Overview of Totara and Moodle
Re-Introduction to Courses (as some might not have done much)
Add new course content
Creating feedback surveys
Creating quizzes
Face to face session set up
Course Completion
Activity Completion and Restrict Access

For Admins only:
[Creating audiences
Attach training to audiences
Learning Plans (certifications)]

- Overview of Totara and Moodle
- Courses
  - Course Sections
  - Course Settings Page
  - Adding a file - Drag and Drop
  - Adding a file - Moodle Filepicker
- Feedback Activity
  - Questions and submission settings:
  - After submission
  - Feedback admin screen
  - Edit questions
  - Add a Label type
  - Templates
  - Analysis
  - Show responses
  - Show non-respondents
- Setting up the Question bank and adding a Quiz
  - Create a quiz
  - Add questions to a quiz
  - Quiz Scoring
- Face to Face
  - General
  - Manager reservations
  - Calendar options
  - GOSH Minimum Cancellation Time
  - Face to Face activity screen
  - Add a New Session
  - General
  - Result of adding a session
  - Managing Enrollments
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- Attendees
- Approval Required
- Message Users
- Wait-listed session
- In case of overbooking
- Cancel booking
- Bulk upload Face to face sessions
- View Session Calendar
- General Default Settings
- Messages
- Room Setup

Course Completion

Activity Completion and Restrict Access

- Activity Completion
- Restrict Access

Certification

- Manage Certifications

Overview of Totara and Moodle

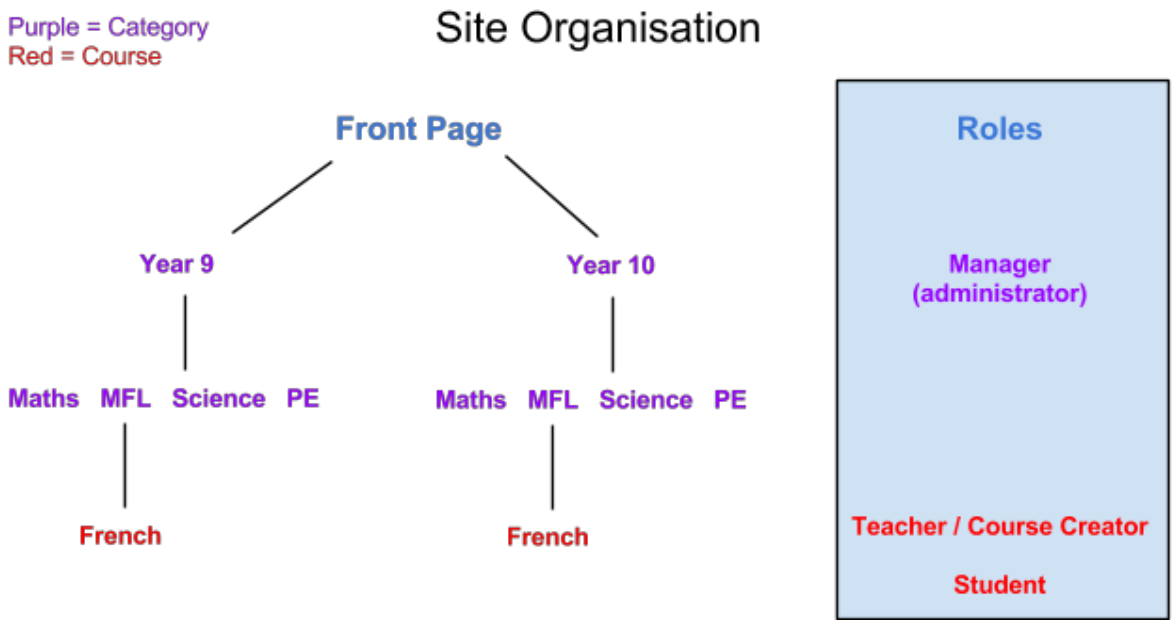
Moodle: Learning Management System
Totara: Moodle plus HR functionality
- Hierarchies - Organisations, Positions, Users
- Reports
- Audiences - Method of building groups of people according to multiple criteria

Courses

Hierarchy

Moodle is structured hierarchically into categories (folders or containers) and courses (interactive content areas like this one).
Roles define what a user can do in each category or course:

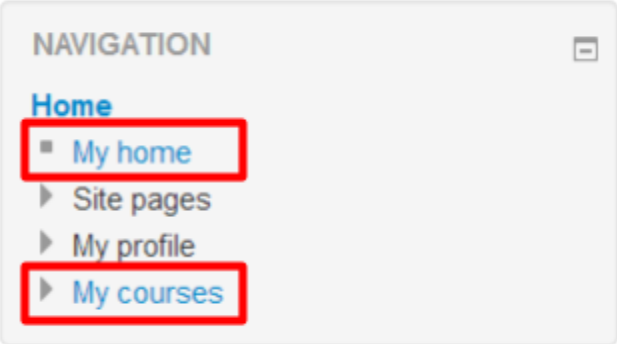
Managers administer a category
Teachers can create courses, add and grade activities
Students can submit work



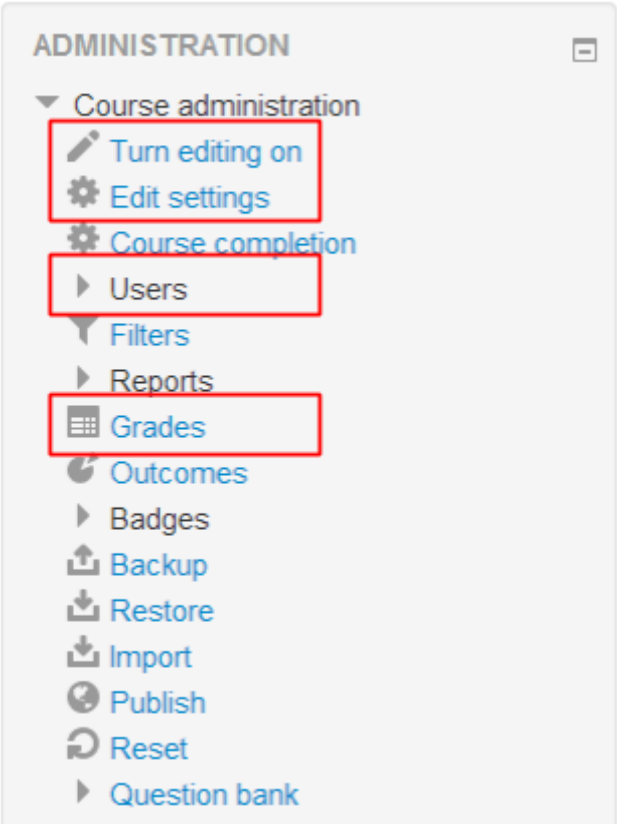
Navigation

Blocks

Blocks are where you can access navigation and settings.
They are context sensitive. What they show depends on where you are.
Navigation block: My home and My courses display the courses you are enrolled on.



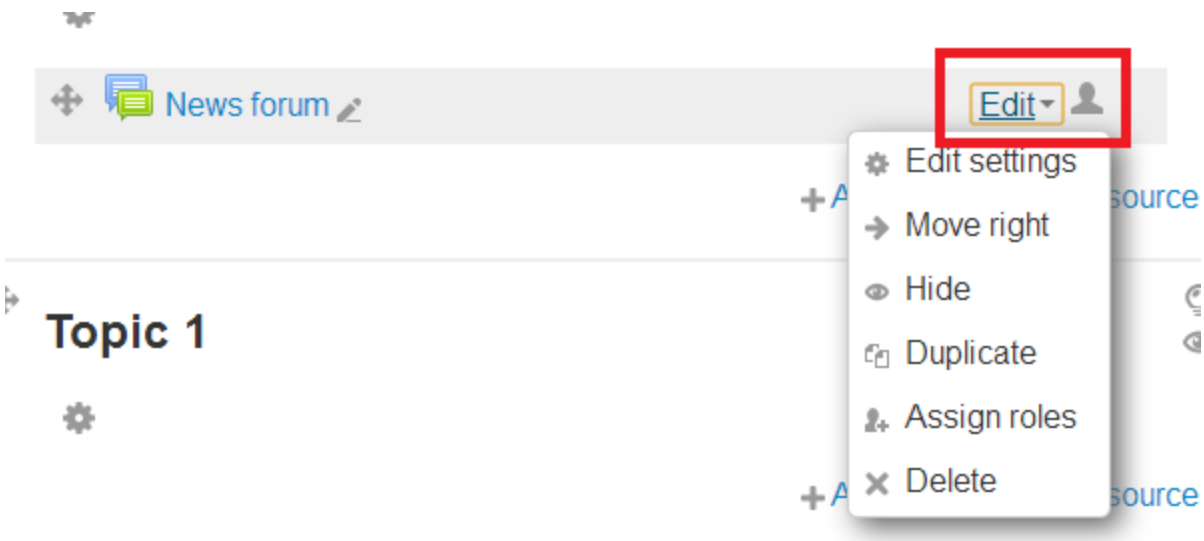
Course Administration: Contains all of the links to control how your course works. Look for Turn editing on, Edit settings, Users and Grades



Edit mode

To add content and activities to a course, click the Turn editing on button.

With editing turned on, you can access the settings for resources and activities on the moodle course page:



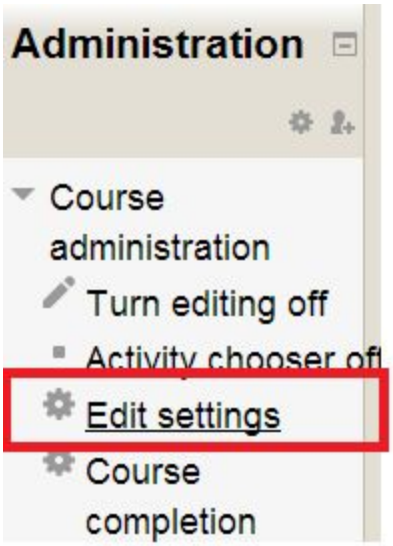
Course Sections

The course page is divided into sections
Each section is where you can group activities and resources around a topic or theme

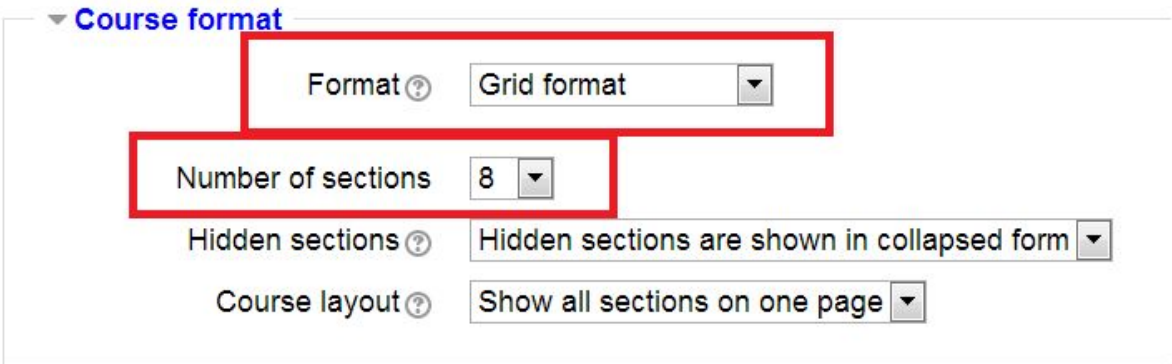
Topic Layout

Course Settings Page

Administration block > Course administration > Edit settings



Scroll down until you see:



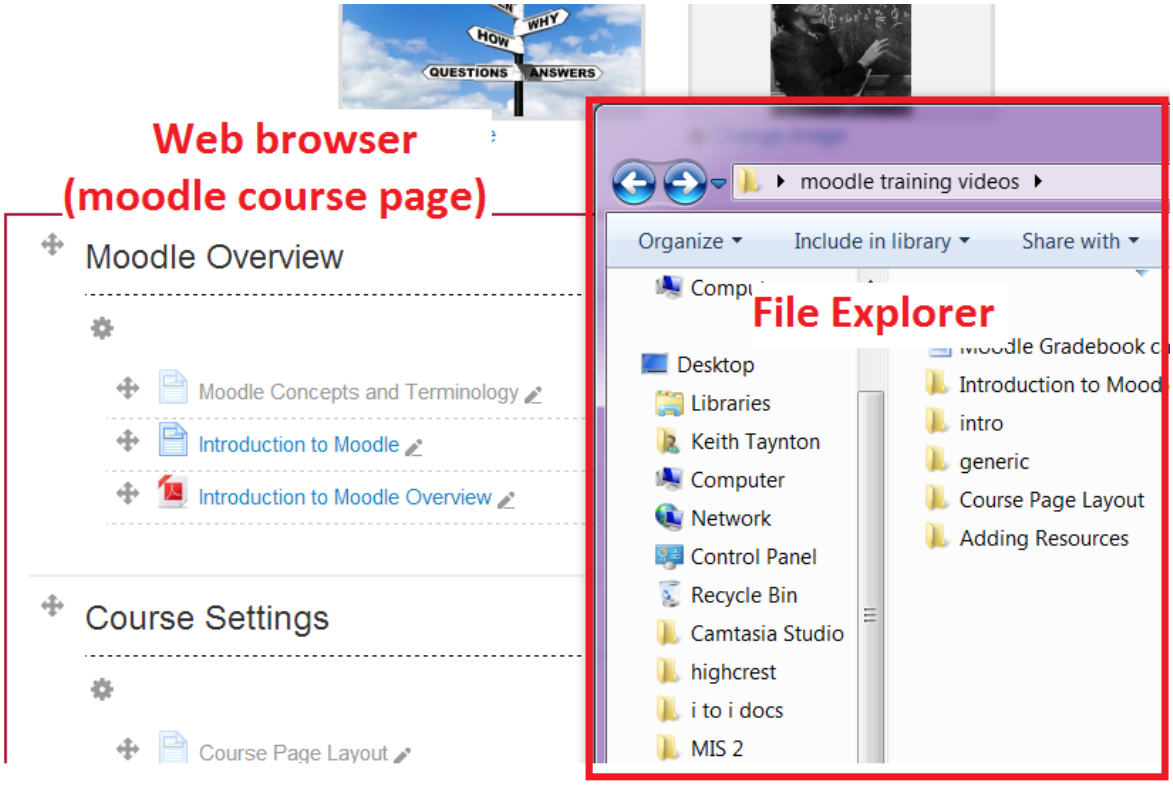
Adding a file - Drag and Drop

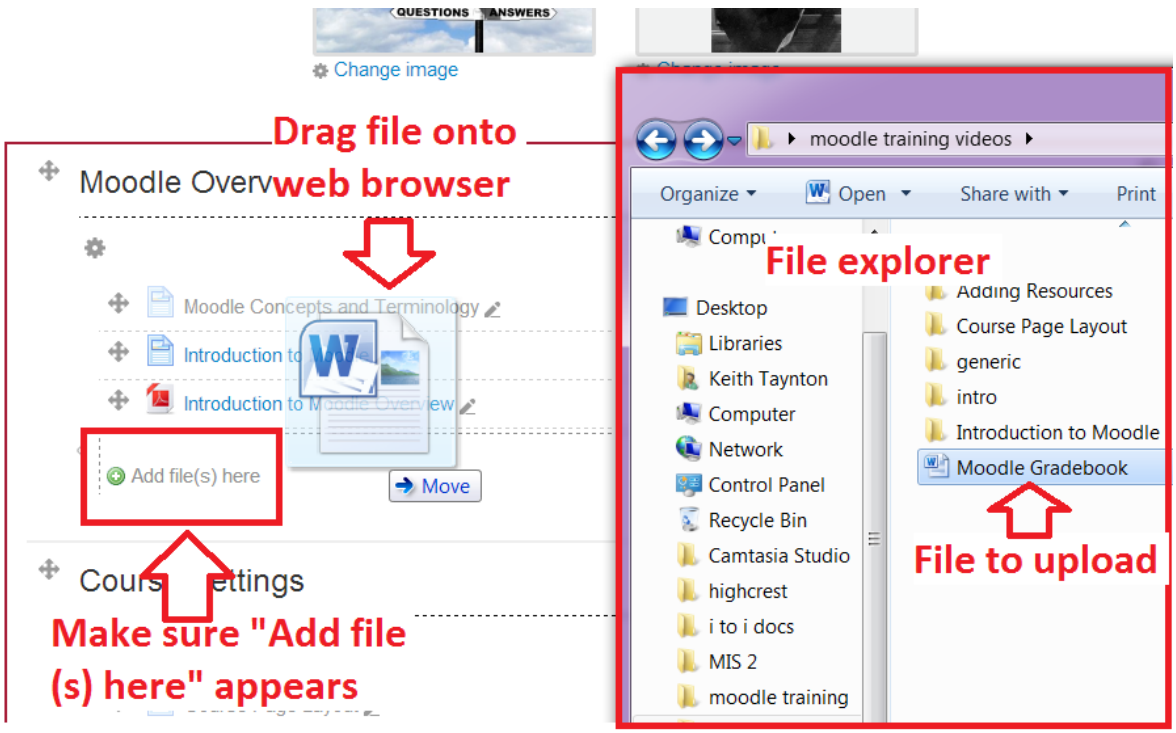
Navigate into your course, and turn editing on.

Drag and drop (Internet Explorer 10, Chrome, Firefox)
You can drag and drop files from your windows folders (C: drive, network share etc) directly onto the course page.

Open the computer's file explorer (My computer, network share etc) and navigate to the files you want to upload
Put the file explorer on top of the browser window so both are visible at the same time
Drag and drop files from the file explorer onto the course page.
To do this, click on the file once and hold the button, move it over to the web browser window.
When “Add file(s) here” appears let go of the mouse button and the file will upload.
If the “Add file(s) here” doesn’t appear then the file will not upload.

See the screenshots and video for more information.





Adding a file - Moodle Filepicker

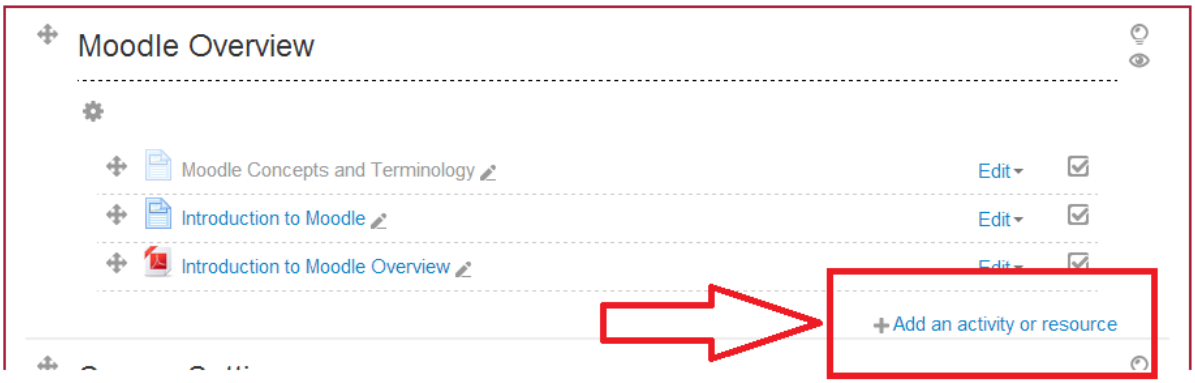
The filepicker is Moodle's version of your computers file explorer (My documents etc)

You can use this to access many different types of file including searching for and using video (youtube etc) and pictures.
This section covers how to upload a file using the filepicker. For more information see the Using the filepicker page.

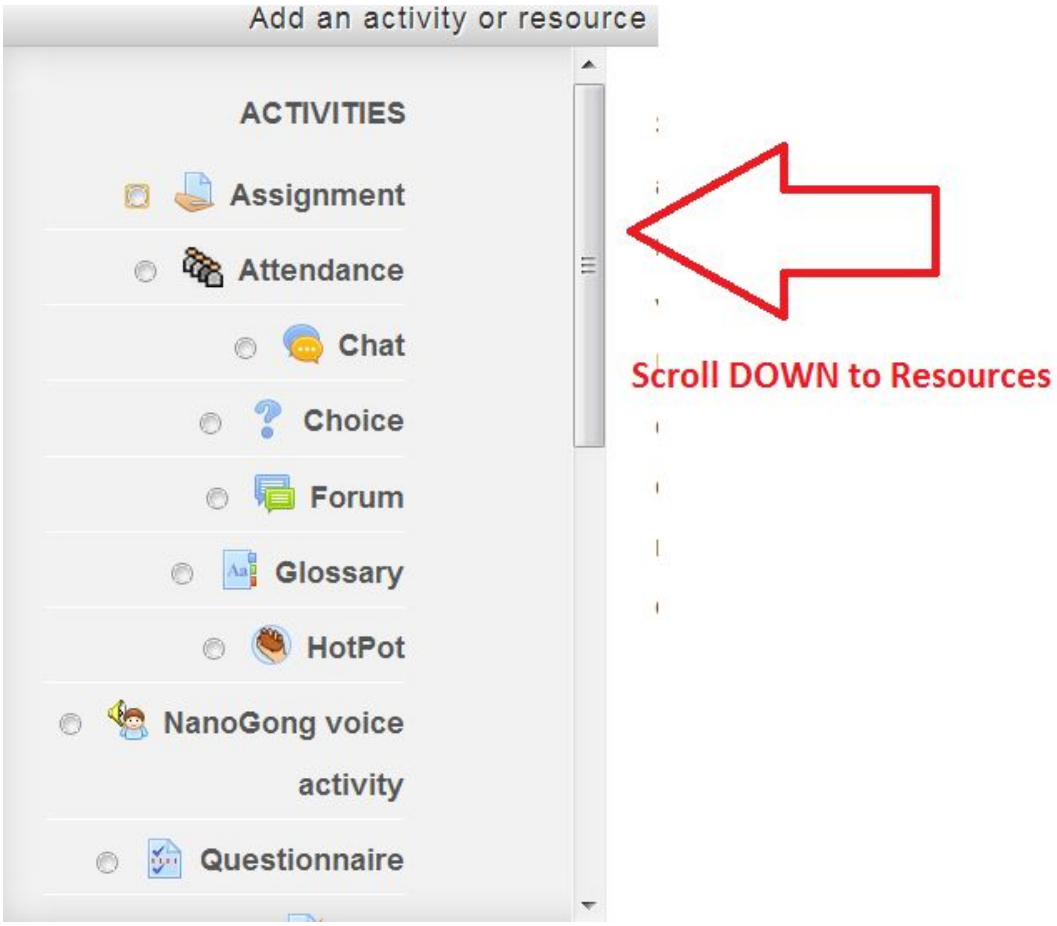
How to upload a file using filepicker

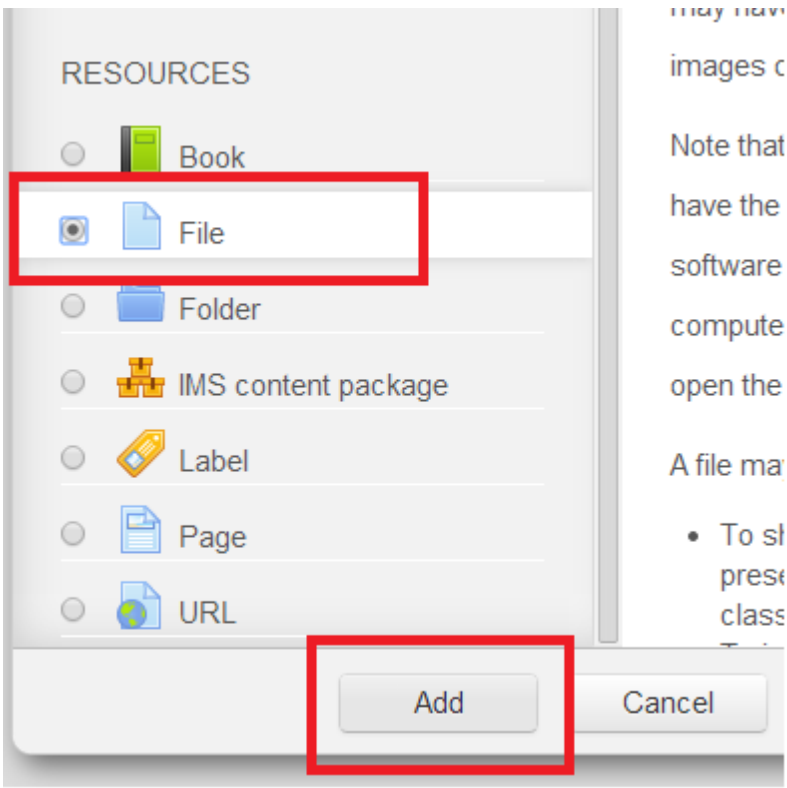
Navigate into your course, and turn editing on.

Scroll to your topic section and click the link Add and activity or resource

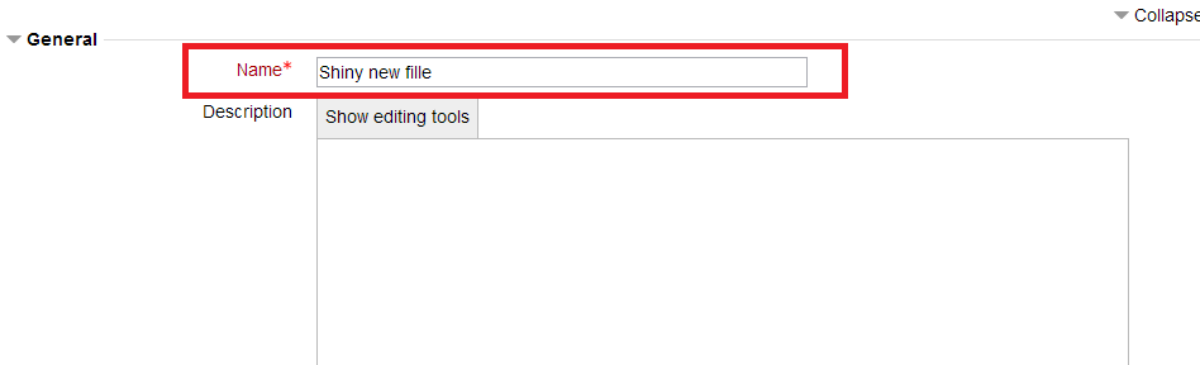


This brings up the resource chooser. Scroll to the bottom and click onFile, the Add

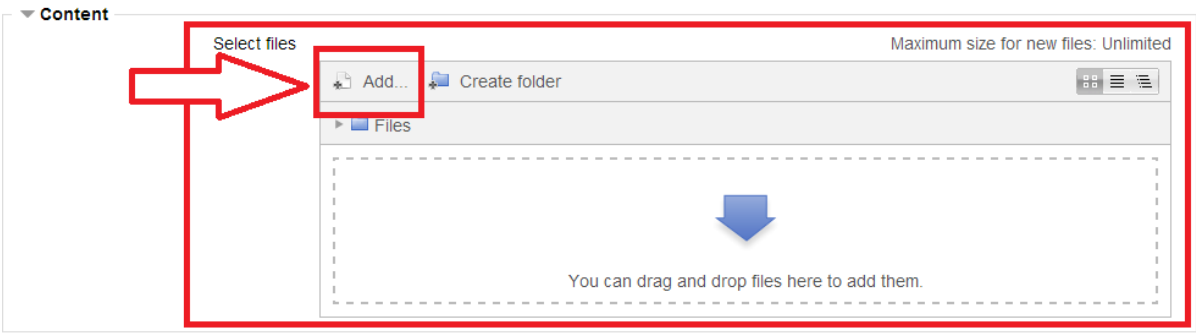




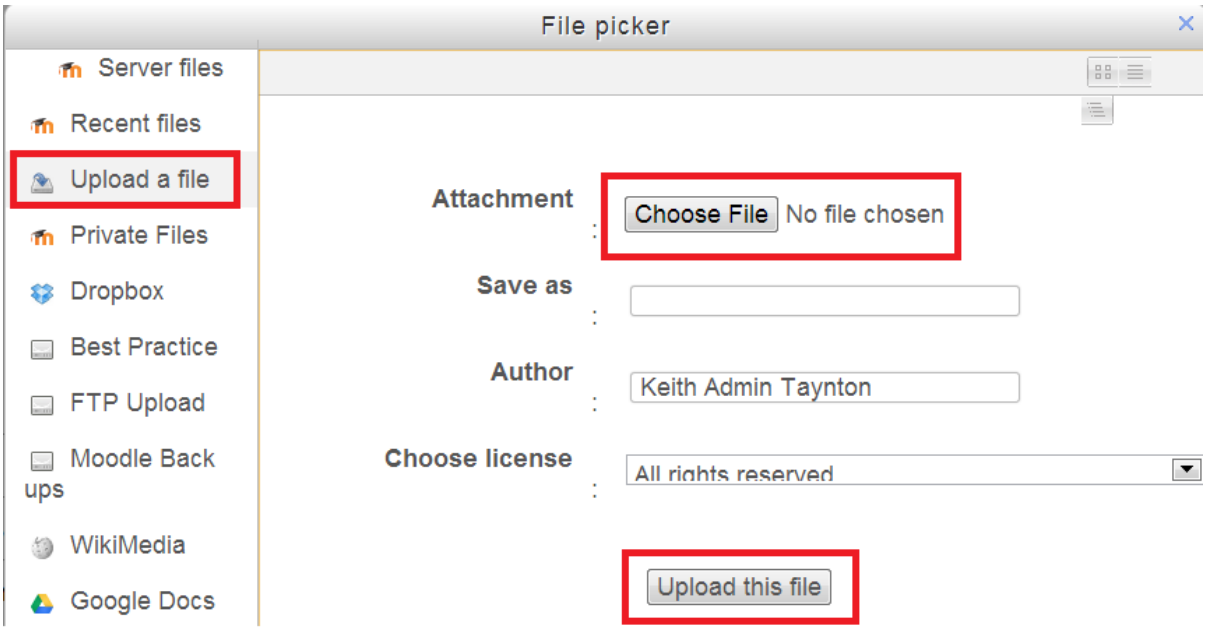
Enter a name for the file. This will be the name of the link that users click on to access the file.



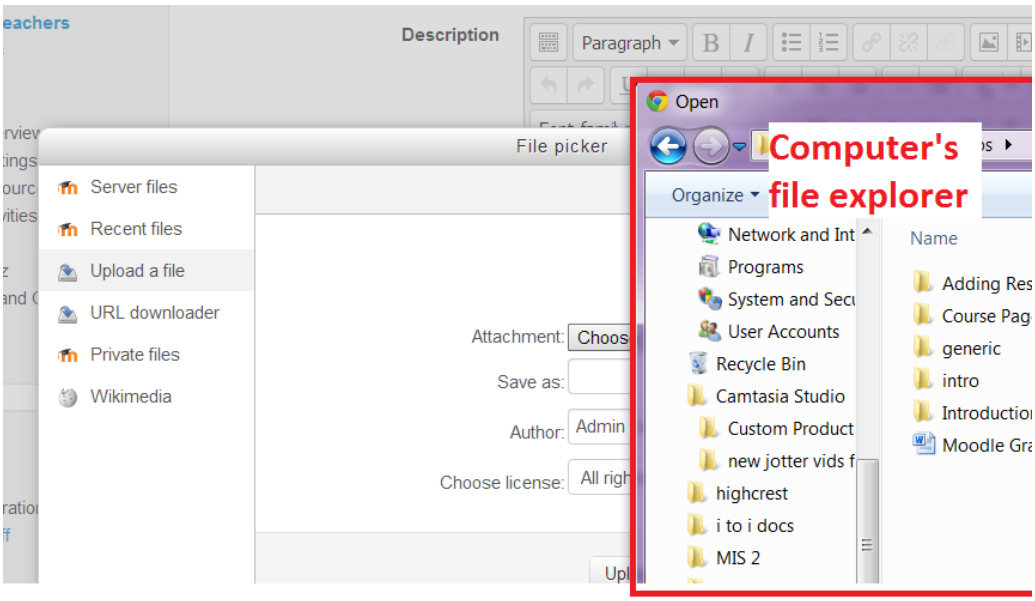
Click on Add. This brings up the filepicker.



The filepicker has many options. To upload a file, click Upload a file, then click Choose File.



This opens up your computer's file explorer. Select the file you want and click Open.



Then on the Moodle filepicker click Upload this file. The file will upload and display on the topic section.

Feedback Activity

General

Name* Feedback

Description* Paragraph

About the course

Path: p

Display description on course page

Availability

Allow answers from 22 July 2014 11 30 Enable

Allow answers to 22 July 2014 11 30 Enable

Question and submission settings

Record user names Anonymous

Allow multiple submissions No

Enable notification of submissions No

Auto number questions No

After submission

Show analysis page No

Completion message Paragraph

Path: p

Generate Grade No

Link to next activity

Availability Open and close dates

Questions and submission settings:

Record usernames: Anonymous or record names

Allow multiple submissions If enabled for anonymous surveys, users can submit feedback an unlimited number of times.

Enable notification of submissions If enabled, teachers will receive notification of feedback submissions.

Auto number questions Enables or disables automated numbers for each question

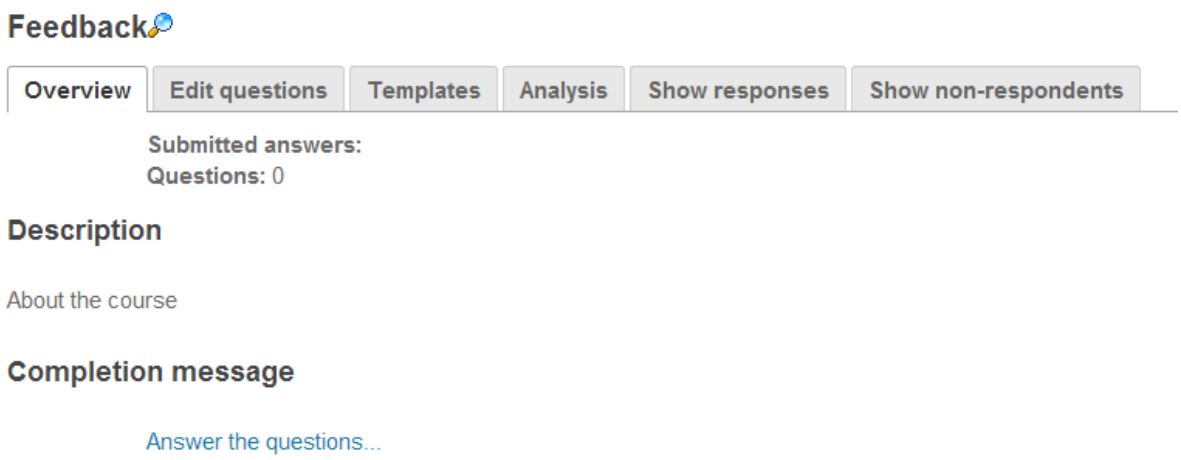
After submission

Show analysis page

Completion message If you want to use this feedback as a prerequisite for a conditional activity - requiring that the feedback must be completed before that conditional activity becomes available - then you must set Generate Grade to Yes

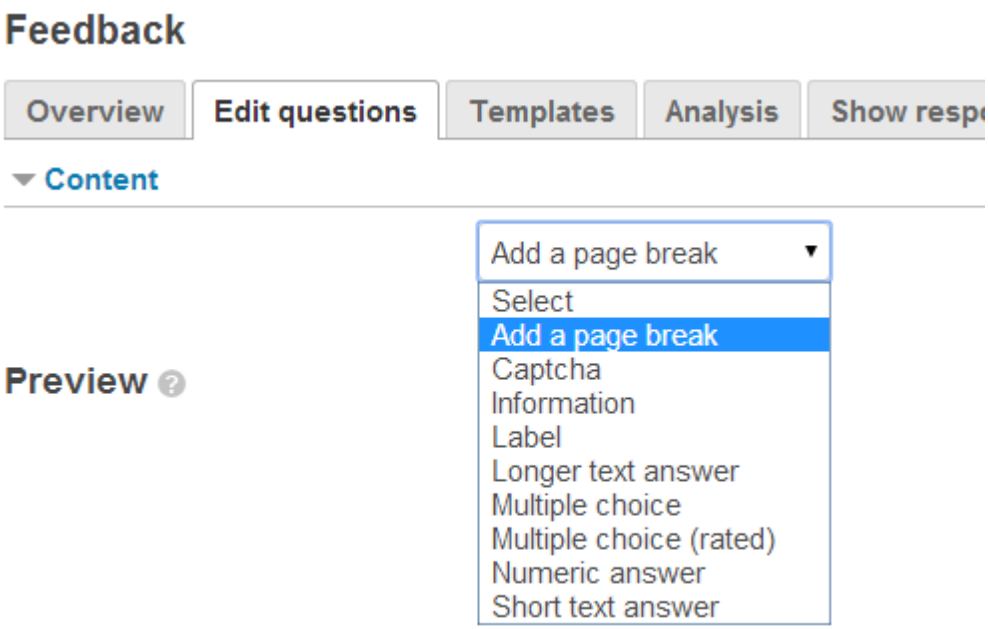
Link to next activity After submitting the feedback, a continue button is displayed, which links to the course page. Alternatively, it may link to the next activity if the URL of the activity is entered here.

Feedback admin screen

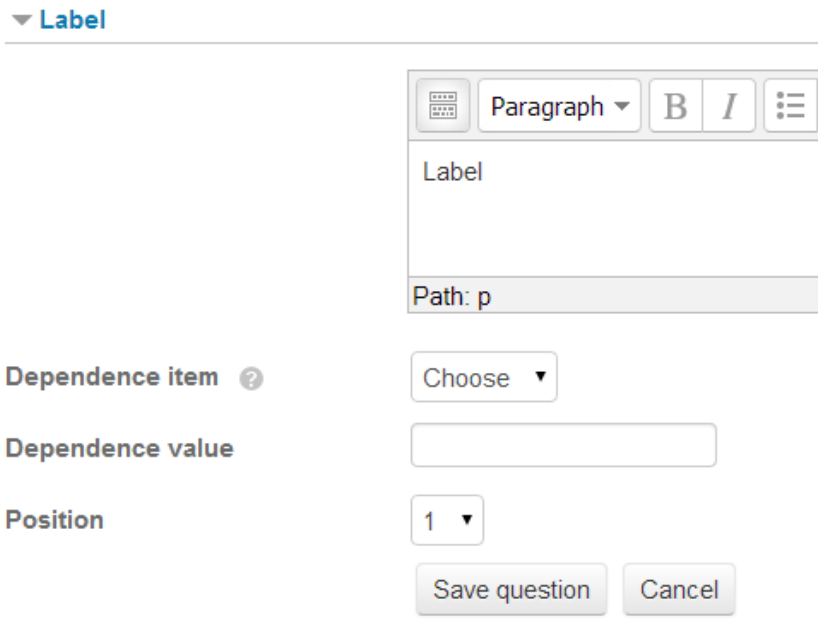


Edit questions

Click Edit then choose a question from the dropdown to add a question



Add a Label type

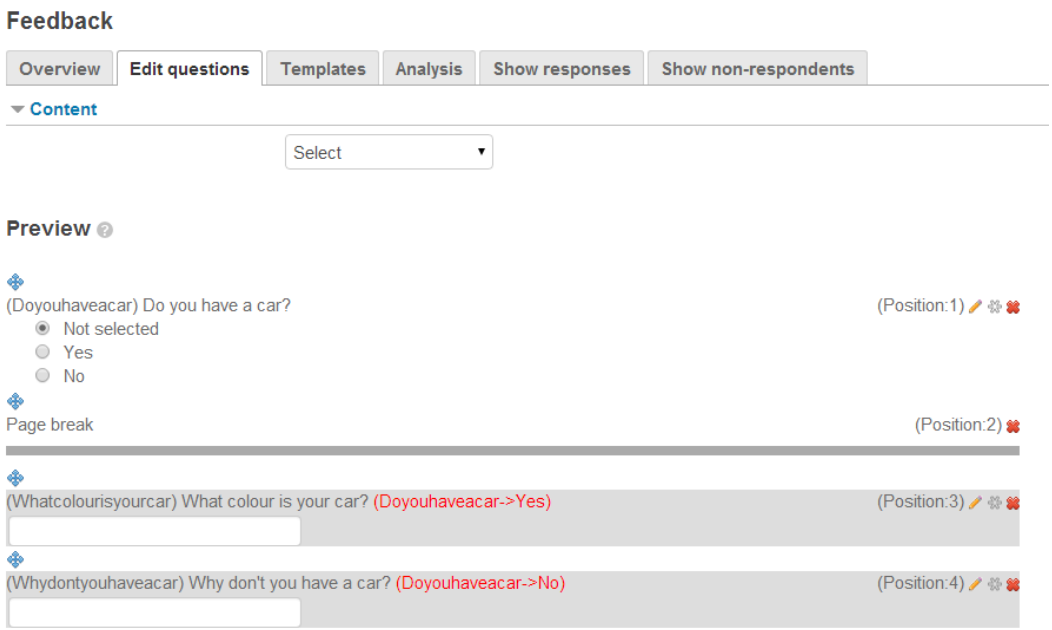


Dependence item: It is possible to show an item depending on the value of another item. Here is an example.

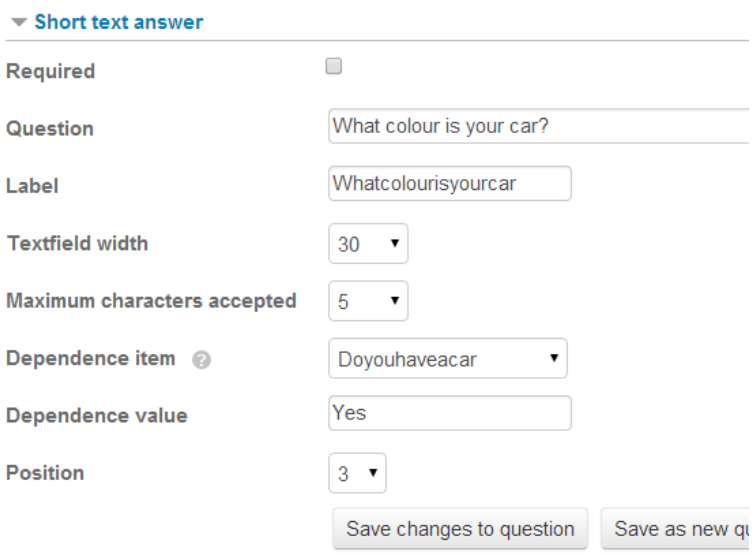
First, create an item on which another item will depend on.
Next, add a pagebreak.

Then add the items dependant on the value of the item created before. Choose the item from the list labelled "Dependence item" and write the required value in the textbox labelled "Dependence value".
The item structure should look like this.

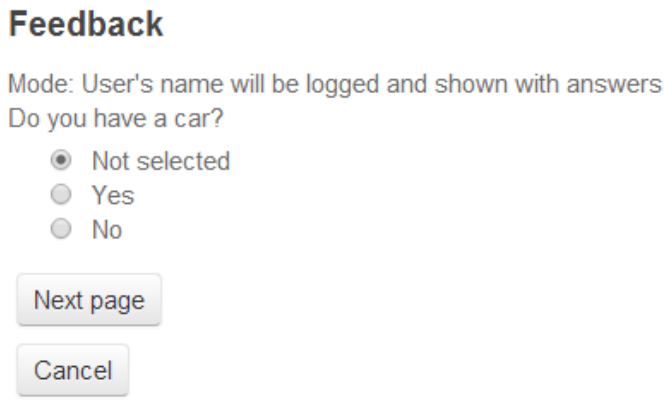
Item Q: Do you have a car? A: yes/no
Pagebreak
Item Q: What colour is your car?
(this item depends on item 1 with value = yes)
Item Q: Why don't you have a car?
(this item depends on item 1 with value = no)



Question setup:

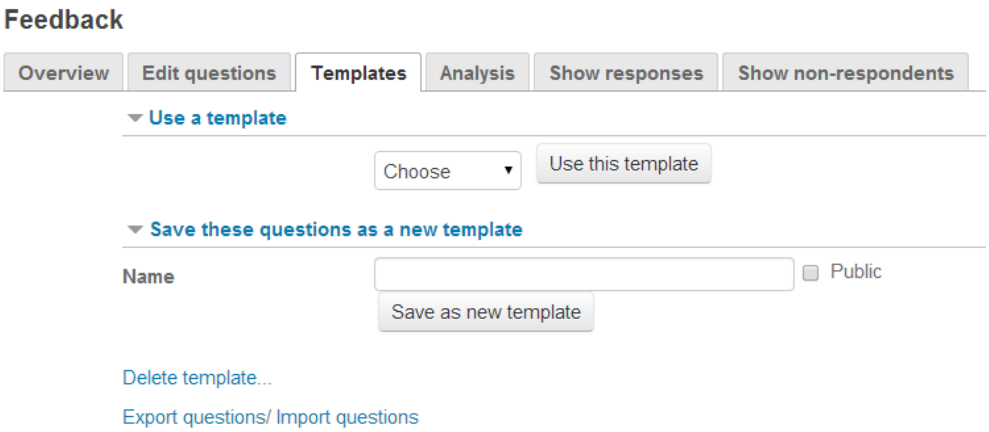


Answering questions with dependency

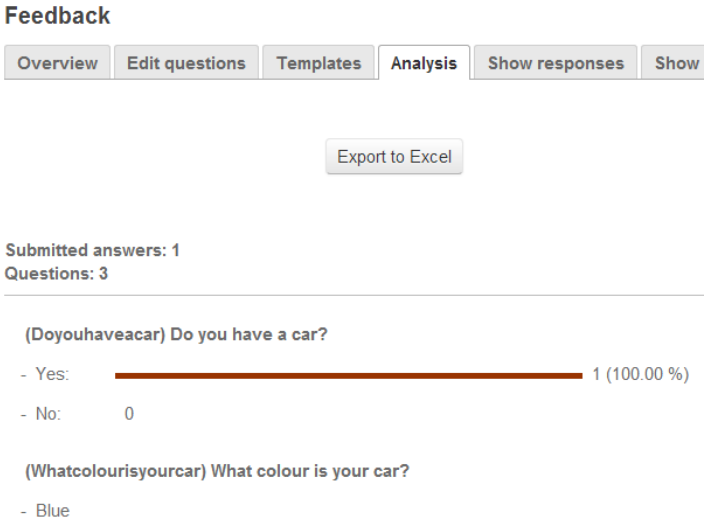


Templates

Save this feedback's questions as a template. Click public so any user can use these questions. Export/Import questions from another Feedback. Choose a template to use from the dropdown.

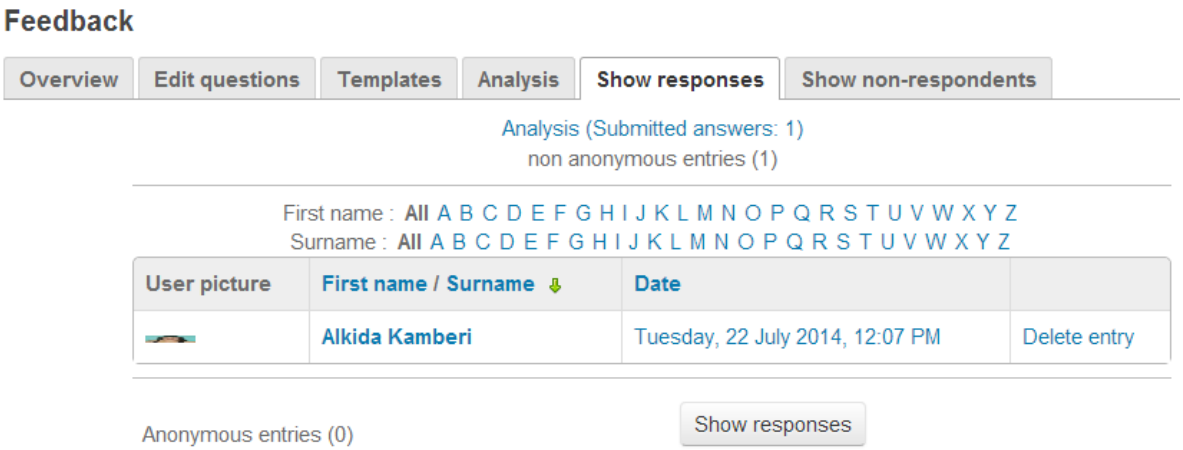


Analysis



See stats of replies

Show responses



Display respondents' profiles

Show non-respondents

List of people who have not replied
Select users with tick box and send a message.

Setting up the Question bank and adding a Quiz

There are three parts to setting up and using a quiz:

Adding questions to a Category in the Question Bank
Adding a Quiz activity to the course
Adding questions to the quiz activity from the Question bank

Adding a Question Category within a Course
Administration > Course administration > Question bank > Categories

(Add a new category - optional)

Adding questions to the Question Bank
Administration > Course administration > Question bank > Questions

Choose a category

Click "Create a new question"

Create a quiz

Turn editing on
Add activity or resource > Quiz

Expand al

General

Name* Moodle Knowledge Quiz

Description Show editing tools

Display description on course page

Timing

Open the quiz 2 October 2013 10 52 Enable

Close the quiz 2 October 2013 10 52 Enable

Time limit 0 minutes Enable

When time expires Attempts must be submitted before time expires, or they are not counted

Submission grace period 0 minutes Enable

Grade

Layout

Question order Shuffled randomly

New page Never, all questions on one page Repaginate now

+ Show more...

Question behaviour

Shuffle within questions Yes

How questions behave Deferred feedback with CBM

+ Show more...

Review options

During the attempt	Immediately after the attempt	Later, while the quiz is still open	After the quiz is closed
The attempt	The attempt	The attempt	The attempt
Whether correct	Whether correct	Whether correct	Whether correct
Marks	Marks	Marks	Marks
Specific feedback	Specific feedback	Specific feedback	Specific feedback
General feedback	General feedback	General feedback	General feedback
Right answer	Right answer	Right answer	Right answer
Overall feedback	Overall feedback	Overall feedback	Overall feedback

Display

Extra restrictions on attempts

Overall feedback

Grade boundary 100%

Feedback Show editing tools

Grade boundary

Feedback Show editing tools

Grade boundary

Feedback Show editing tools

Grade boundary

Feedback Show editing tools

Grade boundary

Feedback Show editing tools

Grade boundary 0%

Add 3 more feedback fields

Common module settings

Restrict access

Activity completion

Save and return to course Save and display Cancel

Grade boundary 0%

Add 3 more feedback fields

Enter a **name**

Timing: Choose open and close dates

Layout:

Question order: As shown on edit screen or Shuffled randomly

New page: Never, or every *x* questions.

Question behaviour: (moodle docs page)

Shuffle within questions: multiple choice type questions have their choices shuffled

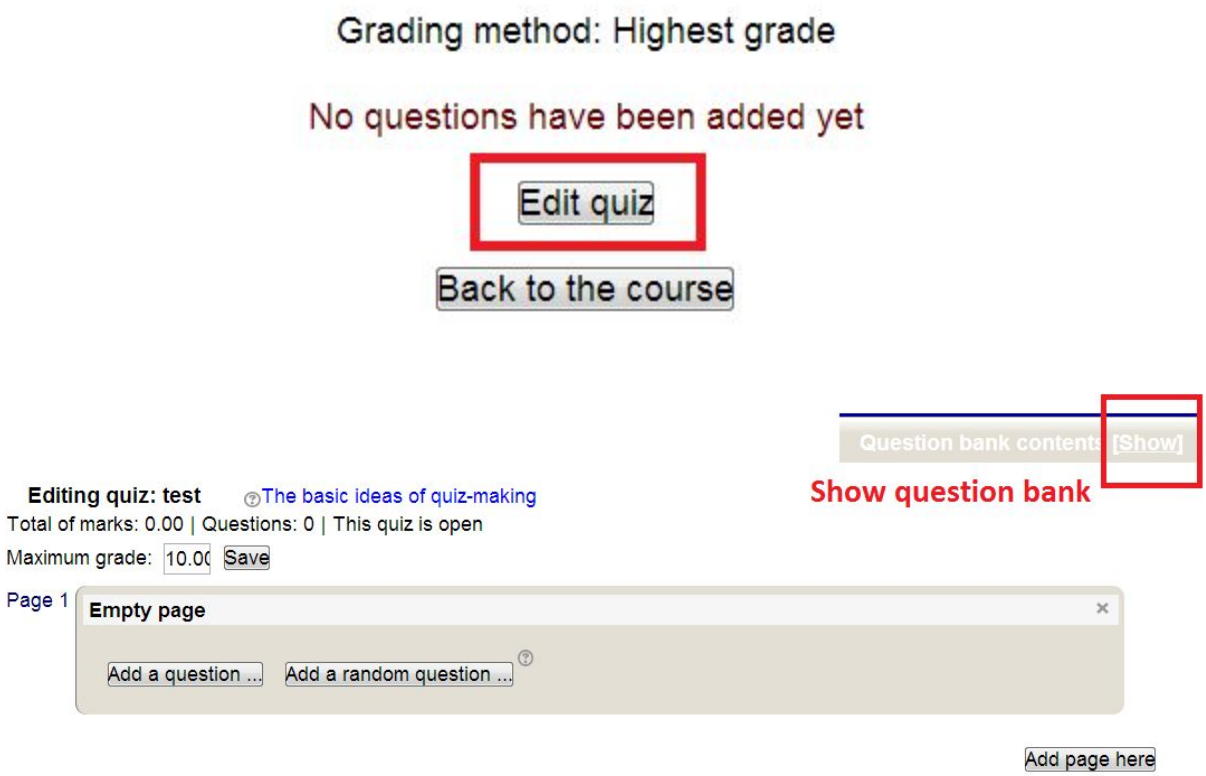
How questions behave: Adaptive (multiple tries with hints), Deferred feedback or Immediate feedback (you can choose certainty based marking here)

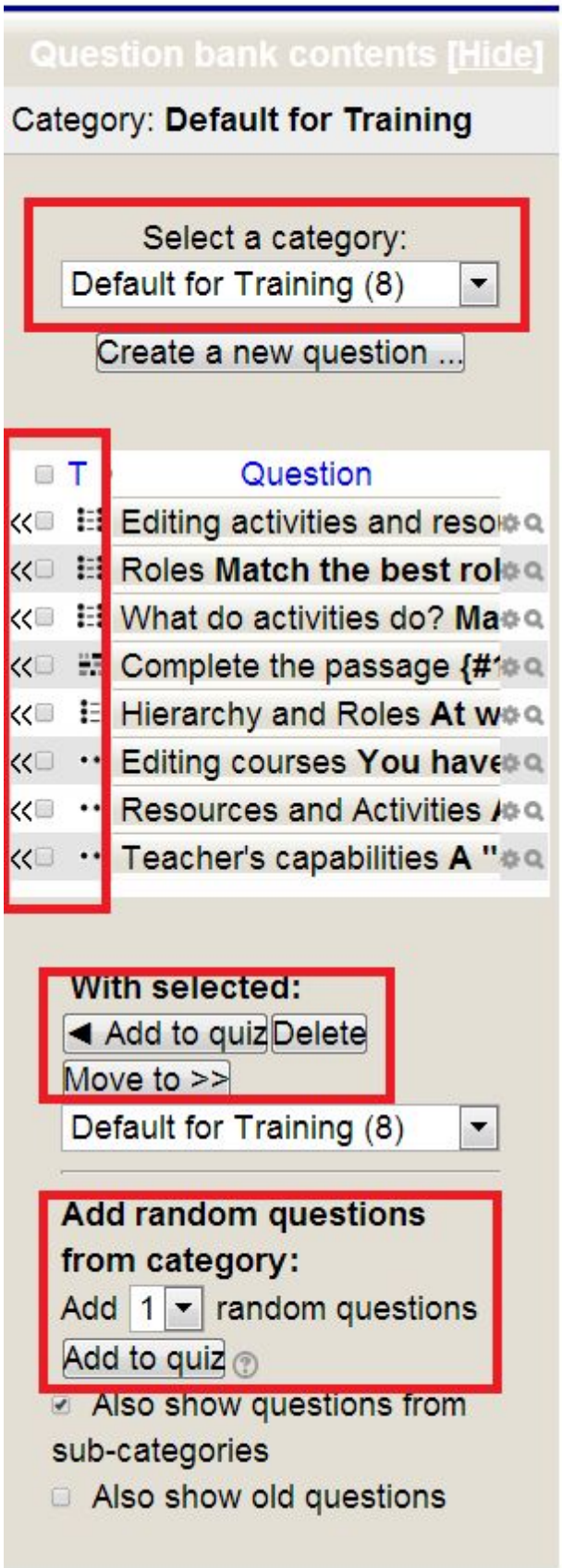
Review options: When to give feedback during the quiz

Overall feedback: Feedback for grade boundaries

Save and display the quiz

Add questions to a quiz





Choose Category

Choose questions to use

Add to quiz, delete or move category

Add *n* random questions

Quiz Scoring

When a student attempts a Quiz activity in Moodle, the student's responses are scored automatically by Moodle.

The formula to work out the points for each question is

Question grade * Maximum grade / Total of grades

- Question grade is 1 by default.
- Maximum Grade is 100 by default.
- Total of grades is the sum of Question grades

The Grade for each question. (This is set to 1.00 by default.)

The Total of grades for all questions in the activity. (This is equal to the number of questions by default.)

The Maximum grade specified for the activity as a whole. (This is set to 100.00 by default.)

The Maximum grade is the maximum a student can get if she or he scored perfectly on all questions in the Quiz.

Note: Moodle will automatically weight the questions to make sure that the total grade fits within the Maximum grade parameter.

Moodle assigns a value of (Question grade * Maximum grade / Total of grades) for each question. Therefore, if you use the default settings and if a Quiz activity had N questions, Moodle will ensure that each question is worth 100/N points.

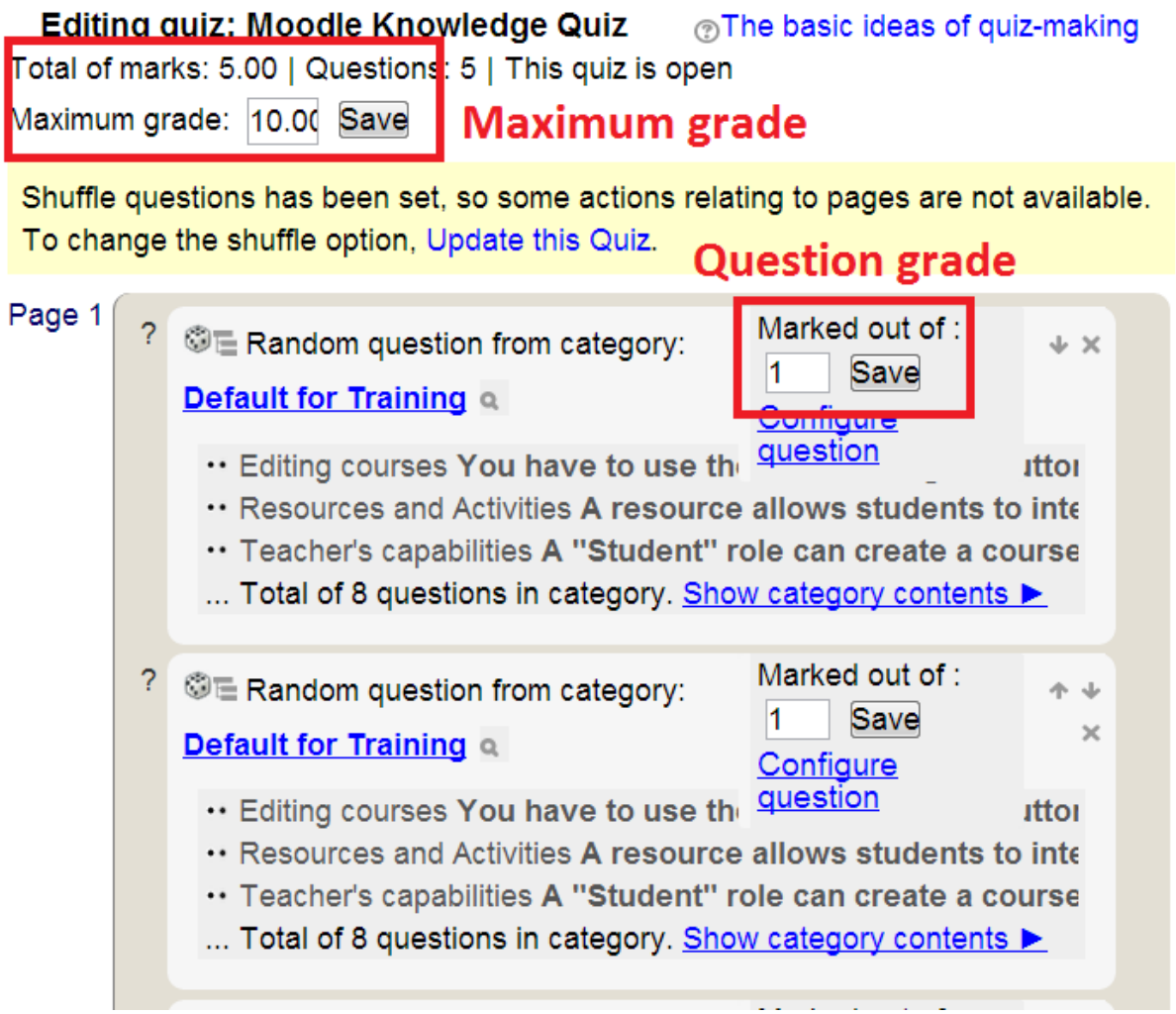
For example, suppose there are two questions in your Moodle Quiz with a Question grade of 1 each:

Each question is worth 100/2 = 50 points, so if a student answers both questions correctly she or he will get a full total of 100 points.

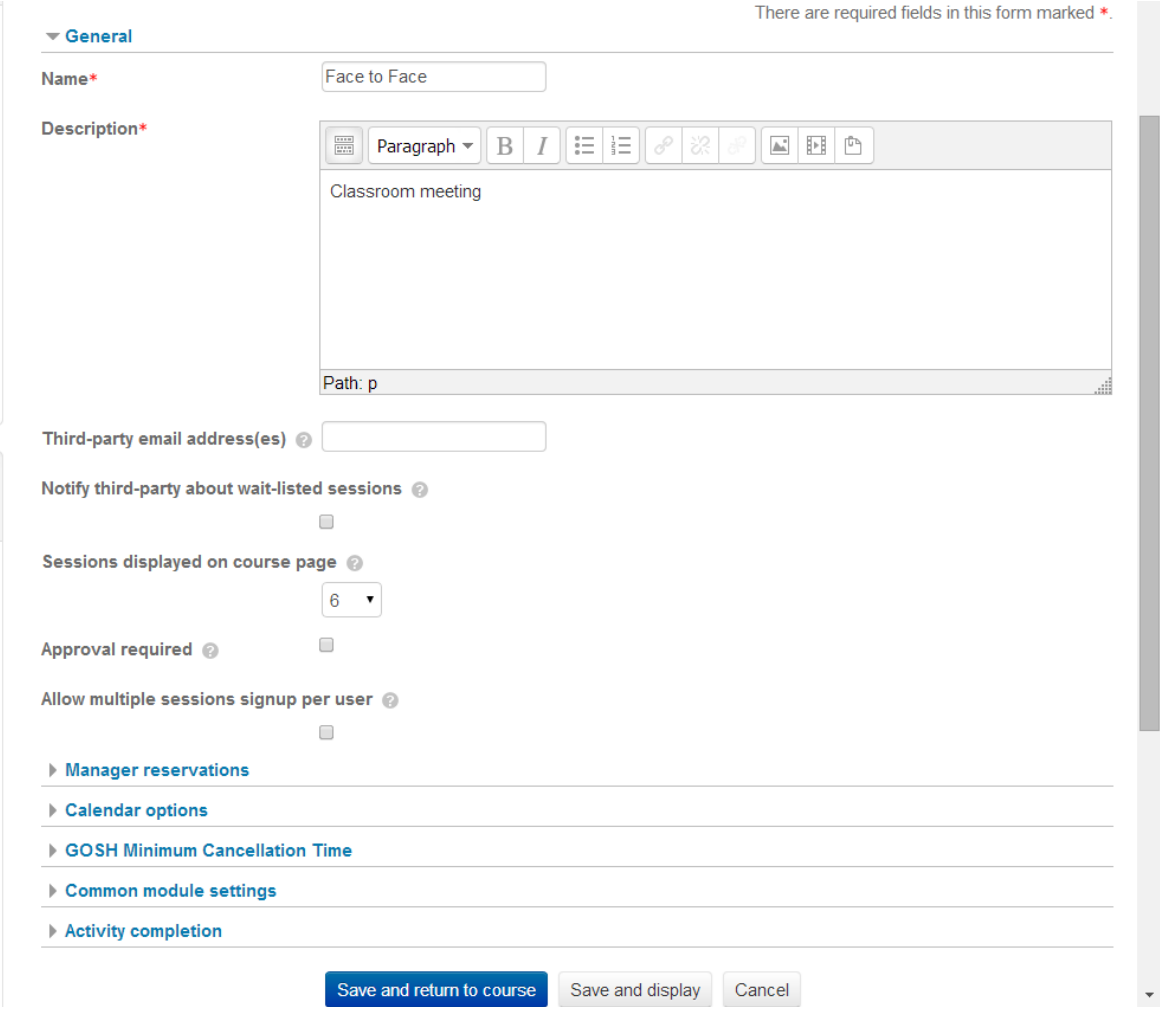
If the scoring changed for Question 1 so that its Question grade is 2:

Question 1 will be worth (2*100 / 3) = 66.67 points and Question 2 will be worth (1*100 / 3) = 33.33 points, i.e. Question 1 is worth twice as much as Question 2.

If a student got question 1 correct and question 2 wrong they would get 66.6 points.


Editing quiz: Moodle Knowledge Quiz
The basic ideas of quiz-making
Total of marks: 5.00 | Questions: 5 | This quiz is open
Maximum grade: 10.00 Save
Maximum grade
Shuffle questions has been set, so some actions relating to pages are not available.
To change the shuffle option, Update this Quiz.
Question grade
Page 1
Random question from category:
Default for Training
Marked out of :
1 Save
Configure question
Editing courses You have to use th
Resources and Activities A resource allows students to inte
Teacher's capabilities A "Student" role can create a course
... Total of 8 questions in category. Show category contents ▶
Random question from category:
Default for Training
Marked out of :
1 Save
Configure question
Editing courses You have to use th
Resources and Activities A resource allows students to inte
Teacher's capabilities A "Student" role can create a course
... Total of 8 questions in category. Show category contents ▶

Face to Face



General

Name of session
Description - more details
Third-party email address(es) Third-party email address(es) is an optional field used to specify the email address of a third-party (such as an external instructor) who will then receive confirmation messages whenever a user signs-up for a session. When entering multiple email addresses, separate each address with a comma. For example: bob@example.com,joe@example.com

Notify third-party about wait-listed sessions When Notify third-party about wait-listed sessions is selected the third-party(s) will be notified when a learner signs up for a wait-listed session. When

Notify third-party about wait-listed sessions is not enabled third-party(s) will only be notified when a user signs up (or cancels) for a scheduled session.

Sessions displayed on course page This is the number of sessions for each face-to-face activity that will be shown on the main course page.

Approval required When "Approval required" is checked, a learner will need approval from their manager to be permitted to attend a face-to-face session.

Allow multiple sessions signup per user Use this option if you want users be able to sign up to multiple sessions . When this option is toggled, users can sign up for multiple sessions in the activity.

Manager reservations

Allow manager reservations Managers are able to make reservations or bookings on behalf of their team members

Maximum reservations The maximum number of reservations / bookings that a manager can make for their team

Automatically cancel reservations If not confirmed within x days (below)

Reservation cancellation days The number of days in advance of the session that reservations will be automatically cancelled, if not confirmed

Reservation deadline The number of days before the session starts after which no more reservations are allowed (must be greater than the cancellation days)

Calendar options

Calendar display settings When Site is selected the face-to-face activity sessions will be displayed on the site calendar as a Global Event. All site users will be able to view these sessions.

When Course is selected all of the face-to-face activity sessions will be displayed on the course calendar and as Course Event on the site level calendar and visible to all users enrolled in the course.

When None is selected, face-to-face activity sessions will only be displayed as User Events on a confirmed attendee's calendar, provided the Show on user's calendar option has been selected.

Show entry on user's calendar When active this setting adds a User Event entry to the calendar of an attendee of a face-to-face session. When turned off this prevents a duplicate event appearing in a session attendee's calendar, where you have calendar display settings set to Course or Site.

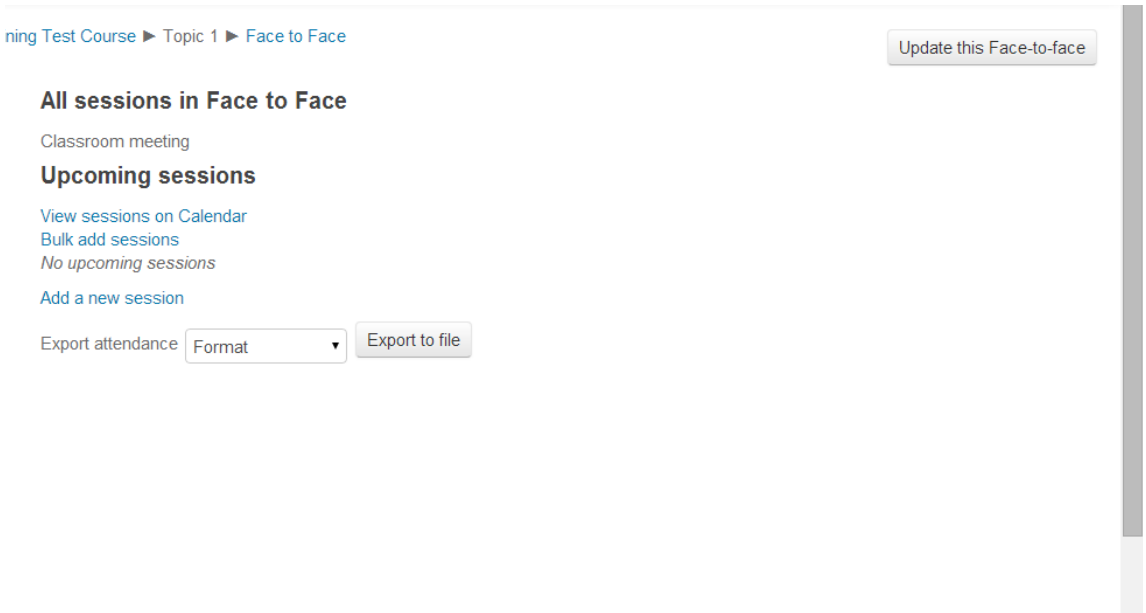
Short name Short name is the description of the session that appears on the training calendar when Show on the calendar is enabled.

GOSH Minimum Cancellation Time

Minimum cancellation time
Unit

Face to Face activity screen

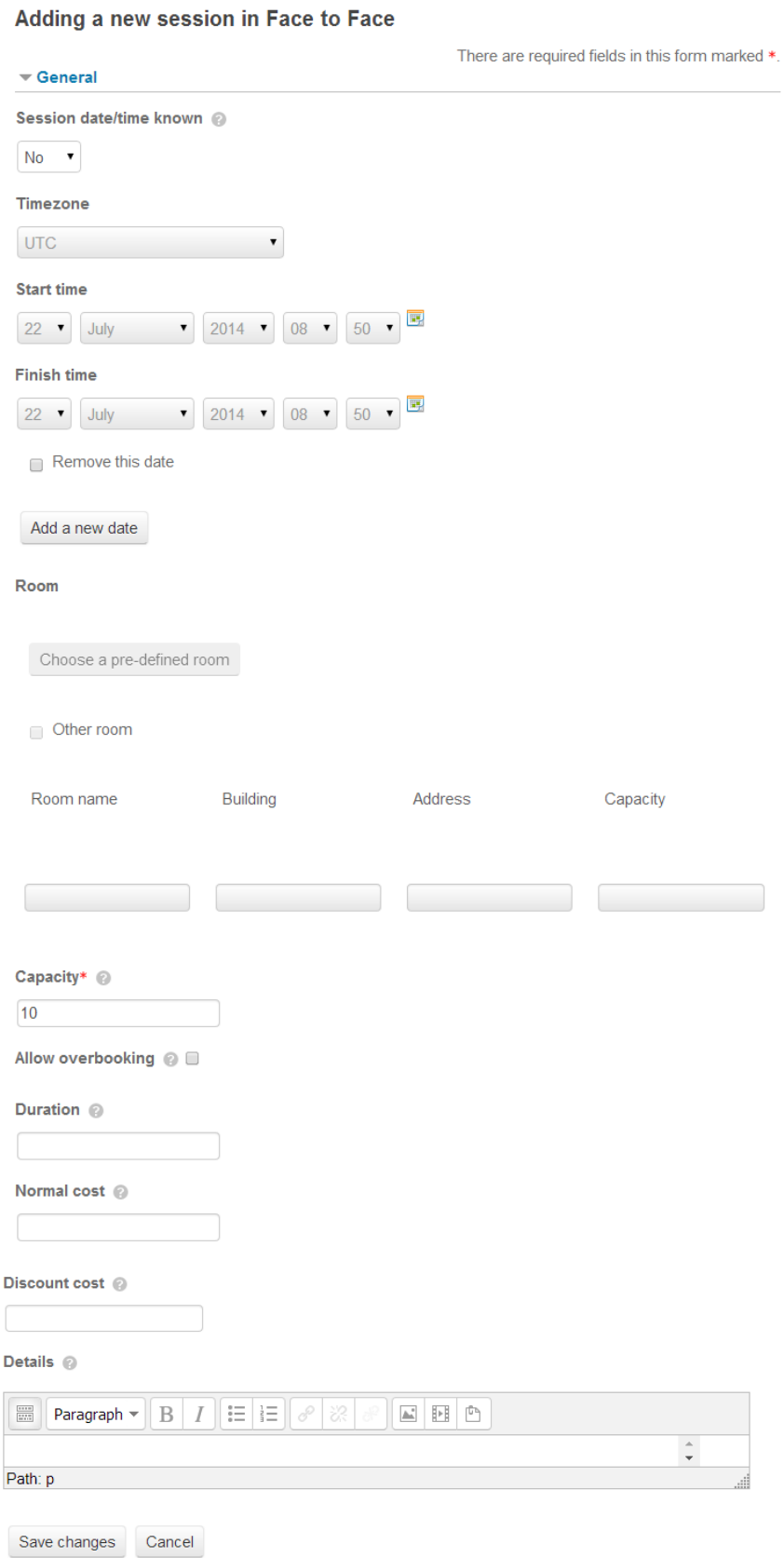
Appears after setting up the activity



Add a New Session

Create a meeting instance (multiple sessions can be created in one F2F activity)

General



Session date/time known If a session's date/time is known

If "Yes" is entered for this setting, the session date and time will be displayed on the course page (if the session is upcoming and available), the "View all sessions page", the session sign-up page, as well as all email notifications related to the session.

When a staff member signs up for a session with a known date and time:

The staff member and the staff member's manager will be sent a confirmation email (i.e., the one formatted per the "Confirmation message" section of the face-to-face instance's settings).
The staff member will be sent a reminder email message (i.e., the one formatted per the "Reminder message" section of the face-to-face instance's settings). The reminder will be sent a number of days before the session, according to the "Days before message is sent" setting also found in the "Reminder message" section of the face-to-face instance's settings.

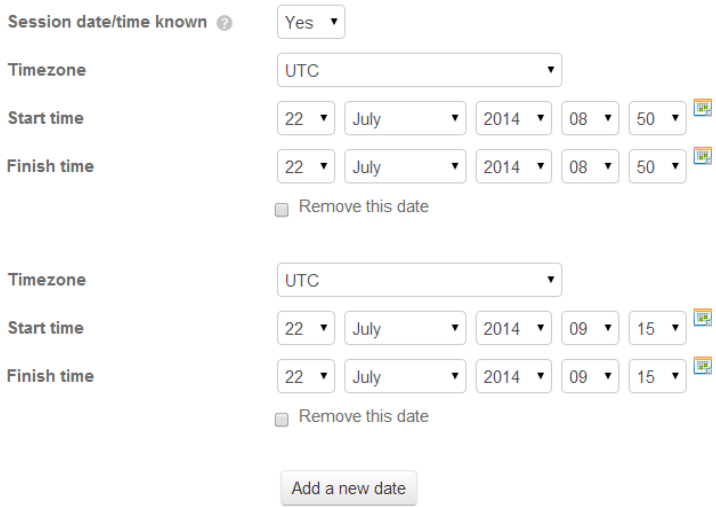
If a session's date/time is not known (or wait-listed)

If "No" is entered for this setting, the text "wait-listed" will be displayed on the course page, the "View all sessions page", the session sign-up page, as well as all email notifications related to the session.

When a staff member signs up for a wait-listed session:

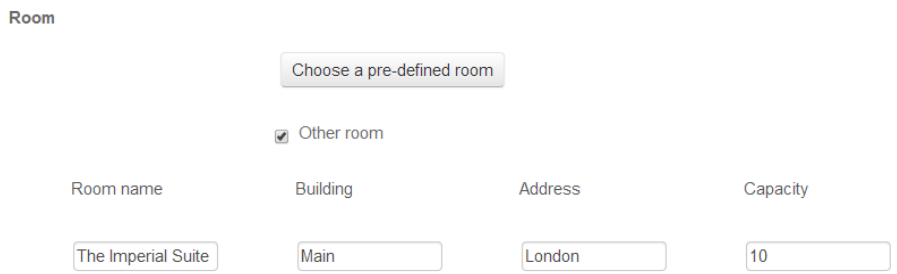
The staff member will be sent a confirmation email (i.e. the one formatted per the "Wait-listed message" section of the face-to-face instance's settings).
The staff member will not be sent a reminder email message.
The staff member's manager will not be sent confirmation and cancellation email messages.

If set to Yes, enter meeting time details. Add a new date if there are multiple dates.



Room

Choose a **predefined room** (select from rooms created by admin)
Tick **Other room** box to enter room details manually.



Capacity Of session, not room. Capacity is the number of seats available in a session.

When a face-to-face session reaches capacity the session details do not appear on the course page. The details will appear greyed out on the 'View all sessions' page and the learner cannot enrol on the session.

Allow overbooking When "Allow overbooking" is checked, learners will be able to sign up for a face-to-face session even if it is already full. See Managing Enrollments>In case of Overbooking below.

When a learner signs up for a session that is already full, they will receive an email advising that they have been waitlisted for the session and will be notified when a booking becomes available.

Duration is the total length of the training in hours. For example:

"2 hours" is enters as 2 or 2:00
"1 hour and 30 minutes" is entered as 1:30
"45 minutes" is entered as 0:45
"20 minutes" is entered as 0:20.
If the training occurs over two or more time periods, the duration is the combined total.

Normal cost is the amount charged to staff members who do not have a membership id.

Discount cost is the amount charged to staff members who have a membership id.

Details are tracked per session basis. If text is populated in the details field, the details text will be displayed on the user signup page. By default, the details text also appears in the confirmation, reminder, waitlist and cancellation email messages.

Result of adding a session

Upcoming sessions

View sessions on Calendar
Bulk add sessions
Last reservations are 2 days before the session starts. Unallocated reservations will be deleted 1 days before the session starts.

Date	Time and Time Zone	Room	Capacity	Status	Options
22 August 2014 22 August 2014	8:50 AM - 8:50 AM UTC 9:15 AM - 9:15 AM UTC	The Imperial Suite Main London	0 / 10	Booking open	Attendees Sign-up

Exported attendance in Excel format (no signups):

A	B	C	D	E	F	G	H	I	J	K	L	M	
Start date	Finish date	Room	Start time	Finish time	Duration	Status	First name	Surname	ID number	Institution	Departmer	Email addr	Mar
22/08/2014 08:50	22/08/2014 08:50	The Imperi	8:50 AM U	8:50 AM U	0	Booking open	-	-	-	-	-	-	-
22/08/2014 09:15	22/08/2014 09:15	The Imperi	9:15 AM U	9:15 AM U	0	Booking open	-	-	-	-	-	-	-

Managing Enrollments

Sign Up

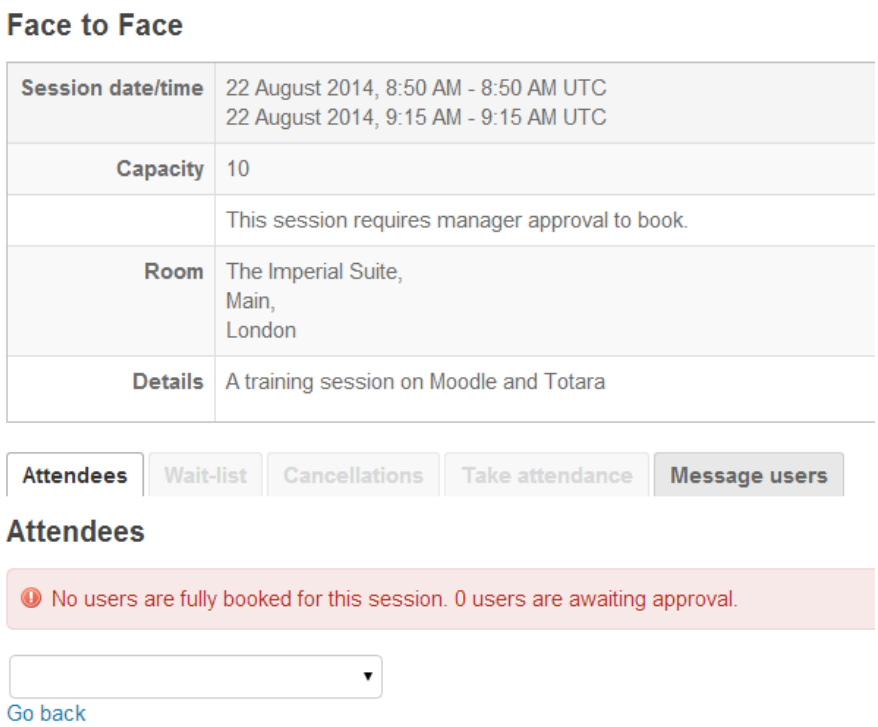
Click signup in the options box.

days before the session starts.

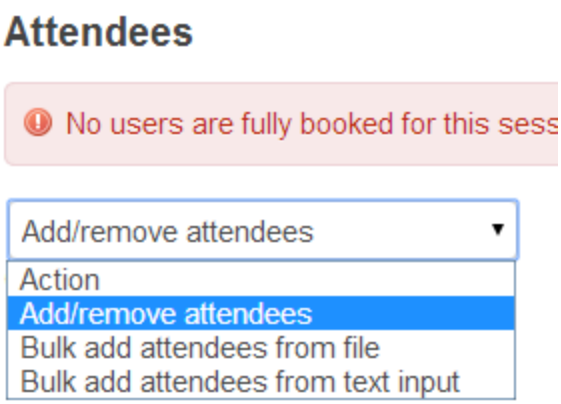
	Status	Options
	Booking open	Attendees Sign-up
I)	Booking full	Attendees Sign-up

Attendees

Attendees | Wait-list | Cancellations | Take attendance | Approval required | Message users

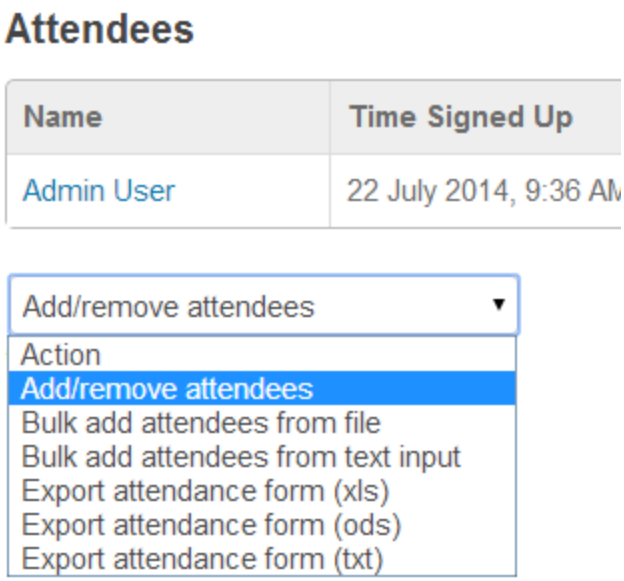


Use the dropdown to add attendees manually or via CSV



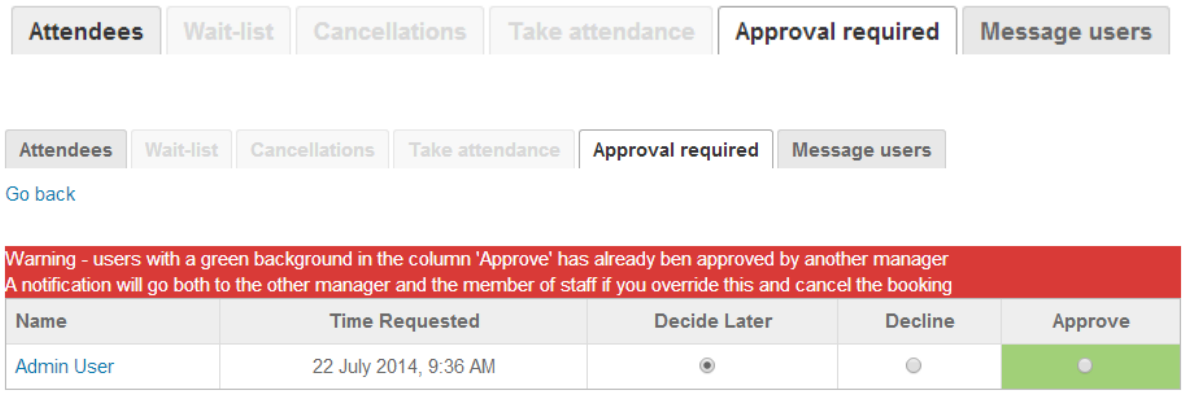
Add/Remove attendees: use Totara user filter
Bulk add attendees from file / text input: Use CSV format of users to bulk upload via file or copy/paste

When users are enrolled, extra options are available: Export attendance



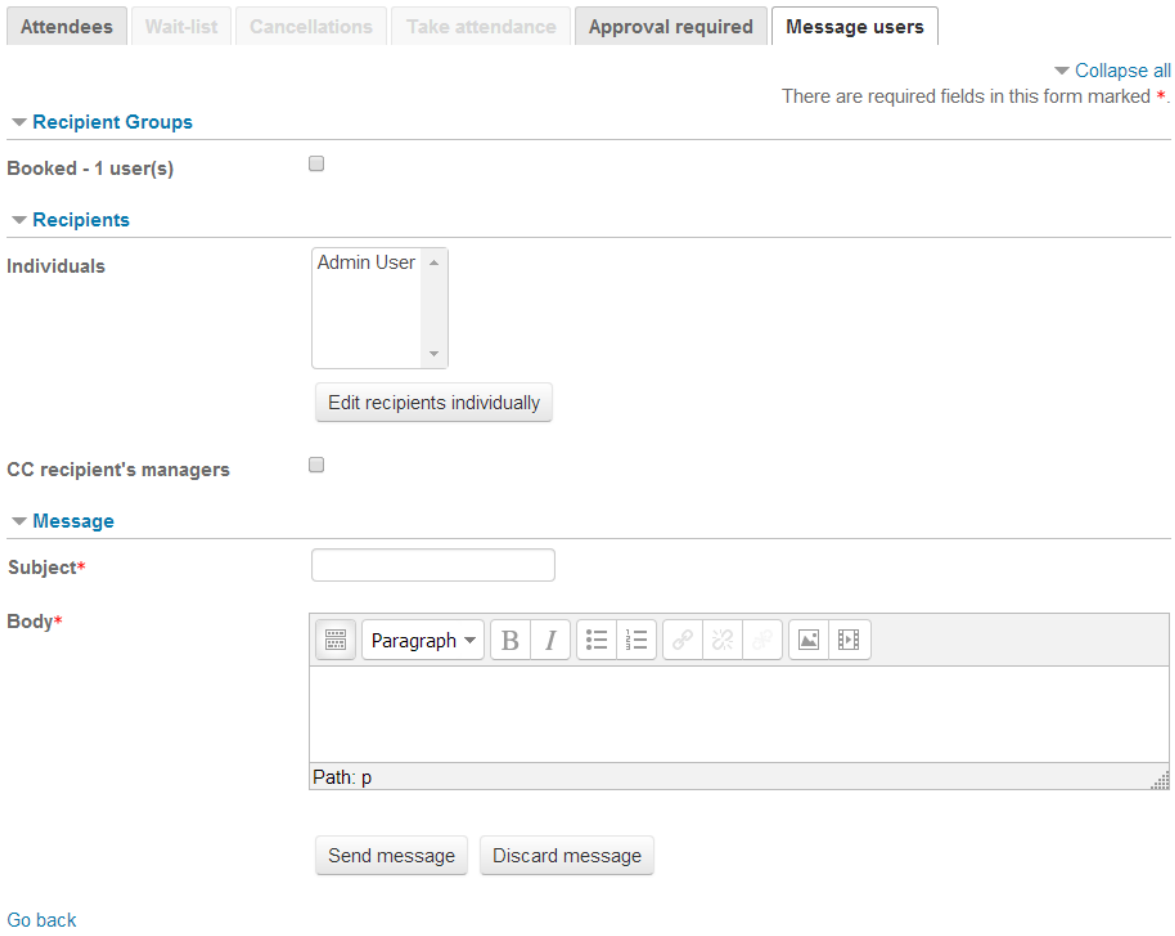
Approval Required

Manually approve or decline attendance



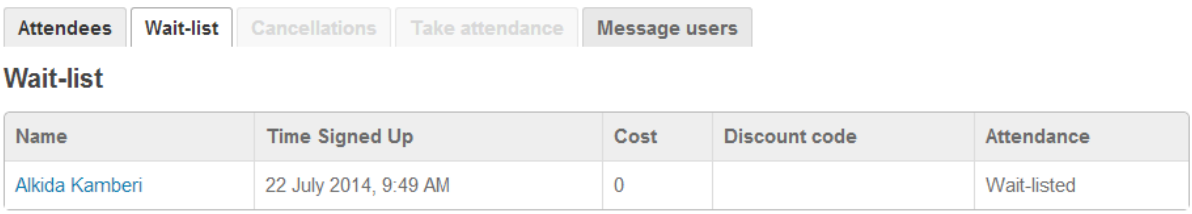
Message Users

Recipient Groups: Tick a box next to the groups you want to message
Recipients: Choose individuals
Message Enter message details

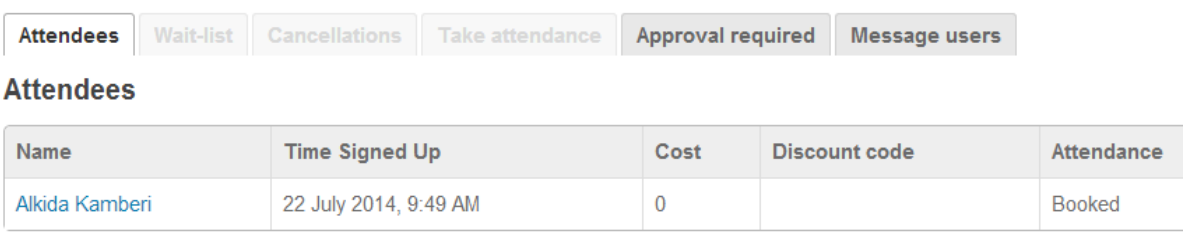


Wait-listed session

Displays if no date/time set. Displays list of wait listed users.



When time/date entered into session, Approval and Booking become active. User is automatically enrolled once time entered.



In case of overbooking

Attendees | Wait-list | Cancellations | Take attendance | Approval required | Message users

Add/edit attendees success - Successfully added/edited 1 attendees. (View results)

This session is overbooked (2 / 1)

Attendees

Name	Time Signed Up	Cost	Discount code	Attendance
Alkida Kamberi	22 July 2014, 9:49 AM	0		Booked
Margaret Johnson	22 July 2014, 9:55 AM	0		

Users who are overbooked are wait listed

Attendees | Wait-list | Cancellations | Take attendance | Approval required | Message users

Wait-list

Name	Time Signed Up	Cost	Discount code	Attendance
Margaret Johnson	22 July 2014, 9:55 AM	0		Wait-listed

Capacity* 1

Allow overbooking ☑

If allow overbooking is enabled, then overbooked users (greater than capacity) will be put on wait list. You can then approve decline manually in Approval required.

Session date/time	22 August 2014, 9:55 AM - 9:55 AM UTC
Capacity	1 (allow overbooking)
	This session requires manager approval to book.
	This session is currently full. By clicking the "Sign-up" button, you will be placed on the sessions's wait-list.

Attendees | Wait-list | Cancellations | Take attendance | **Approval required** | **Message users**

Attendees

Name	Time Signed Up	Cost	Discount code	Attendance
Margaret Johnson	22 July 2014, 9:55 AM	0		Booked

Displays list of signups. Decide attendance using Decline or approve.

Attendees | Wait-list | Cancellations | Take attendance | **Approval required** | **Message users**

Go back

Warning - users with a green background in the column 'Approve' has already ben approved by another manager
A notification will go both to the other manager and the member of staff if you override this and cancel the booking

Name	Time Requested	Decide Later	Decline	Approve
Alkida Kamberi	22 July 2014, 10:03 AM	◉	○	○
Margaret Johnson	22 July 2014, 10:00 AM	◉	○	○

If both Approved, first in list gets enrolled.

Cancel booking

Date	Time and Time Zone	Room	Capacity	Status	Options
22 August 2014 22 August 2014	8:50 AM - 8:50 AM UTC 9:15 AM - 9:15 AM UTC	The Imperial Suite Main London	1 / 10	Booked	Attendees More info Cancel booking

Click Cancel and give a reason.

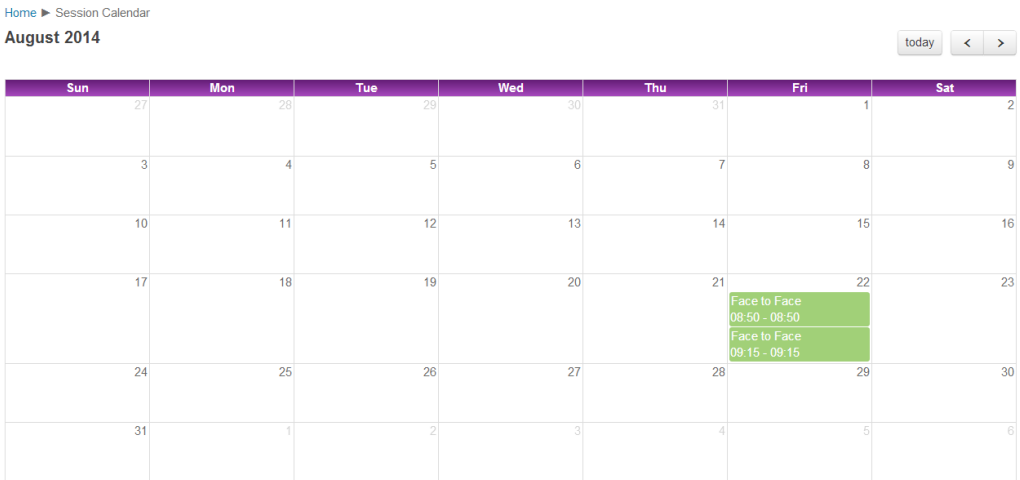
Bulk upload Face to face sessions

Example CSV:

sessiondate	sessionstarttime	sessionstarttime	capacity	roomname	roombuilding	roomaddress	roomcapacity	allooverbooking
16/07/2014	10:00	11:00	10	Room 1	Main Building	London House	15	1
20/07/2014	12:00	13:00	20	Room 4	Main Building	London House	20	0
26/07/2014	09:00	09:30	30	Room 6	Second Building	LOndon House	40	1

View Session Calendar

Example of populated session calendar



General Default Settings

Defaults can be set here
http://gosh.wawstaging.com/admin/settings.php?section=modsettingfacetoface

Messages

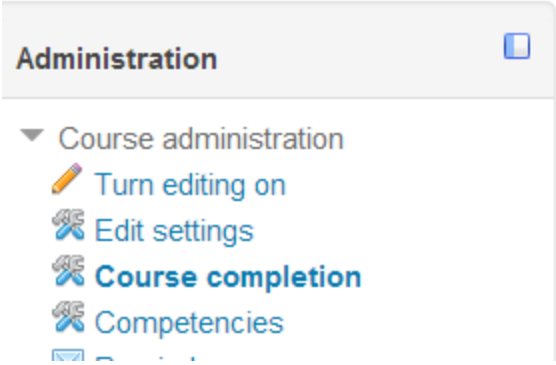
Email messages can be configured here
http://gosh.wawstaging.com/mod/facetoface/notification/template/

Room Setup

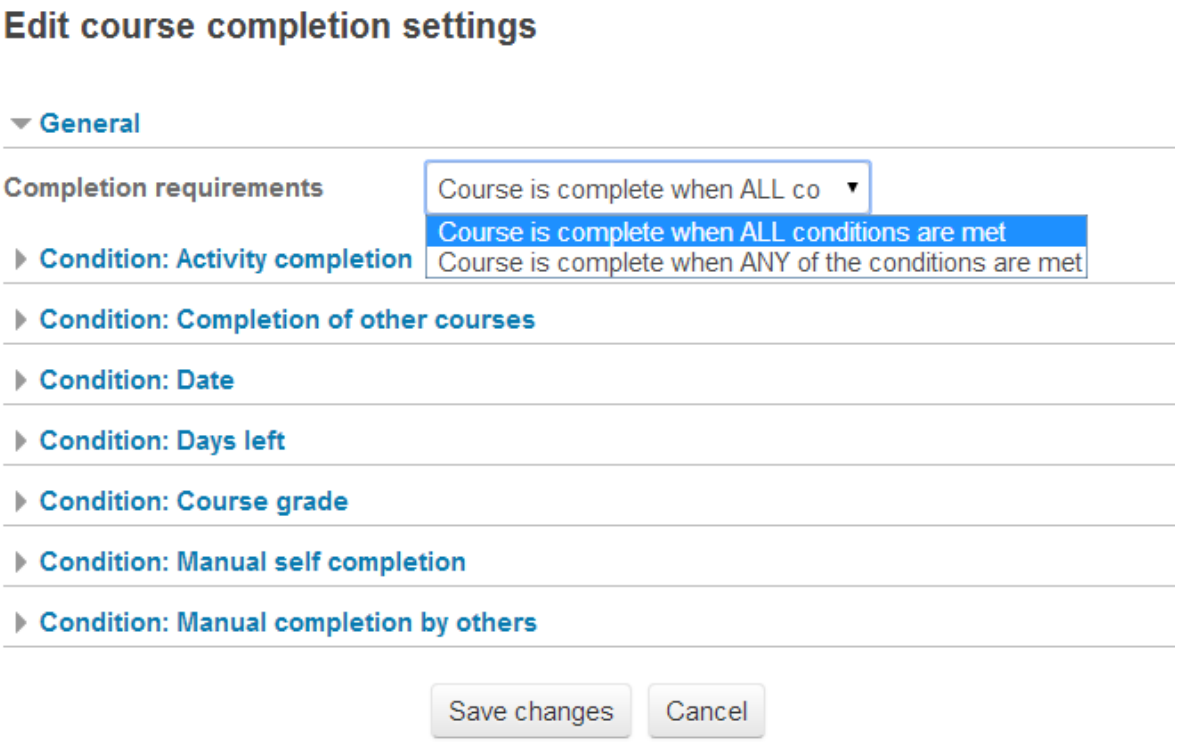
You can create rooms here
http://gosh.wawstaging.com/mod/facetoface/room/manage.php

Course Completion

A method to define the criteria for when a course is complete. This involves setting various options like Activity completion, dates, completion of other courses etc.



Course Completion Screen



Activity Completion

Define what course activities (e.g. assignment, SCORM package etc) must have been completed for the course to be considered complete. This list displays all of the activities in the course. Tick the activities that must be completed.

Work through the other settings and enter criteria as necessary.

Activity Completion and Restrict Access

These two features can work together to allow a course designer to create a set of activities that have to be completed in a certain order with certain results.

For example, a learner has to complete 5 activities before getting a Certificate. You course might look like this:

1 Read a PDF
2 Complete a Quiz with at least 80% score
3 Watch a Video
4 Post to a Forum
5 Final Quiz with at least 80% score

Finish: Get a Certificate of Completion

Using Activity Completion and Restrict Access you would set up the conditions in reverse order:

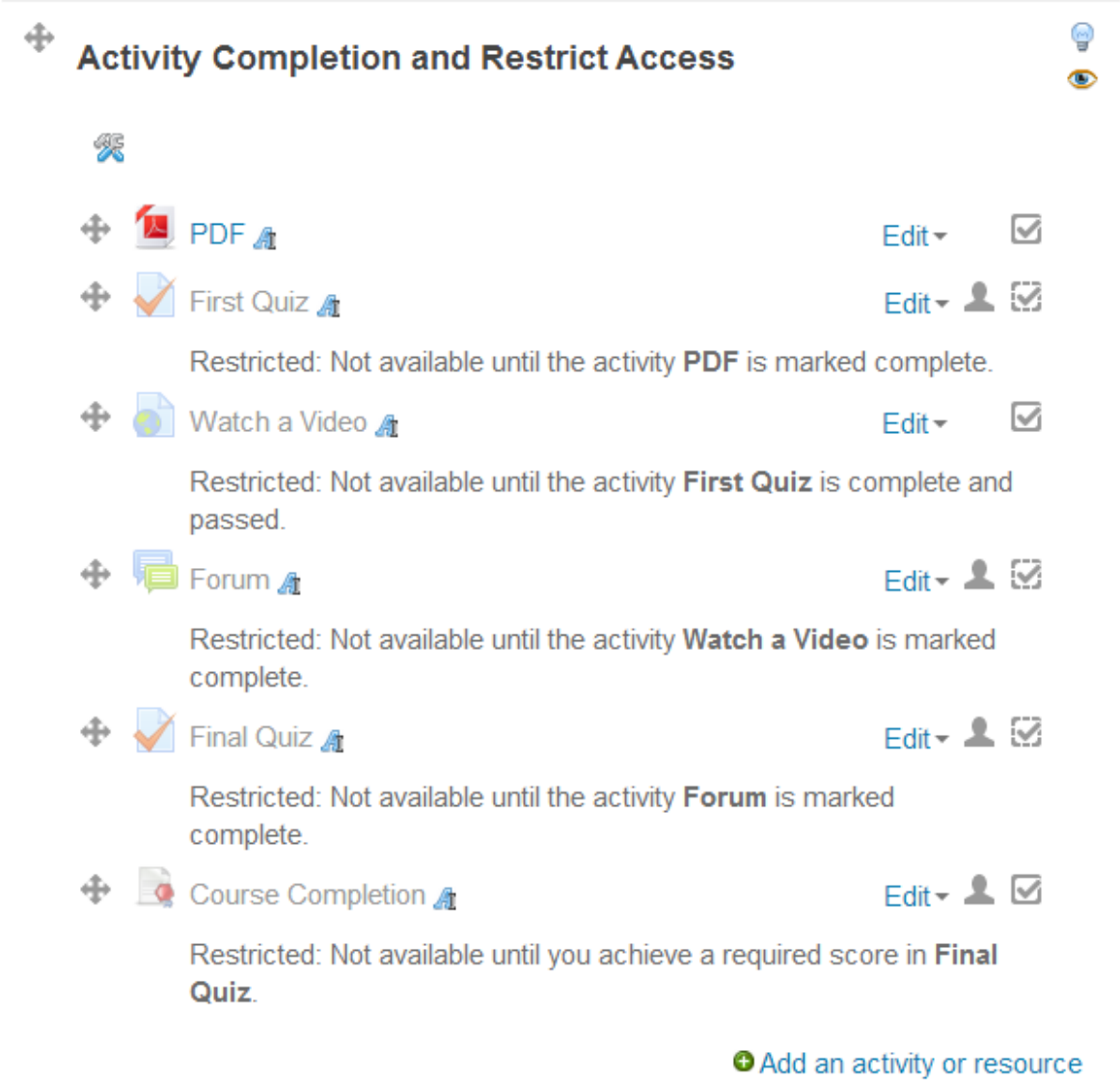
1 Certificate completion depends upon completing the final quiz with at least 80%.
2 Access to the Final Quiz depends upon posting something to the Forum
3 Access to the forum depends upon watching the video
4 Access to the video depends upon completing the first quiz with a score of more than 80%
5 Access to the quiz depends upon having accessed the PDF

The PDF is the first item available on the course.

To set up each part, you'll need to set both the restrict access and completion criteria for each activity.

The restrict access needs to be set to show what other activities need to be completed before allowing access.

The Activity completion needs to set the criteria for this activity to be shown as complete. Once marked complete, then restrict access can use the criteria for allowing access.



Activity Completion

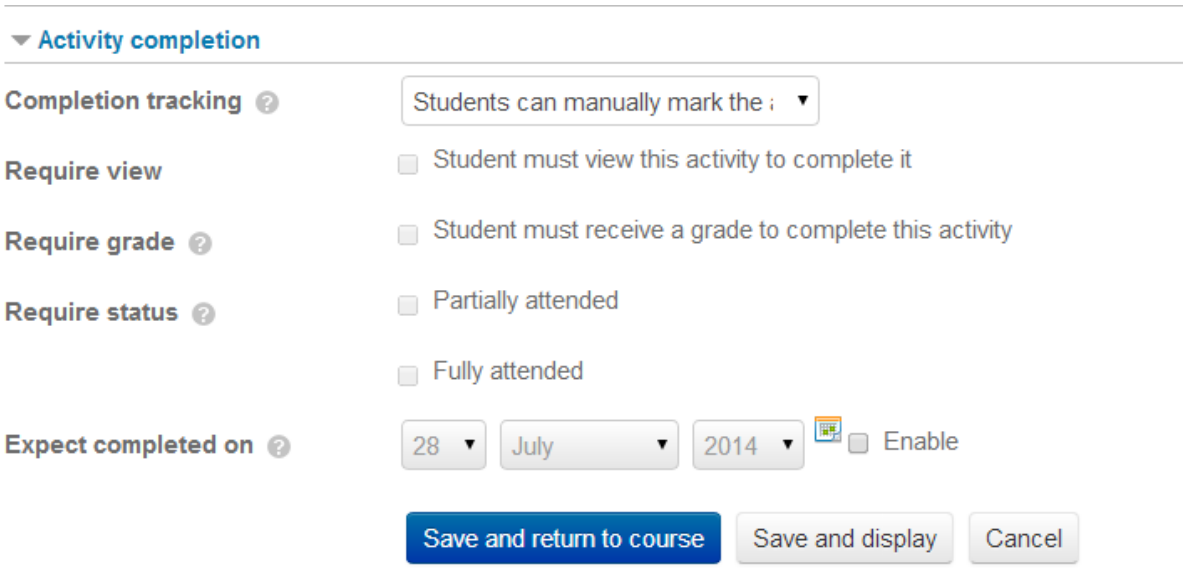
This is a setting located at the bottom of every activity in the course.

You need to define the criteria for each activity's completion. Each activity have different criteria based on their type.

For example, a PDF only has the option to show as complete when viewed. A SCORM package has the options to show as complete once a particular grade is obtained.

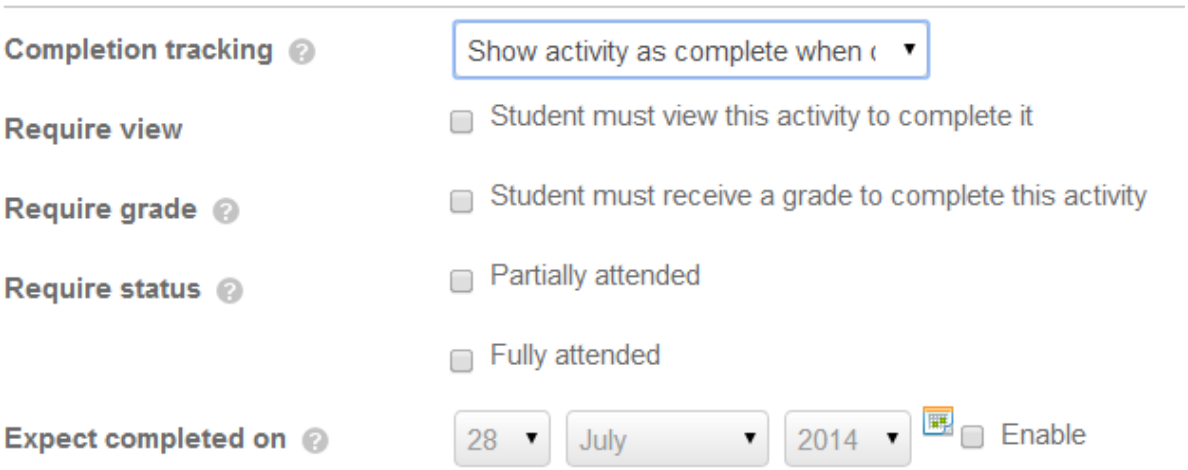
Enter the activity's settings

Scroll down and open Activity Completion (this is for the face to face activity)



Completion Tracking: Choose from the dropdown. Do not indicate completion, Students can manually mark complete or Show activity as complete when conditions are met (this enables the criteria).

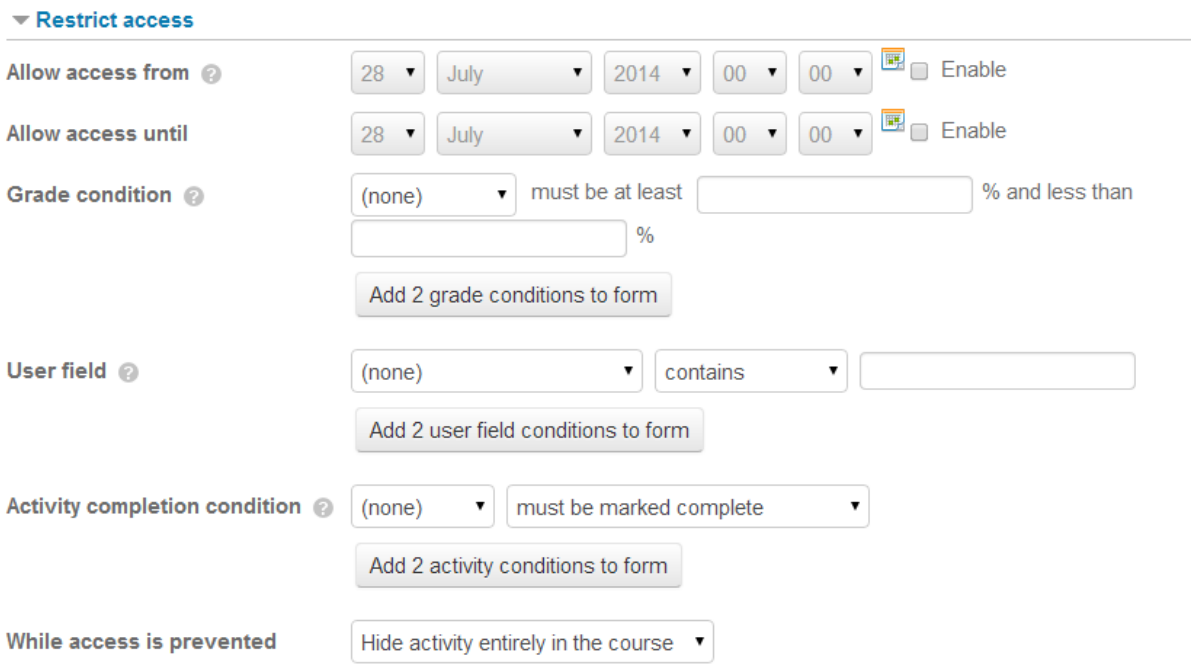
Choose the completion criteria:



Click save.

Restrict Access

This can be found in the activity's settings page. Scroll down and open Restrict access.



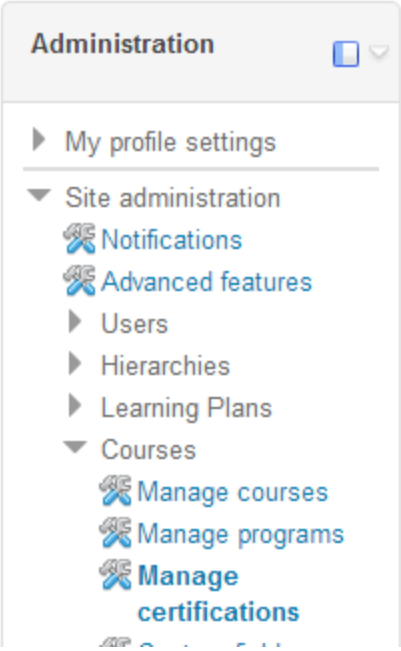
Allow access from and until: Open the activity
Grade condition: This setting determines any grade conditions which must be met in order to access the activity. Multiple grade conditions may be set if desired. If so, the activity will only allow access when ALL grade conditions are met.
User field: You can restrict access based on any field from the users profile.
Activity completion condition: This setting determines any activity completion conditions which must be met in order to access the activity. Note that completion tracking must first be set before an activity completion condition can be set. Multiple activity completion conditions may be set if desired. If so, access to the activity will only be permitted when ALL activity completion conditions are met.
While access is prevented: How to display the activity, hide or grey out with explanation.

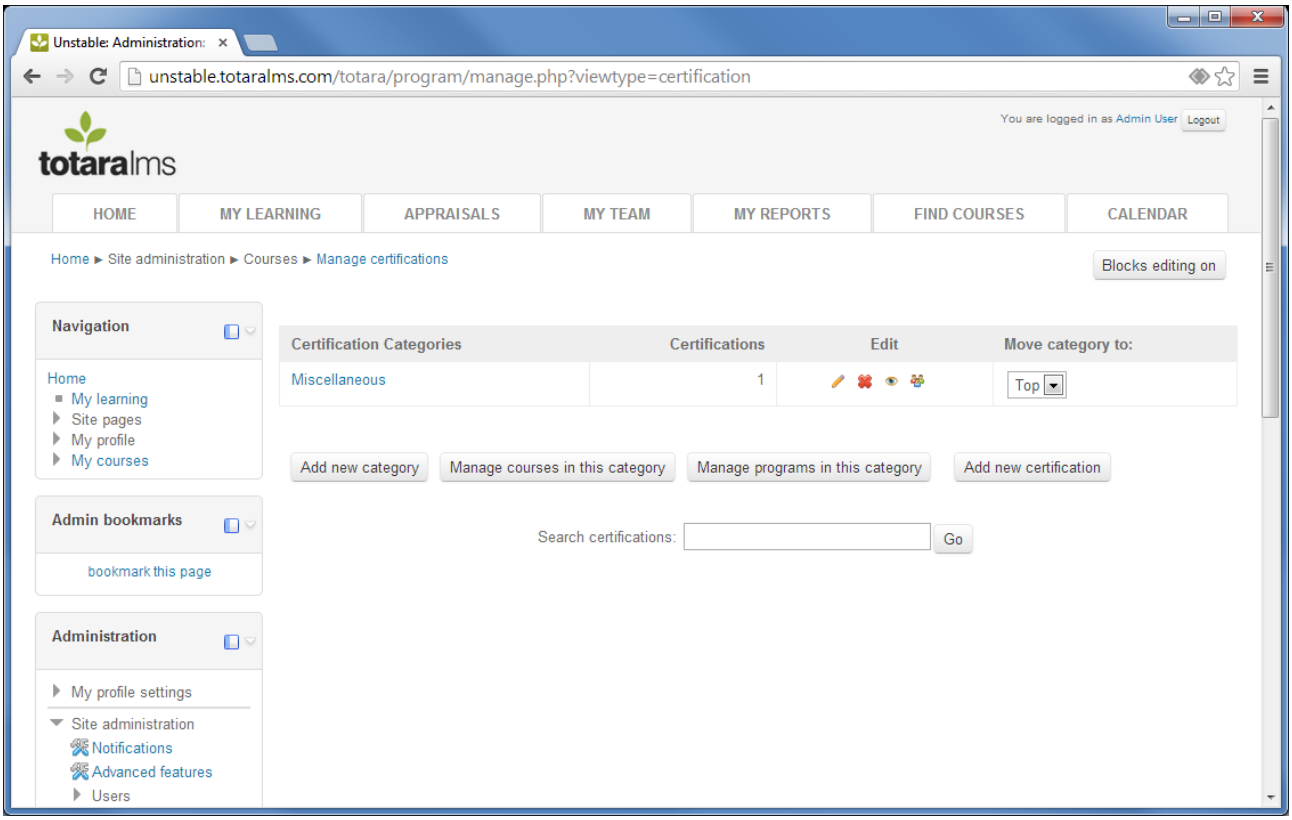
Certification

Site Admin > Courses > Manage Certifications

Manage Certifications

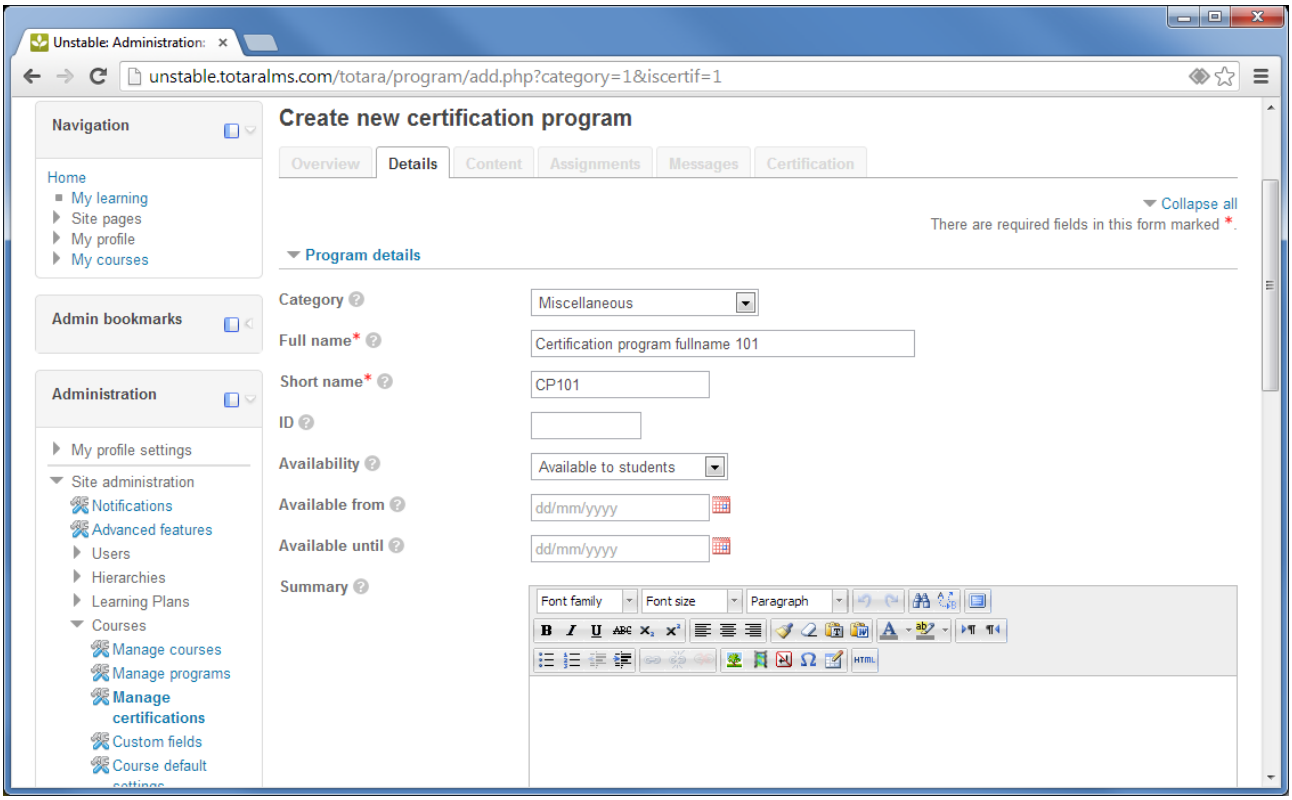
Certifications can be managed in the **Administration** block under **Site Administration > Courses > Manage certifications**.





Add a New Certification

To create a new certification, go to the **Administration** block and select **Site Administration > Courses > Manage certifications**. Click the **Add new certifications** button. If you do not see the **Add new certifications** button, click the **Manage certifications in this category** button first.



Category: Select the category this certification will be saved in. This choice will affect where your certification is displayed on the certification listing and may make it easier for students to find your certification.

Full name: The full name of the certification is displayed at the top of the screen and in the certification listings.

Short name: The program short name will be used in several places where the full name isn't appropriate (such as in the subject line of an alert message).

ID: The ID number of a certification is only used when matching this certification against external systems - it is never displayed within Totara LMS. If you have a code for this certification then use it here. Otherwise you can leave it blank.

Availability: This option allows you to hide the certification from learners. It will not appear on any listings, except to administrators.

Available from/until: If you set the 'Available from' and 'Available until' dates, learners will be able to find and enter the certification during the period specified by the dates but will be prevented from accessing it outside of those dates.

Summary: Enter a description of the certification which will be visible to learners in the catalog. The HTML editor allows you to format text as well as including links and embedding images or video.

Summary files: Certification summary files, such as images, are displayed in the list of certifications together with the summary.

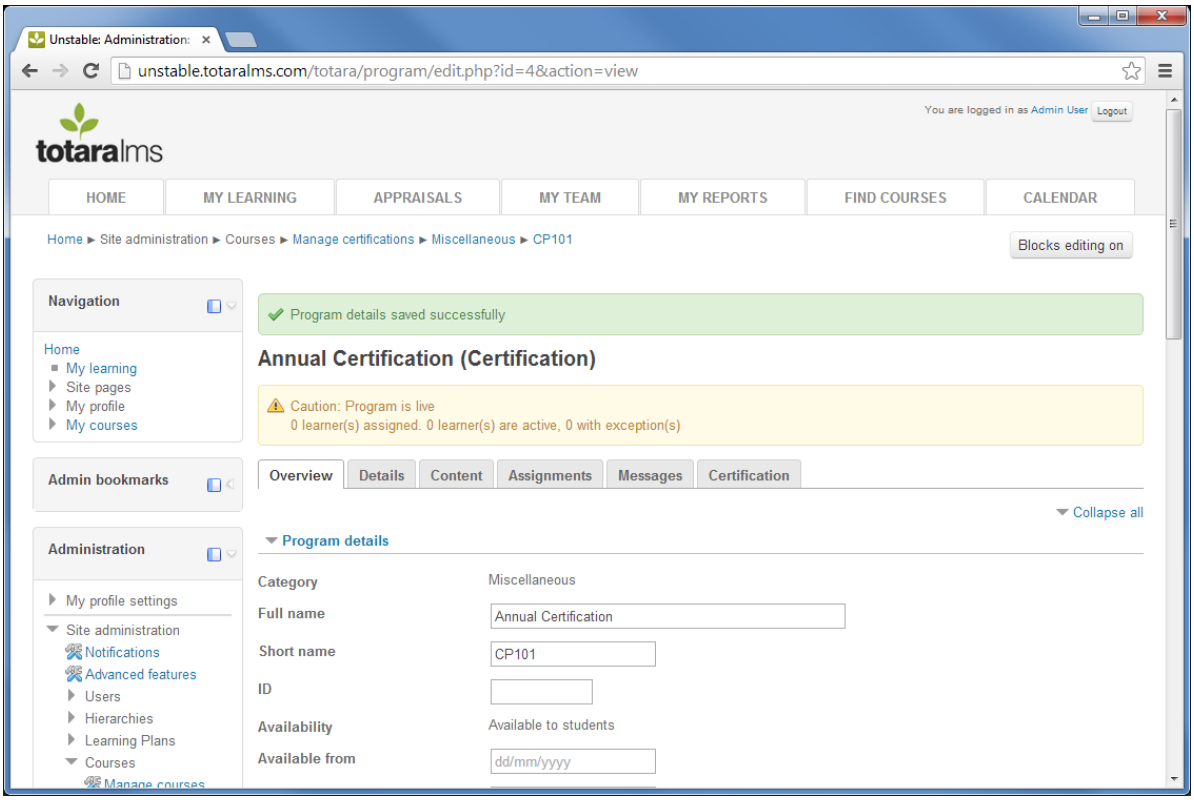
Endnote: Note to be displayed at the end of the certification.

Visibility: Enable audience-based visibility under Site admin>advanced features. If "Visible to members of the selected audiences" is selected then the certification is only visible to members of any of the assigned audiences. To choose audiences this certification will be visible to, click the **Add visible audiences** button. A dialog will appear allowing you to select the audience(s) who will see this certification. Click on the audience(s) and then click **Ok** to continue entering certification settings.

Note: Visibility does not imply enrollment in the certification. It makes the certification visible to the audience members who may be allowed to choose to enroll.

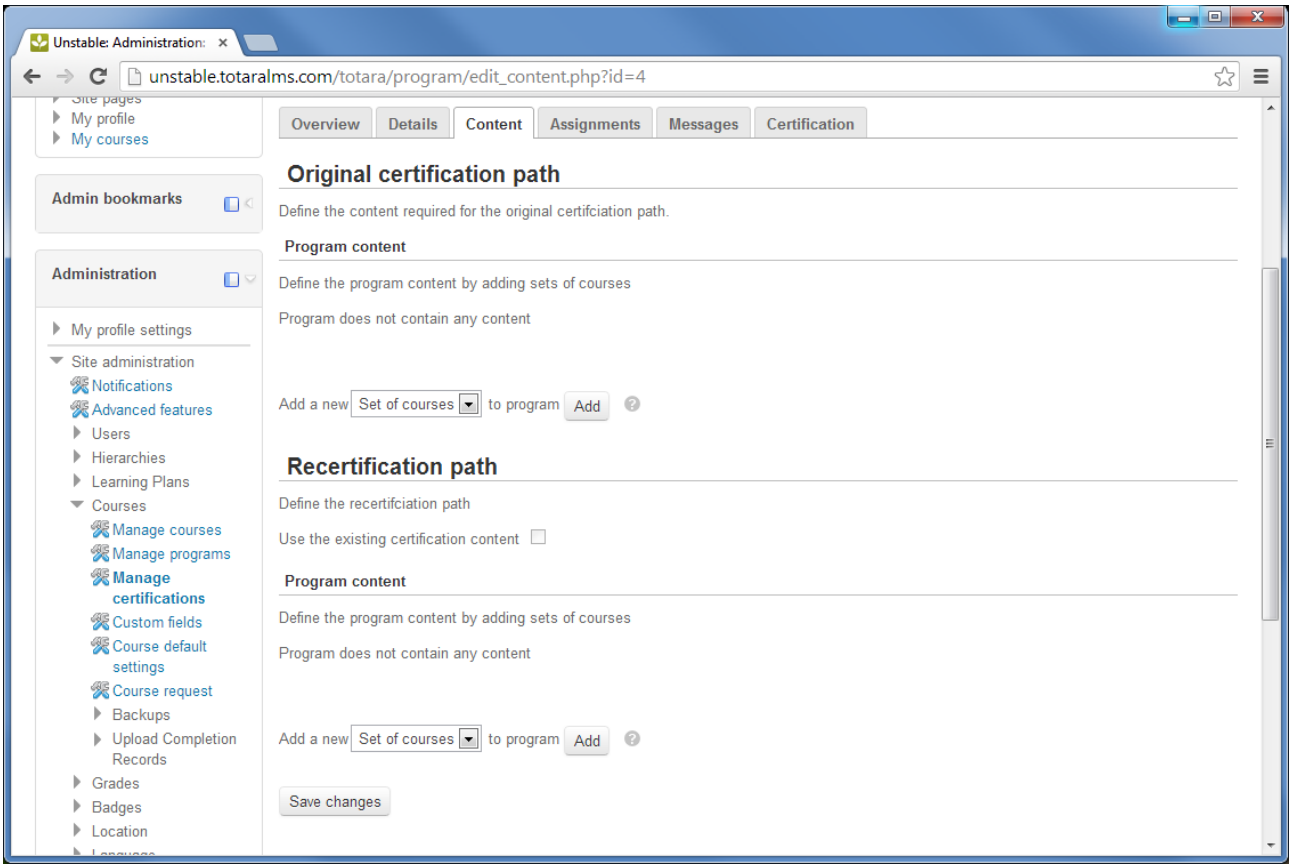
Current icon: Choose the icon to display in the catalog next to this certification. To choose a new icon, click the **Choose icon** button and select another image.

Click the **Save changes** button to create the new certification details.



Manage Certification Content

Click the **Content** tab to select the courses and programs learners will complete as a part of this certification.



Certifications can include two paths or series of learning content: an initial certification path and a recertification path. For example a new employee is hired and assigned to complete the certification. They need to complete a one-time orientation eLearning course and a health and safety training course, including a face-to-face workshop to learn CPR. One year later staff members only need to retake the health and safety training to assess their understanding of new safety standards and recertify in CPR. The original certification path includes the orientation course and the health and safety course. On the employee's one year anniversary, they begin the recertification path which includes automatic notification and enrollment in the Health and Safety course only.

Original Certification Path

To create the original certification path, click the **Add** button next to **Add a new Set of courses to program.**

By adding sets of courses you can build up the learning path of the certification program. Once sets are added the relationships between them can be defined.

Once a number of sets have been created, set dividers are employed to allow the creation of sequences (i.e. dependencies) between each set. An example program with four course sets defined could have dependencies as follows:

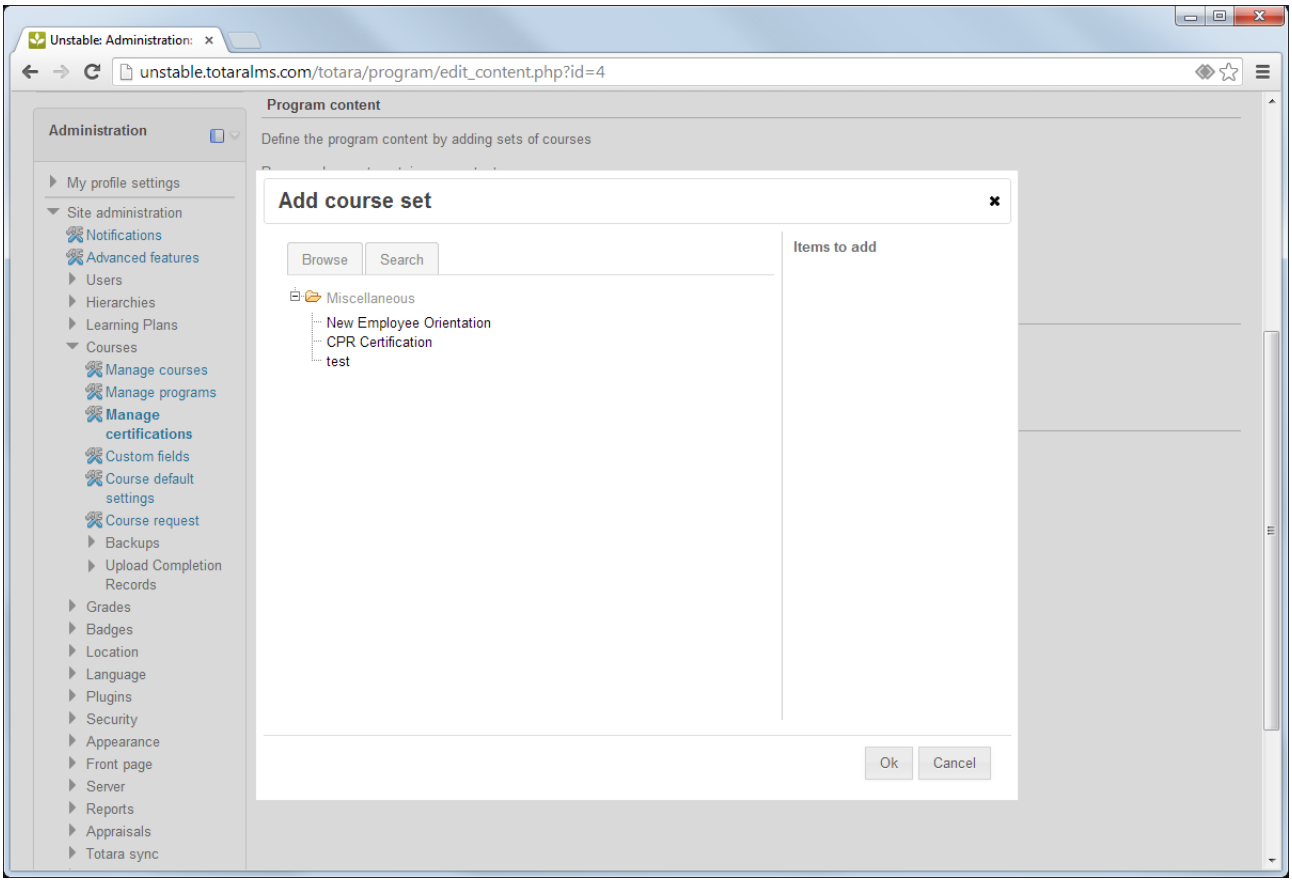
From set one the learner must complete one course (courseA or courseB) before proceeding to set two.

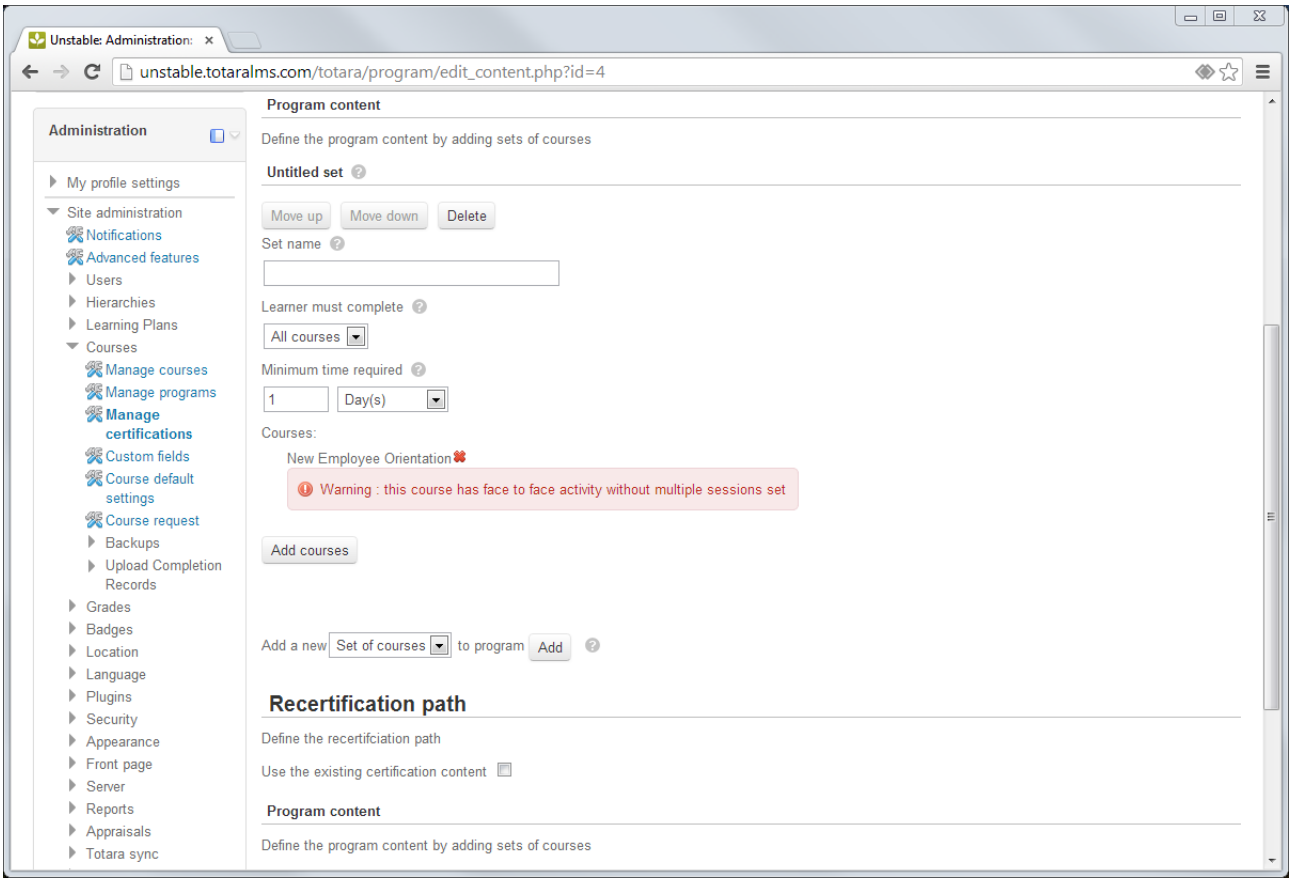
From set two the learner must complete all courses (courseC and courseD and courseE) before proceeding to set three or set four.

From set three the learner must complete one course (courseE) or all courses from set four (courseF and courseG).

Once the learning path is completed, the learner has finished the certification program.

Click on the name of each course which will be a part of the first set. When the correct course(s) are displayed in the **Items to add** column, click the **Ok** button. To remove a course from the **Items to add**, hover over the name and click the red X.





Set name: Use the course set label to describe the grouping of courses within the set. Learners will see this text when they are working through a certification. The aim is to make each set more readable and aid the Learners' understanding of the learning path. For example the first set of courses could be called "Phase One - Orientation" and the second set of courses "Phase Two - Health & Safety".

Learner must complete: If multiple courses have been added to the set, choose whether the learner needs to complete only one or all of the courses in the set.

Minimum time required: This value indicates a minimum amount of time it would take a learner to complete the course set. It is used to determine if the completion period set on the **Assignments** tab is realistic for a particular group of learners. If the assignment is not realistic, a "time allowance" exception will be generated and the learner will not be assigned to the program until the exception has been resolved.

For example, consider a program consisting of a single course set with a minimum time required of 10 days. If a learner was assigned with completion criteria requiring them to complete it in less than 10 days, then it would raise an exception report for the learner and alert the site administrator.

When using completion criteria relative to a learner, it is possible for some learners to generate exceptions but not others - for example when using the "days since first login" criteria, each learner would have their own deadline which may or may not be realistic.

When multiple course sets exist in a program the overall minimum time required for the program is calculated based on the worst-case scenario taking into account the course set logic. For example if a program consists of:

Course set1 [10 days] THEN Course set2 [5 days] OR Course set3 [7 days]

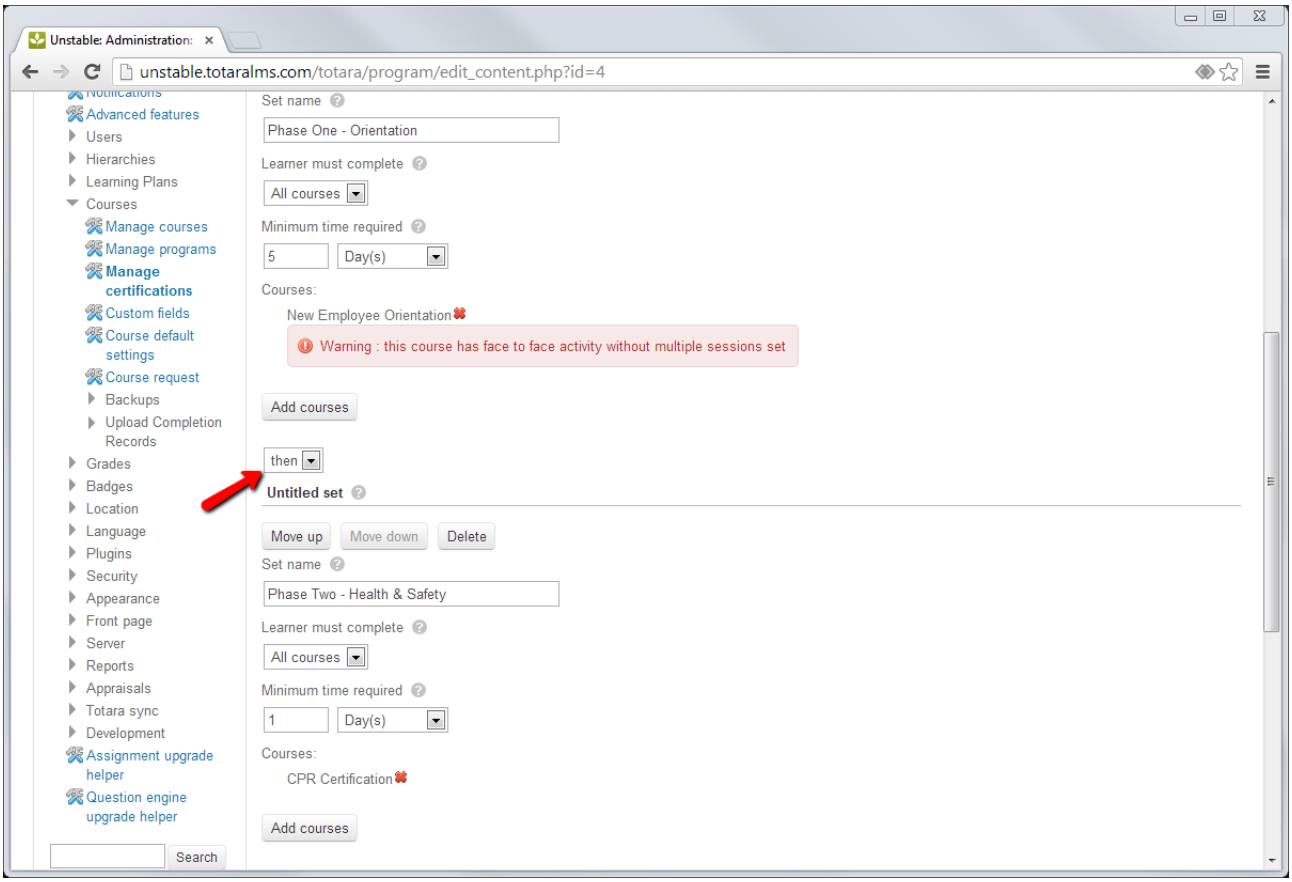
then the overall time allowance would be 17 days.

Enter zero if no time limit is required.

Courses: The list of courses selected for this set are displayed. Click the red X next to any course to remove it from the set. You may also see warning messages based upon the courses selected. In the sample above, the course contains a Face-to-face activity with only one session, which could cause an issue if the learner is working on the course when no sessions are available.

Add courses: Click the **Add courses** button if additional courses need to be added to this set.

To add another set of courses to this certification, click the **Add a new set of courses to program**. The steps above for selecting courses and setting course set details will need to be completed for the additional set.



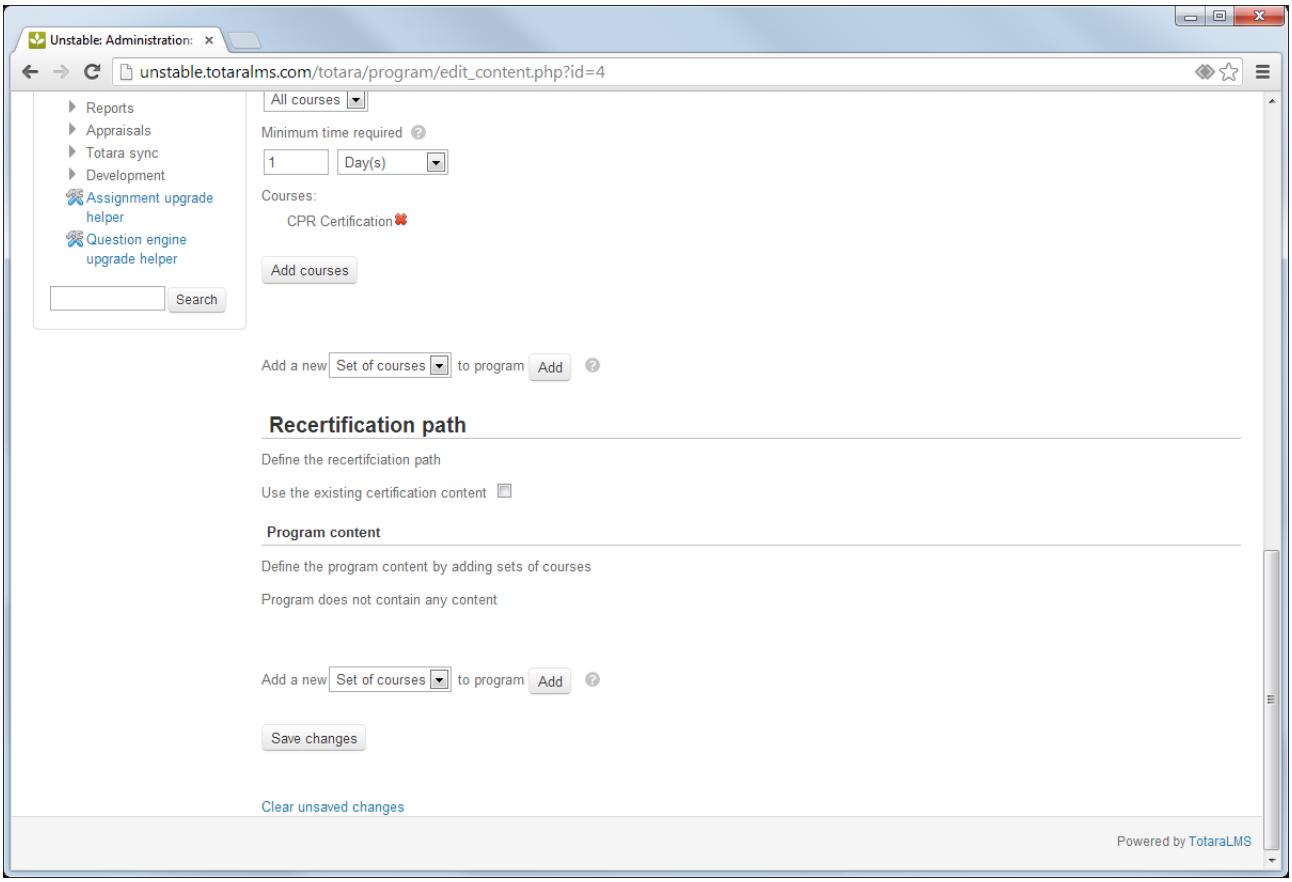
After creating an additional set, be sure to setup the relationship between the prior course set and the new one. Above the set title, a menu will appear with the choices “and” and “then”. This allows you to control the relationship between the course sets. For example,

“Complete the first set THEN complete the second set” will prevent the learner from accessing courses in the second set until after the first set has been completed.

“Complete the first set AND complete the second set” will allow the learner to complete the courses within both sets in any order for a certification with a goal of the learner completing both sets without any prerequisite work required.

Recertification Path

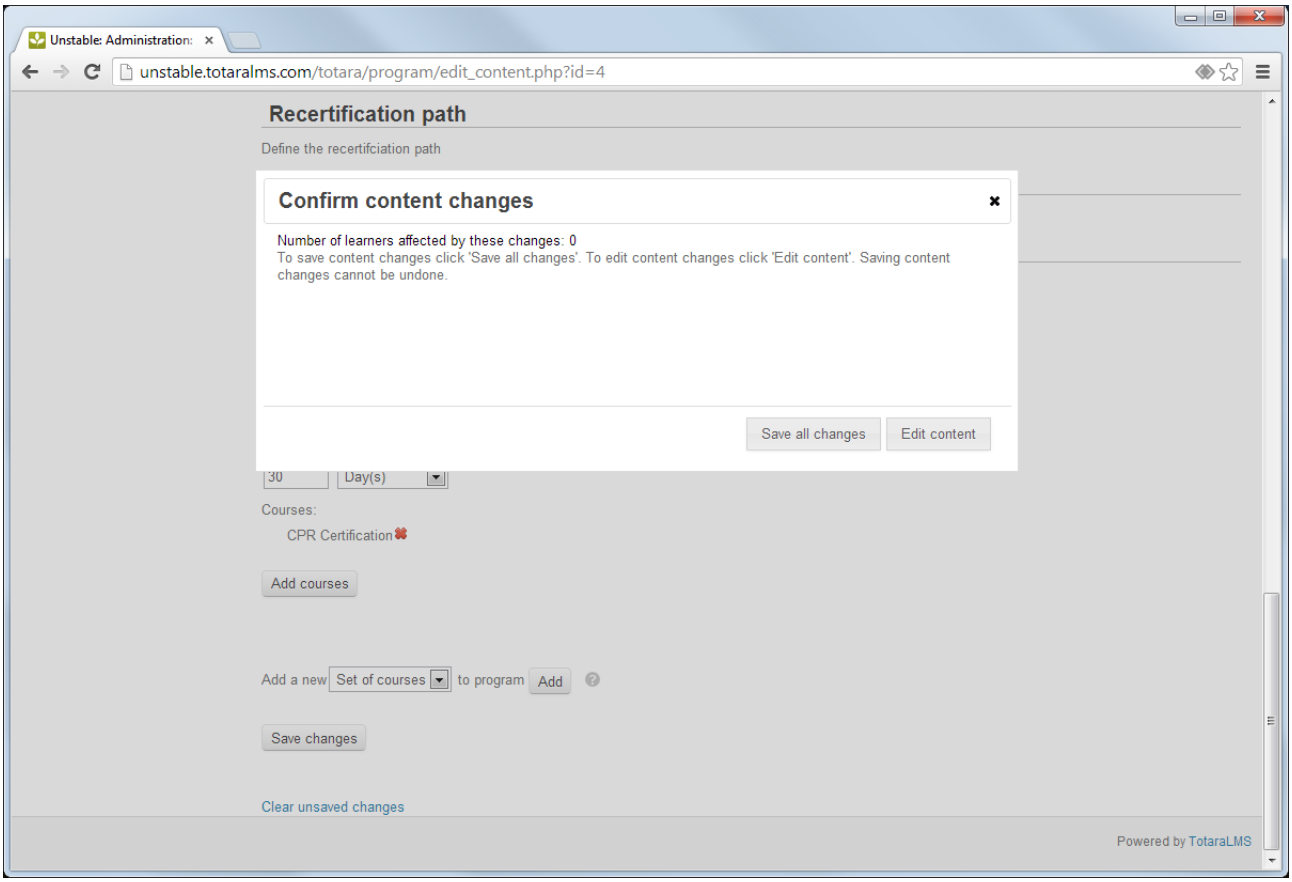
Next we will define the recertification path. This is the part of the certification the learner will need to retake as frequently as you define. In the previous example the learner would take the orientation and health and safety courses once and then repeat the health and safety course annually.



If the recertification path will include the same course sets and complete requirements as the original certification path tick the check box next to **Use the existing certification content**.

To create a new path, click the **Add** button next to **Add a new set of courses to program**. Add course sets including their description, relationships and completion requirements as described for the original certification path.

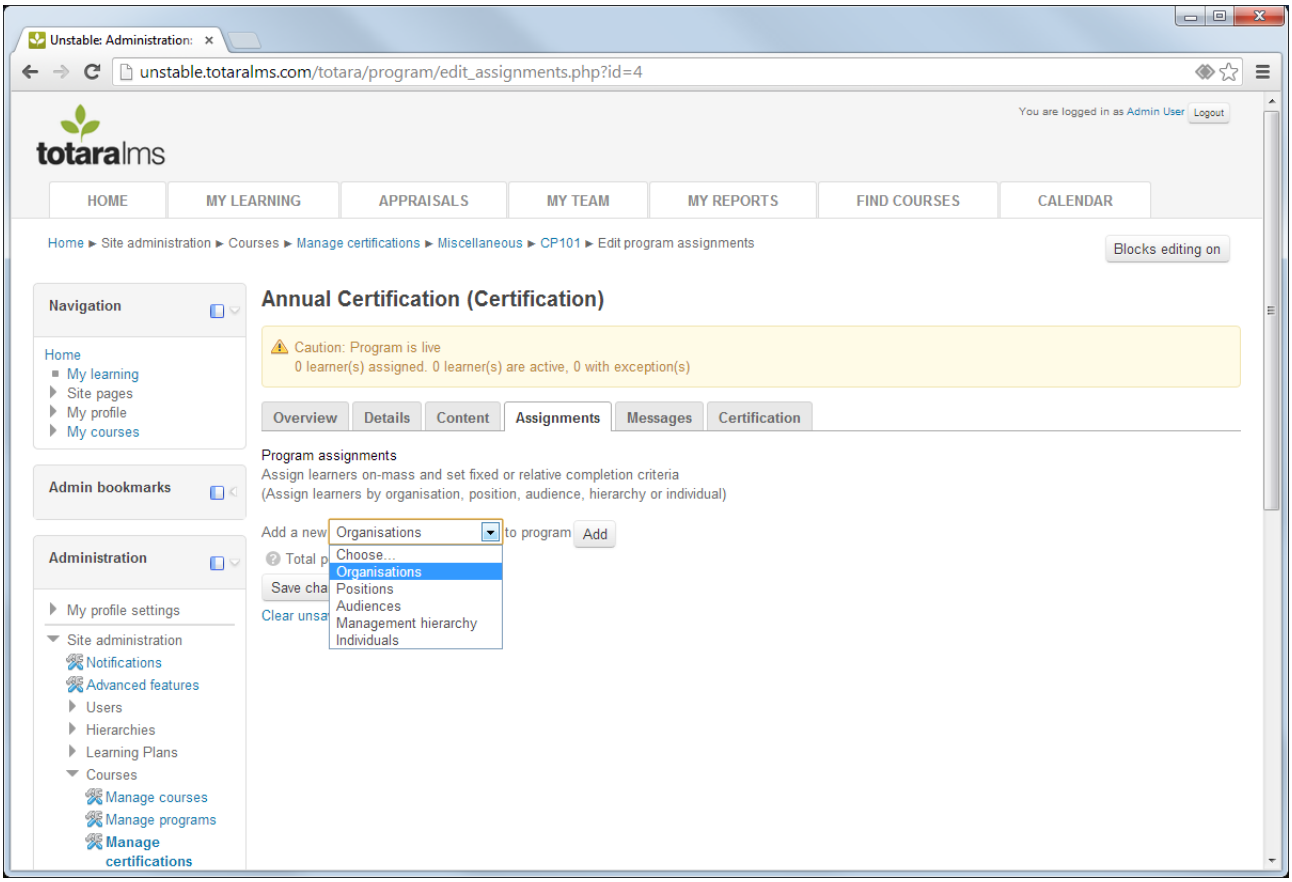
When both paths have been created, click the **Save changes** button at the bottom of the page.



The number of learners who are currently assigned to the recertification and would be affected by changes are displayed. Click the **Save all changes** button to continue or **Edit content** to go back to the Content editing tab.

After saving, click on the Assignments tab to assign the learners to take the certification.

Assignments



Learners can be assigned to complete the certification based on their organisation, position, audience, hierarchy or as an individual. When a new learner is assigned to a group such as an organisation, position or audience they will automatically be assigned to the certification.

Note: As soon as learners are enrolled in the certification, they will automatically receive an enrollment notification message via email and on their dashboard. Many administrators choose to customize the messages prior to setting up enrollments. Click on the **Messages** tab and jump ahead to the **Messages** section of the documentation.

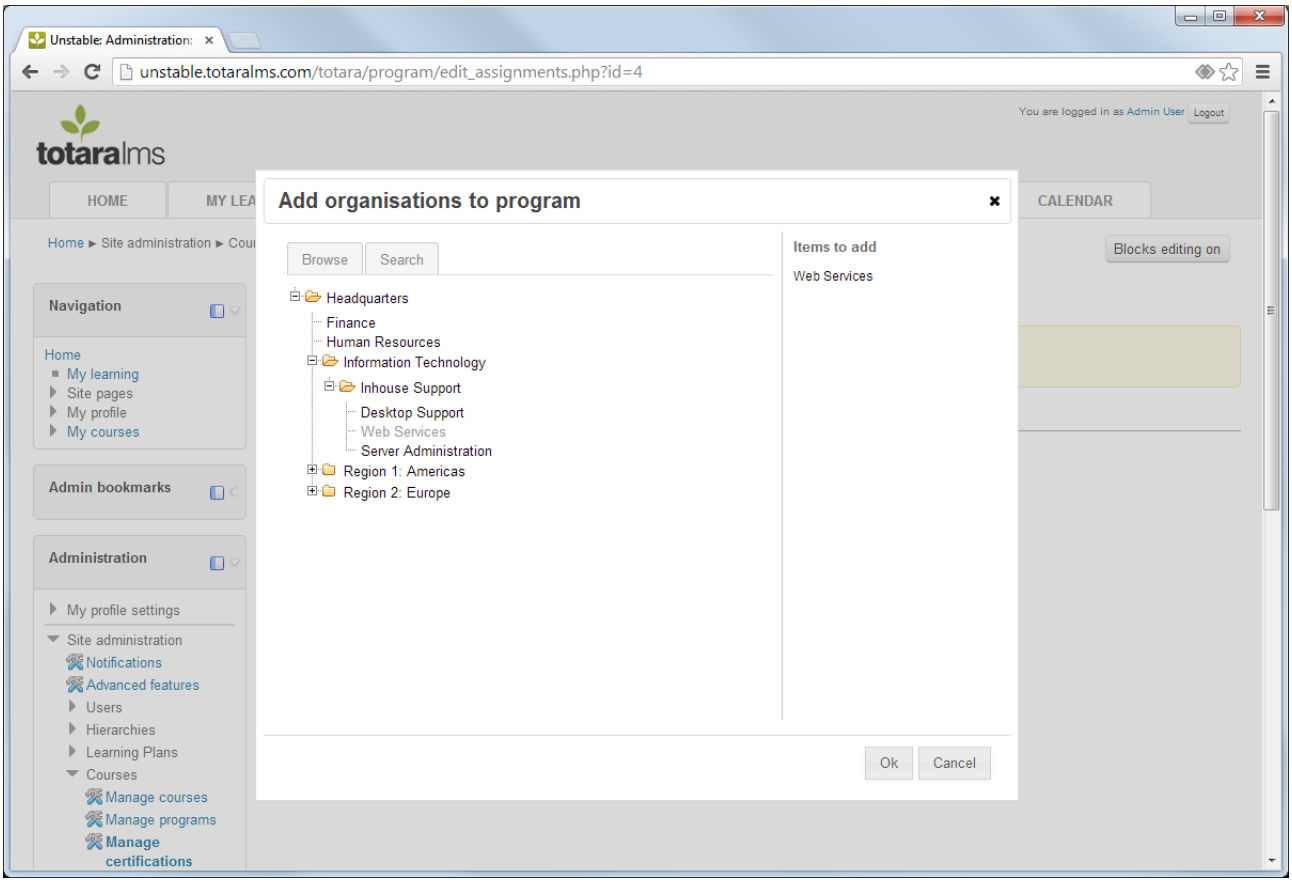
To add the learner's organisation or position from the hierarchies' framework select **Position** or **Organisation** and click the **Add** button.

To add an audience, select the **Audiences** option and click **Add** to be presented a list of audiences to select from.

To add learners based upon their assigned Staff Manager, click the **Management hierarchy** option to be presented a list of users who have been assigned the role of Staff Manager (i.e. they have been assigned as the **Manager** on at least one learner's profile).

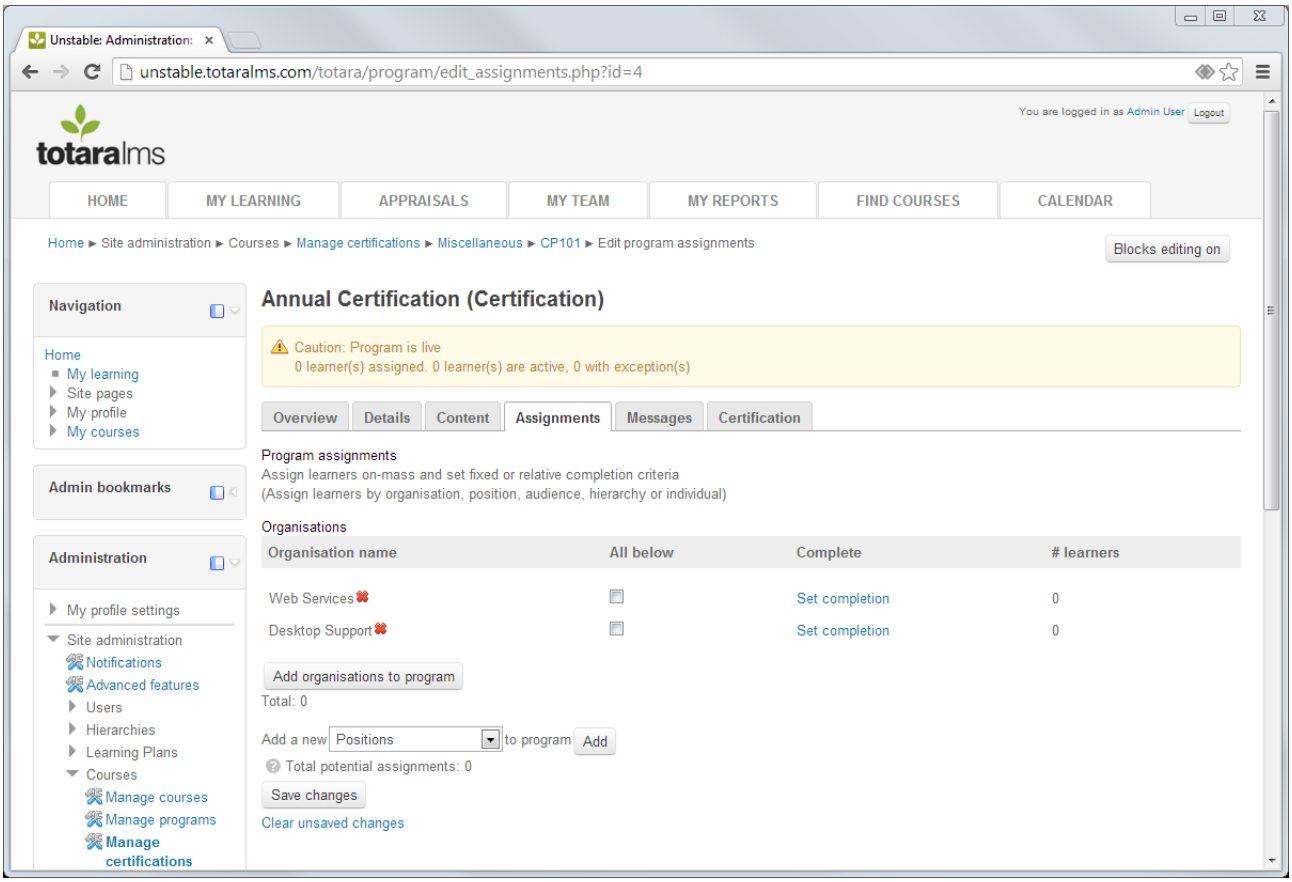
To select learners by name select the **Individuals** option and click the **Add** button.

A dialog box appears and displays the item selected above, which could include frameworks, lists of users or a list of audiences.



Click on the name(s) of the item(s) to assign. Selected items will appear in the **Item to add** list. To remove an item, hover over the name in the **Items to add** column and click the red X.

After selecting items, click the **Ok** button.

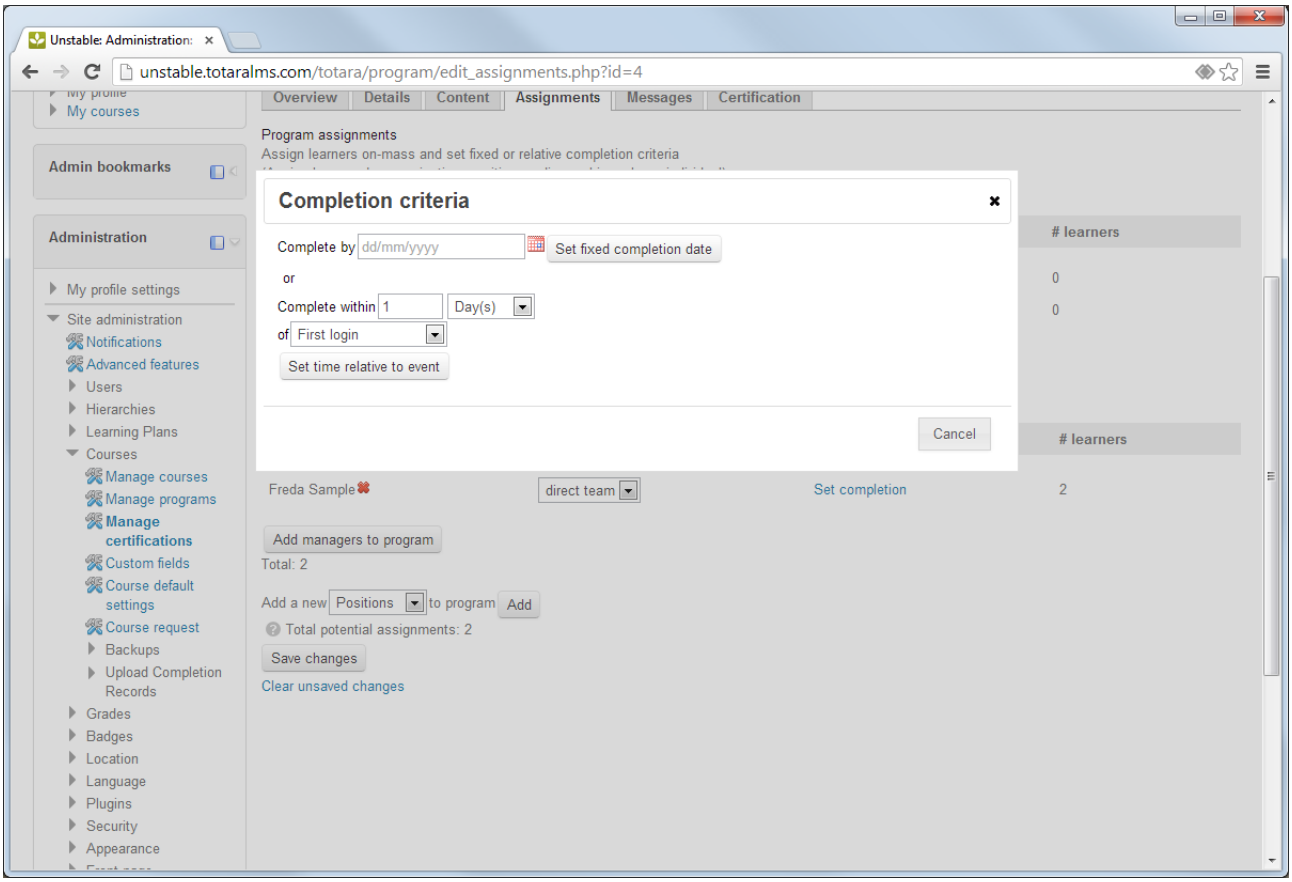


Selected items will appear on the assignments tab grouped by type. To remove an assignment, click the red X next to it.

The **All below** checkbox allows you to include sub-items of those selected. This could include sub-organisations or subordinate positions in the hierarchy structure.

If you have chosen a Management hierarchy, the **For** dropdown allows you to select whether the assignment applies to the Staff Manager's "Direct Team"(only those learners who have this Staff Manager set on their user profile) or "All below" (all learners who are below this Staff Manager and this Staff Manager's staff members).

For each group of learners, click the **Set completion** link to set completion rules.



Fixed Completion Date

Complete by allows you to enter a fixed date by which all learners in this group will complete the certification. This is used if everyone will have the same due date, such as an annual certification learners must complete by December 31. Type the date in the format shown or click the calendar icon to select the date. Click the **Set fixed completion date** button to save the change.

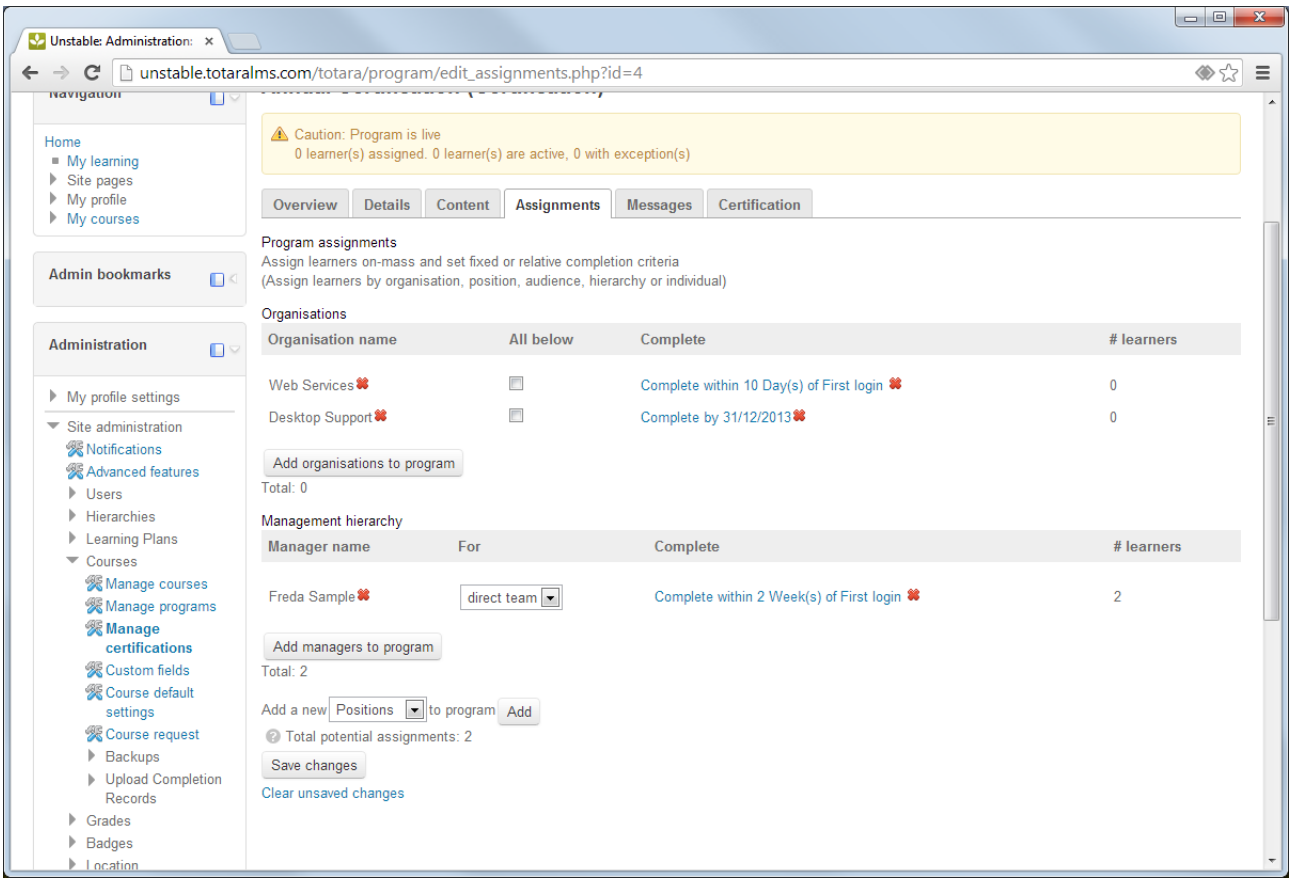
Relative Completion Date

The second option allows you to choose a completion date relative to each learner. Enter the number of Days, Weeks or Months and select the timeframe from the drop down. Then select the event the timeframe is relative to including:

> **First login:** The first time the learner logged into Totara LMS.
>
> **Position start date:** The date the learner started a position. After selecting this option in the drop down you will be prompted to select the position this is referring to.
>
> **Program completion:** The date the learner completed a program. After selecting this option in the drop down you will be prompted to select the program this is referring to.
>
> **Course completion:** The date the learner completed a course. After selecting this option in the drop down you will be prompted to select the course this is referring to.

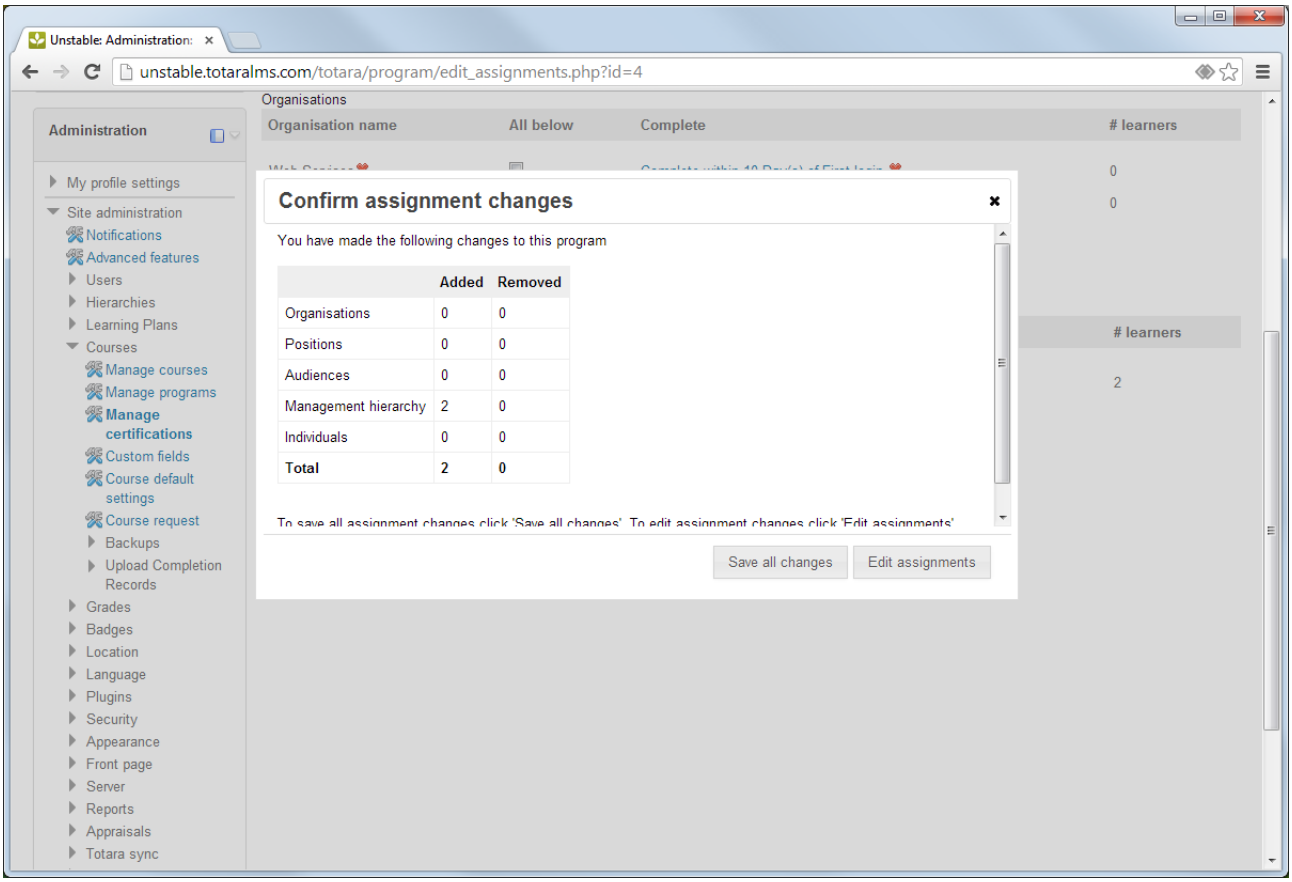
Profile field date: The date contained in a custom user profile field. After selecting this option in the drop down you will be prompted to select the date field this is referring to.

After setting a timeframe and selecting the event, click the **Set time relative to event** button to save this setting.



Any completion criteria will be displayed along with the number of learners (**# learners)** currently in the group.

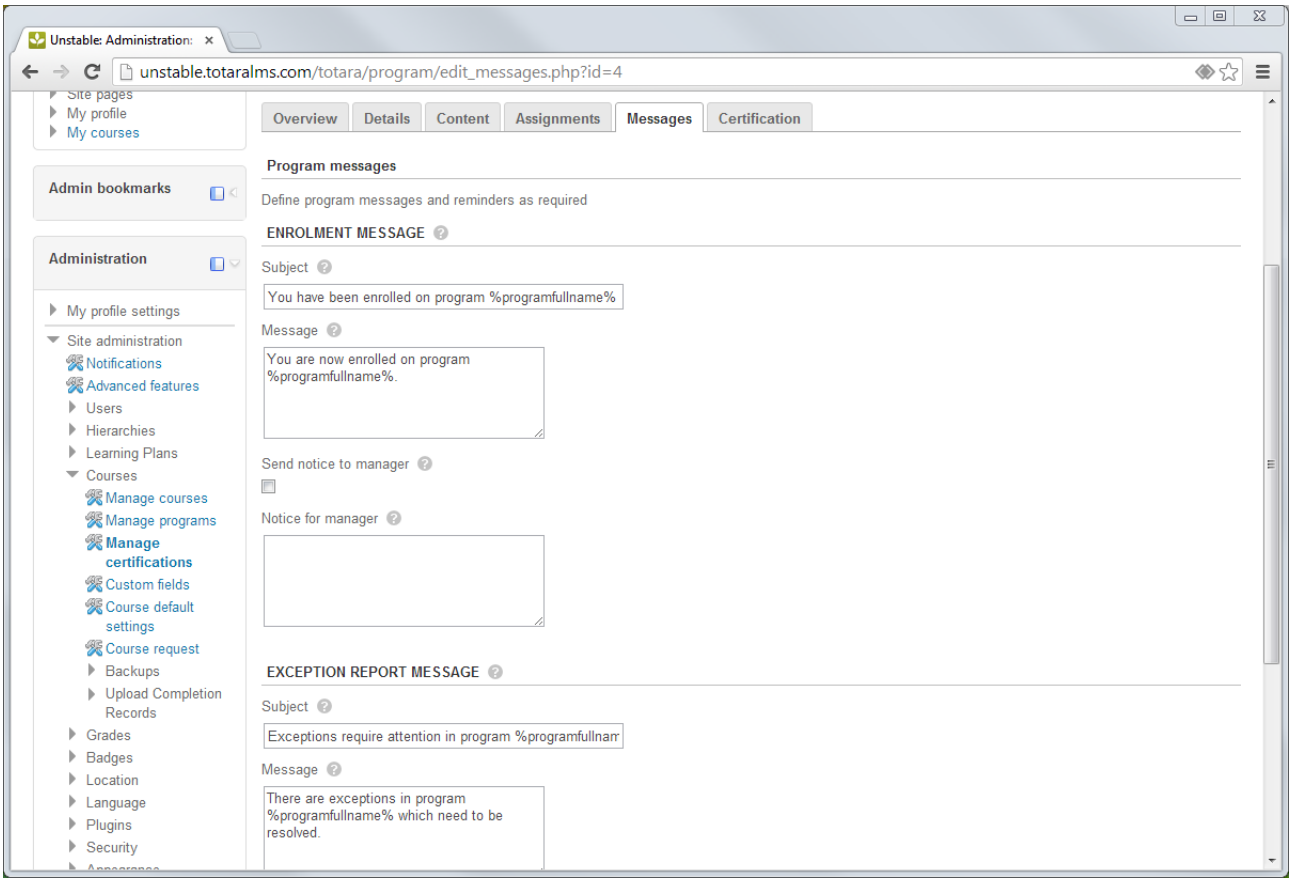
Add additional program assignments as needed. Click the **Save changes** button at the bottom of the page.



A dialog will appear displaying the number of learners who will be added or removed based upon the changes made to the Assignments. Click the **Save all changes** button to continue.

Click on the **Messages** tab to setup notifications for the certification.

Messages



Notification messages can be sent to the learner and the learner's manager (the user assigned as their Manager on the user profile). Messages can be sent based on events such as the learner being enrolled in the program, due dates coming up, etc.

Variable substitution

In certification messages certain variables can be inserted into the subject and/or body of a message and be replaced with real values when the message is sent. The variables should be inserted into the text exactly as they are shown below. The following variables can be used:

%userfullname% This will be replaced by the recipient's full name

%programfullname% This will be replaced by the program's full name

%setlabel% This will be replaced the course set label if the message relates to a course set.

Create a New Notification

To create a new notification, click the **Add a new** drop down at the bottom of the page. Events triggering a notification to be sent include:

Enrolment: This message will be sent when the learner is enrolled in the certification.

Exception report message: This message will be sent to the site administrator whenever new exceptions are added to a certification's exception report. Exceptions occur when a learner's due date conflicts with the **Minimum time required** for the course sets within the certification.

Un-enrolment: This message will be sent when the learner is un-enrolled from the certification.

Program due: This message will be sent at an administrator-specified time interval (days, weeks, months or years) before the certification due date set on the **Assignments** tab.

Program overdue: This message will be sent at an administrator-specified time interval (days, weeks, months or years) after an uncompleted certification has passed the due date set on the **Assignments** tab.

Course set due: This message will be sent at an administrator-specified time interval (days, weeks, months or years) before the course set is due. The date is based on the **Minimum time required** value for this course set on the **Content** tab in relation to the overall certification due date set on the **Assignments** tab. For example, a certification is due within 30 days of first login. The minimum time required for course set A is 10 days and course set B is 20 days. If the learner logs in for the first time on January 1st, then course set A is due on Jan 10th and course set B is due on Jan 30th.

Course set overdue: This message will be sent at an administrator-specified time interval (days, weeks, months or years) after the course set is overdue. The date is based on the **Minimum time required** value for this course set on the **Content** tab in relation to the overall certification due date set on the **Assignments** tab. In the example above, if a learner has not completed the certification, then it is considered overdue as of January 31st.

Course set completed: This message will be sent when the courses within a course set are complete.

Learner follow-up: This message will be sent at an administrator-specified time interval (days, weeks, months or years) after the certification has been completed.

Recertification window open: This message will be sent when a learner has entered the period when they can recertify.

Recertification window due to close: This message will be sent at an administrator-specified time interval (days, weeks, months or years) before the recertification period is about to expire.

Failure to recertify: This message will be sent when a recertification period has expired and the learner will need to repeat the original certification.

Subject: The subject of the message will be displayed to message recipients in their dashboard and will also be the subject line of the email. Maximum length of the subject line is 255 characters. The subject can contain the variable substitutions defined above which will be replaced when the message is sent.

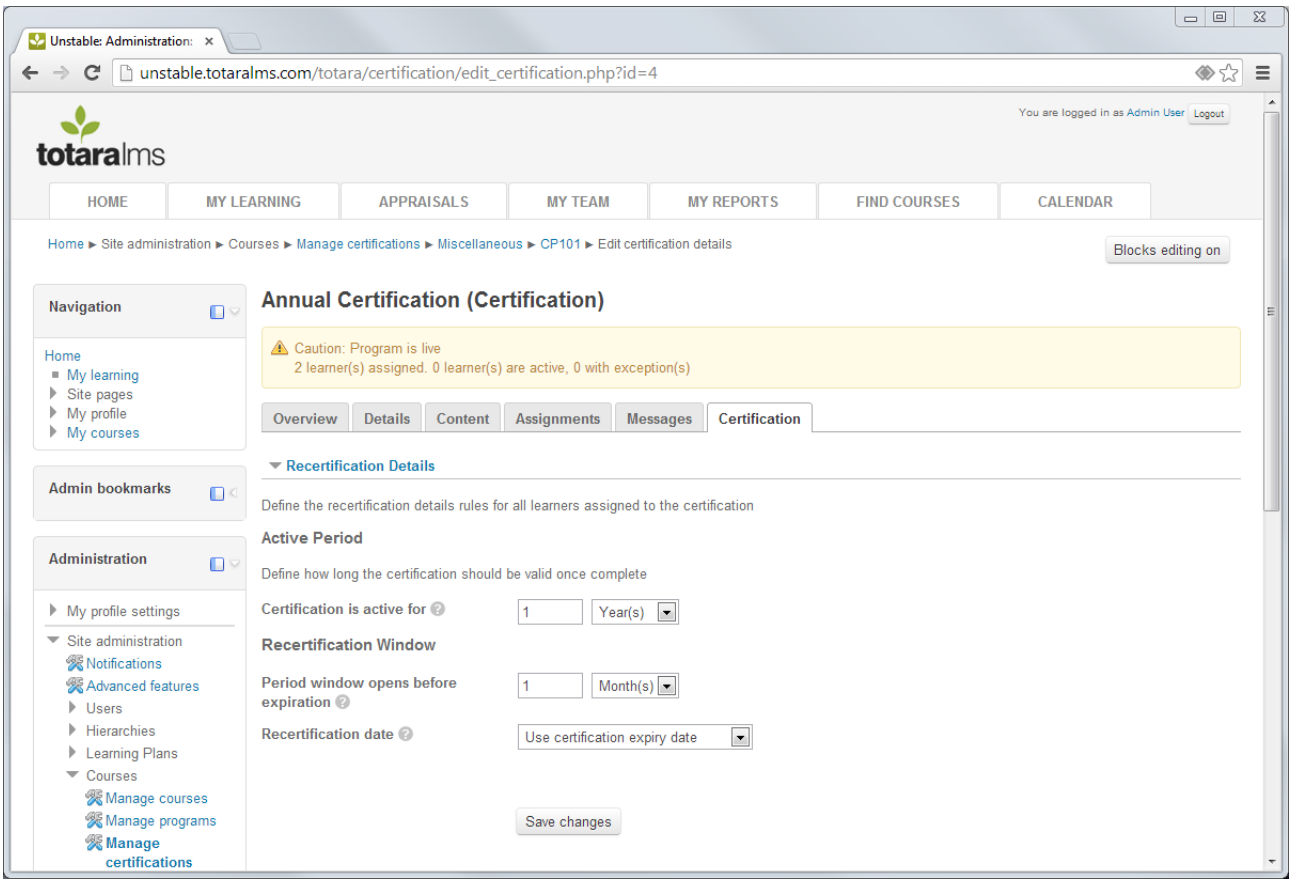
Message: The message body will be displayed to message recipients in the **Alerts** block of their **My Learning** dashboard. The message body can contain variables which will be replaced when the message is sent.

Click the **Save Changes** button at the bottom of the page.

Totara LMS will check for notification messages needing to be sent every time cron runs. Check with your server administrator to find out how frequently cron is set to run.

Certification

The Certification tab allows you to define how long a certification is active. Click the **Certification** tab.

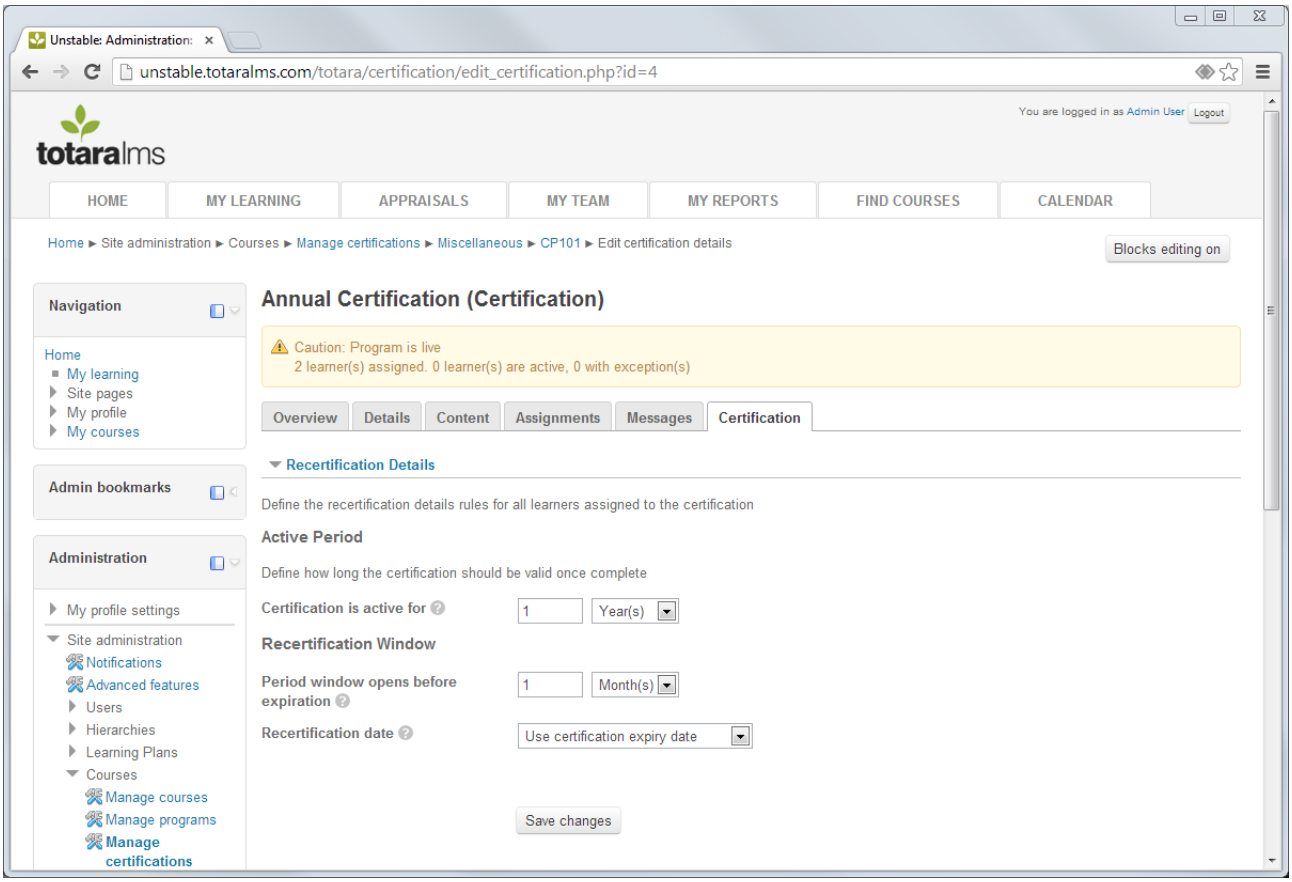


Certification is active for: Enter the period of time (in days, weeks, months or years) during which the certification is active for before it expires.

Period windows opens before expiration: Enter the period of time (in days, weeks, months or years) before certification expires that a learner can start recertifying.

Recertification date: Choose whether the recertification due date is based on the **Certification expiry date** or the **Certification complete date**.

Click the **Save changes** button.

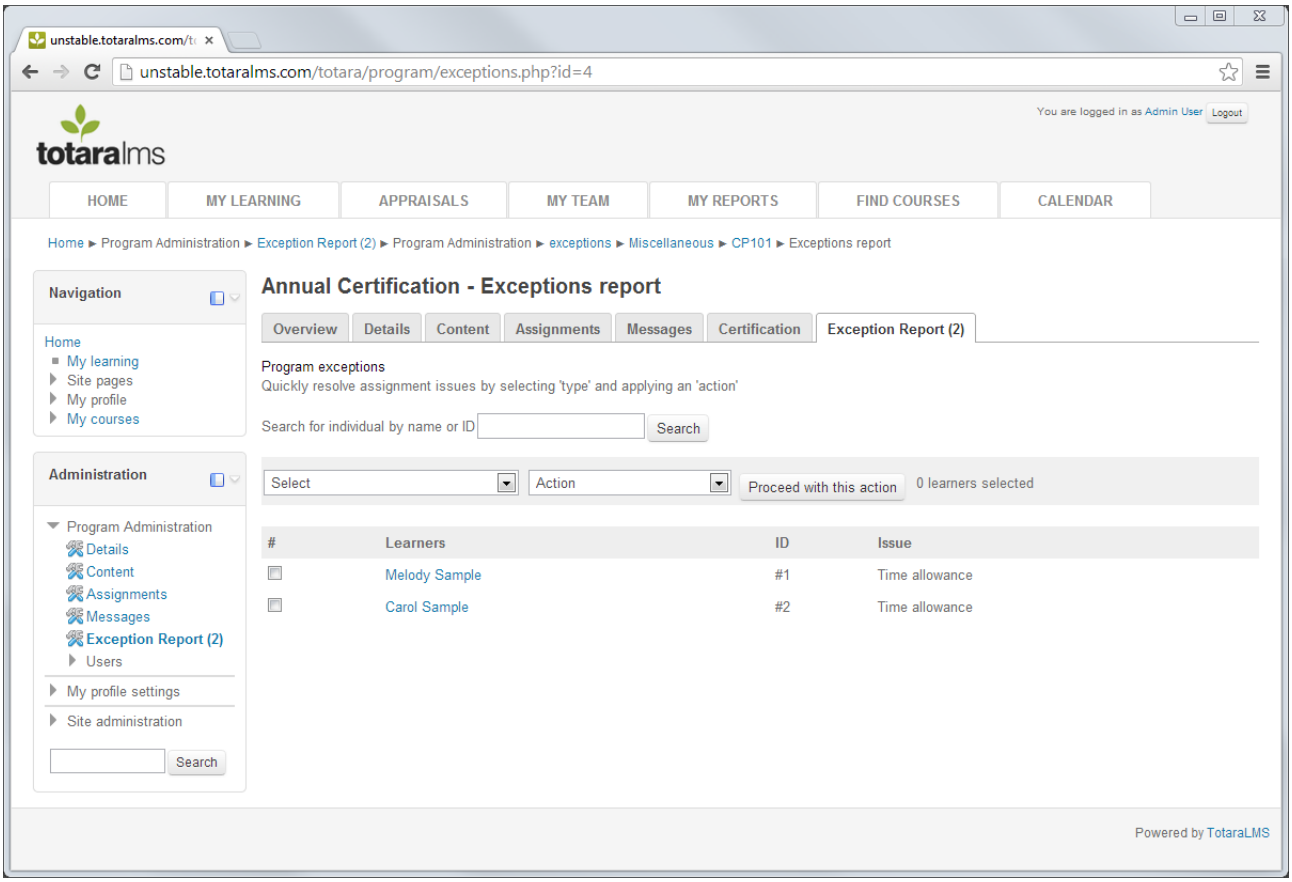


Exception Report

The **Exception report** tab will appear if there is a conflict between the amount of time a learner has been given to complete a certification on the **Assignments** tab and the minimum amount of time the certification requires on the **Content** tab.

The tab only appears when an exception needs to be resolved. Totara LMS will also send email and dashboard notification messages to the Site Administrator.

Click on the **Exception report** tab.



The learners who are assigned to the certification and have an exception are listed, including the **Issue** encountered. To fix the exceptions, choose learners by clicking the check box next to their names or select learners in groups using the **Select** drop down. Options include:

- **All learners:** Select all learners regardless of the type of exception encountered.
- **All time allowance issues:** Select only learners with time allowance exceptions.
- **All currently assigned issues:** Select only the learners already assigned to the program.
- **All completion time unknown issues:** Select only learners with exceptions due to a completion time having not been defined.

Select the **Action** to take for the selected learners. Options include:

- **Set realistic time allowance**: Allow the system to update the learner's due date to give them the minimum time required for each course set on the **Content** tab.
- **Override and add program:** Assign the certification to the learner leaving the completion requirements as is.
- **Dismiss and take no action:** Clear the exception and take no action.