



Part of the  
**Enginuity** Group



# Certify Centre Portal

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## User Guide

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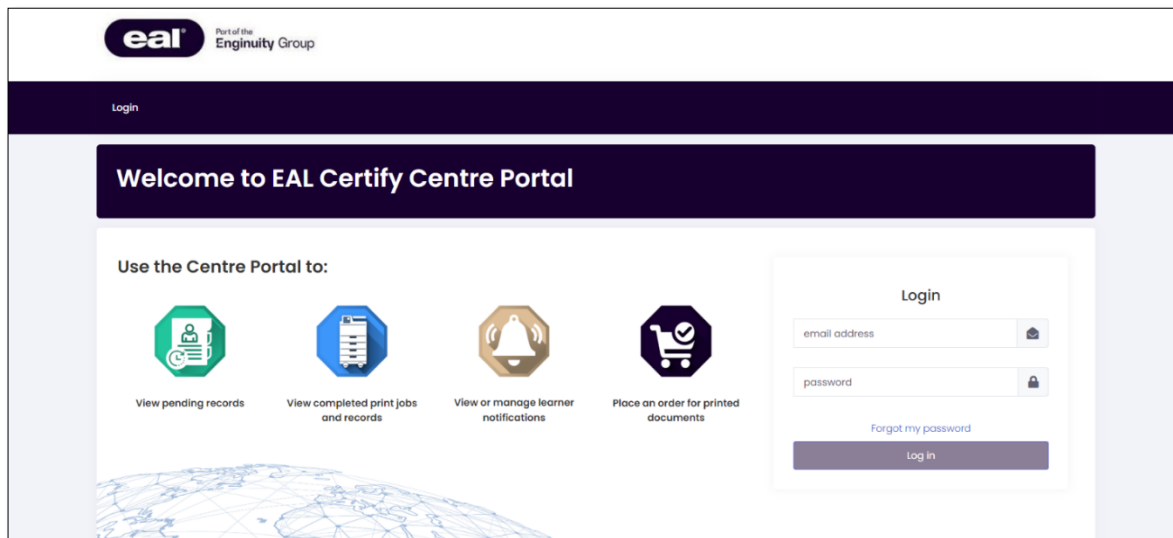
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# 1. User Guide for the EAL Certify Centre Portal

## 1.1 Introduction to Certify.

Welcome to the User Guide for the EAL Certify Centre Portal. This guide is designed to provide comprehensive instructions on navigating and utilising the features of the Centre portal within Certify.

The Certify portal offers a secure online platform for Recognised EAL Centres to access and manage e-Certificates for learners efficiently. Through this portal, centres can conveniently view and download e-Certificates, streamlining administrative processes and enhancing accessibility for learners.



## 2. Access and login

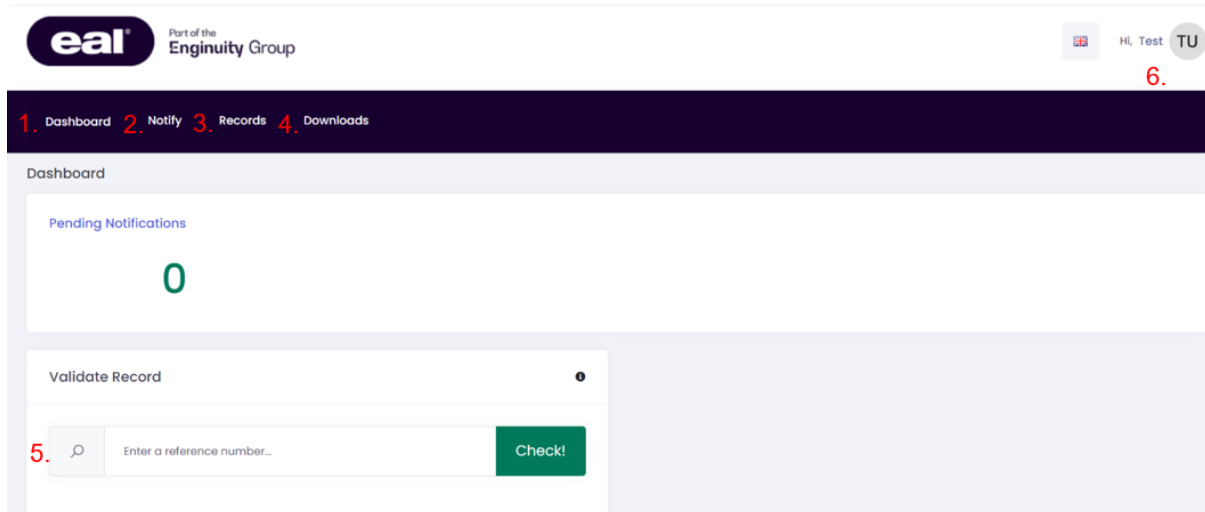
### 2.1 Getting Started

To access Certify, you must have permission from Online Services to view e-Certificates. With this permission, you'll notice an additional tile called 'Certify' within the [EAL Connect](#) portal. However, if you do not have access to this feature, please get in touch with your Centre Coordinator, who will be able to grant you the necessary permission.

## 3. Navigating the Dashboard

### 3.1 Introduction to the Dashboard

The Dashboard is the main page of the Centre portal. It enables you to view and manage records for your Learners. The table below explains this screen.



Key	Description	Description
1	Dashboard	View the number of pending notifications or validate a learner record.
2	Notify	Enable you to notify learners that their e-Certificate(s) are available to download.
3	Records	View learner records or your latest Centre Approval certificate.
4	Downloads	View queued downloads or re-download previous batches of e-certificates.
5	Validate Record	Validate a learner record using their unique reference number
6	Profile	View your details. Please note that any changes made here will not take effect. For updates, please contact your centre coordinator, who will make them via online services.

## 4. Notify

### 4.1 Notifying learners to access their e-Certificate(s).

When an e-certificate is ready for download, you can notify your learner, who will receive an email inviting them to sign up for an account on Certify and view their certificate.

To notify a learner, navigate to the 'Notify' tab.



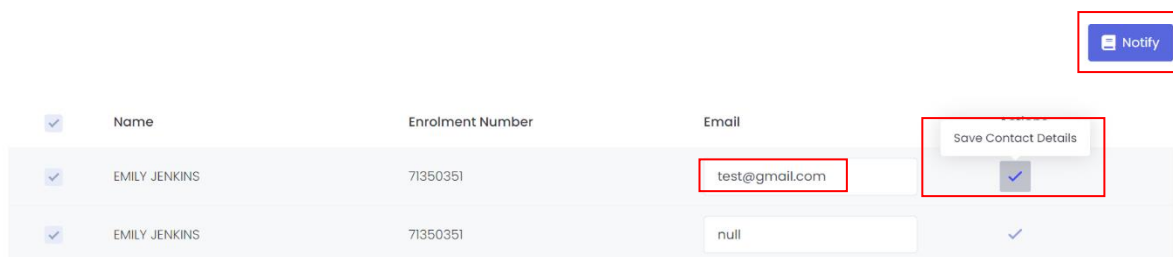
Within the 'Notify' section, you can search for any learner using their name or enrolment number (candidate number).



After entering your search term, press 'return' on your keyboard or click the 'filter!' button. The search will return results matching your specified search term.

Learners who do not have an email address in the system will display 'null' in the email address field.

You'll need to enter their email address manually. This only needs to be done once per record. Once the email address is updated for one record with a specific candidate number, it will automatically update all records with the same candidate number.



Once you've entered the learner's email address, select the tick box under actions to save the email address. You'll receive an on-screen prompt confirming that the details have been saved.



### Saved successfully

Successfully updated student contact details



When you're ready to notify the learner, select the check box next to the record on the left-hand side and press 'Notify'. The learner will receive an invite to sign up and view their e-Certificate.

<input checked="" type="checkbox"/>	Name	Enrolment Number	Email	
<input checked="" type="checkbox"/>	EMILY JENKINS	71350351	test@gmail.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	EMILY JENKINS	71350351	null	<input checked="" type="checkbox"/>

Save Contact Details

Notify

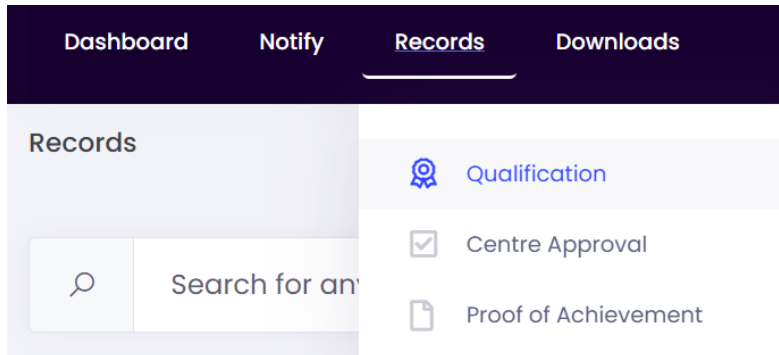
## 5. Records

### 5.1 Viewing and downloading learner records.

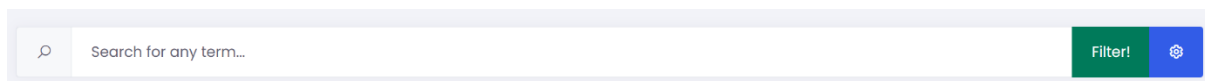
The 'Records' tab lets you view and download learner records and access your Centre Approval Certificate.

Navigate to the tab and click on it to reveal additional options.

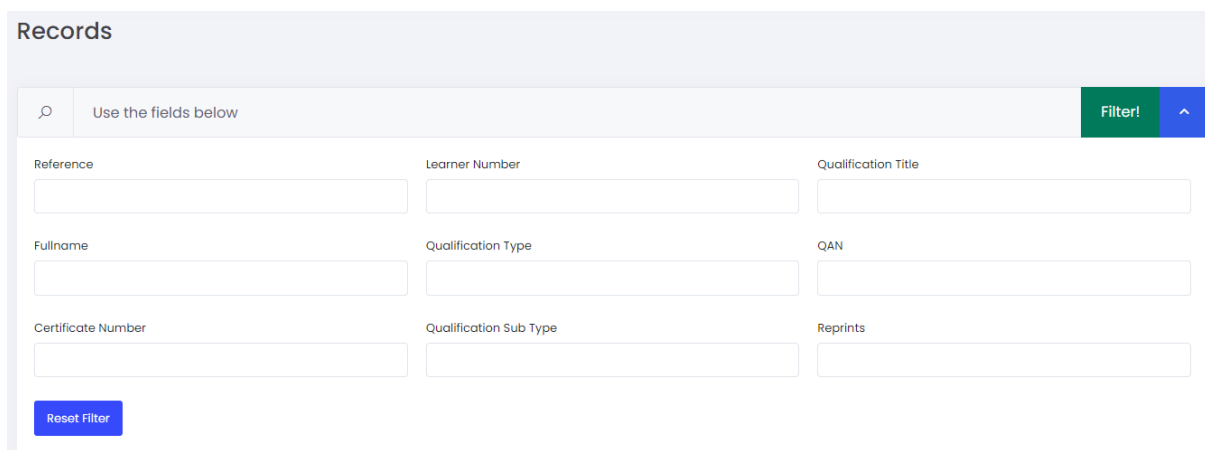
Start by selecting 'Qualification' to view the latest e-Certificate records for your learners.



Within the 'Records' section, you can search for any learner using the search filter. Enter any criteria: Reference, Learner Number, Qualification Title, Full Name, Qualification Type, or QAN (Qualification Application Number).

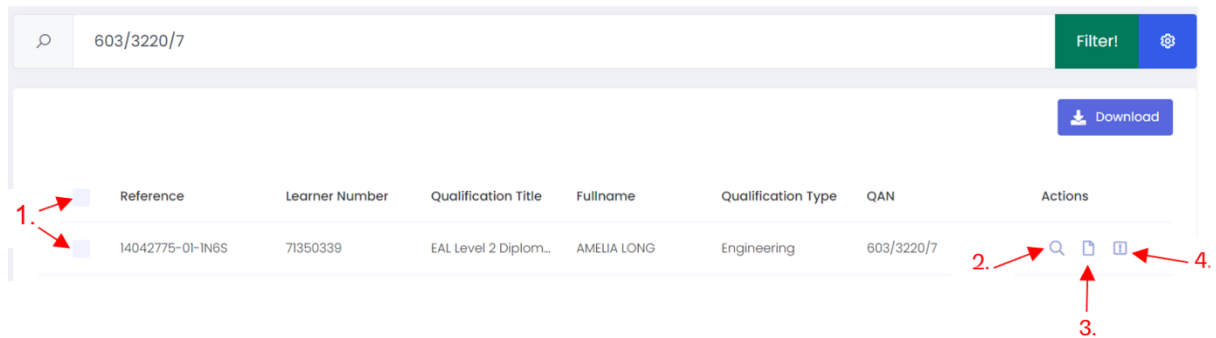


Selecting the setting cog will reveal additional search filters.





After entering your search term or including a filter, select 'return' on your keyboard or click the 'filter!' button. The search will then return results matching your specified criteria.



From here, you can download the learner certificate, view it, check the learner record or report an issue.

Click on the relevant option to proceed with your desired action. The table below explains the screen (above) and the options available.

Key	Description	Description
1	Download e-Certificate(s)	Select to download the learner certificate in a secure PDF format.
2	View Certificate(s)	Select to view the learner e-Certificate
3	Check Learner Profile	Select to view a summary of the learner record.
4	Report an Issue	Select to report an issue with the e-Certificate.

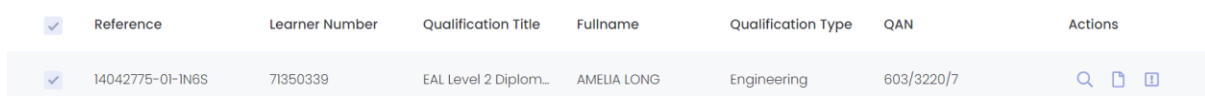
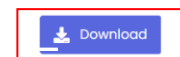
## 5.2 Selecting learner certificates to download

In the search results, select the checkbox against the learner records you want to download the certificates for.

**Tip:** To download e-Certificates for all learners in the search criteria, select the icon above the highlighted field below. This action will select all learner records.



Click the ' Download ' button once you have selected all learner records.



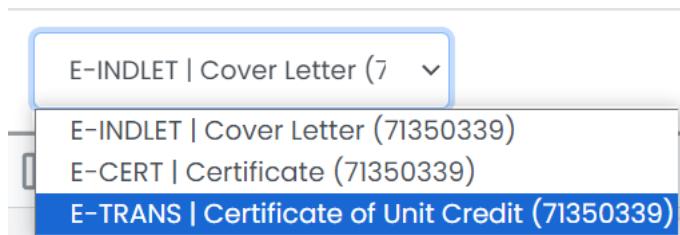
Your download will queue. Skip to section 6. 'Downloads' in this document for step-by-step instructions on downloading the .ZIP file to your desktop.

### 5.3 Viewing learner certificates

Select the icon highlighted below to view a learner certificate or cover letter on-screen.

Reference	Learner Number	Qualification Title	Fullname	Qualification Type	QAN	Act
14042775-01-IN6S	71350339	EAL Level 2 Diplom...	AMELIA LONG	Engineering	603/3220/7	

Once selected, the learner document will automatically appear, defaulting to the learner's cover letter. Depending on what has been published to the learner, you can select the drop-down list in the top left-hand corner to switch documents.



Select the red X icon in the top right-hand corner to return to the search results.



### 5.4 Checking the Learner Profile

Select the icon highlighted below to view a summary of the learner record and an overview of the issue e-Certificates.

Reference	Learner Number	Qualification Title	Fullname	Qualification Type	QAN	Act
14042775-01-IN6S	71350339	EAL Level 2 Diplom...	AMELIA LONG	Engineering	603/3220/7	

### 5.5 Report an Issue

If you notice an issue with a learner certificate, you can report it to EAL by selecting the following icon against the learner record:

Reference	Learner Number	Qualification Title	Fullname	Qualification Type	QAN	Act
14042775-01-IN6S	71350339	EAL Level 2 Diplom...	AMELIA LONG	Engineering	603/3220/7	

Once selected, the following window will appear. Please choose the reason for the issue from the dropdown list and enter a description. Once you have completed the appropriate fields, please click 'Send'. The EAL Customer Experience team will then contact you with the next steps.

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 Customer Services Team at EAL ✕

To report an issue on the document that you have viewed, please select one of the predetermined reasons below and provide as much information as you can so in order for us to deal with the issue as quickly as possible

Issue reason

Issue Description

The following details will also be included in the email

<b>Reporter's Name:</b>	Test User
<b>Reporter's Email:</b>	
<b>Student's Enrolment Number:</b>	
<b>Qualification Title:</b>	

Send

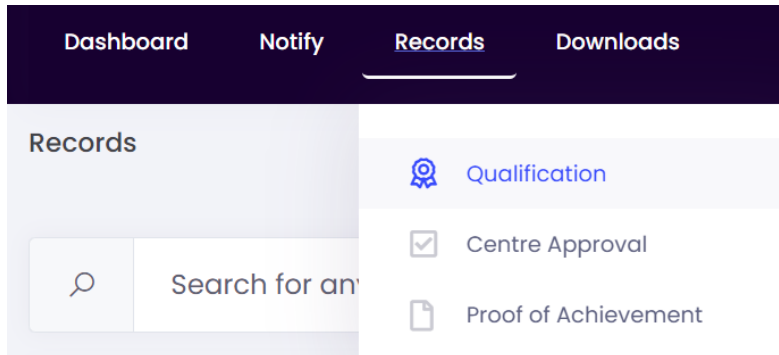
## 6. Downloads

### 6.1 Downloading the learner e-Certificate(s) to your desktop

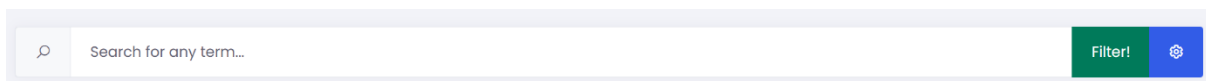
When an e-Certificate is ready for download, you can download it to a ZIP folder on your desktop.

To begin, navigate to the 'Records' tab and click on it to reveal additional options.

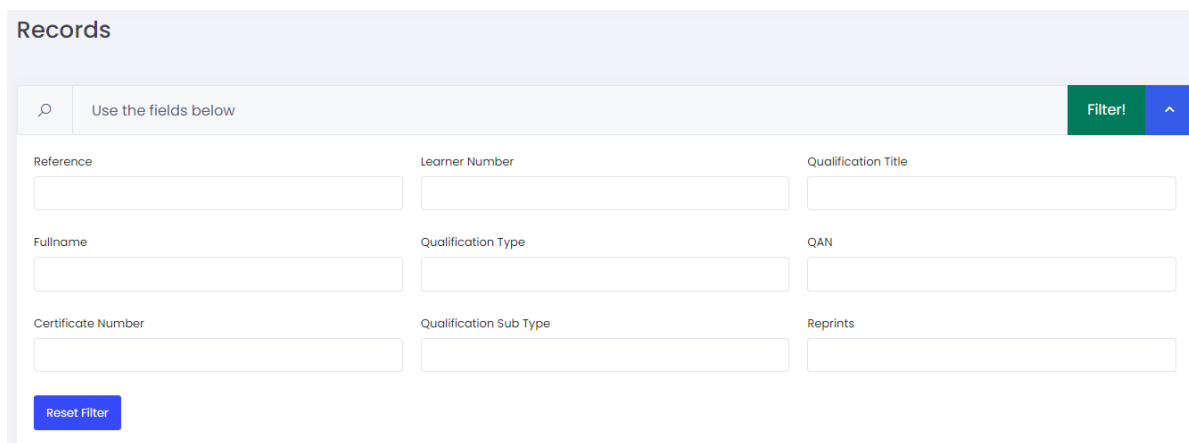
Start by selecting 'Qualification' to view any e-Certificate records for your learners.



Within the 'Records' section, you can search for any learner using the search filter. Enter any criteria: Reference, Learner Number, Qualification Title, Full Name, Qualification Type, or QAN (Qualification Application Number).



Selecting the settings cog will also reveal additional search filters.



After entering your search criteria, press 'return' on your keyboard or click the 'filter!' button. The search will return results matching your specified criteria.

Once the search results are displayed, select the tick box on the left-hand side of the record(s) you wish to download.

Download

<input type="checkbox"/>	Reference	Learner Number	Qualification Title	Fullname	Qualification Type	QAN	Actions
<input checked="" type="checkbox"/>	80066501-01-MJ4T	71353223	EAL Level 2 NVQ Diplo...	501/0147/XENFI TEST	Engineering	501/0147/x	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	14042775-01-IN6S	71350339	EAL Level 2 Diploma L.	AMELIA LONG	Engineering	603/3220/7	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	27301022-01-FGSP	70877739	EAL Level 2 Diploma L.	CHRIS TEST	Engineering	601/3375/2	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Press 'Download' in the top right-hand corner to download the selected records. The following screen will allow you to provide a name for the download.

**Export Documents** ✕

---

Download Name

Test

Description

Engineering

- Certificate
- Cover Letter
- Certificate of Unit Credit

Cancel
Download

The table below explains the 'Export Documents' options:

Key	Description	Description
1	Download Name	This will be the name of the ZIP file when you download the certificates.
2	Description	This is the name on the 'Downloads' screen to help you identify the file.
3	Certificate	The front cover of the certificate. If the learner has achieved a full claim, this will be available for download.
4	Cover Letter	A letter congratulating the learner on their achievements.
5	Certificate of unit credit	The unit page for each learner's certificate.

We advise selecting all the options above to ensure all appropriate documents are downloaded.

Once you have completed the above steps, select 'Download'.

You will then see the following onscreen message confirming that your download request has been received. You will be notified by email when the download is ready for you to access.



### Download is being processed!

Your download request has been received and you will be notified when the download is ready for you to access



Once the download is ready, navigate to the 'Downloads' tab to download the file to your desktop.

Identify the download by name and select the download icon.

Downloads					
Name	Description	Type	Status	ExpirationTime	Actions
Test	Engineering	Documents	Completed	25/09/2024	

Download Files

Download Files (Icon):



Following the onscreen prompts to save the file.

If you encounter any issues, such as the download failing, click the '!' icon under actions to report the problem. In the provided box, enter a description of the issue and press 'Send.' Our Customer Experience team will investigate and get back to you as soon as possible.

Report an issue

Report Issue (Icon):



## 7. Validate Records

### 7.1 Verifying a learner record using the unique reference number.

A certificate reference number can be used to verify whether a certificate is valid. This feature is available on the 'Dashboard'

To validate a learner record, navigate to the 'Dashboard' tab.

Then enter a reference number in the 'Enter a reference number...' then select 'Check!'

Validate Record i

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You will receive an onscreen confirmation to confirm whether the record is valid.

✓

This document is valid and was issued by EAL to on  
06 Aug 2024

To view further details relating to the certificate, select either 'Details' for an onscreen breakdown of the learner and certificate or 'Preview' to view the certificate.

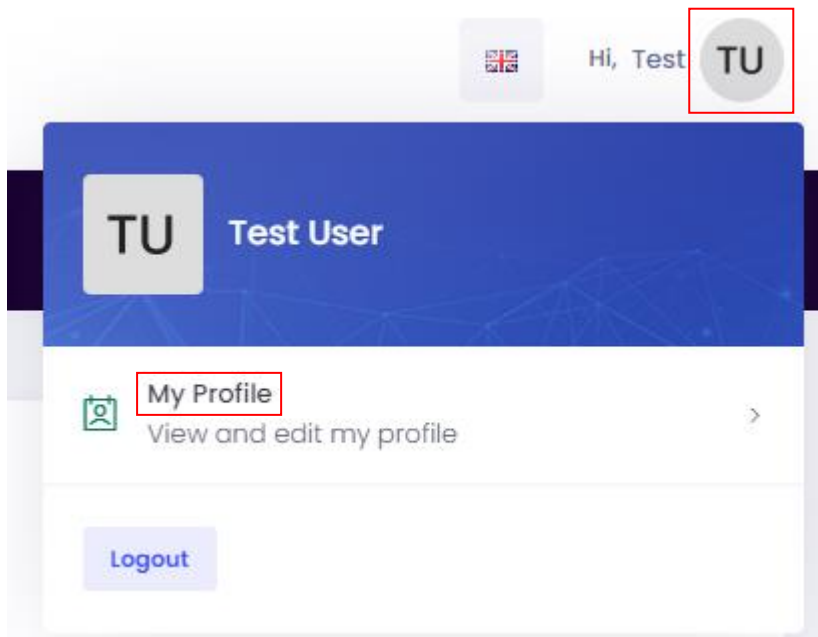
Please note that this functionality works for learners linked to your centre only.

## 8. Profile

### 8.1 Viewing your details

The 'Profile' icon allows you to view the personal details associated with your account. However, it's important to note that any changes made here will not be reflected in your Online Services account. If you need to update your personal details, please contact your Centre Coordinator, who will need to make these updates on your behalf.

You can access your profile from any page by selecting your initial in the top right-hand corner and then choosing 'My Profile'.



If you need to update your password, please do so through EAL Connect, which uses the same password with single sign-on. Any changes to the password here will not take effect.



## 9. Support and Additional Resources

### 9.1 For further support and additional information

If you require any assistance or have questions regarding the use of EAL Certify, please contact the Customer Experience team at:

- **Email:** [Customer.Experience@eal.org.uk](mailto:Customer.Experience@eal.org.uk)
- **Phone:** 01923 652400
- **Live Chat:** Log in to EAL Connect and select the chat bubble in the bottom right-hand corner.

The Customer Experience team is available Monday to Friday, 8:00 AM to 5:00 PM.

For further guidance and FAQs, you can log in to the [EAL Connect Knowledge Hub](#), where you will find additional resources and frequently asked questions.