



Halo Solutions User Guide

Accreditation

Table of Contents

- Setting up the accreditation module
- Starting an accreditation for a user
- Set up an accreditation where you upload documents
- Set up accreditation where the user uploads documents
- Approving accreditation documents submitted by a user
- Adding an accredited user to an event
- Creating a pass
- Enabling 3rd parties
- Editing 3rd Party details and permissions
- Booking a user onto an event in the App

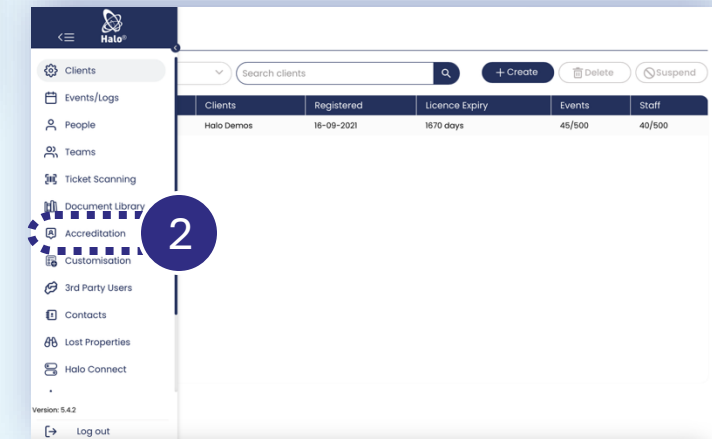


Setting up the accreditation module

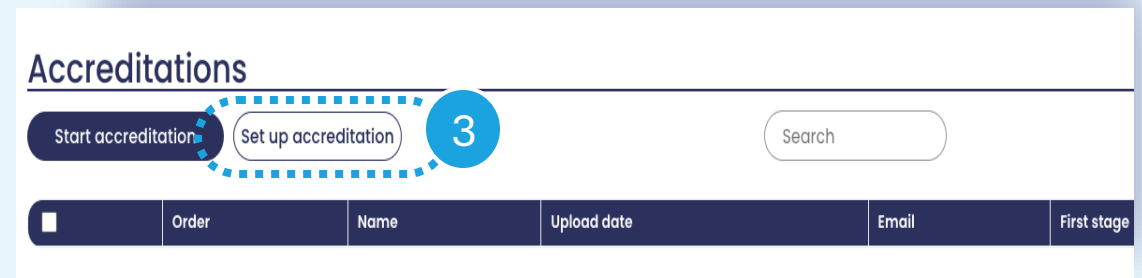
1. Log in to the Halo hub as an administrator



2. Select accreditation from the left-hand menu

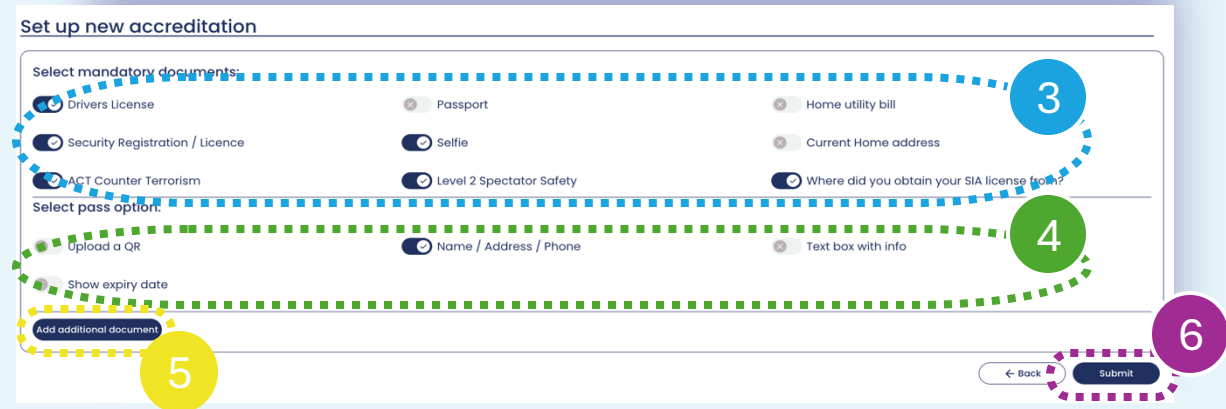


3. Select Set up Accreditation



Setting up the accreditation module

3. You have a choice of which mandatory documents to request. Select all those that apply for the type of accreditation you are setting up
4. Select which information you wish to display on the team member's pass
5. If you want additional documents to be submitted, select 'add additional documents and input details'
6. Click on submit



The screenshot shows the 'Set up new accreditation' form. It is divided into two main sections: 'Select mandatory documents' and 'Select pass option'. The 'Select mandatory documents' section has three columns of checkboxes. The first column includes 'Drivers License', 'Security Registration / Licence', and 'ACT Counter Terrorism'. The second column includes 'Passport', 'Selfie', and 'Level 2 Spectator Safety'. The third column includes 'Home utility bill', 'Current Home address', and 'Where did you obtain your SIA license from?'. The 'Select pass option' section has three options: 'Upload a QR', 'Name / Address / Phone', and 'Text box with info'. Below this is a 'Show expiry date' checkbox and an 'Add additional document' button. At the bottom right are 'Back' and 'Submit' buttons. Numbered callouts are placed over the form: 3 is over the 'Select mandatory documents' section, 4 is over the 'Select pass option' section, 5 is over the 'Add additional document' button, and 6 is over the 'Submit' button.

Set up new accreditation

Select mandatory documents:

- ☒ Drivers License
- ☒ Security Registration / Licence
- ☒ ACT Counter Terrorism
- ☒ Passport
- ☒ Selfie
- ☒ Level 2 Spectator Safety
- ☒ Home utility bill
- ☒ Current Home address
- ☒ Where did you obtain your SIA license from?

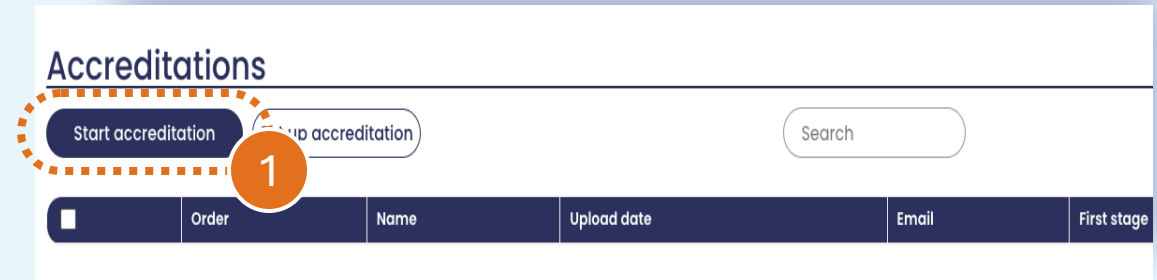
Select pass option:

- ☒ Upload a QR
- ☒ Name / Address / Phone
- ☒ Text box with info

☐ Show expiry date

Starting an accreditation for a user

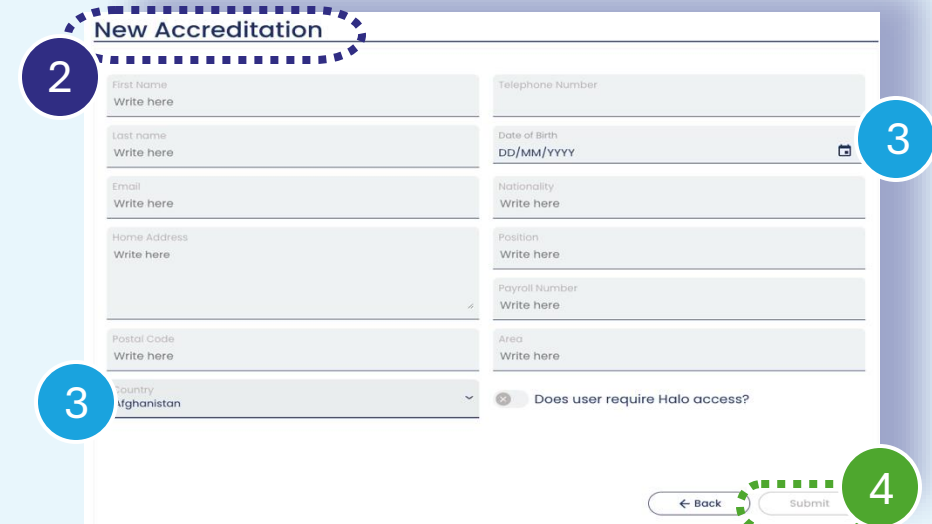
1. Click on Start Accreditation
2. In the new accreditation screen complete the details of the individual you wish to accredit
3. Use the drop-down menus for country and date of birth
4. When you are happy the details you have entered are correct, click on submit



Accreditations

Start accreditation Stop accreditation Search

	Order	Name	Upload date	Email	First stage
--	-------	------	-------------	-------	-------------



New Accreditation

2

First Name
Write here

Last name
Write here

Email
Write here

Home Address
Write here

Postal Code
Write here

Country
Afghanistan

Telephone Number

Date of Birth
DD/MM/YYYY

Nationality
Write here

Position
Write here

Payroll Number
Write here

Area
Write here

3

3

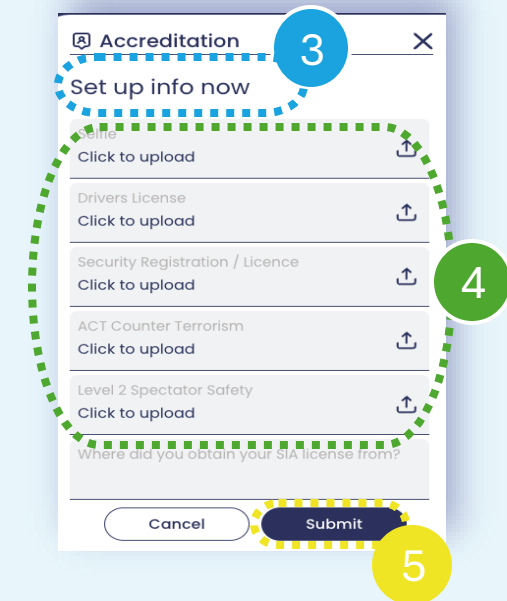
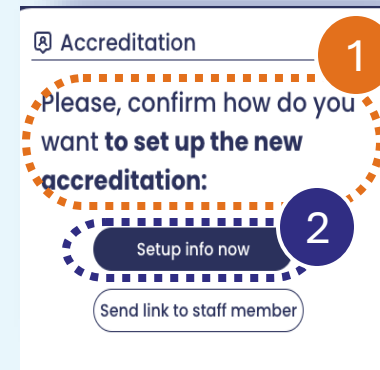
Does user require Halo access?

4

← Back Submit

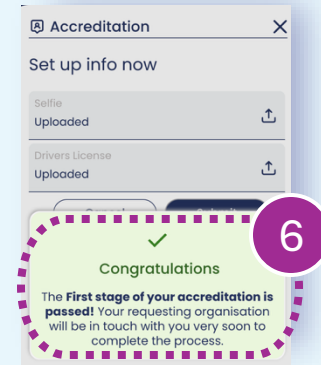
Set up an accreditation where you upload documents

1. You have two options for setting up an accreditation
2. If you have the required documentation, select Set up Info now
3. A list of all the accreditation documentation you have specified will appear
4. Upload each document in turn
5. When all documents are uploaded, click on submit

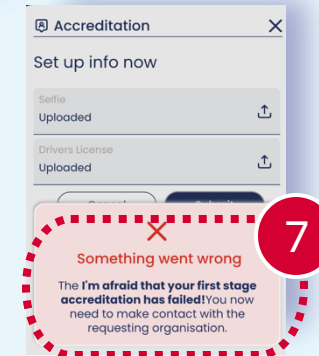


Set up an accreditation where you upload documents

6. You will see a pop up stating the first stage of the accreditation has passed.



7. You may see a pop up stating the first stage of accreditation has failed. This is related to image uploads



Set up an accreditation where you upload documents

8. If the something went wrong pop up appears, click on the name of the failed accreditation

Accreditations

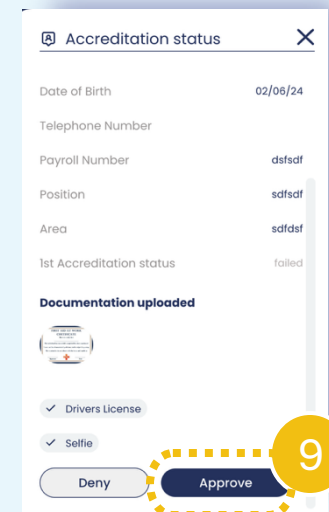
Start accreditation

Set up

	Order	Name	First stage	Status	Details
<input type="checkbox"/>	1	Charlie Archer	⊗	Approved	...
<input type="checkbox"/>	2	James Spencer	⊗	Failed	...
			⊗	Approved	...
			☑	Pending	...
			⊗	Failed	...

8

9. Verify all the details are correct and click on approve



Accreditation status

Date of Birth02/06/24

Telephone Number

Payroll Numberdsfsdf

Positionsdfsdf

Areasdfsdf

1st Accreditation statusfailed

Documentation uploaded

Drivers License

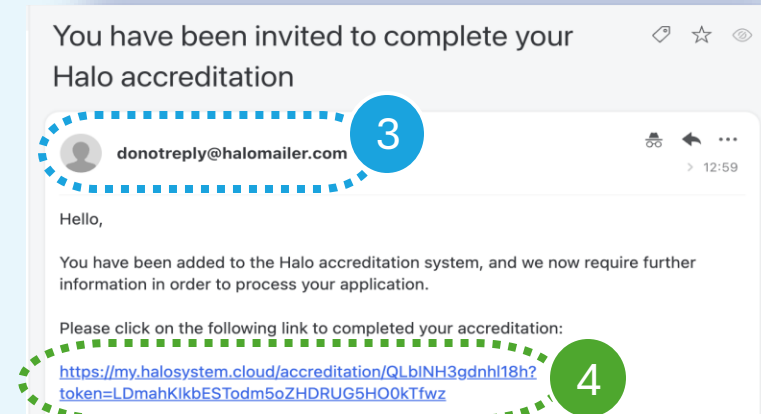
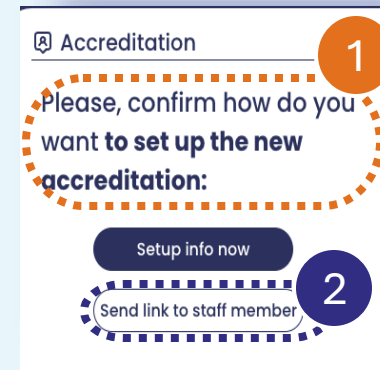
Selfie

Deny

Approve

Set up accreditation where the user uploads documents

1. You have two options for setting up an accreditation
2. If you want the individual to upload their documentation directly, select send link to staff member
3. The individual will receive an email from **halomailer**
4. The individual clicks on the link in the email

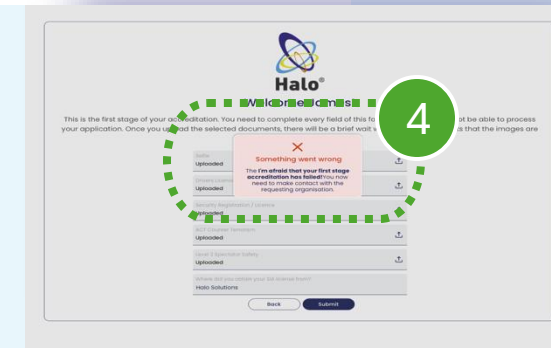


Set up accreditation where the user uploads documents

1. The user is taken to a welcome page
2. The user uploads the relevant documentation for each required field
3. The user clicks on submit
4. The user will see a pop up stating the accreditation has failed. This is because each individual needs to be approved manually. Your users can ignore this message



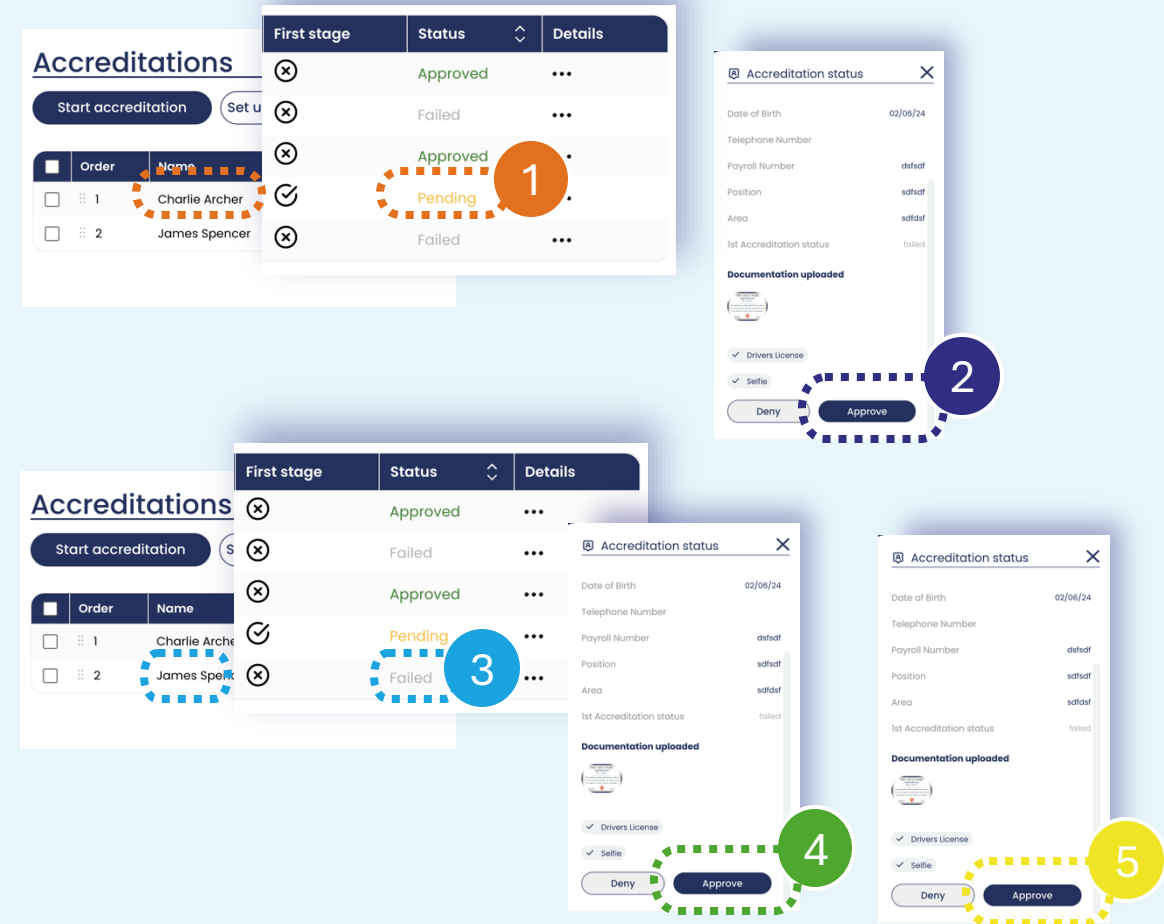
The screenshot shows the Halo accreditation form. Step 1 is the welcome message: "Welcome James! This is the first stage of your accreditation. You need to complete every field of this form, otherwise we will not be able to process your application. Once you upload the selected documents, there will be a brief wait while our system checks that the images are all of the same person." Step 2 is the document upload section, which includes fields for "Name", "Drivers License", "Security Registration / Licence", "ACT Counter Terrorism", and "Level 2 Spectator Safety". Each field has a "Click to upload" button. Step 3 is the "Submit" button. A dashed blue line connects the steps.



The screenshot shows the Halo accreditation form with an error message. Step 4 is a red box with a white 'X' icon and the text: "Something went wrong. You've advised that your first stage accreditation has failed. You need to make contact with the issuing organisation." The form fields and "Submit" button are visible below the error message. A dashed green line connects the steps.

Approving accreditation documents submitted by a user

1. To verify a pending accreditation, navigate to the accreditations tab and click on the name of a user marked as pending
2. Review details and click on approve
3. To verify a failed accreditation, click on the name of a user marked as failed
4. Verify details are correct and click on approve
5. If details are incorrect, click on deny and re-send link to individual to upload documents



The screenshots illustrate the following steps:

- Step 1:** In the 'Accreditations' table, a user named 'Charlie Archer' is marked as 'Pending'. This entry is highlighted with a red dashed box and a red circle with the number 1.
- Step 2:** The 'Accreditation status' modal for Charlie Archer is shown. The 'Approve' button is highlighted with a red dashed box and a red circle with the number 2.
- Step 3:** In the 'Accreditations' table, a user named 'James Spencer' is marked as 'Failed'. This entry is highlighted with a blue dashed box and a blue circle with the number 3.
- Step 4:** The 'Accreditation status' modal for James Spencer is shown. The 'Approve' button is highlighted with a green dashed box and a green circle with the number 4.
- Step 5:** The 'Accreditation status' modal for James Spencer is shown. The 'Deny' button is highlighted with a yellow dashed box and a yellow circle with the number 5.

Adding an accredited user to an event

1. Select event/ Logs from the left-hand menu
2. Select the event you want to add a user to
3. On the next screen, check the users you want to mark as accredited
4. Click on the right arrow icon to move them across to the accredited list



The screenshots illustrate the process of adding an accredited user to an event in the Halo app. The first screenshot shows the left-hand menu with 'Events/Logs' selected (indicated by a red dashed box and a red circle with the number 1). The second screenshot shows the 'London Bridge Station Demo' event page with the 'People' tab selected (indicated by a red circle with the number 2). The third screenshot shows the 'People' tab with a list of users and a right arrow icon (indicated by a red circle with the number 4) used to move users to the 'Accredited' list.

London Bridge Station Demo

Details Location Documents Zones Tasks Patrol People

Search people

Accredited

People assigned to event

People

Order Person Role

1 Charlie Head Steward

2 James Security Steward

4

Creating a pass



1. In the accreditations screen, select the individual you want to create a pass for

Accreditations

Start accreditation Set up accreditation Search Halo Demos - Network filter Sort by Export CSV

	Order	Name	Load date	Email	First stage	Status	Details
<input type="checkbox"/>	1	Charlie Archer	28/05/24	8eigxkyfngpkvgw@prod.halomailer.net	⊗	Approved	...
<input type="checkbox"/>	2	James Spencer	28/05/24	james@halosolutions.com	⊗	Approved	...

2. In the accreditation status screen, select create pass

Accreditation status

Last updated: 28/05/24 - 01:01

First Name: Charlie

Last Name: Archer

Country: United Kingdom

Date of Birth: 23/11/99

Telephone Number: 000000000000

Payroll Number: 1234-Payme

Position: Head Steward

Area: Stewarding

1st Accreditation status: approved

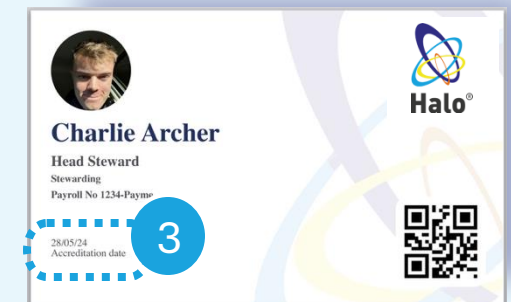
Documentation uploaded

☒ Drivers License

☒ Settle

Create pass

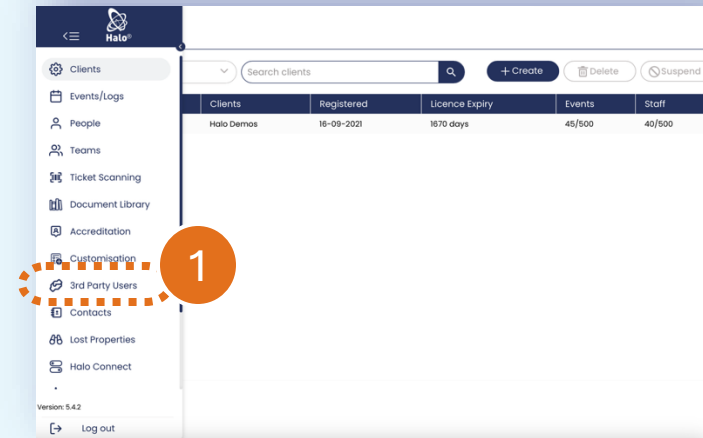
3. A pass will be generated ready for printing



[Back to menu](#)

Enabling 3rd parties

1. In the left-hand menu, select 3rd Party Users

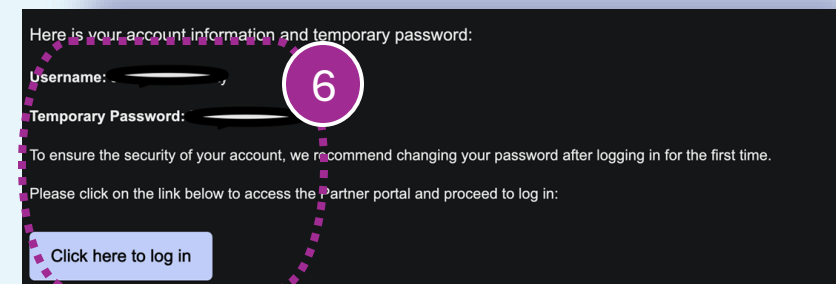


2. To add a new 3rd Party User click Create



Enabling 3rd parties

3. Complete the details for the 3rd party you want to add to the system
4. Use the toggle button to give your 3rd Party user the permissions to add users
5. When complete, click save
6. Your 3rd party user will receive an email with a username and temporary password for them to logon



Here is your account information and temporary password:

Username: [redacted]

Temporary Password: [redacted]

To ensure the security of your account, we recommend changing your password after logging in for the first time.

Please click on the link below to access the Partner portal and proceed to log in:

[Click here to log in](#)

Editing 3rd party user details

1. To edit a 3rd party user's details, navigate to the 3rd party list and select the user you would like to edit
2. You can suspend a 3rd party from the system
3. Update or edit details in the relevant fields
4. Remove the 3rd party's rights to add users
5. Click save to retain changes

3rd Party

Search Username

<input type="checkbox"/>	Order	Username	Company name	Contact No.	Events	Active?	Options
<input type="checkbox"/>	1	James.ThirdParty	James Security Services	440000000000	London Bridge Station Demo Manchester Piccadilly Demo	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	2	Charlie.ThirdParty	Charlie Security Partners	447472512125	London Bridge Station Demo Manchester Piccadilly Demo	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Details Events People Accreditation

☒ Suspend

Username: James.ThirdParty Phone: +44 0000 000000

Company Name: James Security Services Email: james@halosolutions.com

Password: ***** Event Limit: 50

Licence Expiry: 31 December 2024 No of accounts they can create: 50

☒ Show expiry date on Card ID ☒ 3rd party can create user

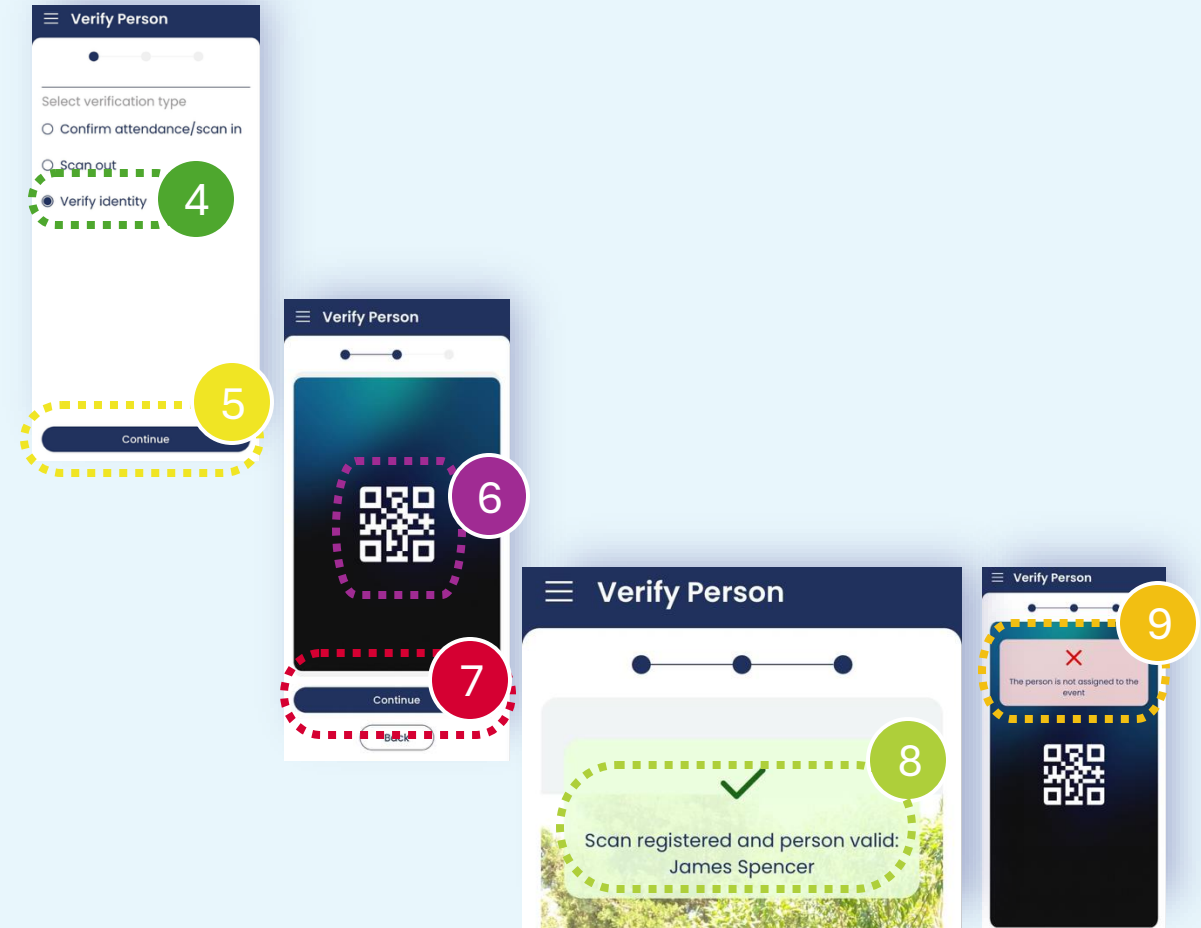
Verifying an accredited user in the App

1. Login to the app
2. Select Verify Person from the menu
3. Select the event you want to book the user in to



Verifying an accredited user in the App

4. Select Verify Identity
5. Select Continue
6. Scan the QR code from the individual's badge
7. Select Continue
8. If the person is registered to the event, you will receive a notification that the person has been validated
9. If the person is not registered to the event, you will receive a notification that they are not registered





Halo Solutions User Guide

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