Session 5: Building Custom Credentials – Quick Reference Guide

Manage Credentials Overview

TargetSolutions Manage Credentials Application features a set of tools that help organizations track and maintain credentials, certifications, qualifications and other types of user information. In addition, credentials can also be used to create Learning Tracks to deliver bundles of training to specific user Groups. TargetSolutions has two main Credential types, which are Certified and Custom.

Certified Credentials

The requirements for each Certified Credential are defined by an accredited third party and created by TargetSolutions. These Credentials correlate with the Certification Tracker and cannot be altered – meaning courses cannot be deleted from them. However, additional courses and/or activities created with the Activities Builder Application can be added to certified credentials. Certified Credentials are only available if you have purchased premium content.

Custom Credentials

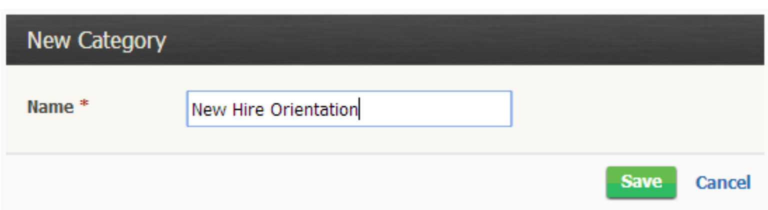
Custom credentials are created by administrators to track and maintain specific certifications or to deliver training using learning tracks.

These credentials may include any courses and/or activities that meet the minimum requirements as outlined by your organization's training and records management strategy.

How to Create a New Category

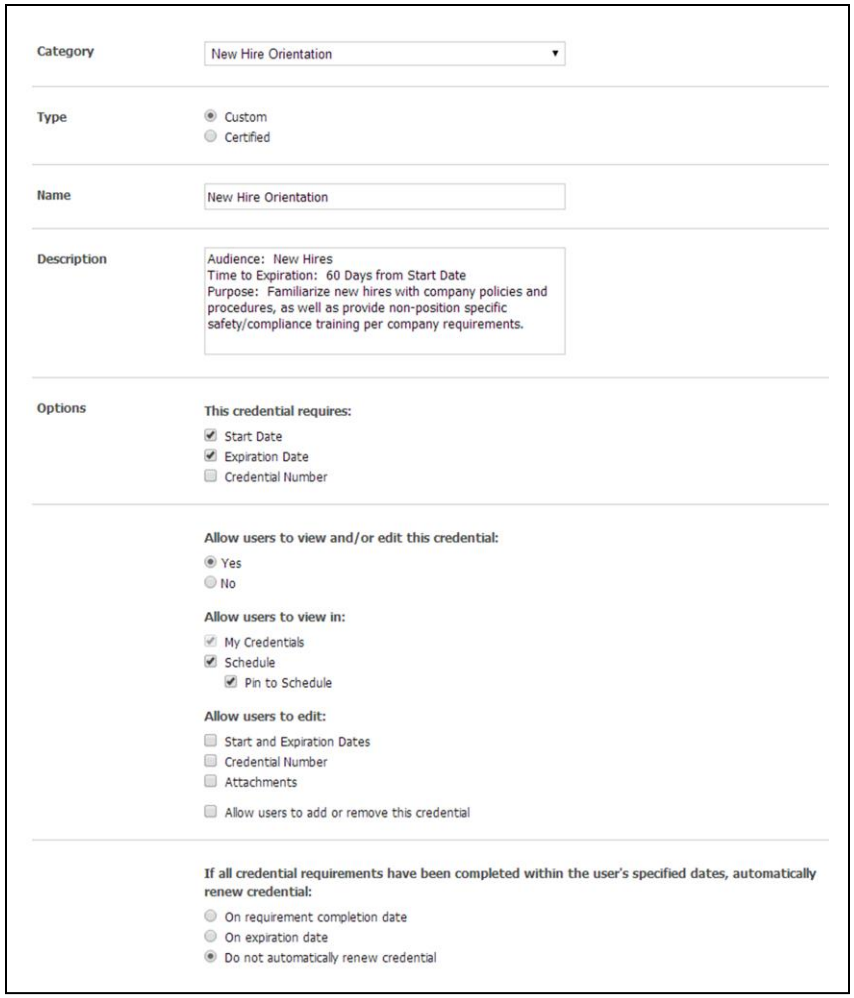
Prior to creating any new Credentials, Administrators need to create a new Category to drop them into. This helps keep credentials organized.

1. Click on Manage Credentials which is in the Administration tab.
2. Click New Category.
3. Enter the New Category Name and Click Save.



The newly created category will look like this:

How to Create A New Credential – Credential Options



1. Click **New Credential**.
2. Choose a Category from the drop down box.
3. Leave the Type as Custom.
4. Enter a Credential Name in the Name Field.
5. Enter a Description in the Description Field.
6. Choose the appropriate Options:

Start Date is the date the Credential will begin to accept requirement completions.

Expiration Date is the date the Credential will stop accepting completed requirements.

Credential Number is the number associated with a Certification, such as a Driver's License Number.

Allow users to view and/or edit this credential – Choose "Yes" if you want your users to be able to view and/or edit the credential.

Allows Users to View In – This will let us determine where the user can access their credential.

My Credentials – By default all credentials will be accessible in My Credentials on the Home page as long as we choose to allow users to view it by having selected "Yes" in the ***Allow users to view and/or edit the credential*** section.

Schedule – If you would like, you can allow users to access the credential in their Schedule on the home page by choosing that option. You can also "***Pin***" the credential to their Schedule, which keeps the Credential at the top of the Schedule until it is complete.

Allows users to edit – This section allows the Administrator to give the users access to edit their own credential. If you do not wish them to have this access, simply leave all boxes unchecked.

Auto Renew Feature – This allows the Administrator to set up pre-existing parameters to allow the credential to automatically renew. The Auto-Renew feature will only renew credentials for which all requirements have been met on or before the Expiration date.

On requirement completion date – The credential will auto-renew and become accessible on the day after each individual user completes the requirements assigned to this credential ***as long as the requirements are completed before 12 a.m. on the date of expiration***.

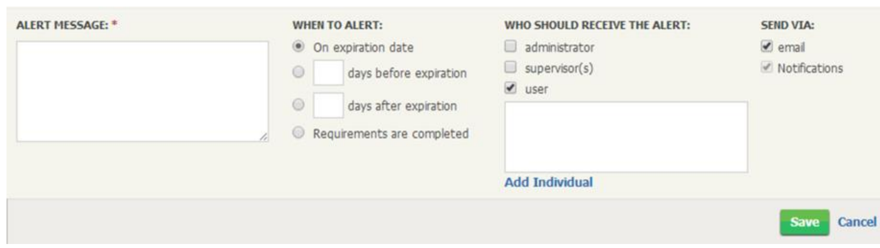
On expiration date – The credential will auto-renew the day after the expiration date for all users who have completed the requirements assigned to this credential before 12 a.m. on the expiration date.

NOTE: If a user does not complete the requirements prior to 12 a.m. on the date the credential expires the auto-renew feature will not work and a platform manager will need to manually adjust the credential expiration date.

The new expiration date must be for the day you are manually entering the date or later in order for auto-renew to recognize the requirements as being met and to trigger the auto-renew feature. The credential would then become available the day after the new expiration date is updated in the system.

7. Click **Create** to complete the task.

How to Create a New Credential – Adding Alerts



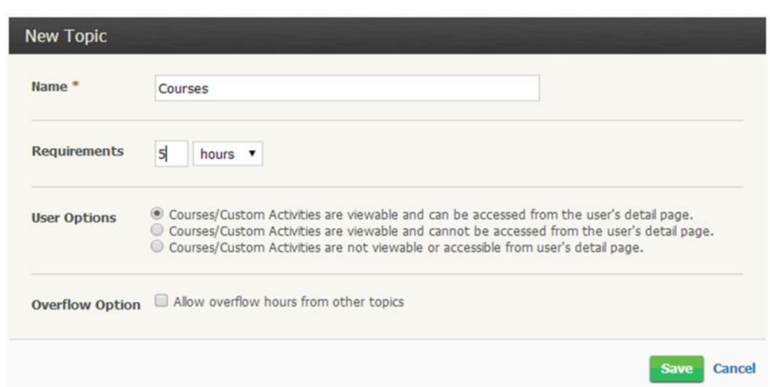
Alerts (5) — Add Alert

MESSAGE	WHEN	WHO	INDIVIDUAL	DELIVERY
New Hire Orientation has been create for your new employee.	59 days before expiration	Administrator Supervisor User		Email Notifications
You have been assigned a New Hire Orientation Credential.	59 days before expiration	Administrator Supervisor		Email Notifications
Your New Hire Orientation Credential expires in 30 days.	30 days before expiration	User		Email Notifications
Congratulations! You have completed your New Hire Orientation Credential.	Requirements are completed	Administrator Supervisor User		Email Notifications
Your New Hire Credential has expired. Please contact your manager to discuss next steps.	1 days after expiration	Administrator Supervisor User	Big Bird	Email Notifications

1. Click on **Add Alert**.
2. Enter **Alert Message** text in the box. *Required
3. Determine **When to Alert**.
   - **On Expiration Date**
   - **# Days Before Expiration Date**
   - **# Days After Expiration Date**
   - **Requirements are Complete**
4. Determine **Who Should Receive the Alert**.
   - **Administrator** – Will go out to ***all*** site Admins.
   - **Supervisor** – Will go out to all site Supervisors linked to Users in Credential through Groups they oversee.
   - **User** – Will go out to Users in the Credential.
   - **Add Individual** – Will go to the individual you have chosen regardless of who is in the Credential.
5. Determine how to Send the Alert.
   - **Email –** To email address attached to Users account.
   - **Notifications –** To the Notifications feature 0 0 (all Alerts will go to Notifications by default).
6. Click **Save**.

TIME SAVING TIP: Type and save generic alerts in a Word document so you can copy and paste into the Alert Message box and then edit.

How to Create a New Credential – Adding Topics



1. Click **Add Topic**.
2. Enter **Name**. *Required
3. Determine number of **Requirements** – Remember if you do not include any requirements, then the credential will always show as 100% complete.
4. Choose **User Option**.
   - **Course/Custom Activities are viewable and can be accessed from the user's detail page –** This creates links to each course or activity from inside the credential on the user's home page.

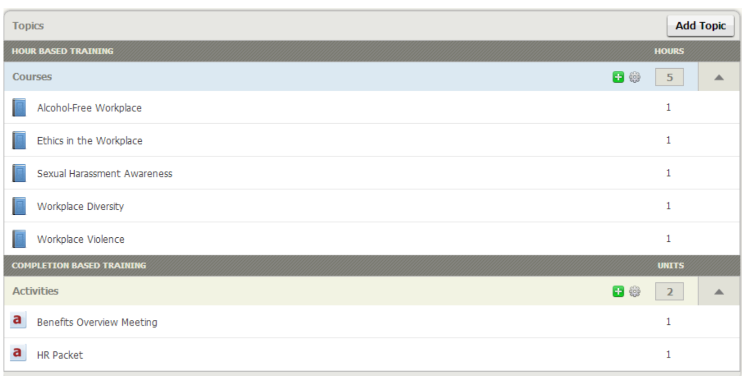
- **Courses/Custom Activities are viewable and cannot be accessed from the user's detail page –** Courses and activities are listed for the user. The Administrator is in charge of assigning the training using create new assignments application.
- **Courses/Custom Activities are not viewable or accessible from user's detail page –** The list of training is not viewable to the user.

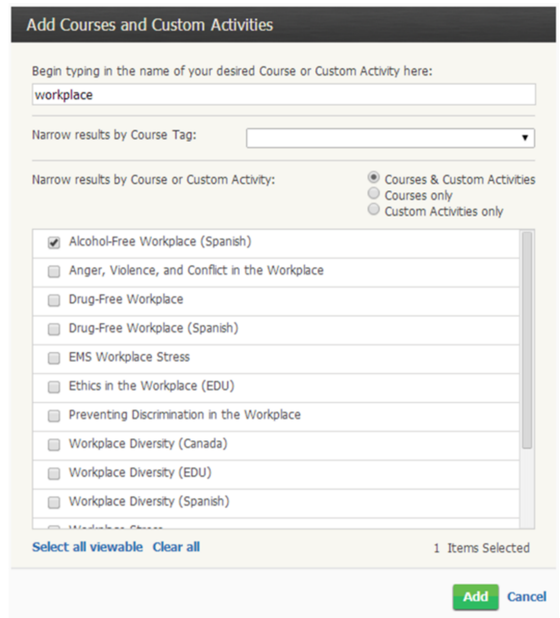
5. Determine the need to **Allow overflow hours from other topics**. Check box to allow overflow hours from other topics in the same credential. This allows users to count additional training from a different topic after they have met the required number of hours.

How to Create a New Credential – Adding Requirements

1. Click located on the Topic bar.

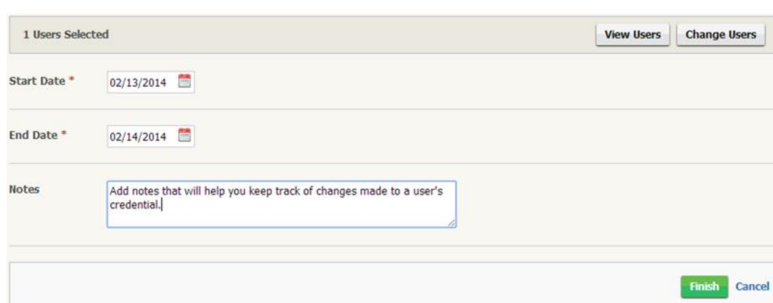
2. Search name of desired Course or Custom Activity by typing name in the search field or by scrolling down the alphabetical list.
   - Narrow results by Course Tag and/or Course or Custom Activity.
3. Check the box or boxes for the Courses and/or Activities you want to Add.
4. Click **Add**.





How to Create a New Credential – Adding Users

1. Click on in the Users box.
2. Use the **Standard User Select** screen to choose the Users to add to the Credential.
3. Select the **Start Date**.
4. Select the **End Date**.
5. Add **Notes** if necessary.
6. Click **Finish**.



Click **View Users** to see Users currently in the Credential.

Click **Change Users** to go back to the **Standard User Select** screen and choose new Users for the Credential.