

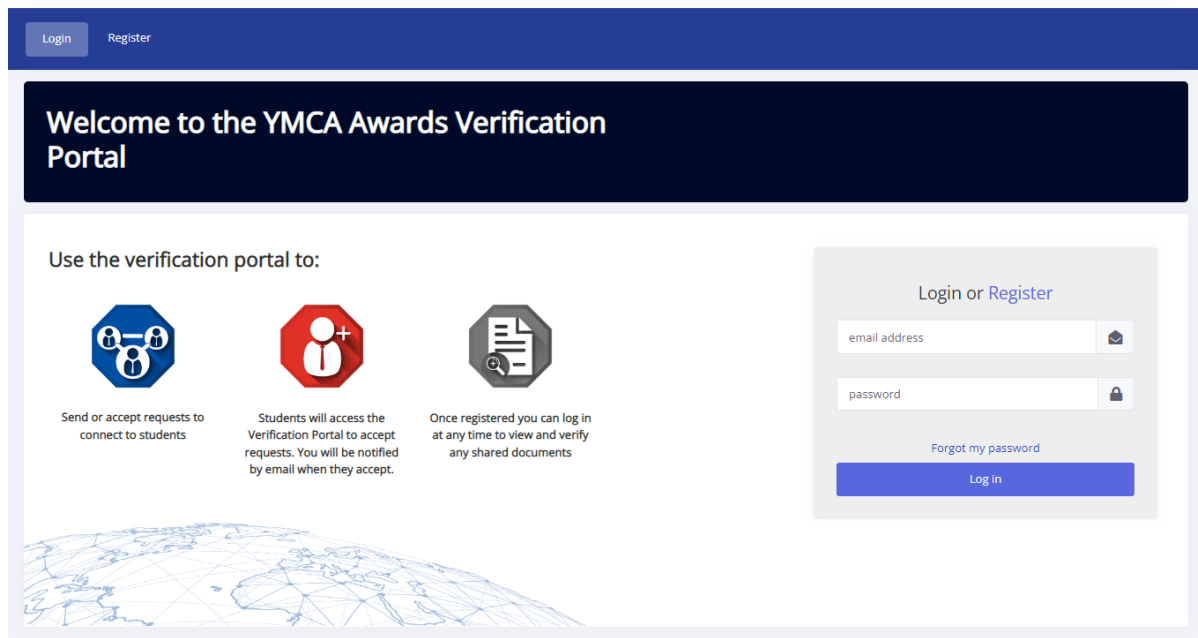
Digital Certificates Web - Employer/Third Party Portal

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1. Introduction

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



The screenshot shows the 'Welcome to the YMCA Awards Verification Portal' page. At the top, there are 'Login' and 'Register' buttons. Below the header, a dark blue banner contains the text 'Welcome to the YMCA Awards Verification Portal'. The main content area is titled 'Use the verification portal to:' and features three icons with descriptions: 1. A blue icon with two people and a plus sign, labeled 'Send or accept requests to connect to students'. 2. A red icon with a person and a plus sign, labeled 'Students will access the Verification Portal to accept requests. You will be notified by email when they accept.' 3. A grey icon with a document and a magnifying glass, labeled 'Once registered you can log in at any time to view and verify any shared documents'. To the right of these icons is a login/register form with fields for 'email address' and 'password', a 'Forgot my password' link, and a 'Log in' button. The background of the page features a stylized world map.

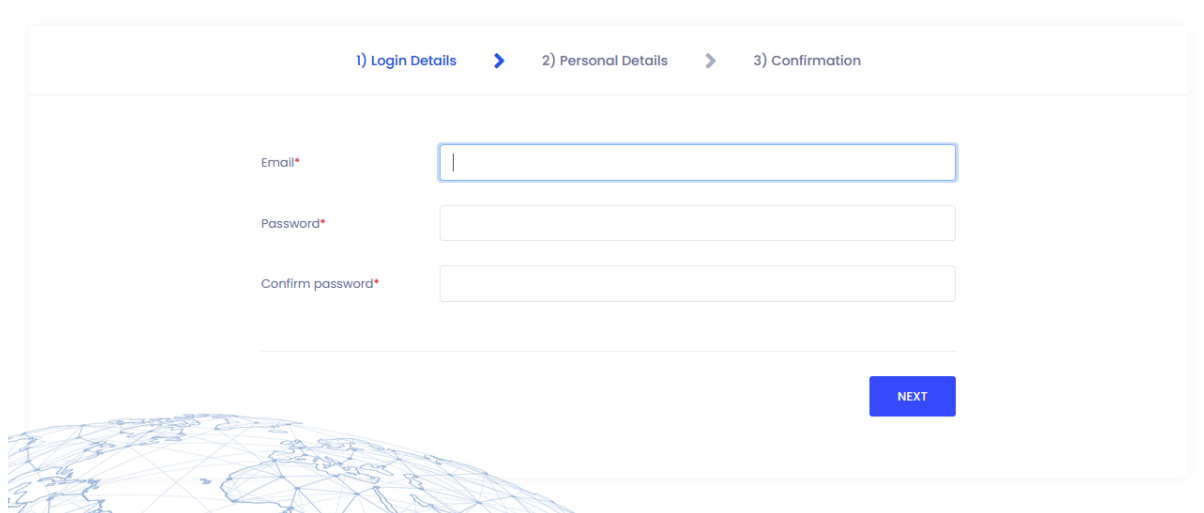
2. Functionality of the Verification portal

- 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

The screenshot shows the first step of the registration process. At the top, there are three steps: '1) Login Details' (active), '2) Personal Details', and '3) Confirmation'. The form contains three input fields: 'Email*', 'Password*', and 'Confirm password*'. A blue 'NEXT' button is located at the bottom right. A decorative wireframe globe is visible in the bottom left corner.

1) Login Details > 2) Personal Details > 3) Confirmation

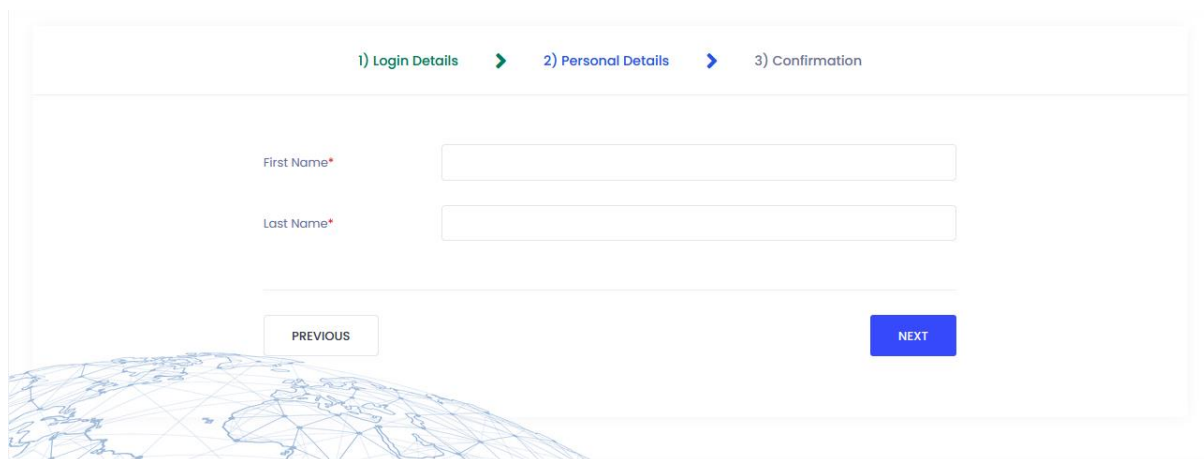
Email*

Password*

Confirm password*

NEXT

Step 2) Personal Details

The screenshot shows the second step of the registration process. The progress bar at the top shows '1) Login Details' as completed and '2) Personal Details' as the current step. The form contains two input fields: 'First Name*' and 'Last Name*'. A 'PREVIOUS' button is on the left and a blue 'NEXT' button is on the right. A decorative wireframe globe is visible in the bottom left corner.

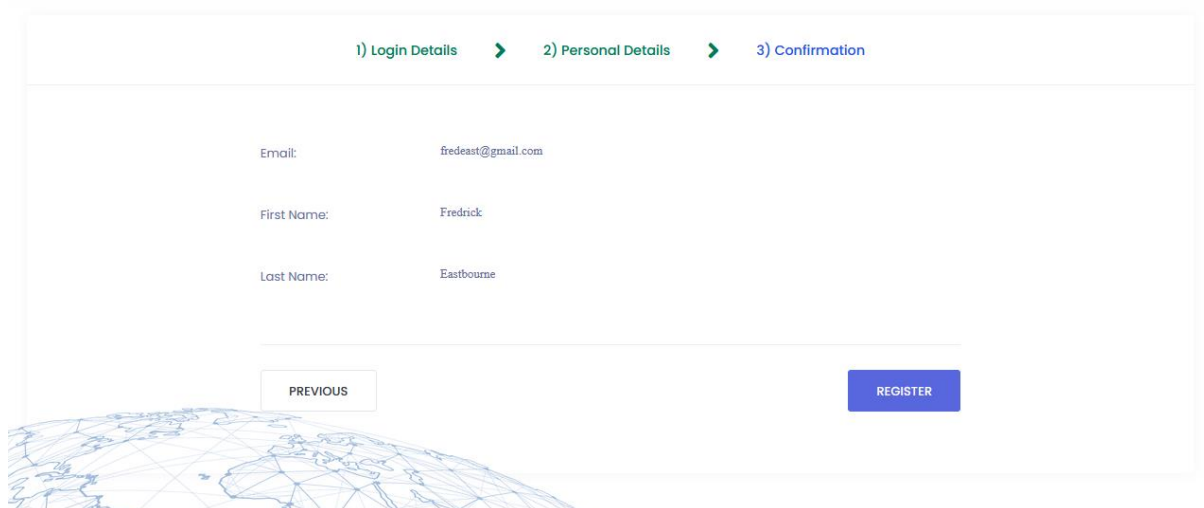
1) Login Details > 2) Personal Details > 3) Confirmation

First Name*

Last Name*

PREVIOUS NEXT

Step 3) Confirmation

The screenshot shows the third and final step of the registration process. The progress bar at the top shows all three steps: '1) Login Details', '2) Personal Details', and '3) Confirmation' as completed. The form displays the registered information: 'Email: fredeast@gmail.com', 'First Name: Fredrick', and 'Last Name: Eastbourne'. A 'PREVIOUS' button is on the left and a blue 'REGISTER' button is on the right. A decorative wireframe globe is visible in the bottom left corner.

1) Login Details > 2) Personal Details > 3) Confirmation

Email: fredeast@gmail.com

First Name: Fredrick

Last Name: Eastbourne

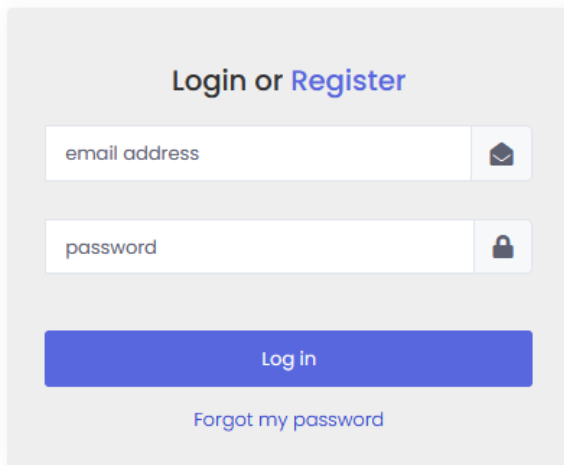
PREVIOUS REGISTER

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.

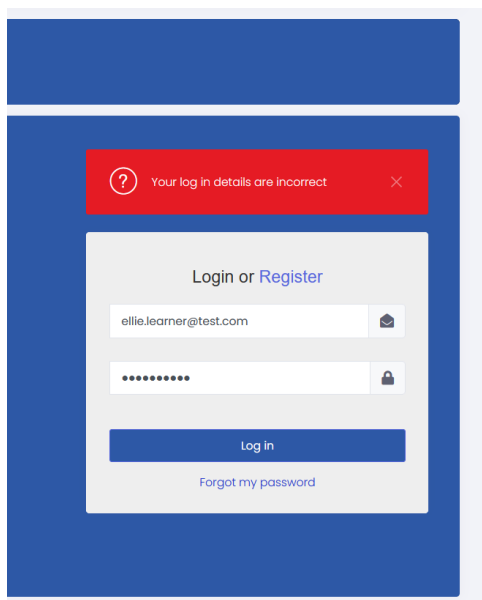
Once verified you will be able to log into the application.

5. Login



The image shows a 'Login or Register' form. It has a title 'Login or Register' with 'Login' in black and 'Register' in blue. Below the title are two input fields: 'email address' with an envelope icon and 'password' with a lock icon. Below these fields is a blue 'Log in' button and a blue link 'Forgot my password'.

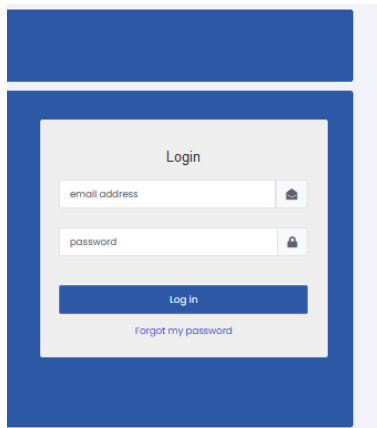
- Username – this is the email address used for registration.
- Email address – This can be changed from within your profile.
- Password – This can be changed from within your profile.
- Locked out – If you enter your password incorrectly 5 times or an admin user locks your account then the following message will be displayed 'Your log in details are incorrect'. Alternatively you can wait a period of time (usually an hour) before becoming unlocked.



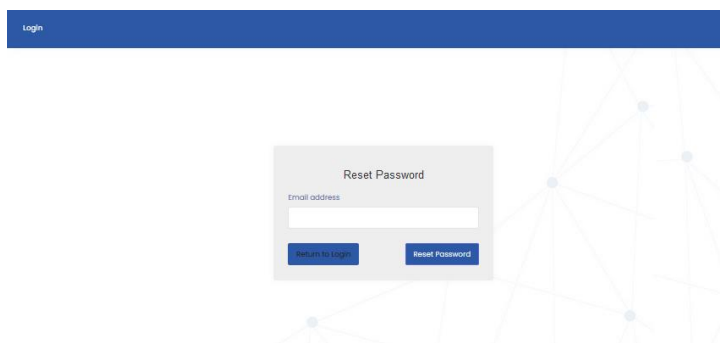
The image shows the 'Login or Register' form with a red error message at the top: '? Your log in details are incorrect'. The form fields are filled with 'ellie.learner@test.com' and '*****'. The 'Log in' button is blue and the 'Forgot my password' link is blue.

4. Forgotten Password/Reset Password

Please follow the 'Forgot my password' link on the log in page.

A screenshot of the login page. It features a blue header bar. Below it, a white box contains the title 'Login'. There are two input fields: 'email address' with an eye icon and 'password' with a lock icon. A blue 'Log in' button is below the fields. At the bottom of the white box is a link that says 'Forgot my password'.

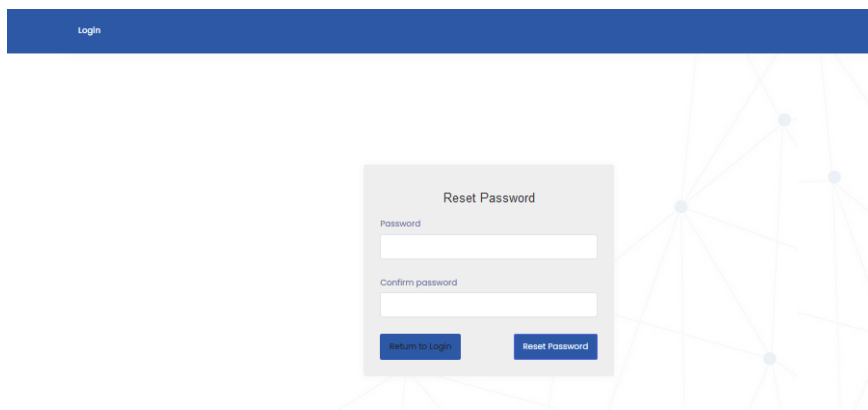
You'll be taken to a Reset Password Page

A screenshot of the 'Reset Password' page. It has a blue header bar with the word 'Login' on the left. The main content area has a white box titled 'Reset Password' with an 'Email address' input field. Below the field are two buttons: 'Return to Login' and 'Reset Password'. The background is light blue with a faint geometric pattern.

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

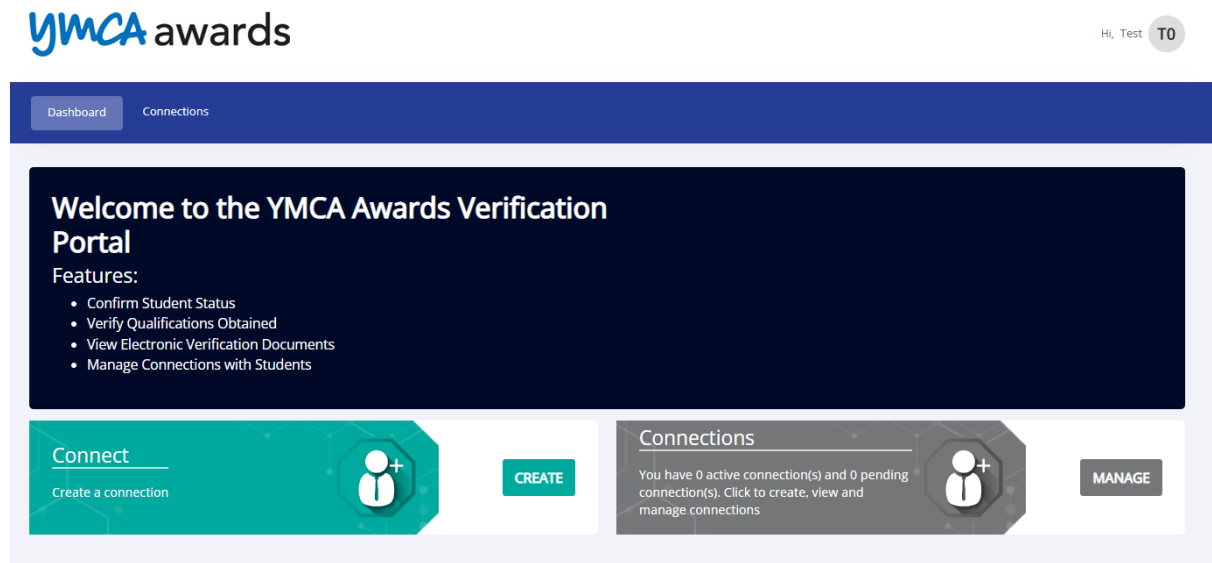
An email is then sent if there is a valid user profile associated with the email used here.

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

A screenshot of the 'Reset Password' page, showing the second step. It has a blue header bar with 'Login' on the left. The white box is titled 'Reset Password' and contains 'Password' and 'Confirm password' input fields. Below these are 'Return to Login' and 'Reset Password' buttons. The background is light blue with a faint geometric pattern.

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

5. Dashboard



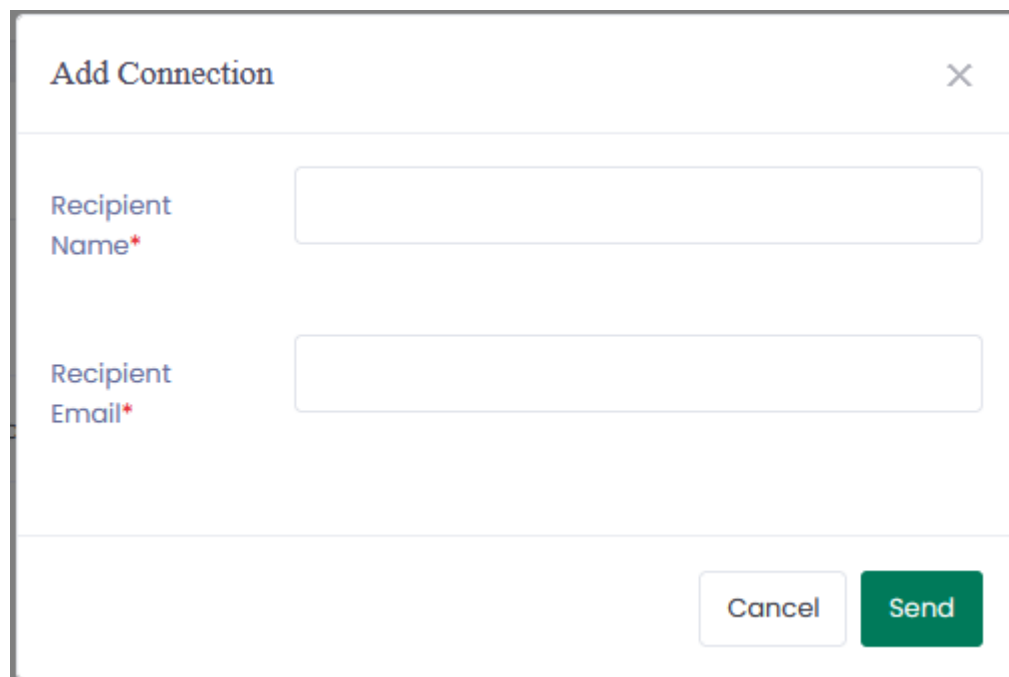
The screenshot shows the 'YMCA awards' dashboard. At the top right, it says 'Hi, Test' and 'T0'. Below the header, there are two tabs: 'Dashboard' and 'Connections'. The main content area has a dark blue header with the text 'Welcome to the YMCA Awards Verification Portal'. Below this, it lists 'Features:' with four bullet points: 'Confirm Student Status', 'Verify Qualifications Obtained', 'View Electronic Verification Documents', and 'Manage Connections with Students'. At the bottom, there are two main sections: 'Connect' and 'Connections'. The 'Connect' section has a green background and says 'Create a connection' with a 'CREATE' button. The 'Connections' section has a grey background and says 'You have 0 active connection(s) and 0 pending connection(s). Click to create, view and manage connections' with a 'MANAGE' button. Both sections feature a person icon with a plus sign.

1. Connect (Create)

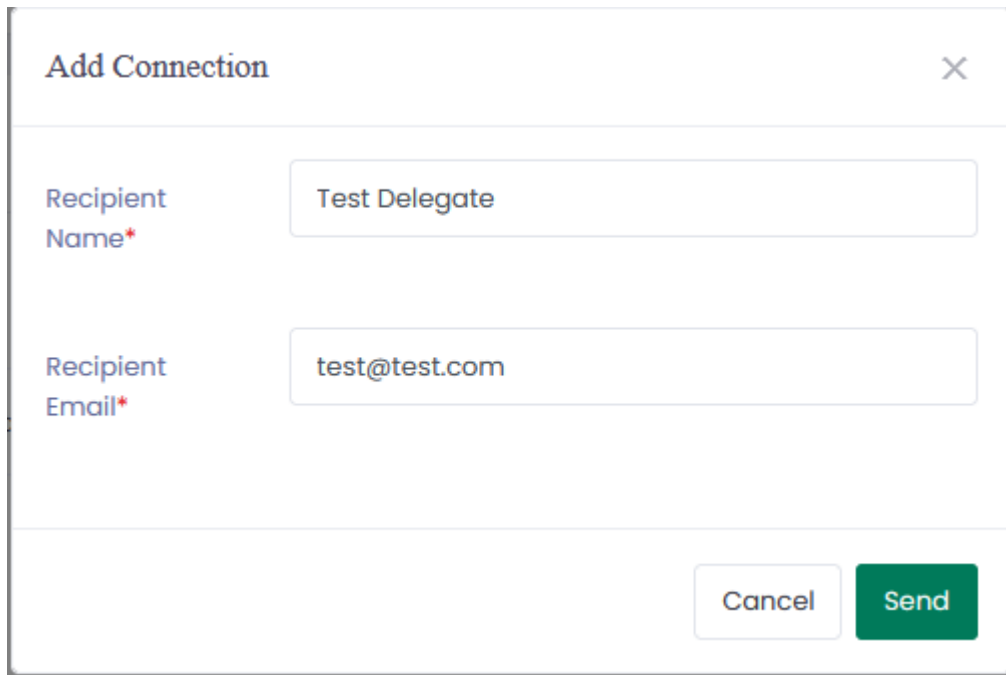
Once registered, you can request access to a learner's qualifications. By entering the learner's name and email address. If the learner in question is already registered on the portal and accepts the connection then you'll be able to immediately view their documents. If the learner has not yet registered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

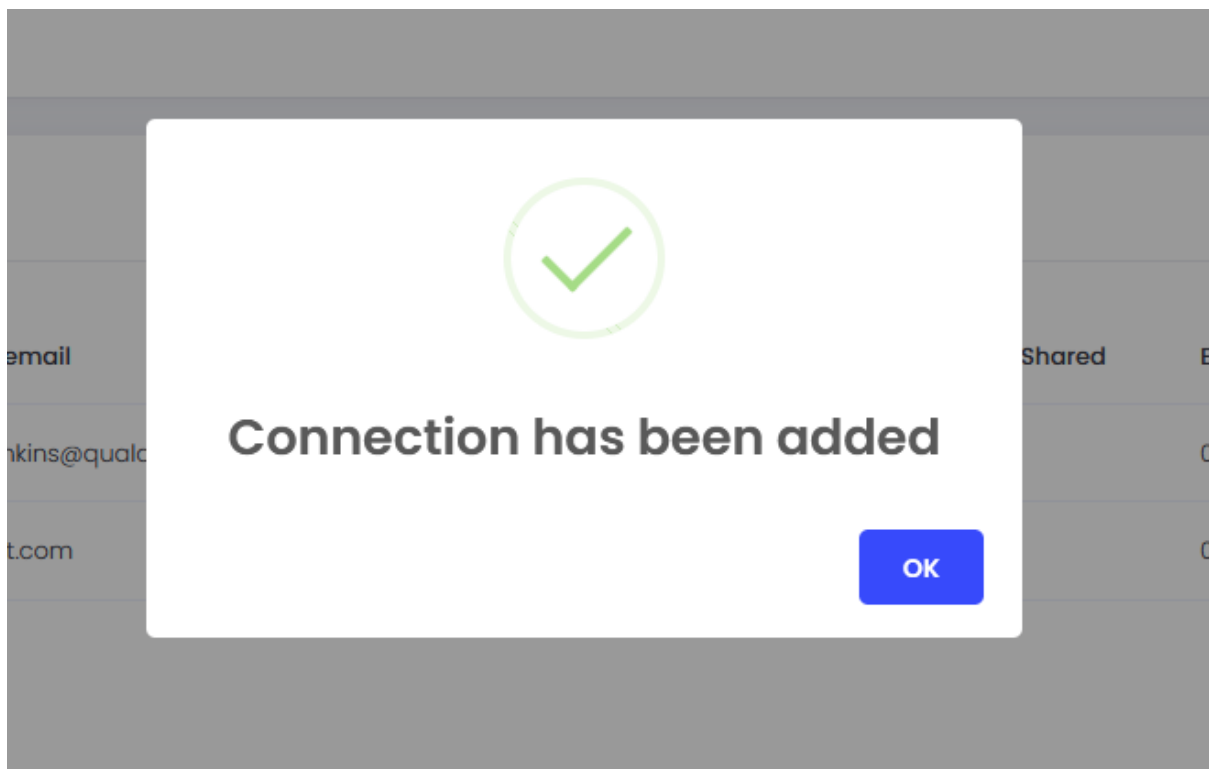


The screenshot shows a modal window titled 'Add Connection' with a close button (X) in the top right corner. Inside the modal, there are two input fields: 'Recipient Name*' and 'Recipient Email*'. Both fields are empty. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Send'.



The 'Add Connection' dialog box contains two input fields. The first field, labeled 'Recipient Name*', has the text 'Test Delegate'. The second field, labeled 'Recipient Email*', has the text 'test@test.com'. At the bottom right, there are two buttons: 'Cancel' and 'Send'.

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	 
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2. Connections (Manage)

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

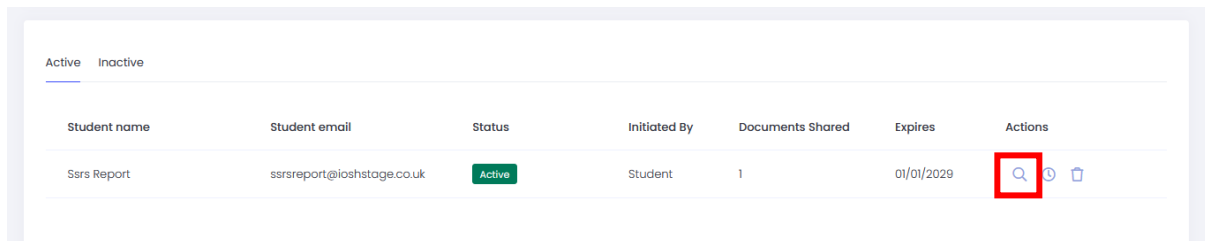
Active tab

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.



The screenshot shows a web interface with two tabs: 'Active' (selected) and 'Inactive'. Below the tabs is a table with the following columns: Student name, Student email, Status, Initiated By, Documents Shared, Expires, and Actions. A single row is visible with the following data: Student name: Srs Report, Student email: srsreport@ioshstage.co.uk, Status: Active (in a green box), Initiated By: Student, Documents Shared: 1, Expires: 01/01/2029. The Actions column contains three icons: a magnifying glass (highlighted with a red box), a document icon, and a trash can icon.

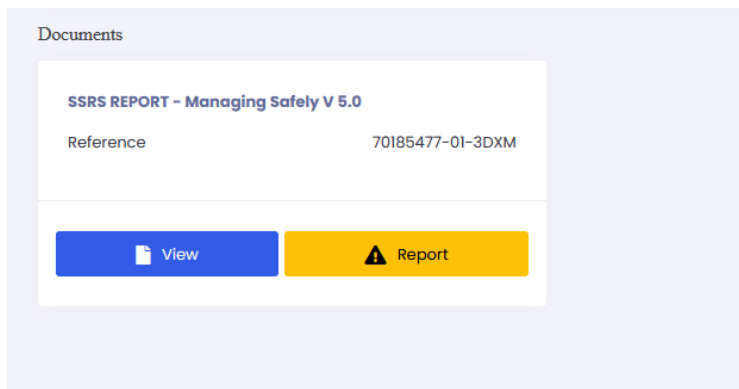
Student name	Student email	Status	Initiated By	Documents Shared	Expires	Actions
Srs Report	srsreport@ioshstage.co.uk	Active	Student	1	01/01/2029	  

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'

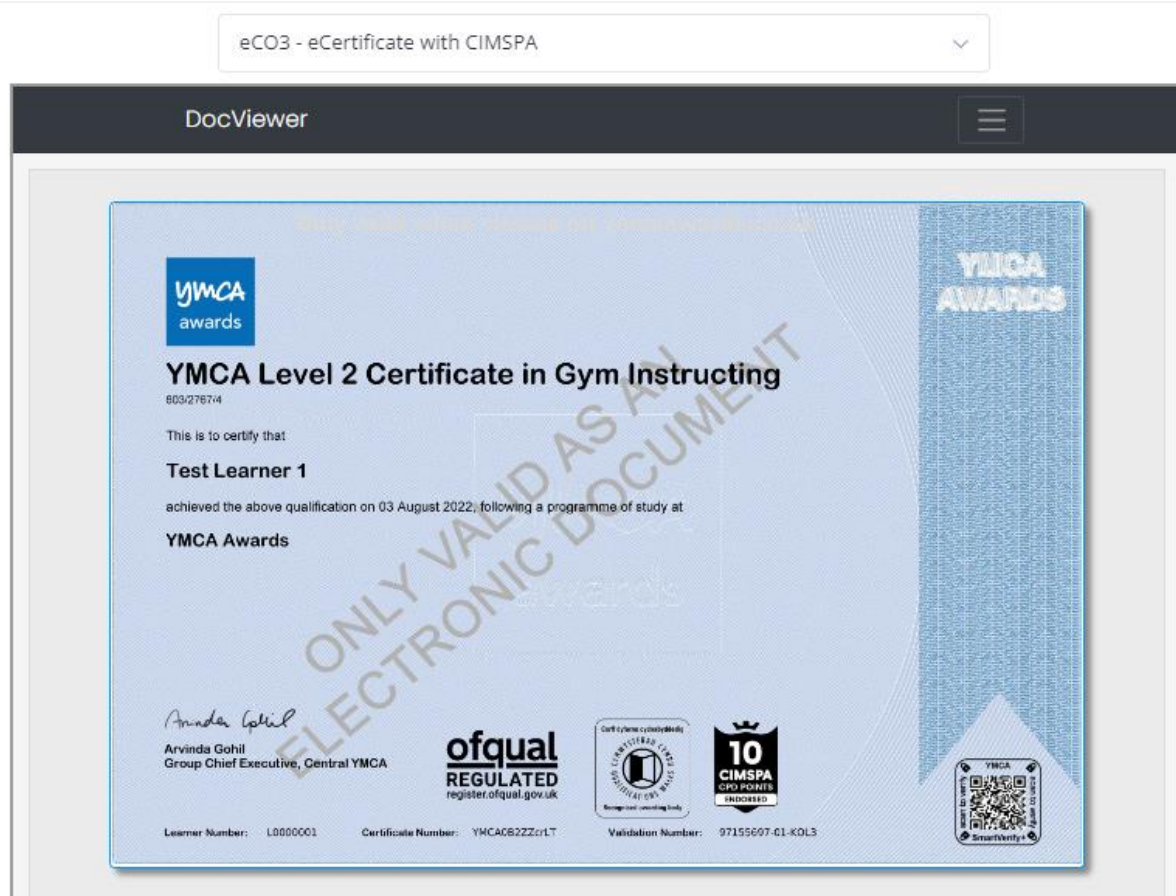
In order to actually view the document shared click on the view button in the screenshot below

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.



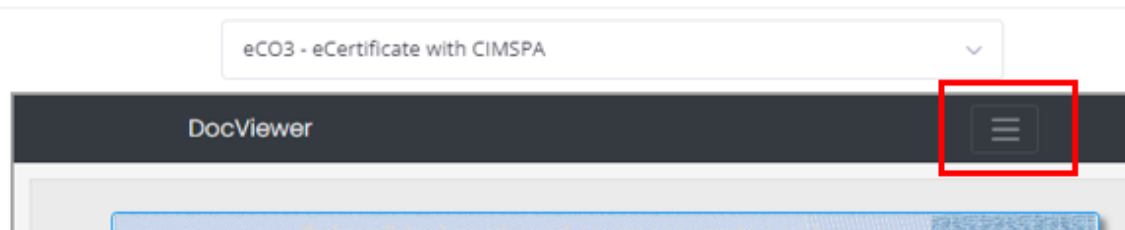
This then opens up a viewer and after a short time the student's available document for that course is then viewable.

Test Learner 1 - YMCA Level 2 Certificate in Gym Instructing >

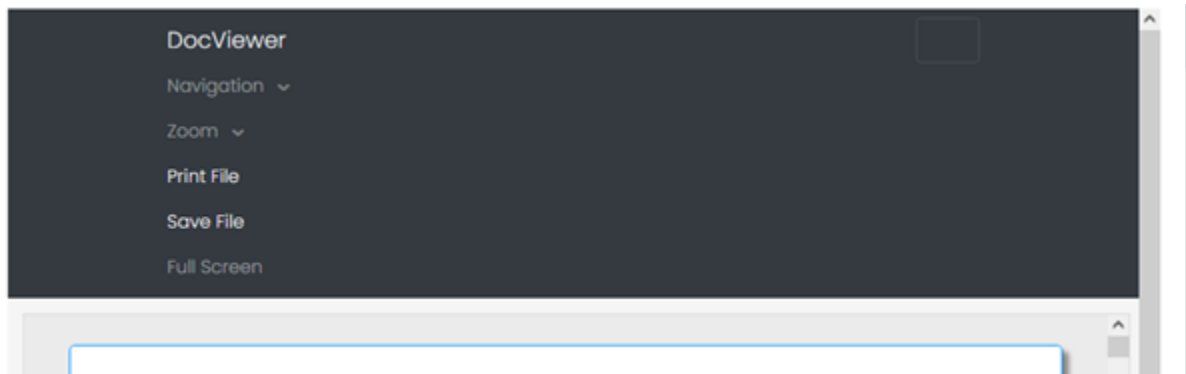


There are additional menu options available to you on the document viewer screen by clicking on the menu button on the red box indicated in the screenshot below.

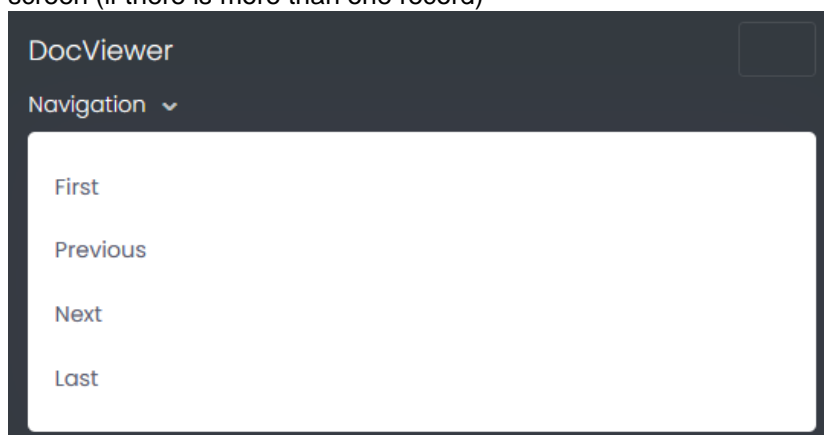
Test Learner 1 - YMCA Level 2 Certificate in Gym Instructing



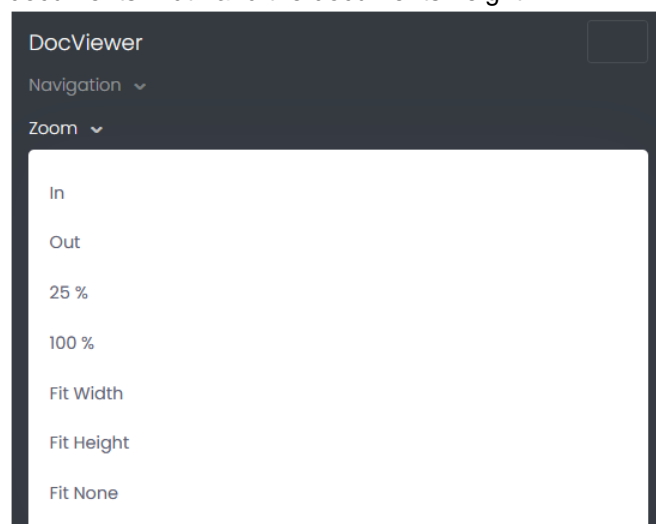
This then expands to reveal the following menu options

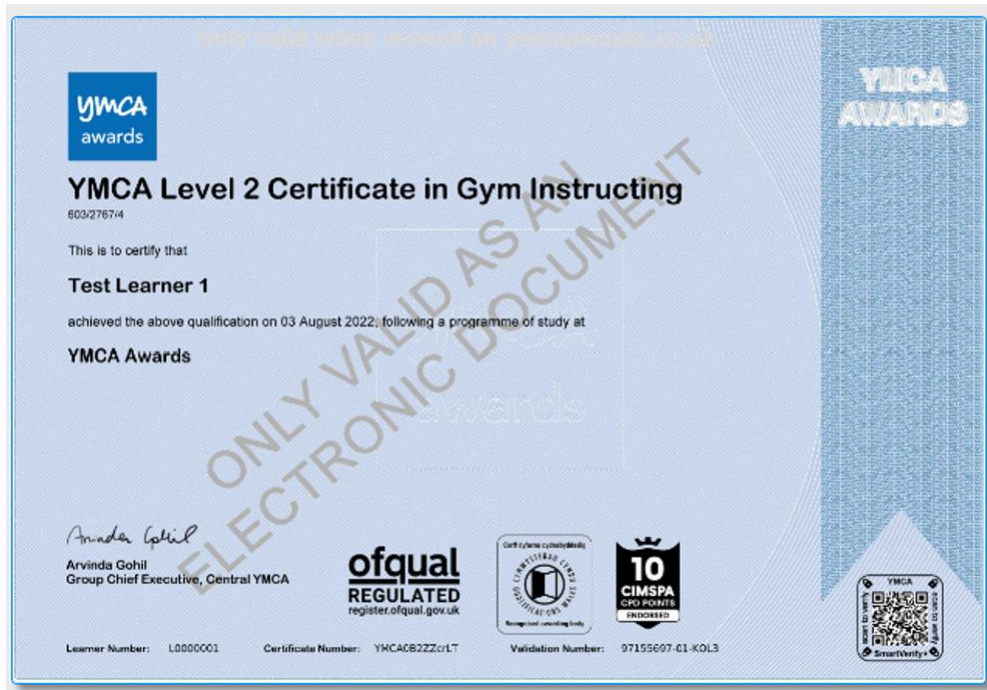


- Navigation – Allows you to look at the first, last, previous or next pages of the document on screen (if there is more than one record)




- 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.

Active Inactive						
Student name	Student email	Status	Initiated By	Documents Shared	Expires	Actions
Srs Report	srsreport@ioshstage.co.uk	Active	Student	1	01/01/2029	

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

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

Request Connection Extension

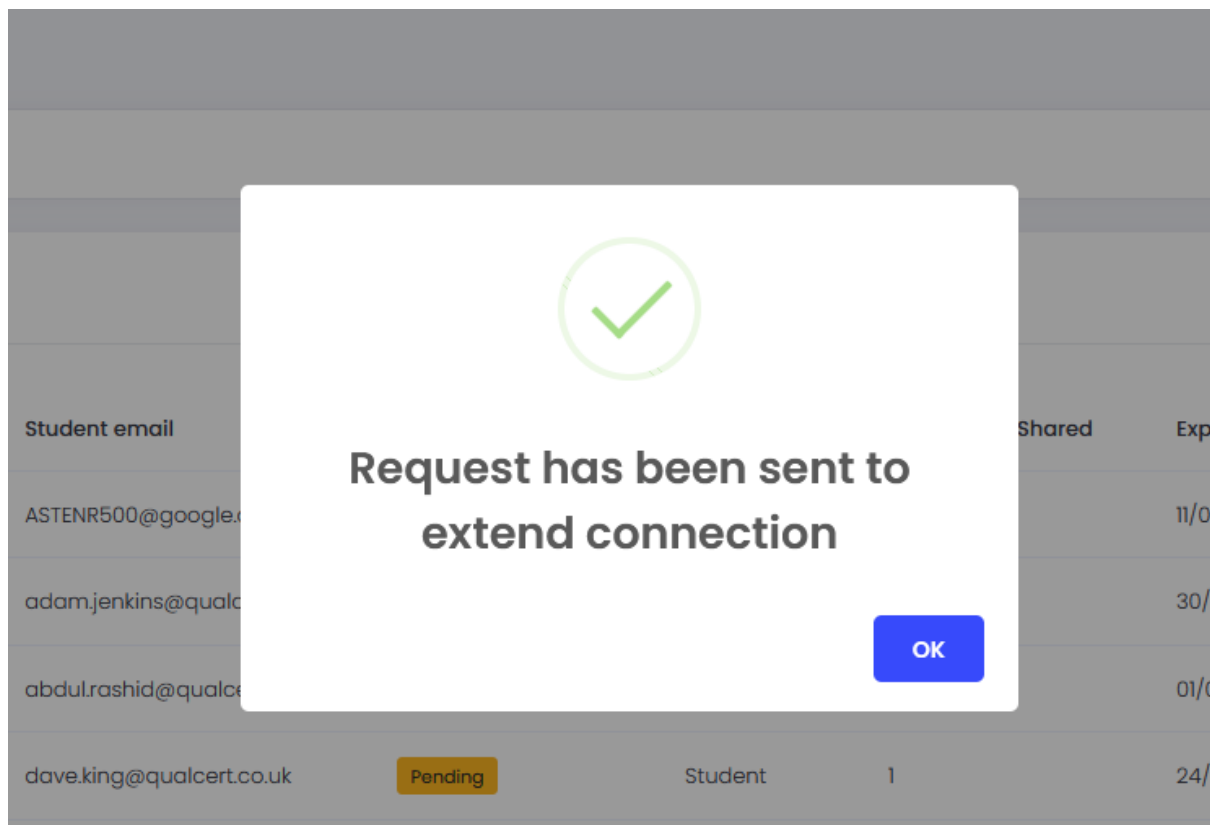
Expiry Date

30/03/2022

Extend Date*

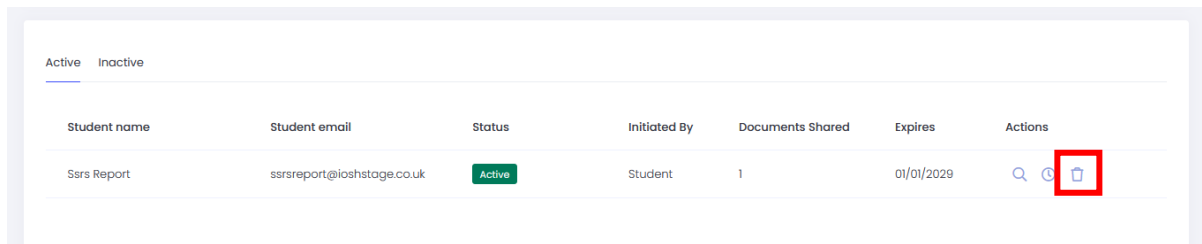
Cancel




Save



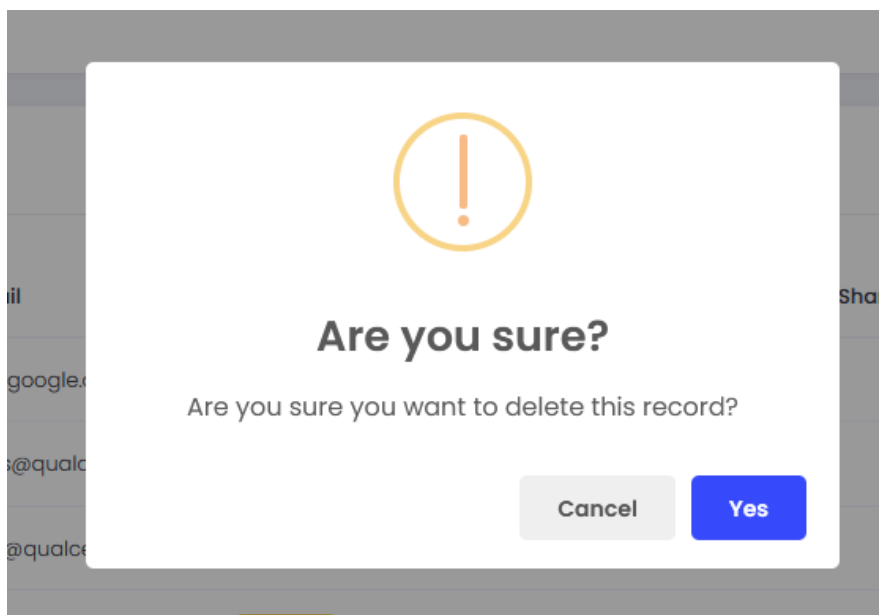
At this stage an email is sent to the learner requesting an extension. Once the learner approves then the new requested date will then become the new extension date going forward.

Cancel – The connection can be cancelled by you at any time.

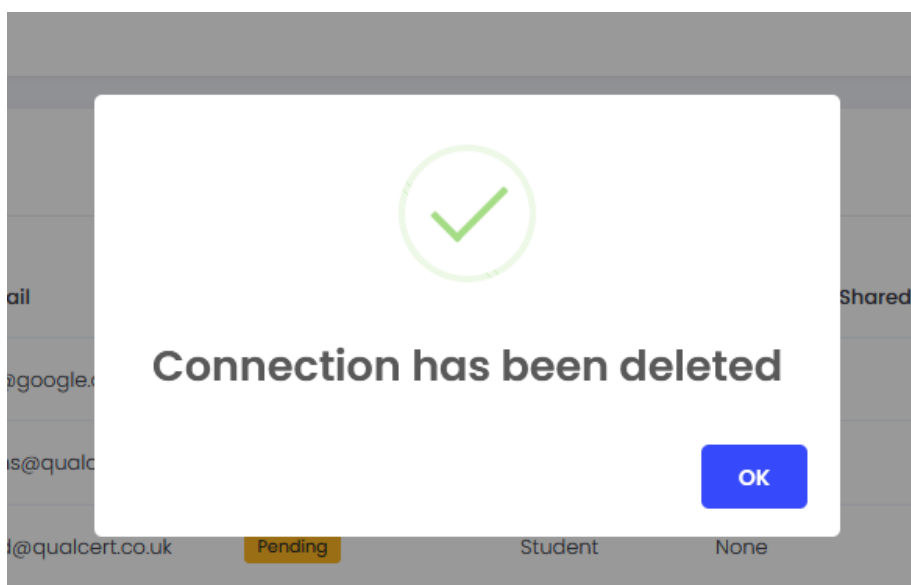


Student name	Student email	Status	Initiated By	Documents Shared	Expires	Actions
Srs Report	ssrsreport@ioshstage.co.uk	Active	Student	1	01/01/2029	  

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



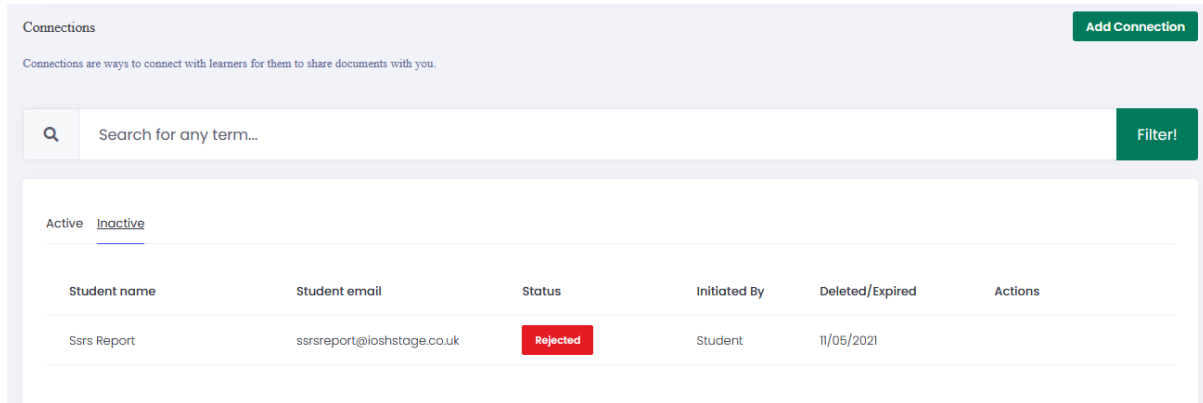
Once the 'Yes' option is selected then a confirmation message is displayed.



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.



Connections Add Connection

Connections are ways to connect with learners for them to share documents with you.

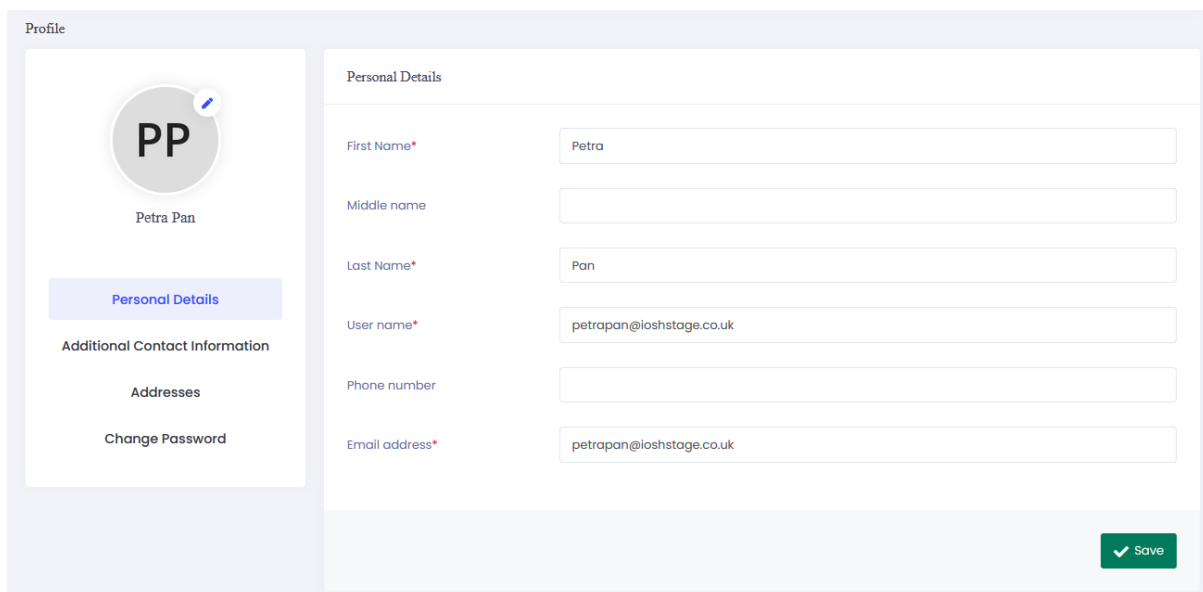
Search for any term... Filter!

Active Inactive


Student name	Student email	Status	Initiated By	Deleted/Expired	Actions
Ssrs Report	ssrsreport@ioshstage.co.uk	Rejected	Student	11/05/2021	

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.



Profile



Petra Pan

Personal Details

Additional Contact Information

Addresses

Change Password

Personal Details

First Name*

Middle name

Last Name*

User name*

Phone number

Email address*

✓ Save

Photo

Personal details

Additional Contact information

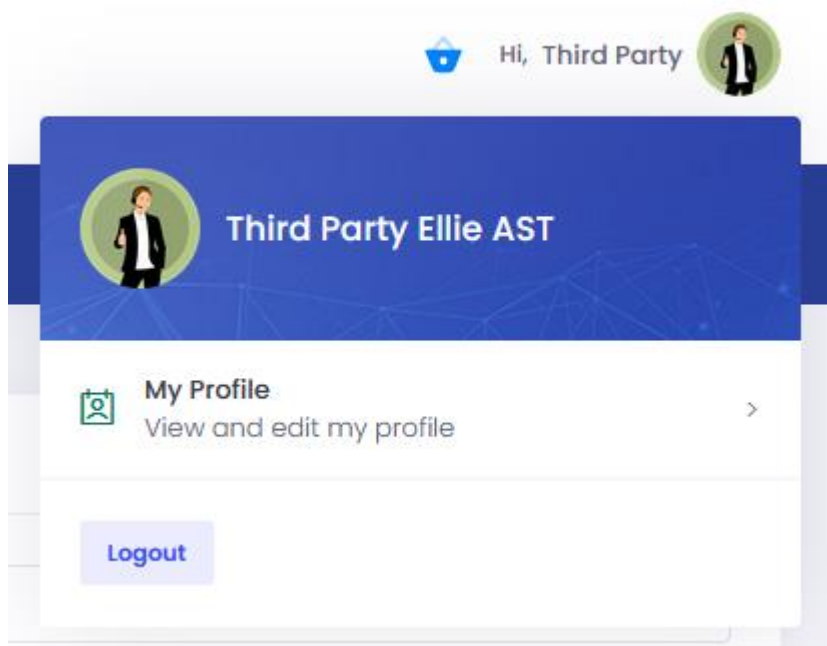
- Phone numbers
- Email addresses
- Social media

Addresses

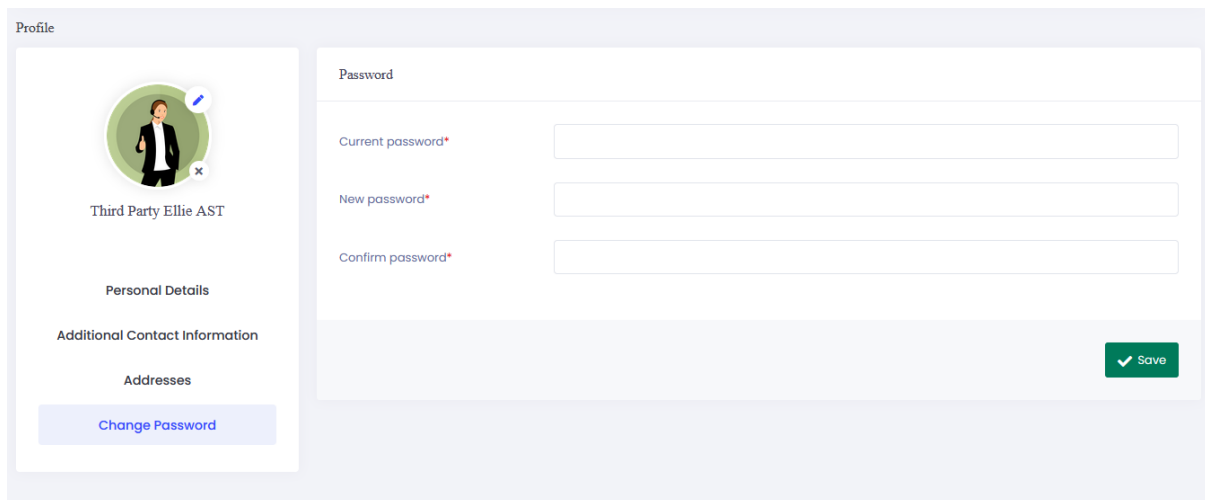
Change password

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.

Profile



Third Party Ellie AST

Personal Details

Additional Contact Information

Addresses

[Change Password](#)

Password

Current password*

New password*

Confirm password*

[Save](#)

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.