

Accessing the OPITO DSI Portal

Training Provider Administrator



Device and Browser Compatibility

The OPITO DSI portal has been developed to be fully compatible with all modern internet browsers and to display correctly on smartphones, tablets, netbooks, laptops and full desktop monitors.

Log on to the Portal

Connect to URL – <https://opito-bosiet.atlasknowledge.com>

Enter your email address and password, press Enter or click on the Login button to continue ❶.

Further Information / Help

Links to view the Terms & Conditions are on the log in page ❷, along with links to both Atlas Knowledge's and OPITO's web/social presences ❸. There is also a link to the online help system ❹.



Forgot Your Password?

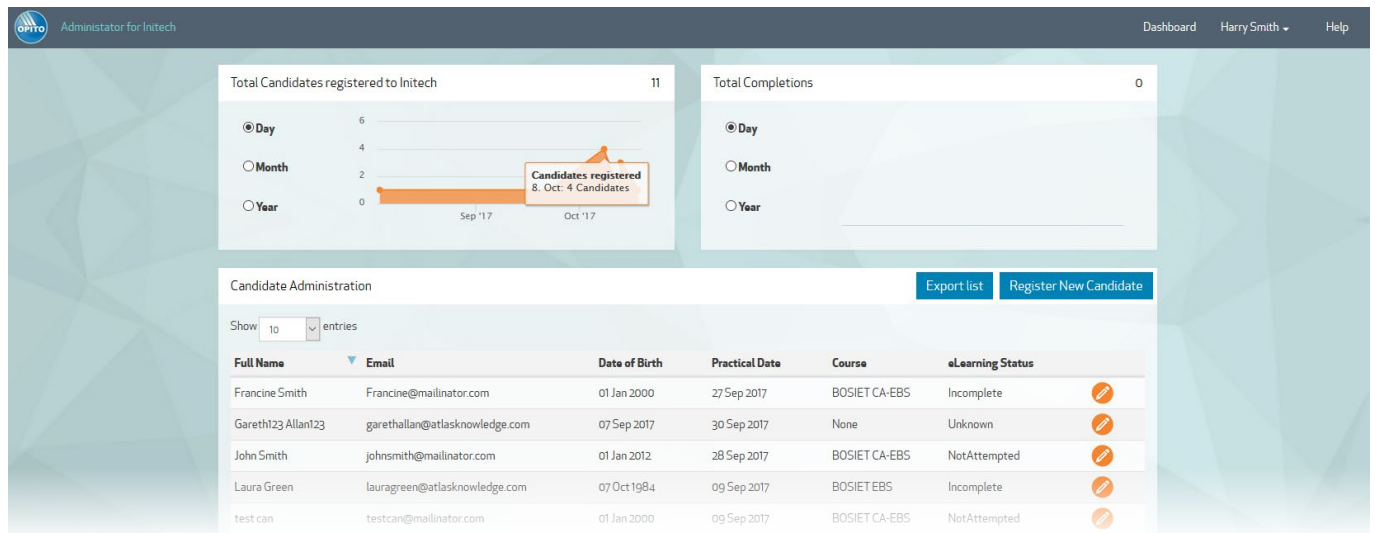
To reset your login password, select the 'Forgotten password?' link on the login page ❶. You will then be asked to enter your registered email. Once validated, the portal will send a unique password reset link to your email inbox. If you cannot remember your registered email address, you should contact Atlas Technical Support at support@atlasknowledge.com or by phoning +44 (0)844 247 2121

Dashboard

When you have successfully logged in as a Training Provider (TP) Administrator you will be presented with the main dashboard screen.

On the dashboard are several Data Analytic tiles to show you the number of candidates registered with your company, as well as the number of course completions within the portal. These report tiles can be manipulated to show the data for selected periods.

Beneath the data tiles is the Candidate Administration section, with a table of all currently registered candidates.



Register a new Candidate

Select the 'Register New Candidate' button to access the Candidate registration form.

Enter all the required details for the Candidate.

Specify the Practical Date on which they are scheduled to attend your training facility for the practical element of the BOSIET course. It is recommended that the candidate is given at least 7 days to complete the eLearning course prior to the date of the practical training. If the period is less than this, you will receive a warning message, which can be dismissed if required.

The Candidate Registration Form contains the following fields: First Name, Last Name, Email, Phone No, Date of Birth, Practical date, and Selected course. A 'Create' button is located at the bottom right of the form. A warning message is displayed below the form, stating: 'It is recommended to allow at least 7 days between registration and scheduled practical date, to allow the Candidate sufficient time to complete the online course.'

Finally, select the course on which the candidate is to be assigned (choose between BOSIET with EBS, BOSIET with CA-EBS and Tropical BOSIET).

To complete the registration, select the 'Create' button. A welcome email will be sent to the candidate's email address with instructions on how to complete the portal registration and access the online course.

Registration form details:

- Candidate No:
- Date of Birth:
- Practical date:
- Selected course: BOSIET CA-EBS
- Buttons: Cancel, Create

Register an existing Candidate

To move a candidate from one Training Provider to another, the Candidate must first be Un-Registered from the previous TP (see separate section below on how to Un-Register a Candidate). The candidate will have received an email to advise them this has been completed.

Register the candidate as if they were new to the system. The system will detect the duplicate email address and, assuming the candidate has been successfully un-registered by the previous Training Provider, will notify the Admin that the candidate has already been created, but will allow the registration fields to be modified, before continuing the registration process.

Candidate has already been created
Update their existing details below.

When the registration is complete, the candidate will receive a new Welcome Email with instructions on how to activate their account.

Export list of Candidates

Select the 'Export List' button to download an Excel file containing the registration details of all the registered candidates.


Edit a Candidate

In the Candidate Administration section, each Candidate is displayed in a table which can be filtered to help locate the Candidate whose details you wish to edit.

To the right of the Candidate details is an Edit icon:  Select this icon to access the full Candidate registration details.

Candidate Administration interface details:

- Buttons: Export list, Register New Candidate
- Show: 10 entries

Full Name	Email	Date of Birth	Practical Date	Course	eLearning Status	
Tony Stark	tonystark@starkindustries.com	15 Aug 1968	25 Oct 2017	BOSIET CA-EBS	NotAttempted	

- Form fields for Tony Stark:
 - Full Name: Tony
 - Email:
 - Date of Birth:
 - Practical Date:
 - Course:
 - eLearning Status:
 - Clear button
- Showing 1 to 1 of 1 entries (filtered from 16 total entries)
- Navigation: Previous, 1, Next

Candidate Registration Details

First Name
Last Name
Email
Phone No
Date of Birth
Practical date

Update the details as required and select the 'Update' button to submit.

Unlock a failed Registration

When a candidate attempts to register on the portal for the first time, they must enter their Date of Birth as a security validation. Should they enter this incorrectly three times, their registration is locked and they are advised to contact their Training Provider.

To unlock the account, click on the edit icon next to the Candidate in the Candidate Administration table and click the 'Unlock' button to allow the Candidate a further three attempts to complete their registration. Please verify the correct Date of Birth with the Candidate and ensure this is entered correctly in the registration form.

Candidate Registration Details

Candidate account locked
This candidate incorrectly entered their date of birth when trying to register, please confirm with the candidate their date of birth is correct.

First Name
Last Name
Email

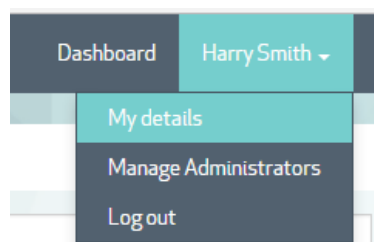
Un-Register Candidate from your company

If a Candidate needs to change their registration with your Training Company to another Training Provider, click on the Edit icon next to the Candidate in the Candidate Administration table and select the 'Un-register' button to remove the candidate's scheduled practical. This does not delete the candidate registration details from the portal but it does allow another Training Provider to register them to their company.

Edit Personal Details

On the top menu bar, select your name to open the user menu. From here select 'My details'.

On this screen you can update your name and email address as well as update your current password.

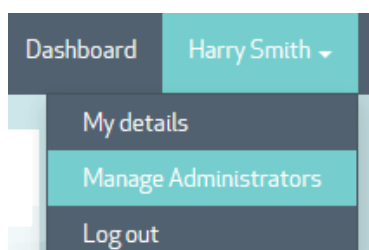


Edit Training Provider Details

You can edit the details of the Training Provider for whom you are an administrator on the same page where you can edit your personal details.

Add or Edit Further Administrators

On the top menu bar, select your name to open the user menu. From here select 'Manage Administrators'.



On this screen is a table of all the other registered Administrators for your company.

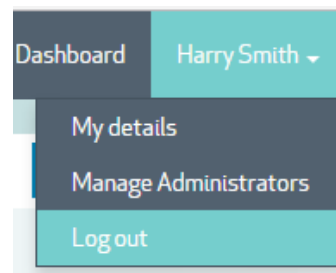
Administrators can be set to Active or Inactive by selecting the or icons to the right of the Administrator's name. You cannot edit the Status of your own account.

Select the icon to edit the Name and Email address for the selected Administrator.

Use the 'Register Administrator' button to register new Administrators.

Logout

On the top menu bar, select your name to open the user menu. From here select 'Log out' to end this session and return to the log in screen.



Further questions

If you have any further questions or comments please contact Atlas Technical Support at support@atlasknowledge.com or by phoning +44 (0)844 247 2121