



Part of the  
**Enginuity** Group



**Certify**

**Third Party Portal**

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**User Guide**

# Document Information

## Version History

Date	Version	Author	Description of change
17/8/21	1.4	DH	Document review
27/9/21	1.4	DH	DCWeb 1.2 review
13/10/21	1.4	DH	Add reactivation of connection
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17/01/22	1.4	EL	Changes
26/01/22	1.4	EL	View Document Changes
20/09/22	1.4	EL	1.4 Amendments

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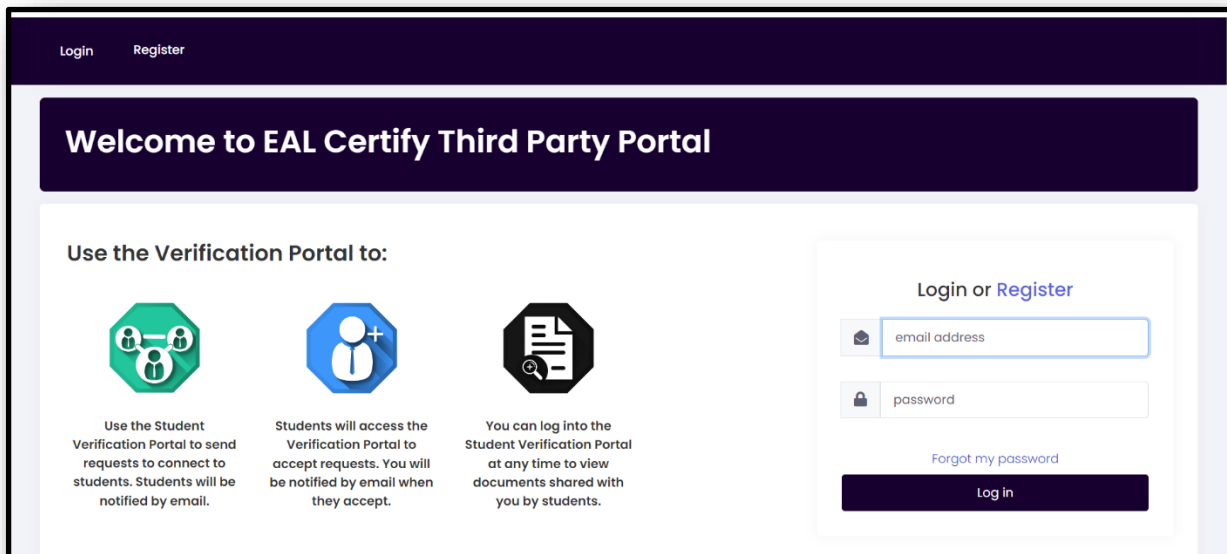
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# 1 User Guide for the Verification Portal

## 1.1 Introduction

This guide provides instructions on how to use the Verification portal of Certify software application.

It is intended for any third party (prospective employer, etc) to view electronic qualifications and status documents.



## 1.2 What is the Verification portal for Certify?

The Verification portal enables you to view an electronic version of a Learner's qualification and status document by accepting connection requests and registering on the system.

These requests:

- Are sent by a Learner via email who are registered on the Learner portal
- Require you to register on the portal, thereby giving you secure access to the documents in question, for a set period (all connection requests have a set expiry date)
- Can be extended by you or the Learner
- Can be cancelled by either party, at any time
- Enable you to request the reactivation of an expired or cancelled connection
- Enable you to send connection requests to other Learners.

## 2 Getting started

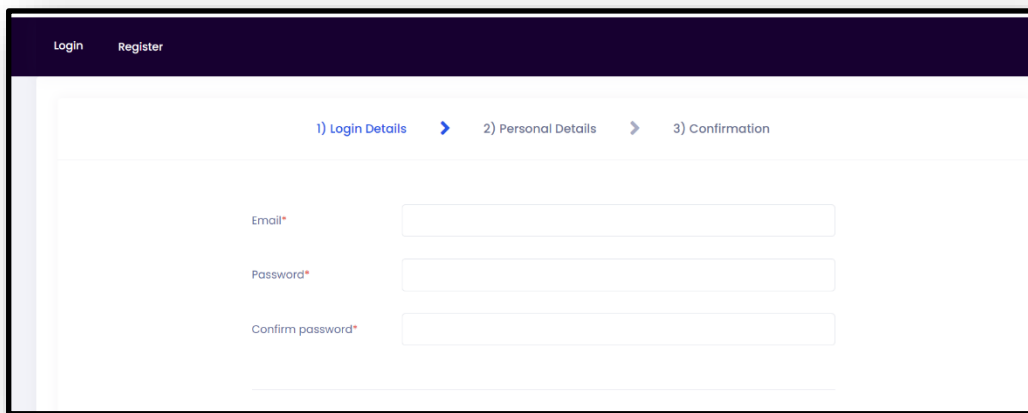
### 2.1 Introduction

Getting started is very easy. It requires you to register with the Verification portal then log in. Steps are provided below

### 2.2 Registering with the system

#### 2.2.1 Page one – Log in details

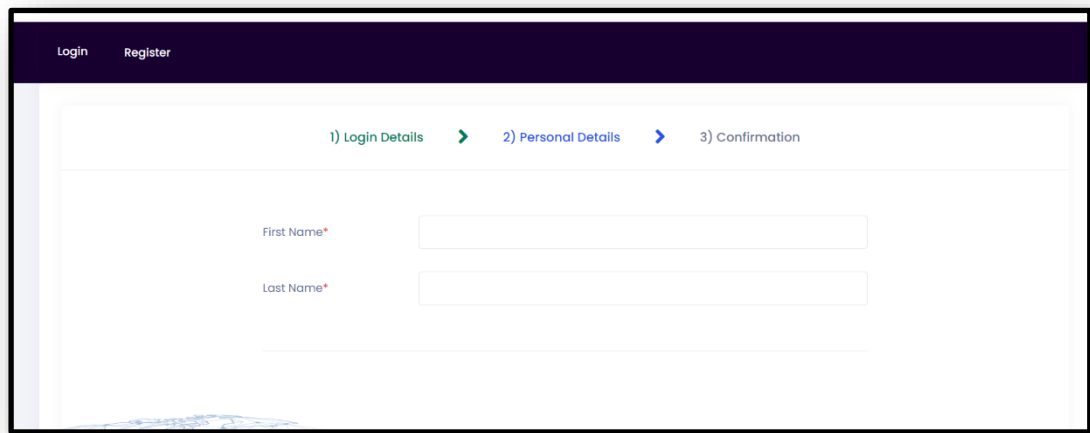
This registration process requires an email address, password setup and name.



Step	Action	Note
1	Enter your email address	This is the email address where the initial request was sent by the Learner
2	Enter a password	The system will prompt you if the password fails to meet the minimum requirements
3	Re-enter the password from step 2	
4	Click the Next button	Result: The system will navigate to the Personal Details screen

#### 2.2.2 Page two – Personal details

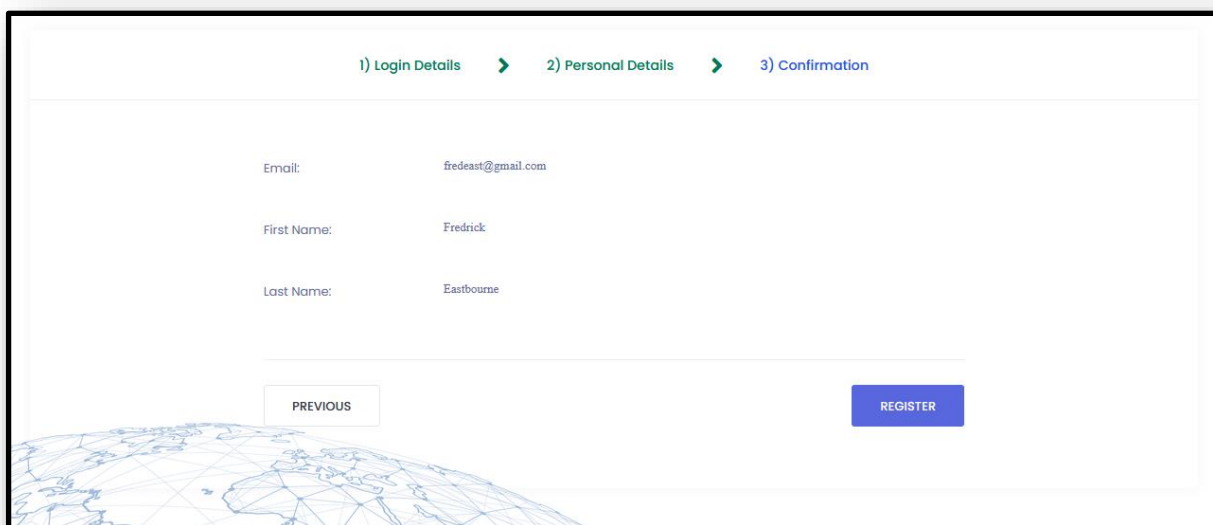
This page continues from page one.



Step	Action	Note
1	Enter your first name	This field is required
2	Enter your last name	This field is required
3	Click the Next button	Result: The system will navigate to the Confirmation screen

### 2.2.3 Page three – Confirmation

This page continues from page two.

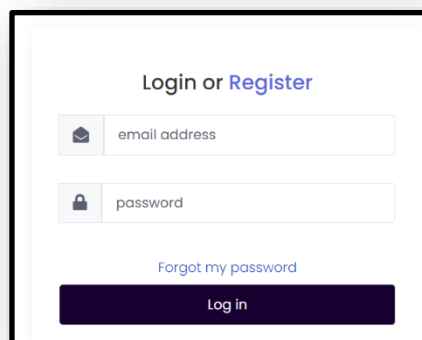


Step	Action	Note
1	Check to ensure that your details are correct	
2	Do you need to change anything? If Yes, <ul style="list-style-type: none"> <li>Click the Previous button</li> <li>Return to the previous procedure</li> </ul> If No, <ul style="list-style-type: none"> <li>Go to step 3</li> </ul>	Result: The Previous button will return you to the previous screen
3	Click the Register button	Result: A verification email is sent to the email address used for registration
4	Open you email browser	
5	Open the confirmation email then click on the link to verify the email address	Result: This will complete the registration process You will now be directed to log into the Verification portal

## 2.3 Logging into the Verification portal

### 2.3.1 Log in to the portal

Logging into the Verification portal requires the email address and password setup in the previous procedures.



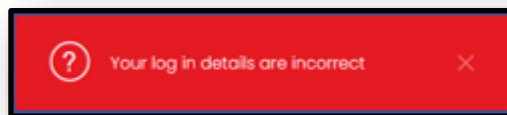
The screenshot shows a web form titled "Login or Register". It contains two input fields: "email address" with an envelope icon and "password" with a lock icon. Below the password field is a link that says "Forgot my password". At the bottom of the form is a dark blue button labeled "Log in".

Step	Action	Note
1	Enter your email address	This is the email address used for registration You can change this from the Profile screen, once you have logged

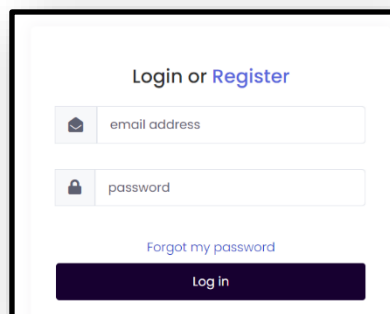
Step	Action	Note
2	Enter your password	This is the password created in the registration procedure You can change this from the Profile screen, once you have logged
3	Click the Log in button	Result: The system will navigate to the Dashboard main screen
4	Did you receive an error message? If Yes, <ul style="list-style-type: none"> <li>See 2.3.2 Receiving an error message</li> </ul> If No, <ul style="list-style-type: none"> <li>Continue to 3 Using the Dashboard</li> </ul>	

### 2.3.2 Receiving an error message

If you enter the wrong password 5 times or an admin user locks your account, then the following message will display:

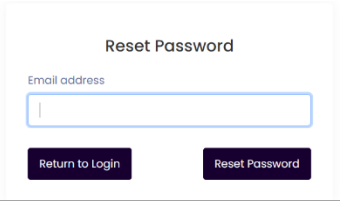
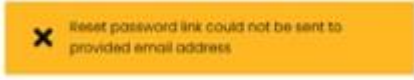


Use this procedure to unlock the account.



Step	Action	Note
1	Click the Forgot my password link	Result: This will display the Reset Password screen

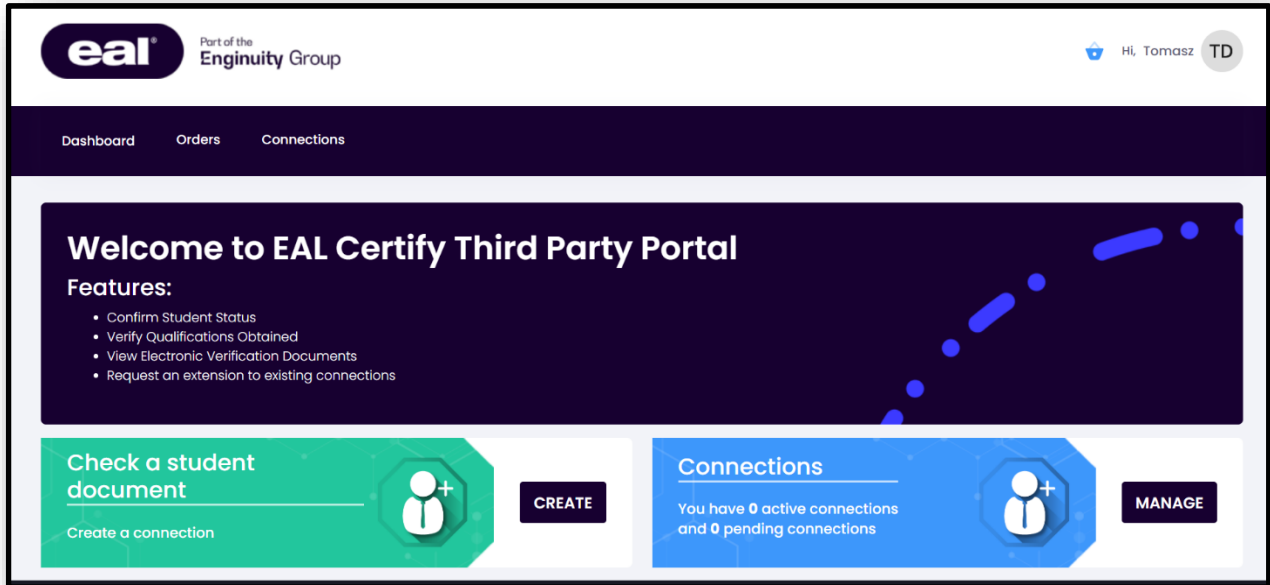


Step	Action	Note
		
2	Enter your email address in the Email field	
3	Click on the Reset password link	Result: The system will check to see if there is a registered user profile associated with that email address
4	Did you receive an error message? If Yes, <ul style="list-style-type: none"> <li>Go to step 5</li> </ul> If No, <ul style="list-style-type: none"> <li>Go to step 6</li> </ul>	If the email address is not registered with system, then you will receive the following message  
5	Return to the registration process and repeat the steps to register your email address Exit from this procedure	Repeat the procedure to register with the Verification portal
6	Enter your password	The system will prompt you if the password fails to meet the minimum requirements
7	Re-enter the password	Ensure to use the same password entered in step 6
8	Click on the Reset password link	Result: You will now be directed to log into the Verification portal

### 3 Using the Dashboard

#### 3.1 Introduction to the Dashboard

The Dashboard enables you to create and manage your connections, thereby giving you access to a digital view of a Learner’s qualification or document.

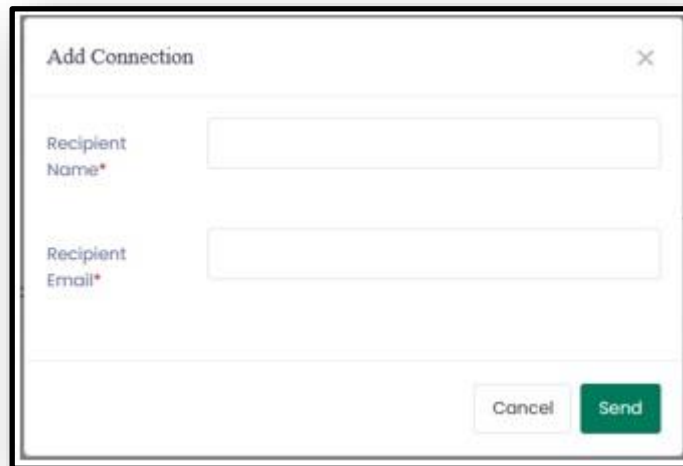


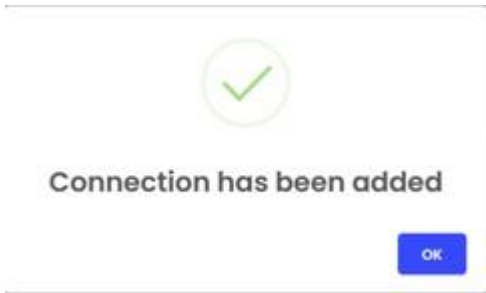
You send a connection request to the Learner requesting access to their documents. If the Learner is registered on the Learner portal, then as soon as they accept the request, you will be able to view their qualifications and documents. If the Learner is not registered on the portal, they will be required to register then accept the connection request.

Step	Action	Note
1	<p>Do you wish to create a new connection?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the Create button</li> <li>Go to procedure 3.2 Creating a new connection</li> </ul>	<p>Result: This will display the Add Connection screen</p>
2	<p>Do you wish to manage an existing connection?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the Manage button</li> <li>Go to procedure 3.3 Managing connections</li> </ul>	<p>Result: This will display the Manage connections screen</p>

### 3.2 Creating a new connection

Use the procedure below to create a new connection.



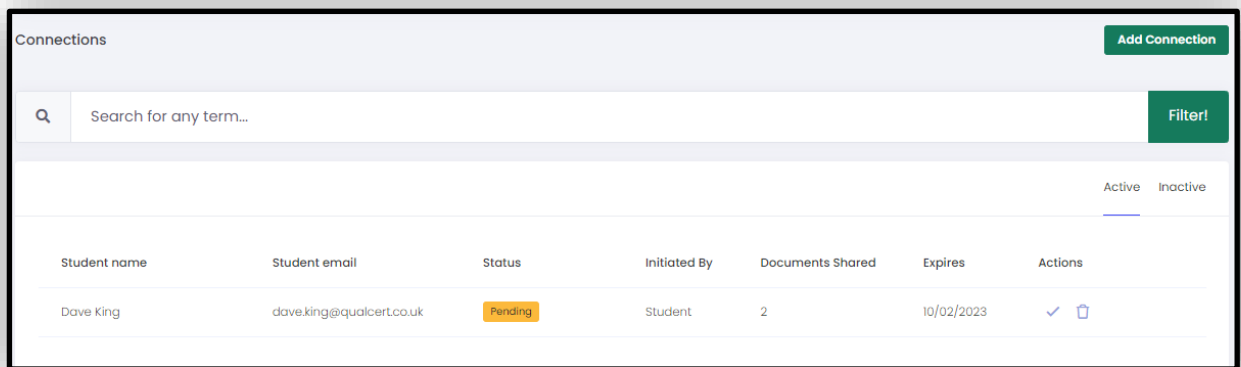
Step	Action	Note
1	Enter the Recipient name	This is the Learner whose records you wish to view
2	Enter the Recipient email address	This is the email address of the Learner
3	Click the Send button	<p>Result: A request is sent to the Learner and the following message will display</p>  <p>This request will then have a status of 'Pending' until the Learner accepts the connection request</p>
4	Continue with the next procedure once the Learner has accepted the request	

### 3.3 Managing connections

This Active tab screen lists all active and pending connection requests. From this screen, you can view the status of connections, manage connections, as well as create new connections.

#### 3.3.1 Accepting a new connection

When a Learner sends a connection request to you, it will appear in the Active window in a status of pending. When you receive a request, you can accept it or delete the connection request.



The connection status line shows:

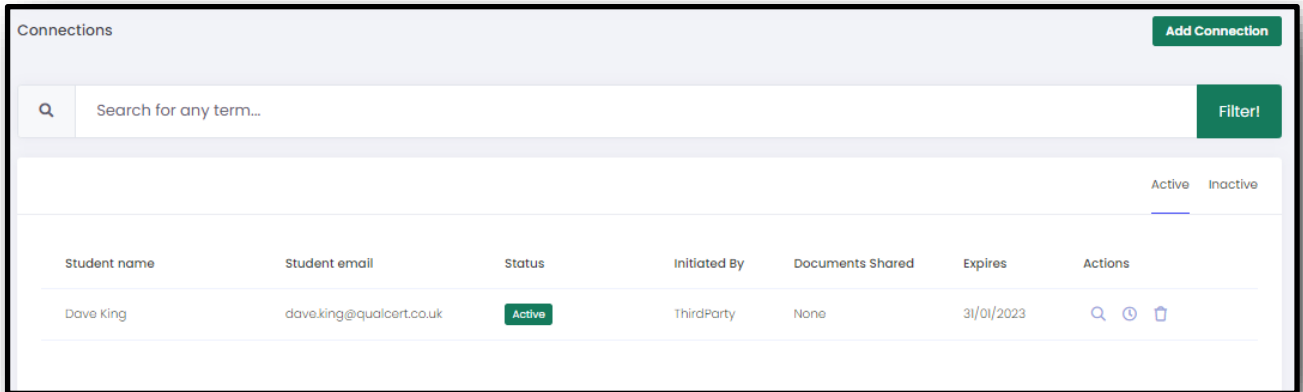
- Learner name
- Learner email address
- Status of the connection
- Who initiated the connection
- Number of documents shared by the Learner
- When the connection expires
- Available actions.

Use the procedure below to accept a connection.


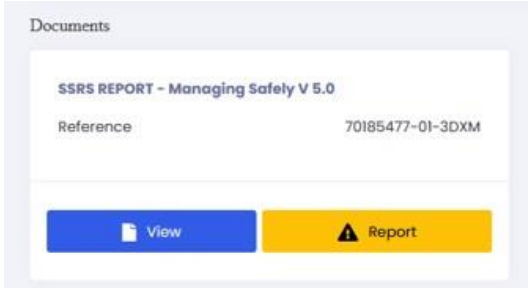
Step	Action	Note
1	Click the Tick button	This is located under the Actions heading  Result: This will display a Success confirmation and you will be able to view the Learner's qualifications
2	Click the OK button	Result: The screen will return to the Active window, with the status of the request as Active

### 3.3.2 Viewing a connection

Once the Learner accepts the request, it will show as active, as the image below shows.



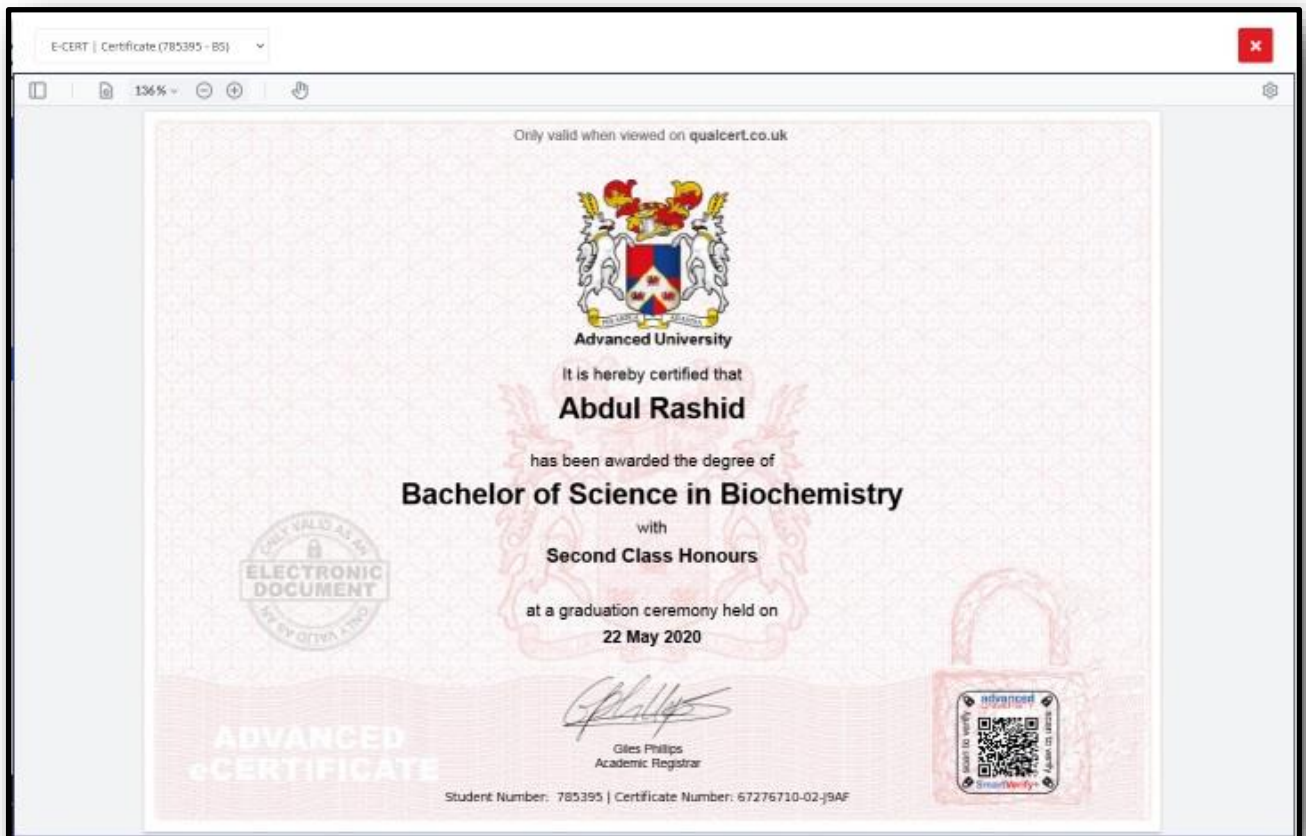
Use the procedure below to view a connection. Note, you can only do this once you or the Learner has accepted the request.

Step	Action	Note
1	Click the magnifying glass icon	<p>This is located under the Actions heading</p>  <p>Result: This will display a list of the qualifications including badges, that the Learner has shared with you, along with two options “View” and “Report”</p> 
2	<p>Do you wish to view the shared qualification?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the View button</li> <li>Go to procedure 3.3.3 Viewing a qualification or document</li> </ul>	<p>Result: This will display the qualification and associated documents that the Learner has shared with you</p> <p>Note, the e-PDF is generated by the system so may take a few minutes to load</p>

Step	Action	Note
3	<p>Do you wish to report concerns about the qualification?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the Report button</li> <li>Go to procedure 3.3.4 Reporting a qualification or document</li> </ul>	Result: This will open a form to report concerns about the qualification or document to the qualifying body









### 3.3.3 Viewing a qualification or document

Use the procedure below to view a qualification or document. The image below shows how this would look.



The top menu bar (shown just above the qualification/document image) provides several different options. Starting from the left:

Icon	Description
	This icon enables you to turn the side panel on or off

Icon	Description
	<p>This icon enables you to view various page options:</p> <ul style="list-style-type: none"> <li>• Page Transition Details whether each page of a multipage should be separated or treated as one document</li> <li>• Page Orientation Rotates the page clockwise or counter-clockwise by 90 degrees</li> <li>• Page Layout Dictates if a multi-document is displayed one page at a time, a double page or have the page shown by the cover page (in a book format)</li> </ul>
	This icon enables you to zoom in and out, to the percentage required
	These two icons zoom in and out
	This icon enables you to pan around the image
	<p>This icon displays the settings. Available options include:</p> <ul style="list-style-type: none"> <li> Display Full Screen; this shows the document in full-screen mode. Press the escape (Esc) key to exit</li> <li> Download the document to a local folder</li> <li> Print the document</li> </ul>

Step	Action	Note
1	Click the required icon from the top menu bar	Refer to the description of each icon above

### 3.3.4 Reporting a qualification or document

Use the procedure below to report concerns regarding a qualification or document.

Report Document Issue - Using the below message box you can report the issue you are having with the electronic document. This would send an email to the Registry Team at Advanced University ×

Someone will reach out to help rectify the problem

Issue reason

Issue Description

The following details will also included on the email.

Reporter's Name:	Tom Boardman
Reporter's Email:	tom.boardman@qualcert.co.uk
Student's Enrolment Number:	,785407
Qualification Title:	Bryan Habana - Bachelor of Science in Biochemistry

Step	Action	Note
1	Select the Issue reason from the drop-down list	Values include: <ul style="list-style-type: none"> <li>Report</li> </ul>
2	Enter a detailed reason for your question or concern	
3	Check the details in the form below	This will show: <ul style="list-style-type: none"> <li>Your name and email address</li> <li>Learner enrolment number</li> <li>Qualification title</li> </ul>
4	Click the Send button	Result: This will send the form as an email to the register's mailbox for the issue to be investigated


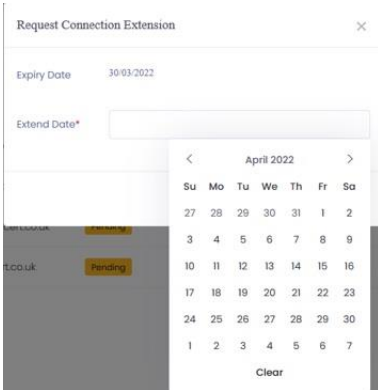
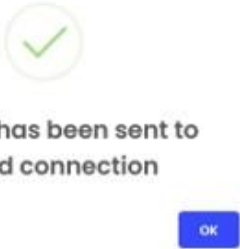
### 3.3.5 Extending the connection

All connection requests are created with a set expiry date. Use this procedure to extend this period.



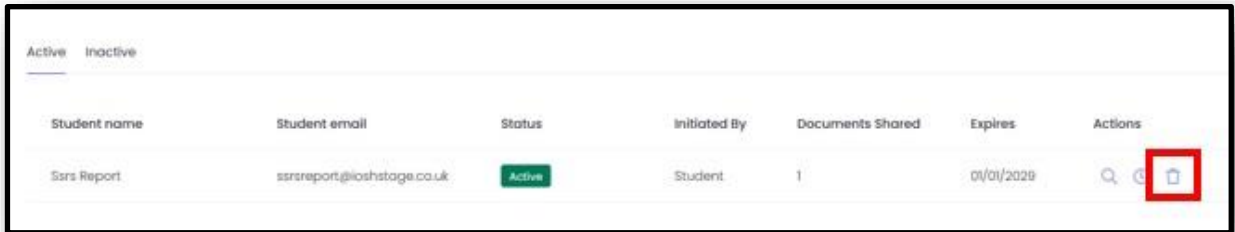
Note, the Learner is required to approve the extension, otherwise the connection will terminate at the end of the expiry period.


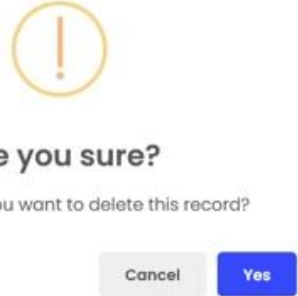
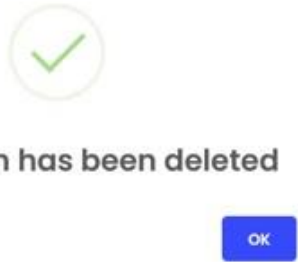
Student name	Student email	Status	Initiated By	Documents Shared	Expires	Actions
Ssrs Report	ssrsreport@ioshstage.co.uk	Active	Student	1	01/01/2029	

Step	Action	Note
1	Click the Clock icon	<p>This is located under the Actions heading</p>  <p>Result: This will display the Request Connection Extension</p>
2	Select the extension date	
3	Click the Save button	<p>Result: This will display the confirmation window</p> 
4	Click the OK button	<p>Result: This will send an extension request to the Learner</p> <p>After the Learner approves the new date, it become the new extension date going forward</p>

### 3.3.6 Cancelling the connection

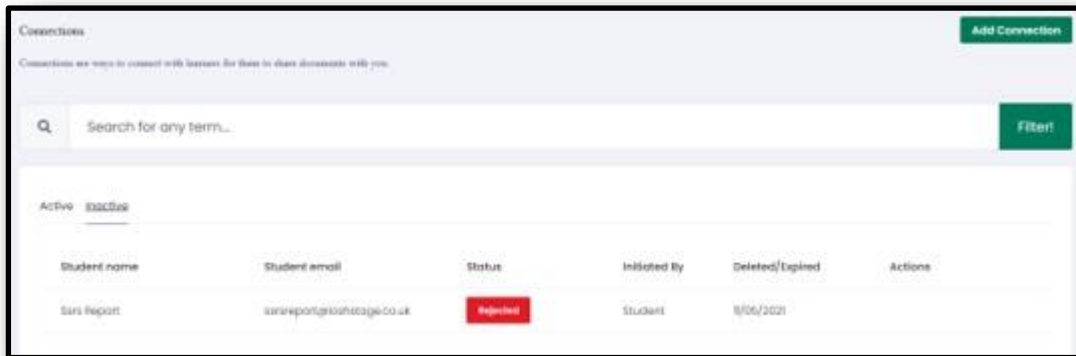
You can cancel a connection by following the procedure below.



Step	Action	Note
1	Click the Bin icon	<p>This is located under the Actions heading</p>  <p>Result: This will display the Confirmation screen</p> 
2	Click the Yes button	<p>Result: To confirm the termination</p> 
3	Click the OK Button	Result: The connection is terminated

### 3.3.7 Viewing inactive connections

This tab displays any connection which is expired, rejected, or cancelled. You will need to initiate any old connection from the start to view the Learner's documents again.

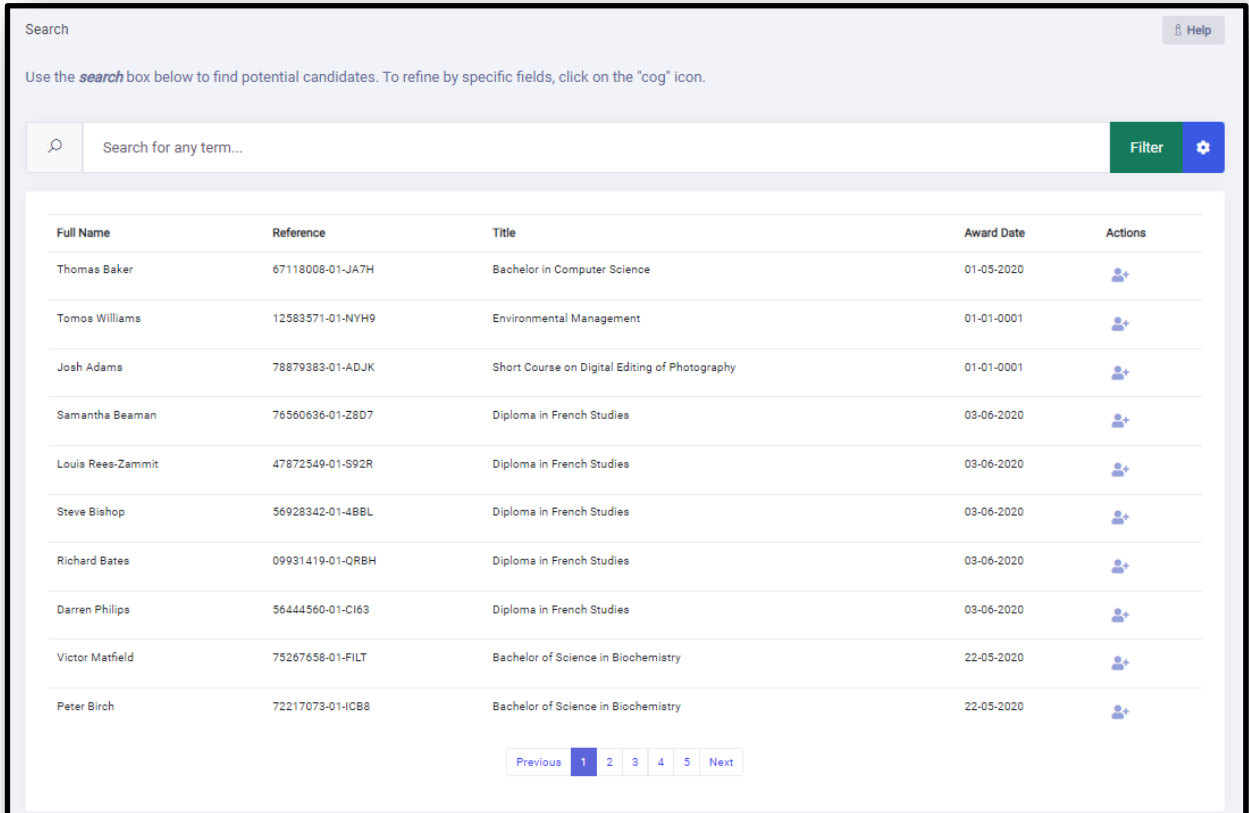


Step	Action	Note
1	Click the Inactive tab	This is displayed alongside the Active tab  Result: This will display a list (if applicable) of any inactive connection
2	Do you wish to view an old connection?  If Yes, <ul style="list-style-type: none"> <li>See procedure 3.3.5 Extending the connection</li> </ul> If No, <ul style="list-style-type: none"> <li>Exit this procedure</li> </ul>	You can renew the connection by requesting an extension

## 4 Using the Search function

### 4.1 Opening the Search screen

This Search function enables you to search for any Learner who has enabled their details to be made visible from the Search page. This allows you to quickly find any Learner (made searchable) and request a connection to view their documents.



Use this procedure to view the Search screen.

Step	Action	Note
1	Click the Search button	This is located on the Dashboard main screen
2	Go to the next procedure	

### 4.2 Viewing the Search results

The Search screen displays all Learners who have elected to make their details visible in the Search results. If a particular name doesn't appear in the list, then you will need to find their name and email by other means. This screen has three parts:

- Search function
- Advanced search function
- Search results.

#### 4.2.1 Using the Search function


Use this procedure to view use the search function.



Step	Action	Note
1	Enter the search text in the Search field	This could include, first name, last name, email address etc
2	Press the Enter key	Result: A list of Learners matching that search criteria will display in the search results panel

## 4.2.2 Using the Advanced search function



Use this procedure to view open the Advanced Search function. There are several fields to filter, as shown below.

Step	Action	Note
1	Click the Settings button next to Filter	This is located next to Filter  Result: This will display the Advanced Search screen
2	Enter details into the field you wish to filter: <ul style="list-style-type: none"> <li>• Reference number of the qualification or document</li> <li>• First name of the Learner</li> <li>• Last name of the Learner</li> <li>• Full name (both first and last) of the Learner</li> <li>• Email address</li> <li>• Title</li> <li>• Award date</li> </ul>	Result: The results will display in the panel below
3	Continue with the next procedure	

## 4.2.3 Adding a connection from the search results panel

Use this procedure to connect to the Learner via the filter results.

Email	Title	Award Date	Actions
9658742@gmail.com		01-12-2022	
9658742@gmail.com		03-12-2022	<b>Add Connection</b>

Step	Action	Note
1	Click the Connection icon	<p>This is located under Actions</p>  <p>Result: This will display the Add Connection screen</p> 
2	Confirm that this is the Learner whose documents you wish to view	
3	<p>Do you wish to connect to this Learner?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the Send button</li> <li>Continue with procedure 3.3 Managing connections</li> </ul> <p>If No,</p> <ul style="list-style-type: none"> <li>Click the Cancel button</li> <li>Return to the previous procedure to find the correct Learner</li> </ul>	<p>Result: A request is sent to the Learner and the following message will display</p>

## 5 Using Profiles

### 5.1 What is a Profile?

All users registered on the Verification portal have a profile, which provides information about the person. You can view your own profile or that of a Learner you are connected to.

The Profile screen shows:

- Photo (where supplied)
- Personal details
- Additional Contact information
- Phone numbers
- Email addresses
- Social media
- Addresses
- Change password (your profile only).


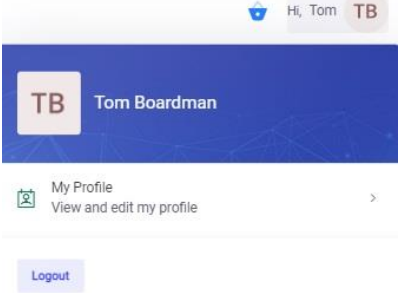
The screenshot shows a 'Profile' page for 'Tom Boardman'. On the left, there is a profile card with a circular avatar containing the initials 'TB' and a pencil icon for editing. Below the name 'Tom Boardman', there are four menu items: 'Personal Details' (highlighted in blue), 'Additional Contact Information', 'Addresses', and 'Change Password'. The main area is titled 'Personal Details' and contains several input fields: 'First Name\*' with 'Tom', 'Middle name' (empty), 'Last Name\*' with 'Boardman', 'User name\*' with 'tboardman', 'Phone number' (empty), and 'Email address\*' with 'tom.boardman@qualcert.co.uk'. A green 'Save' button with a checkmark is located at the bottom right of the form.



## 5.2 Where can I find my Profile?

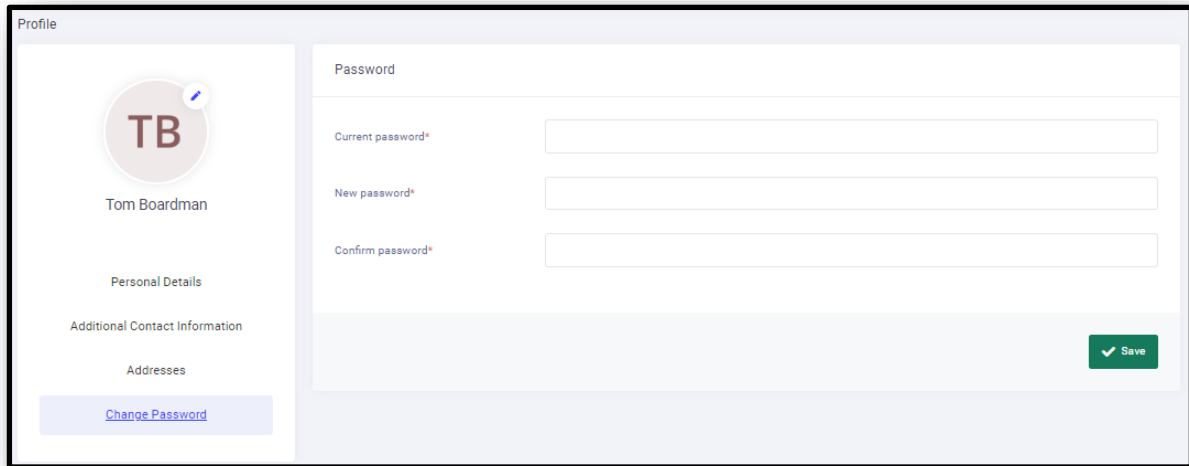
### 5.2.1 View or edit your profile

Use this procedure to view or edit your profile.

Step	Action	Note
1	Select your name	<p>This is located at the top right-hand corner of the screen</p>  <p>Result: This will open your profile and logout option page</p> 
2	Click on View and edit my profile link	Result: This will open your profile screen
3	Select the option to view or edit: <ul style="list-style-type: none"> <li>Your personal details</li> <li>Additional Contact information</li> <li>Addresses</li> <li>Change your password</li> </ul>	

### 5.2.2 Change your password


Use this procedure to change your password.



Step	Action	Note
1	Click the Change Password link from your profile screen	Result: This will display the Change Password screen
2	Enter your current password	This is a required field
3	Enter your new password	The system will prompt you if the password fails to meet the minimum requirements
4	Re-enter the new password	Ensure to use the same password entered in step 3
5	Click the Save button	Result: This will save your new password

### 5.2.3 Logging out of the system

Use this procedure to log out of the system.

Step	Action	Note
1	Click the Logout button	<p>Result: This is located at the bottom of the Profile screen</p>  <p>You will be logged out of the system</p>