

# Chapter 4

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## Certifications

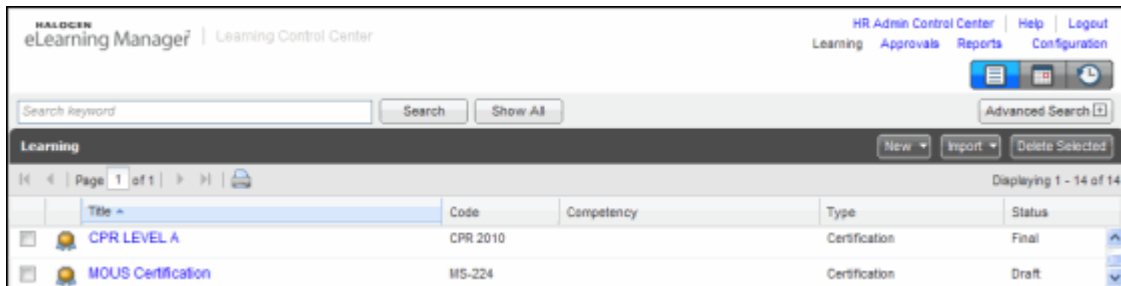
This section describes *Halogen eLearning Manager* Certifications. Certifications are a formal acknowledgement of successful achievement of a defined set of outcomes.

The section topics are as follows:

- *“About Certifications” on page 50*
- *“Creating a Certification” on page 51*
- *“Searching for Certifications” on page 53*
- *“Viewing Certification Details” on page 54*
- *“Editing Certification Details” on page 54*
- *“Deleting Certifications” on page 55*
- *“Archiving a Certification” on page 56*
- *“Awarding Certifications Automatically” on page 56*
- *“Awarding Certifications Manually” on page 59*
- *“Adding Learning Units and Paths to Certifications” on page 61*
- *“Renewing an Employee’s Certification” on page 62*
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- *“About Certification Notifications” on page 64*
- *“Configuring Certification Notifications” on page 64*
- *“Printing Certifications” on page 67*


## About Certifications

A certification is a formal acknowledgement of successful achievement of a defined set of outcomes. For example, software developers can be certified in various programming languages. An example list of certifications appears below.



The screenshot shows the 'Learning Control Center' interface. At the top, there are navigation links for 'HR Admin Control Center', 'Help', and 'Logout'. Below that are 'Learning', 'Approvals', 'Reports', and 'Configuration' links. A search bar is present with a 'Search' button and a 'Show All' button. The main content area is titled 'Learning' and contains a table of items. The table has columns for 'Title', 'Code', 'Competency', 'Type', and 'Status'. Two items are visible: 'CPR LEVEL A' with code 'CPR 2010' and status 'Final', and 'MOUS Certification' with code 'MS-224' and status 'Draft'. Both items have a gold medal icon next to their titles. The table also shows pagination information: 'Page 1 of 1' and 'Displaying 1 - 14 of 14'.

Title	Code	Competency	Type	Status
CPR LEVEL A	CPR 2010		Certification	Final
MOUS Certification	MS-224		Certification	Draft

You can quickly identify certifications in the list of items (learning units, paths, and certifications) on the main Learning page by the gold medal icon  next to them.

Some certifications have expiry dates while others do not. The Learning Control Center system allows you to set notifications for certifications with expiry dates.

In regards to licensing, the system treats licensing in the same way as a certification. For example, licenses such as a CPA, RN, or driver's license are referred to as "certifications" in the *Halogen eLearning Manager* module. Therefore, a license, such as a forklift driver's license, is considered a certification in the system.

Finally, you can also create reports that identify the certification statuses for all of the employees in your organization. For more information, see *"About eLearning Manager Reports" on page 164*.

See any of the following for more information on working with certifications:

- *"About Certifications" on page 50*
- *"Creating a Certification" on page 51*
- *"Searching for Certifications" on page 53*
- *"Viewing Certification Details" on page 54*
- *"Editing Certification Details" on page 54*
- *"Deleting Certifications" on page 55*
- *"Archiving a Certification" on page 56*
- *"Awarding Certifications Automatically" on page 56*
- *"Awarding Certifications Manually" on page 59*
- *"Adding Learning Units and Paths to Certifications" on page 61*
- *"Renewing an Employee's Certification" on page 62*
- *"Deleting an Employee's Certification" on page 64*

- *“About Certification Notifications” on page 64*
- *“Configuring Certification Notifications” on page 64*
- *“Printing Certifications” on page 67*

## Creating a Certification

Learning Administrators, Catalog Managers and Super Users can create certifications.

When you create a certification, you must give it a status. Certifications can have a status of “draft,” “archived,” or “final.”

By default, certifications have a status of “draft” when they are created. You cannot award certifications with statuses of “draft” to employees, and employees cannot view draft certifications when they are browsing learning.

Certifications that have a status of “final” can be awarded to employees, and they can view them when they browse learning.

“Archived” certifications are those that are not needed anymore. Archived certifications are not visible to employees.

Turning to certifications and catalogs, if you do not select a catalog for the certification when you create it, the certification is automatically added to the default catalog, but you can add it to other catalogs as well.

### To Add a Certification

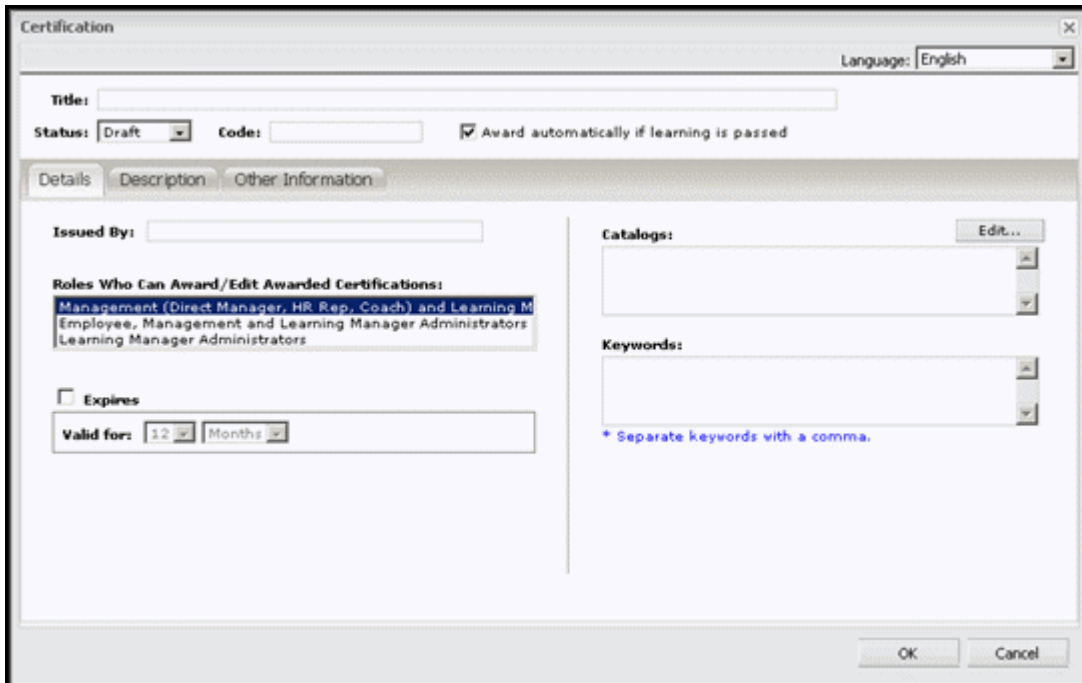
- 1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

**NOTE:** If you are already on the **Learning** page, you do not need to click the **Learning** link.

- 2 Click the **New** button, and then click **Certification....**

The **Certification** window displays.



The screenshot shows the 'Certification' window with the following fields and options:

- Title:** Text input field.
- Status:** Drop-down menu (currently set to 'Draft').
- Code:** Text input field.
- Award automatically if learning is passed**
- Issued By:** Text input field.
- Roles Who Can Award/Edit Awarded Certifications:** A list box containing the text: 'Management (Direct Manager, HR Rep, Coach) and Learning M Employee, Management and Learning Manager Administrators Learning Manager Administrators'. The first line is highlighted.
- Expires**
- Valid for:** Two input fields, one containing '12' and the other 'Months'.
- Catalogs:** A list box with an 'Edit...' button.
- Keywords:** A list box with a note: '\* Separate keywords with a comma.'
- Language:** Drop-down menu (currently set to 'English').
- Buttons:** 'OK' and 'Cancel' at the bottom right.

- 3 In the **Title** field, enter a title for the certification.  
You must use a unique title for active certifications.
- 4 In the **Code** field, enter a code for the certification.  
You must use a unique code for active certifications.
- 5 (Optional) Do any of the following:
  - In the **Status** drop-down list, select a status. Draft and archived certifications cannot be awarded and users cannot view them.
  - In the **Issued By** field, enter the name of the person/organization responsible for issuing the certification.
  - In the **Roles Who Can Award/Edit Awarded Certifications** area, select the role that you want to allow to edit the status, issue date, number, or expiry date for the certification. For example, select **Learning Manager Administrators** if you only want administrators to be able to edit those fields.
  - If you want the certification to be automatically awarded after the learner completes a learning unit or learning path that fulfills the learning requirements of the certification, select the **Award automatically if learning is passed** check box. For more information, see *"Awarding Certifications Automatically" on page 56*.
  - If the certification expires after a period of time, select the **Expires** check box, and then enter the number of months or years the certification is valid for. The value you enter here will be prefilled

in the **Valid for** field when you manually award a certification to an employee. For more information, see *“Awarding Certifications Manually” on page 59*.

- In the **Catalogs** area, click the **Edit...** button if you want to add the certification to a catalog or several catalogs.
- In the **Keywords** area, enter keywords for the certification. These keywords are used to help you search for a certification from the Learning home page.

**6** (Optional) Click the **Description** tab, and then enter a description of the certification.

This description will be visible to all learners.

**7** (Optional) Click the **Other Information** tab, and then enter any relevant extra information.

For example, you might want to add information on continuing education requirements here.

**8** Click the **OK** button.

## Searching for Certifications

By default, the “Learning” page displays learning units, learning paths, and certifications. However, you can search for certifications in specific catalogs, by the certification status (draft, archived, or final), by the certification cost, and by region. In addition, you can enter text when you search for certifications, which will be checked against the following fields:

- Title
- Code
- Keyword
- Description
- Competency
- Purpose

### To Search For a Certification

**1** From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

**NOTE:** If you are already on the **Learning** page, you do not need to click the **Learning** link.

**2** Click the **Advanced Search** button.

**3** In the **Type** drop-down list, click **Certification** then click the **Search** button.

A list of certifications displays.

### 4 (Optional) Do any of the following:

- If there are many certifications and you need to refine your search further, enter some search text in the field, and then click the **Search** button.
- If you want to refine your search even further, make your selections from the check boxes and/or date choosers, and then click the **Search** button.

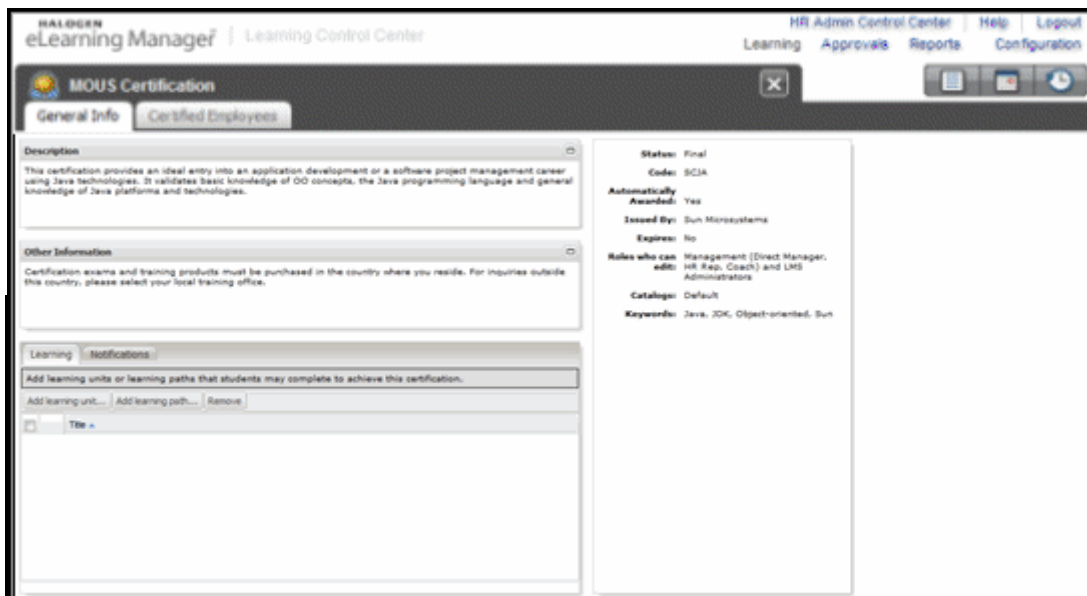
## Viewing Certification Details

From the Learning page, you can view certification details for individual certifications.

### To View Certification Details

- 1 Locate the certification whose details you want to view. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification you want to view.

The certification details display showing a **Description** area, an **Other Information** area, and other details on the right-hand side.



## Editing Certification Details

You can edit details of the certification, such as the title, code, keywords, and so forth, at any time. For example, you may want to edit details in the other information area if the location of the certification test changes.

## To Edit a Certification

- 1 Locate the certification you want to edit. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification you want to edit.  
The **Certification** page displays.
- 3 Click the **Edit...** button.  
The **Certification** window displays showing the details for the certification.

The screenshot shows the 'Certification' window with the following details:

- Title:** Sun Certified Java Associate
- Status:** Final
- Code:** SCJA
- Award automatically if learning is passed
- Issued By:** (empty field)
- Roles Who Can Award/Edit Awarded Certifications:**
  - Management (Direct Manager, HR Rep, Coach) and Learning M
  - Employee, Management and Learning Manager Administrators
  - Learning Manager Administrators
- Expires
- Valid for:** 6 Months
- Catalogs:** Default
- Keywords:** (empty field)
- \* Separate keywords with a comma.

- 4 Edit the fields as required. For more information on the certification fields, see *“Creating a Certification” on page 51*.  
**NOTE:** The status can only be modified by the roles defined in the **Roles Who Can Award/Edit Awarded Certifications** area.
- 5 Click the **OK** button.

## Deleting Certifications

When you delete a certification, any links to learning units or learning paths are also deleted. In addition, if a certification is linked to an employee, certification data for the employee will also be deleted.

Consider archiving a certification if you do not want links to learning units/paths and employee certification data to be lost. For more information on archiving a certification, see *“Archiving a Certification” on page 56*.

- 1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

**NOTE:** If you are already on the **Learning** page, you do not need to click the **Learning** link.

- 2 Select the check box next to the certification you want to delete.
- 3 Click the **Delete Selected** button.
- 4 Click the **OK** button to confirm.

## Archiving a Certification

Archive a certification if you do not want users to see the certification in catalogs. For example, you may want to archive a certification if it is no longer relevant to new employees, but you do not want to delete all certification records for employees who have already achieved the certification.

If you'd rather delete a certification and all of the employee data associated with it, see *"Deleting Certifications" on page 55*.

### To Archive a Certification

- 1 Locate the certification you want to archive. For more information, see *"Searching for Certifications" on page 53*.
- 2 In the **Title** column, click the link for the certification you want to archive.  
The **Certification** page displays.
- 3 Click the **Edit...** button.  
The **Certification** window displays showing the details for the certification.
- 4 In the **Status** drop-down list, select **Archived**.
- 5 Click the **OK** button.  
The status of the certification changes to "archived."

## Awarding Certifications Automatically

When you create a certification, you have the option to award a certification automatically when an employee successfully completes a learning unit or learning path (see step 5 in *"Creating a Certification" on page 51*).

To award a certification automatically, the learning unit associated with it must use a pass/fail scoring system (see *"Managing Results Settings for a Learning Unit" on page 43* for more information). In addition, if the employee successfully completes one learning unit, the certification will be awarded, regardless of how many learning units are



associated with the certification. For example, suppose you have three learning units associated with the certification and you want to automatically award certifications. If the employee successfully completes the first learning unit, the certification will be awarded automatically.

If you want an employee to complete several learning units before the certification is awarded, associate a learning path to the certification and include the learning units in the learning path. Note that you cannot configure a combination of learning inside the certification itself.

You can always assign learning to the certification that does not use a pass/fail scoring system, but it will not be automatically awarded.

Once the certification has been awarded to an employee, the notification agent will check the status of the certification and send out notifications accordingly. For more information on certification notifications, see *“About Certification Notifications” on page 64*.

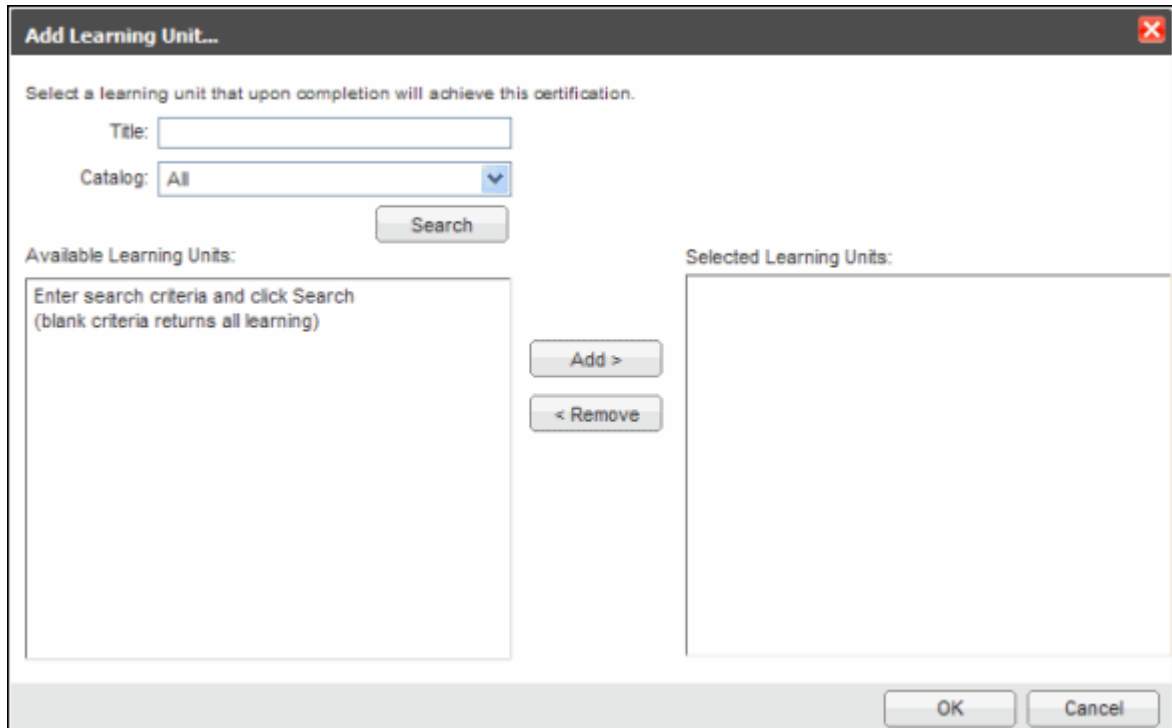
If you change the pass/fail results of a learning unit after it has been automatically awarded—for example, setting the results to “Fail” from “Pass”—the employee's certification will not be deleted from their personal pages; instead, you must manually delete certifications that have been automatically awarded. For more information on deleting certifications, see *“Deleting Certifications” on page 55*.

The following procedure assumes you have already created the certification. If you have not yet created the certification, do so now. For more information, see *“Creating a Certification” on page 51*.

## To Award Certifications Automatically

- 1 Locate the certification you want to award to the employee. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification you want to automatically award. The **Certification** page displays.
- 3 Click the **Edit...** button. The **Certification** details window displays.
- 4 Select the **Award automatically if learning is passed** check box, and then click the **OK** button.
- 5 Click the **Learning** tab.

- 6 Do either of the following:
  - Click the **Add Learning Unit...** button.The **Add Learning Unit...** window displays.



**OR**

- Click the **Add Learning Path...** button.
- The **Add Learning Path** window displays.
- 7 (Optional) Enter a title of the learning unit or learning path in the **Title** field, and/or select a catalog in the **Catalog** drop-down list.
  - 8 Click the **Search** button.

The list of learning units (or paths) appears in the **Available Learning Units** area. Only learning units (or paths) with a status of “final” appear in this area. If the learning units (or paths) are in catalogs, those catalogs must also have a status of “final.”
  - 9 Select the learning units or paths, and then click the **Add >** button.
  - 10 Click the **OK** button.

The certification will now be awarded automatically when an employee completes the learning unit or path, and the name of the learning unit or path will appear in the “Awarded by” area of the certification.

**NOTE:** If you remove learning from a certification, completed certifications will not be affected. However, incomplete or future certifications will be affected.

## Awarding Certifications Manually

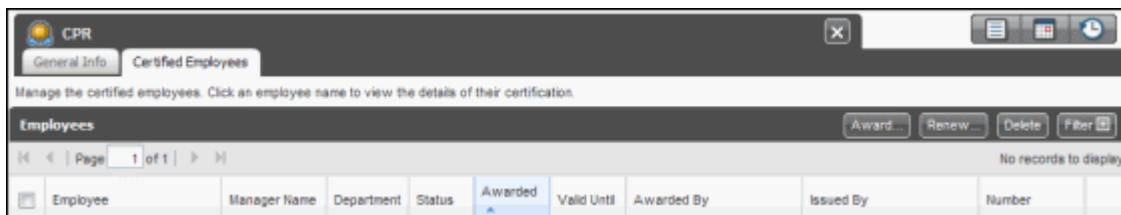
Although you can configure the system to automatically award certifications when a learning unit or learning path is successfully completed (see *“Awarding Certifications Automatically” on page 56*), you can also award certifications to employees manually. Consider awarding certifications manually if you want to review the learning more closely before awarding the certification to the employee.

Once you have awarded the certification to an employee, the notification agent will check the status of the certification and send out notifications accordingly. For more information on certification notifications, see *“About Certification Notifications” on page 64*.

### To Award a Certification to an Employee

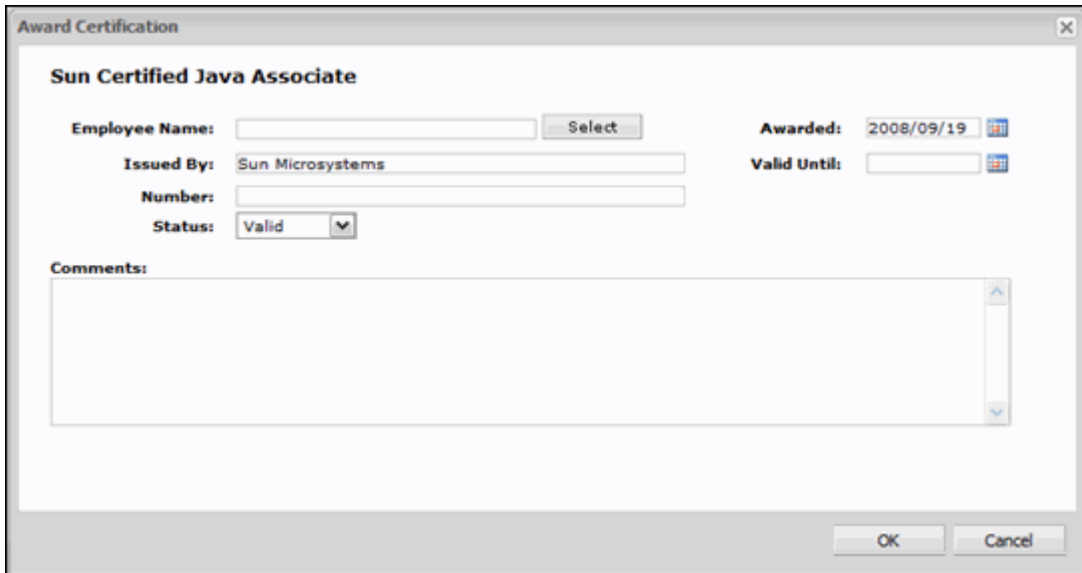
- 1 Locate the certification you want to award to the employee. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification you want to award.  
The **Certification** page displays.
- 3 Click the **Certified Employees** tab.

A list of employees currently associated with the certification you selected in step 2 appears. If no employees are currently certified, the list will be empty.



- 4 Click the **Award...** button.

The **Award Certification** window displays.



The screenshot shows a window titled "Award Certification" with a close button (X) in the top right corner. The window content is titled "Sun Certified Java Associate". It contains several fields and buttons:

- Employee Name:** A text input field followed by a "Select" button.
- Awarded:** A date field showing "2008/09/19" with a calendar icon.
- Issued By:** A text input field containing "Sun Microsystems".
- Valid Until:** A date field with a calendar icon.
- Number:** A text input field.
- Status:** A drop-down menu currently showing "Valid".
- Comments:** A large text area for entering notes.
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right of the window.

- 5 In the **Employee Name** field, click the **Select** button.

The **Select Employee** window displays.

- 6 Enter the last and/or first name in the corresponding fields, and then click the **Search** button.

A list of employees matching your search appears.

- 7 (Optional) Select either **Department** or **Email Address** from the **Show additional information** drop-down list if you need more employee information displayed.

- 8 Select the employee, and then click the **OK** button.

- 9 (Optional) Do any of the following:

- In the **Issued By** field, enter the name of the company/authority that is issuing the certification.
- In the **Number** field, enter the license number or registration number of the certification.
- In the **Status** drop-down list, select **Valid**.
- Click the **Awarded** icon to select a date.
- If the certification expires, click the **Valid Until** icon to select an expiry date.
- Enter any comments in the **Comments** field.

- 10 Click the **OK** button.

The certification has now been awarded to the employee, and your username will appear in the "Awarded by" area of the certification.

## Adding Learning Units and Paths to Certifications

If you are not automatically awarding certifications (see *“Awarding Certifications Automatically” on page 56*), you can still associate a learning unit or path with the certification. This association can be used for informational purposes only.

### To Add Learning Units and Paths to Certifications

- 1 Locate the certification you want to add Learning Units or Learning Paths to. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification to which you want to add learning units or paths.  
The **Certification** page displays.
- 3 Click the **Learning** tab.
- 4 Do either of the following:
  - Click the **Add Learning Unit...** button.  
The **Add Learning Unit...** window displays.

#### OR

- Click the **Add Learning Path...** button.  
The **Add Learning Path...** window displays.
- 5 (Optional) In the **Title** field, enter the title of the learning unit or path (if you know it).
  - 6 (Optional) Use the **Catalog** drop-down list to select the specific catalog that contains the learning unit or path.
  - 7 Click the **Search** button.  
The list of learning units or paths appears in the **Available Learning Units** field.
  - 8 Select the unit(s) or path(s), and then click the **Add >** button.
  - 9 Click the **OK** button.  
The learning units or paths appear in the list.  
**Tip:** To remove learning units or paths from the certification, select the check box(es) next to the learning units and/or path(s), then click the **< Remove** button, and then click the **OK** button to confirm.

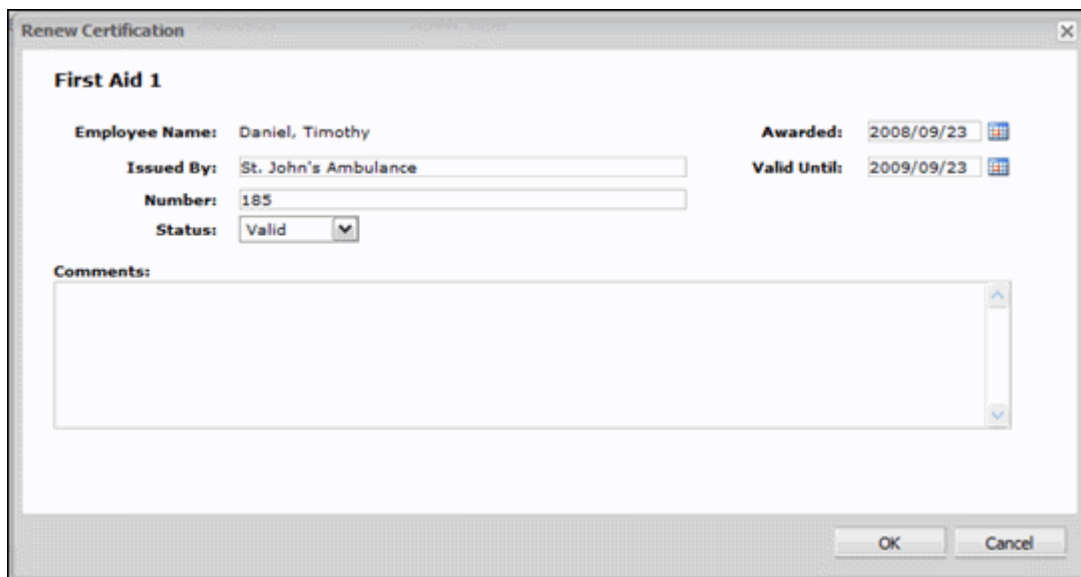
## Renewing an Employee's Certification

If you need to renew a certification for an employee, you can do so at any time. Consider renewing an employee's certification if the employee completes certification requirements before his/her current certification expires. After you have renewed a certification, the **History** area of the certification is updated to reflect the change. Note that you can only renew one employee's certification at a time.

### To Renew an Employee's Certification

- 1 Locate the certification you want to renew. For more information, see *"Searching for Certifications" on page 53*.
- 2 In the **Title** column, click the link for the certification you want to renew.  
The **Certification** page displays.
- 3 Click the **Certified Employees** tab.  
A list of employees currently associated with the certification you selected in step 2 appears.
- 4 Select the check box next to the employee whose certification you want to renew, and then click the **Renew...** button.

The **Renew Certification** window displays.



The screenshot shows a window titled "Renew Certification" with a close button (X) in the top right corner. The window content is as follows:

- First Aid 1**
- Employee Name:** Daniel, Timothy
- Awarded:** 2008/09/23 (with a calendar icon)
- Issued By:** St. John's Ambulance
- Valid Until:** 2009/09/23 (with a calendar icon)
- Number:** 185
- Status:** Valid (with a dropdown arrow)
- Comments:** A large empty text area with a vertical scrollbar.
- At the bottom right, there are **OK** and **Cancel** buttons.

- 5 (Optional) Edit any of the fields as required.
- 6 Click the **OK** button.

The certification history is updated. For more information on the employee certification history, see *"Editing An Employee's Awarded Certification" on page 63*.

## Editing An Employee's Awarded Certification

You can edit an employee's certification at any time. For example, you can edit the certification to add comments.

### To Edit an Employee's Awarded Certification

- 1 Locate the certification you want to edit. For more information, see *"Searching for Certifications" on page 53*.
- 2 In the **Title** column, click the link for the certification you want to edit.  
The **Certification** page displays.
- 3 Click the **Certified Employees** tab.  
A list of employees currently associated with the certification you selected in step 2 appears.
- 4 Click the employee name link.  
The **Certification Details** window displays for the employee you selected.

The screenshot shows a window titled "Edit Certification" for the "Sun Certified Java Programmer" certification. The window contains the following fields and controls:

- Employee Name:** Miron, Marc
- Awarded:** 2008/09/23
- Issued By:** Sun Microsystems
- Valid Until:** (empty field)
- Number:** (empty field)
- Status:** Valid (dropdown menu)
- Comments:** (empty text area)
- History:** A table with columns: Status, Awarded, Valid Until, Awarded By, Issued By, Number, and Comments. The table is currently empty.
- Buttons:** OK and Cancel buttons at the bottom right.

- 5 Edit the certification details for the employee as required.
- 6 Click the **OK** button.

## ***Deleting an Employee's Certification***

You can delete an employee's certification at any time. When you delete a certification for an employee, the employee will not appear in the certification report.

### **To Delete an Employee's Certification**

- 1 Locate the employee's certification that you want to delete. For more information, see *"Searching for Certifications" on page 53*.
- 2 In the **Title** column, click the link for the certification.  
The **Certification** page displays.
- 3 Click the **Certified Employees** tab.  
A list of employees currently associated with the certification appears.
- 4 Select the check box(es) next to the employee(s) whose certification(s) you want to delete.
- 5 Click the **Delete** button, and then click the **OK** button to confirm.

## ***About Certification Notifications***

There are two types of certification notifications:

- notifications sent out before certifications have expired
- notifications sent out after certifications have expired

You can configure each of these independently. For example, you might want to configure an impending expiry so the learner receives notifications every week 8 weeks before the certification expires. Once the certification expires, you may want to configure notifications so that the learner only receives notifications once every four months.

For information on configuring certification notification policies, such as the wording of the notification messages, whom they are sent to, and so forth, see *"eLearning Manager Notifications" on page 143*.

## ***Configuring Certification Notifications***

You can configure email notifications for certifications that are about to expire and for those that have already expired. The notification system is very flexible. For example, depending on your preferences, you can configure the certification notifications so that users receive emails starting at various weekly, monthly and/or daily intervals.



## To Configure the Sending of Certification Expiry Notifications

- 1 Locate the certification whose expiry notifications you want to configure. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification you want to configure.  
The **Certification** page displays.
- 3 Click the **Notifications** tab.  
The notification information displays.
- 4 Click the **Edit...** button below the **Notifications** tab.  
The **Edit notification details** window displays.

**Edit notification details**

Send notification when expiry is approaching

Send notification starting:   before expiry

Repeat every:

Until:   before expiry

Then send notification every:   until expired

---

Send notification when expired

Send notification starting:   after expiry

Repeat every:

OK Cancel

5 Do either or both of the following:

**To**

send notification emails before the certification expires

**Do this**

Select the **Send notification when expiry is approaching** check box, and then configure the associated fields and drop-down lists as required.

For example, suppose you want to start sending weekly notifications 12 weeks before the certification has expired. Then, in the final week before the certification expires, you want to send a notification every day.

To do this, enter **12** in the **Send notification starting** field, and then select **weeks** from the drop-down list. Then enter **1** in the **Repeat every** field, and then select **weeks** from the drop-down list. Then enter **1** in the **Until** field, and then select **weeks** from the **before expiry** drop-down list. Finally, enter **1** in the **Then send notification every** field, and then select **days** from the **until expired** drop-down list.

send notification emails after certification has expired

Select the **Send notification when expired** check box, and then configure the associated fields and drop-down lists as required.

For example, suppose you want to send a notification email indicating that the certification has expired the day after it has expired, and then you want notifications to be sent every 2 weeks after the expiry date.

To do this, enter **1** in the **Send notification starting** field, and then select **days** from the **after expiry** drop-down list. Then enter **2** in the **Repeat every** field, and then select **weeks** from the drop-down list.

6 Click the **OK** button.

## Printing Certifications

You can print certifications so your employees can display them. An example of a certification for printing appears below:



You can also add your own company logo to the printed certificate to customize it further. For more information on adding your own logo to the printed certificate, see the *User Center and Options Guide*.

### To Print a Certification

- 1 Locate the certification you want to print. For more information, see *“Searching for Certifications” on page 53*.
- 2 In the **Title** column, click the link for the certification you want to print. The **Certification** page displays.
- 3 Click the **Certified Employees** tab. A list of employees currently associated with the certification appears.
- 4 Click the **Print** button in the appropriate employee’s row. The certificate appears in a new browser window.
- 5 Use your browser’s print feature to print the certificate.