## **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.

eWorks	My Courses	ແ - ဝ၃ & Iĝ
elcome to our Sandbox site		<ul> <li>&gt; Question bank</li> <li>&gt; Question bank</li> <li>&gt; Course catalogue</li> <li>= Centralized content management</li> <li>&gt; Content bank</li> <li>&gt; Site administration</li> <li>&gt; Notifications</li> <li>⇒ Registration</li> <li>⇒ Advanced features</li> <li>&gt; Users</li> <li>&gt; Courses</li> <li>&gt; Grades</li> <li>&gt; Programs</li> <li>Certifications</li> </ul>
Featured courses		> Badges > H5P > License > Certificates > Location > Language > Messaging

## 4. Certification Management

Click on Certification Management.

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elcome to our Sandbox site		<ul> <li>&gt; Question bank</li> <li>&gt; Question bank</li> <li>© Course catalogue</li> <li>© Centralized content management</li> <li>~ Content bank</li> <li>~ Site administration</li> <li>N Notifications</li> <li>© Registration</li> <li>© Advanced features</li> <li>&gt; Users</li> <li>&gt; Courses</li> <li>&gt; Grades</li> <li>&gt; Programs</li> <li>~ Certifications</li> </ul>
Featured courses		Commencement     Certification settings     Certification custom     fields     Competencies     Sadges     H5P



### 5. Add a new Certification

Click on add certification.

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Certificati	on management				
Active Archived					All certifications (9) •
Search	Q				Add certification
Category	Certification name *	Candidate ID	Description	Assignments	Public
System	Certification TEST	123		2	Yes
System	Emergency Evacuation	Test		1	Yes
System	eWorks Certification	999		0	No
System	eWorks Test	988		0	No
System	First Aid	1		0	No
System	TEST	2132333		0	No
System	TEST	987		1	No

## 6. Certification Name Field

Enter the name of the certification in the designated field.

evvo	rks	Add certification			× <sup>/ly Courses</sup>	
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System	0.1					No
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## 7. Certification settings

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

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System		Tags Manage standard tags				Yes
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#### 8. Add Certification Button

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

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System	0.1	Add certification Cancel		No
9 System	© Too	901		No



## 9. Period Settings Tab

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

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Home / Site administration / Certification	lanagement	
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Candidate ID:	99645	
Category:	System	
Description:	No	
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## 10. Certification Settings

Click on the certification settings cog.

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Certification		
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Window closing:	Never	
Expiration:	Never	
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Re-certify automatically:	No	
Certificates #		
Certificate template:	Not set	
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#### 11. Program Selection Field

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

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Home / Site administration / Certification manager	Program <u>*</u>
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Re-certify automatically:	Expires after
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Certificate template:	Re-certify before expiry
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#### 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.

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	Search 🔻
New Certificatio	Certification program reset
	Standard course purge +
General Period settings Vi	Ib Due after
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	Expires after
	Months   Never
	Re-certify before expiry
	0 days + Enable
Certificate template:	Index section Consel
Ø	Oposte Certification Cancel



#### 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.

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	Search 🔻	
New Certificatio	Certification program reset	
	Full course purge ¢	
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	Re-certify before expiry	
Certificates 🔹	0 days 🗢 🗆 Enable	
Certificate template:		
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#### 14. Set Expiration Time

Enter the duration for when the certification should expire.

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#### 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.

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#### 16. Enable Re-certification

Select this checkbox to activate the re-certification process.

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Home / Site administration / Certification managem	Search V
New Certification	Certification program reset Full course purge •
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#### 17. Re-certification Before Expiry Setting

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

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	Re-certify before expiry
Certificates 🟚	0 days • G Enable
Certificate template:	

#### 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.

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### 19. Certification Update

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

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Re-certify automatically:	Re-certify before expiry
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## 20. Re-certification Settings

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

Valid from:	Certification completion date	
Window closing:	Never	
Expiration:	12 months after Certification completion date	
Certification program reset:	Full course purge	
Re-certify automatically:	28 days before Expiration	
Re-certification		
Program:	Certification test	
Grace period:	Not set	
Re-certification program reset:	Standard course purge	
Valid from:	Certification due	
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Expiration:	12 months after Certification completion date	
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#### 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.

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#### 22. Course Purge Selection

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

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Grace period:	Update re-certification Cancel	



#### 23. Certification Due Selection

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Grace period:	Opoate re-certification Cancel	
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Select the due date for the certification to be valid from.

## 24. Expiration Setting for Certification

Specify the duration after which the certification expires.

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Program:	Grace period	
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Re-certify automatically:		
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Re-certification p		
	Update re-certification Cancel	
Grace period:		



### 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.

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#### 26. Certificate Settings

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

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#### 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.

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Re-certify automatically:	28 days before Expiration	
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.

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### 29. Manual Assignment

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

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## 30. Activate Manual Assignment

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

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### 31. Manual Assignment Update

Click 'Update' to save your changes.

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## 32. Self Assignment Settings

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

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## 33. Self Assignment Activation

Select 'Yes' to enable self assignment options.

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New Certificatio		
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Assignment sources		
Manual assignment:		
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## 34. Update or Cancel Options

Choose 'Update' to save changes.

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Home / Site administration / Certification manageme	Active No •		
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### 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.

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#### 36. Notifications Tab

Access and manage your notification settings in this section.

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#### 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.

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new Program			
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+			

#### 38. Users Tab

Select this tab to manage users.

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new Program				
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#### 39. Assign Users Button

If using manual assignments, click on assign users.

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New Certification	
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No certification a signments found.	
Assign users Upload assignments	
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Data retention summary Get the mobile app	
Purge all caches Reactive instances: This page has no reactive instances.	

#### 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.

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