

TOTARA LEARN: CREATING A CERTIFICATION

*This is a transcript of a video
on the Totara Academy*



WELCOME TO THIS VIDEO ON CERTIFICATIONS IN TOTARA LEARN.

Certifications are similar to programs, and this video assumes that you're already familiar with how to create a program. The difference is that while programs are normally a one-time event (unless they include a recurring course), certifications have an expiry date and ask learners to return to recertify after a set period of time.

In this video, we'll look at the aspects of doing this that are specific to certifications, but won't repeat the areas covered in the 'creating a program' video.

Like programs, certifications can be accessed from the quick-access menu.

For this example, let's imagine I work for a financial services organisation where there is regulatory compliance training that my staff must repeat every year. I'll add a new certification and quickly fill in the details such as the name of the certification on this tab.

I'll continue by adding my learning content.

You'll notice that this is where certifications and programs start to look different.

We have an **Original certification path** and a **Recertification path**.

The original path is the one the learner takes the first time around, and looks and feels just like a program.

Let's assume I've added the courses I need to my original certification path.

Now it's time to look at my recertification path. This is the path that my learners will take in subsequent attempts at the certificate.

Here you have the option to simply repeat the original path or to specify a different path. This could be a cut down version of the original pathway, or different courses entirely. For example, I might want my recertification path to focus on testing the learner's ability to put their knowledge into practice, supported by some brief recaps of the fundamentals they should already know from the original pathway.

Adding content to the recertification path is done in the same way as programs; using sets to add courses or competencies.

For my recertification path I'll only select the courses that are likely to change each year, either due to changing company policy or changing regulatory requirements.

I'll **Save changes** and confirm that these are the changes I want to make.

So that's my content complete. What is new is this certification tab.

This is where you decide how your certification behaves.

You've got three options when it comes to setting the recertification date, which is when your certification will expire.

A fixed expiry date means that all your learners, regardless of when they complete the original certification path, will be required to recertify at the same time. This might be appropriate if regulations change yearly at a certain time, and your recertification path always includes the latest content.

You could also use the certification completion date. This might be fairest, as it gives all learners the same amount of time, as it recalculates the period each time they take the certification.



You need to be a little careful with this though as dates can drift. If the learner takes their certification a little early, their recertification date for next time is brought forward. Over a few years, you might start to notice this 'drift'.

A more solid date to use is the certification expiry date. This is calculated the first time and then re-used for each recertification. So, if you set yours to recertify every year, it would be due for recertification on the same date each year, even if the learner took it slightly earlier or later in different years (as long as they always recertified in time).

You also need to define how long the certification is valid for. Note that learners must recertify by this time or their certification will expire, and they will have to restart with the original path.

To allow learners to recertify before the expiry date, you'll set a recertification window. This is determined in relation to the expiration date – for example, I might reopen my certification six weeks before the due date to allow plenty of time for learners to complete their learning, allowing for holidays and other time off.

When this window starts, learners receive a notification that they have been enrolled in the recertification and there are courses to complete.

I'll save my changes and confirm I'm happy with them.

So what happens to courses when it's time to recertify? If a course appears in a recertification pathway, the previous completion is archived and the course is reset so it looks to the learner as though they have not completed it before. This includes clearing quiz scores.

There's one thing to be careful of here, and that's including courses in a recertification path that also exist in other programs. If a course is part of a program completion, and the course is reset during the recertification window, the program they had previously completed will be marked as incomplete until they re-take the course.

So how does this look to a learner?

If I've been assigned to a certification (or a recertification period has become active) I'll see a notification on my dashboard. I'll probably have received an email message too, depending on how notifications are set up on your site.

Learners can also browse and search for certifications visible to them through the catalogue, then ask their manager for approval.

Let's take a look at the certification we just created.

So that's creating certifications in Totara! If you haven't already, why not watch the video on programs?

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