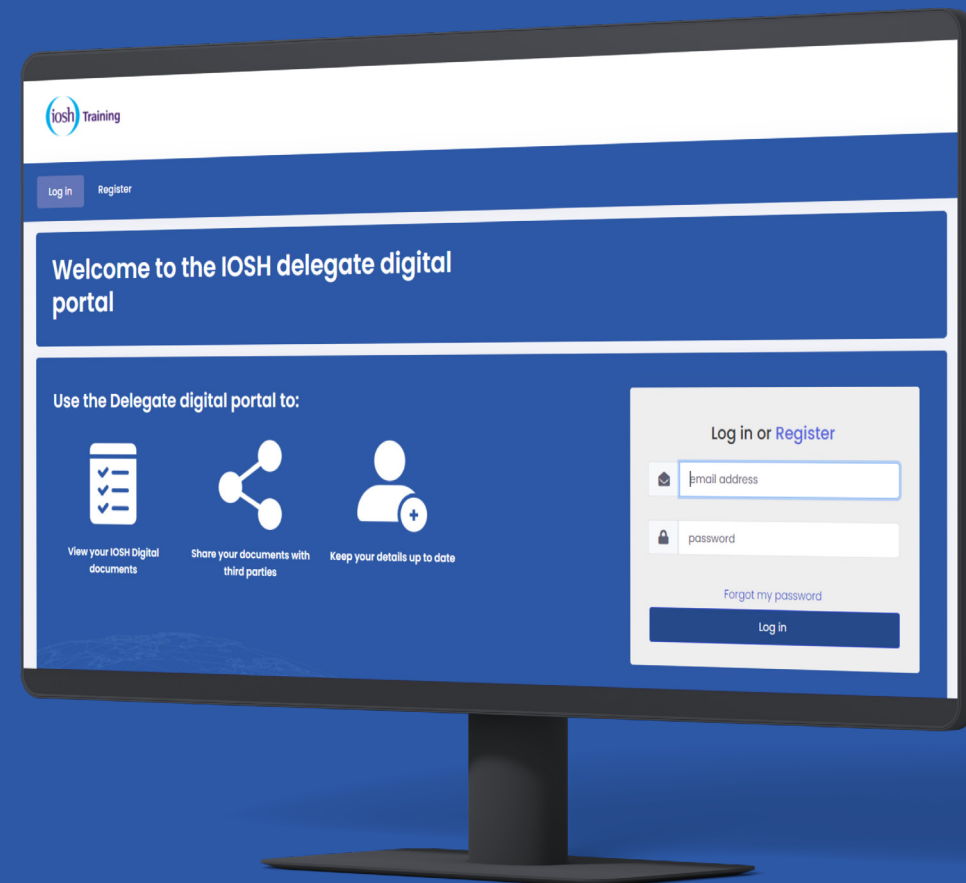


IOSH digital portal user guide for delegates



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1 Introduction

The IOSH delegate digital portal provides online access to your workbooks and certificates.

Features:

- Manage your account profile
- View and navigate digital workbooks online
- Download and print digital workbooks
- View, download and print digital certificates
- Verify digital certificates
- Share your digital documents

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 Register

You will receive an email containing a registration link for the digital portal. Follow the registration link to reach the portal home screen.

On the home screen, select 'Register'.

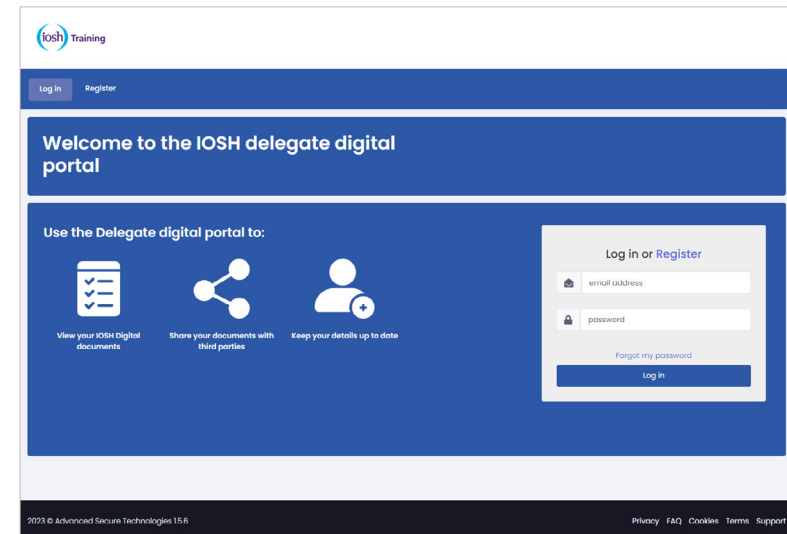
Please note: all details (email address and full name) must match the information your course provider has registered with us. If you are unsure, please contact your course provider directly to check these details.

Enter the email address that you received your registration request to and create a password.

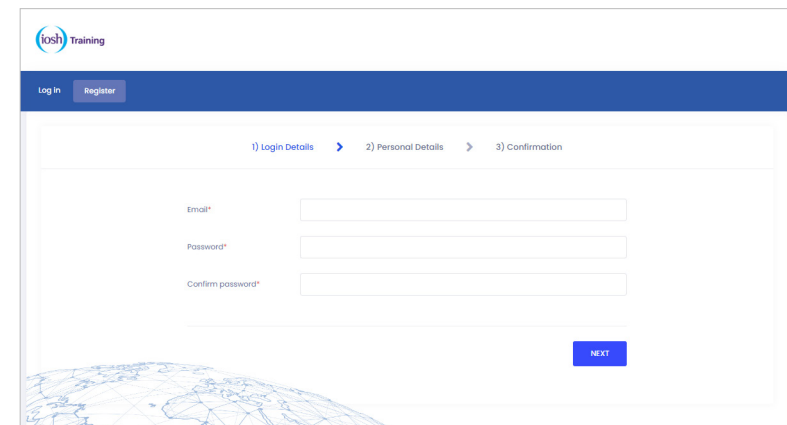
To be accepted, your password needs to be a minimum of nine characters and contain:

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

Re-enter the password in the 'Confirm password' field and select 'Next'.

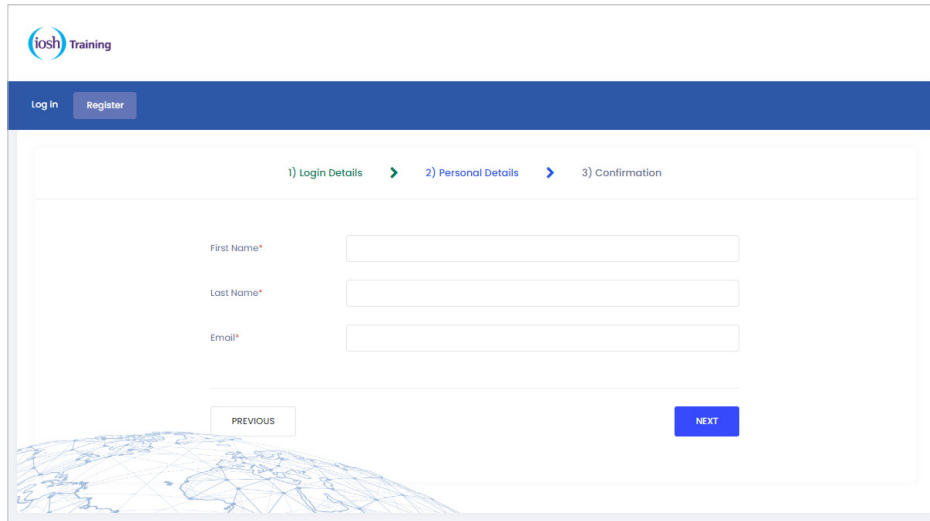


The screenshot shows the IOSH Training digital portal home screen. At the top, there is a blue header with the IOSH Training logo and a navigation bar with 'Log In' and 'Register' buttons. Below the header, a large blue banner reads 'Welcome to the IOSH delegate digital portal'. Underneath, a section titled 'Use the Delegate digital portal to:' features three icons: a checklist for 'View your IOSH Digital documents', a share icon for 'Share your documents with third parties', and a person icon for 'Keep your details up to date'. On the right side of this section is a 'Log in or Register' form with fields for 'email address' and 'password', a 'Forgot my password' link, and a 'Log in' button. The footer contains copyright information '© 2023 Advanced Secure Technologies Ltd' and links for 'Privacy', 'FAQ', 'Cookies', 'Terms', and 'Support'.



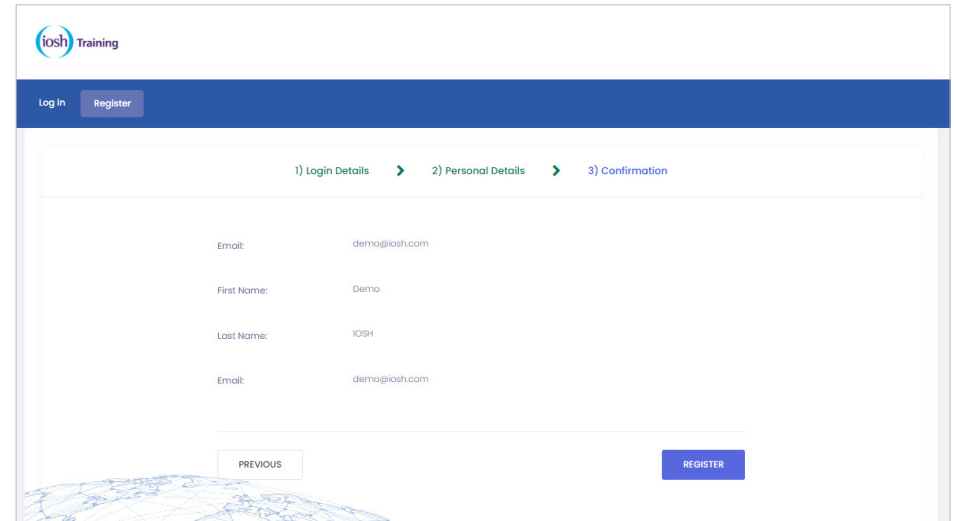
The screenshot shows the registration form on the IOSH Training digital portal. At the top, there is a blue header with the IOSH Training logo and a navigation bar with 'Log In' and 'Register' buttons. Below the header, a progress bar shows three steps: '1) Login Details', '2) Personal Details', and '3) Confirmation'. The main form area has three input fields: 'Email*', 'Password*', and 'Confirm password*'. A 'NEXT' button is located at the bottom right of the form. The background of the form area features a faint world map.

Enter your first name and last name, last name and email address. Select 'Next'.



The screenshot shows the IOSH Training registration interface. At the top, there is a blue header with the IOSH Training logo and a navigation bar with 'Log In' and 'Register' buttons. Below the header, a progress bar indicates the current step: '1) Login Details' (completed), '2) Personal Details' (active), and '3) Confirmation'. The main content area contains three input fields labeled 'First Name*', 'Last Name*', and 'Email*'. At the bottom, there are two buttons: 'PREVIOUS' and 'NEXT'. The background features a stylized blue wireframe map of the world.

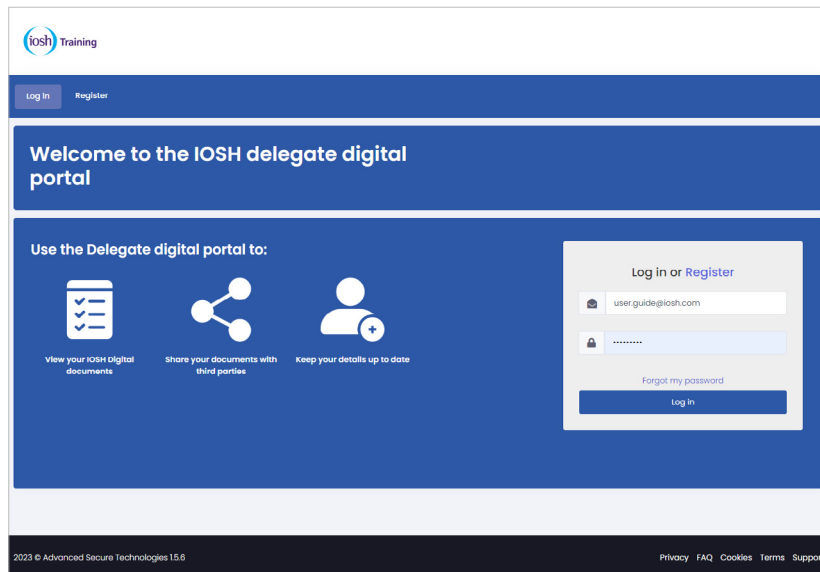
Check the details you have provided. To make changes select 'Previous' to return to any of the previous screens. If all information is correct, select 'Register'.



The screenshot shows the IOSH Training registration interface at the confirmation step. The header and progress bar are identical to the previous screen. The progress bar now shows '1) Login Details' (completed), '2) Personal Details' (completed), and '3) Confirmation' (active). The main content area displays the entered details: 'Email: demo@iosh.com', 'First Name: Demo', 'Last Name: IOSH', and 'Email: demo@iosh.com'. At the bottom, there are two buttons: 'PREVIOUS' and 'REGISTER'. The background features a stylized blue wireframe map of the world.

3 Log in

When registration is complete, return to the log in screen and enter your email address and password to access the portal.

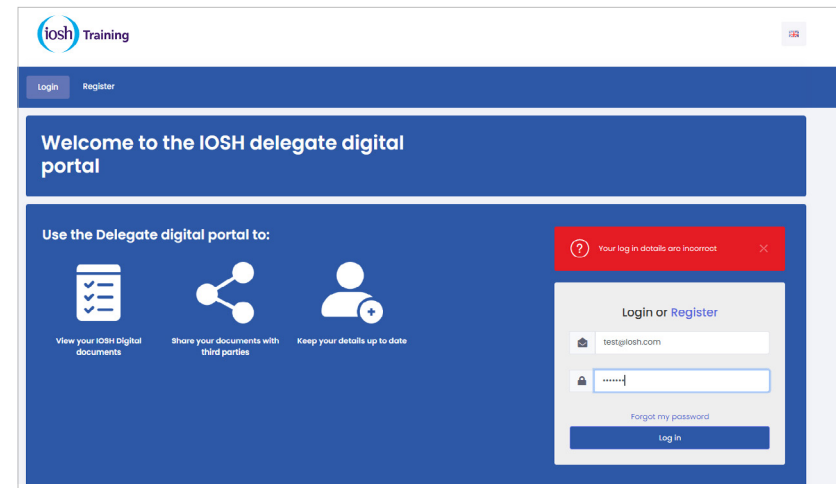


Incorrect log in

If you enter your login details incorrectly, you will see an error message come up on the screen. When this happens, re-type your details ensuring they are entered accurately.

If you enter your details incorrectly more than five times you will be temporarily locked out of your account.

You will be able to re-attempt log in after 60 minutes.



Forgotten password

Select the 'Forgot my password' link on the log in screen.

Enter your email address when prompted and select 'Reset password'.

The diagram illustrates the process of resetting a password. It starts with a 'Log in or Register' screen. This screen has two input fields: 'email address' (with an envelope icon) and 'password' (with a lock icon). Below these fields is a link that says 'Forgot my password' and a large blue button labeled 'Log in'. A teal arrow points from the 'Forgot my password' link to a 'Reset Password' screen. The 'Reset Password' screen has a single input field labeled 'Email address' and two buttons at the bottom: 'Return to Login' and 'Reset Password'.

If there is a user profile associated with the email address, an email will be sent with a password reset link.

If there is no profile associated with the email address, the following message will be displayed.

When the 'Reset password link could not be sent to the provided email address' message is displayed, attempt to log in again ensuring all details have been entered accurately. If the message continues to show, contact your training course provider for further support.

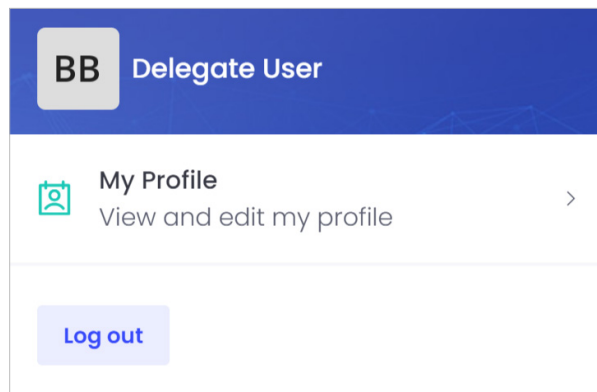
This screenshot shows the 'Reset Password' screen with an error message at the top. The error message is in a yellow box and reads: 'Reset password link could not be sent to provided email address'. Below the error message, the 'Reset Password' screen is visible. It has an input field labeled 'Email address' containing the text 'user.guide@iosh.com'. At the bottom, there are two buttons: 'Return to Login' and 'Reset Password'.

4 Manage 'My Profile'

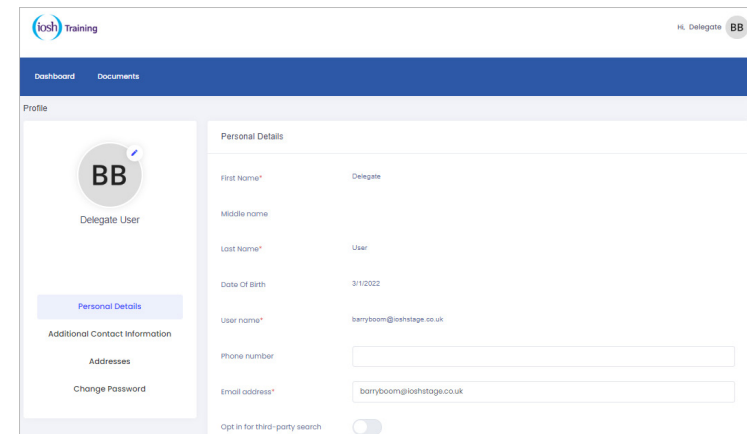
Select the grey circle in the top right corner to access the 'My Profile' menu.



Click 'My Profile' to make edits to your profile.

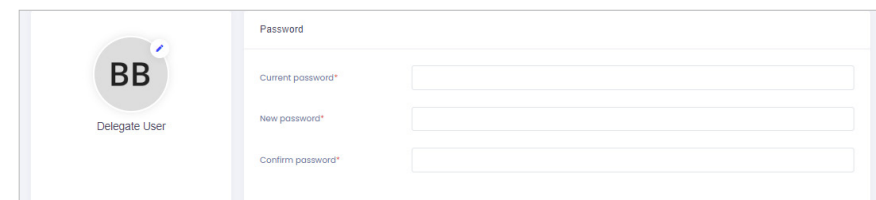


In your profile section, all mandatory fields will have already been populated. Any blank fields are optional. If you need to update personal details that you are unable to edit from your profile (eg your name or enrolment email address), please contact your training provider.



If you need to change your password, you can do that by clicking 'Change password' at the bottom of the left hand navigation menu.

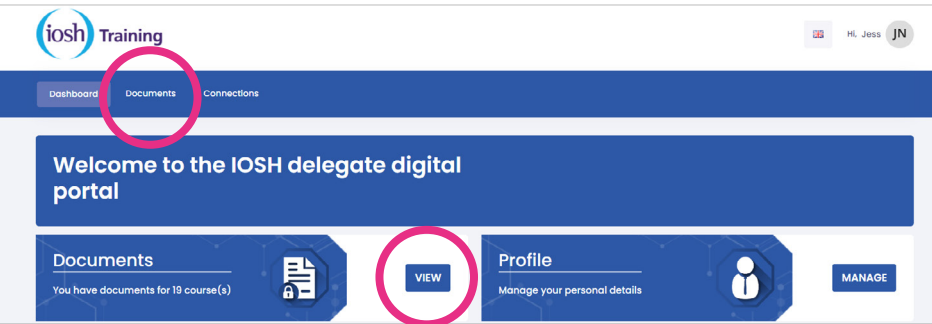
Enter your existing password in 'Current password', then repeat the new password in 'New password' and 'Confirm password'. Select 'Save'.



5 Access your digital workbooks

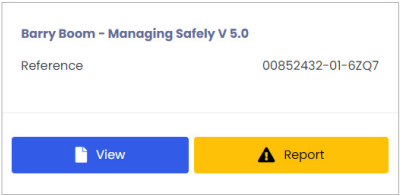
You'll receive an email to let you know when your digital workbook is available in the portal. You can use the link in the email to access your workbook.

Workbooks can also be accessed from the main dashboard by clicking 'View' next to the 'Documents' tile, or by selecting the 'Documents' link in the top navigation.



You will be able to view documents for all courses you are registered for from the 'Documents' page by clicking the 'View' button under each course title.

If you have any problems accessing, saving or printing a document, select 'Report' to request support.



Complete the form, detailing the problem you are experiencing and select 'Send' to submit the report. A member of the IOSH support team will be in touch with you as soon as possible.

Report Document Issue

Issue reason

Issue Description

The following details will also be included in the email

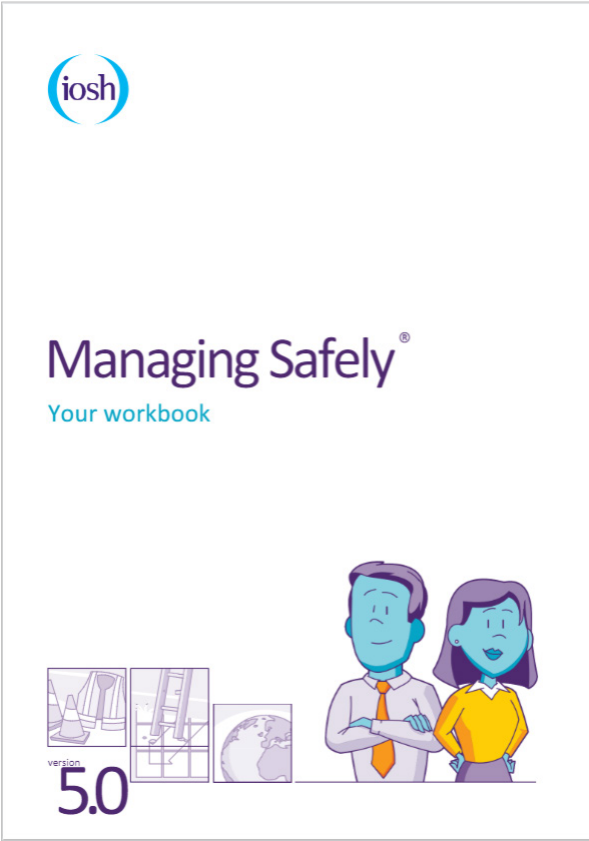
Reporter's Name:	Delegate User
Reporter's Email:	barryboom@ioshstage.co.uk
Student's Enrolment Number:	barryboom@ioshstage.co.uk
Qualification Title:	Barry Boom - Managing Safely V 5.0

Send

Selecting 'View' opens an interactive copy of the workbook in DocViewer which can be downloaded and printed if required.

Please note: it is only possible to download and print one copy of the workbook.

Workbooks must be downloaded in order to be editable and compatible with screenreaders.



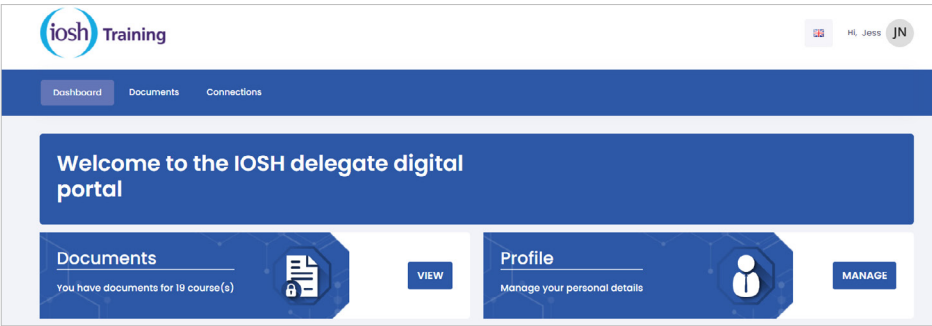
DocViewer provides the following options:

Icon	Description
	Use this drop down to view different documents available to you for the training course.
	This icon enables you to turn the navigation side panel on and off for a multi-page document, such as your course workbook.
	This icon enables you to view various page options: • Page transition You can choose whether each page of your workbook 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 your workbook.
	This icon displays different settings for your workbook. Available options include: - 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. Please note: you can only save your workbook once. - Print. Click this icon to activate the print screen. The print screen will open in your browser. Please note: you can only print one copy of your workbook.

6 Access your digital certificates

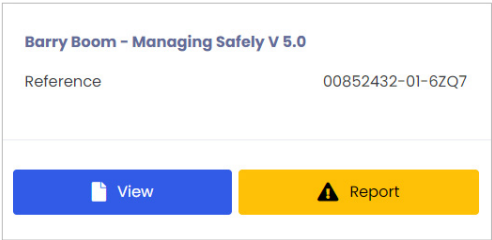
You'll receive an email to let you know when your digital certificate is available in the portal. You can use the link in the email to access your certificate.

Certificates can also be accessed from the main dashboard by clicking 'View' next to the 'Documents' tile, or by selecting the 'Documents' link in the top navigation.



You will be able to view documents for all courses you are registered for from the 'Documents' page by clicking the 'View' button under each course title.

If you have any problems accessing, saving or printing a document, select 'Report' to request support.



Complete the form, detailing the problem you are experiencing and select 'Send' to submit the report. A member of the IOSH support team will be in touch with you as soon as possible.

Report Document Issue

Issue reason

Issue Description

The following details will also be included in the email

Reporter's Name:	Delegate User
Reporter's Email:	barryboom@ioshstage.co.uk
Student's Enrolment Number:	barryboom@ioshstage.co.uk
Qualification Title:	Barry Boom - Managing Safely V 5.0

Send

Selecting 'View' opens a copy of the certificate in DocViewer, which can be downloaded and printed if required.

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



DocViewer provides the following options:

Icon	Description
	Use this drop down to view different documents available to you for the training course.
	This icon enables you to view various page options: Page orientation Rotates the page clockwise or anti-clockwise by 90 degrees.
	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 your certificate.
	This icon displays different settings for your certificate. Available options include: - 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.

7 How to verify a digital certificate

Your digital certificate can be easily verified by scanning the QR code with a smart phone camera. A window will open to confirm your name, validity of the document and date of issue.



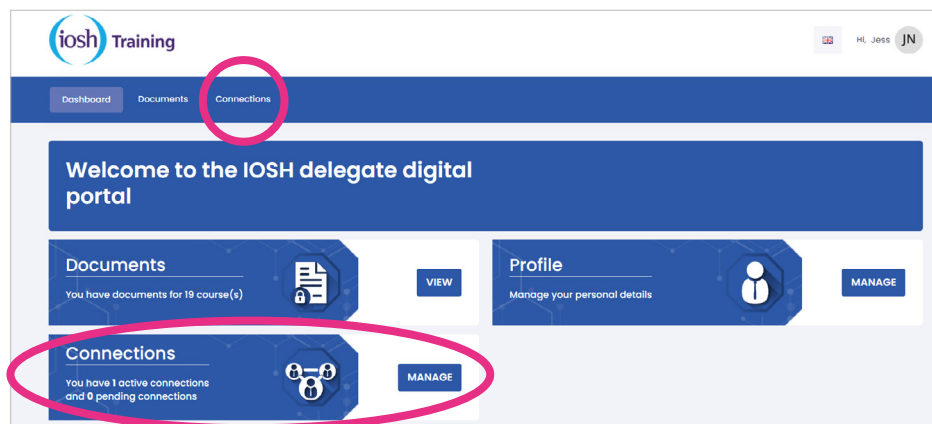
8 How to share your digital documents

The 'Connections' feature enables delegates to share digital documents with third parties.

Sending a connection request and sharing digital documents

As a delegate you can proactively share your digital certificate with a third party of your choosing.

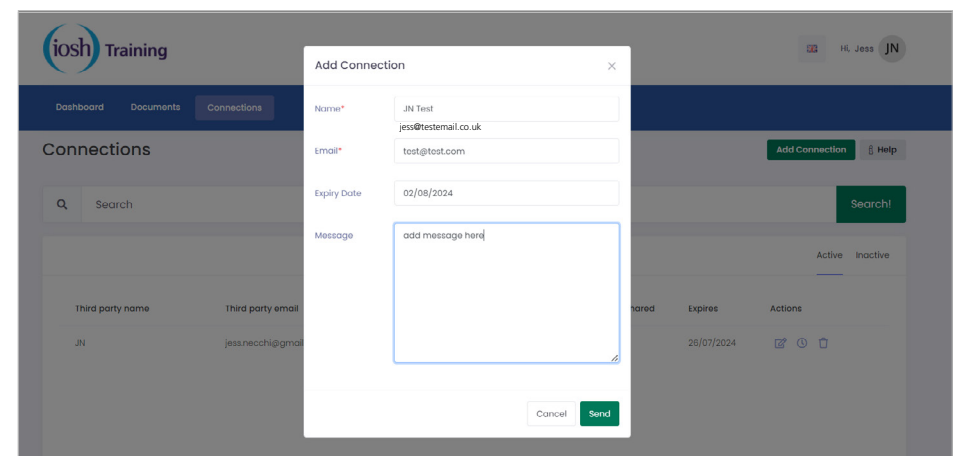
In order to share a digital document, navigate to the 'Connections' tile and click 'Manage', or select the 'Connections' tab on your dashboard.



Once you reach the connections screen, navigate to 'Add Connection'.

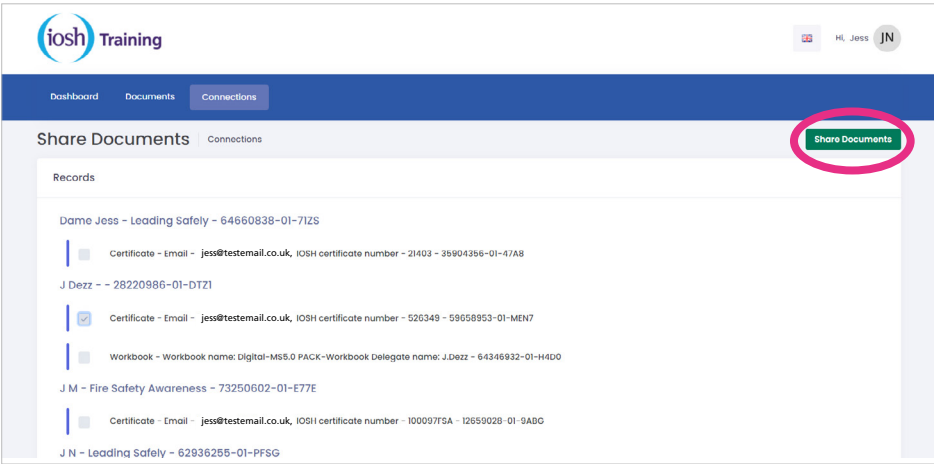


A dialog box will open where you can type the name and email address of your connection and set an optional expiry date for your document share. If you don't set an expiry, the default is 24 hours. You can also add an email message.



You will then be taken to a document list, where you can select which digital document(s) you'd like to share with your new connection.

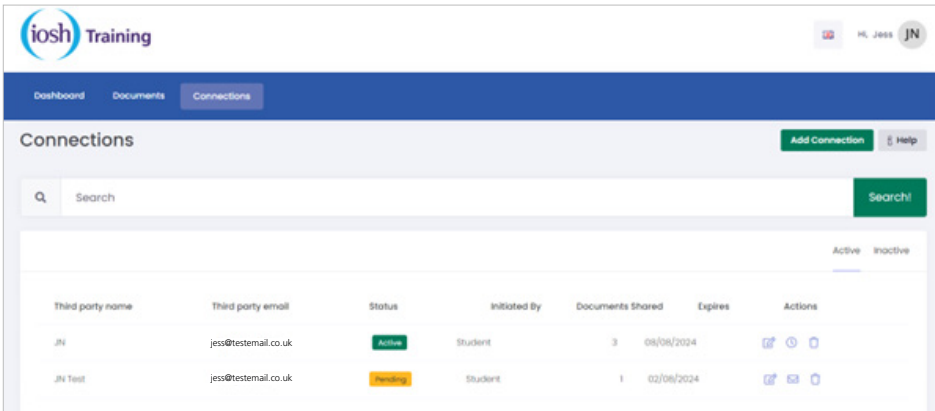
Once selected, click 'Share Documents'.



The request with a link to the IOSH connections portal will be sent to the email address you enter for the recipient.

The recipient will need to click the link and register for the IOSH connections portal in order to view the digital documents you share with them, and to show as 'Active' in your connections list.

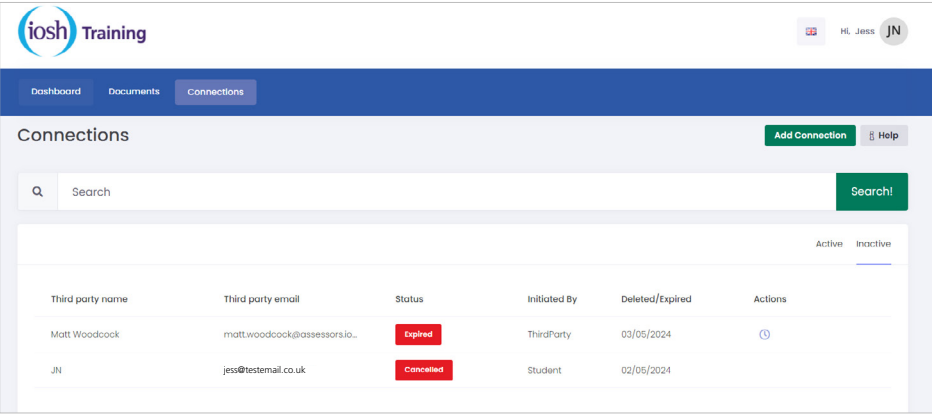
Until then, the recipient will show as 'Pending' in your connections list. Below is an example of a pending and active connection.



Your connections list shows useful details including your connection's name, email address, number of documents shared, and the expiry date you've set for your document share. You can also perform several actions against each connection:

	Edit the documents they can access
	Extend or reduce the expiry date
	Re-send the connection request email (pending connections only)
	Cancel the connection

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

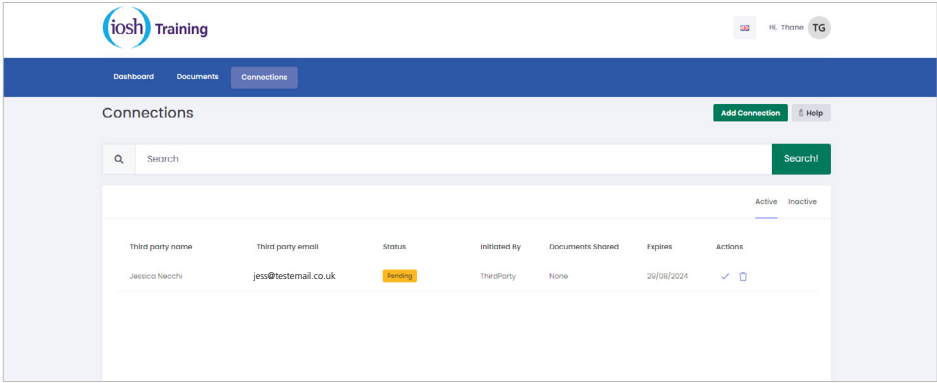


For expired connections, click the clock icon under ‘Actions’ to extend the connection. Cancelled connections need to be re-invited from scratch.

Receiving a connection request and sharing digital documents

Third parties can also request to connect with delegates and ask to view digital documents. When you get a connection request as a delegate, you’ll receive an email notifying you that a third party wants to connect.

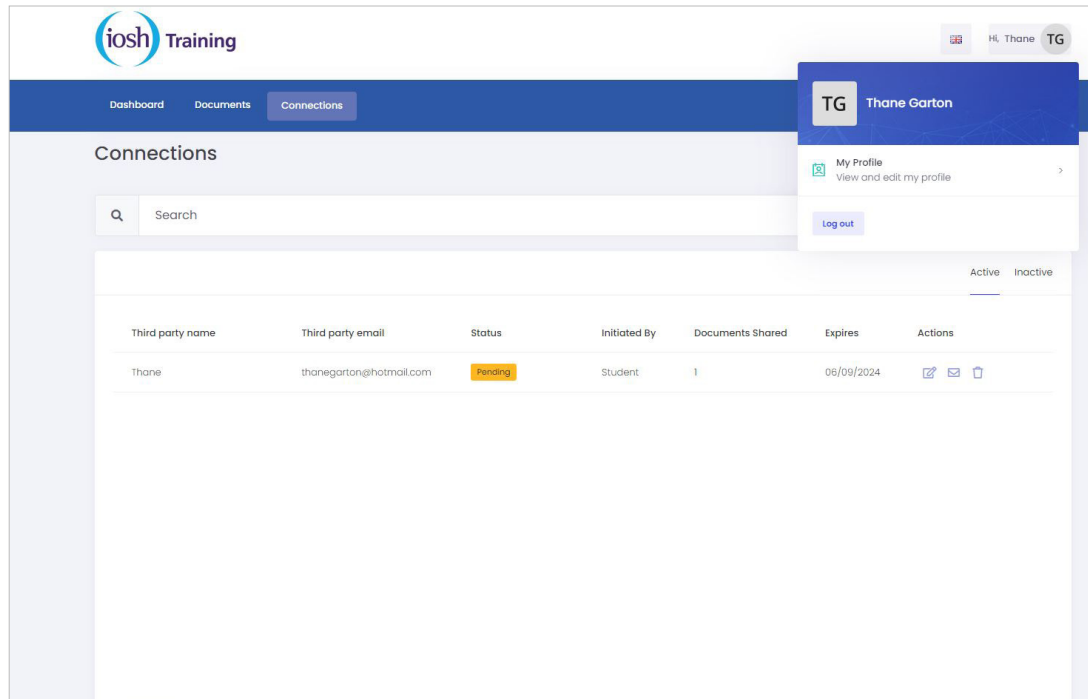
Click the link in the email to log in to your portal. Navigate to the ‘Connections’ tab and accept the request by clicking the tick icon next to the connection record.



You will then be asked which documents you’d like to share with the third party. The sharing process works the same as described in previously in this section.

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'.



The screenshot displays the iosh Training portal interface. At the top, the iosh Training logo is on the left, and the user's name 'Hi, Thane TG' is on the right. Below the logo, there are navigation tabs: 'Dashboard', 'Documents', and 'Connections'. The 'Connections' tab is currently selected. The main content area shows a search bar with the text 'Search' and a table of connections. The table has columns for 'Third party name', 'Third party email', 'Status', 'Initiated By', 'Documents Shared', 'Expires', and 'Actions'. There is one entry in the table with the name 'Thane', email 'thane.garton@hotmail.com', and status 'pending'. To the right of the main content area, a user profile dropdown menu is open, showing the user's name 'Thane Garton' and a 'Log out' button.

Third party name	Third party email	Status	Initiated By	Documents Shared	Expires	Actions
Thane	thane.garton@hotmail.com	pending	Student	1	06/09/2024	Edit Email Delete

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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 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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