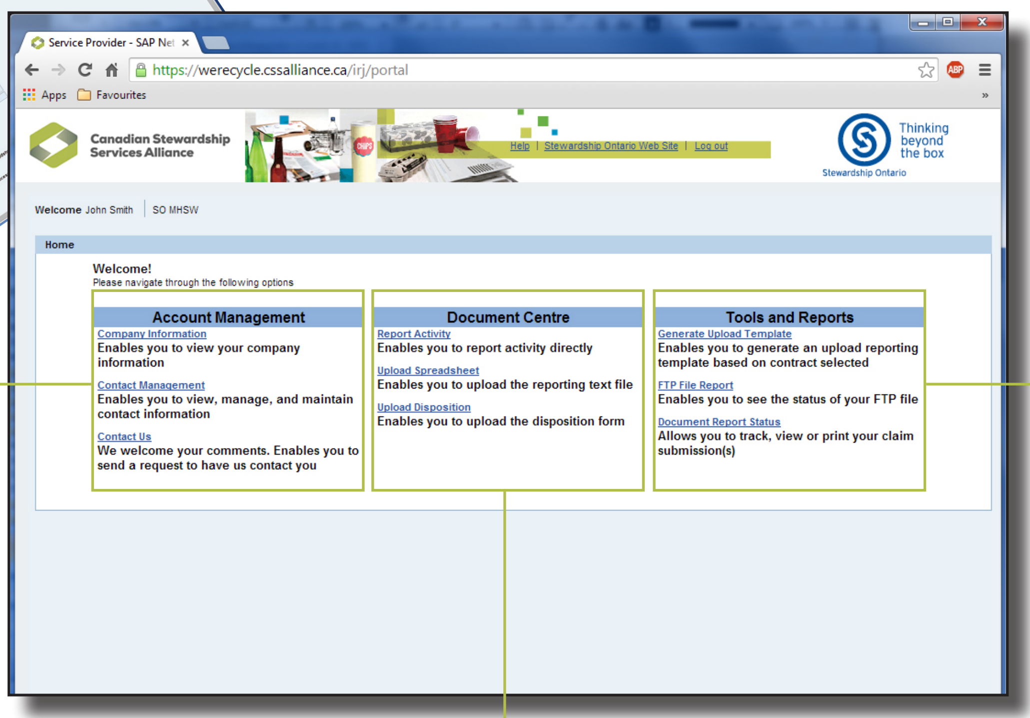
Reporting Portal
Tip Sheets

The old portal interface.

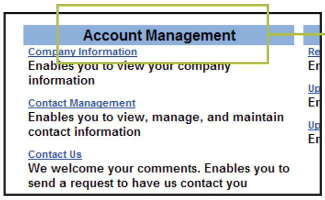
The new and improved portal interface.



1 Account Management Centre – Click Company Information to review information about your company or municipal program. Click Contact Management to manage the roles of individual contacts, or Contact Us at Stewardship Ontario.

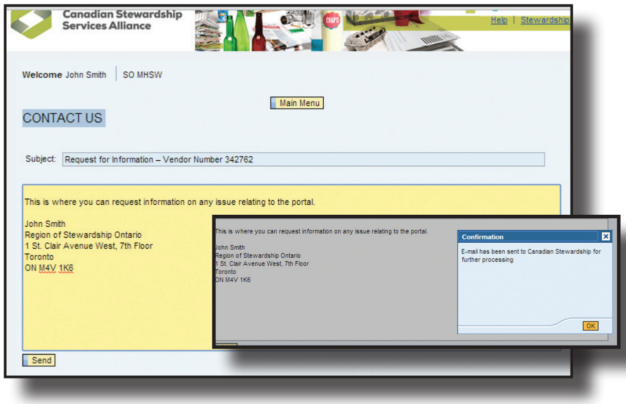
2 Document Centre – Click Report Activity to enter data, Upload Spreadsheet to upload the data generated from a pre-formatted spreadsheet, or Upload Disposition to enter data using an online form.

3 Tools and Reports Centre – Generate an Upload Spread-sheet, review the status of an FTP File Report, or choose Document Report to view and print a claim summary.



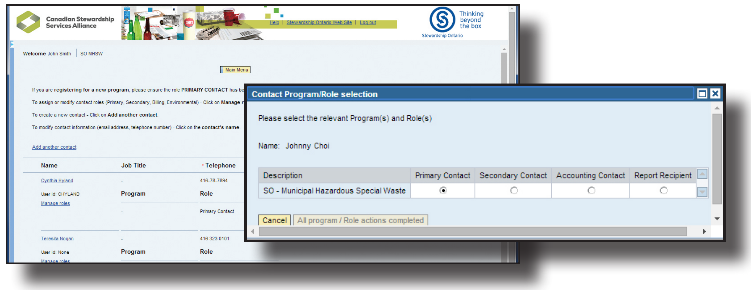
Manage your account

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

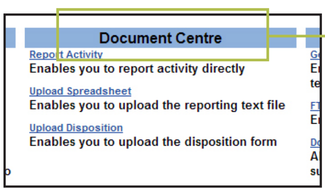
The new **Contact Us** text field offers a place to ask any questions you may have. After you have typed a message above your name, click the yellow **Send** icon. The message will be delivered to the representative who is best able to answer your question. A Confirmation window will appear when the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

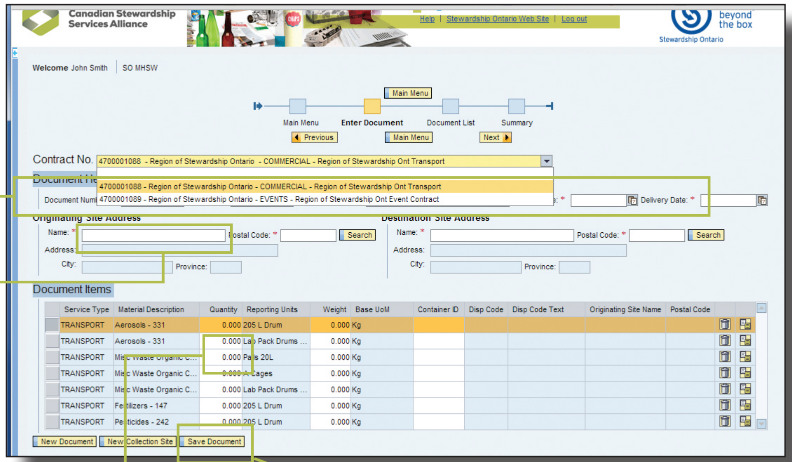


Report your data

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!

1 **Select a Contract Number** – Use the dropdown menu to select the contract for which you are reporting.

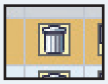
2 **Enter Information** – Click a white text field to enter information. Text fields marked with * must be completed. Blue text fields are filled automatically.



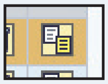
The **Report Activity** screen

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

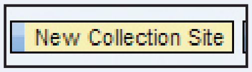
4 **Save Data** – Click the **Save Document** icon after you enter data. The Primary, Secondary, and Accounting Contacts will all receive a Claim Summary by email.



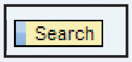
Deletes the line in orange.



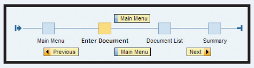
Duplicates the line in orange, but not its data.



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



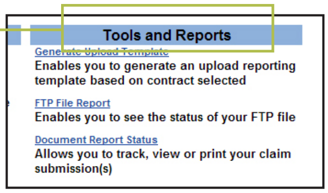
To search a list of available postal codes or names, enter * in the white text field and click the **Search** icon.

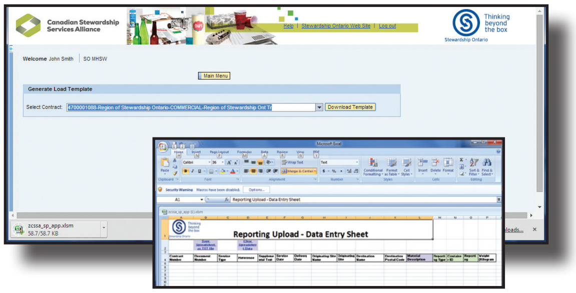


Click the **Previous**, **Main Menu**, or **Next** icons to move between the Main Menu, Enter Document, Document List, or Summary pages.

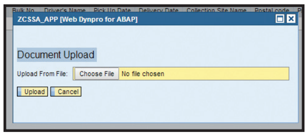
Access tools and reports

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.





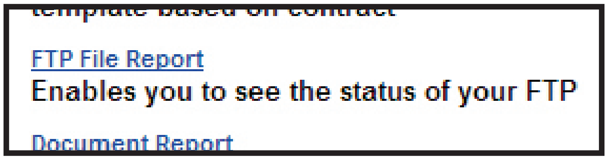
Use a reporting spreadsheet



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 Stewardship Ontario. File details can be viewed by selecting **FTP File Report**.



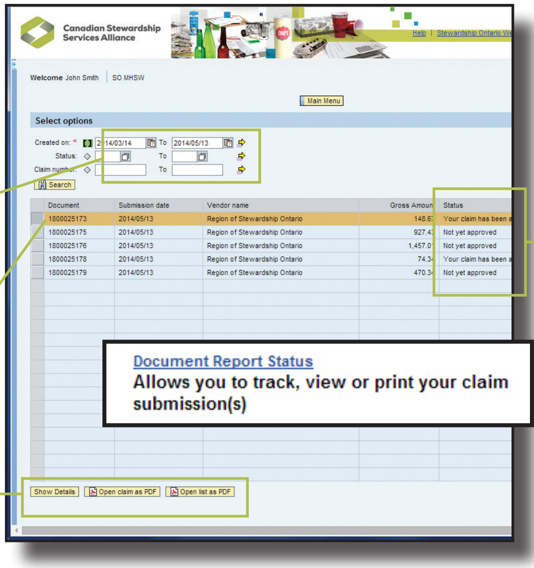
Track, view or print claim submissions

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.

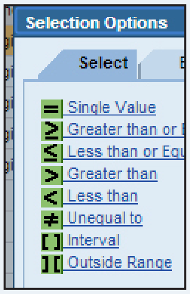
PR – Payment in process: The Finance Department is reviewing the purchase order and invoice.

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.

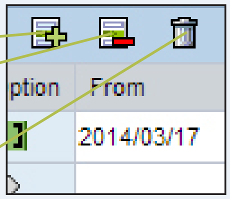


Click on a yellow arrow next to a date, status, or claim number to include more than one range in a search.

Add a line

Delete a line

Delete an entire section



Thinking beyond the box

Stewardship Ontario