# Certificate Management

The Certificate Management functionality allows you to create and edit certificates for use with courses. Certificates can be assigned to courses by themselves or can be assigned to specific credit types. Let's take a closer look.

Accessing Certificate Management

▶ To access the Certificate Management functionality in TRAIN, click the 'Admin' link, then the 'Content' link, followed by the 'Certificates' link. Here you have two options, 'Add New Certificate' or 'Find & Edit existing certificates.' First, we'll take a look at finding existing certificates.

Add New Certificate ✚ Add a new certificate to the system.	**Find & Edit existing certificates** 🔍 Find/edit certificates, and modify their visibility and content.
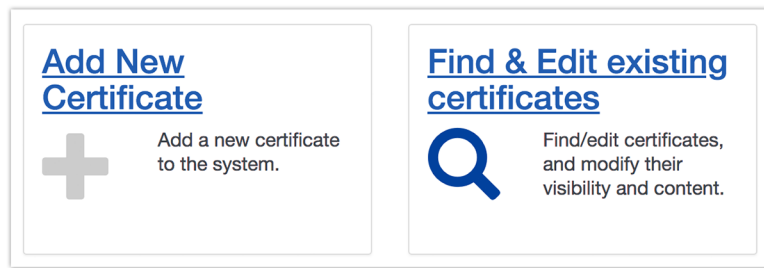
Searching For and Managing an Existing Certificate in TRAIN

▶ When you access the 'Find and Edit an existing certificate' section, the search bar will be available for you to perform a search for a certificate that may already be listed in TRAIN. To perform the search, simply type the certificates' name in the provided text field then click the magnifier icon or press the 'Enter' key on your keyboard to begin the search. The number of records found will be listed under the search bar.

Search 🔍	Relevance ⬍

2,103 record(s) found. Show inactive

Certificate ✕

✎ TX DSHS 2015 Designing Education 5 CORE	Cert ▾
✎ 02. April 13 A Day at the Beach	Cert ▾

To change the sort of your search, click the 'Relevance' dropdown menu then click either the Name: A-Z, Name: Z-A, or Newest option. You may also include inactive certificates in your search by clicking the 'Show inactive' link found under the search bar. Each certificate will be listed by name with an 'Inactive' status listing if applicable.

✓ Relevance
Name: A-Z
Name: Z-A
Newest
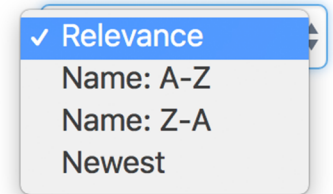
You may click the provided down arrow on the right side of the listing to view details regarding the certificate such as the number of courses that the certificate has been appointed to, its creator, and the date it was created.

✎ TX DSHS 2015 Designing Education 5 CORE	Cert ▴
✏ Edit Certificate	
👤 Clone Certificate	*c 5, 2014*

Once you've found the certificate that you would like to edit, click the 'Edit' icon to the left of the certificate name. If you have edit rights to the certificates, you will have two options - 'Edit Certificate' or 'Clone Certificate'.

Cloning a Certificate

▶ Cloning a certificate is useful in many cases. You may want to re-use and update an existing certificate or use a public certificate and edit it for your own use. To clone a certificate, find the certificate using the 'Find and Edit an existing certificate' functionality and chose the 'Cone Certificate' option from within the 'Edit menu.' You will need to confirm that you wish to clone the certificate, then you will have the option to edit your cloned certificate.
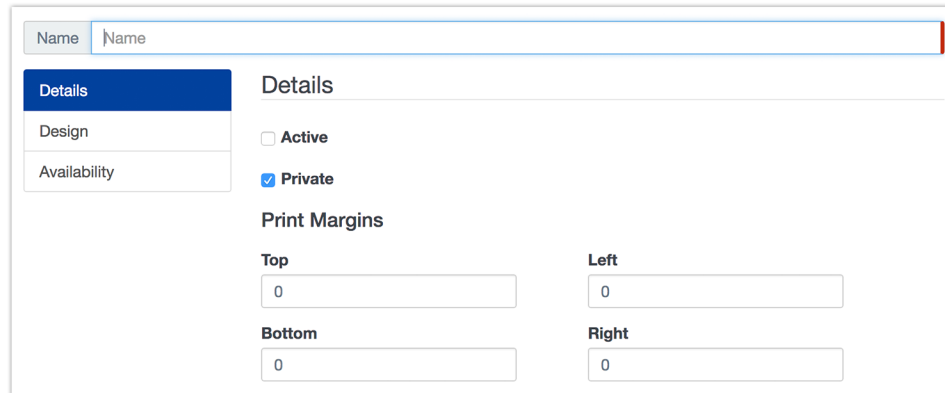
ADDING A NEW CERTIFICATE IN TRAIN

Add a new certificate to TRAIN by choosing the 'Add New Certificate' option from within the 'Certificates' page. The options within the 'Add Certificate' page and 'Edit Certificate' page are the same.

The Add/Edit Certificate Pages

▶ The Add/Edit Certificate pages are divided into the following sections:
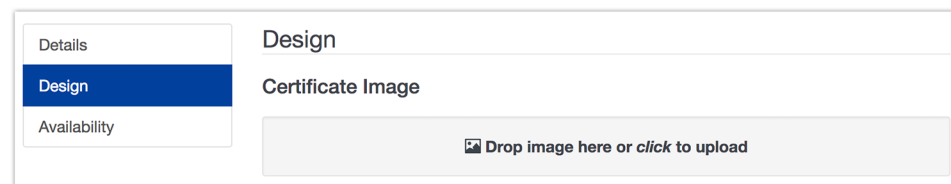- Details
- Design
- Availability

Details

▶ When you launch the Add Certificate wizard, the title field for the certificate will be a required field to edit. To create a new certificate, enter a certificate name in the text field. Your certificate name must be unique. If there is a certificate that already exists in the TRAIN database, a message will appear stating, *"This certificate is already in use by you or another provider."*

Name	Name

	Details
Details	
Design	☐ **Active**
Availability	☑ **Private**
	Print Margins

Top	Left
0	0

Bottom	Right
0	0

By default, your new certificate will be listed on TRAIN as inactive until you place a check in the 'Active' checkbox to activate it. Only active certificates can be assigned to courses. If you prefer to keep your certificate private, leave the 'Private' checkbox checked; however, you may share your certificate for other TRAIN Admins to use and modify for their specific use by unchecking the 'Private' checkbox. You may also set the print margins for your certificate by entering your preferences in the provided top, bottom, left, and right print margin text boxes. Generally, these are left as is.
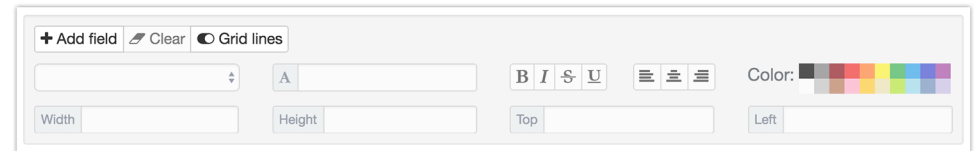
Design: Certificate Image

▶ To create your certificate, you must use an image. Drag and drop your image into the provided certificate uploader. You may also browse your system to upload your image. For best results, use a certificate template that is 8.5 x 11 inches.

	Design
Details	
Design	**Certificate Image**
Availability	
	🖼 Drop image here or *click* to upload

Once your image is uploaded, the 'Print Preview' button will create a PDF version of your certificate for preview. You must first define the certificate fields to view a finalized version of your certificate when you click the 'Print Preview' button. To do this, click the 'Designer' button to format and design your certificate.
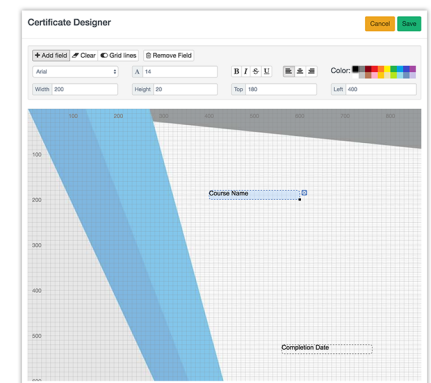
Certificate Designer

▶ Click the '+Add Field' button to add one of the following content fields to your certificate:

- Completion Date - The date the course was completed. When selecting this field, you will have the option to choose the date format.
- Conference Name - This option will show the conference name if the certificate is associated with a conference.
- Course Name - This option will show the course name if the certificate is associated with a course.
- Credit - This option will display the credit name.
- Custom Text - If custom text is added within the course, you can display it using this option.
- Course Location - For Live Event (In Person) and Exercise courses, you can display the location of the course.
- Provider Name - This option will display the course provider name.
- Session Dates - For live event course types, will display the session dates.
- Course Level - This option will display the course level selected within the course details.
- UserID - This option displays the users numeric ID number from TRAIN.

When you select an option from the 'Certificate Designer' dropdown menu, it will appear on your certificate. You may click and drag the text box to any portion of your certificate to suit your design preference. You can also set the font, font size, alignment, type, color, width, height, etc. for each content box. You can adjust the size of each content box using the width, height, top, left, text boxes, or by clicking on the box then clicking and dragging the black box in the bottom right of the content box. You can also remove a specific content box by selecting it and using the 'Remove Field' button at the top of the page or clicking the 'X' in the top right of the content box.

The 'Completion Date' field has an additional option of 'Date Format.' Please note that you cannot enter content in any of the text boxes. Content is drawn from the system to populate each text box that you specify.

You have the option of removing all text boxes by clicking the 'Clear' button. You will receive a prompt to confirm this selection.

Grid lines and pixel measurements are useful while you are designing your certificate. They serve as a reference as you align content. You may click the 'Grid Lines' button to hide the grid lines and pixel measurements if you desire. Please keep in mind that the grid lines will not appear in your final design. They only serve as an alignment tool for designing purposes.

If you do not want to save your design, click 'Cancel.' If you are satisfied with your design, click the 'Save' button to move to the next steps.

Design: Certificate Fields
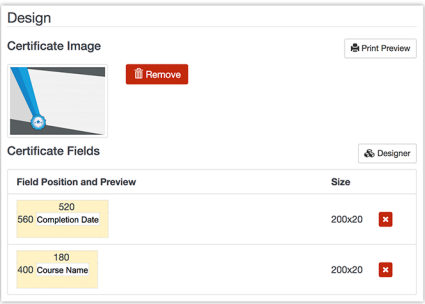
▶ The 'Certificate Fields' section of the Edit Certificate Design page provides you information regarding the placement and size of your individual text boxes. Simply click the 'Designer' button to edit your certificate design or click the 'X' button next to a specific text box to delete it from your certificate.

Again, click the 'Print Preview' button to view your certificate as you design it or to see the finalized version.

Availability

▶ The 'Availability' section of the menu shows a tree view of all groups within TRAIN along with a search option and a separate listing of selected groups. There is also a list view that allows you to search through specific groups. By default, all newly created certificates are assigned to the group that the admin has the 'Certificate Management' role for. At least one group must be selected for a certificate. The group selection for the certificate determines which ADMINS can see and use the certificate for their courses within TRAIN. For example, if you select the 'National' group, it makes the certificate available to all ADMINS within TRAIN, while selecting the 'Arizona' group will make it only available to those ADMINS within the 'Arizona' group. The same is true if you expand the group tree and select a sub-group. In that case, the certificate will only be available to ADMINS within and below that sub-group.

To select a group when viewing the tree view, simply click the checkbox next to the group name. All Admins within that group and all of its sub-groups will have access to the certificate.
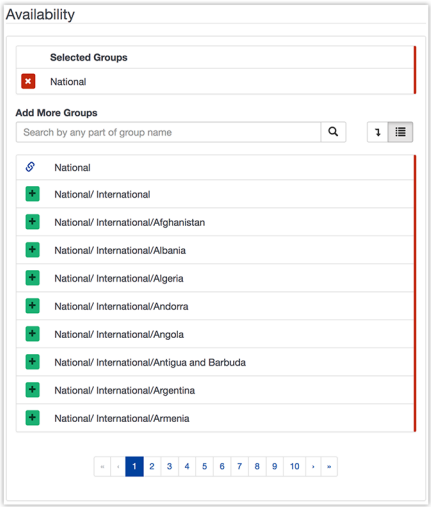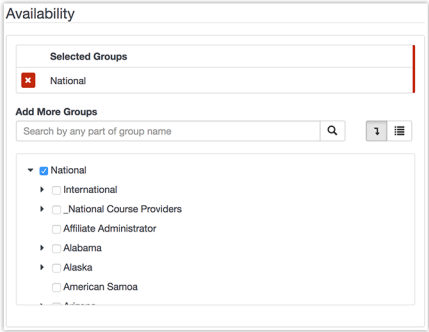
To select a group while using the list view, click the '+' to the left of the group name. Once selected, a link icon will appear to the left of the name to indicate it has been selected.

The selected groups are listed under the 'Selected Groups' section. To remove a group, simply click the 'X' to the left of the group name. After you've completed these steps, click the green 'Save' button to save your new certificate entry or the edits to your existing certificate.

Adding a Certificate to a Course

▶ For a walkthrough on how to add a course to TRAIN and how to add a certificate to a course, please refer to the 'General TRAIN Course Wizard' tutorial. There, you will receive details regarding the 'Certificates' page section where certificates are added to the course.