IOSH digital portal user guide for third party connections

Contents

1 Introduction

The IOSH connections portal is for third parties who wish to view, download and print delegates' digital documents directly from our secure digital system.

Features:

- Connect with delegates who have attended IOSH training courses
- View, download and print delegates' digital documents
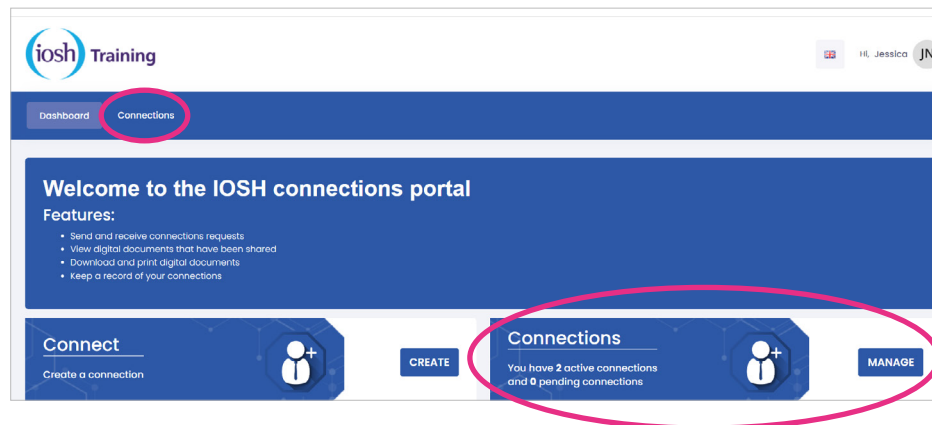- Keep a log of documents shared

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.

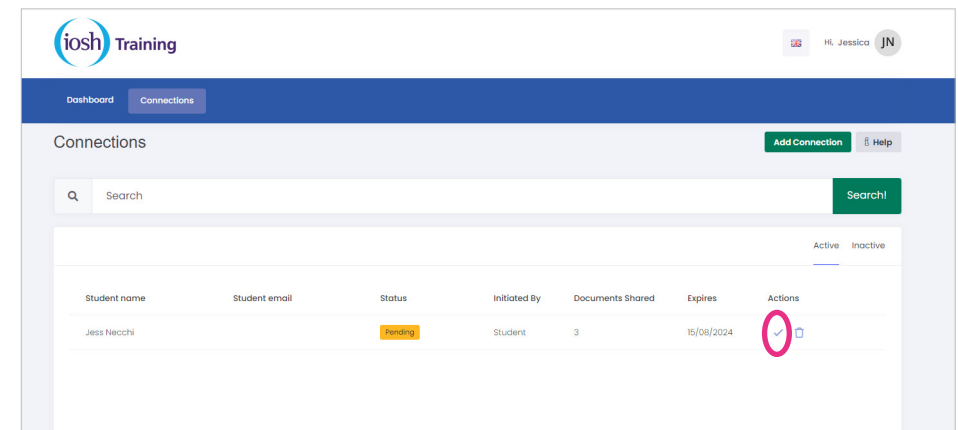# 2 Receive a delegate connection request and access their digital documents

When a delegate on an IOSH training course wants to connect with you and share their digital documents, you'll receive a document viewing request email from IOSH Digital Support that includes a link to register for the IOSH connections portal.

Follow the link and complete the registration steps. Once you've created your account, you'll be able to log in and preview your connections from your dashboard.

Click the 'Connections' tile to view all your connections. Or navigate to the 'Connections' tab at the top of the screen.
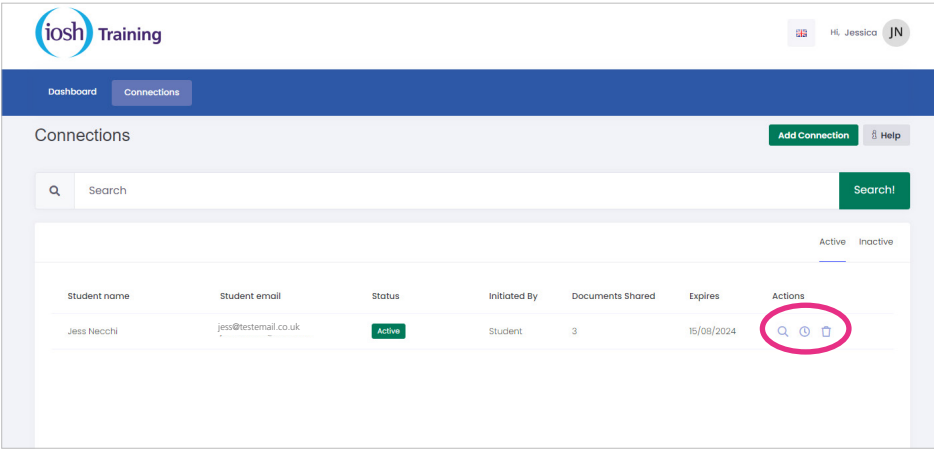

From here, you'll be able to view all delegates who have connected with you. To be able to view a delegate's document(s), click the tick next to the pending record entry. This will make them an active connection.
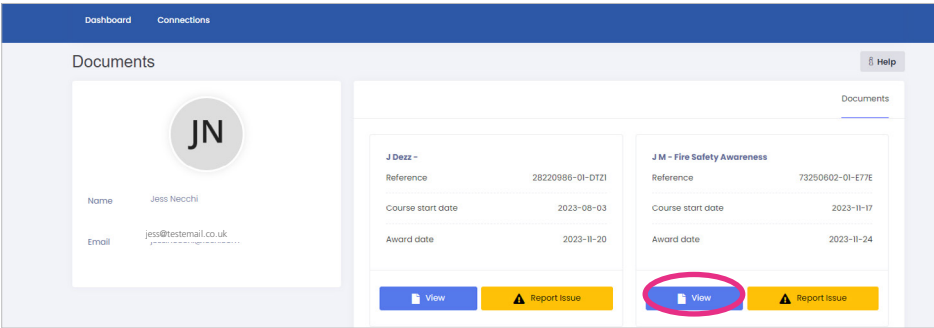
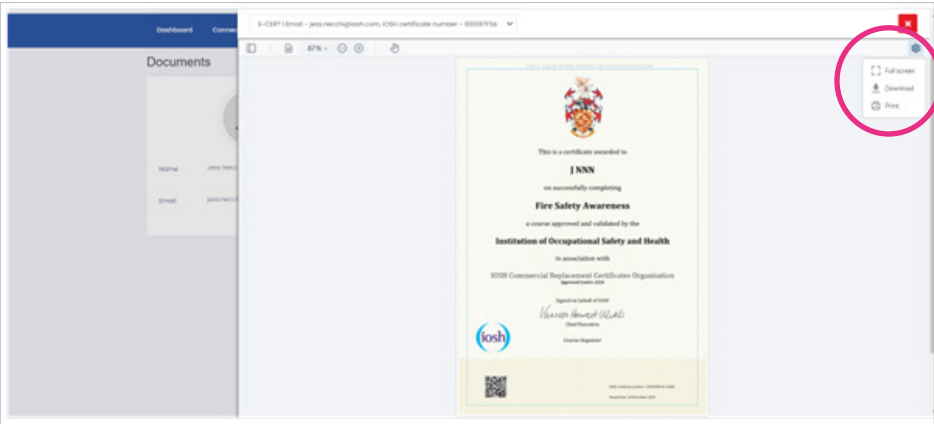Next to each active connection are a series of 'Actions':

🔍	View, download and print digital documents
🕐	Send a connection extension request
🗑	Cancel the connection

On clicking the magnifying glass icon, you'll be taken to a document record page, which shows all documents shared by that particular delegate. Click 'View' to open a particular document.
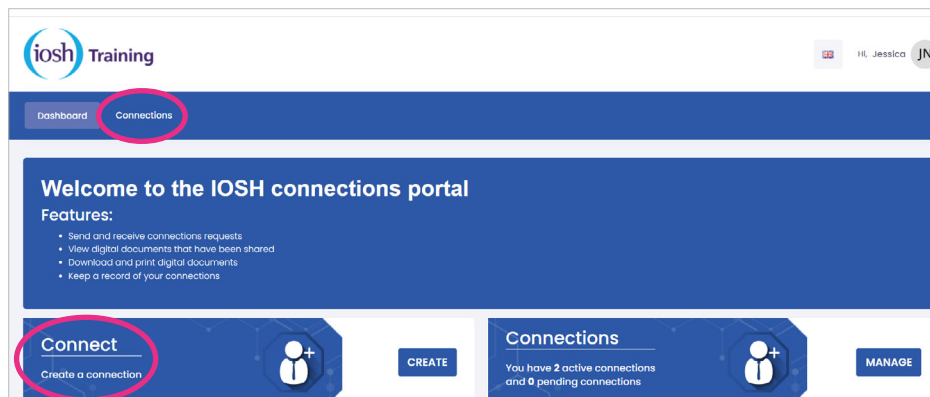

The document will open in a separate secure window called DocViewer. From here, you can download and print one copy of a digital certificate. Digital workbooks cannot be downloaded or printed. To download or print, use the drop down by clicking the cog icon to right hand side of the window.

3 Send a connection request to view a delegate's digital documents

Third parties can send connection requests to delegates and ask to view delegates' digital documents via the connections portal.
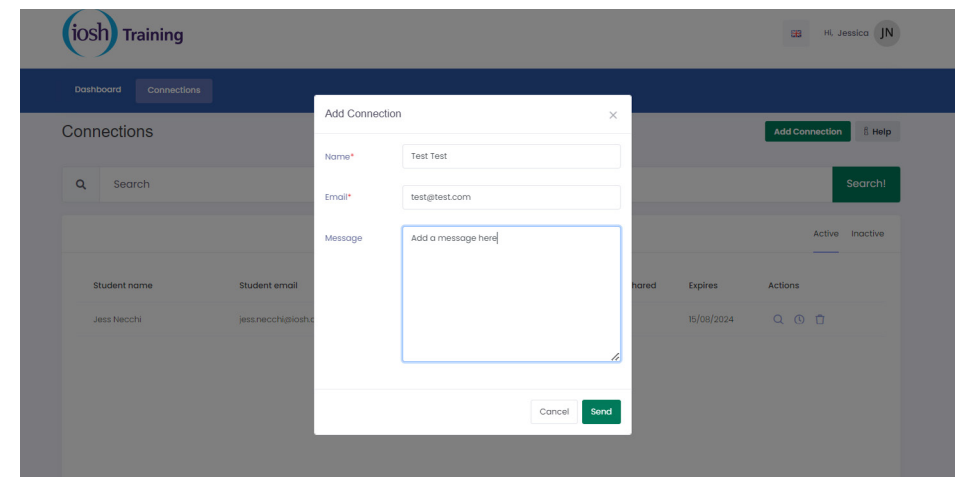
To send a connection request to a delegate, log in to your connections portal account, navigate to the 'Connect' tile on your dashboard and click 'Create'.
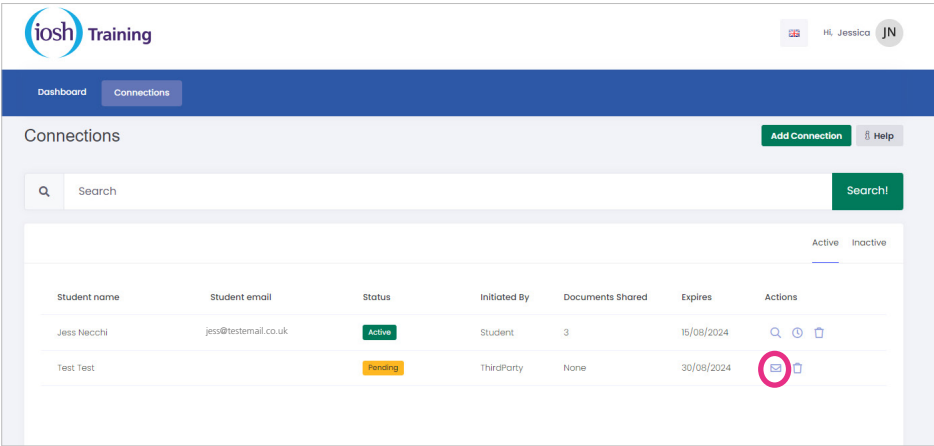

A dialogue box will appear where you need to enter the delegate name and email address. The email address needs to match the one that the delegate registered with on the IOSH digital portal. You can also add an optional email message.

Click 'Send'.

A notification will be sent to the email address you entered for the delegate.

Once your request has been sent, the delegate will show up in your connections list as 'Pending.' When they accept your request, their status will change to 'Active'. You can re-send your connection request email at any time using the email icon under 'Actions'.

Once active, you will be able to view your connection's digital documents as per chapter 2 in this guide.
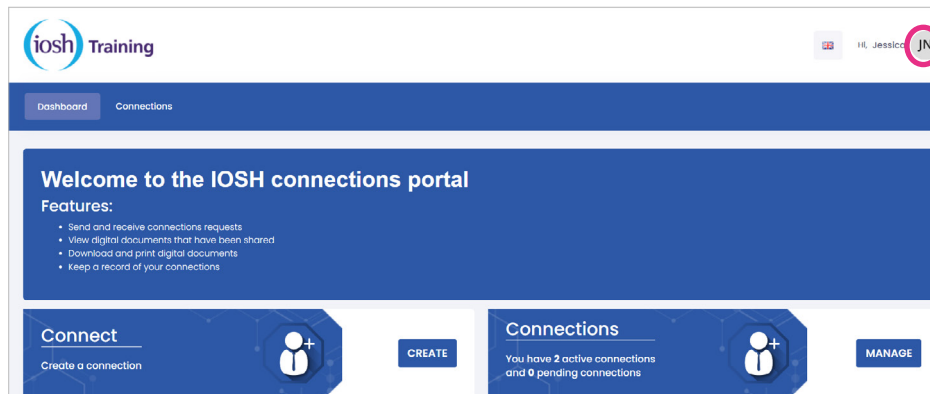
4 Expired or cancelled connections

When a connection expires or is cancelled, they automatically move to the 'Inactive' tab.
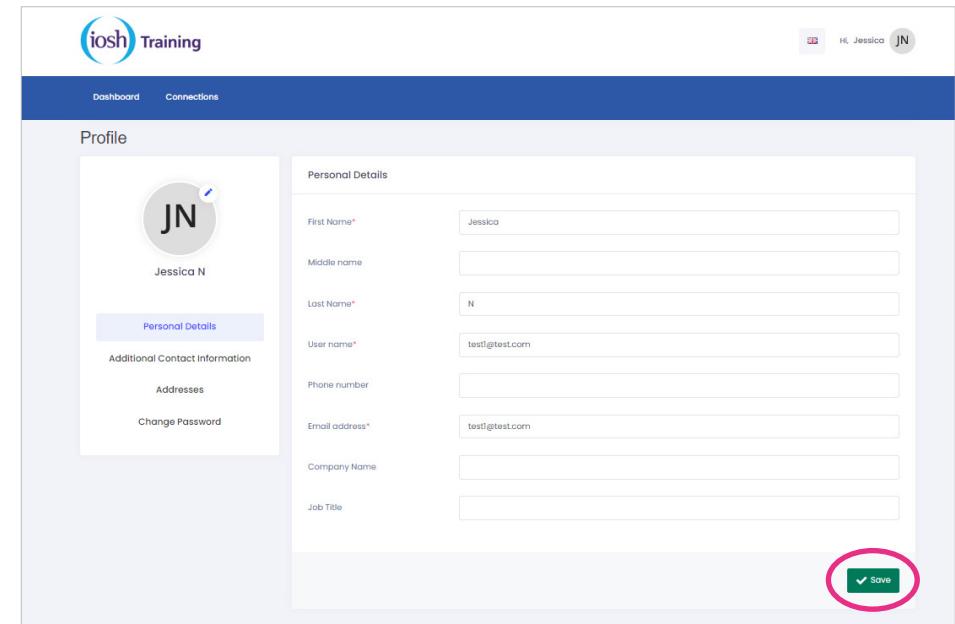

For expired connections, click the clock icon under 'Actions' to extend the connection. Cancelled connections need to be re-invited from scratch.

5 Manage your connections portal account

Manage your connections portal account by clicking your initials in the top right of the screen.

From here you can view and edit your personal details including name and email address. You can also update your password from your account. When making changes, remember to press 'Save' to implement them.

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.

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.

IOSH
The Grange
Highfield Drive
Wigston
Leicestershire
LE18 1NN
UK

+44 (0)116 350 0900
digitalsupport@iosh.com

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