



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 sjeckel@credentialengine.org.

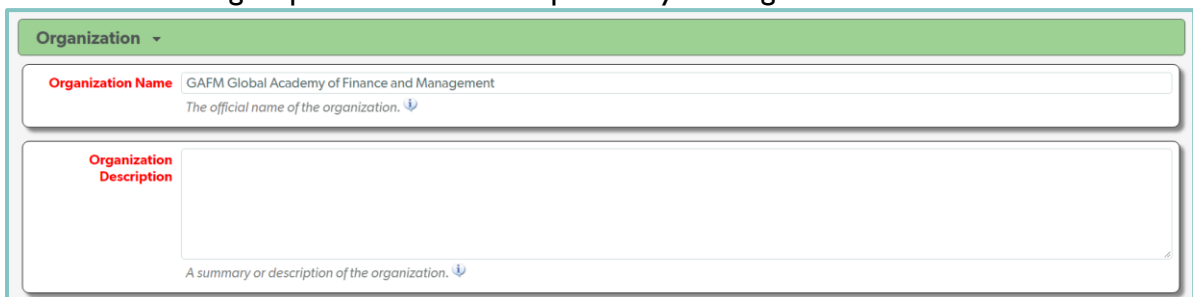
Entering Organization Data

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.



The screenshot shows the organization profile for "GAFM Global Academy of Finance and Management". It includes a placeholder for a profile picture, the organization's name, a unique ID "ce-58f701ba-d604-4a63-a0fb-e77eedd11bdf", and three action buttons: "Edit", "Summary", and "Review". Below these is a location pin icon. At the bottom, a status bar indicates "Status: Last Updated: 2019-02-27 09:55, Not Approved, Not Published" and shows "6 Organization Types" and "1 Sector".

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.



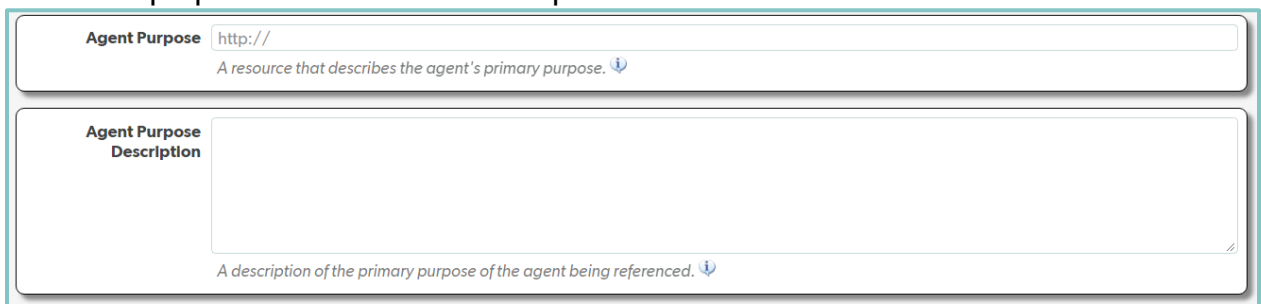
The screenshot shows the "Organization" tab expanded. It contains two main input fields: "Organization Name" with the pre-populated value "GAFM Global Academy of Finance and Management" and a subtext "The official name of the organization.", and "Organization Description" with a large text area and a subtext "A summary or description of the 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.



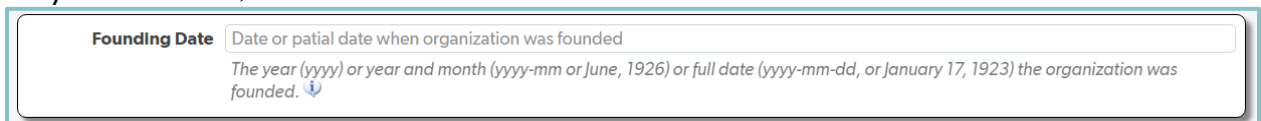
The screenshot shows two input fields for 'Agent Purpose'. The first field is labeled 'Agent Purpose' and contains the text 'http://'. Below it is a hint: 'A resource that describes the agent's primary purpose.' The second field is labeled 'Agent Purpose Description' and is empty. Below it is a hint: '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.



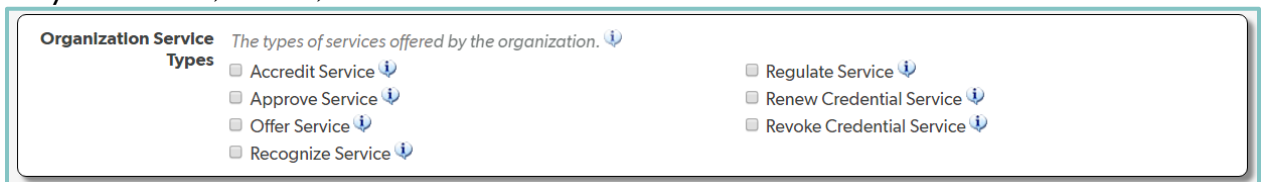
The screenshot shows a single input field labeled 'Organization Image' containing the URL 'https://cdn.ymaws.com/www.gafr.com/graphics/logo.png'. Below the field is a hint: 'A publicly-accessible URL of the image or icon that represents the organization.'

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.



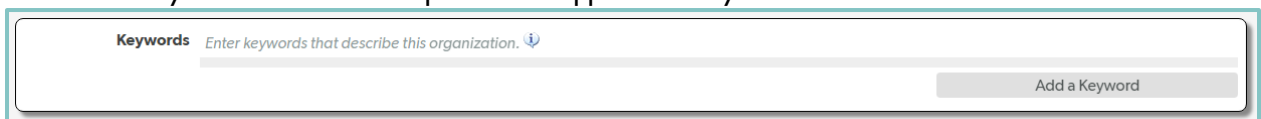
The screenshot shows a single input field labeled 'Founding Date' containing the text 'Date or partial date when organization was founded'. Below the field is a hint: 'The year (yyyy) or year and month (yyyy-mm or June, 1926) or full date (yyyy-mm-dd, or January 17, 1923) the organization was founded.'

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.'



The screenshot shows a form labeled 'Organization Service Types' with the hint 'The types of services offered by the organization.' It contains two columns of checkboxes. The first column includes 'Accredit Service', 'Approve Service', 'Offer Service', and 'Recognize Service'. The second column includes 'Regulate Service', 'Renew Credential Service', and 'Revoke Credential Service'. Each checkbox has a small information icon to its right.

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.'



The screenshot shows a form labeled 'Keywords' with the hint 'Enter keywords that describe this organization.' It features a large text input area and a button labeled 'Add a Keyword' on the right side.

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.'

Jurisdiction

Geo-political information about applicable geographic areas and their exceptions.

[Add new 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.'

Jurisdiction

Description

Summarize this jurisdiction and provide any additional necessary information.

Is Global

☒ No Data
☐ This jurisdiction is global.
☐ This jurisdiction is not global.

Indicates whether or not the jurisdiction is global/worldwide.

Main Region *Describe the primary region for this item.*

Search

Search for all location types

Search...

Search
Reset

Saved Regions

No saved items

Region Exceptions *If the primary region contains any sub-regions where the item does not apply, select them here.*

Search

Search for all location types

Search...

Search
Reset

Saved Exceptions

No saved items

Save and Continue
Save and Close
Save and Add Another

Cancel
Delete

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.

Location and Contact Information

Availability Listing http://

Provide a URL to a page that lists physical and/or online locations where this organization is located.

Contact Points

A means of contacting a resource or its representative(s).

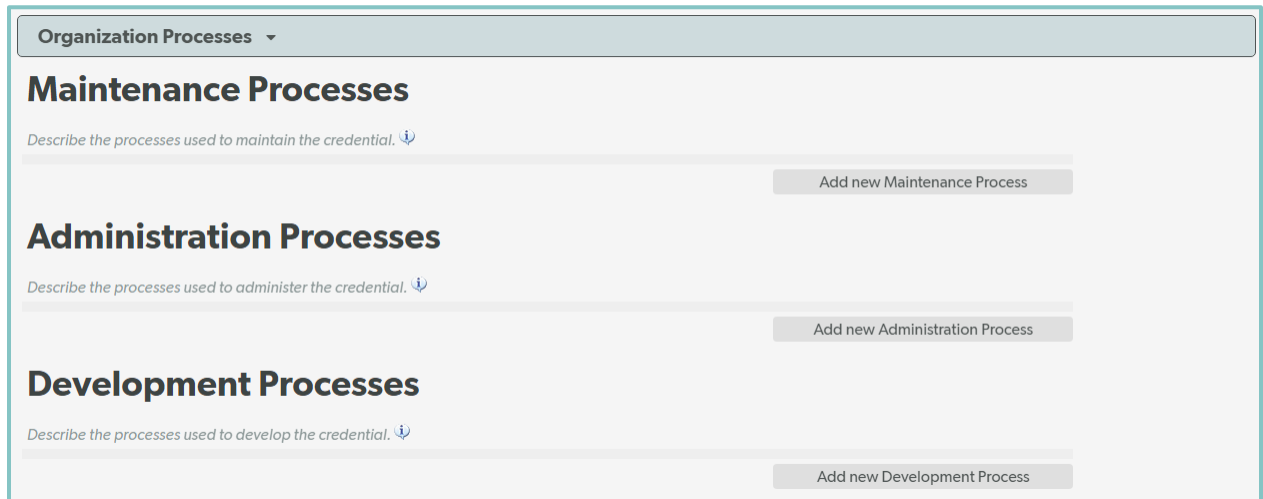
[Add new Contact Point](#)

Organization Social Media Pages *Social Media Pages that represent the organization directly.*

[Add a Social Media Page](#)

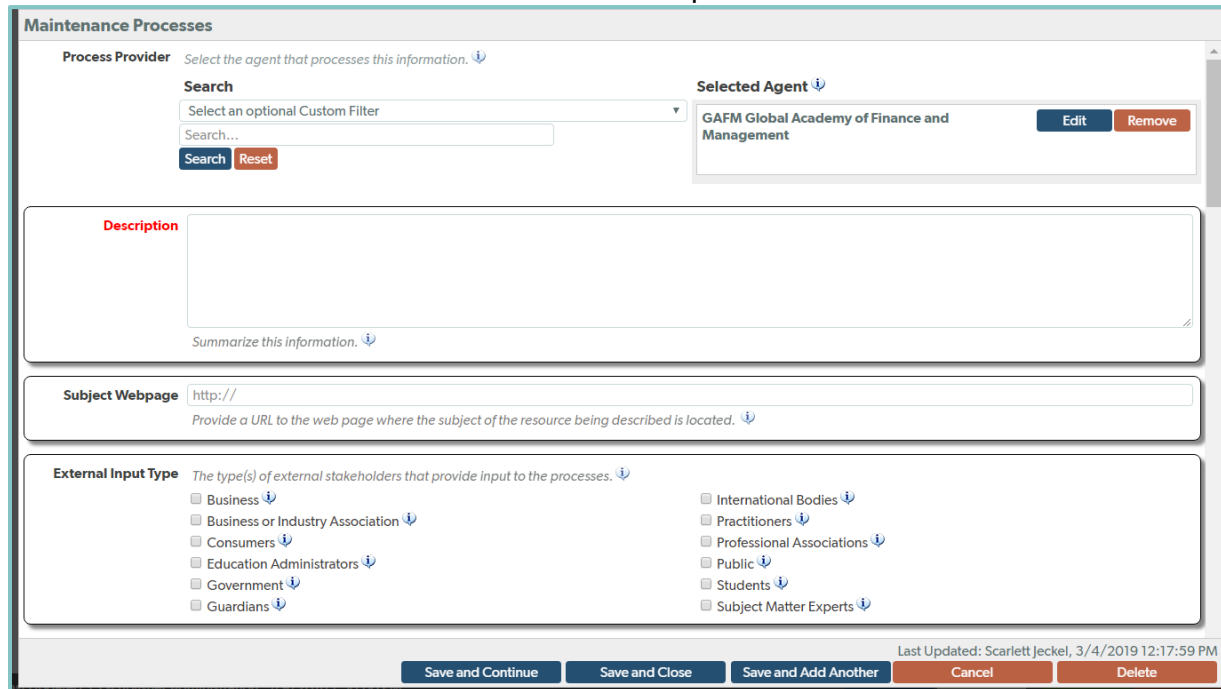


8. We also recommend adding information about how your organizations develops and maintains your credentials. To do this, go to the 'Organization Processes' tab located towards the bottom of the Credential Publisher. Selecting this tab will expand to display all processes that can be entered.



The screenshot shows the 'Organization Processes' tab with a dropdown arrow. Below it are three sections: 'Maintenance Processes', 'Administration Processes', and 'Development Processes'. Each section has a description prompt (e.g., 'Describe the processes used to maintain the credential.') and an 'Add new' button (e.g., 'Add new Maintenance 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.



The screenshot shows the 'Maintenance Processes' profile form. It includes a 'Process Provider' section with a search filter and a 'Selected Agent' section showing 'GAFM Global Academy of Finance and Management'. There is a large 'Description' text area with a prompt 'Summarize this information.' Below this is a 'Subject Webpage' field with a URL 'http://'. The 'External Input Type' section lists various stakeholder categories like Business, Government, and International Bodies. At the bottom, there are buttons for 'Save and Continue', 'Save and Close', 'Save and Add Another', 'Cancel', and 'Delete'. A timestamp 'Last Updated: Scarlett Jeckel, 3/4/2019 12:17:59 PM' is visible.



- 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.

Development Processes

Process Provider Select the agent that processes this information.

Search

Select an optional Custom Filter

Search...

Search **Reset**

Selected Agent

GAFM Global Academy of Finance and Management

Edit **Remove**

Description

Summarize this information.

Subject Webpage Provide a URL to the web page where the subject of the resource being described is located.

http://

External Input Type The type(s) of external stakeholders that provide input to the processes.

☐ Business
 ☐ Business or Industry Association
 ☐ Consumers
 ☐ Education Administrators
 ☐ Government
 ☐ Guardians

☐ International Bodies
 ☐ Practitioners
 ☐ Professional Associations
 ☐ Public
 ☐ Students
 ☐ Subject Matter Experts

Last Updated: Scarlett Jeckel, 3/4/2019 12:26:33 PM

Save and Continue **Save and Close** **Save and Add Another** **Cancel** **Delete**

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.

External Third Party Quality Assurance Received

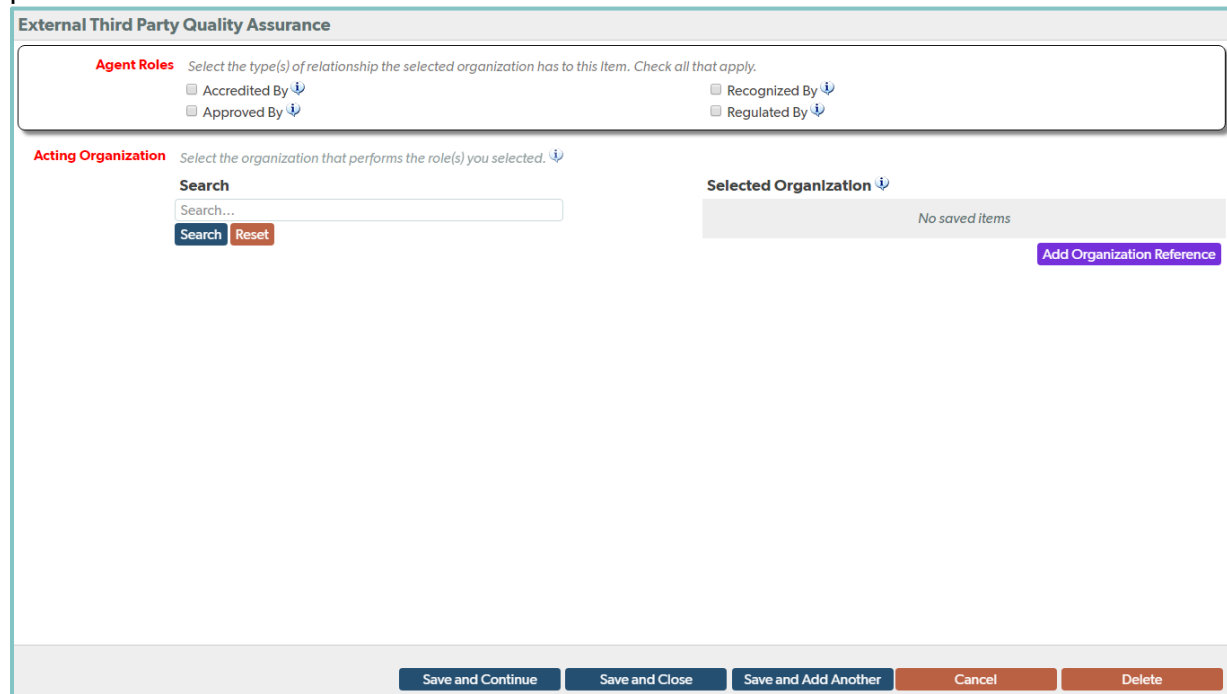
External Third Party Quality Assurance

Describe the relationships this organization has to one or more organizations where this organization is the recipient of the role.

Add new Role



- 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!