

# 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

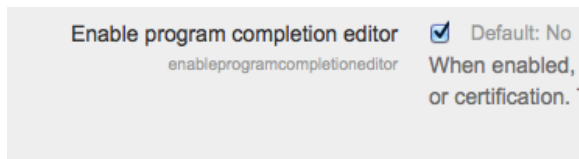
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The program and certification completion editor tool was released in Totara versions 2.5.36, 2.6.29, 2.7.12 and 2.9.4. To be able to use the tool you must be on one of these versions (or higher).

## Enabling the editor

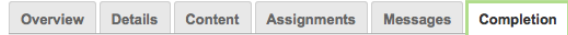
The completion editor is turned off by default, however it can be enabled by going to *Site administration* > *Advanced features* and enabling (checking) the **Enable program completion editor** option.



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.

### Health & Safety

Caution: Program is live - there are students who will see or be affected by changes you make. 0 learner(s) assigned. 0 learner(s) are active, 0 with exception(s)



## 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**


Check completions for problems

Search by

User's Fullname

Name	Status	Edit completion records
Thomas James	Certified	<a href="#">Edit completion records</a>
Gavin Williams	Expired	<a href="#">Edit completion records</a>
Aiyana Grace	Not certified	<a href="#">Edit completion records</a>
Gordon Donald	Expired	<a href="#">Edit completion records</a>

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.


## 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.

Current completion record

 There is no specific information relating to this error or particular combination of errors. It may be that it is a combination of other explainable errors. The records can be fixed manually, but care should be taken to ensure that the correct solution is chosen. It should be reported to Totara support if there are many instances or if it occurs frequently.

Certification completion state  Best guess: Newly assigned

In progress

Certification status

Renewal status

Certification path

Due date   Enable

Completion date

Window open date

Expiry date

Certification active period 1 year

Certification window period 1 month


Apparent active period 0 year(s)

Apparent window period 0 year(s)

Program status  Program status should be 'Program incomplete' when user is newly assigned.

Program completion date  Program completion date should be empty when user is newly assigned.

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

 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		

[Add history](#)

## 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
24/02/16, 20:34	Tom Ireland (Administrator)	User was assigned <ul style="list-style-type: none"> <li>• Status: status_notcertified (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> <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) <ul style="list-style-type: none"> <li>• User was assigned</li> <li>• Status: status_notcertified (1)</li> </ul>