



IECEX OD 011-10

Edition 1.0 2019-09

IECEX Operational Document

**IEC System for Certification to Standards relating to
Equipment for use in Explosive Atmospheres**

OD 011-10

**Guidance on Use of the IECEx Internet based “On-Line”
Certificate of Conformity System**

**Part 10: IECEx On-line Certificate System (OCS) – Second
Generation – “Back Office” Operation**

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INTERNATIONAL ELECTROTECHNICAL COMMISSION

IECEX Certified Equipment Scheme covering equipment for use in explosive atmospheres – IECEX Online Certificate System (OCS), Second Generation – Operation of IECEX OCS “Back Office”

1 Scope

This IECEX Operational Document explains the features and operation of the “Back Office” of the second generation IECEX On-line Certificate System (IECEX OCS). The IECEX OCS “Back Office” is only accessible by the IECEX Secretariat and by IECEX ExCB staff that have been provided with access username/email, password and appropriate access level rights.

2 Normative references

Nil.

3 Definitions

Nil.

4 General Instructions

4.1 General Access Principles

Access to the IECEX OCS requires a user to have a unique ID that includes a Login name, a password and a valid personal email address. ExCB and ExTL users, once created, are assigned either **ExCBAdmin** level access rights (that enables them to draft, edit and issue reports and certificates) or **ExCBBasic** level access rights (that enables them to only draft or edit drafts of reports and certificates)

4.2 Administrator Access

The access to the IECEX OCS for IECEX Secretariat staff requires the *IECEX Secretary permission* option to be ticked when setting up persons who are IECEX Secretariat staff.

5 Main Menu, Level 1 - Administration

5.1 Creation of User and Access Rights for IECEX Secretariat staff as IECEX OCS Administrator – Process Steps

1. Select **Administration** in Main Menu on left of screen after logging as an existing member of IECEX Secretariat staff
2. Select **IECEX Users Access Rights** menu option
3. Click on **Create a new user** button
4. Fill in First Name, Last Name and personal Email address details
5. Select **Create** button
6. Fill in required details as appropriate for **Users Detail** and **Address** sections
7. Select IECEX Secretary Yes in **Permissions** section
8. Select **Save** button

5.2 Creation of User and Access Rights for IECEX ExCB staff – Process Steps


1. Select **Administration** in Main Menu on left of screen after logging as an existing member of IECEX Secretariat staff
2. Select **IECEX Users Access Rights** menu option
3. Click on **Create a new user** button
4. Fill in First Name, Last Name and personal Email address details
5. Select **Create** button
6. Fill in required details as appropriate for **Users Detail** and **Address** sections
7. **DO NOT** select IECEX Secretary Yes in **Permissions** section
8. Select **New permission** button
9. Select ExCB from pull down list
10. Assign users rights as either OCS IECEX CB Admin OR OCS IECEX CB Basic
11. Select **Save** button

12. Check that new user appears in the list of Permissions and that access level is correct – if not, select Trash can icon to delete and then start again at Step 8 above to add correct user details

6 IECEX ExCB & ExTL Details

6.1 Creation of new ExCB or ExTL - Process Steps

6.1.1 Basic Details

1. Select **ExCB/ExTL** in Main Menu on left of screen after logging as an existing member of IECEX Secretariat staff
2. Select **New ExCB** button in upper right of ExCB/ExTL Profiles page
3. Fill in Name, Short Name (that appears on IECEX reports and Certificates as ExCB's identifier of three or four letters) and me and personal Email address details
4. Select **Save & Close** button
5. Add other details by first finding "new ExCB" in the list on the ExCB/ExTL Profiles page (noting that clicking on the Code column title provides a sort facility to list all ExCBs and ExTLs by Short Name in either ascending or descending alphabetical order to assist in locating)
6. Select the  icon (that indicates ability to edit content) beside the Short Name for new ExCB

6.1.2 Address Details

1. Select **Addresses (#)** tab in the **Details** section
2. Select IECEX Scheme(s) in which the new body will participate from tabs in grey menu bar in the **Details** section
3. Select **Add or update details** button
4. Fill in required details as appropriate for **Organisation info Detail** section and select if new body is an ExCB or an ExTL (if the IECEX Scheme in which the body participates has ExTLs). If **Set as Default** **Yes** is selected the address will automatically appear on new drafts of **Certificates**. If other details are added at a later date (eg. different address or organisation name) the correct address will need to be selected to appear as the **Default** (other addresses will then appear in the **Default for certificate creation** section with Address type code column entry of "MAIN-IECEX" and have Status column show ticked box. The previous details version will now appear in the **Disable for certificate creation** section with Address type code column entry of "OLD-IECEX" and have Status column show an unticked box.

6.1.3 Scope of Capability Details

1. Select **Scope (#)** tab in the **Details** section
2. Select IECEX Scheme(s) in which the new body will participate from tabs in grey menu bar in the **Details** section
3. Select **Add Existing Scope** button
4. Select **Standards / Types of Service / Competence Units** (as appropriate to the IECEX Scheme in which the new body will participate)
5. Select **Update & Close** button
6. Note that the **Scopes** list for the selected Scheme will be updated and that options to later remove **Standards / Types of Service / Competence Units** exist in the **Action** column (*On* = included in scope, *Off* = not included in scope when ExCB accesses pull down list of **Standards / Types of Service / Competence Units** when creating a draft Certificate)

6.1.4 Signature Details

1. Select **Signatures (#)** tab in the **Details** section if you need to add names etcetra for persons at the ExCB that will appear in a pull down list of people that can be selected to appear on the certificate as the issuing signatory
2. Select IECEX Scheme(s) in which the new body will participate from tabs in grey menu bar in the **Details** section
3. Select **Create new Signature** button

4. Fill in required details
5. Select **Save & Close** button
6. Note that the Signatures list for the selected Scheme will be updated and that options exist to later remove a person from the pull down list of signatures presented when creating a draft certificate (*On* = appears in pull down list, *Off* = does not appear in the pull down list)

6.1.5 Contacts Details

1. Select **Contacts (#)** tab in the **Details** section if you need to add names and email addresses for contact persons at the ExCB
2. Select IECEX Scheme(s) in which the new body will participate from tabs in grey menu bar in the **Details** section
3. Select **Create New Contact** button
4. Fill in required details
5. Select **Save & Close** button
6. Note that the Contacts list for the selected Scheme will be updated and that options exist to later remove a person from the pull down list presented when creating a draft certificate (*On* = appears in pull down list, *Off* = does not appear in the pull down list)

6.1.6 Logos Details

7. Select **Logos (#)** tab in the **Details** section if you need to add names and email addresses for contact persons at the ExCB
8. There is no need to select IECEX Scheme(s) in which the new body will participate because it is presumed that the same logo applies irrespective of the Scheme(s)
9. Select **Add a new logo** button
10. Use the **Choose File** button to locate and select a logo file (e.g. as a .jpg or .png file) from its saved location
11. Use **Upload** to bring it into the IECEX OCS
12. Select **Save & Close** or **Apply Changes** button
13. Note that the Logos list will be updated and that options exist to later remove a logo from from the list of logos that are presented to a user when creating a draft certificate (*On* = appears in list, *Off* = does not appear in the list)

7 Access for users already in IEC Expert Management System (EMS)

Access to OCS is not automatically granted to experts registered in "EMS". For either an existing expert or a new user/expert, action is required by the "IECEX Secretariat" to provide access to OCS (or to any other existing or future IECEX application).

When a user already exists in EMS and you try to create his account in OCS BackOffice:

- You have the message: "Such user already exists" and his account appears in the "Existing Users" list above.
- In this case, open the account detail by clicking on the blue pencil and then you can give him a role in OCS
 - Click on the "blue pencil" to open his account and give him access to OCS IECEX.

The IECEX Secretariat can assign any of the following access rights

- OCS IECEX Secretariat,
- OCS IECEX *ExCBAdmin*
- OCS IECEX *ExCBBasic*

to a user that has an IECEX OCS account.

ExCBAdmin level user are only able to assign *ExCBBasic* level access rights to users HOWEVER it is recommended that the IECEX Secretariat be contacted for assistance in assigning access rights to new users

As soon as an EMS expert receives a role in OCS (Secretariat, CB Admin or CB Basic), they appear in the "IECEX Users Access Rights" list. EMS experts can log in OCS with their EMS login or EMS Email and their password.

When a new account is created the new user will receive an email from EMS System to follow the procedure to active their account and set their password.

NOTE that the IECEX Secretariat and *ExCBAdmin* do not have access to EMS details for individuals and cannot change these. Any changes need to be done in consultation with the user's IEC National Committee

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