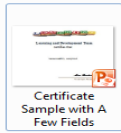
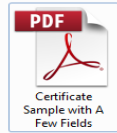


## Design Certificate Template

Create certificate template using any design software (e.g. PowerPoint) leaving space for dynamic fields (e.g. Course Name, Learner Name), then save as a PDF document.



1



2

## Update PDF with NTS Fields

Use Adobe Pro to detect and edit fields. Insert "Text Fields" in each area that will include an NTS Field. Edit the text field for font, size, position and name. Replace the default name with the NTS References (see Certificate section). Save PDF (with NTS fields) to Repository.

## Certification Pools, Type, Review

- Certification Manager>Certification Pool, Certification Type, Certifications Review
- Pools: organizing tool to group similar certifications (Example: Leadership, CPR, etc.)
- Type: reason for the certification. NTS has defaults, but others can be added.
- Review: view/delete/print awarded

## Certification Details Section

- Certification Manager>Certifications
  - Dashboard displays existing certifications as well as filters to search
  - Click **Create Certification**
- Certification Details**
- **Code and Name** fields are mandatory
  - Select **Pool, Type and Language**
  - **Status:** must be Open to be awarded
  - **Issued by & Description:** visible to learner
  - **Award Method:** Immediate or Designated Date
  - **Award Message:** email sent when awarded (created in Email Template Editor)
  - **Exam:** if exam required(created in Exam Manager).

## Certificate Section

- Click **...** to select PDF certificate template in Repository.  
Note: The *Reference* link displays the available fields for PDF certificates.
- Check if the user is allowed to print the certificate from NTS.
- If Award message selected in the Certification Details Section, check if the certificate should be attached to the message and identify which of the email recipients should receive attachment.  
**NOTE:** Will need to create Certificate first, then return to update this.

## Expiration/Renewal Policy Section

- If applicable, choose expiration either by the number of days/years or a fixed date.
- Configure Grace Period as needed
- Enter # of days before expiry for a reminder message
- If applicable, select the reminder message - default or create new in Email Template Editor
- Upon expiry, select module for re-enrollment & if needed, identify specific learners from those who expired
- **FINAL STEP:** Click **Create Certification**

## Assign to Module

- Locate specific learning object.
- Module Properties>Assign exam/certification/evaluation step.
- Click **...** to select the certification.
- Click Save icon from toolbar.