Managing Certifications

Create a certification

1. Click **Courses** from the **Site administration** menu.
2. Click **Manage certifications**.
3. The **Find Courses** page opens on certification view in edit mode. Click **Add a new certification** to set up a new certification.
4. Complete the **Details** section.
5. Click **Save changes** and the *Overview* tab displays. You have now created your certification; the next step is to add the certification content and certification assignments.

Details

Setting	Description	Notes
Category	Select the category this certification will be saved in. This choice will affect where your certification is displayed on the certification listing and may make it easier for learners to find your certification.	-
Full name	The full name of the certification is displayed at the top of the screen and in the certification listings.	-
Short name	The certification short name will be used in several places where the full name isn't appropriate (such as in the subject line of an alert message).	-
ID	The ID number of a certification is only used when matching this certification against external systems. If you have a code for this certification then use it here, otherwise you can leave it blank.	-
Availability	This option allows you to hide the certification from learners. When set to **Not available to students** it will not appear in any listings, except to administrators. When set to **Available to students**, learners are able to view and access the certification details.	-
Available from /Available until	This option allows you to hide the certification outside the specified date range and you can specify both, just one, or neither of these dates. Outside the dates learners won't be able to search for the certification and if the user has not made progress it won't appear in their **Record of Learning: Certifications**.	This won't affect actions for users already assigned to the Certificate, for example these users will still receive certificate messages.
Summary	Enter a description of the certification which will be visible to learners in the catalogue. The HTML editor allows you to format text as well as including links and embedding images or video.	-
Summary files	Certification summary files, such as images, are displayed in the list of certifications together with the summary.	-
End note	The end note is displayed when the learner has completed the certification.	-
Visible	When checked, the certification will appear in certification listings and search results, and learners will be able to view the certification contents. When unchecked the certification will not appear in certification listings or search results, but the certification will still be displayed in the learning plans of any learners who have been assigned to the certification, and learners can still access the program if they know the certification's URL.	You will only see this option if audience-based visibility is not enabled on your site.

On this page

The Totara Academy has a whole course dedicated to using Programs and certifications in Totara Learn. Here you can learn more on how to use programs and certifications, see best practice, and give it a go yourself.

Visibility	There are four visibility options available: • **Visible to no users:** The certification will not be visible to any users (except those with extra role permissions) • **Visible to enrolled users:** The certification will only be visible to users assigned to the certification. • **Visible to enrolled users and members of the selected audiences:** The certification is only visible to users already assigned to the certification and members of any of the assigned audiences. To choose audiences this certification will be visible to, click the **Add visible audiences** button. A dialog will appear allowing you to select the audience(s) who will see this certification. Select the audience(s) and then click **OK**. • **Visible to all users:** The certification will be visible to all users in the system.	You will only see this option if audience-based visibility *is* enabled on your site. Also note that users granted the **manageaudiencevisibility** capability ('Manager' roles by default) can see all certifications.
Current icon	Choose the icon to display in the catalogue next to this certification. To choose a new icon, click the **Choose icon** button and select another image.	-
Allow extension requests	When enabled users can submit extension requests for this program which can then be approved or denied by their manager. If a user has more than one job assignment with different managers, an extension request notification is sent to all of the user's managers and any of them can approve or deny the extension request.	Extension requests need to be enabled on the Advanced features page to be able to allow or disallow extension requests.

Add certification content

Here you set the learning content that learners will be required to complete to gain and maintain certification.

To add content to your certification (skip to step 4 if you already have your certification open):

1. Click **Courses** from the **Site administration** menu.
2. Click **Manage certifications**.
3. The **Find Courses** page opens on certification view in edit mode. Click to open your certification.
4. Click **Edit program content** on the *Overview* tab or click the **Content** tab.
5. Under the **Original certification path** section, select **Set of courses** from the **Add a new** dropdown menu and click **Add**.
6. Click through the course categories and select the course(s) you wish to add. If you're adding multiple courses, you need to select your courses in the order you wish them to appear in the set.

   Note that if completion tracking is not enabled for a course, that course will not be available to add to a certification.

7. Selected course(s) appear in the current selection column, click the delete icon to remove the course from the certification selection.
8. Click **Ok** to complete the course selection.
9. Give your set a name and complete the settings:

Setting	Description	Notes
Learner must complete	Choose either **One course** or **All courses**.	-

Minimum time required	This determines the minimum amount of time that users should be given if they are to have enough time to complete the course set. Please carefully read the warning alongside this description. For example, if set to one week, then it is expected that the user should be granted at least one week to be able to complete the course set, and that it would not be possible to complete it in any time less than that.	Setting this does not mean the user only has a certain amount of time to complete a course set, nor does it set or affect the certification due date. This does not determine the maximum time allowed to complete the course set and setting this does not set a due date. It is used to generate exceptions when a completion date set in the **Assignments** tab is insufficient and is used to automatically set a sufficiently generous due date when resolving time allowance exceptions using the **Set realistic time allowance** action.

10. You can have one or more course sets. If you have more than one, you can choose the rule between them:

    - **Or:** Learners can either complete the learning in the first course set or the second course set. The learning of both course sets is available at the same time.
    - **Then:** Learners must complete the first course set before being given access to the second course set.
    - **And:** Learners must complete the first course set and the second set. The course sets will be made available to complete at the same time and do not have to be completed in order.

    Follow steps 5-10 above as required if you need to add additional content.

11. Under the **Recertification path** section you have two options:

    - If you would like to use the same content as your original certification path, select **Use the existing certification content**. This will copy everything you entered into the original certification path into the recertification path.

      Note that this copying only happens once; afterwards, if you make a change to one path, you will need to manually make the same change to the other path if you want to keep them the same.

    - If the content is different, simply add additional sets of courses as required following steps 5 - 10 above.

12. Click **Save changes**.

13. A warning message containing the number of learners who are currently assigned to the certification that would be affected by changes is displayed. Click **Save all changes**. The content has now been added to your certification and you are ready to set the learner assignments.

Add Upcoming Certification block

This block can be added to the frontpage, a dashboard or a course page to quickly show when the learner's Certifications are due.

To add an Upcoming Certification block to a page:

1. Go to the page that you want the block to appear.
2. Select **Turn editing on**.
3. Go to the **Add a block** area and select **Upcoming Certifications** block.
4. Move the block to the location if needed.

Assigning users to multiple certifications which contain some matching course content

This scenario is not recommended when managing certifications due to the potential this creates for users needing to re-complete the course that is contained in both certifications.

Where two or more certifications contain some matching course content, assigning a user to one certification and then adding the same user to another different certification will result in an **Exception** being created for this user. (See Exception Reports).

These exceptions shouldn't be ignored/dismissed as they are a warning that user's with these exceptions may have course progress reset and may need to repeat the courses contained within more than one certification they are assigned to.

Assigning a user to multiple certifications which all have the same courses creates a likelihood for the overlapping of window opening dates and the archiving of course completions on certifications which are already in progress.

Add certification assignments

Certification assignment allows you to select the learners who need to complete the certification. You can select users by organisation, position, audience, management hierarchy, or individually. Once you have assigned learners to the certification, the system automatically takes care of course enrolment.

To add learners to your certification (skip to step 4 if you already have your certification open):

1. Click **Courses** from the **Site administration** menu.
2. Click **Manage certifications**.
3. The **Find Courses** page opens on certification view in edit mode. Click to open your certification.
4. Click **Edit program assignments** on the **Overview** tab.
5. Select how you want to add learners to your certification from the **Add a new** dropdown menu and click **Add**.

If	Then
Adding by organisation	1. Select **Organisations** from the **Add a new** dropdown menu and click **Add**. 2. The organisation options appear. Click **Add organisations to program**. 3. Select the organisation framework you want to use from the dropdown box. 4. Select the organisation items you wish to assign to the certification. The selected items appear in the current selection column. Click the delete icon to remove. 5. Click **Ok** to complete the organisation selection. Select **All below** to include all users in the hierarchy structure below the selected organisation.
Adding by position	1. Select **Positions** from the **Add a new** dropdown menu and then click **Add**. 2. The position options appear. Click **Add position to program**. 3. Select the position framework from the dropdown box. 4. Select the position items you wish to assign to the certification. The selected items appear in the current selection column. Click the delete icon to remove. 5. Click **Ok** to complete the position selection. Select **All below** to include all users in the hierarchy structure below the selected position.
Adding by audience	1. Select **Audiences** from the **Add a new** dropdown menu and then click **Add**. 2. The audience options appear. Click **Add audiences to program**. 3. Select the audience groups you wish to assign to the certification. The selected audiences appear in the current selection column. Click the delete icon to remove. 4. Click **Ok** to complete the audience selection. To learn more about creating audiences, see Audiences.

Adding by management hierarchy	1. Select **Management hierarchy** from the **Add a new** dropdown menu and then click **Add**. 2. The management hierarchy options appear. Click **Add managers to program**. 3. Select the managers you wish to add to the certification. The selected items appear in the current selection column. Click the delete icon to remove. 4. Click **Ok** to complete the manager selection. When you select managers you can also see the staff that report to the managers by clicking to expand the folder icon. Select **direct team** to add just the manager's direct reports or **all below** to add their direct reports and their staff's direct reports.
Adding individuals	1. Select **Individuals** from the *Add a new* drop down menu and then click **Add**. 2. The individual options appear. Click **Add individuals to program**. 3. Select the names you wish to assign to the certification. The selected individuals appear in the current selection column. Click the delete icon to remove. 4. Click **Ok** to complete the position selection.

6. Click **Set completion** to set a completion date for each group/individual you have assigned to the certification. This will be applied to the applicable learners, giving them a due date. When setting a completion date you have two options:

    a. **Complete by:** allows you to set a fixed completion date.
    b. **Complete within:** allows you to set a completion date relative to an event, the events include:

        - Date the learner first logged in.
        - Position start date recorded on the learners position tab.
        - The date the learner completed another certification.
        - The date a learner completed another course.
        - The date record in a profile field.

7. Click **Set fixed completion date** or **Set time relative to event** to save your completion criteria.

    Prior to saving your changes, it is important that you are aware how assigning a completion date relates to a user's due date. Please see How certifications work for more information.

8. Click **Save changes**.

9. Click **Save all changes** in the confirmation box or **Edit assignments** if you want to make additional changes. Once the save is complete, a confirmation message appears at the top of the screen. Your certification assignments are now set.

Learning will be made available immediately to new users once they've self-registered. Audience membership as well as audience-based enrolled learning (i.e. course enrolment and certification/program assignment) will occur before new users first log into the platform.

For existing users, audience membership and enrolment will occur when the relevant cron runs.

Add certification messages

Messages allow you to set up automated emails related to your certification. The messages can be customised for the certification you are setting up or editing.

To customise your certification messages (skip to step 4 if you already have your certification open):

1. Click **Courses** from the **Site administration** menu.
2. Click **Manage certifications**.
3. The **Find Courses** page opens on certification view in edit mode. Click to open your certification.
4. Click **Edit program messages** on the **Overview** tab or click the **Messages** tab.

5. By default there is an enrolment message and an exception report message for each certification. To add a new message select the message type from the **Add a new** dropdown menu and then click **Add**.
6. When you add a new message you need to complete the subject line and message details to be sent. The message body can contain variables. There are two available variables:

    - **%userfullname%:** This will be replaced by the recipient's full name.
    - **%programfullname%:** This is replaced with the full name of the certification.
    - **%setlabel%:** This is replaced with the course set label, when the message relates to course sets.

    The subject line can only be changed for the learner message. When sending notice to a manager, the manager message uses a default subject line.

7. Click **Save changes**.

8. Click **Save all changes** in the confirmation box, or **Edit messages** if you need to make additional changes. Once the save is complete a confirmation message appears at the top of the screen. Your certification messages are now complete.

Program messages

Message name	Description
Course set completed message	This message will be sent whenever a course set is completed.
Enrolment message	Sent to the learner when they are assigned to a certification. Select **Send notice to manager** to send a notification to the learner's manager.
Exceptions report message	Sent to Site Administrators when there are new exceptions on the certification. An exception occurs when the system is not able to process an action related to the certification, e.g. the completion date is set for 30 days from the position start date, but this field is empty for a user assigned to the certification.
Failure to recertify message	Will be sent when a recertification period has expired and the learner will need to repeat the original certification. Select **Send notice to manager** to send a notification to the learner's manager.
Learner follow-up message	This is sent to a learner a set period of time after they have completed the certification. Use **Trigger** to set when the message is sent.
Program completed message	Sent when the learner completes the certification. Select **Send notice to manager** to send a notification to the learner's manager.
Program due message	Sent to the learner a set number of days, weeks, or months before the learner is due to complete the certification. Use **Trigger** to set when the message is sent. Select **Send notice to manager** to send a notification to the learner's manager.
Program overdue message	Sent to the learner when the certification completion date for the learner has passed. Use **Trigger** to set when the message is sent. Select **Send notice to manager** to send a notification to the learner's manager.
Recertification window due to close message	Will be sent when a recertification period is about to expire. Select **Send notice to manager** to send a notification to the learner's manager.
Recertification window open message	Will be sent when the learner has entered the period when they can recertify. Select **Send notice to manager** to send a notification to the learner's manager.

Un-enrolment message	This is sent when a learner is unenrolled from a certification. Select **Send notice to manager** to send a notification to the learner's manager.
Course set due	Sent a certain length of time before the current course set is due. The due date is calculated by adding the course set **Minimum time required** to the date the user started the course set.
Course set overdue	Sent a certain length of time after the current course set is due. The due date is calculated by adding the course set **Minimum time required** to the date the user started the course set.
Course set complete	Sent when a user completes a course set.

Define recertification details

When a learner completes a certification path, a new expiry date is calculated based on the recertification date method and the active period. As a result a new window opens date - or recertification window - is calculated from that. The recertification settings on the *Certification* tab lets you control how the those dates are calculated.

The following settings are used when making the calculations described above:

- **Active Period:** Determines how long a certification will be active before it expires.
- **Recertification Window:** How long before the certification expires the recertification window opens, giving learners time to complete the recertification path.

To define your recertification details (skip to step 4 if you already have your certification open):

1. Click **Courses** from the **Site administration** menu.
2. Click **Manage certifications**.
3. The **Find Courses** page opens on certification view in edit mode. Click to open your certification.
4. Click **Edit certification** on the **Overview** tab or click the **Certification** tab.
5. Under **Active Period**, set **Certification is active for** by entering a value in the field and select either Day(s), Week(s), Month(s), or Year(s) from the dropdown e.g. '1 Year(s)'**.**
6. Under **Recertification Window** set the **Period window opens before expiration** by entering a value in the field and select either Day(s), Week(s), Month(s), or Year(s) from the dropdown e.g. '1 Year(s)'**.**
7. Choose a **Recertification date**. You have three options:

    - **Use certification completion date:** When a user completes one of the certification paths (original or recertification), the expiry date will be calculated based on the date that the completion occurred.
    - **Use certification expiry date:** Calculate the new expiry date based on the previous one. If there was no previous expiry date (for new assignments, and no due date set in the assignments tab) or the certification has expired, then the completion date is used.
    - **Use fixed date:** Choose a fixed date (i.e 2nd of February every year)

    > See Certification/Recertification scenarios to learn more on the recertification date options and how they are calculated in different scenarios.

8. Click **Save changes**. Your certification is now complete.

Capabilities that can edit

It is possible to assign a variety of editing permissions within the program functionality. Anyone with one or more of the following capabilities will see an **Edit certification details** button whenever they view a program. By clicking on this they will then see the **Overview** tab, followed by additional tabs based on the capabilities they have assigned to them as follows:

- **totara/program:configuredetails:** For the Edit tab.
- **totara/program:configurecontent:** For the Content tab.
- **totara/program:configuremessages:** For the Messages tab.
- **totara/program:configureassignments:** - For the Assignments tab.
- **totara/program:handleexceptions:** For the Exceptions tab (this applies even if there are no exceptions currently).
- **totara/certification:configurecertification:** For the Certification tab.

- **totara/program:editcompletion:** For the Completion tab (the completion editor must be enabled in site cofig).