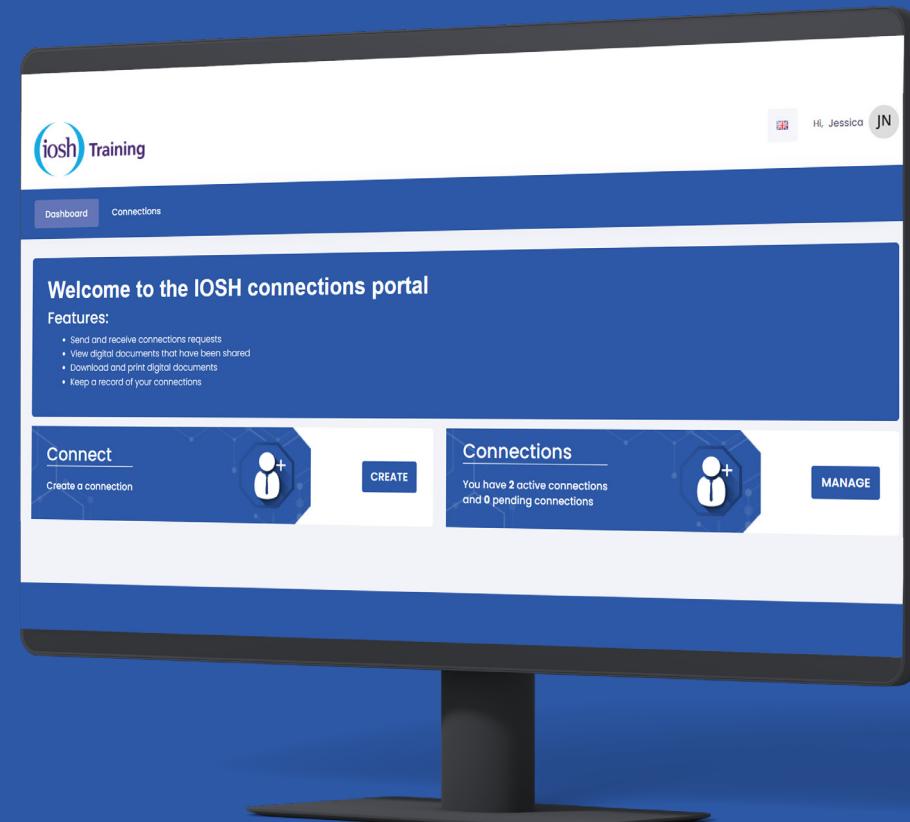


IOSH digital portal user guide for third party connections



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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

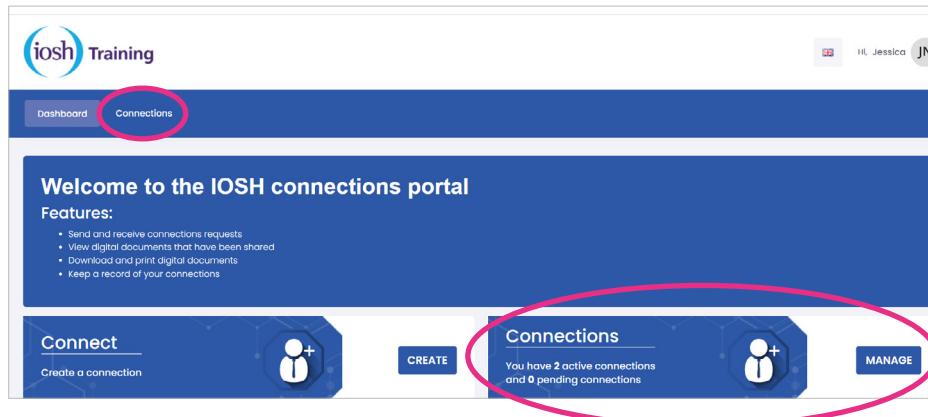
Please note: this user guide has been written for desktop access to the digital portal. If you are accessing on mobile, some screens may look a little different. Functionality remains the same.

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.



Dashboard **Connections**

Welcome to the IOSH connections portal

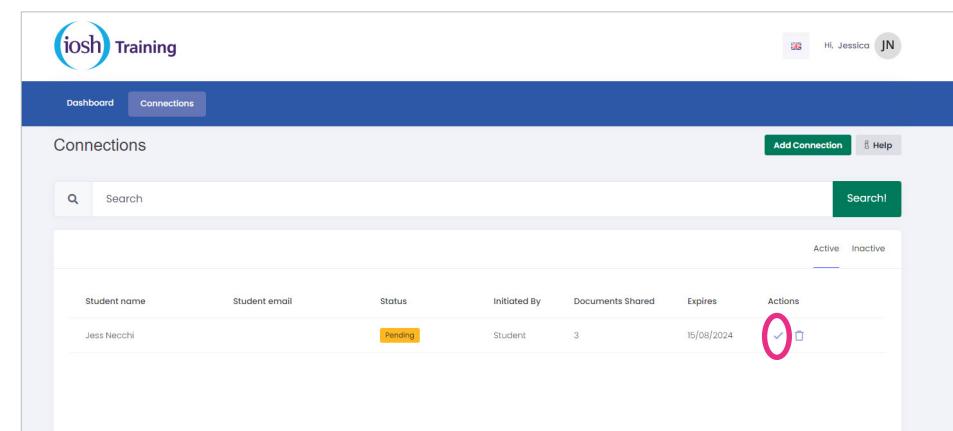
Features:

- Send and receive connections requests
- View digital documents that have been shared
- Download and print digital documents
- Keep a record of your connections

Connect **Create a connection**

CREATE **Connections** You have 2 active connections and 0 pending connections **MANAGE**

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.



iosh Training

Hi, Jessica JN

Dashboard **Connections**

Add Connection **Help**

Connections

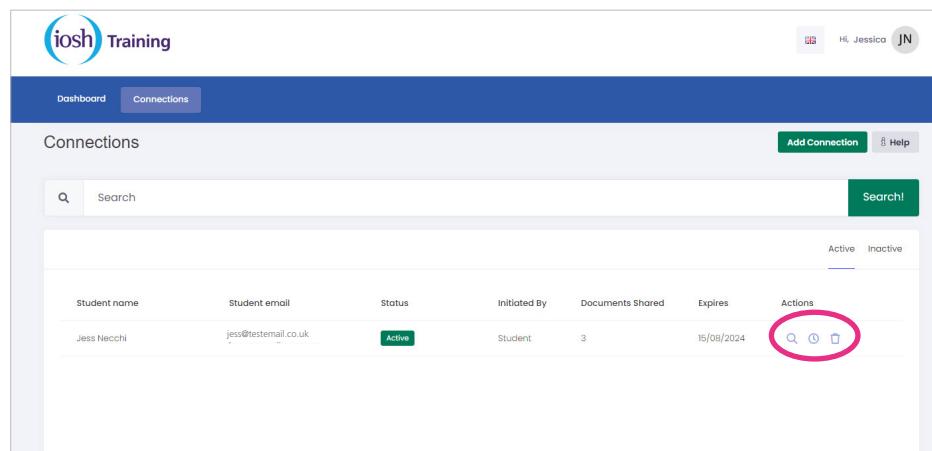
Search

Active Inactive

Student name	Student email	Status	Initiated By	Documents Shared	Expires	Actions
Jess Necchi		Pending	Student	3	15/08/2024	<input checked="" type="checkbox"/> 

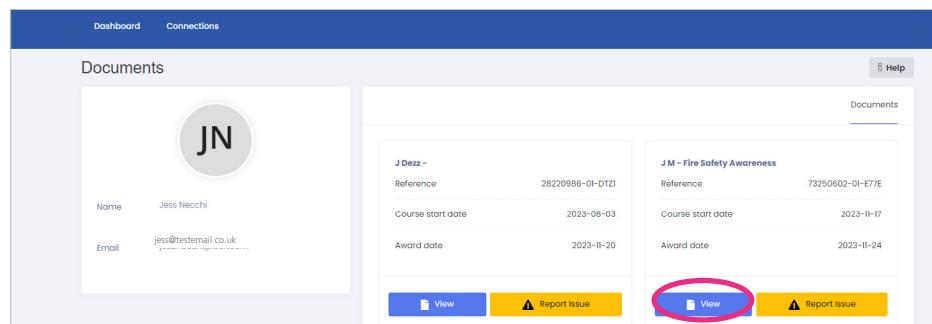
Next to each active connection are a series of 'Actions':

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



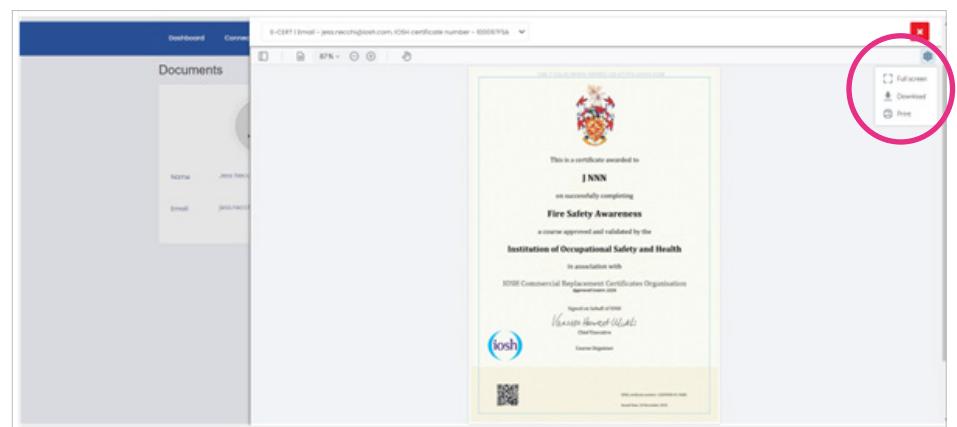
The screenshot shows the 'Connections' section of the iosh Training portal. It lists a single active connection for 'Jess Necchi' (jess@testemail.co.uk). The 'Actions' column for this connection includes a magnifying glass icon, which is highlighted with a red circle. Other actions shown are 'View', 'Report issue', and 'Delete'.

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 screenshot shows the 'Documents' section of the portal for 'Jess Necchi'. It displays two course records. For the first course, 'J Dezz - Reference 28220988-01-DT21', the 'View' button is circled in red. Other buttons shown are 'Report issue' and 'Delete'.

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.

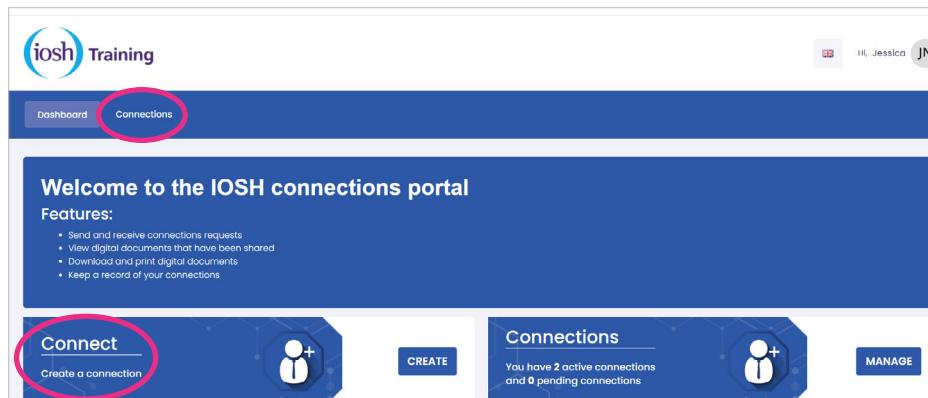


The screenshot shows a digital certificate for 'J NNN' in the DocViewer window. The certificate is for 'Fire Safety Awareness' and is issued by 'Institution of Occupational Safety and Health'. It includes a QR code and a signature. In the top right corner of the DocViewer window, there is a dropdown menu with 'Download' and 'Print' options, both of which are circled in red.

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.

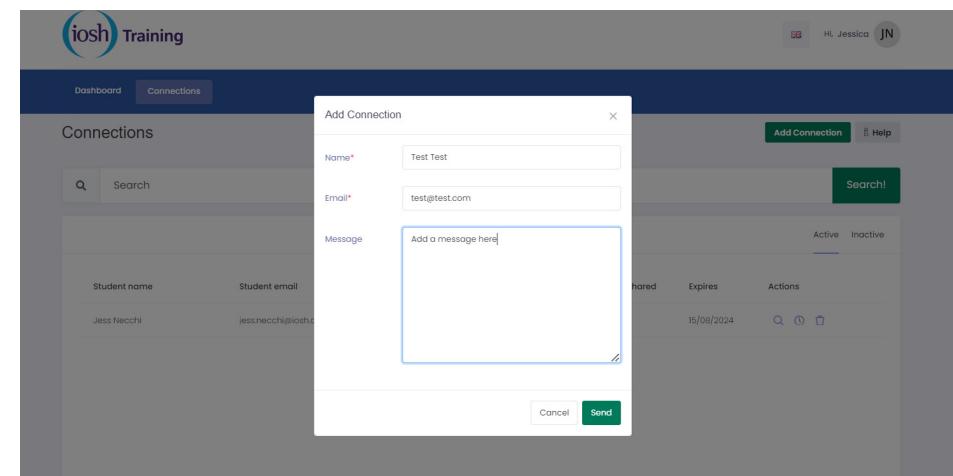
To send a connection request to a delegate, log in to your connections portal account, navigate to the 'Connect' tile on your dashboard and click 'Create'.



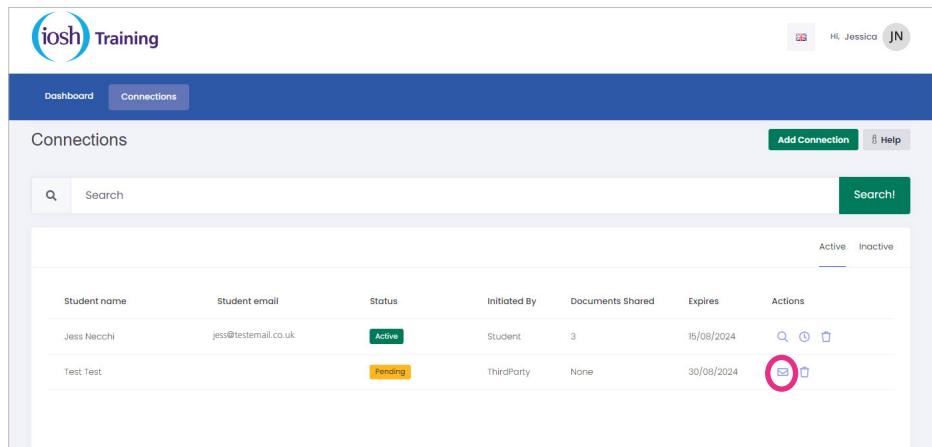
A dialogue box will appear where you need to enter the delegate name and email address. The email address needs to match the one that the delegate registered with on the IOSH digital portal. You can also add an optional email message.

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'.



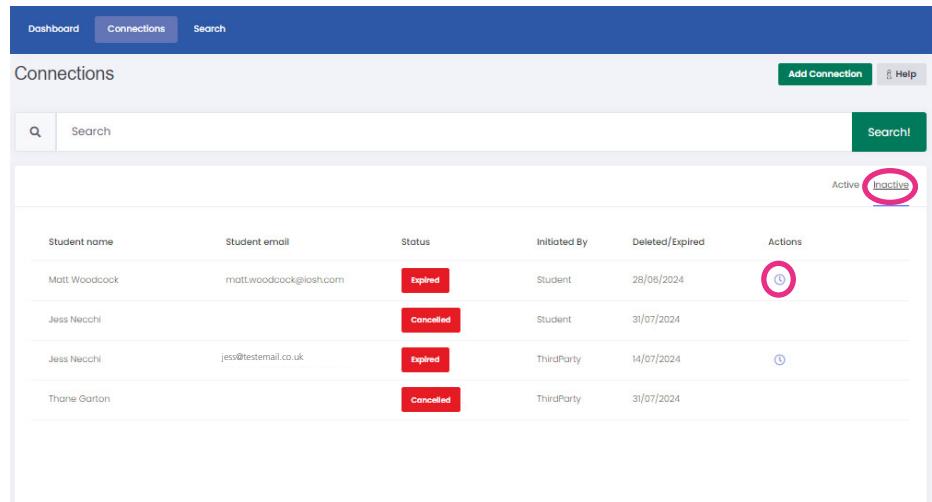
The screenshot shows the 'Connections' page of the IOSH digital portal. At the top, there are tabs for 'Dashboard' and 'Connections', with 'Connections' being the active tab. A 'Hi, Jessica JN' greeting is on the right. Below the tabs is a search bar with a 'Search!' button. A filter bar allows switching between 'Active' and 'Inactive' connections, with 'Active' selected. The main table lists connections with columns: Student name, Student email, Status, Initiated By, Documents Shared, Expires, and Actions. The first connection, 'Jess Nicchi', has an 'Active' status. The second connection, 'Test Test', has a 'Pending' status and is highlighted with a red circle around the 'Actions' column, which contains an envelope icon for re-sending the request.

Student name	Student email	Status	Initiated By	Documents Shared	Expires	Actions
Jess Nicchi	jes@testemail.co.uk	Active	Student	3	15/08/2024	  
Test Test		Pending	ThirdParty	None	30/08/2024	 

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.

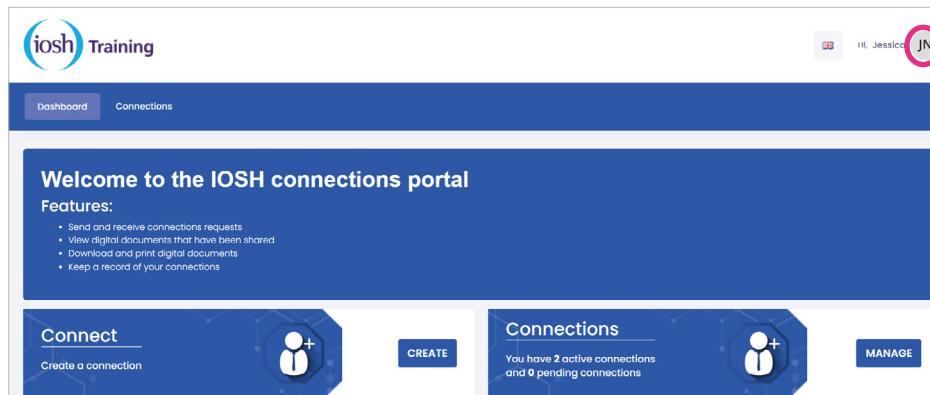


Student name	Student email	Status	Initiated By	Deleted/Expired	Actions
Matt Woodcock	matt.woodcock@iosh.com	Expired	Student	28/06/2024	
Jess Necchi		Cancelled	Student	31/07/2024	
Jess Necchi	jess@testemail.co.uk	Expired	ThirdParty	14/07/2024	
Thane Garton		Cancelled	ThirdParty	31/07/2024	

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.

A screenshot of the IOSH Connections portal profile edit screen. The top navigation bar shows 'Dashboard' and 'Connections'. The main content area is titled 'Profile'. On the left, there is a circular profile picture with 'JN' initials and the name 'Jessica N'. Below the profile picture, there are tabs for 'Personal Details', 'Additional Contact Information', 'Addresses', and 'Change Password'. The 'Personal Details' tab is selected. It contains fields for 'First Name*' (filled with 'Jessica'), 'Middle name' (empty), 'Last Name*' (filled with 'N'), 'User name*' (filled with 'test@test.com'), 'Phone number' (empty), 'Email address*' (filled with 'test@test.com'), 'Company Name' (empty), and 'Job Title' (empty). At the bottom right of the form, there is a green 'Save' button with a checkmark icon, which is circled in pink.

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.

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
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Institution of Occupational Safety and Health

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