

# 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.



## 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.

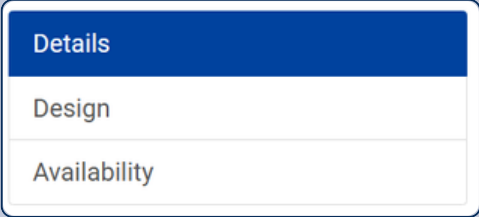
A screenshot of the 'Certificates' page in the TRAIN system. The page has a top navigation bar with 'ADMIN', 'SEARCH', 'USER SITE', and 'HELP'. Below this is a 'Certificates' section with a search bar (a), checkboxes for 'Include inactive' (b) and 'Include all public certificates' (c), and a dropdown menu for sorting (d). The search bar contains the text 'Search certificates by keyword or ID'. The dropdown menu is open, showing options: 'Relevance', 'A-Z', 'Z-A', 'Newest', and 'Recently modified'. A red arrow points from the 'Recently modified' option to a tip bubble. The tip bubble contains the text: 'TIP: If you search by keyword, the list will sort by relevance.' Below the search bar, there is a table of certificates with columns: Title, Availability, Created, and Updated. The first row is 'SD Certificate of Completion' with 'Public' availability, 'Dec 13, 2021' created, and 'Dec 12, 2025' updated. A red box highlights the three-dot menu icon next to the 'Updated' date. A red arrow points from this icon to a dropdown menu showing options: 'Edit', 'Clone', 'View appointed courses', and '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.

# 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

- (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

Cancel Delete

Save

Fields marked below are required

ID: 7182

Name AB UAT 12.1.25

Details

Design

Availability

Active

Private

Print Margins

Top 1

Bottom 1

Left 1

Right 1

>> Remember to click the green Save button.

Design

Cancel Delete

Save

Fields marked below are required

ID: 7182

Name AB UAT 12.1.25

Details

Design

Availability

Certificate image

Remove

Print preview

Certificate fields

Designer

There are no certificate fields defined.

- (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.

Cancel

Save

Certificate Designer

+ Add field Clear Grid lines

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

User ID

Custom Course Attributes

Custom User Attributes

CERTIFICATE OF COMPLETION

This is to certify that

Ethan Parker

Graduated with honors from the Financial Manager course.

Performed well with reporting, delved into planning and budgeting.

Michael Wilson

Jack Brvan

Edit Certificates (continued)

3

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

+ Add field Clear Grid lines

A B I S U Color: [color picker]

Width Height Top Left

- >> 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.

- 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

Availability

Cancel Delete Save

Edit Certificate (Fields marked below are required)

Name AB UAT 12.1.25 ID: 7182

Details Design Availability

Availability

National x

Add more groups

Search by any part of group name or by group ID

- 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.

Add New Certificate

4

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

TRAIN

ADMIN SEARCH USER SITE HELP

< Back Certificates Add new certificate

☐ Include inactive ☒ Include all public certificates

Search certificates by keyword or ID

2,951 record(s) found. Recently modified

Title	Availability	Created	Updated
AB UAT 12.1.25	Public	Dec 1, 2025	Dec 17, 2025

Details

Design

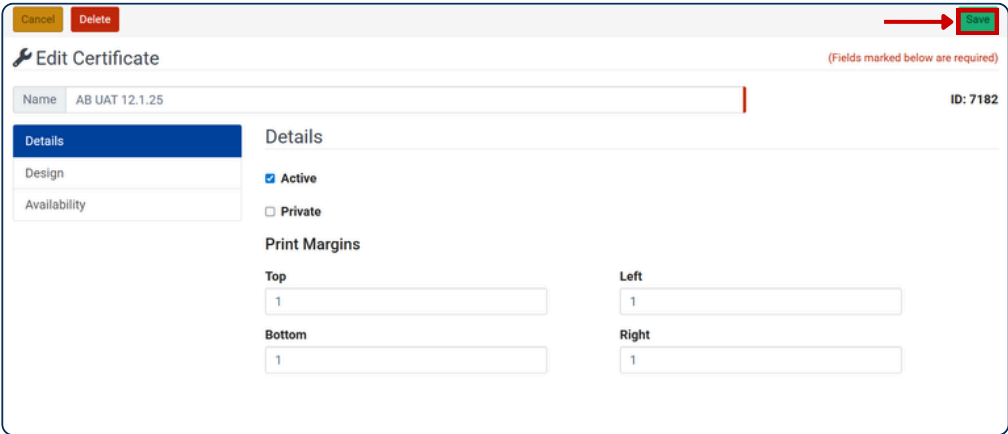
Availability

4

Add New Certificate (continued)

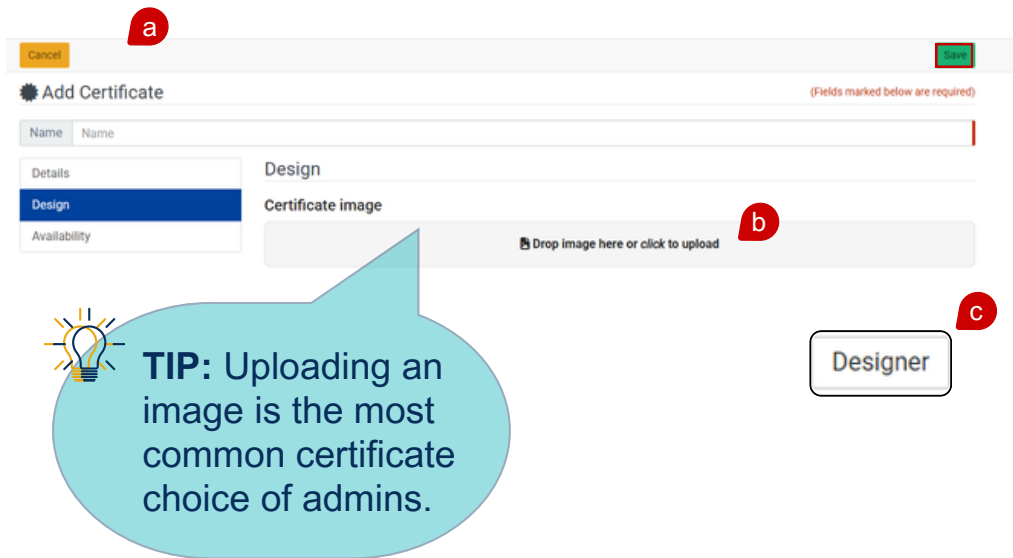
DETAILS

- (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



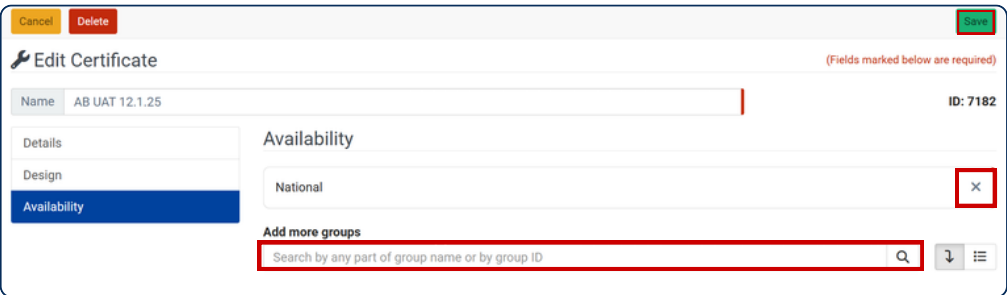
>> Remember to click the green Save button.

DESIGN



- (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.

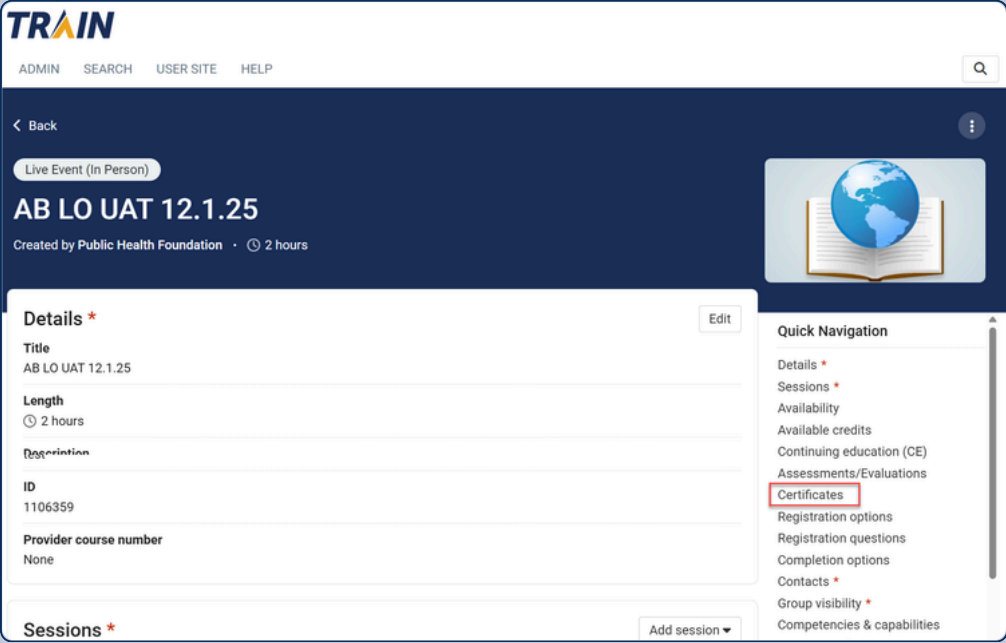
AVAILABILITY



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.

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 screenshot of the 'Add certificate' form. It contains several sections: 'Search certificate' with a text input field (a) and a dropdown menu (b); 'Delivery' section with 'Start date' (c) and 'End date' (d) fields; 'Credit type' dropdown (e); and 'Custom text' (f) section. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

(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.