

Document Title: Official Implementation and User Guide: CB Automation

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1. INTRODUCTION & LIABILITY Welcome to CB Automation, the premier enterprise compliance engine for Certification Bodies. This software provides automated document generation, surveillance tracking, and direct API integration with the IAF CertSearch database. *Important Notice:* By installing this self-hosted software, the Client assumes full responsibility for their server environment, data security, and the legal validity of the certificates generated.

2. SYSTEM REQUIREMENTS

Operating System:

Linux (Ubuntu/CentOS recommended) or Windows (XAMPP).

Web Server:

Apache or Nginx.

PHP Version:

8.2 or 8.4.

Database:

MariaDB 10.4+ or MySQL 8.0+.

Required PHP Extensions:

mysqli, curl, gd, zip, mbstring.

Tools:

Composer (for dependency management).

3. DEPLOYMENT & INSTALLATION (Self-Hosted)

Step 3.1: File Extraction Upload the provided `cb_automation.zip` archive to your web server's document root (e.g., `/var/www/html/cb`). Extract the contents.

Step 3.2: Permissions The application requires write access to generate documents, QR codes, and logs. Run the following commands via SSH: `chmod -R 775 /uploads/qr_codes` `chmod -R 775 /uploads/signatures` `chmod -R 775 /uploads/temp` `chmod -R 775 /uploads/temp_zip`

Step 3.3: Dependency Installation Navigate to the root directory and execute Composer to install the required libraries (PhpWord, PhpSpreadsheet, PHPMailer, etc.): `composer install --no-dev`

Step 3.4: Database Configuration Create a new blank database. Import the provided `consul15_cb.sql` file. Open `/config/db.php` and update the `DB_HOST`, `DB_USERNAME`, `DB_PASSWORD`, and `DB_NAME` constants with your credentials.

4. AUTOMATION & CRON JOBS To utilize the automated surveillance alerts and IAF syncing, you must configure a daily cron job. Add the following to your server's crontab (crontab -e): 0 1 * * * /bin/bash /path/to/your/app/scripts/daily_tasks.sh >> /var/log/cb_cron.log 2>&1

5. WHITE-LABEL CONFIGURATION

Log into the system using the default Super Admin credentials (provided securely upon purchase).

Navigate to **Admin Dashboard -> Settings**.

Update the "Company Name", "EDRPOU", and "Banking Details".

Upload your Accreditation Body logo (e.g., NAAU) in the **Theme** section to ensure it appears on generated certificates.

6. IAF CERTSEARCH API INTEGRATION

To activate the 1-Click IAF Sync:

Obtain your official API Key from the IAF CertSearch portal.

Navigate to /includes/cb_cert_functions.php (or the Admin Settings UI) and insert your IAF_API_KEY.

Certificates marked as "Active" will now be queued for bulk upload via the IAF Report module.

7. SUPPORT & CUSTOMIZATION The core license does not include server administration. If you require professional installation, server hosting, or custom template engineering, please contact our support team at **support@consulting-ua.eu** to purchase a deployment package.

8. NOTE: By default the System comes with an integrated AI (Artificial intelligence) module that allows the auditor to scan a given Company Certificate and populate automatically the data, when registering a new user/client. Also, by default, upon creation of the user, to avoid conflicting with existing registered users, the system generates a fake email address for the client, email that later can be altered/ changed when accessing "Manage Clients" (admin/users.php) page. We strongly advice, after installing the App, to configure a new AI (free) with Google Cloud Vision AI and replace the settings for the API Key (\$apiKey = '.....') both in admin/ajax_scan_document.php and in scan_document.php (\$google_api_key = '.....') as the existing key will be canceled upon testing the system. Also make sure that /vendor folder is installed (copied) as such from the installation kit one folder above the main App (ex: if you installed with the default settings in /var/www/html (for Unix systems) and App's folder is /var/www/html/cb, then vendor folder must be /var/www/html/vendor).