eTrade Document Exchange (eTDE) System
Basic User Guide

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Accessing and Using the eTDE Website for Basic Users

This Basic User Guide will cover only those topics for a user to access the system and view documents that have been uploaded to eTDE. It will not cover topics on providing or managing access to documents. The appropriate guideline should be referenced for users with authority to perform those functions (Provider User Guide, Owner User Guide, and/or Administrators Guide).

This document will show the actual eTDE Graphical User Interface (GUI) and provides step-by-step instructions for how users will interact with each screen. The eTDE System can be accessed on the internet at http://www.etde.usda.gov .

Note: Users may have to disable pop ups in order to prevent "linkage not found" errors while navigating the eTDE system. If pop ups are allowed and a survey request appear, respond 'NO' to the request. If 'page not found' error occurs simply refresh page.

Internet Explorer version 8 is the current compatible browser for eTDE. Other versions of Internet Explorer may be used but may require selection of compatibility view from the Tools menu.

Note: eTDE registration is required for use of the eDocs module. eDocs is an application system for the creation of export documents that flows directly into eTDE.

1. Registering for eTDE Access

There are two types of registration that must be completed, (1) eAuthentication and (2) eTDE registration. First you must have an eAuthentication account in order to access USDA websites. Once you have an eAuthentication account then you must register for access to eTDE. The steps below explain how to do both types of registrations.

1.1. Applying for eAuthentication Account

Navigate to www.etde.usda.gov. eAuthentication is the first step in the process of registering for eTDE. If you are not already registered with eAuthentication select the eAuthentication link on the welcome page (Figure 1).

Figure 1

Users that are not yet registered for eTDE will be taken to the eAuthentication home page. **Follow instructions on this site to register as a Level 2 user if your company is located in the United States or Canada. Follow Level 1 instructions if your company is located outside of the U.S. or Canada.**

Please note that eAuthentication registration does not register you with eTDE. Registering with eTDE is a separate activity that will follow in Section 1.2.

1.1.1. Level Two Account Registration

    1.1.1.1.   Navigate to Level 1 or 2 from the eTDE home page as instructed in section 1.1 above. Registrants MUST use your personal address for this initial registration (Figure 2) since your address must match your ID, which you will present to a USDA Service Center in the next step. Please note that you must first register as an individual through the eAuthentication process before you can be associated with your company in eTDE.

Figure 2

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1.1.1.2. Once you have completed the online application for a Level 2 eAuthentication account, you must physically go to a [Local](http://offices.sc.egov.usda.gov/locator/app) Registration Authority (LRA) (http://offices.sc.egov.usda.gov/locator/app) with a current State Driver's License, State Photo ID. US Passport, and/or US Military ID to complete your registration.

1.1.1.3. The USDA Service Center will approve your access to the eTDE system and notify you by email when access is available.

1.1.2. Level One Account Registration

1.1.2.1. Follow steps in 1.1 above. After following Level 1 registration instructions on the eAuthentication website, you must send your username to the System Administrator at etdeadmin@usda.gov.

1.1.2.2. The System Administrator will approve your access to the eTDE system and notify you by email when access has been granted.

1.2.   Registering for Access to eTDE

There are three options: (1) Registering yourself and your company if it is not already registered, (2) registering yourself and associating with your company if it is already registered (3) registering yourself without registering your company or associating with a company.

1.2.1.   eTDE registration steps if your company is not registered for eTDE

1.2.1.1.   Navigate to the eTDE home page where you will see the eTDE Welcome Page (figure 1).

1.2.1.2.   Select 'Login to eTDE' at the bottom of the page.

1.2.1.3.   You will be taken to the eAuthentication Login page where you will need to enter your username and password (figure 3).

Figure 3

1.2.1.4.   You will then be taken to the eTDE Registration Page (figure 4).

Figure 4

1.2.1.5.   Complete the entire eTDE User Registration section. Users should list their local place of work information in the top section and their company information in the lower section.

1.2.1.6.   The first person from each company to register will automatically become an entity administrator by checking the box to 'Register New Entity and Become Entity Administrator' (figure 4). Every company (referred to as entity in this system) needs to have at least one entity administrator (person responsible for managing the system application for the company). The entity administrator has the authority to approve new users from their company when

they register for eTDE. If approved, this will establish a new Entity to which other individual Users can 'associate' (see Administrator User Guide).

1.2.1.7.   You may also check the box 'Entity Information Same as Work Information' if your demographic information in top section is the same for your company.

1.2.1.8.   Select 'Request Registration'

1.2.1.9.   A request is sent to the System Administrator for approval.

1.2.1.10.   When the System Administrator approves the request the new entity is created and a home page is set up where documents owned by the entity reside (figure 5). Once documents are entered into eDocs and have been approved, copies will move to the eTDE module and this view will be available.

USDA United States Department of Agriculture

| Home | Profile | Reports | Entity Admin | Contact Us | Help | Logout |

Electronic Trade Document Exchange System

eTDE > Home

User:	TestEntAdmin03 TestEntAdmin03
Entity Name:	BirdsongPeanuts
Commodity Type:	Peanut

Trade Documents

Select	Document Info	Commodity Type	Document ID	Document Type	Certificate Number	eTDE Reference	Date Uploaded	Assigned ?
☐	MetaData	Almond	20815	Almond_Inspection	Almond_INS1	VAH1Lot12001	08/29/2008	YES
☐	MetaData	Almond	20821	Almond_Aflatoxin	Almond_AFA45	VAH1	08/29/2008	YES
☐	MetaData	Peanut	20852	Blanching	Bla4	VAH1Lot101	08/29/2008	NO
☐	MetaData	Peanut	20936	Grade	Gra4	VAH1Lot101	08/29/2008	NO
☐	MetaData	Peanut	20942	Notice of Sampling	Not4	VAH1Lot101	08/29/2008	NO
☐	MetaData	Peanut	20948	Transfer Clearance	Tra4	VAH1Lot101	08/29/2008	NO
☐	MetaData	Peanut	20954	Quality	Qua4	VAH1Lot101	08/29/2008	NO
☐	MetaData	Peanut	21002	EU Aflatoxin	EU_4	VAH1Lot101	08/29/2008	NO
☐	MetaData	Peanut	21008	US Aflatoxin	US_4	VAH1Lot101	08/29/2008	NO

[Manage User Access] [Supersede Document]

Search

By Commodity Type:	All	By Document ID:		By Document Type:	All
By eTDE Reference:			By Certificate Number	
By Date Uploaded From:		To:		(use mm/dd/yyyy date format)

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Figure 5

1.2.1.11. While approval is pending, any time you log into eTDE you will be taken to the Profile Page (figure 6)

Figure 6

Please note that if you click 'Cancel' and do not complete your registration request, you will be taken to the eTDE Welcome Page.

1.2.2. Associate with your company that is already registered

This section provides guidance on associating with an entity (company) once the entity administrator has established the company in eTDE. Follow these steps if another user has already registered your company and you want to associate your registration with your company so that you can have access to documents assigned to your company.

- 1.2.2.1. Navigate to the eTDE home page http://www.etde.usda.gov where you will see the eTDE Welcome Page (figure 1).
- 1.2.2.2. Select 'Login to eTDE' at the bottom of the page.
- 1.2.2.3. You will be taken to the eAuthentication Login page where you will need to enter your username and password (figure 3).
- 1.2.2.4. You will then be taken to the eTDE Registration Page (figure 4).
- 1.2.2.5. Complete only the top portion of the registration page (figure 4) before selecting 'Request Registration'. **Important: Do not** select 'Register New Entity and Become Entity Administrator' or 'Entity Information same as Work Information' boxes. **Do not** complete the bottom portion for Entity Registration Request. Selecting these would create a new entity and you are wanting to associate with an existing entity.
- 1.2.2.6. Next, you will be taken to the Profile Page (figure 6), select your company from the list at the bottom of the page and select "Request Association". Your profile information should be your local work place information. **Do not select Entity and External System Registration request because you do not want to create a new entity**.
- 1.2.2.7. You will receive an email notification when the Entity Administrator (first person from your company to register for eTDE) has approved your eTDE registration request.
- 1.2.2.8. You are now an associated user and have access to the eTDE Home Page and the capability to access documents and certificates for which your entity is the document Provider, document Owner, and/or access has been granted by the document Owner.

1.2.3. Register yourself without registering your company and without associating with a company.

- 1.2.3.1. Access will be limited until you associate with a company as described in the section above. This should be done if you do not wish to be Entity Administrator and your company is not yet registered, or if you do not know which company to associate with.
- 1.2.3.2. Navigate to http://www.etde.usda.gov where you will see the eTDE Welcome Page (figure 1).
- 1.2.3.3. Select 'Login to eTDE' at the bottom of the page.
- 1.2.3.4. You will be taken to the eAuthentication Login page where you will need to enter your username and password (figure 3).

1.2.3.5.   You will then be taken to the eTDE Registration Page (figure 2).

1.2.3.6.   Complete only the top portion of the registration page before selecting 'Request Registration. **Important: Do not** select 'Register New Entity and Become Entity Administrator' or 'Entity Information same as Work Information' boxes. **Do not** complete the bottom portion for Entity Registration Request.

1.2.3.7.   Next, you will be taken to the Profile Page, complete or change any User Profile information necessary. Your profile information should be your local work place information. Do not select Entity and External System Registration request if you do not want to create a new entity.

1.2.3.8.   If you log out at this point you will not be registered to a company.

2. Managing Your User Profile

2.1. Unassociated User Functions

If you have registered for eTDE but have not yet associated with a company and need to edit your profile, register, and/or associate with a company, follow the instructions below.

2.1.1.   Editing your profile

2.1.1.1.   Navigate to your Profile Page and change information in your profile as necessary.

2.1.1.2.   Select 'Update Profile'

2.1.1.3.   When "Transaction Successful" message appears your profile information has been updated with changes

2.1.2.   Registering a company

2.1.2.1.   On the Profile Page select 'Entity and External System Registration Request' (figure 6).

2.1.2.2.   You will be directed to the Entity and External System Registration page (figure 7). Users that are currently associated with an Entity will not have the ability to request Entity Registration. If user is not associated with an Entity, "Register New External System" checkbox will be "grayed" out.

Figure 7

2.1.2.3.   Check the box 'Register New Entity and Become Entity Administrator. As Entity Administrator you will have the authority to approve other users registration and association requests for your company (see Administrator User Guide).

2.1.2.4.   Complete demographic information for your company.

2.1.2.5.   Select 'Request Registration'.

2.1.2.6.   Entity registration request is sent to Systems Administrator.

2.1.2.7.   You will be notified by email when your request is approved and the next log in will take you to the Home Page with the capability to access documents and certificates for which your entity is the document Provider, document Owner, and/or access has been granted by the document Owner.

2.1.3. Associating with a company

    2.1.3.1.   Navigate to your Profile Page and select the radio button corresponding to the company (entity) you wish to associate with (figure 6).

    2.1.3.2.   Submit the request by selecting 'Request Association'.

    2.1.3.3.   The Entity Association request is sent to the Entity Administrator.

    2.1.3.4.   Once the Entity Administrator has approved the request you will receive an email notification. The next time you log in you will be taken to your Home Page and have access to documents and certificates for which your entity is the document Provider, document Owner, and/or access has been granted by the document Owner.

2.2. Associated User Functions

Associated user functions include disassociating with a company, registering an external system, or requesting entity administrator registration.

2.2.1. Disassociating with a company

    2.2.1.1.   You may wish to disassociate with a company if, for example, you leave the company and/or change to another company*.

    2.2.1.2.   On your profile page select 'Disassocate'.

    2.2.1.3.   Then select 'Request Disassociation'.

    2.2.1.4.   Once the "Transaction Successful" message appears you will no longer be associated with that Entity. A Disassociation notification is sent to the Entity Administrator.

* Note: if you are the Entity Administrator and are leaving the company, you should have another employee request to be the Entity Administrator before you disassociate.

2.2.2. Registering external system

    2.2.2.1.   External System registration is only needed if your company plans to automate transfer of documents. For exporters requesting certificates through eDocs, this section is not applicable.

    2.2.2.2.   On your profile page select 'Entity and External System Registration Request' button.

    2.2.2.3.   You will be taken to eTDE Entity and External Registration Request Page (figure 8)

Figure 8

       2.2.2.4.   Select 'Register New External System' and complete demographic information

       2.2.2.5.   Select 'Request New External System'

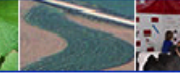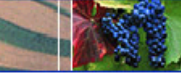   2.2.2.6.   Request is sent to the Entity Administrator for approval.

2.2.3. Requesting Entity Administrator registration

       2.2.3.1.   An associated user will have the ability to request Entity Administrator registration

       2.2.3.2.   If the user has been deactivated as an Entity Administrator for their associated Entity, the user will not be able to submit another request.

       2.2.3.3.   On your profile page select 'Administrator Registration Request' (Figure 9)

Associated User Profile Page

Figure 9

2.2.3.4.   You will be taken to the Administrator Registration Request
Page (figure 10)

Figure 10

2.2.3.5. Select 'Request to be an Entity Administrator' radio button. Do not select 'Request to be a System Administrator'. This is reserved for USDA personnel only.

2.2.3.6. Select 'Request Registration'

2.2.3.7. Entity Administrator request is sent to the System Administrator for approval.

2.2.3.8. To be removed as Entity Administrator please send a request to the System Administrator at eTDEAdmin@usda.gov

2.2.3.9. The System Administrator may also be contacted to inactivate an employee who has left their company.

2.2.3.10. When an employee who is the only Entity Administrator leaves a company, another employee should request to be an Entity Administrator.

3. Using eTDE System after you are registered and associated

All documents created in eDocs, through OCR methods, or FTP transfer flow to eTDE. The Home Page (figure 11) will list the user's first name, last name, and commodity type at the top of the page. The trade documents section lists all accessible certificates uploaded in the past 7 days. The trade documents are displayed by commodity type, document I.D., document type, eTDE reference, certificate number, date uploaded and assignment status.

3.1. Accessing certificate metadata (certificate descriptive information)
3.1.1. Select 'Metadata' under Document Info column for the document you are interested in.

Figure 11.

3.1.2. The following information will be displayed for the certificate: Document Owner, Document Provider, Product, Document ID. External System, Document Type, Certificate Number, document Status, Certificate Number Superceding, Certificate Number Superceded, eTDE Reference, Date Issued, Date Uploaded. Document Access info: User First Name, User Last Name, Entity Name (for which the User is associated), Date, and Timestamp.

3.2. Viewing certificates

3.2.1. Select the Document ID number of the certificate you would like to view.

3.2.2. A pdf of this certificate will be displayed.

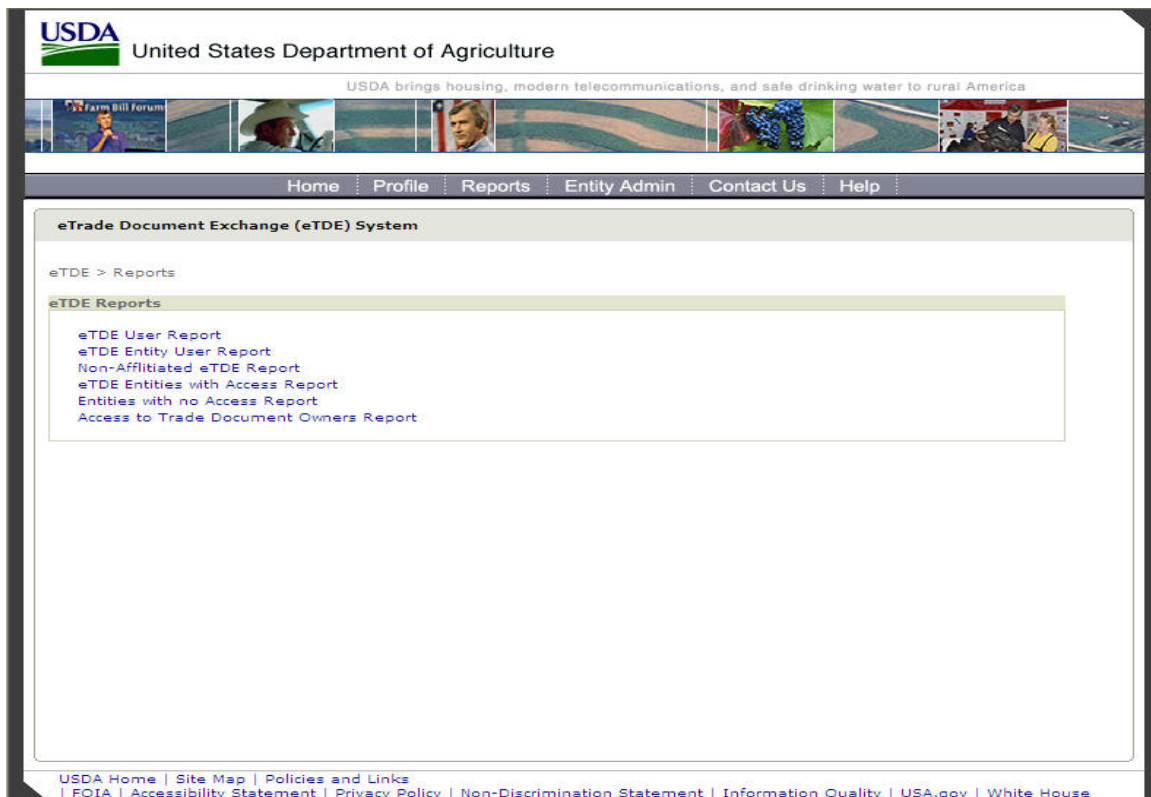3.2.3. Closing the document will take you back to the Home Page

4. eTDE Reports

Figure 12

4.1. Reports

4.1.1. Report Types

4.1.1.1.   Selecting 'Reports' on the menu bar takes you to the Reports Page where six different types of reports are available depending on your status. All reports may not be available.

4.1.1.2.   eTDE User Report displays a list of Trade Document Users with access and entity association within the eTDE system. The System Administrator has the capability to filter by Last Name and First Name. Primary user is System Administrator

4.1.1.3.   eTDE Entity Users report will allow the Entity Administrator to view a report on all Users associated with their Entity. The Entity administrator will have the ability to filter by associated users Last Name and First Name. Primary user is Entity Administrator.

4.1.1.4.   Non-Affiliated eTDE Report will allow the eTDE System Administrator to view information on all users who have not been associated with an entity, including their expiration date should they not associate with an entity. The System Administrator has the ability to filter by Last Name, First Name, and Activation Expiration Date. Primary user is System Administrator.

4.1.1.5.   eTDE Entities with Access Report allows the Trade Document Owners to view information on all entities that have access to the Trade Document Owner's data and which documents those entities have access to. The Owner will have the ability to filter by Date Uploaded From and To. Primary users are Entity Administrator and Trade Document Owner.

4.1.1.6.   Entities with No Access Report allows the eTDE System Administrator to view information on all the entities that have not been given access to any entity data. The System Administrator has the capability to filter by Entity Name and Entity Activated Date.

4.1.1.7.   Trade Document Owner Report allows the Trade Document User to view information on who has given access permissions to the Trade Documents. The user will have the ability to filter by Owner Name, Date Uploaded From and To.