

PowerDMS®

Using Certificates to Automate Training

Presenter: Amanda Bradford
trainingteam@powerdms.com





Amanda Bradford

**Training Specialist II &
Certified Professional Program Coordinator**



A few things to note:

- This session is being recorded.
- The recording will be automatically e-mailed to all registrants of this session as soon as it becomes available.
- **You can and should** download a copy of this presentation from that Handouts section of the GoToWebinar sidebar.
- You can type in your questions at any time within the questions field GoToWebinar interface.




What's the Best Practice?

Leveraging a certificate record with every course developed within PowerDMS.

- Certificates are used to track a training record, does not mean that is how you must assign your users to complete the training, although it requires less interaction if you do.

Why a certificate record?

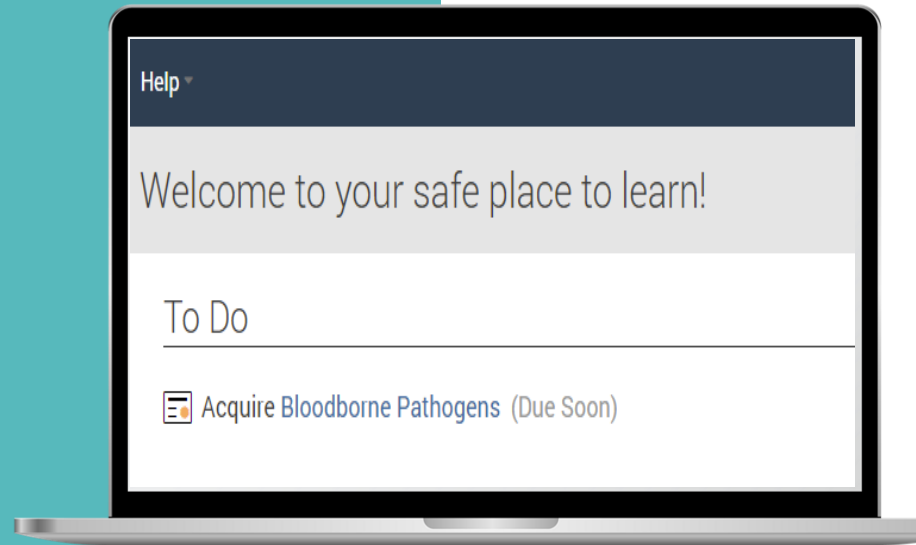
Certificates make it easy to:

- Assign training to learners when you don't need to specify/manage their enrollment.
 - Automate reminders for training renewals because they hold custom alert rules.
 - Provides a consistent place to confirm completion of training.
- 

Learners Perspective

Certificate will display on the learners To Do list

Automatically displays when the alert rule applies to the certificate record based on the expiration of the training.

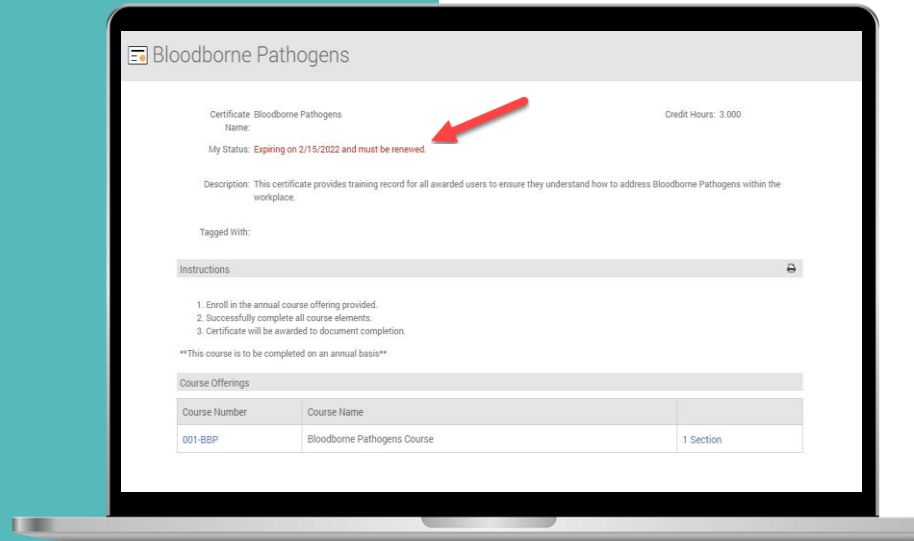


Learners Perspective

Upon selecting the certificate name from the To Do list, the user will be provided with the certificate information and the indication of the users STATUS at the top.



At the bottom, select the available section of the course to enroll and complete the training.



Manual Awarding

Assuming certificate record contains a property...

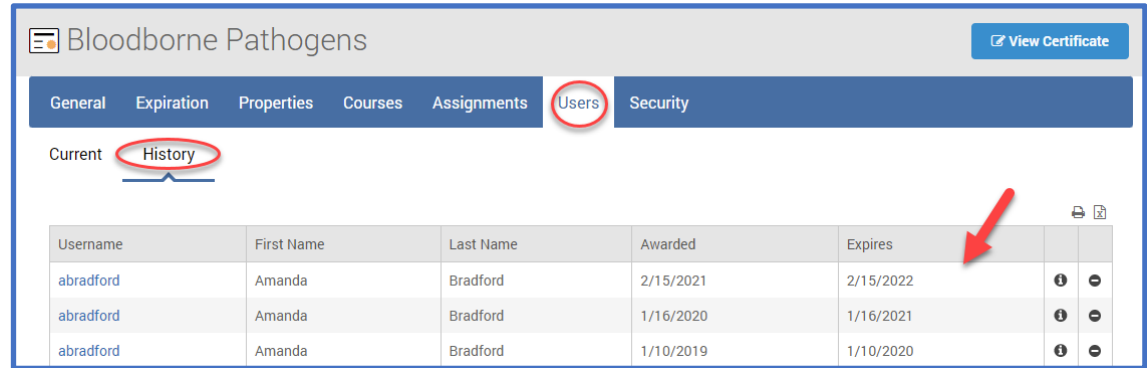
1. Navigate to the seats of the open course section.
2. Select the radio box next to the user(s) who have successfully completed the course elements.
3. Select Award (specific certificate name)
4. Respond OK to the popup prompt to save the selection.
5. Enter the property data needed and hit save.

The screenshot displays a software interface for managing course seats and certificates. The main window has tabs for 'General', 'Content', 'Fees', 'Seats', and 'Security'. The 'Seats' tab is active, showing a table with columns for 'Action', 'Last Name', and 'First Name'. A dropdown menu is open for the 'Action' column, listing various actions: 'Activate (Assign Course Content)', 'Auto Grade', 'Mark as Passed', 'Mark as Passed and Award All Certificates', 'Mark as Failed', 'Send a Message', 'Award All Certificates', and 'Award 'Code of Conduct Training''. The 'Award 'Code of Conduct Training'' option is selected. A 'User Certificate' popup is also visible, showing details for a certificate named 'Code of Conduct Training' awarded to 'abradford' on 10/2/2021. The popup includes fields for 'Awarded Date', 'Expiration Date', 'Date of Oral Exam', and 'Certificate Image'. A 'Save' button is at the bottom of the popup.

Administrators Perspective

Administrators can use the Users tab on the certificate, then evaluate the History tab to see when each learner has previously completed the training.

Note: Headers of the table can be leveraged as filters for isolating data points.



The screenshot displays the 'Bloodborne Pathogens' certificate interface. The 'Users' tab is selected and circled in red. Below it, the 'History' sub-tab is also circled in red. A table lists the training history for the user 'abradford'. The table has columns for Username, First Name, Last Name, Awarded, and Expires. A red arrow points to the 'Expires' column header, indicating it can be used as a filter. To the right of the table, there are icons for 'View Certificate' and a 'Print' icon.

Username	First Name	Last Name	Awarded	Expires		
abradford	Amanda	Bradford	2/15/2021	2/15/2022	i	⊖
abradford	Amanda	Bradford	1/16/2020	1/16/2021	i	⊖
abradford	Amanda	Bradford	1/10/2019	1/10/2020	i	⊖

Learners Perspective

Learners can use their Inbox to evaluate trainings completed by selecting the content (certificates) in reference, then using the History tab to see when they've previously completed the training.

Note: Selecting the printer icon allows them to print their certificate record themselves!

The screenshot displays the 'Inbox' interface. On the left sidebar, 'Certificates (1)' is highlighted. The main area shows a tabbed interface with 'Certificates (1)' selected. Below the tabs, the 'History' tab is active, showing a table of training records. A red arrow points to the printer icon in the first row of the table.

	Certificate	Description	Type	Credit Hours	Award Date	Expire Date
	Bloodborne Pathogens	This certificate provides training record for all awarded users to ensure they understand how to address Bloodborne Pathogens within the workplace.	OSHA	3.000	2/15/2021 9:59 AM	2/15/2022 9:59 AM
	Bloodborne Pathogens	This certificate provides training record for all awarded users to ensure they understand how to address Bloodborne Pathogens within the workplace.	OSHA	3.000	1/16/2020 12:00 AM	1/16/2021 12:00 AM
	Bloodborne Pathogens	This certificate provides training record for all awarded users to ensure they understand how to address Bloodborne Pathogens within the workplace.	OSHA	3.000	1/10/2019 12:00 AM	1/10/2020 12:00 AM

QUESTIONS?

A person wearing a dark blue suit and a light blue shirt is holding a rectangular white sign with both hands. The sign has the word "QUESTIONS?" written on it in a bold, dark blue, sans-serif font. The person's hands are visible, holding the sign from the bottom corners. The background is a plain, light grey.

Support Resources

PowerDMS Support Team: 1-888-959-5158 or support@powerdms.com

PowerDMS University Courses:

Self-Paced:

- Creating Certificates
- Managing Advanced Courses

Boot Camp (Retiring 1/31/2022):

- PowerDMS Training (Tests, Surveys, Certificates, Courses)

University Live:

- Training – Certificates
- Training - Courses

Success Community Resources:

[All Things Certificates](#)

