IAF CertSearch User Guide

For Certification Bodies - v 1.1

English

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Getting Started

Overview

Intended Audience

This documentation is intended for the Certification Bodies that are accredited by an IAF MLA signatory member Accreditation Body under the

This document 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.

Getting Started

Activation

Learn about the IAF CertSearch Data Structure

Certification Templates

Certification Fields Glossary

Data Management

- Certified Entities
- Certifications
- Standards and Schemes
- Data Import

Settings

- Settings
- Security Settings
- Notification Settings
- Data Import

Activation

Prerequisite

You should be a **Certification Body** (CB) that is accredited by an IAF MLA signatory member Accreditation Body under the main scope ISO/IEC 17021-1.

The activation link to activate your IAF CertSearch CB account should be provided by your AB. Should you wish to create a CB account, please contact either

Activating your CB Account

To activate your CB account:

1. Contact your AB to get your activation link
2. Once received, access the activation link from your browser
    a. The activation link expires in **4 months** upon generation
    b. if the link already expired, request a new link to your respective ABs.
3. Read the Terms and Conditions, Privacy Policy, and Data Management Provisions, then check the tick boxes.
4. Once agreed, fill up the necessary information

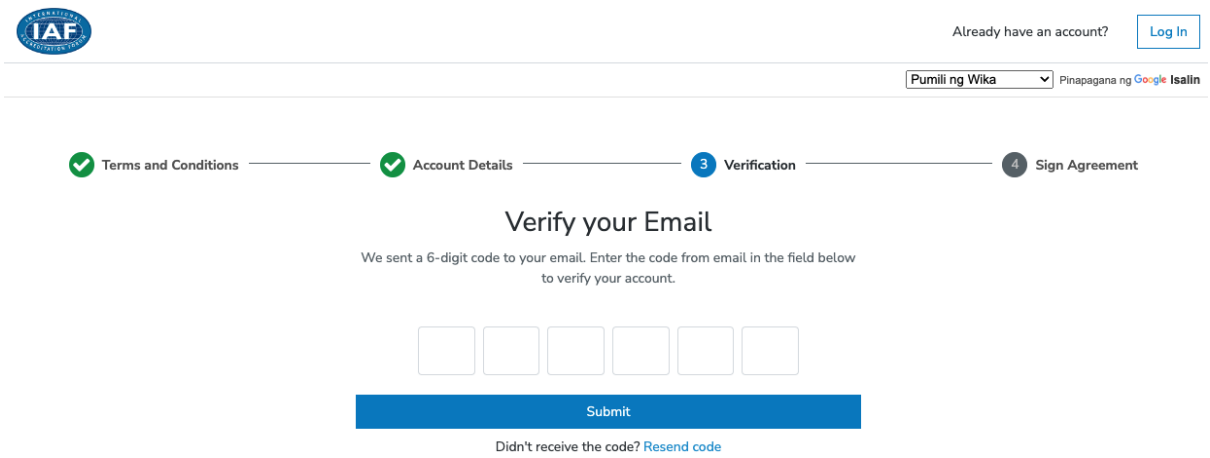
Activation Form

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

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 done, submit the signature of the representative or your organization
9. Once completed, click the Submit button
10. You'll be redirected to a Success page, click 'Get Started' to proceed to your account dashboard.

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 Certificates
- Manage Security Settings

Data Management

Certified Entities

The Certified Entities provide access to the Certified Entities uploaded by the CB. The certification data is collected and imported by the CB through Manual Data Entry, File Upload, FTP or API.
This page provides the ability to view and manually manage the Certified Entity data.

Certified Entities

To view the Certified Entities list, click 'Certified Entities' from the left-hand navigation.

This page includes the following information:

Column Name	Description
Certified Entity Unique ID	*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.*
Certified Entity	*Name of the Certified Entity*
Country	*Country where the Certified Entity is located*
Confidential Certified Entity	*Permission to access the Certificate Information in public, where value can either be:* ● *Confidential, limits the certification details to the public* ● *Non-Confidential, allows public access to the certification details*
Certifications	*Number of certificates issued to the Certified Entity*
Updated at	*Date the certified entity data was last updated*
Created at	*Date the certified entity record was created*

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.

View and Manage Individual Certified Entity

Note: Adding Certified Entity data requires Certificate Information.

- Certified Entity Detail Page
- Updated Certified Entity
- Add Certificate to a Certified Entity
- Add Certified Entity

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

Certified Entity Detail Page

View the Certified Entity detail page

1. In the Certified Entities listing page, search for the Certified Entity name you want to view
2. To view the Certified Entity detail page you can either click on the:
    - **Certified Entity name**
    - '**Actions**' button
        - then, click **'View Details'**
3. Once done, you'll be redirected to the Certified Entity page, where you'll have access to the Certified Entity **Details** and its **Certificates**.

Certified Entity Details

This section provides the ability to view and manage the Certified Entity details such as:

Certified Entity Information

Company Information

- Company Name (required)
- Company Trading Name (optional)
- Company English Name (optional)
- TAX ID (optional)
- Company ID Number (optional)
- Business Registration Number (optional)
- Confidential Certified Entity (optional)

Location Information

- Certified Entity Country (optional)
- Certified Entity Street (required)
- Certified Entity City (required)
- Certified Entity State (optional)

- Certified Entity Zipcode/Postcode (required)

System Information

Data added to the system information serves as the identifiers of the certified entity record which can be used as a reference for updating data during data import.

- Company Name (required)
- Certified Entity Unique ID (required)

Recommendations:

We recommend keeping or maintaining 1 Certified Unique ID assigned to 1

Manage the Certified Entity Details

- Edit Certified Entity
- Add Certificate

Certificates

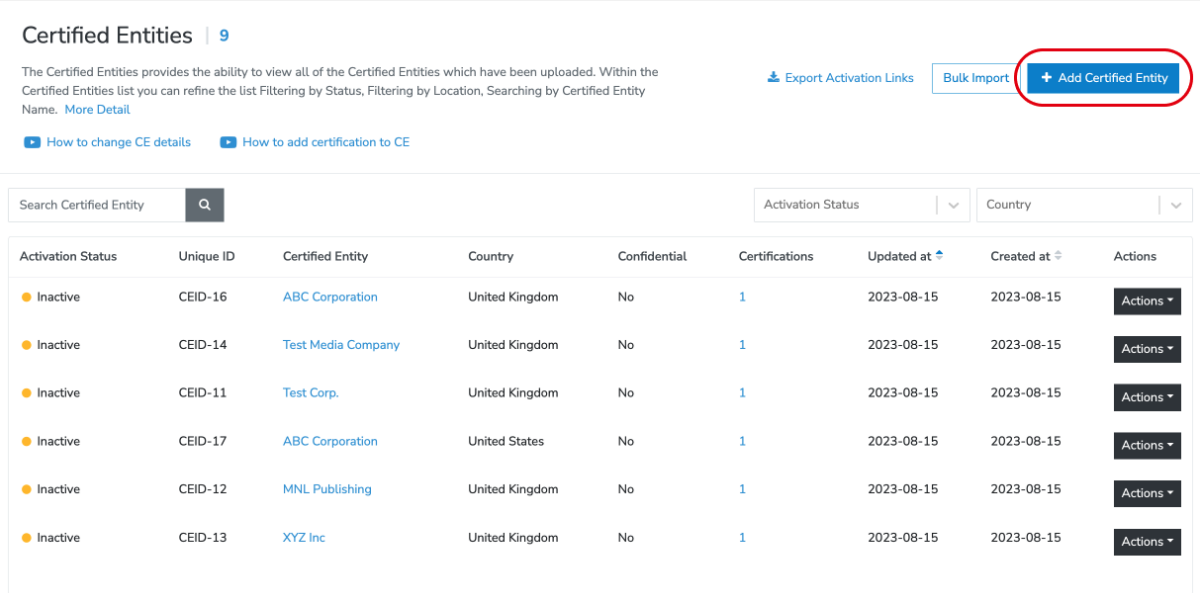
This section provides the ability to view and manage the certificates issued to the Certified Entity, which includes:

- Certificate Status
- Certificate Number
- Standard
- Confidential
- Expiry Date
- Accreditation Body
- Certified Entity
- Site Location
- Updated at

Add Certified Entity

To manually add a Certified Entity

1. On the Certified Entities listing page, click the Add Certified Entity button



2. 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

- Company Name (required)
- Company Trading Name (optional)
- Company English Name (optional)
- TAX ID (optional)
- Company ID Number (optional)
- Business Registration Number (optional)
- Confidential Certified Entity (optional)

Location Information

- Certified Entity Country (optional)
- Certified Entity Street (required)

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

System Information

Data added to the system information serves as the identifiers of the certified entity record which can be used as a reference for updating data during data import.

- Company Name (required)
- Certified Entity Unique ID (required)

Certificate Information

Certificate Information

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

Public Information

- Accreditation Body (required)
- Certificate Number (required)
- Certification Type (optional)
- Certification Standard and Scheme (required)
- Certification Scope (optional)

Certificate Issuance Details

- Certificate Original Issue Date (optional)
- Certificate Issued Date (required)
- Certificate Expiry Date (required)

Certification Additional Sites (optional data)

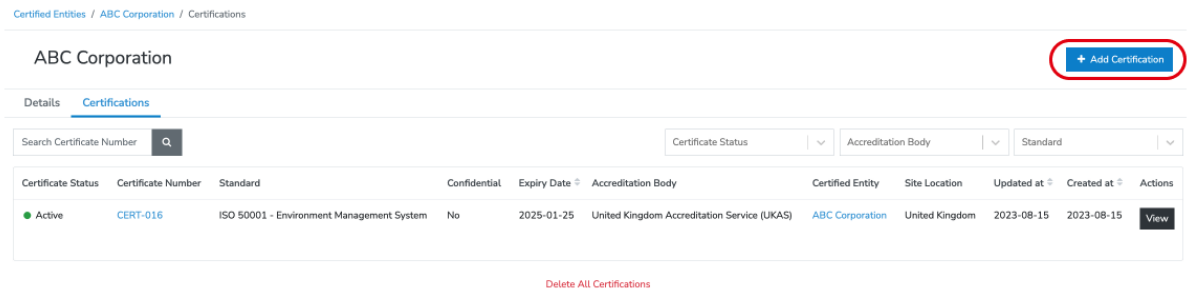
- Certified Entity Country (optional)
- Certified Entity Street (optional)
- Certified Entity City (optional)
- Certified Entity State (optional)
- Certified Entity Zipcode/Postcode (optional)

3. Once completed, click the 'Submit' button
4. If all data is valid, the Certified Entity and its certificate information will be successfully added.

Add Certificate

To manually add a certificate to an existing Certified Entity

1. On the Certified Entities listing page, click the Certified Entity to which you want to add the certificate.
2. On the **Certified Entity detail page**, click the **Certifications** tab
3. Click the **Add Certificate** button



Adding a certificate to an existing Certified Entity

4. Enter the Certificate information:

Certificate Information

Certificate Information

- Certification Status (required)
- Accreditation Body (required)
- Certificate Number (required)
- Certification Type (required)
- Certification Standard and Scheme (required)
- Certification Scope (optional)

Certificate Issuance Details

- Certificate Original Issue Date (optional)
- Certificate Issued Date (required)
- Certificate Expiry Date (required)

Certification Additional Sites (optional data)

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

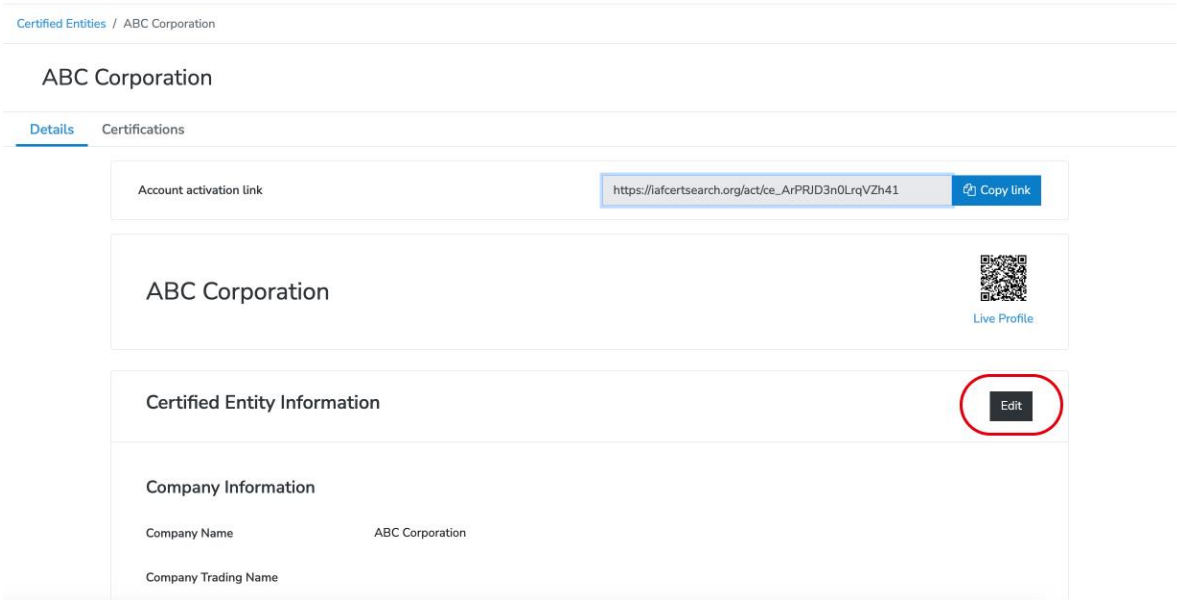
5. Once completed, click the '**Submit**' button
6. If all data is valid, the certificate will be successfully added to the Certified Entity

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

Edit Certified Entity

To manually update Certified Entity information:

1. On the Certified Entities listing page, search for the Certified Entity you want to update
2. Click the **'Certified Entity'** name
3. In the Certified Entity detail page, click the 'Edit' button



Edit Certified Entity Information

4. Go to the input fields you want to update:

Certified Entity Information

Company Information

- Company Name (required)
- Company Name (optional)
- Company English Name (optional)
- TAX ID (optional)
- Company ID (optional)
- Business Registration Number (optional)
- Confidential Certified Entity (optional)

Location Information

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

- Once updated, click the 'Save Changes' button
- If all data is valid, the Certified Entity data will be successfully updated

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.

> **Note:** Adding Certification data requires Certified Entity Information.

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	*Current standing of the Certified Entity's certification.* *Certificate status dataset: active, inactive, hidden, cancelled, withdrawn, cbwithdrawn, suspended, pending, deleted, or expired*
Certificate Number	*Certificate Number that appears in the issued certificate*
Confidential	*Permission to access the Certificate Information in public*
Expiry Date	*Date on which the validity of the certificate expires.*
Accreditation Body	*Name of the Accreditation Body*
Certified Entity	*Name of the Certified Entity to which the certificate is issued to*
Site Location	*Number of accredited sites in the issued certificate*
Updated at	*Date on which the certification data is updated*

Created at	*Date on which the certification record is created*

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

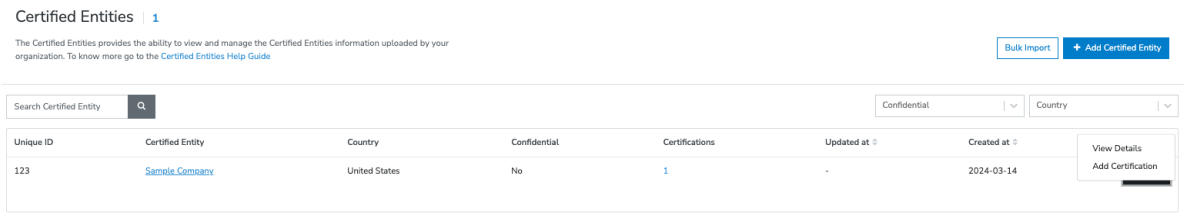
Add Certificate

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 Certification' button



3. You'll need to fill in your data into the **Certificate Information form,** which has 2 data forms: Certified Entity Information and Certificate Information.

Certification Information

Certificate Information

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

Certificate Issuance Details

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

Certification Additional Sites (optional data)

- Certified Entity Country (optional)

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

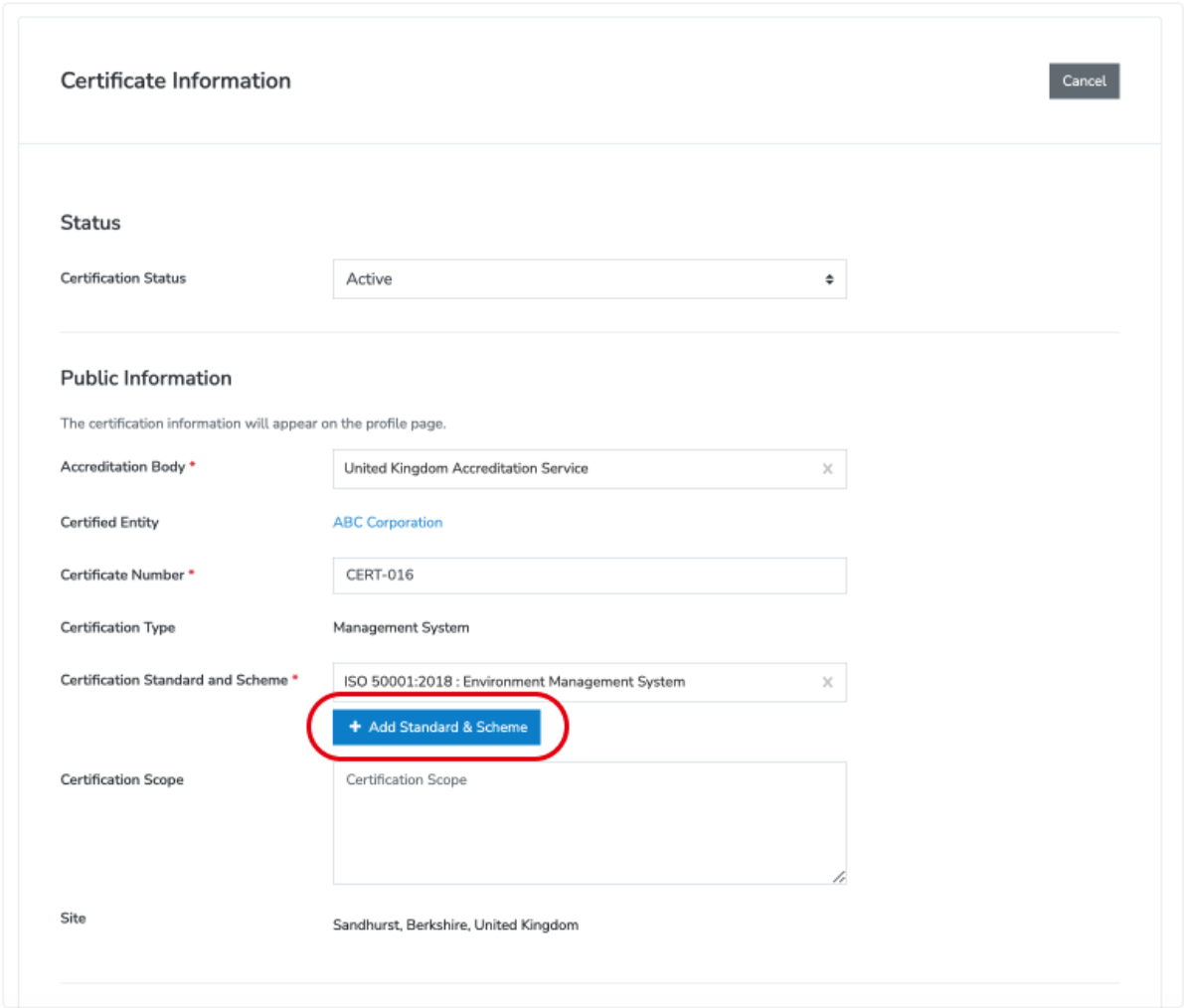
4. Once completed, click the 'Submit' button
5. If all data is valid, the Certified Entity and its certificate will be successfully added to the IAF CertSearch.

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

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



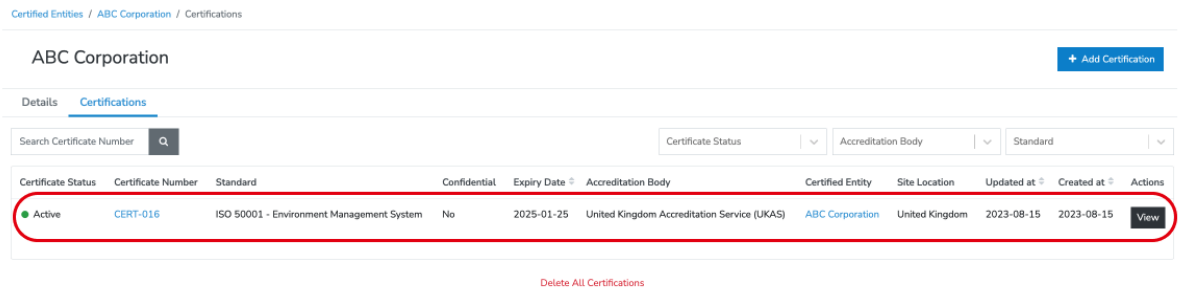
Adding a Standard in an existing certificate record.

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.

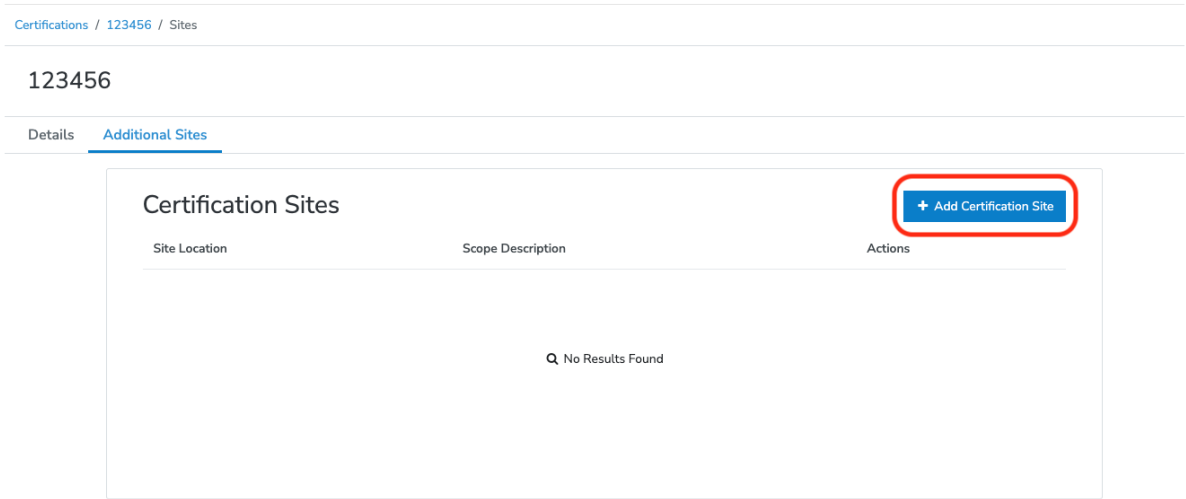
Add Additional Site

To add additional site:

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 Certification Site'** button



5. Complete the additional certification site fields:

Additional Sites Data Fields

- Country/Economy (required)
- Bldg. No. / Floor No. / Street (optional)
- Additional Site City (optional)
- Additional Site State (optional)
- Additional Site Zipcode/Postcode (optional)
- Additional Certification Scope (optional)

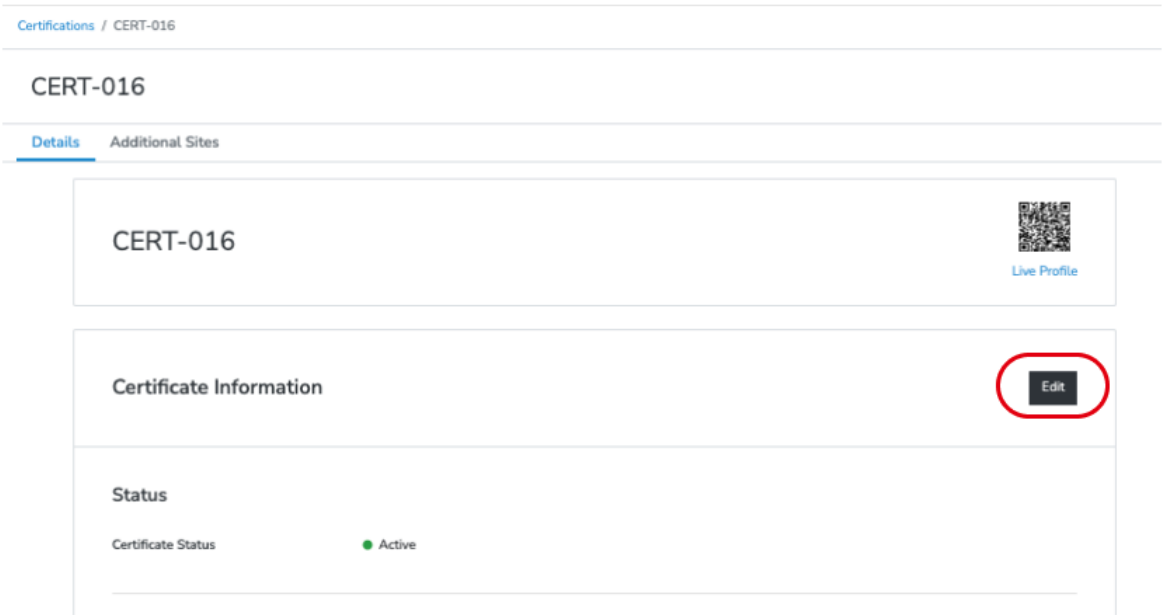
6. Click the **'Submit'** button
7. If all data is valid, the additional site data will be successfully updated.

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

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

1. Certification Status (required)
2. Accreditation Body (required)
3. Certified Entity (Hyperlink of CE)
4. Certificate Number (required)
5. Certification Type (read-only)
6. Certification Standards and Schemes (required)
7. Certification Scope (optional)

8. Certification Main Site (read-only)

Certificate Issuance Details

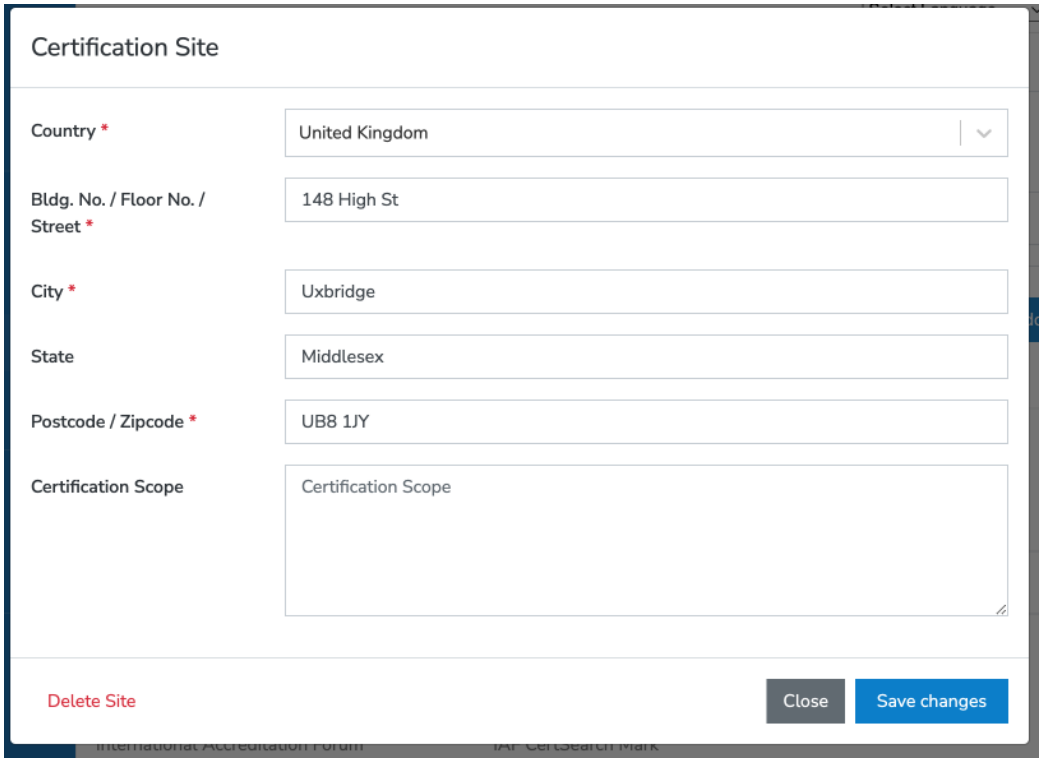
1. Certificate Original Issue Date (optional)
2. Certificate Issued Date (required)
3. Certificate Expiry Date (required)

4. Once Updated, click the **'Submit'** button
5. If all data is valid, the additional site data will be successfully updated.

Edit Additional Sites

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



Update Certification Site

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.

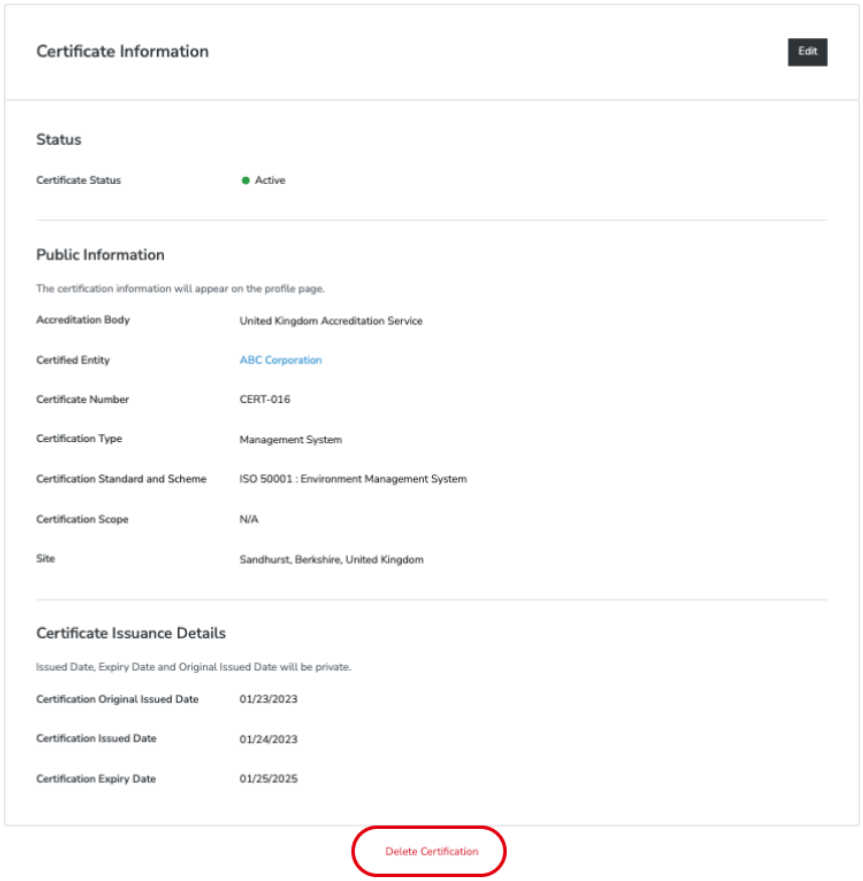
Delete Certificate

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

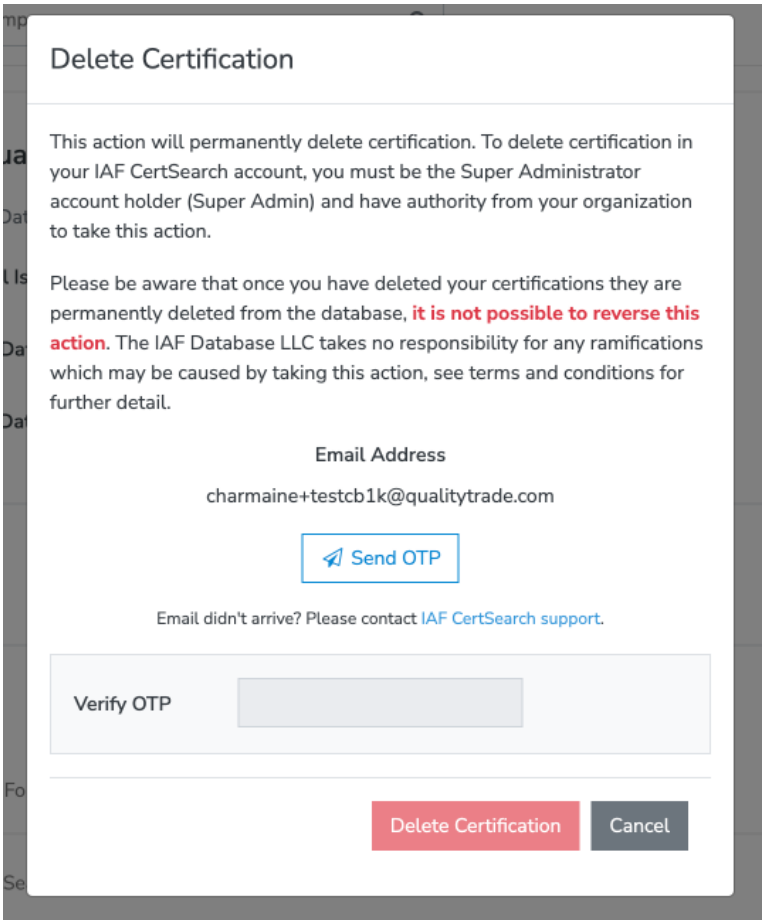
IMPORTANT NOTE: Please be aware that once you have deleted your certifications they are **permanently deleted from the database**, **it is not possible to reverse this action**. The IAF Database LLC takes no responsibility for any ramifications which may be caused by taking this action, see terms and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



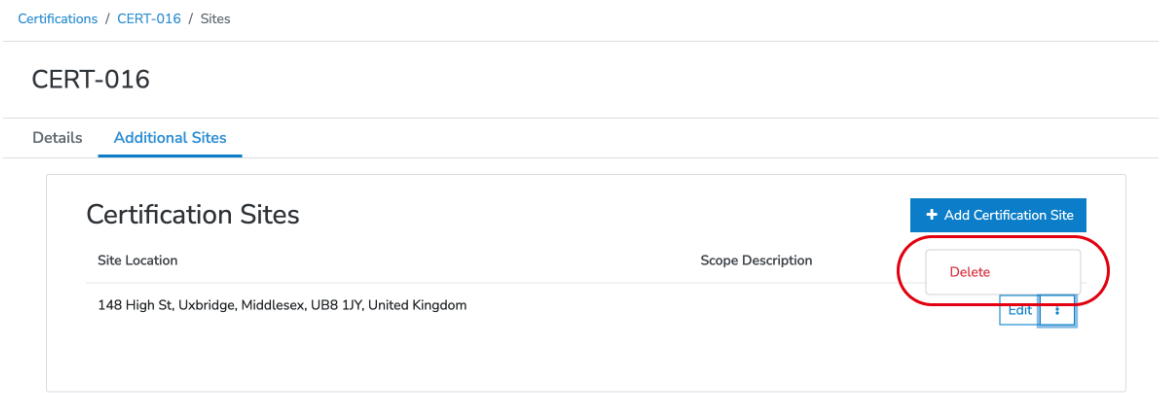
Delete Certificate Confirmation

1. Click the **'Send OTP'** button
2. Copy the code from your inbox and paste it into the Verify OTP input fields
3. Once completed, click the **'Delete Certification'** button.

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.
    a. In the actions column, click the **More** icon
    b. Click the **'Delete'** button



5. Confirm if you want to continue deleting the site, by clicking the **"OK"** button

Standards and Schemes

The Standards provide access to the CB's accredited standards, technical sectors, country/economy, and office directories. The Accreditation Bodies import and manage the data on this page.

Please note: Should you wish to update or change any of the data, please get in touch with your respective Accreditation Body

Standards and Schemes

Technical Sectors

Country / Economy

Key Locations

Standards and Schemes

The standards and schemes tab provides access to all the accredited standards assigned to the CB.

Column Name	Description	Example
Standard Status	Current standing of the CBs standard status.	*Active, Suspended, Withdrawn*
Standard	Specific set of criteria, requirements, or guidelines that the CB has been assessed against and found to be in compliance with	*ISO 9001:2015*
Scheme	Specific description of the products, services, processes, or activities for which the CB has been granted accreditation.	*Quality Management System*
Scheme Type (Program)	Refers to the main scope or program of the certificate	*Management System*
IAF MLA		check or "x"
Accreditation Body	Name of the Accreditation Body	*United Kingdom Accreditation Service (UKAS)*
Certification	Number of certifications issued with the accredited standard	*100*
Country/Economy	The countries or economies assigned to the standard	Canada, Australia

Technical Sectors

The technical sectors tab provides access to all the technical sectors assigned to the CB.

> The Technical Sector library is being updated and the sector mapping feature is being implemented to conform with the IAF MD and to support consistency and analytics. Some of your technical sectors may not be accessible whilst this update is being implemented. Any questions please contact info@iafcertsearch.org

Column Name	Description	Example
Sector Name	Segment of the economy where different businesses engage in the same or similar activity or provide the same or similar products or services.	Agriculture, forestry and fishing
Sector Code	Code assigned to the sector	*IAF01*
Standards and Schemes	Refers to the number of standards and schemes affiliated with the technical sector	*1*

Country / Economy

The country/economy tab provides access to all the countries or economies where the CB accreditations are eligible.

Column Name	Description	Example
Country/Economy	Country/Economy in which the CB is eligible to issue accredited certificates.	United Kingdom
Standards and Schemes	Shows the number of standards and schemes affiliated with the country/economy	*1*

Key locations

The office directory tab provides access to all the office addresses and office types of the CB.

Column Name	Description	Example
Office Type	Office type of the added location.	● Corporate Head Office(Main accredited entity office) ● Regional Head Office ● Country Head Office ● Branch Office
Country/Economy	Country/Economy in which the CB offices are located.	United Kingdom
Address	Office address	Unit 11, Stocklake Industrial Area, Pembroke Road
Accreditation Body	Name of the Accreditation Body	*United Kingdom Accreditation Service (UKAS)*
Standards and Schemes	Number of Standards and Schemes affiliated with the Country/Economy	1
Updated at	Date last updated	20221223
Created at	Date created	20220123

Data Import

Getting Started

Data Import Certificates provide the ability to import your data into IAF CertSearch through different import methods. The data can come from a variety of sources, including **spreadsheets (.xlsx), text files (XML)** or **APIs**. It is recommended for members who want to upload bulk data from at least 20 up to 100,000 or more.

This documentation will help you get started with uploading and managing your data through different Data Import Methods.

Before proceeding to import, we recommend ensuring the following prerequisites have been met:

Prerequisites

An active IAF CertSearch CB account

A formatted file, containing the data you want to upload

Certification Templates

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

Learn about the CB data structure

- Certification 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

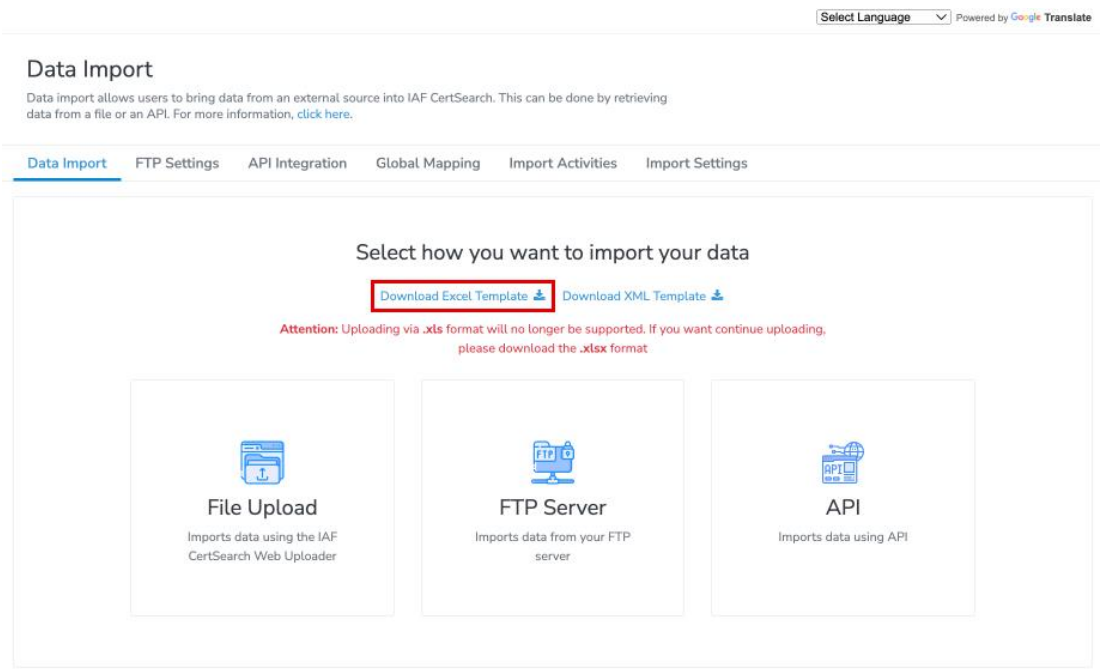
XML Templates

XML previous template versions

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

To download the Certification **Excel** Data Templates from IAF CertSearch:

1. Under Data Management, go to the Import page
2. To download the Excel template, click the **'Download Excel Template'** button

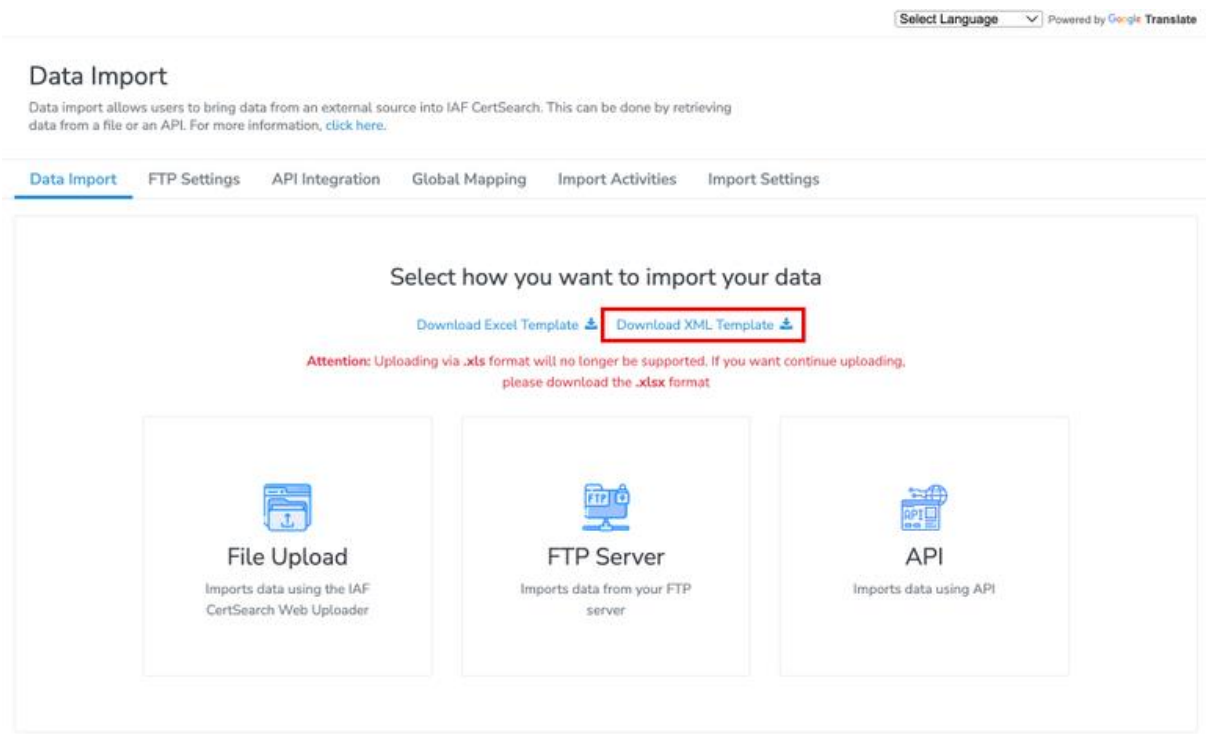


Additional Note: When you click the Download Template button, different versions of the templates should be available for download.

Once downloaded, you may start adding your data to the spreadsheet.

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

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



Additional Note: When you click the Download Template button, different versions of the templates should be available for download.

Once downloaded, you may start adding your data to the XML file.

Excel General Rules

General Rules

File Format	File format should be **.xlsx 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: `cb_certs.xlsx` Multiple files: `cb_certs_1.xlsx`, `cb_certs_2.xlsx`, `cb_certs_3.xlsx`

DOs

- **Keep data format consistent**
- **Format data into the provided IAF CertSearch template**
- **Enter single data value entry per cell**

DONTs

- **Do not upload other formats** supported in Excel, such as .xls, .xlsm, .xlsb, .xlr
- **Do not delete any columns** from the template. If deleted, the system will throw a missing field error.
- **Do not skip field mapping**. If skipped, data is not processed and imported.
- **Do not merge columns**. If merged, the system throws a data field error.
- **Do not leave the required fields empty**
- **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

Import Certification Data from Excel file

> **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

1. Certified Entity Name (required)
2. Certified Trading Name (optional)
3. Certified English Name (optional)
4. Certified Entity Street (required)
5. Certified Entity City (required)
6. Certified Entity State (optional)
7. Certified Entity Country (required)
8. Certified Entity Zipcode/Postcode (required)

Certificate Information - certificate issued to the Certified Entity

1. Certificate Number (required)
2. Certification Status (required)
3. Certification Type (required)
4. Certification Standards and Schemes (required)
5. Certification Scope (optional)
6. Certification Original Issue Date (optional)
7. Certification Issue Date (required)
8. Certification Expiry Date (required)

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

1. Once completed, go to the IAF CertSearch Data Import page
2. 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
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.

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

(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 t

- 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 Standard & Scheme

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

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

Certification Additional Sites

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

- Certification Identity Number (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)

1. Once completed, go to the IAF CertSearch Data Import page
2. 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
3. Once selected, click the **'Continue'** button *(which initiates data validation)*
4. 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

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.

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)

1. 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.

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

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 .xml
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: cb_certs.xml Multiple files: cb_certs_1.xml, cb_certs_2.xml, cb_certs_3.xml
XML Tag	XML tags must be the same as in the template. If changed IAF CertSearcg 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>

9. **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

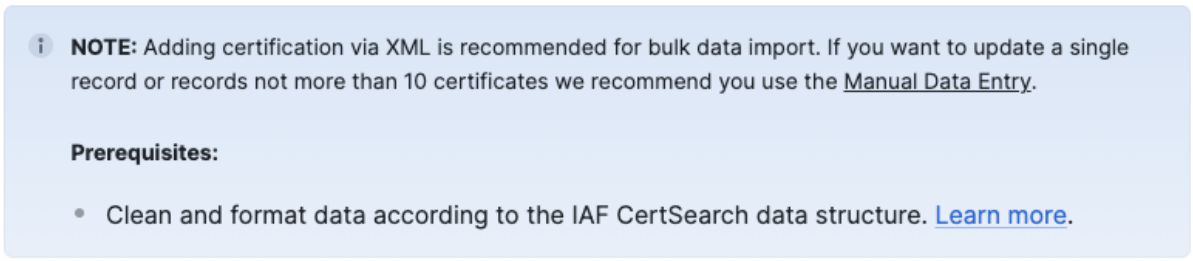
4. **Do not leave the mandated fields blank or empty**
5. **Do not add multiple data to a 1 tag**

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



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

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

XML Fields

Certification Templates

```
<?xml version="1.0" encoding="UTF-8"?>
<cb_certs>
	<certification>
		<certificate_identity_number></certificate_identity_number>
		<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_original_issue_date>
		<certification_issue_date></certification_issue_date>
		<certification_expiry_date></certification_expiry_date>
		<certified_entity_name></certified_entity_name>
		<certified_entity_trading_name></certified_entity_trading_name>
		<certified_entity_english_name></certified_entity_english_name>
		<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>
            <certified_entity_website></certified_entity_website>
            <accreditation_body_name></accreditation_body_name>
            <accreditation_body_acronym></accreditation_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>
</cb_certs>
```

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 to

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

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

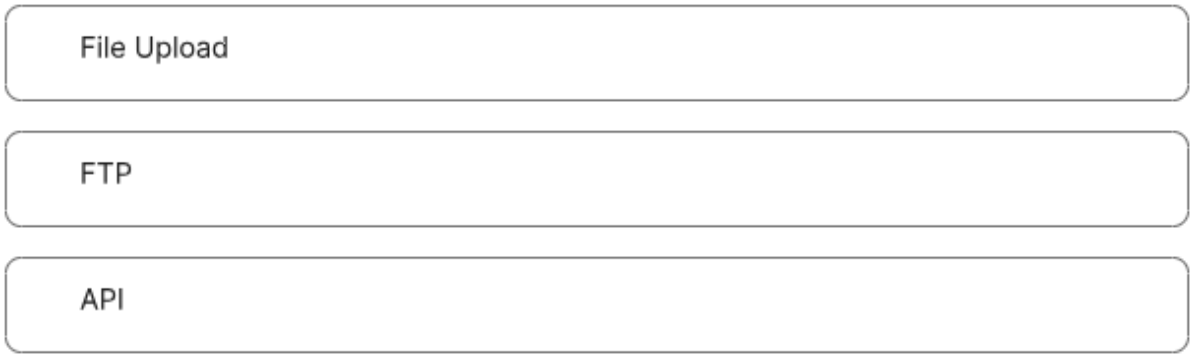
1. Once completed, go to the IAF CertSearch Data Import page
2. Choose how you would like to import your data
    a. **File Upload** - Learn how to import data through File Upload
    b. **FTP -** Learn how to import data through FTP
3. Once selected, click the **Continue** button *(which initiates the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

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

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: XLS, XLSX and XML

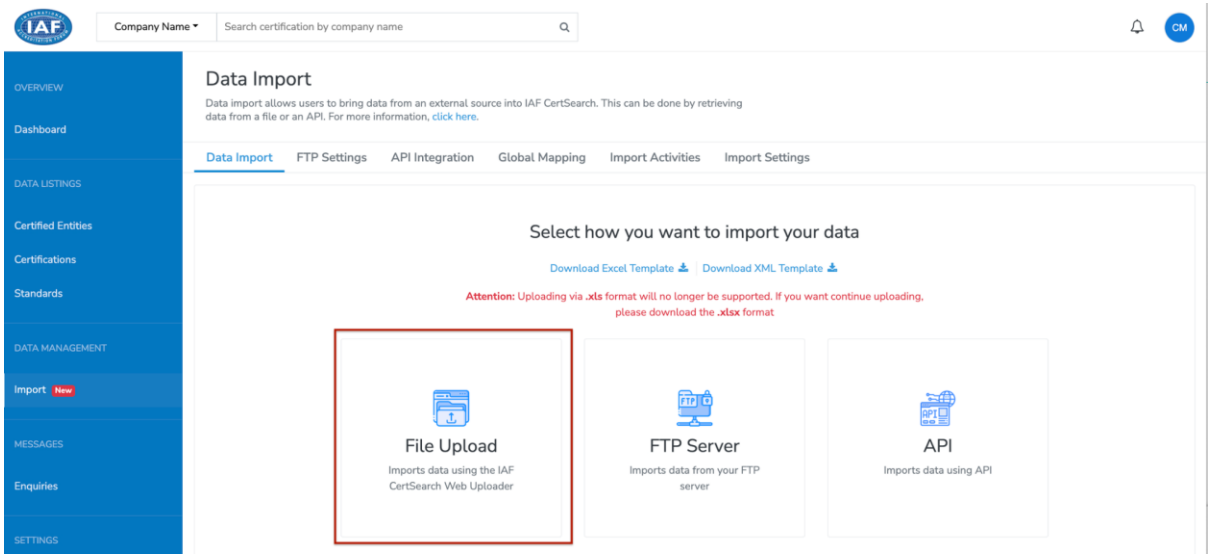
Recommended: Small, Medium and Large CBs that have anywhere between 20 to 100,000 certifications

---

How to import data via File Upload

To import your data via File Upload:

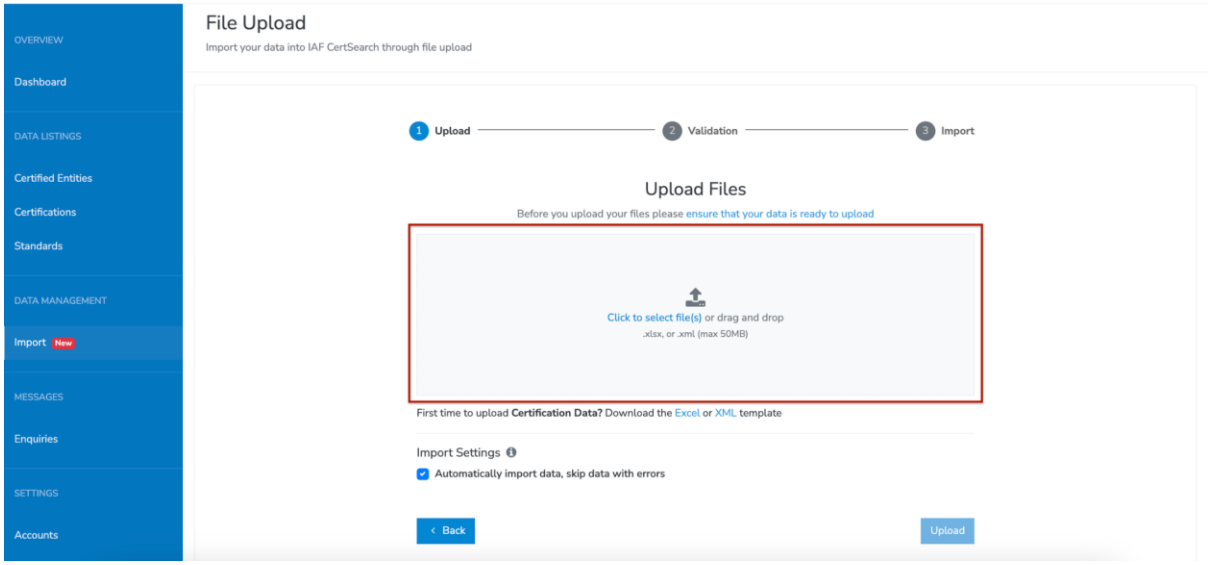
1. go to the **Data Import** page
2. Choose **'File Upload'** as your data import method



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.

File Upload Rules

Batch File Limit

Validates the number of files uploaded and processed all at once, rather than uploading them one by one.

> **Limits:**
>
> - **10 files per batch**
> - Each file can contain at least 10k records

Do not upload more than 10 files at the same time. If you have more than **100k records** it is recommended to **import via the API.**

FTP

Getting Started

TP 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. F

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

Acceptable Formats: XLSX and XML

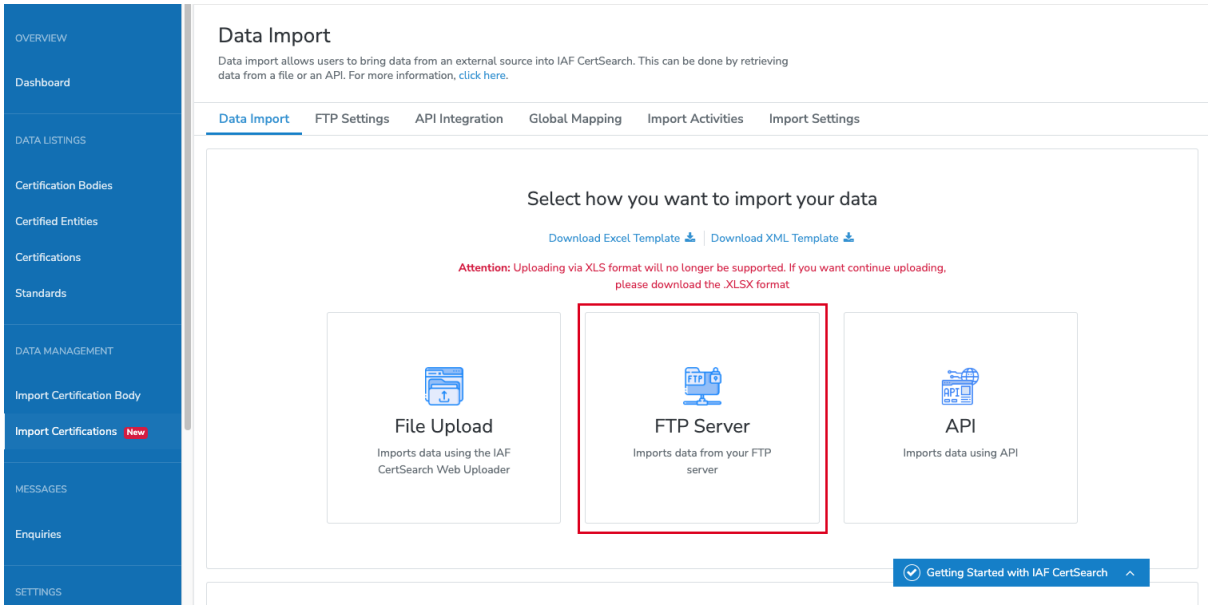
Recommended: Small, Medium, and Large Certification Bodies that have anywhere between 20 to 50,000 certifications

Prerequisites

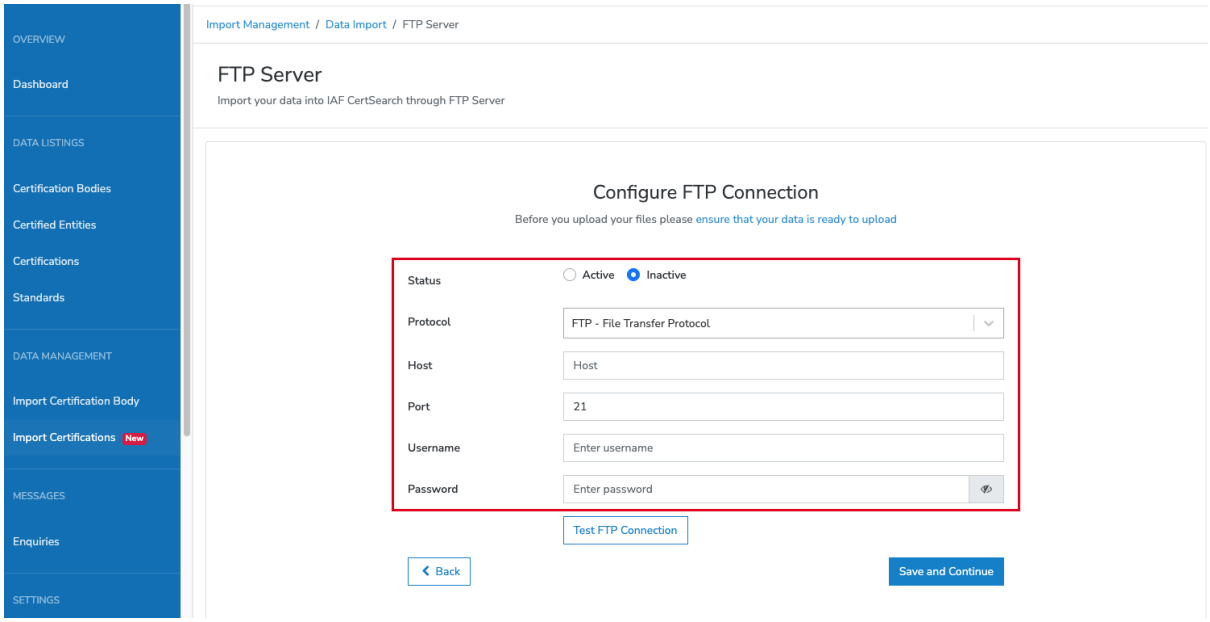
1. Set up an Active FTP Connection
2. In your FTP server, upload files (.xlsx or XML) with your formatted data
3. Define the filenames you want to retrieve from the server

How to import data via FTP

1. go to the **Data Import** 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**
5. To check if the FTP is successfully connected, click the '**Test FTP Connection**' button.
6. Once the FTP is connected, click the **'Save and Continue'** button.



7. 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

> 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

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

API

To import data through API please go to the **API Developer Guide**:

- **Getting Started**
- **Authentication**
- **Requests**
- **Responses**
- **Errors**
- **Certification Body APIs**
- **Certification APIs**
- **Certified Entity APIs**

FTP Settings

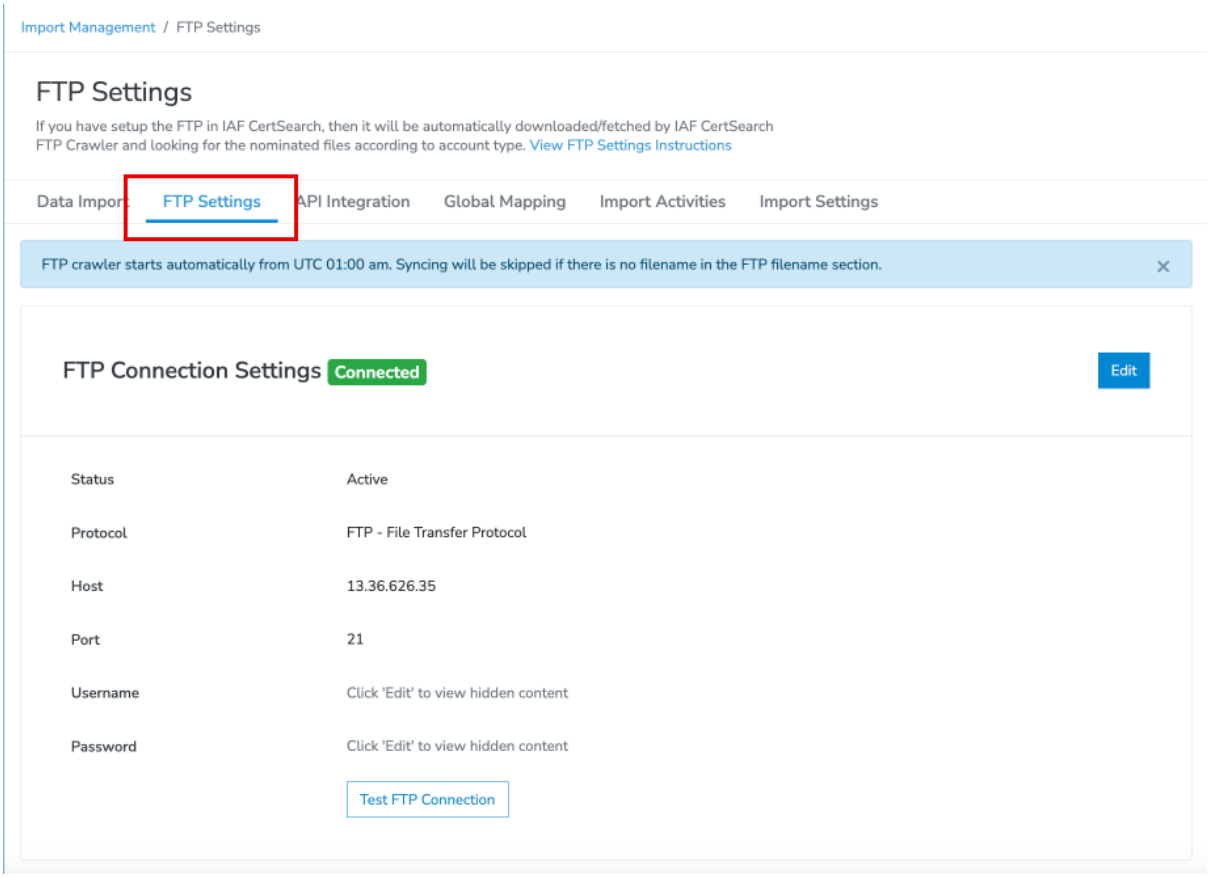
Getting Started

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.

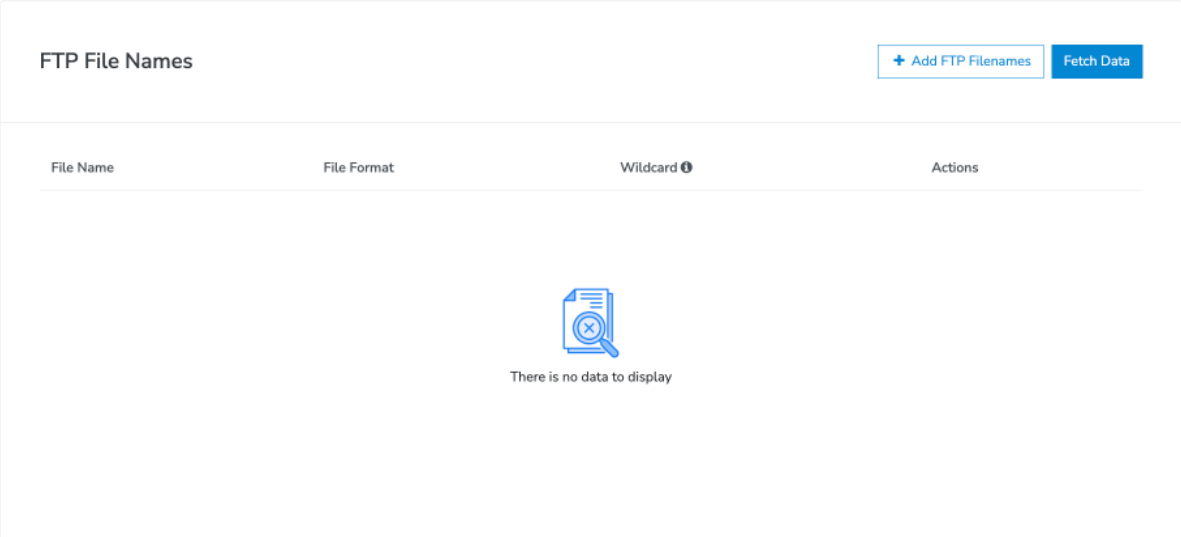
1. Setting up an Active FTP Connection
2. Define the files that should be retrieved from the FTP
3. Fetch files for data import
4. View FTP Import Activities

Setting up your FTP Connection Settings

1. Go to the **Import** page
2. From the navigation tab, click **'FTP Settings'**

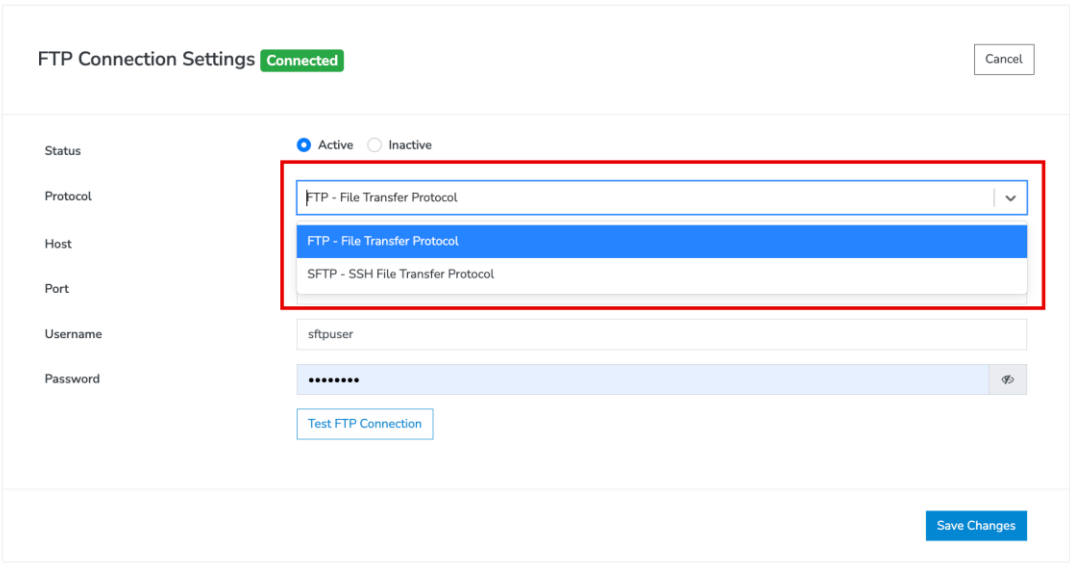


3. Click the **'Edit'** button



FTP Connection Settings

- 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 Changes'** button.

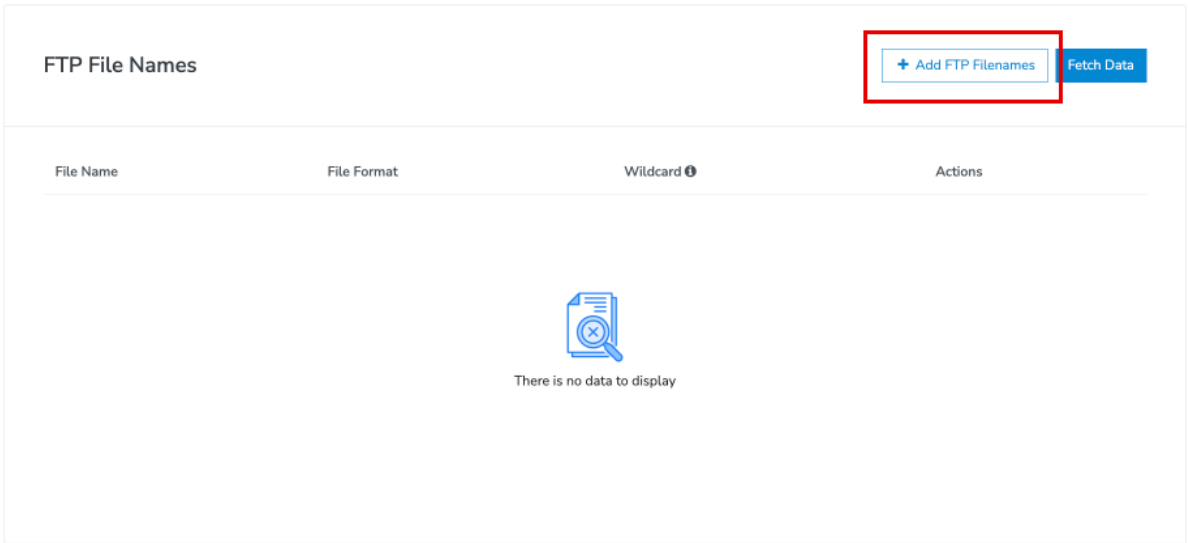
Once you are done setting up your FTP connection, the next step is to add the files you want to fetch or retrieve from the FTP servers.

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.

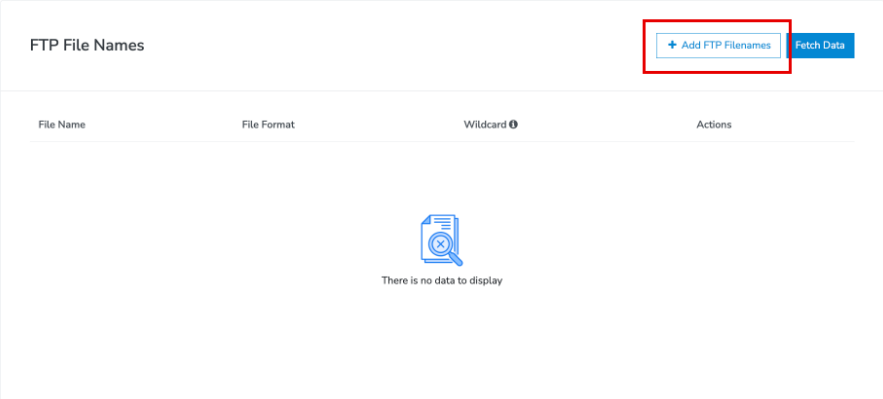
> **Prerequisite**
>
> Before defining the filenames, ensure that you have uploaded the files *which contain your formatted data* into the FTP server.

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:* cb_certs_1.xlm, cb_certs_2.xlsx
- If you want to add more than 1 filename, click the '**+ Add FTP Filename**' button
- 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

In this section, you'll have the ability to generate an API Key and have access to the API documentation.

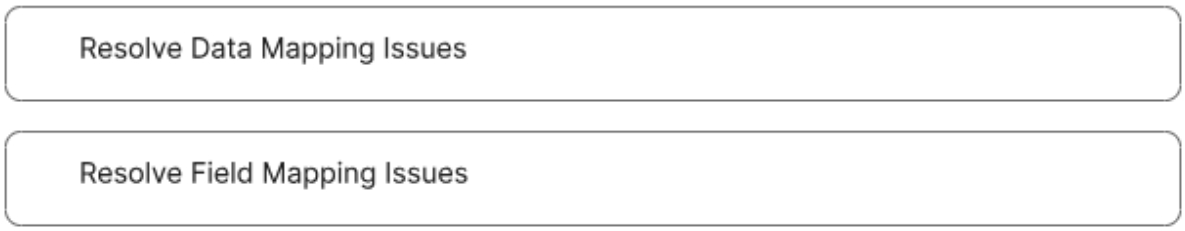
To import data through API please go to the API Developer Guide:

- **Getting Started**
- **Authentication**
- **Requests**
- **Responses**
- **Errors**
- **Certification APIs**
- **Certified Entity APIs**

Global Mapping

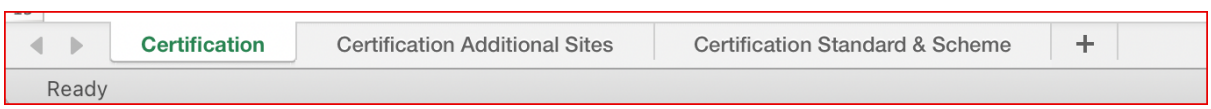
This section guides you on how to manage your Global Mapping settings which include, Data Mapping and Field Mapping.

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



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

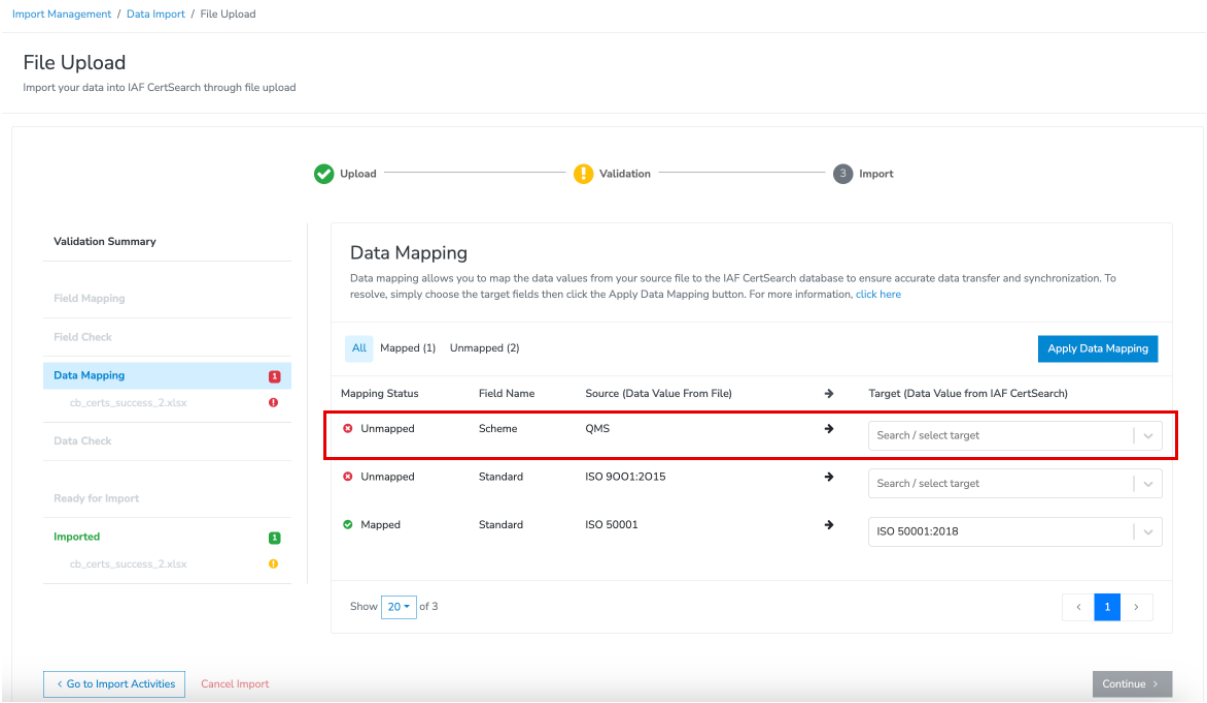


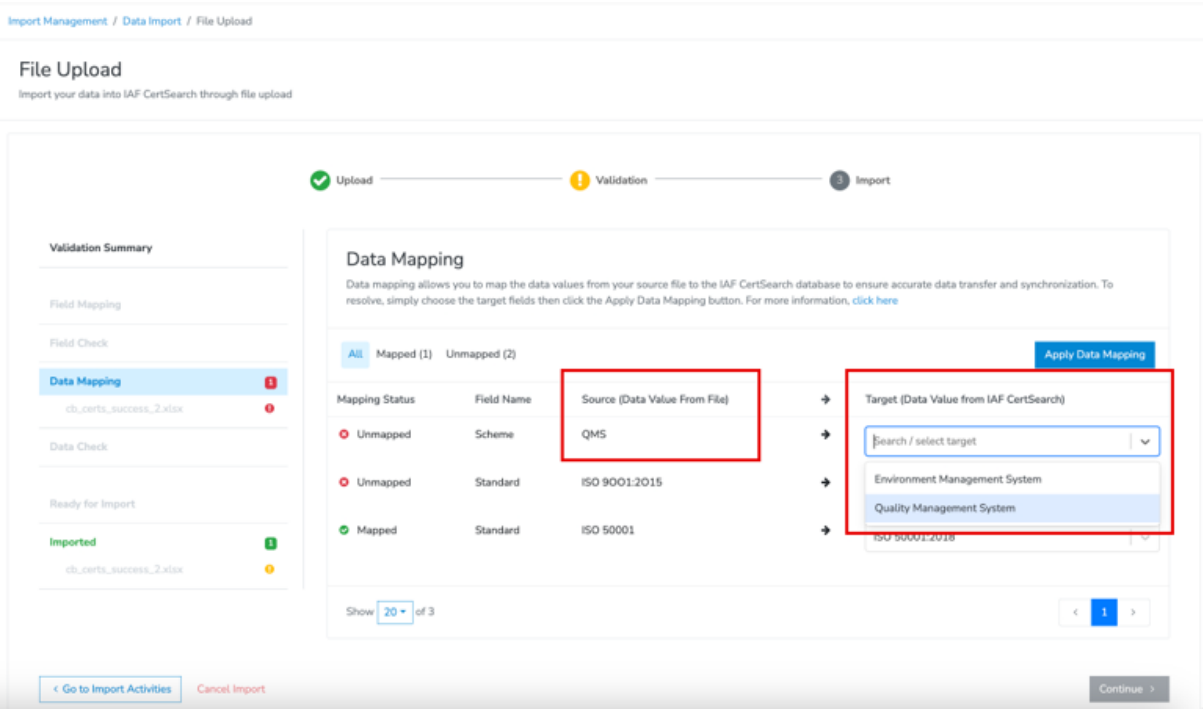
Data Mapping

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

What is Data Mapping?

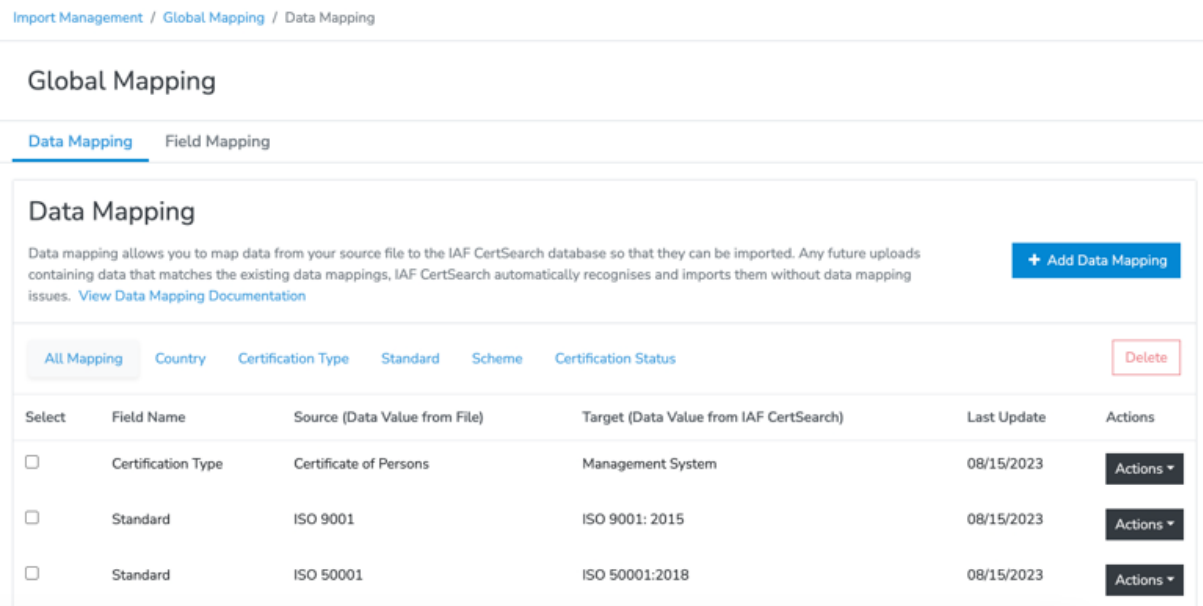
Data Mapping issues are caused by when the data value from the source file does not match the required data value in the IAF CertSearch database, see the example below:





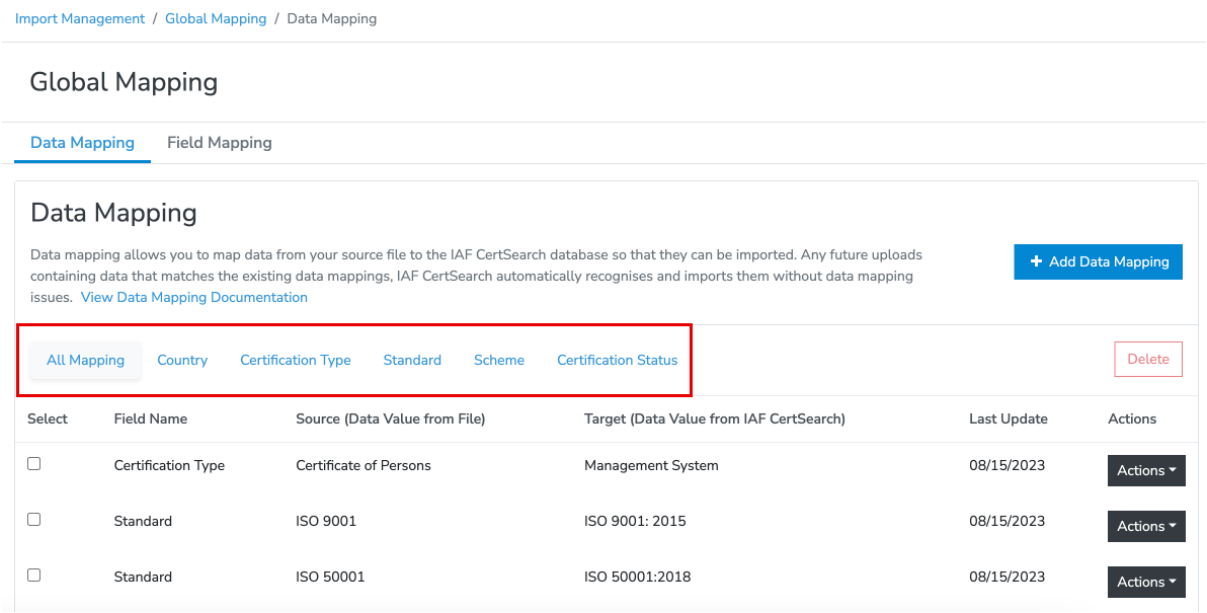
View all your mapped data

1. Go to "**Import**"
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.



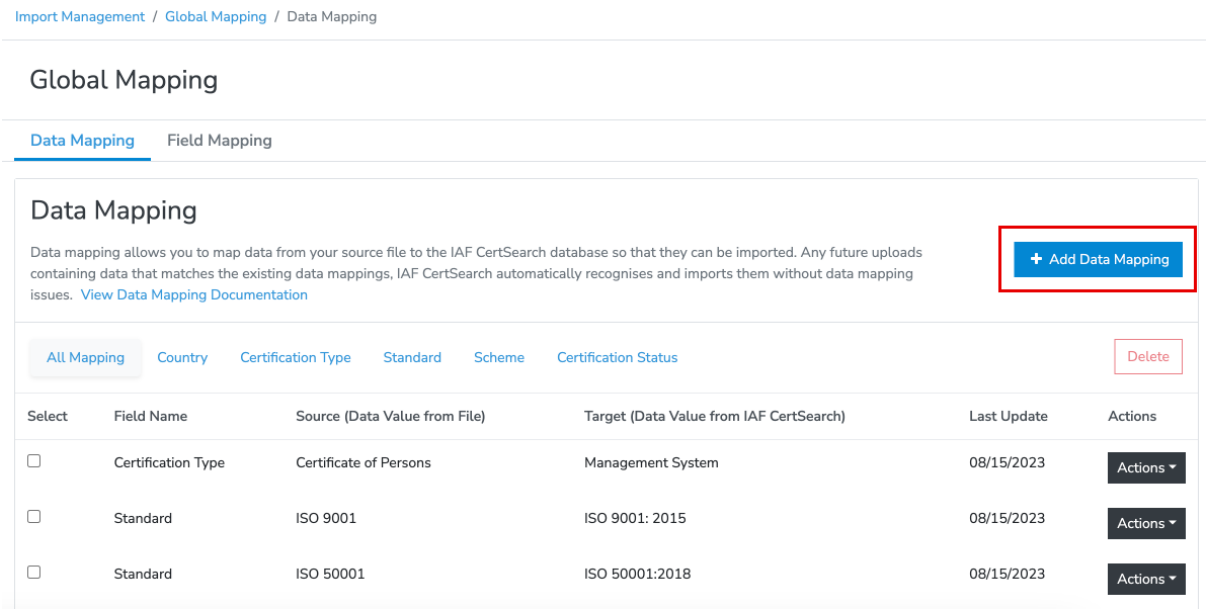
4. If you prefer to see a list filtered by a specific field, you can click through the navigation ta

- **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"**
2. Click the **'Global Mapping'** tab
3. In the Data Mapping tab, click the **'+ Add Data Id Mapping'** button



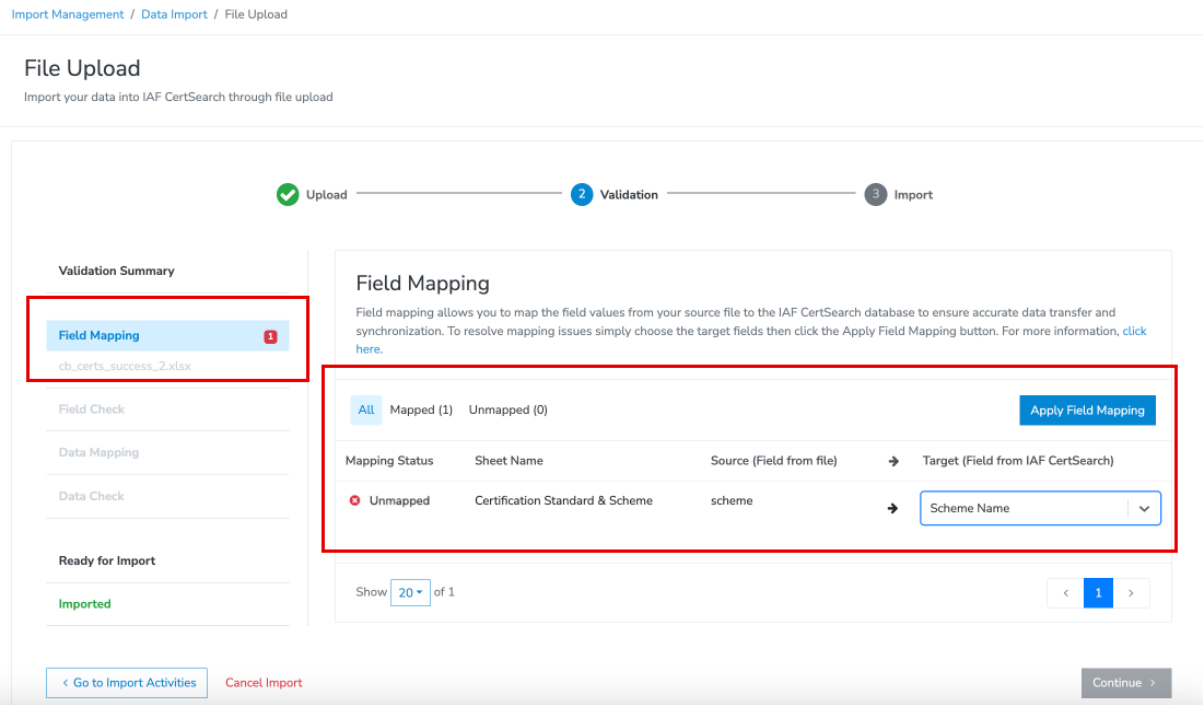
1. Enter the value of the source data
2. Select where you want to map the source data
3. If you want to add multiple mapping:
    - Click the '**Add Field Mapping**' button
4. Once done, click the '**Submit**' button

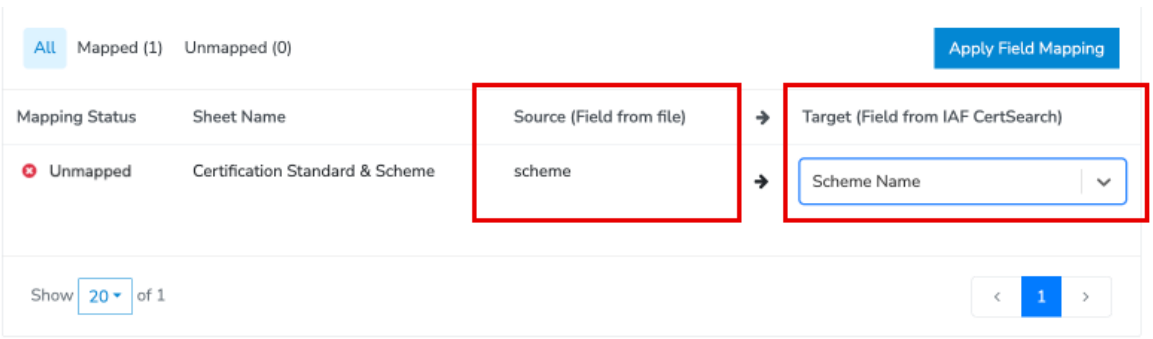
Field Mapping

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

What is Field Mapping?

Field Mapping issues are caused by when the field name from the source file does not match the field name in the IAF CertSearch database, see the example below:



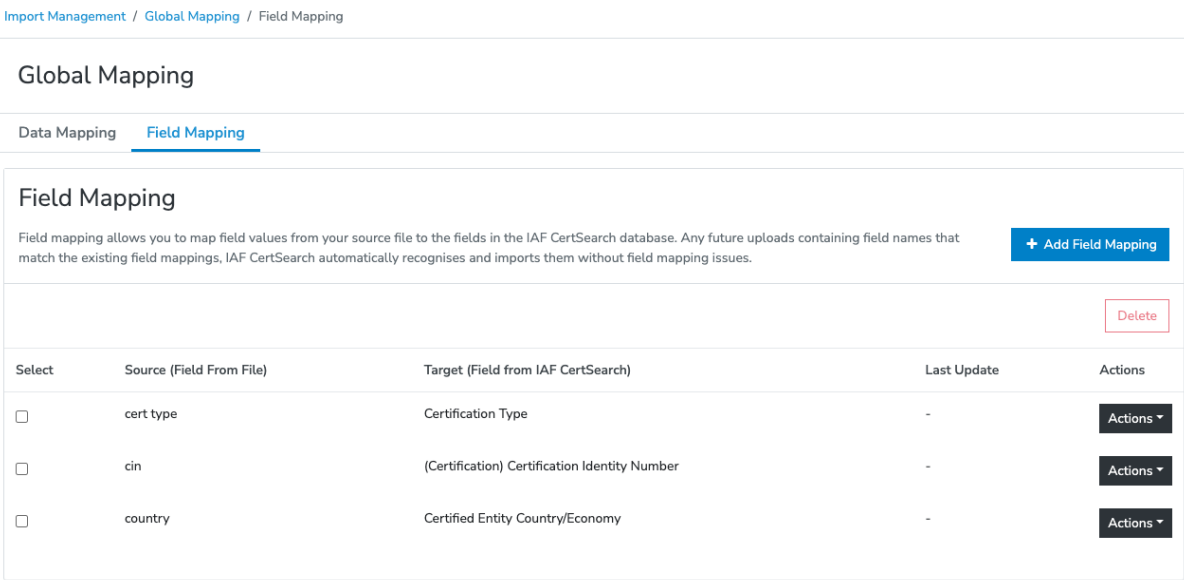


Tips

To minimize data upload issues, we recommend you add field mapping before importing your data. This way you can eliminate interruptions during the import process. To know more about adding field mapping, click here.

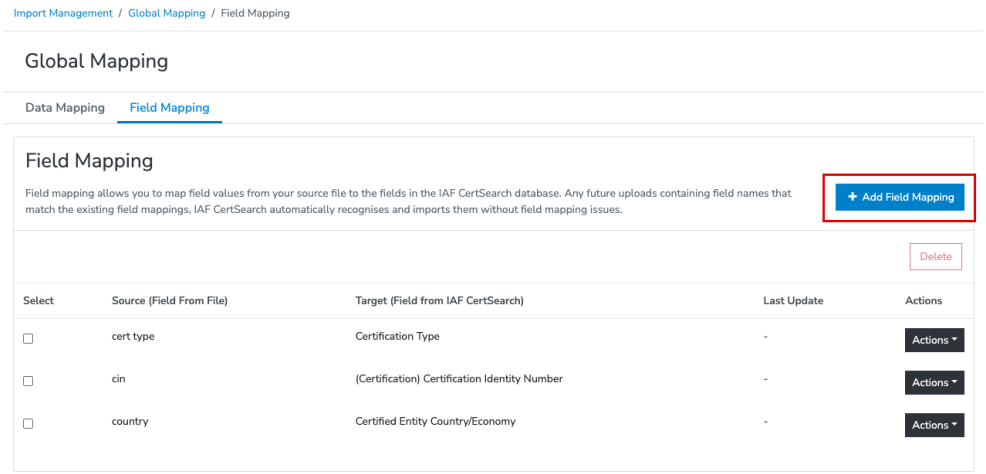
View Mapped Fields

1. Go to Data Import
2. Click the **'Global Mapping'** tab
3. On the Global Mapping page, click the **'Field Mapping'** tab
4. This page displays all your Mapped and Unmapped fields in all of your import activities.



Add Field Mapping

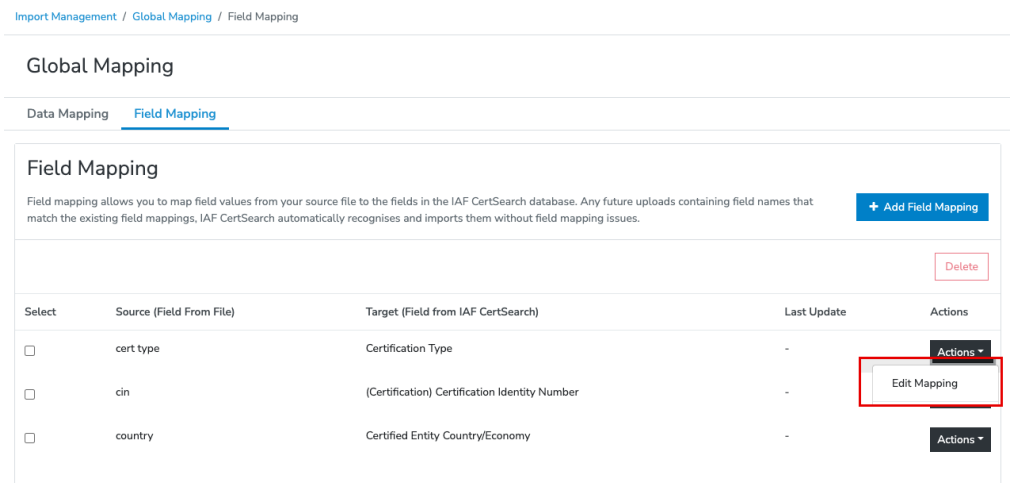
1. Go to Data Import
2. Click the **'Global Mapping'** tab
3. On the Global Mapping page, click the **'Field Mapping'** tab
4. Click the **'+ Add Field Mapping'** button



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

Edit Mapped Fields

1. Go to Data Import
2. Click the **'Global Mapping'** tab
3. On the Global Mapping page, click the **'Field Mapping'** tab
4. Click the **'Actions'** button



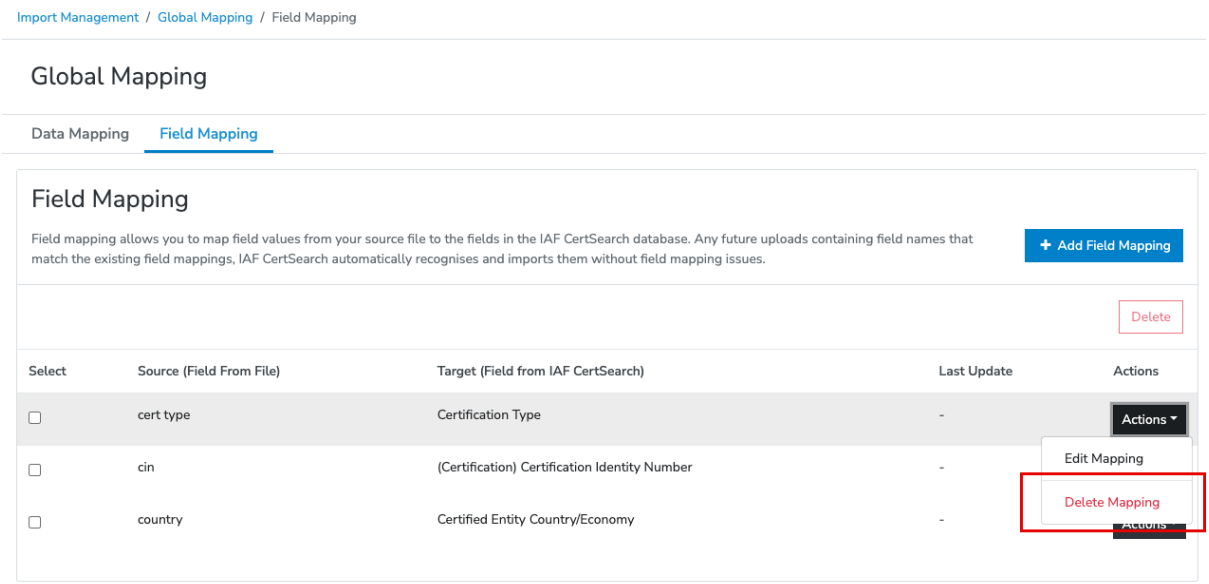
5. Then, click the **'Edit Mapping'** button
6. In the Edit modal, enter the value you want to update.

7. Once deleted, the deleted mapped field should no longer appear in the field mapping list

Delete Individual Mapped Fields

To delete an individual mapped field:

1. Go to Data Import
2. Click the **'Global Mapping'** tab
3. On the Global Mapping page, click the **'Field Mapping'** tab
4. Look for the mapped field you want to delete
5. Click the **'Actions'** button



Deleting an individual mapped field

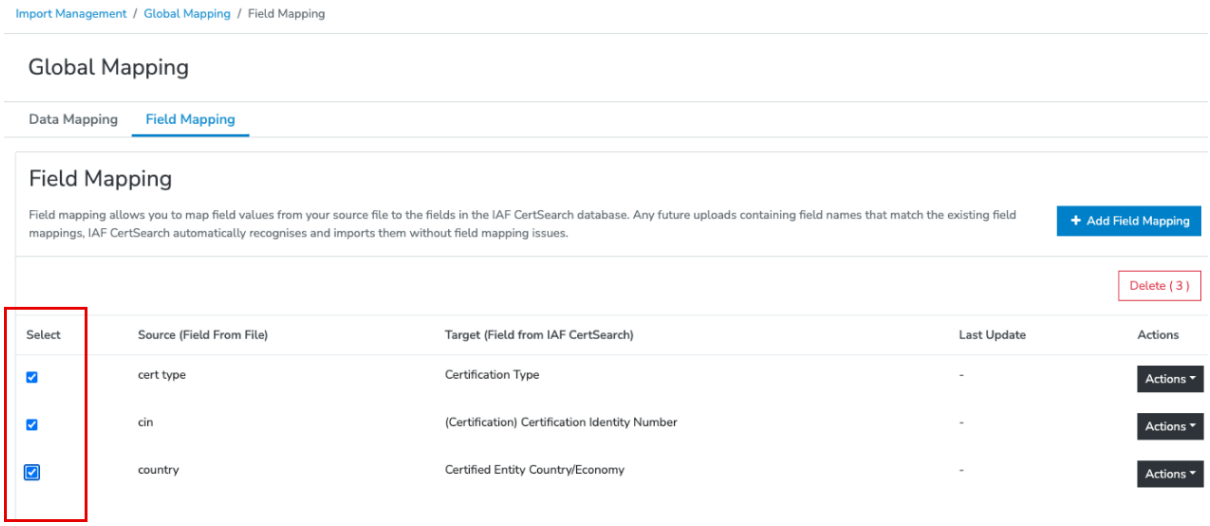
6. Click the **'Delete Mapping'** button
7. A confirmation modal will appear, click **'OK'**
8. Once deleted, the deleted mapped field should no longer appear in the field mapping list

> **Please note:** Deleting a mapped field means you no longer need to import the unrecognized source field to match the target field in IAF CertSearch.

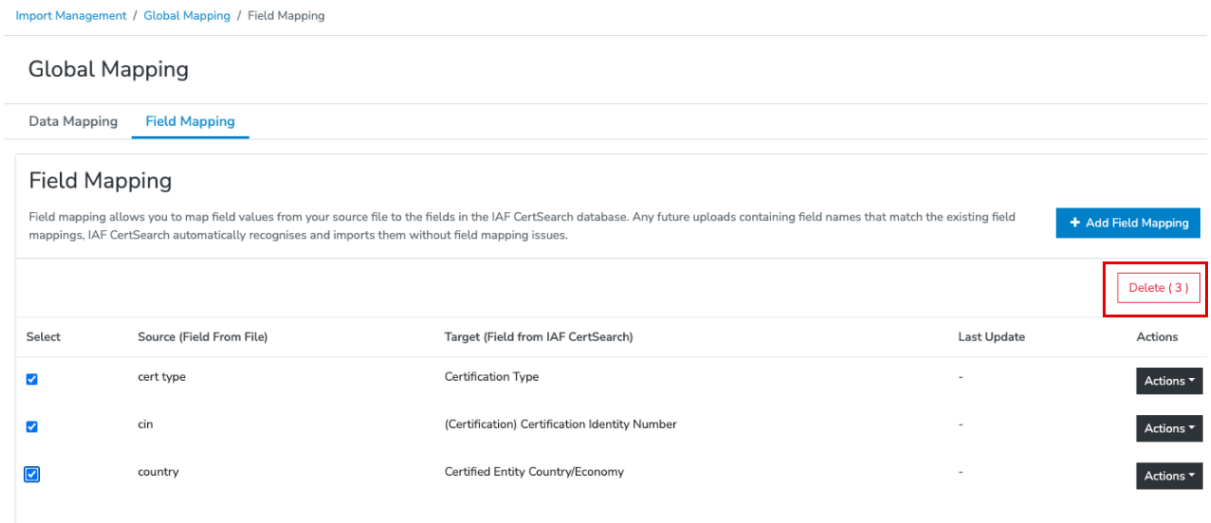
Delete Multiple Mapped Fields

1. Go to Data Import
2. Click the **'Global Mapping'** tab
3. On the Global Mapping page, click the **'Field Mapping'** tab

4. Look for the mapped field you want to delete
5. In the Select column, click the checkbox of the mapped fields you want to delete



6. Once selected, click the **'Delete'** button in the top right corner of the list.



7. A confirmation modal will appear, click **'OK'**
8. Once done, the deleted mapped fields should no longer appear in the field mapping list

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, skip data with errors

If checked, the system process 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 on how to handle and resolve errors during the data import process.

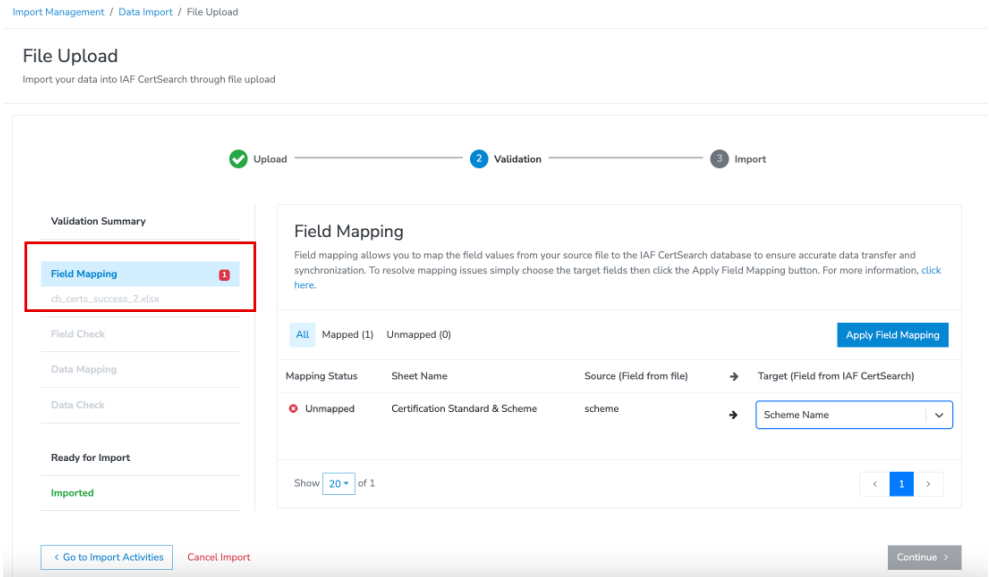
- Resolve Field Mapping Issues
- Resolve Field Check Issues
- Resolve Data Mapping Issues
- Resolve Data Check Issues

Resolve Field Mapping Issues

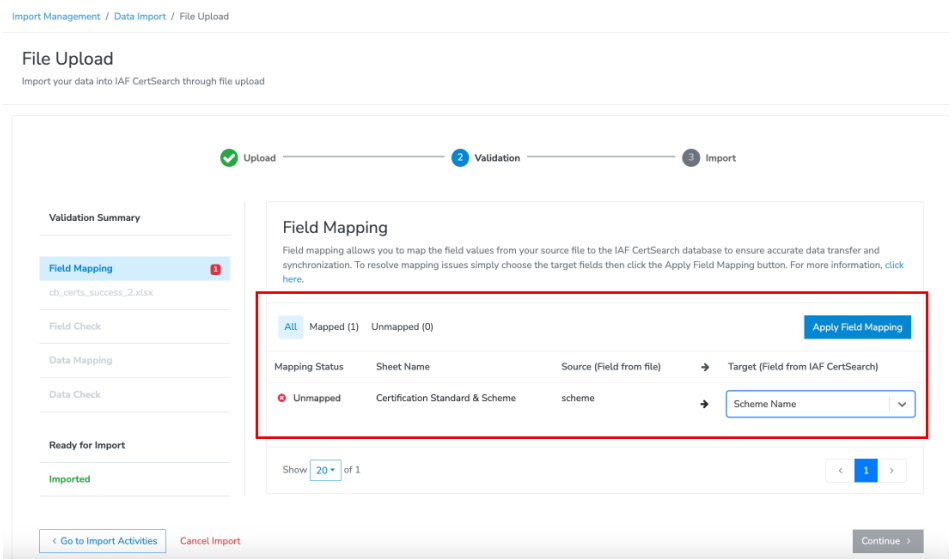
The Field Mapping issue may appear during the initial data validation process, which always takes place after selecting the files you want to upload **(Step 2 of data import)**.

To Resolve Field Mapping Issues

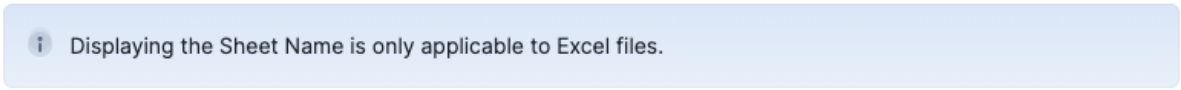
1. Click the '**Field Mapping**' from the validation navigation within the data import process:



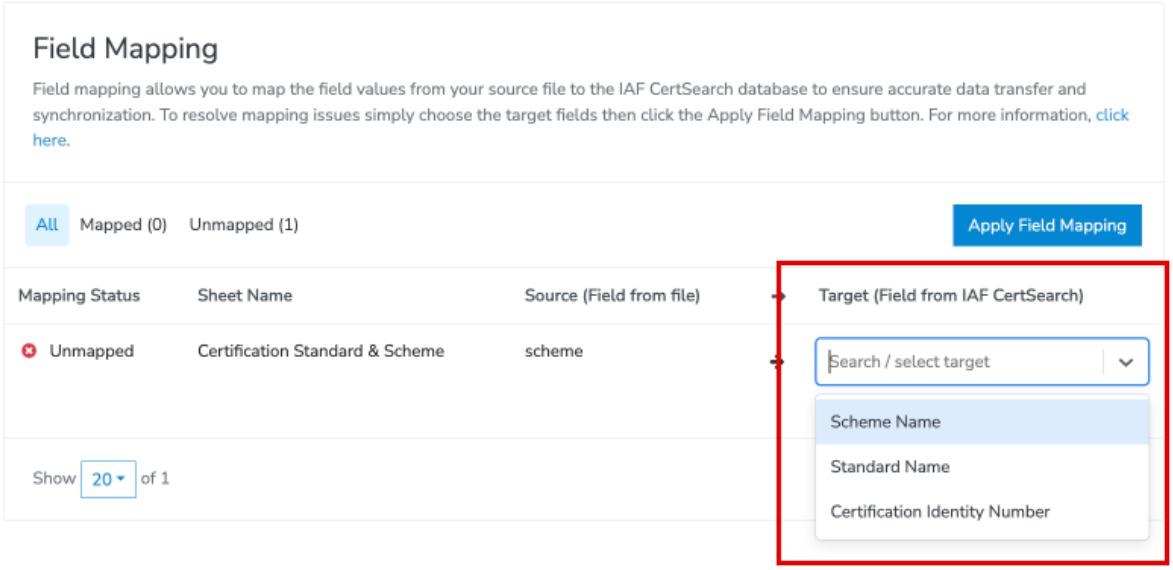
2. Once clicked, a list of all the fields that are unrecognized by the system is listed in the main content area.



3. In the field mapping list, you're provided with the error details such as:



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.

4. Once selected, click the **'Apply Field Mapping'** button to ensure that the mapped fields are submitted.
5. Once done, the system will continue validating your data. To learn more about the Data Validation Process, click here.
6. If all data is valid, your data will be successfully imported.

Resolve Field Check Issues

How to resolve Field Check Issues?

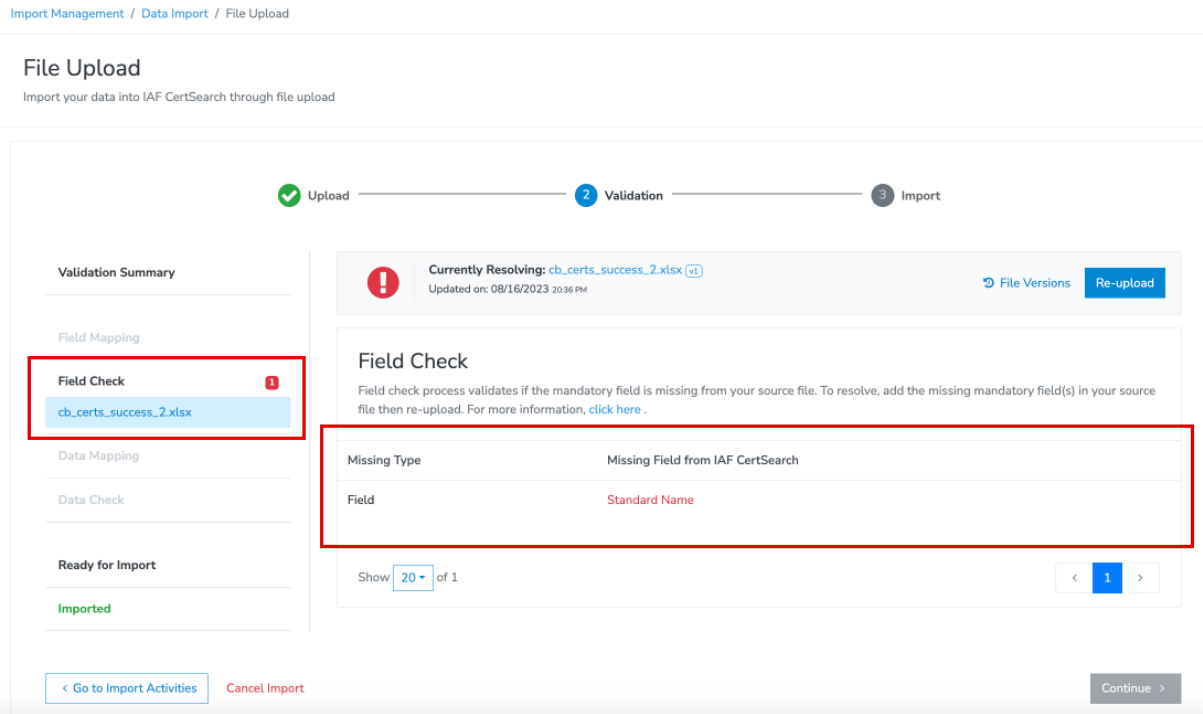
1. In Step 2 of the validation process, under the Field Check navigation, click on the files listed that encountered the field check issue.
2. Read the error message and go to your Spreadsheet or XML to add the missing required field.
3. Save your file (ensure that you are uploading the same file)
4. 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.

To know more about Field Check, read the related articles below:

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

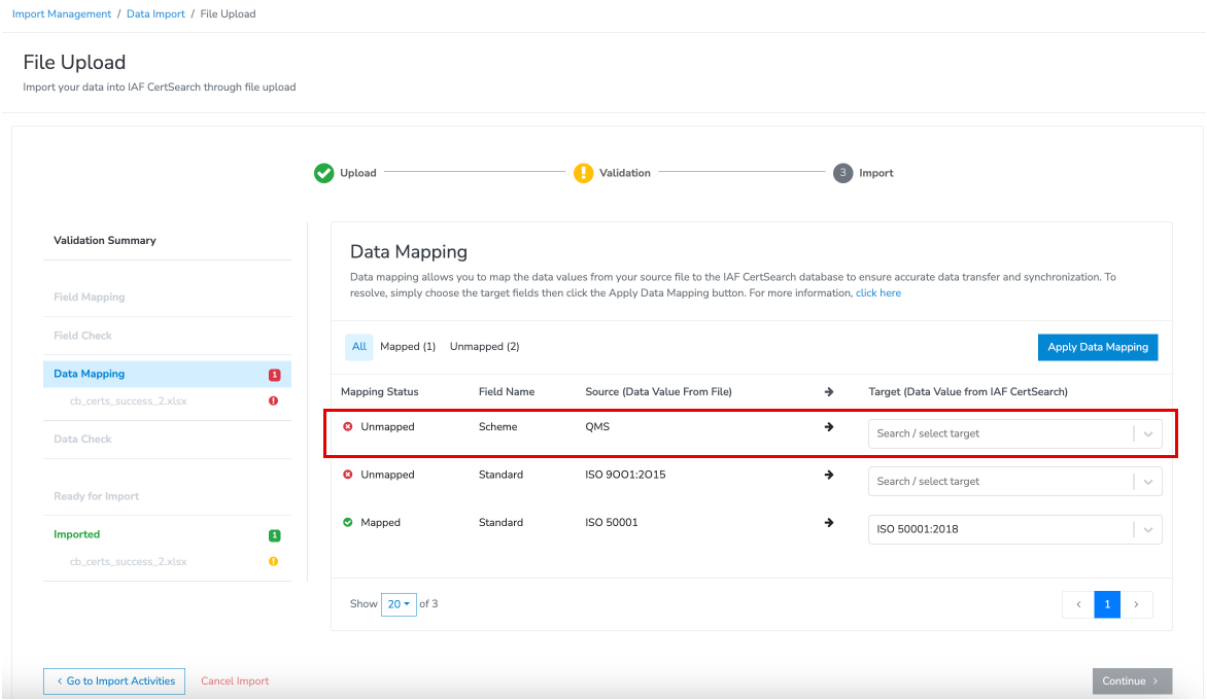
If the system checks that the required tags, attributes or elements are missing from the XML file, the import process will be interrupted with a field check error.

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)**.

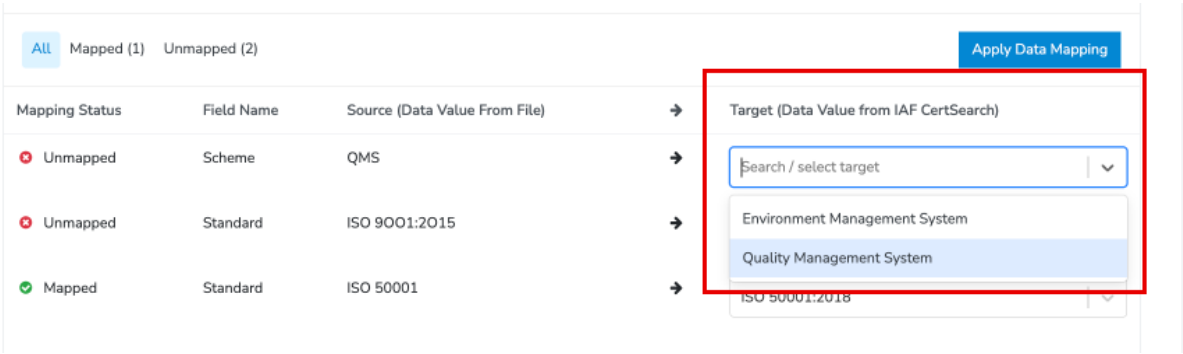
To Resolve Data Mapping Issues

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.

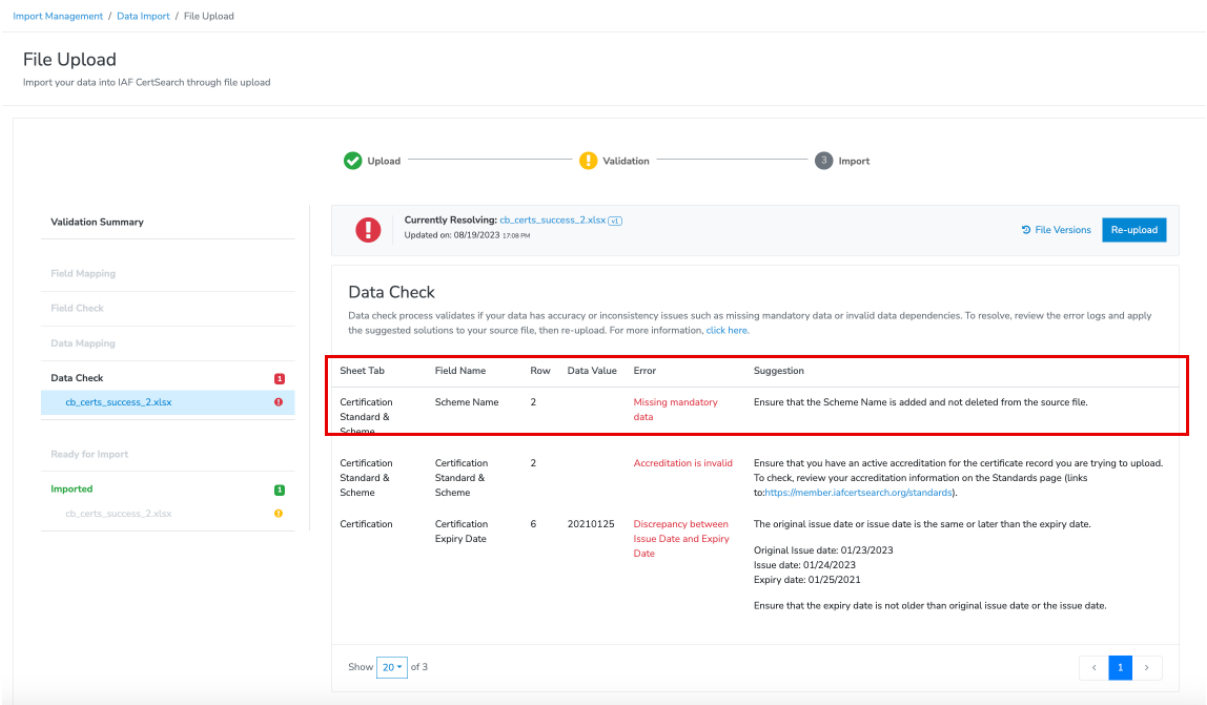
What is Data Check?

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

1. Click the **'Data Check'** 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.



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

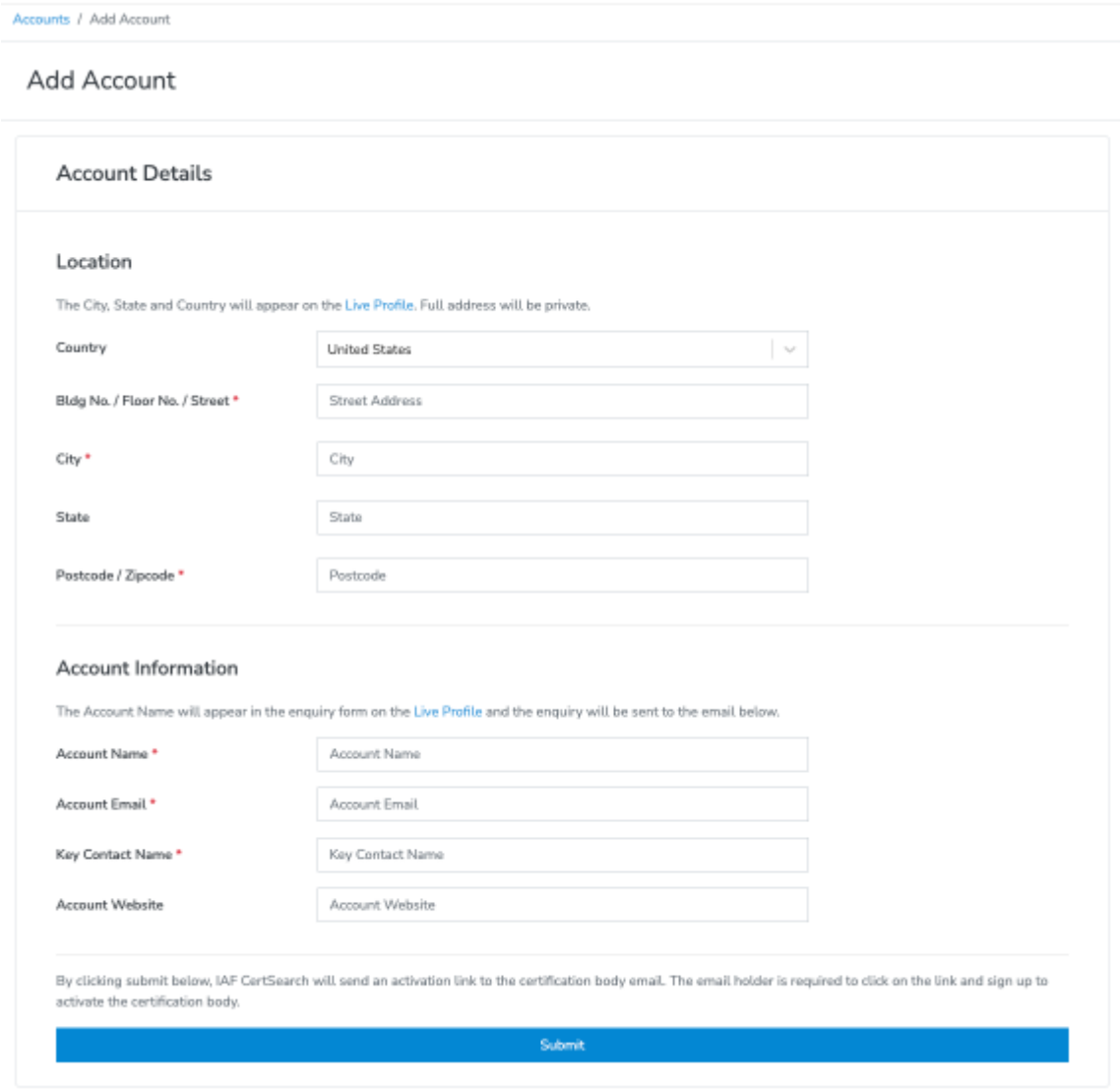
Accounts

You can create multiple accounts under the Certification Body Account. The account user will be able to manage data (View, Upload, Edit and Delete) and receive enquiries from the IAF CertSearch for their specified location.

To view the accounts under your Certification Body account, click **Accounts** in the left-hand navigation. Here you can view the account information such as Account Status, Account Name, Location, Updated at and Created at.

Add Account

1. From the Dashboard, click **Accounts** in the left-hand navigation.
2. On the Accounts page, click **+ Add Account.**
3. Enter Location and Account Information.



4. Once completed, click the **'Submit'**.
5. By clicking the Submit button, IAF CertSearch will send an activation link to the account email. The email holder is required to click on the link and sign up to activate the account.

Users

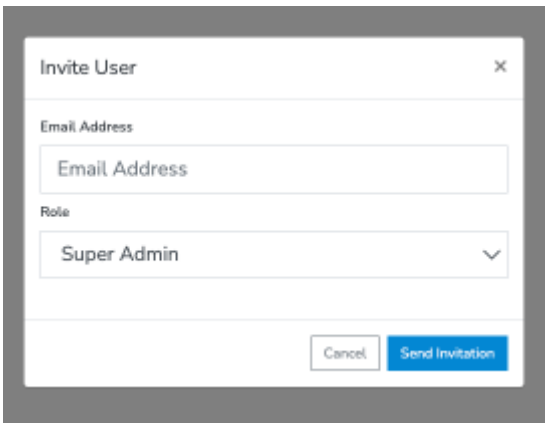
Here you can manage the users who access your account. In the Users area, you can see the users that belong to this Account. In the User area, you can view, or invite new users.

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:

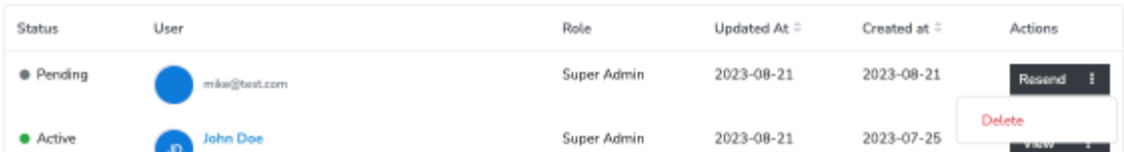
1. Click '**Users**' in the left-hand navigation.
2. Click the '**Invite User**' button
3. In the popup window, Input the email address and the role of the user



4. Once invited, an invitation to activate the IAF CertSearch account will be sent to the recipient.

Delete a 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.

Certification Body Profile

The Certification Body Profile page provides the ability to view and manage information about your organization. Here, you'll have access to the following:

- Certification Body Profile
- Accreditation Status
- Signed Agreements
- Live Profile

Certification Body Profile

This section has the information of the Certification Body. You can manage your logo, country/economy, website and description.

To manage your profile, click here.

Accreditation Status

This section has the accreditation information of the Certification Body. You'll have access to the following information: Accredited Status, Economy, Accreditation Body, Updated at, and Activity. This page is for viewing purposes only, only the AB who accredits the CB can have access to updating and managing the accreditation information.

Signed Agreements

The Signed Agreements page provides the ability to view all your signed agreements, in which you can see the Document Name, Version, Signed by, Position and Signed date.

Live Profile

The Live Profile page links you to the Public Certification Body Profile page, where your public information such as Accreditation Information, Company Description and Office Directories are shown.

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

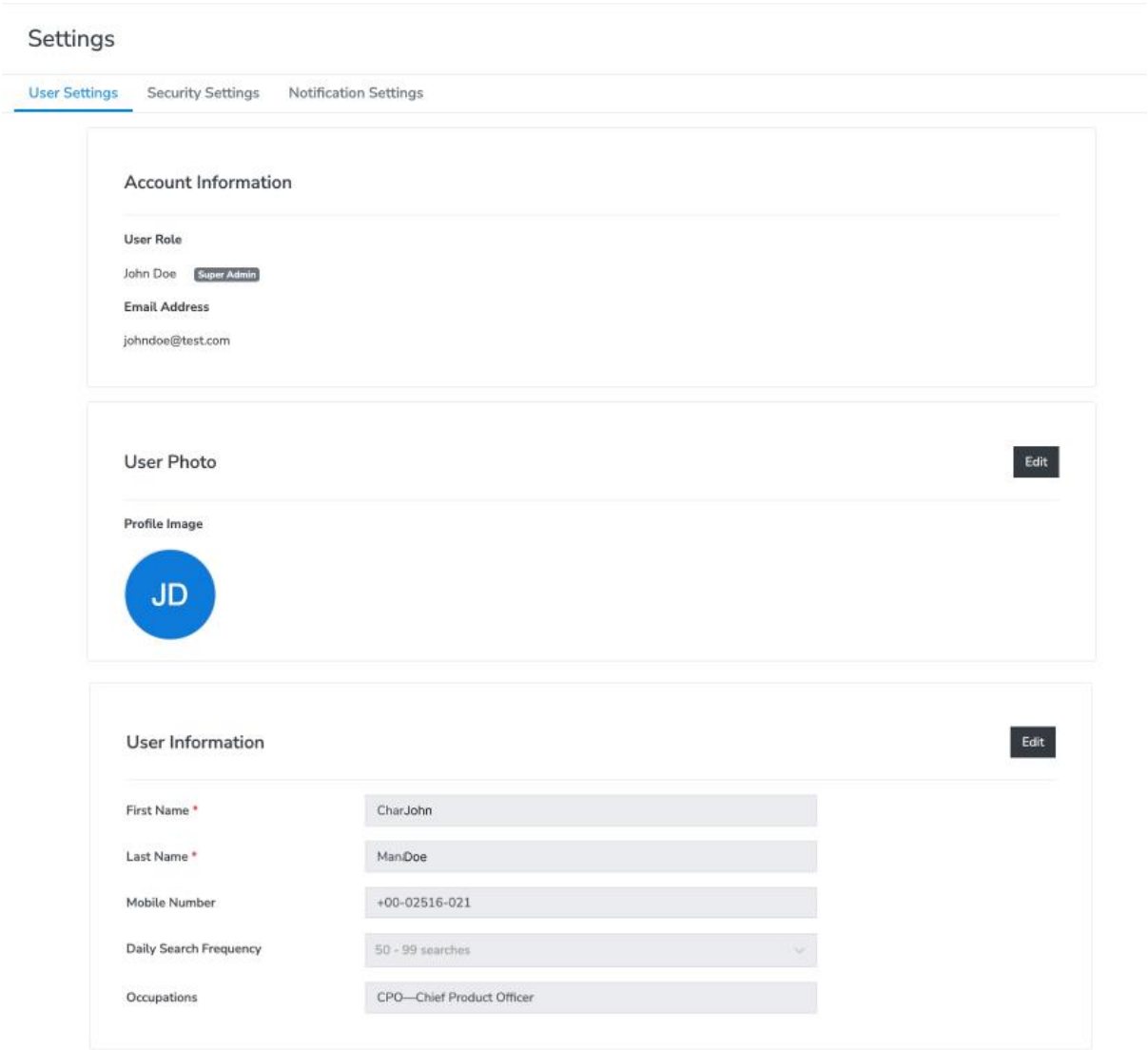
Where you can manage your password and login authenticators and view your activities. To manage your security settings, click here.

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

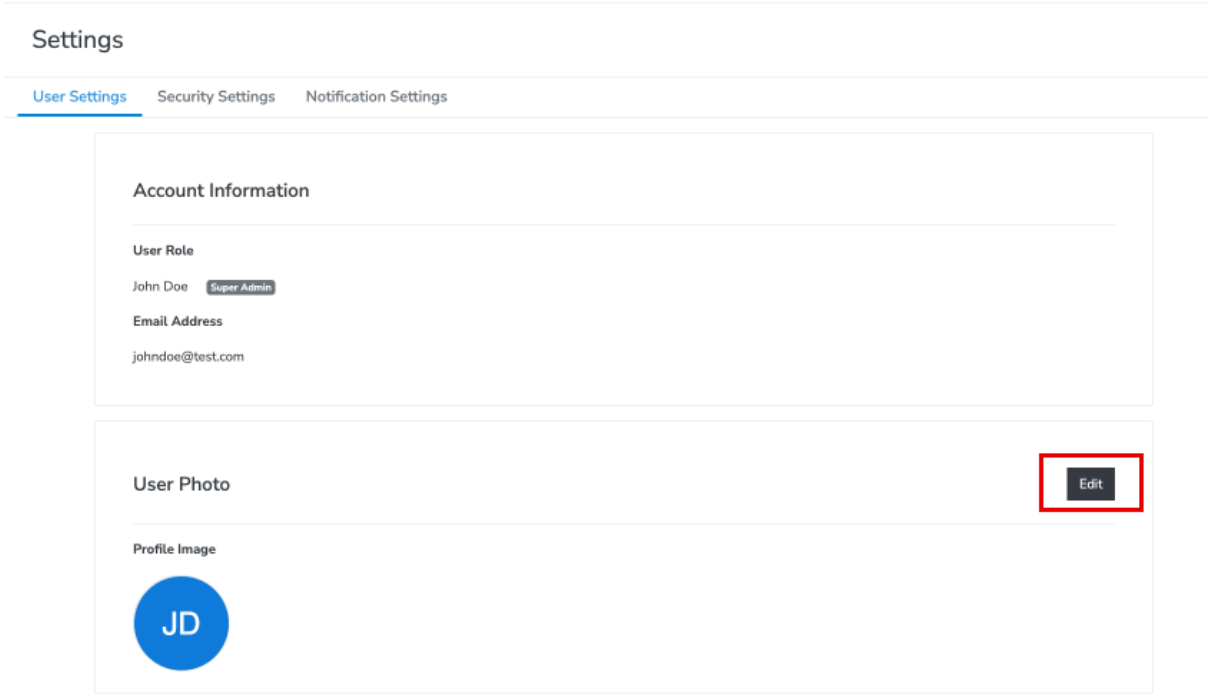
To view your User Settings, from the Dashboard click **'Settings'** in the left-hand navigation. Here, you can view your user role, email address, user photo, and user information.



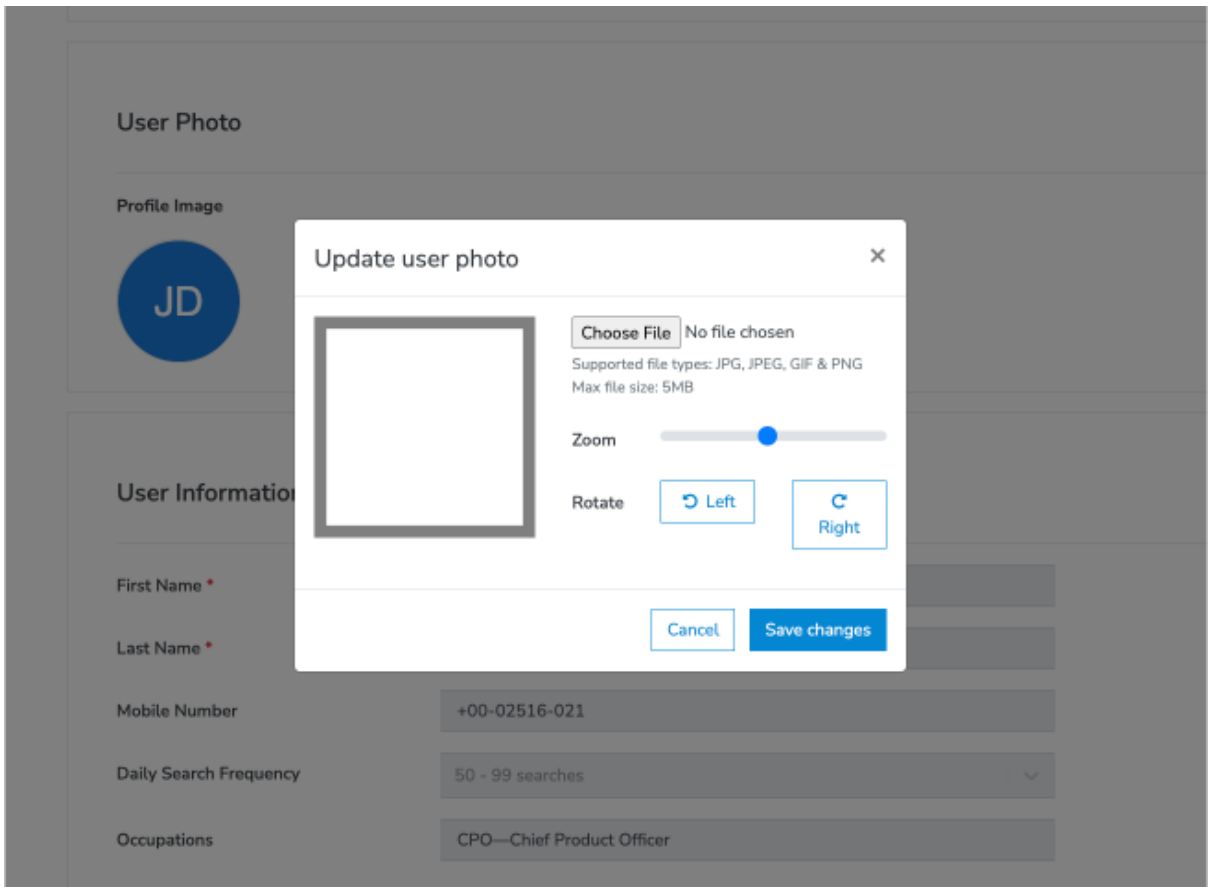
Add or Edit User Photo

To add or change your user photo

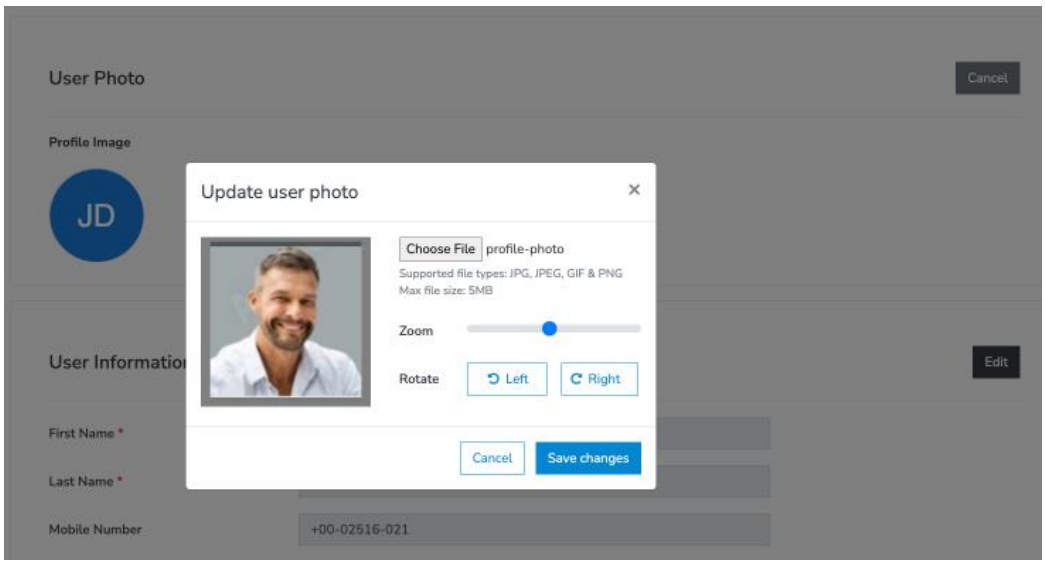
1. From the Dashboard, click '**Settings**' in the left-hand navigation
2. Click '**Edit**' in the User Photo section



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.

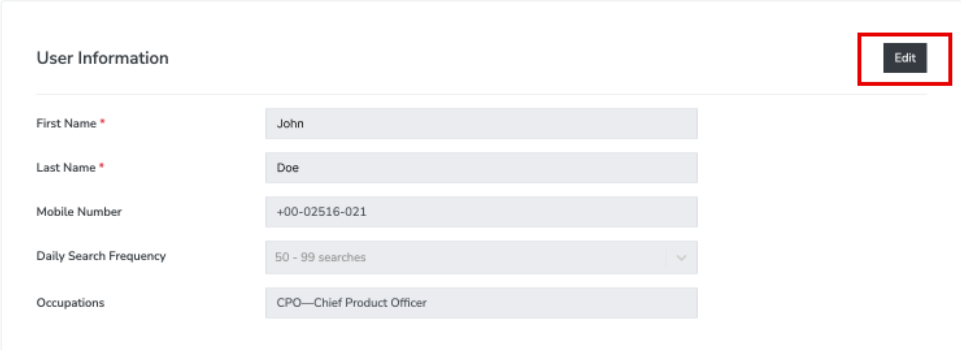


5. Click the '**Save Changes**' once done or click Cancel to revert changes

Edit User Information

To edit your user information:

1. From the Dashboard, click '**Settings**' in the left-hand navigation.

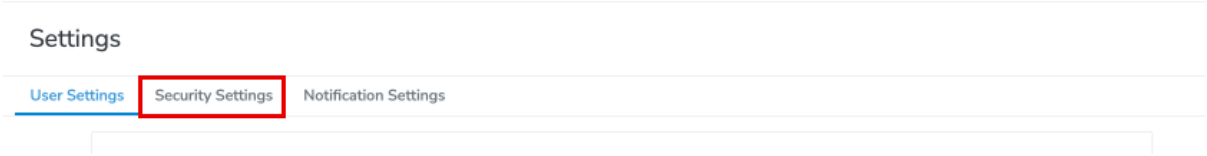


2. Click '**Edit**' in the User Information section
3. Update the fields you want to change
4. Once done, click the '**Save Changes**' button

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

Security Settings

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

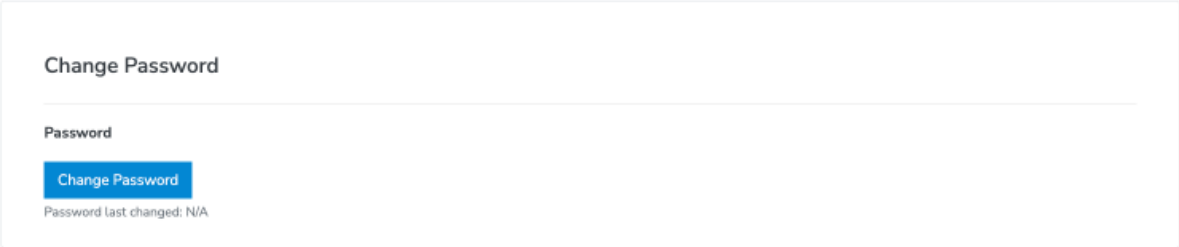


Here, you can change your password, set up your login authenticators and view your activities.

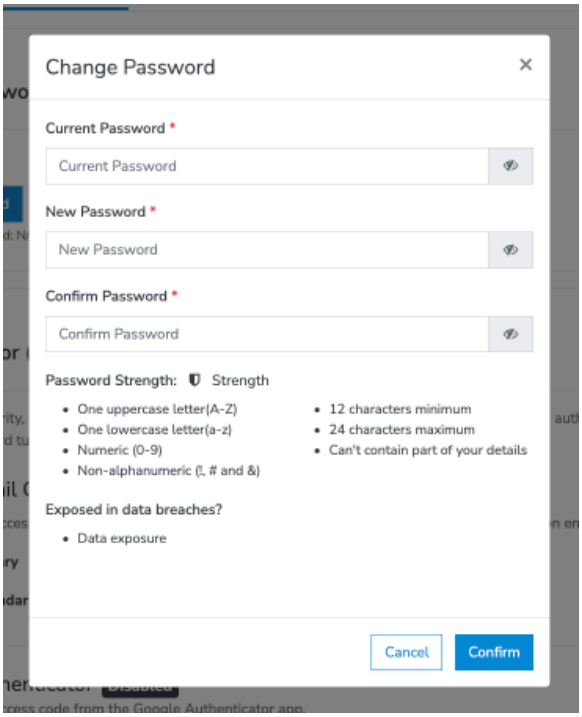
Change Password

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

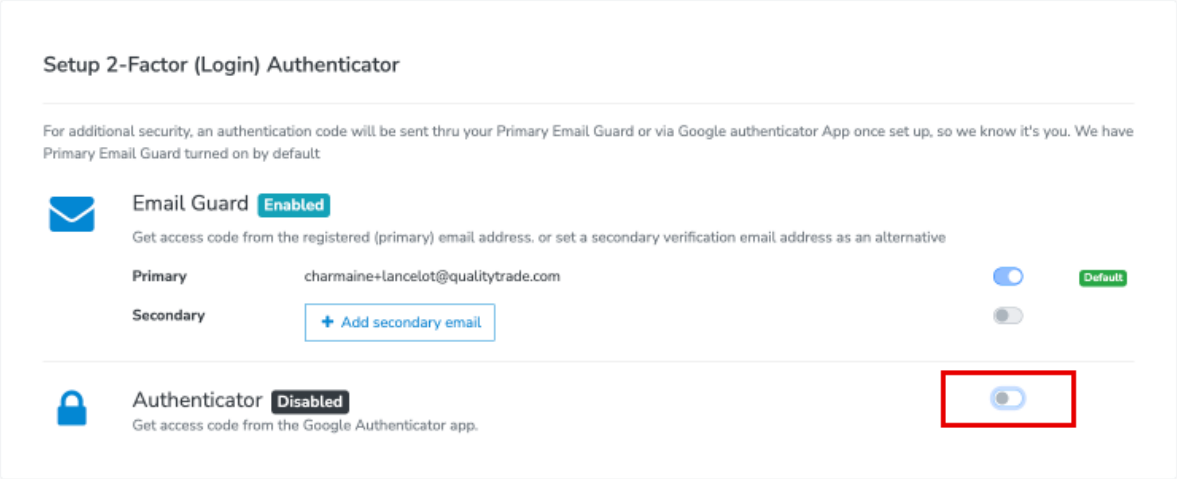
> Please note: Email guard authenticator is always required. If you happen to enable the Google Authenticator you'll just have an option which authenticator you want to use during login.

To manage your Google Authenticator:

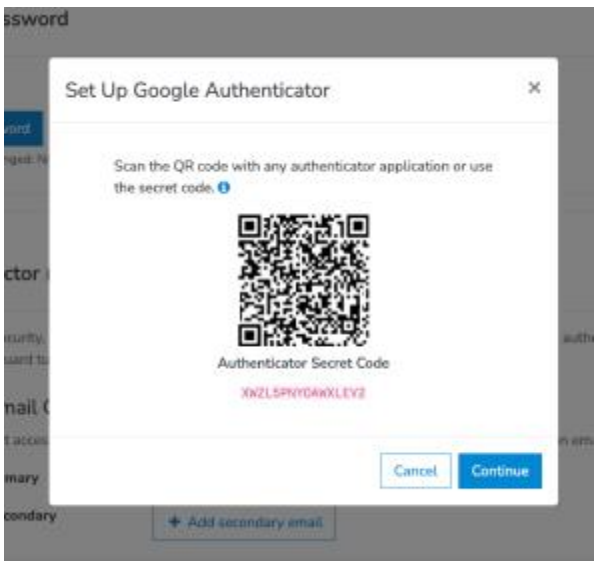
1. You will first need to download a Google Authenticator on your mobile to use this feature.

2. From the Dashboard, click '**Settings**' in the left-hand navigation.

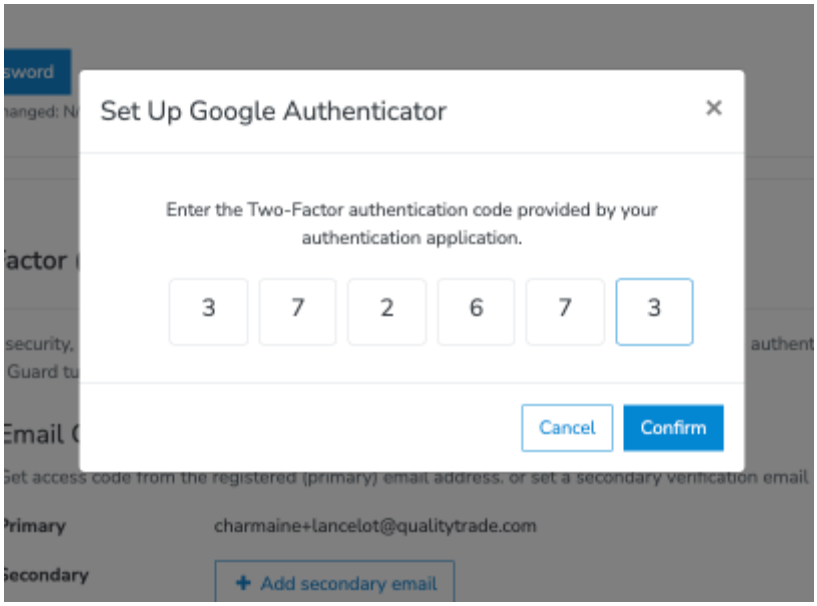
3. Click **'Security Settings'** in the menu bar.
4. Click the toggle button to enable the Google Authenticator



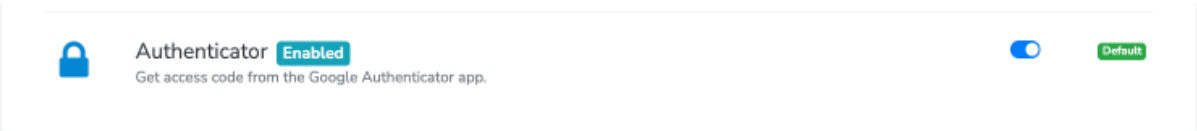
5. A pop-up window will appear with a QR code.
6. In your Google Authenticator app, add IAF CertSearch by scanning the QR code.



7. Once scanned click the **'Continue'** button
8. In the next screen, you will be asked to input the code which is generated from the Google Authenticator app.



9. Once added, click **'Confirm'**
10. The Google Authenticator app is now successfully enabled and is now activated every time you log in into IAF CertSearch.



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

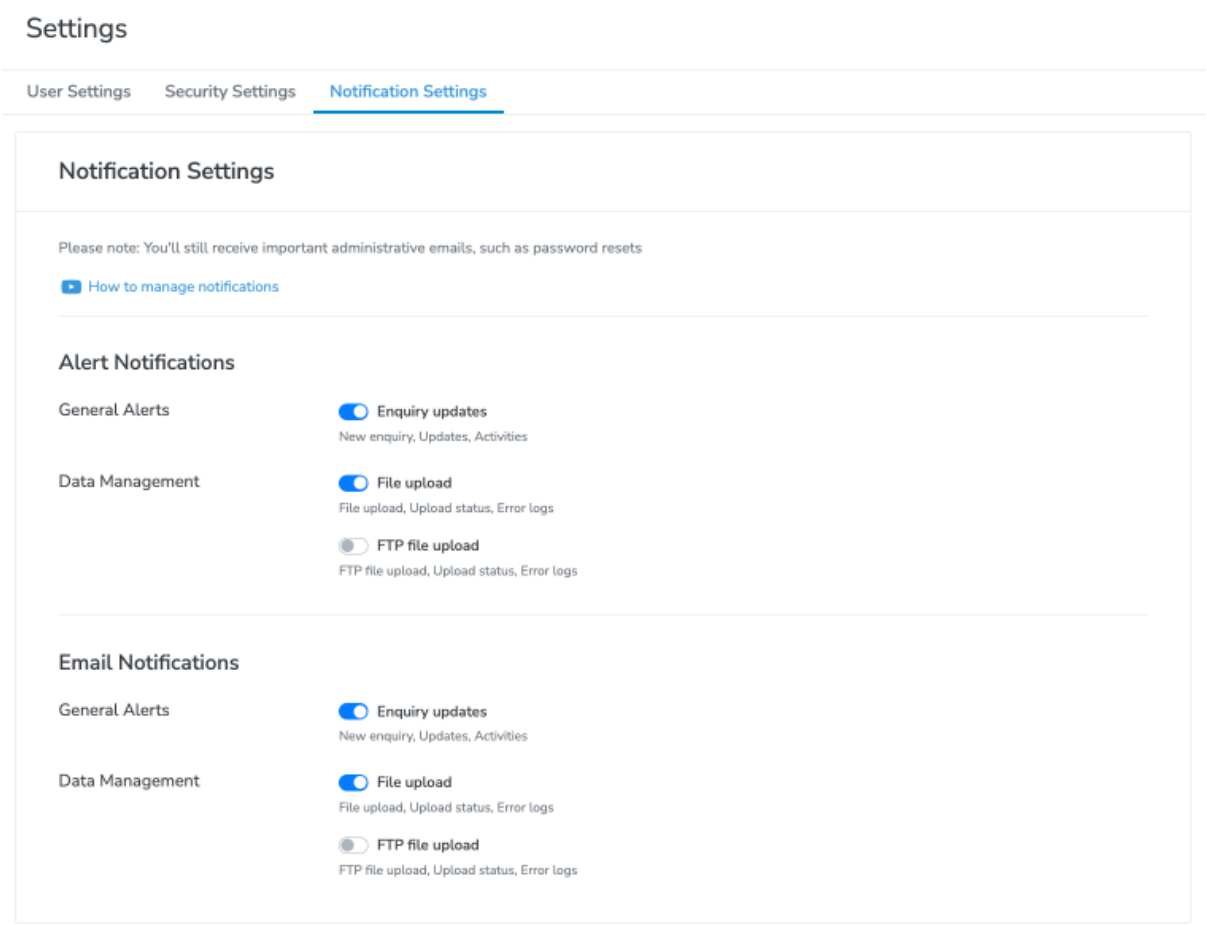
- General Alerts
    - Enquiry Updates - Alerts you on New Enquiries, Updates, and Activities
- Data Management
    - File Upload - Alerts you on File Uploads, Upload Status, and Error Logs
    - FTP Upload - Alerts you on File Uploads, Upload Status, and Error Logs

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**

Field Name Glossary

Certification Fields Glossary

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

Certification

Field Name		Description
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. ***Example:*** *AXB1234*
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. ***Example:*** *20897-A01*
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 ***Example:*** *Active*
Certification Type	Mandatory	Refers to the main scope of the certificate ***Example:*** *Management Systems*
Certification Scope	Optional	Specific description of the products, services, processes, or activities for which the Certified Entity has been granted certification. ***Example:*** *Manufacturing, marketing and export of instruments, consumables and accessories for temperature, active oxygen, hydrogen, carbon measurements and sampling in ferrous and non-ferrous melts*

Certification Original Issue Date	Optional	Date on which the certificate was first issued or granted to the Certified Entity ***Example:*** *20191120*
Certification Issue Date	Mandatory	Date on which the certificate was officially issued or granted ***Example:*** *20211123*
Certification Expiry Date	Mandatory	Date on which the validity of the certificate will come to an end. ***Example:*** *20251123*
Certified Entity Name	Mandatory	Name of the Certified Entity, individual, product, or service that has been granted certification. ***Example:*** *Test Food And Logistics Inc.*
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. ***Example:*** *Test Food*
Certified Entity English Name	Optional	English name of the Certified Entity, individual, product, or service that has been granted certification. ***Example:*** *Test Food And Logistics Inc.*
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. ***Example:*** *UNIQUEID-COMPANY01*
Certified Entity Street	Optional	Main address of the certified entity.

		Example: *S108/39 E Esplanade*
Certified Entity City	Optional	City of the main address of the certified entity. ***Example:*** *Sydney*
Certified Entity State	Optional	State of the main address of the certified entity. ***Example:*** *New South Wales*
Certified Entity Zipcode/Postcode	Optional	Zipcode/Postcode of the main address of the certified entity. ***Example:*** *2095*
Certified Entity Country/Economy	Mandatory	Country/Economy of the main address of the certified entity. ***Example:*** *Australia*
Certified Entity Website	Optional	Website of the certified entity. Must be http:// or https:// ***Example:*** *http://testfoodlogistics.co*

		m/
TAX ID	Optional	Tax ID or VAT number of the Entity
Company ID Number	Optional	Company ID Number of the Entity
Business Registration Number	Optional	Business Registration Number of the Entity
Accreditation Body Name	Mandatory	Name of the Accreditation Body ***Example:*** *United Kingdom Accreditation Service*
Accreditation Body Acronym	Mandatory	Acronym of the Accreditation Body ***Example:*** *UK*

Certification Additional Flelds

Field Name	Mandatory	Description
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.

		Example: *AXB1234*
Additional Site Street	Optional	Main address of the certified entity. ***Example:*** *S108/39 E Esplanade*
Additional Site City	Optional	City of the main address of the certified entity. ***Example:*** *Sydney*
Additional Site State	Optional	State of the main address of the certified entity. ***Example:*** *New South Wales*
Additional Site Zipcode/Postcode	Optional	Zipcode/Postcode of the main address of the certified entity. ***Example:*** *2095*
Additional Site Country/Economy	Mandatory	Country/Economy of the main address of the certified entity. ***Example:*** *Australia*
Additional Site Scope	Optional	Specific description of the products, services,

		processes, or activities for which the additional site has been granted certification. ***Example***: *Design, Development, Manufacture and Services of Chemical Products, Detergent and Softeners*

Certifications Standard and Scheme

Field Name	Mandatory	Description
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. ***Example:*** *AXB1234*
Scheme Name	Mandatory	Specific certification program or framework to which the certificate relates. ***Example:*** *Quality*

		Management Systems Scheme
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 ***Example:*** *ISO 9001:2008*

IAF CertSearch Dataset

Countries

Here's the list of acceptable country data from IAF CertSearch.

If your country data uses different values, you must match it to the standard country codes provided below:

Name	Code	Code_3
United States	US	USA
Canada	CA	CAN
Australia	AU	AUS
France	FR	FRA
Germany	DE	DEU
Iceland	IS	ISL
Ireland	IE	IRL
Italy	IT	ITA
Spain	ES	ESP
Sweden	SE	SWE
Austria	AT	AUT
Belgium	BE	BEL
Finland	FI	FIN
Czech Republic	CZ	CZE
Denmark	DK	DNK
Norway	NO	NOR

United Kingdom	GB	GBR
Switzerland	CH	CHE
New Zealand	NZ	NZL
Russian Federation	RU	RUS
Portugal	PT	PRT
Netherlands	NL	NLD
Isle of Man	IM	IMN
Afghanistan	AF	AFG
Aland Islands	AX	ALA
Albania	AL	ALB
Algeria	DZ	DZA
American Samoa	AS	ASM
Andorra	AD	AND
Angola	AO	AGO
Anguilla	AI	AIA
Antarctica	AQ	ATA
Antigua and Barbuda	AG	ATG
Argentina	AR	ARG
Armenia	AM	ARM
Aruba	AW	ABW
Azerbaijan	AZ	AZE
Bahamas	BS	BHS

Bahrain	BH	BHR
Bangladesh	BD	BGD
Barbados	BB	BRB
Belarus	BY	BLR
Belize	BZ	BLZ
Benin	BJ	BEN
Bermuda	BM	BMU
Bhutan	BT	BTN
Bolivia, Plurinational State of	BO	BOL
Bosnia and Herzegovina	BA	BIH
Botswana	BW	BWA
Bouvet Island	BV	BVT
Brazil	BR	BRA
British Indian Ocean Territory	IO	IOT
Brunei Darussalam	BN	BRN
Bulgaria	BG	BGR
Burkina Faso	BF	BFA
Burundi	BI	BDI
Cambodia	KH	KHM
Cameroon	CM	CMR
Cape Verde	CV	CPV

Cayman Islands	KY	CYM
Central African Republic	CF	CAF
Chad	TD	TCD
Chile	CL	CHL
China	CN	CHN
Christmas Island	CX	CXR
Cocos (Keeling) Islands	CC	CCK
Colombia	CO	COL
Comoros	KM	COM
Congo	CG	COG
Congo, the Democratic Republic of the	CD	COD
Cook Islands	CK	COK
Costa Rica	CR	CRI
Cote d'Ivoire	CI	CIV
Croatia	HR	HRV
Cuba	CU	CUB
Cyprus	CY	CYP
Djibouti	DJ	DJI
Dominica	DM	DMA
Dominican Republic	DO	DOM
Ecuador	EC	ECU
Egypt	EG	EGY

El Salvador	SV	SLV
Equatorial Guinea	GQ	GNQ
Eritrea	ER	ERI
Estonia	EE	EST
Ethiopia	ET	ETH
Falkland Islands (Malvinas)	FK	FLK
Faroe Islands	FO	FRO
Fiji	FJ	FJI
French Guiana	GF	GUF
French Polynesia	PF	PYF
French Southern Territories	TF	ATF
Gabon	GA	GAB
Gambia	GM	GMB
Georgia	GE	GEO
Ghana	GH	GHA
Gibraltar	GI	GIB
Greece	GR	GRC
Greenland	GL	GRL
Grenada	GD	GRD
Guadeloupe	GP	GLP
Guam	GU	GUM

Guatemala	GT	GTM
Guernsey	GG	GGY
Guinea	GN	GIN
Guinea-Bissau	GW	GNB
Guyana	GY	GUY
Haiti	HT	HTI
Heard Island and McDonald Islands	HM	HMD
Holy See (Vatican City State)	VA	VAT
Honduras	HN	HND
Hong Kong	HK	HKG
Hungary	HU	HUN
India	IN	IND
Indonesia	ID	IDN
Iran, Islamic Republic of	IR	IRN
Iraq	IQ	IRQ
Israel	IL	ISR
Jamaica	JM	JAM
Japan	JP	JPN
Jersey	JE	JEY
Jordan	JO	JOR
Kazakhstan	KZ	KAZ

Kenya	KE	KEN
Kiribati	KI	KIR
Korea, Democratic People's Republic of	KP	PRK
Korea, Republic of	KR	KOR
Kuwait	KW	KWT
Kyrgyzstan	KG	KGZ
Lao People's Democratic Republic	LA	LAO
Latvia	LV	LVA
Lebanon	LB	LBN
Lesotho	LS	LSO
Liberia	LR	LBR
Libyan Arab Jamahiriya	LY	LBY
Liechtenstein	LI	LIE
Lithuania	LT	LTU
Luxembourg	LU	LUX
Macau	MO	MAC
North Macedonia	MK	MKD
Madagascar	MG	MDG
Malawi	MW	MWI
Malaysia	MY	MYS
Maldives	MV	MDV

Mali	ML	MLI
Malta	MT	MLT
Marshall Islands	MH	MHL
Martinique	MQ	MTQ
Mauritania	MR	MRT
Mauritius	MU	MUS
Mayotte	YT	MYT
Mexico	MX	MEX
Micronesia, Federated States of	FM	FSM
Moldova, Republic of	MD	MDA
Monaco	MC	MCO
Mongolia	MN	MNG
Montenegro	ME	MNE
Montserrat	MS	MSR
Morocco	MA	MAR
Mozambique	MZ	MOZ
Myanmar	MM	MMR
Namibia	NA	NAM
Nauru	NR	NRU
Nepal	NP	NPL
Netherlands Antilles	AN	ANT
New Caledonia	NC	NCL

Nicaragua	NI	NIC
Niger	NE	NER
Nigeria	NG	NGA
Niue	NU	NIU
Norfolk Island	NF	NFK
Northern Mariana Islands	MP	MNP
Oman	OM	OMN
Pakistan	PK	PAK
Palau	PW	PLW
Palestinian Territory, Occupied	PS	PSE
Panama	PA	PAN
Papua New Guinea	PG	PNG
Paraguay	PY	PRY
Peru	PE	PER
Philippines	PH	PHP
Pitcairn	PN	PCN
Poland	PL	POL
Puerto Rico	PR	PRI
Qatar	QA	QAT
Reunion	RE	REU
Romania	RO	ROU
Rwanda	RW	RWA

Saint Barthelemy	BL	BLM
Saint Helena	SH	SHN
Saint Kitts and Nevis	KN	KNA
Saint Lucia	LC	LCA
Saint Martin (French part)	MF	MAF
Saint Pierre and Miquelon	PM	SPM
Saint Vincent and the Grenadines	VC	VCT
Samoa	WS	WSM
San Marino	SM	SMR
Sao Tome and Principe	ST	STP
Saudi Arabia	SA	SAU
Senegal	SN	SEN
Serbia	RS	SRB
Seychelles	SC	SYC
Sierra Leone	SL	SLE
Singapore	SG	SGP
Slovakia	SK	SVK
Slovenia	SI	SVN
Solomon Islands	SB	SLB
Somalia	SO	SOM
South Africa	ZA	ZAF
South Georgia and the	GS	SGS

South Sandwich Islands		
Sri Lanka	LK	LKA
Sudan	SD	SDN
Suriname	SR	SUR
Svalbard and Jan Mayen	SJ	SJM
Swaziland	SZ	SWZ
Syrian Arab Republic	SY	SYR
Chinese Taipei	TW	TWN
Tajikistan	TJ	TJK
Tanzania, United Republic of	TZ	TZA
Thailand	TH	THA
Timor-Leste	TL	TLS
Togo	TG	TGO
Tokelau	TK	TKL
Tonga	TO	TON
Trinidad and Tobago	TT	TTO
Tunisia	TN	TUN
Turkey	TR	TUR
Turkmenistan	TM	TKM
Turks and Caicos Islands	TC	TCA
Tuvalu	TV	TUV
Uganda	UG	UGA

Ukraine	UA	UKR
United Arab Emirates	AE	ARE
United States Minor Outlying Islands	UM	UMI
Uruguay	UY	URY
Uzbekistan	UZ	UZB
Vanuatu	VU	VUT
Venezuela, Bolivarian Republic of	VE	VEN
Vietnam	VN	VNM
Virgin Islands, British	VG	VGB
Virgin Islands, U.S	VI	VIR
Wallis and Futuna	WF	WLF
Western Sahara	EH	ESH
Yemen	YE	YEM
Zambia	ZM	ZMB
Zimbabwe	ZW	ZWE
Kosovo	XK	XKX

Certification Sites

The certification sites type dataset in the IAF CertSearch database:

Site Type
Main Site
Additional Site

Certification Status

The certification status dataset in the IAF CertSearch database:

Status
Active
Inactive
Suspended
Cancelled
Draft
Withdrawn
Cbwithdrawn
Expired