

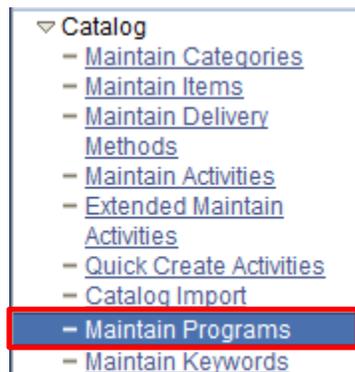
Creating a Certification



In ELM, a certification program enforces a fixed time period within which the learner must complete all items to become certified in a particular area. A certification covers a specific section or set of sections that the learner must pass if required. Certifications have an expiration date, completion rules, and recertification rules.

Prior to creating a Certification type program in ELM you must create your Catalog Items first. See the Creating a Catalog Item job aid for step by step instructions.

1. In OAKS ELM, navigate to **Enterprise Learning > Catalog > Maintain Programs**.



2. From the Maintain Programs screen, click **Add Certification**.

A screenshot of the "Maintain Programs" screen in OAKS ELM. The screen has a title "Maintain Programs" and a search section titled "Search for Programs". The search section contains several input fields: "Type:" with a dropdown menu set to "All Programs", "Name:", "Code:", "Revision:", "Owner:" with a magnifying glass icon, and "Status:" with a dropdown menu. Below the search fields are two buttons: "Search" and "Reset". At the bottom of the screen, there are two buttons: "+ Add Certification" and "+ Add Curriculum". The "+ Add Certification" button is highlighted with a red rectangular box.

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3. Fill in the following required fields within the **Certification Details** tab:

[Details](#) | [Sections](#) | [Attributes](#) | [Prerequisites](#) | [Equivalents](#) | [Notes/Attachments](#)

Enter **Certification Code**. Must be a unique code beginning with your agency identifier.

Enter **Effective Date**. Usually the creation date.

Enter **Long Name**.

Enter **Short Name**.

Enter **Status**. – Select **Active** to indicate that this program is ready to be published in the catalog, making it available to learners for registration

Enter **Revision**. Example enter *A* for the original, *B* for the first revision, and *C* for the second revision. It is recommended that you also change the effective date if you change a revision because effective dating provides true revision control.

Enter **Description**. (250 characters)

Enter **Certification Program**. If you are creating a certification program, leave this field blank. If you are creating a recertification program, enter the name of the original certification that this recertification applies to.

Enter the **Approval Type**. Identifies if an approval is required for the item.

- **None**
- **Internal Mgr – External None** (Approval required by immediate supervisor)
- **Internal Special – External None** (Approval required by someone other than immediate supervisor)

Checked by default **Parent Status Based on Child**.

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Select how you want to calculate the completion period for the certification:

Fixed: Select to calculate the completion period from the date the learner registers.

Delayed: Select to calculate the completion period from the date the learner completes the first item in the program

Enter the number of days within which the learner must acquire the certification. The system uses this value and the completion type to calculate the learner's target completion date for the certification.

Completion Information

*Completion Type: Fixed

*Completion Period: 0 Days

Warning Period: 0 Days

Enter the number of days in advance of the target completion date from which you want to send an email notification.

Expiration Information

Expiration rules apply to certifications only. Use the fields in this group box to define the expiration rules for the certification program as a whole. When the Use Cascading Expirations check box is selected, this group box is hidden and you define expiration rules for each section of the program on the Sections page.

Expiration Information

Validity Period: Days

Expiration Date: [Calendar Icon]

Grace Period: Days

Expiration Warning Period: Days

Recertification Period: Days

Recertification Warning Period: Days

Specify the number of days the certification remains valid for the learner after the learner completes the certification

Specify the fixed date on which the certification expires. Use this field as an alternative to specifying a validity period.

Enter the number of days the certification remains valid after the certification expiration date. During the grace period,

Enter the number of days before recertification expiration to indicate when you want the system to send a reminder notification to the learner

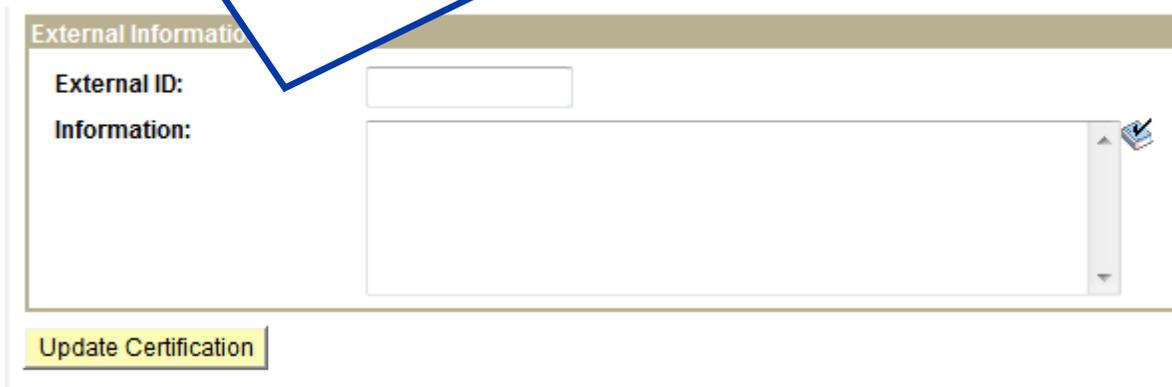
Enter the number of days before certification expiration to indicate when you want the system to send a reminder notification to the learner about the upcoming certification expiration..

Enter the number of days before actual certification expiration within which the learner must complete the recertification program to reinstate certification status

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Note. The certification expiration date defined by the Validity Period or Expiration Date field is the *soft* expiration date that the system communicates to the learner in notifications. Actual certification expiration (*hard* expiration), occurs after the grace period expires.

External ID and Information If this program contains data imported or migrated from an external source, enter the external source's unique ID for this program plus any additional information from the external source that doesn't fit into this program structure. For example, you might enter in the Information field a description, notes, and comments from the external data source about this program, such as information about format, rules, historical certification codes, and so on. These fields are for administrator use only



[+ Add Program Row](#)

Update Certification:

As certification requirements change, administrators can publish new or revised requirements to learners whose certification status is *Registered*, *In Progress*, or *Completed*. After updating the requirements, click the Update Certification button to access the Push Information page. This page lists the number of learners who are currently registered or who have completed the program. You can enter a date for sending an email notification to affected learners and their managers. The program's effective date appears by default.

The email does not describe the nature of the change, so you may want to use the email feature accessed through the program roster pages to send a second email that highlights the new or revised requirements.

Note: We recommend you insert a new effective date before updating existing requirements, if you want to track revisions to the program. Otherwise, all learners registered in the program will need to complete the new requirements once their status has changed.

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4. Click **Sections** tab and click **Add Item Section**.

Details | **Sections** | Attributes | Prerequisites | Equivalents | Notes/Attachments | Security

Name: CO-FY13 - Day 1 In-Service Training Curriculum Code: DAS-FY13-Day 1
 Effective Date: 04/15/2013 Version:

Save Create New Clone Delete Previous | Next | Return To Search Page

Section Completion Rules

Section Details

No Sections have been added to the Program

+ Add Item Section + Add Program Section

Save Create New Clone Delete Previous | Next | Return To Search Page

Click **Add Item Section**.

Click **Section Completion Rules**
 Note: Add item section must be completed first.

Each program must include at least one section. Each section can include one or more catalog items or another program.

Section Rules Summary

No Section Completion Rules have been added to this program

+ Add Section Rule Return To Previous Page

Click **Add Section Rule**

Section Rule Details

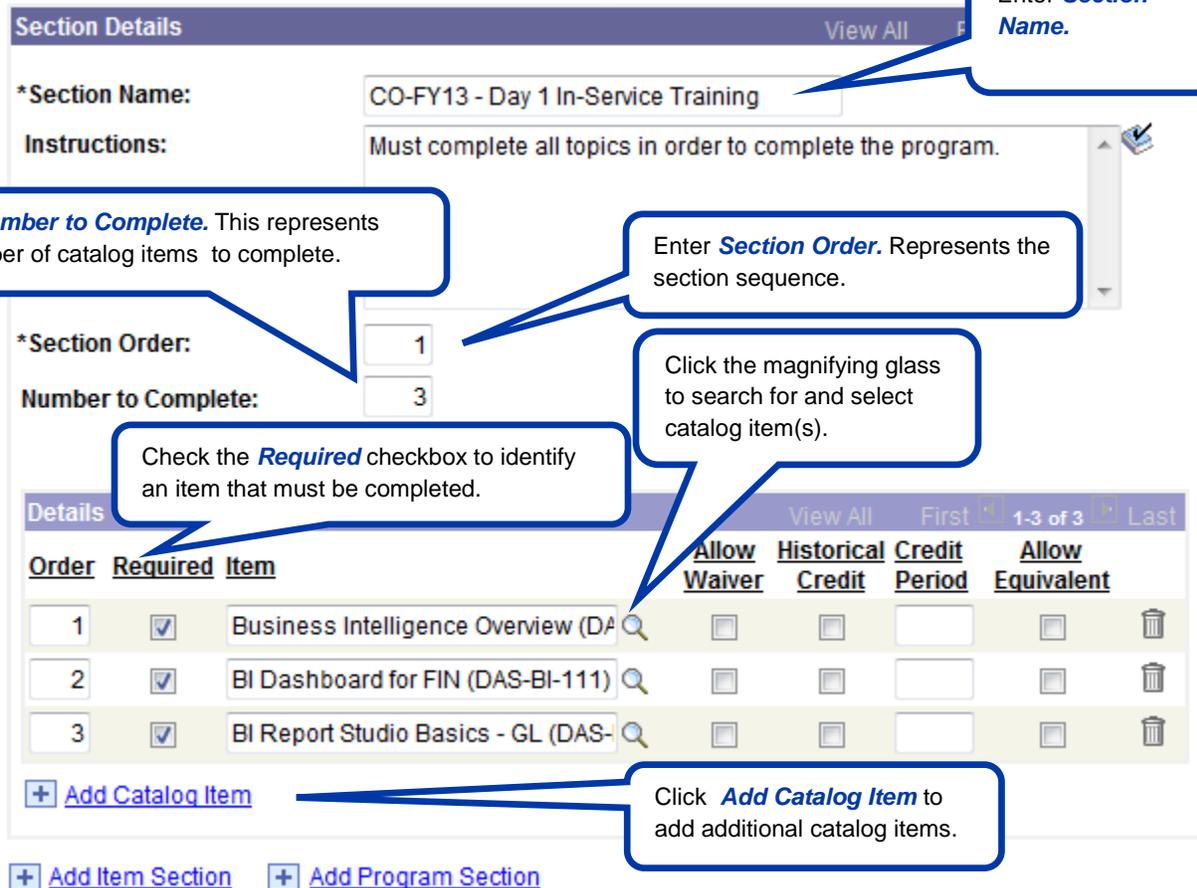
Rule Type:

Cancel

- Must Complete All of the Following Sections
- Must Complete a Subset of the Following Sections

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5. Within **Section Details** enter the following:



Section Details View All

*Section Name: CO-FY13 - Day 1 In-Service Training

Instructions: Must complete all topics in order to complete the program.

*Section Order: 1

Number to Complete: 3

Check the **Required** checkbox to identify an item that must be completed.

Order	Required	Item	Allow Waiver	Historical Credit	Credit Period	Allow Equivalent
1	<input checked="" type="checkbox"/>	Business Intelligence Overview (DA	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
2	<input checked="" type="checkbox"/>	BI Dashboard for FIN (DAS-BI-111)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
3	<input checked="" type="checkbox"/>	BI Report Studio Basics - GL (DAS-	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

+ Add Catalog Item

+ Add Item Section + Add Program Section

Programs can have multiple **Sections**. **Sections** can have multiple **Catalog Items**. For this scenario there is one **Section** with three **Catalog Items** within the **Section**.

Note: The **Number to Complete** must equal the number of **Required** items.

Optional details include:

Allow Waiver – Select to permit a manager or administrator to allow learners to waive this item. With a waiver, learners get completion credit for having the knowledge or experience equivalent to the item without actually having to complete the item. Waivers are granted through the Supplemental Learning component. Leave this field blank, to indicate that the learner cannot waive this item.

Historical Credit – Select to permit the learner to get credit for this item or program if the learner has completed it before registration. The system grants the learner completion credit upon registration, provided that the learner completed the item or program (or the item or program was waived) within the historical credit validity period, as defined in the Credit Period field. Leave this field blank to require the learner to enroll in and complete the item or program regardless of whether the learner previously completed it.

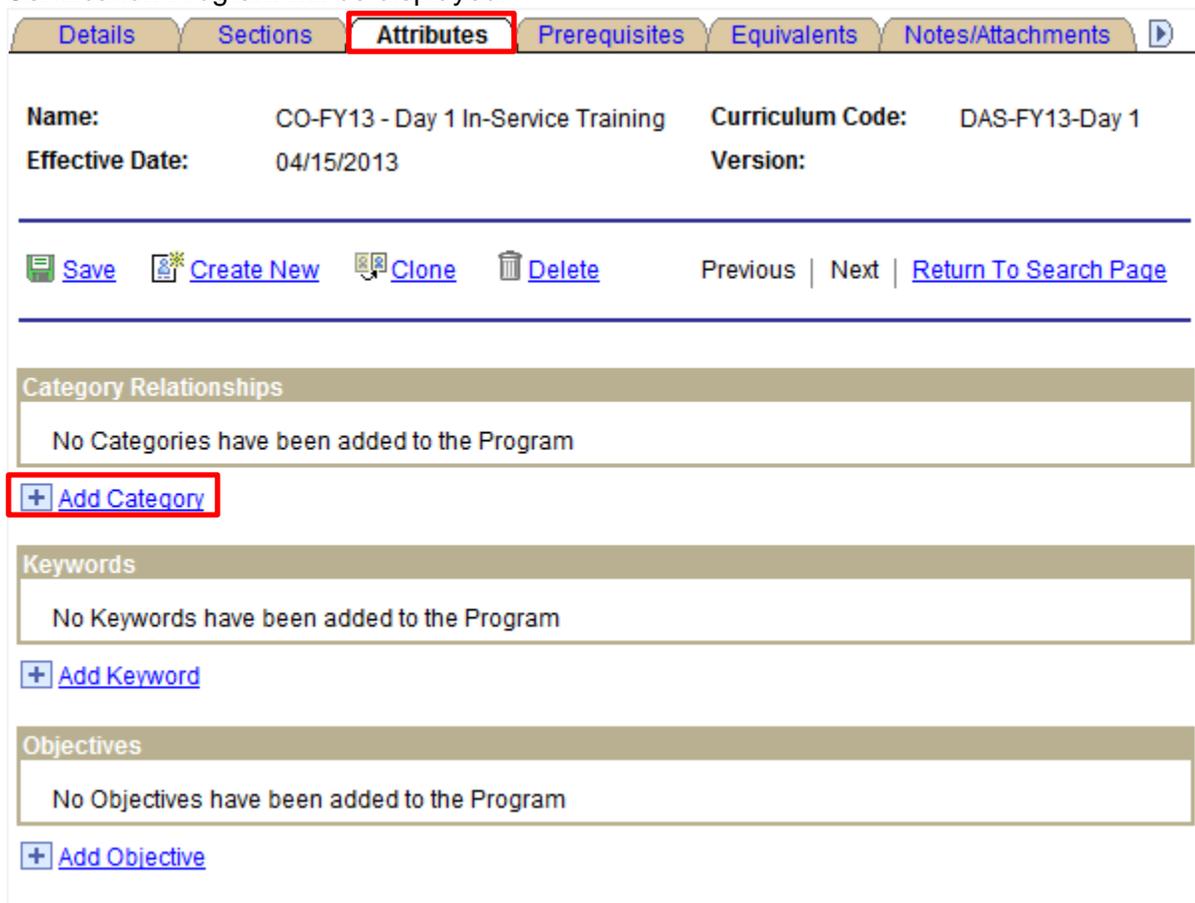
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Credit Period – If you have allowed historical credit, enter the number of days from the date of registration within which the learner must have completed the item or program. For example, if you set this value to 90, then the learner must have completed the corresponding item within the last 90 days before program registration.

Leave this field blank if you want no time restriction on when the learner must have completed the item or program to receive historical credit.

Allow Equivalent - Select if the requirement can be satisfied by completing an equivalent catalog item or program.

- Click **Attributes** tab and click **Add Category** to identify where in the Course Catalog the Certification Program will be displayed.



The screenshot shows the 'Attributes' tab selected in the OAKS system. The main content area displays the following information:

Name:	CO-FY13 - Day 1 In-Service Training	Curriculum Code:	DAS-FY13-Day 1
Effective Date:	04/15/2013	Version:	

Below the information, there are several action buttons: [Save](#), [Create New](#), [Clone](#), and [Delete](#). There are also navigation links for [Previous](#), [Next](#), and [Return To Search Page](#).

The 'Category Relationships' section shows a message: "No Categories have been added to the Program". Below this message is a red-bordered button labeled [+ Add Category](#).

The 'Keywords' section shows a message: "No Keywords have been added to the Program". Below this message is a button labeled [+ Add Keyword](#).

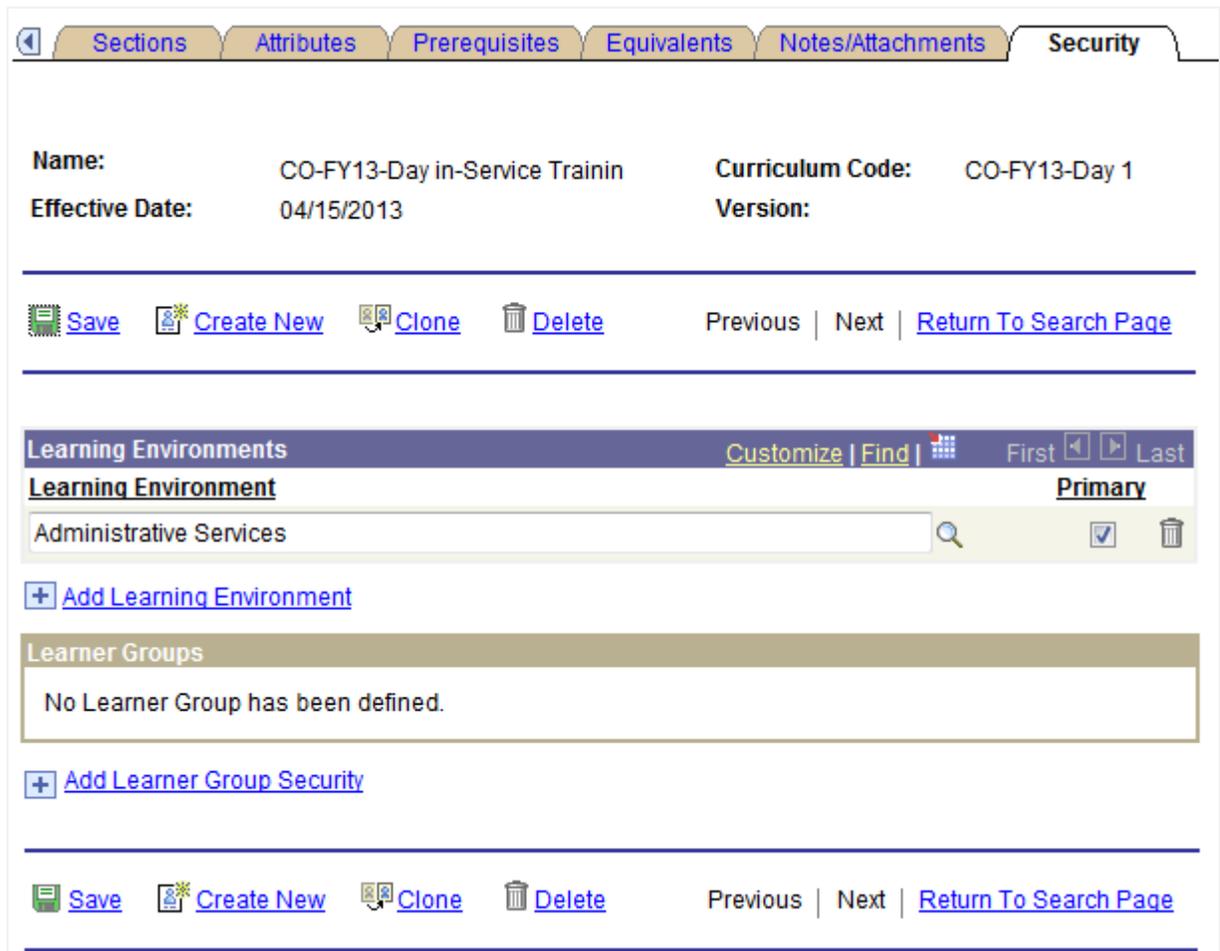
The 'Objectives' section shows a message: "No Objectives have been added to the Program". Below this message is a button labeled [+ Add Objective](#).

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- Click the magnifying glass icon. A list of Categories for your agency will display. Select the desired category. Keywords and Objectives are not currently in use.



- Click **Save**  [Save](#) .
- Click **Security** tab.
Under **Learning Environments**, your agency learning environment will always be displayed as the default and marked as the **Primary**. All agencies must also add the **State of Ohio** learning environment.



- To add the **State of Ohio** learning environment, click  [Add Learning Environment](#) and then use the magnifying glass to bring up a list of learning environments and select **State of Ohio**. Repeat this step if additional learning environments are needed.

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Look Up Learning Environment

Learning Environment: begins with

Short Name: begins with

Description: begins with

[Basic Lookup](#)

Search Results

View All First 1-4 of 4 Last

Learning Environment	Description
Administrative Services	Administrative Services Learning Environment
Office of Budget & Mgmt	Office of Budget & Mgmt Learning Environment
State of Ohio	State of Ohio Learning Environment
Dept. of Rehab & Correction	Dept. of Rehab & Correction Learning Environment

Note: You must click "Save" before adding your Learner Group

- Click **Save**  [Save](#).
- Under **Learner Groups**, click **Add Learner Group Security** to add the specific learner groups that you would like to have access to the Program.

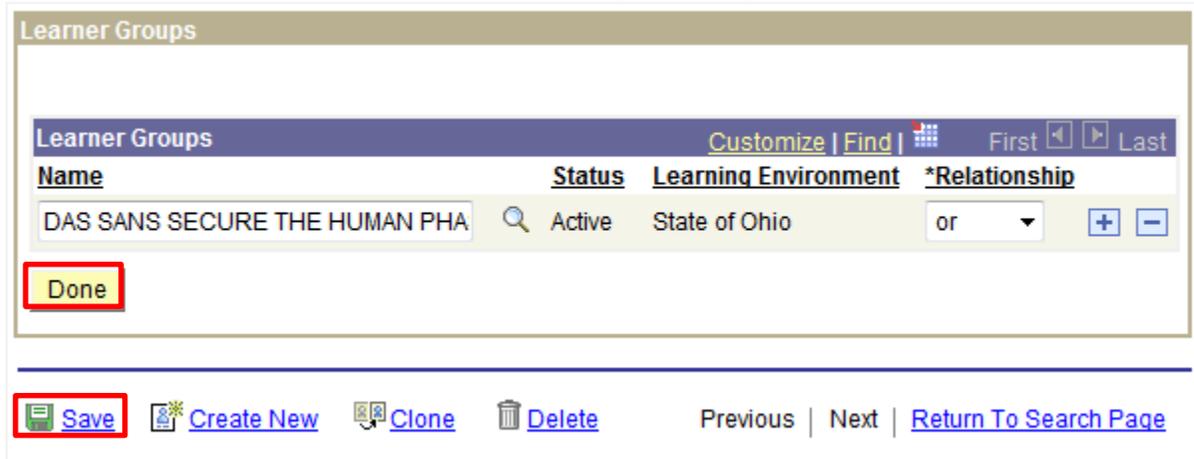
Learning Environments	Customize Find 	First <input type="button" value="◀"/> <input type="button" value="▶"/> Last
Learning Environment Primary		
<input type="text" value="Administrative Services"/>	<input type="button" value="🔍"/>	<input checked="" type="checkbox"/> <input type="button" value="🗑️"/>
<input type="text" value="State of Ohio"/>	<input type="button" value="🔍"/>	<input type="checkbox"/> <input type="button" value="🗑️"/>
+ Add Learning Environment		
Learner Groups		
No Learner Group has been defined.		
+ Add Learner Group Security		

- Use the magnifying glass to search for learner group to be added.

Learner Groups	Customize Find 	First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last
<input type="text"/>	<input type="button" value="🔍"/>	or <input type="button" value="+"/> <input type="button" value="−"/>

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14. Enter your 3 character agency identifier within the **Learner Group Description** and click **Look Up**. This will help narrow your search. Select the Learner Group.
15. The learner group will be displayed. If needed, repeat the steps to add additional learner groups. Click **Done**  when finished adding learner groups.



Name	Status	Learning Environment	*Relationship
DAS SANS SECURE THE HUMAN PHA	Active	State of Ohio	or

Done

Save Create New Clone Delete Previous | Next | Return To Search Page

*Note: Within the Relationship field, Always use **or** when adding multiple learner groups. The last entry should always be **end**. If you only have one group, there is no need to use **end**.*

16. Click **Save**  [Save](#) .

NOTE: The system is set up to “refresh” every hour. Learners will not be able to see the program for enrollment until the next refresh takes place.