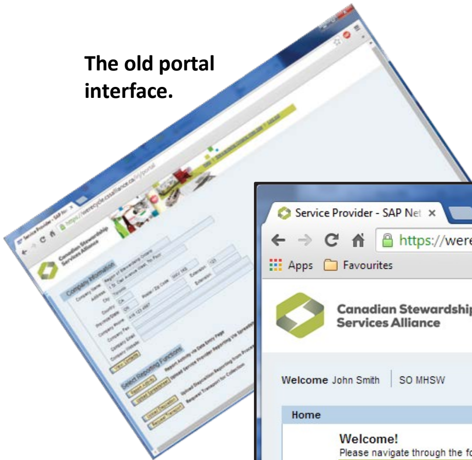
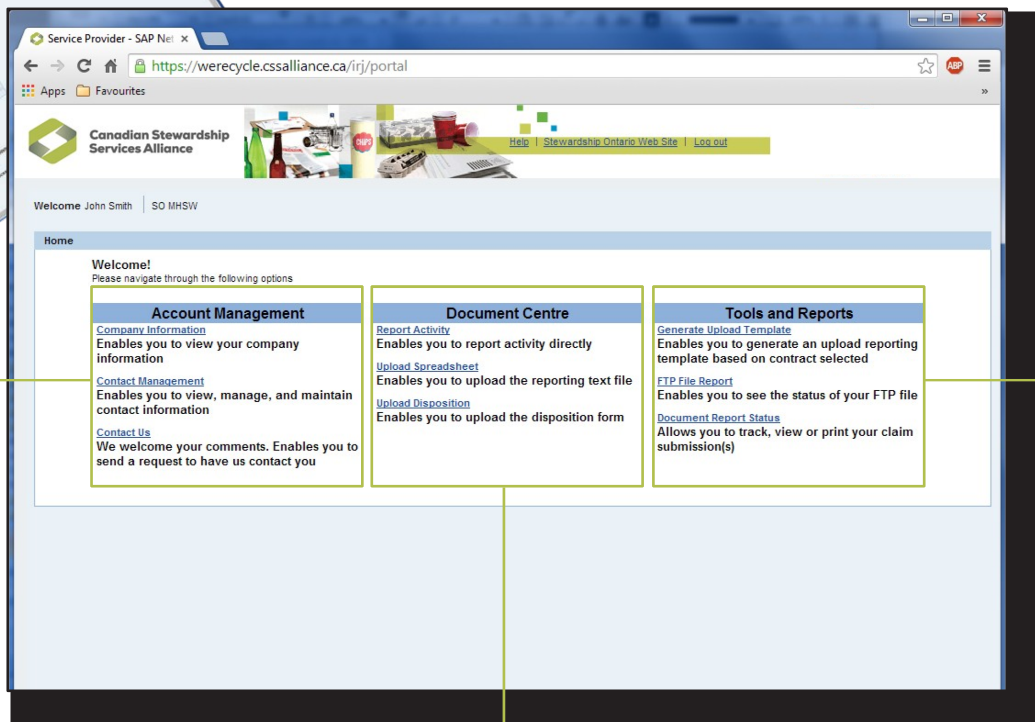
Reporting Portal Tips

The old portal interface.



The new and improved portal interface.



Account Management Centre

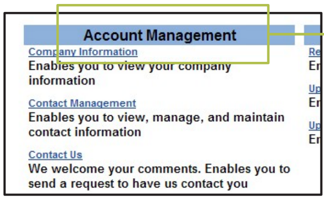
Click **Company Information** to review information about you company or municipal program. Click **Contact Management** to manage the roles of individual contacts, or **Contact Us** at Automotive Materials Stewardship.

Document Centre

Click **Report Activity** to enter data, **Upload Spreadsheet** to upload the data generated from a pre-formatted spreadsheet, or **Upload Disposition** to enter data using an online form.

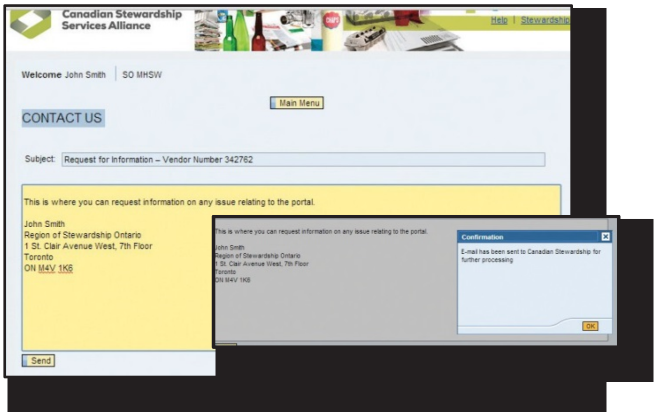
Tools and Reports Centre

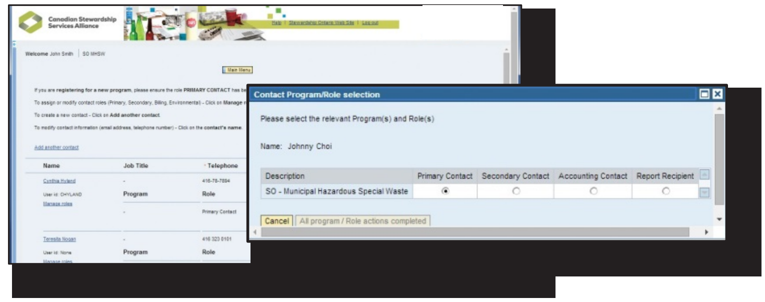
Generate an **Upload Spreadsheet**, review the status of an **FTP File Report**, or choose **Document Report** to view and print a claim summary.



Manage your account

The **Account Management Centre** is where you review company or municipal program information, manage and maintain company or municipal program contacts, or contact program representatives with any question you have.





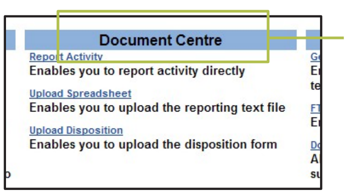
Contact Us

The new **Contact Us** text field offers a place to ask any questions you may have. After you have typed a message above your name, click the yellow **Send** icon. The message will be delivered to the representative who is best able to answer your question. A confirmation window will appear when the message is delivered. Click the **OK** icon to close the confirmation window.

Contact Management

If you are a Primary Contact and want to change someone's contact information, click the person's **name.** Enter new information in the white text fields. Click the **Manage Roles** link under the person's name to assign roles as a Primary Contact, Secondary Contact, Accounting Contact, or Report Recipient. Only the Primary Contact can make changes.

A **Primary Contact** will receive Purchase Order information and invoices, and can manage other roles. A **Secondary Contact** is assigned to act in the Primary Contact's absence. The **Accounting Contact** is responsible for accounts payable or receivable. A **Report Recipient** receives reports but cannot submit reports or data.



Report your data

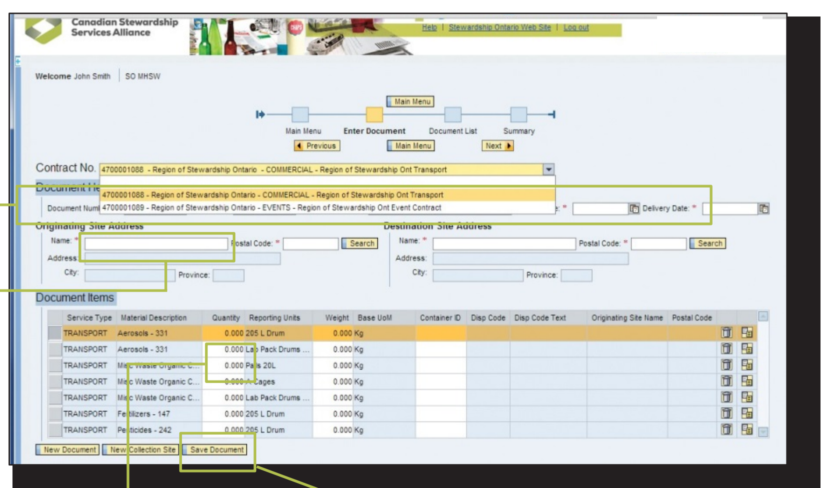
The Document Centre is where you enter activity data, upload a formatted spreadsheet, or upload a disposition form. Remember to save your data frequently. If you do not enter any new data for 20 minutes, any unsaved changes will be lost!

Select a Contract Number

Use the dropdown menu to select the contract for which you are reporting.

Enter Information

Click a white text field to enter information. Text fields marked with * must be completed. Blue text fields are filled automatically.



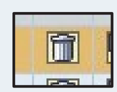
The Report Activity screen

Report Data

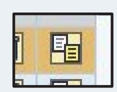
Click a white cell to enter the quantity, date, or other data for identified material. Blue cells are filled automatically.

Save Data

Click the **Save Document** icon after you enter data. The Primary, Secondary, and Accounting Contacts will all receive a Claim Summary by email.



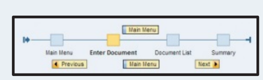
Deletes the line in orange.



Duplicates the line in orange, but not its data.

Opens a report for a **New Collection Site.**

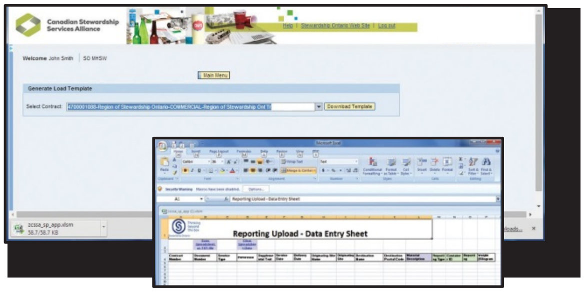
To search a list of available postal codes or names, enter * in the white text field and click the **Search** icon.



Click the **Previous**, **Main Menu**, or **Next** icons to move between the Main Menu, Enter Document, Document List or Summary Pages.

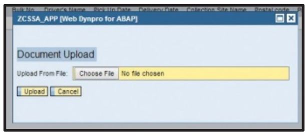
Access tools and reports

The Tools and Reports Centre is where you upload a reporting spreadsheet that can be completed offline, view the status of FTP data, or view and print claim details.



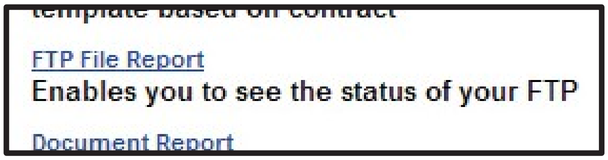
Use a reporting spreadsheet

Spreadsheets can be used to record program data. Use the **Select Contract** dropdown menu to generate the newest version of that contract's Upload Spreadsheet. Sample data will show exactly how a column's data must be entered. **Save the completed spreadsheet as a text file (.txt)** before uploading data to the program portal.



View data submitted through an FTP

High-volume users of this portal can supply information through an FTP (File Transfer Protocol) interface. This data is saved as a secure file located in the cloud, and then automatically downloaded by Automotive Materials Stewardship. File details can be viewed by selecting **FTP File Report**.



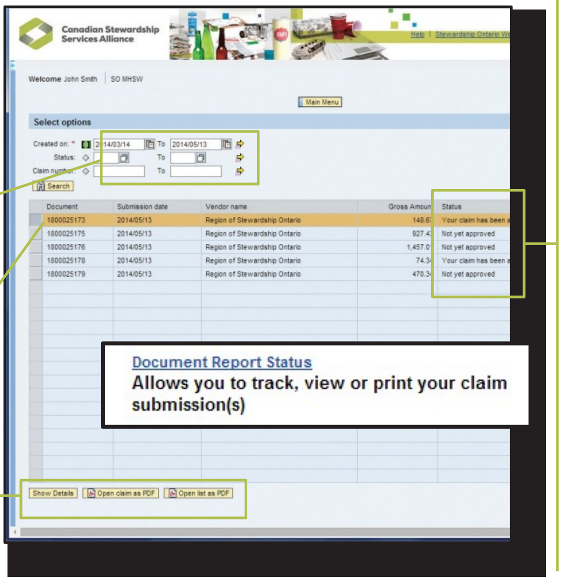
Track, view or print claim submissions

Document Report Status is where you search for specific reports or view a report's current status.

1. **Search for a completed report** – Searches can include a date range, identified status, or range of claim numbers. Click the **Search** icon once range data is entered.

2. **Click on a document to review** – Selected documents will be highlighted in orange.

3. **View the document** – View a selected document's data online by clicking the **Show Details** icon. You can also download a .pdf copy of an individual claim or an entire list.



Status Definitions

NA – Not yet approved: The Service Provider Reporting team is reviewing the claim.

AP – Claim approved: The claim has been reviewed and approved by the Service Provider Reporting team. A purchase order has been generated and issued.

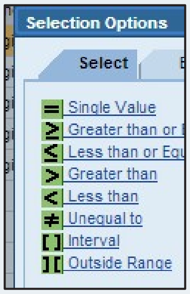
PR – Payment in process: The Finance Department is reviewing the purchase order and invoice.

PP – Payment processed: The Finance Department has processed the invoice. Funds have been transferred electronically, or a cheque has been issued.

Advanced search options

Advanced Search Options make it possible to define search parameters. Click a grey Diamond icon or a green Parameter icon to show the available options.

Select a date using a monthly calendar.

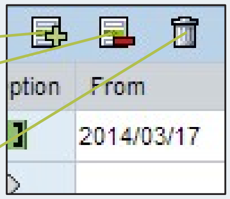


Click on a yellow arrow next to a date, status, or claim number to include more than one range in a search.

Add a line

Delete a line

Delete an entire section



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