



Certification Requirements Version 2

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Steering Committee

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April 19, 2019

Table of Contents

TABLE OF CONTENTS	2
ELIMINATE “CERTIFICATION TYPE” FROM LMS ASP	3
BUILD NEW CERTIFICATIONS PAGE	5
<i>Page Header</i>	<i>5</i>
<i>Display Selection Menus</i>	<i>5</i>
<i>Certification Status</i>	<i>5</i>
<i>Certification Rule List</i>	<i>6</i>
<i>Actions</i>	<i>6</i>
<i>Percent Complete Graphics</i>	<i>6</i>
TEAM CERTIFICATIONS PAGE	8
<i>Summary Information</i>	<i>8</i>
<i>Filters</i>	<i>8</i>
<i>Results</i>	<i>8</i>
<i>Training Detail Expando</i>	<i>9</i>
<i>Actions</i>	<i>9</i>

Eliminate “Certification Type” from LMS ASP

There are only a few functional differences between a Certification and Curriculum, defined by “Certification Type”, in the LMS ASP.

- Curriculums display in Skill Profile page. Certifications are hidden from the Skill Profile matrix.
- Students can self-assign Goals for any Curriculum displayed in Skill Profile page. Certifications require the LMS Portal Administrator to open their LMS Information page and flag setting “Self-Assign Goals” true.
- Our new “Self-Assign Goals” wizard only returns Certifications. Curriculums are excluded from type-ahead menu on Training Goals step.

Instead of embedding these display and goal assignment functions into the “Certification Type” definition, we want to eliminate that concept from LMS ASP, and make all these configuration options explicit within the Add/Edit Certification tool.

This project will enhance the Add/Edit Certification page in the following ways:

1. Remove the required field: *Type
2. Create a new section header called “Display to User”
3. Under new section header, add the following configuration fields and functionality.
 - a. Certifications page: [checkbox]
 - i. True = Display (Default)
 - ii. False = Hide
 - b. Skill Profile page: [checkbox]
 - i. True = Display (Default)
 - ii. False = Hide
 - iii. NOTE: Certifications must have defined Skill Profile, Skill Area, and Skill Level to display. If Skill Profile section is left blank, the certification will not display, even if setting is flagged true.
4. Move existing settings to bottom of new “Display” section, and retain current functionality.
 - a. Display: [checkbox]
 - i. Rename to “Training History page:”
 - b. Enable Printable Certificate: [checkbox]
 - i. Rename to “Certificate of Completion:”

Example of enhancement design below.

Add / Edit Certification

Add or edit a certification by filling out the fields below and clicking Submit. An asterisk [*] indicates a required field.

Owner Organization:

Language:

*Name:

*Description:

Status: Active
 Inactive

*Program:

*Position Group(s): Select Position Group(s)
 Customer Service
 TESTING

*Certification Level:

Display to User

Certifications page:

Skill Profile page:

Training History page:

Certificate of Completion:

Skill

*Skill Profile

Skill Area

Skill Level ?

Primary Rule(s):

Add Primary Rule(s)

Primary Rule	Action
CS Basics	<input type="button" value="Move Up ▲"/> <input type="button" value="Move Down ▼"/> <input type="button" value="Remove ×"/>

Build New Certifications Page

Build an Angular page to replace the classic student *Certifications* page (/certification/user/cert_view_status2.aspx). The new *Certifications* page provides students a comprehensive view of their status in each assigned Certification, plus the ability to drill down into rule requirements to enroll and launch coursework.

Page Header

Title: Certifications

Icon: graduation-cap

Display Selection Menus

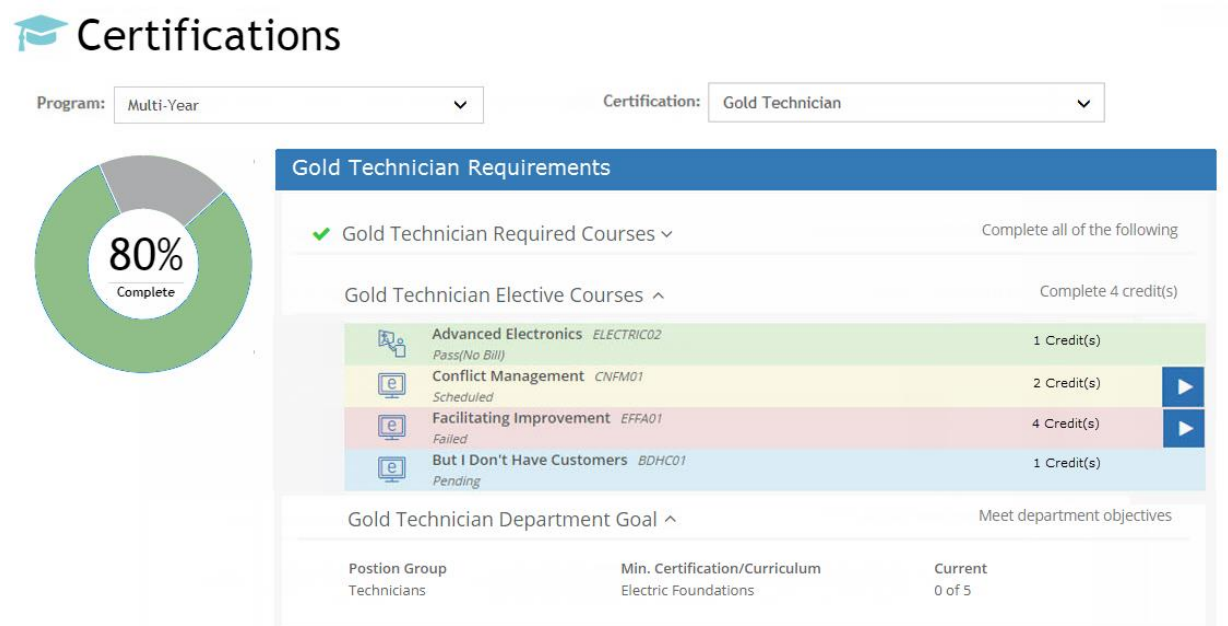
Page will display two drop-down menus that provide only active records in list. Values in menu are scoped to user's Position Group and are sorted alphabetically.

1. Program: list only those Programs that house the Certifications user is eligible to achieve. Program selection will drive the list of values that populate in Certifications menu below.
2. Certifications: list only the Certifications user is eligible to achieve, within the selected Program. Certifications set with "Display to User > Certifications Page" flagged FALSE should also be hidden from menu.

Certification Status

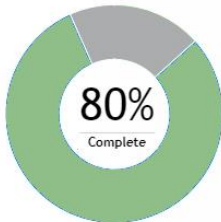
There are two visual elements that help users understand their current Certification status.

1. Certification Rule List
2. Percent Complete Graph



Certifications

Program: Multi-Year Certification: Gold Technician



80% Complete

Gold Technician Requirements

- ✓ Gold Technician Required Courses Complete all of the following
- Gold Technician Elective Courses Complete 4 credit(s)

Course Name	Code	Credit(s)	Status	Action
Advanced Electronics	ELECTRIC02	1 Credit(s)	Pass(No Bill)	
Conflict Management	CNFM01	2 Credit(s)	Scheduled	▶
Facilitating Improvement	EFFA01	4 Credit(s)	Failed	▶
But I Don't Have Customers	BDHC01	1 Credit(s)	Pending	
- Gold Technician Department Goal Meet department objectives

Position Group	Min. Certification/Curriculum	Current
Technicians	Electric Foundations	0 of 5

Certification Rule List

Populate all the rules for default Certification displayed in menu, then display user's current status in each. If user has met the requirement, rule should display collapsed with green checkmark in header. Rules user has not met should be expanded by default.

Courses in completion rule list should display same as *Courses To Complete > Required* page, plus be color coded according to user's current transcript status:

- Green = Attend(Pass), Attend No Bill (Pass)
- Yellow = Scheduled, Launched, On Interest List
- Red = Fail, Cancel, Incomplete, No Show, Ineligible
- Blue = Pending (Prerequisites, Manager Approval, etc.)
- Gray = Not Enrolled

Click course icon to expand details. Course Names link to their Course Details page.

Add other rule types to list as met or not met.

- Green = Met
- Gray = Not Met

Actions

Course action buttons should display same as *Courses To Complete > Required* page, based on user's transcript history, interest list, and course settings.

- Enroll/Launch
- Cancel Enrollment/Cancel Interest
- Self-Certify Completion
- Download Calendar.ics file
- Information

If portal is set to allow "Self-Assign Goals" on *LMS Information* page, display **[+Goal]** button in upper right corner. Click the [+Goal] button to open Assign Goals wizard, where user can self-assign a Certification Goal or Cancel out as usual.

Add a data **Export** button with Download icon, allowing students to export their certification requirements and status into an Excel file on demand.

Percent Complete Graphics

The same "Certification Progress" bar from the *Skill Profile* page will display as a donut at left of Certification Rule List. This donut graph displays percent complete according to the number of rules user has met out of total rules required. Ignore requirements for which user meets Not or Exempt rules. The goal here is to show continual progress as user meets each rule requirement, always reflecting their highest achievements within the rule set. Start from the bottom and work up the rule chain to determine "Progress" percent complete: Generic Rule average → Primary Rule average → Certification percent complete

- Calculate percent complete for **Generic Rules** based on type:
 - Completion – Number of requirements met/total number
 - Elective –
 - Number of Requirements Completed: Number of requirements met/X
 - Credits Passed: Number of course credits met/Y
 - Department Objective –
 - Percentage: Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
 - Count: Number met/Z
 - Individual Performance – Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
 - Location Performance – Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
 - Top Performance – Do NOT calculate percentage complete, credit is all or nothing (0 or 1) at this level.
- Each **Primary Rule** holds equal weight for certification completion.
 - One Of: Average the percent of all Generic Rules, display highest percentage complete
 - All Of: Average the percent complete of each Generic rule, display results
 - Assume a Certification that requires five Primary rules. Progress bar will move 20% for each Primary rule Met.
 - One Of = Highest percentage complete
 - All Of = Average of Generic Rule percentage
- Met all rules = 100% Complete

If user selects a Certification that they have already achieved, "Certification Progress" bar described above should be replaced with a "Level Achieved" trophy, as pictured below. Display in center of trophy the Certification Level in view.

Certifications

Program: Certification:



Gold Technician Requirements	
✓ Gold Technician Required Courses ▾	Complete all of the following
✓ Gold Technician Elective Courses ▾	Complete 4 credit(s)
✓ Gold Technician Department Goal ▾	Meet department objectives

Team Certifications Page

Build an Angular page to replace the classic *Department Certification Status* page (/certification/user/cert_managed_students_view2.aspx). The new *Team Certifications* page allows managers to review who on their team has achieved which level of Certification, has Goals assigned, and assign goals accordingly.

Summary Information

Assigned: Sum total from results table the number of certification goals in "Assigned" status

Achieved: Sum total from results table the number of certification transcripts in "Achieved" status

Filters

Two types of filters allow managers to tailor certification results list. Filters only return active LMS records in list, and apply first match values on page load.

1. Single select drop-down menus are required (always apply).
 - Program – Default first in list
 - Position Group – Default first in list
2. Multi-select filters will reset to *default values every time user changes selection in either of the required menus above.
 - a. Organization – Scoped to user's organization tree.
 - b. Users – Scoped by all the above filters.

*Depending on which Reporting Hierarchy is enabled, one of the following two filters are applied as default.

- **Position Code:** Organization > In Exact Organization > [logged-in location]
- **Person-to-Person:** User > Directly Reports To > [logged in user]

Results

Display table with a row for each certification returned by filters. Each certification row will display the number of associated goals assigned and number of transcripts achieved. Viewing manager is included in list.





Refresh results every time user applies new filters.

- A. Column 1: Certification Icon
- B. Column 2: Certification Name, Program
 - Certification Name will link to Certification Details page in new tab
 - Click icon to expand Training Details described below.
- C. Column 5: Action

Training Detail Expando

Click certification icon to see the list of users with the certification Assigned as goal, their Certification Progress, and who has Achieved it. Viewing manager is included in list.

- Column 1: First Name, Last Name, Username
- Column 2: Assigned – display the star icon for users who have the certification assigned as a Goal. Hover text = Date Assigned
- Column 3: Certification Progress – Same graph from end user’s *Certifications* page. Click graph to open “User Certification Status” modal described below.
- Column 4: Achieved – display trophy icon for users who have certification transcript in Achieved status (exclude Revoked). Hover text = Date Achieved

Dealer Website Certification - North Region			
Ongoing Certification + Goals			
	Assigned	Certification Progress	Achieved
Daniel Roberts DemoRobinson		100%	
Denver AdminRole DENVERADMIN2017		70%	
Michael Cera FRENCH_12915		100%	

Actions

Add Goal – Button display will depend on LMS Information page “Set Team Goals” flag. When enabled, opens *Assign Goals* tool with selected Certification prepopulated on “Training Goals” step.

User Certification Status – Click “Certification Progress” bar to open user’s *Certifications* page in modal window. (Replaces classic page: /certification/user/cert_view_status.aspx)

- Rules user has met should be collapsed with green check icon. Can be expanded for detail.
- Rules user has not met should be expanded by default, providing to-do list
- Course records in list should display and behave same as user’s *Certifications* page. See design mockup below.

Certification Status: Dan Gilbert







Gold Technician Requirements

✓ Gold Technician Required Courses ▾

Complete all of the following

Gold Technician Elective Courses ▲

Complete 4 credit(s)

	Advanced Electronics <i>ELECTRIC02</i> <i>Pass(No Bill)</i>	1 Credit(s)	
	Conflict Management <i>CNFM01</i> <i>Scheduled</i>	2 Credit(s)	
	Facilitating Improvement <i>EFFA01</i> <i>Failed</i>	4 Credit(s)	
	But I Don't Have Customers <i>BDHC01</i> <i>Pending</i>	1 Credit(s)	

Gold Technician Department Goal ▲

Meet department objectives

Postion Group	Min. Certification/Curriculum	Current
Technicians	Electric Foundations	0 of 5

Gold Technician Department Goal ▲

Meet department objectiv

Postion Group	Min. Certification/Curriculum	Current
Technicians	Electric Foundations	0 of 5