



## External Documents

V.2

**\*\*\*\* DRAFT \*\*\*\***

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## Summary

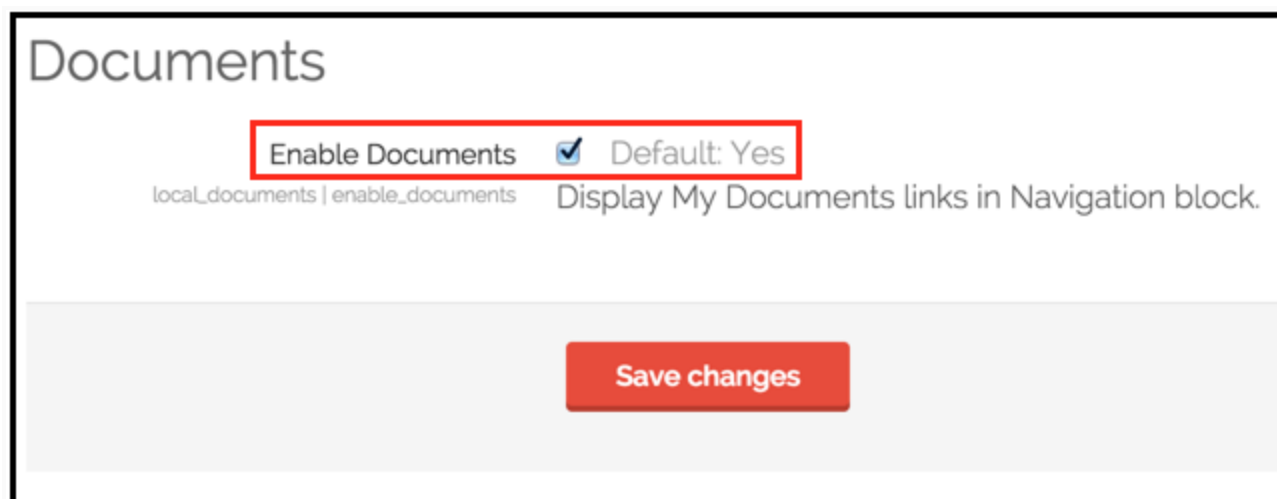
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The LMS system tracks all achieved certificates for each individual user and presents this data in a Certificates Report for site administrators. Certificates achieved outside of the LMS are known as external documents and are a Refined Training plugin that allows authenticated users to upload third-party (external certificates) to their profile in addition to the certificates achieved within the LMS. End users can view their LMS and external certificates in the My Certificates report as well as view any historical certificates achieved from previous platforms.

## Administrative setup

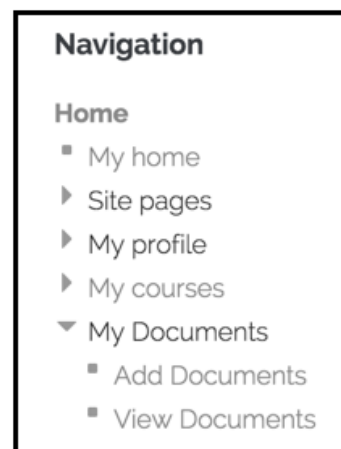
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Site administrators can enable external documents by navigating to **site administration >>>> plugins >>>> local plugins >>>> documents**. Locate **enable documents** and check the checkbox to display the **my documents** link in the navigation block on the front page.



Return to the navigation block on the front page and locate the **my documents** menu.


Click the triangle icon to open the **my documents** menu and select **add documents** to add third-party PDF certificates.




The **add document** form will display where the certificate course information, the date the certificate was received, and the organization the certificate is associated with must be filled in. Select **add** or **drag and drop** the certificate PDF to add the external certificate to the system.

**Course\***

**Certificate**

**Received\***    





**Grade**

**Expires**      Enable


**CE Hours**

**Organization\***

**Attach File\*** Maximum size for new files: Unlimited, maximum attachments: 1





  

▶ Files



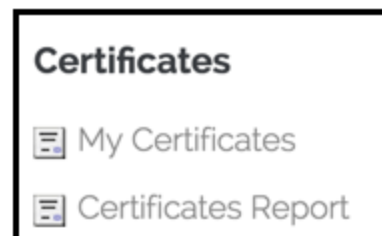
You can drag and drop files here to add them.

Return to the navigation block on the front page and select **view documents** from the my documents menu. All added documents will display with the course name, certificate name, date the certificate was received, and an expiration date. The icons to the right provide the ability to edited (gear icon), delete (x icon), or download (arrow icon) the external document.

Course	Certificate	Received	Expires	
Avalanche 1 Certification	Basic Level	20150106	None	  

## My certificates

End users can access both LMS certificates and external documents within the LMS. To do this, navigate to the **certificates** block >>>> **my certificates**.



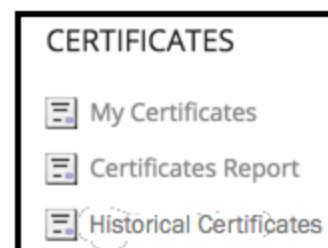
The my certificates list will display, revealing all LMS-issued and external certificates for that user.

Certificates For Kalie [REDACTED]			
Date Received	Course Name	Certificate Name	Code
May 6, 2015	Avalanche 1 Certificate	Intermediate Level	N/A
April 1, 2015	Basic Avalanche Certification	Basic Level - Mountain Skills	dnt8HPoDMn

External certificates do not have system codes and show **N/A** in the code field. This is because the code is only created and associated for certificates generated inside the LMS.

## Historical certificates

Site administrators and end users have the ability to view historical certificates that were achieved by the user in a previous system and imported to the LMS.

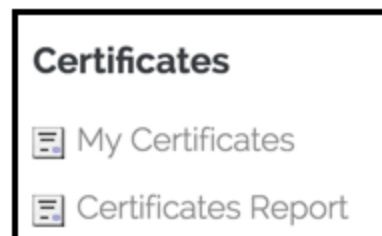








Navigate to the **certificates** block >>>> **historical certificates** to view a list of historical certificates. Generally, the listing will show showing the date the certificate was received, the name of the certificate, the amount of credits associated with the certificate, and the ability to access (download) the certificate. However, because this information is imported from other systems, the report may vary.

Historical Certificates			
Date Received	Certificate	CEUs	Access
May 6, 2015	Avalanche 1 Certificate	2	

## Administrative reports

A **certificates report**, listing all certificates earned on the site, is available to site administrators in the **certificates** block >>>> **certificates report**. Any external documents (i.e. external certificates), will be listed without a certificate code.



Betty Red	April 10, 2014	First Aid Course	Basic Certificate	N/A
Betty Red	February 27, 2014	Live Events in 2014	Winter Ice Event Certificate  	aSXlsL5TnP
Betty Red	February 19, 2014	Sales Live Event	Location B Certificate  	aCRxqONRid
Betty Red	February 27, 2014	Live Events in 2014 RS1	Winter Ice Event Certificate  	aSXlsL5TnP

## Flexible certificates report

The **flexible certificates** report, which provides information about the status of a user's progress through a course, displays the names of external documents (i.e. certificates) under the **external** column. Unlike certificates earned in the LMS, external documents cannot be deleted by an administrator or emailed to the user.



NAME	EMAIL	COURSE	INTERNAL	EXTERNAL	DATE ACHIEVED
Betty Red		First Aid Course		Basic Certificate	2014-04-10
Betty Red		May. Course	Manager Certificate		2014-05-12

## Manager report

External documents also appear on the [team certificates report](#) for managers. These external documents are distinguished by the word “external” before the name course.

Kalie's People		
User	Course	Certificate
Betty Red	EXTERNAL:First Aid Course	Basic Certificate
Betty Red	June Discovery Course	Basket Weaving through the Ages
Betty Red	Live Events in 2014	Winter Ice Event Certificate
Betty Red	Live Events in 2014 RS1	Winter Ice Event Certificate
Betty Red	May_1_TFC	Manager Supervisory Certificate
Betty Red	Sales Live Event	Location B Certificate
George Norris	M27 Test Course	Managing Inventory
Margaret Hennessey	August Initiatives	Orange Group Certificate
Peter Thurman	August Initiatives	Orange Group Certificate
Wilma Morrison	August Modality Exploraiton	First Modality Certificate
Wilma Morrison	June Discovery Course	Live Session Certificate

## Changing the terminology

The term “documents”, can be changed in the language strings. To do this navigate to **site administration >>> language >>> language customization >>> select a language >>> click open the language pack for editing >>> click continue** when the language pack has loaded >>> scroll to the **local** heading >>> and select **local\_documents.php** and click **show strings**.

In the **local\_documents** customization boxes enter the new terminology and click **save changes to the language pack**. To confirm the update, spot check the system. If the update does not appear, clear the cache and re-attempt the update in the language string.

▼ Filter strings

**Show strings of these components**

**Customised only**

**Help only**

**Modified only**

**Only strings containing**

**String identifier**

local\_backgrounds.php

local\_certificates.php

local\_core.php

local\_coursefields.php

local\_documents.php

local\_dropdowns.php

local\_formedits.php

Show strings