

How To Create Certifications

Video Transcript

How To Create Certification Paths And Certificates (Training For Site Administrators)

Welcome to Informetica's VIP training series.

During this session, you will learn how to create certification paths and certificates with the following steps:

1. Log in as a site manager
2. Select the library tab on the top navigation bar
3. From the drop-down menu located under the library, select certifications
4. After selecting certifications, you will have access to a list of all certificates in the system listed alphabetically.
5. Navigate to the right-hand side of your screen to filter by specific certification, campus, or by user group

Once you select your filter parameters, you will only be shown the certifications that are available to the groups you have selected.

To create a certificate, select the create button located on the right-hand side of your screen and then create your certification details:

1. Select the name field in the certificate details page
2. Create your certificate name (required field)
3. Create a brief description about your certificate (this is an optional field)
4. Select the status (active or inactive – required field)

5. Choose the duration of the certificate (Never expires, expires in so many days, months or years. Optional field)
6. Allow recertification rules and select yes, or no

Please Note:

Now that we have completed the certificate detail section, it's time to create your certification rules - but before we get started, please note: Certification rules cannot be edited once they are saved.

If you need to change the rules in your certificate, you will need to create a new certificate with your updated rules, and go back and deactivate your previous certificate.

To continue, we are going to create our certification rules:

1. Scroll down to the certification rules box.

If you are creating a certificate that requires users to pass one exam in a course to earn their certificate, place the number one in the box that states: a user has earned the certification after they pass one of the following.

2. Select the product or course from the drop-down menu. (Only active products will show up in the drop-down menu in this area.
3. Select the assets of the course in the drop-down menu (only active assets will be shown in the menu). An example of an asset could be a final test, a module, SCORM, assessments or evaluations.
4. Enter a passing grade as a percentage of the grade required to pass their evaluation.
5. Select add, and save rule

Please note: two certifications may be identical, but the grade may differ. For example, the same rules might apply to an instructor and a user to earn a certificate, so the same exam must be taken. However: the instructor may be required to attain a higher passing grade,

where as the general user may require a lower grade. In that case, you would be required to create two certificates because their criteria are different.

6. Scroll down to the assign user groups box where you will notice, filter campuses
7. Select the campus or campuses that the certification applies to
8. Select the user group or user groups that the certification applies to

You can click to highlight individual user groups and select either the add or remove button. You can also select multiple items by holding down the CTRL or shift keys or by clicking and dragging with your mouse.

Please note: Only users in the selected user groups are eligible to obtain the certification, even if they have set satisfied all requirements.

Now that you have filled in the required fields, you can create a certificate for your learners to print out.

1. Navigate to create your certificate. In this area, you can modify the input fields that are added to the certificate.
2. Add the certificate name
3. Add the first name and last name of the user
4. Add the certification date

You can also insert images into the certificate from your media library.

Additional scenarios you may encounter:

Scenario 1:

What if there were two courses, and the user could take one or the other to pass? We would keep the number of rules at one but add another rule.

In this case, you are going to add a second rule showing another course.

We will still add the passing grade, but now the users will only have to take one or the other to be certified.

Best Practices:

Always make sure you apply the right campuses and user groups.

When you save it, the certificate will appear in the list of your certifications.

Scenario #2:

What if users had already met the criteria of the certificate before the certificate was created?

1. Navigate to the library, certifications, and select: check eligible users. This will provide you with a list of all users, and you can select one, some, or all of them.
2. Approve your users
3. Select approve and OK

Now when you select the certificate, you will be provided with a list of names that have had the certification applied to their records.

That concludes this session on creating certification paths and certificates. I hope this was helpful. Thank you so much for watching.