



IPAF TCAS User Guide

19/11/2021

www.ipaf-training.com



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1. Log in Screen

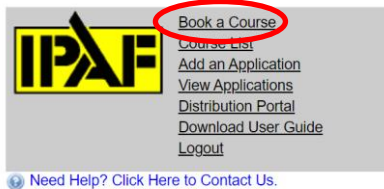
To log in to the system you need to go to www.ipaf-training.com

Enter the email address or phone number that was used to set your account up.

If you need assistance with your log in email training@ipaf.org or call your local IPAF office www.ipaf.org/contact

A screenshot of the IPAF login interface. At the top, there is a black header bar with the IPAF logo on the left and a 'SIGN UP' link on the right. Below the header is a yellow banner with the text 'LOG IN' in black. The main content area is white and contains a login form. The form has a title 'CHOOSE HOW TO LOG IN' with a small black square icon to its left. Below the title are two input fields: 'EMAIL OR MOBILE' and 'PASSWORD'. The 'EMAIL OR MOBILE' field has a placeholder text 'Email or Mobile'. The 'PASSWORD' field has a placeholder text 'Password'. Below the input fields is a link 'Forgot my password?'. At the bottom of the form is a checkbox labeled 'Remember my login'. At the very bottom of the form are two buttons: a yellow 'LOG IN' button and a grey 'CANCEL' button.

2. Book a course




Please choose from one of the following:



On the home screen, select 'Book a Course' and you will then see the booking form.

Next, complete the course booking form. Please fill in all the requested information correctly in the red fields. In the box "Grade" you can choose whether to submit an operator or a demonstrator course. Estimate the total applicants and enter, where applicable the total renewals, upgrades or eLearning candidates. You then need to select the categories that are going to be covered in this course.



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Course Booking for IPAF Approved Licences

Notes:

All fields in red must be completed

Course Details

Training Centre: IPAF Testing

Grade: OPERATOR

Start Date (dd/mm/yyyy) and Start Time (hh:mm): 22-Apr-2021 hh : mm

Length Of Course (Days): 1

End Date (dd/mm/yyyy): 22-Apr-2021

Total Applicants: 0

Total Renewals: 0

Total Upgrades: 0

Total e-Learning: 0

Course Notes:

Machine Categories (Check the boxes that the Applicant will be trained to operate)

<input type="checkbox"/> Static Vertical - (1a)	<input type="checkbox"/> Static Boom - (1b)
<input type="checkbox"/> Special - (SPECIAL)	<input type="checkbox"/> Mobile Vertical - (3a)
<input type="checkbox"/> Loading And Unloading - (LOAD)	<input type="checkbox"/> Mobile Boom - (3b)
<input type="checkbox"/> Harness - (H)	<input type="checkbox"/> Insulated Aerial Device - (IAD)
<input type="checkbox"/> Mewps For Managers - (MM)	<input type="checkbox"/> Push Around Vertical - (PAV)
<input type="checkbox"/> Mast Climbing Work Platforms - (MCWP)	<input type="checkbox"/> Pre-Delivery Inspection - (INSP)
<input type="checkbox"/> Mobile Mast Climbing Work Platforms - (MMCWP)	<input type="checkbox"/> Goods Hoist - (GH)
<input type="checkbox"/> Transport Platform - (TPH)	<input type="checkbox"/> Passenger Hoist - (PH)
<input type="checkbox"/> Site Assessment - (SA)	
<input type="checkbox"/> Mobile Vertical+ - (3a+)	<input type="checkbox"/> Mobile Boom+ - (3b+)
<input type="checkbox"/> Static Vertical+ - (1a+)	<input type="checkbox"/> Static Boom+ - (1b+)



Once the category has been selected you can then select the instructor(s)

☒ **Select Course Instructors**

×

 Remove

Please Select

▼

Find Instructor

+

 Add Instructor

If the instructor is not showing in the drop-down list you can select Find Instructor and search for the instructor.

Then you need to enter the address where the course will take place.

You can enter this manually or select one of your company branches.

☒ **Location of Course**

Company/Location Name

Tel

Extended Address Info
(e.g. Business Park)

House No

Post Code

Street

Town / City

County

Clicking on a Branches or Satellite Company listed will auto enter the address stored with IPAF.

Company Branches

Post Code

IPAF Testing


LA7 7NU

Once all of the information has been submitted you need to Submit the course details.

3. Course list

You can edit or cancel a course up until 6pm the evening before the course is due to take place.

If you need to make any changes to a booking after this time please email info@ipaf-training.com and request the change.



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[Need Help? Click Here to Contact Us.](#)

Search

Find

Instructor No

Course Status

All status options ▼

Course Date between

And

Records per Page

10 ▼

run search


Your search returned 4 results

Course Ref	Categories	Instructor No	Course Date	Grade	Total	Course Status	Action
CRS-1374-2021421-15717	Static Boom	I/0008192	22-Apr-2021 08:00	Operator	Est = 6	Booked	<div style="display: flex; gap: 5px;"> <div style="border: 1px solid black; padding: 2px;">Edit</div> <div style="border: 1px solid black; padding: 2px;">View</div> <div style="border: 1px solid black; padding: 2px;">Cancel</div> </div>
CRS-1374-2021419-114516	Mobile Vertical	I/0005626	19-Apr-2021 08:00	Operator	Est = 4 Tot = 2	Completed	<div style="border: 1px solid black; padding: 2px;">View</div>
CRS-1374-2021419-125346	Harness	I/0005700	17-Apr-2021 10:00	Operator	Est = 10	Completed	<div style="border: 1px solid black; padding: 2px;">View</div>
CRS-1374-2021419-125311	Mobile Boom	I/0005626	01-Apr-2021 08:00	Operator	Est = 6 Tot = 4	Completed	<div style="border: 1px solid black; padding: 2px;">View</div>

page 1 of 1 results pages First 1 Last

4. Add an Application

Select 'Add an Application' then select the option to upload a photo.



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- [View Applications](#)
- [Distribution Portal](#)
- [Download User Guide](#)
- [Logout](#)

[Need Help? Click Here to Contact Us.](#)

Licence Application Section

Step **1** **2** **3**

Notes:
Quickly browse over the steps 1-3. Ensure that you have all the relevant information!

[Need Help? –Download User Guide here! \(Rev. 3\)](#)

New Mugshot Software (v3.1)

We have improved our Mugshot software, it now allows you to crop images to the right proportions to stop your card images coming out stretched or distorted, it also has a very useful rotate feature. You can [download it here](#).

[Click here to book a course](#)

Step **1** [Upload Photo](#)

First you need to upload an image of the applicant.

[Online mugshot now easier to use](#)


Step **2** **Application Form**

You need to have all the details to hand about the applicant.

Step **3** **Signature**

Have your password ready to confirm Licence application.

You then need to select Choose File, upload and crop to the correct size.



IPAF Application Photo

Instructions: Select a photo to upload using Browse then press Upload Photo to continue.

Please select a photo to upload

No file chosen

You need to select 'Click to find course'

☒ Applicant Details

Compulsory:
Find Course:

[Click to find course](#)

If the candidate has completed the MEWPs for Managers or Site Assessment eLearning course you need to select eLearning courses option at the top.

For all other training select the course from the below list.

e-Learning Courses

MM/SA e-Learning Theory Course

Search

Find

Course Date between

And

Records per Page

Your search returned 3 results

Action	Categories	Instructor No	Course Date	Grade	Total	Status	Course Ref
<input type="button" value="select"/> <input type="button" value="view"/>	Mobile Vertical	I/0005626	19-Apr-2021	Operator	Est = 4 Tot = 2	Completed	CRS-1374-2021419-114516
<input type="button" value="select"/> <input type="button" value="view"/>	Harness	I/0005700	17-Apr-2021	Operator	Est = 10	Completed	CRS-1374-2021419-125346
<input type="button" value="select"/> <input type="button" value="view"/>	Mobile Boom	I/0005626	01-Apr-2021	Operator	Est = 6 Tot = 4	Completed	CRS-1374-2021419-125311

page 1 of 1 results pages First 1 Last

When you first select the course you will be asked to upload the group photo that was taken on the day of the course and also confirm if any candidates failed the theory or practical tests.

Action	Categories	Instructor No	Course Date	Grade	Total	Status	Course Ref
<input type="button" value="view"/>	Harness	I/0005700	17/04/2021	Operator	Est = 10	Completed	CRS-1374-2021419-125346

Course Photos

Please upload a group photograph that includes all candidates on the course and the instructor(s) leading the course. Where it is not possible to include all present in one photograph, please upload multiple photographs and ensure that the instructor(s) are included in each photograph.

Photo

No file chosen

Unsuccessful Applicants

Please provide the following information on the number of applicants that were unsuccessful in the following areas:
Note: You will not be prompted again for this course.

Unsuccessful Theory: Unsuccessful Practical:



If you require a printed copy of the IPAF licence you need to select this tick box.

You can select the language that the licence is issued from the Requested Language dropdown.

Request a physical printed copy: ☐ (Note: This will incur additional charges based on application type)

Requested Language: English ▼

You now need to enter the candidate's details. If the candidate has downloaded the IPAF ePAL app and created their account you auto-populate their details by entering one of the below fields plus the date of birth (DoB).

If candidates details are auto populated, check these against the application form.

If the candidate has not created an account you can enter their details manually.

The details provided in this box can be used to auto-populate the application if an IPAF ID exists. A minimum of two fields are required for the search.

Please note if you are not auto-populating, the date of birth is mandatory.

E-mail:

Mobile:

IPAF ID:

DoB: / /

Check

Surname:

Forename:

House No:

Post Code:

For the CSCS logo to show on the candidates licence a check needs to be done on the CSCS website which is done by entering the candidate's national insurance number and selecting 'Check'.

Are you CSCS verified? Enter your NI Number in the box provided to see if you are eligible.

Check **Clear**



You need to enter the candidate's employer details. You can select to store these details for the next candidate if they have the same employer.

<input type="checkbox"/> Employer Details	
Name of Organisation:	<input type="text"/>
House No:	<input type="text"/>
Post Code:	<input type="text"/>
Tel:	<input type="text"/>
No & Street:	<input type="text"/>
Town / City:	<input type="text"/>
County:	<input type="text"/>
Fax:	<input type="text"/>
E-mail:	<input type="text"/>
To store employer details for next applicant check the box <input type="checkbox"/>	

Next enter a batch or purchase order number (this will be used on your invoice) and the quantity that you are uploading against this batch or purchase order number at this time. You can also store the course information and batch details to save on duplicate entry.

<input type="checkbox"/> Course Details	<input type="checkbox"/> Batch Details
Training Centre: IPAF Testing	Batch or PO number: <input type="text"/>
IPAF Instructor No <input type="text" value="I/0005626"/>	Please enter the number of applications that will be sent in this batch <input type="text"/>
Start Date: 01 / 04 / 2021	
Length Of Course (Days): 1	
To Store Course Details for Next Applicant check the box <input type="checkbox"/>	To Store Batch/PO No for Next Applicant check the box <input type="checkbox"/>

Select the categories that the candidate has been trained on and passed.

<input checked="" type="checkbox"/> Machine Categories (Check the boxes that the Applicant was trained to operate)		
<input type="checkbox"/> Static Vertical - (1a)	<input type="checkbox"/> Static Boom - (1b)	<input type="checkbox"/>
<input type="checkbox"/> Special - (SPECIAL)	<input type="checkbox"/> Mobile Vertical - (3a)	<input type="checkbox"/>
<input type="checkbox"/> Loading And Unloading - (LOAD)	<input type="checkbox"/> Mobile Boom - (3b)	<input type="checkbox"/>
<input type="checkbox"/> Harness - (H)	<input type="checkbox"/> Insulated Aerial Device - (IAD)	<input type="checkbox"/>
<input type="checkbox"/> Mewps For Managers - (MM)	<input type="checkbox"/> Push Around Vertical - (PAV)	<input type="checkbox"/>
<input type="checkbox"/> Mast Climbing Work Platforms - (MCWP)	<input type="checkbox"/> Pre-Delivery Inspection - (INSP)	<input type="checkbox"/>
<input type="checkbox"/> Mobile Mast Climbing Work Platforms - (MMCWP)	<input type="checkbox"/> Goods Hoist - (GH)	<input type="checkbox"/>
<input type="checkbox"/> Transport Platform - (TPH)	<input type="checkbox"/> Passenger Hoist - (PH)	<input type="checkbox"/>
<input type="checkbox"/> Site Assessment - (SA)	<input type="checkbox"/>	<input type="checkbox"/>

Then click 'Submit'.

Once a final check has been done you need to confirm the application.

If Any Details are incorrect Click the Back Button at the top of the Browser to amend the Details	
To confirm that the above named applicant has completed the IPAF training course for operating the machinery detailed above, and that he/she has passed both the theory and practical achievement tests click the 'Confirm' button.	
<input type="button" value="Confirm"/>	<input type="button" value="Back"/>

5. Submit a Replacement Request

Select 'Add an Application' and scroll to the bottom of the page. Click on the Application Form under the Replacement Request.

Replacement Request

Step. 1	Application Form	You need to have all the details to hand about the applicant.
Step. 2	Submit Request	Submit requested replacement for approval.

Fill out all of the compulsory fields. Add the licence number for the details to auto-fill. You can correct any spelling mistakes by filling the details in correctly.

☒ **Applicant Details**

Compulsory:
Requested Language: English

The details provided in this box can be used to auto-populate the application if an IPAF ID exists. A minimum of two fields are required for the search.

Please note if you are not auto-populating, the date of birth is mandatory.

E-mail:
Mobile:
IPAF ID:
DoB: dd / mm / yyyy

Check

Replacement Type: Card and Certificate

IPAF No:
Surname:
Forename:
House No:
Post Code:

Choose to order a replacement card only and/or a certificate in the drop down menu. (Digital only will allow updates to digital licences, for example spelling mistakes).

Replacement Type: Card and Certificate

IPAF No:
Surname:
Forename:
House No:

Card and Certificate
Card Only
Certificate Only
Card and Certificate
Digital Only



There is an option to replace an existing photo. You need to select the tick box next to 'replace existing photo? (Y/N)'. When you submit the application it will take you to a new page, which will allow you to upload the new photo.

Optional:
Replace existing photo? (Y/N): ☒

To request a replacement PAL Card with the CSCS logo on, enter the card holder's National Insurance Number in the section below:

(the PAL Card holder needs to have undertaken the CITB touch screen Health, Safety & Environment test within the last 2 years)

Are you CSCS verified? Enter your NI Number in the box provided to see if you are eligible.

You will need to enter a Batch or PO number when submitting the application, and the number of applications you are submitting in this batch.

☒ **Batch Details**

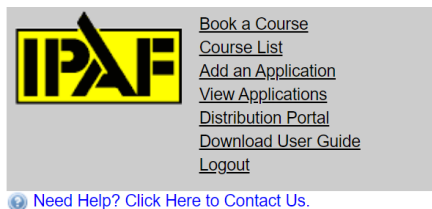
Training Centre:	IPAF Test
Batch or PO number:	<input type="text"/>
Please enter the number of applications that will be sent in this batch	<input type="text"/>



6. View Applications

You can search for licences and see the status of an application.

You can search by different date ranges and also on the application status.



Search	
Find	<input type="text"/>
DoB	<input type="text"/>
Company	<input type="text"/>
Batch Status	<input type="text" value="New"/>
Course Date between	<input type="text" value="All"/>
And	<input type="text" value="New"/>
	<input type="text" value="New/Incomp"/>
	<input type="text" value="Fail"/>
Records per Page	<input type="text" value="10"/>
	<input type="text" value="Approved"/>
	<input type="text" value="Error"/>
<input type="button" value="run search"/>	

If a physical licence was selected when the application was uploaded it will show the SP (Smart PAL) symbol.

15-Oct-2021 15:32		OP/1975319	Operator
24-Sep-2021 15:44	SP	OP/1960642	Operator

You can also select the application and it will show if a physical licence was requested.

Request a physical printed copy:	No
---	-----------



7. Documentation

The documentation section is where you will find, view and download the most recent training manual, forms and system guides.

You can select which language you want to view the documents in by choosing the language from them dropdown list.



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 [Need Help? Click Here to Contact Us.](#)

[Return To Home](#)

English ▼

Documentation Listing

IPAF MEWP Training Manual 2021

IPAF MEWP Training Manual 2021

[View Document](#)

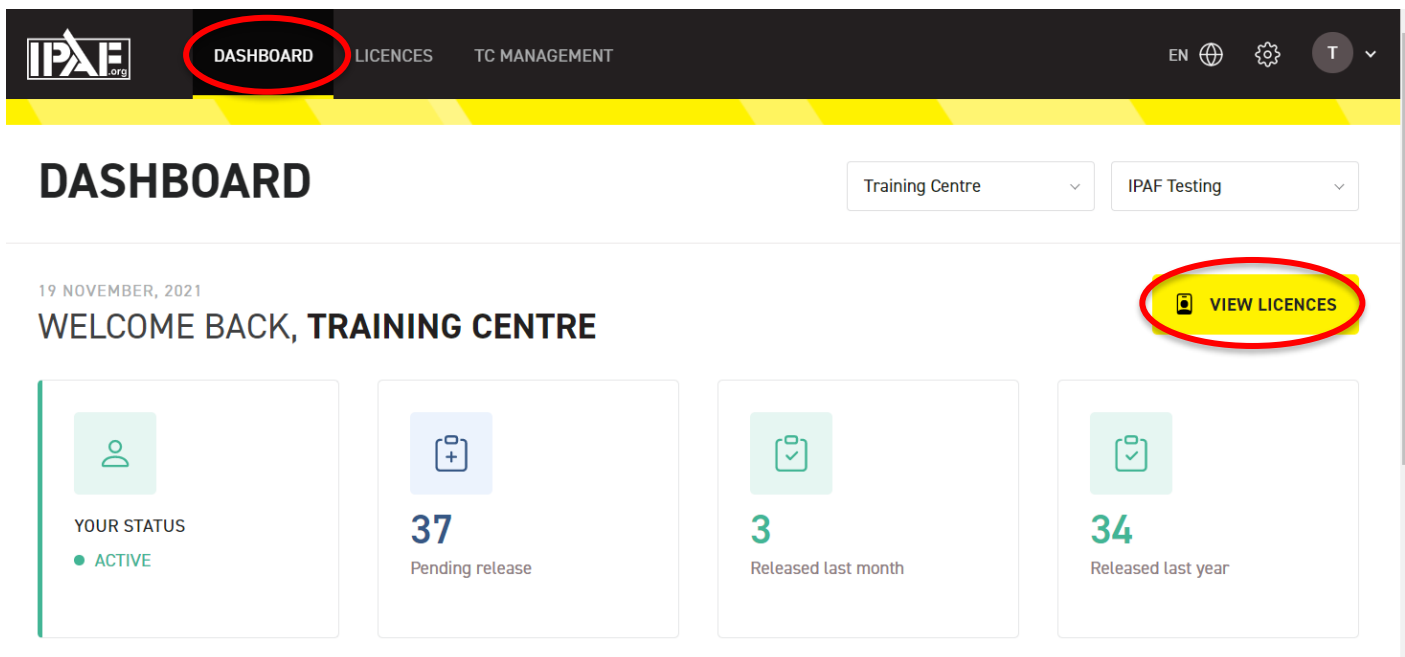
Published On: 06-Jan-2021 11:51:36

8. Distribution Portal

The distribution portal is where you manage the distribution/release of the digital licences to the candidates.

The Dashboard will show you the number of licences that have been distributed over time.

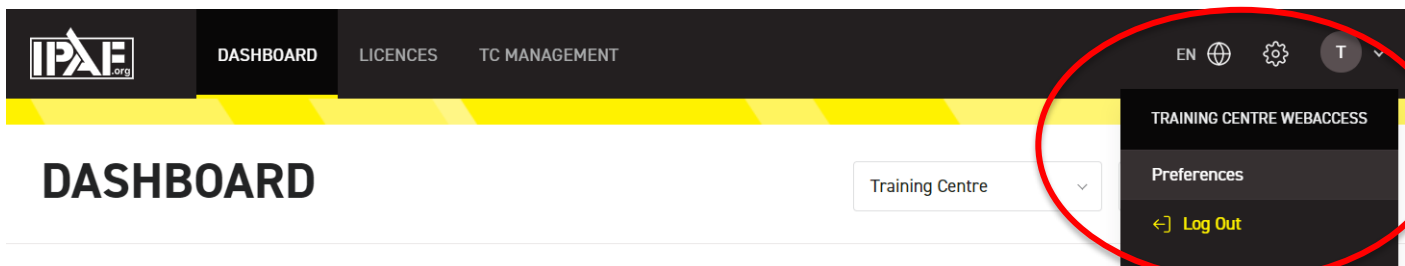
Selecting 'View Licences' will take you to the licences screen.



The screenshot shows the IPAF Dashboard interface. The top navigation bar includes the IPAF logo, a 'DASHBOARD' tab (highlighted with a red circle), and links for 'LICENCES' and 'TC MANAGEMENT'. On the right, there are links for 'EN', a globe icon, a settings gear, and a user profile 'T' with a dropdown arrow. Below the navigation bar, the main heading is 'DASHBOARD', followed by two dropdown menus for 'Training Centre' and 'IPAF Testing'. The date '19 NOVEMBER, 2021' is displayed, along with a welcome message 'WELCOME BACK, TRAINING CENTRE'. A 'VIEW LICENCES' button (highlighted with a red circle) is located in the top right corner. The dashboard features four status cards: 'YOUR STATUS' (ACTIVE), '37 Pending release', '3 Released last month', and '34 Released last year'.

The licences screen is where you will manage the distribution of the digital licence.

You can set your preferences by selecting in the top right corner and choosing preferences.



This screenshot shows the same IPAF Dashboard interface as the previous one, but with the user profile dropdown menu open. The menu is highlighted with a red circle and contains the following options: 'TRAINING CENTRE WEBACCESS', 'Preferences', and 'Log Out' (with a yellow arrow icon).



From here you can manage your preferences which include choosing whether all of the licences that are sent to you for distribution are distributed automatically or manually.

You can also choose to receive a notification email when training has been sent to you for distribution and this can be done per batch, daily or weekly.

DISTRIBUTION PREFERENCES



IPAF TESTING

Would you like the Distribution Portal to automatically issue licences or take manual control?

MANUAL

Would you like to receive notifications of new licences pending action?

YES

Frequency of notifications when new licences are available

Per Batch ▾

DISTRIBUTION EMAILS

itsupport@ipaf.org

CLOSE

SAVE CHANGES


Release

Selecting this option will distribute all of the applications that you have selected.

☒ RELEASE

This option will release only that licence



<input type="checkbox"/>	OP/1967354	Thu, 29 Apr 2021 15:03:49	test test	Pending	Thu, 29 Apr 2021 15:13:07	I/0005626	3b	Mon, 19 Apr 2021	Active	Test	test	<input checked="" type="checkbox"/>	
--------------------------	------------	---------------------------	-----------	---------	---------------------------	-----------	----	------------------	--------	------	------	-------------------------------------	---

Export

 EXPORT

You can export the data to an Excel or you can export a Zip file which will contain PDFs of the cards and certificates of the candidates.

EXPORT PREFERENCES

☐ Export data to Excel
 ☐ Export cards/certificates to PDF (zipped file)

WHICH RECORDS WOULD YOU LIKE TO EXPORT?

☒ Selected records
 ☐ All records (Maximum of 200 records)

CLOSE

EXPORT

Share



The share option will allow you to share the candidates training easily with your customer. You can copy this information to your clipboard and paste it into an email. The 'Get Record' option will download a PDF of the licence.

SHARE OPTIONS												X	
CLOSE		COPY TO CLIPBOARD											
IPAF No	Entry Date	Name	Distribution Status	Distribution Date	Instructor(s)	Categories	Course Date	Licence Status	PO Number	Employer Details	Certificate Link		
OP/1966115	Wed, 28 Apr 2021 12:54:36	eleven test	Complete	Wed, 28 Apr 2021 13:23:58	I/0005626	MM	Thu, 01 Apr 2021	Active	28/04/21 test1	test	Get Record		
OP/1966116	Wed, 28 Apr 2021 12:55:36	twelve test	Complete	Wed, 28 Apr 2021 13:23:58	I/0005626	3a	Thu, 01 Apr 2021	Active	28/04/21 test1	test	Get Record		

You can filter and search for records.

ADD FILTERS												SHOW 10	ENTRIES	SEARCH:	
COURSE DATE	DISTRIBUTION STATUS	NAME	DISTRIBUTION STATUS	DISTRIBUTION STATUS DATE	INSTRUCTOR(S)	CATEGORIES	COURSE DATE	LICENCE STATUS	PO NUMBER	TRAINING CENTRE	EMPLOYER DETAILS	ACTIONS			
Entry Date		test test	Pending	Thu, 29 Apr 2021 15:13:07	I/0005626	3b	Mon, 19 Apr 2021	Active	Test	IPAF Testing	test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Grade		testtttt	Pending	Thu, 29 Apr 2021 14:57:09		3a	Thu, 01 Apr 2021	Active	Testtttt	IPAF Testing	TEST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

To download and view a PDF of the licence you need to select the below icon



Licence distribution status.

A licence will show as pending until it has been released. Once it has been released the status will change to complete.

DISTRIBUTION STATUS	DISTRIBUTION STATUS DATE	INSTRUCTOR(S)	CATEGORIES
Pending	Thu, 29 Apr 2021 15:13:07	I/0005626	3b
Pending	Thu, 29 Apr 2021 14:57:09		3a
Complete	Wed, 28 Apr 2021 16:04:06	I/0005626	3a

When you see a symbol next to the licence number this tells you that the licence has been claimed by the candidate.

<input type="checkbox"/>	IPAF NUMBER
<input type="checkbox"/>	OP/0005947 <input checked="" type="checkbox"/>

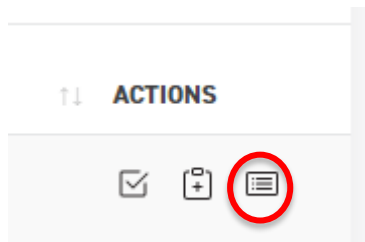
Automated communications

When a licence is released one of the following communications is sent to the candidate, if an email or mobile number has been entered at the application upload stage. The automated communication will always default to email if one has been entered.

- Email to candidate - licence is ready and in ePAL**
When a licence has been linked to an IPAF ID (using auto-populate) during the application upload stage.
- Email to candidate - licence is ready, download ePAL and link licence**
When an email has been included but not linked to an IPAF ID, usually due to the candidate not creating an IPAF ID before the training course.
- SMS to candidate - licence is ready and in ePAL**
As number 1, but only has a mobile number.
- SMS to candidate - licence is ready, download ePAL and link licence**
As number 3, but only has a mobile number.

If no email or mobile number has been included at the application stage, no notification is sent to the candidate. You will need to provide the relevant details including proof of training to your customer. The candidate can at a later stage download ePAL and manually link their licence.

You can reissue the communications sent to the candidate by selection the below symbol.



By selecting this you can choose to resend the notification email to the end user and you can also the update the email address or mobile number that the notification is sent to.

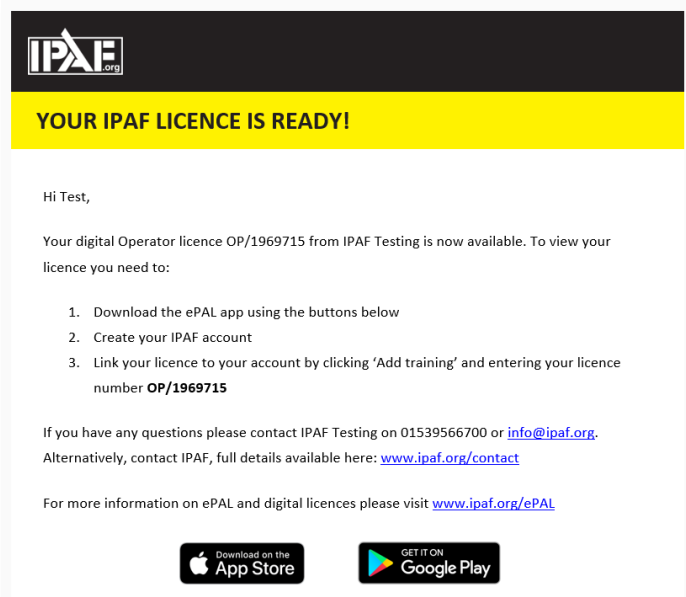
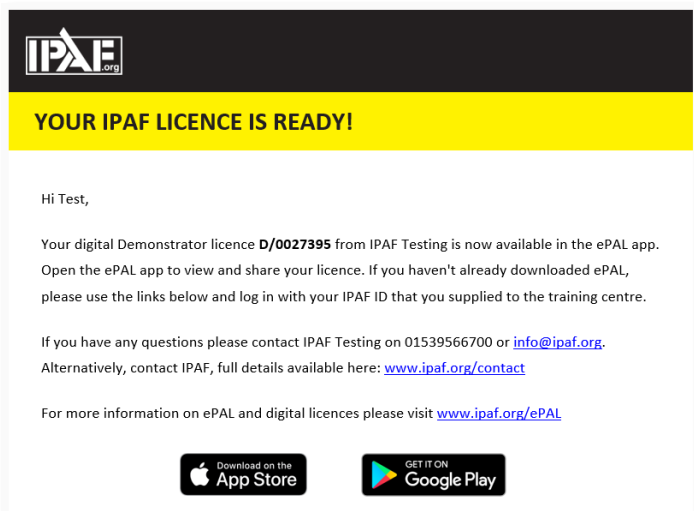
COMMUNICATIONS HISTORY

Date/Time Sent	Sent Via	Sent To	Locale	Message Title
Fri, 05 Nov 2021 13:19:07	Email	testuser@trainingcentre.com	en-GB	Your Licence is Ready!
Thu, 04 Nov 2021 13:19:07	SMS	+447999111222	en-GB	Your Licence is Ready!
Wed, 03 Nov 2021 13:19:07	SMS	+447999111222	en-GB	Your Licence is Ready!
Tue, 02 Nov 2021 13:19:07	Email	testuser@trainingcentre.com	en-GB	Your Licence is Ready!

RESEND MESSAGE

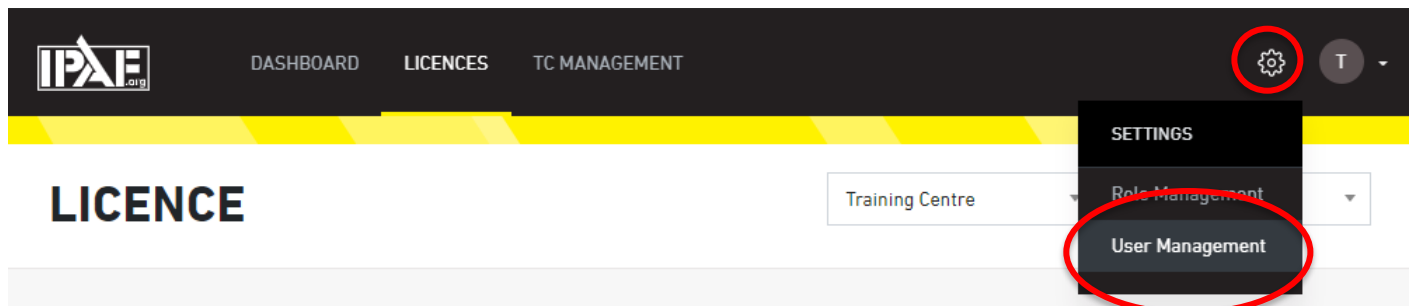
CLOSE

Examples:



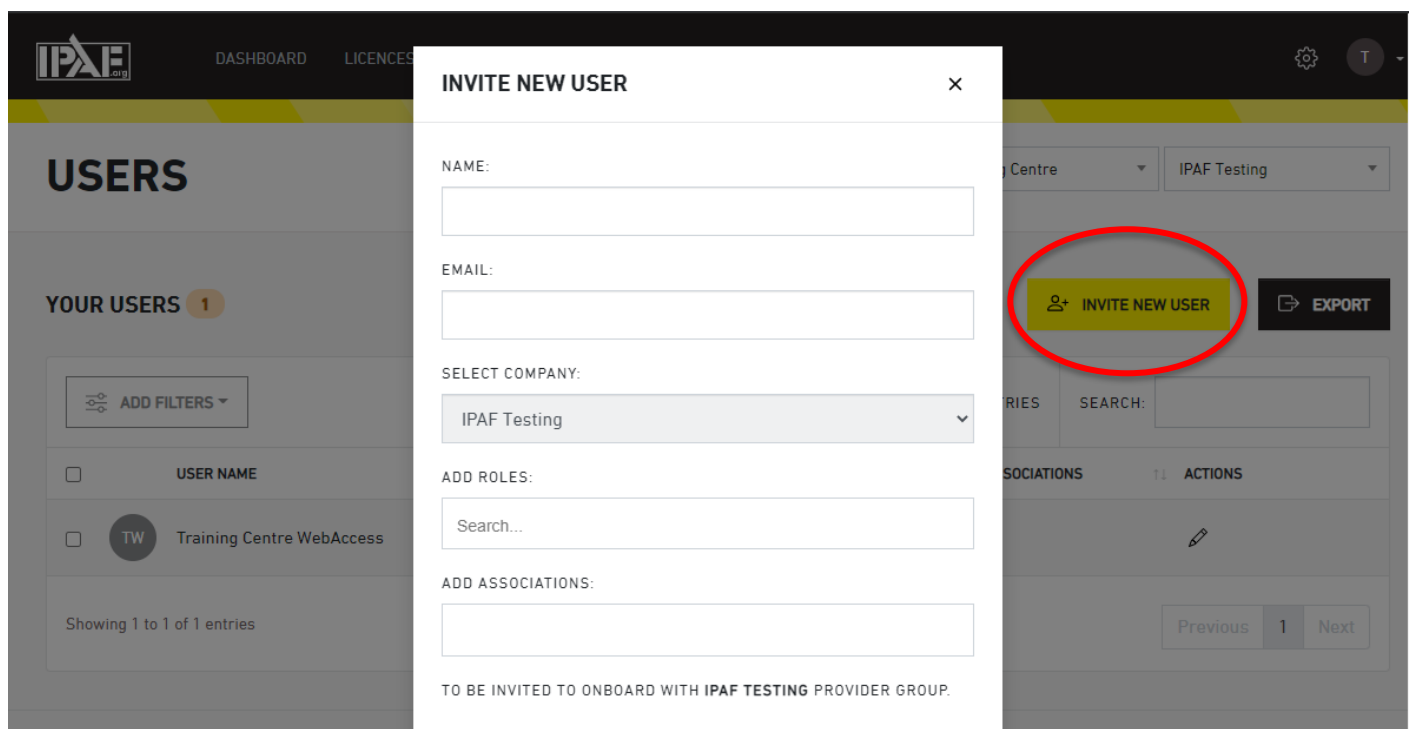
9. User Management

User management is where you add users and set their permissions. Select the settings symbol, then User Management.



The first step is to invite the user. Fill in their details, select their role in your company. Then click to send the invite to the user by email.

If the user already has an IPAF ID, they can use this to log in and accept. If the user does not yet have an IPAF ID, it will direct the user to the sign up page.



Roles

There are pre-set roles available and you can also create custom roles to fit your needs.