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INTRODUCTION

The IMI’s Digital Certificates eModule is a secure online portal providing access to digital copies of candidate Qualification, Quality Assured Programmes (QAP) and IMI Accreditation achievement.

CERTIFICATES

The centre portal enables Centre users to have an instant view of all centre related achievements and certificates as they roll off the production line. Digital copies are provided in batches which can be downloaded to secure PDF format.

The purpose of this document is to provide step by step instructions on all processes which relate to Centre access to the IMI’s Digital Certificates eModule.

ACCESS

To access this system, please use the following link:
<https://veri.theimi.org.uk/>

All Centre coordinators will be provided with access in the first instance. The username will be the users email address. For additional security, we ask that users go through the forgotten password process for the initial logon.



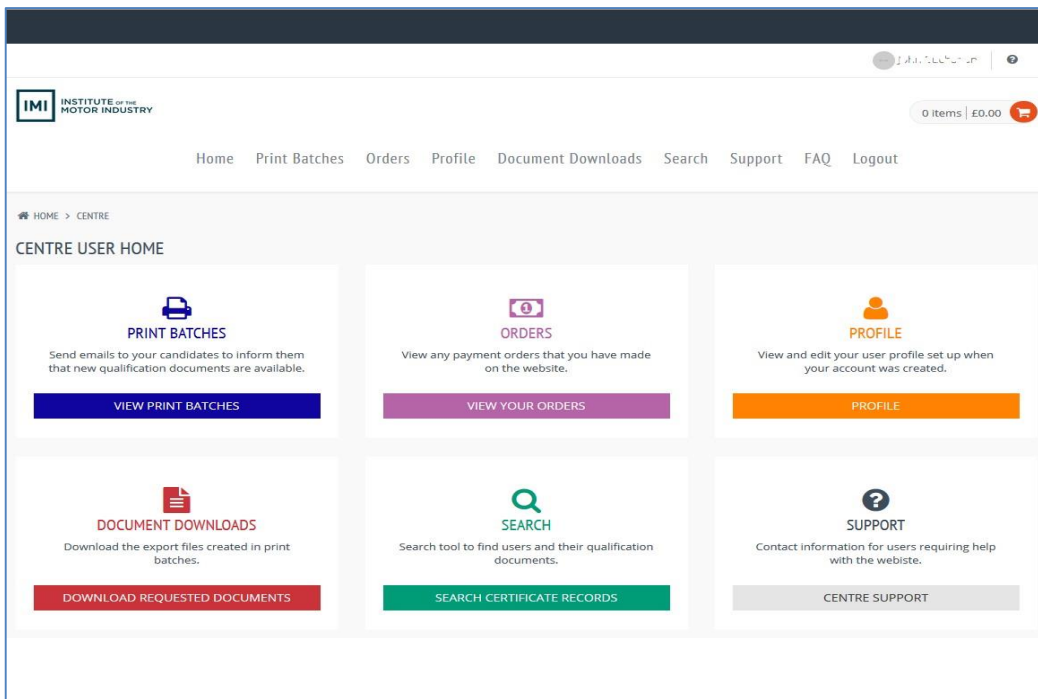
If Centres require additional users to have access to this system, Centre coordinators need to email cas@theimi.org.uk with the following information:

- Centre name and number
- Users full name
- Users email address

HOME PAGE

The Centre home page is split into sections:

- Print batches
- Orders
- Profile
- Document Downloads
- Search
- Order process
- Report a problem
- Support
- FAQ



Each section can be accessed via the menu running across the top of the screen or via the icons in the middle of the page. Each page also has a help section in the top right hand corner. Users can always return to the home page by clicking Home or the IMI logo.

PRINT BATCHES

Centre users can view print batches created in the IMI's Digital Certificate system for certificate claims made via their Centre. Once a certificate batch has been successfully printed, they will become active and are available to be viewed.

Page < 1 > of 4 | View 10 records | Found total 32 records

ID	Status	Started	Finished	User	Records	Email Status	Type	Reference	Actions
8520	COMPLETE	17/08/2017	17/08/2017	CarlyH	1	?	Certificate		VIEW
8472	COMPLETE	15/08/2017	15/08/2017	CarlyH	1	?	Certificate		VIEW
8411	COMPLETE	09/08/2017	09/08/2017	CarlyH	1	?	Certificate		VIEW
8157	COMPLETE	14/07/2017	14/07/2017	CarlyH	1	?	Certificate		VIEW
8110	COMPLETE	12/07/2017	12/07/2017	RikkiH	1	?	Certificate		VIEW
8096	COMPLETE	10/07/2017	10/07/2017	RikkiH	1	?	Certificate		VIEW
8042	COMPLETE	04/07/2017	04/07/2017	RikkiH	1	?	Certificate		VIEW
7906	COMPLETE	19/06/2017	19/06/2017	SarahJ	1	?	Certificate		VIEW
7761	COMPLETE	06/06/2017	06/06/2017	SarahJ	4	?	Certificate		VIEW
7269	COMPLETE	13/04/2017	13/04/2017	JohnB	1	?	Certificate		VIEW

Page < 1 > of 4 | View 10 records | Found total 32 records

From within this area, Centre users can select batches of certificates and download secure PDF versions to a location of their choice.

Once the batch has been located, the centre user can click the View button to see certificates contained within that batch:

The screenshot shows the 'CERTIFICATE' page in the IMI system. At the top, there is a navigation bar with links for Home, Print Batches, Orders, Profile, Document Downloads, Search, Support, FAQ, and Logout. Below this, a breadcrumb trail reads 'HOME > CENTRE > PRINT BATCHES > CERTIFICATE'. The main content area is titled 'CERTIFICATE' and features a 'DOCUMENT DOWNLOADS' tab. Below the tab, the 'PRINT BATCH ID: 7761' is displayed. A pagination control shows 'Page 1 of 1 | View 10 records | Found total 4 records'. A 'Please select' dropdown and a 'SUBMIT' button are also present. The main table lists four certificates with columns for Certificate Number, Documents, Candidate Number, First Name, Last Name, Email, and Actions. The Actions column contains a 'RESET' button and a dropdown menu with options like 'VIEW CERTIFICATE DETAILS', 'Order Proof of qualification', 'Order Certificate', and 'Report error'.

<input type="checkbox"/>	Certificate Number	Documents	Candidate Number	First Name	Last Name	Email	Actions
<input type="checkbox"/>							RESET
<input type="checkbox"/>	01656083-01-1000		42250116	Alison	Wardley		VIEW CERTIFICATE DETAILS
<input type="checkbox"/>	01656084-01-1000		42250116	Alison	Wardley		Order Proof of qualification Order Certificate Report error
<input type="checkbox"/>	01656085-01-1000		42250116	Alison	Wardley		VIEW CERTIFICATE DETAILS
<input type="checkbox"/>	01656086-01-1000		42250116	Alison	Wardley		VIEW CERTIFICATE DETAILS

Centre users can use the radio buttons on the left hand side of the page to select one or multiple certificates from the batch. Once the certificates have been selected, the user can use the drop down menu to select Export and click on Submit. A pop up will be displayed where they can insert a file name and description before clicking Export again.

PDF versions of all selected certificates will then show in the Document Downloads area. Depending on the number of certificates selected, it may take a little while for the PDF's to generate. PDF's are only available in the Document Downloads area for 24 hours after they have been generated.

Centre users can also order duplicated and re-printed certificates, proof of qualification letters and can report any errors from this area. This is done by clicking on the arrow next to each line of data and selecting the relevant option – more information on these items are included later in this document.

Centre users can view individual certificate details by clicking View Certificate Details. This will then display the Document Card which includes information such as candidate name, certificate number, qualification number etc.

CERTIFICATE DETAILS
✕

DC Certificate Number	01653993-01-1800
Fullname	Elison Jane Winney
Candidate Number	42251170
Qualification Number	603/1465/5
Grade	Pass
Issue Date	06/06/2017
Centre	Fanshaws
Expiry Date	
Description1	

PRINT
CLOSE

Certificates issued before 1st November 2017 will only have the Document card available. PDF versions of certificates are only available for certificates issued on or after this date.

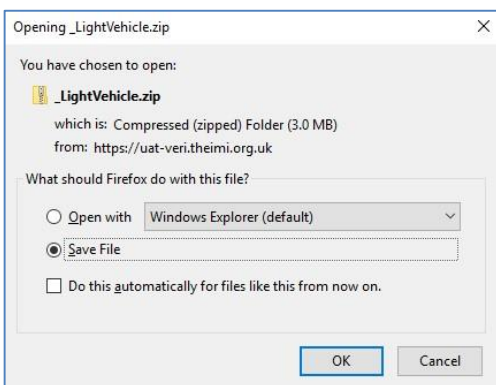
DOCUMENT DOWNLOADS

Once Centre users have generated PDF version of certificates from the Print Batches area, they will be available here:

On each row of data, users will see the status column. These statuses are as follows:

- Pending – the PDFs are still being generated
- Finished – the PDFs are available to be downloaded
- Expired – the PDFs were generated more than 24 hours ago

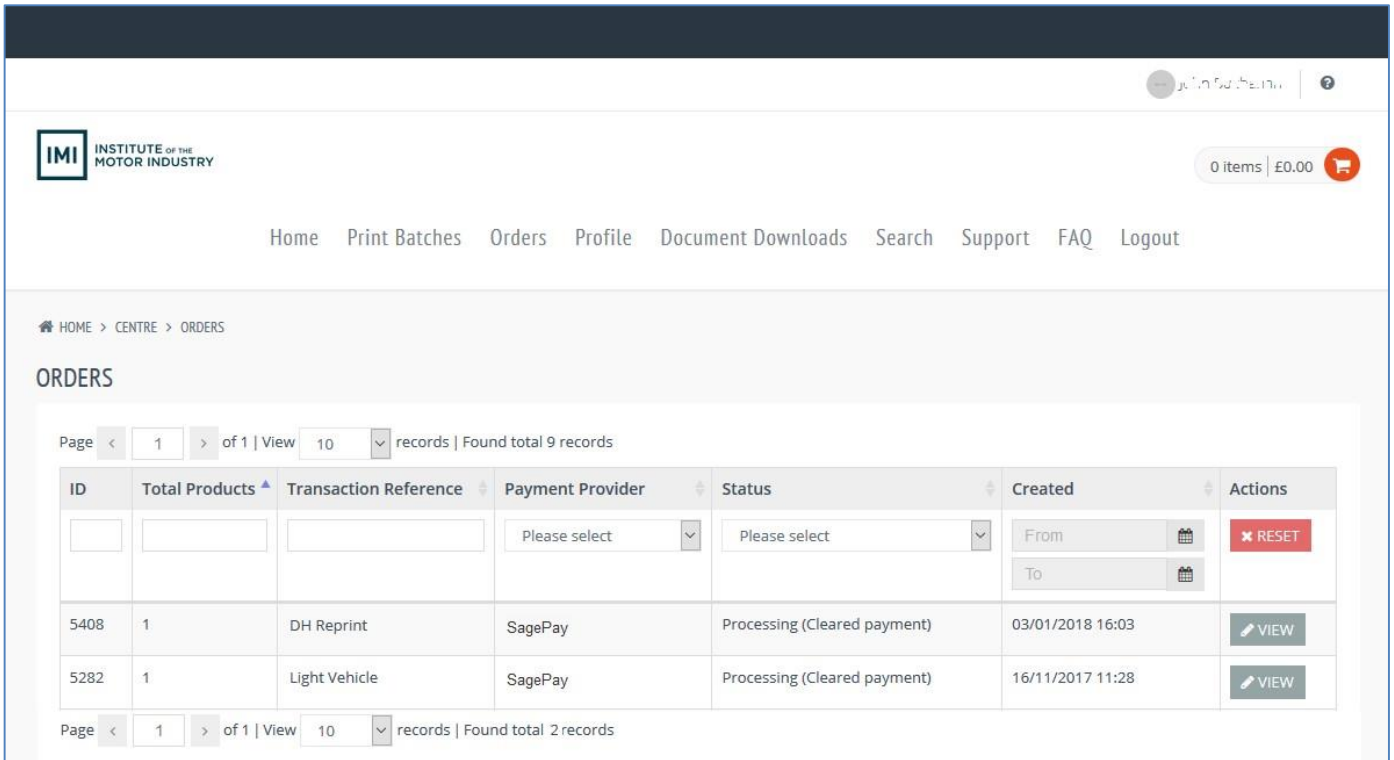
To download the PDFs, users will need to click on Download. This will present the user with an option to Open or Save (this may look different depending on the browser used):



Once the .zip file has been opened/saved, the user will have access to PDF versions of the certificates. It is important to remember that these PDFs are NOT to be printed. Any printed versions need to be ordered via this website.

ORDERS

This is where all previous orders made through this system will be displayed:



Page < 1 > of 1 | View 10 records | Found total 9 records

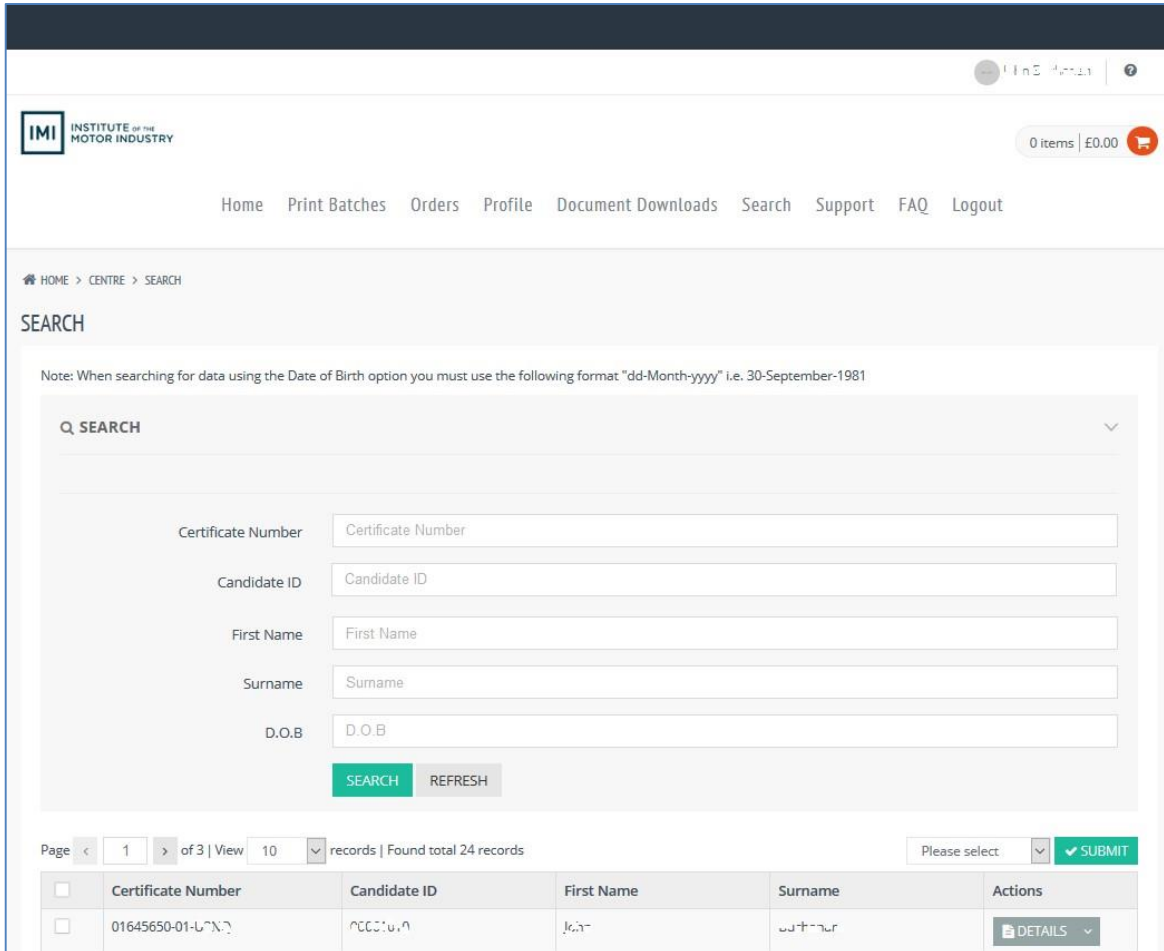
ID	Total Products	Transaction Reference	Payment Provider	Status	Created	Actions
			Please select	Please select	From To	RESET
5408	1	DH Reprint	SagePay	Processing (Cleared payment)	03/01/2018 16:03	VIEW
5282	1	Light Vehicle	SagePay	Processing (Cleared payment)	16/11/2017 11:28	VIEW

Page < 1 > of 1 | View 10 records | Found total 2 records

To view the full details of each order, the user will click View. This will display items such as a summary, delivery and billing details.

SEARCH

As well as being able to view certificate details and order duplicate certificates from the Print Batches area, users can also use the Search page to search for individual candidate achievement certificates:



IMI INSTITUTE OF THE MOTOR INDUSTRY

0 items | £0.00

Home Print Batches Orders Profile Document Downloads Search Support FAQ Logout

HOME > CENTRE > SEARCH

SEARCH

Note: When searching for data using the Date of Birth option you must use the following format "dd-Month-yyyy" i.e. 30-September-1981

Q SEARCH

Certificate Number

Candidate ID

First Name

Surname

D.O.B

Page 1 of 3 | View records | Found total 24 records

Please select

<input type="checkbox"/>	Certificate Number	Candidate ID	First Name	Surname	Actions
<input type="checkbox"/>	01645650-01-6-2021	0000000	John	Smith	<input type="button" value="DETAILS"/>

Search criteria available are as follows:

- Certificate number
- Candidate number
- First name
- Surname
- Date of birth

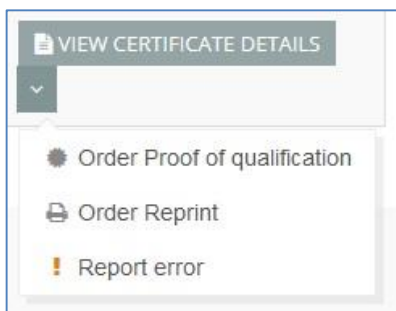
Once the details are on screen, Centre users can click Details to see the Document Card for full information or the arrow to order duplicate certificates.

ORDER PROCESS

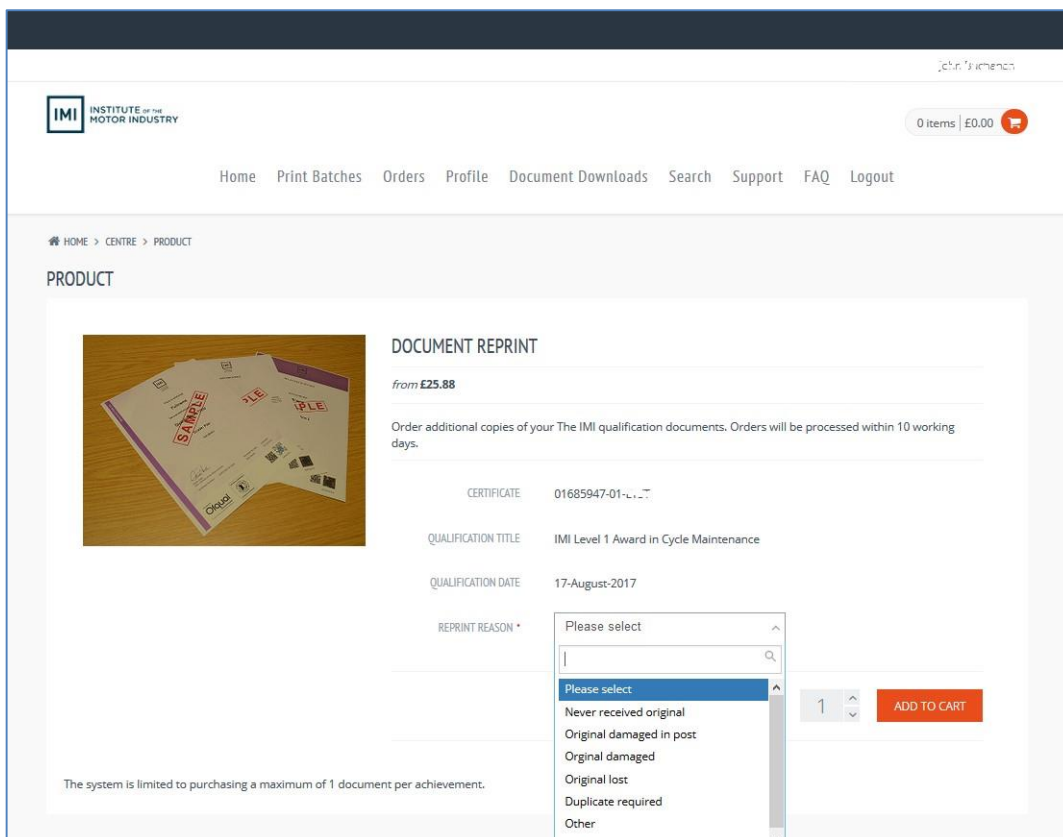
Ordering duplicate certificates or proof of qualification letters is on an individual candidate and certificate basis. This process can be completed from the Print Batches or Search areas.

Centre users will have the choice of using Centre Credits or SagePay to place their orders. Centre credits mean that Centres will be invoiced as per their current invoicing agreements. SagePay will allow Centre users to pay for their order via a debit/credit card.

Once the candidate and certificate records have been located, users can select the arrow next to the data before clicking Order reprint or Order Proof of Qualification:

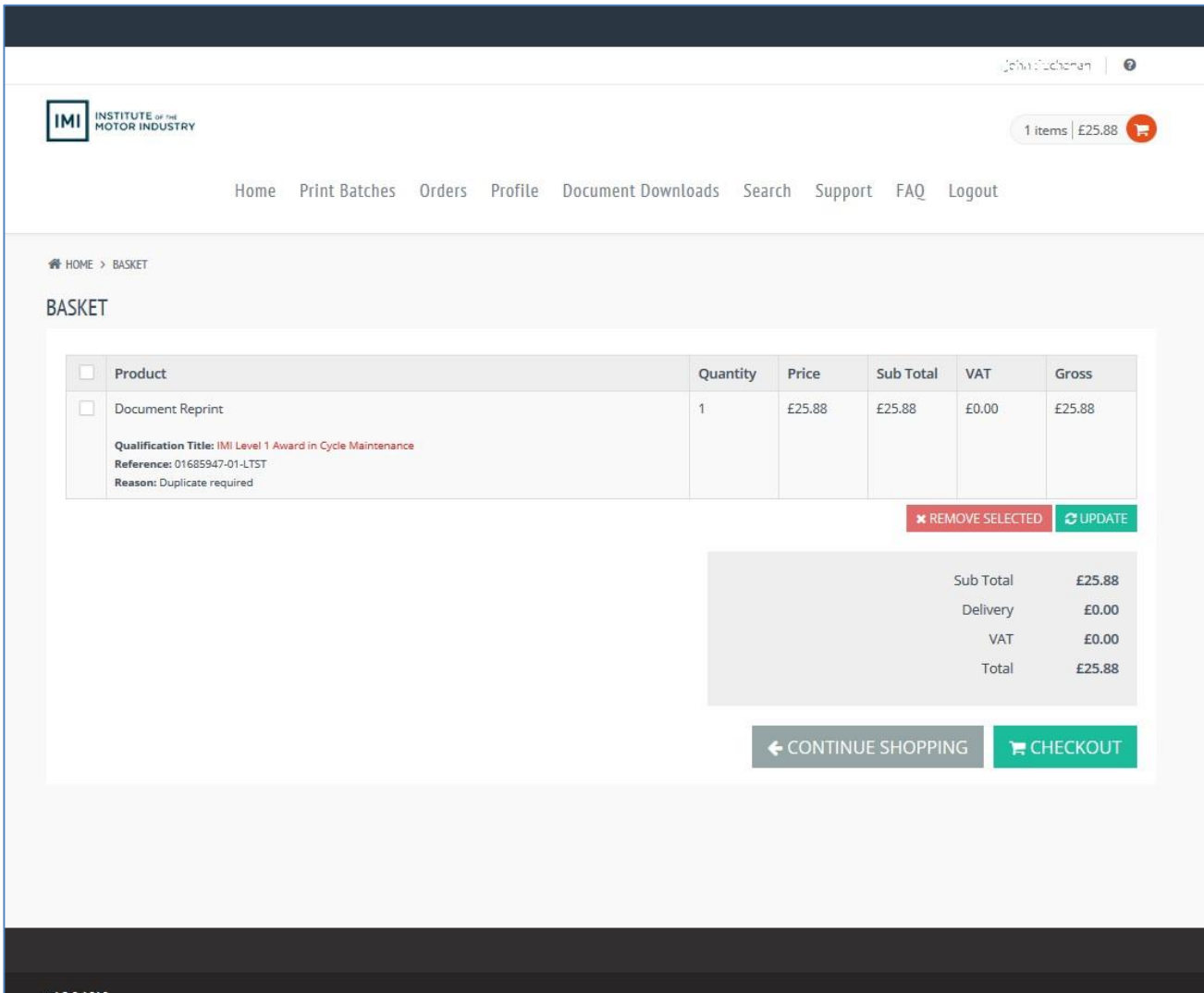


The Document Reprint area is displayed:



Centre users need to select the number of copies they require (please be aware that only 1 duplicate certificate or proof of qualification letter can be ordered per candidate per achievement) and the reason for the duplicate certificate before clicking Add to Cart.

The Centre user will then be taken to their Basket. Multiple duplicate certificates can be added to the basket before checking out. Once ready to checkout, users can click Checkout from their basket:



John Buchanan

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1 items | £25.88

Home Print Batches Orders Profile Document Downloads Search Support FAQ Logout

HOME > BASKET

BASKET

<input type="checkbox"/>	Product	Quantity	Price	Sub Total	VAT	Gross
<input type="checkbox"/>	Document Reprint <small>Qualification Title: IMI Level 1 Award in Cycle Maintenance Reference: 01685947-01-LTST Reason: Duplicate required</small>	1	£25.88	£25.88	£0.00	£25.88

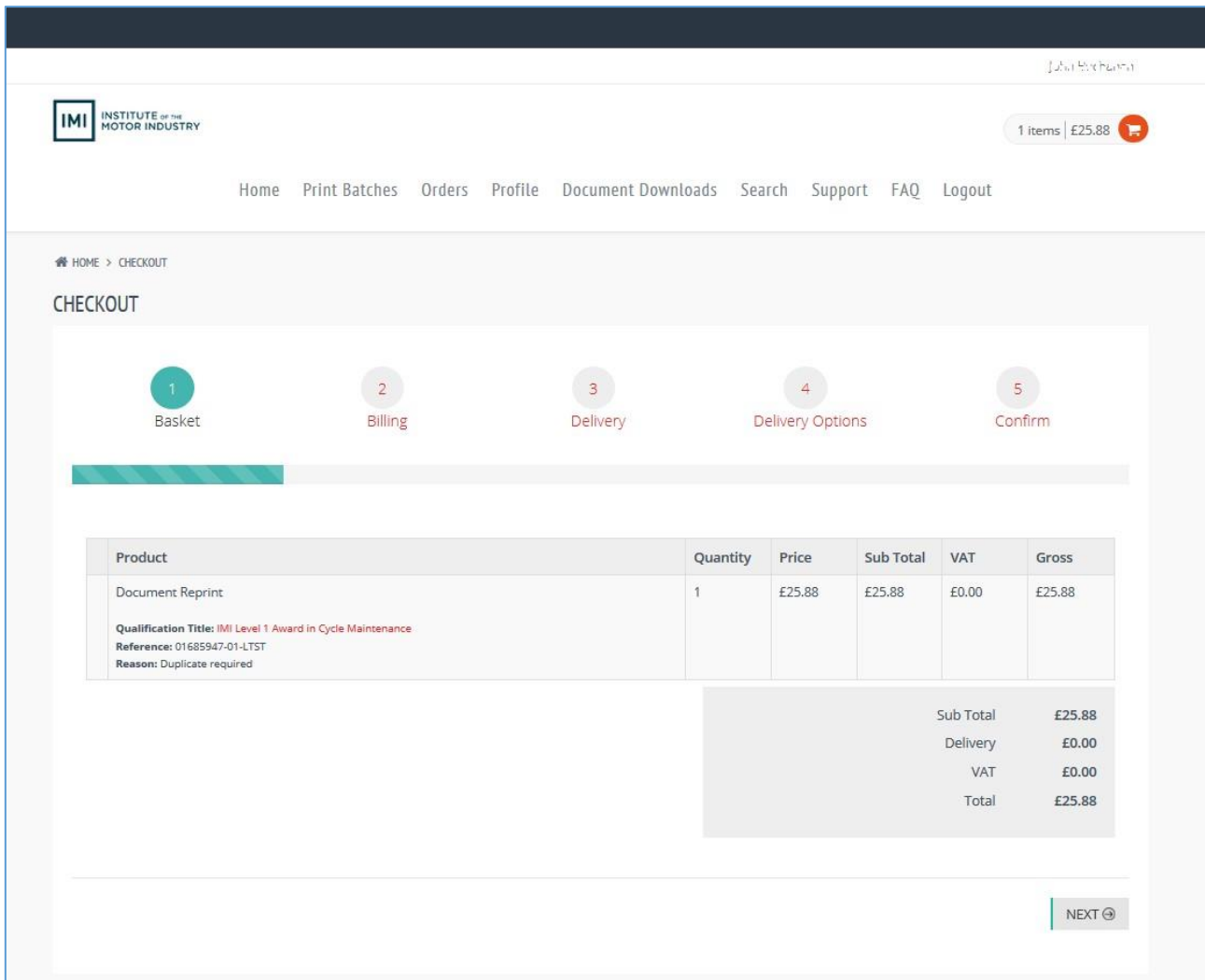
REMOVE SELECTED UPDATE

Sub Total	£25.88
Delivery	£0.00
VAT	£0.00
Total	£25.88

CONTINUE SHOPPING CHECKOUT

v4.2.0.1616

The order process consists of 5 sections:



The screenshot shows the IMI checkout page. At the top, there is a navigation menu with links: Home, Print Batches, Orders, Profile, Document Downloads, Search, Support, FAQ, and Logout. A shopping cart icon indicates 1 item for £25.88. The main heading is 'CHECKOUT' with a breadcrumb 'HOME > CHECKOUT'. Below this is a progress bar with five steps: 1. Basket (active), 2. Billing, 3. Delivery, 4. Delivery Options, and 5. Confirm. A table lists the product details:

Product	Quantity	Price	Sub Total	VAT	Gross
Document Reprint	1	£25.88	£25.88	£0.00	£25.88
Qualification Title: IMI Level 1 Award in Cycle Maintenance Reference: 01685947-01-LTST Reason: Duplicate required					

Summary table:

Sub Total	£25.88
Delivery	£0.00
VAT	£0.00
Total	£25.88

A 'NEXT' button is visible at the bottom right of the checkout area.

- **Basket** – this allows users to confirm what they are ordering
- **Billing** – this allows users to insert the billing address:
 - If the user is going to use Centre Credits for the order, this section is simply to allow the system to process the order. The main billing address that we have for the Centre will be used regardless of what is inserted here
 - If the user is going to use SagePay, this needs to match the billing address of the debit/credit card and is where the invoice will be sent
- **Delivery** – this allows users to insert the delivery address:
 - If the Centre user is going to use Centre Credits for the order, this section is simply to allow the system to process the order. The main certificate delivery address that we hold for the Centre will be used regardless of what is inserted here
 - If the Centre user is going to use SagePay, this address will be used as the delivery address

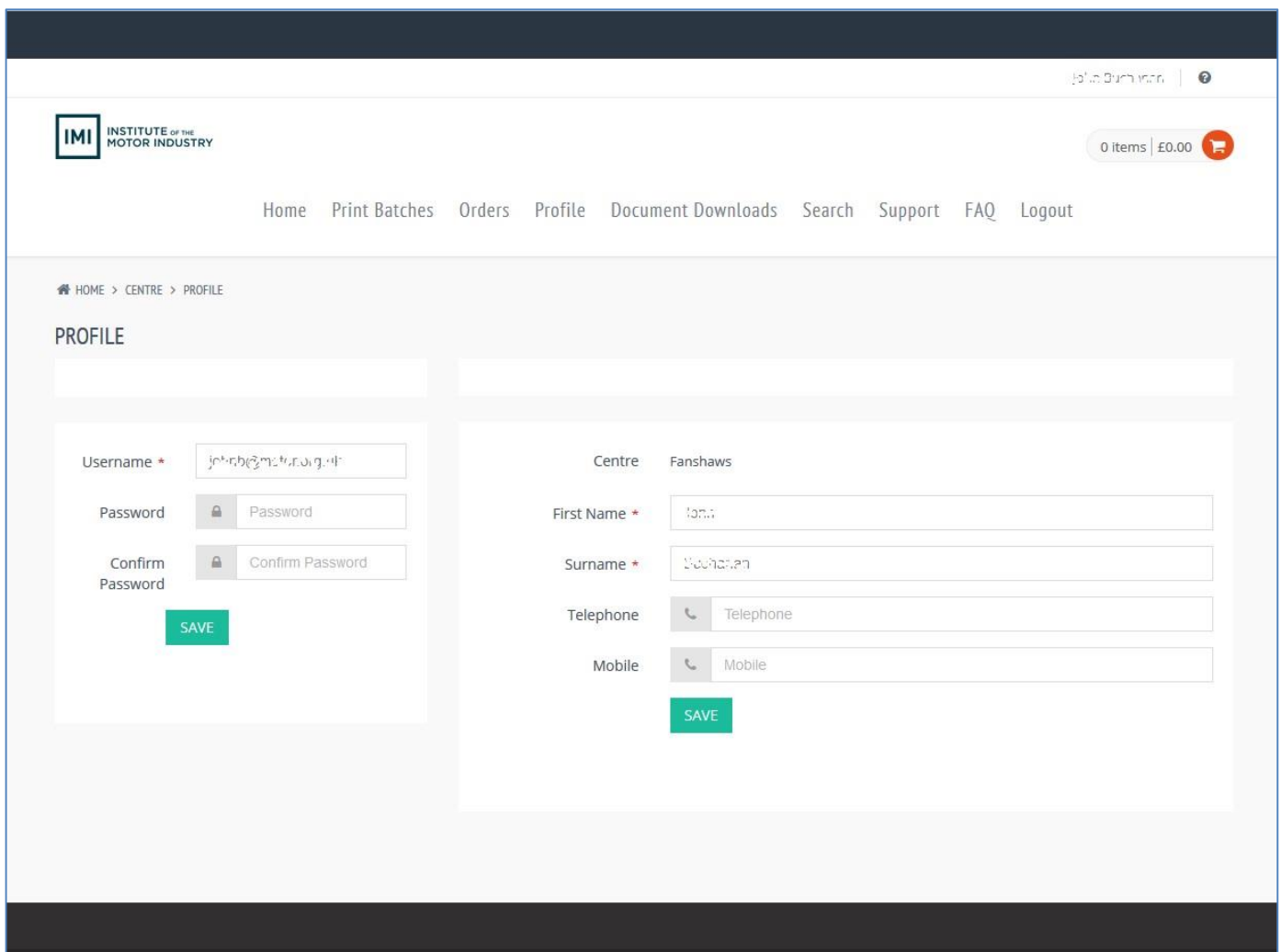
- Delivery Options – this allows users to select either:
 - Royal Mail signed for 2nd Class – there is no charge for this option
 - Royal Mail signed for 1st Class – this will be charged at £3.50

Please be aware that all international deliveries will show as no charge on this system. A member of the team will make contact to work out the delivery charge and to arrange for payment

- Confirm – this allows users to select the payment method (Centre credits or SagePay) and to confirm all details before the order is placed

PROFILE

Each Centre user will have a profile:



The screenshot shows the IMI user profile page. At the top, there is a navigation menu with options: Home, Print Batches, Orders, Profile, Document Downloads, Search, Support, FAQ, and Logout. The 'Profile' option is selected. Below the navigation, the page title is 'PROFILE'. The profile form is divided into two main sections. The left section is for user credentials, with fields for Username (containing 'johnd@motorindustry.co.uk'), Password, and Confirm Password, and a green 'SAVE' button. The right section is for personal details, with a 'Centre' dropdown set to 'Fanshaws', and input fields for First Name (John), Surname (Duchon), Telephone, and Mobile, also with a green 'SAVE' button.

Username, password and name details can be managed via this area.



SUPPORT AND FAQ

The support area provides users with contact information and the FAQ section provides a list of common questions and answers.

Effective Date:	22 June 2021	Doc. Owner:	Centre Services Manager	Master Proc.	N/A	Issue:	2
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