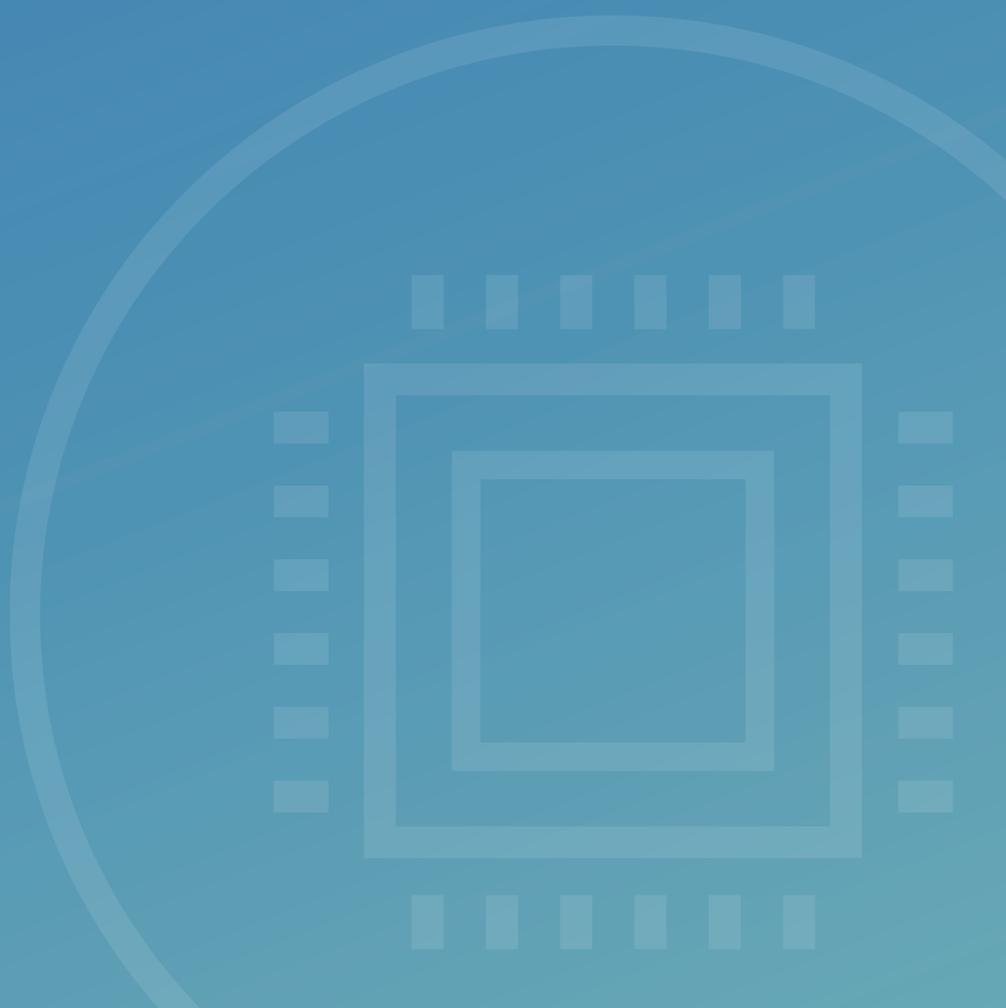


Registering & Certifying Learners OPITO Standards

May 2023



Amendments	
Reference no.	Rev no./date
Original	V1 April 2023
Version 2	V2 16 May 2023

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1.0 Glossary of Terms

Product	An OPITO Product is defined as OPITO Industry Standards, OPITO Global Qualifications, Competence Management System (CMS) accreditation or any other OPITO programme requiring OPITO Approval.
OPITO Standard	An OPITO Industry Standard is defined as being a programme of learning that defines the knowledge and/or practical outcomes which successful learners need to achieve to be certificated. There are three OPITO Standard types: Training Standard, Competence Standard and Workplace Competence Assessment Standard.
Unit/Component	Within the Products there are Units (also known as Components) which must be achieved to successfully achieve each Product.
Booking Form	Each learner is enrolled onto a Booking Form within The HUB. This form is where all of the information on their status of completion is stored.
Section	The Booking Forms consist of sections which host learner details, inclusive of achievement status's, certificates, forward dating requirements and unique booking reference information.
Centre	An OPITO approved organisation, or an organisation engaged in the OPITO Approval Process.
Learner	For the purpose of this document and in relation to Approvals held for any OPITO Products, those carrying out the training and/or assessment are referred to as learners.
API – Application Programming Interface	A software intermediary which creates communication between two applications to allow them to share information through the use of sending requests and responses.
Sanction	For the purpose of this document a sanction refers to the inability to register and/or certify learners against a particular Product due to an inactive Approval. This includes instances where a Centre is currently in the application and desktop stage(s) of the approval process.
OPITO Learner Number	Every learner who has successfully completed an OPITO certification and/or qualification is issued with a unique OPITO learner number. This number allows all records of their competence to be tracked in one place, alongside the relevant certifications and qualifications.
Vantage ID	A Vantage ID is assigned to any learners who are certified against an OPITO Approved Standard. When these learners are registered with OPITO the information is shared with Vantage and a unique Vantage ID created. Vantage refers to the shared system in which oil and gas operators can track personnel and their certifications.

Forward Dating	All OPITO Standards which are subject to expiry have the potential to be forward dated, upon completion and confirmation of competence of refresher training. Forward dating allows the validity of certification to be extended on completion of refresher training.
Back Dating	Back dating refers to instances when refresher training is carried out following expiry of an applicable certificate. This is to only be carried out when a learner has received a successful response to a request for dispensation, as per the OEUK guidelines.
NYC – Not Yet Competent	NYC reflects the competence status of a learner who has not successfully achieved a Unit or Units, and therefore has not been deemed competent against the Product in which they were assessed.

2.0 Introduction

The aim of this document is to explain each of the options available to Centres to register and certify (where appropriate) with OPITO. There are three fundamental methods: upload of competent learners within a CSV file; use of The HUB's booking system; or through the set up of an API. This document will discuss each of these options.

3.0 CSV File Upload Method

Following confirmation of competent learners against a particular Product information can be uploaded into The HUB via a CSV file. Upload of this file will act as notification that the learners have successfully achieved all of the required outcomes and Units for the applicable Product. It is therefore important that only learners deemed as competent against the entire Product are included and uploaded.

3.1 COMPLETING THE CSV FILE

A template CSV file can be found within the Document Library in The HUB. Image 1 is provided as an example. An individual CSV file should be uploaded for each cohort, or class, of learners. Each of the fields for completion are outlined within the following sections.

	A	B	C	D	E	F	G
1	Start Date	End Date	Centre Code	Product Code	Booking Ref No		
2	08-Aug-22	09-Aug-22			7542 OPITO105		
3							
4	Learner Count	OPITO Learner No	Vantage ID	First Name	Last Name	DOB	Forward Date
5	1	L084562	9864657	Sinead	McLeod	08-May-91	
6	2			Mohamed	Ibrahim	13-Oct-72	09-Sep-22
7	3		67485471	Gordon	Nile	06-Feb-81	25-Jul-22
8	4	L0674923		Sherif	O'Neil	19-Dec-74	
9							

Image 1 – Example of completed CSV

3.1.1 Start Date and End Date

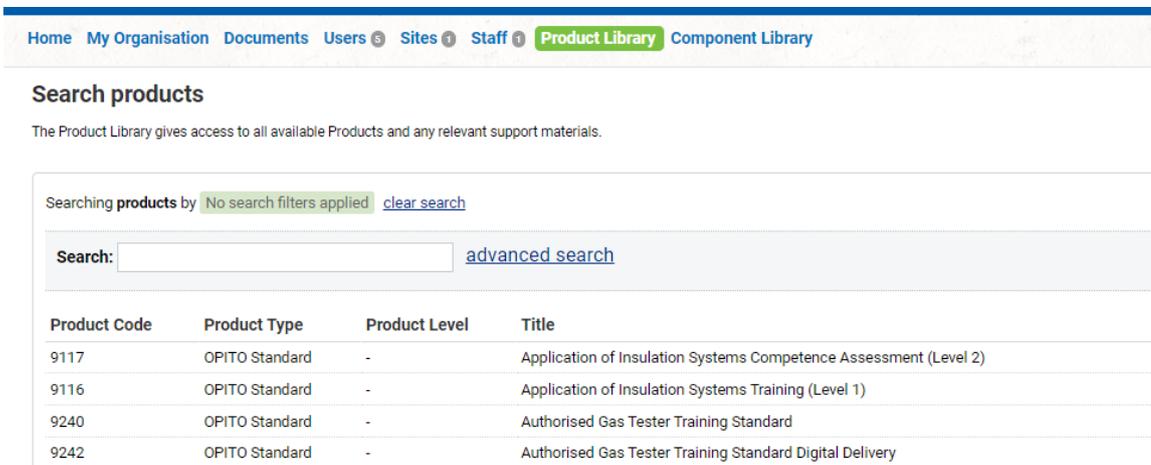
The start and end date fields are to be completed with the date the course commenced (start date) and the date the course was completed (end date). This information is then used by the system to generate an award date and an expiry date, where applicable. For example, for a BOSIET CA-EBS course with an end date of 15-SEP-2022, a certificate will be generated with an expiry date of 14-SEP-2026. Similarly, the award date would reflect the date of 15-SEP 2022.

It should also be noted that the date format must reflect that detailed in Image 1: DD-MON-YY e.g. 08-FEB-2022.

3.1.2 Centre Code, Product Code and Booking Ref Number

The 'Centre Code' field can be left blank when uploading files through a Centre login, as the system will automatically use the Centre Code allocated to the login. An organisation's Centre Code is allocated upon confirmation of achieving Initial OPITO Approval. This code can be found within The HUB, in the 'My Organisation' tab, listed under 'Centre Details.'

The 'Product Code' field should be populated within the unique code for the Product against which the learner has been deemed competent. The Product Code can be found within the Product Library as shown in Image 2.



The screenshot shows the 'Product Library' section of a web application. At the top, there is a navigation bar with links: Home, My Organisation, Documents, Users (5), Sites (1), Staff (1), Product Library (highlighted), and Component Library. Below the navigation bar, the heading 'Search products' is displayed. A sub-heading states: 'The Product Library gives access to all available Products and any relevant support materials.' Below this, there is a search interface with the text 'Searching products by No search filters applied' and a 'clear search' link. A search input field is present with the label 'Search:' and an 'advanced search' link. Below the search bar is a table with the following data:

Product Code	Product Type	Product Level	Title
9117	OPITO Standard	-	Application of Insulation Systems Competence Assessment (Level 2)
9116	OPITO Standard	-	Application of Insulation Systems Training (Level 1)
9240	OPITO Standard	-	Authorised Gas Tester Training Standard
9242	OPITO Standard	-	Authorised Gas Tester Training Standard Digital Delivery

Image 2 – Product Code location in Product Library

Additionally, the Product Code can be found within the relevant Product Specification. Instructions on how to download Product Specifications can be found within the Document Library in the video 'Navigating Product and Unit Templates.'

The Booking Reference Number will always be OPITO105. This is a system reference number specific to the registration of learners on to OPITO Standards. Differing reference numbers are available for Global Qualifications and Open Learning registrations. When downloading the template CSV file from the Document Library, this field will be pre-populated with the relevant Standard reference number.

3.1.3 Learner Count, OPITO Learner Number and Vantage ID

The learner count column simply tracks the number of learners on the course/booking. For this reason, this will never be higher than the maximum number of learners detailed in the Product Specification, unless otherwise agreed with OPITO.

If a learner has previously completed any OPITO certification or qualification (inclusive of Open Learning and apprenticeships) they will already have been assigned a unique OPITO learner number. Learner numbers can be found on all certificates issued after the launch of The HUB's 'Registration and Certification' module, allowing learners in receipt of those certificates to provide the learner number when completing the OPITO Learner Registration Form.

There will however be instances, especially initially, where learners have identified that they have previously achieved an OPITO Approved certificate or qualification, however, are unaware of their OPITO learner number. In these circumstances, the Centre should carry out a search for the learner(s) within The HUB to identify the OPITO learner number as follows:

1. When navigating to the 'Learners' tab within The HUB, the user will be taken to the 'Search Learners' criteria.
2. Within this area, the user can enter the learner's first name, surname and date of birth (reflective of that provided on their government issued ID). If a Vantage ID has been provided, this can also be used to increase the likelihood of locating the correct learner.

- Any existing learner records which are a potential match can be identified by clicking the ‘Search Learners’ button. Where a matching learner record is identified, the existing OPITO learner number will be displayed and can be entered into the CSV file for upload. An example is shown in Image 3.

Image 3 – search criteria to identify existing OPITO learner numbers

This process can also be followed to find existing records for learners who are unaware of their Vantage ID.

Clicking on the records for existing learners allows users to check previous achievements to ensure that they are a match for the learner whose OPITO learner number or Vantage ID is being checked, as shown in Image 4.

Image 4 – viewing a learner’s previous achievements

3.1.4 First Name, Surname and Date of Birth

These fields are self-explanatory, however it is important to note that the information included within the CSV file must be a direct reflection of the learner’s government issued ID. This is important in maintaining data integrity and ensuring that duplicate records are not created for learners who may have variations of their first name.

3.1.5 Forward Dating and Back Dating

This final column is where any potential forward date for the certificate expiry date should be detailed. In instances where a learner is deemed competent on any OPITO Standard Product within the three months prior to their current certificate’s expiry date, the new certificate expiry date should be calculated from the current expiry date. This provides flexibility around refresher training and avoids any time being lost on existing certification. Certificate expiry dates are auto calculated by The HUB, using the course end date, unless this is manipulated by the forward date field. To do this, calculate a new course end date based on the expiry date of the previous certificate, and enter this in the ‘Forward Date’ column. More information on this can be viewed in Table 1.

This column should also be used in instances where back dating is required. Courses should only be back dated when a valid successful request for dispensation can be presented. For more information on dispensation please visit the Offshore Energies UK website at <https://oeuk.org.uk/>. For reference, the principles of forward and back dating are outlined in Figure 1.



Figure 1 – Principles of forward and back dating.

Table 1 provides example scenarios of how to calculate forward dates, based on the current certificate expiry dates.

Forward Dating Scenarios [based on a current expiry date of 1st October 2022]	New Date Entered in The HUB	New Certificate Expiry Date
A learner has a BOSIET CA-EBS certificate. They complete the FOET with CA-EBS course on 12th September 2022.	1st October 2022 [Reflective of the date on the existing certificate].	30th September 2026
A learner has a Basic H2S certificate. The learner returns and completes the Basic H2S Training course again on 12th November 2022.	12th November 2022 [End date of the course, as this is the initial course].	11th November 2024
A learner has an OERTM-F and returns to complete another OERTM-F on 15th June 2022.	The learner can complete the OERTM-F however the certificate cannot be forward dated, as this is greater than 3 months from the current expiry date.	14th June 2024
A learner has a BOSIET EBS certificate. They return and complete the BOSIET EBS course again on 16th August 2022.	1st October 2022 [Reflective of the date on the existing certificate].	30th September 2026

Table 1 – Forward Dating Scenarios

Table 2 provides example scenarios of how to calculate back dates, based on the current certificate expiry date and availability of a valid and successful request for dispensation.

Back Dating Scenarios [based on a current expiry date of 1st October 2022]	New Date Entered in The HUB	New Certificate Expiry Date
A learner has a BOSIET CA-EBS certificate. They wish to complete a FOET CA-EBS course, upon incorrectly receiving a request for dispensation on 12th November 2022.	BOSIET CA-EBS is to be completed again and certificate is not back dated. 12th November 2022.	11th November 2026
A learner has an 'Offshore Emergency Response Team Member Further' certificate and a valid successful request for dispensation from the OIM. They successfully complete the OERTM-F again on 12th December 2022.	1st October 2022.	30th September 2026
A learner has a 'Helideck Emergency Response Team Leader Further' certificate. They wish to complete the HERTL-F course again on 16th November 2022, however they cannot present a successful request for dispensation.	Certificate cannot be back dated and ability to resit the HERTL-F will be based on meeting the other available pre-requisites.	
A learner has a FOET CA-EBS certificate. They wish to complete a FOET CA-EBS course, upon receiving a request for dispensation on 12th January 2023.	This is outwith the 3-month window and the learner will be required to complete the BOSIET with CA-EBS again.	

Table 2 – Back Dating Scenarios

Table 3 provides examples for forward and back dating in various Not Yet Competent scenarios.

NYC Scenarios [based on a current expiry date of 1st October 2022]	What Rule is Applied
A learner has a BOSIET with CA-EBS and returns to complete a FOET with CA-EBS on 1st September 2022 (applicable for forward dating). They however are deemed NYC against the HUET unit and return and successfully achieve this on 15th September 2022.	Forward Dating, and the new end date would be 1st October 2022, as this remains within the three-month allowance window.
A learner has a FOET with CA-EBS and returns to complete another FOET with CA-EBS on 1st November 2022. They are deemed NYC against the HUET unit, however return to complete and successfully achieve this on 15th November 2022.	Back Dating, and only if the learner has a valid approved request for dispensation, the certificate can be back dated, as this is still within the three-month window.
A learner has a FOET with CA-EBS and returns to complete another FOET with CA-EBS on 20th January 2023. They are deemed NYC against the HUET unit, however return to complete and successfully achieve this on 3rd February 2023.	Back Dating, however regardless of the status of the request for dispensation this cannot be applied, as this is now out with the three month window. The BOSIET CA-EBS will need to be carried out again.

Table 3 – NYC Forward and Back Dating Scenarios

3.2 UPLOADING THE CSV FILE

Upon completion of the CSV file as outlined in section 3.1, the file should be uploaded to The HUB, using the 'Learners' tab. Once entering the 'Learners' area, a number of options appear. The option required for uploading the CSV is found under the 'More Learner Actions' dropdown, as shown in Image 5. Select the option 'Upload Learner Data.'

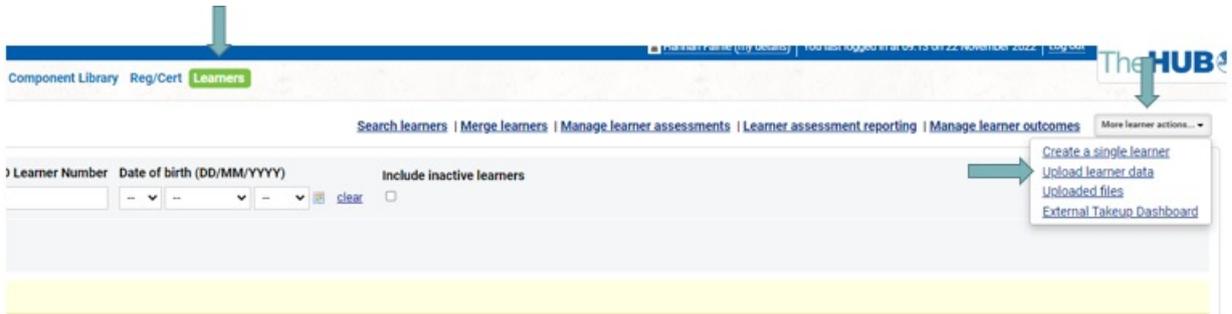


Image 5 –Using the 'Learner' tab to upload learner data

Once within the learner data upload area, the user is presented with the screen shown in Image 6. There are multiple data format options, however for the purpose of uploading competent learner data against OPITO Training and/or Assessment Standards, 'Opito Data' should be selected. The description text box is a free text field and whatever is used in here will act as the reference on screen for identifying the relevant booking form. Lastly, users should attach the CSV file and click the 'Upload Data File' button as shown in Image 6.

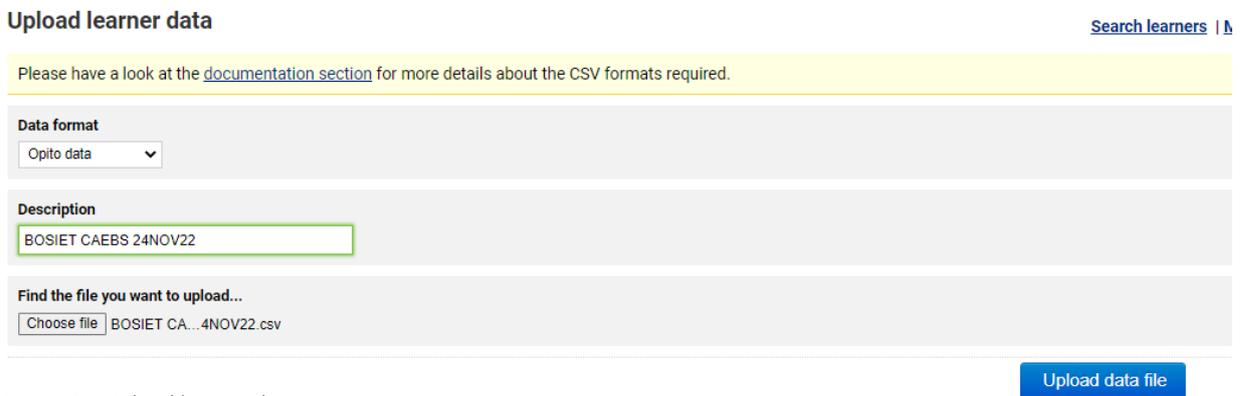


Image 6 – Upload learner data screen

Following a successful upload the screen will display as shown in Image 7. Please note that the successful message will not show instantly and will show as pending for a few minutes. The user may need to refresh the page to confirm the upload was successful.



Image 7 – Successful file upload

Once the file has been successfully uploaded, a booking is automatically created within The HUB. The form containing the uploaded information is hyperlinked under the heading 'Booking.' Clicking this hyperlink will take the user to the Booking Form and allow for the certificates to be downloaded and issued to the learners.

3.3 DOWNLOADING LEARNER CERTIFICATES

As mentioned in section 3.2, the autogenerated Booking Form can be accessed via the hyperlink next to the successful file upload. Any previously uploaded files (and autogenerated booking links) can be found within the 'Learners' area, by selecting 'Uploaded Files' from the 'More Learner Actions' dropdown, detailed in image 5 in section 3.2.

All booking forms can also be found within the 'Reg/Cert' tab. Upon clicking into the relevant Booking Form, the user will see two sections: 'Cohort Details' and 'Learner Details'. The certificates are downloaded from within the 'Learner Details' section, highlighted in Image 8.

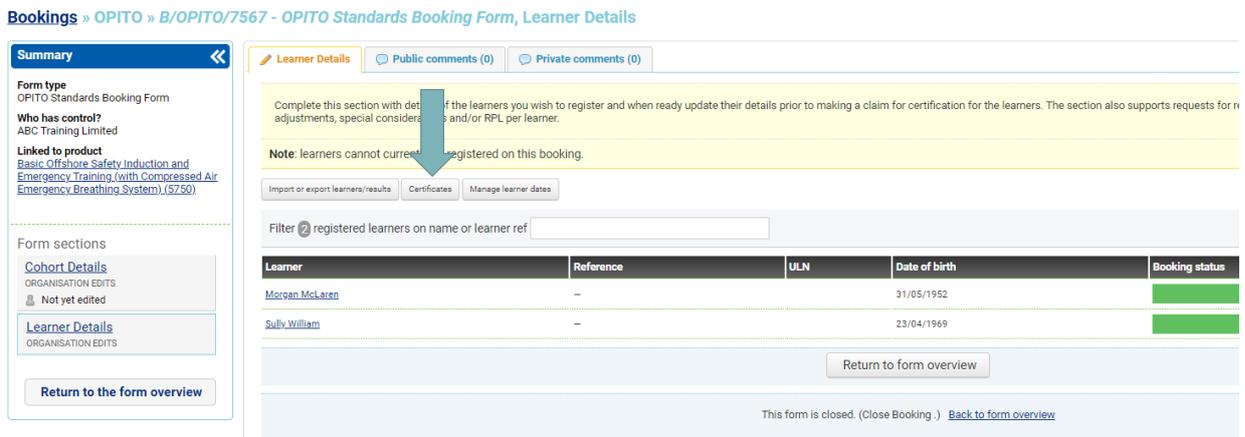


Image 8 – Access to learner certificates from the 'Learner Details' section

Within the certificates area of the form, users should select the e-certs PDF option from the dropdown menu. Certificates can then be downloaded for the full cohort of learners by using the 'Select All' option. If the user wishes to print only one certificate, then only the relevant learner should be selected. Clicking the 'Download Selected' button will download a zip folder containing certificates for the selected learner(s). Image 9 identifies the relevant dropdown, 'Select All' option and button to download certification(s).

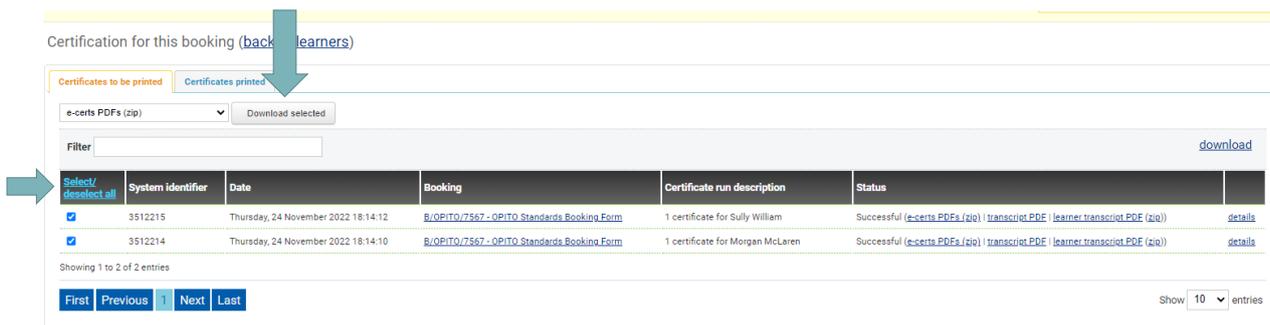


Image 9 – downloading certification

The certificates should then be issued to learners. Where the learner’s employer has requested that certification is issued to the employer, this should be issued in addition to the certificate issued directly to the learner.

3.4 ERRORS WITH FILE UPLOADS

If a file is uploaded and is rejected by The HUB, the relevant error message can be viewed. Failed uploads will be shown with red ‘Failed’ status message. The next column will contain a link to details of the specific error which has occurred as shown in Image 10.

Name	Date processed	Status	Result	
November 22 Error Example	28/11/2022 12:33:57	Failed	Errors on file processing. Download log file for more details.	file details
CAEBS 24NOV22	24/11/2022 18:14:00	Successful		file details

Image 10 – identifying errors in upload file

Clicking this link will open the file details page shown in Image 11. The log file is where the user can find the error within their file.

Home > My Organisation > Documents > Users > Sites > Staff > Profile

Uploaded file: Opito data ([back to upload results](#))

System ID #13456
Organisation N/A
Uploaded 28/11/2022 12:33:26 by Hannah Fairlie
File name November 22 Error Example.csv ([original file](#) | [log file](#))
Format OpitoData
Description November 22 Error Example
Status Failed - Errors on file processing. Download log file for more details.

Image 11 – error log file

There are a number of reasons why a file may fail to upload due to the content within the file. Table 4 outlines potential errors that can be found within the CSV file.

Error in Log File	Error in CSV Upload File
<p>Too Late: Provided date is later then allowed for a given field or with relation to a different date in the row (e.g. expiration date is earlier then date of issue). Please correct it.</p>	<p>This error message is in regard to the end date entered into the CSV file and may indicate one of two errors.</p> <p>The first is that the new end date which has been entered is more than three months away from the course end date.</p> <p>The second is that the CSV file has been uploaded too soon. As the upload of the CSV file acts as confirmation of competence for all included learners, it cannot be uploaded in advance of course completion, as it is not possible to confirm competence before this point.</p>
<p>Missing: Data specified as required is missing. Please fill in missing data.</p>	<p>This error message will display when a mandatory field has not been entered. Please refer to the previous sections of the document for information on mandatory fields.</p>
<p>Not Date Format: Format of the data is not a valid date. Please correct the format of the data.</p>	<p>If this error message is displayed it is likely that the date fields have been entered in the incorrect format. Dates should be entered as DD-MON-YY.</p>
<p>Too Long: Length of the data exceeds allowed number of characters. Please reduce number of characters.</p>	<p>This error message will display if greater than 35 characters are entered into any field. Please amend the relevant field to contain less than 35 characters.</p>
<p>Not Allowed Character Used: One of the characters used in the data is not allowed. Please check value and correct it</p>	<p>Certain characters cannot be included for example, within the forename and surname. Please detail the learner's name as per their government issued ID.</p>
<p>MFT not Found: MFT with the provided reference has not been found in the system. File processing has been stopped. Please correct MFT type or configure new MFT.</p>	<p>Section 3.1.2 outlines the requirements of the Booking Ref Number field. This should always be OPITO105. This error message will show if a different reference number has been entered or if the field has been left blank.</p>
<p>Learners Not Matching To Existing Records: Details for the learner with the internal reference provided do not match details of learner in creatiogreen with the same internal reference at AO. Please correct it.</p>	<p>Where an OPITO learner number has been entered, this error message may display in instances where the learner details held in The HUB against this number do not match those of the details entered in the upload file. Please ensure that the OPITO learner number and/or the learner details are correct.</p>
<p>Invalid Qualification Internal Reference: Product with the provided internal reference has not been found or is not live. Please check the data.</p>	<p>This error message is relating to the Product Code. If this error messages presents the Product Code which has been entered is not a valid OPITO Product Code.</p>
<p>Not With The Centre: Product has not been linked with the centre. Please make sure that qualification is offered by the centre.</p>	<p>The Centre uploading the learner data is not approved for the Product for which the code has been detailed. This could be due to the Product Code having been entered incorrectly.</p>
<p>Sanctioned: Internal Reference for product provided has a sanction applied for the organisation internal reference provided.</p>	<p>The Product Code included within the upload refers to a Product in which the Approval is currently suspended for the Centre.</p>
<p>Invalid Centre Internal Reference: Centre with the internal reference provided does not exist in the system. Please correct.</p>	<p>This error message suggests that the incorrect Centre Code has been detailed. Please refer to section 3.1.2 for more information on this.</p>
<p>Learner Internal Reference Not Found: Internal references must exist in the system. Remove them from the file if you want to create a new learner. System will generate a new reference for that learner.</p>	<p>This error will display where an OPITO learner number has been entered, however there is no matching record within The HUB. Please check that the correct OPITO learner number has been detailed.</p>

Table 4 – error logs from CSV uploads

4.0 Use of The HUB as a Booking System

The purpose of this section is to detail how to utilise The HUB as a booking system. This includes registration of learners onto the booking/course, input of competent and not yet competent outcomes and generation of certification.

4.1 CREATING THE BOOKING

4.1.1 The Booking Form

To begin registering learners onto a course for an OPITO Training and/or Assessment Standard, begin within the 'Reg/Cert' tab in The HUB. In here, on the right-hand side the user will see the option to create a booking. Following this, select the booking type of 'OPITO Standards Booking Form' and then when prompted select the relevant Product from the list and finally use the 'Create Booking' button. A Booking Form will then open as shown in Image 12.

Bookings » OPITO » B/OPITO/7621 - OPITO Standards Booking Form - Overview

Summary

Form type
OPITO Standards Booking Form

Who has control?
ABC Training Limited

Linked to product
Basic Offshore Safety Induction and Emergency Training (with Compressed Air Breathing System) (12750)

Form stages with status flags

Booking Open
ORGANISATION EDITS: Not updated ✓

Learners registered
OPITO EDITS: Not updated ✓

Booking Closed
OPITO EDITS: Not updated ✓

Booking withdrawn
OPITO EDITS: Not updated ✓

Form history

FORM CREATED at 01 December 2022 16:49:15
Hannah Fairlie, ABC Director, Senior Contact

About this form

Cohort Details
ORGANISATION EDITS: Not yet edited
✓ Start date 01/12/2022 (change start date)
✗ End date Not specified (change end date)
✓ Booking open for registrations
✓ Minimum age for registration: 18

Learner Details
ORGANISATION EDITS: Add/remove components Show product structure Show booking pie chart

Submit registrations Close Booking Withdraw the booking

[Print form](#) [export to CSV](#) [export to PDF](#)

User assignments

Assigner	Assignee	Reason	Date assigned	Deadline	Status	
Hannah Fairlie (Super User)	Hannah Fairlie (Super User)	For action	01 December 2022 16:49:16	--	open	details cancel

[Add a user assignment](#)

Image 12 – example booking form

The form should be completed with the details of the course. More detail on this can be found in section 4.1.2 of this document.

4.1.2 Inputting Course Details

On the form overview there is an option to change the start date and change the end date. These should be updated to reflect the actual dates on which the course will commence and be completed.

To identify the different courses easily from the 'Reg/Cert Bookings' page, the user should input detail as to which cohort the booking is in reference to, as shown in Image 13. This could for example, detail the dates in which the course is running and any unique identifier for the course e.g. A/B or C, where multiple of the same course are taking place on the same dates.

If the course is taking place as on-location training, the site can be selected from a dropdown menu.

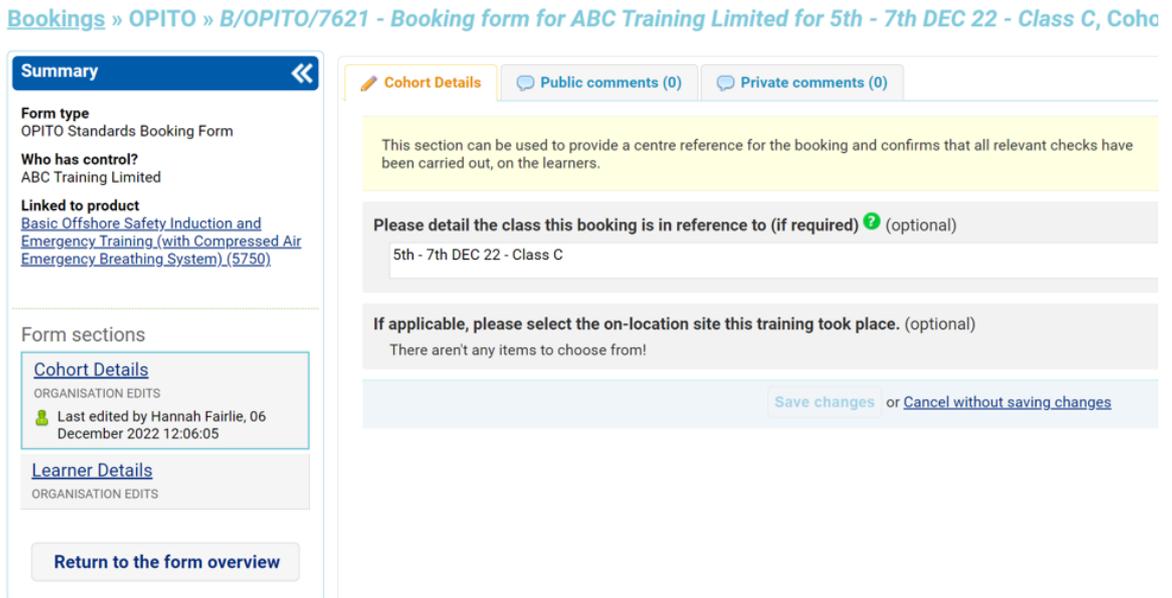


Image 13 – Cohort Details

Once the cohort details section of the form has been completed and saved, the form title will be updated and the 'Search Bookings' page which is shown when entering the 'Reg/Cert' area will be updated to reflect the specific course details, as shown in Image 14.

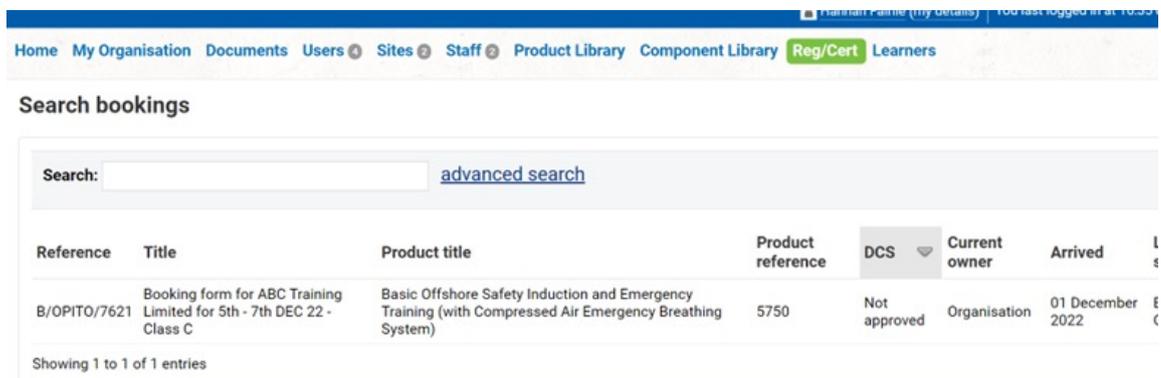


Image 14 – 'Search Bookings' page

4.2 REGISTERING LEARNERS

4.2.1 Learners Not Previously Registered at the Centre

When a learner enquires about booking on to an OPITO course, specific information is required to register them within The HUB. This information can be obtained by sending out the OPITO Learner Registration Form. The remainder of this will still need to be completed during the course induction. The Learner Registration Form can be found within The HUB in the Document Library.

Learners are registered onto the course within the 'Learner Details' section of the relevant Booking Form. Within this section there is the option to 'Add a New Learner' as shown in Image 15. Upon clicking this, users will see the screen shown in Image 16.

Bookings » OPITO » B/OPITO/7621 - Booking form for ABC Training Limited for 5th - 7th DEC 22 - Class

Summary <<

Form type
OPITO Standards Booking Form

Who has control?
ABC Training Limited

Linked to product
[Basic Offshore Safety Induction and Emergency Training \(with Compressed Air Emergency Breathing System\), \(5750\)](#)

Form sections

Cohort Details
ORGANISATION EDITS
Last edited by Hannah Fairlie, 06 December 2022 12:06:05

Learner Details
ORGANISATION EDITS

Return to the form overview

Learner Details Public comments (0) Private comments (0)

Add a new learner Add existing learners Import or export learners/results Certificates Manage learner dates

Filter 0 registered learners on name or learner ref

No learners have been added to this booking! - [add one now](#)

Return to form overview

Image 15 – Adding a learner

Bookings » OPITO » B/OPITO/7621 - Booking form for ABC Training Limited for 5th - 7th DEC 22 - Class C, L

Summary <<

Form type
OPITO Standards Booking Form

Who has control?
ABC Training Limited

Linked to product
[Basic Offshore Safety Induction and Emergency Training \(with Compressed Air Emergency Breathing System\), \(5750\)](#)

Form sections

Cohort Details
ORGANISATION EDITS
Last edited by Hannah Fairlie, 06 December 2022 12:06:05

Learner Details
ORGANISATION EDITS

Return to the form overview

Learner Details Public comments (0) Private comments (0)

Add a new learner to this booking ([cancel](#))

First name

Surname

Date of birth (DD/MM/YYYY)
-- -- --

Vantage ID (optional)

SCN (optional)

Create learner and add to booking [cancel](#)

Image 16 – Adding learner details

First name, surname and date of birth are mandatory fields and it is important that these match details shown on learners' government issued ID. Where a Vantage number is available, this can be entered also. Where a learner has identified that they have an existing Vantage ID, however are unaware of the number, this can be found by searching for the learner using the other details available. This process is outlined in section 3.1.3 of this document. After selecting 'Create Learner and Add to Booking' the page should show as below, in Image 17.

Bookings » OPITO » B/OPITO/7621 - Booking form for ABC Training Limited for 5th - 7th DEC 22 - Class C, Learner Details

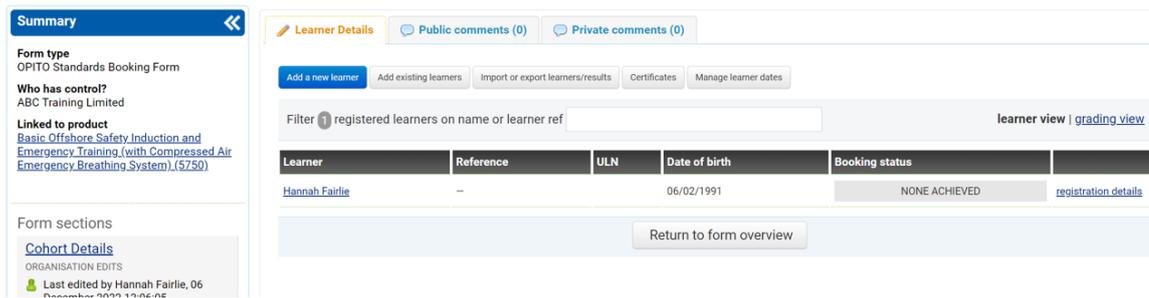


Image 17 – learners added on booking

Learners can be added in this method as and when they are enrolled on to the course.

4.2.2 Learners Previously Registered with Centre on OPITO Training

When a learner enquires about booking on to an OPITO course, specific information is required to register them within The HUB. This information can be obtained by sending out the OPITO Learner Registration Form. The remainder of this will still need to be completed during the course induction. The Learner Registration Form can be found within The HUB in the Document Library.

If the learner has identified that they have completed OPITO training with the Centre previously, then they can be added to the booking using the 'Add Existing Learners' option, which can be seen in Image 18. By searching the learner's information, the existing record can be attached to the booking by selecting the learner from the available option(s) and clicking 'Add These Learners.'

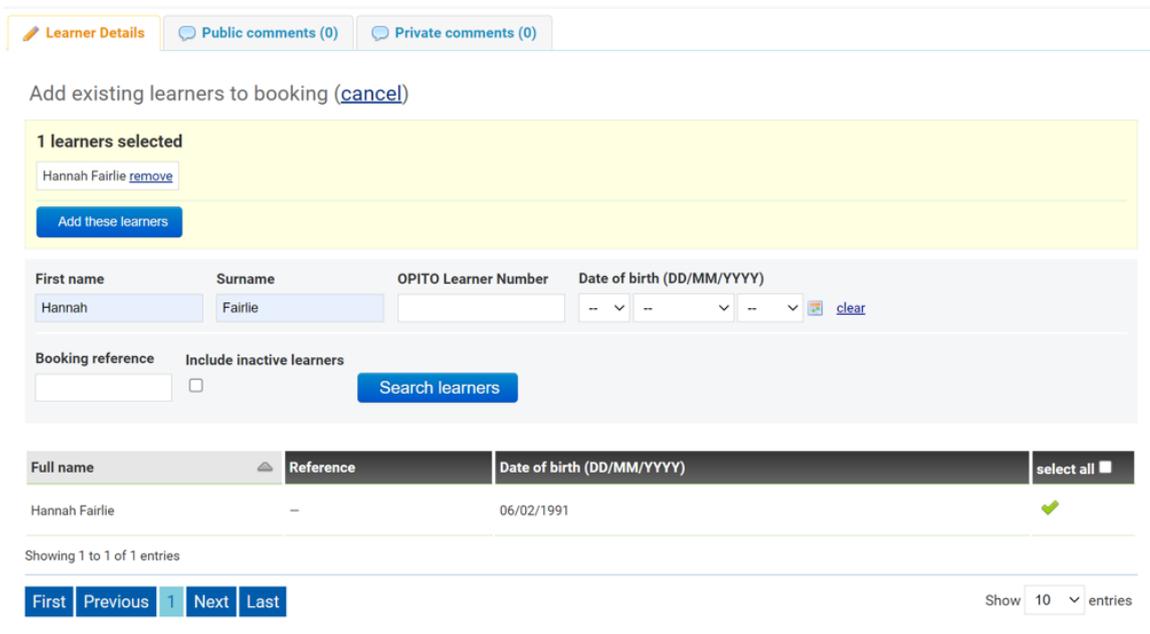


Image 18 – add existing learner

If information is entered using the 'Add New Learner' feature explained in section 4.2.1 which appears to match an already existing learner enrolled with the Centre, then this learner record will be displayed as a possible learner to use.

4.2.3 Forward and Back Dating

Following adding a learner, it is important to update any potential forward or back dating dates. For more information on the principles of forward and back dating, please see section 3.1.5.

The expiry dates are calculated from the course end date which was entered when the booking was created. Where this is to be overridden to apply forward/back dating, this is done within the 'Learner Details' section. By clicking on 'Manage Learner Details', the screen shown in Image 19 will be presented.

Manage learner dates for this booking ([back to learners](#)) Save Dates

Booking Start Date: 08/12/2022 ([apply to all](#))
 Booking End Date: Not set

Select/deselect learner(s) Select/deselect component(s)

Please select Please select

-- -- -- clear -- -- -- clear Set all...

Learner	Component	Start Date	End Date	AO Specified Value
---------	-----------	------------	----------	--------------------

[Cancel Changes](#) Save Dates

Image 19 – 'Manage Learner Dates' view

Records for the relevant learner(s) which are to receive a forward or back date should be selected from the 'Select/deselect Learner(s)' dropdown menu. Additionally, the Product should be selected from the 'Select/deselect Component(s)' dropdown.

Manage learner dates for this booking ([back to learners](#)) Save Dates

Booking Start Date: 08/12/2022 ([apply to all](#))
 Booking End Date: Not set

Select/deselect learner(s) Select/deselect component(s)

Please select Please select

William Gates Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System)

-- -- -- clear -- -- -- clear Set all...

Learner	Component	Start Date	End Date	AO Specified Value
William Gates	Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System)	08 December 2022 clear	11 January 2023 clear	Forward Dated

[Cancel Changes](#) Save Dates

Image 20 – Inputting the forward/back date

The date which is to override the course end date for the purpose of generating a course expiry date should be entered into the 'End Date' field. From the specified value dropdown 'Forward Dated' should be selected and then 'Save Dates.' Please see Image 20 above.

It is important that applicable forward or back dates are entered prior to awarding any Product or its Units. As certificates are automatically generated upon confirmation of award, the expiry date will be calculated using the course end date, where the forward/back date has not yet been entered.

4.2.4 Removing Learners from Booking

Where a learner has been added to a booking but will not be attending the course for any reason, they can be removed from the booking. Beside the learner name there is a hyperlink for 'Registration Details' which can be seen in Image 17 – learners added to booking. To remove a learner, click the hyperlink next to their name. This will open the page shown in Image 21.

Learner Details | **Public comments (0)** | **Private comments (0)**

Assessment for Phillippe McMartin ([back to learners](#))

Assessment | **Personal details** | **Bookings** | **Forms**

Filter assessments:

[change components](#) | [remove from booking](#)

! Marks/grades cannot be entered for this learner until you have submitted the booking form to lock/confirm the registrations.

	Results not entered	Not yet claimed	Not yet granted	Not yet certificated	Not placed on hold
P 5750 Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System) <small>PASS BASED ON STRUCTURE, INTERNALLY ASSESSED</small> Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System) Not Yet Achieved Achieved Other requests: W D Assessment not yet recorded		Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Cannot be awarded as not yet claimed Award <input type="checkbox"/>	Not yet eligible for certification E-certificate	Hold <input type="checkbox"/>
C OIS-01 Safety Induction <small>MANUAL, INTERNALLY ASSESSED</small> Safety Induction		Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Cannot be awarded as not yet claimed Award <input type="checkbox"/>	Paper certificate	Hold <input type="checkbox"/>

Image 21 – Removing a learner

From here, the learner can be removed by clicking 'remove from booking.'

4.3 COMPLETION OF COURSE ENROLMENT

Once the course has commenced, the Centre should confirm which learners are in attendance. This is done on the form overview by clicking ‘Submit Registrations’ at the bottom of the screen.

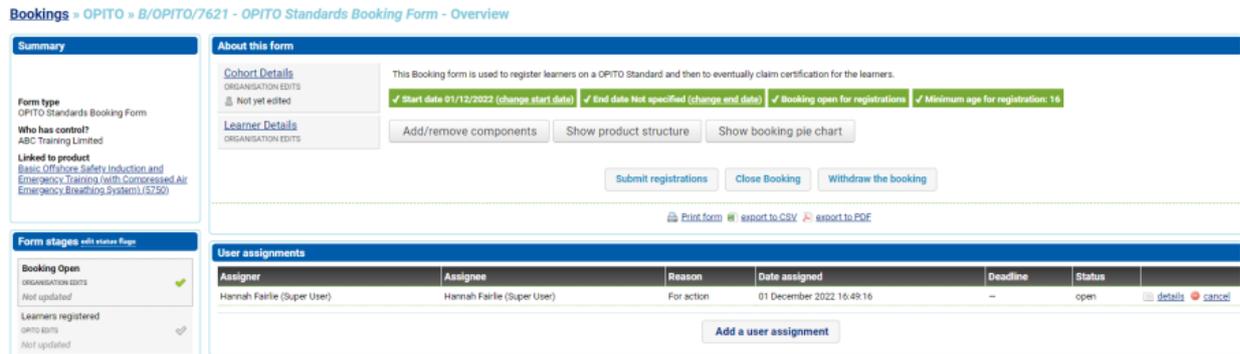


Image 22 – confirming learners in attendance

Following this, the booking will be locked and no new learners can be added or removed.

4.4 AWARDING PRODUCTS AND UNITS

Once the learners have been registered onto the course and following the course enrolment, the learners can be awarded for the applicable Products and Units.

If any learners are to have forward or back dating applied, these dates must be entered prior to awarding Products and Units.

Inputting competent and not yet competent outcomes is completed within the ‘Learner Details’ section of the form, by selecting ‘Grading View’, highlighted in Image 23.

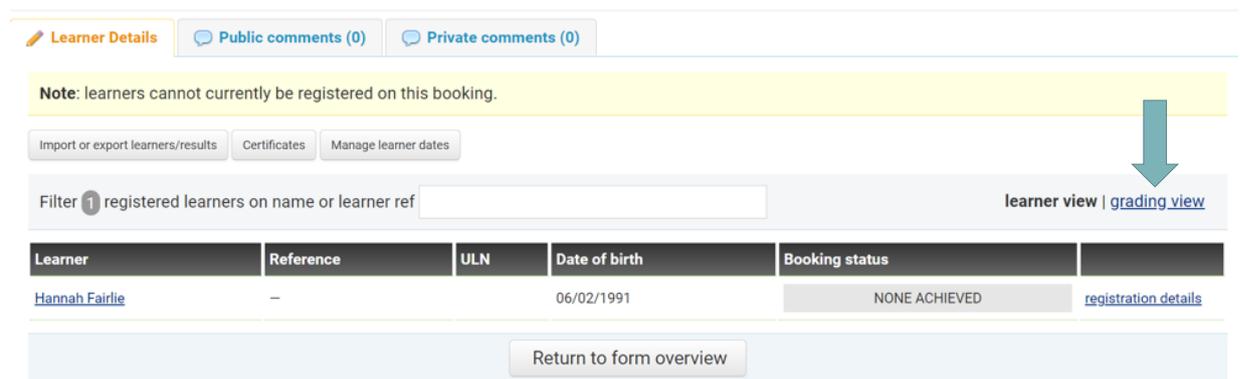


Image 23 – grading view

Upon entering the grading view area, the user can mark each of the Units as ‘Achieved’ or ‘Not Yet Achieved’ as applicable. Similarly, the option for ‘Apply Passing Grade to All’ can be used.

[Save changes](#) [apply passing grade to all](#) | [claim all](#) |

Hannah Fairlie DOB: 06/02/1991, REF: 639923, ULN:

	Results not entered	Not yet claimed	Not yet granted	Not yet certificated	Not placed on hold
P 5750 Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System) <small>PASS BASED ON STRUCTURE, INTERNALLY ASSESSED</small> Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System) Not Yet Achieved <input type="checkbox"/> Achieved <input checked="" type="checkbox"/> Other requests <input type="text"/> W D Assessment not yet recorded		Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Cannot be awarded as not yet claimed Award <input type="checkbox"/>	Not yet eligible for certification E-certificate	Hold <input type="checkbox"/>
C OIS-01 Safety Induction <small>MANUAL, INTERNALLY ASSESSED</small> Safety Induction Not Yet Achieved <input type="checkbox"/> Achieved <input checked="" type="checkbox"/> Other requests <input type="text"/> W D Assessment not yet recorded		Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Cannot be awarded as not yet claimed Award <input type="checkbox"/>	Paper certificate	Hold <input type="checkbox"/>
C OIS-78 Helicopter Safety and Escape CA-EBS <small>MANUAL, INTERNALLY ASSESSED</small> Helicopter Safety and Escape CA-EBS Not Yet Achieved <input type="checkbox"/> Achieved <input checked="" type="checkbox"/> Other requests <input type="text"/> W D Assessment not yet recorded		Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Cannot be awarded as not yet claimed Award <input type="checkbox"/>	E-certificate	Hold <input type="checkbox"/>
C OIS-03 Sea Survival and First Aid <small>MANUAL, INTERNALLY ASSESSED</small> Sea Survival and First Aid Not Yet Achieved <input type="checkbox"/> Achieved <input checked="" type="checkbox"/> Other requests <input type="text"/> W D Assessment not yet recorded		Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Cannot be awarded as not yet claimed Award <input type="checkbox"/>	E-certificate	Hold <input type="checkbox"/>

Image 24 – selecting grades

After selecting the relevant grading options, users should hit the ‘Save Changes’ button. This will then automatically certify all of the applicable learners, generate certification(s) and send the records down to Vantage. It is therefore important to ensure that all grades have been selected appropriately prior to saving at the specific Centre, as shown in Image 28.

4.5 DOWNLOAD AND ISSUE OF CERTIFICATES

To download the certificate(s), enter the ‘Learner Details’ section and select ‘Certificates.’ This will present the screen shown in Image 25.

[Learner Details](#) | [Public comments \(0\)](#) | [Private comments \(0\)](#)

Certification for this booking ([back to learners](#))

Certificates to be printed | **Certificates printed**

e-certs PDFs (zip)

Filter [download](#)

Select/deselect all	System Identifier	Date	Booking	Certificate run description	Status
<input checked="" type="checkbox"/>	3512346	Friday, 09 December 2022 17:22:12	B/OPITO/7635 - OPITO Standards Booking Form	1 certificate for Hannah Fairlie	Successful (e-certs PDFs (zip) transcript PDF learner transcript PDF details (zip))

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#) Show entries

Image 25 – generating certification(s)

Within the 'Certificates to be Printed' area, select 'e-certs PDF zip' from the dropdown menu. To download certificates for all learners in the class, click the 'Select All' option and then 'Download Selected'. All certificates will be downloaded into a zip folder for issue to the learners as appropriate.

Once all learners have been awarded and certificates downloaded and issued, use the 'Close Booking' button in the form overview shown in Image 26.

Image 26 – Close booking

4.6 NOT YET COMPETENT – RETURN TO COMPLETE

If a learner who was deemed not yet competent against a Unit in a Product which allows for the three month return to complete window returns to be re-assessed against the relevant Unit, a new Booking Form should be created and completed, as per the instructions outlined in section 4.1. The start date should be updated to reflect the date in which the original course commenced, and the end date should reflect that of the date they are due to complete the NYC Unit.

The process for adding an existing learner should be followed as outlined in 4.2.2. When entering the grading window, the already achieved Units will show as previously awarded and the outstanding Unit will be available to update, as shown in Image 27.

Hannah Fairlie DOB: 06/02/1991, REF: 639923, ULN:

P 5750 Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System) <small>PASS BASED ON STRUCTURE, INTERNALLY ASSESSED</small> Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System) Not Yet Achieved Achieved Other requests W D Assessment not yet recorded	Results not entered	Not yet claimed Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Not yet granted Cannot be awarded as not yet claimed Award <input type="checkbox"/>	Not yet certificated Not yet eligible for certification E-certificate
	C OIS-01 Safety Induction Component previously awarded Mark: N/A, Grade: Achieved Achieved: 09/12/2022, claimed: 09/12/2022, awarded: 09/12/2022 Assessments <ul style="list-style-type: none"> Safety Induction: mark: not required, grade: Achieved 			
C OIS-78 Helicopter Safety and Escape CA-EBS <small>MANUAL, INTERNALLY ASSESSED</small> Helicopter Safety and Escape CA-EBS Not Yet Achieved Achieved Other requests W D Assessment not yet recorded	Results not entered	Not yet claimed Cannot be claimed as not yet achieved Claim <input type="checkbox"/>	Not yet granted Cannot be awarded as not yet claimed Award <input type="checkbox"/>	Not yet certificated E-certificate
	C OIS-03 Sea Survival and First Aid Component previously awarded Mark: N/A, Grade: Achieved Achieved: 09/12/2022, claimed: 09/12/2022, awarded: 09/12/2022 Assessments <ul style="list-style-type: none"> Sea Survival and First Aid: mark: not required, grade: Achieved 			

Image 27 – Back to complete outcomes

Save the changes and then, if applicable, the certification will be generated. Once all learners have been awarded and certificates downloaded and issued, use the 'Close Booking' button in the form overview as detailed in section 4.5.

4.7 RE-PRINTING A CERTIFICATE

If a learner's certificate is required to be downloaded again, for example, if it has become lost, the certificate can be downloaded by searching for the learner as detailed in section 3.1.3 of this document. Once the learner has been found, the relevant Booking Form can be located within the 'Bookings' tab on their record. This will only be available to view for bookings created at the specific Centre, as shown in Image 28.

View learner: Phillippe McMartin [Search learners](#) | [Merge learners](#) | [Manage learner assessments](#) | [Learner assessment reporting](#) | [Manage learner outcomes](#) [More learner actions...](#)

Personal details	Learner at my organisation	Learner at my AOs	Bookings	Form history	Achievements					
Booking reference	Booking	Product title	Product reference	DCS	Date created	Total components	Achieved	Claimed	Awarded	Certificated
B/OPITO/7630	Booking form for ABC Training Limited for BOSIET CAEBS 6th - 8th DEC 22 Class A	Basic Offshore Safety Induction and Emergency Training (with Compressed Air Emergency Breathing System)	5750	unclaimed	09/12/2022 21:37:11	5	6	5	5	1

Image 28 – Locating a closed booking

Clicking the hyperlink to the relevant booking will open the closed form and the certificate can be downloaded again, within the '*Learner Details*' section.

If a new certificate is required and re-generated, for example due to an error in the learner's name, please contact OPITO to have these amendments made.

5.0 Setting Up an API

The final method of uploading competent learner data to The HUB is through the set up of an API from your internal booking system to The HUB. By aligning the relevant data fields from the internal booking system to those required within The HUB, the data can be populated automatically. This also allows the certificates to be generated within The HUB and sent down to the internal booking system for issue.

For more information on setting up an API, please contact OPITO directly.

The **HUB** 

www.opito.com