

## Multi Certificate Setup

Now when using certificates within Studio Webcasting, Virtual Events or Video Portals, event owners have the option of setting up multiple certificates for a single course. Viewers can then choose their role to receive the proper certificate.

### Virtual Events - VX

#### Roles

The roles are setup at the tenant level within Virtual Events under Types on the main listing page.

Intrado **Virtual Events**

- EVENTS
- CREATE NEW EVENT
- PASSWORD POLICY
- TYPES
- CERTIFICATE ROLES**
- ADMINISTRATORS
- USER-DEFINED FIELDS
- EVENT CLASSIFICATION
- CHANGE LOG ACTIVITY
- API ACCESS DISPLAY
- WEBCAST RECORDINGS
- MANAGE AMPLIFY
- PLATFORM BUILDER
- CMS

### Roles

List of certificate roles. Create new roles here to use when creating certificate templates in courses. [Learn more >](#)

Role	Use Count	Actions
<input type="text" value="Doctor"/>	1	<a href="#">Delete</a>
<input type="text" value="Nurse"/>	1	<a href="#">Delete</a>
<input type="text" value="Physician"/>	1	<a href="#">Delete</a>
<input type="text" value="Physician Assistant"/>	1	<a href="#">Delete</a>
<input type="text" value="Surgeon"/>	1	<a href="#">Delete</a>
<a href="#">Add a role</a>		

## Setting Up Multiple Certificates

VX > Content Structure > Presentation Setup > Certificate Settings

1. Check "Send Certificate"
2. Enter a Completion Message
3. Enter an Email Subject
4. Click "Add Certificate" and open the Certificate Browser
5. Create, Copy or Edit a certificate.
6. Make sure to clearly title your certificate (New feature with the 14.6 release)
7. Under Roles click "Role assigned"
8. Select which Roles will receive the certificate (Note: While multiple roles can be assigned to a certificate, a role cannot be assigned to multiple certificates.)

**Certificate Settings**

Send Certificate

**Completion Message**

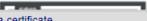
Congratulations! You have met all of the requirements to complete certification.

This message will display on the presentation console when a user completes the defined requirements. It will also appear as the message body of the email sent to the user's in-event mailbox. [Learn more >](#)

**Email Subject**

Congrats!

This is the subject line of the in-event message that a user will receive upon completion of the defined requirements. The user's certificate PDF will be attached to this message and the message body will be the "Completion Message" defined above.

Certificate	Certificate Name	Roles	Remove
 Certificate Browser	Certificate for Doctor	<b>ASSIGNED ROLES</b> Roles assigned: 1 <input checked="" type="checkbox"/> Doctor <input type="checkbox"/> Nurse <input type="checkbox"/> Physician <input type="checkbox"/> Physician Assistant <input type="checkbox"/> Surgeon	Remove
	Certificate for Nurse	Roles assigned: 1	Remove

[Add a certificate](#)

DELETE CREATE COPY EDIT SELECT

5

1

2

2

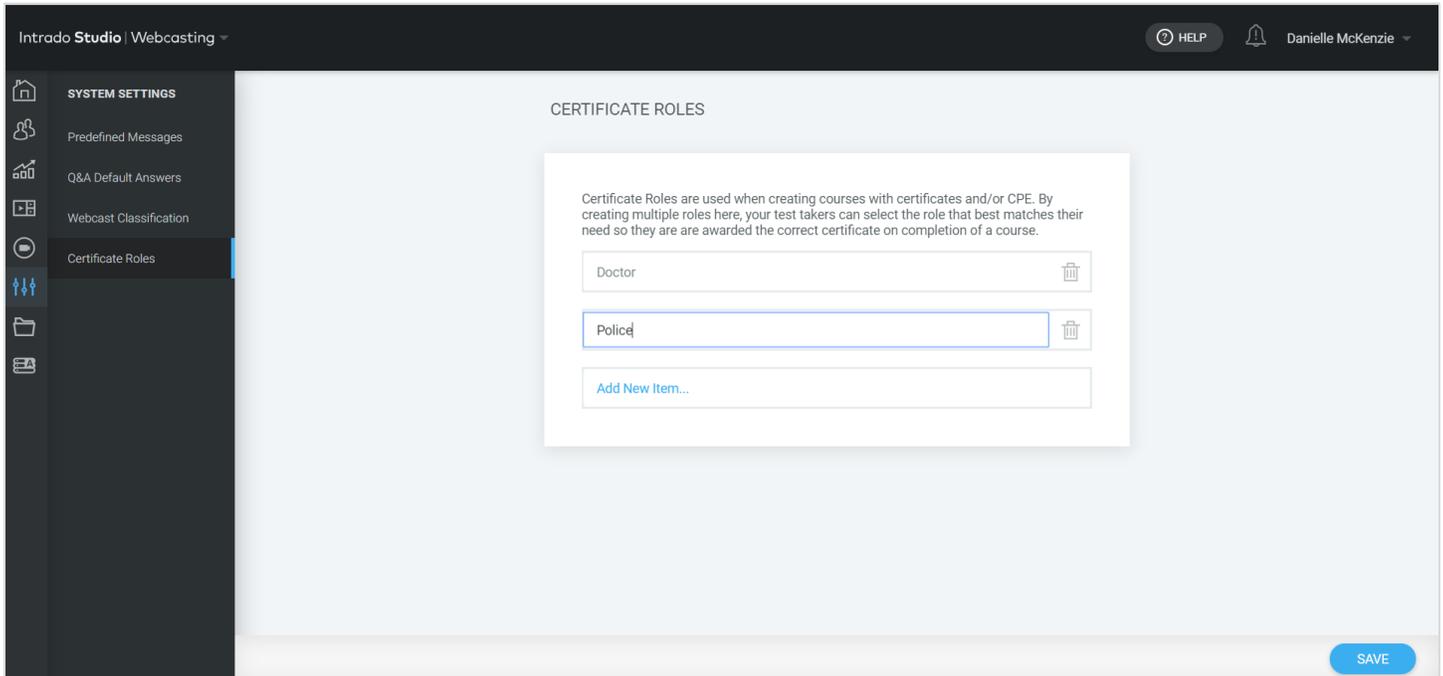
My Test Certificate 1

My Test Certificate 2

## Studio Webcasting

### Certificate Roles

The roles are setup at the tenant level within Studio Webcasting under System Settings > Certificate Roles on the main listing page. These roles are global to the tenant and will be displayed when configuring a certificate within all webcasts in the tenant.



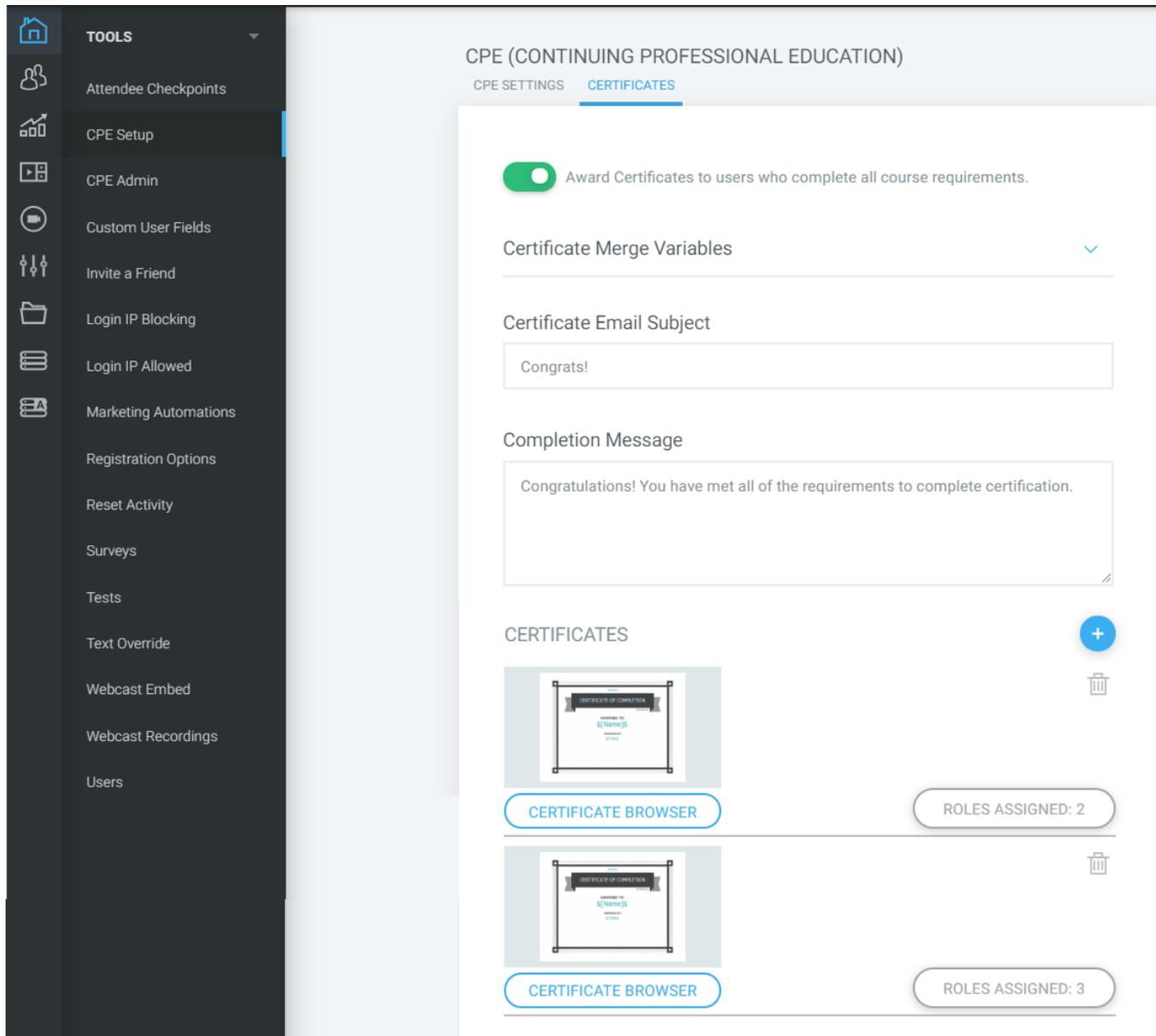
The screenshot displays the 'Certificate Roles' configuration page in the Studio Webcasting interface. The page title is 'CERTIFICATE ROLES'. A central white box contains the following text: 'Certificate Roles are used when creating courses with certificates and/or CPE. By creating multiple roles here, your test takers can select the role that best matches their need so they are awarded the correct certificate on completion of a course.' Below this text are three input fields: 'Doctor', 'Police', and 'Add New Item...'. Each field has a trash icon to its right. The 'Police' field is currently selected. The interface includes a dark sidebar on the left with 'SYSTEM SETTINGS' and 'Certificate Roles' highlighted. The top right shows 'HELP', a notification bell, and the user name 'Danielle McKenzie'. A blue 'SAVE' button is located at the bottom right of the main content area.

## Setting Up Multiple Certificates

Studio Webcasting > Tools > CPE Setup > Certificates

1. Check "Award Certificates to users who complete all course requirements"
2. Add values for the "Certificate Merge Variables" (if applicable)
3. Enter an Email Subject
4. Enter a Completion Message
5. Select the + sign to add a Certificate and open the Certificate Browser
6. Create, Copy or Edit a certificate.
7. Make sure to clearly title your certificate (New Feature)
8. Under Roles click "Role assigned"
9. Select which Roles will receive the certificate (Note: While multiple roles can be assigned to a certificate, a role cannot be assigned to multiple certificates.)
10. Select the + sign to create additional certificates and assign roles.

Note: The certificate email subject and completion message will be used across all certificates configured in the webcast.



The screenshot displays the 'CPE (CONTINUING PROFESSIONAL EDUCATION)' settings page, specifically the 'CERTIFICATES' tab. On the left is a dark sidebar with navigation icons and labels: TOOLS, Attendee Checkpoints, CPE Setup, CPE Admin, Custom User Fields, Invite a Friend, Login IP Blocking, Login IP Allowed, Marketing Automations, Registration Options, Reset Activity, Surveys, Tests, Text Override, Webcast Embed, Webcast Recordings, and Users. The main content area has a header 'CPE (CONTINUING PROFESSIONAL EDUCATION)' with sub-tabs 'CPE SETTINGS' and 'CERTIFICATES'. A green toggle switch is turned on for 'Award Certificates to users who complete all course requirements.'. Below are three form fields: 'Certificate Merge Variables' (empty), 'Certificate Email Subject' (containing 'Congrats!'), and 'Completion Message' (containing 'Congratulations! You have met all of the requirements to complete certification.'). The 'CERTIFICATES' section features a blue '+' button to add new certificates. Two existing certificates are listed, each with a certificate preview image, a 'CERTIFICATE BROWSER' button, and a 'ROLES ASSIGNED' count (2 and 3).

## Video Portals

### Certificate Roles

The roles are setup at the tenant level within Video Portals under Station > Tools > Certificate Roles. These roles are global to the tenant and will be displayed when configuring a certificate within all webcasts in the tenant.

The screenshot shows the 'Tools' section of the Video Portals interface. On the left is a dark sidebar with navigation options: STATION, NETWORKS, CHANNELS, PROGRAMS, USERS, REGISTRATION, METRICS, MESSAGING, and CMS. The main content area has tabs for GENERAL, ADMINISTRATORS, BRANDING, and TOOLS. Under the TOOLS tab, there is a grid of 13 tool cards, each with a wrench icon and a pencil icon. The 'Certificate Roles' card is highlighted with a red border. The other tool cards are: Set Time Zone, Mobile Browser Settings, Password Policy, Allowed IP Addresses, Manage Content Tags, Manage Recommendations, Video Syndication, Video Upload, Program Recordings, and Amplify.

Tool Name	Icon
Set Time Zone	Wrench and pencil
Mobile Browser Settings	Wrench and pencil
Password Policy	Wrench and pencil
Allowed IP Addresses	Wrench and pencil
Manage Content Tags	Wrench and pencil
Manage Recommendations	Wrench and pencil
Video Syndication	Wrench and pencil
Video Upload	Wrench and pencil
Program Recordings	Wrench and pencil
Amplify	Wrench and pencil
<b>Certificate Roles</b>	Wrench and pencil

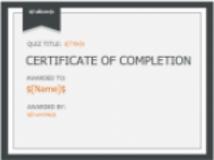
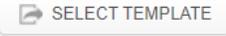
## Setting Up Multiple Certificates

Video Portals > Programs > Tools > Continuing Professional Education > Certificates

1. Check "Award Certificates to users who complete the course"
2. Enter an Email Subject
3. Enter a Completion Message
4. Select the + sign to add a certificate and open the certificate browser
5. Create, Copy or Edit a certificate.
6. Make sure to clearly title your certificate (New Feature with the 14.6 release)
7. Under Roles click "Role assigned"
8. Select which Roles will receive the certificate (Note: While multiple roles can be assigned to a certificate, a role cannot be assigned to multiple certificates.)
9. Select the + sign to create additional certificates and assign roles.

Note: The certificate email subject and completion message will be used across all certificates configured in the webcast.

CERTIFICATES +

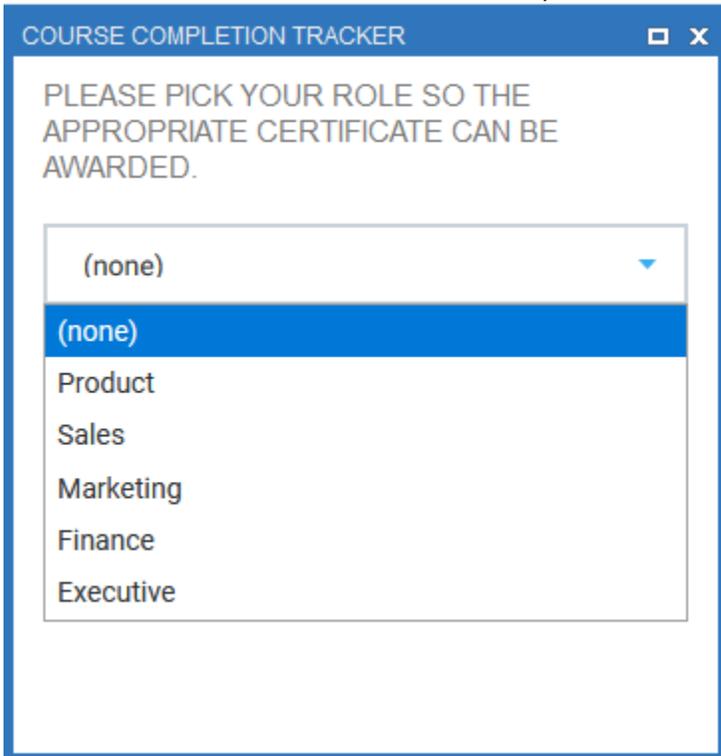
CERTIFICATES	NAME	CERTIFICATE ROLES	DELETE
	Sales Certificate	<div style="border: 1px solid black; padding: 5px;"><b>ASSIGNED ROLES</b><ul style="list-style-type: none"><li><input type="checkbox"/> Executive</li><li><input type="checkbox"/> IT</li><li><input type="checkbox"/> Marketing</li><li><input type="checkbox"/> Product Management</li><li><input checked="" type="checkbox"/> Sales</li></ul></div> <b>Roles assigned: 1</b>	
<p>Select or edit certificate template.</p> <p></p>		<b>Roles assigned: 2</b>	
<p>Select or edit certificate template.</p> <p></p>			

## Studio Attendee View

### Viewer Role Selection

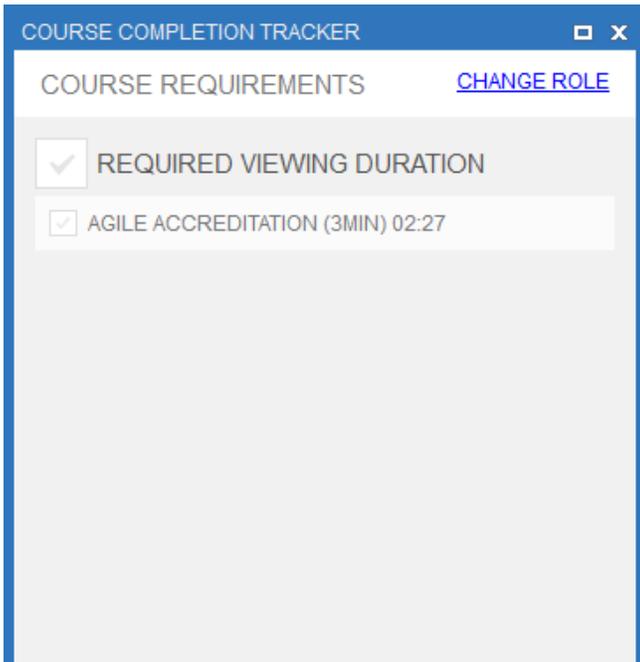
The “Course Completion Tracker” has been updated to allow viewers to select their Role which will send the viewer a certificate specific to their Role once they complete the course requirements. The role selection will only appear if the certificate has assigned roles to it.

Note: A viewer must select a Role before they can earn a certificate.



The screenshot shows a window titled "COURSE COMPLETION TRACKER" with a close button. The main text reads: "PLEASE PICK YOUR ROLE SO THE APPROPRIATE CERTIFICATE CAN BE AWARDED." Below this is a dropdown menu currently showing "(none)". The dropdown is open, displaying a list of roles: "(none)", "Product", "Sales", "Marketing", "Finance", and "Executive". The "(none)" option is highlighted in blue.

Once the viewer selects their role, they can change their role by selecting “Change Role”. This role can only be changed prior to the certificate being awarded.



The screenshot shows a window titled "COURSE COMPLETION TRACKER" with a close button. The main text reads: "COURSE REQUIREMENTS" followed by a blue link labeled "CHANGE ROLE". Below this are two checked checkboxes: "REQUIRED VIEWING DURATION" and "AGILE ACCREDITATION (3MIN) 02:27".

## CPE Admin Tool

### Updating a Viewer's Role & Certificate

The CPE Admin Tool has been updated to allow an administrator to change a user's role and send the user a different certificate that correlates to their updated role. When regenerating a certificate for a viewer, you must select a Role for the viewer before you can deliver the new certificate.

CPE ADMIN

Select: [All](#) [Complete](#) [Incomplete](#) [None](#)    Completion Date Override:       **Certificate Role:** (none) ▼

SELECT	NAME	COMPANY	EMAIL	COMPLETED	AWARDED BY	DURATION <small>RV - Multi-cert Testing 2 MINUTES REQUIRED</small>
<input type="checkbox"/>	RV@INXPO.COM		RV@INXPO.COM	03/03/2020 3:02PM		00:03:24 ●
<input checked="" type="checkbox"/>	RWVAHEY@GMAIL.COM		RWVAHEY@GMAIL.COM	03/05/2020 3:54PM 		00:07:48 ●
<input checked="" type="checkbox"/>	Ryan AOL		VAHEY16@AOL.COM	03/04/2020 5:43PM		00:05:38 ●
<input type="checkbox"/>	RYAN.VAHEY@INTRADO.COM		RYAN.VAHEY@INTRADO.COM	03/03/2020 2:33PM 	Ryan Vahey	00:03:25 ●

[REGENERATE CERTIFICATES](#)    [RECALCULATE COMPLETIONS](#)    [AWARD COMPLETIONS](#)