

# Certification Levels for Elements (6.3.1)

 For versions prior to 6.3.1, see [Certifying an Element \(prior versions\)](#)

Version 6.3.1 introduces a more granular method for certifying elements by creating various Levels of Certification.

This article covers:

1. [Certification without Levels](#)
2. [Default Certification Levels](#)
3. [Add a New Certification Level](#)
4. [Setting the Certification Level on Elements](#)
5. [Objects that Allow Setting Levels of Certification](#)
6. [Where Certification Levels are Displayed](#)
7. [Where Certification Levels are available for Filtering](#)

NOTE:

- Certification Levels only apply to Elements
- Datasets, User Maps, and Data Sources still use the older "Yes/No" settings: see [Certifying Objects Other Than Elements](#)

# 1. Certification without Levels (prior to 6.3.1)

The screenshot shows the configuration page for a metric named 'Daily Sales'. The interface includes a top navigation bar with 'Metrics / Daily Sales(dimensioned by Country)', a search bar, and a '+ New...' button. Below the navigation is a menu with options: Info, Data, Alerting, Charting, Associations, Documents, Advanced, Engagement, History, and a 'Preview' button. The main configuration area contains the following fields and options:

- Include Metric in next [scheduled migration](#)
- Measured:
- Dimension it by:  + ⚙️
- Collecting is:  enabled |  disabled
- Visible:  on Homepage  in Search
- Name:
- Description:  (2500 character maximum)
- Apply Markdown to description
- Category:  + ⚙️
- Certified:  Yes |  No by **Anna Kennedy** on 2021-10-13 23:13:01
- 

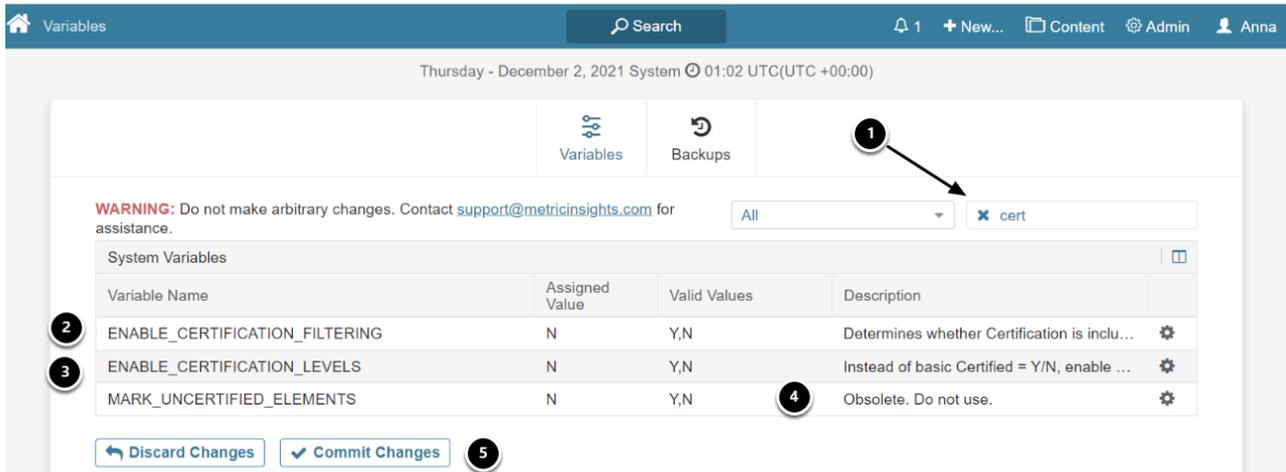
An arrow points to the 'Certified' status field.

The option to select Status of Certified (Yes) or Uncertified (No) has been supported since Release 5, but this function has been expanded in Release 6.3.1 to allow various Levels of Certification.

## 2. Activate Certification Levels (new in 6.3.1)

**i** Note that you can Add/Change the Certification Levels prior to Activation (Steps 3 & 4)

Admin -> System -> Variables

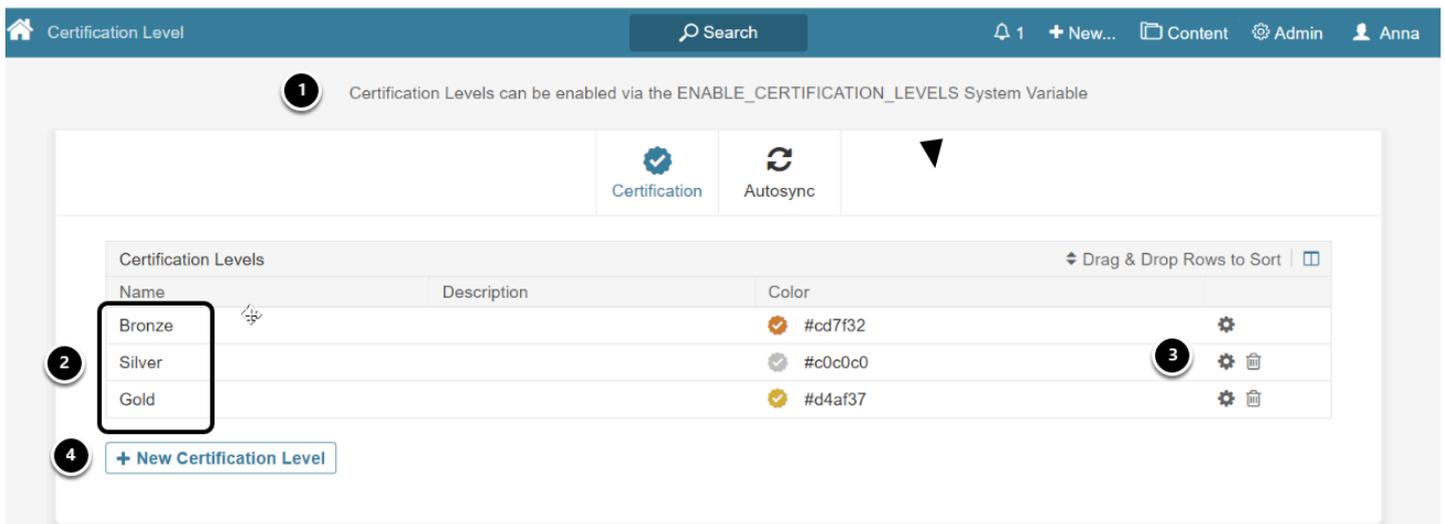


1. Enter "**cert**" in the Search field to limit choices
2. Set **ENABLE\_CERTIFICATION\_FILTERING** to "Y" to allow filtering on the Homepage by Certification Level
3. Set **ENABLE\_CERTIFICATION\_LEVELS** to "Y" to enable the Levels option
4. **MARK\_UNCERTIFIED\_ELEMENTS** is no longer supported
5. [Commit Changes] and your new Levels will be applied

**NOTE:** All elements that were previously set to Certify = "Y" will now be set to the Level designated as Default.

### 3. View Default Certification Levels

Admin menu > System > Certification Setup



Initially, your system will be set up with three Levels, but you can change any of these or add New Certification Levels.

1. Message showing how to enable Certification Levels if they are currently Disabled
2. Three Levels are installed with Release 6.3.1. **Bronze** is the lowest level and **Gold** is the highest
3. You can modify any of the existing Levels, or delete any Level except the one designated as Default.
4. Select **[+ New Certification Level]** to open the Add popup

## 4. Add a New Certification Level

The screenshot shows a dialog box titled "Add Certification Level" with a close button (X) in the top right corner. It contains four numbered steps:

- 1 Name**: A text input field containing "Development Certified".
- 2 Description**: A text area containing "This is the lowest level of Certification. It indicates that the data has been reviewed by the Programming Manager and is ready for use."
- 3 Color**: A color picker grid with a purple square selected. Below the grid is a text input field showing "#ff00ff" and a "Reset" button.
- 4 Is default?**: A toggle switch that is currently turned on.

At the bottom left, there is a "Save" button and the text "or cancel".

1. Input a **Name** that is meaningful to your organization
2. Optionally, add a **Description**
3. Pick a **Color** by clicking a square on the color chart
4. Indicate if this Level is the **Default**. There can only be one Default Level. When Certification Levels are activated, all "yes" certifications will be reset to this Level

[Save]

## 5. Setting the Certification Level on an Element Editor

Content > Elements > Edit any element > Info tab (our example is an External Report)

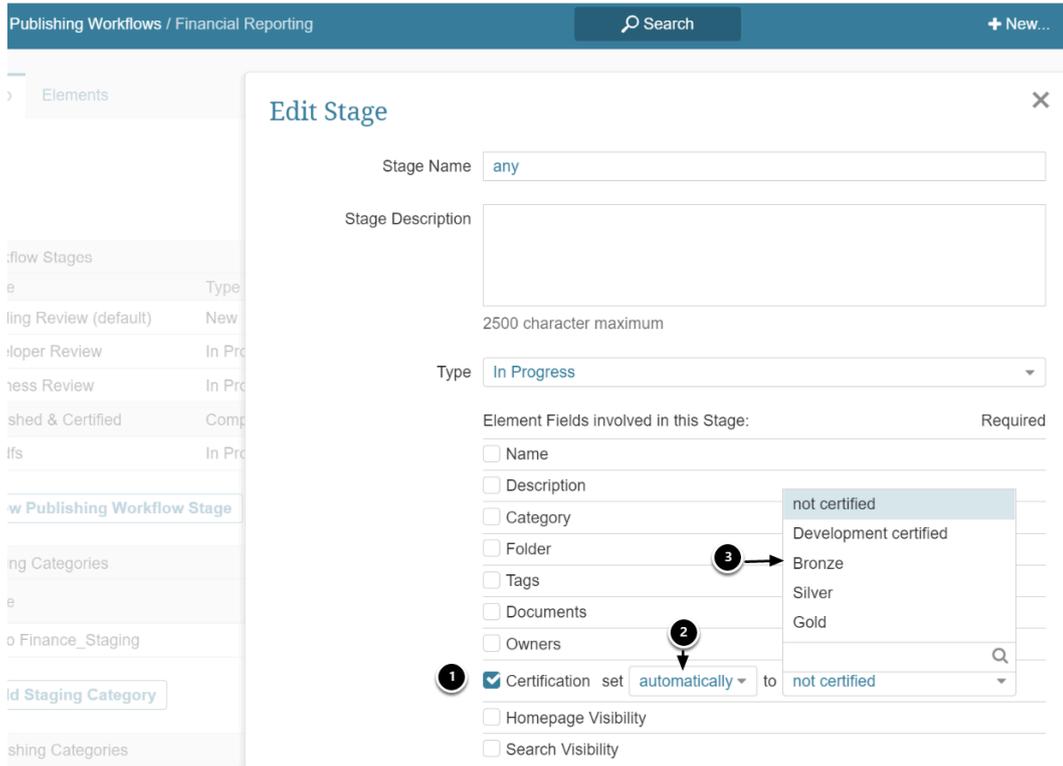
The screenshot shows the configuration page for an external report titled "Daily Profit by Country". The page has a navigation bar with "Info" selected. The configuration options include:

- Include External Report in next [scheduled migration](#)
- Name:
- Description:
- Apply Markdown to description (2500 character maximum)
- Collecting is:  enabled |  disabled
- Visible:  on Homepage |  in Search
- Dimensioned by:  + ⚙️
- Category:  + ⚙️
- 1 Certified:  Yes |  No  
Choose "no" to change status to "Uncertified"
- 2 Certification Levels: 
  - 3 Development Certified
  - Bronze
  - Silver
  - Gold

1. Set **Certified** to "Yes"
2. **Certification Levels** will display the Default Level
3. You can choose any Level using the drop-down

## 6. Objects that Allow Setting Levels of Certification

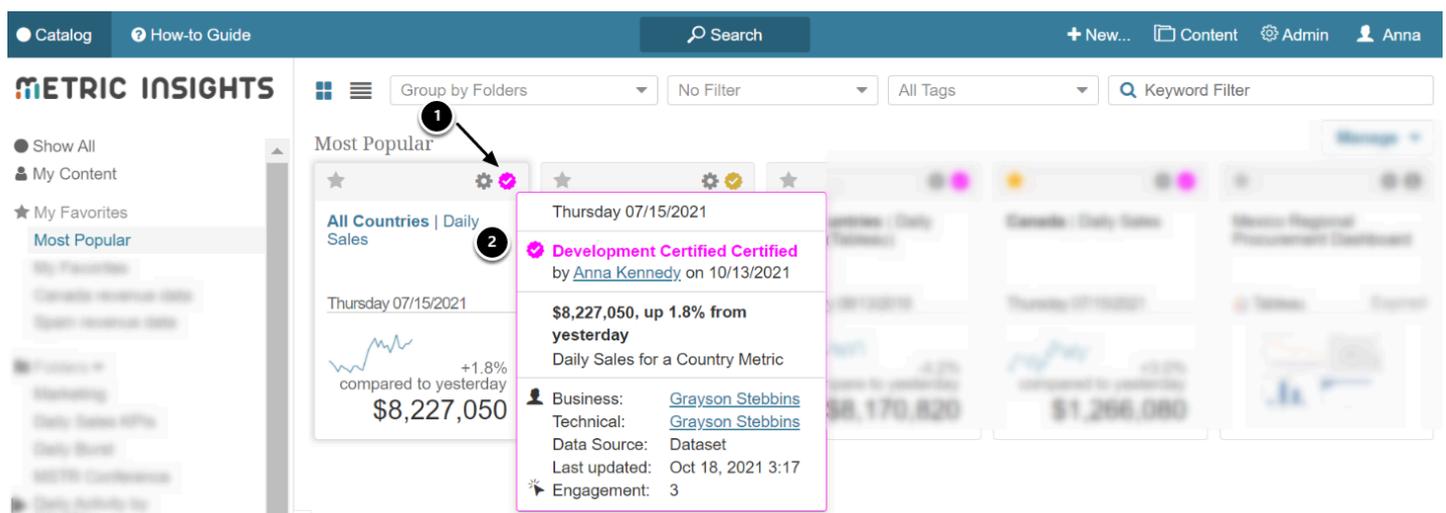
1. **Elements:** Certification is set on their Editors > **Info** tab as shown above
2. **Workflows:** Certification for elements can be set when editing any Stage



1. On any Stage Editor, check **Certification**
2. Choose either **Automatically** or **by User** from dropdown
3. Select either **not certified** or any existing **Certification Level**

## 7. Where the Certification Level is Displayed

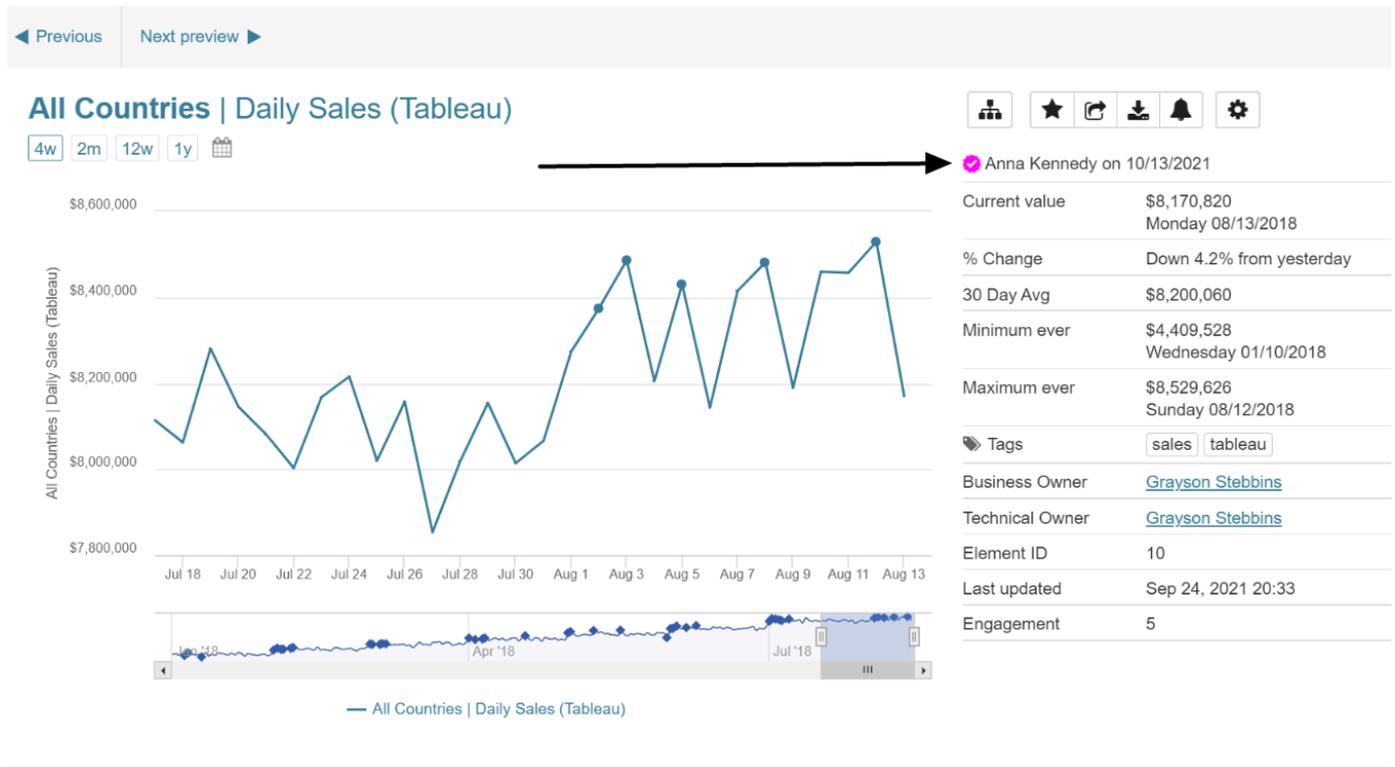
### 7.1. Homepage tiles



1. Tiles on the Homepage will display **Alert Levels** if assigned

2. Hover over the **Certified icon** to display the same information as is displayed by the Info icon on non-certified elements

## 7.2. Tile Previews



## 7.3. Element Viewers

Dashboards / ThoughtSpot Pinboard Search + New...

ThoughtSpot Pinboard Info Users

**Employment Overview**  
Created By: Postage User

12 pinboard insights

**Number of Employees**

2.09M

**Salary Dollars Outlay**

\$174.36B

**Employees, Avg Salary by Occupation Type**

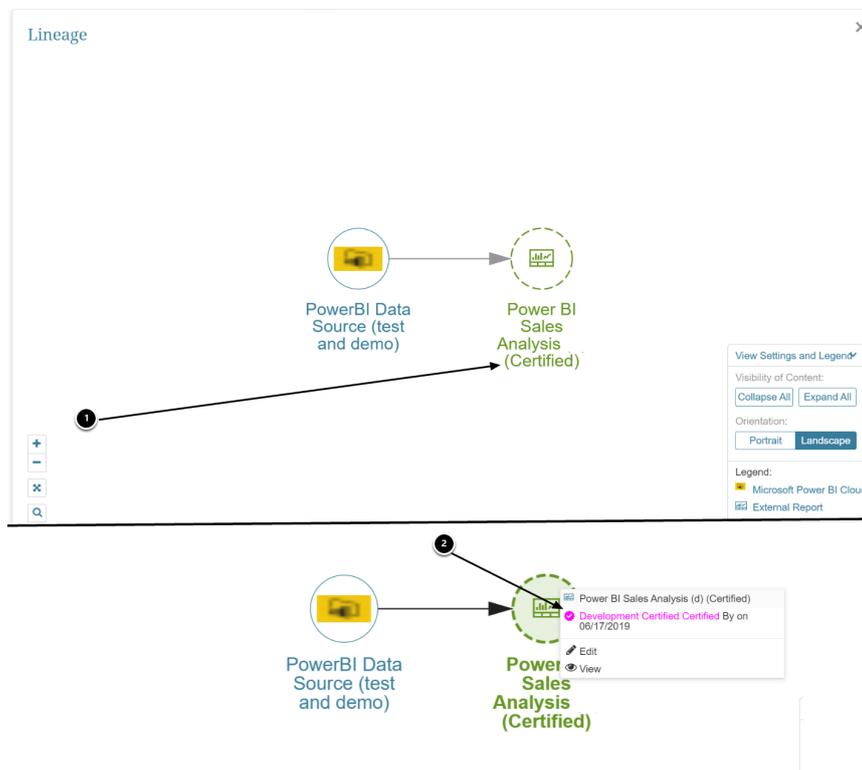
**Length of Service Range and Avg Salary by Occupation Type**

Length of Service Range	Unemployed	Less than 2 year	2 - 5 years	5 - 10 years	10 - 15 years	15 - 20 years	20 - 25 years	25 - 30 years	30 - 35 years	35 - 40 years	40 - 45 years	45 - 50 years
Unemployed	\$45,004											
Less than 2 year	\$42,004	\$60,706										
2 - 5 years	\$53,706	\$60,004	\$60,004									
5 - 10 years	\$63,004	\$72,004	\$72,004	\$72,004								
10 - 15 years	\$63,004	\$84,004	\$84,004	\$84,004	\$84,004							
15 - 20 years	\$63,004	\$96,004	\$96,004	\$96,004	\$96,004	\$96,004						
20 - 25 years	\$63,004	\$108,004	\$108,004	\$108,004	\$108,004	\$108,004	\$108,004					
25 - 30 years	\$63,004	\$120,004	\$120,004	\$120,004	\$120,004	\$120,004	\$120,004	\$120,004				
30 - 35 years	\$63,004	\$132,004	\$132,004	\$132,004	\$132,004	\$132,004	\$132,004	\$132,004	\$132,004			
35 - 40 years	\$63,004	\$144,004	\$144,004	\$144,004	\$144,004	\$144,004	\$144,004	\$144,004	\$144,004	\$144,004		
40 - 45 years	\$63,004	\$156,004	\$156,004	\$156,004	\$156,004	\$156,004	\$156,004	\$156,004	\$156,004	\$156,004	\$156,004	
45 - 50 years	\$63,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004	\$168,004

**Employees by General Schedule and Equivalent Grade**

[Add Expert Analysis](#)

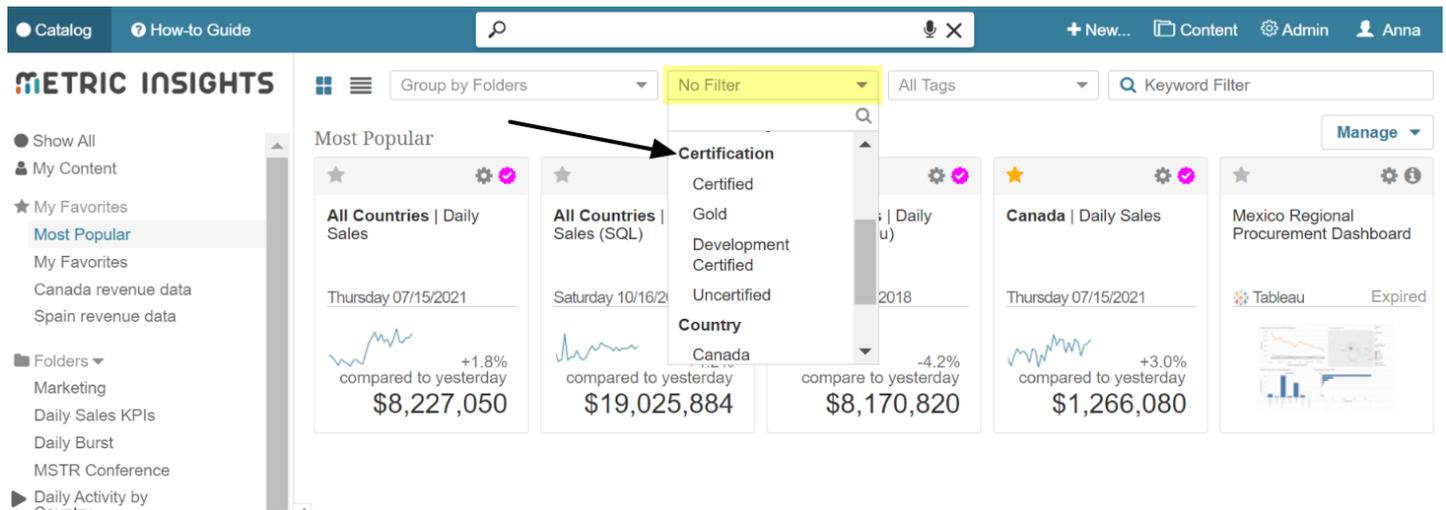
## 7.4. Lineage Diagrams



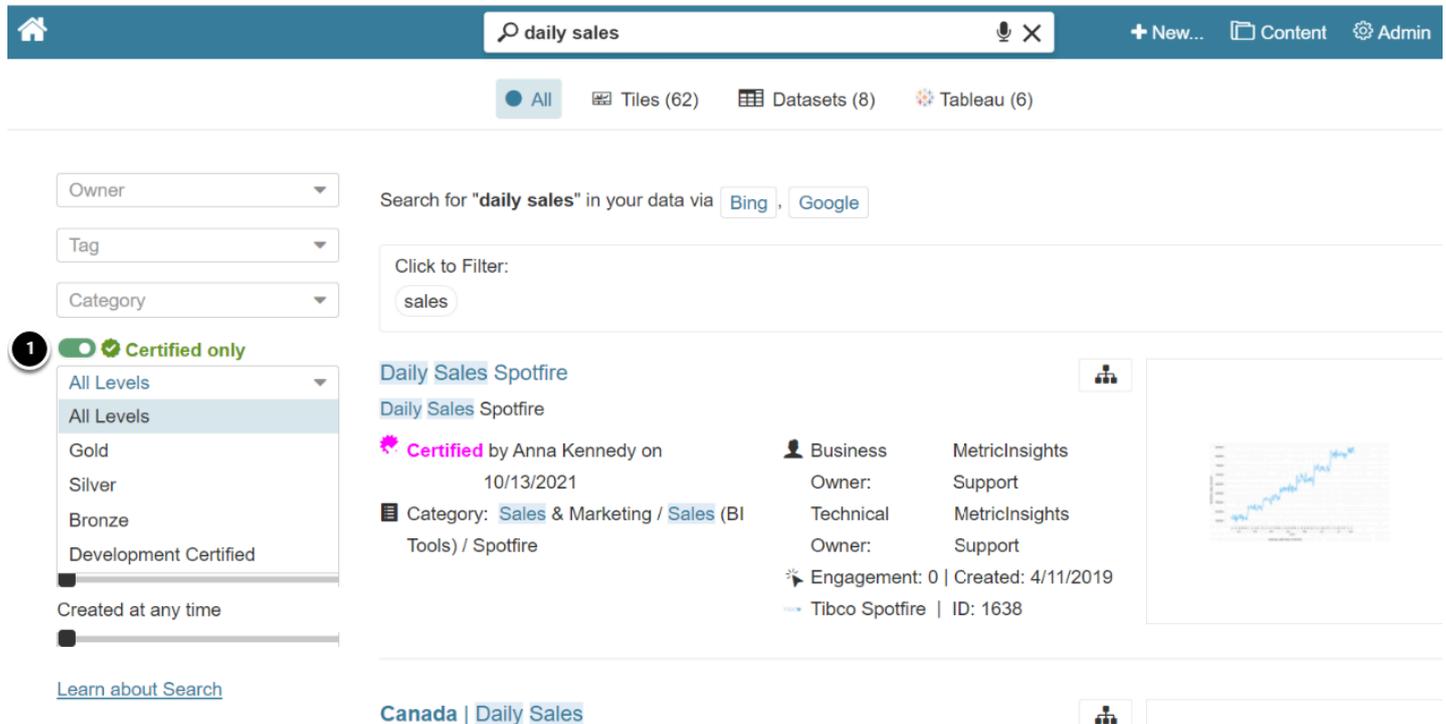
1. Note that the color of "Certified" does not indicate the Level of Certification
2. Clicking on the **element icon** will display more Certification information with correct coloring

## 8. Where Certification Levels are available for Filtering

### 8.1. Homepage Filter



### 8.2. Global Search



1. Activating the **Certified only** toggle will allow filtering by **All** or any one of the defined Levels

## 8.3. Elements List

Home Elements
+ New... Content Admin

Tag:

Category:

Dimension:

Data Collection Trigger:

Enabled:

Hidden?:   Error

Type:

External Report Type:

Data Source:

Certification Levels:

Created by:

Owner:  Clear All

Elements										● Disabled Element
<input type="checkbox"/>	Name	ID	Type	Fetch Method	Dimensioned by	Category	Enabled	Modified	Engagement	View
<input type="checkbox"/>	Regional Procurement ...	1495	External...	Plug-in	Country/Re...	Das...		2021-10-18 21:2...	30	<input type="checkbox"/> View
<input type="checkbox"/>	Daily Sales (SQL) (dim...	1200	Metric	SQL	Country	Demo Elements	Y	2021-10-18 21:2...	7	<input type="checkbox"/> View
<input type="checkbox"/>	New Sales Report	1940	External...	Plug-in		Uncategorized	Y	2021-10-18 20:3...	1	<input type="checkbox"/> View
<input type="checkbox"/>	Global Analytics Dashboard	1760	External...	Plug-in		Global Analytics	Y	2021-10-18 20:3...	0	<input type="checkbox"/> View