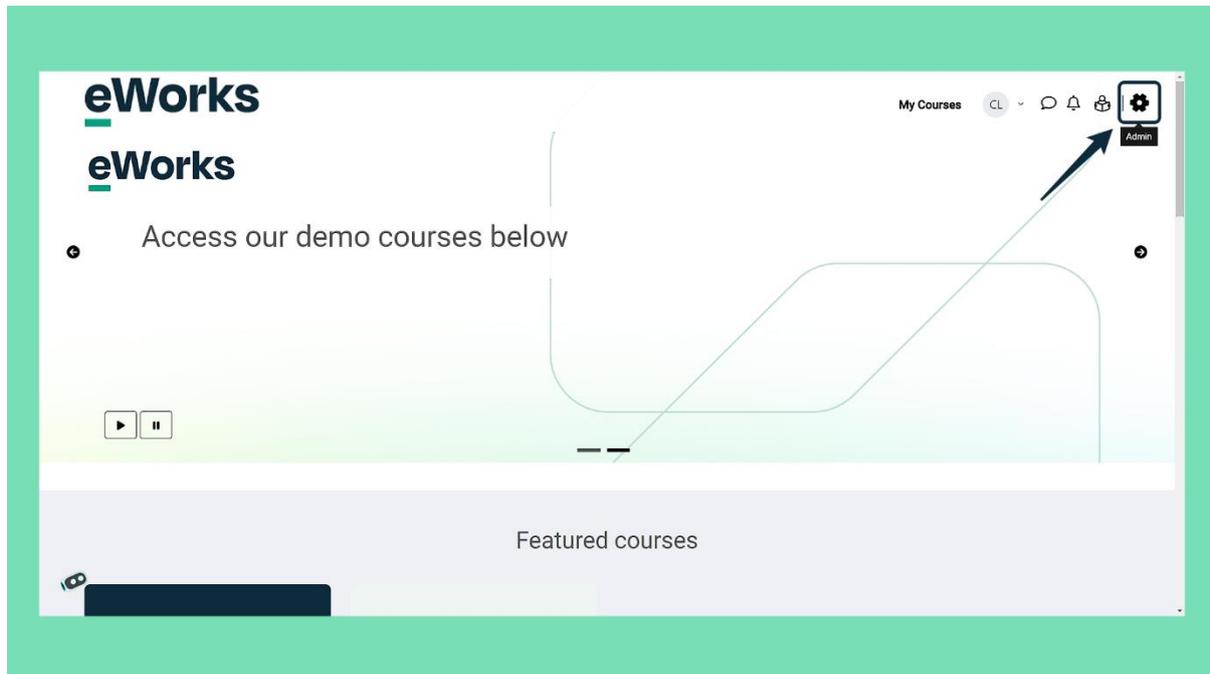


Certifications Set up

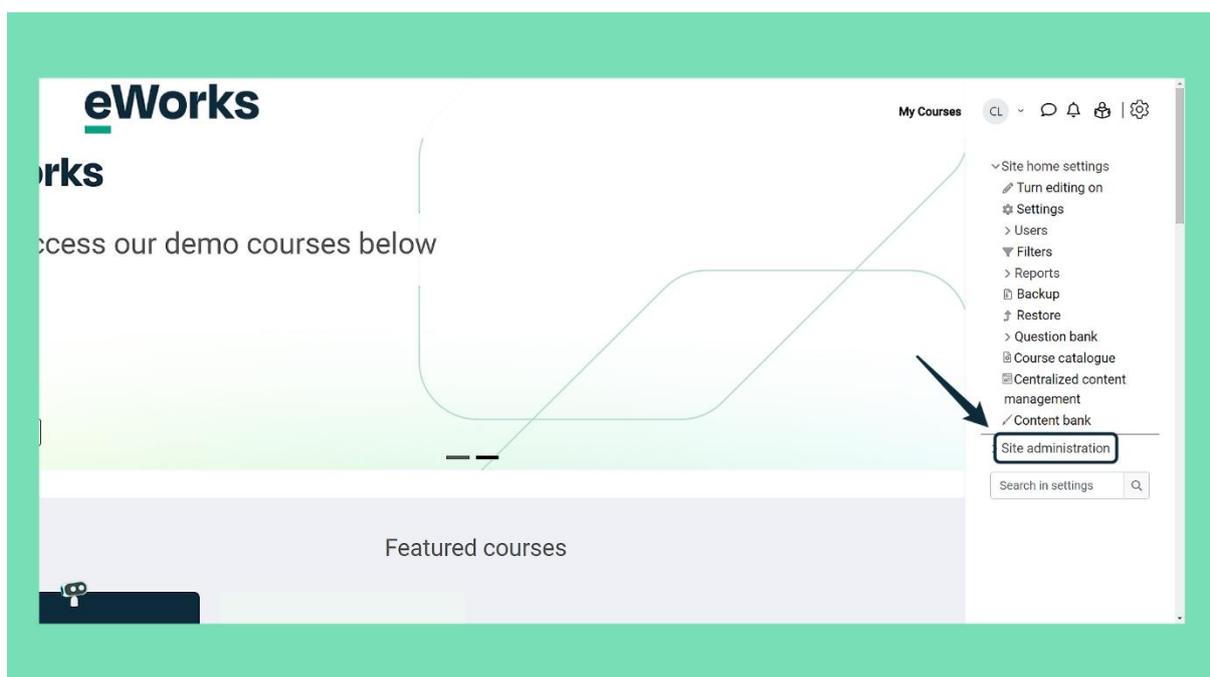
1. Setting up Certifications

Welcome to the second video on setting up Programs and Certifications. If you haven't set up a Program yet, please refer back to the first video before watching this one. To set up certifications, we will start by going to the Admin Cog.



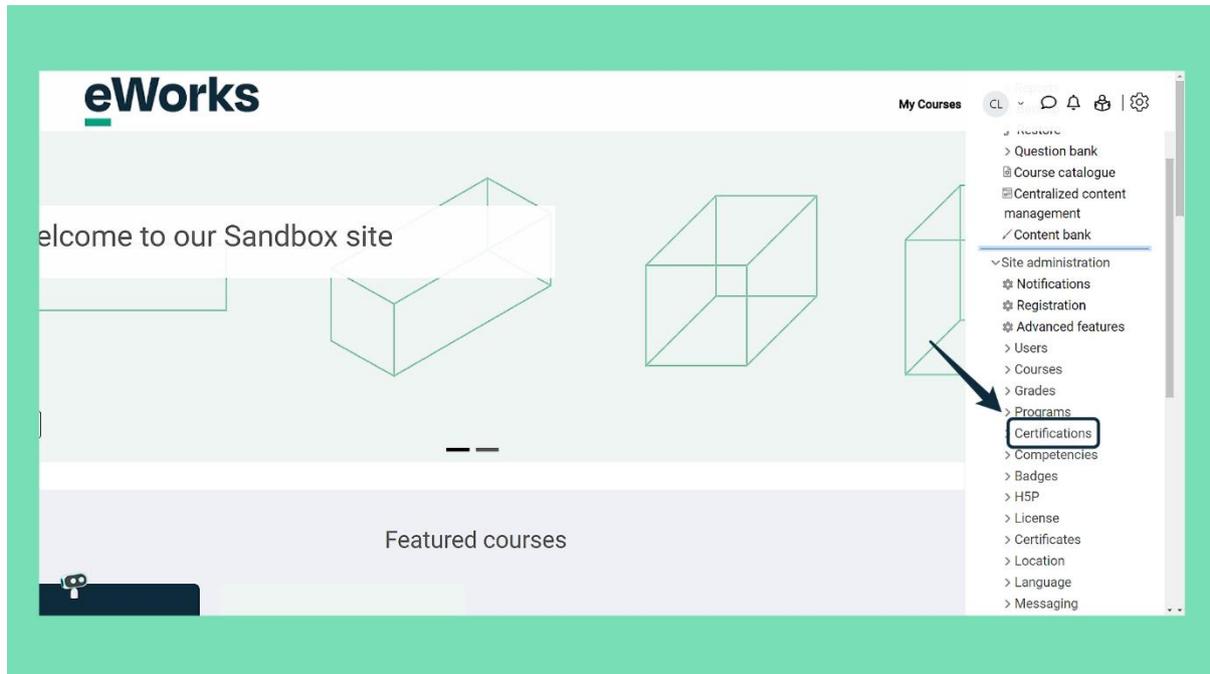
2. Site Administration

Select 'Site administration'.



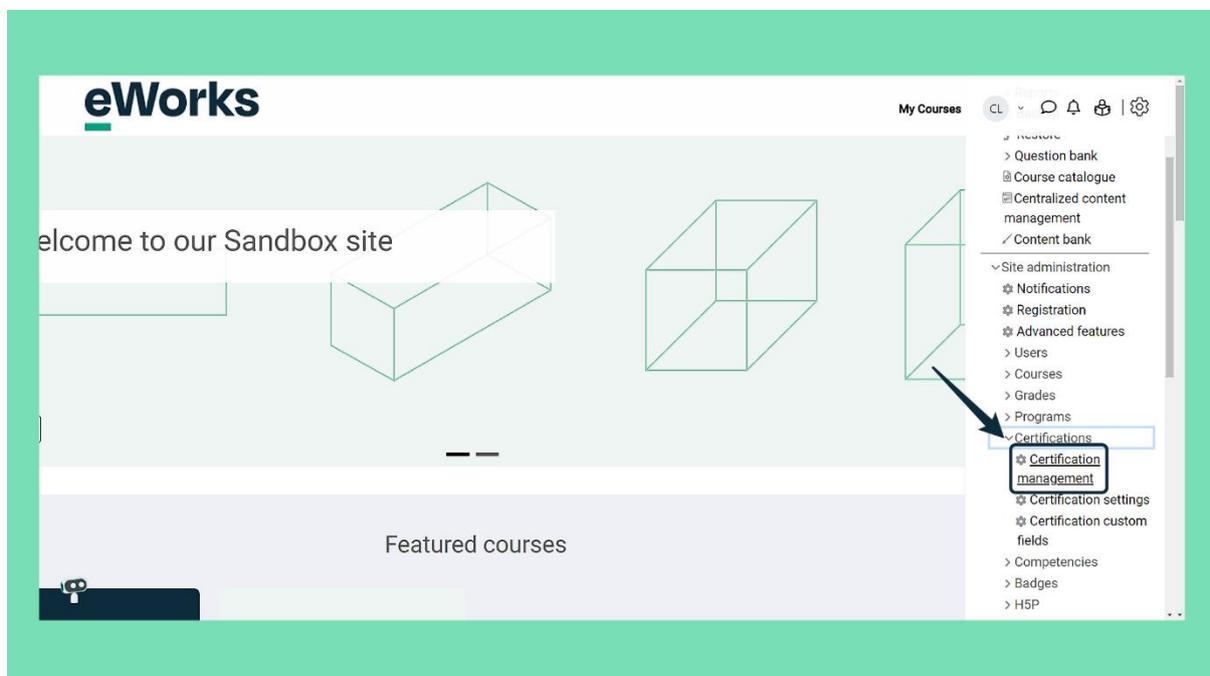
3. Certifications Menu

Select the 'Certifications' option.



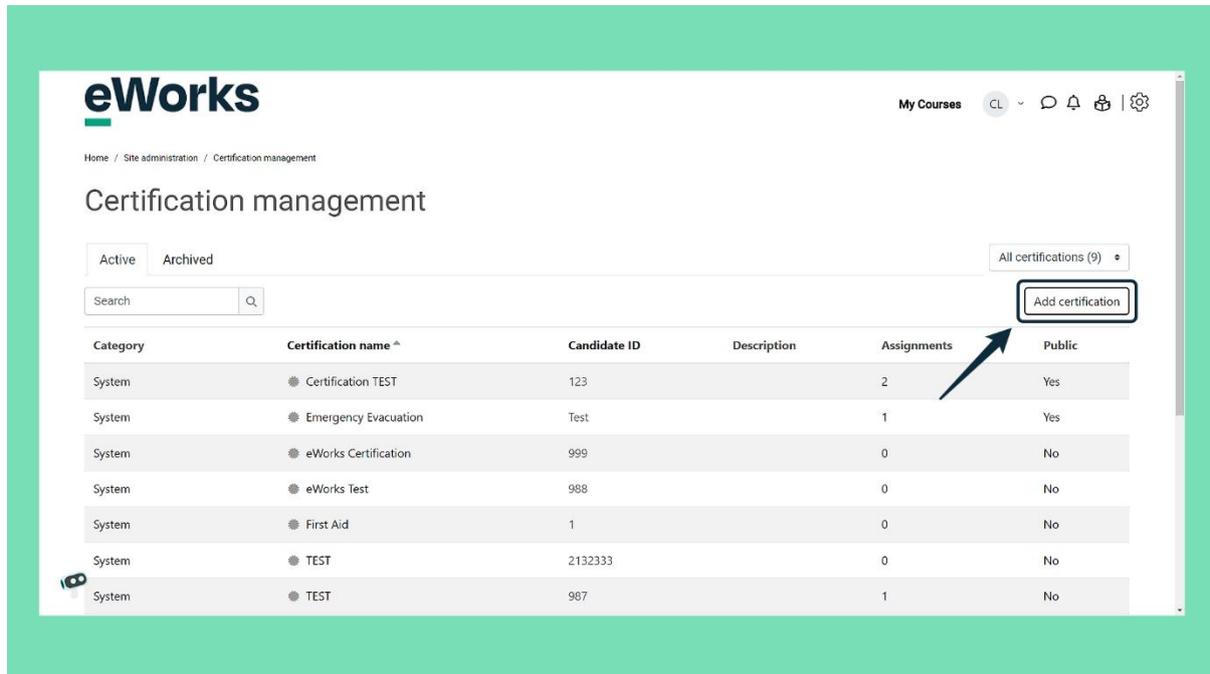
4. Certification Management

Click on Certification Management.



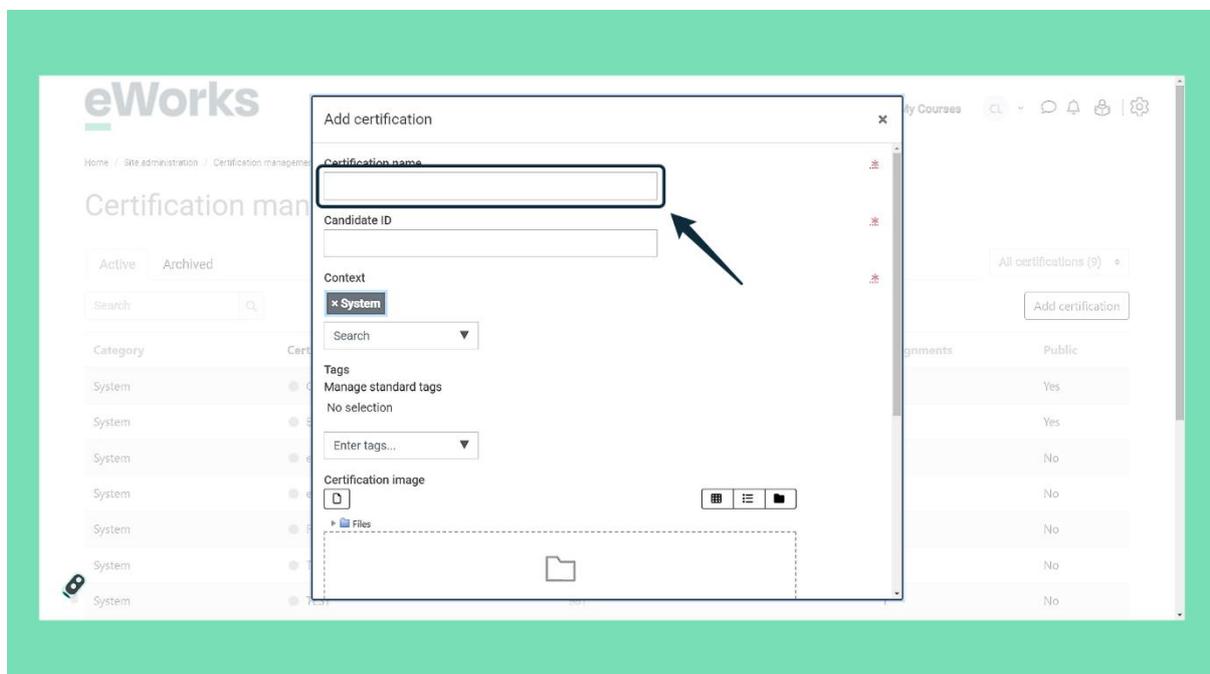
5. Add a new Certification

Click on add certification.



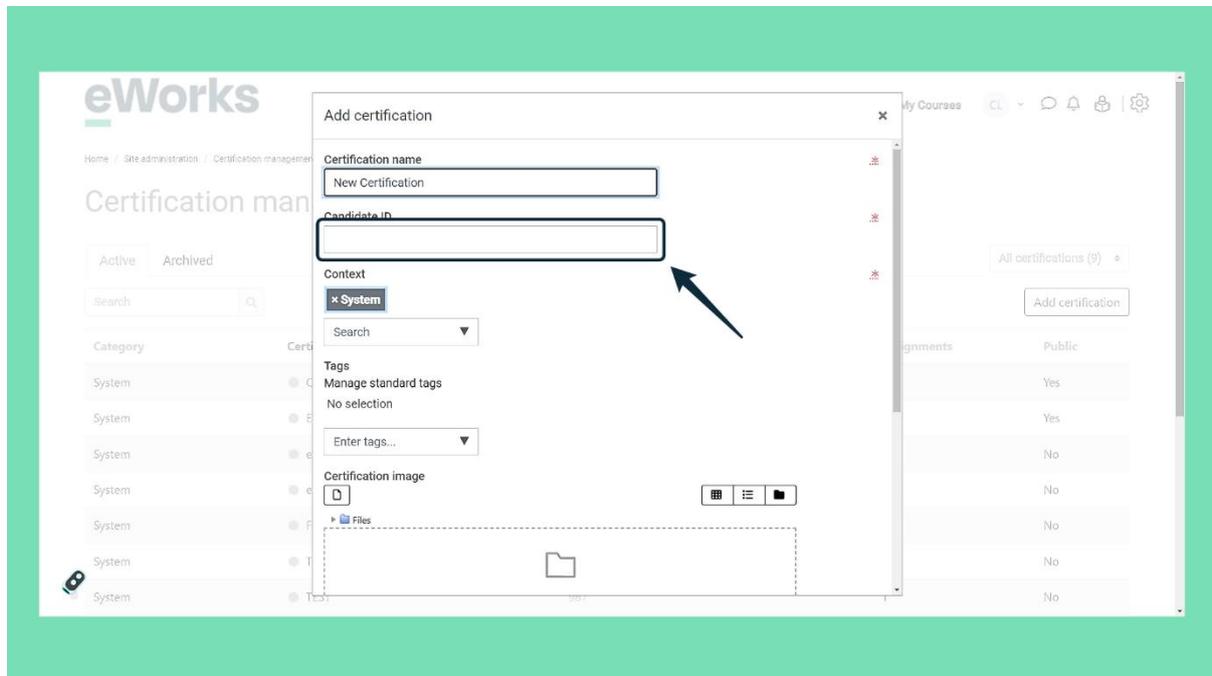
6. Certification Name Field

Enter the name of the certification in the designated field.



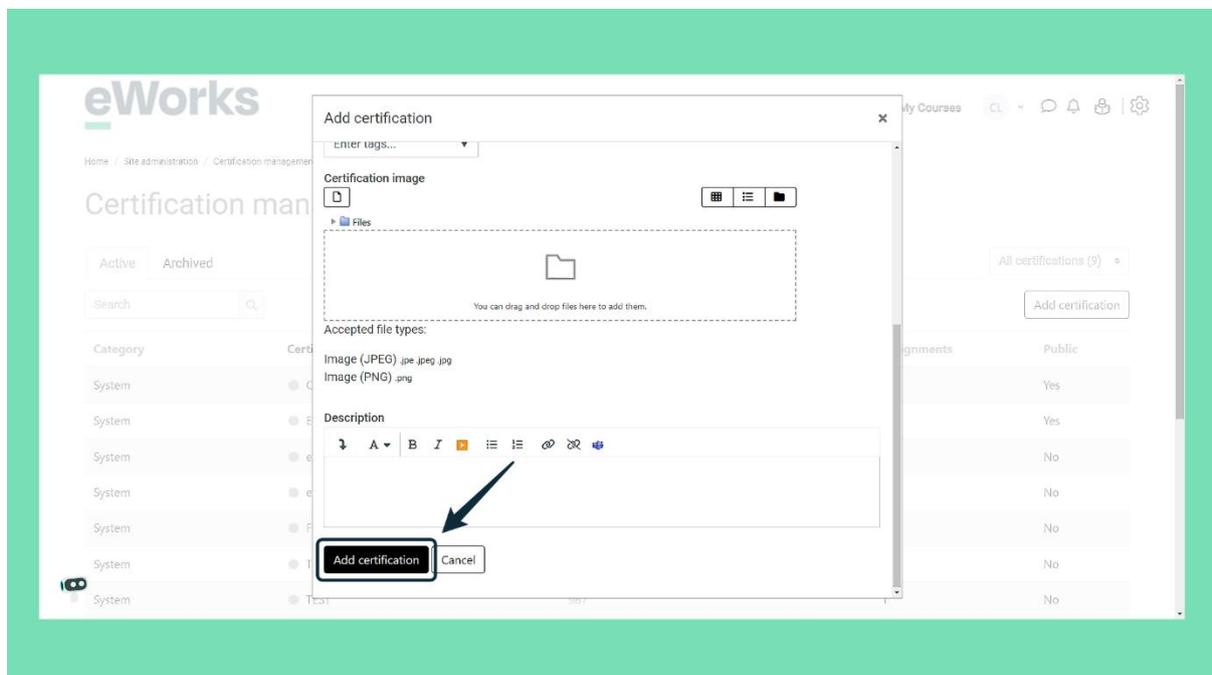
7. Certification settings

These are similar settings to the Program set-up. You can use the same ID as your program if you like.



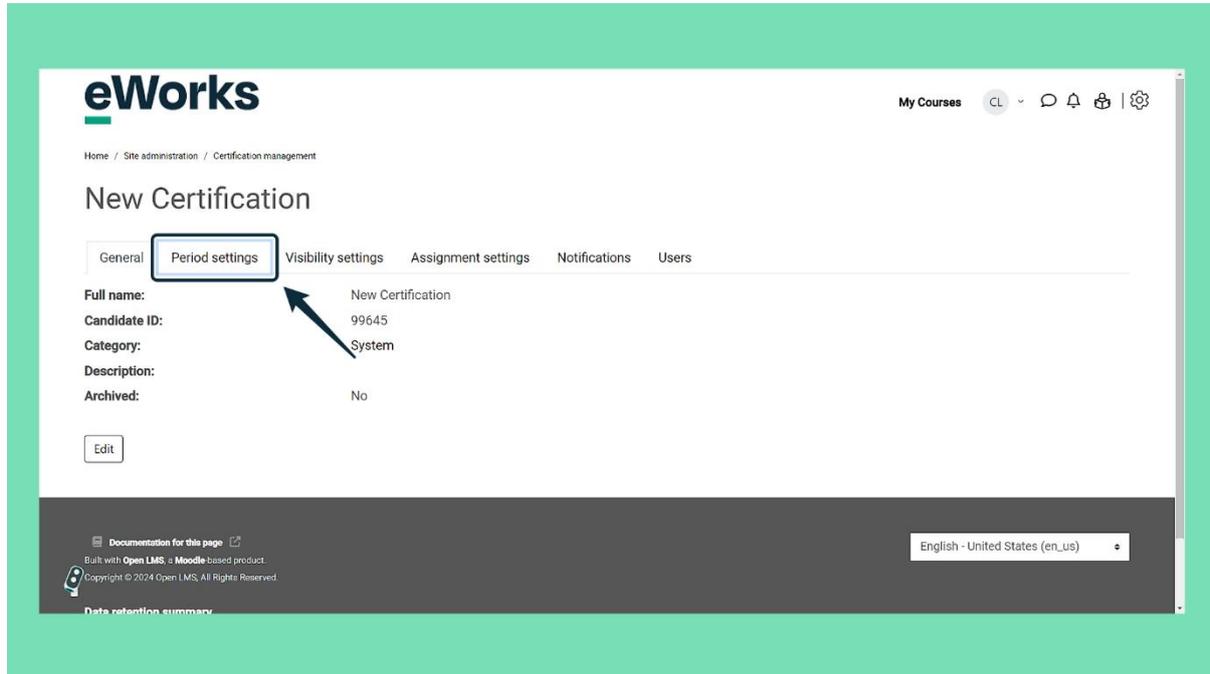
8. Add Certification Button

Once you're done, click on "Add Certification."



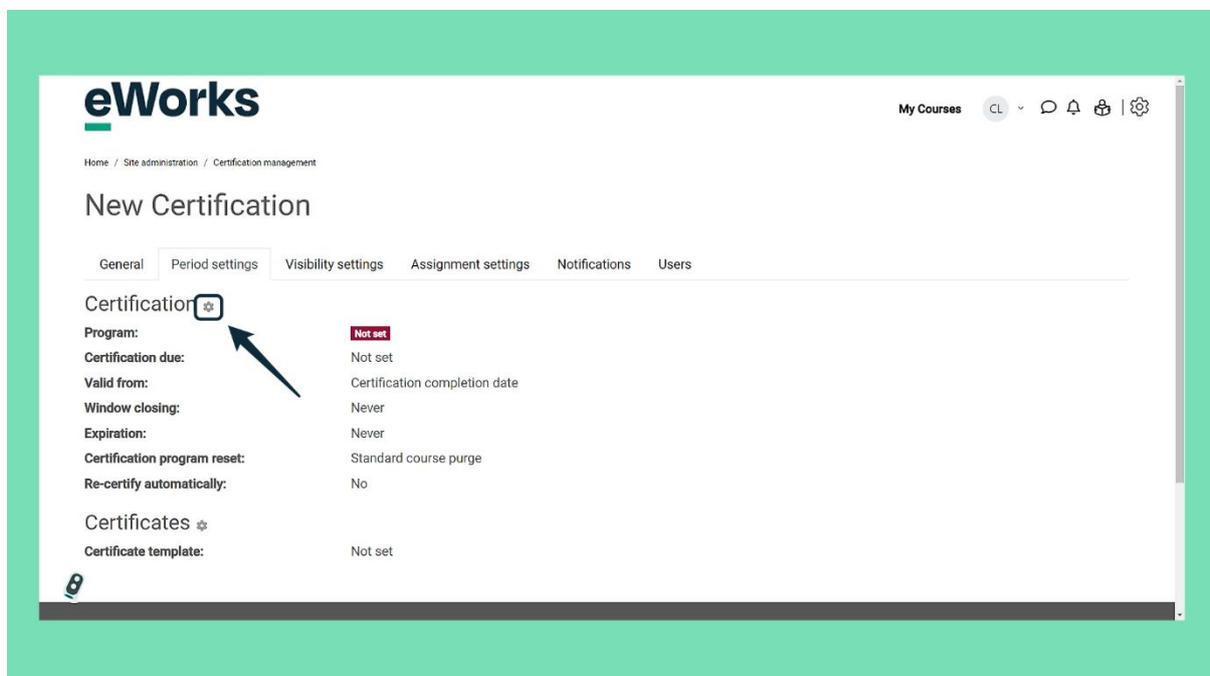
9. Period Settings Tab

Click on the period settings tab to set up certification windows.



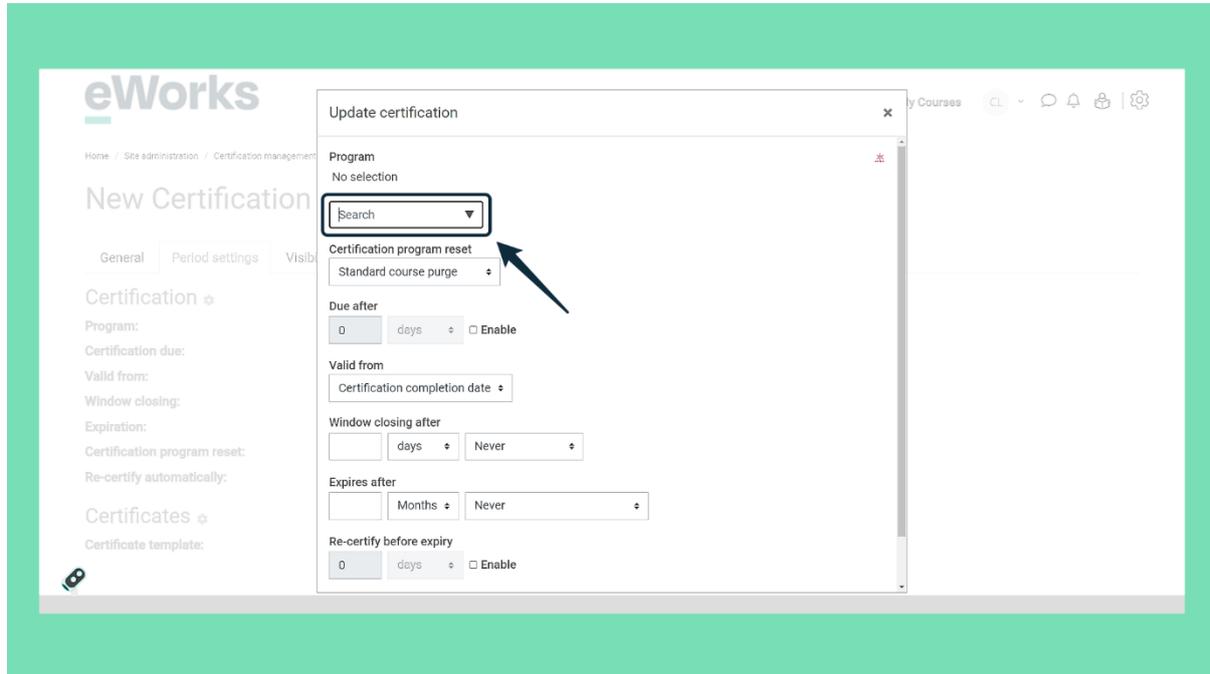
10. Certification Settings

Click on the certification settings cog.



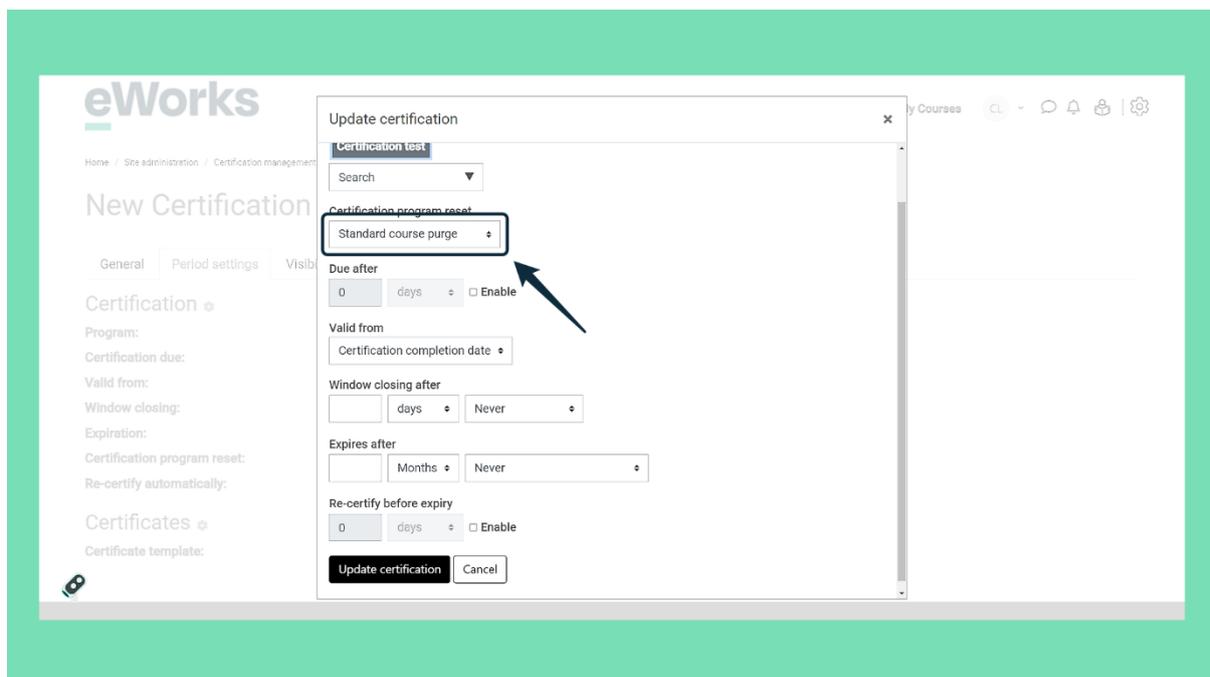
11. Program Selection Field

Choose the program you'd like to connect this certification with.



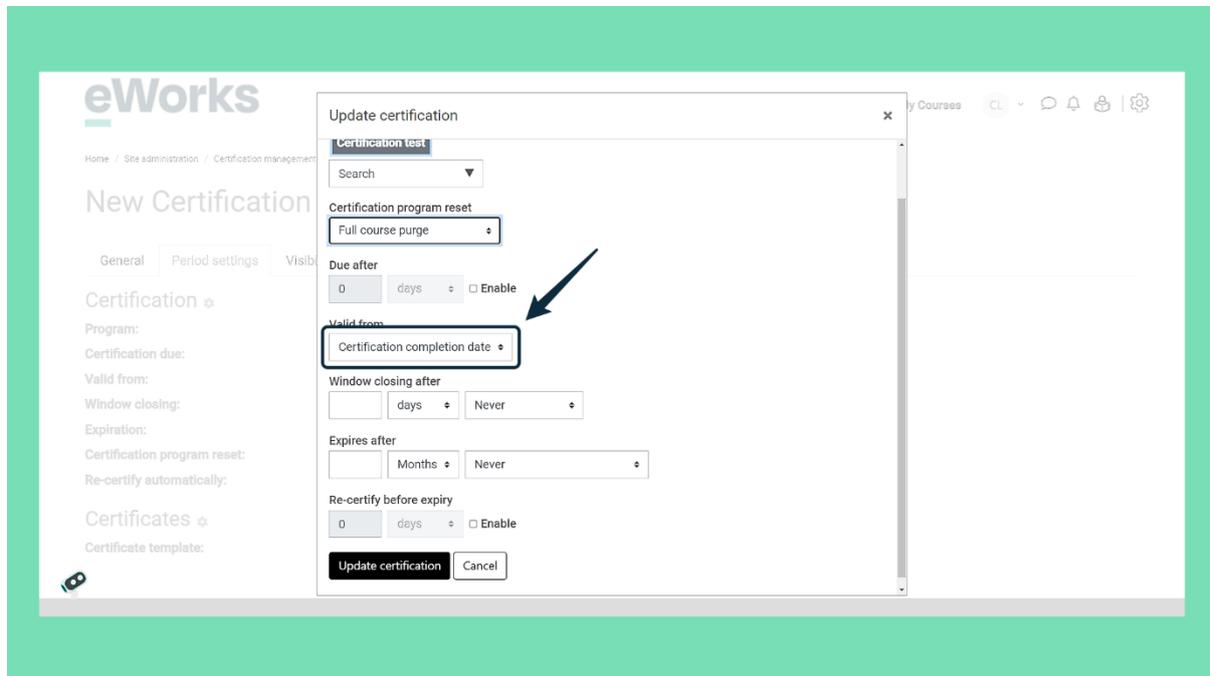
12. Certification Program Reset

Select the certification program reset option. We would recommend using the "full course purge" to ensure that all user completion data is removed once the certification has expired.



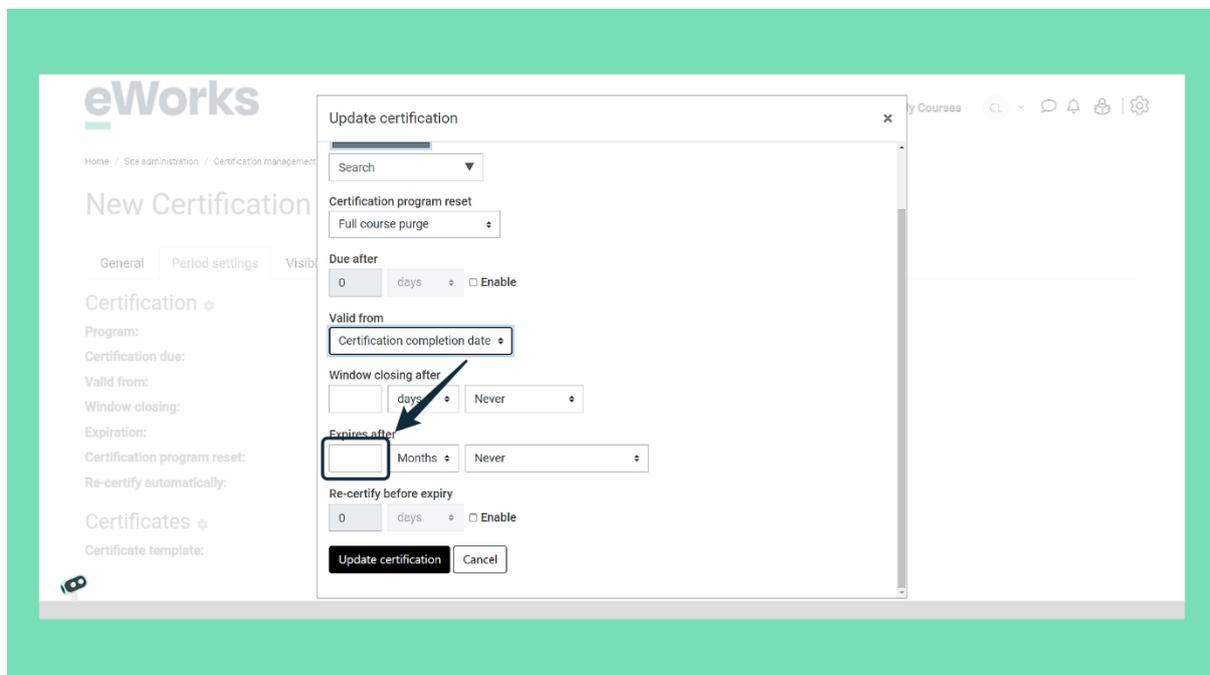
13. Certification Date

Choose the date from which the certification will be considered valid. In this example, we will use the date that a user has completed the certification.



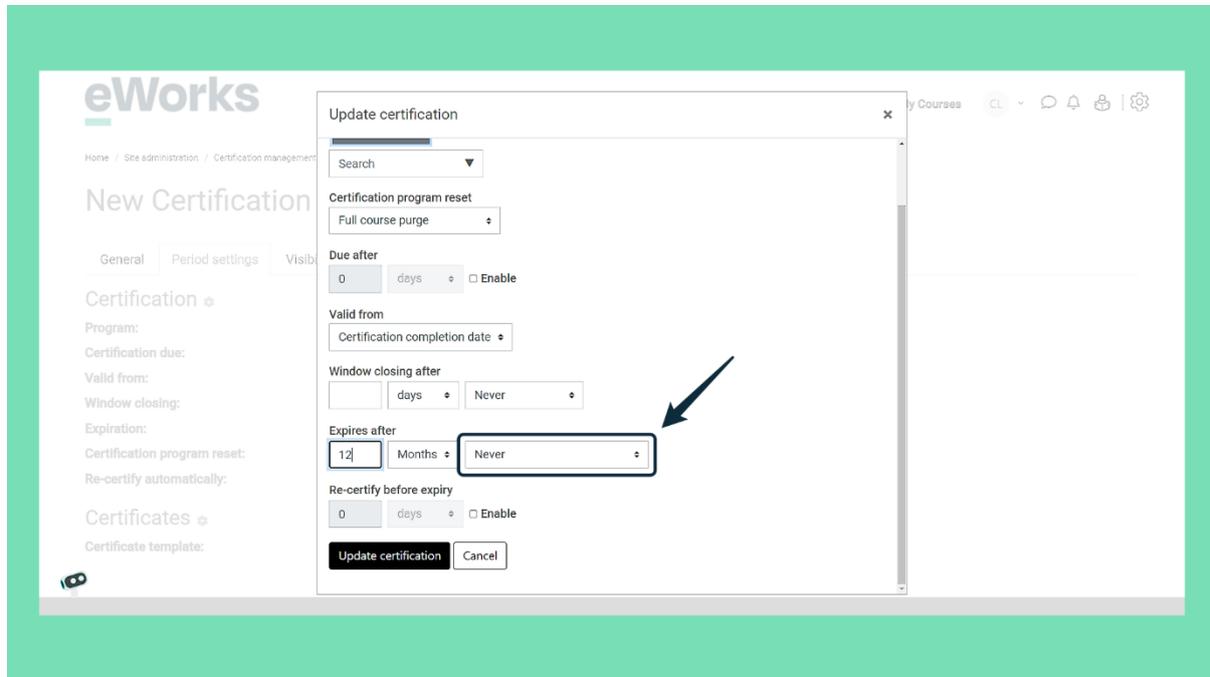
14. Set Expiration Time

Enter the duration for when the certification should expire.



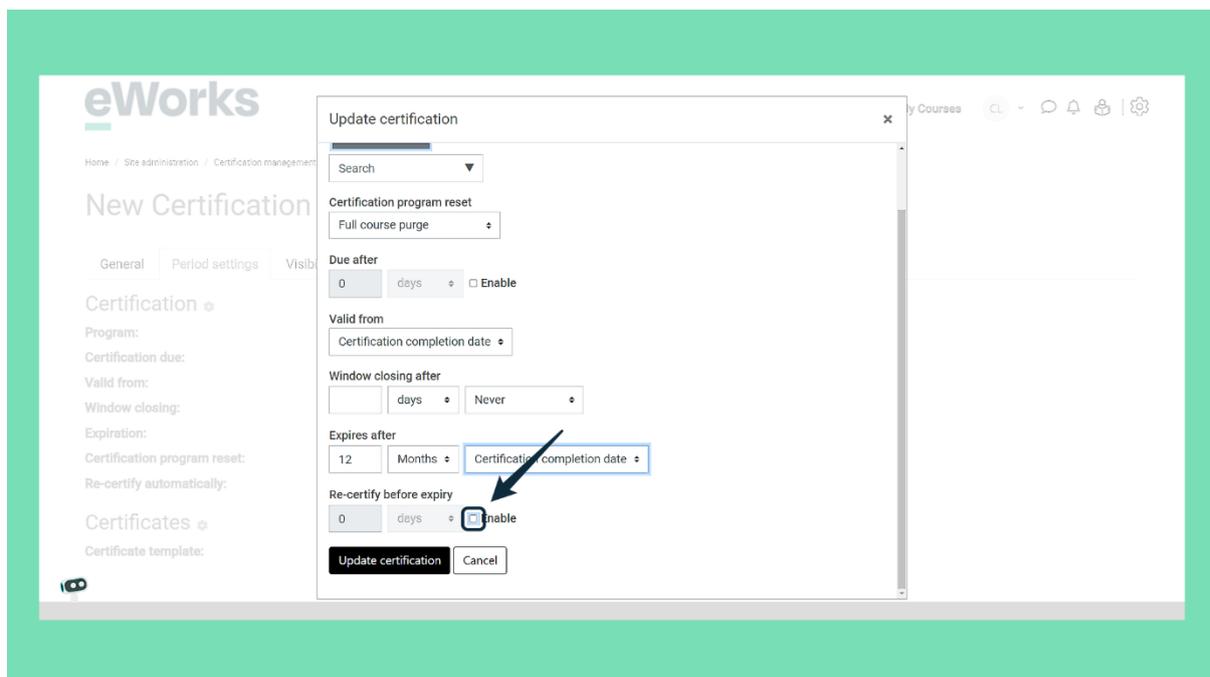
15. Expiry Setting

In the dropdown box, you can choose the basis for the expiry date calculation. In this example, we've set the course to expire 12 months after the user completes the certification.



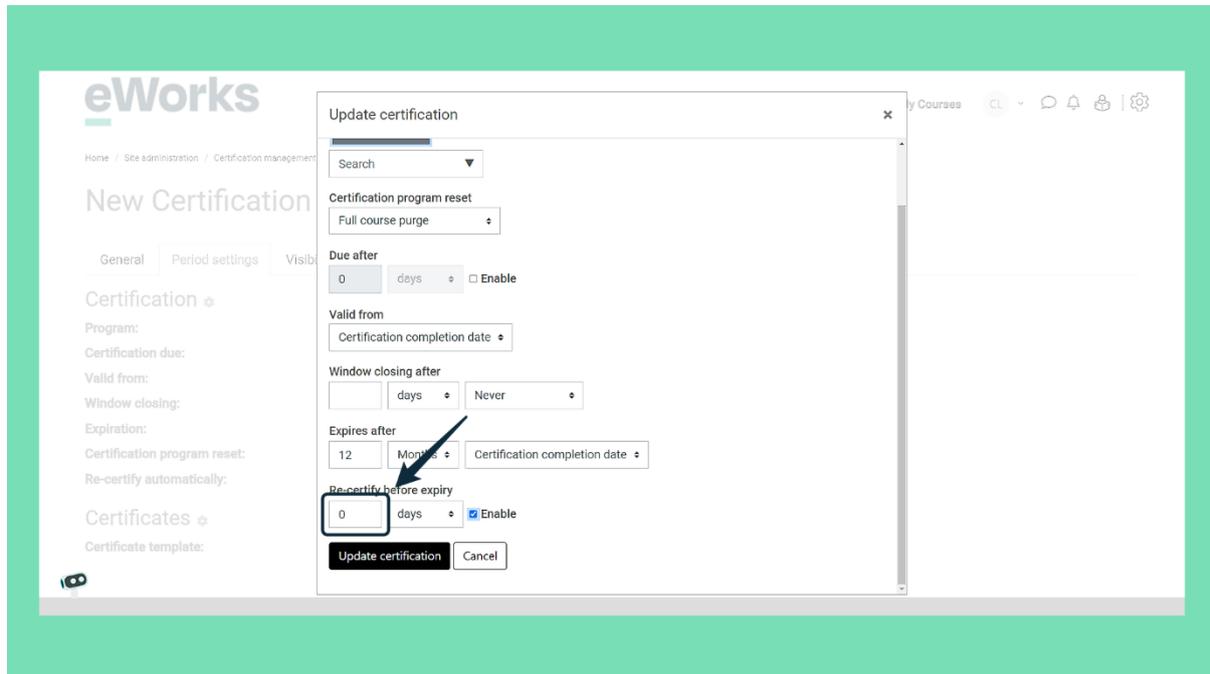
16. Enable Re-certification

Select this checkbox to activate the re-certification process.



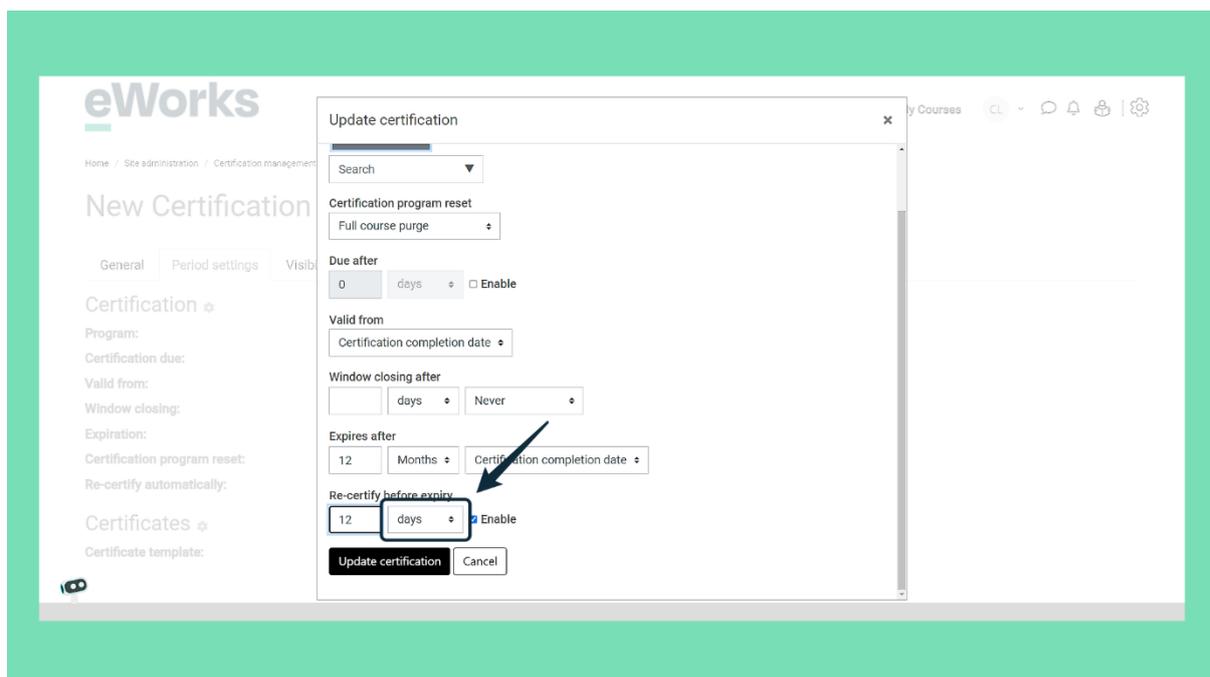
17. Re-certification Before Expiry Setting

Enter the number of days before expiry to initiate the re-certification process.



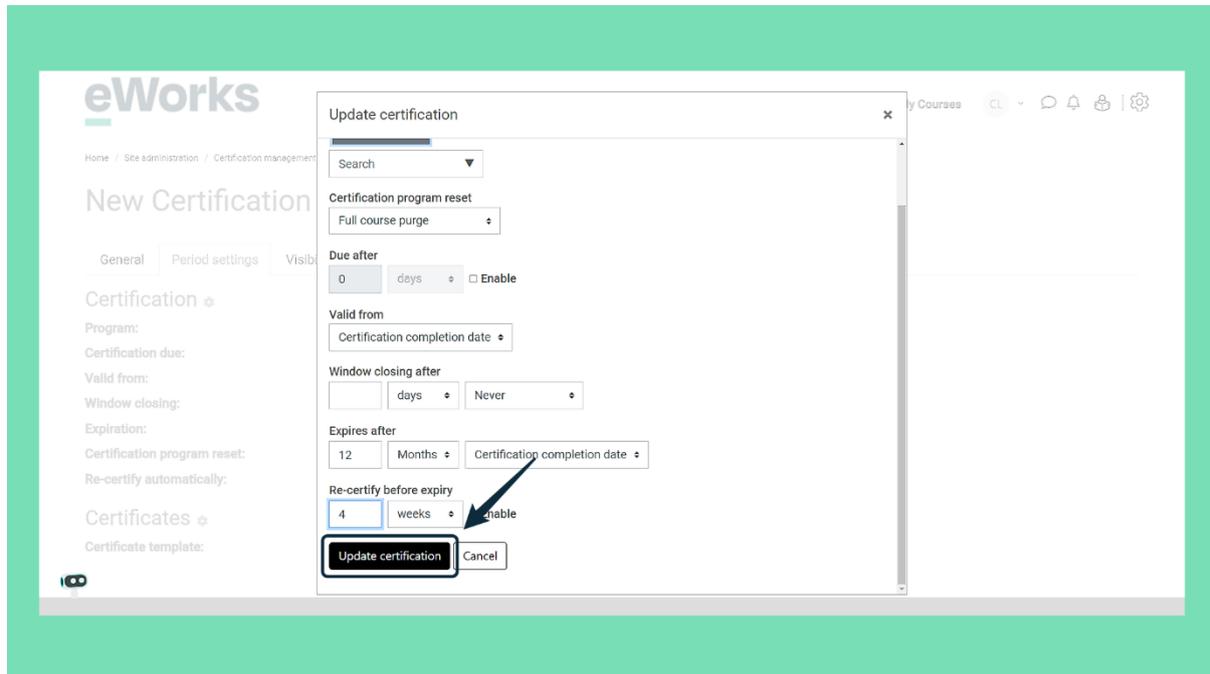
18. Re-certification Before Expiry

Select the time frame for re-certification before the current certification expires. In this example, we'll choose to make re-certification available 4 weeks before the certification's expiry. So, if a user completes the certification in January, it will expire the following January, but they can start re-certifying in December.



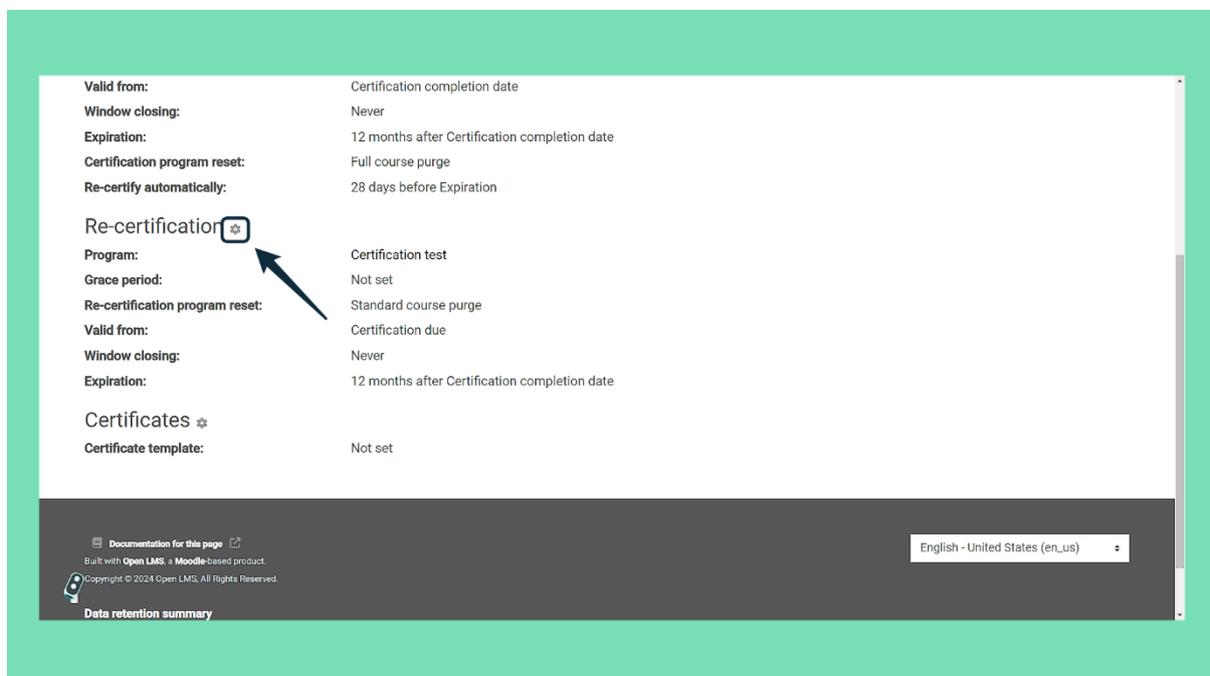
19. Certification Update

Click on "Update Certification" when you're ready.



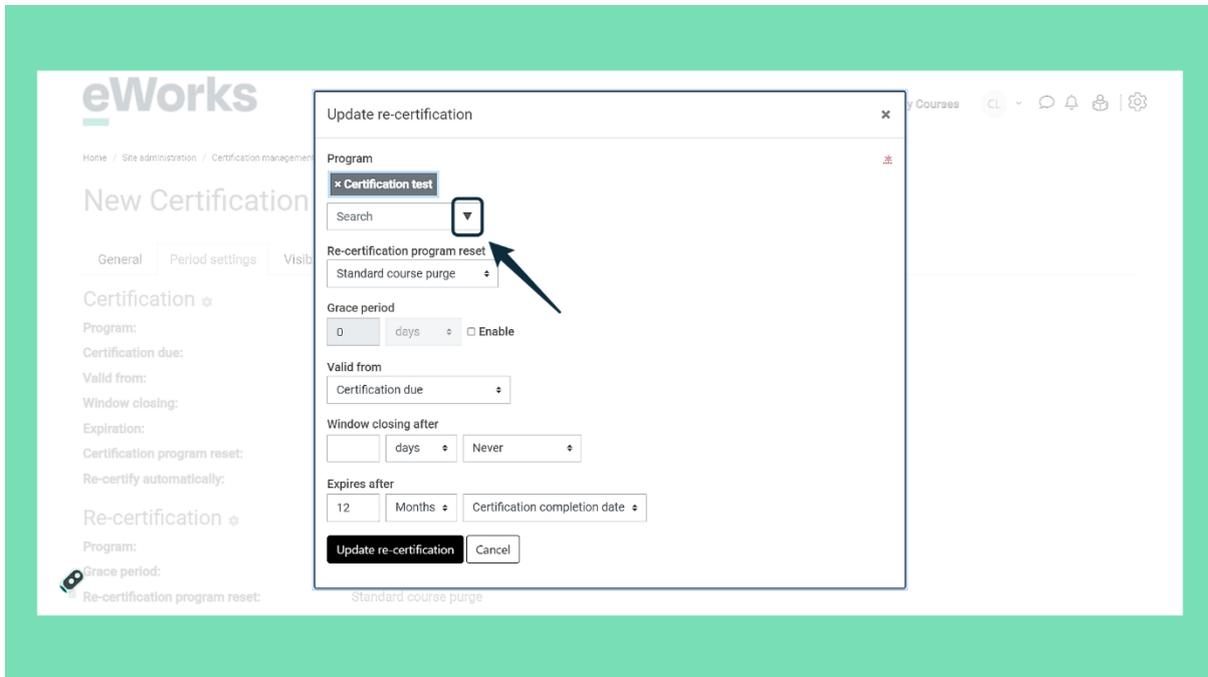
20. Re-certification Settings

Click the gear settings icon to access the re-certification settings.



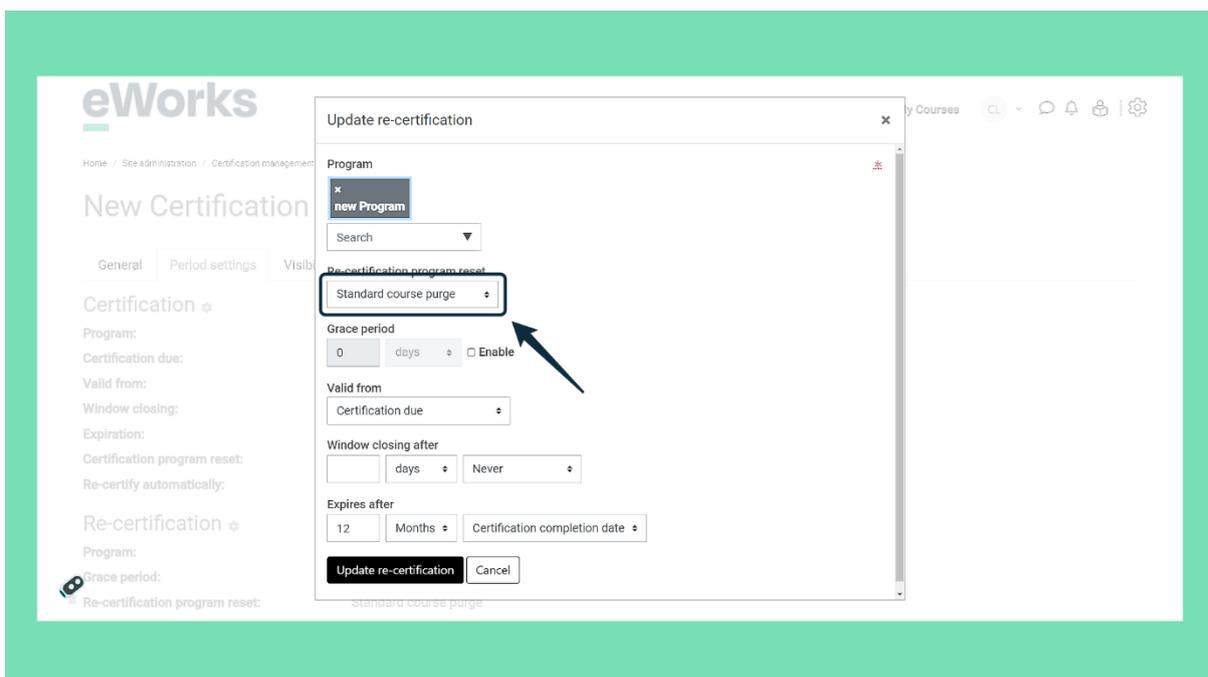
21. Program Selection

This option allows you to select the course a user will complete for re-certification. If you're opting for a different course, like a refresher, you can pick it here. Alternatively, if the user is retaking the same course, simply re-select it here.



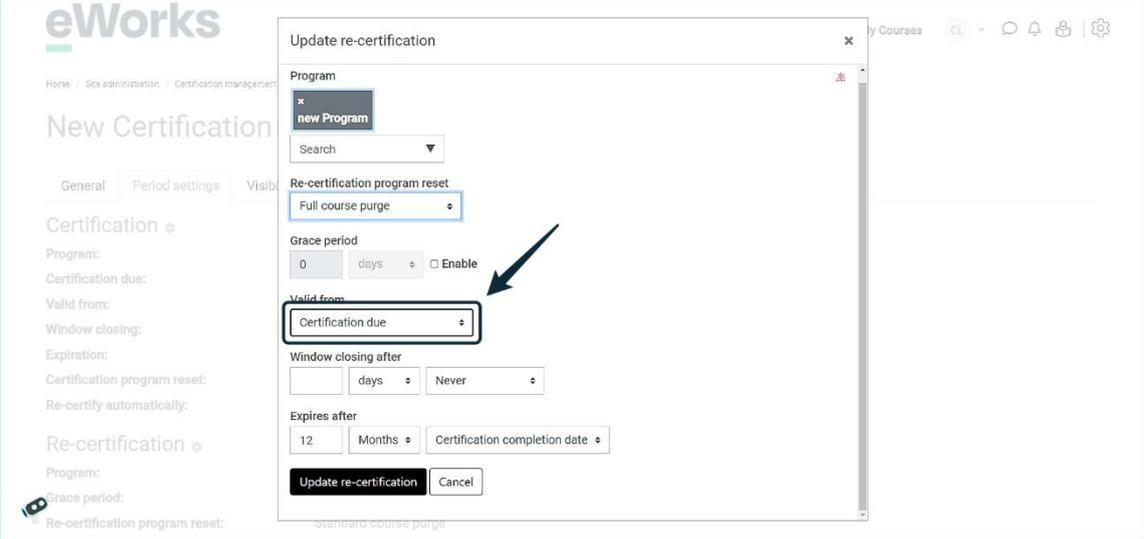
22. Course Purge Selection

Select the preferred re-certification program reset. Once again, we would recommend using "full course purge".



23. Certification Due Selection

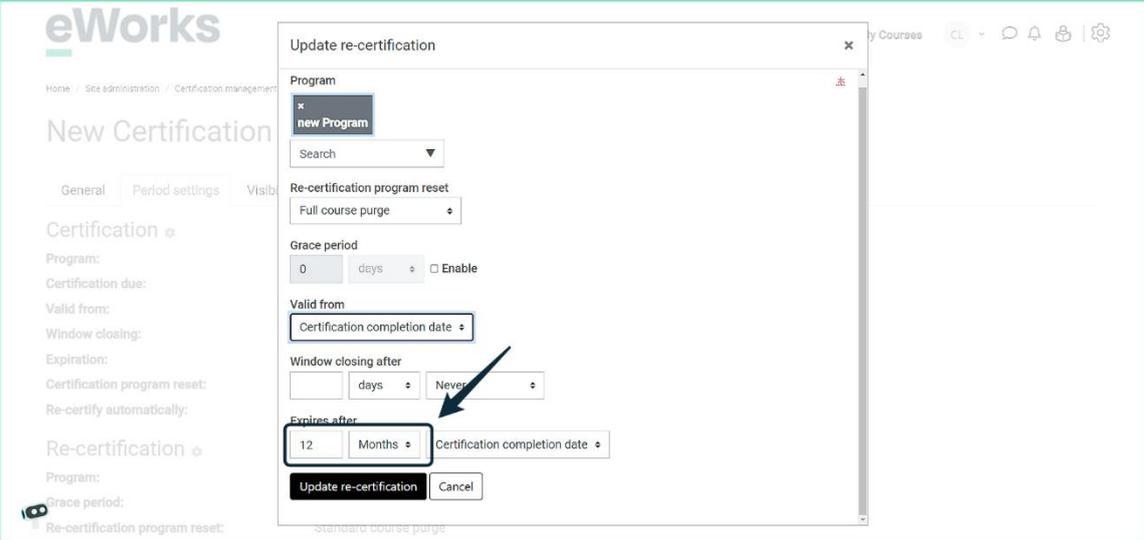
Select the due date for the certification to be valid from.



The screenshot shows the 'Update re-certification' dialog box in the eWorks interface. The 'Valid from' dropdown menu is highlighted with a red box, and a red arrow points to it, indicating that 'Certification due' is the selected option. Other visible options in the dropdown include 'Certification completion date'. The dialog also shows fields for 'Program', 'Re-certification program reset', 'Grace period', 'Window closing after', and 'Expires after'.

24. Expiration Setting for Certification

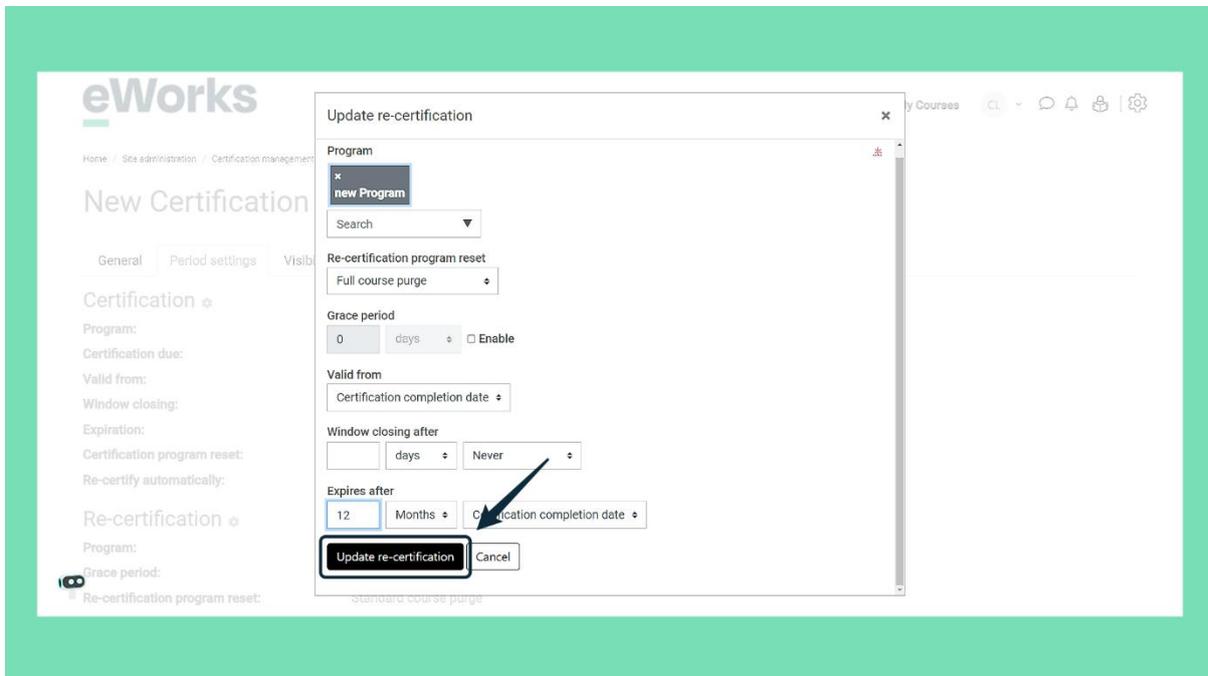
Specify the duration after which the certification expires.



The screenshot shows the 'Update re-certification' dialog box in the eWorks interface. The 'Expires after' dropdown menu is highlighted with a red box, and a red arrow points to it, indicating that '12 Months' is the selected option. Other visible options in the dropdown include 'Certification completion date'. The dialog also shows fields for 'Program', 'Re-certification program reset', 'Grace period', 'Valid from', and 'Window closing after'.

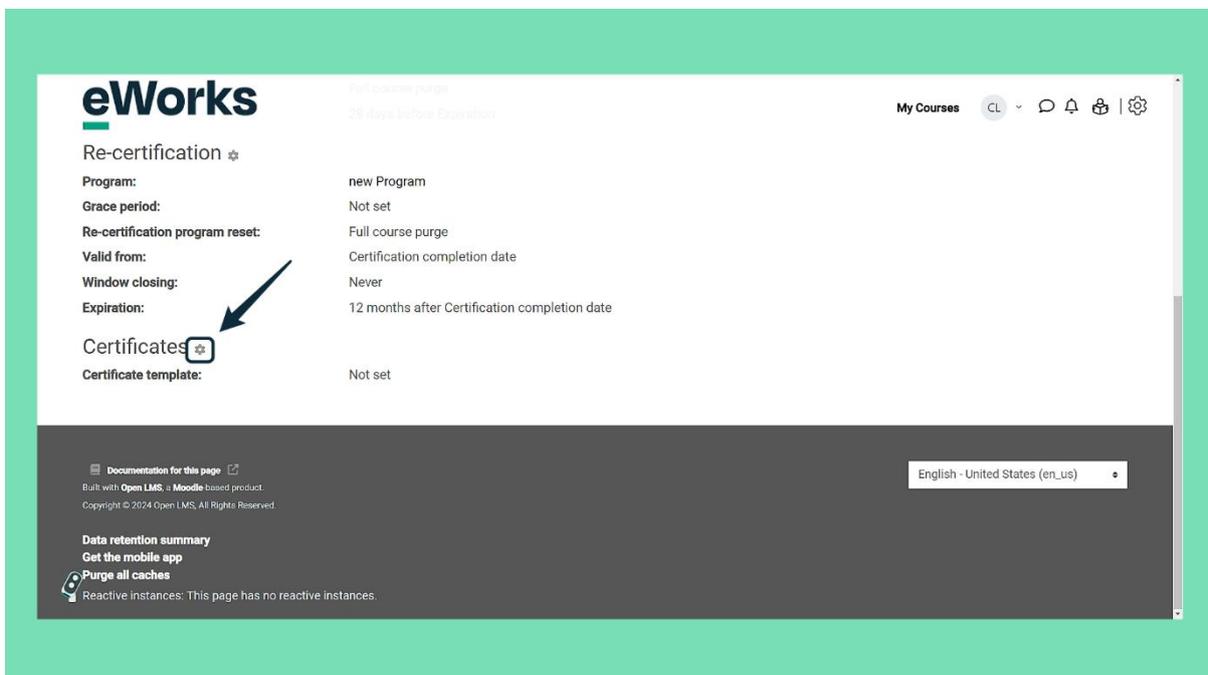
25. Update Re-certification

Click to confirm changes to the re-certification settings. This will now create an ongoing certification process based on these settings.



26. Certificate Settings

Click on the certificate settings cog to set up a certificate for the re-certification.



27. Visibility Settings Tab

Select the visibility settings tab to adjust who can view this certification. This is the same settings as the Program set up.

The screenshot shows the 'New Certification' page in the eWorks interface. The 'Visibility settings' tab is selected and highlighted with a red box. An arrow points to the 'Certification test' field in the 'Certification' section.

Section	Field	Value
Certification	Program:	Certification test
	Certification due:	Not set
	Valid from:	Certification completion date
	Window closing:	Never
	Expiration:	12 months after Certification completion date
	Certification program reset:	Full course purge
Re-certification	Program:	new Program
	Grace period:	Not set
	Re-certification program reset:	Full course purge

28. Assignment Settings Tab

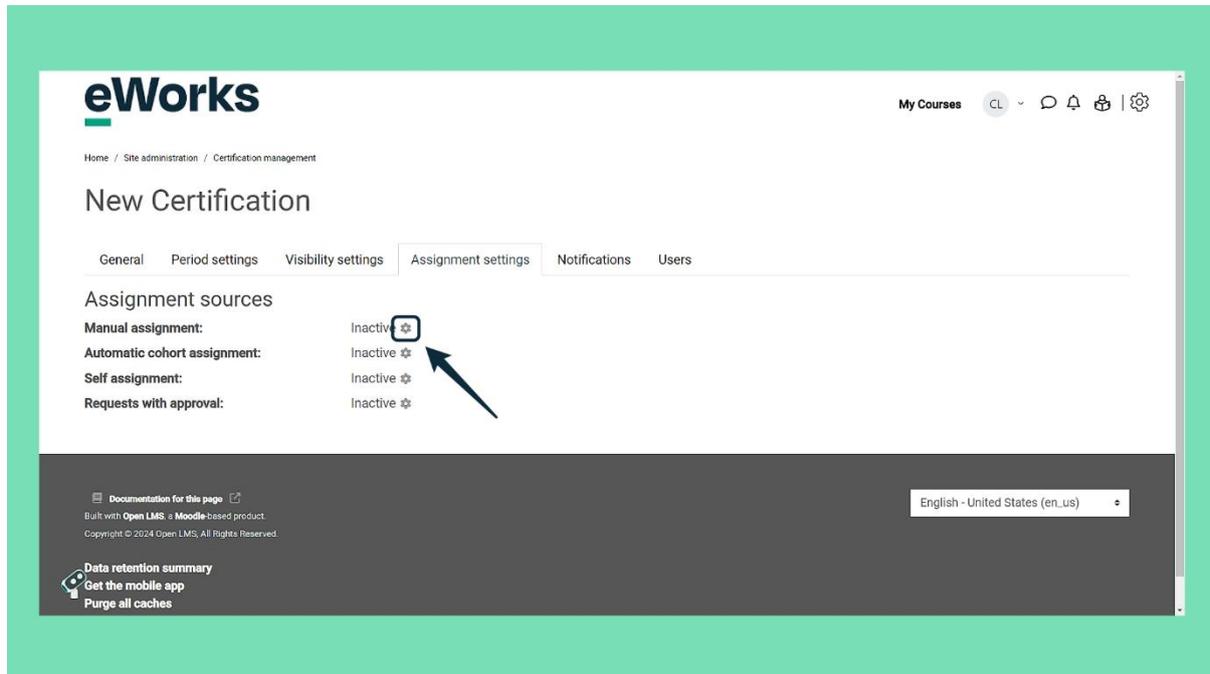
To adjust how users enrol in the certification, simply select the Assignment tab. In Programs, this is referred to as allocations, but it means the same thing. Just keep in mind that users only need to enrol in the certification, not in the Program.

The screenshot shows the 'New Certification' page in the eWorks interface. The 'Assignment settings' tab is selected and highlighted with a red box. An arrow points to the 'Public' field in the 'Assignment settings' section.

Section	Field	Value
Assignment settings	Public:	No
	Visible to cohorts:	-

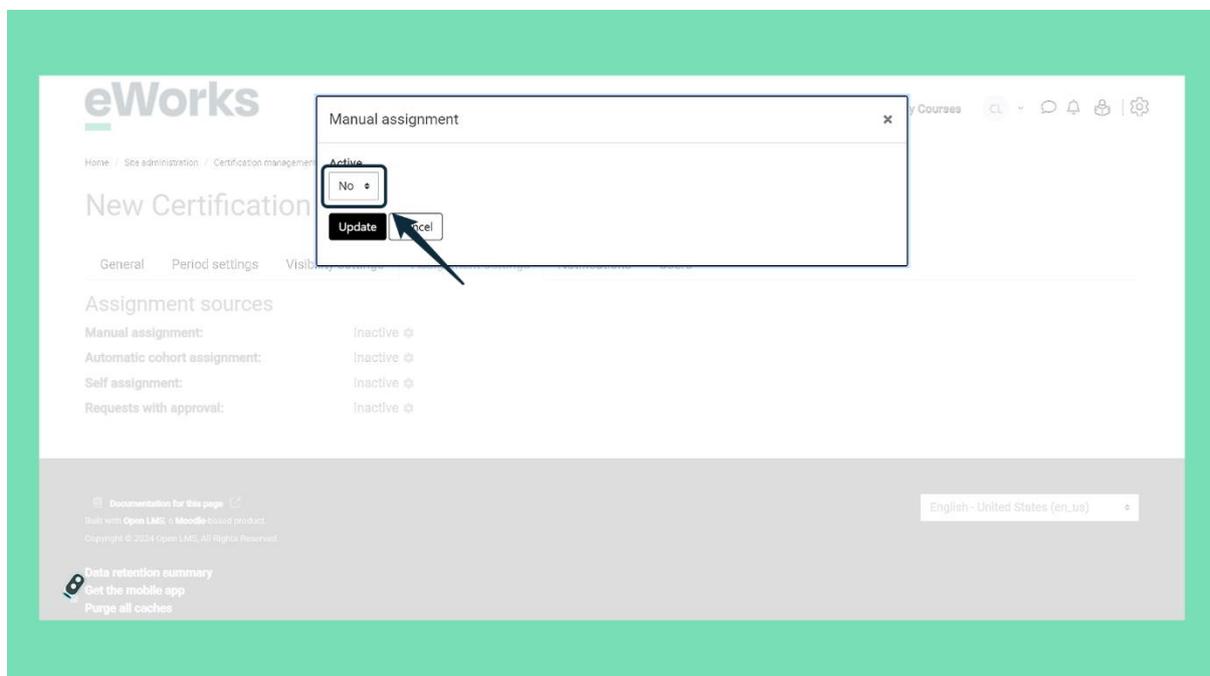
29. Manual Assignment

In this example, we will first set up Manual assignment.



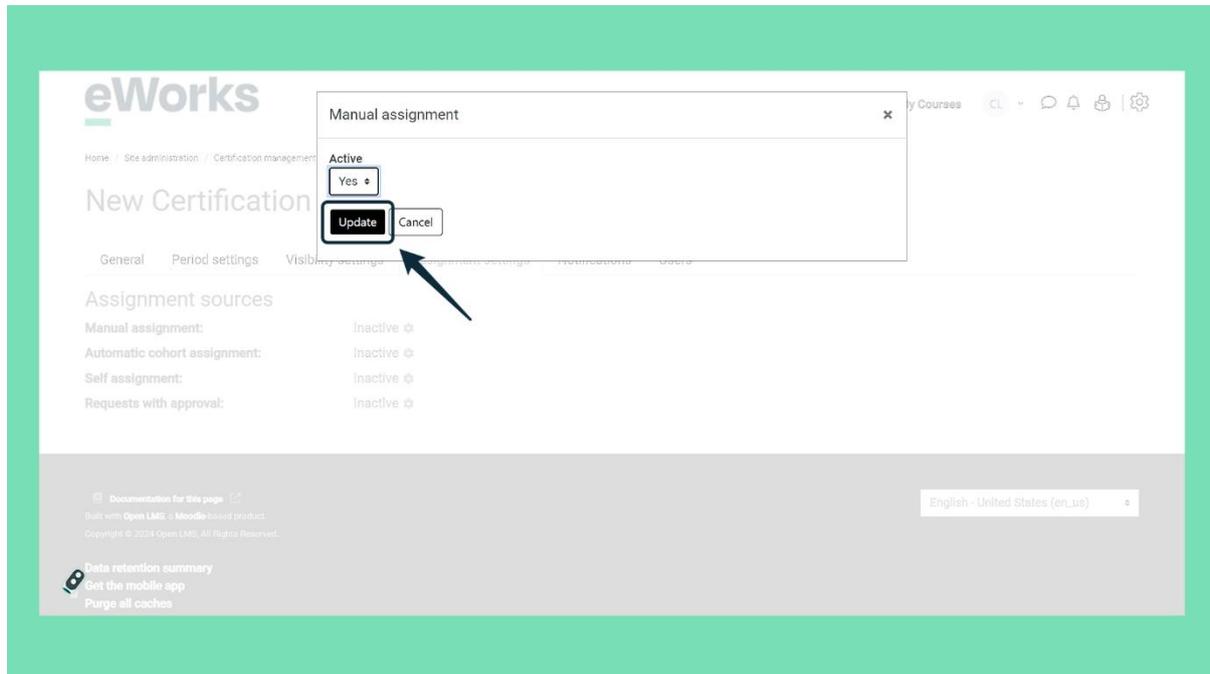
30. Activate Manual Assignment

Select 'Yes' from the dropdown to enable the manual assignment feature.



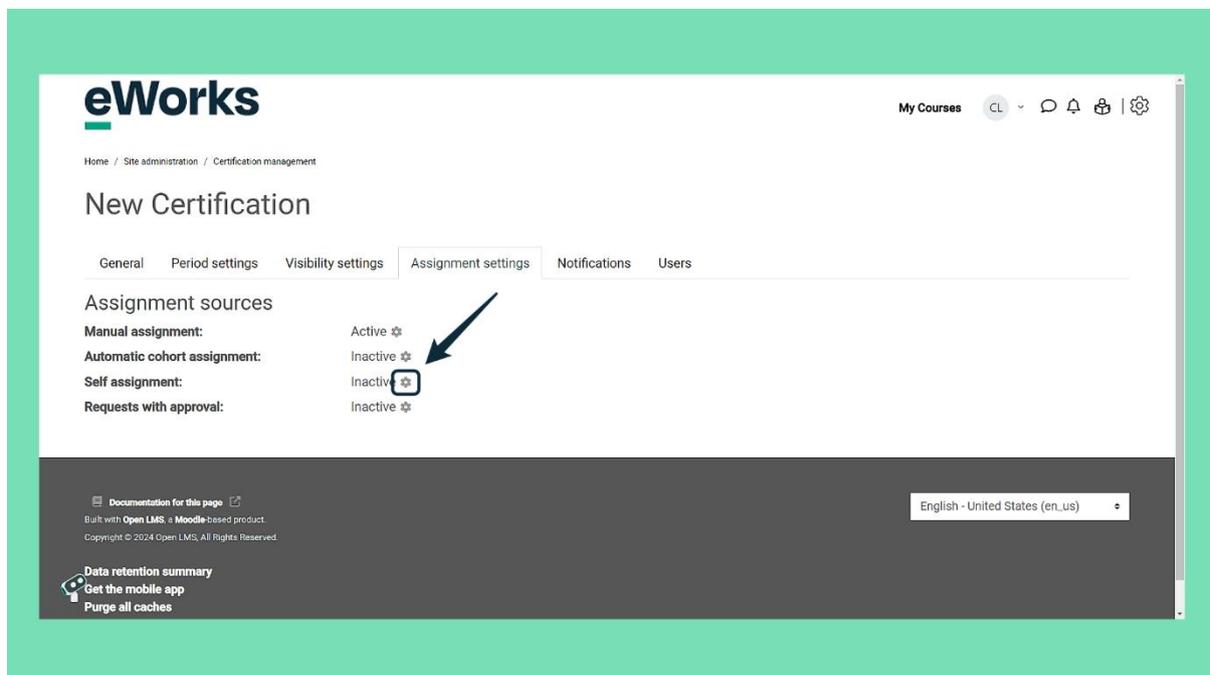
31. Manual Assignment Update

Click 'Update' to save your changes.



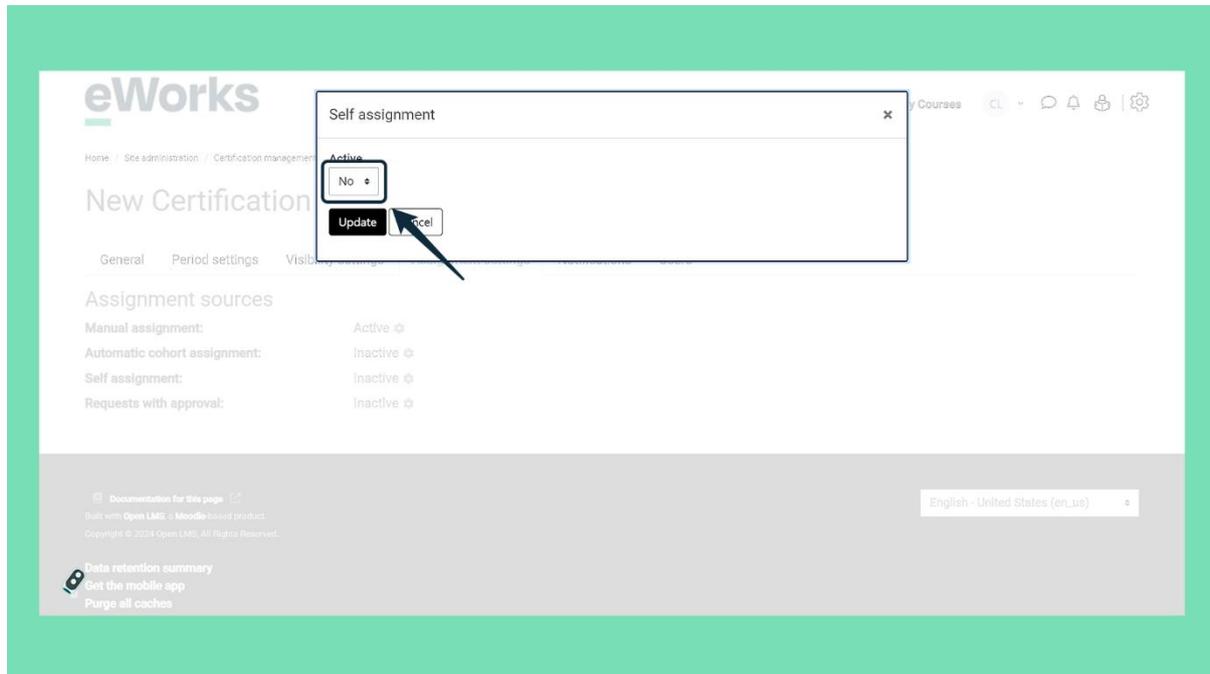
32. Self Assignment Settings

We will also set up self assignment so users can self-enrol themselves into the certification.



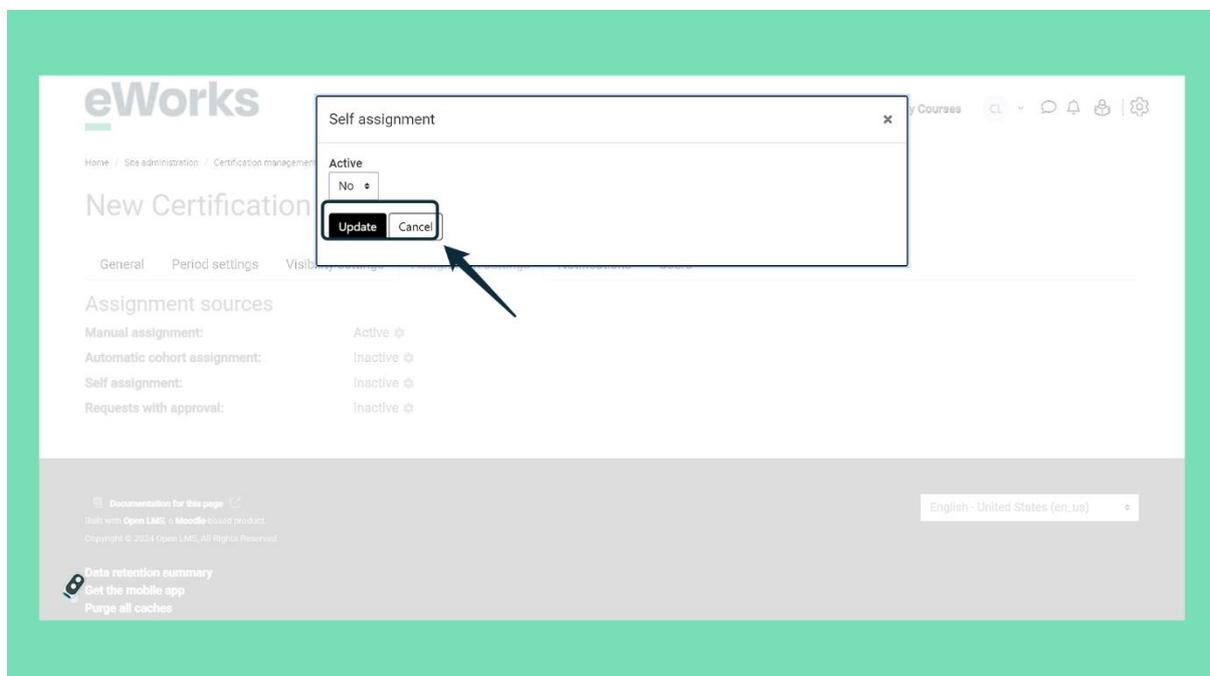
33. Self Assignment Activation

Select 'Yes' to enable self assignment options.



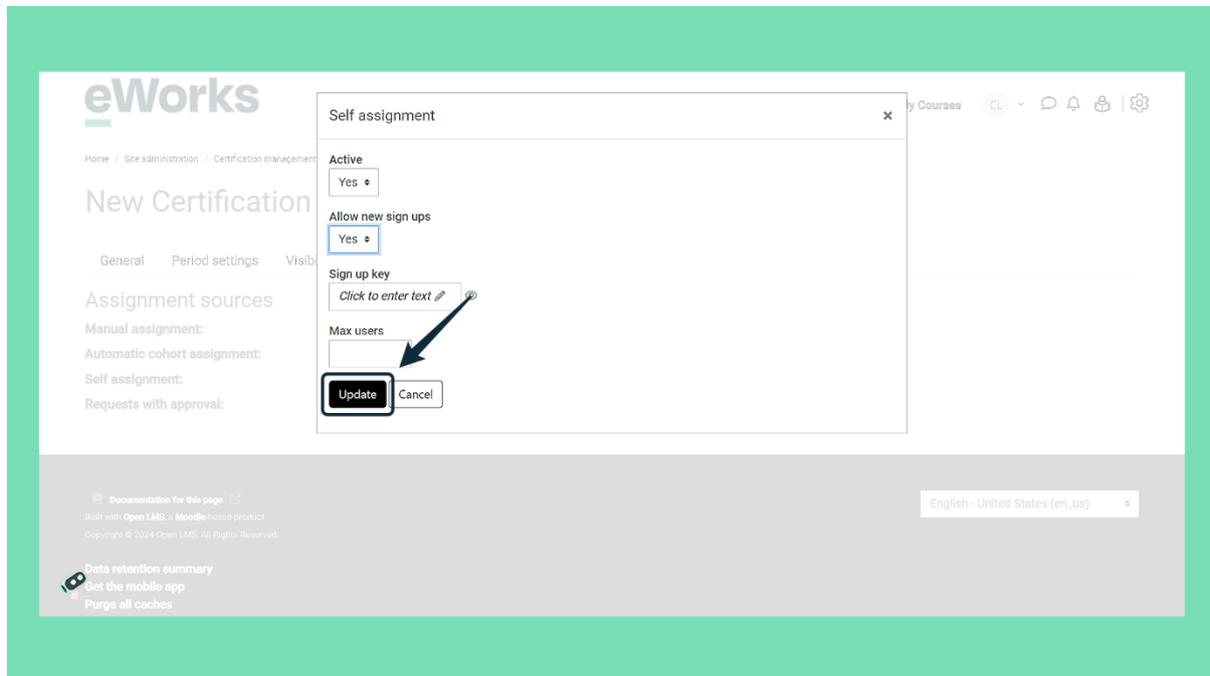
34. Update or Cancel Options

Choose 'Update' to save changes.



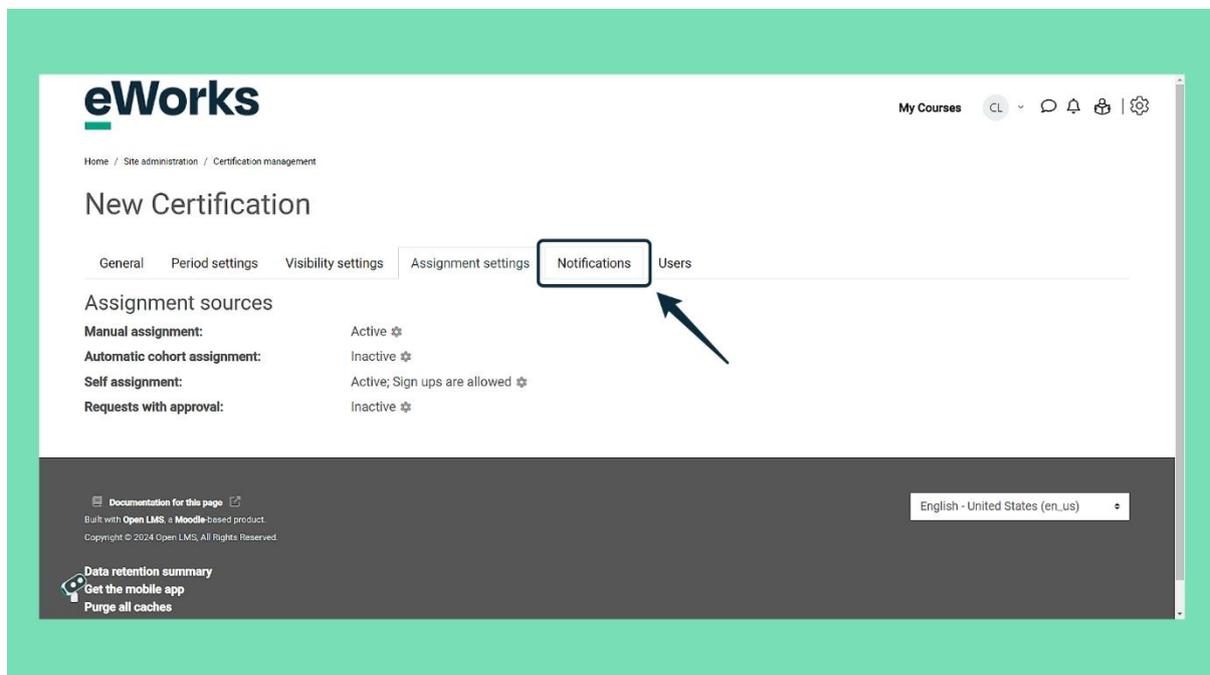
35. Self Assignment configuration

Select "Yes" to allow new sign ups. If required, add a sign up key and maximum number of users who can self enrol.



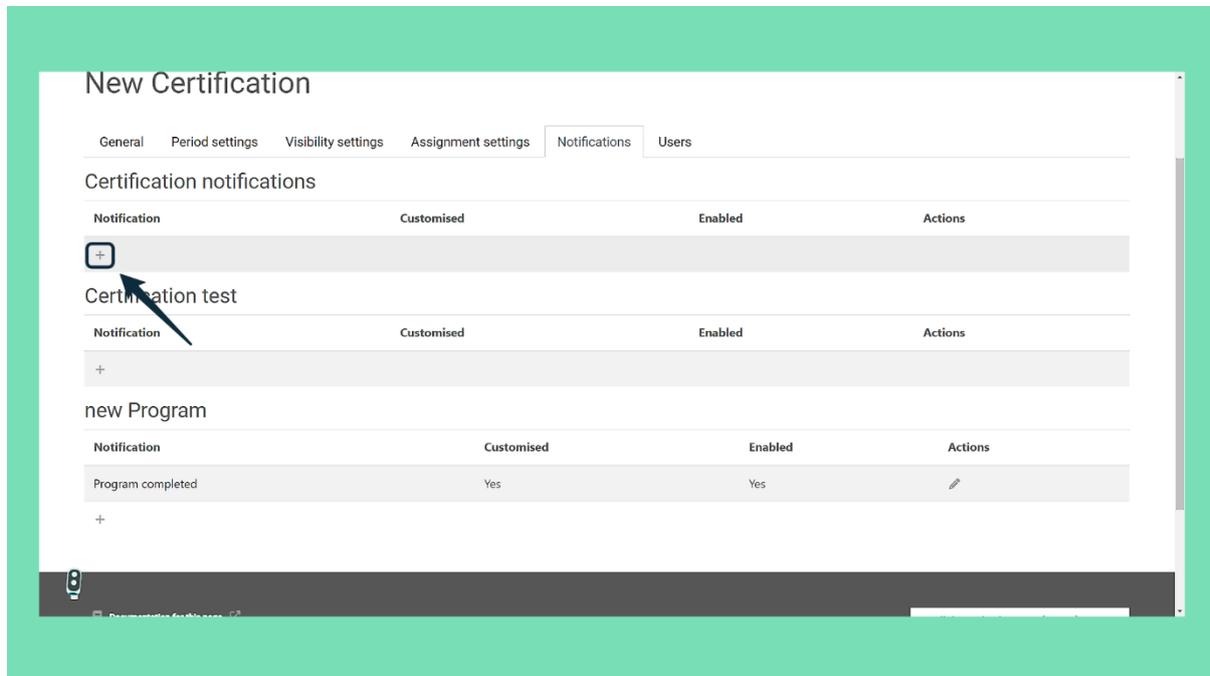
36. Notifications Tab

Access and manage your notification settings in this section.



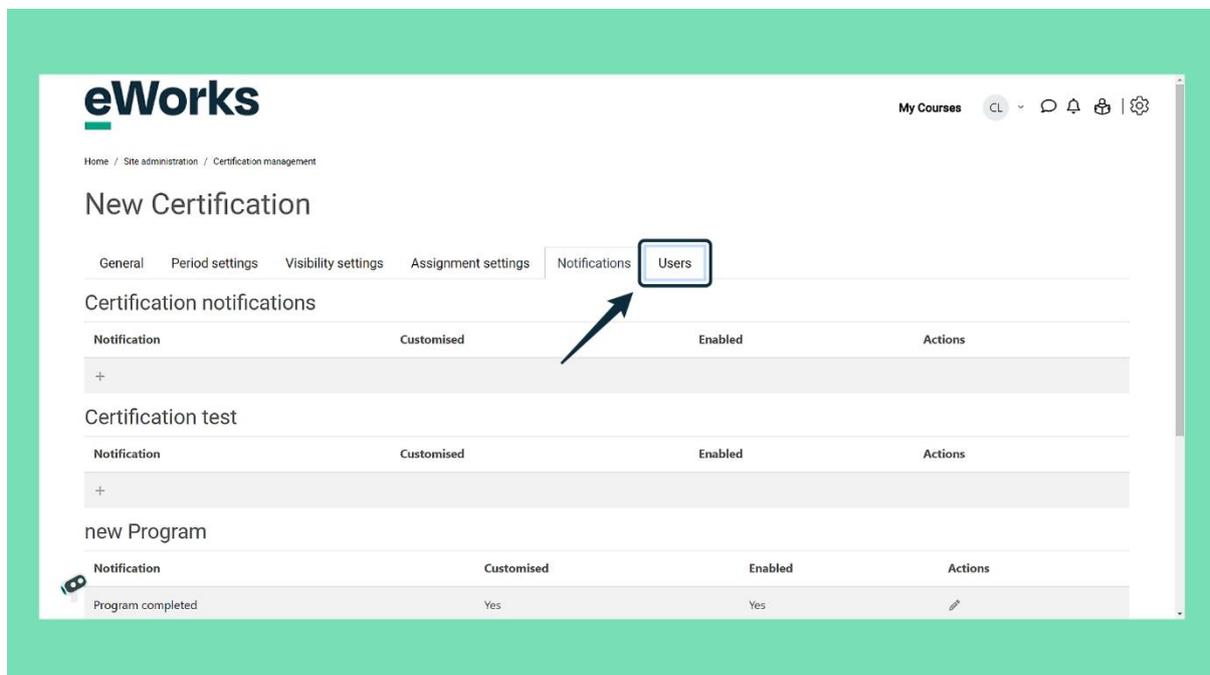
37. Add New Notification

On this screen, you're able to add notifications for both re-certifications and original certifications. Plus, you'll see any notifications you've already added for the Programs.



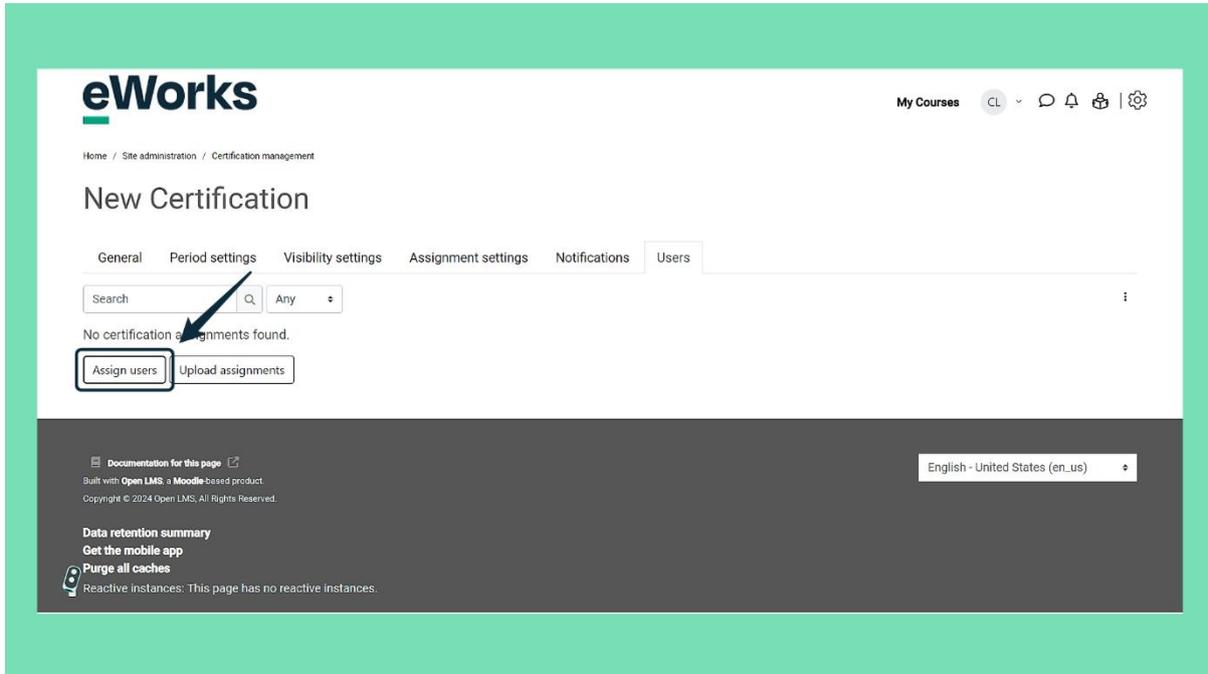
38. Users Tab

Select this tab to manage users.



39. Assign Users Button

If using manual assignments, click on assign users.



40. Assigning users

Select the users or cohorts from the drop-down box. If necessary, adjust the window opening time or certification due time. When finished, click on Assign users. Once you have set this up properly, users will be automatically enrolled into the program that was chosen. We hope you have found these two videos useful. If you have any questions, please reach out to the support team.

