Credential Engine Publisher Guide – Entering Organization Data

After your organization has been approved in the Credential Engine Accounts System, you will then enter the remaining data for your organization. The below instructions are for the manual entry for the minimum data required to publish to the registry as well as additional data recommended in the Organization Benchmark Data Models. For further instructions or questions, please contact Scarlett Jeckel sjjeckel@credentialengine.org.

Entering Organization Data

1. Once your organization has been approved to begin publishing, you will access the Credential Engine Publisher here: https://credentialengine.org/publisher. You will log in using the same login credentials you created in the Accounts System.

2. From the Publisher search, you will find your organization. Select ‘Edit’ on the right-hand side of your organization name. This will direct you to the manual editor for your organization.

3. Select the ‘Organization’ tab to expand the organization properties. Everything you entered when creating the organization in the account system will be pre-populated. The last remaining requirement is a description of your organization.
**Entering Organization Benchmark Data**

Credential Engine also recommends that you add information in the following fields.

1. The ‘Agent Purpose’ can be found under the Organization tab in the Credential Publisher. Here you will enter a direct link to the website where the organization’s mission or purpose is stated and its description.

   ![Agent Purpose](http://...)

   *A resource that describes the agent’s primary purpose.*

   ![Agent Purpose Description](...)

   *A description of the primary purpose of the agent being referenced.*

2. Next you will enter an ‘Organization Image,’ usually your organization’s logo. To enter your ‘Organization Image,’ you will enter a direct link to that image.

   ![Organization Image](https://cdn.ymaws.com/www.gafm.com/graphics/logo.png)

   *A publicly-accessible URL of the image or icon that represents the organization.*

3. Next, add a ‘Founding Date.’ When entering the ‘Founding Date’ you can enter just the year, the year and month, or the full date.

   ![Founding Date](...)  
   *Date or partial date when organization was founded. The year (yyyy) or year and month (yyyy-mm or mm, yyyy, 1926) or full date (yyyy-mm-dd, or January 17, 1923) the organization was founded.*

4. Next you will select the relevant ‘Organization Service Types.’ These are the ways your organization interacts with credentials; for example, if you are a certification body you would likely select ‘offer,’ ‘renew,’ and ‘revoke.’

   ![Organization Service Types](...)

   *The types of services offered by the organization.*

   ![Checkboxes](...)

   *Regulate Service, Approve Service, Offer Service, Recognize Service, Renew Credential Service, Revoke Credential Service*

5. Including ‘Keywords’ will make your organization easier to search for. To add ‘Keywords’ select the ‘Add a Keyword’ button and repeat for all applicable ‘Keywords.’

   ![Keywords](...)  
   *Enter keywords that describe this organization.*

   ![Add a Keyword](...)
6. Lastly in the ‘Organization’ tab in the Publisher you will enter the organization ‘Jurisdiction.’ This property is where you will enter applicable information about geographic areas and their exceptions. To begin you will select the ‘Add new Jurisdiction’ button located under ‘Jurisdiction.’

   a. Once the ‘Add new Jurisdiction’ button, a new pop up window will appear. In this window you will enter the applicable information about the organization jurisdiction. From here you provide a summarization of the jurisdiction, if it is global, select a primary region, and any region exceptions. After entering all applicable data, you will select ‘Save and Close.’

7. Next in the ‘Location and Contact Information’ tab located below the ‘Organization’ tab, you can enter the ‘Organization Social Media Pages.’ To enter your organization social media, select the ‘Add a Social Media Page’ button and repeat for all applicable social media.
8. We also recommend adding information about how your organization develops and maintains your credentials. To do this, go to the 'Organization Processes' tab located towards the bottom of the Credential Publisher. Selecting this tab will expand to display all processes that can be entered.

   **Organization Processes**

   **Maintenance Processes**

   Describe the processes used to maintain the credential.

   - Add new Maintenance Process

   **Administration Processes**

   Describe the processes used to administer the credential.

   - Add new Administration Process

   **Development Processes**

   Describe the processes used to develop the credential.

   - Add new Development Process

   a. First to enter the 'Maintenance Processes' you will select the 'Add new Maintenance Process' button located on the right-hand side. This will prompt a new pop up window to begin entering the 'Maintenance Processes' information. From this profile you will enter the required description summarizing this information. Additionally, you can enter a relevant webpage, External Input Type, Process frequency, Process Method, Process Standards, Effective Date, and more. Once you have entered all applicable data select the 'Save and Close' button located at the bottom of the profile.
b. To enter the ‘Development Processes’ data select the ‘Add new Development Process’ button located on the right-hand side. This will prompt a new pop up window to begin entering the ‘Development Processes’ information. Like the ‘Maintenance Processes,’ you will enter the required description summarizing the processes to develop the organization’s credentials. Additionally, you can enter a subject webpage, External Input Type, Process frequency, Process Method, Process Standards, Effective Date, and more. Once you have entered all applicable data select the ‘Save and Close’ button located at the bottom of the profile.

9. Lastly, we recommend including information about quality assurance, such as accreditation, recognition, or approval. To enter an ‘External Third Party Quality Assurance’ select the ‘Add new Role’ button located on the right-hand side.
a. This will prompt a new Quality Assurance profile window to pop up. From there you will select the type(s) of relationship the Quality Assurance organization is performing. After selecting the type(s) of relationship, you will use the search to select an organization that perform the role(s). If the Quality Assurance organization is not found in the search, you will add the organization as a reference. To add an organization reference, select the ‘Add Organization Reference’ located on the right-hand side of the organization search. To add an organization reference you will just simply enter a Name, Description, and Subject Webpage. Once the quality assurance roles and organization have been entered select the ‘Save and Close’ button located at the bottom of the screen. If your organization has multiple ‘External Third Party Quality Assurance’ select the ‘Save and Add Another’ located at the bottom of the screen to create additional profiles.

After entering your organization data, the next step is to approve your data to be published. For additional information on approving your organization data, please see our Approving Organization and Credential Data instructions.

Ready to Get Started?

Joining the Credential Registry is quick and easy:

1. Go to www.credentialengine.org
2. Select “Publish to the Credential Registry”
3. Click “Create an Account” to get set up and verified
4. Choose your preferred method of sharing your data (detailed resources provided)
5. Start publishing!