awaiting validation	Tuesday, 3 March 2026, 4:17 PM
Kelly Canham	CIPD workshop	Completed		Awaiting validation	Wednesday, 3 December 2025, 3:55 PM
Wendy Test User	CRM Training	Suggested Overdue	30, November 2024	Not validated	Thursday, 7 November 2024, 5:42 PM
Wendy Stanley	CRM Training	Suggested Overdue	30, November 2024	Not validated	Thursday, 7 November 2024, 5:39 PM

?

Team Insights

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- Team Overview
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Compliance Alerts.

We have identified that there are 200 learner/s in your team who are showing as having compliance training with due dates in the next

[View Report](#)



42



1341



15



369

Personal Development Log



- Suggested
- Planned
- Waiting validation
- Completed

[Records](#) [Users](#)

[Add](#)

First name / Middle name / Last name

First name / Middle name / Last name	Entry	Status	Due date	Validated	Time added
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?

Team Insights

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Compliance Alerts.

We have identified the following potential compliance issues with some members of your team. Please assist them in completing any outstanding training. If there is any issue in resolving this please contact the Learning and Development team urgently.

Learner Name	Issue	Actions
James Underwood	<ul style="list-style-type: none"> Learning Pathway: Pathway 2 - Course Formats & Activities is overdue (5/04/22) Learning Pathway: CLC Compliance is overdue (15/10/25) 	<ul style="list-style-type: none"> Person icon Message icon
Charlotte Evans	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (14/07/22) 	<ul style="list-style-type: none"> Person icon Message icon
Alex Horseman	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (6/01/24) 	<ul style="list-style-type: none"> Person icon Message icon
Wendy Stanley	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (23/04/24) 	<ul style="list-style-type: none"> Person icon Message icon
Clint Golding	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (24/04/24) 	<ul style="list-style-type: none"> Person icon Message icon
Sam Haighton	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (2/07/24) Learning Pathway: Personal Development Pathway is overdue (3/10/25) Learning Pathway: Charity Essentials is overdue (28/02/26) 	<ul style="list-style-type: none"> Person icon Message icon
Jonathan Nelson	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (10/10/24) 	<ul style="list-style-type: none"> Person icon Message icon
Wendy Test User	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (5/12/24) 	<ul style="list-style-type: none"> Person icon Message icon
Ajay Dhaliwal	<ul style="list-style-type: none"> Learning Pathway: Pathway 1 - Your Induction is overdue (12/05/25) 	<ul style="list-style-type: none"> Person icon Message icon

Cancel



g with due dates in the next



dated	Time added
iting dation	Tuesday, 3 March 2026, 4:17 PM
iting dation	Wednesday, 3 December 2025, 3:55 PM
dated	Thursday, 7 November 2024, 5:42 PM
	Thursday, 7 November 2024, 5:39 PM

Overdue 2024

validated



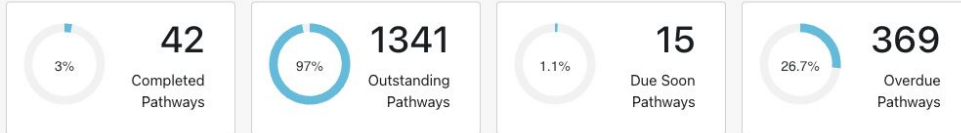
Team Insights

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Compliance Alerts.

We have identified that there are 200 learner/s in your team who are showing as having compliance training with due dates in the next 30 days.

[View Report](#)



Personal Development Log



- Suggested
- Planned
- Waiting validation
- Completed

[Records](#) [Users](#)

[Add](#)

First name / Middle name / Last name	Entry	Status	Due date	Validated	Time added
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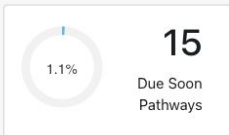
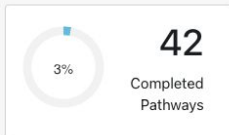
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[View Report](#)



Personal Development Log



- Suggested
- Planned
- Waiting validation
- Completed

[Records](#) [Users](#)
[Add](#)

First name / Middle name / Last name

First name / Middle name / Last name	Entry	Status	Due date	Validated	Time added
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Concerns | Name | Filters (1) | Showing 17 of 17 matches, 904 total users

 Ajay Dhaliwal Support	 Alex Horseman Sales	 Amberlie Hyde Marketing
Overall 49% Allocations 8	Overall 0% Allocations 2	Overall 90% Allocations 6
 Emily Kendall Membership	 James Teague	 James Underwood Support
Overall 78% Allocations 7	Overall 54% Allocations 6	Overall 78% Allocations 9
 Jen Davies	 Josh Bradshaw Account Management	 Josh Willcock Development
Overall 0% Allocations 2	Overall 46% Allocations 6	Overall 0% Allocations 2
 Louise Houston Membership	 Rosie Hopf Sales	 Sam Haighton Sales
		

Team Insights

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Team Overview

Reports

Compliance Insights

Cyber Security Insights

L&D Insights

Chart Type Examples

Pathway Compliance

Concerns

Name

Filters (1)

Showing 17 of 17 matches, 904 total users

A Ajay Dhaliwal
Support

Overall **49%** Allocations 8

A Alex Horseman
Sales

Overall **0%** Allocations 2

View User's Profile
Message User

A Amberlie Hyde
Marketing

Overall **90%** Allocations 6

0% Pathway 1 - Your Induction
2 months overdue

0% Example Learning Pathway - Compliance
Due in 2 years

E Emily Kendall
Membership

Overall **78%** Allocations 7

J James Teague

Overall **54%** Allocations 6

James Underwood
Support

Overall **78%** Allocations 9

Jen Davies

Josh Bradshaw
Account Management

Josh Willcock
Development



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Concerns Name Filters (1) Showing 17 of 17 matches, 904 total users

A Ajay Dhaliwal Support
Overall **49%** Allocations 8

A Alex Horseman Sales
Overall **0%** Allocations 2

View User's Profile
Message User

A Amberlie Hyde Marketing
Overall **90%** Allocations 6

Pathway 1 - Your Induction
0% 2 months overdue

Example Learning Pathway - Compliance
0% Due in 2 years

E Emily Kendall Membership
Overall **78%** Allocations 7

J James Teague
Overall **54%** Allocations 6

J James Underwood Support
Overall **78%** Allocations 9

J Jen Davies

J Josh Bradshaw Account Management

J Josh Willcock Development





Team Insights

📢 Training Overview

👤 Team Overview

📄 Reports

📊 Compliance Insights

📊 Cyber Security Insights

📊 L&D Insights

📊 Chart Type Examples

📊 Pathway Compliance

RAG Report

🔍 View

This report shows the status of select mandatory pathways for each user.

Pathways by User

🔍 View

This report shows overall progress of users across their mandatory pathways.

Pathways by CF - Region

🔍 View

This report shows overall progress of mandatory Learning Pathways grouped by CF - Region.

Pathways by CF - Job ...

🔍 View

This report shows overall progress of mandatory Learning Pathways grouped by CF - Job Role.



Team Insights

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- L&D Insights
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RAG Report

This report shows the status of select mandatory pathways for each user.

Select Pathways Filters (0) Close

Users name	Essential Learning Pathway - Demo-1726504251	Pathway 1 - Your Induction	Pathway 2 - Course Formats & Activities	Compliance - Example Learning Pathway	Personal Development - Example Learning Pathway -1726504271
James Underwood		Completed 5/04/2022	In Progress 5/04/2022	In Progress 12/01/2028	
Josh Willcock					
Louise Houston		Allocated 1/04/2027			
Rosie Hopf			In Progress 27/02/2026	Completed 10/01/2027	Allocated 13/05/2025
Josh Hargreaves					

1 2 3 4 5 6 7 8 9 10 ... 183 »

Show all 911

Download table data as

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Team Insights

Training Overview

Team Overview

Reports

Compliance Insights

Cyber Security Insights

L&D Insights

Chart Type Examples

Pathway Compliance

RAG Report

View

This report shows the status of select mandatory pathways for each user.

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This report shows overall progress of mandatory Learning Pathways grouped by CF - Region.

Pathways by CF - Job ...

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Team Insights

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- Team Overview
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- Cyber Security Insights
- L&D Insights
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- Pathway Compliance

Pathways by CF - Region

This report shows overall progress of mandatory Learning Pathways grouped by CF - Region.

Close

User Group	Pathways Allocated	Combined Percentage	Not Started	In Progress	Completed	Compliance Rate	Overdue	Due Soon
Not Set	1328	<div style="width: 100%;"></div>	1278	30	20	<div style="width: 100%;"></div> 100%	348	960
Account Management	7	<div style="width: 54%;"></div> 54%	2	2	3	<div style="width: 100%;"></div> 100%	4	0
Development	3	<div style="width: 33%;"></div> 33%	2	0	1	<div style="width: 0%;"></div>	2	0
Marketing	14	<div style="width: 80%;"></div> 80%	0	4	10	<div style="width: 100%;"></div> 100%	3	1
Membership	25	<div style="width: 54%;"></div> 54%	8	5	12	<div style="width: 100%;"></div> 100%	7	6

1 2 »

Show all 7

Download table data as Download



Team Insights

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- 👤 Team Overview
- 📄 Reports**
- 📊 Compliance Insights
- 📊 Cyber Security Insights
- 📊 L&D Insights
- 📊 Chart Type Examples
- 📊 Pathway Compliance

Pathways by CF - Region

This report shows overall progress of mandatory Learning Pathways grouped by CF - Region.

Close

User Group	Pathways Allocated	Combined Percentage	Not Started	In Progress	Completed	Compliance Rate	Overdue	Due Soon
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Account Management	7	<div style="width: 54%;"></div> 54%	2	2	3	<div style="width: 100%;"></div> 100%	4	0
Development	3	<div style="width: 33%;"></div> 33%	2	0	1	<div style="width: 0%;"></div>	2	0
Marketing	14	<div style="width: 80%;"></div> 80%	0	4	10	<div style="width: 100%;"></div> 100%	3	1
Membership	25	<div style="width: 54%;"></div> 54%	8	5	12	<div style="width: 100%;"></div> 100%	7	6

1 2 »

Show all 7

Download table data as

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Team Insights

- 📄 Training Overview
- 👤 Team Overview
- 📄 Reports
- 🔗 **Compliance Insights**
- 🔗 Cyber Security Insights
- 🔗 L&D Insights
- 🔗 Chart Type Examples
- 🔗 Pathway Compliance

Show **3 Months** Ending **09/03/202€** [Update](#)

Completed Learning Pathways

The number of Learning Pathways which have been completed.

3%

Overdue Pathways

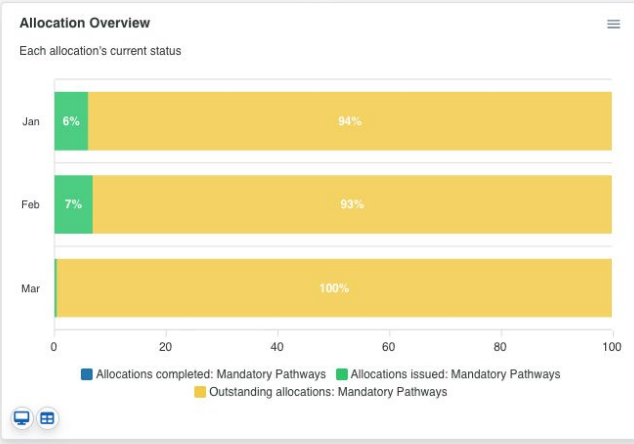
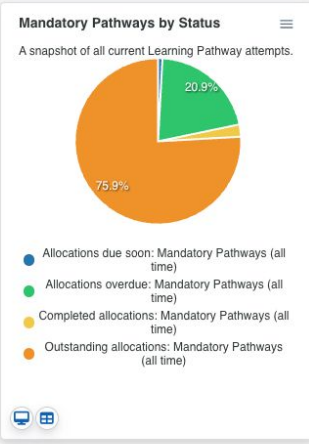
Click to go back, hold to see history
The number of Outstanding Learning Pathways which are Overdue.

27.5%

Quick Insights

The immediate information regarding mandatory Learning Pathway allocations.

[Contact The Team](#)



User Onboarding Insights ?



Team Insights

Tab Manager

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- Cyber Security Insights
- L&D Insights
- Chart Type Examples
- Pathway Compliance

Show: 3 Months Ending: 09/03/202€ Update

Completed Learning Pathways

The number of Learning Pathways which have been completed.

3%

Overdue Pathways

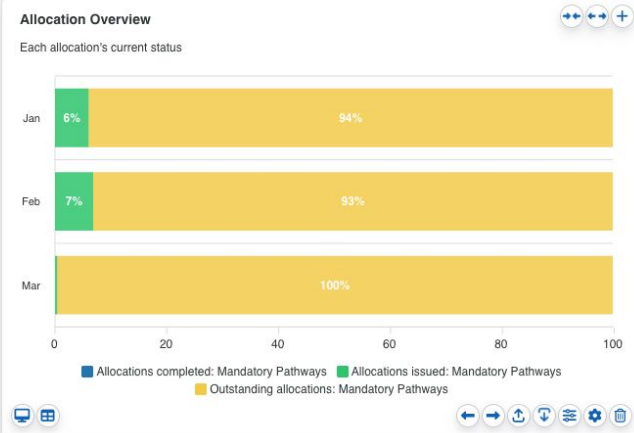
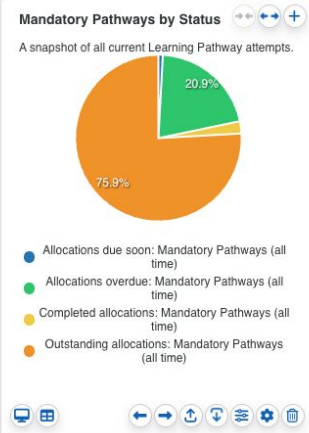
The number of Outstanding Learning Pathways which are Overdue.

27.5%

Quick Insights

The immediate information regarding mandatory Learning Pathway allocations.

Contact The Team



User Onboarding Insights



Table of contents

01

Allocate & Distribute

Provide the right learning to the right people.

03

Audit & Report

Evidence compliance with accurate, exportable audit records.

02

Refresh & Renew

Handle recurring training, expiries, and annual recertification.

04

Identify & Monitor

Track completion status and identify risk in real-time.





21%

Overdue Mandatory Learning Pathways

40%

Outstanding Mandatory Learning Pathways



1,370,257

Active Learning Pathways



The twice right **learning** card.

The example we can work through.

Personnel Type	Staff
Region / Locality	Scotland
Job Role	Retail Operative
Compliance	Manual Handling, First Aid & Data Protection
Capability	Retail Design, Customer Service handling
Development	Event Running

Learning Options:

Digital Learning | Formal Learning | Work-based Learning.
Learning Pathway | Face to face Training | Personal Development Log.



Site administration

General Users Courses Grades Plugins Appearance Server Reports Development

Learning Pathways

Manage Pathways
Add New Pathway
Configuration Settings

Personal Development Log

Browse users
View Development Records
Add Development Record
Manage Custom Fields

FormTrack

Overview

Edit mode

Profile

My learning

Calendar

Messages

Private files

Personal Development Log

Preferences

Language ▶

Switch role to...

Log out

Need help?

Get in touch?



Development Records

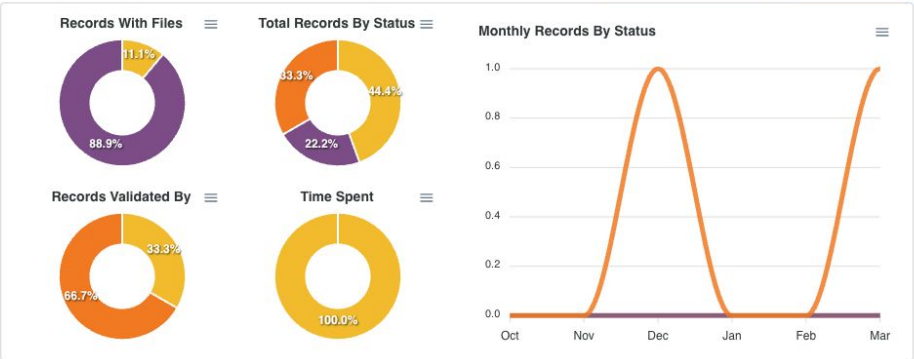
General Users Courses Grades Plugins Appearance Server Reports Development

Awaiting Validation + Add Record

Users
11

Files
3

Records
18



Name	User	Added By	Files	Progress	Due date	Status
CRM Training	WT Wendy Test User	Wendy Stanley		Suggested Overdue	30 November 2024	Not ready for validation
CRM Training	Wendy Stanley	Wendy Stanley		Suggested Overdue	30 November 2024	Not ready for validation
CRM Training	Wendy Stanley	Wendy Stanley	1	Suggested Overdue	1 December 2024	Not ready for validation
Test	Louise Houston	Louise Houston		Completed	25 October 2024	Validated by Louise Houston Site Administrator



Development Records

General Users Courses

Users

11

Files

3

Records

18

Name

CRM Training

CRM Training

CRM Training

Test

PDL Records

Name

Host an event

Description

Edit View Insert Format Tools Table Help



Host a fundraising event using candles from the upcoming tealight campaign.

[Get candles here](#)

- Lead an event with 20 guests.
- Raise over £50.
- Share 3 photos on social media.

ul > li 30 words Build with tinyMCE

Users

Josh Bradshaw - jbradshaw@charitylearning.org
Josh Willcock - jwillcock@charitylearning.org
Josh Willcock - jwillcock@charitylearning.org
Josh Willcock - jwillcock@charitylearning.org
Josh Willcock - jwillcock@charitylearning.org
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Josh Willcock - jwillcock@charitylearning.org
Josh Willcock - jwillcock@charitylearning.org
Josh Willcock - jwillcock@charitylearning.org

Record Status

Suggested

Time required (hours)

5

Due date

Enable

9

March

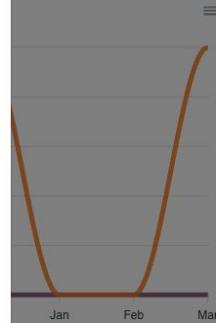
2026

Cancel

Save changes



Validation + Add Record



Validation Validation Validation

Louise Houston

Site Administrator



Host an event

Status

Suggested

Edit

Time required

5 hours

Tab groups

Files

N/A

New Comment

Description

Host a fundraising event using candles from the upcoming tealight campaign.

[Get candles here](#)

- Lead an event with 20 guests.
- Raise over £50.
- Share 3 photos on social media.



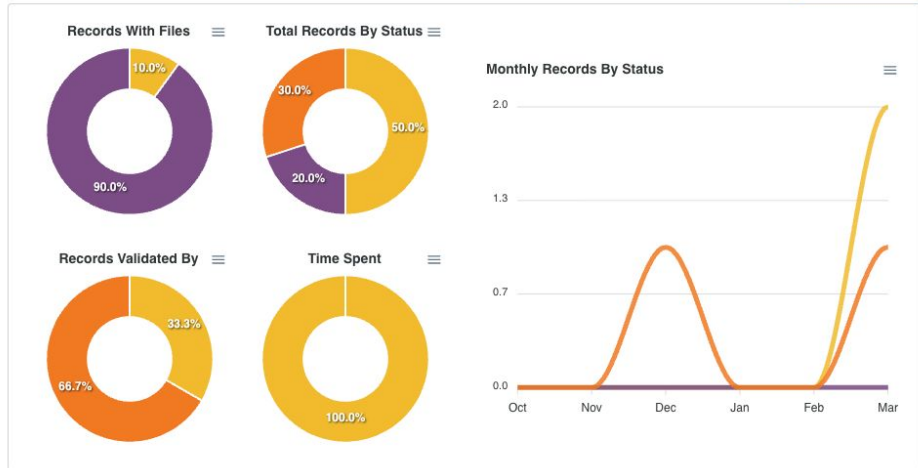
Personal Development Log / Josh Willcock

General Users Courses Grades Plugins Appearance Server Reports Development

Josh Willcock

+ Add Record

Time logged this year
N/A
Time logged this month
N/A
Time logged total
N/A
Number of records
1
Number of files
N/A



Name	Added By	Files	Progress	Due date	Status
Host an event	Josh Willcock		Suggested		Not ready for validation





Any Questions?

Josh Willcock
jwillcock@charitylearning.org