Online Training Portal User Guide

This guide will help answer questions users may have while documenting a training course or session using the online training portal. This online training portal exists for the purpose of documenting training that is not captured in UA's Training Academy. Individuals conducting training courses and/or session, as well as UA employees who have completed training outside of UA and needs to document and report their training.

For more information regarding training documentation and help using this portal, contact the Office of Compliance, Ethics, and Regulatory Affairs at compliance@fa.ua.edu*.*
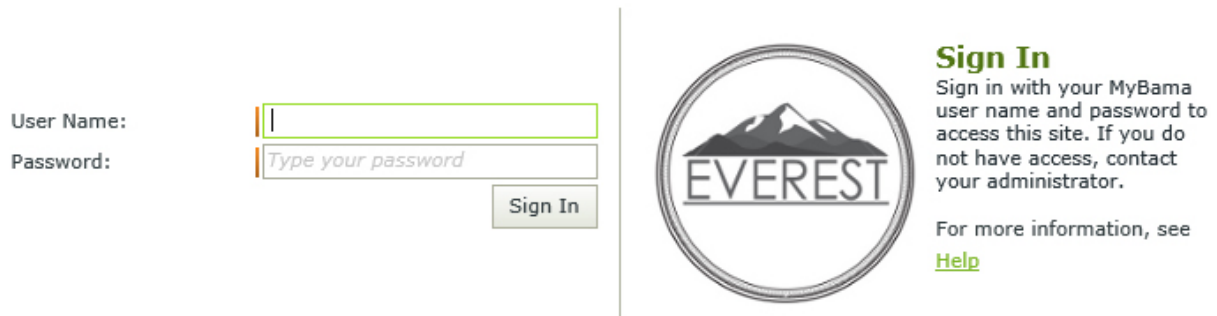
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Everest Sign In

Users accessing the online training portal will log in to Everest using their myBama username and password.

All training not registered using UA's Training Academy, both University or third party hosted, will need to be documented using this online portal.

Training Portal Main Page

Once logged in, users will be directed to the online training portal main page. On this page, users can register a new training course, add a new session to a new or existing course, or register a training session that was completed as a trainee outside of UA (i.e. online, at a conference or through another organization.)

The training portal main page will be unique to each individual user. On the main page, users will see all training courses they instruct, as well as all training session they have personal attended.
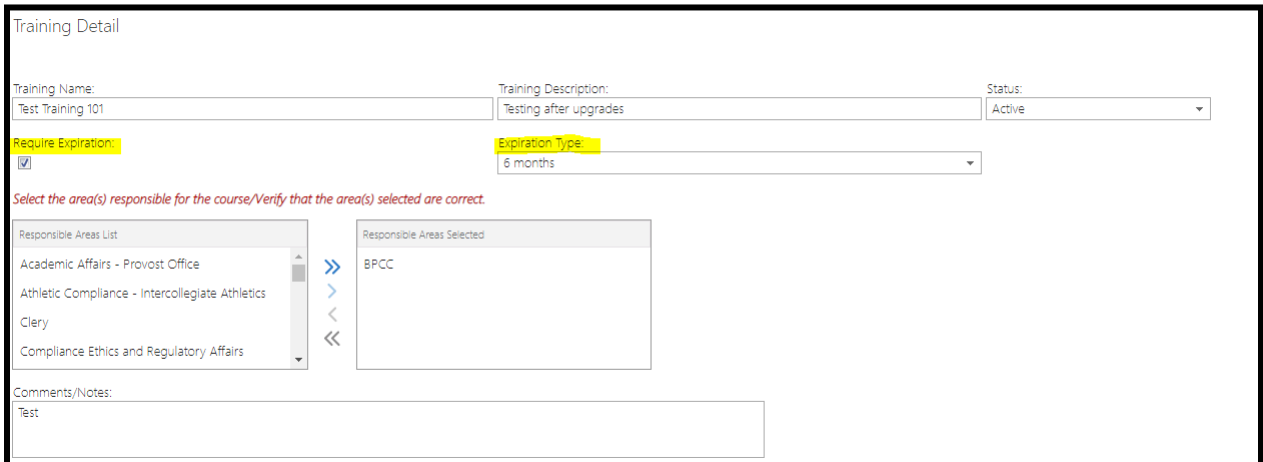
Creating a New Course

To create a new course, click on the "Create New Training Course" button at the top of the training portal main page.

From there, users will be promted to provide a name and description of the training.

There are two fields to the Training Detail screen; a "Require Expiration" checkbox and a "Expiration Type" dropdown. The "Require Expiration" checkbox indicates that this training expires or is reoccurring and when checked will display the "Expiration Type" dropdown, so that you can pick from three expiration values (6 months, 1 Year or 2 years). These fields are not required to be filled in but can be if that information needs to be captured for the training.

Next, select the area(s) responisble for the course by seletcing an area from the "Responsible Area(s) List" and add any comments or notes regarding the training.
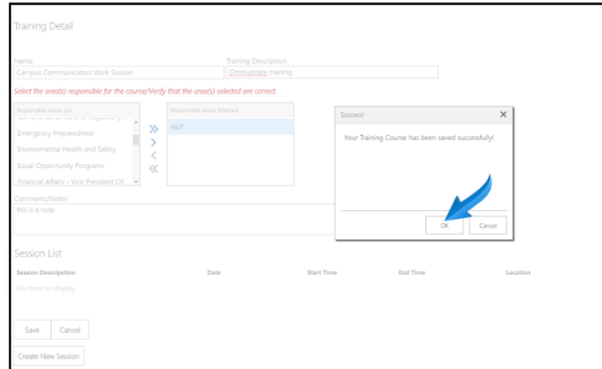
Click on the "Save" button at the bottom of the screen to save the new course.

If all the required fields have been completed, then users will receive a "Success" notification after saving the new course. Click "Ok" to continue"

If users have not completed the required fields, they will be notified of which items need to be completed.


Adding a Session to a New Course

To add a new session to a new course that is being created, click on the "Create a New Session" button at the bottom of the page.
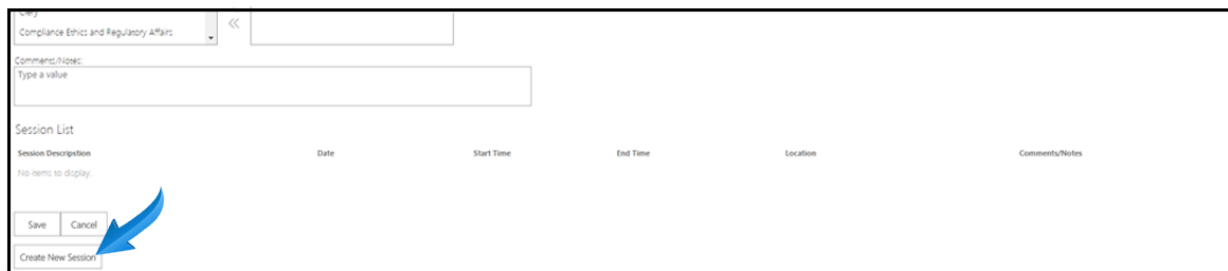
Users will be redirected to a "Session Details" screen where they will first add the session description, session date, session start and end time, location and any comments for the session.

Training Provider:

If the training session is not provided by UA personnel: users should select the appropriate check box for that option and identify who the training provider was in the field provided. *Users should enter the name of the organization or group hosting the training.*
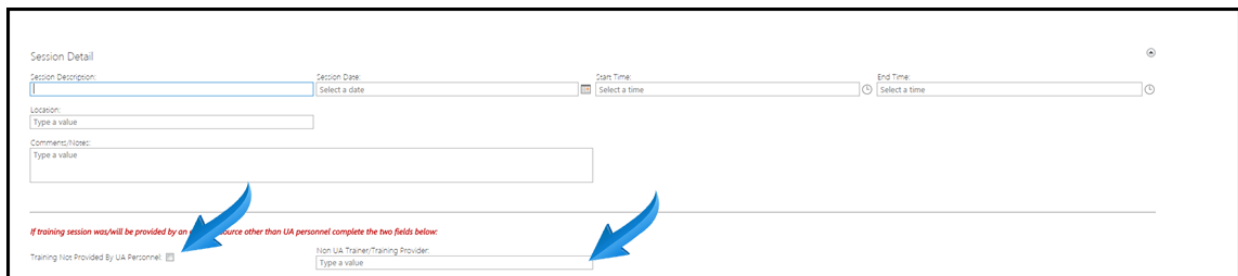

If the training session is provided by UA personnel: users should add the Trainer(s) name by selecting the "Add" button.

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Session Attachments:

Documents related to the session should be uploaded by clicking on the "Add" button under the Session Attachments section of the Sessions Details page. Documents such as training materials, PowerPoint presentation, or handouts related to the session should be uploaded individually.
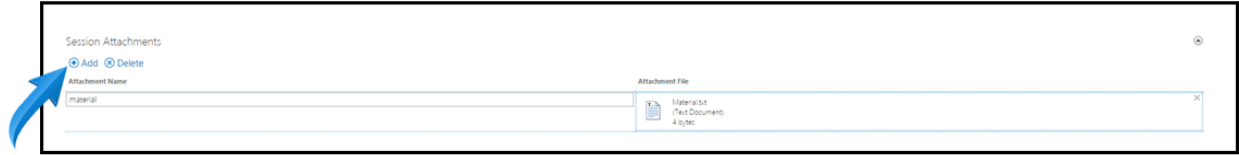
Saving a Session

Once the required information, is added to the Training Details page, click the "Save" button on the bottom of the page to save the session for the selected course.

Adding a Session to an Existing Course Adding Sessions to a Courses

Created by the User:

To add a session to an existing course that was created by the user, click on the course listed on the training portal main page. From there, the user will add a session. *(see instructions for adding a session to a course)*

Adding Sessions to a Courses Created by Others:

To add a session to an existing course that was created by someone else, click on the "Search All Training Courses" button at the top of the Training Portal main page. A search screen will appear where users can search all courses that have been created and documented in the online training portal.

Search by typing the name of the training or type of training in the "Quick Search" field. Results for the search will appear below the search fields. Double click on the training name to open the course and add a new session. *(see instructions for adding a session to a course)*
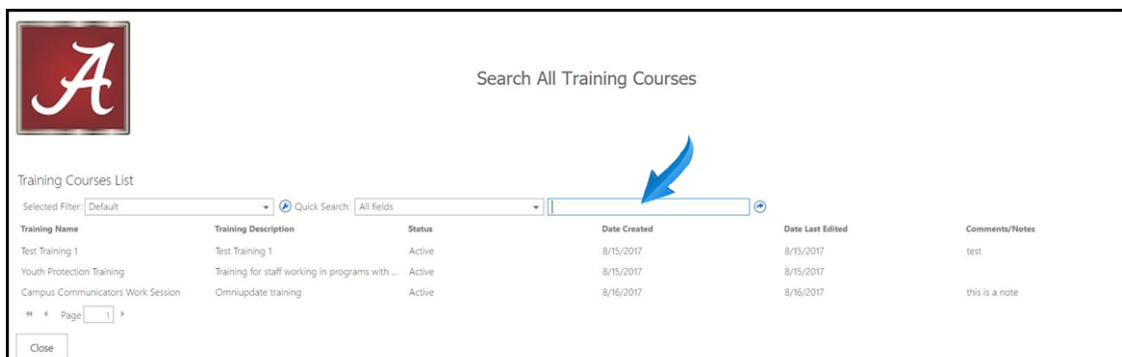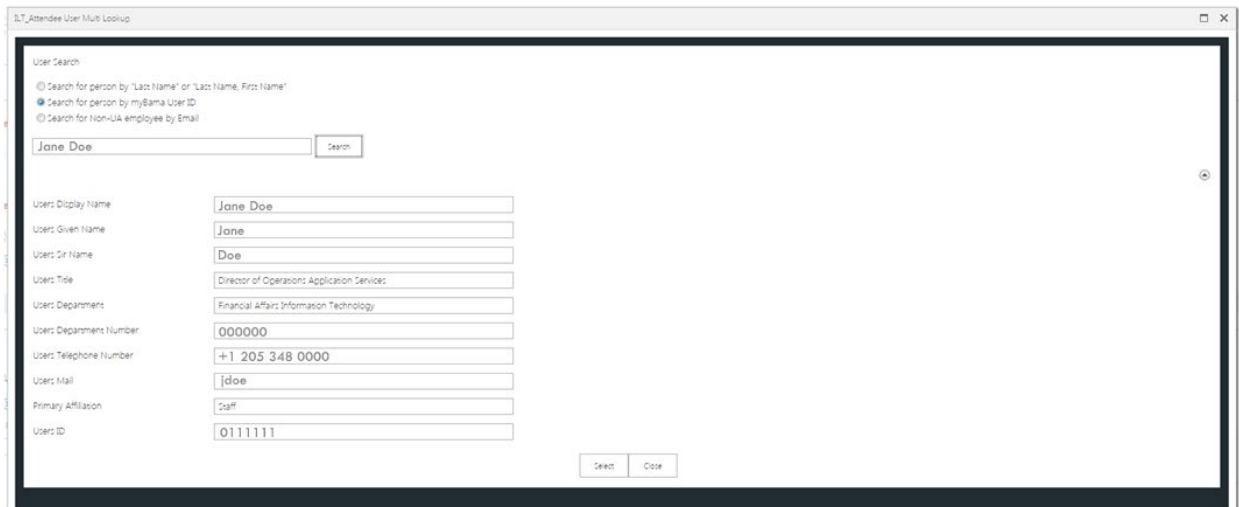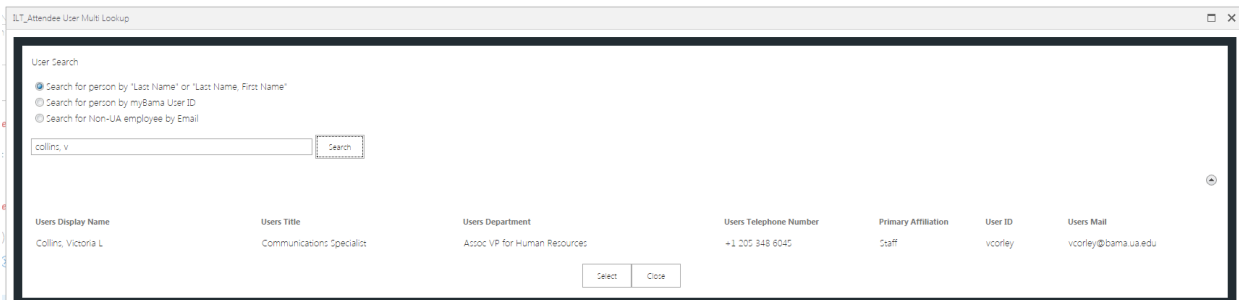
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Adding Attendees to a Session

Adding Attendees Manually:

Attendees can be added to the session individually by clicking the "Add" button under the Attendees section of the Sessions Details page.


Users will see a User Search pop-up box where they can search for attendees that are UA employees by last name or myBama User ID. A search can also be conducted for non-UA employees (using their email address) who have previously been entered into the system.

If results from the search are correct, click on the "select" button at the bottom of the page.

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Users will receive a pop-up message if there are no matching records for a name entered in the user search. Click "ok" and add the individual using their email address, first and last name.
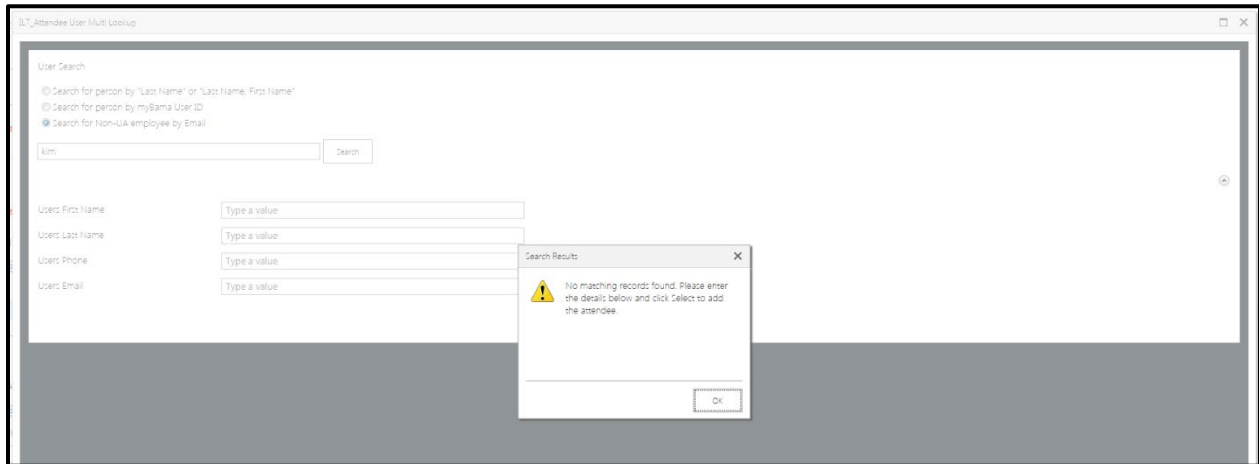
Once the correct attendee is selected, click the "Save" button at the bottom of the page. Users will be redirected back to the Training Details page where they will see the list of attendees added under the "Attendees" session of the page.

(The CWID field is not pulled back during the lookup process and must be manually added by the user if they require it. This is not a required field for the form and doesn't need to be used if the user doesn't want to capture that information)

Adding Attendees using eSign In:

Rather than adding attendees to a session manually after a training session, instructors can use the electronic sign in form to allow attendees to sign in electronically while attending the session. To access the electronic sign in form, instructors should go to the main training portal page using a computer or mobile device, and click on the session being hosted to open the Session Details page.
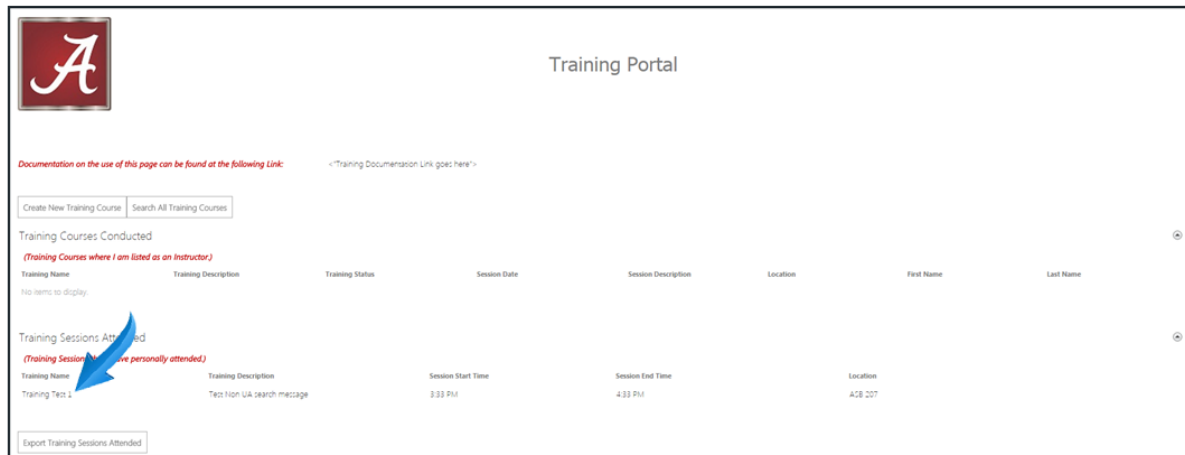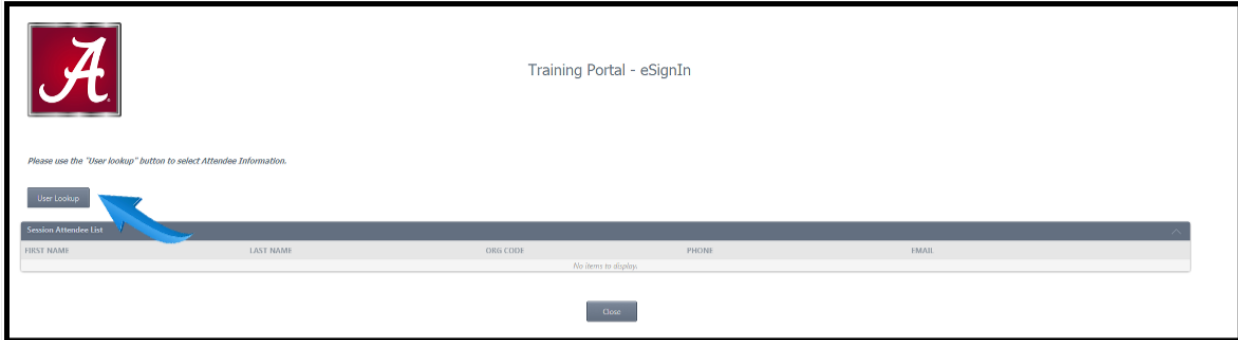
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From the Sessions Detail page, click on the "Electronic Sign In Form" button at the bottom of the page.

Attendees should enter their information in the fields provided on the eSign in page then click the "User Lookup" button to lookup their information.

Click "SignIn" after completing the user lookup to add the attendees name to the "Session Attendee List."