



IAF CertSearch User Guide

For Accreditation Bodies - v.1

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Getting Started

Overview

This documentation will help you get started with IAF CertSearch. Once you have activated your account, we will show you how to upload and manage your data. We will provide you with a step-by-step guide to assist you.

Learn about the IAF CertSearch Data Structure

- [Templates](#)
- [Certification Fields Glossary](#)
- [Certification Fields Glossary](#)

Data Management

- [Certification Body Templates](#)
- [Certified Entities](#)
- [Import Certification Bodies](#)
- [Import Certifications](#)

Settings

- [Accounts](#)
- [Accreditation Body Profile](#)
- [Users](#)
- [User Settings](#)
- [Security Settings](#)
- [Notification Setting](#)

Activation

① Prerequisite:

- You should be an Accreditation Body that is a signatory member of IAF MLA under the main scope ISO/IEC 17021-1.
- An activation link, given by IAF CertSearch.



Already have an account?

[Log In](#)

- 1 Terms and Conditions — 2 Account Details — 3 Verification

Terms and Conditions

I agree to IAF CertSearch's Terms and Conditions and Privacy Policy.

I agree to IAF CertSearch's Terms and Conditions

These terms of use ('Terms') govern your use of the IAF Database LLC and its related bodies corporate (International Accreditation Forum, Inc. (IAF)) websites, databases, software and applications ('Database'). Your use of this Database will mean you accept these Terms.

The information provided in this website is a guide only and may not be complete for your purposes. We do not warrant the accuracy of any information on this website.

[Account Activation](#) ›

Activating your AB Account

1. If you meet the prerequisites, you'll be able to receive the AB activation link. Go to your inbox and open the email sent from info@iafcertsearch.org with the subject **“Activation - IAF”**.
2. Access the activation link from your browser
3. Read the Terms and Conditions, Privacy Policy, and Data Management Provisions. Check the tick boxes.

4. Complete the Activation form:

Activation Form

- Company Name
- Country
- Company Industry (optional)
- Email Address
- First Name
- Last Name
- Password
- Captcha

5. Once done, click the **Create an Account** button
6. You should receive a code via email, *the code will be sent to the email address you used for activation.*
7. Input a **6-digit code**, then click Submit
8. Once verified, click the **Submit** button
9. You have now successfully activated your AB account, proceed to get started.

What's Next?

Once you are done setting up your account you can proceed with managing your data. See the following:

- [Manage Profile](#)
- [Add Accounts](#)
- [Import Certification Bodies](#)
- [Import Certificates](#)
- [Manage Security Settings](#)

Data Management

Overview

This documentation guides you in uploading and managing your Certification Body and Certification data within IAF CertSearch database.

PAGE

[Standards](#)



PAGE

[Import Certification Body](#)



PAGE

[Import Certification](#)



Related Topics

[Certification Bodies](#)

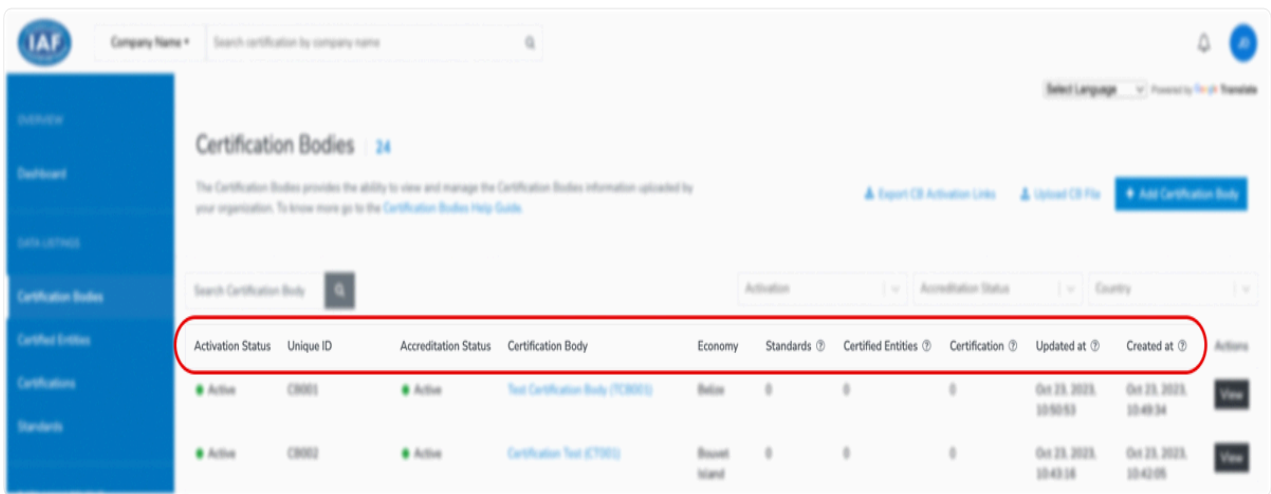
[Certified Entities](#)

[Certifications](#)

Certification Bodies

The Certification Body area provides the ability to view all your accredited Certification Bodies and manage their information.

Certification Bodies are displayed in a summary list, where you can view the following data fields:



Certification Bodies listing page

Column Name	Description	Example
Activation Status	IAF CertSearch account status of the CB	<i>Active</i>
Unique ID	The unique ID assigned to the CB	<i>AB01CB00001</i>
Accreditation Status	CB's accreditation status	<i>Active</i>
Certification Body	Certification Body Name	<i>Global Compliance Plus Pty Ltd.</i>
Economy	Country where CB is located	<i>Australia</i>

Standards	Number of standards the accreditation body has assigned to the Certification Body	10
Certified Entities	Number of Certified Entities that have been uploaded	12,000
Certification	Number of certifications uploaded	16,820
Updated at	Last time the Certification Body account was updated by the Accreditation Body	20230122
Created at	Date the certification body account was added to the database	20210221

To know how to manage the Certification Body information, check the links below:

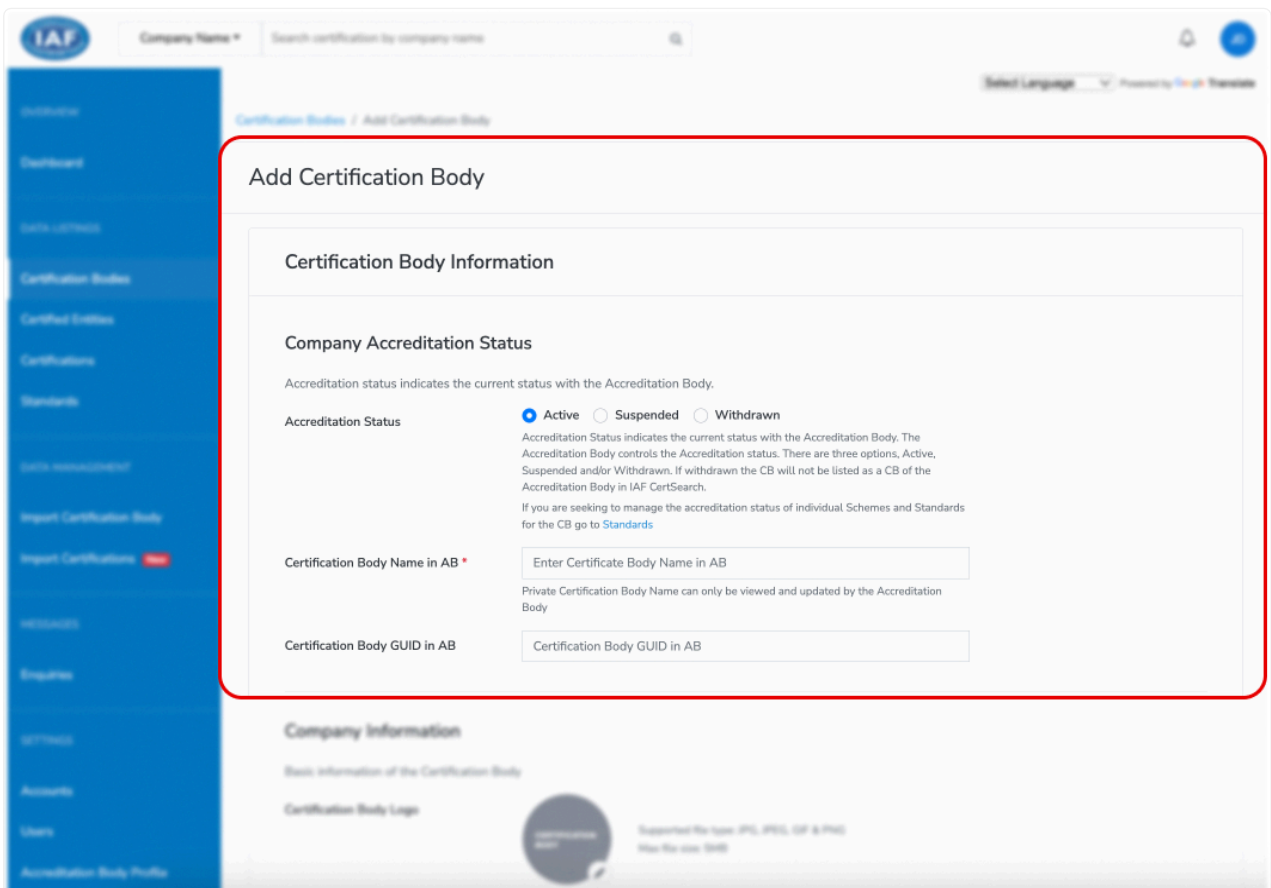
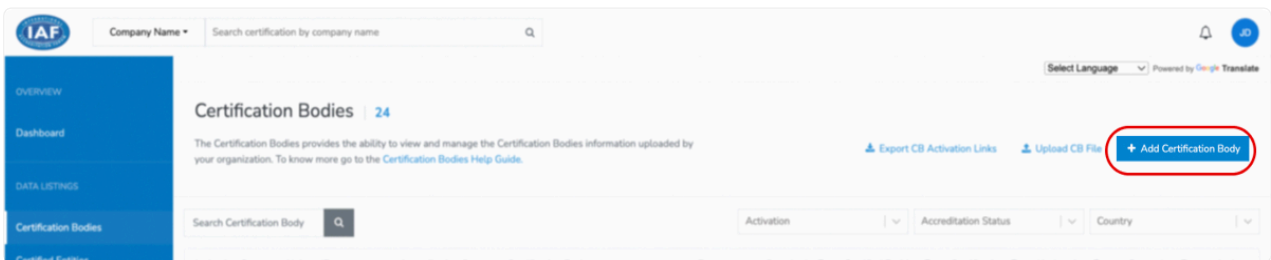
[Add Certification Body](#)

[Edit Certification Body](#)

Add CB

To manually add Certification Body:

1. Click the 'Certification Bodies' page from the left-hand navigation.
2. Click the '+ Add Certification Body' button.



3. In the Certification Body form, complete the following information.

Add Certification Body

- Accreditation Status
- Certification Body Name
- Certification Body GUID
- Certification Body Logo
- Certification Body Economy
- Certification Body Information
 - Certification Body Name
 - Certification Body Acronym
 - Certification Body Website
 - Certification Body Description

4. Once done, a Certification Body record will be added to the Certification Bodies list.

5. Here you can manage the CB's Details, Accredited Standards, Technical Sectors, Office Directories, Country/Economy, and Certificate Standards

To manage CB information, go through the following user guides:

[Manage CB Details](#)

[Manage Accredited Standards](#)

[Manage Technical Sectors](#)

[Manage Office Directories](#)

[Manage Country/Economy](#)

[View Certificate Standards](#)

To learn more about the Certification Body, click [here](#).

Want to import bulk data? Try [Data Import](#).

Manage CB Details

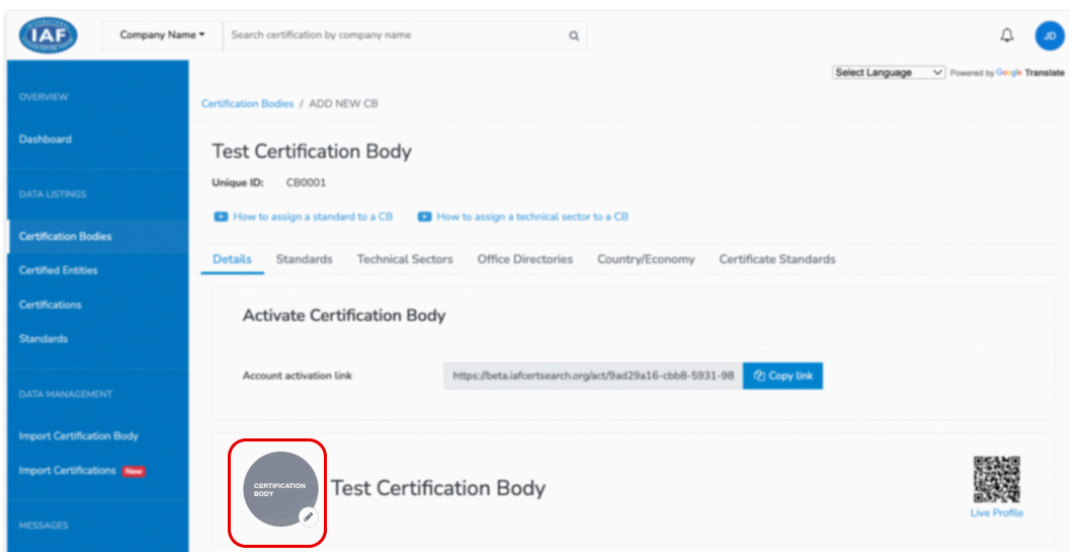
This page provides the ability to view and manage the Certification Body details. Here, you can view and edit the following information:

- Certification Body Logo
- Certification Body Economy
- Certification Body Information
 - Certification Body Name
 - Certification Body Acronym
 - Certification Body Website
 - Certification Body Description

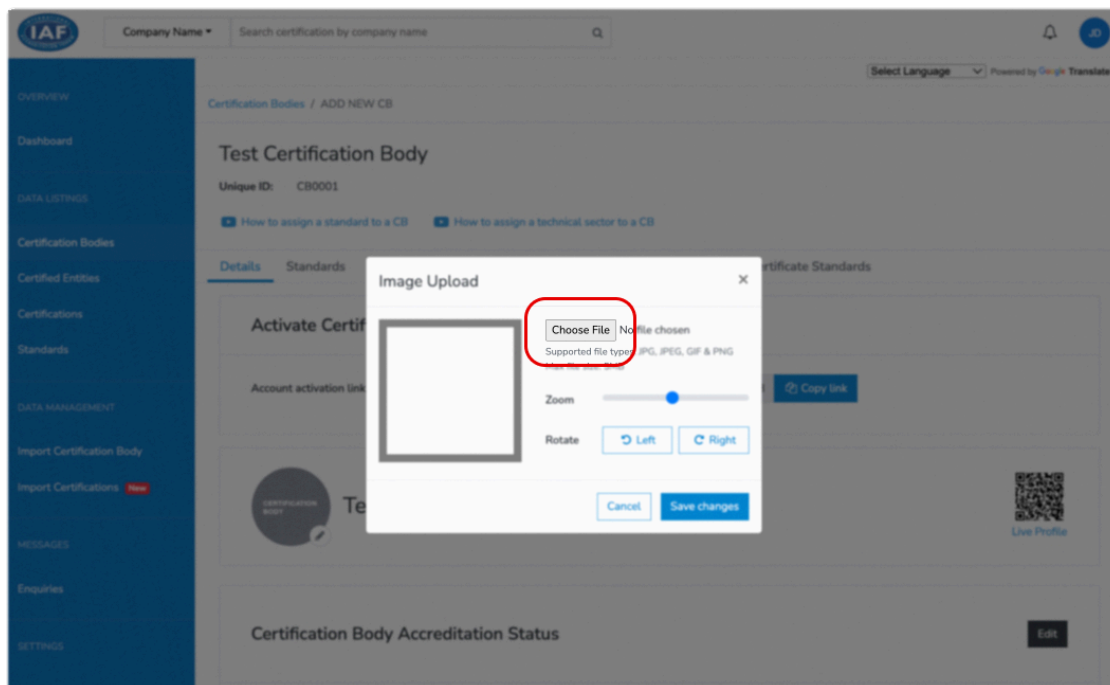
Edit Certification Body Logo

To edit the Certification Logo:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Scroll to the **Certification Body Logo** section then click the **logo placeholder**



6. Click the 'Choose File' button to upload the logo



1. In the modal, select the image you want to use as a logo
2. Once selected, click the '**Save Changes**' button
3. Once submitted the logo will be added to the CB profile.

Edit Certification Body Country/Economy

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column You'll be redirected to the CB Detail Page
4. In the **Certification Body Economy section**, click the "**Edit**" button
5. Select the country
6. Once done, click the '**Save Changes**' button

Edit Certification Body Information

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column You'll be redirected to the CB Detail Page
4. Scroll to the **Certification Body Information section** then click the "**Edit**" button
5. Input the updated data you want to change
6. Once done, click the '**Save Changes**' button

Related Articles

- [Edit Certification Body Information](#)
- [Withdraw Certification Body](#)
- [Suspend Certification Body](#)
- [Manage CB's Accredited Standards](#)
- [Manage CB's Technical Sectors](#)
- [Manage CB's Office Directories](#)
- [Manage CB's Country/Economy](#)
- [Invite the Certification Body to activate IAF CertSearch account](#)

To learn more about the Certification Body, click [here](#).

Want to import bulk data? Try [Data Import](#).

Manage CB Accreditation

This section guides you on how to manage the CB Accreditation Status.

Withdraw CB Accreditation Information

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. In the **Certification Body Accreditation Status** section click the "Edit" button
6. In the Accreditation Status field, choose the Withdraw radio button.
7. Once done, click the '**Save Changes**' button

Rules for Withdrawn Accreditation

Once the CB accreditation has been withdrawn, the CB will be limited to the following:

Feature	Restrictions
IAF CertSearch Account Login	Login access is restricted
Certification Search Access	Searchable within 3 months after the withdrawn date
Certification Public Access	Accessible within 3 months after the withdrawn date
Certification Body Profile Page	Not accessible

Suspend CB Accreditation Information

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or **click the 'view' button** under the actions column You'll be redirected to the CB Detail Page
4. In the **Certification Body Accreditation Status** section click the **"Edit"** button
5. In the Accreditation Status field, choose the **Suspend** radio button.
6. Once done, click the **'Save Changes'** button

Rules for Suspended Accreditation

Feature	Restrictions
IAF CertSearch Account Login	Login access is allowed
Certification Search Access	Searchable until expiration
Certification Public Access	Accessible until expiration
Certification Body Profile Page	Accessible

CB Activation

This documentation guides you on generating the Certification Bodies' activation link.

① Prerequisite

- A Certification Body record within your AB account

Generate Activation Link

To generate the activation link:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. In the Activate Certification Body section, click the '**Copy Link**' button

Once copied you may now send the link to their respective contact persons.

Export All Activation Links

To export all activation links to a CSV file

1. Click '**Certification Bodies**' from the left-hand navigation
2. Click the '**Export CB Activation Links**' button

Certification Bodies | 24

The Certification Bodies provides the ability to view and manage the Certification Bodies information uploaded by your organization. To know more go to the [Certification Bodies Help Guide](#).

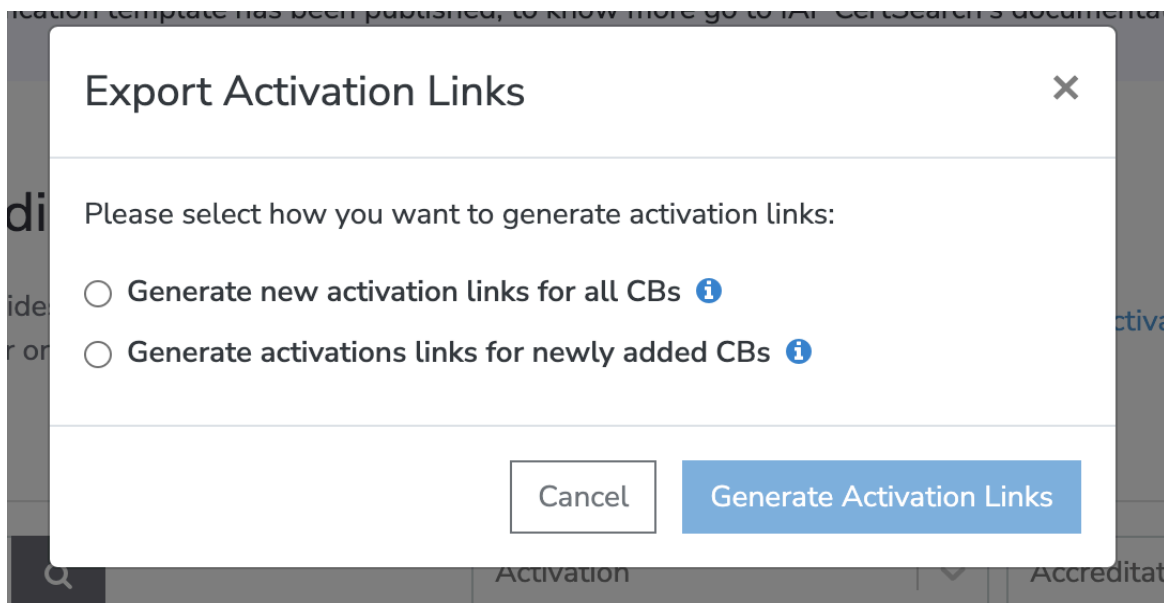
 [Export Activation Links](#)

[Upload CB File](#)

[+ Add Certification Body](#)

Export Button

3. A popup will appear to confirm what are the activation links you want to export



Generate Bulk Activation Links

Generation new activation links for all CBs

- if you want to generate new links for all CBs whether CBs are newly created or already had previously exported links.
- This overrides all the previously exported links with new expiration periods.

Generation activation links for newly added CBs

- if you want to generate new links only for the newly added CBs whether previously exported links remain the same including their expiration period.
- This keeps all the previously exported links with their existing expiration periods.
- Newly generated links will have a different expiration period than existing links that (haven't expired yet).

4. Once selected, click the **Generate Activation Links button**
5. A CSV file is downloaded on your local machine

Once generated, you may now send the links to their respective contact persons.

Manage CB's Accredited Standards

The Standards page provides the ability to manage the standards accredited to the CB. Here, you can view the following information:

- Status
- Scheme Type (Program)
- Scheme Standard (Including version)
- Standard Code
- Standard Version
- First Issued at
- Issued at
- Expiry at
- Certificate Count

To view the Standards of the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Standards**' from the navigation bar

Assign Standard to the CB

To assign a standard to the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Standards**' from the navigation bar
6. Click the '**+Assign Standard to CB**' button
7. In the modal **Assign Standard to CB**, search for the Standard you want to

accredit to the CB

8. Input the Original Issue Date, Issue Date and Expiry Date
9. Once done, click the **'Assign Standard'** button

Once assigned, the CB will then be accredited with the assigned standards which will be used by the CB to add their certification data.

Edit CB Standard

To edit the accredited standard of the CB:

1. Click **'Certification Bodies'** from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click **'Standards'** from the navigation bar
6. Search for the Standard you want to update
7. Click the **'view'** button
8. In the modal **Edit Standard to CB**, click the **'Edit'** button
9. Change the information you want to update:
 - Standard Status
 - First Issued Date
 - Issued Date
 - Expiry Date
10. Once done, click the **'Save Changes'** button

Delete CB Standard

To delete the accredited standard of the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Standards**' from the navigation bar
6. Search for the Standard you want to update
7. Click the '**view**' button
8. In the modal **Edit Standard to CB**, click the '**Delete Standard**' button
9. Confirm if you want to delete the standard by clicking the '**OK**' button

Once deleted, the CB will no longer be able to publish certificate data accredited with the deleted standard.

Manage CB's Technical Sectors

The Technical Sectors page provides the ability to manage the technical sectors of the CB. Here, you can view the following information:

The Technical Sectors page provides the ability to manage the technical sectors of the CB. Here, you can view the following information:

- Sector Code
- Sector Name
- Scheme Name
- Sector Accreditation Status
- Created at

To view the Technical Sectors of the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Technical Sectors**' from the navigation bar

Assign Technical Sectors to the CB Standard

To assign a technical sector to the CB standard:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Technical Sectors**' from the navigation bar
6. Click the '**Assign Technica Sector**' button

7. In the **Assign Technical Sector** modal, Select or Add the sector name and sector code
8. Choose the **Scheme** you want to assign the Technical Sectors to
9. Optionally, you can define the **Sector Accreditation Status** specifically for the sector you have selected
10. Once done, click the **'Assign Sector'** button

Once assigned, the Technical Sectors will be listed in the Certification Body profile.

Delete Technical Sector from the CB Standard

To delete a technical sector from the CB standard:

1. Click **'Certification Bodies'** from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click **'Technical Sectors'** from the navigation bar
6. Search for the technical sector you want to delete
7. Click the view button
 1. To delete all, click the **'Delete All Sector'**
 - Confirm by entering **'delete'** in the input box
 - Click Delete
 2. To delete individual Technical Sectors
 - In the **Assign Technical Sector** modal, click the **'Delete Sector'** button
 - Confirm by clicking the **'OK'** button

Once deleted, the Technical Sectors will be removed from the Certification Body profile.

Manage CB's Office Directories

The Office Directories page provides the ability to manage the Office Directories of the CB that you have accredited. Here, you can view the following information:

- Office Type
- Country/Economy
- Address
- Updated at
- Created at

To view the Office Directories of the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Office Directories**' from the navigation bar

Add CB Office Address

To add an office address to the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Office Directories**' from the navigation bar
6. Click the '**Add Office Directory**' button
7. In the **Add Office Directory** modal, input the following information:
 - Office Type
 - Country/Economy
 - Street

- City
- State
- Postcode

8. Once done, click the **'Submit'** button

Once added, the Office Directory will be listed in the Certification Body profile.

Edit CB Office Directory

To edit an office address:

1. Click **'Certification Bodies'** from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click **'Office Directories'** from the navigation bar
6. Search for the Office Address you want to delete
7. Click the view button
8. In the **Office Directory** modal, click the **'Edit'** button
9. Enter the updated data to the fields you intend to update
10. Once done, click the **'Save Changes'** button

Once updated, the Office Directory update should reflect in the Certification Body profile.

Delete CB Office Directory

To delete an office address from the CB standard:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name or click the 'view' button** under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Office Directories**' from the navigation bar
6. Search for the Office Address you want to delete
7. Click the view button
8. In the **Office Directory** modal, click the '**Delete Office Directory**' button
9. Confirm by clicking the '**OK**' button

Once deleted, the Office Directory will be removed from the Certification Body profile.

Manage CB's Country/Economy

The Country/Economy page provides the ability to manage the Country/Economy of the CB that you have accredited. Here, you can view the Country/Economy of the CB.

To view the Country/Economy of the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Country/Economy**' from the navigation bar

Add CB Country/Economy

To add a country/economy to the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Country/Economy**' from the navigation bar
6. Click the '**Add Country/Economy**' button
7. In the **Add Country/Economy** modal, choose the country you want to add
8. Optionally, you can define the **Economy Accreditation Status** specifically for the country you have selected
9. Once done, click the '**Submit**' button

Once added, the Country/Economy will be listed in the Certification Body profile.

Delete CB Country/Economy

To add a country/economy to the CB:

1. Click '**Certification Bodies**' from the left-hand navigation
2. Search for the CB you want to edit
3. Click the **CB name** or click the '**view**' button under the actions column
4. You'll be redirected to the CB Detail Page
5. Click '**Country/Economy**' from the navigation bar
6. Click the '**Add Country/Economy**' button
7. In the **Add Country/Economy** modal, choose the country you want to add
8. Optionally, you can define the **Economy Accreditation Status** specifically for the country you have selected
9. Once done, click the '**Submit**' button

Once added, the Country/Economy will be listed in the Certification Body profile.

View Certificate Standards

The Certificate Standards page provides the ability to view Standards and the number of certificates issued by the Certification Body. Here, you can view the following information:

- Standard (Including version)
- Standard Code
- Standard Version
- Scheme Name
- Scheme Type
- Certification

Certified Entities

The Certified Entities provides access to the Certified Entities uploaded by your organization. The certification data is collected and imported through [File Upload](#), [FTP](#), and [API](#)

This page provides the ability to view and manually manage the Certified Entity data.

Certified Entities

Click 'Certified Entities' from the left-hand navigation to view the Certified Entities list.

This page includes the following information:

Column Name	Description
Certified Entity Unique ID	<i>A unique identifier for a specific Certified Entity. Used as a reference or a tracking number to look up Certified Entity records in the IAF CertSearch database.</i>
Certified Entity	<i>Name of the Certified Entity</i>
Country	<i>Country where the Certified Entity is located</i>
Confidential Certified Entity	<i>Permission to access the Certificate Information in public, where value can either be:</i> <ul style="list-style-type: none"><i>Confidential, limits the certification details to the public</i><i>Non-Confidential allows public access to the certification details</i>
Certifications	<i>Number of certificates issued to the Certified Entity</i>

Updated at	<i>Date the certified entity data was last updated</i>
Created at	<i>Date the certified entity record was created</i>

You can also refine the list by Searching by Certified Entity Name and Filtering by Country.

This section also provides the ability to view and manage individual Certified Entity information.

Managing Certified Entity data through Data Import

① Before importing data through Data Import, learn about the IAF CertSearch Data Format and Structure, such as [Certificate File Format](#) [Certificate Template](#) [Manage Data in Excel](#), and [Manage Data in XML](#).

Data Import Methods:

- [File Upload](#)
- [FTP](#)
- [API](#)

Certifications

The Certifications provide access to the certificates uploaded by your organization, which they have issued to the Certified Entities. The certification data is collected and imported through [Manual Data Entry](#), [File Upload](#), [FTP](#) or [API](#).

In this section, you'll have the ability to manually manage the certification data.

View Certificates

To view the list of certificates, click '**Certifications**' from the left pane navigation. This page includes the following information:

Column Name	Description
Certificate Status	<i>Current standing of the Certified Entity's certification</i> <i>Certificate status dataset: active, inactive, hidden, cancelled, withdrawn, cbwithdrawn, suspended, pending, deleted, or expired</i>
Certificate Number	<i>Certificate Number that appears in the issued certificate</i>
Confidential	<i>Permission to access the Certificate Information in public</i>
Expiry Date	<i>Date on which the validity of the certificate expires.</i>
Certification Body	<i>Name of the Certification Body</i>
Certified Entity	<i>Name of the Certified Entity to which the certificate is issued to</i>
	<i>Number of accredited sites in the issued</i>

Site	<i>certificate</i>
Location	<i>Country of the main site</i>
Updated at	<i>Date on which the certification data is updated</i>
Created at	<i>Date on which the certification record is created</i>

To learn more about the Certification data fields, click [here](#).

This section also provides the ability to view and manage individual Certificate information.

Managing Individual Certification Data

- [Add Certificate](#)
- [Add Multiple Standard](#)
- [Add Additional Site](#)
- [Edit Certificate](#)
- [Edit Additional Site](#)
- [Delete Certificate](#)
- [Delete Additional Site](#)

Managing Certified Entity data through Data Import

Before importing data through Data Import, ensure to learn about the IAF CertSearch Data Format and Structure, such as Certificate File Format, Certificate Template, Manage Data in Excel, and Manage Data in XML

Data Import Methods:

- [File Upload](#)
- [FTP](#)
- [API](#)

Add Certificate

To manually add a certificate you'll have 2 options:

1. [Add to an existing Certified Entity record](#)
2. [Add a Certificate to a new Certified Entity](#)

To manually add a Certificate with a new Certified Entity:

1. go to the Certified Entity page
2. Click the 'Add Certified Entity' button
3. You'll need to fill in your data into the Certified Entity form, which has 2 data forms: Certified Entity Information and Certificate Information.

Certified Entity Information

Company Information

- Certified Entity Name (required)
- Certified Trading Name (optional)
- Certified English Name (optional)
- Confidential Certified Entity (optional)

Location Information

- Certified Entity Country (required)
- Certified Entity Street (required)
- Certified Entity City (required)
- Certified Entity State (optional)
- Certified Entity Zipcode/Postcode (required)

Certificate Information

Certificate Information

- Certification Status (required)
- Certificate Number (required)
- Certification Type (required)
- Certification Standards and Schemes (required)
- Certification Scope (optional)

Certificate Issuance Details

- Certification Original Issue Date (optional)
- Certification Issue Date (required)
- Certification Expiry Date (required)

Certification Additional Sites (optional data)

- Certified Entity Country (required)
- Certified Entity Street (required)
- Certified Entity City (required)
- Certified Entity State (optional)
- Certified Entity Zipcode/Postcode (required)

4. Once completed, click the **'Submit'** button

5. If all data is valid, the Certified Entity and its certificate will be successfully added to the IAF CertSearch.

① **Note:** If errors are encountered during the import process, go to [Error Handling](#).

To know more about Certification and Certified Entity fields, click [here](#).

Want to import bulk data? Try [Data Import](#).

Add Multiple Standards

To manually add multiple standards:

1. On the Certificate detail page, click the **'Edit'** button
2. In the standard field section, click the **'Add Standard'** button
3. In the added input box, select or search for the standard you want to add
4. Once selected, click the **'Submit'** button
5. If all data is valid, the standard will be successfully added to the certificate.

To know more about Certification and Certified Entity fields, click [here](#).

Want to import bulk data? Try [Data Import](#).

Related Articles

[Update Certificate Information](#)

[Add Multiple Standards](#)

[Add Additional Sites](#)

Add Additional Sites

To add additional sites:

1. In the Certifications listing page, search for the certificate you want the additional sites to be added
2. Click the **Certificate Number** or the **'View'** button
3. On the Certificate detail page, click the **'Additional Sites'** tab
4. Click the **'+ Add Additional Site'** button
5. Complete the additional sites fields:

Additional Sites Data Fields

- Additional Site Address (optional)
- Additional Site City (optional)
- Additional Site State (optional)
- Additional Site Zipcode/Postcode (optional)
- Additional Site Country/Economy (**required**)
- Additional Site Scope (optional)
- To learn more about Certification fields, [click here](#)

Related Articles

- Update Certificate Information
- Add Multiple Standards
- Add Additional Sites

Edit Certificate

To manually update certificate information

1. In the **Certifications** listing page, search for the certificate you want to update
2. Click the **Certificate Number**
3. On the Certificate detail page, click the **Edit** button
4. Enter the updated data into its corresponding input fields:

Certificate Information

certificate Information

- Certification Status (required)
- Certificate Number (required)
- Certification Type (read-only)
- Certification Standards and Schemes (required)
- Certification Scope (optional)
- Certification Main Site (read-only)

Certificate Issuance Details

- Certification Original Issue Date (optional)
- Certification Issue Date (required)
- Certification Expiry Date (required)

To know more about Certification and Certified Entity fields, click [here](#).

Related Articles

Update Certificate Information

Add Multiple Standards

Add Additional Sites

Edit Additional Site

To manually update additional sites

1. In the **Certifications** listing page, search for the certificate you want to update
2. Click the **Certificate Number**
3. On the Certificate detail page, click the '**Additional Sites**' tab
4. Search for the site you want to update
5. Then under the actions column click the '**Edit**' button
6. Update the data fields you want to update
7. Click the '**Save Changes**' button
8. If all data is valid, the additional site data will be successfully updated.

To know more about Certification and Certified Entity fields, click [here](#).

Want to import bulk data? Try [Data Import](#).

Related Articles

Update Certificate Information

Add Multiple Standards

Add Additional Sites

Delete Additional Site

To delete an additional site from a certificate:

1. In the Certifications listing page, search for the certificate you want the additional sites to be added
2. Click the **Certificate Number**
3. On the Certificate detail page, click the **'Additional Site'** tab
4. Search for the site you want to delete.
 - In the actions column, click the **More** icon
 - Click the **'Delete'** button
5. Confirm if you want to continue deleting the site, by clicking the **"OK"** button

To know more about Certification and Certified Entity fields, click [here](#).

Want to import bulk data? Try [Data Import](#).

Related Articles

Update Certificate Information

Add Multiple Standards

Add Additional Sites

Delete Certificate

Here are articles that guide you through manually deleting certificate data from the AF CertSearch database.

ⓘ IMPORTANT NOTE: Please be aware that once you have deleted your certifications they are **permanently deleted from the database it is not possible to reverse this action**. The IAF Database LLC takes no responsibility for any ramifications that may be caused by taking this action, see terms and conditions for further detail.

Delete an individual certificate

1. In the **Certifications** listing page, choose the certificate you want to delete
2. Scroll to the bottom section of the certification detail page
3. Click the **'Delete Certificate'** button
4. To ensure that you are not accidentally deleting the certification data, a delete confirmation is needed.
5. Click the **'Send OTP'** button
6. Copy the code from your inbox and paste it into the Verify OTP input fields
7. Once completed, click the **'Delete Certification'** button.

To know more about Certification and Certified Entity fields, click [here](#).

Want to import bulk data? Try [Data Import](#).

Standards

The Standards section provides the ability to view and manage all standards uploaded under the Accreditation Body which are accredited to the Certification Bodies.

- [View and Manage AB Standards](#)
- [Add new Standards to the Standard library](#)
- [Add a new Scheme to the Scheme's library](#)
- [View IAF MLA accredited Standards](#)
- [View and Manage Technical Sectors](#)

Note:

- IAF CertSearch validates the Standards and Schemes data to match the certificate information uploaded by the accredited CBs with the AB Standards you have assigned to them.
- IAF CertSearch also validates Standards and Schemes against the IAF MLA Standards to determine which certificates are accredited with IAF MLA.
- Ensuring that you enter the exact data issued to your Certification Bodies helps with reducing data inconsistencies and data import issues.

Standards Field Names Glossary

Below are the names of the fields listed in the Standard list:

Field Name	Example	Description
Status	<i>Active</i>	Current standing of the Standard.
Scheme Type (Program)	<i>Management Systems</i>	Refers to the main scope of the certificate
Scheme	<i>Quality Management Systems Scheme</i>	Specific certification program or framework to which the certificate relates.

Standard (Including version)	<i>ISO 9001:2015</i>	Specific set of criteria, requirements, or guidelines that the certified entity has been assessed against and found to be in compliance with
Standard Code	<i>ISO 9001</i>	
Standard Version	<i>2015</i>	Refer to different editions or revisions of a particular standard
Certification	100	Number of certificates accredited with the Standard
First Issued at	<i>20191120</i>	Date on which the certificate was first issued or granted to the Certified Entity
Issued at	<i>20211123</i>	Date on which the standard was officially issued or granted
Expiry at	<i>20251123</i>	Date on which the validity of the standard will come to an end.

When viewing the list of standards, you can filter by status, and search by standard name.

AB Standards

View Individual AB Standard Details

To view individual AB Standard Details:

1. Click the 'Standards' page from the left-hand navigation.
2. Look for the Standard you want to view
3. Under the Actions column, click the **View** button
4. A modal should pop up which displays the selected Standard details.

Update Individual AB Standard Details

To update individual AB Standard Details:

1. Click the 'Standards' page from the left-hand navigation.
2. Look for the Standard you want to view
3. Under the Actions column, click the **View** button
4. A modal should pop up which displays the selected Standard details.
5. Click the **Edit** button
6. You'll be able to update the following fields:

Update AB Standard Fields

 **Note:** Standard field remains **READ ONLY**

- Standard Status
- Scheme
- First Issued Date
- Issued Date
- Expiry Date

Add AB Standards

📘 Prerequisite:

- Ensure the correct scheme is included in the scheme library
 - [Learn how to add standard to the standard library](#)
- Ensure the correct standard is included in the standards library
 - [Learn how to add the scheme to the scheme library](#)

To add new AB Standards:

1. Click the 'Standards' page from the left-hand navigation.
2. Click the **+ Add Standard to AB** button
3. Complete the Add Standard form

Add standard Form

- Standard Status
- Scheme
- Standard (Including version)
- First Issued Date
- Issued Date
- Expiry Date

Explanations of formats for each field are detailed in the [Standard Field Names Glossary](#).

4. Click the **Add Standard** button
5. Once saved, the standard will be added to your AB Standards list and can now be assigned to Certification Bodies, allowing Certification Bodies to upload certificates to that standard.

Delete AB Standards

① Prerequisite:

- Ensure that the standard is not assigned to any active certifications. If assigned, deleting the standard is not permissible.

To delete an AB Standards:

1. Click the 'Standards' page from the left-hand navigation.
2. Click the **+ Add Standard to AB** button
3. Look for the Standard you want to view
4. Under the Actions column, click the **View** button
5. A modal should pop up which displays the selected Standard details.
6. Click the **Delete Standard** button
7. Once deleted, the standard will no longer be seen in your AB Standards list and cannot be assigned to any Certification Bodies.

Add Standard to Library

Add standard to library

When you can't find the exact standard in the standard list, you will need to add the standard to the library.

1. Click the 'Standards' page from the left-hand navigation.
2. On the AB Standards page, click the **+ Create Standard to Global Library** button.
3. In the modal, enter the following fields:
 - Standard Code (*i.e. ISO 9001*)
 - Standard Version (*i.e. 2015*)
4. Once completed, click **Create Standard**
5. Once you have saved the standard, it will now appear in the standard global library list and can be assigned to the Certification Bodies.

Add Scheme to Library

Add scheme to library

When you can't find your exact scheme in the scheme list, you will need to add the scheme to the library.

1. Click the 'Standards' page from the left-hand navigation.
2. On the AB Standards page, click the **+ Create Scheme to Global Library** button.
3. In the modal, enter the following fields:
 - Scheme Type (Program) (*i.e. Management System*)
 - Scheme (*i.e. Quality Management System*)
4. Once completed, click **Create Scheme**
5. Once you have saved the scheme, it will now appear in the standard global library list and can be assigned to the Certification Bodies.

IAF MLA

This section provides the ability to view all your standards with IAF MLA accreditation. Here, you can view the following information:

- Scope Level
- Scheme Type (Program)
- Standard Code
- IAF MLA Status
- Scope Date
- Created at

✓ **What is IAF MLA?**

Accreditation Body and Regional Accreditation Group Members of IAF are admitted to the IAF MLA only after a stringent evaluation of their operations by a peer evaluation team which is charged to ensure that the applicant complies fully with both international standards and IAF requirements. Once an accreditation body is a signatory of the IAF MLA, it is required to recognise certificates and validation and verification statements issued by conformity assessment bodies accredited by all other signatories of the IAF MLA, with the appropriate scope.

The IAF MLA consists of a five-level arrangement, with levels 2 and 3 constituting main scopes and levels 4 and 5 constituting sub-scopes. More information on the structure of the MLA can be found in [IAF PL 3: Policies and Procedures on the IAF MLA Structure and for Expansion of the Scope of the IAF MLA](#), and the current status of the IAF MLA is available in [IAF MLA Status](#).

Reference: <https://iaf.nu/en/about-iaf-mla/>

Technical Sectors

This page provides the ability to view all the technical sectors applied to the accreditation standards. Here, you can view and manage the Technical Sectors.

Add Technical Sectors

To add technical sectors:

1. Click the 'Add Technical Sector' button
2. In the modal, enter the Sector Name
3. Click 'Submit'

∨ What is a Technical Sector?

Certificates can be applied to any industry and sector, there are core standards that apply to any business and there are also specialist standards that are sector-specific.

Import Certification Body

In this section:

- [CB File Formats](#)
- [File Upload](#)
- [FTP Access](#)
- [Data Mapping](#)
- [Field Mapping](#)

Certification Body Templates

To successfully import CB data into IAF CertSearch, you need to know about the following:

Learn about the CB data structure:

[Certification Body Fields Glossary](#)

Downloadable Template

To successfully import your certification data into the IAF CertSearch database, it is required that the data be formatted in the provided templates.

Latest version - Summary

version number: 1.1

Release note: [IAF CertSearch Release - February 14, 2024](#)



Download template: [version 1.1](#)

Excel Help Guides

- [View Excel Sample](#)
- [How to manage CB data in Excel](#)
- [Excel General Rules](#)



Download template: [version 1.1](#)

XML Help Guides

- [View XML Sample](#)
- How to manage CB data in XML
- XML General Rules

Previous versions

Excel Templates

EXCEL previous template versions

Version	Templates	Release notes	Sample Data
1.0	download	N/A	1.0 sample data

XML Templates

XML previous template versions

Version	Templates	Release notes	Sample Data
1.0	download	N/A	1.0 sample data

Manage Data in Excel

Import Data in Excel

We have added useful guides to help you manage your data in an Excel file.

- [Adding CB Data](#)
- [Updating CB Data](#)
- [Withdraw a CB](#)
- [Suspend a CB](#)
- [Add Accreditation details to an existing CB](#)

Import Certification Body Data from Excel file

NOTE: Adding Certification Body via Excel is recommended for bulk data import. If you want to update a single record or records not more than 10 certificates we recommend you use the Manual Data Entry.

Prerequisites:

- Clean and format data according to the IAF CertSearch data structure.

To update Certification Body via Excel

1. In the Certification Body Excel spreadsheet, enter the data into their corresponding fields.

Certification Bodies				
<ul style="list-style-type: none">• Certification Body Identity Number• Certification Body Name• Certification Body Acronym• Accreditation Status• Website• Country/Economy• Description				

	Office Directories			
<ul style="list-style-type: none">• Certification Body Identity Number• Office Type• Street City• State• Country/Economy• Zipcode/Postcode				

		Standards & Schemes		
<ul style="list-style-type: none">• Certification Body Identity Number• Scope Type• Scheme/Program• Certification Standard Code• Standard Status• Accreditation First Issue Date• Accreditation Issue Date• Accreditation Expiry Date				

			Technical sectors	
<ul style="list-style-type: none">• Certification Body Identity Number• Scope Type• Scheme/Program• Sector/IAF Code• Title Sector/IAF Code• All Sectors• Sector Accreditation Status				

				Certification Body Countries
<ul style="list-style-type: none">• Certification Body Identity Number• Country/Economy• Economy Accreditation Status				

Tips: Ensure that the Certification Body Identity Number and the Certification Body Name match with the existing Certification Body record.

2. Once completed, go to the IAF CertSearch Data Import page
3. Choose how you would like to import your data
 - a. **File Upload** - [Learn how to import data through File Upload](#)
 - b. **FTP** [Learn how to import data through FTP](#)
4. Once selected, click the **Continue** button (the system will initiate file and data processing)
5. If all the files and data are valid, the certificate will be successfully added to the existing Certified Entity record.

Manage Data in XML

Import Certification Body Data from XML file

NOTE: Adding Certification Body via XML is recommended for bulk data import. If you want to update a single record or records not more than 10 certificates we recommend you use the Manual Data Entry. **Prerequisites:**

- Clean and format data according to the IAF CertSearch data structure.

To update Certification Body via Excel

1. In the Certification Body Excel xml file, enter the data into their corresponding fields.

CB Data XML Fields

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<ab_cbs>
```

```
  <certification_body>
```

```
<certification_body_identity_number></certification_body_identity_number>
```

```
  <certification_body_name></certification_body_name>
```

```
  <certification_body_acronym></certification_body_acronym>
```

```
  <website></website>
```

```
  <key_contact></key_contact>
```

```
  <email_address></email_address>
```

```
  <phone></phone>
```

```
  <fax></fax>
```

```
  <country></country>
```

```
  <description></description>
```

```
<accreditation_status></accreditation_status>
```

```
<office_directories>
  <office_directory>
    <office_type></office_type>
    <street></street>
    <city></city>
    <state></state>
    <country></country>
    <zip_code></zip_code>
  </office_directory>
</office_directories>
<standard_and_schemes>
  <standard_and_scheme>
    <scope_type></scope_type>
    <scheme_name></scheme_name>
    <standard_code></standard_code>
    <first_issue_date></first_issue_date>
    <issue_date></issue_date>
    <expiry_date></expiry_date>
  <standard_status></standard_status>
</standard_and_scheme>
</standard_and_schemes>
<technical_sectors>
  <technical_sector>
    <scope_type></scope_type>
    <scheme_name></scheme_name>
    <sector_title></sector_title>
    <sector_code></sector_code>
    <all_sectors></all_sectors>
  </technical_sector>
</technical_sectors>
<sector_accreditation_status></sector_accreditation_status>
```

```
<certification_body_countries>
  <certification_body_country>
    <country></country>
  </certification_body_country>
</certification_body_countries>
</certification_body>
</ab_cbs>
```

Tips: Ensure that the Certification Body Identity Number and the Certification Body Name match with the existing Certification Body record.

1. Once completed, go to the IAF CertSearch Data Import page
2. Choose how you would like to import your data
 1. **File Upload** - [Learn how to import data through File Upload](#)
 2. **FTP** [Learn how to import data through FTP](#)
3. Once selected, click the **Continue** button (the system will initiate file and data processing)
4. If all the files and data are valid, the certificate will be successfully added to the existing Certified Entity record.

File Upload

① Pre-requisites:

- Data formatted in an [Excel](#) or [XML](#) file

Average Transfer Speed: 30 secs ~ 2 mins, may vary depending on the data quality

Acceptable Formats: XLS, XLSX and XML

Recommended: Small, Medium and Large CBs that have anywhere between 20 to 100,000 certifications

How to import Certification Body data via File Upload

To import your data via File Upload:

1. go to the **Import Certification Body** page
2. Look for the Upload Data section
3. Click the '**Upload Certification Bodies**' button
4. Select the files you want to update

① **NOTE:** you can only upload 1 file at a time.

5. Click on the upload section to select the files from your local **or** drag and drop the files you want to upload:
6. Once selected, click the **Upload** button
7. Once uploaded, the system initiates the data validation
8. Once validated, your data will successfully be added to IAF CertSearch

If errors are encountered during the Certification Body data validation, the errors will be listed in the File Upload Activities.

FTP Access

Getting Started

FTP allows you to upload data in bulk from your server every 24 hours. This works for both Excel and XML formats. Users are required to set up an Active FTP connection and the filenames to be retrieved from the server.

Acceptable Formats: XLSX and XML

Recommended: Small, Medium, and Large Certification Bodies that have anywhere between 20 to 50,000 certifications

Prerequisites

1. Set up an Active FTP Connection
 2. *In your FTP server, upload files (.xlsx or XML) with your formatted data*
 3. Define the filenames you want to retrieve from the server
-

How to import Certification Body data via FTP

1. go to '**Import Certification Body**' page
2. Select '**FTP**' in the navigation tab
3. Fill out or edit the following text fields
 - FTP Access Status
 - **Active**, *continuously fetch/download the files from the FTP*
 - **Inactive**, *stops fetching /downloading the files from the FTP*
 - FTP Server Protocol
 - **FTP**, *relies on usernames and passwords for authentication*
 - **SFTP**, *uses SSH keys for authentication, which are much more secure*
 - Server Host

- Server Port
 - Server Username
 - Server Password
 - If **SFTP** is selected, add the **Private Key**
4. To check if the FTP is successfully connected, click the '**Test FTP Connection**' button.
 5. Once the FTP is connected, click the '**Save and Continue**' button.
 6. In the next screen, add the file names you want to fetch from the FTP server
 - You can tick the '**Wildcard**' option if you have multiple files in the FTP directory to be fetched with a common naming convention

① Example:

The filename is **certs** and the 'Wildcard' option is ticked.

Then, the system will look for the following filenames in the directory:

- **certs_1.xlsx**
- **2_certs.xlsx**
- **3_certs_4.xlsx**

7. Once added, click the '**Fetch Data**' button
8. Once done, the process proceeds to **Step 2** where data validation is initiated
9. Once validated, your data will successfully be added to IAF CertSearch

Define the filenames

Defining or nominating the filenames is required so that IAF CertSearch can retrieve your data from your server into the IAF CertSearch database.

Prerequisite

Before defining the filenames, ensure that you have uploaded the files *that contain your formatted data* into the FTP server.

1. In the FTP Settings page, go to the **FTP File Names section**
2. Click, the **'Add FTP Filenames'** button
3. In the Add FTP File Name modal, add the filenames you want to retrieve.

Fetch Files from FTP

- Once the files are defined, you can either choose to:
- Fetch the files right away, which can be done by manually clicking the 'Fetch Files' button
- Fetch during the FTP crawl schedule which starts at UTC 01:00 am daily

Rules

- Any changes made to your file will be updated every 24 hours.
- If the file names do not match, the system will not upload the file.
- Fetching the files will be skipped if there is no filename in the FTP filename section.

FTP Data Import Activities

Allows you to see all the FTP import activities.

Data Mapping

The Data Mapping feature provides the ability to view and manage all your mapped data of all your import activities.

What is Data Mapping?

Data Mapping issues are caused when the data value from the source file does not match the required data value in the IAF CertSearch database, See the example below:

Source	The actual data value that exists from your source file, that is not recognized by the system.
Target	The data value defined in the IAF CertSearch database.

Tips:

To minimize data upload issues, we recommend you add data mapping before importing your data. This way you can eliminate interruption during the import process. To know more about adding data mapping, [click here](#).

View all your mapped data

1. Go to '**Import Certification Body**'
2. Click the '**Data Mapping**' tab
3. In the Data Mapping tab, you'll have access to all of your Mapped and Unmapped data from all of your import activities.
4. If you prefer to see a list filtered by a specific field, you can click through the navigation tab.
 - **Country** - All mapped and unmapped data related to the Country field

- **Certification Type** - All mapped and unmapped data related to the Certification Type field
 - **Standard** - All mapped and unmapped data related to the Standard field
 - **Scheme** - All mapped and unmapped data related to the Scheme field
 - **Certificate Status** - All mapped and unmapped data related to the Certificate Status field
-

Add Data Mapping

1. Go to '**Import Certification Body**'
 2. Click the '**Data Mapping**' tab
 3. In the Data Mapping tab, click the '**+ Add Data Mapping**' button
 4. Enter the value of the source data
 5. Select where you want to map the source data
 6. If you want to add multiple mapping:
 - Click the '**Add Data Mapping**' button
 7. Once done, click the '**Submit**' button
-

Edit Mapped Data

1. Go to '**Import Certification Body**'
2. Click the '**Data Mapping**' tab
3. In the Data Mapping tab list, look for the mapped data you want to edit.
4. Click the '**Actions**' button, then click '**View Details**'
5. In the Mapping Details modal, click 'Edit'
6. Update the fields you want to edit.
7. Once done, click the '**Save Changes**' button

Delete Mapped Data

1. Go to '**Import Certification Body**'
2. Click the '**Data Mapping**' tab
3. In the Data Mapping tab list, look for the mapped data you want to edit.
4. Click the '**Actions**' button, then click '**Delete Mapping**'
5. A delete confirmation modal should appear, click 'OK'
6. Once done, your mapped data should be deleted from your Data Mapping list.

Field Mapping

This section guides you on how to manage your Global Mapping settings which includes, Data Mapping and Field Mapping.

You'll have the ability to view and manage all your mapped fields and data on the Global Mapping page on their respective pages.

1. Go to '**Import Certification Body**'
 2. Click the '**Field Mapping**' tab
 3. Look for the mapped data you want to edit.
 4. Click the '**Actions**' button, then click '**Delete Mapping**'
 5. A delete confirmation modal should appear, click 'OK'
 6. Once done, your mapped data should be deleted from your Field Mapping list.
-

Field Mapping Rules

- Any unrecognized field names will not be recognized and require field mapping.
- One (1) source field **CAN'T** be mapped to multiple target fields
 - *In this example, Issue Date is mapped to Certification Issue Date and Certification Original Issue Date.*
 - **Issue Date** -> Certification Original Issue Date
 - **Issue Date** -> Certification Issue Date
- Multiple source fields values **CAN** be mapped to one (1) target field
 - *In this example, Cert Status and Status are mapped to Certification Status.*
 - **Cert Status** -> Certification Status
 - **Status** -> Certification Status
 - In Excel, renaming the sheet tab name is considered a field mapping issue

Import Certification

The Import Certification page allows you to manage and import bulk data. Here, you can import your data through different methods such as File Upload, FTP, and API. You'll also have the ability to manage your import settings such as the FTP Settings, API Integration Settings, Global Mapping and Import Settings.

In this Section

- [Certification File Templates](#)
- [Data Import Methods](#)
 - [File Upload](#)
 - [FTP](#)
 - [API](#)
- [FTP Settings](#)
- [API Integration Settings](#)
- [Global Mapping](#)
- [Import Activities](#)

Certification File Templates

To successfully import Certification Body data into IAF CertSearch, you need to know about the following:

Learn about the Certification data structure

[Certification Body Fields Glossary](#)

Downloadable Templates

To successfully import your certification data into the IAF CertSearch database, it is required that the data be formatted in the provided templates.

Latest version - Summary

version number: 1.1

Release note: [IAF CertSearch Release - February 20, 2024](#)



Download template: [version 1.1](#)

Excel Help Guides

- [View Excel Sample](#)
- [How to manage CB data in Excel](#)
- [Excel General Rules](#)



Download template: [version 1.1](#)

XML Help Guides

- [View XML Sample](#)
- How to manage CB data in XML
- XML General Rules

Previous versions

Excel Templates

EXCEL previous template versions

Version	Templates	Release notes	Sample Data
1.0	download	N/A	1.0 sample data

XML Templates

XML previous template versions

Version	Templates	Release notes	Sample Data
1.0	download	N/A	1.0 sample data

Excel General Rules

General Rules

File Format	File format should be <code>.xlsx</code> only
Column Header Names	Keep the column names the same as the template. If changed, the system requires field mapping to recognise the data.
Column Sequence	Keep the order of the columns the same as in the template. If changed, the data processing may be disrupted and cause data errors.
Sheet Tab Sequence	Keep the order of the sheet tabs the same as in the template. If changed, the data processing may be disrupted and cause data errors.
Record limit	The maximum record limit for the certification sheet of the Excel file is 10,000. If the certification sheet in your Excel file has more than 10,000 records, then you need to upload multiple files that are only limited to up to 10,000 records per file.
File size	The maximum file size for Excel files is 50MB. If your Excel file is greater than 50MB then you need to upload multiple files that are all less than 50MB.
File name(s)	IAF CertSearch recommends you name your files as per below: Single: <code>ab_certs.xlsx</code> Multiple files: <code>ab_certs_1.xlsx</code> <code>ab_certs_2.xlsx</code> <code>ab_certs_3.xlsx</code>

DOs

1. **Keep data format consistent**
2. **Format data into the provided IAF CertSearch template**
3. **Enter single data value entry per cell**

DON'Ts

1. **Do not upload other formats** supported in Excel, such as .xls, .xlsm, .xlsx, .xlr
2. **Do not delete any columns** from the template. If deleted, the system will throw a missing field error.
3. **Do not skip field mapping.** If skipped, data is not processed and imported.
4. **Do not merge columns.** If merged, the system throws a data field error.
5. **Do not leave the required fields empty**
6. **Do not format data values as formulas.**

Tips

- To minimize import interruptions, it is recommended not to update/delete/change any of the field names and structure.
- Remove any unnecessary or redundant columns that won't be used in the analysis.
- Check for missing or incomplete data and decide how to handle it (e.g., filling in missing values, removing rows, etc.).
- Validate data entries to ensure they meet required standards (e.g., valid dates, numeric values, etc.).
- **Remove Duplicates.** Eliminate duplicate rows or entries to prevent redundancy and inaccuracies in analysis.
- Make sure data types for each column match the requirements of IAF CertSearch. For example, data values should be in the text format.
- Thoroughly understanding the IAF CertSearch requirements and the characteristics of your data will help ensure a successful data import process.

Manage Data In Excel

We have added useful guides to help you manage your data in an Excel file.

Import Certification Data from Excel file

① **NOTE:** Adding certification via Excel is recommended for bulk data import. If you want to update a single record or records not more than 10 certificates we recommend you use the Manual Data Entry. **Prerequisites:**

- Clean and format data according to the IAF CertSearch data structure. [Learn more.](#)

(1) To add certification data to an existing Certified Entity via Excel

1. In the Certificate Excel spreadsheet, please enter the data into their corresponding fields.

Certified Entity Information

- Certified Entity Name (**required**)
- Certified Trading Name (optional)
- Certified English Name (optional)
- Certified Entity Street (**required**)
- Certified Entity City (**required**)
- Certified Entity State (optional)
- Certified Entity Country (**required**)
- Certified Entity Zipcode/Postcode (**required**)

Certificate Information - certificate issued to the Certified Entity

- Certificate Number (**required**)
- Certification Status (**required**)
- Certification Type (**required**)
- Certification Standards and Schemes (**required**)

- Certification Scope (optional)
- Certification Original Issue Date (optional)
- Certification Issue Date (**required**)
- Certification Expiry Date (**required**) To learn more about Certification fields, click here.

Tips: Ensure that the Certified Entity Unique ID and the Certified Entity name match with the existing Certified Entity record.

2. Once completed, go to the IAF CertSearch Data Import page
3. Choose how you would like to import your data
 - a. **File Upload** - Learn how to import data through File Upload
 - b. **FTP** - Learn how to import data through FTP
4. Once selected, click the **Continue** button (the system will initiate file and data processing)
5. If all the files and data are valid, the certificate will be successfully added to the existing Certified Entity record.

Note: If errors are encountered during the import process, go to Error Handling.

(2) To add certification data to a new Certified Entity record

1. In the Certificate Excel spreadsheet, please enter the data into their corresponding fields.

Certification



Tips: Ensure that the CIN matches the certificate record references across all the tabs.

- Certification Identity Number (required)
- Certificate Number (required)
- Certification Status (required)
- Certification Type (required)
- Certified Entity Name (required)
- Certified Trading Name (optional)
- Certified English Name (optional)
- Certified Entity Street (required)
- Certified Entity City (required)
- Certified Entity State (optional)
- Certified Entity Country (required)
- Certified Entity Zipcode/Postcode (required)
- Certification Scope (optional)
- Certification Original Issue Date (optional)
- Certification Issue Date (required)
- Certification Expiry Date (required)

Certification Additional Sites

Tips: Ensure that the CIN matches the existing certificate record added within the Certification sheet tab.

- Certification Identity Number (required)(required)
- Additional Site Address (optional)
- Additional Site City (optional)
- Additional Site State (optional)
- Additional Site Zipcode/Postcode (optional)
- Additional Site Country/Economy (required)
- Additional Site Scope (optional) To learn more about Certification fields, click here

2. Once completed, go to the IAF CertSearch Data Import page
3. Choose how you would like to import your data
 - a. **File Upload** - Learn how to import data through File Upload
 - b. **FTP** - Learn how to import data through FTP
4. Once selected, click the '**Continue**' button (*which initiates data validation*)
5. If all the files and data are valid, the Certified Entity and Certification records will be successfully added.

Certification Standard & Scheme

Tips: Ensure that the CIN matches the existing certificate record added within the Certification sheet tab.

- Certification Identity Number (required)
- Standard Name (required)
- Scheme Name (required)

- > To view the added certifications go to the **Certification** listing page
- > To view the added certifications go to the **Certified Entity** listing page

Updating Certification Data from Excel file

TIPS: We recommend updating the same file you used to upload your data, that way you minimize import interruptions or errors.

To update certification data via Excel

In the Certificate Excel spreadsheet, look for the data that you want to update.

TIPS: Ensure that the Certified Entity Unique ID and the Certified Entity name match with the existing Certified Entity record.

Certified Entity Information

- Certified Entity Name (required)
- Certified Trading Name (optional)
- Certified English Name (optional)
- Certified Entity Street (required)
- Certified Entity City (required)
- Certified Entity State (optional)
- Certified Entity Country (required)
- Certified Entity Zipcode/Postcode (required)

Certificate Information - certificate issued to the Certified Entity

- Certificate Number (required)
- Certification Status (required)
- Certification Type (required)
- Certification Standards and Schemes (required)
- Certification Scope (optional)
- Certification Original Issue Date (optional)

- Certification Issue Date **(required)**
 - Certification Expiry Date **(required)** To learn more about Certification fields, [click here](#)
1. Once completed, go to the IAF CertSearch Data Import page
 2. Choose how you would like to import your data
 - **File Upload** - Learn how to import data through File Upload
 - **FTP** - Learn how to import data through FTP
 3. Once selected, click the **Continue** button (*which initiates the data validation process*)
 4. If all the fields and data are valid, the certificate will be successfully added to the existing Certified Entity record.

Note: If errors are encountered during the import process, go to [Error Handling](#)

XML General Rules

General Rules

Here are the general rules to successfully upload certification data through an XML file:

File Format	The file format must be <code>xml</code>
File Size	The maximum file size for XML files is 50MB. If your XML file is greater than 50MB then you need to split it up and upload multiple files that are each less than 50MB.
Filename	IAF CertSearch recommends that you name your files using the following formats: Single: <code>cb_certs.xml</code> Multiple files: <code>cb_certs_1.xml</code> <code>cb_certs_2.xml</code> <code>cb_certs_3.xml</code>
XML Tag	XML tags must be the same as in the template. If changed IAF CertSearch will not recognise the field data and will not be uploaded
XML Tag sequence	Tags should be in order and must be the same as in the template. If changed IAF CertSearch will not recognise the tabs and the data in those tabs will not be uploaded.

Understanding XML file format

Important Notes

- 1. XML documents must contain one root element that is the parent of all other elements:**

For cert upload, the root element is `<client_certs></client_certs>`

- 2. This line is called the XML prolog** `<?xml version="1.0" encoding="UTF-8?">`

The XML prolog is optional. If it exists, it must come first in the document. XML documents can contain international characters, like Norwegian øæå or French êèé. To avoid errors, you should specify the encoding used, or

save your XML files as UTF-8. UTF-8 is the default character encoding for XML documents.

3. **All XML Elements Must Have a Closing Tag** XML tags are case-sensitive. The tag is different from the tag. The opening and closing tags must be written in the same case: any tags there are left unclosed will result in an error: **Invalid XML file uploaded Wrong:**

`<certification_body_identity_number>%VALUE GOES HERE` **Correct:**

`<certification_body_identity_number>%VALUE GOES
HERE</certification_body_identity_number>`

4. **XML Elements Must be Properly Nested**

In XML, all elements must be properly nested within each other: **Wrong:**

`<certification_identity_number>`

`<certification>CERT-0001</certification_identity_number> </certification>`

Correct: `<certification>`

`<certification_identity_number>CERT-0001</certification_identity_number
></certification>`

5. **Tags cannot contain blank space eg.** `<certification identity number>` The system will not recognize this syntax and will throw an error: **Invalid XML file uploaded**
6. **All parent tags should be included when uploading an XML file**, if the parent tags are missing, the system will throw an error: **Invalid XML file uploaded**
7. **If the certification_standard_and_scheme and its children are empty**, the system will throw an error: **Invalid XML file uploaded**
8. **Invalid tags for optional fields will not trigger an error**, but the data added within the tag won't be displayed in the system
Correct:`<original_issue_date>01/20/2021</original_issue_date>` **Wrong (from file):** `<orig_issued_date>01/20/2021</orig_issued_date>`

Data displayed in the system

Original Issued Date: (*empty*)

DOs and DONTs when formatting data in an XML

Things to keep in mind when populating your data into an XML file.

DOs

- 1. Single data value entry per tag**

Ensure only single data values are entered into one tag. When uploading multiple data values don't include more than one data value in one tag.

- 2. Keep data format consistent**

A mismatch in spaces, capitalization, and other types of formatting will cause an error and data will not be matched

- 3. Keep the syntax similar to what is provided in the template**

DONTs

- 4. Do not leave the mandated fields blank or empty**

- 5. Do not add multiple data to a 1 tag**

- 6. Do not merge multiple data to a 1 tag**

Manage Data in XML

We have added useful guides to help you manage your data in an XML file.

Import Certification Data from XML file

- i NOTE: Adding certification via XML is recommended for bulk data import. If you want to update a single record or records not more than 10 certificates we recommend you use the Manual Data Entry.

Prerequisites:

Clean and format data according to the IAF CertSearch data structure.
[Learn more](#)

(1) To update certification data to an existing Certified Entity via XML

1. In your text editor, please enter the data into their corresponding tags.

XML Fields

```
?xml version="1.0" encoding="UTF-8"?>
  <ab_certs>
    <certification>
      <certificate_identity_number></certificate_identity_num
      <certificate_number></certificate_number>
      <certification_status></certification_status>
      <accreditation_status></accreditation_status>
      <certification_type></certification_type>
      <certification_scope></certification_scope>
      <certification_original_issue_date></certification_origi
      <certification_issue_date></certification_issue_date>
      <certification_expiry_date></certification_expiry_date>
      <certified_entity_name></certified_entity_name>
      <certified_entity_trading_name></certified_entity_tradin
      <certified_entity_english_name></certified_entity_englis
      <certified_entity_unique_id></certified_entity_unique_id
      <certified_entity_street></certified_entity_street>
      <certified_entity_city></certified_entity_city>
```

```
<certified_entity_state></certified_entity_state>
<certified_entity_zip_code></certified_entity_zip_code>
<certified_entity_country></certified_entity_country>
<certification_body_identity_number></certification_body
<certification_body_name></certification_body_name>
<certification_body_acronym></certification_body_acronym
<certification_additional_sites>
  <additional_site>
    <street></street>
    <city></city>
    <state></state>
    <zip_code></zip_code>
    <country></country>
    <scope></scope>
  </additional_site>
</certification_additional_sites>
<certification_standard_and_scheme>
  <standard_and_scheme>
    <scheme_name></scheme_name>
    <standard_name></standard_name>
  </standard_and_scheme>
</certification_standard_and_scheme>
</certification>
</ab_certs>
```

To learn more about Certification fields, click [here](#)

2. Once completed, go to the IAF CertSearch Data Import page
3. Choose how you would like to import your data
 - a. **File Upload** - Learn how to import data through File Upload
 - b. **FTP** - Learn how to import data through FTP
4. Once selected, click the **Continue** button (the system will initiate file and data processing)
5. If all the files and data are valid, the certificate will be successfully added to the existing Certified Entity record.

Note: If errors are encountered during the import process, go to [Error Handling](#).

(2) To add certification data to a new Certified Entity record

6. In your text editor, please enter the data into their corresponding tags.
7. Once completed, go to the IAF CertSearch Data Import page
8. Choose how you would like to import your data
 - a. **File Upload** - Learn how to import data through File Upload
 - b. **FTP** - Learn how to import data through FTP
9. Once selected, click the '**Continue**' button (*which initiates data validation*)
10. If all the files and data are valid, the Certified Entity and Certification records will be successfully added.

-> To view the added certifications go to the **Certification** listing page

-> To view the added certifications go to the **Certified Entity** listing page

Updating Certification Data from Excel file

TIPS: We recommend updating the same file you used to upload your data, that way you minimize import interruptions or errors.

To update certification data via Excel

1. In the Certificate Excel spreadsheet, look for the data that you want to update.

TIPS: Ensure that the Certified Entity Unique ID and the Certified Entity name match with the existing Certified Entity record.

Certified Entity Information

- Certified Entity Name (required)
- Certified Trading Name (optional)
- Certified English Name (optional)
- Certified Entity Street (required)
- Certified Entity City (required)
- Certified Entity State (optional)
- Certified Entity Country (required)
- Certified Entity Zipcode/Postcode (required)

Certificate Information - certificate issued to the Certified Entity

- Certificate Number (required)
- Certification Status (required)
- Certification Type (required)
- Certification Standards and Schemes (required)
- Certification Scope (optional)
- Certification Original Issue Date (optional)
- Certification Issue Date (required)
- Certification Expiry Date (required)

To learn more about Certification fields, click here

2. Once completed, go to the IAF CertSearch Data Import page
3. Choose how you would like to import your data
 - a. **File Upload** - [Learn how to import data through File Upload](#)
 - b. **FTP** - [Learn how to import data through FTP](#)
4. Once selected, click the **Continue** button (*which initiates the data validation process*)
5. If all the fields and data are valid, the certificate will be successfully added to the existing Certified Entity record.

Data Import Methods

This documentation provides an understanding of the different data import methods that you can use for importing your data into IAF CertSearch.

The Data Import feature is where you upload data, it is highly recommended for importing bulk data. It provides access to the manual and automated upload processes.

Data Import Methods

[File Upload](#)

[FTP](#)

[API Documentation](#)

File Upload

File Upload rules

Getting Started

File Upload is the process of transferring data from an external file via the IAF CertSearch's file uploader.

Pre-requisites:

Data formatted in an [Excel](#) or [XML](#) file

Average Transfer Speed: 30 secs ~ 2 mins, may vary depending on the data quality

Acceptable Formats: XLSX and XML

Recommended: Small, Medium and Large CBs that have anywhere between 20 to 100,000 certifications

How to import Certification data via File Upload

To import your data via File Upload:

1. go to 'Import Certification' page
2. Choose 'File Upload' as your data import
3. Select the files you want to update

NOTE: you can only upload 1 file format in 1 batch, uploading multiple file formats in 1 batch is not permissible. To learn more about the data import rules, click [here](#)

4. Click on the upload section to select the files from your local or drag and drop the files you want to upload.

Note: There is a maximum of 10 files per import batch, files that exceed the limit will not be included in the upload. To learn more about the upload limits, click [here](#)

5. Once selected, click the **Upload** button
6. In Step 2, the system initiates the data validation
7. Once validated, your data will successfully be added to IAF CertSearch

If errors are encountered during the data validation, read through the File Upload Rules to guide you in resolving the issues.

File Upload Rules

Limits	Description
Batch File Upload Limit	10 files per batch
File Size Limit	Maximum of 10k records
File Formats	XLSX or XML

FTP

Getting Started

FTP allows you to upload data in bulk from your server every 24 hours. This works for both Excel and XML formats. Users are required to set up an Active FTP connection and the filenames to be retrieved from the server.

Average Transfer Speed: 30 secs ~ 2 mins, may vary depending on the quality of the data

Acceptable Formats: XLSX and XML

Recommended: Small, Medium, and Large Certification Bodies that have anywhere between 20 to 50,000 certifications

Prerequisites

1. Set up an Active FTP Connection
 2. *In your FTP server, upload files (.xlsx or XML) with your [formatted data](#).*
 3. Define the filenames you want to retrieve from the server
-

How to import Certification data via FTP

1. go to '**Import Certification**' page
2. Choose '**FTP**' as your data import method
3. If an FTP connection is not yet added, you'll be asked to set it up
4. Fill out or edit the following text fields
 - FTP Access Status
 - **Active**, *continuously fetch/download the files from the FTP*
 - **Inactive**, *stops fetching /downloading the files from the FTP*
 - FTP Server Protocol
 - **FTP**, *relies on usernames and passwords for authentication*
 - **SFTP**, *uses SSH keys for authentication, which are much more secure*

- Server Host
- Server Port
- Server Username
- Server Password
 - If **SFTP** is selected, add the **Private Key**

1. To check if the FTP is successfully connected, click the '**Test FTP Connection**' button.
2. Once the FTP is connected, click the '**Save and Continue**' button.
3. In the next screen, add the file names you want to fetch from the FTP server
 - You can tick the '**Wildcard**' option if you have multiple files in the FTP directory to be fetched with a common naming convention

① Example:

The filename is **certs** and the 'Wildcard' option is ticked.

Then, the system will look for the following filenames in the directory:

- **certs_1.xlsx**
- **2_certs.xlsx**
- **3_certs_4.xlsx**

4. Once added, click the '**Fetch Data**' button
5. Once done, the process proceeds to **Step 2** where data validation is initiated
6. Once validated, your data will successfully be added to IAF CertSearch

API Documentation

This section allows you to integrate data through an API by generating an

API Key. To import data through API:

[Authentication](#)

[Requests](#)

[Responses](#)

[Errors](#)

[Accreditation Body APIs](#)

FTP Settings

Getting Started

In this section, you'll have the ability to manage your FTP Connections settings and the files you want to retrieve or *fetch* from your FTP server.

1. [Setting up an Active FTP Connection](#)
2. [Define the files that should be retrieved from the FTP](#)
3. [Fetch files for data import](#)
4. [View FTP Import Activities](#)

Setting up your FTP Connection Settings

1. Go to the **Import** page
2. From the navigation tab, click '**FTP Settings**'
3. Click the '**Edit**' button
 - **FTP Access Status**
 - **Active**, continuously fetch/download the files from the FTP
 - **Inactive**, stops fetching /downloading the files from the FTP
 - **FTP Server Protocol**
 - **FTP**, relies on usernames and passwords for authentication
 - **SFTP**, uses SSH keys for authentication, which are much more secure
 - Server Host
 - Server Port
 - Server Username
 - Server Password
 - If **SFTP** is selected, add the **Private Key**
1. To check if the FTP is successfully connected, click the '**Test FTP Connection**' button.
2. Once the FTP is connected, click the '**Save Changes**' button.

Once you are done setting up your FTP connection, the next step is to add the files you want to fetch or retrieve from the FTP servers.

Define the filenames

Defining or nominating the filenames is required so that IAF CertSearch can retrieve your data from your server into the IAF CertSearch database.

Prerequisite

Before defining the filenames, ensure that you have uploaded the files *that contain your formatted data* into the FTP server.

1. In the FTP Settings page, go to the **FTP File Names** section
2. Click, the **'Add FTP Filenames'** button
3. In the Add FTP File Name modal, add the filenames you want to retrieve.

 Make sure that your file names match the file names uploaded to your server.

- Supported characters for a filename are the following:
 - Alphanumeric characters: A-z, a-z, 0-9
 - Dashes (-)
 - Underscores (_)
 - Spaces ()
 - Forward slash, for subfolders support (/)
 - *example: ab_certs_1.xml, ab_certs_2.xlsx*
1. If you want to add more than 1 filename, click the **'+ Add FTP Filename'** button
 2. Once completed, click the **'Submit'** button

Fetch Files from FTP

Once the files are defined, you can either choose to:

- **Fetch the files right away**, which can be done by manually clicking the **'Fetch Files'** button
- **Fetch during the FTP crawl schedule** which starts at **UTC 01:00 am daily**.

Rules

- Any changes made to your file will be updated every 24 hours.
 - If the file names do not match, the system will not upload the file.
 - Fetching the files will be skipped if there is no filename in the FTP filename section.
-

FTP Data Import Activities

Allows you to see all the FTP import activities.

API Integration

This section allows you to integrate data through an API by generating an

API Key. To import data through API:

[Getting Started](#)

[Authentication](#)

[Requests](#)

[Responses](#)

[Errors](#)

[Accreditation Body APIs](#)

Global Mapping

This section guides you on how to manage your Global Mapping settings which include, Data Mapping and Field Mapping.

You'll have the ability to view and manage all your mapped fields and data on the Global Mapping page on their respective pages.

[Resolve Data Mapping Issues](#)

[Resolve Field Mapping Issues](#)

Field Mapping Rules

- Any unrecognized field names will not be recognized and require field mapping.

One (1) source field **CAN'T** be mapped to multiple target fields

- *In this example, Issue Date is mapped to Certification Issue Date and Certification Original Issue Date.*
 - **Issue Date** -> Certification Original Issue Date
 - **Issue Date** -> Certification Issue Date

Multiple source field values **CAN** be mapped to one (1) target field

- *In this example, Cert Status and Status are mapped to Certification Status.*
 - **Cert Status** -> Certification Status
 - **Status** -> Certification Status
- In Excel, renaming the sheet tab name is considered a field mapping issue

Data Mapping

The Data Mapping feature provides the ability to view and manage all your mapped data of all your import activities.

What is Data Mapping?

Data Mapping issues are caused when the data value from the source file does not match the required data value in the IAF CertSearch database, See the example below:

Source	The actual data value that exists from your source file, that is not recognized by the system.
Target	The data value defined in the IAF CertSearch database.

Tips:

To minimize data upload issues, we recommend you add data mapping before importing your data. This way you can eliminate interruption during the import process. To know more about adding data mapping, [click here](#)

View all your mapped data

1. Go to '**Import Certification**'
2. Click the '**Global Mapping**' tab
3. In the Data Mapping tab, you'll have access to all of your Mapped and Unmapped data from all of your import activities.
4. If you prefer to see a list filtered by a specific field, you can click through the navigation tab.
 - **Country** - All mapped and unmapped data related to the Country field
 - **Certification Type** - All mapped and unmapped data related to the Certification Type field

- **Standard** - All mapped and unmapped data related to the Standard field
- **Scheme** - All mapped and unmapped data related to the Scheme field
- **Certificate Status** - All mapped and unmapped data related to the Certificate Status field

Add Data Mapping

1. Go to '**Import Certification**'
 2. Click the '**Global Mapping**' tab
 3. In the Data Mapping tab, click the '**+ Add Data Mapping**' button
 4. Enter the value of the source data
 5. Select where you want to map the source data
 6. If you want to add multiple mapping:
 - Click the '**Add Data Mapping**' button
 7. Once done, click the '**Submit**' button
-

Edit Mapped Data

1. Go to '**Import Certification**'
2. Click the '**Global Mapping**' tab
3. In the Data Mapping tab list, look for the mapped data you want to edit.
4. Click the '**Actions**' button, then click '**View Details**'
5. In the Mapping Details modal, click 'Edit'
Update the fields you want to edit.
6. Once done, click the '**Save Changes**' button

Delete Mapped Data

1. Go to '**Import Certification**'
2. Click the '**Global Mapping**' tab
3. In the Data Mapping tab list, look for the mapped data you want to edit.
4. Click the '**Actions**' button, then click '**Delete Mapping**'
5. A delete confirmation modal should appear, click 'OK'
6. Once done, your mapped data should be deleted from your Data Mapping list./

Field Mapping

This section guides you on how to manage your Global Mapping settings which includes, Data Mapping and Field Mapping.

You'll have the ability to view and manage all your mapped fields and data on the Global Mapping page on their respective pages.

[Resolve Data Mapping Issues](#)

[Resolve Field Mapping Issues](#)

ⓘ Tips:

To minimize data upload issues, we recommend you add data mapping before importing your data. This way you can eliminate interruption during the import process. To know more about adding data mapping, click [here](#)

View all your mapped fields

1. Go to **'Import Certification'**
2. Click the **'Global Mapping'** tab
3. In the Field Mapping tab, you'll have access to all of your Mapped and Unmapped fields from all of your import activities.

Add Field Mapping

1. Go to **'Import Certification'**
2. Click the **'Global Mapping'** tab
3. In the Data Mapping tab, click the **'+ Add Field Mapping'** button

4. Enter the value of the source data
5. Select where you want to map the source data
6. If you want to add multiple mapping:
 - Click the **'Add Field Mapping'** button
7. Once done, click the **'Submit'** button

Edit Mapped Data

1. Go to **'Import Certification'**
2. Click the **'Global Mapping'** tab
3. In the Field Mapping tab list, look for the mapped data you want to edit.
4. Click the **'Actions'** button, then click **'View Details'**
5. In the Mapping Details modal, click 'Edit'
6. Update the fields you want to edit.
7. Once done, click the **'Save Changes'** button

Delete Mapped Data

1. Go to **'Import Certification'**
2. Click the **'Global Mapping'** tab
3. In the Field Mapping tab list, look for the mapped data you want to edit.
4. Click the **'Actions'** button, then click **'Delete Mapping'**
5. A delete confirmation modal should appear, click 'OK'
6. Once done, your mapped data should be deleted from your Field Mapping list.

Field Mapping Rule

Any unrecognized field names will not be recognized and require field mapping.
One (1) source field **CAN'T** be mapped to multiple target fields

- *In this example, Issue Date is mapped to Certification Issue Date and Certification Original Issue Date.*
 - **Issue Date** -> Certification Original Issue Date
 - **Issue Date** -> Certification Issue Date

Multiple source fields values **CAN** be mapped to one (1) target field

- *In this example, Cert Status and Status are mapped to Certification Status.*
 - **Cert Status** -> Certification Status
 - **Status** -> Certification Status
- In Excel, renaming the sheet tab name is considered a field mapping issue

Import Activities

This page provides the ability to show all the import activities within your account. Here, you can view the following information:

- Filename
- Status
- Details
- Import Method
- Uploaded At
- Import Started
- Import Completed

Import Settings

This section provides the ability to manage your default import settings.

Automatically import data, and skip data with errors

If checked, the system processes your data without interruptions. The valid data will be automatically imported and the invalid data will be skipped.

If unchecked, the system requires you to resolve the issues before the data is processed for importing.

Please note that the configurations made within the Import Settings page serve as a default setting for all your file upload activities. Should you wish to change the settings in every activity you may change the settings in **Step 1** of the batch file upload.

Error Handling

Error Handling

This documentation guides you in handling data import errors.

In this section:

[Field Mapping Issues](#)

[Field Check Issues](#)

[Data Mapping Issues](#)

[Data Check Issues](#)

Resolve Field Mapping Issues

The Field Mapping issue may appear during the initial data validation process, which always takes place after selecting the files you want to upload (**Step 2 of data import**)

To Resolve Field Mapping Issues

1. Click the '**Field Mapping**' from the validation navigation within the data import process:
2. Once clicked, a list of all the fields that are unrecognized by the system is listed in the main content area.
3. In the field mapping list, you're provided with the error details such as:

Displaying the Sheet Name is only applicable to Excel files.

Under the Target column, search or select the Field Name you want to map your source field to.

Sheet Name	Sheet tab where the error is seen.
Source	The actual field name that exists from your source file, that is not recognized by the system.
Target	The field name defined in the IAF CertSearch database.

1. Once selected, click the '**Apply Field Mapping**' button to ensure that the mapped fields are submitted.
2. Once done, the system will continue validating your data. To learn more about the Data Validation Process, [click here](#).
3. If all data is valid, your data will be successfully imported.

Resolve Field Check Issues

How to resolve Field Check Issues?

1. In Step 2 of the validation process, under the Field Check navigation, click on the files listed that encountered the field check issue.
2. Read the error message and go to your Spreadsheet or XML to add the missing required field.
3. Save your file (ensure that you are uploading the same file)
4. Click the re-upload button so the system can proceed with validating the data.
5. If all data is valid, your data will be successfully imported.

What is Field Check?

Field check is a validation process where the system checks for the required fields and sheets for Excel and missing required elements in XML.

The Fields Check issue may appear during the initial data validation process, which always takes place after selecting the files you want to upload.

For Excel

1. **Keep the format and the order of the fields and sheets** of the provided template. **Do not REMOVE** any of the fields or sheets.
2. Avoid adding unnecessary fields to the original format, for faster data processing.

If the system checks that the required fields or sheets are missing from the Excel file, the import process will be interrupted with a field check error.

For XML

1. **Keep the format and the order of the XML elements** of the provided template. **Do not REMOVE** any of the elements.
2. Avoid adding unnecessary XML tags, attributes or elements to the original format

If the system checks that the required tags, attributes or elements are missing from the XML file, the import process will be interrupted with a field check error.

Resolve Data Mapping Issues

The Data Mapping issue may appear during the initial data validation process, which always takes place after selecting the files you want to upload (Step 2 of data import)

To Resolve Data Mapping Issues

1. Click the **'Data Mapping'** from the validation navigation within the data import process:
2. Once clicked, a list of all the fields that are unrecognized by the system is listed in the main content area.

Field Name	Field Name where the data error is seen.
Source	The actual data value that exists from your source file, that is not recognized by the system.
Target	The data value defined in the IAF CertSearch database.

3. Under the Target column, search or select the dataset you want to map your source data to.
4. Once all data mapping issues are resolved, click the **'Apply Data Mapping'** button to ensure that the mapped data are submitted.
5. Once done, the system will continue validating your data.
6. If all data is valid, your data will be successfully imported.

Resolve Data Check Issues

The Data Check issue may appear during the initial data validation process, which always takes place after selecting the files you want to upload.

What is Data Check?

Data check is a validation process where the system checks your data for the following issues:

- Missing required data
- Data duplication
- Data inconsistencies
- Data discrepancies
- Invalid data

To Resolve Data Check Issues

Click the **'Data Check'** from the validation navigation within the data import process:

Once clicked, a list of all the fields that are unrecognized by the system is listed in the main content area.

Sheet Tab	Sheet tab of where the error is seen
Field Name	Field Name of where the error is seen.
Row	Row Number of where the error occurs
Data Value	Data value from the source file
Error	Error description
Suggestion	Suggestion how to resolve the error

Settings

Accounts

When you activate an Accreditation Body account, a Head Quarters (HQ) account is created automatically.

The HQ account serves as the master account where you have the ability to manage your AB profile information, users and accounts.

The screenshot shows the IAF Accounts management interface. The top navigation bar includes the IAF logo, a search bar for company names, and a user profile icon labeled 'CM'. The left sidebar contains navigation options: 'DATA MANAGEMENT', 'Import Certification Body', 'MESSAGES', 'Enquiries', 'SETTINGS', 'Accounts', and 'Users'. The main content area is titled 'Accounts | 1' and includes an '+ Add Account' button. Below this, there are instructions on how to create multiple accounts and links for 'How to add another branch/account', 'How to change account details', and 'How to change email address?'. A table below shows the list of accounts with columns for Status, Account, Location, Updated at, Created at, and Actions. The table contains one entry: 'Accreditation Test Account (HQ)' with status 'Active', location 'Australia', and creation/update dates of '2023-08-13'. A red box highlights the account name.

Status	Account	Location	Updated at	Created at	Actions
Active	Accreditation Test Account (HQ)	Australia	2023-08-13	2023-08-13	View

Prerequisite:

Only the Head Quarter Account (HQ) can add and edit the Accounts The invited account holder must activate via the Activation Link

Add Accounts

Under Accounts, it is possible to create another **AB Sub Account**.

Sub Accounts are ideal for ABs that have subsidiaries or in different locations or scheme focus.

To add an Account:

1. go to the Accounts page
2. Click the Add Account button
3. You'll be redirected to an Add Account form

Account Details Fields

Location

Note: City, State and Country will appear on the live profile, the full address will be private.

- Country (required)
- Bldg No. / Floor No. / Street (required)
- City (required)
- State (optional)
- Postcode / Zipcode (required)

Account Information

The Account Name will appear in the enquiry form on the live profile and the enquiry will be sent to the email below.

- Account Name (required)
- Account Email (required)
- Key Contact Name (required)
- Account Website (optional)

4. Once completed, click the Submit button
5. The additional Account is now added to your Accounts list
6. An activation link will be sent to the Account

Update Account Details

To update the account details:

1. go to the Accounts page, look for the account you want to update
2. Under the actions column, click the **View** button
3. Click the **Edit** button
4. Look for the information you want to update

Account Details Fields

Location

Note: City, State and Country will appear on the live profile, the full address will be private.

- Country (required)
- Bldg No. / Floor No. / Street (required)
- City (required)
- State (optional)
- Postcode / Zipcode (required)

Account Information

The Account Name will appear in the enquiry form on the live profile and the enquiry will be sent to the email below.

- Account Name (required)
- Account Email (required)
- Key Contact Name (required)
- Account Website (optional)

5. Enter the updated information in its respective input fields.
6. Once completed, click the **Save Changes** button
7. The account information is now successfully updated

Users

Here you can manage the users who access your account. In the Users area, you can see the users that belong to this Account. In the User area, you can view, or invite new users.

To view the users, click '**Users**' in the left-hand navigation. Here, you'll see the users list with their information such as Status, Roles, Updated at and Created at.

Invite User

To invite another user to access your account:

1. Click '**Users**' in the left-hand navigation.
2. Click the '**Invite User**' button
3. In the popup window, Input the email address and the role of the user
4. Once invited, an invitation to activate the IAF CertSearch account will be sent to the recipient.

Delete User

1. Click '**Users**' in the left-hand navigation.
2. Search for the user you want to delete.
3. Under the actions column, click the More button
4. Click the 'Delete' button
5. Once deleted, the user will no longer have access to your IAF CertSearch account.

Accreditation Body Profile

The HQ account serves as the master account where you have the ability to manage your AB profile information, users and accounts.

View AB Profile

To view your AB Profile information:

1. go to Accreditation Body Profile
2. On the AB profile page, you'll have access to the following information:

Accreditation Body Profile

Public Information

Information that can be seen in the public through the AB public profile)

- Accreditation Body Logo (optional)
- Accreditation Country / Economy (required)
- Accreditation Body Name (required)
- Accreditation Body Acronym (required)
- Accreditation Body Website (required)
- Accreditation Body Phone
- Accreditation Body Fax
- Accreditation Body Description (required)

Private Information

Information that can be seen in the public through the AB public profile)

- Key Contact Name (required)
- Accreditation Body Email Address (required)

Update AB Profile

To update your AB Profile information:

1. go to Accreditation Body Profile
2. On the AB profile page, you'll have access to the following information:

Accreditation Body Profile

Public Information

Information that can be seen in the public through the AB public profile)

- Accreditation Body Logo (optional)
- Accreditation Country / Economy (required)
- Accreditation Body Name (required)
- Accreditation Body Acronym (required)
- Accreditation Body Website (required)
- Accreditation Body Phone
- Accreditation Body Fax
- Accreditation Body Description (required)

Private Information

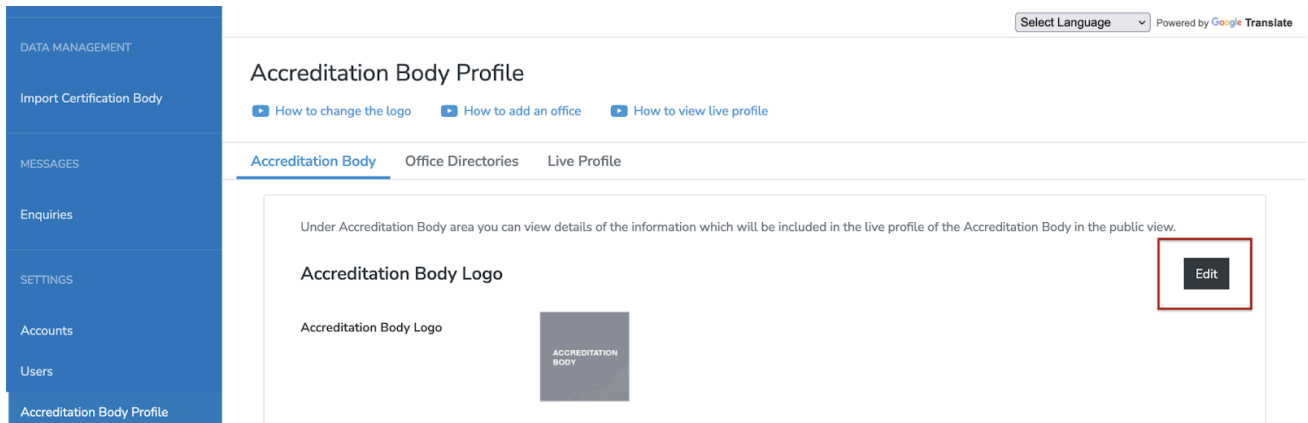
Information that can be seen in the public through the AB public profile)

- Key Contact Name (required)
- Accreditation Body Email Address (required)

3. Look for the information you want to update the click the **Edit** button
4. Once updated, click the **Save Changes** button
5. Your AB profile information is now successfully updated.

Add or Update AB Logo

1. To add or update the AB Logo, click the **Edit** button



The screenshot shows a web interface for managing an Accreditation Body Profile. On the left is a blue sidebar with navigation options: DATA MANAGEMENT (Import Certification Body), MESSAGES (Enquiries), and SETTINGS (Accounts, Users, Accreditation Body Profile). The main content area is titled 'Accreditation Body Profile' and includes three links: 'How to change the logo', 'How to add an office', and 'How to view live profile'. Below these are tabs for 'Accreditation Body', 'Office Directories', and 'Live Profile'. The 'Accreditation Body' tab is active, displaying a section for the 'Accreditation Body Logo'. A placeholder image is shown with the text 'ACcredITATION BODY' and a small 'Edit' button is highlighted with a red box.

2. Click the **Browse** button
3. A modal pops up where you select the image you want to use as the logo
4. Once selected, click the **Save Changes** button
5. Your logo will now be successfully added to your AB profile.

Settings

The Settings feature provides the ability to manage your user information, passwords, login authenticators and notifications.

User Settings

Where you can manage your user photo and your basic information such as First Name, Last Name, Mobile Number, Occupation and daily search frequency. To manage your user settings, click [here](#).

Security Settings

Where you can manage your password and login authenticators and view your activities. To manage your security settings, click [here](#).

Notification Settings

Where you can manage your notifications for different updates either via email or through alert notifications. To manage your notifications settings, click [here](#).

User Settings

To view your User Settings, from the Dashboard click '**Settings**' in the left-hand navigation. Here, you can view your user role, email address, user photo, and user information.

Add or Edit User Photo

To add or change your user photo

1. From the Dashboard, click '**Settings**' in the left-hand navigation
2. Click '**Edit**' in the User Photo section
3. In the popup window, click '**Choose File**' to select an image that you want to use.
4. Zoom and Rotate functions are also available to properly adjust the user image.
5. Click the '**Save Changes**' once done or click Cancel to revert changes

Edit User Information

To edit your user information:

1. From the Dashboard, click '**Settings**' in the left-hand navigation.
2. Click '**Edit**' in the User Information section
3. Update the fields you want to change
4. Once done, click the '**Save Changes**' button

Please note: any information added within this section remains private and will not be accessed by the public.

Notification Settings

This feature allows you to customize the Notifications you will receive and how often you receive notifications.

Take note that if you turn off all notifications you will still receive important administrative emails such as password resets.

Alert Notifications

General Alerts

- Enquiry Updates - Alerts you on New Enquiries, Updates, and Activities

Data Management

- File Upload - Alerts you on File Uploads, Upload Status, and Error Logs
- FTP Upload - Alerts you on File Uploads, Upload Status, and Error Logs

Email Notifications

General Alerts

- Enquiry Updates - Alerts you on New Enquiries, Updates, and Activities

Data Management

- File Upload - Alerts you on File Uploads, Upload Status, and Error Logs
- FTP Upload - Alerts you on File Uploads, Upload Status, and Error Logs

Manage Notifications

To manage your notifications, just click on the toggle button per notification type:

notification is **ENABLED**

notification is **DISABLED**

Security Settings

To view your Security Settings, from the Dashboard click 'Settings' in the left-hand navigation. In the navigational tab, click "Security Settings"

Here, you can change your password, set up your login authenticators and view your activities.

Change Password

To change your password:

1. Click '**Settings**' in the left-hand navigation.
2. Click '**Security Settings**' in the navigational tab.
3. Click the '**Change Password**' button
4. In the pop-up window, type in the old password, new password, and confirm password. Ensure that the new password and the confirmed password match.
5. Once completed, click the '**Confirm**' button.
6. You have now successfully changed your password.

2-Factor Authentications

Please note: Email guard authenticator is always required. If you happen to enable the Google Authenticator you'll just have an option which authenticator you want to use during login.

To manage your Google Authenticator:

1. You will first need to download a Google Authenticator on your mobile to use this feature.
2. From the Dashboard, click '**Settings**' in the left-hand navigation.
3. Click '**Security Settings**' in the menu bar.
4. Click the toggle button to enable the Google Authenticator
5. A pop-up window will appear with a QR code.

6. In your Google Authenticator app, add IAF CertSearch by scanning the QR code.
7. Once scanned click the '**Continue**' button
8. In the next screen, you will be asked to input the code that is generated from the Google Authenticator app.
9. Once added, click '**Confirm**'
10. The Google Authenticator app is now successfully enabled and is activated every time you log in to IAF CertSearch.

IAF CertSearch Data Structure

Templates

IAF CertSearch requires the AB to download the provided templates to successfully import their data into the IAF CertSearch database.

CB Data Templates

To download the CB **Excel** Data Templates:

1. Under Data Management, go to the Import Certification Body page
2. In Download Data Templates, click the '**Excel Template**' button

Related Articles

- [Learn the Excel General Guides](#)
 - [Manage CB Data from Excel](#)
-

To download the CB **XML** Data Templates:

1. Under Data Management, go to the Import Certification Body page
2. In Download Data Templates, click the '**XML Template**' button

Related Articles

- [Learn the XML General Guides](#)
- [Manage CB Data from XML](#)

Certification Fields Glossary

This section lists down all certification data fields added in the certification templates.

Certifications

Field Name	Requirement	Description	Text
Certification Identity Number	Mandatory	Unique identifier for a specific certificate. Used as a reference or a tracking number to look up certificate records in the IAF CertSearch database.	<i>AXB1234</i>
Certificate Number	Mandatory	Unique identifier for a specific certificate. Format of certificate numbers may vary depending on the type of certificate and the Certified Entity issuing it.	<i>20897-A01</i>
Certification Status	Mandatory	Current standing of the Certified Entity's certification. Certificate status dataset: active, inactive, hidden, cancelled, withdrawn, cbwithdrawn, suspended, pending, deleted, or expired	<i>Active</i>
Accreditation Status	Mandatory	Current standing of the CB's accreditation status. -> Accreditation statuses: active, withdrawn, suspended	<i>Active</i>

Certification Type	Mandatory	Refers to the main scope of the certificate	<i>Management Systems</i>
Certification Scope	Optional	Specific description of the products, services, processes, or activities for which the Certified Entity has been granted certification.	<i>Manufacturing, marketing and export of instruments, consumables and accessories for temperature, active oxygen, hydrogen, carbon measurements and sampling in ferrous and non-ferrous melts</i>
Certification Original Issue Date	Optional	Date on which the certificate was first issued or granted to the Certified Entity	<i>20191120</i>
Certification Issue Date	Mandatory	Date on which the certificate was officially issued or granted	<i>20211123</i>
Certification Expiry Date	Mandatory	Date on which the validity of the certificate will come to an end.	<i>20251123</i>
Certified Entity Name	Mandatory	Name of the Certified Entity, individual, product, or service that has been granted certification.	<i>Test Food And Logistics Inc.</i>
Certified Entity Trading Name	Optional	A trade name, trading name, or business name is a pseudonym frequently used by companies to operate under a name different from their registered, legal name. In a number of countries, the phrase "trading as" (abbreviated to t/a) is used to designate a trade name.	<i>Test Food</i>

Certified Entity English Name	Optional	English name of the Certified Entity, individual, product, or service that has been granted certification.	<i>Test Food And Logistics Inc.</i>
Certified Entity Unique ID	Mandatory	Unique identifier for a specific Certified Entity. Used as a reference or a tracking number to look up Certified Entity records in the IAF CertSearch database.	<i>UNIQUEID-COMPANY01</i>
Certified Entity Street	Optional	Main address of the certified entity.	<i>S108/39 E Esplanade</i>
Certified Entity City	Optional	City of the main address of the certified entity.	<i>Sydney</i>
Certified Entity State	Optional	State of the main address of the certified entity.	<i>New South Wales</i>
Certified Entity Zipcode/Postcode	Optional	Zipcode/Postcode of the main address of the certified entity.	<i>2095</i>
Certified Entity Country/Economy	Mandatory	Country/Economy of the main address of the certified entity.	<i>Australia</i>
Certification Body Identity Number	Mandatory	Unique identifier for a specific CB. Used as a reference or a tracking number to look up CB records in the IAF CertSearch database.	<i>AB01CB00001</i>
TAX ID	Optional	Tax ID or VAT number of the Entity	
Company ID Number	Optional	Company ID Number of the Entity	
Business Registration	Optional	Business Registration Number of the Entity	

Number			
Certification Body Name	Mandatory	Name of the Certification Body	<i>United Kingdom Accreditation Service</i>
Certification Body Acronym	Mandatory	Acronym of the Certification Body	<i>UKAS</i>

Certification Additional Site

Field Name	Requirement	Description	Text
Certification Identity Number	Mandatory	Unique identifier for a specific certificate. Used as a reference or a tracking number to look up certificate records in the IAF CertSearch database.	<i>AXB1234</i>
Additional Site Street	Optional	Main address of the certified entity.	<i>S108/39 E Esplanade</i>
Additional Site City	Optional	City of the main address of the certified entity.	<i>Sydney</i>
Additional Site State	Optional	State of the main address of the certified entity.	<i>New South Wales</i>
Additional Site Zipcode/Postcode	Optional	Zipcode/Postcode of the main address of the certified entity.	<i>2095</i>
Additional Site Country/Economy	Mandatory	Country/Economy of the main address of the certified entity.	<i>Australia</i>
Additional Site Scope	Optional	Specific description of the products, services, processes, or activities for which the additional site has been granted certification.	<i>Design, Development, Manufacture and Services of Chemical Products, Detergent and Softeners</i>

Certification Standard and Scheme

Field Name	Requirement	Description	Example
Certification Identity Number	Mandatory	Unique identifier for a specific certificate. Used as a reference or a tracking number to look up certificate records in the IAF CertSearch database.	<i>AXB1234</i>
Scheme Name	Mandatory	Specific certification program or framework to which the certificate relates.	<i>Quality Management Systems Scheme</i>
Standard Name	Mandatory	Specific set of criteria, requirements, or guidelines that the certified entity has been assessed against and found to be in compliance with	<i>ISO 9001:2008</i>

Certification Body Fields Glossary

Certification Bodies

Field Name	Requirement	Description
Certification Body Identity Number	Mandatory	Unique identifier for a specific CB. Used as a reference or a tracking number to look up CB records in the IAF CertSearch database. <i>Example: AB01CB00001</i>
Certification Body Name	Mandatory	Name of the Certification Body <i>Example: Global Compliance Plus Pty Ltd.</i>
Certification Body Acronym	Mandatory	Acronym of the Certification Body <i>Example: GCP</i>
Website	Mandatory	Website of the certified entity. Must be http:// or https:// <i>Example: http://testfoodlogistics.com/</i>
Key Contact	Mandatory	Key Contact from the Certification body <i>Example: Peter Jackson</i>
Email Address	Optional	A generic email is preferred, if personal email the AB must have consent to pass it on for the purpose of IAF CertSearch. <i>Example: peterj@GlobalCompliance.test</i>

Phone	Optional	<u>Certification Body Phone number.</u> <u>Include any country and area codes.</u> <u>Example: + 61 2 8453 1100</u>
Fax	Mandatory	<u>Certification Body Fax number</u> <u>Example: + 61 2 8453 1100</u>
Country/Economy	Mandatory	Country/Economy of the main accredited entity address <u>Example:Australia</u>
Description	Mandatory	A general description of the Certification Body. The description will be on the profile page of the IAF CertSearch describing the organization. If the AB does not have this information then leave it blank, the CB will have the ability to edit the description in their IAF CertSearch dashboard.

Office Directories

Field Name	Requirement	Description
Certification Body Identity Number	Mandatory	<p>Unique identifier for a specific CB. Used as a reference or a tracking number to look up CB records in the IAF CertSearch database.</p> <p>Example: AB01CB00001</p>
Office Type	Mandatory	<p>There are four options to choose from:</p> <ul style="list-style-type: none"> • Corporate Head Office(Main accredited entity office) • Regional Head Office • Country Head Office • Branch Office
Street	Mandatory	<p>Street of the main address of the certified entity.</p> <p>Example: S108/39 E Esplanade</p>
City	Optional	<p>City of the main address of the certified entity.</p> <p>Example: Sydney</p>
State	Optional	<p>State of the main address of the certified entity.</p> <p>Example: New South Wales</p>
Country/Economy	Mandatory	<p>Country/Economy of the main address of the certified entity.</p> <p>Example: Australia</p>

Zipcode/Postcode	Optional	Zipcode/Postcode of the main address of the certified entity. Example: 2095
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Standards & Schemes

Field Name	Requirement	Description
Certification Body Identity Number	Mandatory	Unique identifier for a specific CB. Used as a reference or a tracking number to look up CB records in the IAF CertSearch database. Example: AB01CB00001
Scope Type	Mandatory	Refers to the main scope of the certificate Example: Management System
Scheme/Program	Mandatory	Specific certification program or framework to which the certificate relates. Example: Quality Management Systems Scheme
Certification Standard Code	Mandatory	Specific set of criteria, requirements, or guidelines that the certified entity has been assessed against and found to be in compliance with Example: ISO 9001
Accreditation First Issue Date	Optional	Date on which the certificate was first issued or granted to the Certified Entity Example: 20191120
Accreditation Issue Date	Mandatory	Date on which the standard was officially issued or granted Example: 20230123
Accreditation Expiry Date	Mandatory	Date on which the validity of the standard will come to an end. 20260123

Technical Sectors

Field Name	Requirement	Description
Certification Body Identity Number	Mandatory	Unique identifier for a specific CB. Used as a reference or a tracking number to look up CB records in the IAF CertSearch database. Example: AB01CB00001
Scope Type	Mandatory	Refers to the main scope of the certificate Example: Management System
Scheme/Program	Mandatory	Specific certification program or framework to which the certificate relates. Example: Quality Management Systems Scheme
Sector/IAF Code Title	Mandatory	Refers to a specific area or industry that is covered by accreditation and conformity assessment activities. Example: Agriculture, forestry and fishing
Sector/IAF Code	Mandatory	Code assigned to the sectors. Example: 01
All Sectors	Mandatory	Insert "1" if the scheme covers "All Sectors" otherwise insert "0" and enter the sector in column E [Sector/IAF Code Title] and the [Sector/IAF Code] in column F.

Certification Body Countries

Field Name	Requirement	Description
Certification Body Identity Number	Mandatory	Unique identifier for a specific CB. Used as a reference or a tracking number to look up CB records in the IAF CertSearch database. Example: AB01CB00001
Country/Economy	Mandatory	Country/economy in which the certification body is eligible to issue accredited certificates Example: Australia

END