



Team Certification Requirements

Version 4

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Steering Committee

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Calculate and Store User's Certification Progress as Percent Complete

On the *Team Certifications* page, a new "Certification Progress" bar will display for each user who has an assigned or achieved certification. We want to calculate and store the number of certification rules each user has met out of total rules required, then use stored data to display a percent complete/100. Ignore requirements for which the 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

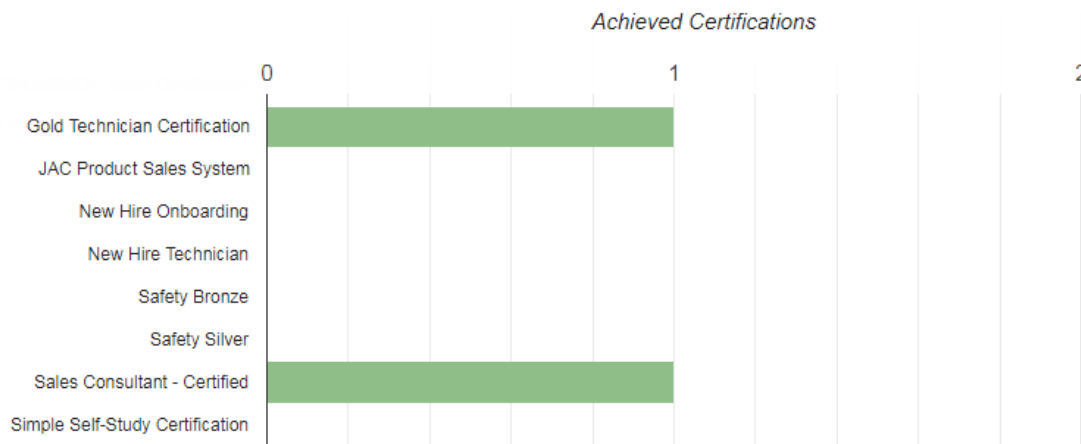
Team Certifications Page

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 new goals accordingly. User should see his/her own records in results list and summary graph.

Summary Information

Horizontal bar graph displays the total number of users (x axis = number of transcripts in "Achieved" status) that have achieved each certification (y axis) in results table.

Title: Achieved Certifications



Filters

Standard Filter component offers six single-select criteria:

1. None – All
2. Organization – Scoped to user's organization tree
3. Position – Scoped to user's Position Hierarchy; unscoped in Person-to-Person portals
4. Position Group – All active records
5. Program – All active records
6. User – Scoped by organization and reporting trees.

*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

Results table displays 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.

Column 1: Status – Certification Icon (hover text: Details). Click icon to expand Training Details described below.

Column 2: Certification – Certification Name, Program

Column 3: Goals – Number of Goal transcripts in Assigned status





Column 4: Achieved – Number of Certification transcripts in Achieved status (exclude Revoked)

Column 5: Action – Add Goal button provides functionality described below.

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: Goal – display the star icon for users who have the certification assigned as a Goal
- Column 3: Certification Progress – Use pre-calculated certification progress to display percent complete/100
- Column 4: Achieved – display trophy icon for users who have certification transcript in Achieved status (exclude Revoked).

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%		

Action

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

Add Certification 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.