A Quick Reference Guide



Managing Certifications

Initiating a certification action

The Equipment Certification platform enables you to create a new certification application, modify, renew or transfer existing certifications. These actions are available from the Navigation panel



To view your certification activity:

When an activity is initiated

- Each certification action is assigned a case number fo easier identification:
 - New Certificate: New-1
 - Modifications: Mod-1
 - Renewals: Ren-1
 - Transfer: Trs-1
- A case summary is created providing key information about the case as the data is captured
- You can perform some certification management tasks via the Actions drop down, such as:
 - Withdraw or cancel a case (before it is submitted), or
 - Re-assign a case to a team member or full consultant you have linked to your business, or
 - Send to a Limited consultant you have linked to your business

New-413	D	☆	
Access Token	Actions 🔹		
Status	NEW		
Applicant	KC Trading		
Contact person	Kim Cadigan		
Approval no.			
Expiry date			
Equipment class			
Equipment type			
Regulator			
Lead time			
Application fee			
Submission date			

Refresh Re-assign case Send to limited consultan... Withdraw/Cancel Tags Notifications History Bookmark to recents



To use the certification screens:

Processes guide you on what to do and sub-processes indicate the stage you are at

Appry Payn	ent Assessment Review	Approval	Resolve
Certification Type			
Applicant Certification type	Equipment details Manufacturers	Test reports Documents	Review and Submit
Certification type Equipment and certificate			_ ↓
Equipment type *	Class 		
This search box lists level 2 and 3 equipments only. App	ly for level 1 or out of scope equipment here		
Certificate Type	6 Equipment Details		
	Applicant Certification type Equipment	details Manufacturers. Test reports	Documents Review and Sub
he field headings	Equipment details Equipment family details		
nd symbols (such	Equipment family details		
	Protection against electric shock *	Type of attachment	
s drop downs and	Class I	← Type X	~
ool tins) guide vou	Type of fixing *	Type of operation	J.
sol tips) guide you	Type of use	Jerettin	
	Select	~	
s you complete			

Ensuring complete data

The Equipment and Certification platform supports a comprehensive set of data to be captured for products, providing a 'Drag and Drop' feature for easy upload.

This enables you to keep the original filename and you can replace or remove an existing image under the

an upload images in jpg	g or png format at maximum 1 MB	Nameplates	>
	Ø	Upload new Nameplates library	
	Drag and drop files here of Select file(s)	If you wish to replace an existing image, please Click 'Keep the original file name' to keep the na	upload a file with the same name. ame of the file.
Name	File	Rating Label JMN Ntahonkir • 17/08/2021 02:02	
Rating Label	Rating Label.jpg		



- Types of data that can be added:
 - Additional product information
 - Equipment profiles
 - Pictures of example products
 - Pictures of name plates
- Maximum file size: 10mb (an error message will appear is a file exceeds this limit)
- File types supported: .doc, .xls, .ppt, .pdf
- Nameplate and product examples: support .jpg only

B Retrieving certificates from current

As Applicants, you will need to pull your existing Equipment Certificates into this platform.

You will need to do this for each set of 'old' user ID and password you previously used for associated certificates

To retrieve existing Equipment Certificates:

•	Click on Retrieve Certificates from Navigate or the button on the main	Q	\$\$ EESS Platform		
	screen when you first log-in	×	Equipment Certification		et up: Is to work together on the platform and retrieve your existing certifications. The a consultancy business Retrieve certificates police constructions
		•	Renew Transfer Retrieve Certificates		Business administrator

• Enter your the log-in details you used for the previous database

Link Certificates		Resolve	
Retrieve certifications			
Authenticate business			Verify
To retrieve your existing certificates, you need to authenticate enter the username and password for the Old Equipment Certification Databas if you have more than one Old Equipment Certification Databas you will need to repeat this exercise to retrieve those certificat	your business. To do this, fication Database. Please note ie username and password, es associated with that profile.		
Old Equipment Certification Database username *			
Old Equipment Certification Database password *			
Cancel		Save	Continue

Note: you will need to do this for each 'old' user ID and password and associated certificates



To validate your 'old' log-in details:

- A verification code is sent to your email registered in the Legacy database with the below message
- Enter the code in the EESS platform

You are nearly there! Your certificates are almost retrieved.

Go back to the EESS platform and enter the verification code below. 927550

4 Accessing certificates

To access your certificates:

to certific	ates	es via Na	vigation		Q	Search			
All retriev will be lis	/ed and i ted here	new cert	ificates		+	Equip	ment Certific	cation)
Use the F specific co the fields you have	ilter feat ertificate . This is v a long li	ture to se es using a very hand st of cert	earch for any one o dy when ificates –	f		Home My or	e ganisation		
						Certif	icates		
Certificate number	Equipmer	nt type	Model	Trade name	Filter	Certif	icates		
Certificate number	Equipmer	nt type	Model	Trade name	Filter	Certif	icates ÷ Density	C Refresh	
Certificate number	Equipmer Applicant company	nt type Consultant company	Model Equipment type	Trade name Equipment sub type	Filter Group Equipment level	Certif ØFields Expiry date	icates ÷ Density Certificate status	C Refresh Certifier	