



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

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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 header with 'ADMIN', 'SEARCH', 'USER SITE', and 'HELP'. Below the header, there's a 'Back' link and a 'Certificates' title. A search bar is labeled with a red circle 'a'. Below the search bar, there are two checkboxes: 'Include inactive' (labeled with a red circle 'b') and 'Include all public certificates' (labeled with a red circle 'c'). Below these checkboxes is a table of certificates. The table has columns: 'Title', 'Availability', 'Created', and 'Updated'. The first row is 'SD Certificate of Completion', 'Public', 'Dec 13, 2021', 'Dec 12, 2025'. The second row is 'P3N Administrator Training-Creating Users', 'Public', 'Aug 22, 2025', 'Aug 22, 2025'. The third row is 'AB LW Test 8.7', 'Public', 'Aug 7, 2025', 'Aug 7, 2025'. The fourth row is 'General CEU Certificate', 'Public', 'Jul 15, 2025', 'Jul 15, 2025'. A red circle 'd' is placed over the three-dot menu icon in the 'Updated' column of the first row. To the right of the table, there's a dropdown menu for sorting, currently set to 'Recently modified'. The dropdown options are: 'Relevance', 'A-Z', 'Z-A', 'Newest', and 'Recently modified'. A red arrow points from the 'Recently modified' dropdown to a speech bubble that says 'TIP: If you search by keyword, the list will sort by relevance.' Below the table, there's a modal window showing the 'Edit' option for the first certificate. The modal has a title '2025 Dec 17, 2025' and 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 Group visibility menu. You can toggle between without saving progress.

- >> **Details**: Set the certificate as active and non-private
- >> **Design**: View and alter the appearance and fields in the certificate
- >> **Group visibility**: Set editing visibility

A 'Quick Navigation' menu with a dashed line separator. It contains three items: 'Details', 'Design', and 'Group visibility'. Below these items is a link that says '↑ Scroll to top'.

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) Click on the “Edit” button to view the **Certificate Designer**
- (c) Use the **Tools** section to edit or add fields and design features to the certificate
- (d) Click on each of the **Fields on certificate** to edit the details shown on your certificate

>> Remember to click the green Save button.

Edit Certificates (continued)

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

- Use the **+ Add field** feature to incorporate dynamic attributes in the certificate
- Use the **Clear** feature to remove all attributes from the certificate
- In the **Field on certificate** section click the “+” symbol to the left of each item to view and edit **Field properties**

Group visibility

Add or remove group access to the certificate by:

(a) Clicking the **Add** button and typing an available group name in the search bar

Click the blue **Apply** button.

(b) Clicking the **X** to remove existing groups

Add New Certificate

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From the Certificates page, click the **Add new certificate** button to access the Details, Design, and Group visibility menu.

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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.

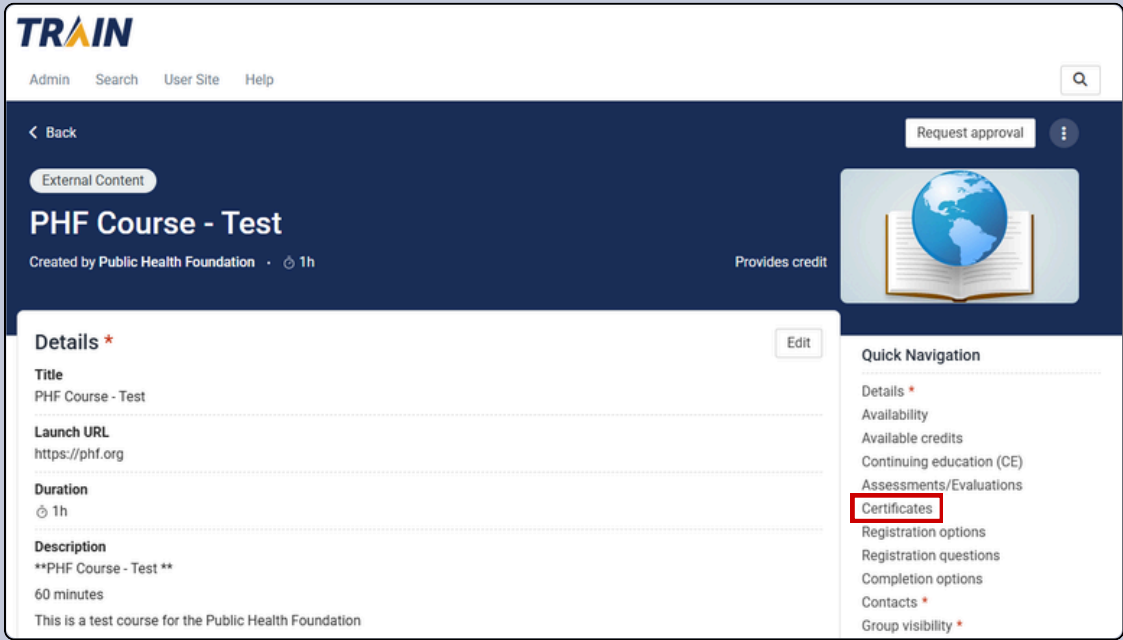
- (a) Click **Upload Image** to add a certificate background image to start designing.
- (b) Upload a certificate image by clicking here or drag and drop one over the gray box.
- (c) Once the image is loaded, click “Edit” in the **Design** section to access the Certificate Designer **Tools**.
- (d) Click “+ **Add field**” to load custom text boxes in the certificate

GROUP VISIBILITY

- Add group access to a certificate by clicking **Add** then typing in the search bar.
- Click **x** to remove access to National if the certificate should not be offered to everyone.

>> Remember to click the blue **Apply** button.

Once a certificate is created, add the certificate to a course within the course edit feature. Select the **Certificates** tab in the Quick Navigation menu.



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



(a) **Search** for the certificate by typing the title in the search bar. Once found, click the green + button to add the certificate

(b) Select a Filter to simplify the search for a certificate

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

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

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

(f) Enter **Custom text** if this field was used on the certificate



Click the blue Save button.