
HOW CERTIFICATES OF COMPLETION WORK

The SuccessFactors LMS has four files that can generate certificates of completion:

1. [User side](#) - user prints certificate for successful completion of internal items:
 - Go to **Learning History / Completed Work** > recorded learning event and hover over the title, then select **Print Completion Certificate** button
 - Uses CertificateOfCompletionLearningHistoryUser.rptdesign
 - Only one published version can exist – application is coded to use report ID 191
 - View-only on admin side **Reports** menu; cannot run this report from admin side
2. [Admin side](#) – admin prints or e-mails certificate at end of learning event recorder:
 - Go to **User Management > Tools > Learning Event Recorder** and record item or scheduled offering completion for one or more users
 - Select **Print** to generate PDF file with certificates for all successful completions; select **Email** to send notification to each user with PDF of certificate attached
 - Uses CertificateOfCompletionLearningEvent.rptdesign
 - Only one published version can exist – system is coded to use report ID 188
 - Admin cannot run this report from the **Reports** menu
3. [Admin side](#) – admin runs certificate report based on specific scheduled offering(s):
 - Admin runs report from **Reports** menu; can limit certificates to recorded event only or can run certificate for users registered in a scheduled offering, but before item is in user's learning history
 - Default report uses CertificateOfCompletionBySchedOffering.rptdesign; customer can support multiple published versions
4. [Admin side](#) – admin runs certificate report based on specific item(s):
 - Admin runs report from **Reports** menu; can limit certificates to recorded event only or can run certificate for an item not in user's learning history
 - Default report uses CertificateOfCompletionByitem.rptdesign; customer can support multiple published versions

IMPORT AND TEST THE USER-SIDE SIDE CERTIFICATE

The user side certificate is called Certificate of Completion Learning Event (User).

Steps to Import and Publish the New Report File

1. Log in to the admin side as an admin who has workflows for Edit Custom Reports, Import/Export reports, and Publish/Unpublish reports.
2. Go to the **Reports** menu and search for user reports with “certificate” as a keyword in the **Search** field, selecting **Publication Status** as *Published* and **Application** as *User*.

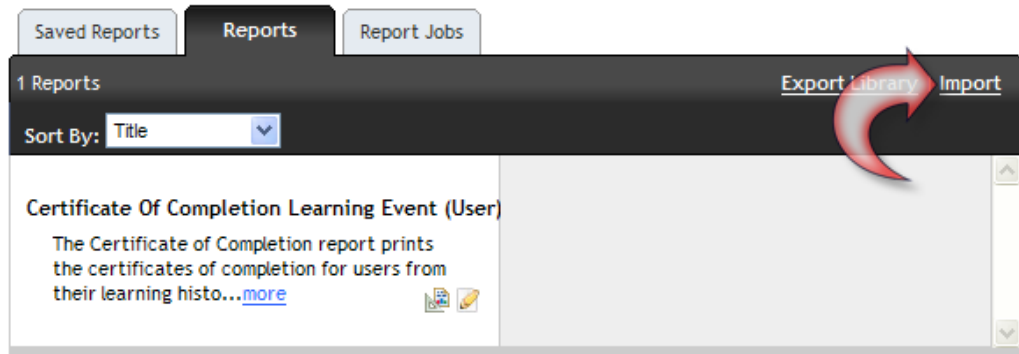
You will see the Certificate of Completion Learning Event (User) report.

The screenshot displays the 'Reports' management interface. On the left, a search sidebar is visible with the following filters:

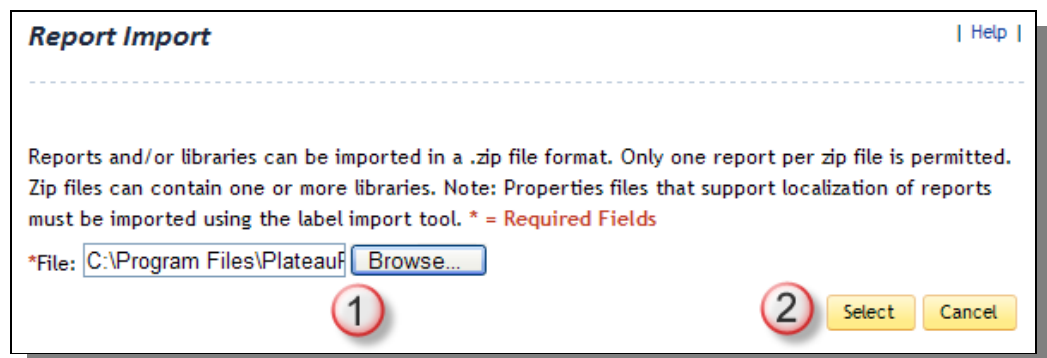
- Search:** 'certificate' (highlighted in yellow)
- Browse By:**
 - Category (Admin only):** User Management, Performance, Learning, Content, System Admin, Miscellaneous (all unchecked)
 - Publication Status:** Published (selected with a radio button and highlighted in yellow), Unpublished
 - Application:** Admin, User (selected with a radio button and highlighted in yellow)
- Submit** button

On the right, the 'Reports' tab is active, showing a search result for 'Certificate Of Completion Learning Event (User)'. The result includes a description: 'The Certificate of Completion report prints the certificates of completion for users from their learning histo...' and a 'more' link. There are also icons for print and refresh.

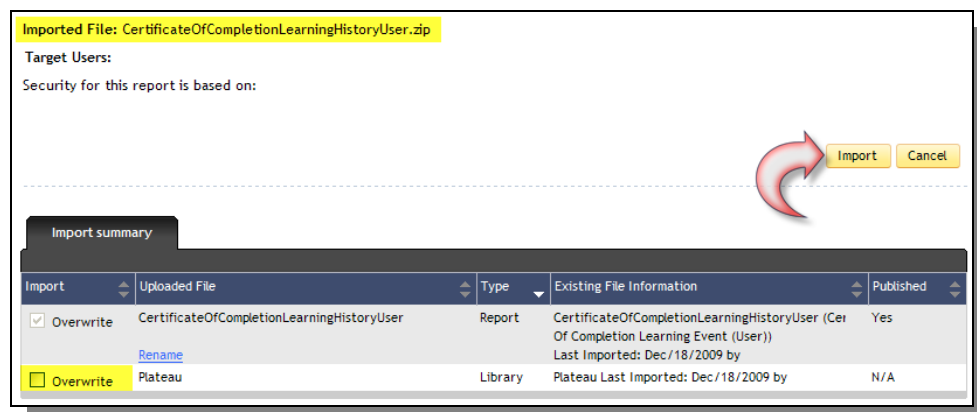
3. Select the **Import** link at the top right of the **Reports** menu.



4. Select **Browse** and navigate to the directory where you placed the zipped file **CertificateOfCompletionLearningHistoryUser.zip** – this file contains CertificateOfCompletionLearningHistoryUser.rptdesign file from Report Designer and Plateau.rptlibrary file. Click **Select** when finished.



5. You will see a confirmation screen that shows the file name and the default entry to **overwrite** the existing file – this is what you want to do.





Caution: Do NOT select the **Overwrite** option for the report library.

6. Select **Import** and system will proceed to a screen where you can save this new file and replace the original file.
The screen confirms that you want to save the new file – notice that the file will not be published (available for users) yet.
Select **Save**, then click **Close** after you see the *Saving Success* message.

Certificate Of Completion Learning Event (User)
Last Imported: Dec/18/2009 by Lane Davis-Coury

* = Required Fields

Description:

The Certificate of Completion report prints the certificates of completion for users from their learning history.

*Domain: PUBLIC

Published: No


File under Report Group

ID:

Name:

Comments:

Save Close

7. You will be returned to the **Browse** report menu – this time, you should select the **Publication Status** as *Unpublished* so that you can find the new version of the certificate – the next step is to activate the new certificate of completion.
8. Select the **Edit** () icon to edit the properties of report that you just saved.

9. Check the box for **Published**, then select **Save** and **Close** when finished.



Design Tip: The Plateau software is designed to run the same certificate report for ALL certificates generated on the user side. A customer cannot implement multiple, published versions of this certificate report.

Steps to Test the Certificate of Completion on the User Side

1. Record history for successful completion of an internal event if users do not have items in their learning history.
2. Go to the user side and navigate to **Learning > Learning History** (or to **Home page > Easy Links > Completed Work** for version 6.1).
3. Locate an item and hover over the title, then select the **Print Certificate of Completion** button.
4. Confirm that the certificate generates and displays output as intended.