Certificate Management

Purpose:

This user guide explains how to create new certificates, find and edit existing certificates, and add certificates to a course.

A certificate demonstrates successful completion of a course and/or receipt of credits

Administrative Roles with Access:

- Course Certificate Manager

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Navigate to Certificate Management

Go to the **(a) Admin** menu. Click on the **(b) Content** tile and then the **(c) Certificates** tile.

ADMIN ⓐ

ⓑ
📖 Content
Add and manage content. ›

✸ Certificates ⓒ
Add or manage custom course certificates.

Search for Certificates

2

On the Certificates page, search for certificates by titles, keywords, or ID number using the **(a) search bar**. Select **(b) Include inactive** and/or **(c) Include all public certificates**. Use the **(d)** sort feature to view the results in order by relevance, newest, recently modified, or in alphabetical ascending or descending order.
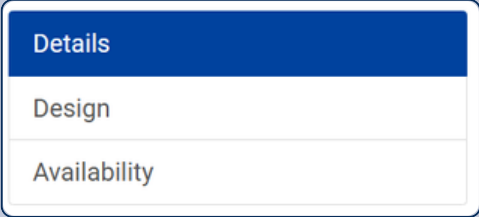
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ADMIN   SEARCH   USER SITE   HELP   🔍

‹ Back

Certificates   Add new certificate
         ⓑ   ⓒ
☐ Include inactive ☑ Include all public certificates
                                                         ⓐ
⊽ [Search certificates by keyword or ID]   🔍   ⓓ

2,950 record(s) found.   Recently modified ⌄

Title	Availability	Created	Updated	
SD Certificate of Completion	Public	Dec 13, 2021	Dec 12, 2025	⋮
P3N Administrator Training-Creating Users	Public	Aug 22, 2025	Aug 22, 2025	⋮
AB LW Test 8.7	Public	Aug 7, 2025	Aug 7, 2025	⋮
General CEU Certificate	Public	Jul 15, 2025	Jul 15, 2025	⋮

Recently modified ⌄
Relevance
A-Z
Z-A
Newest
Recently modified

TIP: If you search by keyword, the list will sort by relevance.

2025	Dec 17, 2025	⋮
Edit
Clone
View appointed courses
Delete

» Edit certificates by clicking on the blue certificate title or through the three-dot menu and selecting **Edit**.

» **Clone** certificates to make copies, select **View appointed courses** to see which courses receive the certificate, and **Delete** to remove certificate permanently.

3

Edit Certificates

Once a certificate is identified and selected, access the editing features through the Details, Design, and Availability menu. You can toggle between without saving progress.

» **Details**: make decisions about the visibility of the certificate here

» **Design**: View and alter the appearance and fields in the certificate

» **Availability**: View and alter the appearance and fields in the certificate

Details
Design
Availability

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Edit Certificates (continued)

3

Details

(a) The **Name** of the certificate may be edited here

(b) Select the **Active** checkbox to make the certificate available for use

(c) When a certificate is made **Private**, only individuals within the same group have access

(d) Adjust the **Print Margins** to suit the size of the certificate

>> Remember to click the green Save button.

Design

(a) The **Certificate image** is available as a small preview of the previously loaded certificate

(b) Select **Remove** to delete the previously attached certificate

(c) Click **Print preview** to download a PDF of the certificate

(d) Go into the **Designer** to create a more detailed certificate.

>> Remember to click the green Save button.

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3 Edit Certificates (continued)

Modify the attributes font, size, placement, and formatting in the Certificate Designer.

| CE End Date |
| CE Start Date |
| Completion Date |
| Conference Name |
| Course Level |
| Course Location |
| Course Name |
| Credit Earned |
| Custom Text |
| License Number #1 |
| License Number #2 |
| Professional License Type #1 |
| Professional License Type #2 |
| Provider Course Number |
| Provider Name |
| Session Date Range |
| Session End Date |
| Session Start Date |
| User Name |
| UserID |
| Custom Course Attributes |
| Custom User Attributes |

>> Use the **+ Add field** feature to incorporate dynamic attributes in the certificate.

>> Use the **Clear** feature to remove all attributes from the certificate.

>> Use the **Grid lines** toggle to add or remove the gridlines from the certificate designer.

Availability

Add or remove group access to the certificate by:

(a) Clicking the **x** to remove existing groups

(b) Typing in the search bar under **Add more groups**

>> Remember to click the green Save button.

4 Add New Certificate

From the Certificates page, the option to **Add new certificate** accesses the Details, Design, and Availability menu.

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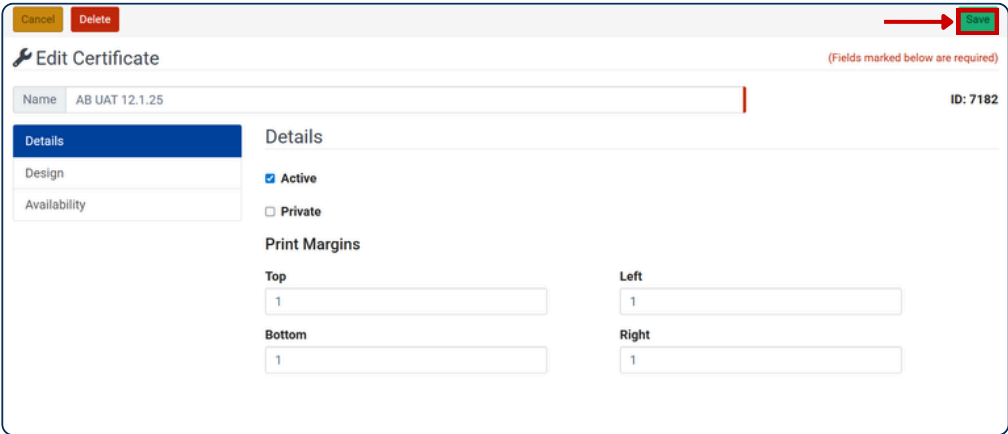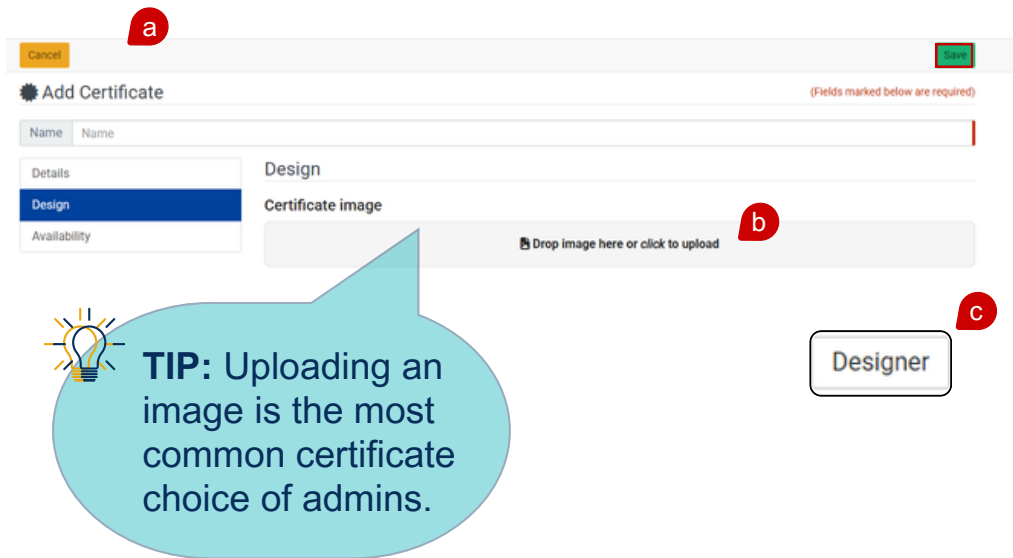
4 Add New Certificate (continued)

DETAILS

(a) Name the certificate here

(b) Select the **Active** checkbox to make the certificate available for use

(c) When a certificate is made **Private**, only individuals within the same group have access

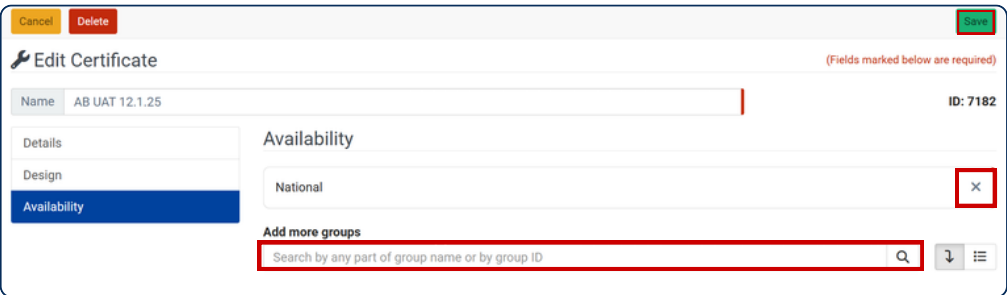**(d)** Adjust the **Print Margins** to suit the size of the certificate

>> Remember to click the green Save button.

DESIGN

TIP: Uploading an image is the most common certificate choice of admins.

(a) Enter the **Name** of the certificate.

(b) Click to upload a certificate image or drop an image by dragging one over the gray box.

(c) Once the image is loaded, click on the **Designer** button to create and edit a more detailed certificate.
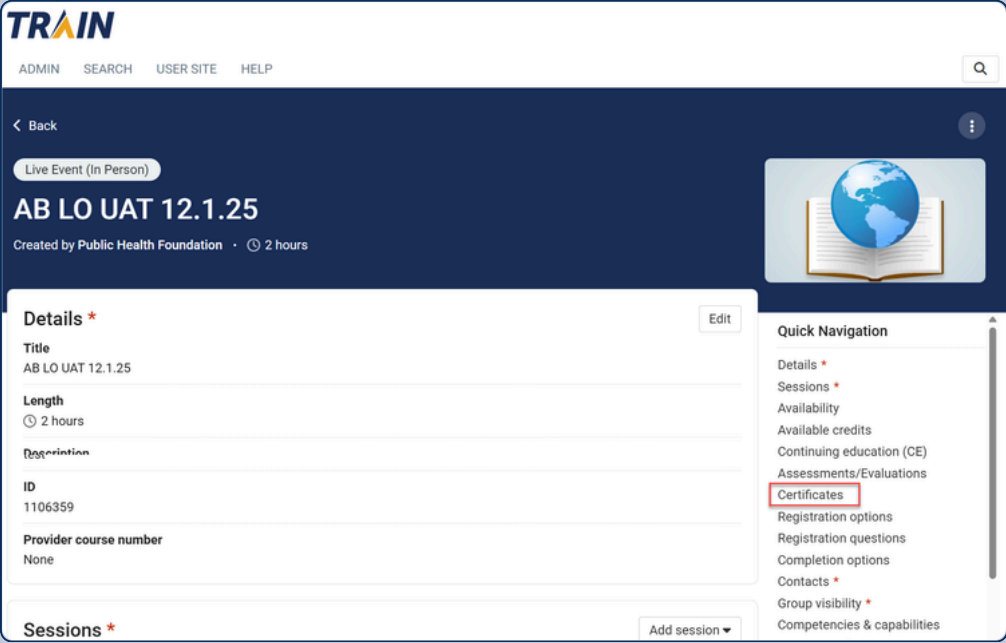
AVAILABILITY

Add group access to the certificate by typing in the search bar under **Add more groups**. Click **x** to remove access to National if the certificate should not be offered to everyone.

>> Remember to click the green Save button.

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Add New Certificate

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Once a certificate is created, add the certificate to a course within the course edit feature. In the Quick Navigation menu, select Certificates.

Click the **Add** button to locate and attach the certificate.

(a) **Search** the certificate by title. Once found, click the green **+** button to add the certificate

(b) To simplify search, Filter certificates.

(c) Enter a **Start date** for certificate availability

(d) Enter an **End date** to conclude certificate availability

(e) Include **Credit type**, if applicable.

(f) Enter **Custom text** if the attribute was used.

Click the blue Save button.

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