

Introduction to the Ecosystem Services Registry

for Certification Bodies Admins

Introduction

Purpose of the Document

This manual is intended to serve as an essential reference for Certification Body (CB) Admins responsible for managing auditors and auditing assignments within the Ecosystem Service Impact Registry. It provides step-by-step instructions and contextual information to help CB Admins navigate the system, perform their core tasks efficiently, and ensure accurate documentation and oversight of auditors and assignments. By following this guide, CB Admins will gain a clear understanding of how to access, configure, and make the most of the dashboard's functionalities, thereby enhancing workflow and compliance within their certifying body.

Overview of the Registry

The Ecosystem Service Impact Registry is a secure, centralized digital platform designed for the streamlined management of certification-related information.

As a CB Admin, you can use the registry to view, add, edit, and remove auditors tied to your certifying body, as well as assign auditors and approvers to Ecosystem Service Requests (ESRs).

The registry's real-time updates, intuitive dashboard, and dynamic lists support transparent and efficient administration, ensuring that all relevant information is accessible and up to date. Its compatibility with modern operating systems and browsers guarantees a seamless experience across different devices.

Why Use This Registry?

Leveraging the Ecosystem Service Impact Registry offers several distinct advantages. It centralizes auditor and assignment management, reducing manual record-keeping

and the potential for errors. The system's user-friendly interface and robust search, filter, and audit trail features empower CB Admins to quickly complete their tasks and maintain oversight. Real-time updates and secure access controls help ensure that only authorized personnel manage sensitive data, while the registry's integration with the FSC System streamlines account setup and access. Ultimately, using this registry enhances productivity, accountability, and the overall integrity of the certification process.

Getting Started

System Requirements

To effectively use the Ecosystem Service Impact Registry, ensure that your hardware and software meet the following minimum requirements:

Hardware

- Computer or tablet with a dual-core processor.
- Minimum 4GB of RAM for optimal performance.
- Stable internet connection with at least 2 Mbps bandwidth.

Software

- **Operating System:** Compatible with Windows 10 or later, macOS High Sierra (10.13) or later, or the latest version of iOS/Android.
- **Web Browser:** Latest versions of Chrome, Firefox, Safari, or Microsoft Edge with JavaScript enabled.

Accessing the Registry

A CB Admin needs to exist in the FSC system to use our registry. Please contact the FSC to create a CB Admin account to access the Registry. You should be listed as a primary contact for a CB in the FSC Dynamics System to get CB Admin access.

Login Procedures:

- **Open Browser/Application:** Launch your preferred web browser or the installed application if applicable.
- **Navigate to Login Page:** Visit the official website - <https://connect.fsc.org/>

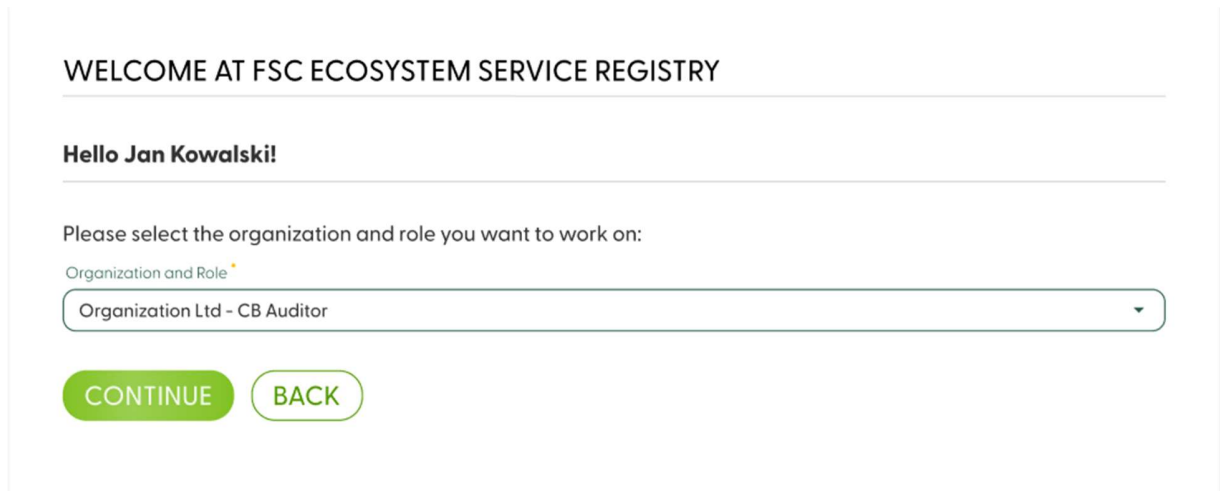
- Goto Home page and select the "Login" option to access the system.
- Enter Credentials: Type in your username and password in the designated fields.
- Security Verification: Complete any verification steps
- Log In: Click on the "Login" button to access the system.

Select your Organization, Role and License Code:

Once logged in, you will be directed to a selection screen. Here, you need to:

- **Choose Your Organization:** Select the organization you are associated with.
- **Define Your Role:** Specify your role within the organization.
- **Select a License Code:** Pick the license code relevant to your work or project.

Completing these steps ensures that you are working in the correct context and accessing the appropriate resources within the registry system.



WELCOME AT FSC ECOSYSTEM SERVICE REGISTRY

Hello Jan Kowalski!

Please select the organization and role you want to work on:

Organization and Role *

Organization Ltd - CB Auditor

CONTINUE BACK

Managing your Certifying Body

CB Admin Overview

Upon successful login and completion of organizational, role, and license code selection, the CB Admin is directed to their personalized dashboard to view Auditors

which are part of their CB. The dashboard serves as the central hub for managing certifying body auditors and provides immediate access to essential information and actions. Its intuitive layout is designed to enhance productivity and transparency for Certification Body Admins.

Dashboard Structure and Key Features

The CB Admin functionalities are divided into two distinct sections to streamline workflow and provide clarity. The most prominent feature upon entry is the display of two primary lists:

- **Auditors List:** This section presents a comprehensive list of all auditors currently associated with the certifying body. Each entry includes key details such as auditor name, status (active/inactive), assigned audits, and contact information. Admins can easily monitor auditor assignments and initiate actions such as adding, editing, or removing auditors directly from this interface.
- **Assignments List:** The second list highlights pending actions requiring CB Admin attention, such as assigning Auditors and Approvers to ESRs.

Both lists are dynamic, updating in real time to reflect the latest changes within the system. The dashboard functionality is tailored to provide at-a-glance overviews, while also allowing the admin to drill down into detailed records or initiate workflows as needed.

CB Admin Dashboard - Auditors

Navigation and Interaction

CB Admins can reach the dashboard from anywhere the tab on the top right corner – CB Admin Panel and CB – ES Registry.

The CB Admin Dashboard provides a robust toolkit for managing auditors and their assignments within your certifying body. This section details the fields visible to CB Admins, along with essential search, filter, edit, and creation capabilities.

AUDITORS

Show only auditors without assignment ☐

Name

Home Country

Can view All ESRs

Email

ESR Assigned

APPLY FILTERS

Search

NAME	COUNTRY	EMAIL	ESR ASSIGNED	PREASSIGNED FMs	CAN VIEW ALL ESRs	START DATE	END DATE	
Krystian Reinke	Sweden	k.reinke@fsc.org	6	Jacek Placek, Maciej Mijas, Rashi Goyal PWC	Yes	4/25/2025	6/26/2025	<input type="button" value="v"/>
Slawomir Kreft	Poland	s.kreft@fsc.org			No	5/23/2025	6/7/2025	<input type="button" value="v"/>
Damian Surlicki	Poland	d.surlicki@fsc.org	3	Jacek Placek	Yes	4/6/2025		<input type="button" value="v"/>

CREATE NEW AUDITOR

Viewable Fields

Within the Auditors List, CB Admins can view the following information for each auditor:

- **Name:** The full name of the auditor for identification.
- **Country:** The home country of the auditor.
- **Number of ESRs Assigned:** Displays how many ESRs are currently assigned to the auditor as either an auditor or an approver, supporting workload tracking and balancing.
- **Email:** Contact email address for direct communication.
- **Preassigned FMs:** Shows any Forest Management units preassigned to the auditor, whose ESRs will be directly assigned to an Auditor for Audit. This will aid in planning and oversight.
- **Can View All ESRs:** Indicates whether the auditor has permission to view all ESRs associated with the certifying body. If the auditor does not have this permission, then they can only see those ESRs on their dashboard that have been assigned to them.
- **Start Date:** The date the auditor's assignment started, useful for tracking tenure and compliance.

- **Expiry Date:** The date the assignment is set to expire. **Note:** There is an option to leave this field blank if no expiry date is required.

Filtering and Search Capabilities

CB Admins can refine the Auditor List using a set of intuitive filters and a search function:

- **Name:** Filter or search using the Auditor Name for precise results.
- **Email:** Filter auditors by email address.
- **Country:** Filter by the auditor's home country
- **ESRs Assigned:** Filter based on the number of ESRs assigned to each auditor, helping identify auditors with high or low workloads.
- **Can View All ESRs:** Filter based on whether auditors have full ESR viewing permissions.
- **Without Assignment:** Apply a filter to show only auditors who are not currently assigned to any ESRs.

Additionally, the dashboard supports a robust search option, enabling CB Admins to find any auditor by entering their full name into the search field.

Auditor Management Actions

- **Edit Auditor:** CB Admins may edit details for any auditor. Select the auditor from the list and use the "Edit" option to update their information, assignment, or permissions as needed.
- **Create New Auditor:** To add a new auditor, use the "Create New Auditor" function. Enter the required details, assign relevant permissions, and complete the setup to add the individual to your CB's roster.

These tools ensure that CB Admins can keep auditor records accurate and up to date, respond rapidly to changes in staff, and maintain a clear overview of assignments and permissions at all times.

Step-by-Step Guide: Creating a New Auditor

To add a new auditor to your Certification Body, follow these instructions for a seamless onboarding process:

- **Access the Create New Auditor Function:** On the CB Admin Dashboard, locate and click the **Create New Auditor** button. This action will open the interface for adding auditors.
- **Review Eligible Auditors:** A list of users who have Auditor access within the Registry will be displayed. Browse through this list to find the individual you wish to add.

FIRST NAME (CONTACT)	LAST NAME (CONTACT)	ACTIVE AUDITOR	
Rashi	Goyal PWC	No	Edit

SUBMIT

- **Select and Edit Auditor Details:** Choose the desired auditor from the list and click the **Edit** button. Here, you can review and update the auditor's information, including contact details, permissions, and assignments.
- **Activate and Submit:** Ensure the auditor is marked as **Active**. Once all required fields are reviewed and updated, click **Submit** to confirm the addition

ACTIVATE

Activate user?

Active Auditor
☒ No ☐ Yes

SUBMIT

- **Verify Addition:** Return to the dashboard. The newly added auditor should now appear in your Auditors List, fully set up and ready for assignment.

Edit Auditor Details

As a CB Admin, you have the ability to edit and update auditor records to ensure accuracy and effective assignment management. This guide walks you through the process of editing an auditor's details, aligned with current system requirements and user stories.

Accessing the Edit Auditor Function

- Navigate to the **CB Admin Dashboard** from the top-right menu bar by selecting “CB Admin Panel” or “CB – ES Registry.”
- In the Auditors List, locate the auditor you wish to update using the search or filter options (by Name, Email, Country, etc.).
- Select the desired auditor and click the **Edit Auditor** button to open the editing interface.

Editable Fields and Assignment Settings

When editing an auditor’s profile, you can update the following fields.

- **Name:** Check the full name of the auditor. This field is read only
- **Country:** Check the auditor’s home country
- **Email:** Check the contact email address. This acts as a unique identifier for the auditor. This field is read only.

AUDITOR INFORMATION

Personal Information

Auditor Name *

Krystian Reinke

Auditor Data

Email

k.reinke@fsc.org

Country

Add or Remove Auditor from CB

☐ No ☒ Yes

- **Add or Remove Auditor from CB:** Select No to remove Auditor from CB. You can add them back by clicking on the ‘Create New Auditor’ Button on the Dashboard.
- **Engagement Time:** Optionally, specify the engagement time for the auditor (if tracked by your organization).
- **Start Date and Time:** Enter or select the date and time when the auditor’s assignment begins. This field is required.

- **Expiry Date and Time:** Enter or select the expiration date and time for the assignment or leave this field blank if no expiry is required.

Engagement Time

Start Date and Time
4/25/2025

Expiry Date and Time
6/26/2025

☐ No Expiry Date

Assignment Settings

- **Preassigned Forest Managers (FMs):**
 - Click on Predefine FM button
 - Select from the list of available FMs.
 - Once the FM is selected, the corresponding FM Name will be displayed in read-only mode for confirmation

Assignment Settings

Please select Forest Managers that should be preassigned to this Auditor. The Auditor will automatically receive ESRs submitted by those FMs.

				PREDEFINE FM
FULL NAME (CONTACT)	CONTACT	AUDITOR	CREATED ON	
Jacek Placek	Jacek Placek	Krystian Reinke	6/11/2025 5:57 P	Delete ▼
Maciej Mijas	Maciej Mijas	Krystian Reinke	6/18/2025 5:01 PM	▼
Rashi Goyal PWC	Rashi Goyal PWC	Krystian Reinke	6/18/2025 7:25 PM	▼

Grant a permission to view:
☐ No ☒ Yes

SUBMIT

Create

×

 This site is private: Only specific people can view this site. [Learn more](#)

Signed in as Rashi Goyal PWC

PRE ASSIGN FOREST MANAGER

Contact

Select

Select

Rashi Goyal PWC

Damian Surlicki


Krystian Reinke

- **Grant Permission to View ESRs:**

- Select **All ESRs** if the auditor should have access to every ESR associated with the certifying body.
- Select **Only the Assigned ESRs** if the auditor should only see ESRs specifically assigned to them.
- This is a mandatory radio button selection.

CB Admin Dashboard – Assignments

The Assignments Dashboard is a tool designed for Certification Body (CB) Administrators to manage, track, and optimize the engagement of auditors and Forest Managers (FMs) for ESRs. This guide provides detailed instructions on all functionalities related to assignments, including viewing, filtering, searching, and editing, as well as descriptions of ESR statuses and their visibility.

 FSC Ecosystem Services Registry

Home | CB Admin Panel | CB - ES Registry | CB Auditor - ES Registry | 🔍 | Rashi Goyal PWC -

AUDITOR ASSIGNMENT

Search..... 🔍

Show items pending assignment ☐

FM Home Country

▼

Impact

▼

Auditor

▼

ESR ID

▼

Status

▼

APPLY FILTERS

FOREST MANAGER	FM LICENSE CODE	FM HOME COUNTRY	ESR REQUEST REQUEST ↓	IMPACT	STATUS	ESR SUBMIT DATE	AUDITOR	APPROVER	
Texas Certification Group managed by Morris Timber Holdings, Inc.	FSC-C110096	UNITED STATES	ESR-000278	# Portals-FSC	Submitted	6/18/2025 3:48 PM	Rashi Goyal PWC		▼
Texas Certification Group managed by Morris Timber Holdings, Inc.	FSC-C110096	UNITED STATES	ESR-000212	• ES2.5	Submitted	5/16/2025 5:53 PM	Rashi Goyal PWC	Krystian Reinke	▼
Texas Certification Group managed by Morris Timber Holdings, Inc.	FSC-C110096	UNITED STATES	ESR-000193	• ES5.1	Audited	5/22/2025 3:04 PM	Rashi Goyal PWC	Damian Surlicki	▼

Key Features of the Assignments Dashboard

- **View Assigned and Unassigned ESRs:** CB Admins can access a consolidated list of all ESRs under their Certification Body—both those already assigned to auditors and those pending assignments.
 - **Assigned ESRs:** You can see if an ESRs is unassigned by clicking on the filter – Show items pending assignment or by seeing the blank space under auditor or approver name.

- **Unassigned ESRs:** These ESRs do not have any Auditor or Approver assigned.
- **Comprehensive Data Display:** Each ESR entry displays the following essential information:
 - **Forest Manager:** Name of the FM associated with the ESR.
 - **FM License Code:** The license identification code for the FM.
 - **FM Home Country:** The country of origin of FM.
 - **ESR Request:** The unique identifier or title of the ESR.
 - **Impact:** The Ecosystem Services Impacts captured in ESR
 - **Status:** The status of the ESR (see “Relevant ESR Statuses” below).
 - **Auditor:** Name of the auditor assigned to the ESR, if applicable.
 - **Approver:** Name of the approver assigned to the ESR, if applicable.
 - **ESR Submission Date:** The date on which the ESR was submitted to the CB.
- **Filtering and Search Capabilities:** Advanced filters allow CB Admins to rapidly narrow down ESRs, and assignments based on relevant criteria, streamlining daily workflows.
 - **Show items pending assignment:** Filter the dashboard to display only ESRs currently unassigned to auditors, accelerating identification and action for outstanding assignments.
 - **FM Home Country:** Narrow results based on the country of origin of the Forest Manager (FM), aiding regional oversight and reporting.
 - **Impact:** Filter ESRs by the specific Ecosystem Services Impact recorded, making it easier to focus on relevant cases.
 - **Auditor:** Display ESRs assigned to specific auditors, supporting workload balancing and tracking.
 - **ESR ID:** Search and filter ESRs by their unique identifier or request title.
 - **Status:** Filter ESRs according to their current workflow status to prioritize tasks or monitor progress.
- **Action Buttons for Efficient Workflow:**

- **Apply Filters:** After selecting desired filter criteria, use this button to update the display and quickly locate relevant ESRs.
- **View Item Details:** Click this action button to access the ESR in read only mode and see the current status of the ESR.
- **Assignment and Editing Functionality:** CB Admins can both view and modify existing assignments, ensuring that the right auditor is paired with each ESR and that records remain current.

These improvements are designed to ensure CB Admins can quickly filter, locate, and act on ESR assignments, with clear data points and streamlined controls for managing auditor engagement.

Viewing ESR Details

CB Admins can click '**View Item Details**' on any ESR entry to view its comprehensive details. This includes all information submitted by the Forest Manager, documentation, status history, and any attached reports.

Show / Hide Approval Status

i
This item is under a process of approval.

1
SUBMITTED

2
AUDITED

3
APPROVED

Some additional information regarding the current step and the possibilities of such an item, depending on the viewer role and what does it mean for the potential sponsors or who else may be concerned.

STATUS

Approved

SUBMIT DATE
4/29/2025 9:20:10 AM

AGING

56 days

Show / Hide Comments

Step 8 of 8

0% Completed

STATEMENT OF RESULTS

i This item is under a process of approval.

Assignments are not static; CB Admins can edit them as needed. This includes:

- Adding and Changing the assigned Auditor (e.g., in case of staff changes or workload balancing).
- Adding and Changing the assigned Approver
- Ensuring all records remain accurate and up to date in response to organizational changes.

To edit an assignment, select the ESR, click "Edit Assignment," make the required adjustments, and save your changes. The dashboard immediately reflects all updates.

AUDITOR ASSIGNMENT

ESR--000134

Texas Certification Group managed by Morris Timber Holdings, Inc.

Please choose an Auditor.

Krystian Reinke



Please choose an Approver.

Damian Surlicki



SUBMIT

Lookup records

Search

Choose one record and click Select to continue

	CONTACT	EMAIL (CONTACT)	NAME	COUNTRY	ESR ASSIGNED
<input checked="" type="checkbox"/>	Krystian Reinke	k.reinke@fsc.org	Krystian Reinke	Sweden	6
<input type="checkbox"/>	Rashi Goyal PWC	r.goyal@fsc.org	Rashi Goyal	India	8
<input type="checkbox"/>	Slawomir Kreft	s.kreft@fsc.org	Slawomir Kreft	poland	
<input type="checkbox"/>	Damian Surlicki	d.surlicki@fsc.org	Damian Surlicki	Poland	3

SELECT

CANCEL

REMOVE VALUE

Assignment Statuses and Visibility

Understanding the lifecycle of an ESR is crucial for effective dashboard management. The system supports the following statuses, each with defined role visibility and process implications:

Status	Description
Draft	ESR creation or update in progress. Not visible to CB Admin until submitted.
Submitted	ESR has been submitted by FM to the CB organization. Visible to CB Admins and relevant auditors.
Audited	CB Auditor has attached the DAR and completed the audit process.
Approved	CB Approver has approved the ESR.
On hold	CB Approver denied approval; ESR is editable for up to 90 days.
Dropped	CB Admin denied approval and ESR has remained unchanged for more than 90 days. ESR is deleted from the system.

Best Practices for Dashboard Management

- Regularly review **unassigned ESRs** to ensure prompt allocation of auditors and avoid project bottlenecks.

- Leverage advanced filters for Impact, Status, and Auditor Name to efficiently manage assignments by specialty, process stage, and staff capacity.
- Make use of the search bar to find assignments by FM Name or ESR Request for rapid access to crucial records.
- Stay informed about upcoming enhancements to maximize dashboard utility as new features are deployed.

Troubleshooting and Support

- If you are unable to locate an ESR or assignment, ensure all filters are cleared and search again.
- For issues with the fields, consult release notes or contact the system support team for updates on development progress.
- For further assistance, please reach out to your organization's designated support contact.

Conclusion

The Assignments Dashboard equips CB Admins with a comprehensive, flexible interface to manage the full lifecycle of ESR assignments. With advanced filtering, detailed record access, and the ability to both edit and review assignments, CB Admins can ensure that projects proceed smoothly and efficiently, supporting both auditors and Forest Managers in the delivery of high-quality ecosystem services.