

# IOSH digital portal user guide for standard 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.**

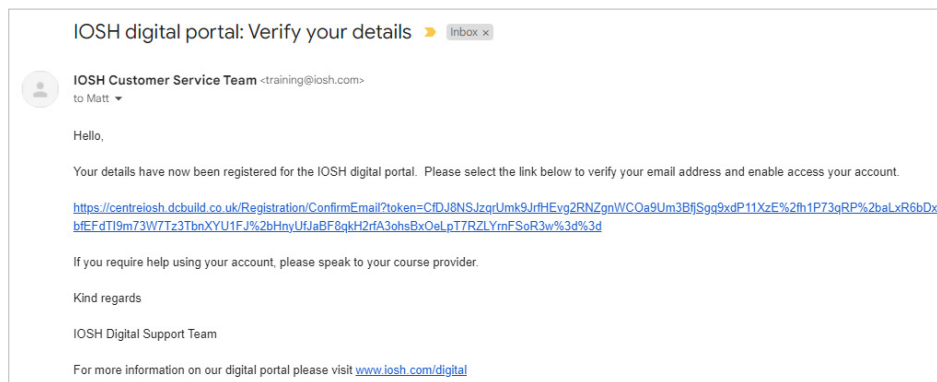
**Features:**

- Issue digital IOSH course workbooks to delegates.
- 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.

**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 verify your email address and sign in to the IOSH training provider digital portal. Click the link in the email to reach the log in screen for the portal.



Your account creator will have issued you with a temporary user name and password. Use these on the log in screen if you aren't taken directly to the portal dashboard on verifying your email address.

You will then be able to update your password from your profile later.

### Forgotten password

If you forget your password in future, use the forgotten password link on the log in screen and follow the password reset instructions.

**Please note:** you must have the email address you registered with in order to reset your password.

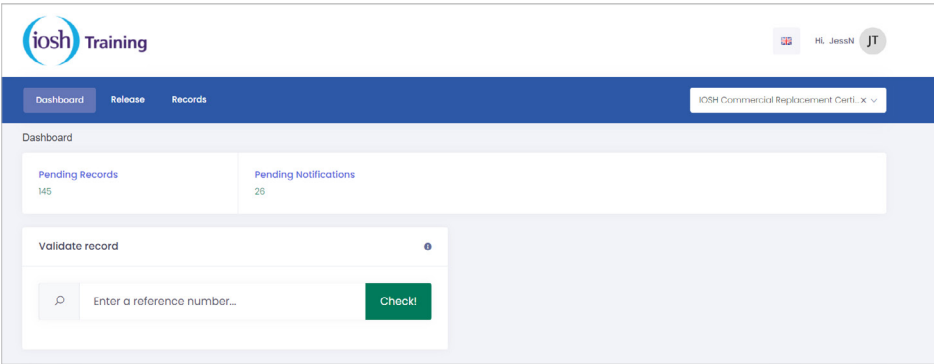
The login screen has a title 'Log in'. It contains two input fields: 'email address' with an envelope icon and 'password' with a lock icon. Below these fields is a link 'Forgot my password' circled in pink. At the bottom is a blue button labeled 'Log in'.

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.

# 3 Dashboard

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

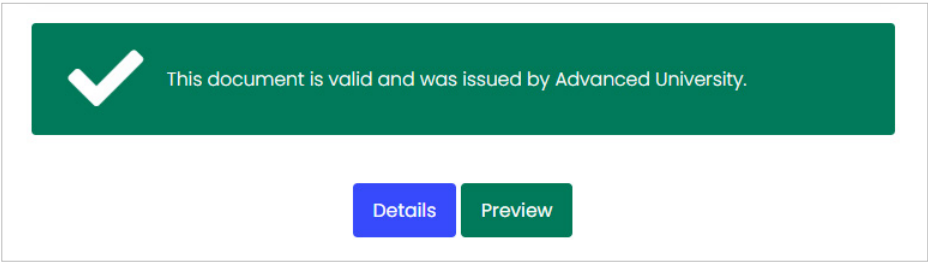


Dashboard	Your current view. Navigate back to the main dashboard at any time using this link in the navigation ribbon.
Records	Search, view and manage delegate records.
Release	Search, view and release delegate digital documents.
Toggle between centres	If you work for more than one IOSH training provider, 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

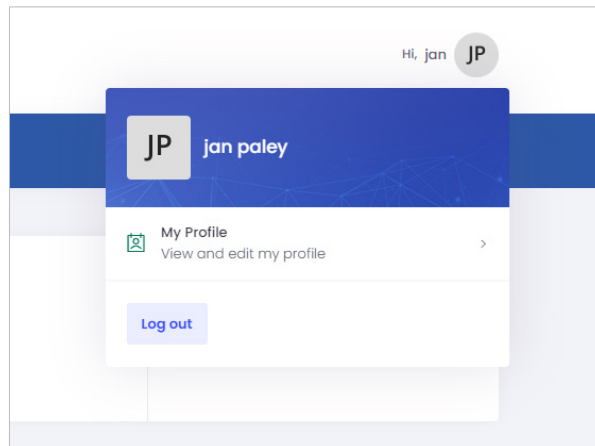
Check if a certificate is valid by adding the certificate reference number (printed on the certificate next to the IOSH certificate number) to the 'Validate record' field on your dashboard.

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 'My Profile' page. On the left, there is a profile card with the initials 'JP' and the name 'jan paley'. Below the card are two buttons: 'Personal Details' (highlighted in blue) and 'Change Password'. The main area of the page is titled 'Personal Details' and contains a form with the following fields: 'First Name\*' (filled with 'jan'), 'Middle name' (empty), 'Last Name\*' (filled with 'paley'), 'User Name\*' (filled with 'janpaley'), 'Phone number' (empty), and 'Email address\*' (filled with 'janpaley@iooshstage.co.uk'). A green 'Save' button is at the bottom right of the form.

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 'My Profile' page with the 'Change Password' button highlighted in blue. The main area is titled 'Password' and contains a form with three fields: 'Current password\*', 'New password\*', and 'Confirm password\*'. A green 'Save' button is at the bottom right of the form.

# 5 Issue digital documents to delegates

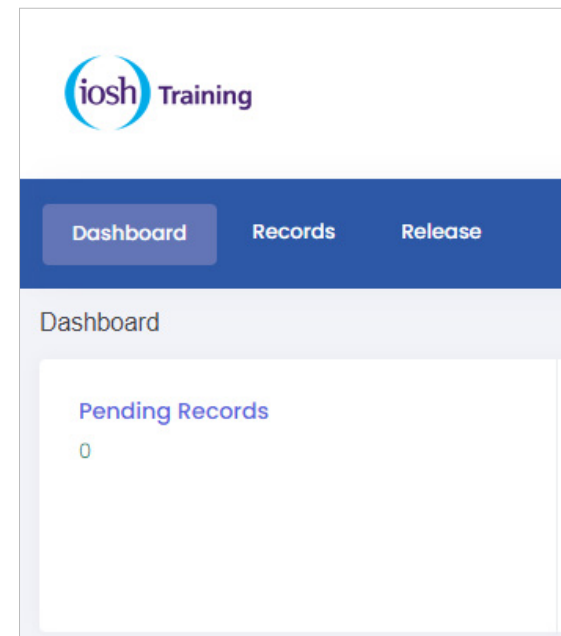
When a delegate is first registered onto a training course in the IOSH Training Provider Portal (TPP) and a digital workbook has been selected for them, they will be automatically issued with their workbook, and an email will be sent to them prompting them to register on the digital portal in order to 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](mailto: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.

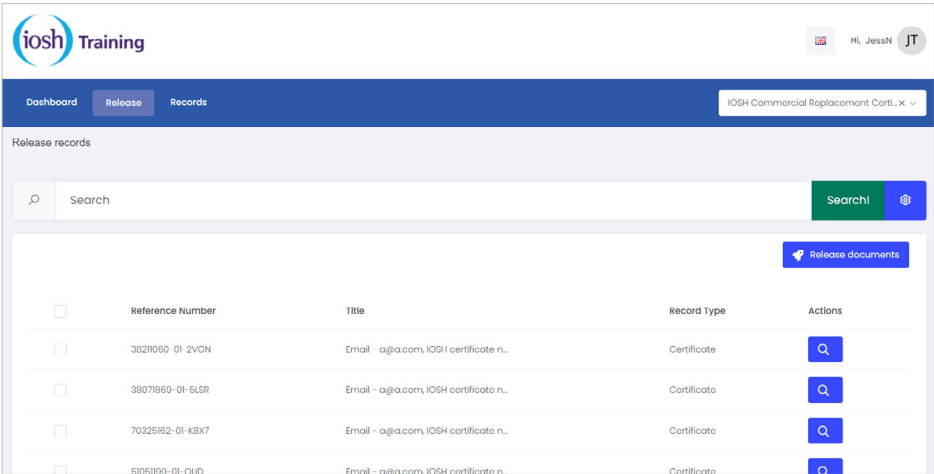
You'll see the number of documents which are pending release on the main dashboard.



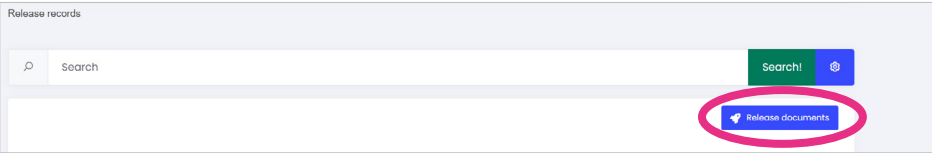
To release certificates, select 'Release' on the top navigation bar or click the 'Pending Records' link.

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

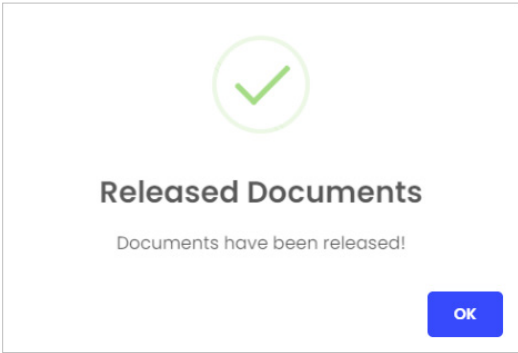
‘Select all’ or select the individuals you would like to issue documents to by checking the box to the left of each record.



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



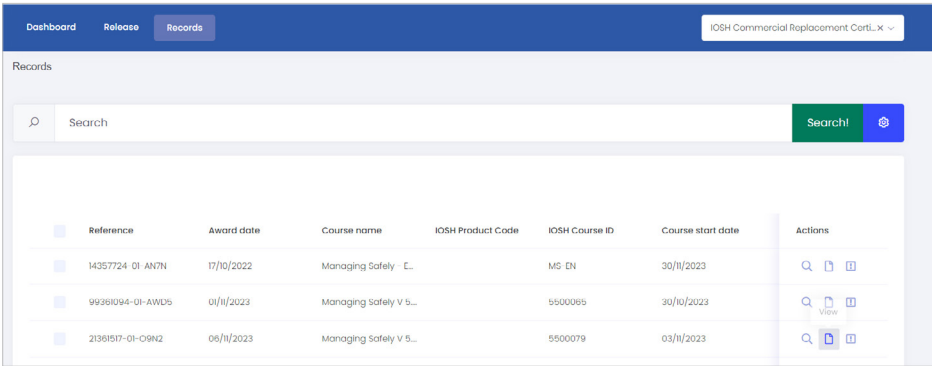
When your documents have been successfully released you will receive the below onscreen message.





# 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.



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:

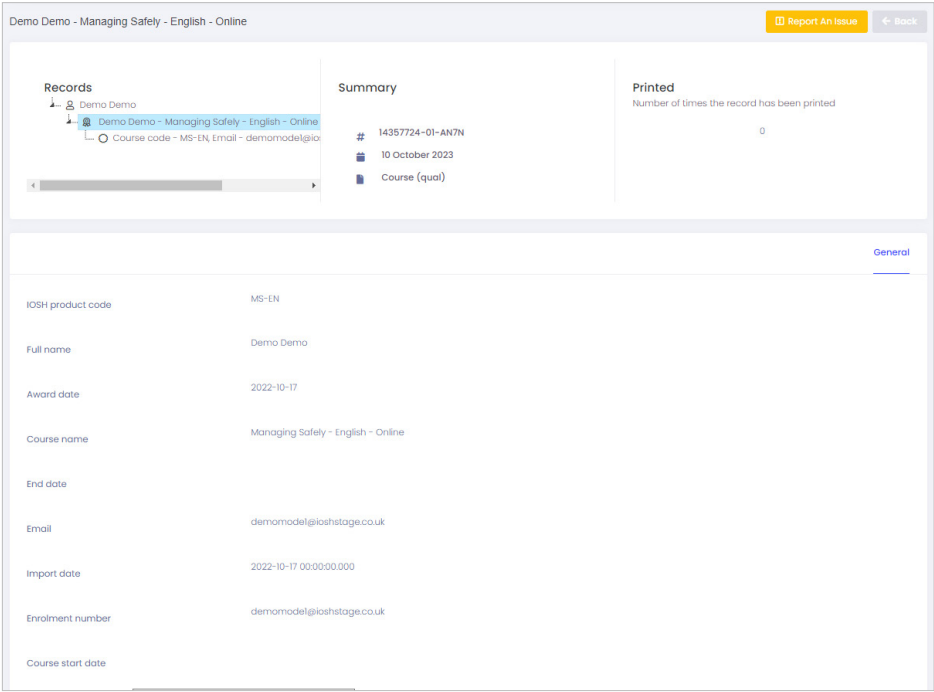
Reference	Unique record reference. Usually a mixture of numbers and letters, separated by dashes (eg 38211060-01-2VGN).
Award date	Date the delegate was awarded their certificate.
Course name	Title of the training course the delegate is registered on.
IOSH product code	The IOSH course reference code (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.














**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](mailto:digitalsupport@iosh.com).

## View, download and print digital workbooks and 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"> <li>• 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.</li> <li>• Page orientation. Rotates the page clockwise or anti-clockwise by 90 degrees.</li> <li>• Page layout. You can choose if your document is displayed one page at a time or as a double page.</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 document.
	This icon displays different settings for the workbook. Available options include: <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 and save. Click this icon to save your document to a local folder.</li> <li> Print. Click this icon to activate the print screen. The print screen will open in your browser.</li> </ul>
	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'. 

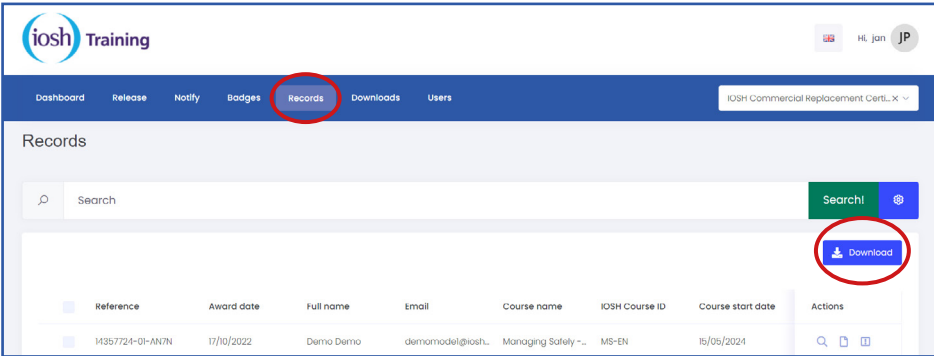
Complete the form and press 'send'. This will send an email to the IOSH digital support team who will be in touch as soon as possible to help resolve this.

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.

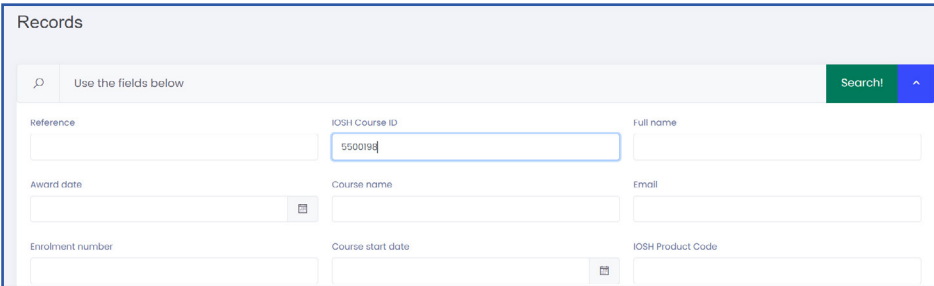
Find the bulk download feature by clicking on the 'Records' tab in the top navigation bar.

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

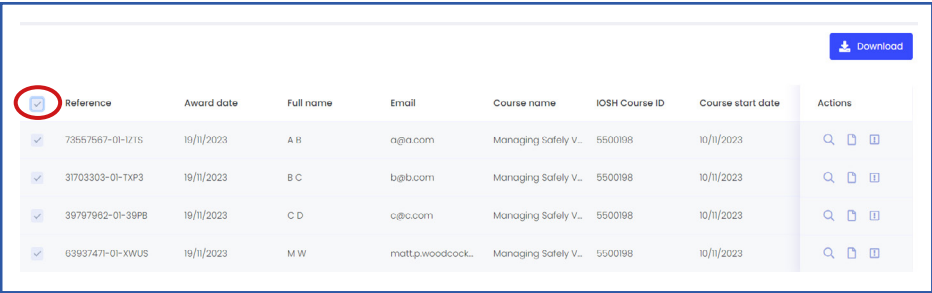


Select the records you would like to download. Filter using the advanced search fields. (Click the cog icon next to the search bar to reveal the advanced search fields if they don't show straight away.)

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



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).



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'.

Export Documents

Download Name

Test

Description

Test download

☒ Certificate

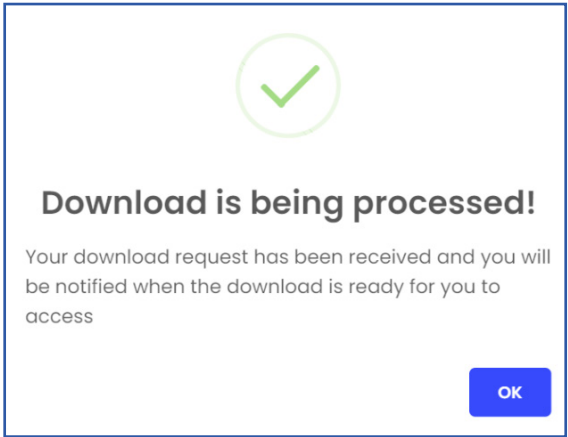
☐ Workbook

Cancel

Download

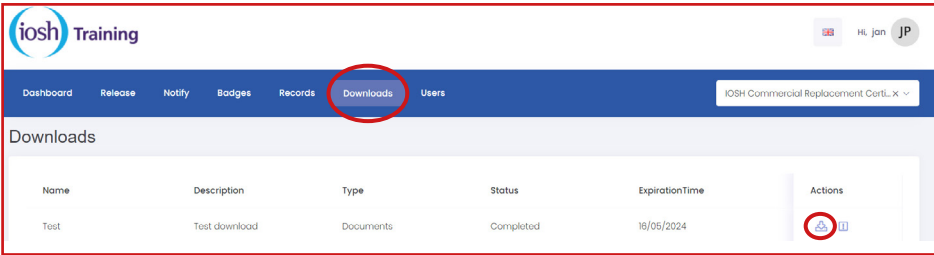
The following notice will show on screen. Click 'OK' to remove the notice.

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.



# 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.

### Search field references

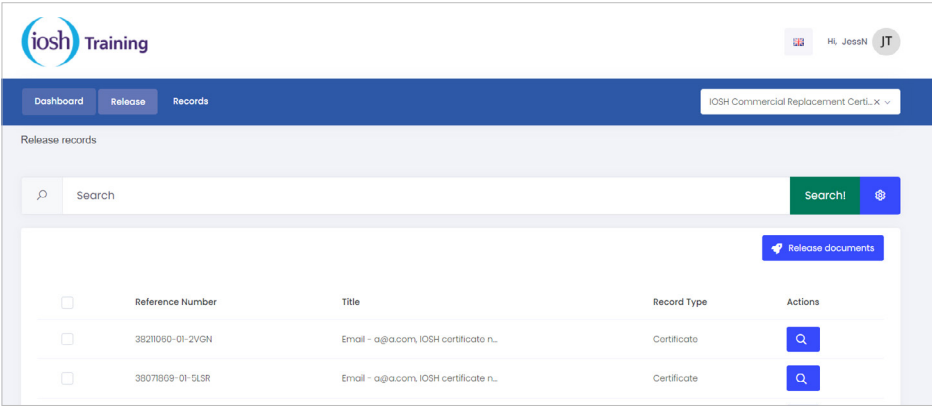
Reference	Unique record reference. Usually a mixture of numbers and letters, separated by dashes (eg 38211060-01-2VGN).
IOSH Course ID	Your unique six or seven-digit course reference number, provided when you register your course on the Training Provider Portal (TPP).
Award date	Date the delegate was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



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 Digital document verification

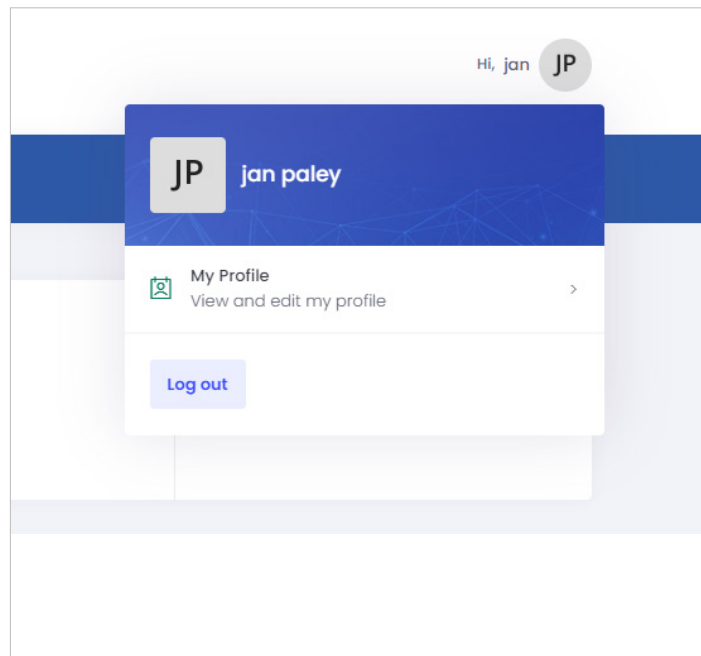
Digital certificates can be verified by scanning the QR code on the certificate with a smart phone camera. A window will open to confirm the validity of the document with IOSH, date of issue and delegate name.





# 9 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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 [youtube.com/IOSHchannel](https://youtube.com/IOSHchannel)  
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[digitalsupport@iosh.com](mailto:digitalsupport@iosh.com)

## 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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