



Innovate to Integrate

e-Cert World Web Application

Exporter Users Guide

Version: 1.0



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1 e-Cert World

The e-Cert World web site is a fully interactive web service which includes many resources to assist you with your certified documents. The site includes;

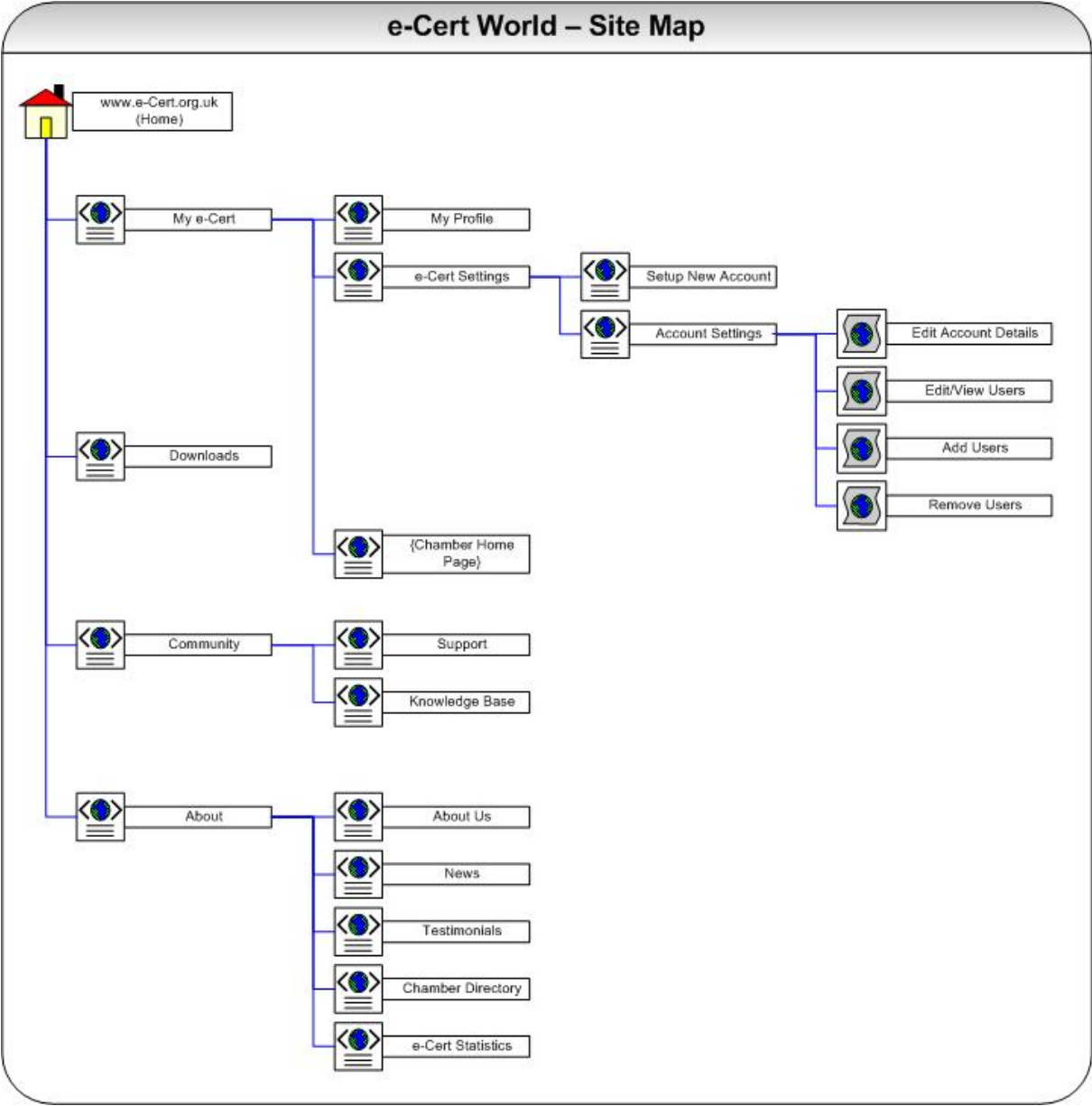
- Easy access to e-Cert for Certified documents
- 'Community Support' User forums and Knowledge Base
- Multiple account management
- Chamber of Commerce information & online Formal Undertaking



Figure 1: e-Cert World

1.1 e-Cert World Site Map

The following site map will help you navigate the web site.



1.2 Registration

To use features of the web site and use e-Cert for your certified documents, you're required to register as a user by completing the form displayed below. Once you submit your data a verification email will be sent to your registered email address to confirm your details.

To complete the registration process and gain access to the e-Cert World web site, you must click the link in the verification email and log into the web site.

The screenshot displays the 'User Registration' page of the e-Cert World application. At the top, there is a navigation menu with 'Home', 'Downloads', 'Community', and 'About'. Below this, a breadcrumb trail shows 'My e-Cert > My Profile'. A progress indicator shows four steps: '1. User Registration' (highlighted), '2. Account Selection', '3. Account Setup', and '4. Formal Undertaking'. The main content area features a 'Register User' button and a 'User Guide' link. The registration form includes the following fields: 'Email Address/Username:-', 'Confirm Email Address:-', 'Password:-', 'Confirm Password:-', 'First Name:-', 'Last Name:-', and 'Display Name:-'. A note states: 'The registration process requires that email addresses are verified. A verification email will be sent to the registered address for confirmation.' Below the form, there is a checkbox for 'I would like to receive a regular newsletter from the e-Cert World containing the latest industry news:' and a 'Verification Code:-' field with a CAPTCHA image showing '525TB'. At the bottom left, there is an 'Accept Terms & Conditions?-' checkbox and a 'Register' button. On the right side, a 'Registration Help' section provides a 'Step by Step Guide' with instructions for each step: Step 1 - User Registration, Step 2 - Account Selection, Step 3 - Account Setup, and Step 4 - Formal Undertaking.

Figure 1.1: User Registration

Required Data;

- **Email Address:** Enter a valid email address, email validation is required
- **Password:** Enter a secure password; the system suggests the strength of your chosen password
- **First Name:** Your given name
- **Last Name:** Your surname
- **Display Name:** Your chosen display name, used in user forums etc.
- **Validation Code:** Confirm the validation code displayed on screen
- **Terms & Conditions:** Please confirm you have read and accepted the web site terms & conditions

1.3 Manage e-Cert Company Accounts

Once you have registered as a user and have successfully logged in, you will be offered the chance to setup or join an e-Cert Company Account. Before you can create and submit applications for certified documents you will need to belong to an e-Cert Company Account.



Figure 1.2: Setup e-Cert Account

Select the account you would like to setup;

- *Chamber of Commerce Account* – This is for chambers of commerce that don't already offer e-Cert for their customers.
- *Exporter Account* – Accounts for exporters that would like to submit applications for certified documents to their chamber of commerce online.

1.3.1 Create New or Join Existing Account

When you want to setup e-Cert you have two options;

- *Create a new e-Cert account* – Select this option if your company isn't already using e-Cert for their certified documents.
- *Join an existing account* – Select this option if your company is already using e-Cert for their certified documents and you want to join their e-Cert account.

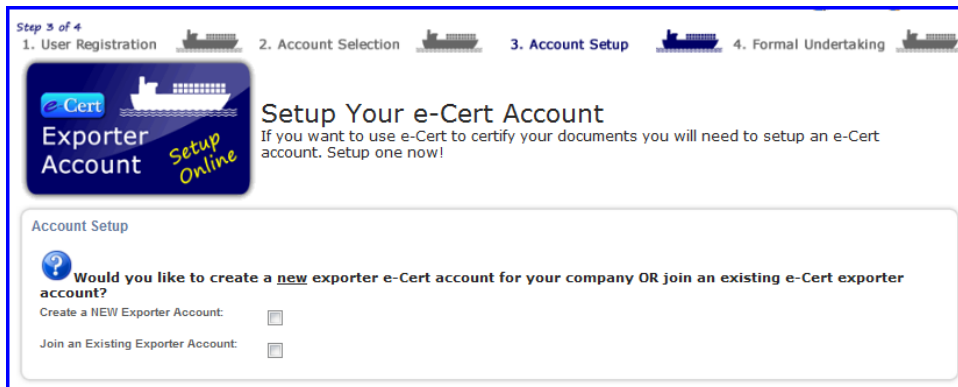


Figure 1.2.a: New Account?

NOTE: You can click the help icons to view online help

1.3.2 Setup New Account

When you create a new Company Account you will need to provide some additional information about your company.

The user who creates a new Account will automatically become the Administrator of that Account and will have access to the Account Settings.

Step 3 of 4
1. User Registration 2. Account Selection 3. Account Setup 4. Formal Undertaking

Setup Your e-Cert Account
If you want to use e-Cert to certify your documents you will need to setup an e-Cert account. Setup one now!

Account Setup

Would you like to create a new exporter e-Cert account for your company OR join an existing e-Cert exporter account?

Create a NEW Exporter Account:

Join an Existing Exporter Account:

Please enter the required details below, these details will be used for the e-Cert company account.

Select a Chamber to Use: Find your local e-Cert Chamber, [Click Here](#)

Contact Email Address:

Your Full Name:

Job Title:

Company Name:

Street:

City:

Region/County:

Post Code:

Country: United Kingdom

Telephone Number:

Fax Number (optional):

I Accept Terms & Conditions: [e-Cert Terms and Conditions](#)

Figure 1.2.b: New Account?

The following information should be provided;

Select a Chamber to Use – Select the chamber of commerce you wish to file documents with

Contact Email Address – The contact email address for the account (used in e-Cert)

Your Full Name – Your full name

Job Title – Your job title

Company Name – Your company name

Company Address Fields – Your companies contact address (used in e-Cert)

Telephone Number – Your Company contact number

Fax Number – Your company fax number

You must read and accept the terms and conditions of use for e-Cert before you can submit your details and create the account.

NOTE: Once your account has been created you will need to complete a Formal Undertaking agreement and file it with your chosen chamber of commerce before you can access your e-Cert account.

1.3.3 Join Existing Account

If you choose to join an existing e-Cert account you can provide the email address of the Account Administrator. An email will be sent to the Administrator asking to give you access to the account.

Figure 1.2.c: Join an Account

NOTE: If you don't know the Administrators email address you will need to contact them directly and ask for access to the account.

2 My e-Cert (Exporters)

My e-Cert is the user menu which is only visible to logged in users. Users have access to the following;

- My Profile
- e-Cert Settings
- Change Password
- [Your Chamber Pages] (for your e-Cert Company Accounts)

The **e-Cert Settings** menu option enables users to setup a new Company Account or join an existing account. The user who sets up the Company Account will automatically become the Administrator for that Account. Administrators have access to an additional “Account Settings” option where they can manage their Company Account, add new users or make other users Administrators.

The ‘My e-Cert’ page is visible to users who belong to one or more e-Cert Accounts. It displays a list of chambers that you currently use together with the chamber details. You can click the button to access the chambers home page or click the link to create a Formal Undertaking.

You must have a current Formal Undertaking with the Chambers of Commerce that will be certifying your documents.



Figure 2: My e-Cert

NOTE: If you are unable to access your chosen chambers home page, this may be because you don't have a Formal Undertaking agreement in place with the chamber. Use the 'Complete Formal Undertaking' option to create one. Once created, the Formal Undertaking will be delivered to you by email for signing and forwarding to your Chamber of Commerce.

2.1 My Profile

The 'My Profile' screen allows you to update and maintain the personal profile information with which you registered. You can also manage your notification settings for receiving newsletters from e-Cert World using this screen.

My e-Cert World Profile
Keep your information and notification settings up to date.

User Guide

Email Address/Username: adam.underwood@underco.co.uk

First Name: Adam

Last Name: Underwood

Display Name: Adam

Street: Street

City: dfgdg

County: dgdg

Postal Code: dfgdg

Country: United Kingdom

Work phone: dgdfgd

I would like to receive a regular newsletter from the e-Cert World containing the latest industry news: Remove tick from box to unsubscribe to the newsletter.

Update **Delete A/C**

Registration Help

Step by Step Guide
You must follow these steps in order to start using e-Cert

Step 1 - User Registration
Register as an e-Cert User to access the community and participate in user forums.

Step 2 - Account Selection
Users must join an e-Cert Company Account from which to apply for certified documents.
You can choose to join an existing Company Account OR setup a new Company Account.

Step 3 - Account Setup
To setup a new Company Account you must add account information here.

Figure 2.1: My Profile

2.2 My Chamber Pages

After a successful login into the web site you are automatically redirected to the home page for your Chamber of Commerce. If you are a member of multiple chambers then you can access these from the 'My e-Cert' menu, and from this page you can conveniently, and securely, access your e-Cert account.

It is possible to belong to multiple e-Cert Company Accounts. The drop-down list will contain all of your Company Account options, from which you can select the required Company Account and click the 'Login' button to access the account



Figure 2.2: Your Chamber Home Page

2.3 e-Cert Settings

From e-Cert Settings you can set up or join another Company Account.

Accounts Administrators have access “Account Settings” enabling them to manage their Account.

To manage the e-Cert Company Account, click the ‘Account Settings’ button.



Figure 2.3: New Account?

2.3.1 Account Settings

You can edit the account details, edit or view users, add users and remove users in the ‘Account Settings’ page. To proceed you must select the Company Account you want to manage and also select the action you wish to perform, then click the ‘Submit’ button.



Figure 2.3.a: e-Cert Settings, Select Account

2.3.2 Edit Account Details

You can modify your e-Cert account details on this page. These details are used in e-Cert as the Exporter details.

e-Cert Account Settings

You can manage your e-Cert account details here, this information will be used for any account queries.

e-Cert - Edit Account Details

Update your e-Cert account details and then click save.

Selected Account:

Account Description:

Company Name:

Street:

City:

Region/County:

Post Code:

Country:

Contact Full Name:

Contact Email Address:

Contact Telephone:

Contact Fax:

Figure 2.3.b: e-Cert Settings, Account Maintenance

Account Description – This is the name used in the account selection when from the chamber home page.

Company Name – Your company name

Company Address Fields – Your companies contact address

Contact Full Name – Your full name

Contact Email Address – The contact email address for the account

Contact Telephone – Your Company contact number

Contact Fax – Your company fax number

2.3.3 Edit/View User

When you edit or view users for the selected e-Cert account, the following page is displayed;

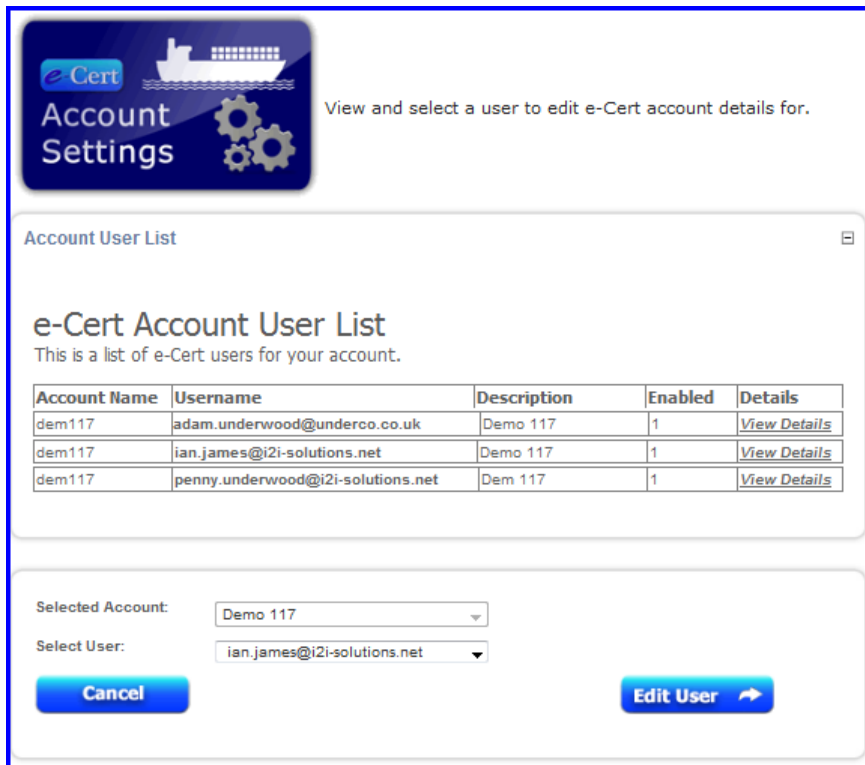
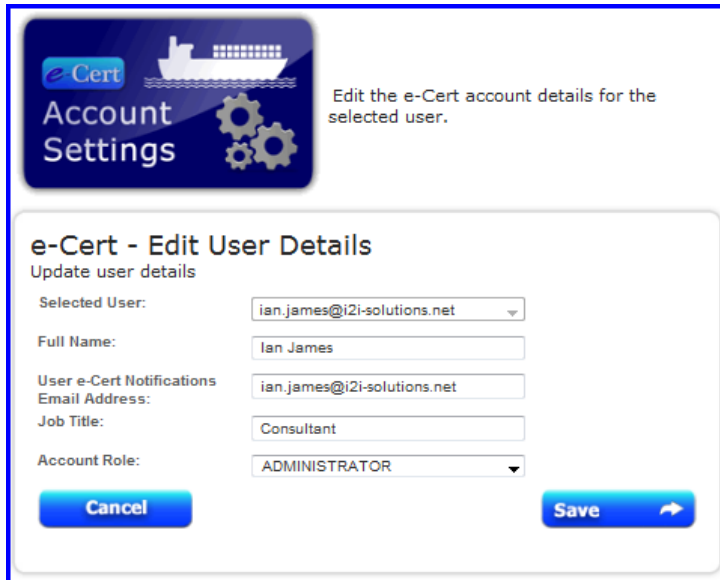


Figure 2.3.c: e-Cert Settings, Edit/View User

This screen displays a list of users that are already members of the e-Cert Account, using this screen you can view the details of each of the users, or you can select one of those users and edit their e-Cert account settings by clicking 'Edit User'.

2.3.4 Edit User

If you have selected to edit a user then another page is displayed which will allow you to modify the selected user's e-Cert Account settings.



The screenshot shows a web application interface for editing user details. At the top left is a dark blue header with the 'e-Cert' logo, a ship icon, and the text 'Account Settings' next to gear icons. To the right of the header, it says 'Edit the e-Cert account details for the selected user.' Below this is a white form titled 'e-Cert - Edit User Details' with the subtitle 'Update user details'. The form contains several input fields: 'Selected User:' with a dropdown menu showing 'ian.james@i2i-solutions.net'; 'Full Name:' with a text box containing 'Ian James'; 'User e-Cert Notifications Email Address:' with a text box containing 'ian.james@i2i-solutions.net'; 'Job Title:' with a text box containing 'Consultant'; and 'Account Role:' with a dropdown menu showing 'ADMINISTRATOR'. At the bottom of the form are two buttons: a blue 'Cancel' button on the left and a blue 'Save' button with a right-pointing arrow on the right.

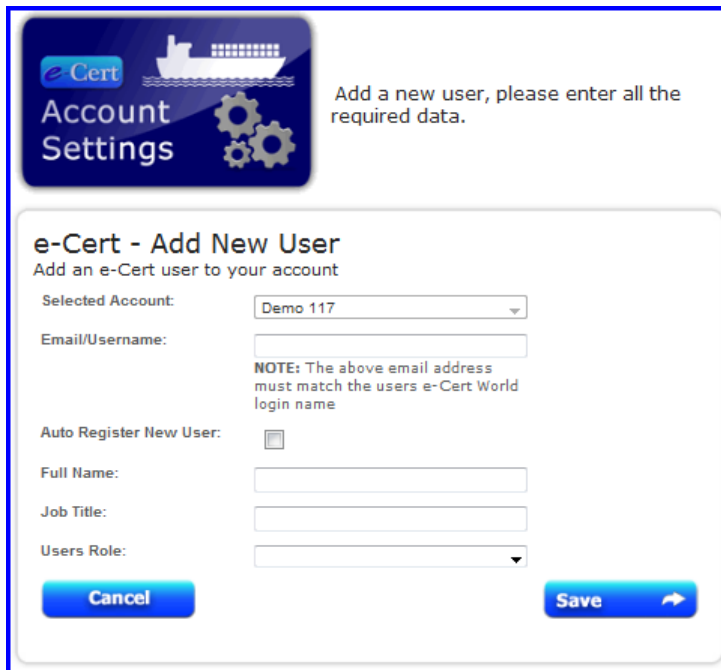
Figure 2.3.d: e-Cert Settings, Edit User

When you have completed your changes you must click 'Save' to confirm your changes.

If you have changed the users Account Role to 'Administrator' then the user will be given access to the 'e-Cert Settings' menu and the administrator functions in e-Cert. Likewise if you change their Account Role to any other role then the user will be denied access to the administrator functions.

2.3.5 Add User

If you choose to add a user to the e-Cert account then the following page is displayed where you are required to enter the new user details;



The screenshot shows a web application interface for adding a new user. At the top left is a logo for 'e-Cert Account Settings' featuring a ship and gears. To the right of the logo, a message reads: 'Add a new user, please enter all the required data.' Below this is a form titled 'e-Cert - Add New User' with the subtitle 'Add an e-Cert user to your account'. The form contains the following fields: 'Selected Account' (a dropdown menu showing 'Demo 117'), 'Email/Username' (a text input field), 'Auto Register New User' (a checkbox), 'Full Name' (a text input field), 'Job Title' (a text input field), and 'Users Role' (a dropdown menu). At the bottom of the form are two buttons: 'Cancel' and 'Save'.

Figure 2.3.e: e-Cert Settings, Add New User

- Selected Account – This field is read only and will display the selected e-Cert account.
- e-Cert World Email/Username – This should be should be the users email address, if the email address isn't already registered on the web site then you will be prompted to auto register the user after you click the 'Save' button.
- Full Name – Then users full name.
- Job Title – The users job title.
- Users Role – Select the required user access for the new user.

When the save button is clicked the details are saved and the user account is created.

NOTE:

When you receive a request to join your Company Account you should use this option to add the details of the new user to your Account.

2.4 Remove User

You can remove users from your account which will prevent them from accessing your account. Select a user to remove and click the 'Delete' button.



Figure 2.4: e-Cert Settings, Remove User

2.5 Change Password

All users have the ability to change their own password as regularly as required. The web site doesn't force a regular password change but it is advised that passwords are changed regularly to prevent any unauthorised access.

The following screen is used to change your user password.

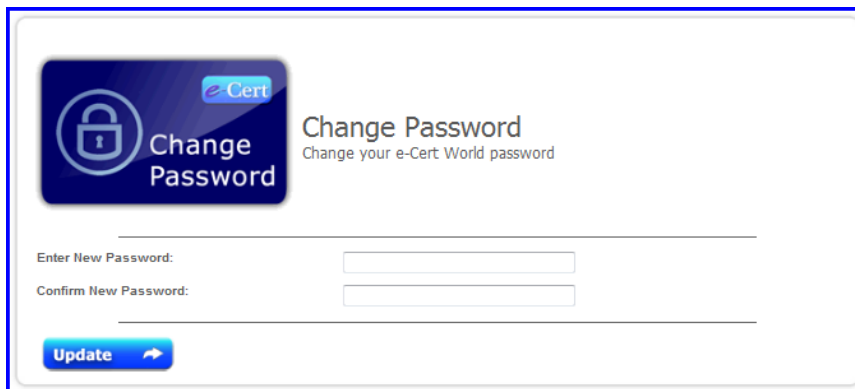


Figure 2.5: Change Password