

# Certification Completion Editor

The program and certification completion editor provides site administrators (or users with the [appropriate permission](#)) a flexible way to manage a user's progress in a program or certification.

Features of the editor include:

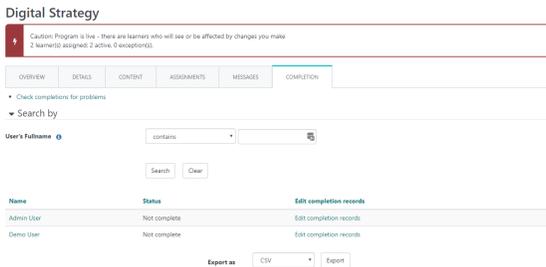
- A list of all users who are (or were) assigned to a program or certification
- The ability to manually make changes to the current completion record of a user
- Validation of a user's current and historical records, with information stating any issues and how they can be resolved
- The ability to view, add, edit or delete program or certification history for users, even if they are no longer assigned
- A full audit trail of all changes to a user's program or certification completion records
- A checker which can identify any program or certification records that contain problems
- Automated fixes which can be triggered to fix discovered issues

## Enabling the editor

The completion editor is turned off by default, however it can be enabled by going to *Site administration* > *Advanced features* and enabling (checking) the **Enable program completion editor** option.



Once enabled the **Completion** tab will be made available to users with the **totara/program:editcompletion** capability (Site administrators only by default) when editing a program or certification and allow them to edit current and historical completion records.



## Using the editor

To access the editor, first locate and edit the program or certification you want to check, then select the **Completion** tab.

## Completion list

The completion list is an embedded report source and the primary purpose of this report is to provide an interface with a list of users who are currently (and were previously) assigned.

Each user has a status which indicates their status and a link to edit completion records. Clicking the link will take you to the completion editor for that user, which includes the current completion editor, completion history editor and the transactions log. Above the completion list there is a link to check completions for problems, which can be used to find all records with an invalid state for the given program or certification.

Custom reports can also be created in Report Builder using the **Program Membership** or **Certification membership** [report sources](#).



If you edit a Program or Certification content then users who haven't completed the Program or Certification will need to complete this under the new structure. If a user has completed a Course Set in a Program or Certification and the Course Set is edited the users won't need to complete the edited course set.

## Edit completion records

To edit the completion records for a specific user, click **Edit completion records** in the completion list.

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The Totara Academy has a whole course dedicated to using [Programs and certifications](#) in Totara Learn. Here you can learn more on how to use programs and certifications, see best practice, and give it a go yourself.

## Current completion record

This section contains the user's current completion record, if they are currently assigned. The editor is controlled primarily by the state in the drop down list. Changing the state will determine the form fields which can be edited. Other fields may not be editable, but will be changed automatically to be consistent with the newly selected state.

If there is a problem with the record then it will be highlighted and a valid state must be selected before any further changes can be made. When saving changes, information will be provided on a confirmation page, detailing the consequences of the changes. For example, if you change the state of a certification from **Certified, window is open** to **Certified, before window opens** then you will be warned that the recertification window will be reopened when it is next processed by cron, causing courses to be reset again.

Depending on the scenario an automated fix may be available which can be run to correct a problematic record. Other records may include suggestions for manual fixes, however you should ensure that the suggested fixes are appropriate for what you are trying to achieve before acting on them.

Completion records for Admin User in Compliance certification 1

- Return to certification

This user is assigned for the following reasons:

- Assigned as an individual.

Current completion record

Certification completion state Newly assigned

In progress No

Certification status Not certified

Renewal status Not due for renewal

Certification path Certification

Due date 22 November 2018 11:30 Enable

Completion date Not applicable (0 in database)

Window open date Not applicable (0 in database)

Expiry date Not applicable (0 in database)

Certification active period 1 year(s)

Certification window period 1 month(s)

Apparent active period Not applicable

Apparent window period Not applicable

Program status Program incomplete

Program completion date Not applicable (0 in database)

All dates will be rounded down to the nearest five minutes.

Completion history Expand all

Transactions



Certification messages are only reset if the **window open** event happens, if the editor is used to bypass this then the messages will not be sent

## Completion history

This section shows completion history. Here you can add, edit and delete history records. Form validation when editing history records is the same as when editing current completion records, but there is no information and confirmation step when saving (because history records do not have an effect on a learner's active learning process).

Completion history Collapse all

| ID | Completion history state       | Completion date                    | Expiry date                         | Unassigned | Has problem | Edit | Delete |
|----|--------------------------------|------------------------------------|-------------------------------------|------------|-------------|------|--------|
| 9  | Certified, before window opens | Tuesday, 23 February 2016, 5:23 PM | Thursday, 23 February 2017, 5:23 PM | Yes        | No          |      |        |
| 6  | Certified, before window opens | Wednesday, 21 July 2010, 12:00 AM  | Thursday, 21 July 2011, 12:00 AM    | No         | No          |      |        |
| 8  | Expired                        | Not applicable (0 in database)     | Not applicable (0 in database)      | Yes        | No          |      |        |

## Transactions

This section shows a list of all transactions that have occurred which relate to the user. This technical information can be used by site administrators and developers to assist with troubleshooting.



Only transactions that have taken place since upgrading to a version of Totara that contains the editor will be recorded.

It includes:

- Events that naturally occur during certification, such as becoming certified, the certification window opening, expiry, etc.
- Manual changes made to the current or history completion records using this editor.
- Changes to the certification settings, such as the active period (this type of change might not directly affect a user's completion records, but the fact of the change might be relevant, so is included in this log).
- Changes cause by certification completion uploads, or triggered indirectly by course completion uploads.
- Automated fixes which were applied.

▼ Transactions

| Date / time     | Change made by              | Description                                                                                                                                                                                                                                                              |
|-----------------|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 |                             | User was assigned <ul style="list-style-type: none"><li>• Status: status_notornified (1)</li><li>• Renewal status: renewalstatus_notdue (0)</li><li>• Certification path: certification (1)</li><li>• Due date: 23 February 2017, 17:23 (1487870592)</li></ul>           |
| 24/02/16, 20:34 | Tom Ireland (Administrator) | <ul style="list-style-type: none"><li>• Completion date: Not set (0)</li><li>• Window open date: Not set (0)</li><li>• Expiry date: Not set (0)</li><li>• Program status: Complete (1)</li><li>• Program completion date: 23 February 2016, 17:23 (1456248192)</li></ul> |
| 24/02/16, 20:33 | Tom Ireland (Administrator) | Unassigned, current completion removed (not archived due to no progress)<br><br>User was assigned <ul style="list-style-type: none"><li>• Status: status_notornified (1)</li></ul>                                                                                       |