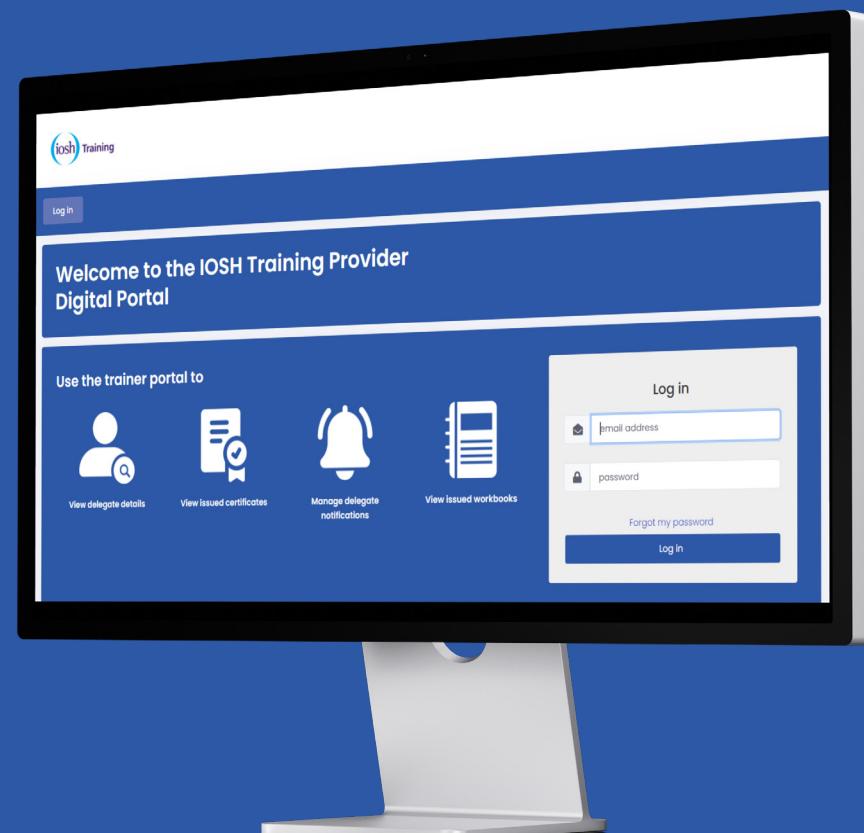


IOSH digital portal user guide for advanced administrators



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1 Introduction

The IOSH training provider digital portal enables training providers to access and issue digital workbooks and certificates to IOSH course delegates.

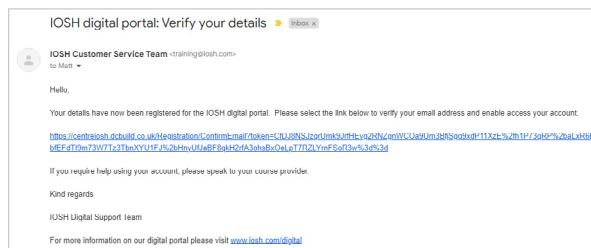
Features:

- Issue digital IOSH certificates to delegates.
- View, download and print delegates' individual workbooks and certificates.
- Keep a record of delegates who have been issued with digital IOSH products.
- Manage user accounts.

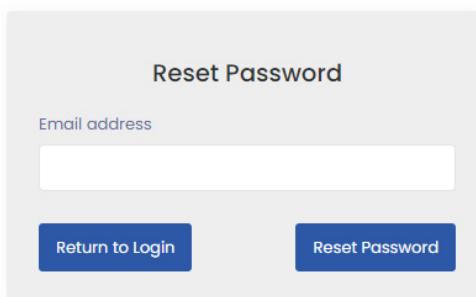
Please note: this user guide has been written for desktop access to the digital portal. If you are accessing on mobile, some screens may look a little different. Functionality remains the same.

2 Log in

You'll receive a welcome email from IOSH, inviting you to sign in to the portal. Click the link in the email to reach the log in screen for the portal.



Next, click the 'Forgot my password' link. This will take you to the 'Reset password' screen.



Enter the email address you used to register with us (*tip: it will be the email address your welcome email was sent to*).

Click on the 'Reset Password' button.

If there is a registered user profile associated with that email address*, the system will prompt you to enter your password.

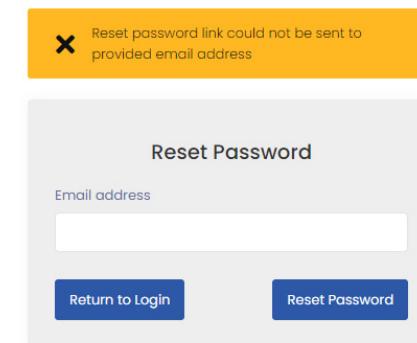
To be accepted, your password needs to be a minimum of nine characters and contain:

- at least one digit (0–9)
- at least one lowercase character
- at least one alpha-numeric character (!–+)
- at least one uppercase character.

Re-enter your password and click 'Reset Password'. You will now be directed back to the log in screen where you can sign in to the portal.

*If you receive the below error message, you may have mis-typed your email address.

Re-type your email address ensuring it's entered accurately. If the error message continues to show, contact digitalsupport@iosh.com for help.



Forgotten password

If you forget your password, you can use the 'Forgot my password' link on the login screen and the steps above to reset it at any time.

3 Dashboard

When you log in to the portal, you'll be taken to the main dashboard.

Dashboard	Your current view. Navigate back to the main dashboard at any time using this link in the navigation ribbon.
Records	Search, view and manage delegate records.
Release	Search, view and release delegate digital documents.
Users	View and manage other admin user records.
Toggle between centres	If you work for more than one IOSH training provider, use the drop down to the right of the screen to select the appropriate organisation for your session.
My profile	View and manage your profile details by navigating to your circled initials at the top right of the screen.
Pending records	The number of certificate records pending release.
Pending notifications	The number of pending email notifications (this is automated and will reset to 0 when all pending email notifications have been sent by the system).

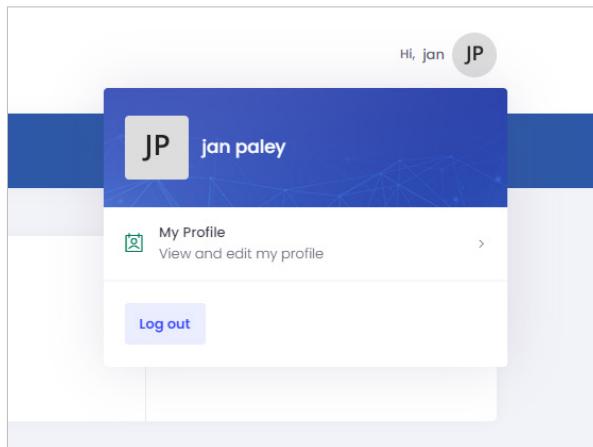
Validate record

Check if a certificate is valid by adding the certificate reference number (printed on the certificate next to the IOSH certificate number) to the 'Validate record' field on your dashboard.

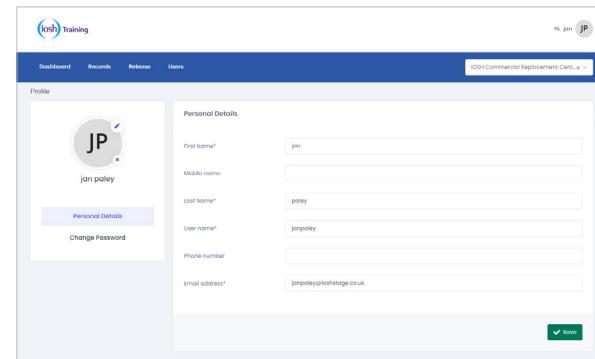
If the record is valid the below message will appear.

4 Manage 'My Profile'

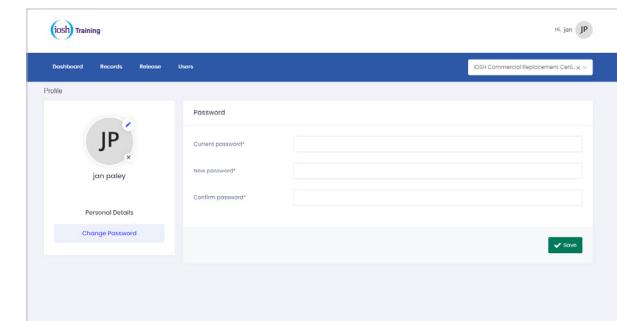
Select the grey circle in the top right corner to access the 'My profile' menu.



Click 'My Profile' to make edits to your profile, such as adding or amending your personal details.

A screenshot of the 'Profile' page. At the top, it shows the 'Dashboard', 'Records', 'Release', and 'Users' menu items. Below that, it says 'Profile'. On the left, there's a circular profile picture with 'JP' and the name 'jan paley'. Below the picture, there are two buttons: 'Personal Details' (highlighted in blue) and 'Change Password'. The 'Personal Details' section contains fields for 'First name*', 'Middle name', 'Last name*', 'User name*', 'Phone number', and 'Email address*'. Each field has a placeholder text and a small 'Required' asterisk. At the bottom right of the form is a green 'Save' button with a checkmark icon.

If you need to change your password, you can do that by clicking 'Change password' at the bottom of the left hand navigation menu. Enter your existing password in 'Current password', then repeat the new password in 'New password' and 'Confirm password'. Select 'Save'.

A screenshot of the 'Change Password' page. At the top, it shows the 'Dashboard', 'Records', 'Release', and 'Users' menu items. Below that, it says 'Profile'. On the left, there's a circular profile picture with 'JP' and the name 'jan paley'. Below the picture, there are two buttons: 'Personal Details' (highlighted in blue) and 'Change Password'. The 'Change Password' section contains fields for 'Current password*', 'New password*', and 'Confirm password*'. Each field has a placeholder text and a small 'Required' asterisk. At the bottom right of the form is a green 'Save' button with a checkmark icon.

5 Issue digital documents to delegates

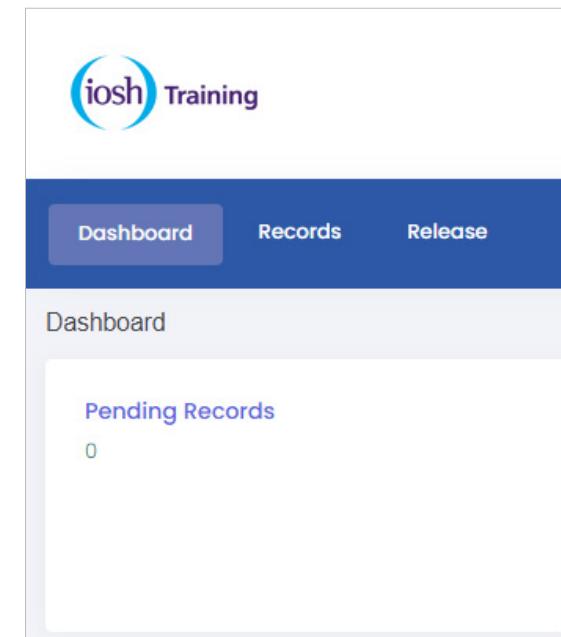
When a delegate is first registered onto a training course in the IOSH Training Provider Portal (TPP) and a digital workbook has been selected for them, they will be automatically issued with their workbook, and an email will be sent to them prompting them to register on the digital portal in order to access it. You'll also be able to view the workbook record from your portal under the 'Records' tab. (See chapters 6 and 7.)

You do not have to do anything, unless a delegate has had issues receiving their workbook or logging into the portal. If this happens, contact digitalsupport@iosh.com for help.

When a delegate has passed and completed an IOSH training course and this has been logged on the IOSH Training Provider Portal (TPP), the digital certificates will be released to the digital portal for you to issue to each of your delegates. You will then be able to log in and issue digital certificates to your delegates from the portal.

A 'published record summary' email will also be sent to the main admin email address for your organisation when the documents are available.

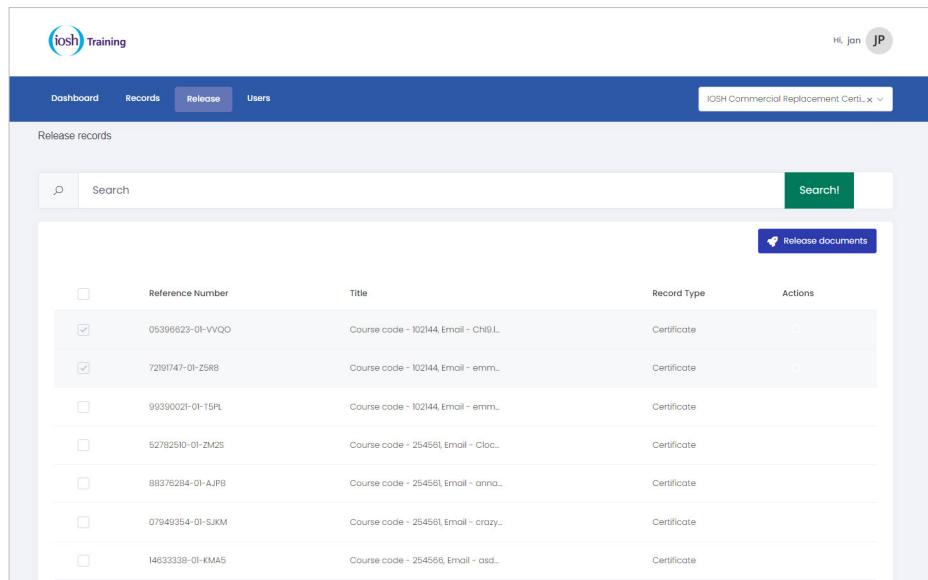
You'll see the number of documents which are pending release on the main dashboard.



To release certificates, select 'Release' on the top navigation bar or click the 'Pending Records' link.

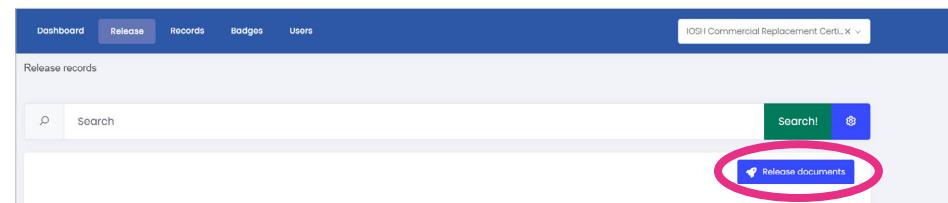
The page displays a full list of delegates who are pending release of digital documents.

'Select all' or select the individuals you would like to issue documents to by checking the box to the left of each record.

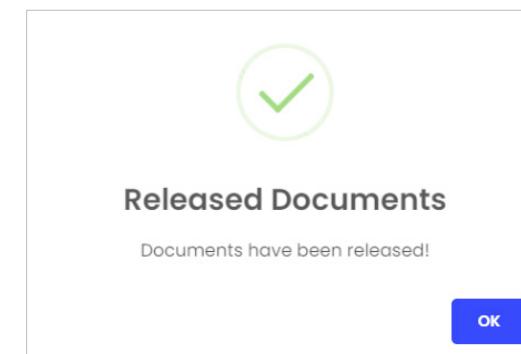


Reference Number	Title	Record Type	Actions
<input type="checkbox"/> 05396623-01-VVQO	Course code - 102144; Email - Chi9L...	Certificate	<input type="checkbox"/>
<input checked="" type="checkbox"/> 72191747-01-Z5R8	Course code - 102144; Email - emm...	Certificate	<input type="checkbox"/>
<input type="checkbox"/> 99390021-01-15PL	Course code - 102144; Email - emm...	Certificate	<input type="checkbox"/>
<input type="checkbox"/> 52782510-01-ZM25	Course code - 254561; Email - Cloc...	Certificate	<input type="checkbox"/>
<input type="checkbox"/> 88376284-01-AJPB	Course code - 254561; Email - anna...	Certificate	<input type="checkbox"/>
<input type="checkbox"/> 07949354-01-SJKM	Course code - 254561; Email - crazy...	Certificate	<input type="checkbox"/>
<input type="checkbox"/> 14633338-01-KMA5	Course code - 254566; Email - asd...	Certificate	<input type="checkbox"/>

Select 'Release Documents'. This will issue an email to each delegate notifying them their workbook or certificate is available to view.

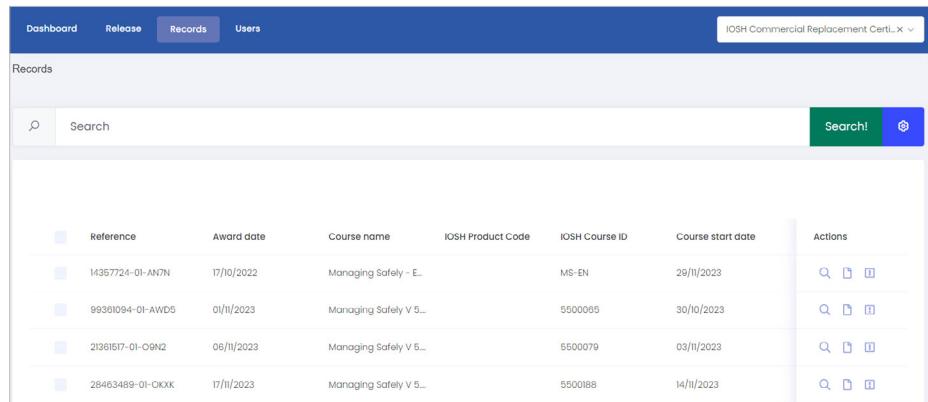


When your documents have been successfully released you will receive the below onscreen message.



6 View and download delegate digital documents

Select 'Records' in the top navigation bar to view all delegate records and digital documents. A full list of delegates will be displayed in alphabetical order.



The screenshot shows the 'Records' page of the IOSH digital portal. The top navigation bar includes 'Dashboard', 'Release', 'Records' (which is highlighted in blue), and 'Users'. A search bar at the top right contains the text 'IOSH Commercial Replacement Cert...'. The main content area is titled 'Records' and features a search bar with a magnifying glass icon and a 'Search!' button. Below the search bar is a table with the following columns: Reference, Award date, Course name, IOSH Product Code, IOSH Course ID, Course start date, and Actions. The table contains five rows of data:

Reference	Award date	Course name	IOSH Product Code	IOSH Course ID	Course start date	Actions
I4357724-01-AN7N	17/10/2022	Managing Safely - E...	MS-EN	29/11/2023	  	
99361094-01-AWD5	01/11/2023	Managing Safely V 5...	5500085	30/10/2023	  	
21361517-01-O9N2	06/11/2023	Managing Safely V 6...	5500079	03/11/2023	  	
28463489-01-OKKK	17/11/2023	Managing Safely V 5...	5500188	14/11/2023	  	

Search for a specific record by typing any term into the search bar, or use the advanced search fields by clicking the blue cog icon next to the search bar.

Record results listings include the following information:

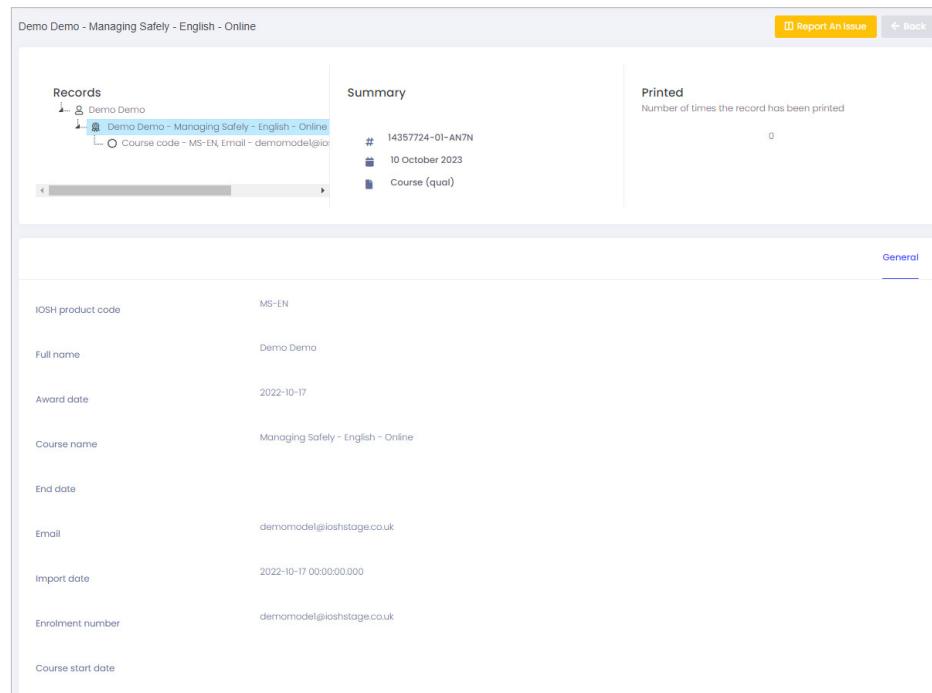
Reference	Unique record reference. Usually a mixture of numbers and letters, separated by dashes (eg 38211060-01-2VGN).
Award date	Date the delegate was awarded their certificate.
Course name	Title of the training course the delegate is registered on.
IOSH product code	The IOSH course reference code (between two and six letters, usually an acronym of the course title, eg: MS= Managing Safely®).
IOSH course ID	Your unique six or seven-digit course reference number, provided when you register your course on the Training Provider Portal (TPP).
Course start date	The start date of the training course the delegate is registered on.
Actions	Details for each delegate record (see below).

	View record details
	View, download and print documents associated with record (workbook and/or certificate)
	Report an issue

View delegate records

To view individual delegate records, click on the magnifying glass icon under 'Actions' 

You will be taken to the below screen where you can see a summary of their details and the number of times they have downloaded and printed their digital documents.



Demo Demo - Managing Safely - English - Online

Report An Issue Back

Records

- ↳ Demo Demo
 - ↳ Demo Demo - Managing Safely - English - Online
 - Course code - MS-EN, Email - demomodel@io

Summary

Printed

Number of times the record has been printed

0

14357724-01-AN7N

10 October 2023

Course (qua)

General

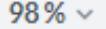
IOSH product code	MS-EN
Full name	Demo Demo
Award date	2022-10-17
Course name	Managing Safely - English - Online
End date	
Email	demomodel@ioshstage.co.uk
Import date	2022-10-17 00:00:00.000
Enrolment number	demomodel@ioshstage.co.uk
Course start date	

Please note: delegates have unlimited downloads and prints for certificates. Workbooks are limited to one download and one print. If they require another workbook download or print, contact digitalsupport@iosh.com.

View, download and print digital workbooks or certificates

To view, download or print digital workbooks or certificates in a delegate record, click on the paper icon under 'Actions'. 

The PDF of the document will open in a separate window in DocViewer. You will be able to carry out several actions in DocViewer:

Icon	Description
	Use this drop down to view the different documents available in the delegate record (ie. digital workbook and/or certificate).
	This icon enables you to turn the navigation side panel on and off for a multi-page document, such as a course workbook.
	This icon enables you to view various page options: <ul style="list-style-type: none">Page transition. You can choose whether each page of a document is separated with a page break, or whether the pages run on to one another with no page break - as one document.Page orientation. Rotates the page clockwise or anti-clockwise by 90 degrees.Page layout. You can choose if your document is displayed one page at a time or as a double page.
	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 document.
	This icon displays different settings for the workbook or certificate. Available options include: <ul style="list-style-type: none"> Display Full Screen. This shows the document in full-screen mode. Press the escape (Esc) key to exit. Download and save. Click this icon to save your document to a local folder. Print. Click this icon to activate the print screen. The print screen will open in your browser.
	Click the close button to close the current document view.

Report an issue on a delegate record

Report any issues that have occurred with delegate records by clicking the 'Report an Issue' icon under 'Actions'. 

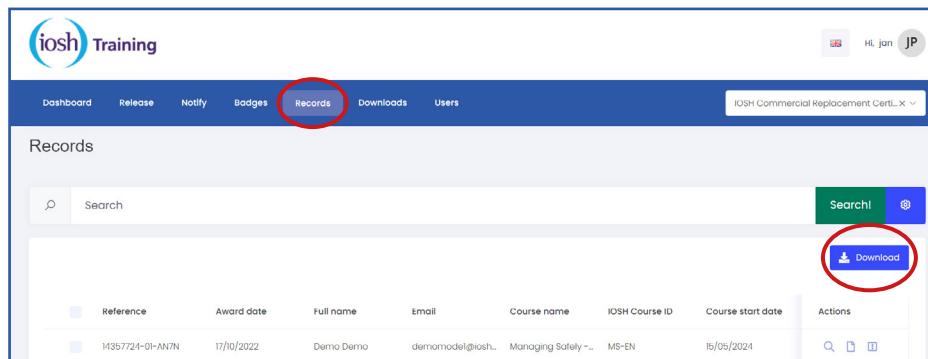
Complete the form and press 'send'. This will send an email to the IOSH digital support team who will be in touch as soon as possible to help resolve this.

Bulk download digital documents

If you have multiple delegates that you need to download digital documents for, you can do this using the portal's bulk download feature.

Find the bulk download feature by clicking on the 'Records' tab in the top navigation bar.

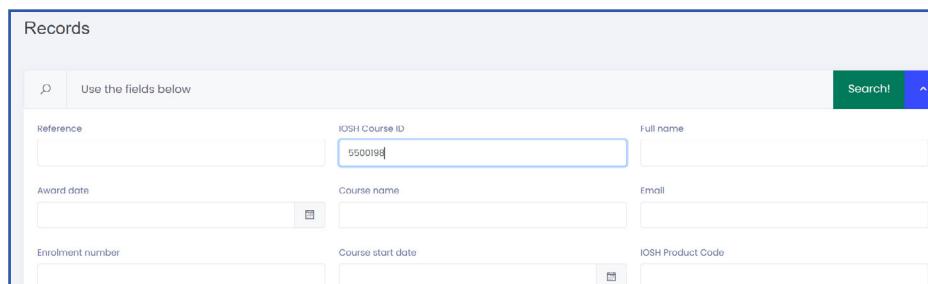
You'll see a download button to the right of the screen, at the top of your records list.



The screenshot shows the 'Records' tab highlighted in the top navigation bar. Below the navigation bar is a search bar with a 'Search' button and a cog icon. To the right of the search bar is a 'Download' button with a blue icon. The main area displays a table of records with columns: Reference, Award date, Full name, Email, Course name, IOSH Course ID, Course start date, and Actions. A specific row is selected, and the 'Actions' column for that row contains a 'Download' button, which is also highlighted with a red circle.

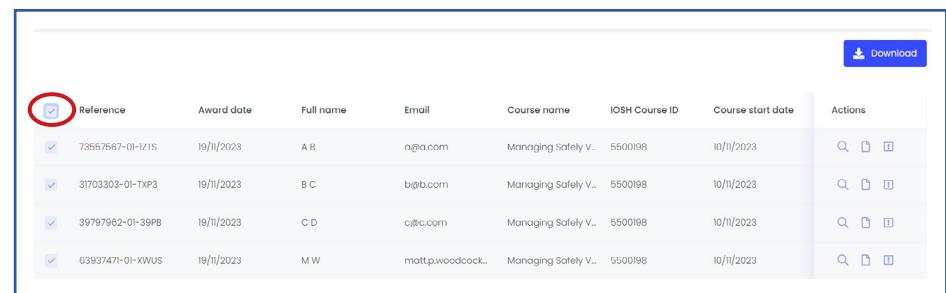
Select the records you would like to download. Filter using the advanced search fields. (Click the cog icon next to the search bar to reveal the advanced search fields if they don't show straight away.)

In the below example, we have performed a search based on course ID. Click 'Search!' to return the results.



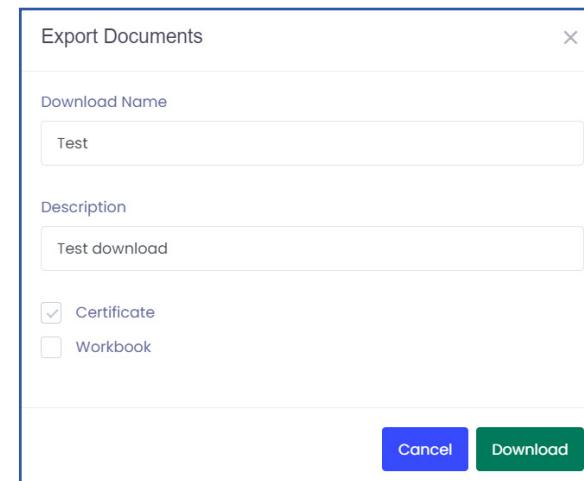
The screenshot shows an advanced search interface with various filter fields. The 'IOSH Course ID' field is populated with '5500198'. The 'Search!' button is visible at the top right of the search area.

Once you've filtered your records, select the ones you'd like to download by ticking the box on the left-hand side of each record. Select all by ticking the box at the top of the records list (circled).



The screenshot shows a list of records with checkboxes on the left side of each row. A red circle highlights the checkbox in the first row. At the top right of the list is a 'Download' button. The table columns are: Reference, Award date, Full name, Email, Course name, IOSH Course ID, Course start date, and Actions.

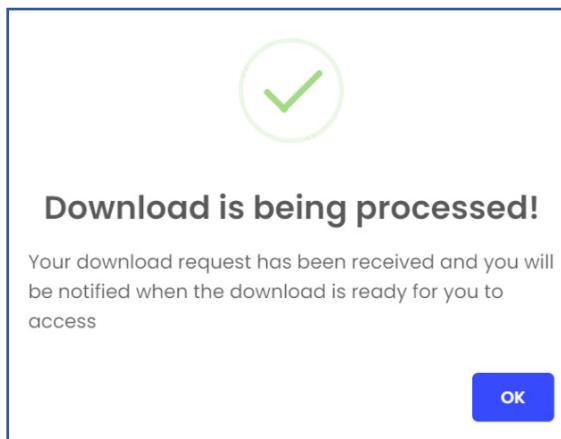
Click the 'Download' button and complete all the fields in the pop out form. You can choose which documents you'd like to export for each record by removing or keeping the ticks next to 'Certificate' and 'Workbook' at the bottom of the form. In this example, we've opted to download just certificates. Once the form is complete, click 'Download'.



The screenshot shows a 'Export Documents' pop-up window. It has fields for 'Download Name' (set to 'Test') and 'Description' (set to 'Test download'). Below these are checkboxes for 'Certificate' (checked) and 'Workbook' (unchecked). At the bottom are 'Cancel' and 'Download' buttons.

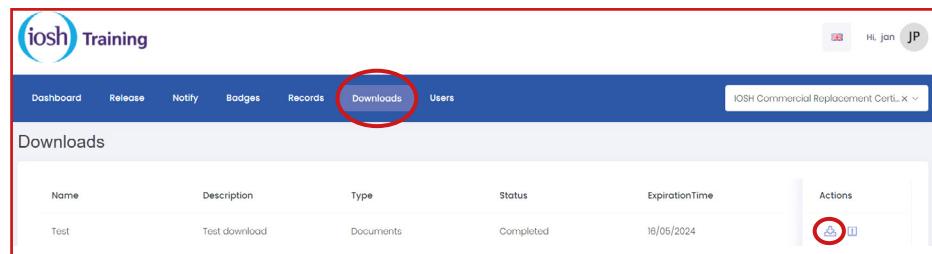
The following notice will show on screen. Click 'OK' to remove the notice.

Once processed, a notification will be sent to your advanced administrator email account to say that your download is available in the portal.



When ready, your download will become available in the 'Downloads' tab, which you can find on the top navigation bar in the portal. Once you can see your export in the list, click the download icon under 'Actions' next to the record. This will bulk download records as a ZIP file to your desktop.

Downloads automatically expire after 12 hours. You can re-download at any time.



Name	Description	Type	Status	ExpirationTime	Actions
Test	Test download	Documents	Completed	16/05/2024	

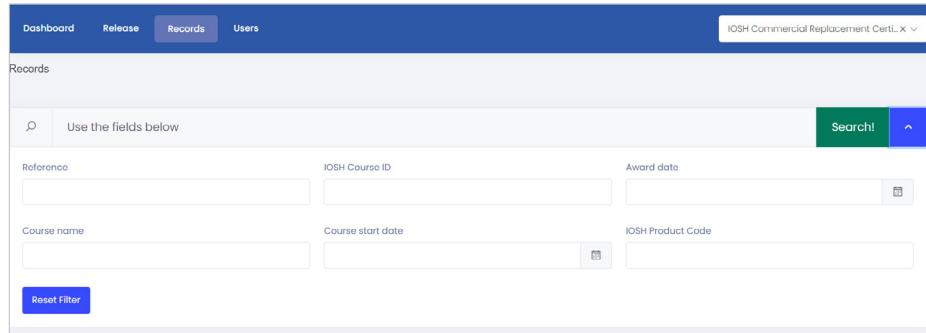
7 Search delegate digital documents

You can search for delegate records using the following features:

Records

All delegate and document records available on your portal can be searched and filtered by selecting 'Records' in the top navigation bar.

Click the cog icon next to the 'Search' button to reveal the advanced search fields.



The screenshot shows a search interface with the following fields:

- Reference: A text input field.
- IOSH Course ID: A text input field.
- Award date: A date picker input field.
- Course name: A text input field.
- Course start date: A date picker input field.
- IOSH Product Code: A text input field.

At the bottom left is a 'Reset Filter' button, and at the top right is a 'Search!' button.

Search field references

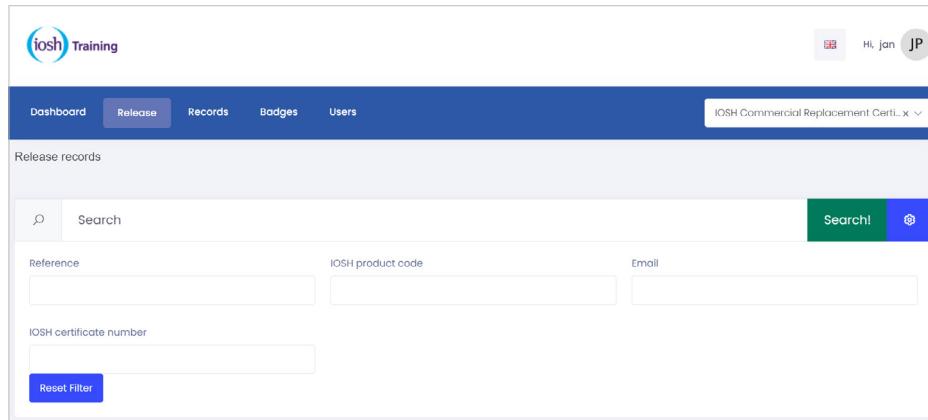
Reference	Unique record reference. Usually a mixture of numbers and letters, separated by dashes (eg 38211060-01-2VGN).
IOSH Course ID	Your unique six or seven-digit course reference number, provided when you register your course on the Training Provider Portal (TPP).
Award date	Date the delegate was awarded their certificate.
Course name	Title of the training course the delegate is registered on.
Course start date	The start date of the training course the delegate is registered on.
IOSH product code	The IOSH course reference code (between two and six letters, usually an acronym of the course title, eg: MS= Managing Safely®).

Enter relevant details into the search fields and select the 'Search!' button to bring up results. To reset the filter, select 'Reset filter'.

Release

Records waiting to be released to delegates can be searched and filtered by selecting 'Release' in the top navigation bar.

Click the cog icon next to the 'Search' button to reveal the advanced search fields.



The screenshot shows the 'Release' search interface. The top navigation bar has tabs for 'Dashboard', 'Release' (which is highlighted in blue), 'Records', 'Badges', and 'Users'. A dropdown menu shows 'IOSH Commercial Replacement Certi...' with a 'x' button. The main area is titled 'Release records' and contains a search bar with a magnifying glass icon and the word 'Search'. Below the search bar are four input fields: 'Reference', 'IOSH product code', 'Email', and 'IOSH certificate number'. At the bottom left is a blue 'Reset Filter' button.

Search fields

Reference	Unique record reference. Usually a mixture of numbers and letters, separated by dashes (eg 38211060-01-2VGN).
IOSH Course ID	Your unique six or seven-digit course reference number, provided when you register your course on the Training Provider Portal (TPP).
Email	Email address of the delegate.
IOSH certificate number	Unique IOSH certificate number (printed on the certificate).

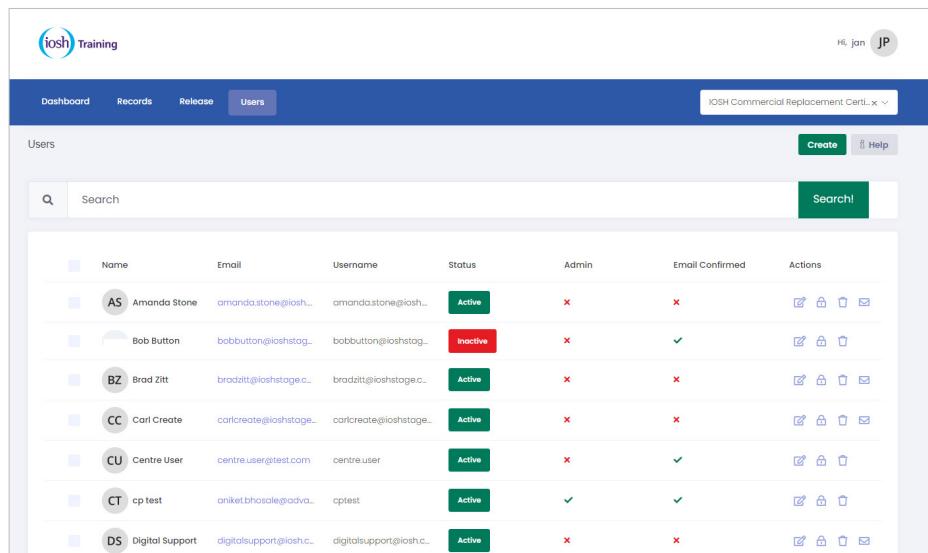
Enter relevant details into the search fields and select the 'Search!' button to bring up results. To reset, select the 'Reset filter' button.

8 Manage user accounts

You can manage the accounts of other admin users within your organisation, including making edits to existing records, deleting records and creating new records.

Please note: you do not have permission to create, edit or delete delegate records or advanced administrator records. Contact digitalsupport@iosh.com for help on this.

Select 'Users' in the top navigation bar.



Name	Email	Username	Status	Admin	Email Confirmed	Actions
AS Amanda Stone	amanda.stone@iosh...	amanda.stone@iosh...	Active	x	x	   
Bob Button	bobbutton@ioshstage...	bobbutton@ioshstage...	Inactive	x	✓	  
BZ Brad Zitt	bradzitt@ioshstage.c...	bradzitt@ioshstage.c...	Active	x	x	  
CC Carl Create	carlcreate@ioshstage...	carlcreate@ioshstage...	Active	x	x	  
CU Centre User	centre.user@test.com	centre.user	Active	x	✓	  
CT cp test	oniket.bhosale@adv...	cptest	Active	✓	✓	  
DS Digital Support	digitalsupport@iosh...	digitalsupport@iosh...	Active	x	x	  

Select 'All' from the drop-down list to show all users within your organisation.

Select 'Locked' from the drop-down list to filter users whose accounts have been locked by an admin from your organisation.

Select 'Deleted' from the drop-down list to filter users whose accounts have been deleted from your organisation.

Each user record displays the user's registered name, email address, username and status. Next to each user record you will see a list of 'Actions' as below:

	Edit user details
	Lock user account
	Delete user
	Re-send registration email. This will only show next to users who haven't yet verified their email address.

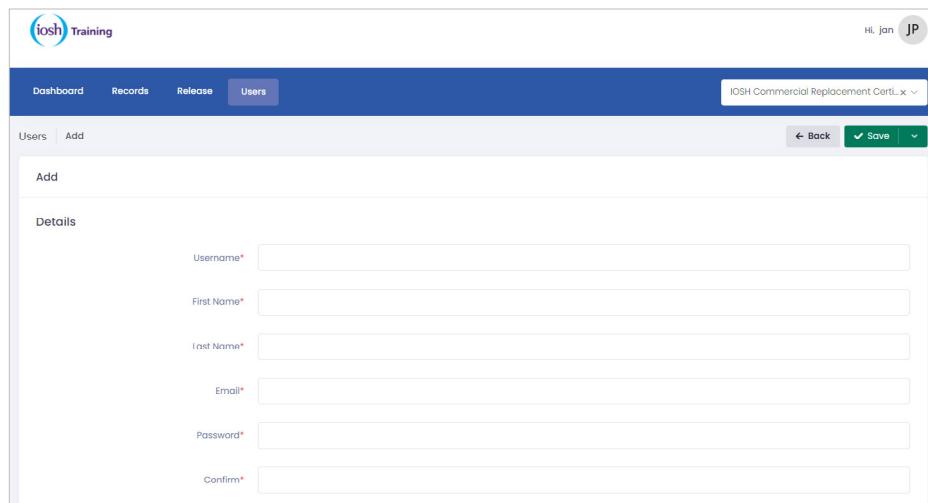
It is also possible to search for user records using the search bar at the top of the screen. Use any relevant search term to start a search.

Creating a new user

Select 'Create' at the top right of the screen to add a new standard administrator user.

This will bring up a form. Input the user's details, including the email address you would like to register them with.

Issue the user with a username and temporary password, and press 'Save'.



The screenshot shows the 'Users' section of the IOSH Training digital portal. A sub-menu 'Add' is selected. The form is titled 'Add' and contains fields for 'Details': 'Username*', 'First Name*', 'Last Name*', 'Email*', 'Password*', and 'Confirm*'. Each field has a red asterisk indicating it is required. At the bottom right of the form is a 'Save' button with a checkmark icon. The top navigation bar includes 'Dashboard', 'Records', 'Release', and 'Users'.

Once the new user account is created, an email will be sent to the user asking them to verify their email address. The user will need to click the link in order to access their account for the first time.

Once the new user has accessed the portal, they will be able to update their password and other details from their profile page. Refer the user to the 'IOSH digital portal guide for standard administrators' to use the portal.

Email the user separately with their temporary login details. They will need these in order to change their password, or to log in to the portal again if they choose to log out before updating their password.

Please note: Trainers will not automatically be given access to the digital portal. Should you wish for your trainer to have access, you can create a new standard administrator user account for them. Only IOSH-approved trainers registered to deliver courses on behalf of your company are permitted to be added as users.

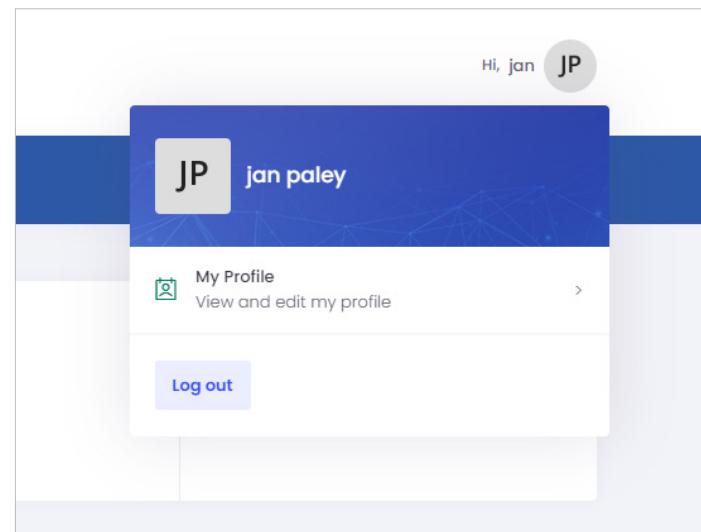
9 Digital document verification

Digital certificates can be verified by scanning the QR code on the certificate with a smart phone camera. A window will open to confirm the validity of the document with IOSH, date of issue and delegate name.



10 Log out

Log out by selecting the grey profile icon at the top right of the screen and clicking 'Log out', which will appear on the left under 'My Profile'.



About IOSH

The Institution of Occupational Safety and Health (IOSH) is a global Chartered body. The largest membership organisation for health and safety professionals worldwide. We connect our members with resources, guidance, events, and training, and we're the voice of our profession, campaigning on issues that affect millions of working people.

As a qualifications Awarding Organisation, a developer of training, and an advocate for positive transformation, we seek to build excellence in our profession, drive action from everyone who can influence occupational safety and health standards and ensure that protecting people is at the heart of sustainability.

IOSH was founded in 1945 and is a registered charity with international NGO status.

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-  facebook.com/IOSHofficial
-  linkedin.com/company/iosh
-  youtube.com/IOSHchannel
-  instagram.com/ioshofficial
-  tiktok.com/@ioshofficial

About IOSH Training

IOSH Training is the specialist learning delivery arm of IOSH Services Limited (ISL). ISL is a separate commercial entity that invests for the future, generating a surplus which is fully gift-aided to fund IOSH charitable activities.

ISL activities are aligned to IOSH's charitable objects, providing training, education and consultancy support services to organisations and individuals seeking to enhance their knowledge and competence in OSH.

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Institution of Occupational Safety and Health

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