

	IT- SGSonSite	Type:	Best Practices
		Reference:	CC -11
eCertificate Best Practices for SGSonSite Ver8		Issue n°:	4.0
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1. INTRODUCTION

Welcome!

As you are reading this document means that you are interested on eCertificate creation and you came to the right page.

This document aims to provide guidelines to ensure that eFindings documents will create less formatting and PDF conversion problems when creating eCertificates on SGSonSITE and standardize the appearance of eCertificates.

2. DEFINITIONS

eFindings – Microsoft Word (.doc or .docx) document created by SGS staff to upload to SGSonSITE to create an eCertificate. The eFindings document contains only the body text that should appear in the eCertificate. The SGSonSITE application will merge this eFindings document with a background template and add the certificate number, office address, SGS stamp, signature, etc.

Draft / Final eCertificate templates – Open Office (.odt) documents in the system that will be merged to the eFindings document in order for the certificates to have an eCertificate watermark and contain SGS affiliate address and legal matters.

Draft eCertificate – Adobe PDF document that can be sent to a reviewer or to the client to review contents of the certificate. The Draft eCertificate contains a “Draft” watermark displayed in the background and does not contain the eCertificate watermark, SGS stamp and authorized signature.

Final eCertificate – Adobe PDF document containing the eCertificate watermark, SGS stamp and signature. Final eCertificates can be sent to clients by email through the SGSonSITE website.

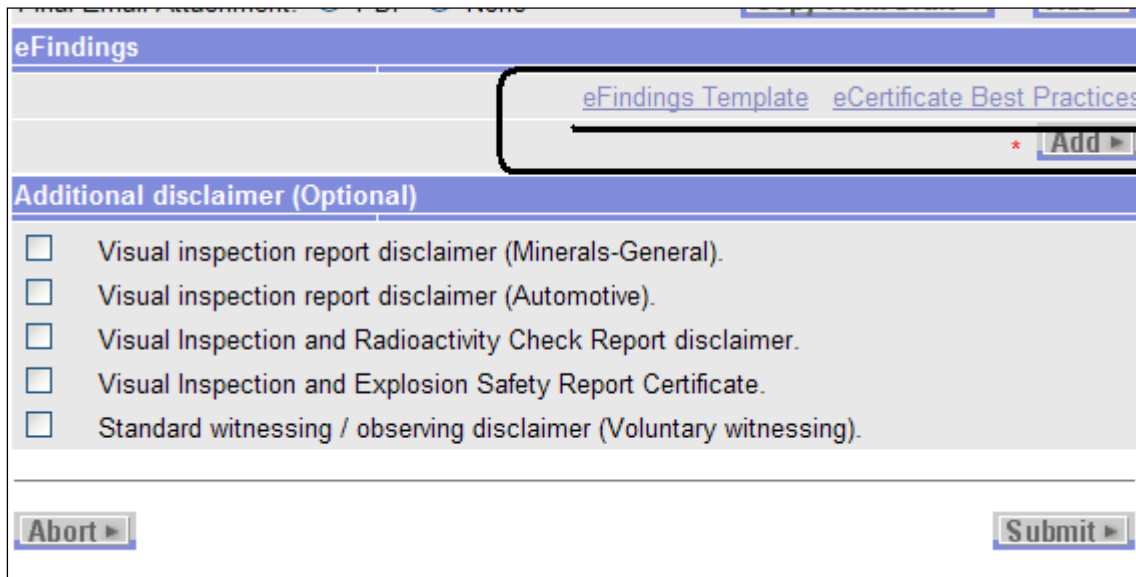
3. GUIDELINES

Note: The MSOffice used for the screenshots is version 2007.

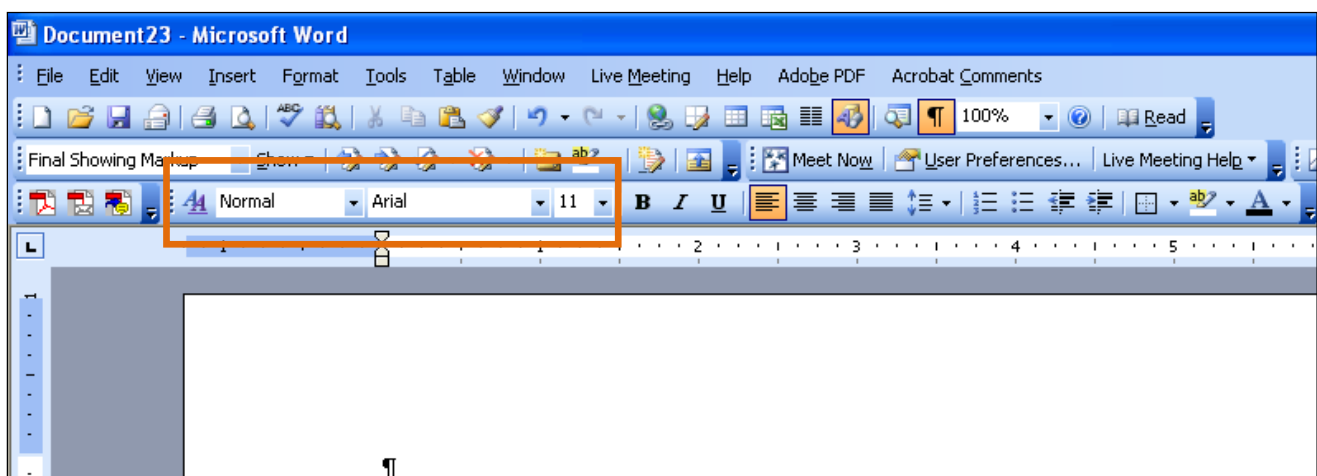
3.1 What should I do?

- Download the sample eFindings template created as a guide at the **Create an eCertificate** page. See screenshot below.

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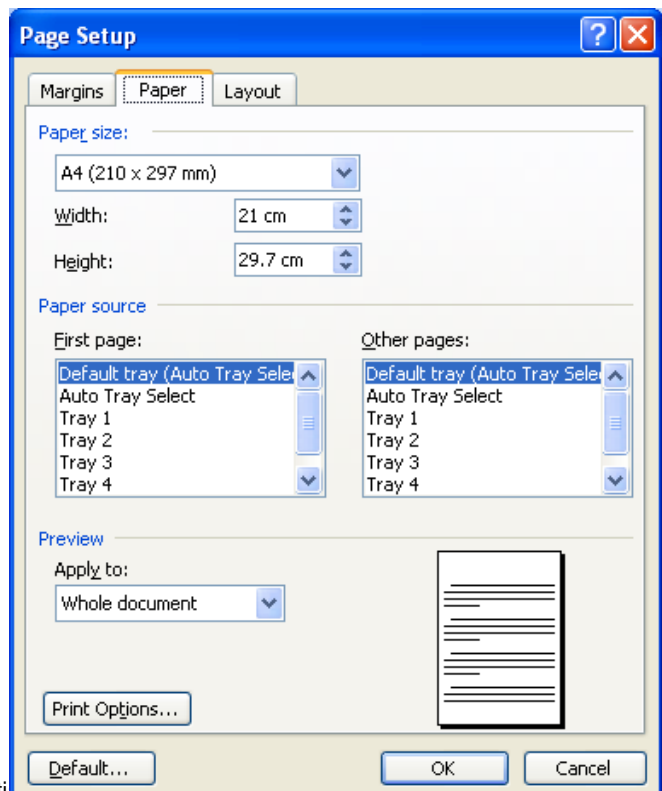
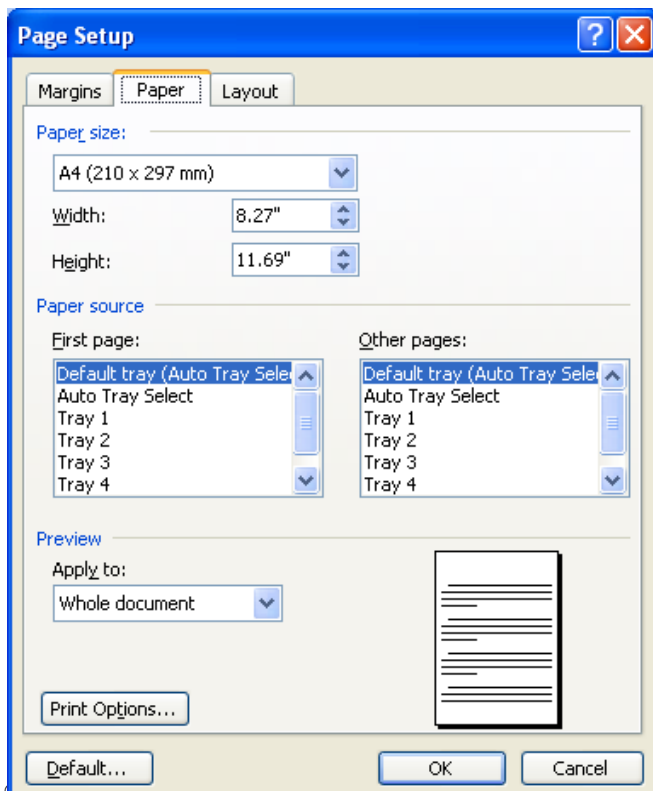
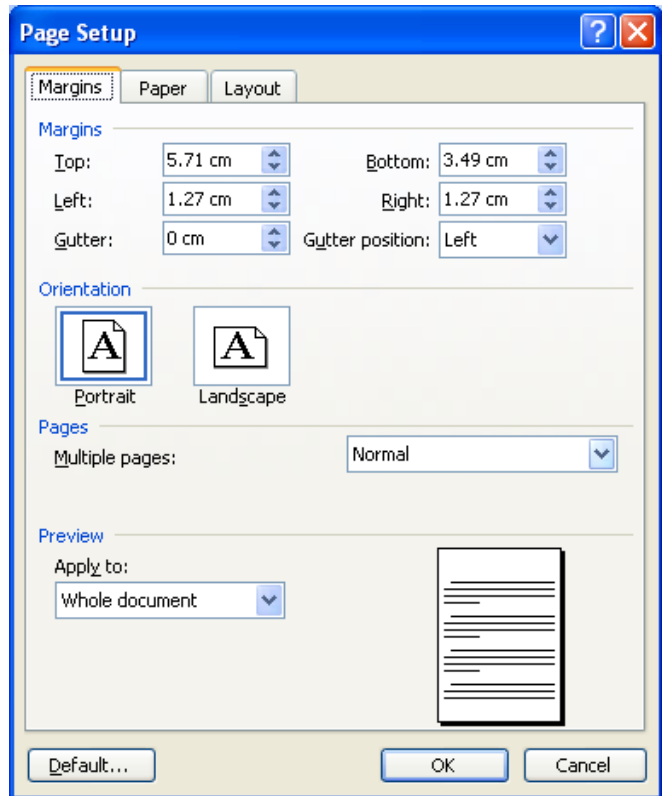
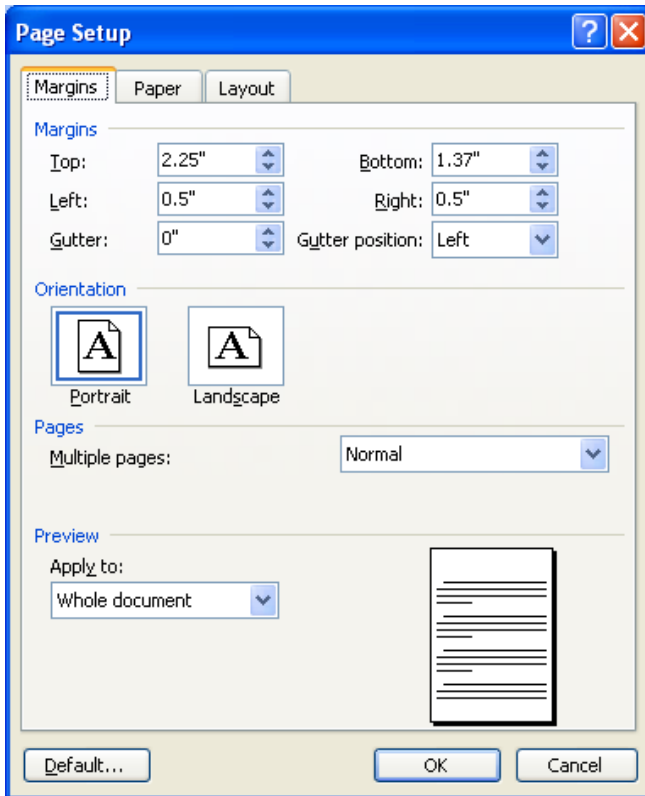


- For your benefit, we also uploaded a copy of the eCertificate Best Practices Guide on the **Create an eCertificate** page.
- To minimize the download time for your customers, please ensure the size of the efindings is **less than 1 megabyte**
- **Font** - use **Arial with font size '11'**. This will ensure consistency of the document content with the merged SGSonSITE templates. As much as possible, use **black** font.
- **Alignment** – If the first line of the document is middle or right aligned, add a blank space before the row else the alignment will not be recognized. If the last line of the document is middle or right aligned, add a blank space after the last line so the alignment will be recognized.
- **Style** - all documents must use the Microsoft Word **'Normal'** style when creating the Word file (ie. do not use Heading 1, Heading 2, etc. - see screenshot below).

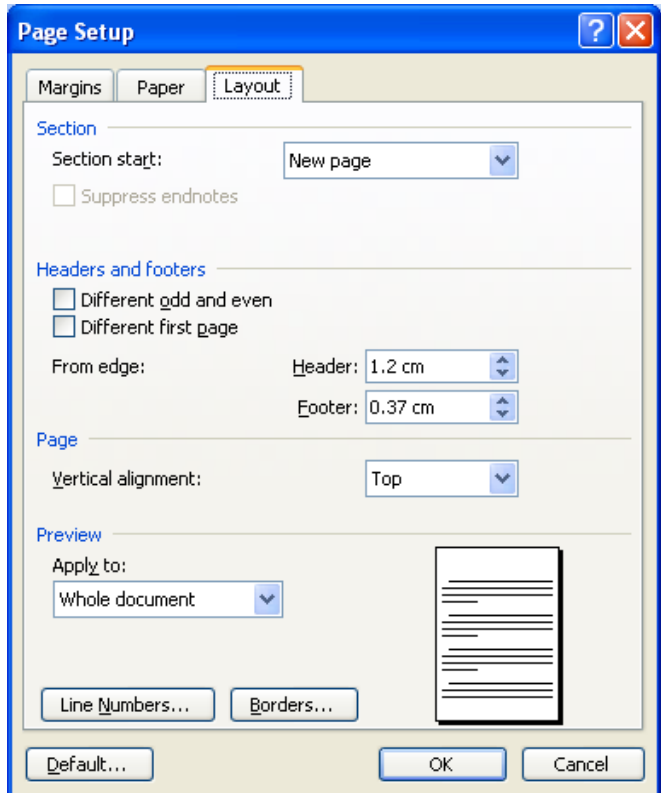
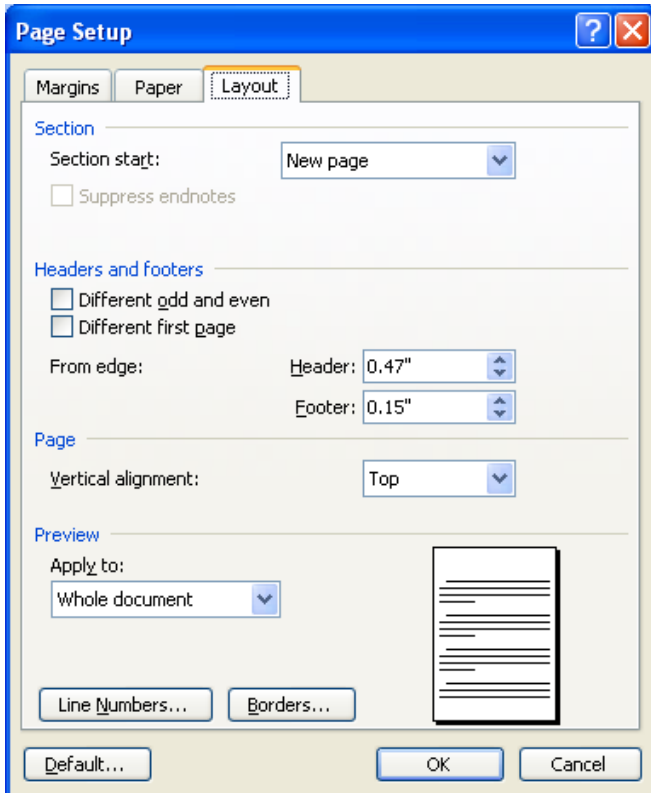


- **Page setup and margins** - Set the margins in your eFindings document to be exactly the same as the margins in the eCertificate templates – this will allow you to see where the page breaks are most likely to occur (at least within 1 line).

To do this, go to the menu File -> Page setup and set your document as shown in the screenshots below. The screenshot on the left shows the values in inches and the screenshot on the right shows the values in centimeters.



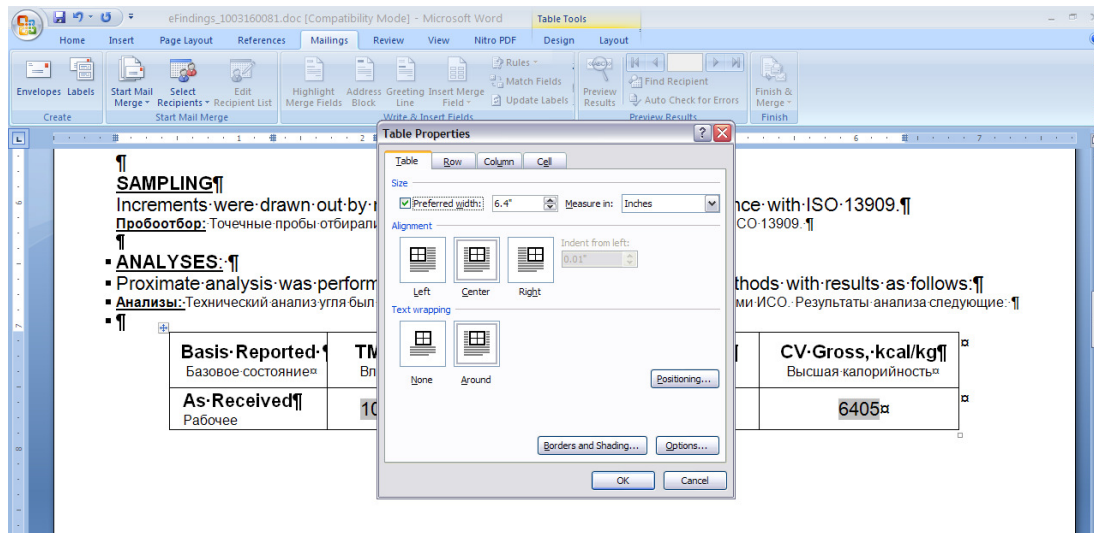
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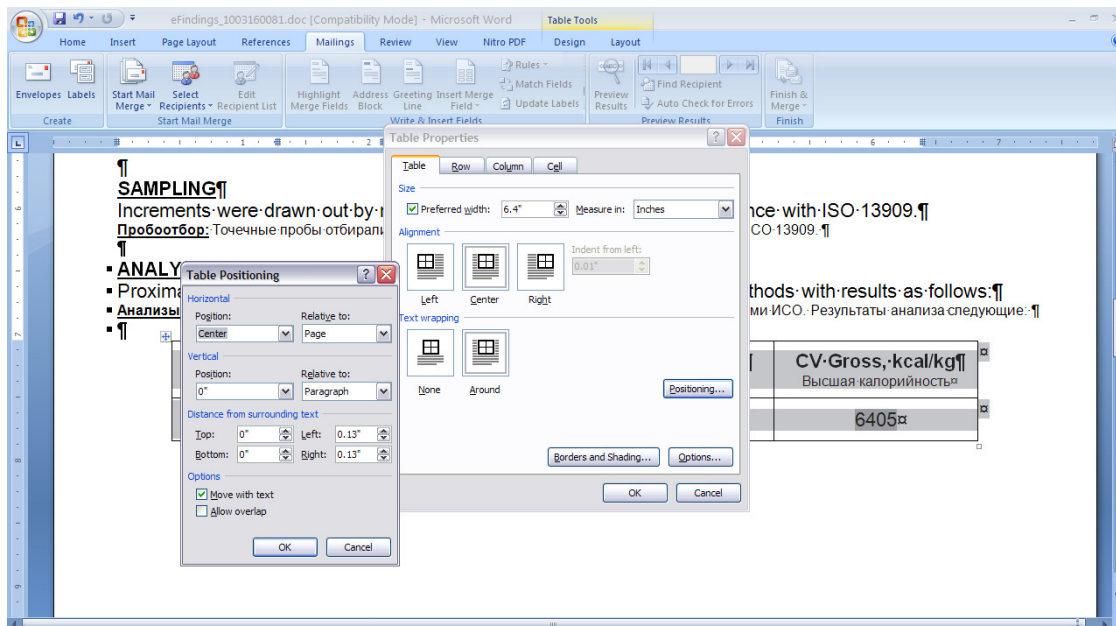
- **SGS Stamp Position** - to further control the location of the stamp and signature and to ensure that they are not located alone on the last page of the eCertificate, you can also use the following procedure:
 1. Open Microsoft Word and select the last line of your eFindings document that must be displayed together with the stamp and signature.
NB: *The last blank line at the bottom of the eFindings document must be selected.*
 2. Select the **Paragraph** menu in Microsoft Word, go to the **Line and Page Breaks** tab and select the **Keep with Next** checkbox.

Refer to the screen shot below for an example on how to do this.

- **Tables** – Sometimes, tables conflict with the position of the signature. When this happens, follow the procedure below:
 1. Select **only** the table nearest the signature (usually this is the last table found on the document) and click on “Properties”.
 2. Select the “Around” option under text wrapping.



3. Click on the “Positioning” button and follow the settings below.

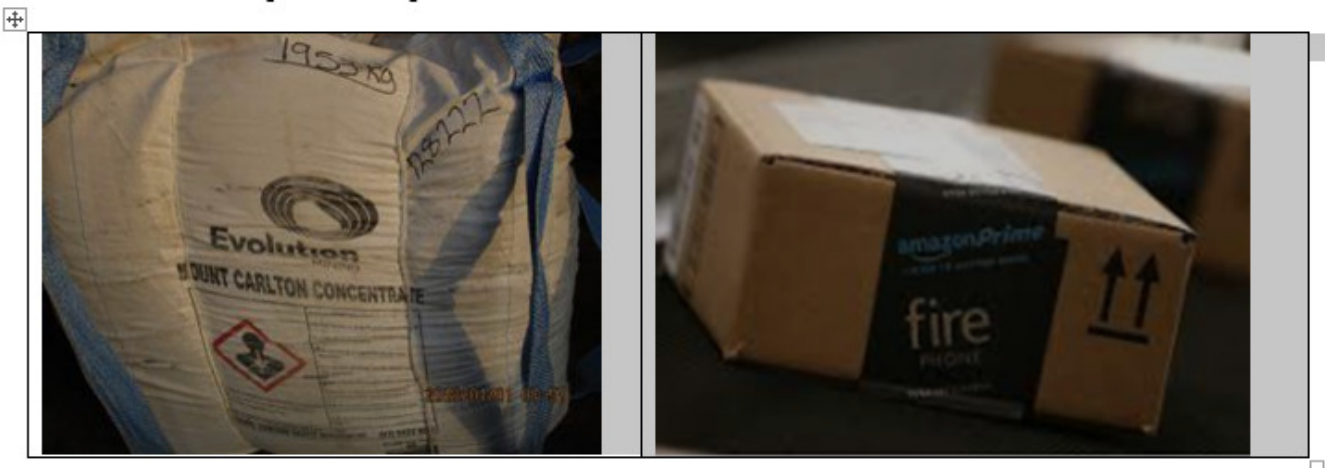


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3.2 Images

Images – to properly format the images in your efindings, create a table first and then insert the photos inside the table.

For Multiple photos, each photos should be inserted into a separate cell.

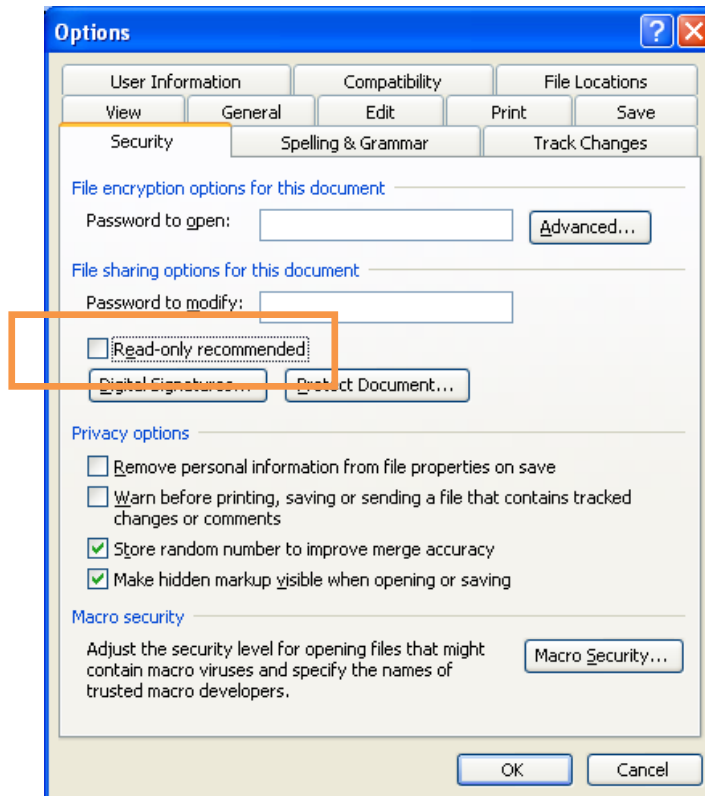


3.3 What not to do!

- **Page and Section Breaks** – do not use “page break” or "section break" when creating your word document as this causes problems with the merging of the background template. Use the “ENTER” key until you get to the next page.
- **Links and Macros** - do not insert links to other documents or macros as this causes problems with the PDF conversion process.
- **Paragraph** – do not use paragraph borders and shading since it will not be recognized and may conflict with the signature position when converted to PDF.
- **Tables**
 - When using tables, always use solid lines or no lines for the borders. Go to Format-> Borders and Shading -> Style and select the solid line. (Do not use dotted lines or the “red marching ants” style as this frequently causes the conversion to fail.)
 - Never begin a certificate with a table as this causes wrong pagination.
 - Do not create a certificate with all contents inside the table.
- **Table Background** – when using tables do not set the table background to "white" as this will hide the eCertificate background in the final eCertificate. Instead, use "No Fill". To check this, do the following:
 1. In the eFindings Word document, position your cursor on the table that you want to check.
 2. Go to the "Table" menu and select "Table Properties".
 3. Click on "Borders and Shading" and go to the "Shading" tab.
 4. Select "No Fill" and press "OK".
- **Headers & Footers** - please do not use headers and/or footers when creating your eFindings.

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- **Empty lines** - Avoid adding **more than 1 empty space** at the end of a document as this may generate an additional page at the end of the eCertificate.
- **Security** - Do not enable the “Read-only recommended” flag in MS Word. This will cause the PDF conversion to fail. To check this, please go to Tools -> Options -> Security and make sure that the “Read-only recommended” check box is not selected.



4. WHO TO CONTACT FOR ASSISTANCE

The SGS CustomerCare team is available 24 hours per day (GMT +8) 6days per week to assist you with eCertificate formatting and processing problems.

Email: customercare@sgs.com
 Telephone: +63 2 755 7417

You may also contact Nella Bacsal:

Email: marinella.bacsal@sgs.com
 Telephone: +63 2 755 7428
 Cellphone: +63 9178586211

You may visit the SGSonSite Sharepoint for more details on ecertificates, ereports and its function at <http://chsites01.sgs.net/sites/GLOBAL-SGSonSITE/default.aspx>. Interested for online training? Send email to customercare@sgs.com or call the numbers indicated above.

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*All requests for user account creations-- change or update in details and deletions should access --
<http://chsites01.sgs.net/sites/GLOBAL-SGSonSITE/Lists/SGSonSite%20User%20Account%20Creation/BusinessLine.aspx>.*