About This Guide

This Guide presents the information, guidelines, and procedures necessary to use the IPC Certification Portal. Please read this Guide before attempting to use the system.

This Guide describes aspects of the new IPC Certification process: how to view historical certification data, schedule classes, enroll students, provide online exams, enter student grades, and validate certifications.

Every effort has been made to ensure the accuracy of the information in this Guide. The descriptions and software screens in this Guide may not reflect exactly the current design or all of the options available to our users.

Disclaimer

IPC, Inc. reserves the right to modify and/or improve the IPC Certification Portal software and database, without thereby committing to revising the existing publications, provided those modifications and/or improvements do not alter the functional features or the performance of the software.

We welcome any suggestions and/or recommendations that you may make in order to make improvements regarding the attached materials or the software itself.
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The purpose of this document is to introduce users to the IPC Certification Quality Initiative (CQI) and provide guidance on use of a number of new processes. CQI enhances the quality, security, and value of an IPC Certification. The IPC Certification Portal tool is projected to accommodate a wide range of computer operating systems and browsers, as well as tablet devices.

This Guide makes references to “scheduling a class” and “enrolling students”. The CQI system is not intended for or capable of replacing internal company procedures for scheduling courses. All companies should continue to maintain their own records and should not use this CQI tool as a method of doing so.

All training and certification must be in accordance with the IPC Professional Training and Certification Policies and Procedures.

The focus of CQI is an online examination model, where trainers can purchase multiple versions of scrambled exams. The new process will continue to accommodate paper examinations as well as online testing. Another advantage of the on-line testing is automated reporting that eliminates the need to submit training reports. Trainers using paper testing also can enter certification results online.

Implementation of CQI will be in phases. Not all CIS and CIT CQI options will be available initially. During this transition, MITs and CITs will have at least one of these options available.

1. Continue to use the printed exam booklets provided with the training kits. This requires purchasing and issuing IPC serialized certificates and submitting training reports.
   a. Use the new online training report discussed in Chapter 4 of this Guide.
   b. Use traditional MS Word training report emailed to IPC.

2. Use the CQI systems to conduct testing on-line or with preprinted exams uniquely scrambled for each student or the same exam for each class.
1.1 OVERVIEW

This chapter provides an overview of the general features of the IPC Certification Portal. The Portal enhances the quality, security, and value of the IPC certification.

Depending on the level authorization, explained later in this Guide, the Portal allows users to:

- Validate certification
- View certification history
- View internal company certifications
- View external certifications conducted by your company
- Schedule a class/exam in the CQI system
  - Apply invoices
  - Enroll students
  - Modify registrant lists
  - Close a class/exam session
  - Add grades for paper exam modules
  - View student grades

1.2 HOME PAGE

Use any standard browser to access the IPC Certification Portal (certification.ipc.org) and display the Portal Home page.
1.2.1 **IPC TRAINING AND CERTIFICATION WEBSITE (TAB)**
Use this tab to access the IPC.org Knowledge page.

1.2.2 **TAKE AN ONLINE EXAM (TAB)**
This tab is used to administer exams through the CQI system. Managing the exam process is covered in section 4.7 of this Guide.

1.2.3 **EMAIL THE IPC CERT TEAM (TAB)**
This tab enables a user to send a message directly to a member of the certification team.

1.2.4 **HELP (TAB)**
This tab enables a user to access the *CQI User’s Guide*, review frequently asked questions, and contact information for IPC customer service, certification, and training personnel.
Use the IPC Certification Portal to validate an active certification by entering the student’s name, certification number, and program.

**To validate a certificate:**
1. Click **Certification Validation** to access the validation page.
2. Enter the **Last Name** of the student.
3. Use the dropdown menu to select the **Program** (course, class).
4. Enter the **Student’s Certification #** (number).
5. Click **Search** to access the Certificate Validation information.
3 Log In and IPC Profile

Logging in is the first step for any current Certified IPC Trainer (CIT), Master IPC Trainer (MIT), CIS Certification Representative (CIS Cert Rep), or CQI Program Administrator (CQI Admin). Not all functions are available to every user.

3.1 LOG IN

Click Log In located in the upper right corner of the Home Page or click Log in to access the full functionality of the IPC Certification Portal on the Portal Main Menu.

To Log In:
1. Click Log In.
2. Enter E-mail.
3. Enter Password.
4. Click the message at the bottom left of the screen to request help to retrieve a forgotten user name or password. Follow the instructions on the screen.
To Retrieve Password:

1. Enter the user’s e-mail.
2. Type the privacy code in the text box.
3. Click **Retrieve Password**.
   The password will be sent to the user’s email address.

### 3.2 VIEW IPC PROFILE

Click **View IPC Profile** (upper right corner) to view the user’s contact information as listed in the IPC database. Click **Manage Account** to access the Login Information dialog box.
3.2.1 **EDIT MY PROFILE (TAB)**

Click **Edit My Profile** to access the Edit Profile dialog box. Update the profile information as needed and click **Accept** (bottom right) to save the changes. Click **Cancel** to clear the entries and return to the Edit My Profile screen.

Name, Job Function, Department Function, and E-mail address are required fields. The email address is a key field because it is the login ID for all interactions with the Portal.
3.2.2 **CHANGE PASSWORD (TAB)**
Click **Change Password** to access the Change Password dialog box. Enter and confirm the new user password. Use the Change User Name link to change the user name. Click **Save** to accept and save the change. Click **Cancel** to clear the entries and return to the Edit My Profile screen.

![Change Password Dialog Box](image)

3.2.3 **CHANGE USER NAME (TAB)**
Click **Change User Name** to access the Change Login Information dialog box. Enter the New Username and Password to change the profile. Click **Save** and then **OK** to accept and saves the changes. Click **Cancel** to clear the entries and return to the Edit My Profile screen.

![Change User Name Dialog Box](image)
3.2.4 **MY DOWNLOADS (TAB)**
Click **My Downloads** to access a list of downloadable products (purchases and history). Downloads can be searched by Title or Product ID. Contact Customer Service for more information. Click **Close** to return to the Edit My Profile screen.

![Image of My Downloads tab with search options and instructions](image_url)
3.2.5 **MY INVOICES (TAB)**

Click **My Invoices** to access a list of invoices purchased for exams (see Chapter 4 for more information). Invoices can be searched by Title or Product ID. Contact Customer Service to purchase exam invoices. Click **Print** to print a copy of the invoice list. Click **Close** to return to the Edit My Profile screen.
3.2.6 **MY INTERESTS (TAB)**

Click **My Interests** to access a list of interest categories. Select from the list by checking the box in front of the corresponding interest. The information will be updated on the user’s profile. Click **Save** to accept and save the change. Click **Cancel** to clear the entries and return to the Edit My Profile screen.
4 Using the Portal as a CIT/MIT

4.1 OVERVIEW

This chapter describes the features of the IPC Certification Portal available to a Certified IPC Trainer (CIT) or Master IPC Trainer (MIT). Trainers may validate a certificate, view personal certifications, view classes, edit classes, add a class, and enroll students. In addition, through the Portal users can access the ipc.org website to get information about IPC training and certification, connect via email with the IPC Cert Team, or take an online exam for enrolled classes.

Prior to scheduling a class using the on-line exam option, the trainer must contact IPC Customer Service to order exams. The trainer will use an invoice (see section 4.7) when scheduling a class. Prior to scheduling a class using the paper exam option, the trainer must purchase paper certificates for the course through Customer Service.

4.2 LOG IN AS CIT OR MIT

Follow the instructions in Chapter 1 to access the IPC Certification Portal and display the Home Page. Log in as a CIT or MIT from the Home Page.

To Log In:

1. Click Log In (upper right corner).
2. Enter User Name.
3. Enter Password.
4. Click Log In (gray box).
4.3 CIT/MIT LANDING PAGE

The CIT/MIT landing page is almost the same as the general Home Page accessed when first logged into the IPC Certification Portal (see Chapter 1). The additional features are a Go to… tab and the My Certification Summary, View/Edit Classes, and Invoice Amount Used links on the Main Menu.

4.3.1 GO TO… (TAB)

Click the Go to… tab to open a dropdown menu listing the same links as the bulleted items on the screen: Certification Validation, My Certification Summary, View/Edit Classes, and Invoice Amount Used.

4.3.2 IPC TRAINING AND CERTIFICATION WEBSITE (TAB)

Click the IPC Training and Certification Website tab to go to the IPC.org Knowledge home page for general information about IPC Certification Programs.

4.3.3 TAKE AN ONLINE EXAM (TAB)

This tab is used to administer exams through the CQI system. Managing the exam process is covered in section 4.6 of this Guide.
4.3.4 **EMAIL THE IPC CERT TEAM (TAB)**
Click the **Contact the IPC Cert Team** tab to open an email and send a message directly to a member of the certification team.

4.4 **CERTIFICATION VALIDATION**
The IPC Certification Portal allows CIT/MITs to validate any active certification by entering the student’s name, certification number, and program. The instructions for validating a certification are given in Chapter 2. IPC Standard Certificate Validation provides information on the status, course name, expiration date of the certificate, and the name of the trainer and company responsible for the issuing the certificate.
4.5 **MY CERTIFICATION SUMMARY**

CITs/MITs can use the My Certification Summary link to review the user’s certification history. The user’s summary will display listing all programs the user has completed, the expiration date and number of certifications, and the name of the trainer and company responsible for the issuing the certifications. Also, any IPC certified user can view his/her own certificates using this link.

Click **Printer Friendly** to open a new window with just the certification information that can be printed directly. Click **Excel** to open the certification information in an Excel spreadsheet. This option is useful for sorting if there are many programs and certificates.
4.6 **VIEW/EDIT CLASSES**

The View/Edit Classes link is the most critical feature available through the CIT/MIT landing page. It permits MITs, CITs, and CQI Program Administrators (CQI Admin) to view the Class List showing pending classes and completed classes, and to add a new class. To access the Class List, click **View/Edit Classes**.

From the View/Edit Class screen, trainers will see a class or classes they taught or are scheduled to teach. CQI Administrators will see all the schedules for all the trainers in their company. If no classes are found, a corresponding message displays.

If no classes are pending or have been completed, the trainer can click **Return to Home** to go to the CIT/MIT Landing Page or click **Enter New Class** to schedule a new class. During the course scheduling process, a selection is made for a paper exam, online exam, and online-print exam. Depending on the selection of testing method,
the trainer and student get a different set of steps. For more information, see Chapter 5 (Manage On-Line Exam Courses) and Chapter 6 (Manage Report Entry/Paper Exam Courses). On-Line Print Exam Courses are not available at this time through the CQI Portal.
4.7 **Invoice Amount Used**

The Invoice Amount Used link is used only when scheduling an on-line exam course (see Chapter 5). Use the link to view a list of invoices organized by the invoice number. For each invoice, the number of scheduled classes for that invoice, and its original amount, amount scheduled, and amount remaining are shown. Click on an invoice to display detail information (e.g., trainer, course start/end dates, location, number of students, cost per student, and amount used).
5 Manage On-Line Exam Courses

5.1 OVERVIEW

This chapter covers scheduling a course that uses on-line exams. (Scheduling a course using print exams is covered in the next chapter.) Prior to scheduling an on-line course, an active invoice must available. Purchase exams through the IPC Customer Service Department over the telephone or via email.

5.2 SCHEDULING ON-LINE EXAM COURSES

To schedule a new On-Line Exam course:

1. Log in and click **View/Edit Classes** on the Home – IPC Certification Portal Main Menu to access the Class List. Click Enter New Class to display the Add Class screen.

2. Click **Enter New Class** to display the Add Class screen.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Program</th>
<th>Type</th>
<th>Trainer Employer</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Country</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8/6/2013</td>
<td>8/7/2013</td>
<td>CIS</td>
<td>PC</td>
<td>PC</td>
<td>390 Lakeside Drive, Suite 005</td>
<td>Bannockburn</td>
<td>IL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/6/2013</td>
<td>8/7/2013</td>
<td>CIS</td>
<td>Online</td>
<td>PC</td>
<td>390 Lakeside Drive, Suite 005</td>
<td>Bannockburn</td>
<td>IL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/5/2013</td>
<td>9/9/2013</td>
<td>CIS</td>
<td>PC</td>
<td>PC</td>
<td>390 Lakeside Drive, Suite 005</td>
<td>Bannockburn</td>
<td>IL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**COMPLETED CLASSES**

*** No Completed Classes found ***

*To modify scheduled classes, please contact IPC*
3 Select the **Program** from the drop down menu. Select CIS or CIT. (The program default is CIS for CITs.)

4 Select the **Course Name** from the drop down menu (e.g., A-610, J-STD-001, etc.).

5 Select the **Modules** for the class (check the box in front of the module).

   **Note:** When a course name is selected, the modules for that course display. By default, the mandatory modules are selected. The trainer may select all of the modules for the course by clicking the box to the left of Module Name, or select (deselect) any module by clicking on the corresponding box.

   **Note:** If all students are not taking the same module, a new class will need to be scheduled for the different selection of modules.

6 Select the **Trainer’s Employer** - the company/employer the trainer is representing while teaching the classes that are being scheduled).

   **Note:** The Trainer’s Employer will default to the employer used at log in. If this is not the same as the employer for the course, the trainer can scroll through the listing or click the column header for any of the parameters (Name, Address, City, State, Country) to sort the column alphanumerically. The trainer can also click the arrow (▼) to open a filter to sort the data in that column using specific search parameters.
7 Select **On-line** for the Exam Type.
The Invoice table will display for on-line exam course. (See previous section 4.7, *Invoices* for more information.)

8 Enter **Start Date** - the date exams should be available to the students. (Use the drop down calendar.
Enter **End Date**. Schedule only modules that can be completed within the time specified. (Use the drop down calendar.)
9  Select **Invoice(s)** from the drop down menu. (More than one invoice can be selected and used to cover course costs.)

10  Enter any **Comments** about the class.

   Note: Class comments are relayed directly to IPC certification staff after submission. If questions or comments arise during training, select the Email IPC Cert Team tab or send an email to certification@ipc.org. Alternatively, click **Help** and **Contact Us**.

11  Click **Add** when all of the information has been input in the required fields to schedule the class and save the information.

   Click **Cancel**. Closing the screen without clicking the Add button will clear everything entered into the fields and exit the Add Class screen.
5.3 **ENROLLING STUDENTS IN AN ON-LINE EXAM COURSE**

The Portal allows the trainer or CQI Admin to enroll students who are already in the IPC database and/or already certified. The system accepts the student’s IPC ID#, or his/her previous certification number. If the student is new to the IPC database (no IPC ID number), then a form will be available for the CIT or CQI Admin to enter the information for that new student.

*Note: All students must have an email address to view records or to be able to login for testing. If the student does not have one, he/she can create one prior to class using Gmail, Yahoo, Hotmail, or any other free email provider.*

To Enroll a Student:

1. Click **View/Edit Class** on the CIT landing page to access the Class List.
2. Click the **Course Number** (underlined) to access the View Class Detail screen.

3. Click **Enroll Student** (bottom left) to access the Enroll Student screen. Choose from the following options:
   - Enter the Student IPC ID#
   - Enter the student’s Last Name, Program, and Certificate #
   - Enter the student’s Last Name and First Name and click **Search** to search the database for the student’s record, if the student’s IPC ID# or Certificate # is not known.
Enrolling Students

Using the Portal as a CIT

View Class Details

- Trainer: Tom QI
- Program: CIS
- Course: IPC-A-610
- Modules:
  - Module 1
  - Module 2
  - Module 3
  - Module 4
  - Module 5
  - Module 6
  - Module 7
  - Module 8
  - Module 9

- Training Company/Employer: IPC, 1000 Lakeside Drive, Suite 1000, 3
- Start Date: 08/06/2013
- End Date: 09/07/2013
- Exam Type: Paper
- Package Order: 3
- Comments:

Enroll Student

*** No Students found ***

Enroll Student

FAST ADD

- Student IPC ID:
- ADD

LAST NAME
(Family Name/Surname)

Program:

Student's Certificate:
- ADD

FIND STUDENT

LAST NAME:
(Family Name/Surname)

FIRST NAME:

SEARCH
4 Click the full name of the student (underlined) to be enrolled. Verify the student name and contact information. (All students must have an email address to enroll.)

If the student can not be found:

- Click a name in the list or return and modify the FIRST NAME by entering less characters and SEARCH again.
- Click Add New Student and enter the required information.
5 Click **ADD** to enroll the student in the class.
5.4 VIEWING CLASS DETAILS

To View Class Details:

1. Click View/Edit Classes on the CIT landing page to access the Class List screen.

2. Click Enter New Class to display the Add Class screen.

3. Click the Course number to View Class Details (available courses are underlined).
Once a class/exam is added to the system, a trainer or CQI Administrator can view, edit, or cancel an exam session. Classes may only be deleted if student grades have not been posted. Once a class is submitted, class information, and roster cannot be edited. Change requests must be sent to certification@ipc.org.

**To Edit a Class:**

1. Click **View/Edit Classes** on the CIT landing page to access the Class List screen.
2. Click on the course number to view class details (available courses are underlined).
3. Click **Edit** on the bottom left to access the Edit Class screen.

From this screen, change the mix of Modules that comprise the class, change the Start and/or End dates, change the Exam Type (online/paper), and add Comments.

*Note: Modules can not be updated once students have been enrolled.*
5.6 MANAGING THE ON-LINE EXAM PROCESS

When the trainer selects the on-line exam option to be used for the certification class, the exams will be available directly to the students through the IPC Certification Portal. The questions and answers are randomized for each exam.

5.6.1 LOG INTO THE TEST SITE

Access to the test site requires a dual login on each computer. The trainer enters his/her login credentials and the class table displays. The trainer must select the class to enable the student to log in.
Managing the On-Line Exam Process

Using the Portal as a CIT

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Then as prompted, the student logs in and is able to view his/her user information and take tests.

Note: The trainer must be present at all times during the exam.

5.6.2 Take a Test

To Take a Test:

1. Log in to access the Test Site screen.
2. Click Take a Test to access the available items program tests.
3. Click the desired Program Content to access the Take a Test – Select Taking a Test screen to see exactly how the exam is structured and how many questions there are.
4 Click **Start Taking This Test** to access the first test question.
Take the exam. Click boxes to select answers to the questions.

**BACK BUTTON** move backward to review/change prior answers

**RESTART** stop and restart the exam

**SKIP** skip a question
### 5.6.3 REVIEW TEST RESULTS
Once exams are completed, the trainer can view his/her students’ results in one location. Results are posted automatically for online exam and are available for paper exams after the trainer enters the grades.

If a class finishes before the established end date, the CIT must edit the class and change the end date. **Submit to IPC** will not display before the end date.

### 5.6.4 ISSUE CERTIFICATIONS
When a student has successfully completed the mandatory modules, he/she will be presented with the option to open the earned certification. Selecting the option opens the certificate in a separate window. The user should save and print the certification before continuing to complete other modules.

#### View Class Details

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Jack Crawford</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>CIS</td>
</tr>
<tr>
<td>Course</td>
<td>IPC-A-610</td>
</tr>
</tbody>
</table>

#### Modules

<table>
<thead>
<tr>
<th>Module Name</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CIS A-610 Modules 1 &amp; 2 Open</strong></td>
<td>YES</td>
</tr>
<tr>
<td><strong>CIS A-610 Modules 1 &amp; 2 Closed</strong></td>
<td>YES</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 3</strong></td>
<td>NO</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 4</strong></td>
<td>NO</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 5</strong></td>
<td>NO</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 6</strong></td>
<td>NO</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 7</strong></td>
<td>NO</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 8</strong></td>
<td>NO</td>
</tr>
<tr>
<td><strong>CIS A-610 Module 9</strong></td>
<td>NO</td>
</tr>
</tbody>
</table>

#### Training Company/ Employer

IPC, Bannockburn, 3000 Lakeside Drive, Suite 3055, IL

- **Start Date:** 08/12/2013
- **End Date:** 08/12/2013
- **Exam Type:** Paper

#### Comments:

- **Edit Class**
- **Cancel**

#### Enroll Student

<table>
<thead>
<tr>
<th>NAME</th>
<th>IPC ID#</th>
<th>Company</th>
<th>CERTIFICATE NUMBER</th>
<th>STATUS</th>
<th>Email</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carol Smith</td>
<td>1378244</td>
<td>IPC</td>
<td></td>
<td>Pending</td>
<td><a href="mailto:janet@ipc.org">janet@ipc.org</a></td>
<td>Delete</td>
</tr>
<tr>
<td>Disney Mark A</td>
<td>1410556</td>
<td>IPC</td>
<td></td>
<td>Passed</td>
<td><a href="mailto:MarkDisney@ipc.org">MarkDisney@ipc.org</a></td>
<td>Delete</td>
</tr>
</tbody>
</table>

Displaying items 1 - 2 of 2
Managing the On-Line Exam Process

Using the Portal as a CIT

**Certificate**

A completion certificate is available for this test. The certificate is in an Adobe PDF format. Click on the image below to open in a popup window. You may need to disable any popup blockers to view. Once opened, you can save the certificate on your computer or print.

**Summary of Results By Section**

The questions in this test were organized by section. This table details a summary of your scores by section.

<table>
<thead>
<tr>
<th>Section/Subject Area</th>
<th>Questions Available</th>
<th>Points Scored</th>
<th>Percentage Scored</th>
<th>Pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIS A-610: Module 1 &amp; 2 CLOSED</td>
<td>15</td>
<td>15</td>
<td>100.0%</td>
<td>PASS</td>
</tr>
</tbody>
</table>
Note: The user will have to move the mouse cursor toward the bottom of the certificate screen in order to view the Print and Save Option.

5.6.5 EXAM COSTS
The cost for a single module/test is $10 per student. Retakes are also $10 per module/test. If all modules/tests are scheduled, the cost is $35.

5.6.6 PRODUCT CODES
- CQI-ONLINE-EXAM
  This product code is used when testing to all modules (list price $35/exam).
- CQI-ONLINE-EXAM-MOD
  This product code is used when ordering a la carte (list price $10/exam)

When a customer orders exams through our Customer Service dept. the order is entered as a dollar amount and not by the quantity of exams. It may be worth mentioning that if a customer ordered the full exam but later changed their mind and will now be scheduling a la carte the funds will decrement according to the exams (modules) scheduled. Therefore, the cost per exam will be $10.
6 Manage Report Entry/Paper Exam Courses

6.1 OVERVIEW
This chapter covers scheduling a course that uses paper exams from the training kit. (Scheduling a course using on-line exams is covered in the previous chapter.) Prior to scheduling a report-entry course, a training kit with the appropriate paper exams must be purchased through the IPC Customer Service Department over the telephone or via email.

6.2 SCHEDULING REPORT-ENTRY COURSES

To schedule a new Report-Entry Exam course:

1. Log in and click View/Edit Classes from the Main Menu to access the Class List. Click Enter New Class to display the Add Class screen.

2. Click Enter New Class to display the Add Class screen.
3 Select the **Program** from the drop down menu. Select CIS or CIT. (The program default is CIS for CITs.)

4 Select the **Course Name** from the drop down menu (e.g., A-610, J-STD-001, etc.).

5 Select the **Modules** for the class (check the box in front of the module).

   Note: When a course name is selected, the modules for that course display. By default, the mandatory modules are selected. The trainer may select all of the modules for the course by clicking the box to the left of Module Name, or select (deselect) any module by clicking on the corresponding box.

   Note: If all students are not taking the same class, a new class will need to be scheduled for the different selection of modules
6 Select the **Trainer’s Employer** - the company/employer the trainer is representing while teaching the classes that are being scheduled).

**Note:** The Trainer’s Employer will default to the employer used at log in. If this is not the same as the employer for the course, the trainer can scroll through the listing or click the column header for any of the parameters (Name, Address, City, State, Country) to sort the column alphanumerically. The trainer can also click the arrow (▼) to open a filter to sort the data in that column using specific search parameters.

Alternatively, click and drag the column header and drop it in the gray area above the list to sort detail information.
7 Select **Report Entry** for the Exam Type.

8 Enter **Start Date** - the date exams should be available to the students. (Use the drop down calendar.

Enter **End Date**. Schedule only modules that can be completed within the time specified. (Use the drop down calendar.)

9 Enter any **Comments** about the class.

   **Note:** Class comments are relayed directly to IPC certification staff after submission. If questions or comments arise during training, select the Contact the IPC Cert Team tab or send an email to certification@ipc.org.

10 Click **Add** when all of the information has been input in the required fields to schedule the class and save the information.

   Click **Cancel**. Closing the screen without clicking the Add button will clear everything entered into the fields and exit the Add Class screen.

### 6.3 Enrolling Students in a Report-Entry Course

The Portal allows the trainer or CQI Admin to enroll students who are already in the IPC database and/or already certified. The system accepts the student’s IPC ID#, or his/her previous certification number. If the student is new to the IPC database (no IPC ID number), then a form will be available for the CIT or CQI Admin to enter the information for that new student.

   **Note:** All students must have an email address to view records or to be able to login for testing. If the student does not have one, he/she can create one prior to class using Gmail, Yahoo, Hotmail, or any other free email provider.
To Enroll a Student:

1. Click View/Edit Class on the CIT landing page to access the Class List.
2. Click the Course Number (underlined) to access the View Class Detail screen.

3. Click Enroll Student (bottom left) to access the Enroll Student screen. Choose from the following options:
   - Enter the Student IPC ID#
   - Enter the student’s Last Name, Program, and Certificate #
   - Enter the student’s Last Name and First Name and click Search to search the database for the student’s record, if the student’s IPC ID# or Certificate # is not known.
Enrolling Students in a Report-Entry Course

Using the Portal as a CIT

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CQI User’s Guide

View Class Details

- Train: Tom QT
- Program: CIS
- Course: IPC-A-610

Modules:

- Module Name: MODULE 1
- Mandatory: Yes
- Module Name: MODULE 2
- Mandatory: Yes
- Module Name: MODULE 3
- Mandatory: No
- Module Name: MODULE 4
- Mandatory: No
- Module Name: MODULE 5
- Mandatory: No
- Module Name: MODULE 6
- Mandatory: No
- Module Name: MODULE 7
- Mandatory: No
- Module Name: MODULE 8
- Mandatory: No

Training Company/Employer:
- IPC’s Management, 1000 Laurel Drive, Suite 1000, It
- Start Date: 08/26/2013
- End Date: 09/27/2013
- Exam Type: Paper
- Random Order

Comments:

Enroll Student

Enroll Student

FAST ADD

Student IPC ID:

ADD

LAST NAME
- (Family Name/Surname)
- Program:
- Student’s Certificate:

FIND STUDENT

LAST NAME
- (Family Name/Surname)
- FIRST NAME

SEARCH
4 Click the full name of the student (underlined) to be enrolled. Verify the student name and contact information. (All students must have an email address to enroll.)

If the student cannot be found:

- Click a name in the list or return and modify the FIRST NAME by entering less characters and SEARCH again.
- Click **Add New Student** and enter the required information.
5 Click **ADD** to enroll the student in the class.
6.4 VIEWING CLASS DETAILS

To View Class Details:

1. Click View/Edit Classes on the CIT landing page to access the Class List screen.

2. Click Enter New Class to display the Add Class screen.

3. Click the Course number to View Class Details (available courses are underlined).
6.5 EDITING A CLASS

Once a class/exam is added to the system, a trainer or CQI Administrator can view, edit, or cancel an exam session. Classes may only be deleted if student grades have not been posted. Once a class is submitted, class information, and roster cannot be edited. Change requests must be sent to certification@ipc.org.

To Edit a Class:

1. Click View/Edit Classes on the CIT landing page to access the Class List screen.
2. Click on the course number to view class details (available courses are underlined).
3. Click Edit on the bottom left to access the Edit Class screen.

From this screen, change the mix of Modules that comprise the class, change the Start and/or End dates, change the Exam Type (online/paper), and add Comments.

Note: Modules can not be updated once students have been enrolled.
6.6 MANAGING THE REPORT-ENTRY EXAM PROCESS

During the process of scheduling a new class, the trainer selects the report-entry/paper exam option to be used for the certification class. For this option, paper replaces the current MS Word training reports and the trainer provides the students with the exams he/she received in the training kit. The trainer must be present at all time during the exam.

6.6.1 POST TEST RESULTS

When the exam has been graded, the trainer enters the grade for each exam online. When entering grades for paper exams, the trainer logs into the IPC Certification Portal. The trainer can view students that are awaiting grades from exam sessions conducted by that trainer. The grades are entered for each student and for each module.
Once a module is selected for the applicable student, the trainer can add the exam grading information:

- Exam Date – the date that the specific exam module was completed
- Exam Score – the percentage earned by the student for this exam module
To change a grade after it is enter, the trainer logs into the IPC Certification Portal. Once in this portal, the trainer selects the student needing the grade change. Select the student and re-enter the Exam Score. Click Save when enter the new grade.

6.6.2 **Review Test Results**

Once exams are completed, the trainer can view his/her students’ results in one location. Results are available for paper exams after the trainer enters the grades.

If a class finishes before the established end date, the CIT must edit the class and change the end date. **Submit to IPC** will not display before the end date.
6.6.3 **ISSUE CERTIFICATIONS**

Students who earn a certification through the paper exam process will receive their certificates from the trainer, who must manually enter the certification numbers.

If the trainer uses the exams provided through the CIT training kit, the trainer must contact customer service to purchase the certificates. The certification number (serial #) will be on the blank certificate. The CIT will need to issue a certificate to each student who passed the exam by printing the student’s name on the certificate (using the template file on the teaching CD) and signing the trainer’s name. Then, enter the scores and certificates numbers in the certification portal.
7 Using the Portal as a Certification Representative

7.1 OVERVIEW
This chapter describes the features of the IPC Certification Portal available to a Certification Representative (Cert Rep). Cert Reps may validate a certification view a summary of their company’s certifications. This information is site specific. Certification for other company locations may not be available.

7.2 LOG IN AS CERT REP
Follow the instructions in Chapter 3 to access the IPC Certification Portal and display the Home Page. Log in as a Cert Rep from the Home Page.

To Log In:
1. Click Log In (upper right corner).
2. Enter the Cert Rep User Name.
3. Enter the Cert Rep Password.
4. Click Log In (bottom left).
7.3 Cert Rep Landing Page

The Cert Rep landing page is almost the same as the CIT landing page (see Chapter 4). The difference is instead of a link to View/Edit Classes, the Cert Rep landing page has a link to Company Certification Summary.

7.3.1 Go To...

Click the Go to... tab to open a dropdown menu listing the same links as the bulleted items on the screen: Certification Validation, My Certification Summary, and View/Edit Classes.

7.3.2 IPC Training and Certification (Tab)

Click the IPC Training and Certification tab to go to the IPC.org Knowledge page for general information about IPC Certification Programs.

7.3.3 Take an Online Exam (Tab)

This tab is used to administer exams through the CQI system. Managing the exam process is covered in section 4.7 of this Guide.
7.3.4 **EMAIL THE IPC CERT TEAM (TAB)**

Click the **Contact the IPC Cert Team** tab to open an email and send a message directly to a member of the certification team.

7.4 **CERTIFICATION VALIDATION**

The IPC Certification Portal allows the Cert Rep to validate any active certification by entering the student’s name, certification number, and program. The instructions for validating a certification are given in Chapter 2. IPC Standard Certificate Validation provides information on the status, course name, expiration date of the certification and the name of the trainer and company responsible for the issuing the certificate.

7.5 **MY CERTIFICATION SUMMARY**

When logged in properly as a Cert Rep, use the My Certification Summary link to review the certification history. A summary will display listing all programs the user has completed, the expiration date and number of certifications, and the name of the trainer and company responsible for the issuing the certifications.

7.6 **COMPANY CERTIFICATION SUMMARY**

When logged in properly as a Cert Rep, click Company Certification Summary to access an internal listing of the certifications held by Cert Rep’s company personnel. The listing is organized by personnel last name, and includes all the programs completed the company’s personnel have completed, their expiration date, training company, location of the training, and name of the trainer.

Click Printer Friendly to open a new window with just the certification information that can be printed directly. Click Excel to open the certification information in an Excel spreadsheet. This option is useful for sorting if there are many programs and certificates.
Use the filters to narrow the search. Highlight or enter the desired filter(s) and click **Apply Filter** to run a revised search. Click **Clear Filter** to remove all filters and search the complete company certification listing.

Scroll through the listing or sort by any of the parameters (Name, Current Company, Course, etc.). Click the filter arrow ( ) located to the right of each column header to open a filter menu to sort the data in that column alphanumerically.
Alternatively, click and drag the column header and drop it in the gray area above the list to sort detail information.
8 Using the Portal as a CQI Program Administrator

8.1 OVERVIEW
This chapter describes the features of the IPC Certification Portal available to a CQI Administrator (CQI Admin). The CQI Admin may validate a certificate, view a summary of internal company certifications, schedule classes, and view a summary of external company certifications.

8.2 LOG IN AS CQI ADMIN REP
Follow the instructions in Chapter 1 to access the IPC Certification Portal and display the Home Page. Log in as a CQI Admin Rep from the Home Page.

To Log In:
1. Click Log In (upper right corner).
2. Enter the CQI Admin User Name.
3. Enter the CQI Admin Password.
4. Click Log In (bottom left).
8.3 CQI ADMIN LANDING PAGE

The CQI Admin landing page is similar to the CITMIT landing page (see Chapter 4). In addition, the CQI Admin may view internal company certifications by selecting the Company Certification Summary and certifications issued by the company trainers both internally and externally by selecting the Certification Administration IPC Summary.

8.3.1 GO TO… (TAB)
Click the Go to… tab to open a dropdown menu listing the same links as the bulleted items on the screen: Certification Validation or My Certification Summary

8.3.2 IPC TRAINING AND CERTIFICATION (TAB)
Click the IPC Training and Certification tab to go to the IPC.org Knowledge page.

8.3.3 TAKE AN ONLINE EXAM (TAB)
This tab is used to administer exams through the CQI system. Managing the exam process is covered in section 4.7 of this Guide.

Note: This tab is viewable to everyone, although it may only be accessed by MITs, CITs, and CISs.

8.3.4 E-MAIL THE IPC CERT TEAM
Click the Contact the IPC Cert Team tab to open an email and send a message directly to a member of the certification team.
8.4 CERTIFICATION VALIDATION

The IPC Certification Portal allows the CQI Admin to validate any active certification by entering the student’s name, certification number, and program. The IPC Certification Portal allows the CQI Admin to validate an active certification by entering the student’s name, program, and certification number. See Chapter 2 for detailed instructions.

8.5 MY CERTIFICATION SUMMARY

When logged in properly as a CQI Admin, click My Certification Summary link to review the user’s certification history. The user’s summary will display listing all programs the user has completed, the expiration date and number of certifications, and the name of the trainer and company responsible for the issuing the certifications.

Click Printer Friendly to open a new window with just the certification information that can be printed directly. Click Excel to open the certification information in an Excel spreadsheet. This option is useful for sorting if there are many programs and certificates.
Use the filters to narrow the search. Highlight or enter the desired filter(s) and click **Apply Filter** to run a revised search. Click **Clear Filter** to remove all filters and search the complete company certification listing.

Scroll through the listing or sort by any of the parameters (Name, Current Company, Course, etc.). Click the filter arrow (▼) located to the right of each column header to open a filter menu to sort the data in that column alphanumerically.
### 8.6 Certification Administration Summary

![Certification Portal]

The Certification Administration Summary section displays the certifications trained by an IPC portal user. It includes columns for Name, Program, Course, Certificate #, Expiration Date, Special Addition, Location, and Trainer. The portal is designed to help users manage and track their certifications effectively.

<table>
<thead>
<tr>
<th>Name</th>
<th>Program</th>
<th>Course</th>
<th>Certificate #</th>
<th>Expiration Date</th>
<th>Special Addition</th>
<th>Location</th>
<th>Trainer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abe, Delia</td>
<td>CIT</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Apr 2015</td>
<td></td>
<td>Boston, MA</td>
<td>Mike Johnson</td>
</tr>
<tr>
<td>Barnish, Lucy</td>
<td>CIT</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Aug 2015</td>
<td></td>
<td>Barrocks, IL</td>
<td>Jack Crawford</td>
</tr>
<tr>
<td>Breckenhauer, Jennifer</td>
<td>CIT</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Jan 2016</td>
<td></td>
<td>Barrocks, IL</td>
<td>Jack Crawford</td>
</tr>
<tr>
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<td>CIT</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Jan 2016</td>
<td></td>
<td>Barrocks, IL</td>
<td>Jack Crawford</td>
</tr>
<tr>
<td>CCR, Tom</td>
<td>CTS</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Aug 2015</td>
<td></td>
<td>Barrocks, IL</td>
<td>Jack Crawford</td>
</tr>
<tr>
<td>CIT, Tom</td>
<td>CTS</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Aug 2015</td>
<td></td>
<td>Barrocks, IL</td>
<td>Kris Robinson</td>
</tr>
<tr>
<td>Crawford, Jack</td>
<td>CIT</td>
<td>IPC-3-STD-001</td>
<td>J600050050</td>
<td>Jun 2015</td>
<td></td>
<td>Barrocks, IL</td>
<td>Kris Robertson</td>
</tr>
<tr>
<td>Day, Jennifer</td>
<td>CTS</td>
<td>IPC-A-610</td>
<td>J600050050</td>
<td>Feb 2020</td>
<td></td>
<td>Huntsville, AL</td>
<td>Jack Crawford</td>
</tr>
<tr>
<td>Durs, Mark A.</td>
<td>CIT</td>
<td>IPC-3-STD-001</td>
<td>J600050050</td>
<td>Jun 2015</td>
<td></td>
<td>Barrocks, IL</td>
<td>Robert Jackson</td>
</tr>
<tr>
<td>Duric, Mark A.</td>
<td>CIT</td>
<td>IPC-3-STD-001</td>
<td>J600050050</td>
<td>Jun 2015</td>
<td></td>
<td>Barrocks, IL</td>
<td>Robert Jackson</td>
</tr>
</tbody>
</table>
Frequently Asked Questions

How can I get more information or help?

To get help quickly, contact certification@ipc.org.

I don't see my certification details in My Summary.

E-mail the IPC Cert team a copy of your certificate certification@ipc.org or contact your trainer and request that they submit your training report.

My Summary has the incorrect certification number and/or expiration date.

Email the IPC Cert team (certification@ipc.org) a copy of your certificate.

I don't want to receive a lot of emails at work or at my personal email address. That is why I haven’t provided my email.

IPC does not sell or distribute emails. If a user does not want to receive emails from IPC they may opt out by visiting the Communication Preferences under View IPC Profile.

Can I use my email address for my students?

No. An email address may only be used by a single user.

How do I export certification summaries?

Click on the MSExcel icon in the top right hand corner of the summary.

Can a CIS request an extension through the portal?

No. To ensure that extensions are granted within company guidelines, CIS must request an extension from their trainer or any currently certified CIT/MIT in the same program. See below as shown in the 3.4 of the Professional Training and Certification Policy (.pdf). Trainers should use the CIS Extension Form.

Certified IPC Trainers are authorized to grant, at their discretion and in accordance with ISO or other certification guidelines and restrictions that may be in place at a company, a single extension of up to ninety (90) days to Certified IPC Specialist.