



## **Unipass Identity - Control Centre**

### User Guide v1.5

This document outlines the duties of Unipass Controllers within the Control Centre section of the Unipass website.

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# 1. Overview

The following User Guide describes the functionality contained within the Control Centre section of the Unipass website:

<http://www.unipass.co.uk>

The Control Centre may **only** be accessed and used by authorised Unipass Controllers.

As a controller you are the **gatekeeper** for your organisation's Unipass Identity users and further to the individual Guidelines and Terms and Conditions that users agree and adhere to, you have a **duty of care** to ensure that the organisations account is administered and reviewed regularly.

The facilities available to Unipass controllers within the Unipass Control Centre are as follows:

- **Approve/reject Unipass Identity applications**
- **Control email domains for the organisation**
- **Maintain and administer the organisations Unipass account**
- **Close accounts of individuals**

**Note:** The ability to revoke, re-issue and re-activate Unipass certificates can only be carried out by the individual user by logging into the 'My Account' section on the Unipass Website.

## 2. Controller Responsibilities

As a Unipass Controller your duties and responsibilities are as follows:

### New Applications

To ensure that all new applications contain the correct information for the individual applying;

- i. Address confirmation - Check that any branch postcode supplied is valid for both the applicant and your Organisation.
- ii. Personal information - The applicant is an Individual within your Organisation and has a legitimate requirement to hold a Certificate on behalf of your Organisation.
- iii. Third-party confirmation - Check that the applicant has chosen the correct Role, i.e. Approved Person, Business Support, IT Support.

If the applicant is an App roved Person, they must be registered to practice on the Financial Services Authority and that appropriate steps have been taken to check that the Individual is a legitimate member of your Organisation.

### Certificate Revocation

To promptly request the revocation of a Certificate for an Individual when;

- i. They leave the organisation;
- ii. It is known or is suspected to be inaccurate or could reasonably be believed to have been compromised;
- iii. If there has been a loss, theft, modification or compromise of any security information;

- iv. If there is a change in the identity of your Organisation.

To **regularly** review and maintain records of the individuals Unipass accounts to ensure they are accurate and up to date.

### Ceasing to be a Unipass Controller

To immediately notify the Customer Services Team if you cease to act as a Unipass Controller (by sending an email to [helpdesk@unipass.co.uk](mailto:helpdesk@unipass.co.uk) or by calling 0131 385 8888) and advise them of the identity of any replacement Unipass Controller and the date from which the replacement is to take effect.

For full information about the roles and responsibilities of being a Unipass Controller, please refer to the 'Guidelines' document within the '[Resources](#)' section of the Unipass website.

## 3. Unipass Identity Control Centre

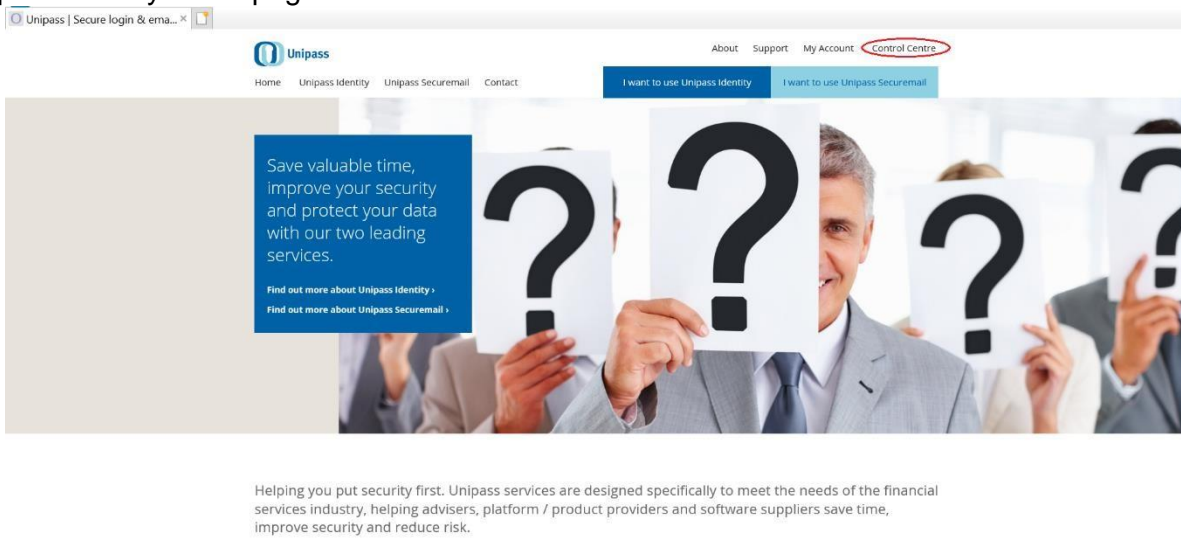
### Accessing the Unipass Control Centre

As a Unipass controller you will be able to view and track the progress of all Unipass Identity applications submitted by members of staff within your organisation.

You will also be able to view the individual details of all members of staff, within your organisation, who have a live Unipass Identity (e.g. name, email address, individual role, contact details etc...).

In order to access the Control Centre you **must** have an authorised Unipass Identity and be designated as a Unipass controller within your organisation.

The Unipass Identity Control Centre is accessed by clicking on the 'Control Centre' tab on the Unipass Identity home page:

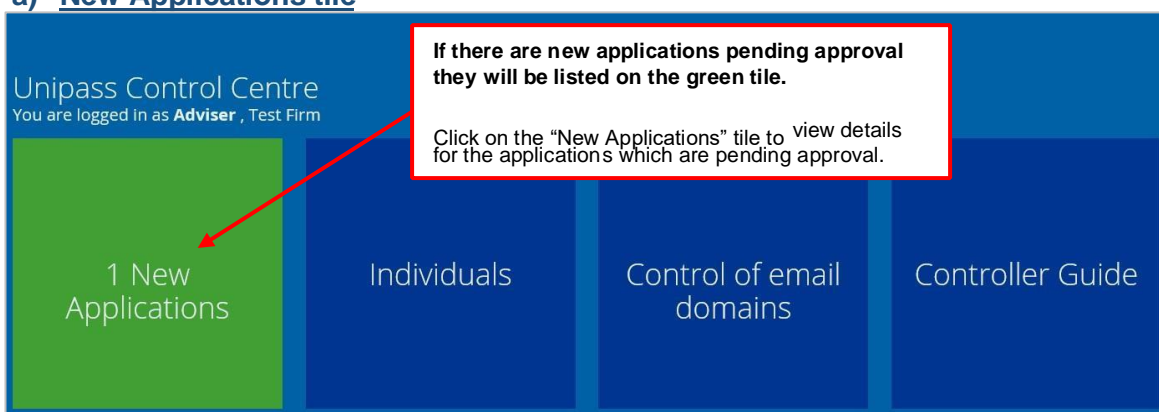


### Control Centre Functionality

On entering the Control Centre the following tiles will be displayed:



#### a) New Applications tile



As a Unipass Controller you will be required to approve or reject applications for a Unipass Identity submitted from individuals within your organisation.

When an individual applies for a Unipass Identity they must select a Unipass controller from within their organisation to approve their application.

The 'Applications' table (as shown below) displays a list of all Unipass Identity applications that have been received from individuals within your organisation and that are awaiting your approval.

**Note:** If there is more than one Unipass controller within your organisation, then each controller will have access to view new applications submitted within your organisation by clicking on the 'Show all applications' button.

#### Approving a Unipass Identity application:

There are 2 ways to **approve** an application.

- From the initial application screen, click on the green tick to approve the individual or;
- From the full details screen of the application click on the 'Approve' button displayed at the bottom of the screen.

**Unipass Control Centre**  
 You are logged in as **Adviser**, Test Firm  
[Click here to access the Control Centre user guide](#)

**Applications**  
 The following Unipass Identity applications have been submitted and are awaiting approval.  
 Click on an individual to see more information about their application.  
 Please note: Your response will be actioned immediately. You will not be asked to confirm your response and the application will no longer show in this table.

Name	Email Address	Postcode	Individual Role	Controller
Test Adviser Test Adviser	testadviser@outlook.com	EH14 4AP	Business Support	Test Adviser Test

Back < Show my applications >

**In order to view more details about each individual, click on their appropriate entry in the 'Applications' table.**  
 This will open the 'Application Details' screen (see below) and will show some additional information that was submitted by the individual as part of their Unipass Identity application.

You can **'Approve'** applications from this screen by clicking the green tick or **'Reject'** the application by clicking the black cross.

Approving an application will automatically generate an email to the individual advising them that their certificate is now ready for collection.

**Note:** Applications made under organisation types 'Non-UK', 'Trustee' and 'Other' are not permitted to hold Unipass Identity certificates, hence, no email will be generated.

All approved applications will then be removed from the list and displayed in the 'Individuals' table.

**Rejecting a Unipass Identity application:**

There are 2 ways to **reject** an application.

- From the initial application screen, click on the black cross to 'Reject' the individual. Or,
- From the full details screen of the application click on the 'Reject' button displayed at the bottom of the screen

*Rejected applications will not be visible within the Individuals table.*

Application Details screen:

Unipass Control Centre  
 You are logged in as **Adviser** , Test Firm

[Click here to access the Control Centre user guide](#)

### Application

<b>Name</b>	Test Adviser Test Adviser
<b>Primary Email</b>	testadviser@outlook.com
<b>Alternative email</b>	adviser@outlook.com
<b>Landline</b>	013131313
<b>Postcode</b>	EH14 4AP
<b>Individual role</b>	Business Support

Controllers will also be able to **'Approve'** or **'Reject'** Unipass Identity applications from 'Application Details' page by clicking either of these boxes.

Reject
Approve

Back

## b) Individuals tile

Unipass Control Centre  
 You are logged in as **Adviser** , Test Firm

1 New Applications

Individuals

Control of email domains

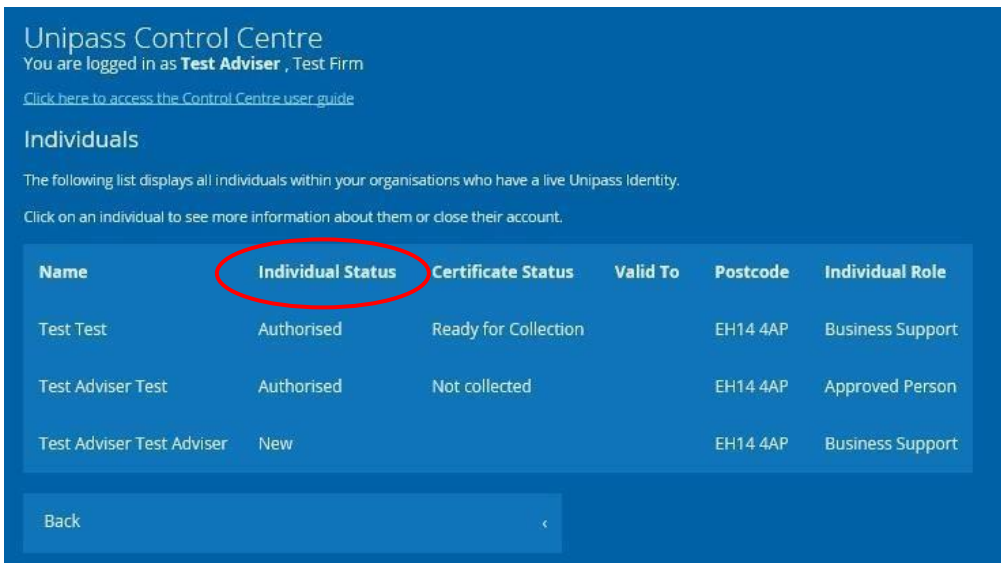
Controller Guide

By clicking the Individual section you are able to view the status of individuals in your organisation and close (remove) their Unipass Identity.

The 'Individuals' table (see below) displays a list of everyone within your organisation who has a Unipass Identity and their certificate information. This list does not include cancelled individuals.

An individual can have a status of:

<b>Authorised</b>	Someone who has been approved by the Unipass Controller.
<b>Pending</b>	Someone whose application has been submitted and is awaiting vetting (approved person's applications only).
<b>New</b>	A fresh application which has been sent to the controller for approval.



A certificate can have the status of:

<b>Ready for Collection</b>	An individual approved by the controller has been issued a certificate but has not yet collected it.
<b>Collected</b>	An individual approved by the controller has been issued a certificate and successfully collected it.
<b>Not Collected</b>	An individual approved by the controller who had been issued a certificate but did not collect it within the 24 day period the certificate was available for collection.
<b>Expired</b>	An individual approved by the controller who had an active certificate but has let it lapse.

From the individuals screen the Unipass controller can also view the date the certificate is valid to, the postcode to which the certificate is registered to and also the role which the individual has applied under.



## Unipass Control Centre

You are logged in as **Test Adviser**, Test Firm

[Click here to access the Control Centre user guide](#)

### Individuals

The following list displays all individuals within your organisations who have a live Unipass Identity.

Click on an individual to see more information about them or close their account.

Name	Individual Status	Certificate Status	Valid To	Postcode	Individual Role
Test Test	Authorised	Ready for Collection		EH14 4AP	Business Support
Test Adviser Test	Authorised	Not collected		EH14 4AP	Approved Person
Test Adviser Test Adviser	New			EH14 4AP	Business Support

Back <

If a controller wants to view more details about each individual, or to close (remove) someone's Unipass Identity account, double click on the appropriate entry in the 'Individuals' table.

This will open the 'Individual Details' screen which will provide additional information submitted by the individual as part of their Unipass Identity application.

Unipass Control Centre  
 You are logged in as **Amanda** , Identity Test Firm  
[Click here to access the Control Centre user guide](#)

### Individual

<b>Name</b>	Amanda Test
<b>Primary Email</b>	clovatt598759@unipass.co.uk
<b>Landline</b>	123123123
<b>Postcode</b>	ML6 6BF
<b>Individual role</b>	Business Support

Outstanding applications will be assigned to Tommy Identitytester

Back < **Close account** >

To **Close** (remove) a Unipass Identity; click on the 'Close account' button displayed at the bottom of the 'Individual Details' screen.

**c) Control of Email Domain tile**

Unipass Control Centre  
 You are logged in as **Adviser** , Test Firm

1 New Applications

Individuals

Control of email domains

Controller Guide

The “Control of email domains” tile provides you with a list of email domains which can be used when applying for a Unipass Identity within your organisation (see table below).

Unipass Control Centre  
 You are logged in as **John**, ORIGO SECURE INTERNET SERVICES  
[Click here to access the Control Centre user guide](#)

### Control of Email Domains

The following list displays all email domains that are currently in use within your organisation. Any future Unipass Identity application submitted under your organisation must use (depending on policy set) an email address that contains one of the listed domains.

You can see the details of all the individuals and associated email addresses that currently use this domain by clicking on a particular domain.

In order to remove a domain, click on the cross next to the domain name that you want to remove.

**Please note:** You will not be able to remove a domain if it is still in use. Each individual using the email domain will need to be contacted and asked to log into 'My Account' in order to update their email address before you will be able to remove the domain

**Email Domains**

test.com	All email addresses	✕
unipass.co.uk	All email addresses	✕

Add new email domain

New Email Domain \*

Email domain control should be applied to

All email addresses

Back      Add domain

If a domain is not on the list this function allows you to **add a new email domain** (the domain being all information *after* the '@' symbol). Fill in the 'Add new email domain' field and by clicking on the drop down box choose if it is suitable to use for Primary, Alternative or both email addresses, then click on 'Add domain' to update the list.

By clicking on a particular domain, you can see the full email address of all the individuals associated with that domain.

Unipass Control Centre  
 You are logged in as **Adviser**, Test Firm  
[Click here to access the Control Centre user guide](#)

### Email Addresses Related To Domain

The following list displays all individuals within your organisations who have a common email domain.

Email	Forename	Surname
adviser@outlook.com	Test Adviser	Test Adviser
origotest@outlook.com	Origo	Test
tadviser01@outlook.com	Adviser	Test
testadviser@outlook.com	Test Adviser	Test Adviser
testadviser@outlook.com	Test Adviser	Test

Back

To remove an email domain which is not in use; click on the cross next to the domain you want to remove.

**Note:** You will not be able to remove a domain if it is still in use. If you wish to remove a domain that is still in use you will need to contact each individual in your organisation who is using the email domain and ask them to log into **'My Account'** in order to update their email address before you will be able to remove that domain.

## Controller Guide



The 'Unipass Controller Guide' tile will take you to a web page providing a link to a readonly pdf version of the 'Unipass Controller Guide'. The 'Unipass Controllers Guide' outlines the role of a Unipass Controller and provides a summary of the functionality that is contained with the Control Centre.

## 4. Document Revision

<b>Revision</b>	<b>Date</b>	<b>Author</b>	<b>Amendments</b>
1.0	01/08/2014	UIdP Project Team	Approved version for go live of UIdP service
1.1	28/06/2015	Unipass Helpdesk	Added 'Control of Email Domain' section for Q2 maintainance release
1.2	May 2016	Unipass Helpdesk	Updated the Data Classification disclaimer
1.3	December 2016	Unipass Helpdesk	Review and update of whole document
1.4	March 2018	UIdP Project Team	Addition of screenshot of new home page
1.5	April 2021	Customer Services Team	Updated Customer Service Phone number