eDocuments Third Party User Guide

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Introduction

This guide will demonstration how to carry out the essential functions of the University of Oxford eDocuments Service.

Getting Started

Registration

1. Open the portal by going to https://verify.edocuments.ox.ac.uk/
2. Select Register

Login Details

3. Enter your email address
4. Create a password
5. Select Next

Personal Details

6. Enter your:
    a. First Name
    b. Last Name
7. Select Register
8. You will receive a confirmation email, you will need to follow the link in this email to confirm your email address

Logging in

1. Enter the email address you registered with
2. Enter the password you registered with

You may change both your email address and password from within your Profile.

If you become locked out of the system, you can wait for the system to automatically unlock, or contact eDocuments Support.

Forgotten Password

If you have forgotten your password:

1. Select the Forgotten Password link below the Log in button
2. Enter your email address
3. Select Reset Password

You will be sent a link to reset your password.

4. Open your email
5. Click on the link or copy and paste into your browser
6. Enter a new password
7. Confirm the password by entering it again
8. Select Reset Password

Profile

You can manage your personal details within the system.

Personal Details

You may change any of the details listed.

1. Select the field you wish to change
2. Enter the new information
3. Select Save

Additional Contact Information

You may add, additional phone numbers, additional email addresses and social media.

1. Select the additional information you wish to add from the tabbed list
2. Select an option from the dropdown menu
3. Enter the appropriate information
4. Select Add

Addresses

Add addresses and set default billing address.

1. Select Add
2. Enter details as required
3. Use the toggle to set either a Billing Address
4. Select Save

Change Password

1. Enter current password
2. Enter new password
3. Re-enter new password to confirm
4. Select Save

Orders

Orders displays a list of all purchases made via the store. You can view additional information about each order, by selecting the **Details** icon.

Connections

Allows you manage your interactions with students.

Adding Connections

1. Select Add Connection
2. Enter the recipient name and email address
3. Select Send

Once the student accepts the connection, and you have paid (if necessary) the status will change from Pending to Active.

Payment

1. Select the Pay icon from the Actions menu of the person you wish to see

   You will automatically be taken to the Store Basket.

2. Select Checkout, or select the basket icon next to your profile, then select Checkout
3. You can add new Billing address, or use the default address in your profile
4. Select Pay

   You are now taken through to the Payment system.

5. Check the items and if correct, select Continue
6. Enter your contact details as prompted and select Continue
7. Enter your payment details as prompted and select Continue
8. Review the information you have entered and when ready, select Confirm
9. Select Continue Shopping to return to your Dashboard

Extending the timeframe

Change the time limit you have to view documents.

1. Select the Extend Connection icon under Actions
2. Select the Extend Date field
3. Use the calendar to prolong the date or bring the date forward
4. Select Save

Once the student has accepted the extension, the date will change.

Cancelling Connections

1. Select the Cancel icon under Actions
2. When asked if you would like to delete this record, select Yes

The record is no longer in the list of Active Connections.

Reactivating Connections

1. Select Inactive
2. Select the Reactivate Connection icon
3. Enter an expiry date for the connection
4. Select Reactivate

If the student accepts the connection, the status will change from Pending to Active.

Accessing Documents via Connections

Once a connection has been made, you can access documents from Connections.

To View Documents

1. Select the View icon from the Actions menu of the person whose documents you wish to see
2. Select View
3. Use the arrows to move between documents

To Print or Save Documents

1. Select the View icon from the Actions menu of the person whose documents you wish to see
2. Select View
3. Select the DocViewer menu
4. Select Print File or Save File

Reporting Issues

If there is an issue with a document, you can report it.

1. Select the View icon from the Actions menu of the person whose documents you wish to see
2. Select Report
3. Select an Issue Reason from the drop down list
4. Provide a more detailed description of the issue in the field
5. Select Send