

Manage delegates for training providers

1 Navigate to Courses.

ing listing - 111

hip.net/dashboard/course-booking-listing/

Dashboard **Courses** Buy stock My files Contact us Digital portal

Book and manage training courses

Search and manage your existing course bookings and create new course bookings. Once a new course booking is added.

i Remember to create your course booking at least 24 hours before the start date of your course, so that you have time to assign documents before your course starts.

Start typing... **i**

Filter:

From To

2

Search for the course using the filters at the top of the page or from the course list.

Trainer gavin embley
Delivery method Virtual
Location Bengaluru
Start date 01 January 2026

6. CB-001549 | Managing Safely V 5.0

Confirmed



Trainer gavin embley
Delivery method Virtual
Location Bengaluru
Start date 01 January 2026

7. CB-001572 | Managing Safely for Construction

Confirmed



Trainer Thomas Millsopp
Delivery method Classroom
Location London
Start date 31 December 2025

3

Select Manage delegates.

Trainer
gavin embley
Delivery method
Virtual
Location
Bengaluru
Start date
01 January 2026
End date
31 January 2026
Delegate capacity
20
Delegate total
1

View, edit, confirm or cancel registered delegates.

Manage delegates

Add delegate

Bulk upload delegates

4 There will be a pop-up with Apty guidance, sharing tips to help.

The screenshot shows a web application interface with a pop-up window. The background is a dark grey panel with the title "Managing Safely V 5.0 - CB-001549". Below the title, there are several sections: "3. Add delegate results", "ping...", "yz abc", and "EL-00002740". There are buttons for "Edit delegate" and "delegate". On the right side, there is a "Confirmed" status. The pop-up window is white with a title "Tips to help you manage your delegates" and contains a list of tips. At the bottom of the pop-up, there are two buttons: "Don't show again" and "Close".

Tips to help you manage your delegates

- Always assign documents (workbooks/certificates) before confirming your delegates.
- We recommend checking and replenishing your stock before assigning workbooks/certificates to delegates.
- If you assign documents but you have no stock, an invoice will be generated.
- Invoices will be emailed to your main administrator. They will also appear in 'Credit and invoices.'
- Orders will not be fulfilled until the invoice is paid, unless you have a credit account with available credit.
- Digital workbooks cannot be returned to stock once they have been assigned to a delegate, even if the delegate is cancelled.
- Hardcopy workbooks and all certificates can be returned to stock once they've been assigned if the delegate is cancelled, provided results haven't been entered.
- Remember to confirm delegate attendance before or when your training course starts.
- Once delegates are confirmed and the course start date has passed, results can be entered.

5 Training providers can assign documents to delegates through this page.

The screenshot shows the "View and manage delegates" page. At the top, there is a navigation menu with links: "Dashboard", "Courses", "Buy stock", "My files", "Contact us", and "Digital portal". Below the navigation menu, the page title is "View and manage delegates". Underneath the title, there is a paragraph of text: "Manage your delegates, assign documents and confirm their attendance on your training course here. Once de able to enter their results at the end of the course. Follow these steps: 1. Assign documents; 2. Confirm delegat". Below the paragraph, there is a section titled "Managing Safely V 5.0 - CB-001549". Underneath this section, there are three buttons: "Step 3. Add delegate results", "Step 1. Assign documents", and "Step 2. Confirm delegate attendanc". The "Step 1. Assign documents" button is highlighted with an orange circle. Below the buttons, there is a search bar with the placeholder text "Start typing..." and a magnifying glass icon.



If a training provider does not have enough stock to complete their document orders for their course, an invoice will be created and sent to the administrator. Training providers can navigate to the Credit and invoices from the Dashboard to view and pay for invoices.

6

Once the course has started, training providers can confirm their delegate's attendance. They can still edit delegate details at this point as long as it is before the start date.

Dashboard Courses Buy stock My files Contact us Digital portal [Change](#)

View and manage delegates

Manage your delegates, assign documents and confirm their attendance on your training course here. Once delegates are con able to enter their results at the end of the course. Follow these steps: 1. Assign documents; 2. Confirm delegates; 3. Submit re

Managing Safely V 5.0 - CB-001549

Step 3. Add delegate results Step 1. Assign documents Step 2. Confirm delegate attendance

Start typing...



Training providers must confirm attendance on the day before the course starts to allow delegates to receive workbooks on their delegate portal.

7

Training providers can add their delegates results on this page.

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View and manage delegates

Manage your delegates, assign documents and confirm their attendance on your training course here. Once delegates are con able to enter their results at the end of the course. Follow these steps: 1. Assign documents; 2. Confirm delegates; 3. Submit re

Managing Safely V 5.0 - CB-001549

Step 3. Add delegate results Step 1. Assign documents Step 2. Confirm delegate attendance

Start typing...

Editing delegate information

8 To amend delegates first and last names, select Edit delegate.

The screenshot shows a user interface for managing delegates. At the top, there are two tabs: "Step 1. Assign documents" and "Step 2. Confirm delegate attendance". Below the tabs is a search bar with the placeholder text "Start typing..." and a magnifying glass icon. The main content area displays a list of delegates. The first delegate is "1. John Doe" with the ID "DEL-00002746" and a status of "Provisional". Below the delegate name, there is a hyphen "-" and two buttons: "Edit delegate" (highlighted with an orange circle) and "Cancel". At the bottom of the interface, there are two buttons: "Add delegate" and "Back".

 At the moment, training providers can only edit the first and last name of their delegates. It is in the works that we will extend the editing permission to all fields including DOB and email.

9 Amend the first and last name of the delegate.

Add delegate

Delegate registration form

Selected course booking

Working Safely v 5.0 - CB-001581

First name*

John

Last name*

Doe

National ID

Email

iohndoe@iosh.com

10 Select Save and continue.

Job Title

Please select

Workbook

- Digital
 Hardcopy

Certificate

- Digital
 Hardcopy