



Part of the  
**Enginuity** Group



**Certify**

**Learner Portal**

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**User Guide**

## Document Information

### Version History

Date	Version	Author	Description of change
19/8/21	1.4	DH	Review
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13/10/21	1.4	DH	Added reactivation
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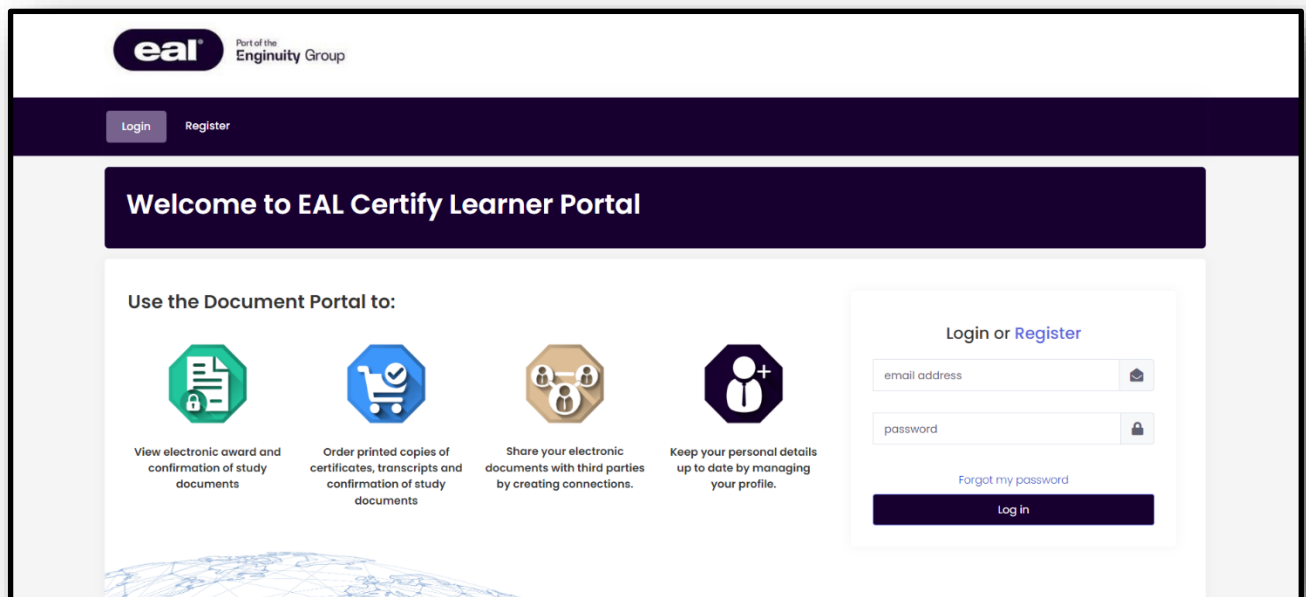
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# 1 User Guide for the Learner Portal

## 1.1 Introduction

This guide provides instructions on how to use the Learner portal of the Digital Certificates Web software application from Certify.

It is intended for any Learner wishing to view their electronic qualifications and status documents, and share with third parties (prospective employers, other educational institutions etc).



## 1.2 What is the Learner portal for Certify?

The Learner portal provides access to electronic versions of your qualification and status documents. You can:

- View electronic versions (in PDF format) of qualification and status documents which can be downloaded or printed a limited number of times
- Share electronic certificates with third parties by creating connections to them
- Keep personal details up to date by managing your profile.

## 2 Getting started

### 2.1 Introduction

Getting started is very easy. It requires you to register with the Learner 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. These are the details that are registered with your Awarding Body (learning institution).

The screenshot shows a registration form with three main input fields and a 'NEXT' button. At the top, there are three steps: '1) Login Details', '2) Personal Details', and '3) Confirmation', with blue arrows pointing right. The 'Email\*' field contains the text 'jane.smith@addancedlearn.co.uk'. The 'Password\*' field contains six dots. The 'Confirm password\*' field also contains six dots. A blue 'NEXT' button is located at the bottom right of the form area.

Note: some of the steps below may change depending on your Awarding Body.

Step	Action	Note
1	Enter your email address	This is your email address
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 continues from page one.

1) Login Details > 2) Personal Details > 3) Confirmation

First Name\*

Last Name\*

Enrolment Number\*

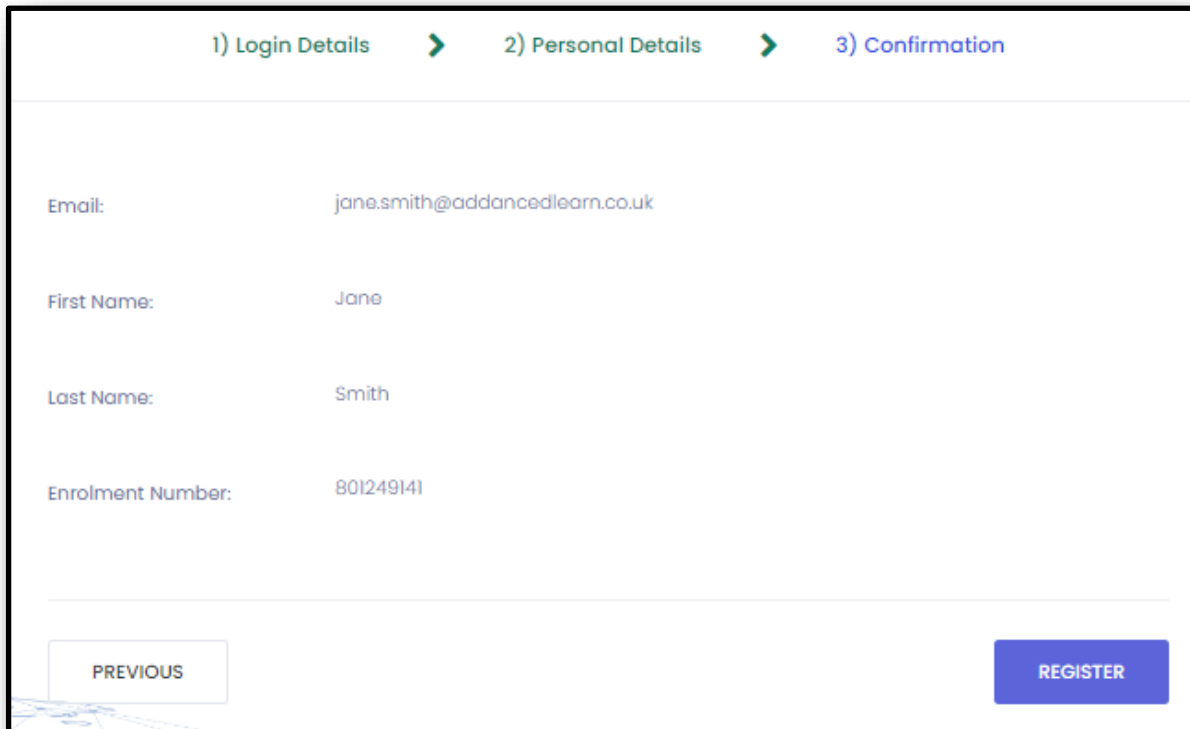
PREVIOUS

NEXT

Step	Action	Note
1	Enter your First name	This field is required
2	Enter your Last name	This field is required
3	Enter your Enrolment number	This field is required
4	Click the Next button	Result: The system will navigate to the Confirmation screen

### 2.2.3 Page three – Confirmation

This continues from page two.



1) Login Details > 2) Personal Details > 3) Confirmation

Email: jane.smith@addancedlearn.co.uk

First Name: Jane

Last Name: Smith

Enrolment Number: 801249141

PREVIOUS REGISTER

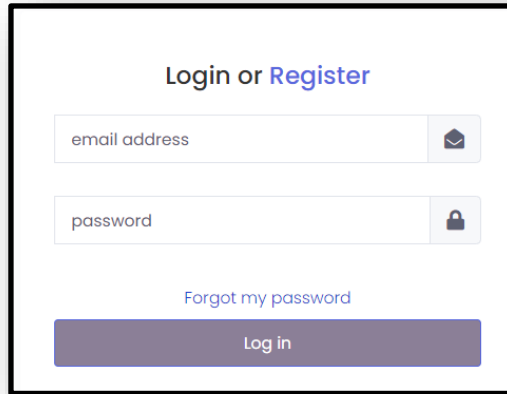
Step	Action	Note
1	Check to ensure that your details are correct	
2	Do you need to change anything? If Yes, <ul style="list-style-type: none"> <li>Click the Previous button</li> <li>Return to the previous procedure</li> </ul> If No, <ul style="list-style-type: none"> <li>Go to step 3</li> </ul>	Result: 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 Learner portal



## 2.3 Logging into the Learner portal

### 2.3.1 Log in to the portal

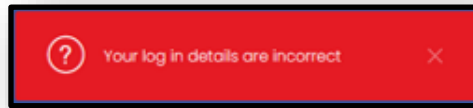
Logging into the Learner portal requires the email address and password setup in the previous procedures.



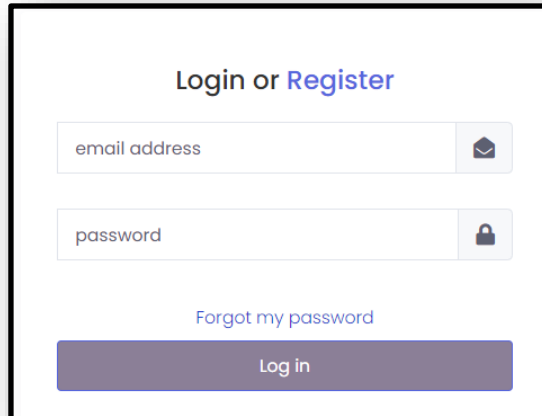
Step	Action	Note
1	Enter your email address	This is the email address used for registration You can change this from the Profile screen, once you have logged
2	Enter your password	This is the password created in the registration procedure You can change this from the Profile screen, once you have logged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

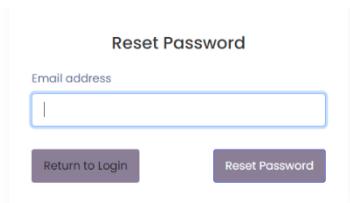

### 2.3.2 Receiving an error message

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 
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	Repeat the procedure to register with the Learner portal

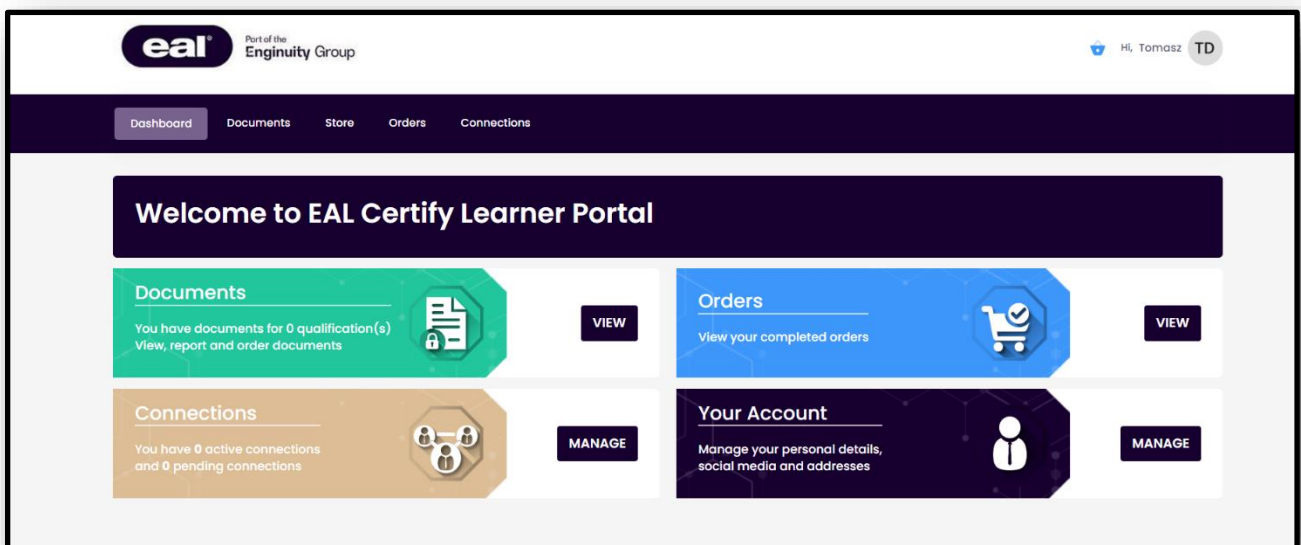
Step	Action	Note
	Exit from this procedure	
6	Enter your password	The system will prompt you if the password fails to meet the minimum requirements
7	Re-enter the password	Ensure to use the same password entered in step 6
8	Click on the Reset Password link	Result: You will now be directed to log into the Learner portal

### 3 Using the Dashboard

#### 3.1 Introduction to the Dashboard

The Dashboard enables you to:

1. View your electronic copies of your qualification(s) and documents
2. Manage your connections with third parties
3. Request a printed copy of your qualification(s)
4. Manage your profile.



Use this procedure to select the required option.

Step	Action	Note
1	<p>Do you wish to view your documents?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>• Click the View button</li> <li>• Go to procedure 4 Viewing qualifications and badges</li> </ul>	<p>Result: This will display the Documents and Badges screen</p>
2	<p>Do you wish to manage connections to third parties?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>• Click the Manage button</li> <li>• Go to procedure 6 Managing connections</li> </ul>	<p>Result: This will display the Manage connections screen</p>

Step	Action	Note
3	<p>Do you wish to view your existing orders?</p> <p>If Yes,</p> <ul style="list-style-type: none"><li>• Click the Order button</li><li>• Go to procedure 5 Creating and viewing orders</li></ul>	<p>Result: This will display the Orders screen</p> <p>Note: To order a copy of your qualification, see procedure 4.2 Viewing your qualification</p>
4	<p>Do you wish to view your profile?</p> <p>If Yes,</p> <ul style="list-style-type: none"><li>• Click the Manage button (alongside Profile)</li><li>• Go to procedure 7 Using profiles</li></ul>	<p>Result: This will display the Profile screen</p> <p>Note: To opt into the third party search function, 7.2.3 Opting in with the third party search function</p>

## 4 Viewing qualifications and badges

### 4.1 Introduction

This screen will display your qualification(s) and has two components:

1. Documents
2. Badges (if applicable).

The badge depends on your qualification, as some qualifications come with badges and others do not.

**Documents and Badges**

**Documents**

Document Title	Reference	Award Date	Course Name
Dave King - AST Learner Portal Trainer - Workbook	87365060-01-W34G	2020-05-01	AST Learner Portal Trainer - Workbook
Dave King - AST Third Party Portal Trainer - Workbook	46013414-01-YP9L	2020-05-01	AST Third Party Portal Trainer - Workbook
Dave King - Functional Skills Qualification in English Level 1	10643835-01-3DCE	2017-03-27	Functional Skills Qualification in English Level 1

**Badges**

Badge Title	Reference	Issue Date
Advanced Awarding Associateship in British Sign Language (BSL) Issued to: Dave King On: October 2021	99792715-01-2109	October 2021
Advanced Awarding European Computer Driving License Issued to: Dave King On: July 2021	37229949-01-PDS5	July 2021

Use this procedure to select the required option.

Step	Action	Note
1	Do you wish to view your qualification? If Yes, <ul style="list-style-type: none"> <li>Go to procedure 4.2 Viewing your qualification</li> </ul>	This includes instructions on how to order a printed copy
2	Do you wish to view your badge? If Yes, <ul style="list-style-type: none"> <li>Go to procedure 4.3 Viewing badges</li> </ul>	

## 4.2 Viewing your qualification

Once you are certified, you can view and download a digital PDF copy of your qualification. There is a set limit to the number of times you can download your PDFs, which is determined by your Awarding Body.

You can also order a printed copy of your qualification which has an associated cost.

### 4.2.1 Cards

Qualifications are displayed within cards and each card has three buttons:

- View** This button enables you to view the electronic qualification and all associated documents (certificates and letters)
- Report** This button enables you to report a concern regarding the qualification
- Order** This button enables you to order additional printed copies of your qualification, at cost.

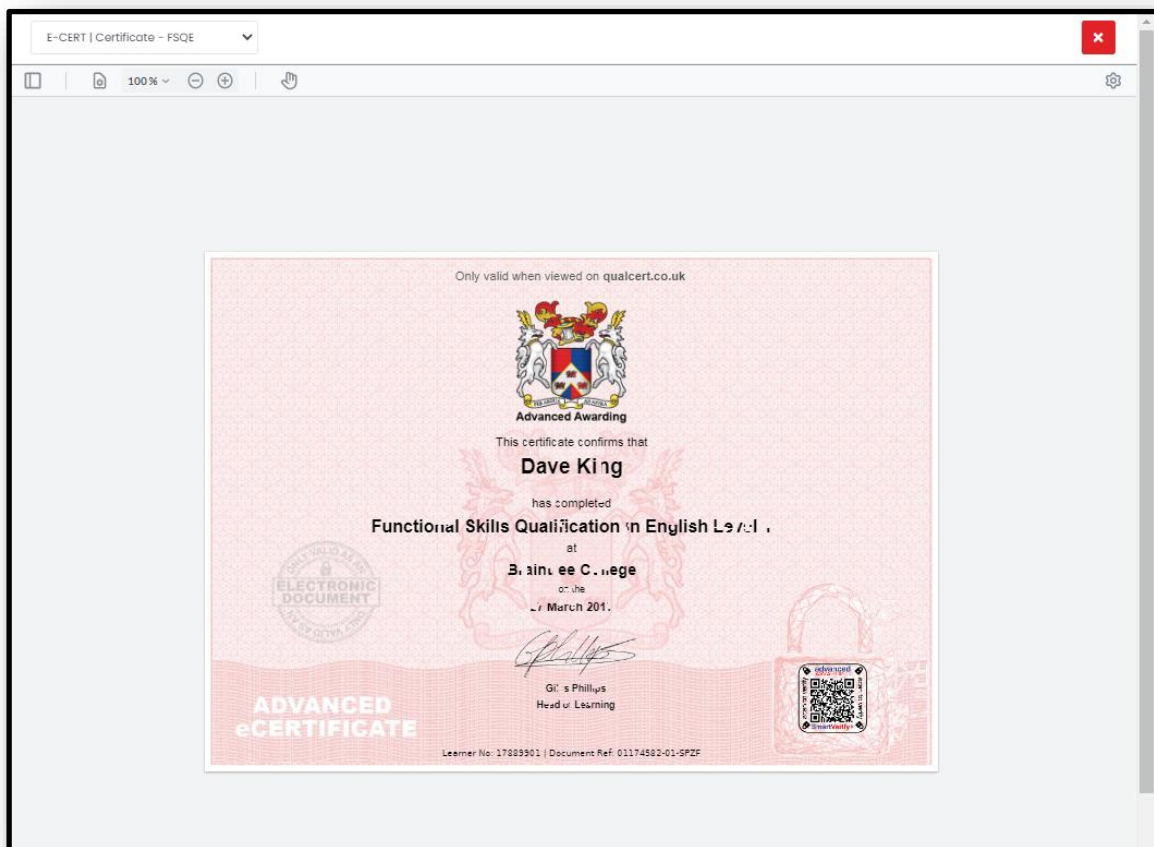
Use this procedure to select the required option.

Step	Action	Note
1	Do you wish to view the qualification? If Yes, <ul style="list-style-type: none"> <li>Click the View button</li> <li>Go to procedure 4.2.2 Viewing the electronic copy of your qualification</li> </ul>	Result: This will display your qualification and associated documents
2	Do you wish to report concerns about the qualification? If Yes,	Result: This will open a form to report concerns about the qualification to the Awarding Body

Step	Action	Note
	<ul style="list-style-type: none"> <li>Click the Report button</li> <li>Go to procedure 4.2.3 Reporting issues with a qualification</li> </ul>	
3	<p>Do you wish to order a printed copy of the qualification?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the Order button</li> <li>Go to procedure 5.2 Ordering a printed copy</li> </ul>	Result: This will enable you to request a printed copy of your qualification











### 4.2.2 Viewing the electronic copy of your qualification

When you view an electronic version of your qualification, the system generates the PDF image, so it may take a few minutes to display.







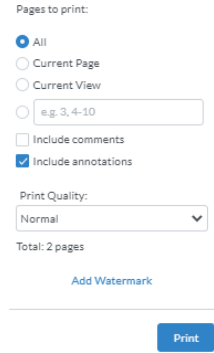

The top menu bar (shown just above the qualification/document image) provides several different options. Starting from the left:



Icon	Description
	<p>This drop-down displays a list of document types to view, which include:</p> <ul style="list-style-type: none"> <li>• Certificate (default view)</li> <li>• Unit certificate</li> <li>• Letter.</li> </ul>
	<p>This icon enables you to turn the side panel on or off</p> <p>If the current document (in view) has multiple pages, they will display in the panel, enabling you to select the next page</p>
	<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>
	<p>This icon enables you to zoom in and out, to the percentage required</p>
	<p>These two icons zoom in and out</p>
	<p>This icon enables you to pan around the image</p>
	<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>

Use the procedure below to view a qualification and documents.

Step	Action	Note
1	<p>Do you want to change the current document in view?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Go to step 2</li> </ul> <p>If No,</p> <ul style="list-style-type: none"> <li>Go to step 3</li> </ul>	
2	Select the document type from the drop-down list at the top of the screen	<p>Result: this will change the current view to that selected</p> <p>As the view is generated, it may take a few minutes to load</p>
3	<p>Do you want to download the current document in view?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Go to step 4</li> </ul> <p>If No,</p> <ul style="list-style-type: none"> <li>Go to step 7</li> </ul>	There is a limit to the number of times you can download the certificate which is controlled by your Awarding Body
4	Select the Settings icon	<p>This is located on the top far-right side on the menu bar</p>  <p>Result: This will display the Settings menu</p>
5	Select the Download option	<p>This is shown below</p>  <p>Result: This will download the document into your Downloads folder and display the downloads window</p>
6	Click back into the document view to close the download window	
7	<p>Do you want to print the current document in view?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Go to step 8</li> </ul> <p>If No,</p> <ul style="list-style-type: none"> <li>Go to step 12</li> </ul>	
8	Select the Settings icon	<p>This is located on the top far-right side on the menu bar</p> 

Step	Action	Note
		Result: This will display the Settings menu
9	Select the Print option	<p>This is shown below</p>  <p>Print</p> <p>Result: This will display the Print option</p> 
10	Select the number of pages to print	
11	Click the Print button	Result: The certificate / document will print to the selected printer
12	Click the close button to close the current document view	<p>This is the close icon as shown below</p> 

### 4.2.3 Reporting issues with a qualification

Use the procedure below to report issues regarding a certificate 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 Team at Advanced Awarding ✕

Someone will reach out to help rectify the problem

Issue reason

Issue Description

The following details will also be included on the email.

<b>Reporter's Name:</b>	Dave King
<b>Reporter's Email:</b>	dave.king@qualcert.co.uk
<b>Student's Enrolment Number:</b>	17889901,
<b>Qualification Title:</b>	Dave King - AST Learner Portal Trainer - Workbook

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

### 4.3 Viewing badges

Some qualifications come with a badge, which is an icon to represent your qualification in a particular area of expertise. These badges can be shared on LinkedIn or with third parties.

The image below shows an example of a badge which displays on the Documents window.



Note: Currently, the Download option is not available.

#### 4.3.1 Adding the badge to your LinkedIn

The badge can be added to your LinkedIn profile, assuming your LinkedIn profile exists.

The image below shows an example of the LinkedIn window where the qualification metadata is automatically pulled through from the Learner portal.

Add license or certification ✕

\* Indicates required

Name\*

Issuing organization\*

This credential does not expire

Issue date

Expiration date

Credential ID


Credential URL

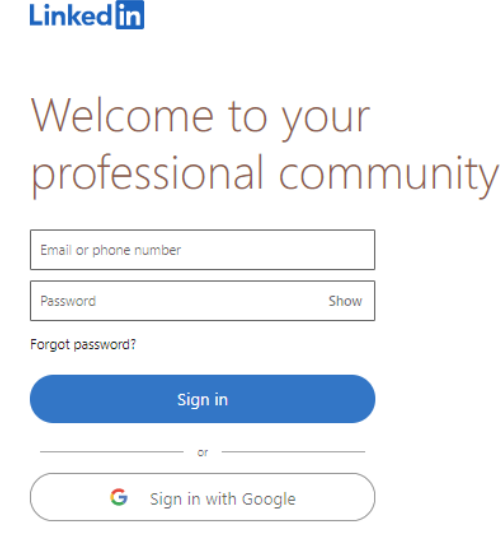
Skills  
Associate at least 1 skill to this license or certification. It'll also appear in your Skills section.

[+ Add skill](#)

[Save](#)

Use the procedure below to add your badge to your LinkedIn profile. Note: you must have a LinkedIn profile to use this procedure.

Step	Action	Note
1	Click the Add to LinkedIn button	This is shown on the Documents window  <div style="text-align: center;">  </div>
2	Are you logged into LinkedIn? If Yes, <ul style="list-style-type: none"> <li>• Go to step 4</li> </ul> If No, <ul style="list-style-type: none"> <li>• Go to step 3</li> </ul>	If you are already logged into LinkedIn then the LinkedIn Add certificate window will display, as shown above  Otherwise you will be required to login to LinkedIn

Step	Action	Note
3	Enter your LinkedIn email and password then click the Sign In button	
4	Check the details in the LinkedIn Add qualification window	<p>The credentials of the qualification and badge will populate automatically, along with the URL of the badge</p> <p>It's important not to amend these details</p>
5	Click the Save button	<p>Result: The badge from your qualification will be linked to your LinkedIn profile</p>

## 5 Creating and viewing orders

### 5.1 Introduction

This section explains how to request a printed copy of your certificate, or view your existing orders. It is split into two sections:


1. Creating a new order; see 5.2 Ordering a printed copy
2. Viewing existing orders; see 5.3 Viewing orders.

### 5.2 Ordering a printed copy

#### 5.2.1 Selecting the qualification

Printed copies of your certificate can be ordered on-line, however there is a charge which is determined by your Awarding Body.

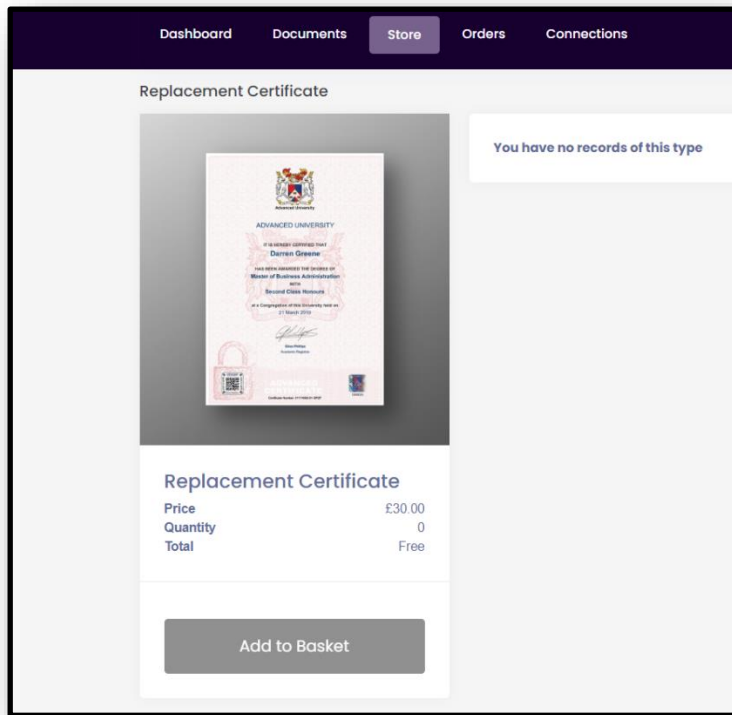
Use this procedure to select a qualification from your Documents screen.

Step	Action	Note
1	Select the Order button on the card of the qualification you wish to order	<p>This is located on the Documents screen, as shown by the image below</p>  <p>Result: This will place the certificate into the Store menu</p> <p>Note the amount charged will depend on your Awarding body</p>

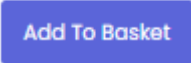

#### 5.2.2 Adding items to your basket



Once you select a qualification, the item(s) are placed in the Store as shown by the image below.



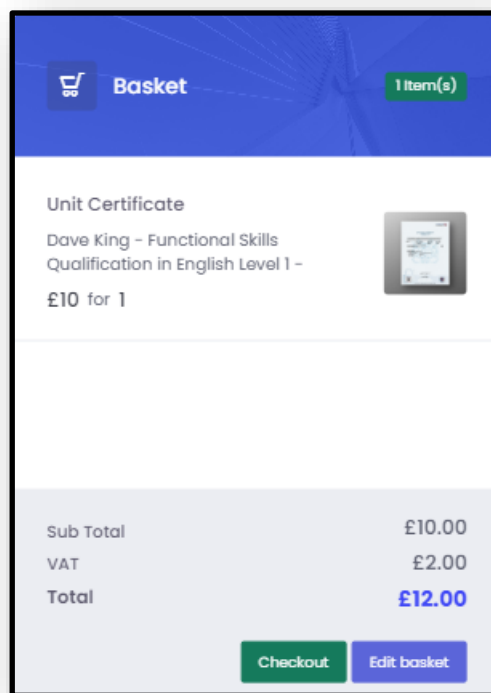
Use this procedure to add items to your basket.

Step	Action	Note
1	Click the Add to Basket button of the item you wish to order	See image below   Result: This will place your item(s) in the basket as shown below 
2	Do you wish to add another item to your basket? If Yes <ul style="list-style-type: none"> <li>Click the Add to Basket button of the second item</li> </ul>	
3	Do you wish to checkout now? If Yes, <ul style="list-style-type: none"> <li>Continue with procedure 5.2.3 Viewing the basket</li> </ul>	


Step	Action	Note
	If No, <ul style="list-style-type: none"> <li>The items will remain in the Store until you are ready to complete the order</li> <li>Exit from this procedure</li> </ul>	

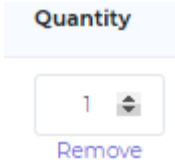
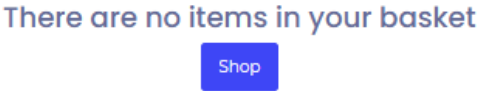
### 5.2.3 Viewing the basket

Once you have added items to your basket they will appear here, as the image below shows.



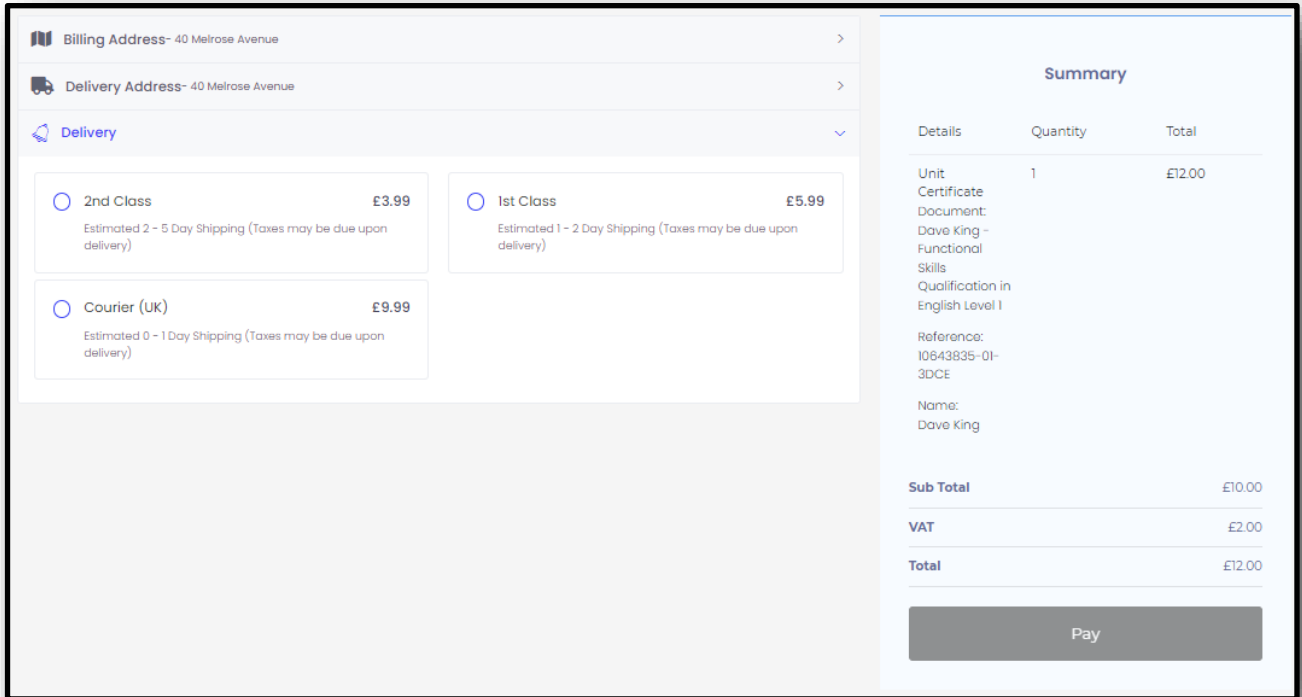
Use this procedure to view your basket.

Step	Action	Note
1	Click the Basket item	See image below    Result: This displays your basket; see image previously.



Step	Action	Note
2	<p>Do you want to view your basket or make any changes to it?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Go to step 3</li> </ul> <p>If No,</p> <ul style="list-style-type: none"> <li>Click the Checkout button</li> <li>Go to procedure 5.2.4 Completing the purchase</li> </ul>	<p>Result: The screen will navigate to the Checkout window</p>
3	<p>Click the Edit Basket button</p>	<p>Result: This will display the contents of your basket</p>
4	<p>Do you want to change the quantity of items you require?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click the up or down arrow in the Quantity box</li> </ul>	<p>See image below</p>  <p>Result: The quantity will change</p>
5	<p>Do you want to remove the items from the basket?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>Click Remove link</li> <li>Click the Shop button</li> <li>Return to the procedure to select the qualification to order</li> </ul>	<p>Result: The item will be removed from the basket</p> <p>There are no items in your basket</p> 

## 5.2.4 Completing the purchase

When you select the Checkout, the following screen will appear.



Use this procedure to complete the purchase.

Step	Action	Note
1	Click the Billing address link	See image below  Result: This will list all addresses loaded in the system
2	Do you need to add your billing address? If Yes, <ul style="list-style-type: none"> <li>Go to step 3</li> </ul> If No, <ul style="list-style-type: none"> <li>Select your billing address from the card</li> <li>Go to step 6</li> </ul>	See image below (select current address) 
3	Click the + link	Result: This will open the Address details window
4	Enter your billing address details	This includes: <ul style="list-style-type: none"> <li>First and Last name</li> <li>Address</li> <li>City</li> </ul>

Step	Action	Note
		<ul style="list-style-type: none"> <li>• Postcode</li> <li>• Country</li> </ul>
5	Click the Add button	Result: This will add your address to a card
6	Click the Delivery address link	Result: This will list all addresses loaded in the system
7	<p>Do you need to add your Delivery address?</p> <p>If Yes,</p> <ul style="list-style-type: none"> <li>• Go to step 8</li> </ul> <p>If No,</p> <ul style="list-style-type: none"> <li>• Select your Delivery address from the card</li> <li>• Go to step 9</li> </ul>	
8	Repeat steps 3 to 5	
9	Click the Delivery link	Result: This will list all delivery methods available
10	Select the preferred delivery method	Result: The cost will be added to the total
11	Check that the summary details are correct	
12	Select the Pay button	<p>Result: The screen will navigate to the payment window where you enter your card details.</p> <p>Once the payment goes through the system will place your request in the Orders menu and the screen will return to the Dashboard.</p>

### 5.3 Viewing orders

The Orders window shows all items that are on order, as the image below shows.

Orders

Search for any term... Filter! ⚙️

<input type="checkbox"/>	Full name	Status	Delivery Type	Total	Created by	Creation time	Actions
<input type="checkbox"/>	Dave King	Processing	Collection	£20.00	admin2 admin2	18/11/2022	<a href="#">🔍</a>
<input type="checkbox"/>	Dave King	Processing	2nd Class	£33.99	admin2 admin2	18/11/2022	<a href="#">🔍</a>
<input type="checkbox"/>	Dave King	Pending	Courier (UK)	£40.00	admin admin	12/01/2023	<a href="#">🔍</a>
<input type="checkbox"/>	Dave King	Pending	Collection	£30.00	admin2 admin2	12/01/2023	<a href="#">🔍</a>
<input type="checkbox"/>	Dave King	Pending	Collection	£30.00	admin2 admin2	12/01/2023	<a href="#">🔍</a>

20 Showing 1 - 5 of 5

This screen shows:

- Status of the order, whether its pending, processing, or complete
- Delivery type, how the order will be delivered
- Total amount of the order
- Created by and time
- Actions menu to view the order detail
- Search option.

### 5.3.1 Viewing the order

The order details window provides the detail of your order, as the image below shows.

Orders | Details
← Back

**Details**

Payment:

Delivery: 2nd Class

Status:

**Billing**

Name: Kevin Bassett

Address: Eastern Business Park  
St Mellons  
Cardiff  
Select  
CF3 5EA  
United Kingdom

**Delivery**

Name: Kevin Bassett

Address: Eastern Business Park  
St Mellons  
Cardiff  
Select  
CF3 5EA  
United Kingdom

Details	Quantity	Price	Total	
Certificate Document: Qualification Reference: 23686403-01-K3BR Student Name: Dave King	1	£30.00	£30.00	<b>Summary</b>  Sub Total <span style="float: right;">£30.00</span> Shipping <span style="float: right;">£3.99</span> Total <span style="float: right;">£33.99</span>
Confirmation of Award	1	£0.00	£0.00	

**Logs**

Status	Creation time	Actions
No records found		

Use this procedure to view the details of an order.

Step	Action	Note
1	Click the Actions button on the item you wish to view	This is located under the Actions heading    Result: This will open the Order details window
2	View the details of the order	
3	Click the Back button	Result: The screen will return to the Orders window

### 5.3.2 Searching for an order

The Filter option enables you to search for particulars of an order, as the image below shows.


Orders

Q Use the fields below Filter!

-

Reset Filter

Use this procedure to search for an order.

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>First or last name of the Learner</li> <li>Product code</li> <li>Delivery type</li> <li>Status</li> <li>Order min and max values</li> <li>Order from and to date</li> </ul>	Result: The results will display in the panel below
3	Continue with the previous procedure	



## 6 Managing connections

### 6.1 What are connections?

Connections enable you to share your certificates and badges with prospective employers or other educational bodies (aka third party). All connections are managed via the Connections window.

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.

The image below shows a request sent to a third party in a status of pending, that is, they have yet to accept the connection request. Once they accept the request, the status will show as Active (in green).

The screenshot shows a web interface titled "Connections". At the top right is a green "Add Connection" button. Below it is a search bar with the placeholder "Search for any term..." and a green "Filter!" button. There are two tabs: "Active" (selected) and "Inactive". The main content is a table with the following columns: "Third party name", "Third party email", "Status", "Initiated By", "Documents Shared", "Expires", and "Actions". One row is visible with the following data: "Emmanuel Lumor", "Emmanuel.Lumor@advanced...", "Pending" (in a yellow box), "Student", "None", "03/02/2023", and three action icons (edit, email, delete). At the bottom left, there is a dropdown menu set to "10" and the text "Showing 1 - 1 of 1".

Third party name	Third party email	Status	Initiated By	Documents Shared	Expires	Actions
Emmanuel Lumor	Emmanuel.Lumor@advanced...	Pending	Student	None	03/02/2023	[edit] [email] [delete]

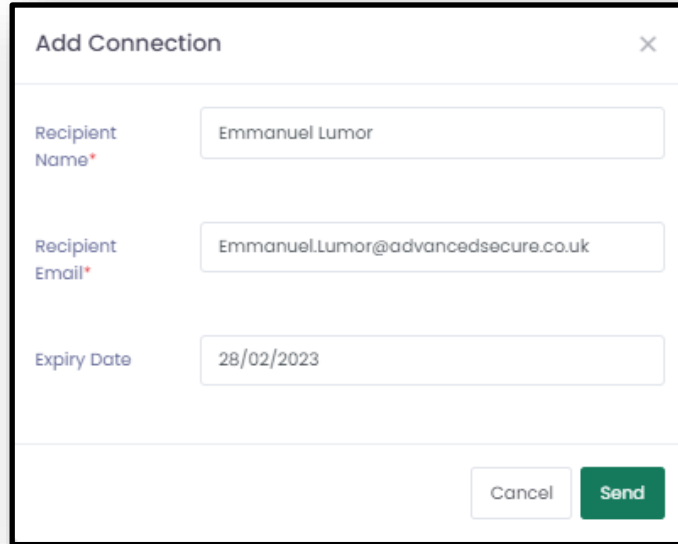
The connection status line shows:

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

### 6.2 Creating new connections

## 6.2.1 Creating a new connection

Use the procedure below to create a new connection to a third party.

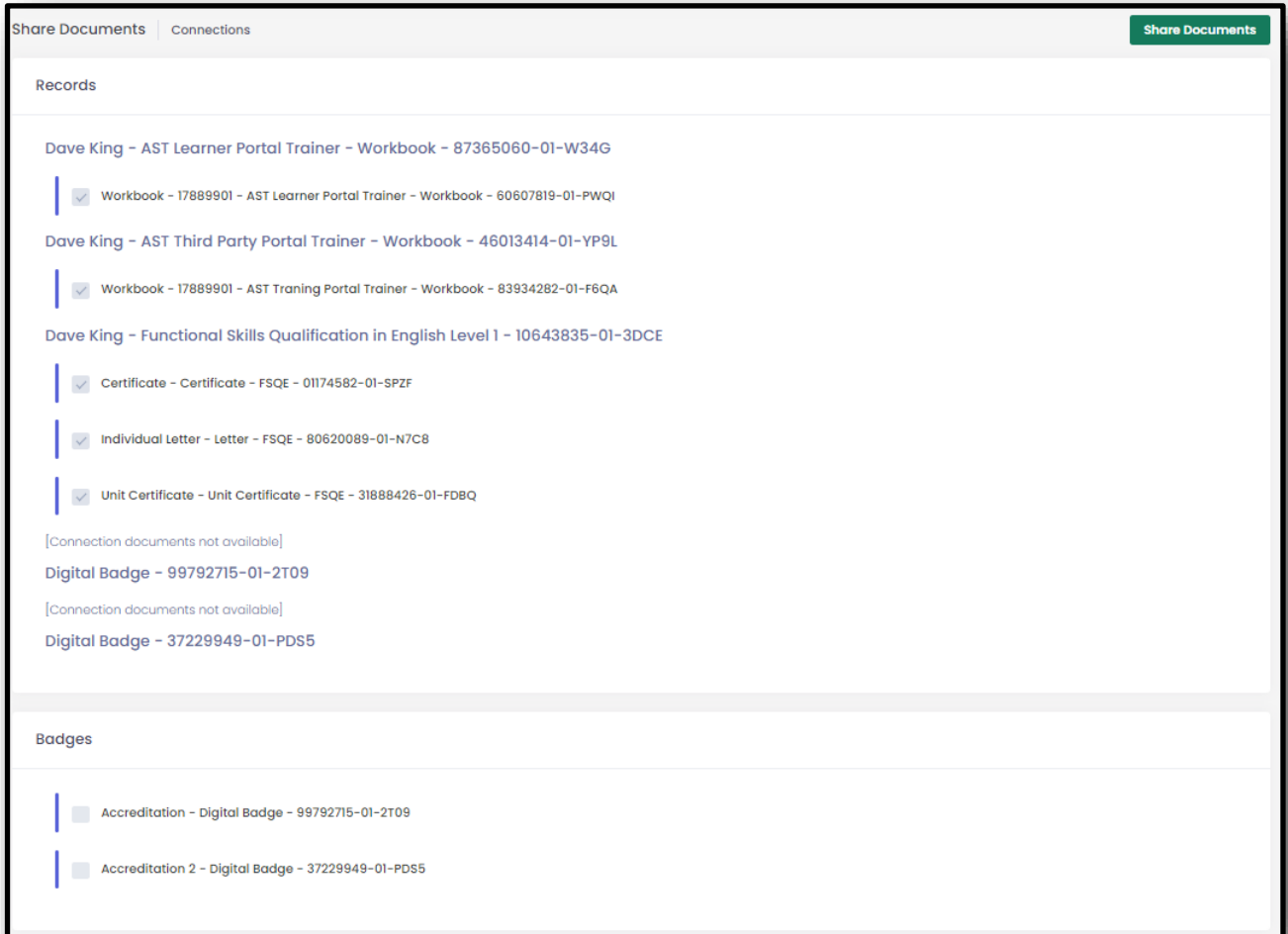


Step	Action	Note
1	Click the Add Connection button	This button is located at the top of the window  Result: This will open the Add connection window, as shown above
2	Enter the Recipient name	This is the third party to whom you wish to share your qualification with
3	Enter the Recipient email address	
4	Click the Send button	Result: A request is sent to the third party This request will then have a status of 'Pending' until they accept the connection request
5	Continue with the next procedure	

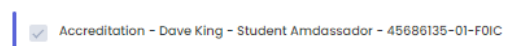
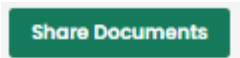
## 6.2.2 Sharing documents

The Share documents window will list:

- Certificate, letter, and workbook
- Plus any badges that you may have.



Use the procedure below to share a qualification or badge with a new connection.

Step	Action	Note
1	Click the grey checkbox to the left of the item you wish to share	<p>See image below</p>  <p>Result: This will open the Add connection window, as shown above</p>
2	Click the Share documents button	<p>See image below</p>  <p>Result: This will display a successful confirmation message and return you to the connections window</p>

## 6.3 Managing connections

Once the third party accepts the connection request, the status will change from pending to active, as the image below shows.

Third party name	Third party email	Status	Initiated By	Documents Shared	Expires	Actions
Justin Clarke	Justin.Clarke@advancedsecur...	Pending	Student	1	03/02/2023	[Edit] [Email] [Delete]
Tracy Lyon	tracy.lyon@advancedsecur...	Active	Student	2	10/02/2023	[Edit] [Clock] [Delete]


Once a connection is established you can:

- Change what documents are shared with a third party
- Change the expiry period of a connection
- Delete the connection

See the procedures below.

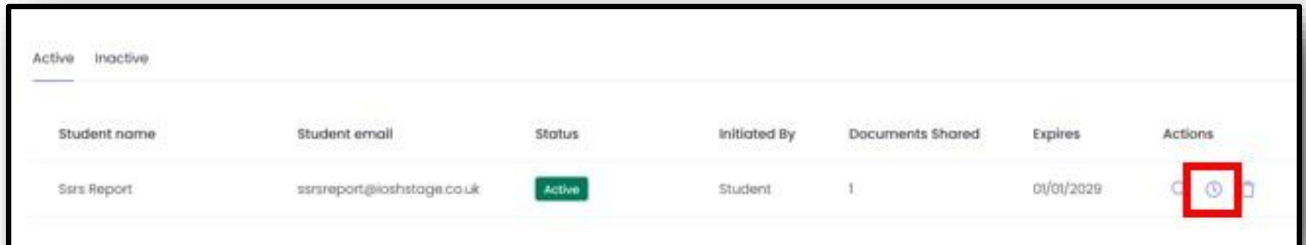
### 6.3.1 Changing shared documents


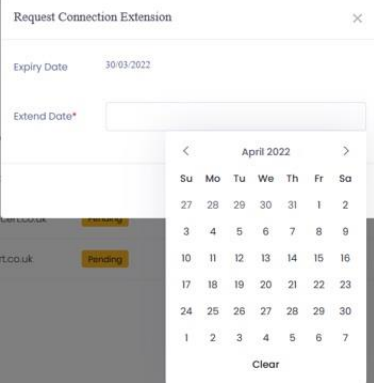
Use the procedure below to change the shared documents with a connection. Note, you can only do this once the third party has accepted the request.

Step	Action	Note
1	Click Edit button	This is located under the Actions heading  Result: This will display the Share Documents window
2	Click the grey checkbox to the left of the item you wish to share or un-share	
3	Click the Share documents button	Result: This will change what the third-party can view via the connection The screen will return to the Active screen

### 6.3.2 Extending the connection

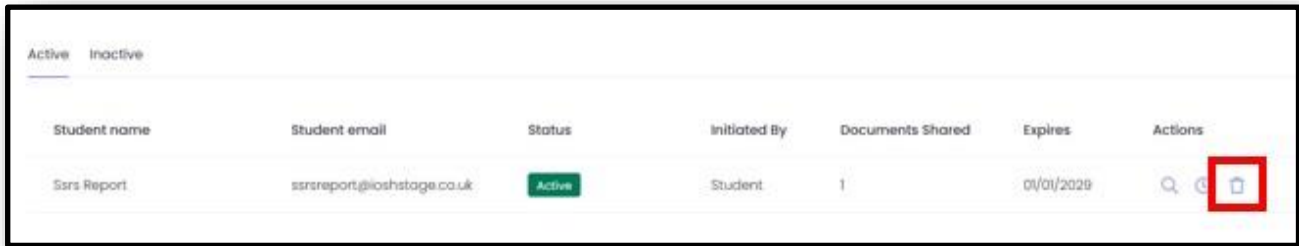
All connection requests are created with a set expiry date. Use this procedure to extend this period.


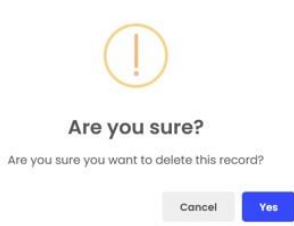
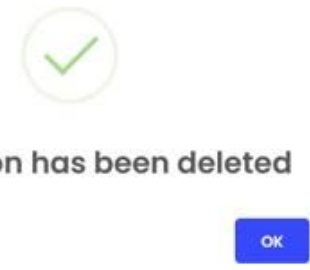


Step	Action	Note
1	Click the Clock icon	This is located under the Actions heading  Result: This will display the Request Connection Extension
2	Select the extension date	
3	Click the Save button	Result: This will display the confirmation window
4	Click the OK button	Result: This will send an extension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

### 6.3.3 Cancelling the connection

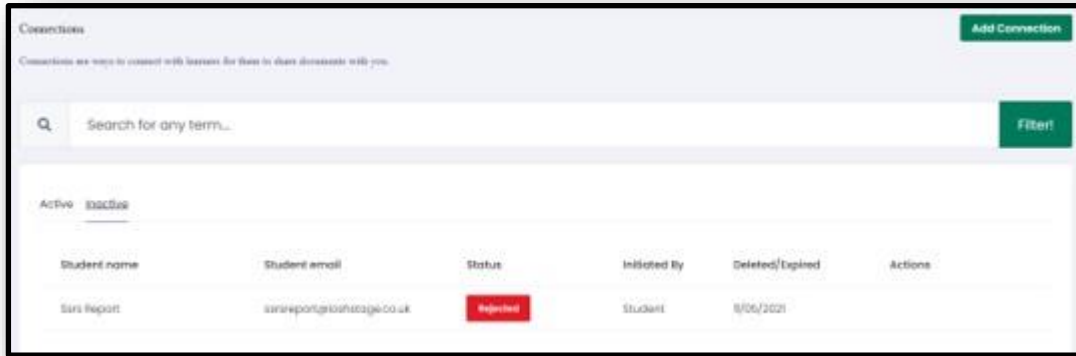
You can cancel a connection by following the procedure below.



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

### 6.3.4 Viewing inactive connections

This tab displays any connection which is expired, rejected, or cancelled. If a connection has been cancelled, then you will need to initiate the connection from the start. Otherwise if the connection has expired, use this procedure to extend the connection



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	Click the Clock icon alongside the connection you wish to extend	
3	Continue with procedure 6.3.2 Extending the connection	

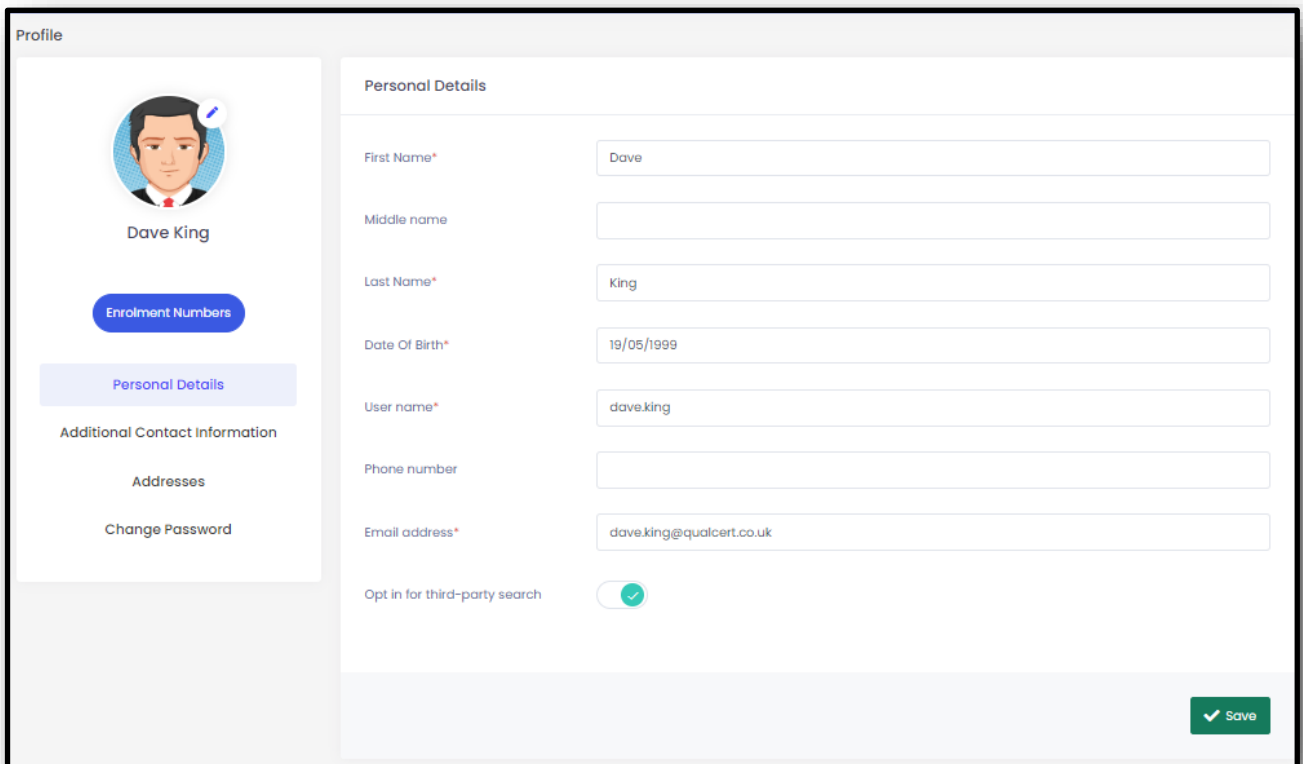
## 7 Using Profiles

### 7.1 What is a Profile?

All users registered on the Learner portal have a profile, which provides information about you. The Profile screen enables you to view, add or change:

- Photo (where supplied)
- Enrolment number
- Personal details, dob, phone number etc
- Additional Contact information
- Change password (your profile only)
- Opt into the Third-party search.

See image below



The screenshot shows a user profile page titled 'Profile'. On the left, there is a user card for 'Dave King' with a profile picture and a pencil icon. Below the name are buttons for 'Enrolment Numbers', 'Personal Details' (which is highlighted), 'Additional Contact Information', 'Addresses', and 'Change Password'. The main area is titled 'Personal Details' and contains the following fields:

First Name*	Dave
Middle name	
Last Name*	King
Date Of Birth*	19/05/1999
User name*	dave.king
Phone number	
Email address*	dave.king@qualcert.co.uk
Opt in for third-party search	<input checked="" type="checkbox"/>


A green 'Save' button with a checkmark is located at the bottom right of the form.



## 7.2 Where can I find my Profile?

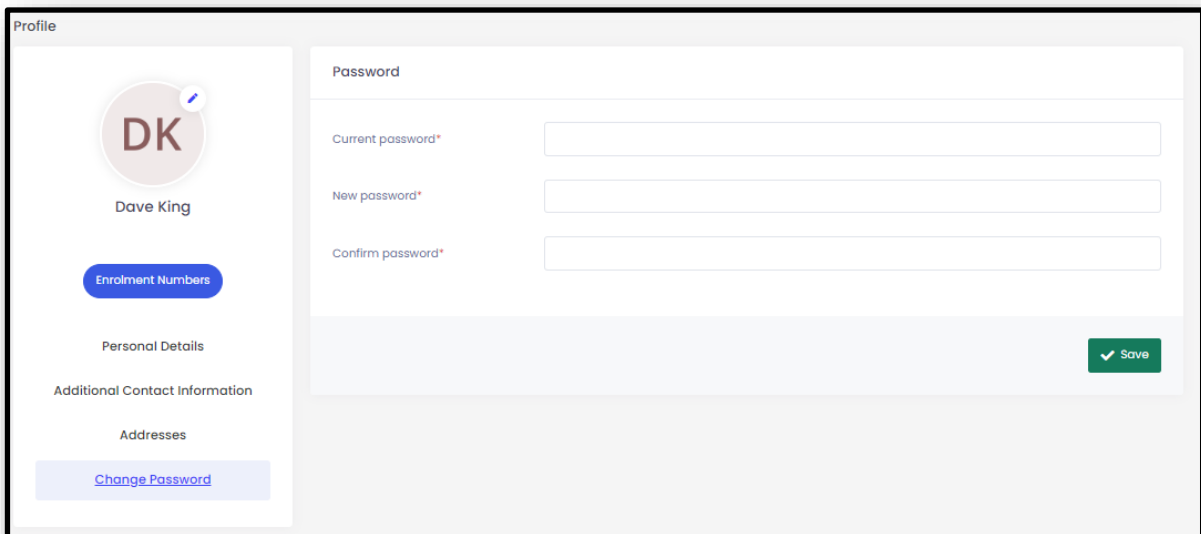
### 7.2.1 View or edit your profile

Use this procedure to view or edit your profile.

Step	Action	Note
1	Select your name	This is located at the top right-hand corner of the screen    Result: This will open your profile and logout option page
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> <li>Opt in to third-party search</li> </ul>	See 7.2.4 Opting in with the third party search function

### 7.2.2 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


### 7.2.3 Opting in with the third party search function

The third party search function enables third parties (prospective employers, other universities etc) who have registered with, and using the Third-party portal, to undertake a quick search of any Learner who matches a set criterion. Only those Learners who have opted in, will have their details visible.

The third party search (in the Third Party portal) shows:


- Full name of the Learner
- Reference number of the qualification or document
- Title of the qualification
- Award date

Use this procedure to opt-in for the third party search.

Step	Action	Note
1	Click the Personal Details from your profile screen	Result: This will display the Personal Details screen
2	Select the Opt in check box	This is off by default    Result: your details will be available in the search results
3	Click the Save button	Result: This will save your changes

### 7.2.4 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>Hi, Dave </p> <p>You will be logged out of the system</p>