Digital Certificates Web - Employer/Third Party Portal

Contents

1. Introduction

This guide describes user functions for the Verification Portal of the Digital Certificates Web software application supplied by Advanced Secure Technologies (AST).
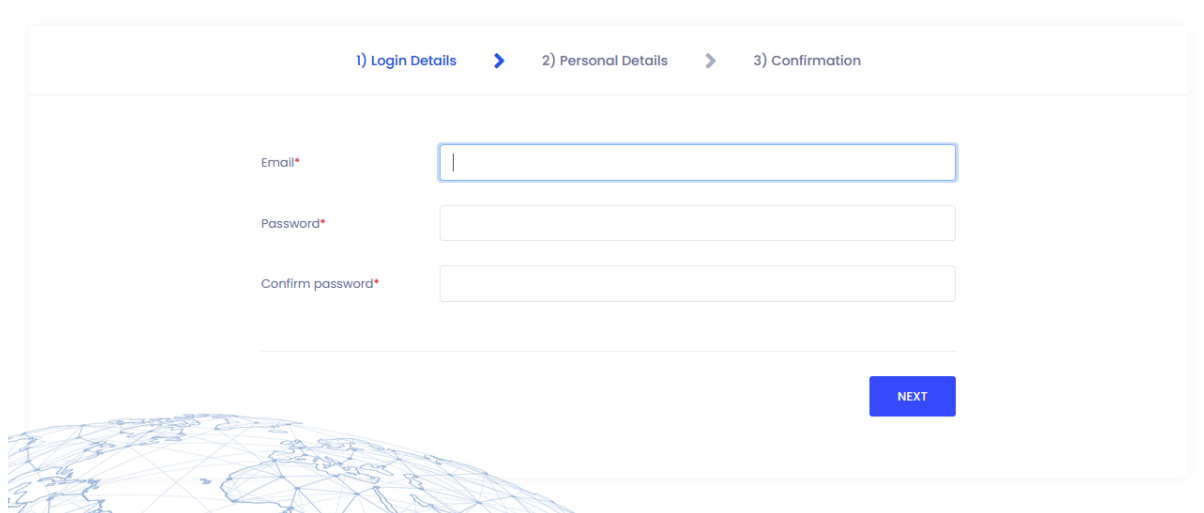

2. Functionality of the Verification portal

- Learners registered on the Portal can send connection requests via email to allow Third Parties to view electronic versions of their qualification and status documents.
- On receipt of such a request, the Third party needs to carry out a registration process on the verification portal which will then provide them with secure access to the documents in question.
- The connection can be cancelled by either party at any time.
- The connection has an expiry time but can be extended by the learner.
- The Third party may also request an extension to the expiry date if required.
- The Third party can request reactivation of an expired or cancelled connection.
- Once registered, a Third party can then send connection requests to other learner email addresses.

3. Registration

This is a very quick and simple registration process requiring only your email address, password setup and name.

Step 1) Login Details
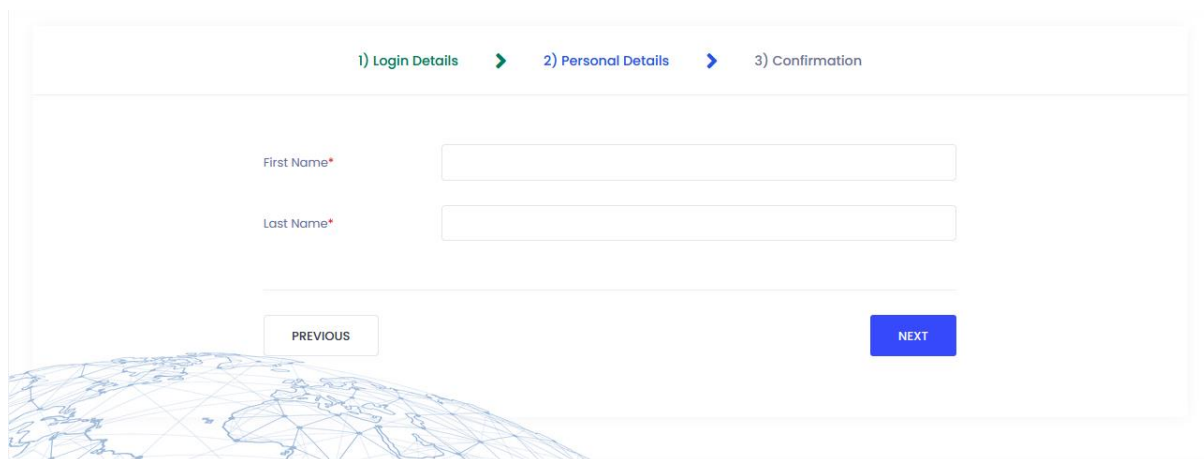
Step 2) Personal Details

Step 3) Confirmation

After successful completion of the registration process, the email verification email is sent to the email used upon registration.

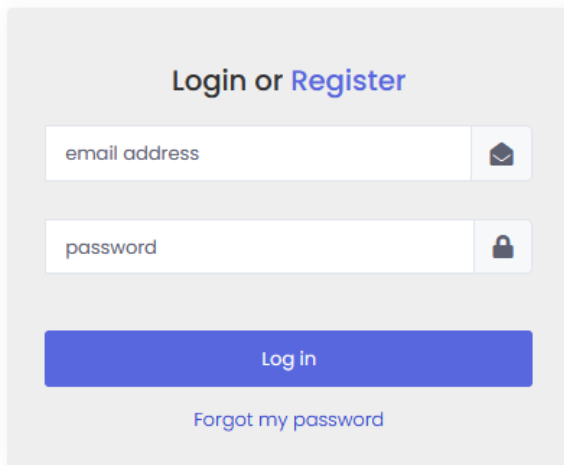Once received click on the link in the email to successfully verify the email used for registration.
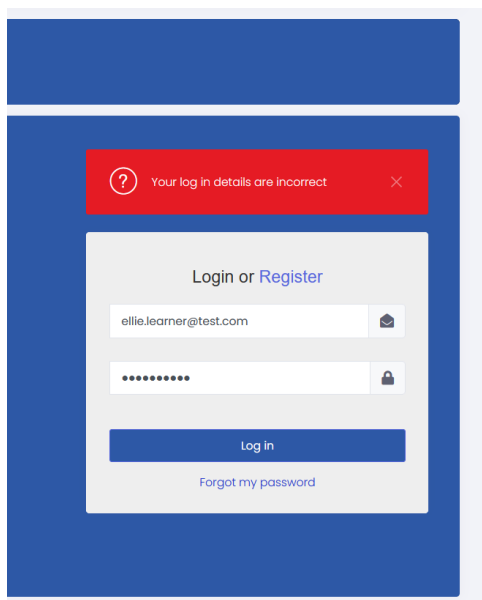
Once verified you will be able to log into the application.

5.   Login
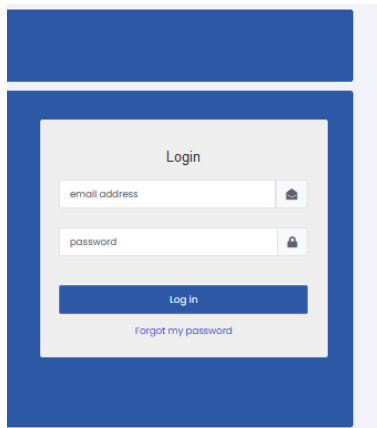
- •   Username – this is the email address used for registration.

- •   Email address – This can be changed from within your profile.

- •   Password – This can be changed from within your profile.

- •   Locked out – If you enter your password incorrectly 5 times or an admin user locks your account then the following message will be displayed 'Your log in details are incorrect'. Alternatively you can wait a period of time (usually an hour) before becoming unlocked.
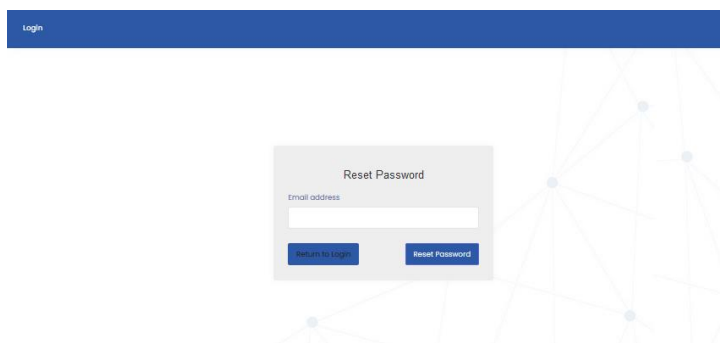
4. Forgotten Password/Reset Password

Please follow the 'Forgot my password' link on the log in page.
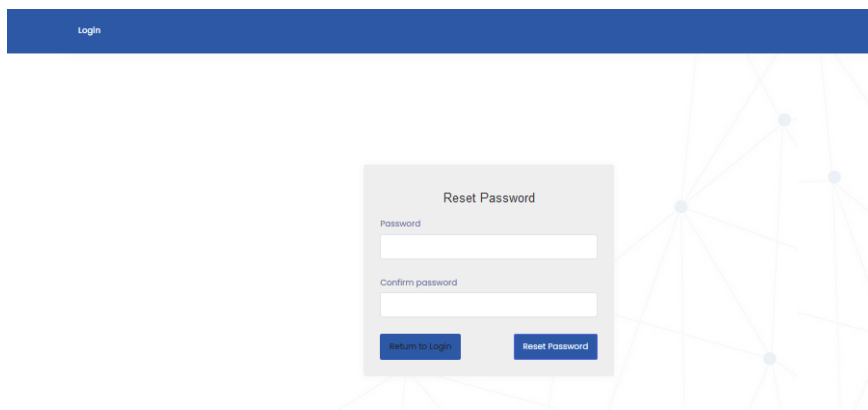
You'll be taken to a Reset Password Page

You must enter their email address in the text field and then click on the reset password link.

An email is then sent if there is a valid user profile associated with the email used here.

You should then receive an email with a link to reset your password.

You need to enter a new password twice to successfully reset your password in order to login to the portal.

5. Dashboard

1. Connect (Create)

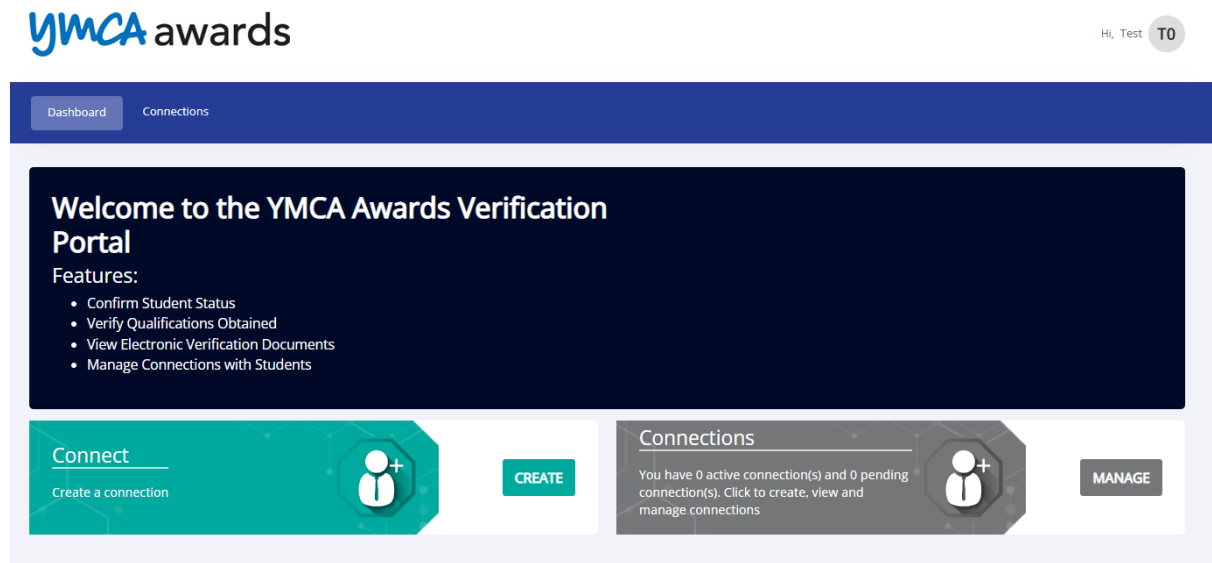Once registered, you can request access to a learner's qualifications. By entering the learner's name and email address. If the learner in question is already registered on the portal and accepts the connection then you'll be able to immediately view their documents. If the learner has not yet registered on the portal, then the student will have to carry out their own registration process before the connection can be achieved.

Adding a connection can be done by clicking on 'Add a connection'

Then an Add connection screen will display where a user can add a learner's name and also their email address.

You'll then get a confirmation that the request has been created, the email to the learner is then sent at this point notifying that a request has been made.
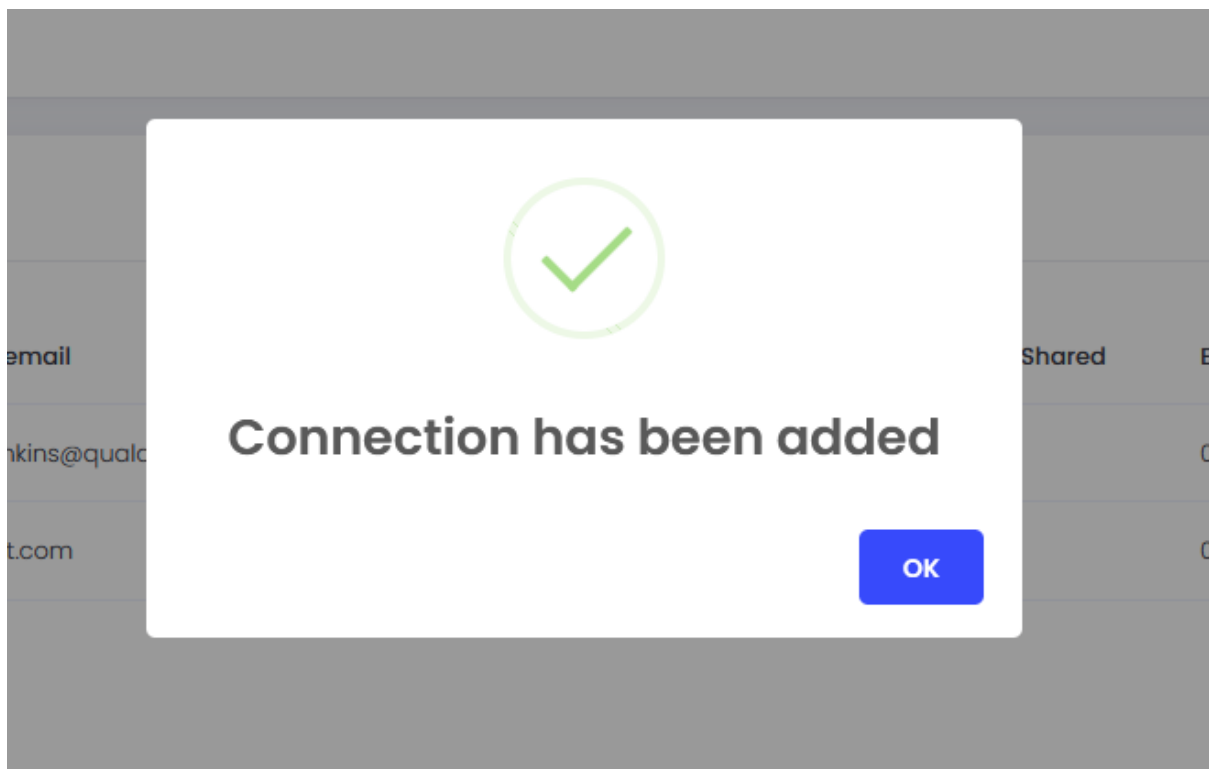
This request will then have a status of 'Pending' until the learner accepts the connection request.

Test Delegate	test@test.com	Pending	ThirdParty	None	07/04/2022	

2. Connections (Manage)

From this screen The Third party has the function to manage connections to learners as well as create connections

Active tab

Allows you to manage your existing connections with learners.

To view active connection requests from students, select 'Manage' on the homepage in the 'connections area'.

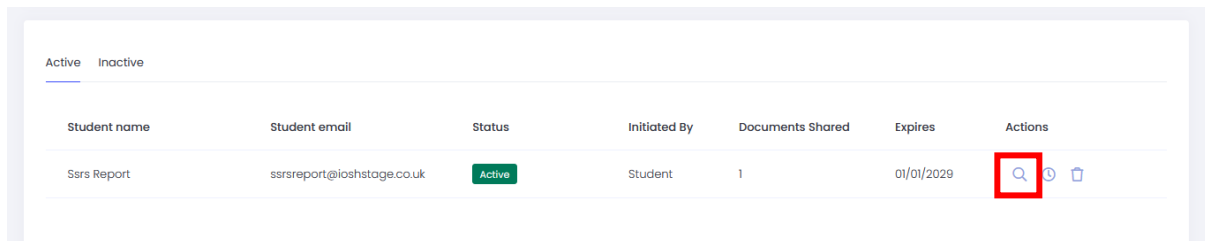The page will automatically load all 'Active' connections.

To view the connection, select the magnifying glass icon.

This then shows the course/qualification(s) that the learner has shared with you.

A documents page is displayed with two further options 'View' and 'Report'

In order to actually view the document shared click on the view button in the screenshot below

The Report button on the documents page opens a form in which the third party can raise any issues that they may have with the document itself. This email is then sent to a central mail box for the issue raised to be investigated.
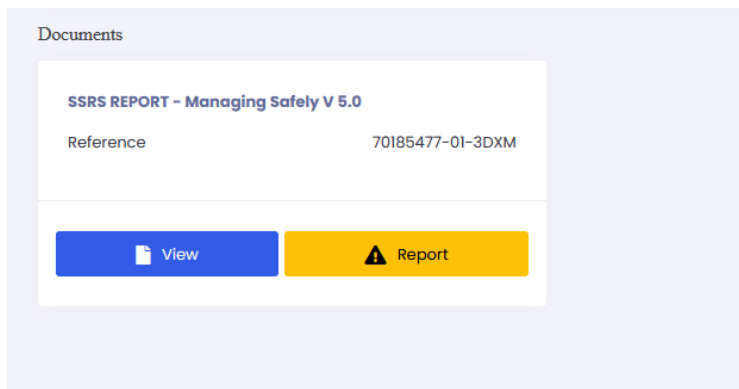
This then opens up a viewer and after a short time the student's available document for that course is then viewable.
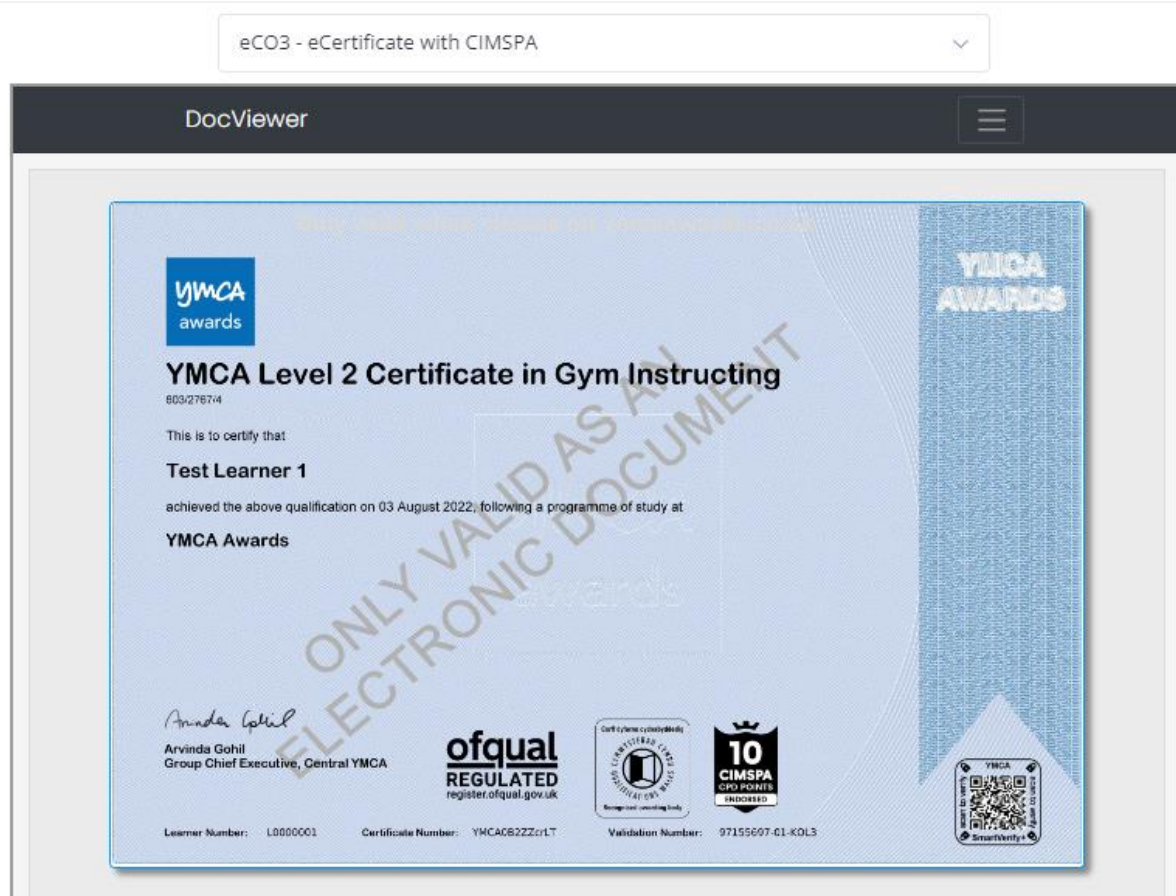
There are additional menu options available to you on the document viewer screen by clicking on the menu button on the red box indicated in the screenshot below.
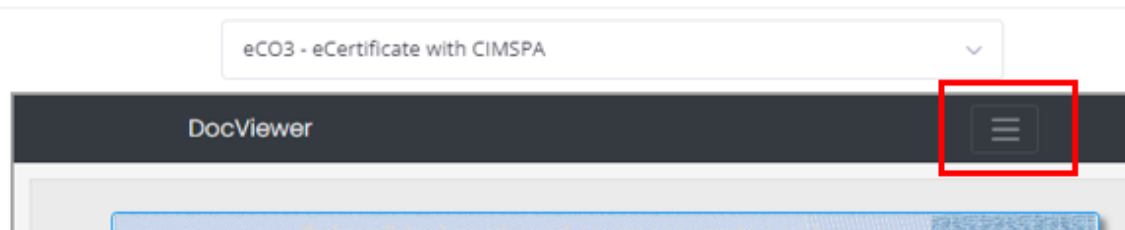
This then expands to reveal the following menu options
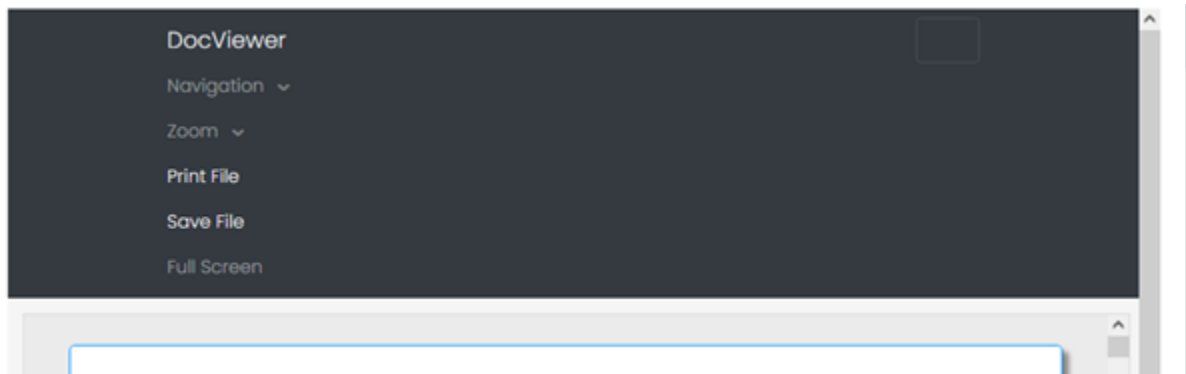
- Navigation – Allows you to look at the first, last, previous or next pages of the document on screen (if there is more than one record)
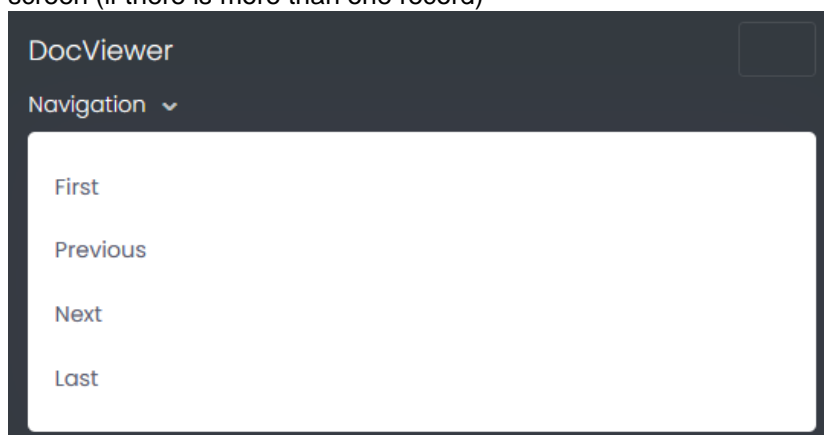
- Zoom – Allows for magnification of the document in the viewer, this can be zooming in and out in increments. Or viewing the document at fixed 25% or 100% respectively. There is also the option to tailor the zoom to the constraints of the document such as zoom to the documents width and the documents height.
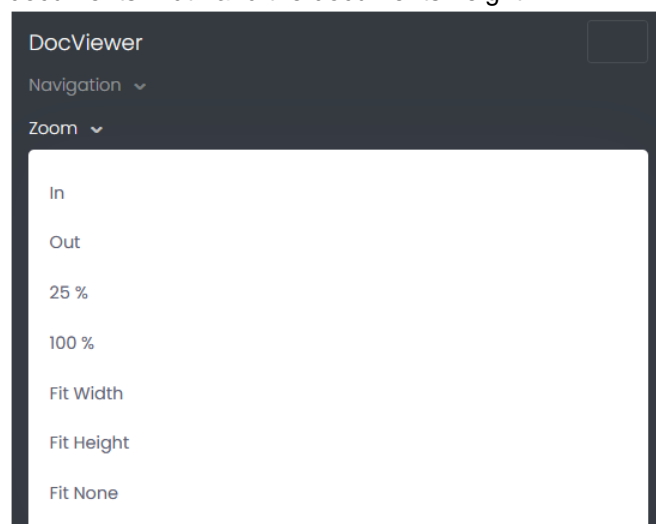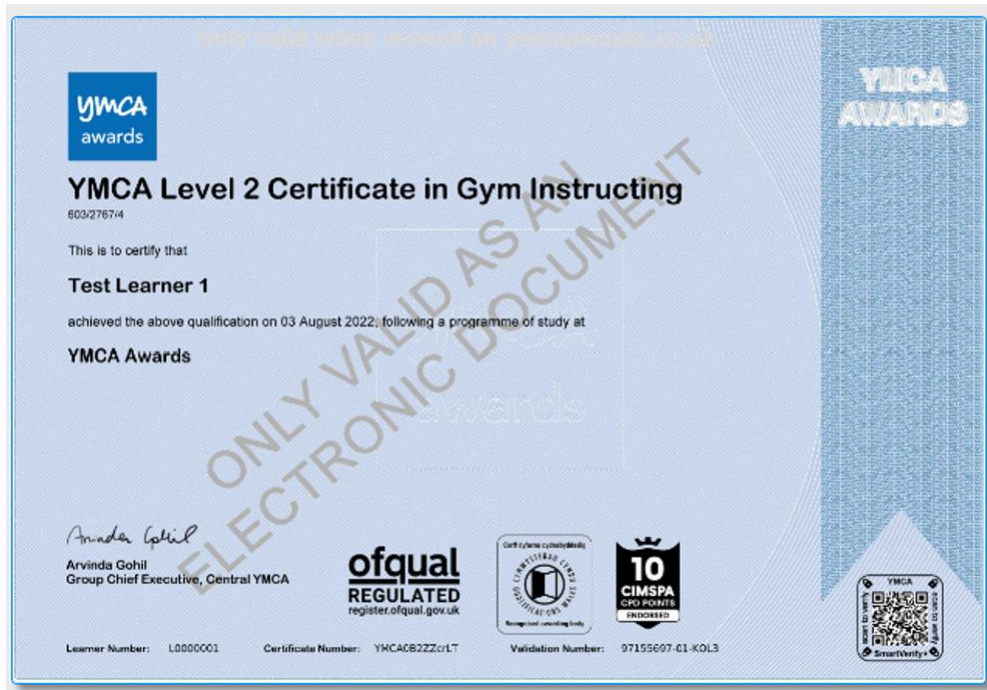
-
- Full Screen shows the document in full screen mode (pressing the escape (esc) key will exit full screen mode).

Extend – An extension of the expiry date for the connection can be requested here, the learner will have to first approve the request.

You then select the date in which you would like the extension to last up until.

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ECHNOLOGIES

Request Connection Extension   ✕

Expiry Date   30/03/2022

Extend Date*   [   ]

                              Cancel   Save

Request Connection Extension   ✕

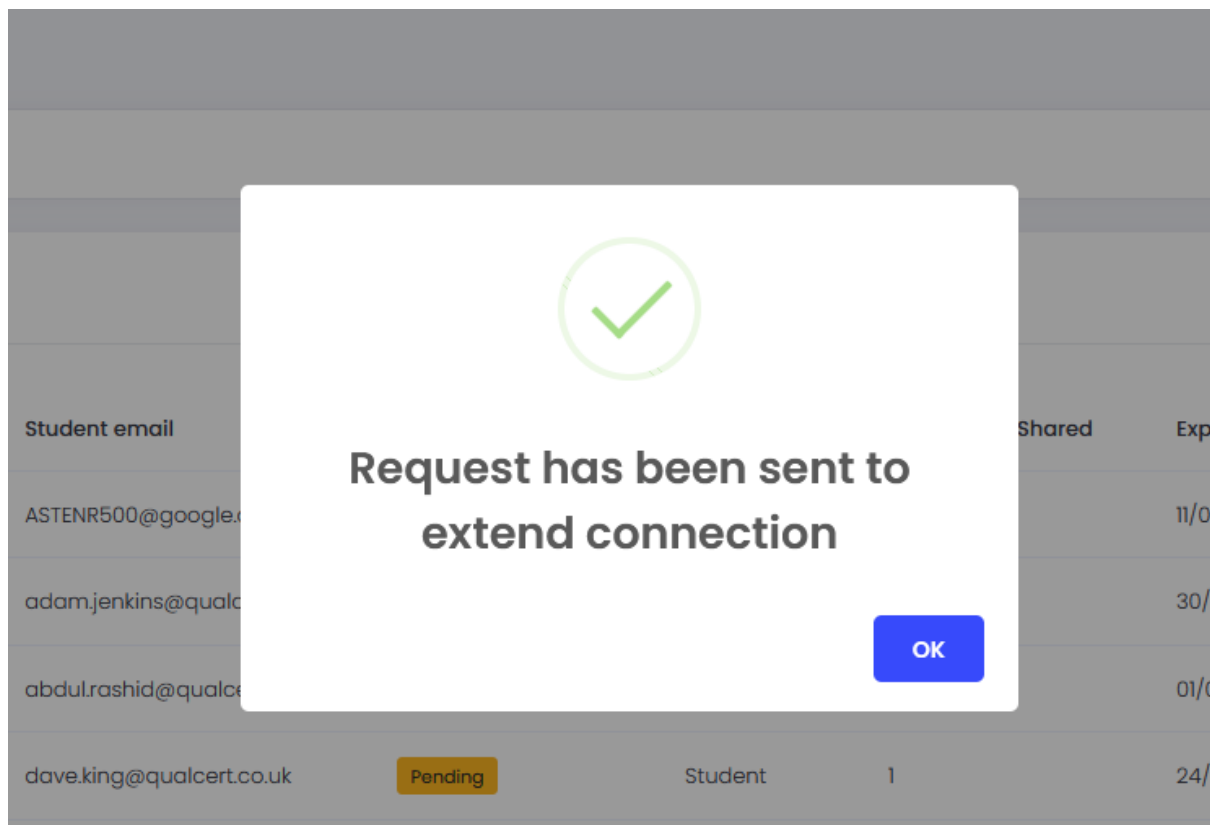Expiry Date   30/03/2022

Extend Date*   [   ]

<		April 2022				>
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Clear

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ᴇ ᴄ ʜ ɴ ᴏ ʟ ᴏ ɢ ɪ ᴇ s
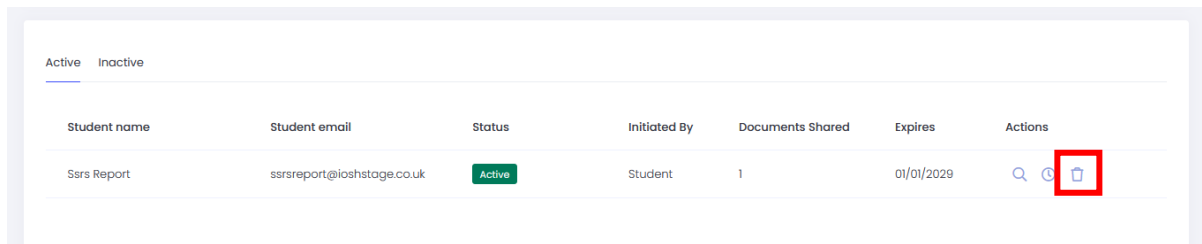
At this stage an email is sent to the learner requesting an extension. Once the learner approves then the new requested date will then become the new extension date going forward.
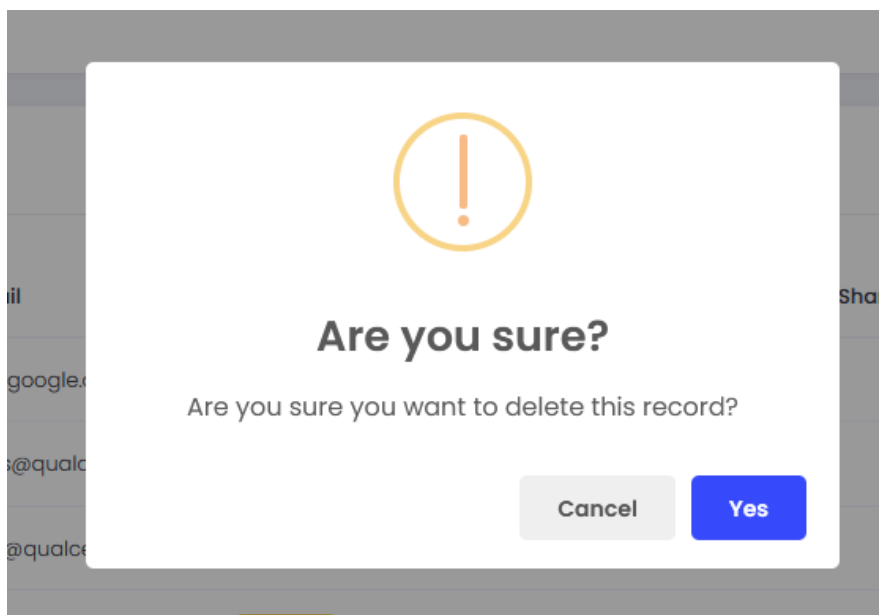
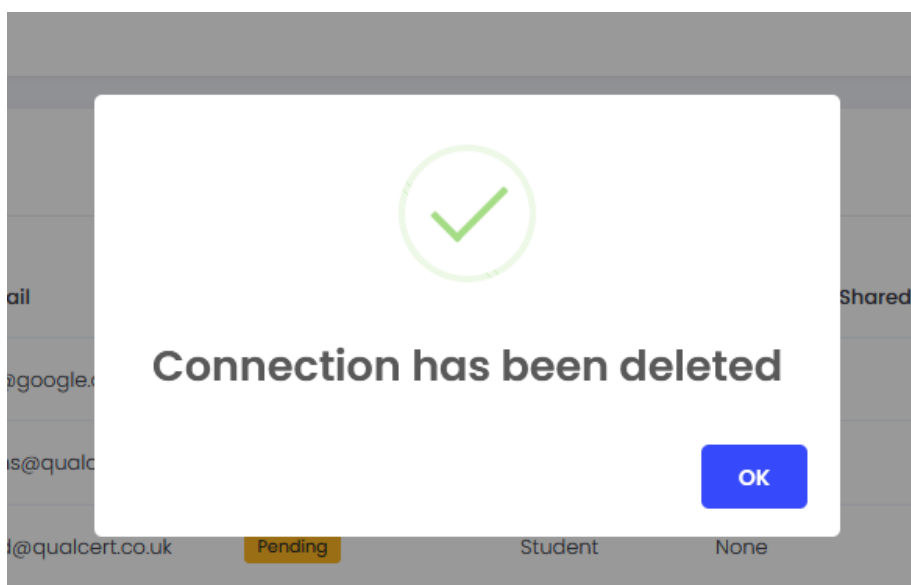Cancel – The connection can be cancelled by you at any time.

By clicking cancel the user is presented with an 'Are you sure?' message which the user can either 'Cancel' or click 'yes' on.
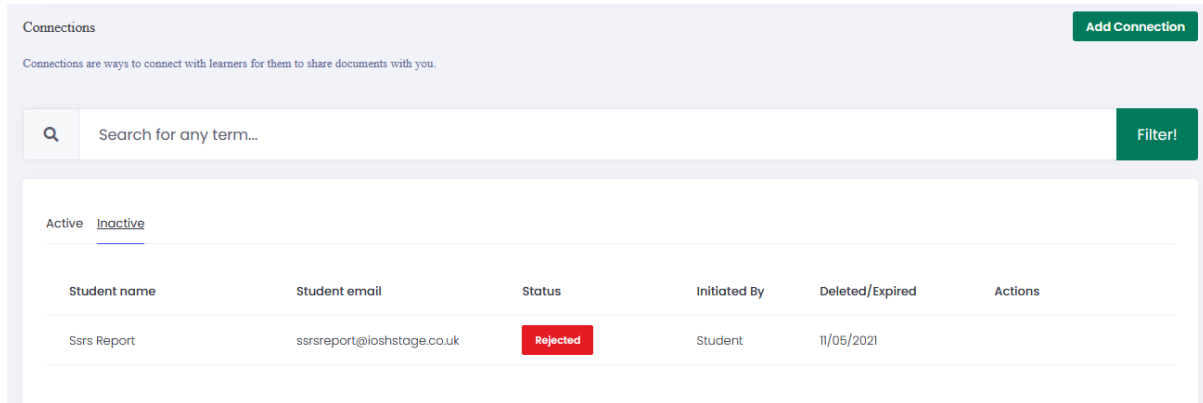

Once the 'Yes' option is selected than a confirmation message is displayed.

Inactive tab

Displays any connections which have expired, been rejected or been cancelled.

Reactivate – Once a connection has been rejected, expired or cancelled. The new connection process will need to be started in order for the user to view the learner's documents again.
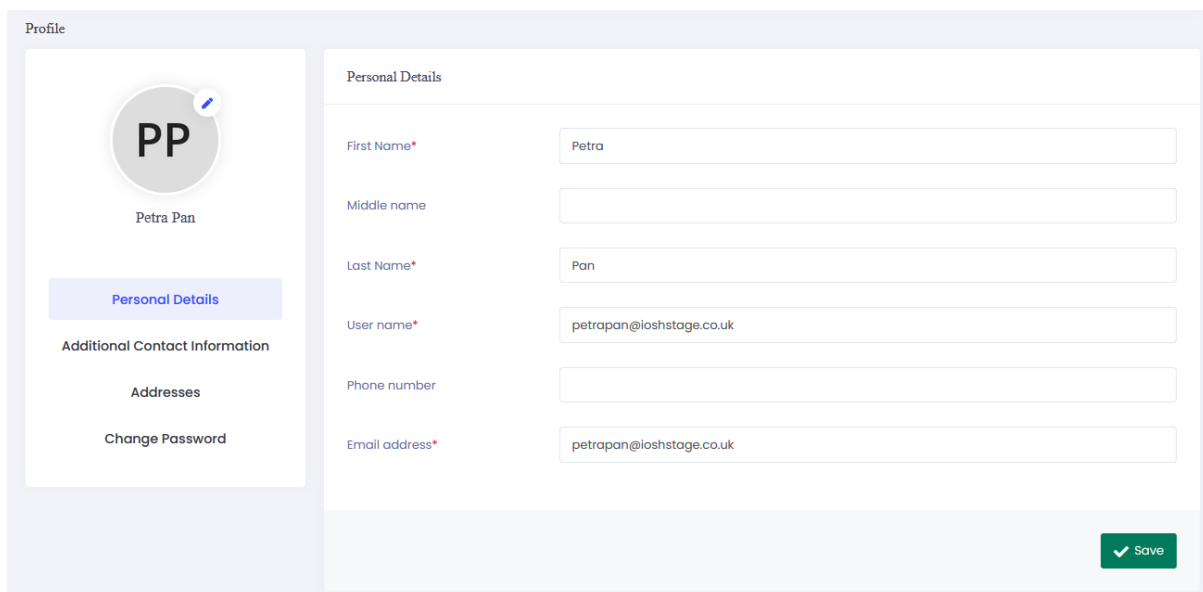
6. Profiles

Each user has a personal profile which can detail the following items of information which will be visible to any learner which a connection has been established.

Photo

Personal details

Additional Contact information

- Phone numbers
- Email addresses
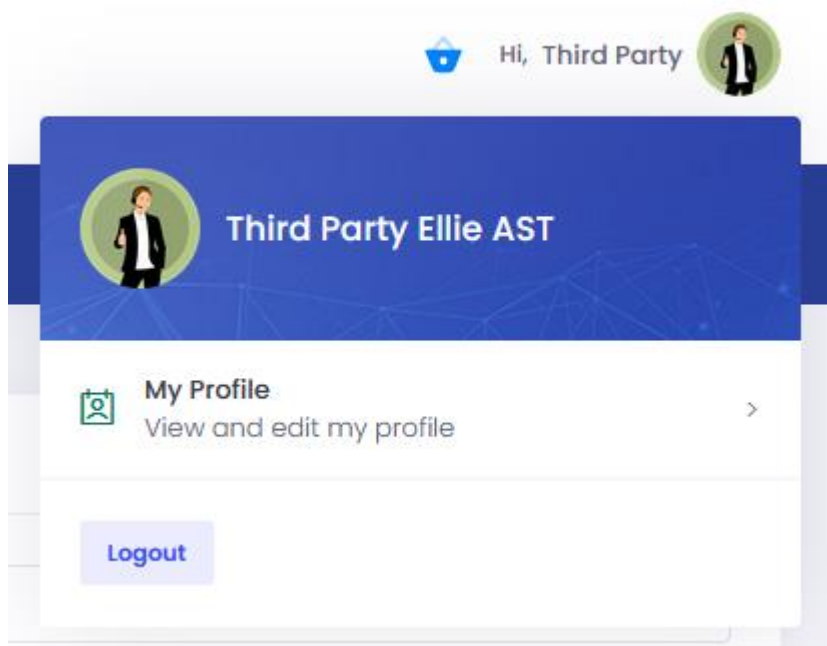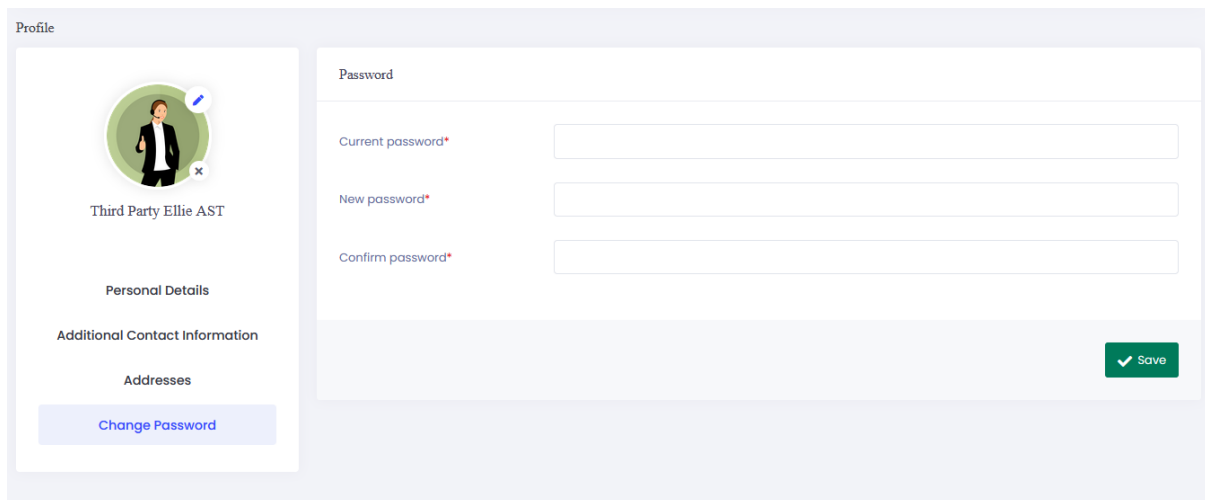- Social media

Addresses

Change password

The system will not initiate automatic password changes. This can be carried out by the user here.

Click on the username on the top right (should have an avatar image or alternatively initials (First and surnames in capitals)

Once on the profile screen click on change password

Note: In order to change change the password the user must know what their current password.

Once the password has been entered into the text box the user must click on save in order for the new password to be applied.

7. Useful links

On the home page, there are several useful links including Privacy, FAQ, Cookies, Terms and Support on the bottom right of the page.

8. Logout

Logout by using the logout button which is found by clicking on the name or profile photo (Initials are displayed if no photo is uploaded) at the top right of the web page.