



National Fenestration Rating Council Incorporated

CERTIFICATION AND INSPECTION AGENCY USER MANUAL_[E0A1]

NFRC Certified Products Database 2.0

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FOREWORD

This NFRC Certified Products Database IA User Manual provides guidelines and explains the procedure to NFRC Licensed Certification and Inspection Agencies for accepting, updating, reviewing and validating uploaded products using NFRC online Certified Products Database (CPD 2.0).

Questions on the use of this procedure should be addressed to:

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1. INTRODUCTION

The IA Certified Products Database User's Manual provides guidelines and explains the procedure to review and validate data uploaded by laboratories to the online NFRC Certified Products Database 2.0. It is intended to provide the Inspection Agency with information on how to review and accept uploaded simulation and test data, to coordinate simulation and test reports for validation, to finalize the validation at the comparison screen, and ability to generate a product line and provide Certification Authorization Report to manufacturers. This manual is an integral component of the *NFRC CAP* and *NFRC PCP*, and provides the IA user with direction on how to access and navigate the database with accuracy and consistency.

2. CERTIFICATION AND INSPECTION AGENCY RESPONSIBILITIES

Licensed NFRC Certification and Inspection Agencies (IAs) participating in the Certification Agency Program (CAP) are responsible for updating and monitoring information in the Certified Products Database that is specific to their manufacturer/client. These responsibilities include:

- Ensuring that the product information uploaded by the simulation and testing laboratory is accurate and complete.
- Reviewing the simulation and testing summary and accepting the data into the database.
- Reviewing the status of current product lines to ensure that the certification status of those product lines is accurately reflected in the system.
- Monitoring active product lines in the database to ensure that those product lines nearing expiration be recertified in a timely manner by notifying the manufacturer/client of the need to recertify their product.
- Deactivating product lines that have expired.
- Maintaining accurate and current product line data for each manufacturer/client within their certification program.

3. SUMMARY SPREADSHEETS

There are two summary spreadsheets: simulation and testing.

The simulation summary spreadsheet and testing summary spreadsheet for U-factor, Solar Heat Gain Coefficient, Visible Transmittance, and Condensation Resistance are designed to allow for an efficient transfer of testing data into the NFRC Online Certification Database.

The current summary spreadsheets and user manuals can be located on the technical documents web page on the NFRC website: <http://www.nfrc.org/CPDInfo.aspx>.

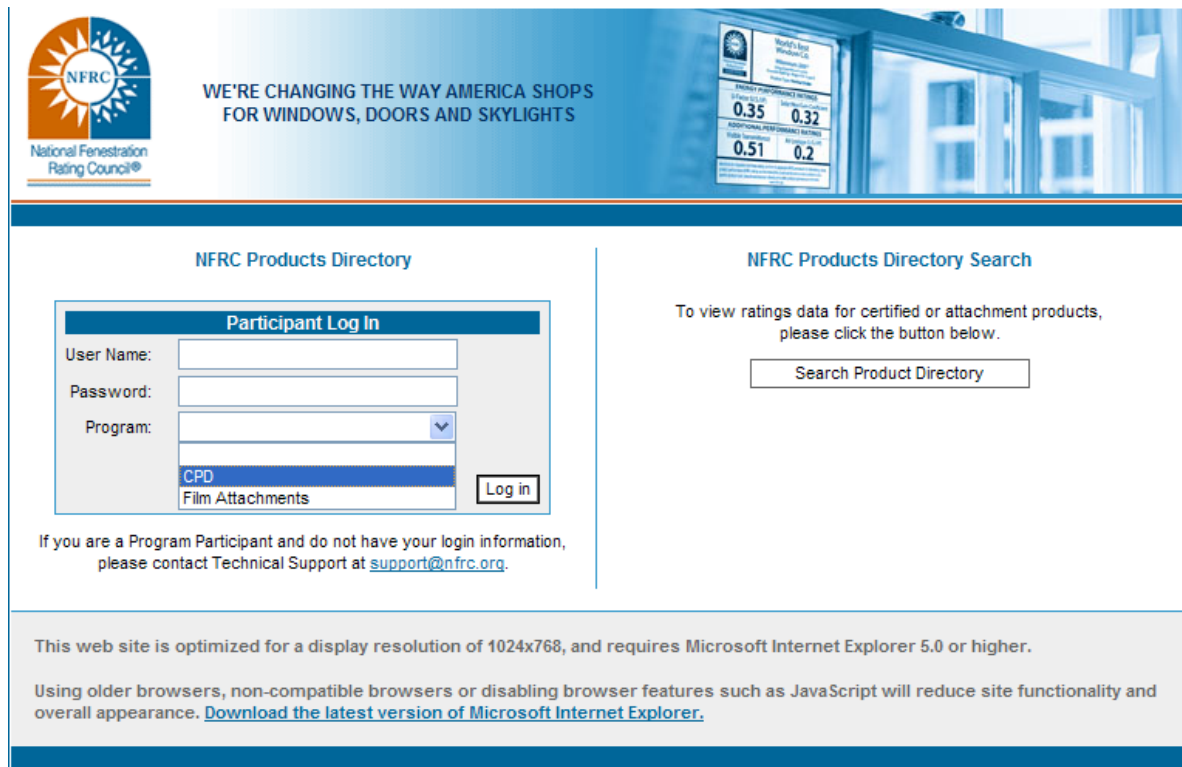
4. STARTING THE APPLICATION

For optimum performance, the application can be accessed using Internet Explorer 5.5 or higher. To access the application use the following link: <http://cpd.nfrc.org>

The Inspection Agency is taken to the login screen (Figure 4.1) and prompted to input a valid username and password. Usernames and passwords are supplied to the user by the NFRC.

User can at any time in the application log off, that is exit out of the CPD, by clicking on the log off hyperlink.

Figure 4.1: Starting the NFRC Certification Database – Login Screen



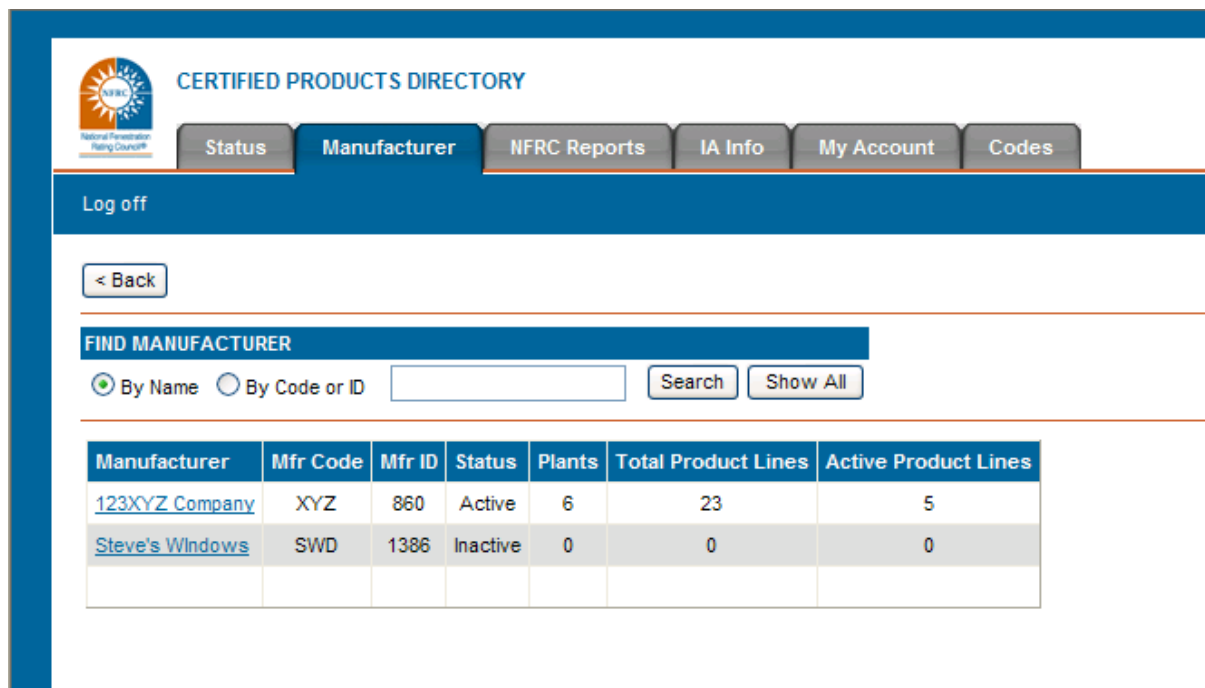
5. MANUFACTURER TAB – IA HOME PAGE

After logging in, the user is taken to the Manufacturer screen (IA Home Page; see Figure 5.1), which displays a list of all manufacturers associated with the IA. The listing displays the manufacturer Codes, ID, Status (Active or Inactive), # of Plants, total number of product lines, and the number of active product lines.

The IA will use this page to select a manufacturer in order to view many manufacturer details, such as product line listings and manufacturer details.

To select the desired manufacturer, click on the manufacturer hyperlink, which will result in the displaying of the manufacturer’s product line summary page.

Figure 5.1: Inspection Agency Home Page Screen



The screenshot displays the 'CERTIFIED PRODUCTS DIRECTORY' interface. At the top left is the NFRC logo (National Fenestration Rating Council). A navigation bar contains tabs for 'Status', 'Manufacturer' (which is selected), 'NFRC Reports', 'IA Info', 'My Account', and 'Codes'. Below the navigation bar is a 'Log off' button. A '< Back' button is also present. A search section titled 'FIND MANUFACTURER' includes radio buttons for 'By Name' (selected) and 'By Code or ID', a search input field, and 'Search' and 'Show All' buttons. Below the search section is a table with the following data:

Manufacturer	Mfr Code	Mfr ID	Status	Plants	Total Product Lines	Active Product Lines
123XYZ Company	XYZ	860	Active	6	23	5
Steve's Windows	SWD	1386	Inactive	0	0	0

5.1 Selecting a Manufacturer

The IA can search for a different manufacturer/client either by Name, a three-character manufacturer alpha code or manufacturer numeric ID, or by scrolling through the list of manufacturers displayed on the screen.

Figure 5.2: Inspection Agency Manufacturer Screen

FIND MANUFACTURER

By Name By Code or ID

Manufacturer	Mfr Code	Mfr ID	Status	Plants	Total Product Lines	Active Product Lines
123XYZ Company	XYZ	860	Active	6	23	5
Steve's Windows	SWD	1386	Inactive	0	0	0

5.1.1 Name Search

Search by manufacturer name, type “123XYZ” in the Manufacturer Name field and then press the Search Button. To return to the manufacturer tab, click on the “Back” Button or click the Manufacturer tab at the top of the screen.

Figure 5.3: Results of Name search

FIND MANUFACTURER

By Name By Code or ID

Manufacturer	Mfr Code	Mfr ID	Status	Plants	Total Product Lines	Active Product Lines
123XYZ Company	XYZ	860	Active	6	21	21

5.1.2 Code or ID Search

Search by three-character alpha code in the “Code” field, type in alpha code and then press the Search Button.

Figure 5.4: Results of Code or ID search:

FIND MANUFACTURER

By Name By Code or ID

Manufacturer	Mfr Code	Mfr ID	Status	Plants	Total Product Lines	Active Product Lines
123XYZ Company	XYZ	860	Active	6	23	5

Search by a one to three digit numeric ID in the “ID” field, type in ID number and then press the Search Button. **Note: If the numeric ID does not match exactly, a notification will occur; re-enter the correct ID and select search.**

Figure 5.5: Results of this search:

FIND MANUFACTURER

By Name
 By Code or ID

Manufacturer	Mfr Code	Mfr ID	Status	Plants	Total Product Lines	Active Product Lines
123XYZ Company	XYZ	860	Active	6	23	5

5.1.3 Scrolling Search

To select a manufacturer use the normal scrolling features, mouse or screen, to view the entire manufacturer list.

Figure 5.6: Results of this selecting the desired manufacturer:

CERTIFIED PRODUCTS DIRECTORY

Status
Manufacturer
NFRC Reports
IA Info
My Account
Codes

Log off
Welcome shanon-ia

Product Line Summary: 123XYZ Company
Check to create separate report for each product line:

Select Line Status: Active Only

Change status to:

CPD Number	Grouped With	Status Code	Series/Model Number	Operator Type	Initial Certification Date	Certification Date	Expiration Date	Change Line Status	Change Product Statuses	Car Reports
XYZ-T-75			NEW-08-06-29	VSDH	9/4/2008	9/4/2008	6/29/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XYZ-T-76			NEW-08-06-21-NEW	HSXX	9/6/2008	9/6/2008	1/1/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XYZ-T-77			Test #001a	VSDH	10/20/2008	10/20/2008	11/16/2011	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XYZ-T-78			NEW-08-06-29	VSDH	10/26/2008	10/26/2008	7/1/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XYZ-T-79			Simulation Upload - 001	VSDH	10/26/2008	10/26/2008	6/1/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. PRODUCT LINE SUMMARY PAGE

After selecting a manufacturer from the list on the Manufacturer screen (IA Home Page), the manufacturer's Product Line Summary page is displayed.

The IA will be capable of manipulating the product lines from this page, such as changing the status, emailing or printing a CAR, viewing the details of a product line, and viewing manufacturer details.

Note: Select the “Deselect All” button to clear all the checked boxes prior to selecting a status change and the update button.

6.1 Selecting Product Lines Status (Viewing)

The default product line status is “Active Only”, to modify the viewing, click the pull down arrow and select “Show All”.

Figure 6.1: Status Views

Product Line Summary: 123XYZ Company

Select Line Status:	Active Only ▾	Remove Paging	Cl
CPD Number	Grouped With	Status Code	Series/Model Number
XYZ-T-75			NEW-08-06-29

Product Line Summary: 123XYZ Company

Select Line Status:	Active Only ▾	Remove Paging	Cl
CPD Number	Grouped With	Status Code	Series/Model Number
XYZ-T-75			NEW-08-06-29

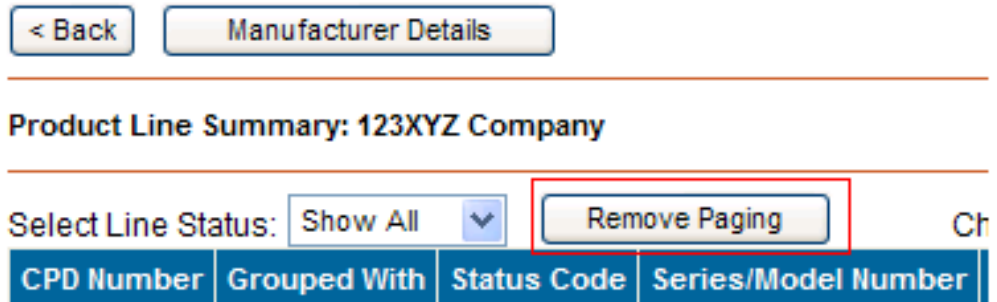
Note: In this screenshot, the dropdown menu for 'Select Line Status' is open, showing 'Active Only' and 'Show All' options.

6.2 Viewing Amount of Product Lines

Depending on the amount of manufacturer's product lines the screen can be modified to be viewed by single or a multiple page view.

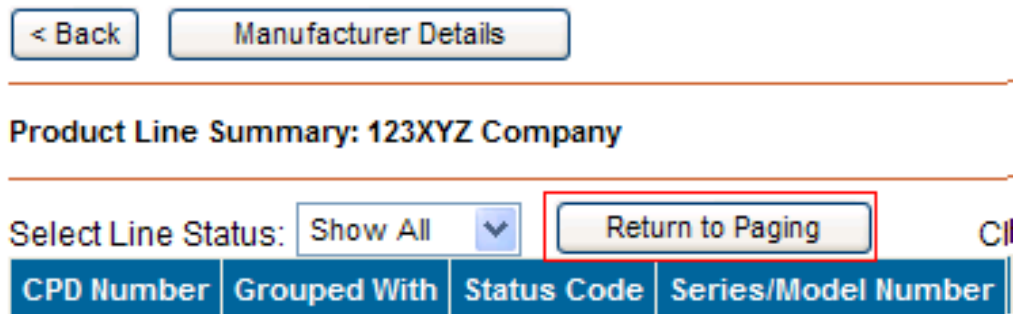
To view ALL product lines, click on the "Remove Paging" button.

Figure 6.2: Paging Option – Remove Paging



To view a limited number of product lines in a paging view, click on the "Return to Paging" button.

Figure 6.3: Paging Option – Return to Paging



6.3 Changing Statuses

The IA can modify the product line or individual products statuses by selecting the desired status, selecting the Change Line Status or Change Product Statuses boxes and clicking the "Update" button.

Note: This feature can be applied to multiple product lines desiring the same status change.

Status Definitions:

- 01 – Manufacturer Voluntary Termination:** This code deactivates the product or product line per the manufacturer's request when terminating from the Certification Program, or terminating a particular product from the certification program; the product or

product line is not reflected in the Certified Products Directory (“directory”).

- 02 – IA Suspension:** This code deactivates the product line due to suspension of certification authorization; the product is not reflected in the directory.
- 03 – Failed Performance Challenge:** This code indicates that the product failed a challenge that was submitted against it; the challenge is upheld by NFRC so the product is deactivated accordingly with this code.
- 04 – Product Re-issued:** If a manufacturer/client requests that a product line series/model name be changed for a particular authorized product, the change is completed by coding out the previous product with this code and reissuing the product in the new series/model name. Reports are subsequently reissued in the new name. This code deactivates the product line.
- 05 – Archived Product Data:** To be utilized at the individual product level and not product line level; indicates that the particular product was archived at the time of recertification.
- 06 – Do Not Print in Directory:** Product line remains active but is not listed in the directory.
- 07 – Product Line Expired:** This code deactivates the product line that has expired.
- 08 – Issue CAR only, Do not Print in CPD:** Individual product remains active but not reflected in directory.
- 09 – Granted 6-month Extension:** Product line remains active for an additional 6 months from the expiration date.
- 10 – Site-Built Product:** Product line remains active but is not reflected on the IA billing report.
- 11 – IA Revocation:** This code deactivates the product line due to denial or revocation of certification authorization; the product is not reflected in the directory.
- 12 – Product Line Transfers:** Indicates the product line has been transferred to another inspection agency.

6.3.1 Changing Product Line(s) Status

To change the status of the Product Line only, select the box(es) in the Change Line Status column for the corresponding product line(s) row(s). Choose the desired status using the pull down menu and click the “Update” button.

Figure 6.4: Changing Product Line Status

CPD Number	Grouped With	Status Code	Series/Model Number	Operator Type	Initial Certification Date	Certification Date	Expiration Date	Change Line Status	Change Product Statuses	Car Reports
XYZ-T-75			NEW-08-06-29	VSDH	9/4/2008	9/4/2008	6/29/2012	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6.3.2 Changing Individual Products Statuses

To change the status of the Individual Products within a product line, select the box(es) in the Change Product Statuses column for the corresponding product line(s) row(s). Choose the desired status using the pull down menu and click the “Update” button.

Figure 6.5: Changing Individual Product Status

CPD Number	Grouped With	Status Code	Series/Model Number	Operator Type	Initial Certification Date	Certification Date	Expiration Date	Change Line Status	Change Product Statuses	Car Reports
XYZ-T-75			NEW-08-06-29	VSDH	9/4/2008	9/4/2008	6/29/2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XYZ-T-76			NEW-08-08-21-NEW	HSXX	9/6/2008	9/6/2008	1/1/2012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6.4 Generating CAR Reports

The IA can generate CAR reports for single or multiple product lines. These reports can be emailed or printed as PDF files.

Figure 6.6: Generating CAR Reports

Check to create separate report for each product line :

CPD Number	Change Product Statuses	Car Reports
XYZ-T-75	<input type="checkbox"/>	<input checked="" type="checkbox"/>
XYZ-T-76	<input type="checkbox"/>	<input checked="" type="checkbox"/>
XYZ-T-77	<input type="checkbox"/>	<input type="checkbox"/>

6.4.1 Emailing CAR Reports

To email a single or multiple CAR reports, select the box(es) in the CAR Reports column for the corresponding product line(s) row(s). To generate separate PDF files for each CAR report, select the “Check to

create separate report for each product line” box above the columns. Click the “Email Reports” button. (See figure 6.6)

The reports will be emailed to the IA user.

6.4.2 Run CAR Reports

To run single or multiple CAR reports, select the box(es) in the CAR Reports column for the corresponding product line(s) rows(s). To generate separate PDF files for each CAR report, select the “Check to create separate report for each product line” box at the top of the page. Click the “Run Reports” button. The CAR report(s) will be opened in a separate internet browser screen with the ability for the user to save the CAR as a PDF file. If separate CAR reports were requested, multiple screens will appear. (See figure 6.6) **Note: If a separate internet browser screen does not appear, change your pop-up settings to allow pop-ups from this website.**

6.5 Viewing Manufacturer Details

The IA can view the manufacturer’s details by selecting the Manufacturer Details button at the top of the screen.

Figure 6.7: Manufacturer Product Line Summary Screen



Figure 6.8: Result of selecting the manufacturer details button:

GENERAL INFO		LICENSING INFO		CONTACTS						
Name:	123XYZ Company	Status:	Active	First Name	Last Name	Phone	Alt Phone	Fax	Email Address	Contact Type
ID:	860	Initial Certification Date:	10/25/2006	Scott	Hanlon	301-589-1776	240-821-9519		shanon@nfrcc.org	Primary
Code:	XYZ	PCP Packet Sent:	12/25/2002							
Address 1:	6305 Ivy Lane	License Agreement Received:	1/1/2003							
Address 2:	Suite 140	Termination Date:								
Address 3:		INSPECTION AGENCIES								
City:	Greenbelt	National Fenestration Rating Council								
State:	MD	PROGRAM PARTICIPATION								
Postal Code:	20770	Fabricator								
Country:	USA	Lineal Supplier								
Telephone:	301-589-1776	Site Built Manufacturer								
Fax:	301-589-3884	AVAILABLE REPORTS								
		Schedule I								
		Schedule II								
		Schedule III								
PLANTS		Name	Location	Contact	Phone	Status				
		123XYZ Plant 2	St. Augustine, FL	Jessica Ferris	301-589-1776	Active				
		National Fenestration Rating Council Office Building	Silver Spring, MD			Active				
		Jan Doe Shopping Center	Anyplace, MA			Active				
		John Doe Library	Someplace, IA			Active				
		Test Plant	Pleasantville, PA	Contact Name II	717 555-1212	Active				
		Test Plant 10	Anywhwere, DC	Contact Name III	555-555-1212	Active				
		mine	testville, md			Inactive				
		Mine too	Nowhere, md			Inactive				
		Mine Three	Nowhere, md			Active				

6.5.1 Viewing Available Reports

The IA can view the manufacturer's Schedules listed in the Available Reports Box by selecting the corresponding schedule's hyperlink.

Figure 6.9: Result of selecting the manufacturer's Schedule I hyperlink:

Back Product Lines Run Report Email Report

PLANTS						
Name	Location	Contact	Phone	Fax	Email	Status
123XYZ Plant 2	Somewhere in St. Augustine, FL St. Augustine, FL Mickeyland	Jessica Ferris	301-589-1776	301-589-3884	jferris@nfrc.org	Active
National Fenestration Rating Council Office Building	8484 Georgia Avenue Suite 320 Silver Spring, MD 20910			(301) 589-3884		Active
Jan Doe Shopping Center	123 Oak Street Anyplace, MA 01234			(514) 555-1234		Active
John Doe Library	123 Redwood Street Someplace, IA 67899			(666) 555-9999		Active
Test Plant	5555 Strawberry Fields Pleasantville, PA 17555	Contact Name II	717 555-1212	717 555-1234		Active
Test Plant 10	555 Maple Avenue Anywhere, DC 20008	Contact Name III	555-555-1212	555-555-1212		Active
mine	123 My Way or Highway 123 Again St testville, md 21110					Inactive
Mine too	123 My Way or Highway Nowhere, md 21011					Inactive
Mine Three	123 My Way or Highway Nowhere, md 21011					Active

Figure 6.10: Result of selecting the manufacturer's Schedule II hyperlink:

Back Add Associations Select a Manufacturer:

123XYZ Company		
CPD Number	Series/Model Designation	Production Plant(s) Location
XYZ-T-75	NEW-08-06-29	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland
XYZ-T-76	NEW-08-08-21-NEW	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland
XYZ-T-77	Test #001a	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland

6.5.2 Adding Plants Associations

After selecting the Schedule II hyperlink, the IA can add a Plant to Associated Product lines by following these steps:

1. Click on "Add Associations" button

Back Add Associations Select a Manufacturer:

123XYZ Company

Select Plant:

Available Product Lines:	Associated Product Lines:
<input type="text"/>	<input type="text"/>
	<input type="button" value="Add >"/> <input type="button" value="Add All >>"/> <input type="button" value="< Remove"/> <input type="button" value="<< Remove All"/>

2. Using Pull Down Arrow, select a plant

Back Add Associations Select a Manufacturer: 123XYZ Company

123XYZ Company

Select Plant:

- 123XYZ Plant 2
- National Fenestration Rating Council Office Building
- Jan Doe Shopping Center
- John Doe Library
- Test Plant
- Test Plant 10
- mine
- Mine too
- Mine Three
- The Losers Plant

Associated Product Lines:

Add > Add All >> < Remove << Remove All

Done

3. The available and associated Product Lines will populate.

Back Add Associations Select a Manufacturer: 123XYZ Company

123XYZ Company

Select Plant:
123XYZ Plant 2

Available Product Lines:

- XYZ-T-78
- XYZ-T-79

Associated Product Lines:

- XYZ-T-75
- XYZ-T-76
- XYZ-T-77

Add > Add All >> < Remove << Remove All

Done

4. Select available product lines individually, or use the buttons in the middle to add or remove the product lines and select the “Done” button.

Back Add Associations Select a Manufacturer: 123XYZ Company

123XYZ Company

Select Plant:
123XYZ Plant 2

Available Product Lines:

- XYZ-T-78

Associated Product Lines:

- XYZ-T-75
- XYZ-T-76
- XYZ-T-77
- XYZ-T-79

Add > Add All >> < Remove << Remove All

Done

Figure 6.11: Results of adding an associated product line:

Back Add Associations Select a Manufacturer: 123XYZ Company

123XYZ Company		
CPD Number	Series/Model Designation	Production Plant(s) Location
XYZ-T-79	Simulation Upload - 001	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland
XYZ-T-75	NEW-08-06-29	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland
XYZ-T-76	NEW-08-08-21-NEW	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland
XYZ-T-77	Test #001a	Somewhere in St. Augustine, FL * St. Augustine, FL Mickeyland

6.5.3 Viewing Plant Details

The IA can view a manufacturer’s plant detail by selecting the hyperlink of a plant listed. The IA can select the Edit button and edit the plant details. **Note: Contacts can only be edited by NFRC staff.** To request an update please send an email to support@nfr.org.

Figure 6.12: Results of selecting a plant hyperlink:

< Back Manufacturer Details

PLANT DETAILS		CONTACTS Add Contact						
Plant Name	National Fenestration Rating Council Office Building	First Name	Last Name	Phone	Alt Phone	Fax	Email Address	Contact Type
Address Line #1	8484 Georgia Avenue	Jane	Doe	(301) 589-1776		(301) 589-3884	joe@nfr.org	Secondary
Address Line #2	Suite 320							
Address Line #3								
City	Silver Spring							
State	MD							
Postal Code	20910							
Phone	(301) 589-1776							
Fax	(301) 589-3884							
Country	USA							
Status	Active							

Edit Cancel

Figure 6.13: Results of selecting the Edit button:

< Back

PLANT DETAILS	
Plant Name	123XYZ Plant 2
Address Line #1	Somewhere in St. Augustine, FL
Address Line #2	
Address Line #3	
City	St. Augustine
State	FL
Postal Code	Mickeyland
Phone	301-589-1776
Fax	301-589-3884
Country	USA
Status	Active

Save Cancel

7. PRODUCT LINE DETAIL PAGE

After selecting a CPD number hyperlink from the Product Line Summary screen, the product line's details are displayed.

The IA will be capable of manipulating the individual products from this page, such as changing individual products' statuses. The IA will have the ability to edit the product line information details and the ability to view manufacturer details.

Note: Select the “Deselect All” button to clear all the checked boxes prior to selecting a status change and the update button.

Figure 7.1: Product Line Details Screen

The screenshot shows the 'CERTIFIED PRODUCTS DIRECTORY' interface. At the top, there are navigation tabs: Status, Manufacturer, NFRC Reports, IA Info, My Account, and Codes. Below these is a 'Log off' button and a 'Welcome shanlon-ia' message. The main content area is titled 'Manufacturer Details' and contains several information panels:

- GENERAL INFORMATION:** Manufacturer: 123XYZ Company, Series: New with Streamline, CPD #: XYZ-T-77, Operator Type: D ASD, Item Type: D, Test Only: No, Grouped: No, Rating Procedure: 2004, Status: [dropdown].
- MATERIAL INFORMATION:** Thermal Break: N, Frame Absorption: [dropdown], Air Leakage: [dropdown], Certification Dates: Initial: 4/3/2009 3:26:24 PM, Recertification: [dropdown], Expiration: 1/1/2013.
- SIMULATION INFORMATION:** Lab Code: SNFR, Report Date: 4/1/2009, Received Date: 4/1/2009, Revision Date: 4/1/2009, Sim Rpt Number: first new, Size: 1000mm x 2000mm.
- TEST VALIDATE:** Test Lab Code: TNFR, Standard U-Factor: 0.36200, Size: 1200mm x 1500mm, Test Date: 1/1/2009, Report Revision Date: 2/1/2009, Report Received Date: [dropdown], Report Number: Try #1.
- COMMENTS:** [Text area]

Below these panels is an 'Edit Product Line' button. The 'RATINGS INFORMATION' section includes a 'View All' button, a 'Select Product Status' dropdown, a 'Change Selected To' dropdown, and 'Update', 'Select All', and 'Deselect All' buttons. A table follows with columns for Change Status, Status Code, CPD #, Mfr Product Code, Report Number, Frame / Sash Type, U-factor, SHGC, VT, Condensation Resistance, Frame Emissivity, Glazing Layers, Low-E / Internal Film (Surface), Spacer, Gap Widths, Fill, Grid, Dividers, and Tint.

Change Status	Status Code	CPD #	Mfr Product Code	Report Number	Frame / Sash Type	U-factor	SHGC	VT	Condensation Resistance	Frame Emissivity	Glazing Layers	Low-E / Internal Film (Surface)	Spacer	Gap Widths	Fill	Grid	Dividers	Tint
<input type="checkbox"/>		XYZ-T-77-00001-00001	Embossed Panel, 1/4 Lbs. With and without grids.	first new	WD/WF	0.17	0.01	-	-	0.900000			N			N	NA	OT
<input type="checkbox"/>		XYZ-T-77-00002-00001	Embossed Panel, 1/4 Lbs. With and without grids.	first new	WD/WF	0.17	0.01	-	-	0.900000	2	0.044(2)	A1-D	0.748031496062992	Fill 1: AIR (100)	N	NA	LE
<input type="checkbox"/>		XYZ-T-77-00006-00001	Embossed Panel, 1/2 Lbs. With and without grids.	first new	WD/WF	0.26	0.01	-	-	0.900000	2		A8-S	0.748031496062992	Fill 1: AIR (100)	N	NA	LE

7.1 Edit Product Line Header Information

The IA has the ability to edit the product line header data located in the general information, additional ratings, simulation information, test validate, and comment boxes by selecting the “Edit Product Line” button.

7.1.1 Edit General Information

The IA can edit the series name, the operator type, and the status of the product line in the General Information section.

Figure 7.2: Edit General Information

The screenshot shows the 'GENERAL INFORMATION' form with the following fields:

- Manufacturer: 123XYZ Company
- Series: New with Streamline
- CPD #: XYZ-T-77
- Operator Type: D ASD - Dynamic Attachment for Swinging Doors
- Item Type: D
- Test Only: No
- Grouped: No
- Rating Procedure: 2004
- Status: [dropdown]

7.1.2 Edit Material Information

The IA can edit the Frame Absorptance of the product line in the Material Information section.

Figure 7.3: Edit Material Information

MATERIAL INFORMATION	
Thermal Break:	N
Frame Absorptance:	<input type="text"/>

7.1.3 Edit Additional Ratings

The IA can edit the Air Leakage rating of the product line in the Additional Ratings section.

Figure 7.4: Edit Additional Ratings

ADDITIONAL RATINGS	
Air Leakage:	<input type="text"/>

7.1.4 Edit Certification Dates

The IA can edit the recertification date and expiration date of the product line in the Certification Dates section.

Figure 7.5: Edit Certification Dates

CERTIFICATION DATES	
Initial:	4/3/2009 3:26:24 PM
Recertification:	<input type="text"/>
Expiration:	1/1/2013

7.1.5 Edit Simulation Information

The IA can edit the date the IA received the simulation report, the revision date, and simulation report number in the Simulation Information section. **Note: Currently the revision date cannot be edited to be today's date.**

Figure 7.6: Edit Simulation Information

SIMULATION INFORMATION	
Lab Code:	SNFR
Report Date:	4/1/2009
Received Date:	<input type="text" value="4/1/2009"/>
Revision Date:	<input type="text" value="4/11/2009"/>
Sim Rpt Number:	<input type="text" value="first new"/>
Size:	1000mm x 2000mm

7.1.6 Edit Test Validate Information

The IA can edit the test date, the report revision date, and the date IA received the test report in the Test Validate section.

Figure 7.7: Edit Test Validate Information

TEST VALIDATE	
Test Lab Code:	TNFR
Standard U-Factor:	0.36200
Size:	1200mm x 1500mm
Test Date:	<input type="text" value="1/1/2009"/>
Report Revision Date:	<input type="text" value="2/1/2009"/>
Report Recieved Date:	<input type="text"/>
Report Number:	Try #1

7.1.7 Adding Comments to the Product Line Details

The IA can add any desired comments in the Comments box.

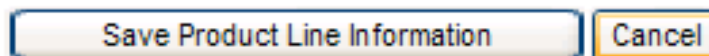
Figure 7.8: Edit Test Validate Information

COMMENTS
<input type="text"/>

NOTE: The comment field allows a max of 512 characters. Comments cannot be completely removed / deleted, but can be replaced with new comments.

7.1.8 Saving Product Line Information

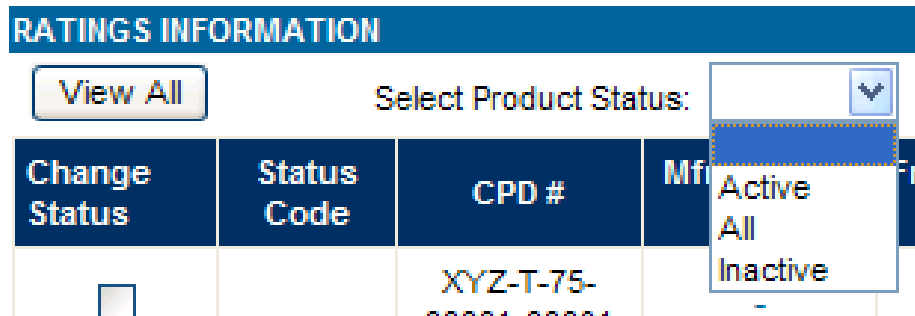
To save all updated information the “Save Product Line Information” button must be selected.



7.2 Selecting Product Status (Viewing)

The default individual product status is “Active”, to modify the viewing, click the pull down arrow and select “All” or “Inactive”

Figure 7.9: Viewing Options

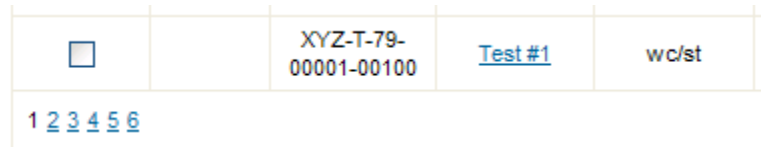


7.3 Viewing Amount of Individual Products

Depending on the amount of individual products within a product line the screen can be modified to be viewed in a single or a multiple page view.

To maneuver while in the “paging” view, the IA can click between the pages uses two methods.

- 1) Use the pages number hyperlinks located at the bottom of the page; or



Key:

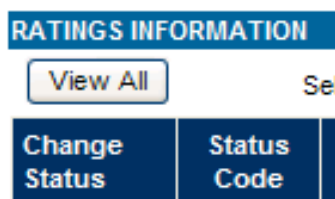
2 values for U-Factor, SHGC, and VT indicate Res/Non-Res ratings.

* indicates that certified SHGC/VT values are available from the manufacturer

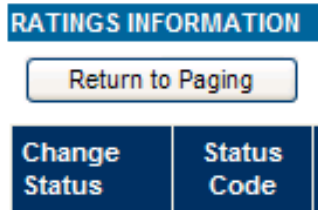
- 2) Use the <<page>> hyperlinks located on the upper right side of page.



To view ALL the individual products, click on the “VIEW ALL” button at top left of page.



To view a limited number of individual products in a paging view, click on the “Return to Paging” button at top left of page.



7.4 Product Line Detail columns

7.4.1 Changing Statuses

The IA can modify the individual products statuses by selecting the desired status, selecting the individual product(s), and clicking the “Update” button. Refer to Section 6.3 for the different statuses.

Note: This feature can be applied to multiple individual products desiring the same status change. The IA can ‘Select All’ or ‘Deselect All’ the individual products in the list by using the corresponding button to the right of the ‘Update’ button.

Figure 7.9: Changing Statuses

The screenshot shows the "RATINGS INFORMATION" interface. At the top, there is a "View All" button, a "Select Product Status:" dropdown, a "Change Selected To:" dropdown, and buttons for "Update", "Select All", and "Deselect All". Below this is a table with the following columns: Change Status, Status Code, CPD #, Mfr Product Code, Report Number, and a dropdown menu for changing status. The table contains four rows of data.

Change Status	Status Code	CPD #	Mfr Product Code	Report Number	Change Selected To:	Condensation Resistance	Frame Emissivity	Glazing Layers
<input checked="" type="checkbox"/>		XYZ-T-77-00001-00001	Embossed Panel, 1/4 Lite, With and without grids.	first new	01 - Manufacturer Voluntary Termination	-	0.900000	
<input type="checkbox"/>		XYZ-T-77-00002-00001	Embossed Panel, 1/4 Lite, With and without grids.	first new	02 - Suspension	-	0.900000	2
<input type="checkbox"/>		XYZ-T-77-00026-00003	Embossed Panel, 1/4 Lite, With group leader grids.	first new	03 - Failed Performance Challenge	-	0.900000	2
<input type="checkbox"/>		XYZ-T-77-00026-00004	Embossed Panel, 1/4 Lite, With group leader grids.	first new	04 - Product Re-issued	-	0.900000	2

7.4.2 Status Code

The status code of the individual product option is reflected in this column. Refer to Section 6.3 for definition of statuses. (i.e. 01)

7.4.3 CPD

This column displays the full CPD number of the individual product option. (i.e. XYZ-T-77-00001-00001)

7.4.4 MFR Product Code

This is a free-form field that manufacturers can use to enter additional information about the (reference or option) product which corresponds to the MFR Product Column in the simulation upload spreadsheet.

This field can be edited by the IA:

1. Select the text or dash (if blank) hyperlink in the cell.

Change Status	Status Code	CPD #	Mfr Product Code
<input type="checkbox"/>		XYZ-T-77-00001-00001	<u>Embossed Panel. 1/4 Lite. With and without grids.</u>

Select text

Result of selecting Mfr Product Code will display and edit screen. Select Edit.

	Change Status	Status Code	CPD #	Mfr Product Code
Select text	Edit	<input type="checkbox"/>	XYZ-T-77-00001-00001	Embossed Panel. 1/4 Lite. With and without grids.

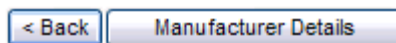
- The Mfr Product Code field will be now editable. Edit the text and select Update to save or Cancel to discard any changes.

	Change Status	Status Code	CPD #	Mfr Product Code
Select text	Update Cancel	<input type="checkbox"/>	XYZ-T-77-00001-00001	Embossed Panel. 1/4 Lite.

Result of editing MFR Product Code

	Change Status	Status Code	CPD #	Mfr Product Code
	Edit	<input type="checkbox"/>	XYZ-T-77-00001-00001	Revised MFR Code by IA

- Select the CPD “Back” button to display entire product line with updates.



7.4.5 Report Number

This column displays the associated simulation report for each individual product.

The data in this column is generated from the report number off the corresponding simulation spreadsheet that created the individual product option when the product data was generated.

7.4.5.1 Report number from initial certification

A submitted simulation upload spreadsheet for initial certification generates a new product line when accepted by the IA. All of the individual product options in the product line’s details will have the same report number listed in the report number column from that simulation spreadsheet.

7.4.5.2 Revision or Addendum Report Types

A submitted simulation upload spreadsheet for revisions or additions of certified options generates a revision or addendum to an existing product line when accepted by the IA. Only those individual product options affected by the acceptance in the product line's details will have the updated report number listed in the report number column from that simulation spreadsheet. The original report number will still be listed for the unaltered individual product options.

7.4.5.3 Recertification

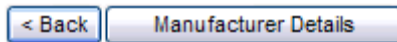
A submitted simulation upload spreadsheet for recertification will archive previous options and generate new options to the next available option number in the product line when accepted by the IA. All of the individual product options in the product line's details will have the same report number listed in the report number column from that recertification simulation spreadsheet.

7.4.6 Product Description and Rating Values

These columns display the product description codes and rating values for each individual product option in the product line which correspond to what was submitted in the simulation upload spreadsheet.

7.5 Viewing Manufacturer Details

By selecting the Manufacturer Details button, the IA can view the manufacturer's details. Refer to Section 6.5 for navigation.



8. STATUS PAGE (REPORTS)

The Status screen allows the IA to monitor and select uploaded spreadsheets to review. The Inspection Agency will be able to select a manufacturer's data via a report hyperlink. To review the report details, select the appropriate report hyperlink.

The page automatically defaults to Unverified Reports, but has sorting options and filters.

Figure 8.1: Status Page Screen

Report Number	Report Spreadsheet	Report Type	Status	Accept/Reject Date	Manufacturer	Mfr Code	Mfr ID	Lab	Submitted By	Upload Date	Change Status
NEW-08-21-2008N-001a	NEW-001T-08-08-21-New.xls	New	Viewed by IA		123XYZ Company	XYZ	860	TNFR	shanton-iaab	9/15/2008 11:01:20 AM	<input type="checkbox"/>
08/08/21-NEW	NEW-001S-08-08-21-N.xls	New	Viewed by IA		123XYZ Company	XYZ	860	SNFR	shanton	9/15/2008 11:00:38 AM	<input type="checkbox"/>

Figure 8.2: Available Filters

Available Filters

Report Status: All Unverified Rejected Accepted Failed Error Check Published

Manufacturer: Name Code or ID

Uploaded Since:

8.1 Available Filters and Sorting

The available filters can be sorted by Report Status, Manufacturer, or Uploaded Since date. Select the corresponding radio buttons, fill in the applicable information and click the “Apply Filters” button.

1. Report Status – Reports can be sorted by All, Unverified, Rejected, Accepted, Failed Error Check, or Published.
2. Manufacturer – Reports can be sorted by manufacturer's name, three-character alpha code or three-digit numeric ID.

3. Uploaded Since – Reports can be sorted by the Uploaded Since feature: enter the earliest report submission date you would like to be displayed.
4. Alternatively, the IA can sort by using the column headers above the submitted report information; select any of the headers to arrange reports in alpha or numerical order, select header again to reverse the order of reports listed.

***Note: When applying filters, you must click the Apply Filters button; afterward, you must also click the Remove Filters button to restore the default Unverified status during your session.**

Figure 8.3: A convenient reminder set in the Report Status Screen

How To Use Filtering

By default, this page displays the list of **Unverified** reports associated with your account. To see reports with a different status:

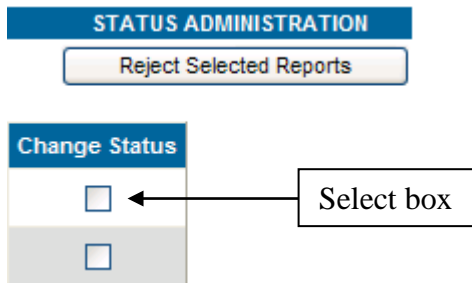
1. Select the **Report Status** you would like to see.
2. Optionally, select a **Manufacturer** by entering a Code, ID or portion of a Name.
3. Optionally, enter the earliest report-submission date you wish to see.
4. Click on the **Apply Filters** button.

To return to the default view, click on the **Remove Filters** button

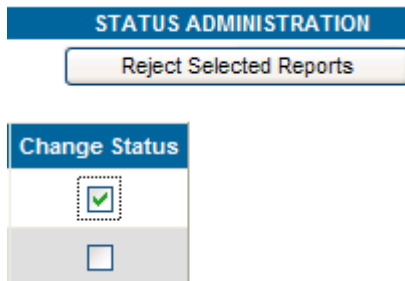
8.2 Changing Upload Spreadsheet Report Status

An upload spreadsheet can be rejected from the Status Page by selecting the box(es) in the Change Status column for the corresponding upload spreadsheet(s) row(s) and by clicking the “Reject Selected Reports” button.

- 1) Select check box to the corresponding upload spreadsheet row.



- 2) Select Reject Selected Reports button to reject selected upload spreadsheets. **NOTE: The simulation or test lab will need to be notified by the IA, an email will not be automatically sent at this time.**



9. REVIEWING A REPORT

Upon selecting a report hyperlink, the laboratory data file detail screen will be displayed.

Figure 9.1: Simulation Report Detail Screen

<< Back Accept Reject Start Validation

GENERAL INFORMATION		PRODUCT-LINE INFORMATION		File Version	COMMENTS
Report Type:	New	CPD Number:		Report Type: CPD 2.0	<input type="button" value="Add Comment"/>
Revision Date:	5/1/2009	Model / Series:	Initial Upload		
Mfr Name:	123XYZ Company	Operator Type:	HSXX		
Lab Code:	SNFR	Thermal Break Type:	N		
IA Code:	T	2004 Model Size:	1200mm x 1500mm		
Uploaded By:	shanlon	Rating Procedure:	2004		
Upload Date:	5/12/2009	Report Number:	Initial Report #		

SIMULATION REPORT DETAILS																				
<< First < Previous Next > Last >> 250 rows																				
Mfr Prod Code	Product Number	Pane ID #1	Pane ID #2	Pane ID #3	Pane ID #4	Pane ID #5	Pane ID #6	Pane ID #7	Pane ID #8	Pane Thickness #1	Pane Thickness #2	Pane Thickness #3	Pane Thickness #4	Pane Thickness #5	Pane Thickness #6	Pane Thickness #7	Pane Thickness #8	Gap 1	Gap 2	Gap 3
Example #1	1	9001	9001							0.125	0.125									0.5
Example #2	2	9002	9003							0.125	0.125									0.5
Validation Option	0	9001	9001							0.125	0.125									0.5

Figure 9.2: Test Report Detail Screen

<< Back Reject Start Validation

GENERAL INFORMATION		PRODUCT-LINE INFORMATION		COMMENTS		
Report Type:	New	Model / Series:	Test #12-19-2007a	Comment	Creator	Date
Mfr Name:	123XYZ Company	Operator Type:	VSDH	Test Upload - User Guide Example	shanlon-tlab	12/21/2007 10:17:16 PM
Lab Code:	TNFR	Thermal Break Type:	N	<input type="button" value="Add Comment"/>		
IA Code:	T	Specimen Size:	1200mm x 1500mm			
Uploaded By:	shanlon-tlab	Rating Procedure:	2004			
Upload Date:	12/21/2007					

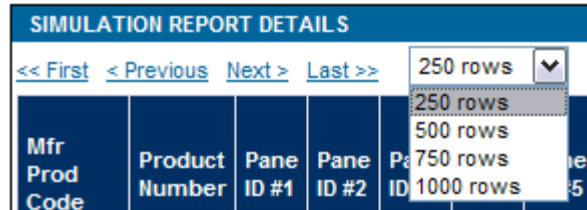
PHYSICAL TEST DETAILS														
<< First < Previous Next > Last >>														
Mfr Prod Code	Product Number	Pane Thickness #1	Pane Thickness #2	Pane Thickness #3	Pane Thickness #4	Pane Thickness #5	Pane Thickness #6	Pane Thickness #7	Pane Thickness #8	Gap 1	Gap 2	Gap 3	Gap 4	Gap 5
Thermal Test	000	0.125	0.125							0.500				
SHGC	001	0.125	0.125							0.500				

9.1 Reviewing Upload Spreadsheet

The IA can review the uploaded data, accept or reject the upload spreadsheet, add comments, and validate the simulation.

9.1.1 Viewing Additional Rows of Spreadsheet

The default display at the simulation report detail page is 250 rows. The IA can select the pull down menu to select additional rows in 250 increments.



9.1.2 Saving Comments

If the Test or Simulation Lab provided any comments, they will be visible when first viewing the Report Detail page. To add a comment, select the “Add Comment” button, type comment in the window box provided, and select “Save”. The comment will then be visible on the page for the lab to view:

Figure 9.3: Detailed view of Comment field and message at Simulation page.

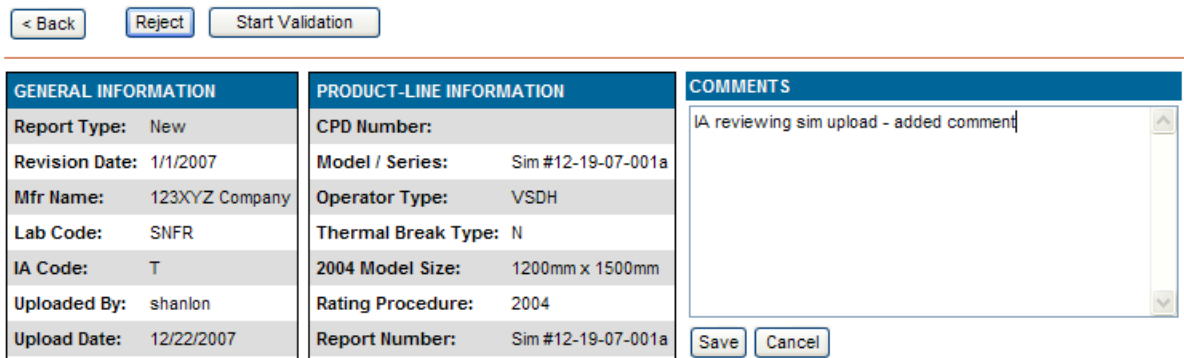


Figure 9.4: Detailed view of saved comment.

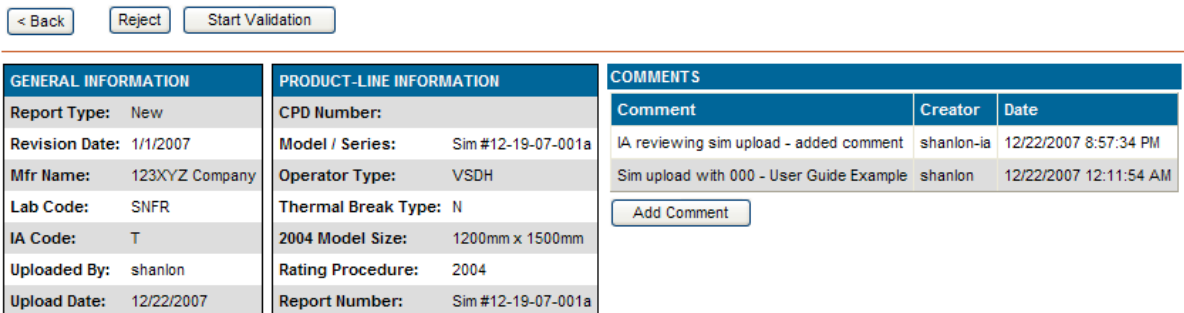


Figure 9.5: Detailed view of Comment field and message at Test page.

< Back Reject Start Validation

GENERAL INFORMATION	PRODUCT-LINE INFORMATION	COMMENTS
Report Type: New	Model / Series: Test #12-19-2007a	IA to Start Validation - this is theTLAB data
Mfr Name: 123XYZ Company	Operator Type: VSDH	
Lab Code: TNFR	Thermal Break Type: N	
IA Code: T	Specimen Size: 1200mm x 1500mm	
Uploaded By: shanlon-tlab	Rating Procedure: 2004	
Upload Date: 12/21/2007		
		Save Cancel

Figure 9.6: Detailed view of saved comment.

< Back Reject Start Validation

GENERAL INFORMATION	PRODUCT-LINE INFORMATION	COMMENTS									
Report Type: New	Model / Series: Test #12-19-2007a	<table border="1"> <thead> <tr> <th>Comment</th> <th>Creator</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>IA to Start Validation - this is theTLAB data</td> <td>shanlon-ia</td> <td>12/22/2007 12:23:17 AM</td> </tr> <tr> <td>Test Upload - User Guide Example</td> <td>shanlon-tlab</td> <td>12/21/2007 10:17:16 PM</td> </tr> </tbody> </table>	Comment	Creator	Date	IA to Start Validation - this is theTLAB data	shanlon-ia	12/22/2007 12:23:17 AM	Test Upload - User Guide Example	shanlon-tlab	12/21/2007 10:17:16 PM
Comment	Creator	Date									
IA to Start Validation - this is theTLAB data	shanlon-ia	12/22/2007 12:23:17 AM									
Test Upload - User Guide Example	shanlon-tlab	12/21/2007 10:17:16 PM									
Mfr Name: 123XYZ Company	Operator Type: VSDH	Add Comment									
Lab Code: TNFR	Thermal Break Type: N										
IA Code: T	Specimen Size: 1200mm x 1500mm										
Uploaded By: shanlon-tlab	Rating Procedure: 2004										
Upload Date: 12/21/2007											

9.1.3 Starting the validation process

Organizing, reviewing, and accepting a validation for product lines that require a validation test by utilizing the Start Validation button.

CPD 2.0 determines simulation and test upload sheets containing a “0” validation option that will be part of a validation sequence. Product lines uploaded under the Report Type of “New” or “Recertification” will be capable of proceeding to the validation process. Product lines that are uploaded in accordance with Validation Grouping and /or as “simulation” or “test only” products will not take part in the validation process.

To move forward in the validation process, select the Start Validation button.

Section 10 of this document provides details on the Validation process.

9.1.4 Accepting Spreadsheets

Publishing a product line requires the accepting of the spreadsheets associated with the produce line. For products requiring validation, three (3) acceptances are required: simulation and test upload spreadsheets, and the validation of the corresponding product line. Once the IA determines that the simulation and test data are correct,

the IA can follow one of two methods to accept each spreadsheet in order to publish product lines.

9.1.4.1 Accepting Each Spreadsheet Manually

The IA can visit each spreadsheet and select the “Accept” button for each upload spreadsheet. To generate the product line, refer to Section 9.1.7.

Figure 9.7: Simulation Report Accept Button

GENERAL INFORMATION	
Report Type:	New
Revision Date:	5/1/2009
Mfr Name:	123XYZ Company
Lab Code:	SNFR
IA Code:	T
Uploaded By:	shanlon
Upload Date:	5/12/2009

Figure 9.8: Test Report Accept Button

GENERAL INFORMATION	PRODUCT-LINE INFORMATION
Report Type: New	Model / Series: Initial Validation
Mfr Name: 123XYZ Company	Operator Type: HSXX
Lab Code: TNFR	Thermal Break Type: N
IA Code: T	Specimen Size: 1200mm x 1500mm
Uploaded By: shanlon-rlab	Rating Procedure: 2004
Upload Date: 5/12/2009	

Figure 9.9: Simple Addendum Report Accept Button

By checking this box

GENERAL INFORMATION	
Report Type:	Simple Addendum
Revision Date:	5/1/2009
Mfr Name:	123XYZ Company
Lab Code:	SNFR
IA Code:	T
Uploaded By:	shanlon
Upload Date:	5/13/2009

For a “New” or “Recertification” simulation spreadsheet that does not contain a “0” validation option because the validation is associated as a grouped validation, the IA will associate this upload with a certified product line. Refer to Section 9.1.6 for grouping product lines.

9.1.4.2 Accepting Spreadsheets at Validation Comparison Screen

All the spreadsheets and the validation can be accepted using a check box on the validation comparison page. This process will also generate the product line. Refer to Section 10.2.5.2 to validate a product line.

9.1.4.3 Accepting Spreadsheets without a validation

An IA can accept and generate a product line for a “New” and “Recertification” report type without a validation option, and an “Addendum” and “Revision” report type at the simulation report page.

Select the box indicating that the IA will accept the simulation upload spreadsheet and generate a product line, then select the Accept button.

Figure 9.10: Streamline acceptance and product line generation

By checking this box I verify that the simulation upload is correct and that I wish to generate a Product Line.

GENERAL INFORMATION		PRODUCT-LINE INFORMATION	
Report Type:	Simple Addendum	CPD Number:	XYZ-T-79
Revision Date:	5/1/2009	Model / Series:	Simple Addendum Upload
Mfr Name:	123XYZ Company	Operator Type:	HSXX
Lab Code:	SNFR	Thermal Break Type:	N
IA Code:	T	2004 Model Size:	1200mm x 1500mm
Uploaded By:	shanlon	Rating Procedure:	2004
Upload Date:	5/13/2009	Report Number:	Simple Addendum #

9.1.5 Rejecting Upload Spreadsheets

If the IA determines that the simulation and / or the test data are incorrect, the IA can select the “Reject” button. If the rejected upload spreadsheet is currently associated with a validation, both upload spreadsheets will need to be uploaded again.

The IA will be prompted to confirm the rejection.

Figure 9.11: Rejected report notice

< Back Accept Reject Start Validation

GENERAL INFORMATION	PRODUCT-LINE INFORMATION	COMMENTS
Report Type: New	Model / Series: NEW-001T-08-08-21	Add Comment
Mfr Name: 123XYZ Company	Operator Type: VSDH	
Lab Code: TNFR	Thermal Break Type: N	
IA Code: T	Specimen Size: 1200mm x 1500mm	
Uploaded By: shanlon-flab	Rating Procedure: 2004	
Upload Date: 9/15/2008		

Windows Internet Explorer

Are you sure you want to reject this report?

OK Cancel

PHYSICAL TEST DETAILS

9.1.6 Grouped Upload Spreadsheets

A simulation uploaded without a validation option as a “New” or “Recertification” report type under a validation matrix grouped product, is required to be grouped to a certified product line.

When the IA determines that the simulation data is correct and the upload is not rejected, the IA can click the “Group Validation” button to associate this product line with a certified product line.

Figure 9.11: New or Recertification report type upload review screen

< Back Accept Reject Group Validation

GENERAL INFORMATION	PRODUCT-LINE INFORMATION	COMMENTS
Report Type: New	CPD Number:	Add Comment
Revision Date: 6/29/2008	Model / Series: NEW-08-06-29-Gr	
Mfr Name: 123XYZ Company	Operator Type: HSXX	
Lab Code: SNFR	Thermal Break Type: N	
IA Code: T	2004 Model Size: 1200mm x 1500mm	
Uploaded By: shanlon	Rating Procedure: 2004	
Upload Date: 10/28/2008	Report Number: NEW-08-29-2008-Gr	

File Version
Report Type: CPD 2.0

Figure 9.12: View after “Group Validation” button is selected:

< Back

Simulation	Group Leader
Series / Model: NEW-08-06-29-Gr	Model Name: <input type="text"/>
Product Type: New	Product Type: XYZ-T-75 NEW-08-06-29
Sim Report #: NEW-06-29-2008-Gr	Test Report #: XYZ-T-76 NEW-08-08-21-NEW
Test Date: 6/29/2008	Test Date: XYZ-T-77 Test #001a
Sim Lab: SNFR	Test Lab: XYZ-T-78 NEW-08-06-29
Upload Date: 10/28/2008	Test Lab: XYZ-T-79 Simulation Upload - 001
Grouping Type: Multi-purpose Products	Expiration Date:
	CPD Number:

Group Products Grouping Failed

A list of certified product lines associated with the same manufacturer will be available in the “group leader”.

If the group leader product line is not available, the IA can select the “Grouping Failed” button, to cancel the action. **NOTE: The upload spreadsheet will still be available for processing. Once the group leader product line is processed, go through the Group Validation again.**

If the group leader product line is available, the IA can select the “Group Products” button to associate the group leader product line with the corresponding product line.

Figure 9.13: View after a group leader product line is selected:

< Back

Simulation	Group Leader
Series / Model: NEW-08-06-29-Gr	Model Name: XYZ-T-79 Simulation Upload - 001 ▼
Product Type: New	Product Type: VSDH
Sim Report #: NEW-06-29-2008-Gr	Test Report #: Thermal Test - New 001a
Test Date: 6/29/2008	Test Date: 6/1/2008
Sim Lab: SNFR	Test Lab: TNFR
Upload Date: 10/28/2008	Expiration Date: 6/1/2012
Grouping Type: Multi-purpose Products	CPD Number: XYZ-T-79

Group Products
Grouping Failed

9.1.7 Generating a Product Line

After all the required upload spreadsheets and validations are accepted, the IA is able to use the “Generate Product Line” button located on the simulation upload screen.

< Back
Generate Product Line
Group Validation

GENERAL INFORMATION	PRODUCT-LINE INFORMATION	COMMENTS
Report Type: New	CPD Number:	Add Comment
Revision Date: 6/29/2008	Model / Series: NEW-08-06-29-Gr	
Mfr Name: 123XYZ Company	Operator Type: HSXX	
Lab Code: SNFR	Thermal Break Type: N	
IA Code: T	2004 Model Size: 1200mm x 1500mm	
Uploaded By: shanlon	Rating Procedure: 2004	
Upload Date: 10/28/2008	Report Number: NEW-06-29-2008-Gr	

File Version
Report Type: CPD 2.0

If the IA selects the “Generate Product Line” button but one of the reports are not accepted, the IA will receive the following error:

GENERAL INFORMATION	
Report Type:	New
Revision Date:	7/1/2008
Mfr Name:	123XYZ Company
Lab Code:	SNFR
IA Code:	T
Uploaded By:	shanlon
Upload Date:	10/26/2008

File Version	
Report Type:	CPD 2.0

Must accept Test report before the Line can be published.

The IA must go to the Test upload spreadsheet and select “Accept”, then go through the Simulation upload spreadsheet and select “Generate Product Line” button.

Upon completion of generating a product line, the IA can proceed to the Manufacturer screen to access the new product line, modify all product line details, and to produce a CAR per Section 6 and 7.

10. VALIDATION PROCESS

The validation process allows interaction between the Inspection Agency, Test Lab, and Simulation Lab for efficient verification of the simulation to the physical test.

For a “New” or “Recertification” report type which is not submitted for grouped validation, the validation process cannot be started without both the simulation and test upload sheets being submitted to the IA.

10.1 Validation Coordination Page

Upon selecting the Start Validation button at either a simulation or test Report Detail, the Validation Coordination page will appear. This page is where the IA will link the simulation and test option for validation comparison.

Depending on which upload spreadsheet was used to start the validation, the IA will use the pull-down menu to select the corresponding simulation or test. The drop-down list of reports available for coordination will only be for that manufacturer. Any simulation or test reports matched under another validation process will not be available. The grayed-out pull-down menu for the other report depicts the upload spreadsheet used to start the validation. **NOTE: To use streamline acceptance and product line generation process, the IA must start from the simulation report.**

10.1.1 Selecting Corresponding Report

When selecting a corresponding report, highlighting a different report will change the data listed below. This will allow the IA to review multiple reports prior to proceeding with the validation.

The IA has three choices: proceed with the validation, deem the report has no matching report available, or step back to cancel the validation process for this upload.

The pull down menu lists the Report Number and the Model Name in the listing.

Figure 10.1: Validation Coordination Page depicting Multiple Reports

The screenshot shows a web interface for validation coordination. At the top, there are two buttons: "< Back" and "Matching Report Unavailable". Below these are two main sections: "Simulation" and "Testing".

Simulation	Testing
Report - Model: Initial Report # - 'Initial Upload'	Report - Model: [Dropdown]
Product Type: HSXX	Product Type: Initial Validation Test - 'Initial Validation'
Sim Report #: Initial Report #	Test Report #: Decimal Test 1 - 'Decimal Validation'
Test Date: 5/1/2009	Test Date:
Sim Lab: SNFR	Test Lab:
U-Factor: 0.35	U-Factor:
Size: 1200mm x 1500mm	Size:
Upload Date: 5/12/2009	Upload Date:
Report Type: New	Report Type:
CPD Number:	CPD Number:

At the bottom of the Simulation section, there is a button labeled "Proceed With Validation".

Figure 10.2: Selecting a matching Report - Data Populates

< Back Matching Report Unavailable

Simulation	Testing
Report - Model: Initial Report # - 'Initial Upload'	Report - Model: Initial Validation Test - 'Initial Validation'
Product Type: HSXX	Product Type: HSXX
Sim Report #: Initial Report #	Test Report #: Initial Validation Test
Test Date: 5/1/2009	Test Date: 05/01/09
Sim Lab: SNFR	Test Lab: TNFR
U-Factor: 0.35	U-Factor: 0.362
Size: 1200mm x 1500mm	Size: 1200mm x 1500mm
Upload Date: 5/12/2009	Upload Date: 5/12/2009
Report Type: New	Report Type: New
CPD Number:	CPD Number:

Proceed With Validation

Figure 10.3: Highlighting another Report - Data Changes

< Back Matching Report Unavailable

Simulation	Testing
Report - Model: Initial Report # - 'Initial Upload'	Report - Model: Decimal Test 1 - 'Decimal Validation'
Product Type: HSXX	Product Type: FXD
Sim Report #: Initial Report #	Test Report #: Decimal Test 1
Test Date: 5/1/2009	Test Date: 01/01/09
Sim Lab: SNFR	Test Lab: TNFR
U-Factor: 0.35	U-Factor: 0.362
Size: 1200mm x 1500mm	Size: 1200mm x 1500mm
Upload Date: 5/12/2009	Upload Date: 1/20/2009
Report Type: New	Report Type: New
CPD Number:	CPD Number:

Proceed With Validation

10.1.1.1 Matching Report Unavailable

If there is no corresponding report, selecting the “Matching Report Unavailable” button, this will cancel the process and the IA Home page will appear. Using the Back button will also cancel the process. **Note: Neither of these processes will make the reports un-useable, it only returns the user to the Home page or previous screen.**

10.1.1.2 Proceed with Validation button

When the corresponding report is selected from the drop down menu, selecting the “Proceed with Validation” button will link the simulation and test report for the validation process and proceed to the Validation Comparison page. These two reports will not be available for any other validation. If either upload is rejected, the validation link is severed, requiring both sheets to be uploaded again.

10.2 Validation Comparison page

The Validation Comparison page allows the IA to review the simulation and test data from the upload sheets using a side-by-side comparison. The IA can

do the following: proceed elsewhere in the CPD, add a comment, reject the validation, accept the validation, or use the streamline process to accept the simulation and test spreadsheets and generate a product line.

10.2.1 Methods to View the Validation Comparison Page

The IA can proceed to the validation comparison page via two methods:

1. Using the “Start Validation” button located on the Report Detail page; or
2. After the IA has linked and started the validation process, has sent a “verification failed” notice, upon which the IA can use the hyperlink supplied in an email when the lab chooses the “Notify IA” button after the lab has modified the validation error.

10.2.1.1 Start Validation

Under the Status tab, select the upload spreadsheet to view the Report Detail Page. Select the “Start Validation” button to proceed to the validation comparison page and then select the “Proceed to Validation” button. If the validation process has not been started for the product line, see Section 10.1. For products under the validation process, the IA will not be able to change the reports selected as matched for validation, see example below.

Figure 10.4: Default Report Status Screen with Start Validation button

< Back Reject **Start Validation**

GENERAL INFORMATION		PRODUCT-LINE INFORMATION		COMMENTS		
Report Type:	New	CPD Number:		Comment	Creator	Date
Revision Date:	1/1/2007	Model / Series:	Sim #12-19-07-001a	IA reviewing sim upload - added comment	shanlon-ia	12/22/2007 8:57:34 PM
Mfr Name:	123XYZ Company	Operator Type:	VSDH	Sim upload with 000 - User Guide Example	shanlon	12/22/2007 12:11:54 AM
Lab Code:	SNFR	Thermal Break Type:	N	<input type="button" value="Add Comment"/>		
IA Code:	T	2004 Model Size:	1200mm x 1500mm			
Uploaded By:	shanlon	Rating Procedure:	2004			
Upload Date:	12/22/2007	Report Number:	Sim #12-19-07-001a			

Figure 10.5: Validation Coordination page - Reports previously matched are unable to be changed at this point.

< Back Matching Report Unavailable

Simulation		Testing	
Series / Model:	Sim #12-19-07-001a	Model Name:	Test #12-19-2007a
Product Type:	VSDH	Product Type:	VSDH
Sim Report #:	Sim #12-19-07-001a	Test Report #:	TNFR-12-19-2007-001a
Test Date:	1/1/2007	Test Date:	01/10/07
Sim Lab:	SNFR	Test Lab:	TNFR
U-Factor:	0.35	U-Factor:	0.350
Size:	1250mm x 1550mm	Size:	1200mm x 1500mm
Upload Date:	12/22/2007	Upload Date:	12/21/2007
<input type="button" value="Proceed With Validation"/>			

10.2.1.2 Email Hyperlink

If the lab selects the “Notify IA” button when reviewing a validation, the IA will receive an email containing a hyperlink directing the IA to the corresponding validation page.

Example Email

Dear (Username):

This is an automated response from the NFRC Certified Products Management System. Use this URL to correct information on the associated lab report(s):

http://cpd2.nfrc.org/test_validate_Compare_example=123456789

NFRC

If not logged into the CPD, the login screen will first appear prior to proceeding to the validation comparison page when using the hyperlink to access the CPD.

Figure 10.6: View of Validation Comparison Page

The screenshot displays the 'Validation Comparison Page' in the NFRC Certified Products Directory. The page is titled 'CERTIFIED PRODUCTS DIRECTORY' and includes navigation tabs for Status, Manufacturer, NFRC Reports, IA Info, My Account, and Codes. A 'Log off' link and 'Welcome shankn-la' message are visible in the top right.

Below the navigation, there is a 'Back' button and two summary tables:

SIMULATION SUMMARY				TESTING SUMMARY			
Series / Model:	Initial Upload			Series / Model:	Initial Validation		
Product Type:	HSXX			Product Type:	HSXX		
Sim Report #:	Initial Report #			Test Report #:	Initial Validation Test		
Test Date:	5/1/2009			Test Date:	5/1/2009		
Sim Lab:	SNFR			Test Lab:	TNFR		

The main comparison table has the following structure:

Description	Simulation	Testing	Error
Pane Thickness #1	0.125	0.125	<input type="checkbox"/>
Pane Thickness #2	0.125	0.135	<input type="checkbox"/>
Pane Thickness #3			<input type="checkbox"/>
Pane Thickness #4			<input type="checkbox"/>
Pane Thickness #5			<input type="checkbox"/>
Pane Thickness #6			<input type="checkbox"/>
Pane Thickness #7			<input type="checkbox"/>
Pane Thickness #8			<input type="checkbox"/>
Gap 1	0.5	0.500	<input type="checkbox"/>
Gap 2			<input type="checkbox"/>
Gap 3			<input type="checkbox"/>
Gap 4			<input type="checkbox"/>
Gap 5			<input type="checkbox"/>
Gap 6			<input type="checkbox"/>
Gap 7			<input type="checkbox"/>
Gap Fill 1	ARG	ARG	<input type="checkbox"/>
Gap Fill 2			<input type="checkbox"/>
Gap Fill 3			<input type="checkbox"/>
Gap Fill 4			<input type="checkbox"/>
Gap Fill 5			<input type="checkbox"/>
Gap Fill 6			<input type="checkbox"/>
Gap Fill 7			<input type="checkbox"/>
% of Gap Fill 1	95	95	<input type="checkbox"/>
% of Gap Fill 2			<input type="checkbox"/>

Additional parameters are listed in a separate table:

Description	Simulation	Testing	Error
% of Gap Fill 3			<input type="checkbox"/>
% of Gap Fill 4			<input type="checkbox"/>
% of Gap Fill 5			<input type="checkbox"/>
% of Gap Fill 6			<input type="checkbox"/>
% of Gap Fill 7			<input type="checkbox"/>
Emissivity Surface 1			<input type="checkbox"/>
Emissivity Surface 2	0.022	0.022	<input type="checkbox"/>
Emissivity Surface 3			<input type="checkbox"/>
Emissivity Surface 4			<input type="checkbox"/>
Emissivity Surface 5			<input type="checkbox"/>
Emissivity Surface 6			<input type="checkbox"/>
Emissivity Surface 7			<input type="checkbox"/>
Emissivity Surface 8			<input type="checkbox"/>
Emissivity Surface 9			<input type="checkbox"/>
Emissivity Surface 10			<input type="checkbox"/>
Emissivity Surface 11			<input type="checkbox"/>
Emissivity Surface 12			<input type="checkbox"/>
Emissivity Surface 13			<input type="checkbox"/>
Emissivity Surface 14			<input type="checkbox"/>
Emissivity Surface 15			<input type="checkbox"/>
Emissivity Surface 16			<input type="checkbox"/>
Tint	LE	LE	<input type="checkbox"/>
Shading System			<input type="checkbox"/>
Spacer	A1-S	PU-D	<input type="checkbox"/>

Other parameters on the right include: Grid Type (N), Grid Size, Frame Emissivity (0.9), Frame Absorptance (0.3), Frame Type (VY), Sash Type (VY), Door Description, Door Core Fill, Door Skin Material, Door Substructure (Edge), Door Panel Material, U-factor (0.35), and Size (1200mm x 1500mm). An 'Add Comment' button is located below the U-factor and Size rows.

At the bottom of the page, there are two buttons: 'Accept Validation' and 'Verification Failed'. Below these buttons is a checkbox with the text: 'By checking this box I verify that the simulation and test uploads are correct and that I wish to generate a Product Line.'

Figure 10.7: View of Headers on Comparison Page

SIMULATION SUMMARY		TESTING SUMMARY	
Series / Model:	Initial Upload	Series / Model:	Initial Validation
Product Type:	HSXX	Product Type:	HSXX
Sim Report #:	Initial Report #	Test Report #:	Initial Validation Test
Test Date:	5/1/2009	Test Date:	5/1/2009
Sim Lab:	SNFR	Test Lab:	TNFR

10.2.2 Proceed Elsewhere in the CPD

The IA can take no action by exiting the validation comparison page using two methods:

1. Select the “Back” button, which will bring the IA to the previous Validation Coordination page. The IA cannot edit either report since the files are now “linked.”
2. Select one of the gray tabs at the top of the screen.

10.2.3 Add a Comment

The IA can save a comment per Section 9.1.1.

Figure 10.8: Detailed view of Comment field and message in comparison page

Figure 10.9: Detailed view of Comment field and message in comparison page

Add Comment		
Comment	Creator	Date
First review by IA on validation comparison page - labs need to verify the size and frame and sash types.	shanlon-ia	12/22/2007 11:50:17 PM

10.2.4 Verification of the Validation Failed

By utilizing the “Verification Failed” button in conjunction with the Comment field to list the issues or checked Error boxes the IA can notify the labs via automatic emails that the product line does not validate. After selecting the Verification Failed button, the IA Home

page will appear. An automatic email will be sent to the lab(s) and the IA associated with the reports referenced on the validation page.

10.2.4.1 Failure not due to the data or codes

The validation failure does not have to be based on the data or codes listed on the validation comparison screen, but can be other issues related to problems in the actual reports.

10.2.4.2 Failure due to the data or codes

If the validation failure is based on data or codes listed, the IA can select an error box next to the corresponding error which remains selected for corrections. When the labs review the Validation Comparison page after receiving the email notification, any box selected by the IA will be checked and highlighted for their reference.

NOTE: If the IA utilizes the notification tools at the validation comparison screen and has not rejected either of the laboratories' spreadsheets, the lab is not required to re-upload a new spreadsheet. The modifications by the laboratory are sufficient and the IA may proceed with certification if all necessary changes are completed. The laboratories' are required to re-submit a new report and spreadsheet to the IA outside the CPD environment (i.e., email)

Figure 10.10: View of Boxes Checked by IA

Description	Simulation	Testing	Error
Grid Type	N	N	<input type="checkbox"/>
Grid Size			<input type="checkbox"/>
Frame Emissivity	0.9	0.9	<input type="checkbox"/>
Frame Absorptance	0.3	0.3	<input type="checkbox"/>
Frame Type	vy, va	vy	<input checked="" type="checkbox"/>
Sash Type	vi, va	vy	<input checked="" type="checkbox"/>
Door Description			<input type="checkbox"/>
Door Core Fill			<input type="checkbox"/>
Door Skin Material			<input type="checkbox"/>
Door Substructure (Edge)			<input type="checkbox"/>
Door Panel Material			<input type="checkbox"/>
U-factor	0.35	0.350	<input type="checkbox"/>
Size	1250mm x 1550mm	1200mm x 1500mm	<input checked="" type="checkbox"/>

Figure 10.11: View of Highlighted Boxes when Lab Visits page

Description	Simulation	Testing	Error
Grid Type	N	N	<input type="checkbox"/>
Grid Size	-	-	<input type="checkbox"/>
Frame Emissivity	0.9	0.9	<input type="checkbox"/>
Frame Absorptance	0.3	0.3	<input type="checkbox"/>
Frame Type	vy, va	vy	<input checked="" type="checkbox"/>
Sash Type	vi, va	vy	<input checked="" type="checkbox"/>
Door Description	-	-	<input type="checkbox"/>
Door Core Fill	-	-	<input type="checkbox"/>
Door Skin Material	-	-	<input type="checkbox"/>
Door Substructure (Edge)	-	-	<input type="checkbox"/>
Door Panel Material	-	-	<input type="checkbox"/>
U-factor	0.35	0.350	<input type="checkbox"/>
Size	1250mm x 1550mm	1200mm x 1500mm	<input checked="" type="checkbox"/>

10.2.5 Accepting Validations

In case of a validation issue failure, the labs will visit the Validation Comparison page and make any necessary modifications. The Validation Comparison page allows the Labs to edit each cell individually so that the product's information matches. The labs will then select a Notify IA button, in which the IA will receive an email notification containing a hyperlink directing the IA to the corresponding validation page. The modifications will only be changed on this Validation Comparison page and not in the Report Detail pages. If any report changes to the validation option are necessary, the lab will only need to forward a new report to the Manufacturer and IA. If a change to the data within the upload and on the Report Details page is necessary, both reports would be rejected by the IA and will have to be uploaded again and matched for validation.

The IA can access the validation comparison page per methods listed in Section 10.2.1.

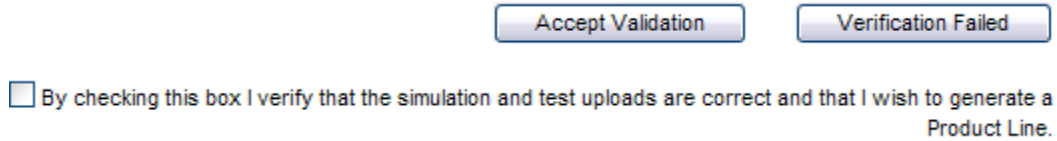
After confirming that all data is correct, which includes, but is not limited to, reviewing the reports versus the codes listed as well as the data, the IA can accept the validation by using one of two options.

10.2.5.1 Manually Accepting Spreadsheets and Validation

If the IA chooses to follow the method of reviewing and accepting the simulation and test upload spreadsheet manually, proceeding with this method will conclude one of the three requirements to generate a product line.

Select the Accept Validation button without selecting the streamlined process box.

Figure 10.12: View of “Accept Validation” without streamline process



10.2.5.2 Accepting All Spreadsheets and Validation

If the IA chooses to follow the method of accepting the simulation and test upload spreadsheet at the validation comparison screen, proceeding with this method will conclude all the requirements to generate a product line.

Select the check box indicating that the IA will accept the simulation and test upload spreadsheet, accepts the validation, and wishes to generate a product line; then select the Accept Validation button. **NOTE: The IA shall start at the simulation spreadsheet to utilize this process.**

Figure 10.13: View of “Accept Validation” with streamline process

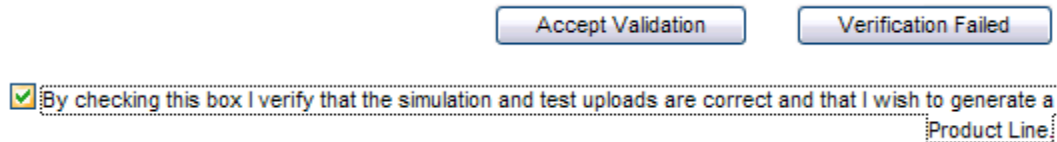


Figure 10.14: View of Comments Added by Labs

Add Comment		
Comment	Creator	Date
Test lab to modify frame / sash type	shanlon-tlab	12/23/2007 2:10:36 AM
Simulation lab modified the Size and Frame / Sash Type	shanlon	12/23/2007 12:54:20 AM
First review by IA on validation comparison page - labs need to verify the size and frame and sash types.	shanlon-ia	12/22/2007 11:50:17 PM

Figure 10.15: View of Data / Codes Fields Edited by Labs

Frame Type	va	va	<input checked="" type="checkbox"/>
Sash Type	va	va	<input checked="" type="checkbox"/>
Door Description	-	-	<input type="checkbox"/>
Door Core Fill	-	-	<input type="checkbox"/>
Door Skin Material	-	-	<input type="checkbox"/>
Door Substructure (Edge)	-	-	<input type="checkbox"/>
Door Panel Material	-	-	<input type="checkbox"/>
U-factor	0.35	0.350	<input type="checkbox"/>
Size	1200mm x 1500mm	1200mm x 1500mm	<input checked="" type="checkbox"/>

10.3 Validation of CPD 1.0 Upload Spreadsheet

CPD 1.0 uploads do not go through the CPD 2.0 validation process. The CPD will verify the upload type, whether CPD 1.0 or CPD 2.0.

Figure 10.16: Simulation Report Detail Screen for CPD 1.0 Upload

GENERAL INFORMATION		PRODUCT-LINE INFORMATION		COMMENTS
Report Type:	New	CPD Number:	N/A	<input type="button" value=" Add Comment"/>
Revision Date:	8/15/2008	Model / Series:	Metal Clad Awning	
Mfr Name:	Paramount Windows Inc.	Operator Type:	PRAW	
Lab Code:	SATM	Thermal Break Type:	N	
IA Code:	K	2004 Model Size:	1500mm x 600mm	
Uploaded By:	ASAROUFIEM	Rating Procedure:	2004	
Upload Date:	8/22/2008	Report Number:	85379.01-201-45-R0	

File Version	
Report Type:	CPD 1.0

A CPD 1.0 will have an “Enter Validation” button on the screen.

Figure 10.17: View of Enter Validation button

GENERAL INFORMATION		PRODUCT-LINE INFORMATION	
Report Type:	New	CPD Number:	
Revision Date:	8/13/2008	Model / Series:	
Mfr Name:	Cascadia Windows Ltd.	Operator Type:	
Lab Code:	SEEL	Thermal Break Type:	
IA Code:	K	2004 Model Size:	
Uploaded By:	MHANAM	Rating Procedure:	
Upload Date:	8/21/2008	Report Number:	

File Version	
Report Type:	CPD 1.0

The IA can click on the button and enter the validation information and click the Save Validation button.

Figure 10.18: View of Enter Validation Screen

TEST VALIDATE	
Test Lab Code:	<input type="text"/>
Standard U-Factor:	<input type="text"/>
Size:	<input type="text"/>
Test Date:	<input type="text"/>
Report Revision Date:	<input type="text"/>
Report Recieved Date:	<input type="text"/>
Report Number:	<input type="text"/>

If the IA attempts to generate a product line prior to filling in the validation information, the IA will receive an error.

Figure 10.19: View of Validation Error

GENERAL INFORMATION	PRODUCT-LINE INFORMATION
Report Type: New	CPD Number:
Revision Date: 6/25/2008	Model / Series:
Mfr Name: Century Specialty Windows	Operator Type:
Lab Code: SATI	Thermal Break Type:
IA Code: K	2004 Model Size:
Uploaded By: JDESCHEEM	Rating Procedure:
Upload Date: 6/25/2008	Report Number:

File Version
Report Type: CPD 1.0

Must validate grouping before this Line can be published.

Figure 10.20: A CPD 1.0 upload spreadsheet will utilize the same Grouping Validation process as stated in section 9.1.6.

< Back Accept Reject Enter Validation Group Validation

GENERAL INFORMATION		PRODUCT-LINE INFORM.	
Report Type:	New	CPD Number:	
Revision Date:	8/13/2008	Model / Series:	
Mfr Name:	Cascadia Windows Ltd.	Operator Type:	
Lab Code:	SEEL	Thermal Break Type:	
IA Code:	K	2004 Model Size:	
Uploaded By:	MHANAM	Rating Procedure:	
Upload Date:	8/21/2008	Report Number:	

File Version	
Report Type:	CPD 1.0