

RDRS Contacts Management Guide

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How contacts work in RDRS

The primary contact is responsible for overseeing their organization/site and quarterly reporting for all reporting entity activities on a site in the Recycling and Disposal Reporting System (RDRS). This includes the option of assigning other non-primary contacts the permission to submit quarterly reports and/or change organization/site and reporting entity activity information. RDRS allows primary contacts to add non-primary contacts and assign these contacts the following permissions for their site/organization:

- Ability to view organization/site data but not change any information.
- Ability to enter, edit, submit and revise reporting entity quarterly reports.
- Ability to change organization/site information including adding and editing reporting entity activity information for an organization/site, changing general organization/site information such as address and operator info, and requesting status changes to organization/sites and reporting entity activities.
- Ability to add and edit non-primary contacts and assign permissions to a non-primary contact to report and change organization/site information.

This guide shows how to add new non-primary contacts, add the contact permissions listed above and change the primary contact for an organization.

How to add a contact

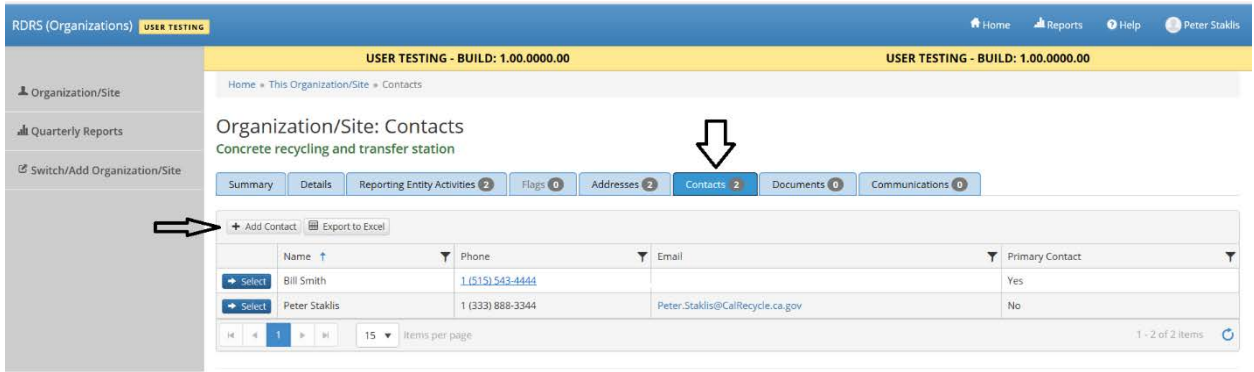
Primary contacts are allowed to add new contacts, edit existing contact information and change permission levels for a non-primary contact. An unlimited number of non-primary contacts can be added for an organization/site.

Steps for adding a new contact include:

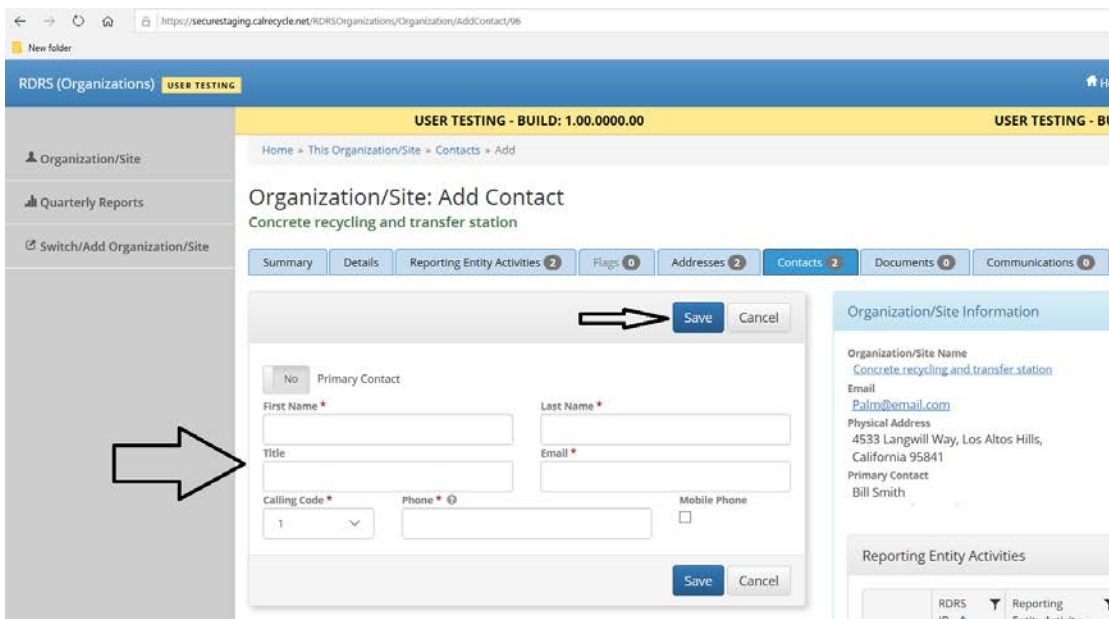
- Adding a non-primary contact for a site/organization
- Setting the permissions for a non-primary contact
- Having the primary contact create a WebPass so they can access RDRS

Adding a Contact

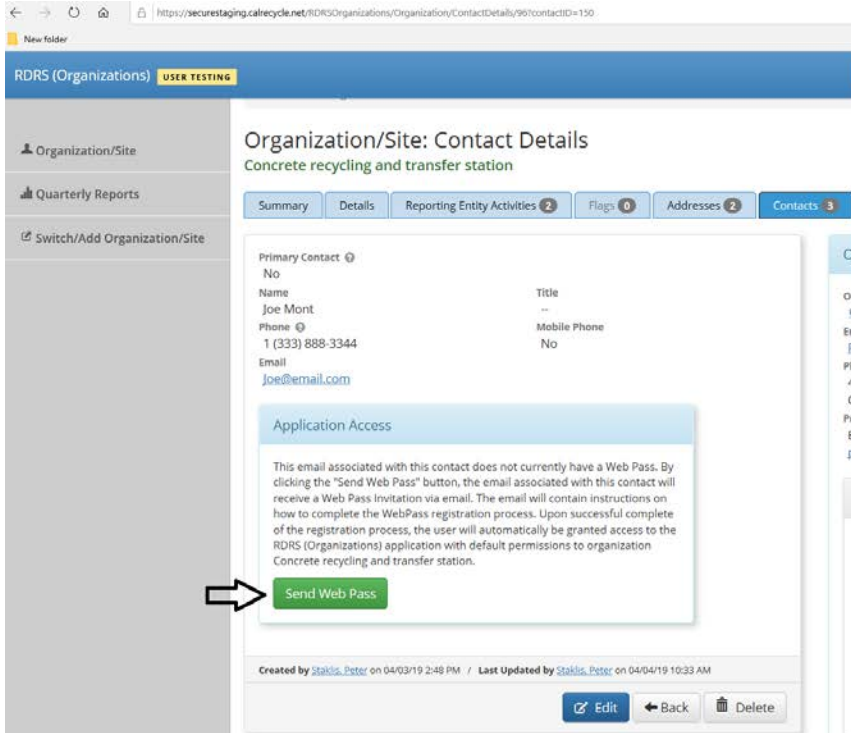
- Select the Contacts tab. Select the '+Add Contact' button



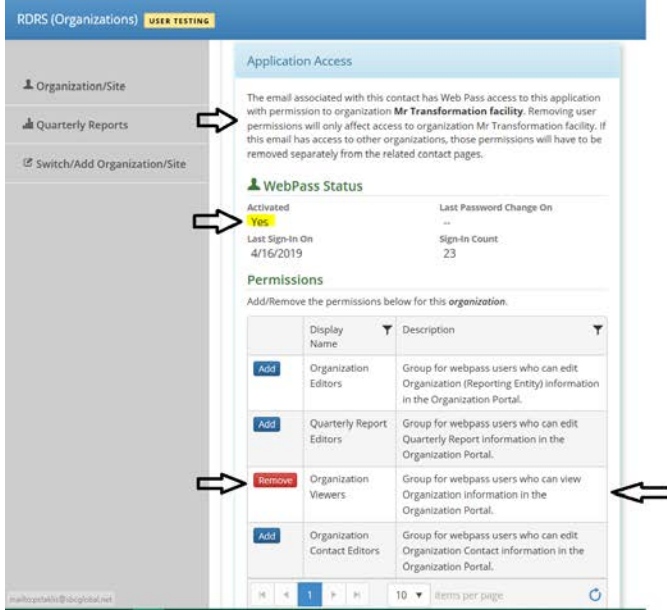
- Add the contact's info including first and last name, email, calling code and phone number. Add the title if you wish.
- Select 'Save' to add the contact.



- If the contact does not have a WebPass, the 'Send Web Pass' button will appear. Click the button to send an e-mail notice and link to the contact to create a WebPass. Once a contact has created a WebPass they will be able to access your organization/site in RDRS.



- If the contact that was added already has a WebPass, a message will appear that the contact already has a WebPass and the 'Activated' field under WebPass Status will show 'Yes'. The contact will have read only access to your organization/site when they use RDRS



- Contacts added to RDRS are given Organization Viewer read only access to organization/site data by default. See the next section for steps on how to add additional permissions to a contact.

How to add or remove permissions for a non-primary contact

- Contacts added to RDRS are initially given read only access to organization/site information. You may wish to grant new contacts additional access to an organization/site such as the ability to view and submit reports or change organization information. Initially, only primary contacts can change the security permission for other non-primary contacts. A primary contact can assign another contact the ability to change permissions for organization/site contacts.
- Non-primary contacts can be given the following access to an organization/site's information:
 - Organization Editors:
 - Change organization/site information including adding or editing reporting entity activities and changing organization/site information such as site address.
 - Quarterly Report Editors
 - Create, enter, edit and submit quarterly reports for all reporting entity activities for an organization/site. Non-primary contacts must have this access to view quarterly reports. Contacts with this access also have permission to view but not change organization/site information.
 - Organization Viewers
 - Can view but not change organization/site information.
 - Organization Contact Editors
 - Can add new contacts, edit existing contacts and assign permissions to non-primary contacts. Can change the primary contact for an organization/site.
 - Note: The primary contact is automatically given all security permissions including the ability to submit quarterly reports, add, edit or delete contacts, change the permissions for contacts or change the primary contact for a site/organization.

Changing permissions for a non-primary contact

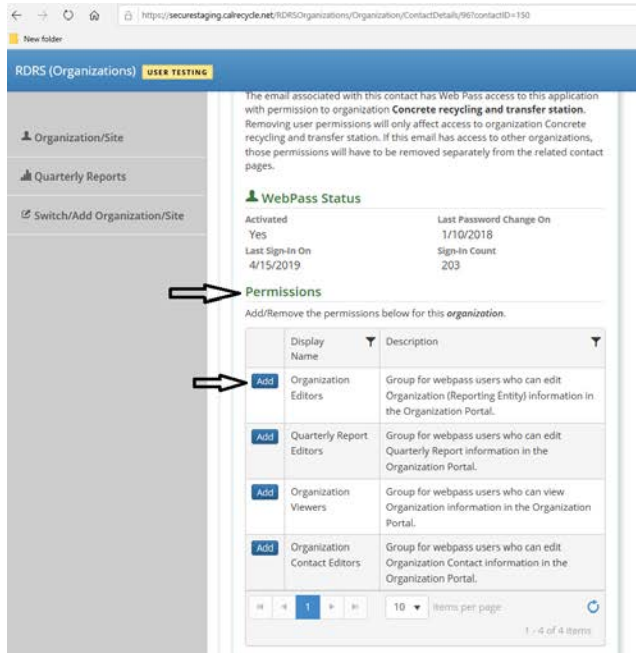
- Click on the Contacts Tab. The list of all current contacts for the organization/site will be displayed.
- Select a non-primary contact by selecting a contact that has 'No' in the 'Primary Contact' column. Select the 'Select' button next to the contact's name.

The screenshot shows the RDRS (Organizations) interface. The top navigation bar includes 'Home', 'Reports', 'Help', and 'Peter Staklis'. The main content area is titled 'Organization/Site: Contacts' for 'LA transfer station (Test 1)'. Below the title are tabs for 'Summary', 'Details', 'Reporting Entry Activities', 'Flags', 'Addresses', 'Contacts', 'Documents', and 'Communications'. The 'Contacts' tab is active, showing a table with the following data:

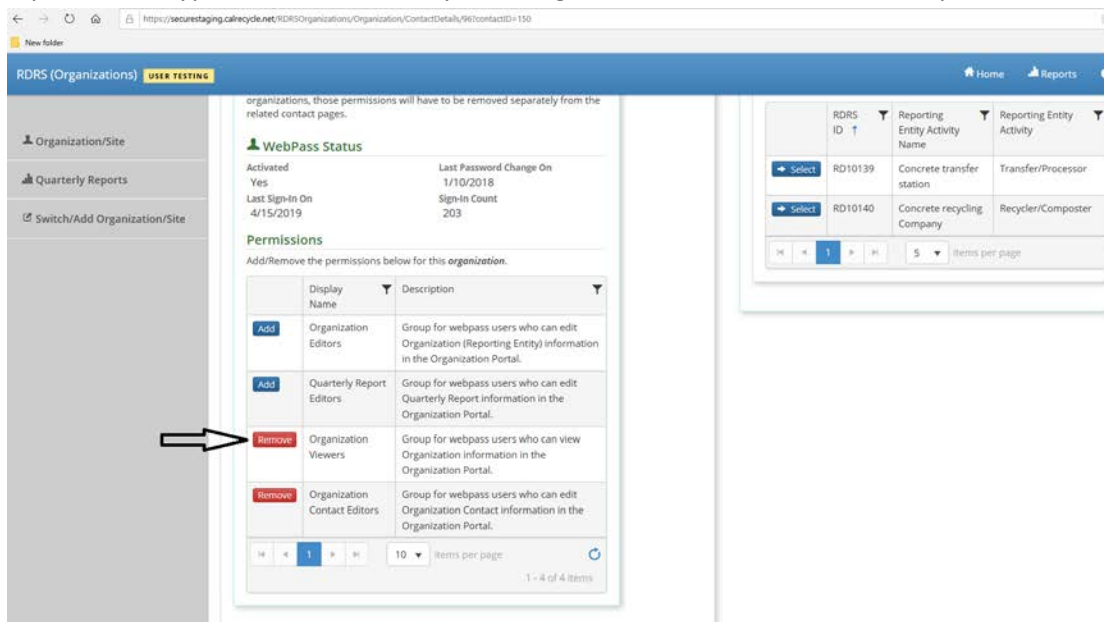
Name	Phone	Email	Primary Contact
Bill Clay	1 (916) 111-3444	BC@email.com	No
Joe Jones	1 (916) 111-3444		Yes

Arrows in the image point to the 'Select' button next to 'Bill Clay' and the 'No' in the 'Primary Contact' column for Bill Clay.

- Add up to four types of security permissions to the contact by selecting the 'Add' button next to the permission.
 - Organization Editors
 - Quarterly Reports Editors
 - Organization Viewers
 - Organization Contact Editors

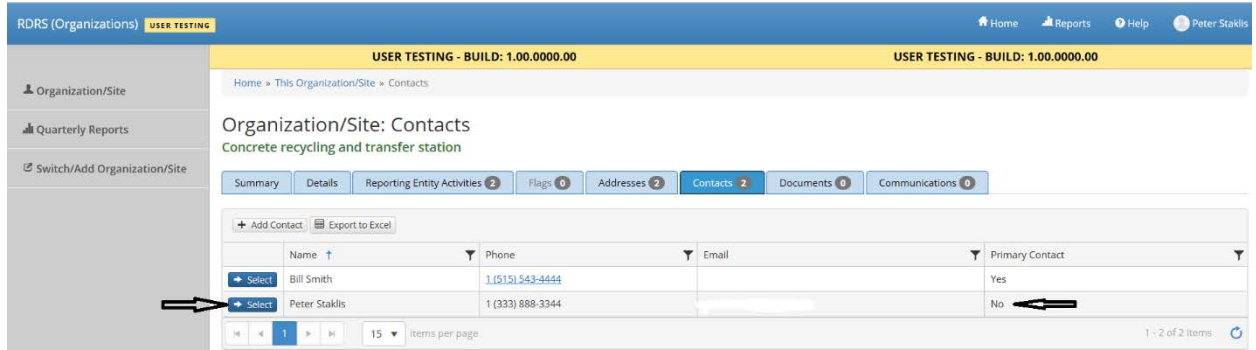


- A permission type can be removed by selecting the 'Remove' button next to a permission.

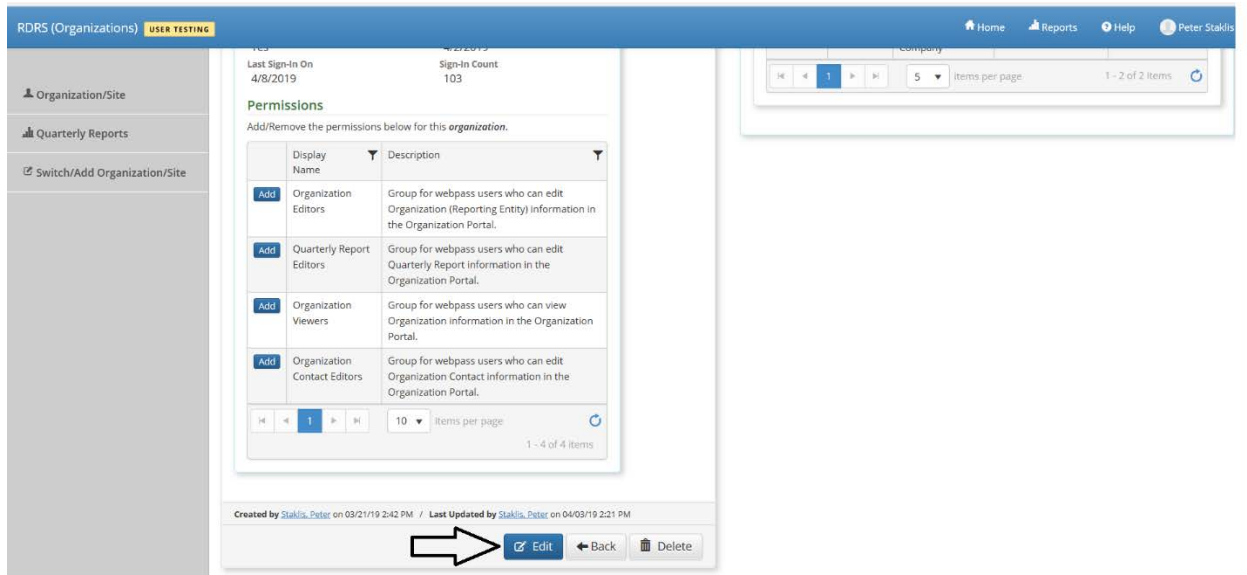


How to make an existing contact the primary contact

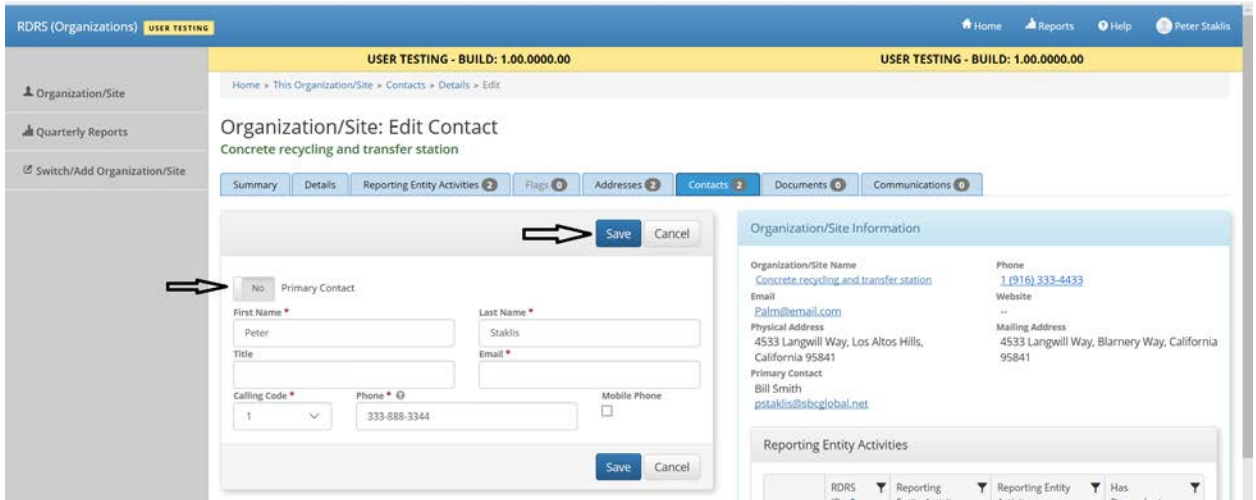
- Click on the Contacts Tab. The list of all current contacts for the organization/site will be displayed. The Primary contact will have a 'Yes' in the 'Primary Contact' column.
- To choose a non-primary contact, select 'Select' next to a contact that has 'No' listed under the 'Primary Contact' column.



- Select the 'Edit' button to change the contact's info.



- Change the primary contact button to 'Yes'
- Select the 'Save' button.



- A message will appear asking if you'd like to change the contact to be the primary contact. Select 'Yes'.

