USER MANUAL

‘system level 2019’

version 5

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of the

EUROPEAN ASSOCIATION OF
ELECTRICAL AND ELECTRONIC
WASTE TAKE BACK SYSTEMS

History & options to search

This user manual is the **consolidated version** of the user manual for '**WF-RepTool - system level'** provided from September 2007 until December 2017. In December 2018 version 4.6 was installed, new features are marked as NEW18.

⇒ In October 2019 the new **version 4.7** will be installed, new features are marked as NEW19. This '**user manual - system level 2018'** provides information on new program features implemented with this new program version.

Where **new headlines** had been added, the remark NEWyear was put into the headline and it is valid for the **whole point**.

Where **new details** had been added **into the text**, the remark NEWyear was put into the text. The end of the 'new text' is marked with a colour marking.

Screen shots were done from demo datasets from former versions. **New screen shots** were only done where **necessary** for explaining **new features**. In case that **only details** have been changed, no new screen shots were done, but information about changes are given in the Chart explanation.

WF-RepTool versions 'Lite' and 'Pro'

There are **two different versions** of the WF-RepTool:

⇒ with the **'Lite'** version you will have all necessary features to **create a report**,

⇒ the **'Pro'** version will provide all features of the WF-RepTool.

Within this user manual features only available in the 'Pro' version are marked with an entry ('Pro' only).

WF-RepTool opened to 3rd party users

In summer 2013 the WF-RepTool was opened for '**third-party-users'** like treatment operators or others (e.g. association, universities) being interested to have the WF-RepTool under their own administration.

WEEE system / company in this user manual is addressing these 'third-party-users'.

Valid for all is the term '**WF-RepTool access administrator'**.

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1. Installation

1.1. Your installation

Getting the WF-RepTool installed, you will get **two parts:**

- the **WF-RepTool** itself and
- the so called '**Admin tool'**

These are two **separate parts** with two **different addresses** (URL's – see WF-RepTool ending with …/*reptool*, 'Admin tool' ending with …/*users*).

These addresses as well as 'your' **password & login** as the WF-RepTool administrator within 'your' WEEE system / company will be provided with the install information provided by WF-RepTool IT administration (see point 2).

Password & login are the **same** for both applications – see remark to change them soon in point 3.3, page 17.

1.2. Main differences for WEEE operator version

If you have purchased the WF-RepTool as **WEEE operator version**, there will be other data under 'My data' and a slightly different main menu as the menu button 'Companies' will be called 'Treatment partners' (see point 3.1, page 3).

Reports may only be generated for **plants** of the WEEE operator (see point 3.4, page 18 and 'other' treatment partners (see point 3.5, page 19) may only be acceptors of OUTPUT fractions.

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2. Sources of information

2.1. Link to 'user manual - reporter level' & your 'jobs'

All relevant information to **create a report** is given in the '**user manual – reporter level'**.

This 'user manual - system level' will explain **additional points** to be done at the **'administration level'** (see point 3) and **additional features** for the WEEE system / WF-RepTool access administrator (see point 4 ff).

You as the **WF-RepTool administrator** within 'your' WEEE system / company have 'to do the jobs':

- to **configure** the WF-RepTool based on **'your needs'** in your WEEE system / country / company (e.g. language selection) (see point 3.2, page 4 ff),
- to give 'your' **users access** to the WF-RepTool (see points 3.3 and 3.5, page 17 and page 19),
- to be the **'first' 'centre'** for **questions** of 'your' **treatment partners** (e.g. use of correct names for fractions, technologies, questions on national classification etc.),

You may raise **questions** on the program or the waste management contents (e.g. needs to adapt 'WF-RepLists') by contacting the WF-RepTool expert group via the WF-RepTool website - see www.wf-reptool.org / 'Contact us'.

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2.2. Other sources of information

2.2.1. WF-RepTool website

At the **WF-RepTool website** www.wf-reptool.org you will find a lot of information about the WF-RepTool like e.g. '**Videos'** on the tool itself, NEW19 the administration of the tool and on how to create a report, under 'Information' the most actual version of this user manual, presentations on the WF-RepTool and comprehensive FAQ's.

2.2.2. WF-RepTool Guidance document

The 'Guidance document – issues of harmonization' at www.wf-reptool.org / 'Information' can be seen as more **content-oriented information** and should help

- ✓ you as central point for **information for your treatment partners** / reporters as well as
- ✓ you or your '**controllers'** who have to **check reports** assisting you/them with 'lessons learned' on possible mistakes done in other reports.

The Guidance document sums up:

- **general principles** on the **use** of the WF-RepTool,
- **principles** on **creating a WF-RepTool report** (e.g. the 'Target of use approach', the changing recycling definition and the 'purpose of the plant' issue of municipal waste incinerators) and
- lists quite some **issues of harmonization** which should be considered to create a **correct report**.

The Guidance document will be kept as a working document and will be updated with new findings and if new questions are coming up in the future.

2.3. Additional icons used in 'system/administrator – version'

Please see general icons used in the WF-RepTool in the 'user manual – reporter level' (point 1.5 there).

Being logged in as **system user** (see points 3.3, page 17), you may see **additional icons**:

	Hide – hide a controller remark
	Hide all
	Delete – delete a controller remark
	Delete all
	Reactivate - reactivate hidden controller remark(s)

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3. Administration of the WF-RepTool for the WEEE system / company

For using the **administration features** you have to use the **'Admin tool'** access (see point 1.1, page 1: URL ending with …/users).

3.1. Main menu

When you enter the 'Admin tool', you will see the **main menu** for the **administration** of the **WF-RepTool** within 'your' WEEE system / company (see Chart 1).

Below the buttons for the main menu you will see an *'info line'* (see light orange background) containing **the WEEE system / company** and the **user** who logged in.

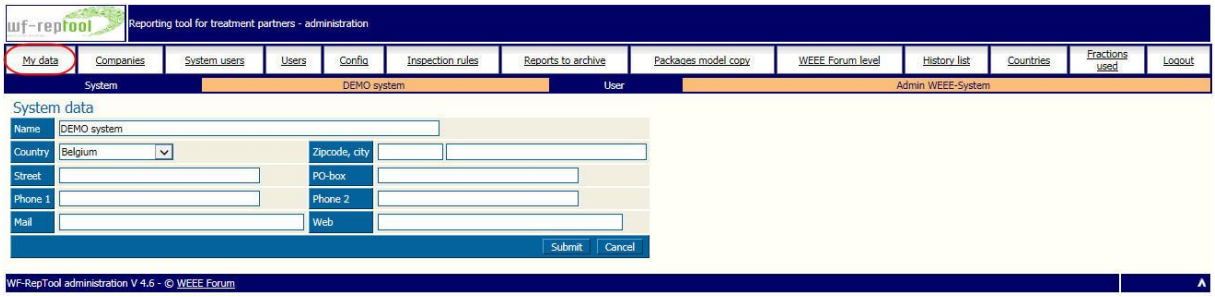

Chart 1: Main menu 'Administration tool'

Under the new main menu button **'My data'** (see Chart 1, red circle) you may **identify** your WEEE system.

If you have purchased the WF-RepTool as **WEEE operator version**, there will be a slightly different main menu and other data under 'My data' (see Chart 2):

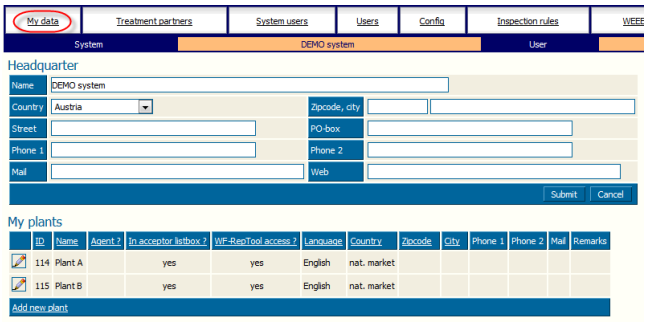

Chart 2: Main menu 'Administration tool' in WEEE operator version

- under **'My data'** you will have the option to identify the **headquarter** of your company und you may do a list of your **plants** (see point 3.4, page 18),
- the menu button '**Companies'** will be called '**Treatment partners'**, the content will be the same (see point 3.5, page 19).

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3.2. Configuration of the WF-RepTool

Under the main menu option '**Config**' you will have the chance to **adapt the WF-RepTool** based on **'your' needs** (see Chart 3). For the details see following sub-points, we follow the order of the page, starting left side.

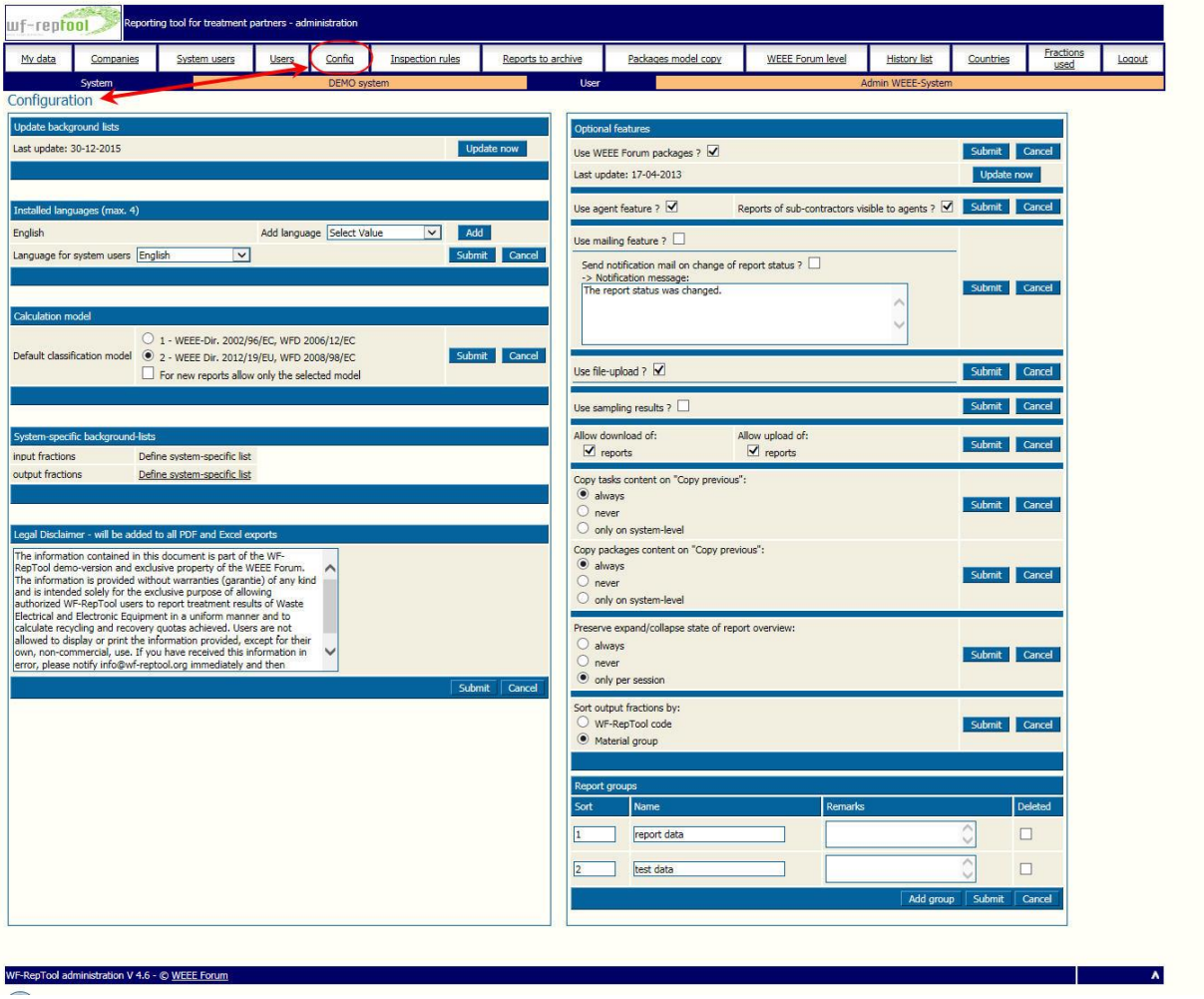

Chart 3: Page 'Configuration'

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3.2.1. Update of background list and translations

3.2.1.1. Update of background list and translations

As first point at the **'Config'** - page (see Chart 3) you will find the entry **'Update background lists'**. Here you will see the information at which date the 'background lists' (WF-RepLists) have been updated last time. Beside you will find an **'Update now'** – button (see box below).

Using this button will **start a process** to contact the WF-RepTool server and **looking** for **'any news'**. If there are 'news', they will be **downloaded** and **installed** to your system automatically.

You should **update** the background lists **from time to time** especially when you got information about news on fractions or similar.

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When you pressed the **'**Update now' – button, be a **bit patient** until you see a **message** on **what** has been **updated**.

The update of background lists also **updates** the **selection** of **available languages** under 'Add language' (see next point 3.2.2).

3.2.1.2. Update of background lists & translations after new program versions & relevant changes of WF-RepLists

Some features of the program like 'shortlists' or 'material grouping' of OUTPUT fractions, the country and market region for acceptors etc. and also the **translated surface words** of the program for the 'reporter level' (see 'user manual - reporter level') depend on the **update** of the **'background lists'** by you as WEEE system / WF-RepTool access administrator.

The update of the background lists is possible:

(1) **immediately** - if you use the English version; if you use any other language and translation is not finished, you will get 'new' entries given in English;

(2) **after finishing of translations** - please check with the translator for 'your' language if or when data are ready.

Entries, which are **deleted** from background lists, will be shown in the lists with a grey background shade.

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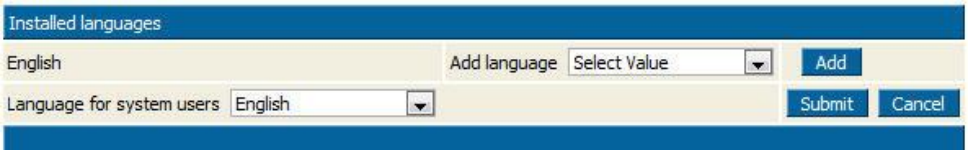
3.2.2. Choose languages

Under **'Installed languages'** (left side, 2nd position in Chart 3, page 4, see box below) you will see the 'list' (left side) all languages which have been installed for your WEEE system / company based on announced wishes & needs.



Beside this 'list' you **might** find a *scroll down* for 'Add language', where you **might** choose from additional languages 'pre-installed' for your WEEE system / company. You will **not find** this *scroll down* for 'Add language' when all available = 'pre-installed' languages have already been chosen.

If you want to **choose** an **additional language** possible **to be used** under your WF-RepTool access, choose from the *scroll down* for 'Add language' and press the **'Add'** – button.

***Take care**: you do not have to confirm by using the **'Submit'** – button, the additional language will be installed after pressing the 'Add' – button*

This downloads the **latest release** of the background lists for the language you have chosen.

By doing the **update** of **available background lists** (see point 3.2.1 before) you will get **all available languages** 'pre-installed'. So you may do the update of available background lists (see point 3.2.1 before) to check if additional languages are available at the WF-RepTool server.

Languages shown in the **'list'** (left side) will be available to be **chosen for** your **treatment partners/reporters** (see Chart 12, page 22).

Below this 'list' you have the option to choose (see *scroll down*) the **'Language for system users'**. By doing this choice you decide in which language you want to provide the **WF-RepTool** at the **system level**.

If you use here any language not installed up to now, the English language will automatically be chosen (but you have e.g. done a pre-selection for the future when 'your' language will be available).

Remark: if you **choose** any **'new'** language to be used at **system level**, you have to **logout & login** to get this **language activated** as menu language in the **WF-RepTool**.

The WF-RepTool administration tool (**'Admin tool'**) itself is and will be provided in **English** only.

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3.2.3. Calculation model

The calculation models for the calculation of recycling and recovery results are defined in the central 'WF-RepLists administration module' at the WF-RepTool server. You get them provided with the update.

You will find **two calculation models** to be chosen by you as WEEE system / WF-RepTool access administrator as **default values** (see box below):

⇒ with classification **model 1 - WEEE-Dir. 2002/96/EC, WFD 2006/12/EC** you may report WEEE treatment results under the **'old' WEEE Directive** from 2002.

⇒ with classification **model** '**2 - WEEE-Dir. 2012/19/EU, WFD 2008/98/EC** you may report WEEE treatment results under the **'new' WEEE Directive** from 2012, which refers for all relevant definitions for treatment results to the Waste Framework Directive 2008.

For all related **information** please see **the 'user manual – reporter level'**, e.g. points 2.2.1.1 or 2.8.1.1.

For **information** on **changes done** in the new calculation model please see the separate document **'*What's new with model 2'*** and a detailed comparison of the old and new WF-RepTool model classification in **'*WF-classification 2013-final - model 1&2.xls*'.** Both documents are provided at the WF-RepTool website under Information / Guidance documents (https://www.wf-reptool.org/index.php/faq-front/guidance-documents).

The **timing** when you as WEEE system / WF-RepTool access administrator change to model 2 as default value is depending on your national requirements. The WF-RepTool expert group recommended the **change to model 2 end of 2015**.

The **default value** for the classification model will be used as **pre-selection** for new reports and packages generated (i.e. new reports/packages and new copy/paste reports/packages).

As WEEE system / WF-RepTool access administrator you may also **fix this selection** by using the checkbox *'For new reports allow only the selected model'*. With this, the 'other' model may not be chosen for new reports and packages, but is automatically set to the selected default model.

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3.2.4. System-specific background lists ('Pro' only)

Under system-specific background lists (4th position, left side in Chart 3, page 4) you may:

- create an **'individual[1] list'** for INPUT and/or OUTPUT fractions and/or
- define (additional) **system = country specific 'names'** for fractions.

You may **choose** the background lists you want to create/adapt by using the underlined wording 'Define system-specific list'.

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3.2.4.1. System specific names for fractions

By using the underlined 'Define system-specific list' you will come to an option to **choose fractions** you want to give system specific 'names' for.

If you **start** doing this the **first time**, this list will be empty (see Chart 4) and you will find an 'Add fractions' – button in the bottom line. You have to search fractions like explained in the 'user manual – reporter level' (see point 2.3.2 'Choose OUTPUT fractions') (see Chart 5).

Chart 4: System specific names - empty list – start

You may **select** all fractions you want to give a 'new' = 'system' = 'country' specific name for by the **'Select'** – button ( ) and they will be transferred to the **'Selected – box'** (see Chart 5).

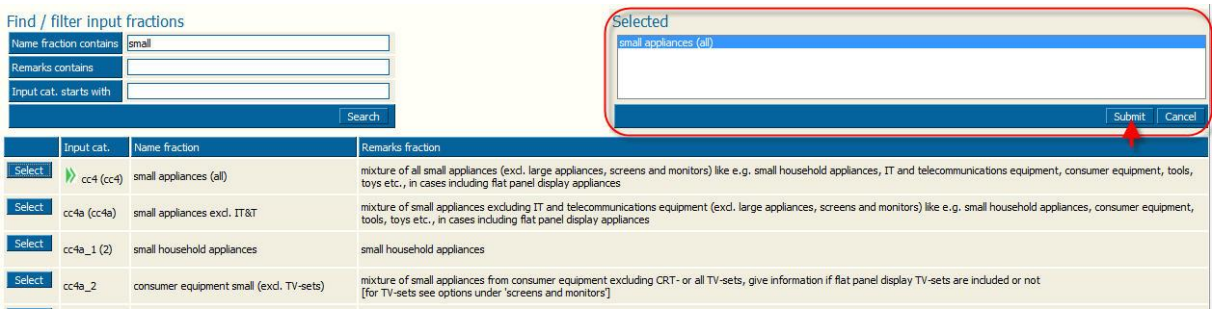

Chart 5: Choose fractions

If you have **chosen all WEEE fractions** you want to give a 'new' = 'system' = 'country' specific name, use the **'Submit'** – button to transfer them to the database and you will come to the 'List of system specific … fractions' – page (see Chart 6).

Of course, you may choose **additional fractions** after having done the first choice. For this use the **'Add fractions'** – button to go for choosing next fractions (see Chart 6 – red arrow, bottom line left side).

[1] *Do not to mix it up with the new 'short list' function – 'user manual - reporter level'*

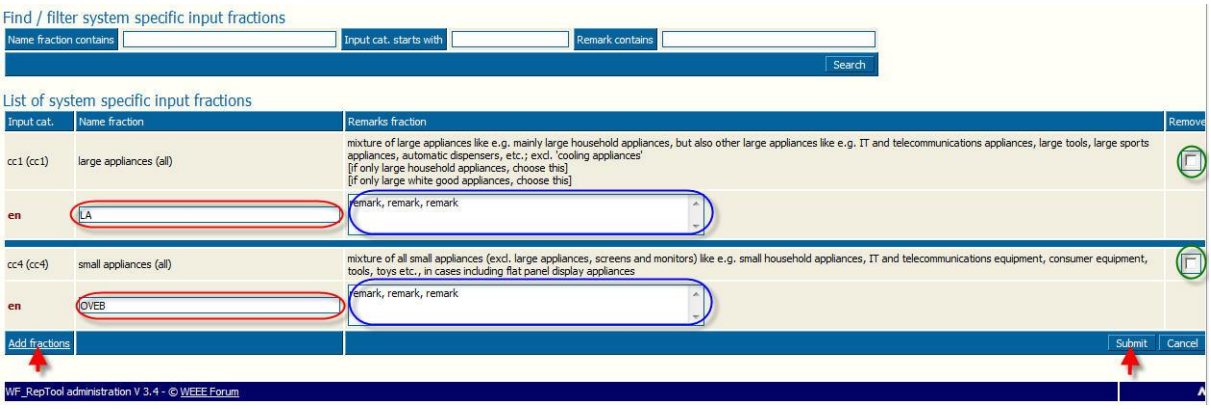

Chart 6: Give system specific names – INPUT fractions (NEW: additional field for national code under Input cat. number)

If you have done your choice, you will come to an **overview** of all fractions selected (Chart 6). Here you have the option to give them 'system' = 'country' specific **names** and **remarks** with lines for all languages you use within your WEEE system / company (see Chart 6 – only one line as in this case only English was chosen as language to be used).

You will find a **language shortcut** left side of each row (see Chart 6).

You may do your **data input** under '**Name** fraction' (see Chart 6 – red wide circles) and also under '**Remark** fraction' (see Chart 6 – blue wide circles).

In the definition of system specific names for INPUT fractions you will find the additional field 'National code'. This was especially added for WEEE systems / companies using the Excel export for creating their reports to the authorities.

Having **finished** this, you have to use the **'Submit'** – button to transfer information to the database (see Chart 6 – red arrow, bottom line right side).

You may **remove** any system specific 'names' for fractions at any time by using the 'Remove' – checkbox (see Chart 6 – green circles) and confirm this with using the 'Submit' – button.

To have a **look at** the system-specific lists or to **continue** working on these lists you may use the 'Config' – button in the main menu and choose the underlined 'Define system-specific list'.

You have the same options for a system-specific list of **OUTPUT fractions** – e.g. to provide country-specific names for fractions *(Remark: please do this only with special care and not being 'contra productive' to the main target of the WF-RepTool to create and work with 'common names')*.

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3.2.4.2. More detailed fractions > more names for fractions

If you want to use (ask for) **more detailed** fractions = **names** for **fractions** for reports to 'your' WEEE system / company, you may **choose = select** a fraction (like explained under point 3.2.4.1) a **second time** (or several times) and give an **additional name** (or several names).

See the example for garden tools and other tools in Chart 7.

You may do the same for a list of system-specific **OUTPUT** fractions (e.g. for different quality classes of cables, more detailed kinds of components, different kinds or quality classes of plastics or glasses etc.) you **want** to **get data reported**.

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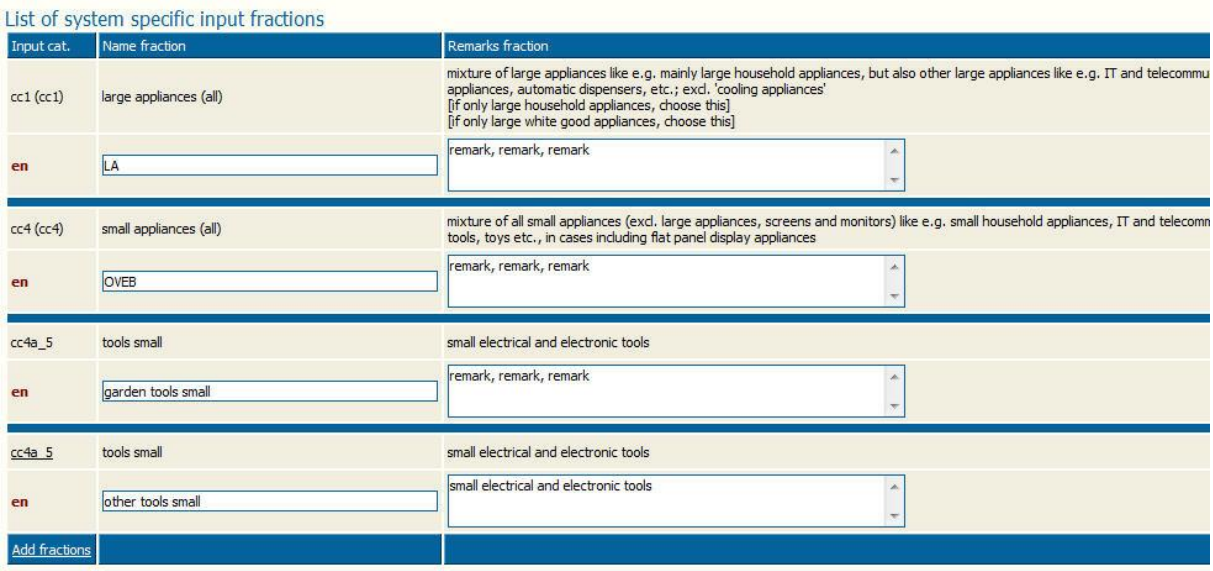

List of system specific input fractions

Input cat.	Name fraction	Remarks fraction
cc1 (cc1)	large appliances (all)	mixture of large appliances like e.g. mainly large household appliances, but also other large appliances like e.g. IT and telecommu appliances, automatic dispensers, etc.; excl. 'cooling appliances' [if only large household appliances, choose this] [if only large white good appliances, choose this]
en	LA	remark, remark, remark
cc4 (cc4)	small appliances (all)	mixture of all small appliances (excl. large appliances, screens and monitors) like e.g. small household appliances, IT and telecomn tools, toys etc., in cases including flat panel display appliances
en	OVEB	remark, remark, remark
cc4a_5	tools small	small electrical and electronic tools
en	garden tools small	remark, remark, remark
cc4a_5	tools small	small electrical and electronic tools
en	other tools small	small electrical and electronic tools
Add fractions		

Chart 7: More detailed input fractions (large & small tools) (NEW: additional field for national code under Input cat. number)

This gives the chance that the WEEE Forum may keep the background lists ('WF-RepLists') on the level of 'common needs' but you may adapt to 'your needs'.

3.2.4.3. Use only 'slim' pre-selection

Up to now (see points before) you have only given **new 'names'** or **more detailed fractions** (and **names**).

If you have done this for **all your fractions** you **want to provide** to your treatment partners / reporters, you may now decide that **only** this **'slim' list(s)** shall be used as a **first option**.

For this you have to activate the checkbox **'Use slim pre-selection'** (see Chart 3, page 4) and confirm this with using the **'Submit'** – button.

In this case your treatment partners / reporters will see this 'slim' list **first** when they go for choosing (find / filter) a fraction by using 'Search'. They still will have the chance to use 'Search all' for searching in the 'full' list of fractions (see 'user manual – reporter level').

3.2.4.4. System-specific background lists after update of background lists

It might happen that an entry in your system-specific lists is shown with grey background-colour. The reason for this is, that the fraction was marked as 'deleted' by the background lists update. Those 'deleted' fractions can't be used in the WF-RepTool any more (see 'user manual - reporter level').

If you still need this fraction, you should choose another fraction for your system-specific list, which comes closest to the deleted one (see delete arguments & delete advises in 'user manual - reporter level').

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3.2.5. Option for disclaimer

At the left side, lowest position of the 'Config' - page (see Chart 3, page 4) you as WEEE system / WF-RepTool access administrator may enter any disclaimer (e.g. "All information included in this document is confidential ..."). This text is added to all PDF- and Excel exports.

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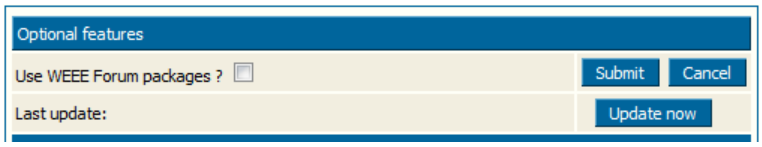
3.2.6. Decide about if WEEE Forum packages may be used

The WF-RepTool expert group creates '**WEEE Forum packages'** and provides them for download from the WF-RepTool server (see information regarding the use of WEEE Forum packages in the 'user manual – reporter level' 'Who may create a package', point 11.1.2 and points referred to).

It's up to you as the WF-RepTool administrator for 'your' WEEE system / company **to allow the use** of those packages or not. If you like to allow the use of those packages, go to the 'Config' - page (see Chart 3, page 4) to the right side 'Optional features', 1st position (see box below) and click the **'Use WEEE Forum packages?**' checkbox and press the '**Submit'** – button.



After this press the '**Update now'** - button below. With this you will **import** the WEEE Forum packages from the WF-RepTool server and they will be shown in the 'List of available packages'.

Additional or updated WEEE Forum packages might be provided in the future, so you should use this **'Update now'** - button from **time to time**.

WEEE Forum packages are always clearly marked with WEEE Forum package and a light-yellow bar in the 'Overview' of a report. They may **not be changed/edited** by the **reporter**[2] (see 'user manual – reporter level) except the 'Acceptor'.

Acceptors mentioned within a WEEE Forum package are **imported extra** to avoid mixing up with local companies/acceptors from your WF-RepTool installation. Those imported acceptors are only valid within WEEE Forum packages, they may not be inserted into other reports. They are also excluded from the 'Assign in summaries to' mechanism in the administration tool.

If **no acceptor** is given in the **WEEE Forum package** (e.g. unknown under entry 'other'), the user of the WEEE Forum package may **insert** the **name** of 'his' acceptor. This is the only exclusion how a WEEE Forum package may be edited.

The WF-RepTool administrator may **delete** WEEE Forum packages from the 'List of available packages' (see the 'user manual – reporter level' 'Delete a package'). With this option the WF-RepTool administrator may keep only selected WEEE Forum packages).

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[2] *see option to decide about if modifications of package data are allowed by the users / reporters, this option is not given for WEEE Forum packages even if this choice appears, the Submit – button is missing*

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3.2.7. Decide about 'Agent' feature ('Pro' only)

Based on given cases that some of the WEEE Forum member systems work with **'regional'** (or general) **contract partners**, the **'Agent' feature** was integrated to the WF-RepTool.

The **WEEE system** / WF-RepTool access administrator **decides**:

⇒ **if** the **'Agent' feature** will be **applied** under 'his' access or not and

⇒ if data of sub-contractors get **visible** to 'Agents' in general.

To **open** the 'Agent' option you have to enter the main menu point 'Configuration' ('Config') (see Chart 3, page 4 - 'Operational features', 2nd position, see box below) and **click** the **checkboxes** for:

⇒ 'Use agent feature?' - to allow this feature in general and

⇒ you may decide if 'Reports of sub-contractors visible to agents?' or not.

You have to confirm by using the '**Submit'** – button.

The WEEE system / WF-RepTool access administrator decides on **who may act** as 'Agent' and about the **'rights'** of each of the 'Agents' – please see point 3.5.3, page 26 for details & options.

For options to e.g. select and **filter** reports, do 'Summaries' for the 'Agent' etc. see different points in the 'user manual - reporter level'.

In the WF-RepTool WEEE operator 'small version' the 'Agent' feature is disabled in general as it makes no sense at all. In the WEEE operator 'big version' the operator may define any of his plants as 'Agent' (makes usually also not much sense, but there might be big organizations who need this feature).

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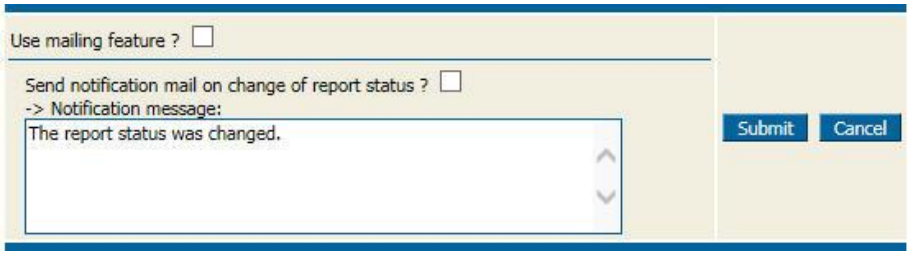
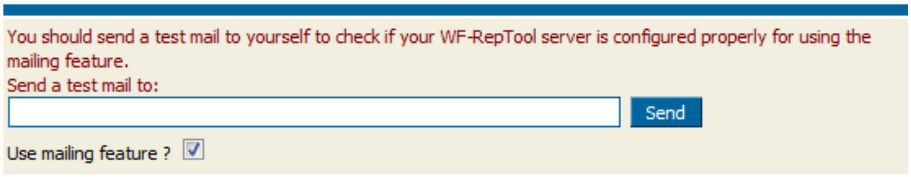
3.2.8. Decide about 'Mailing' feature ('Pro' only)

It is possible to send report related e-mails to your treatment partners. This feature may be activated under the main menu point 'Configuration' ('Config') (see Chart 3, page 4 - 'Operational features', 3rd position, see boxes below).

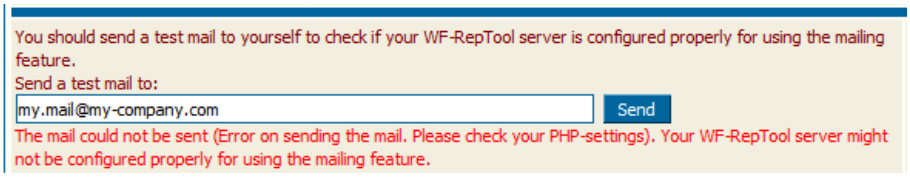
If you **want to use** it, click the checkbox '**Use mailing feature**?'.



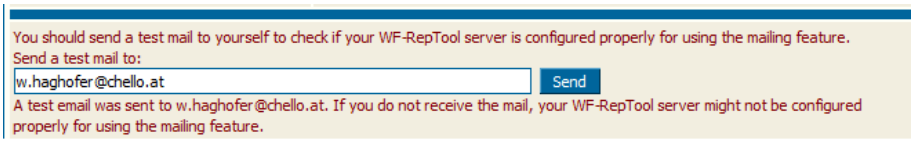
If you activate the 'Use mailing feature' – checkbox, this will fade in a field for generating a **test e-mail** (see box below). Enter your e-mail address in the field and press the 'Send' - button.



If you get an **error message** like shown in the box below, your WF-RepTool server is not able to send e-mails! Please contact your server provider to do the necessary steps (Tell him *"The PHP mail() function does not work"*).



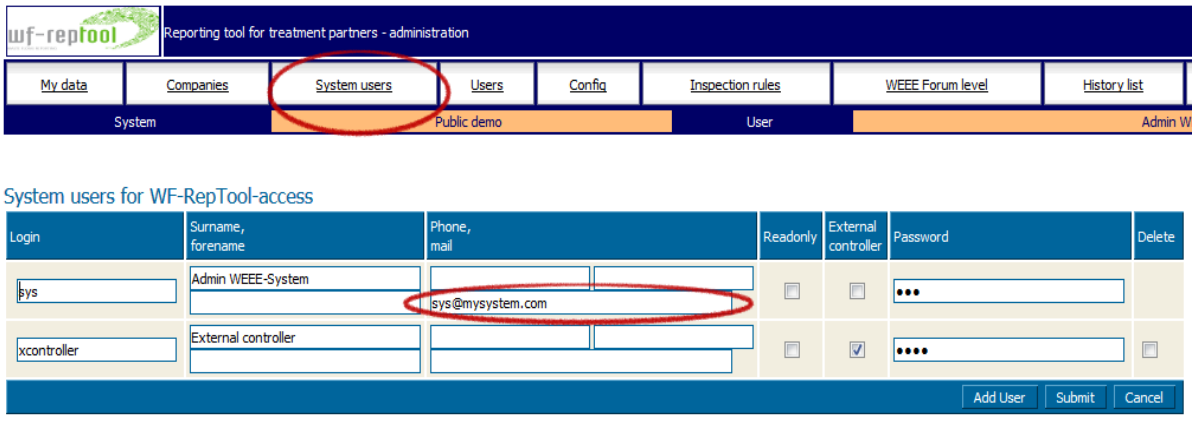
If you get the **confirmation** '*A test e-mail was sent to ...*' like shown in the box below, everything should be ok.



Nevertheless, it does not yet fully guarantee that sending e-mails from your server is really working. Only if you receive 'physically' an e-mail saying '*If you receive this mail, your WF-RepTool server is configured properly for using the mailing feature*.' under the e-mail you have mentioned, your server settings are ok and the mailing feature is fully working.

If you check the second option **'Send notification mail on change of report status?**', an **automatic notification mail** is sent from the user/s of the reporting company whenever he changes the status of a WF-RepTool report.

This feature needs the e-mail addresses of the system user/s whom this e-mail shall be sent. You must enter at least the e-mail address of **one system user** (see box below, see also point 3.3, page 17), otherwise you can't activate this option.



It's also quite beneficial, if you enter also the e-mail addresses for the user/s of your treatment partners, but that's not necessarily needed. The mailing feature contains a kind of self-learning mechanism, which collects the e-mail addresses on demand (see point 4.11, page 59).

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3.2.9. Decide about upload of attachments (‘Pro’ only)

An option to upload attachments has been integrated (‘Pro’ only). Please see the ‘user manual – reporter level’ for the limitation of file types.

If you are using a **hosted** WF-RepTool version, this feature is configured and activated automatically (see Chart 3, page 4 - ‘Operational features’, 4th position & see box below).

If you do not want to allow to upload files, please unclick the checkbox ‘Use file-upload?’ and press the ‘Submit’ – button to confirm.

If you have the WF-RepTool on your **own server**, you have to prepare things for this feature:

⇒ For the storage of uploaded attachment files, the WF-RepTool needs a **directory** with FULL ACCESS RIGHTS (create/modify/delete files and directories) for the web-server.

In case please contact your server provider for this (provide the following information). If you have any questions on this, please contact the WF-RepTool IT developer (see point 2, page 1 for this) for help.

- Although the names of uploaded files are obfuscated, for security reasons it is strongly recommended to place the directory outside the web-directory or to deny the direct access via the web by .htaccess directives.
- create this directory with full access rights for the web-server. If you place it outside the web-directory, please ensure also, that the access is not restricted by the "open_basedir" setting in PHP.INI
- Other PHP.INI settings to consider are (usually the PHP default settings are ok):
  - "file_uploads" -> must be "On"
  - "upload_max_filesize" -> if you increase it, ensure also that "post_max_size" is at least 1 MB higher than this
  - "upload_tmp_dir" and "max_file_uploads" -> see PHP manual

⇒ As step 2 enter the WF-RepTool admin tool and go to the ‘Config’ – page (see beginning of this point) and **activate** this feature by clicking the checkbox ‘Use file-upload?’.

- When you do this, an input-field for the upload directory will be opened, enter the path to the directory you've created and press the ‘Submit’ - button.
- On saving the WF-RepTool tries to create a sub-directory, create a file within this and delete the file again. If this works fine, the input-field for the directory will be hidden again to avoid modification of the path by mistake and the ‘Use file-upload?’ -checkbox stays checked.
- If you want to modify the directory later, just uncheck the ‘Use file-upload?’ - checkbox and check it again to bring the directory input into view. Be aware when modifying the directory, you have to move already uploaded attachment files manually to the new directory, otherwise they will be lost.

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3.2.10. Sampling results deleted/hidden

The menu option for '**Sampling results'** has been **deleted (hidden)** from the main menu of the reporter level (see 'user manual – reporter level', point 7). This was done on base of a decision of the WF-RepTool expert group as this feature was **not used**.

You may re-activate this option by clicking the checkbox for 'Use sampling results?' (see Chart 3, page 4 - 'Operational features', middle position, see box below).

Be aware that one of the planned main features to calculate target recycling & recovery rates for mixed input fractions is not applied at present (no update for model 2 as no need seen) so from the point of view of the developers it makes no sense to use this option.

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3.2.11. Decide about multiple use of reports

If a treatment operator works for two or more WEEE systems / companies, the input material might be the same or a very similar input. The feature of '**Multiple use of reports'** allows to **download** a full report from one server / WF-RepTool server sector and **upload** it on another server / WF-RepTool server sector. For options on how to use this feature, please see the 'user manual - reporter level' (point 5.7).

You as the WF-RepTool administrator may **decide** about **if** this **option may be used** under 'your' WF-RepTool access or not. This you do by **clicking** the **checkboxes** (see 'Config', Chart 3, page 4 - 'Operational features', middle position) as shown in the box below.

You have to confirm by using the '**Submit'** – button.

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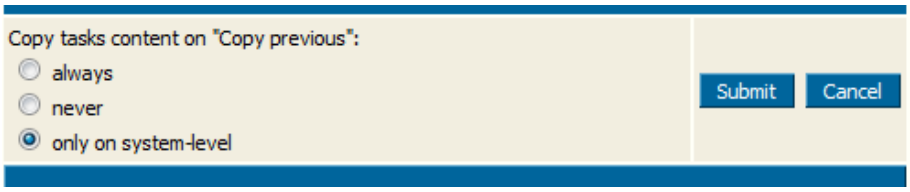
3.2.12. Decide about if task contents are taken over

The WF-RepTool administrator may **decide** by settings in the WF-RepTool configuration **if** the **task content/s** is/are **copied** with a report or not. For this go to the 'Config' - page (see Chart 3, page 4 - 'Optional features', middle position, see box below) and **chose** from the **options**:



- with '**always'** the task content is fully copied;
- with '**never'** the task content is not copied, but a new task is created which has to be filled out again by the task receiver;
- with '**only on system level'** the task content is fully copied, if a system user creates the report copy; if a treatment partner creates the report copy, it's the same as with 'never'.

You have to confirm by using the '**Submit'** – button.

This option only applies to report copies created via 'Copy previous', for translation copies and summary reports ('Pro' only) the task content is fully copied.

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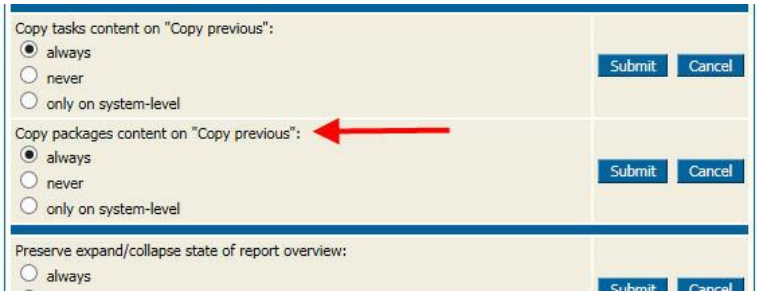
3.2.13. NEW18 Decide about if package contents are taken over

The WF-RepTool administrator may **decide** by settings in the WF-RepTool configuration **if** the **package content/s** is/are **copied** or not.

For this go to the 'Config' - page (see Chart 3, page 4 - 'Optional features', middle position, see box below) and **chose** from the **options**:



- with '**always'** the package content is copied;
- with '**never'** the package content will not be copied;
- with '**only on system level'** the package content is copied, if a system user creates the report copy; if a treatment partner creates the report copy, the package content will not be copied.

You have to confirm by using the '**Submit'** – button.

In any case the package / package content will **not** be **copied** if the package is **expired** (see package information point 11.3.1 'user manual – reporter level').

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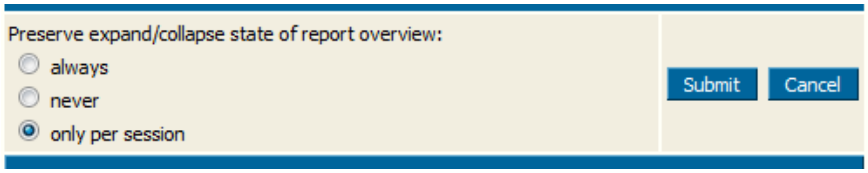
3.2.14. Decide about the collapse/expand state of report overview

The option to collapse (minimise) and expand (enlarge) the treatment tree in the report 'Overview' is foreseen (for the use see 'user manual – reporter level', point 3.2.5). The collapse/expand status is preserved during the browser session (until the reporter logs out from the WF-RepTool use).

You as the WF-RepTool administrator may do relevant **setting** to **keep** the **chosen status**. For this go to the 'Config' - page (see Chart 3, page 4 - 'Optional features', lower position, see box below) and **chose** from the **options**:



- with '**always'** the collapse/expand status '**survives'** the browser session (if the reporter logs in the next time, he will find the same status as it was before the last logout),
- with '**never'** the collapse/expand status is **not preserved** at all (each time you go to the 'Overview' it presents itself fully expanded),
- '**only per session'** is the default setting like described above.

You have to confirm by using the '**Submit'** – button.

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3.2.15. Decide about sorting of OUTPUT fractions

You as the WF-RepTool administrator may decide about the **defaults value** for the **sorting of OUTPUT fractions** in all choices for OUTPUT fractions (see 'user manual – reporter level' e.g. point 2.3.2 resp. 2.3.2.2) (see Chart 3, page 4 - 'Optional features', low position, see box below). You may do this by clicking the checkboxes.

The first = installation setting is a sorting to the '**material group'** but you may adjust based on your preferences and/or the preferences of 'your' reporters.

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3.2.16. Report groups ('Pro' only)

For those who have to deal with **a lot of report**s or if you want to **structure** your reports in any specific way, the WF-RepTool provides the option to group reports into **self-defined 'groups'.**

You as the WF-RepTool administrator may **define 'report groups'** (e.g. report data , test data, data from north region, data from sount region etc.). For this go to the 'Config' - page (see Chart 3, page 4 - 'Optional features', lowest position, see box below).

If you do this, 'your' reporters will see a *scroll-down* selection for the groups of reports ('**Group'**) at quite some pages to report (most time beside 'Kind of data remarks'). You might give them an **advise which** group/s to choose.

To define your 'Report groups' following fields are available:

- the '**Sort'** - field can hold any number and fixes the **order** in which 'your groups 'are appearing for the choice by the reporter;
- the '**Name'** - field is the name of the group,
- the '**Remarks'** - field you may use for information.

Please press the '**Submit'** – button to transfer your grouping to the database.

As mentioned, your reporters will get an additional choice to group reports and you as WF-RepTool administrator will have the additional selection box at many pages like e.g. 'Summaries', 'Compare' etc. to select and group reports for results.

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3.3. System users

To define the **WF-RepTool users** at **system level** (e.g. staff working within or on behalf of your WEEE system / company) you have to choose the main menu option '**System users'** (see Chart 8).

'System users' will **see all data** from all treatment partners / reporters and they may **change** nearly **all information** about or in reports (see chapter 4, page 36).

You may **add** users by using the 'Add User' – button in the bottom line (see Chart 8) and you may insert all data like shown. **At least** you have to give the 'System user' a **login & password** and to confirm by using the 'Submit' – button. We recommend you to keep any *'red book'* where you note passwords given.

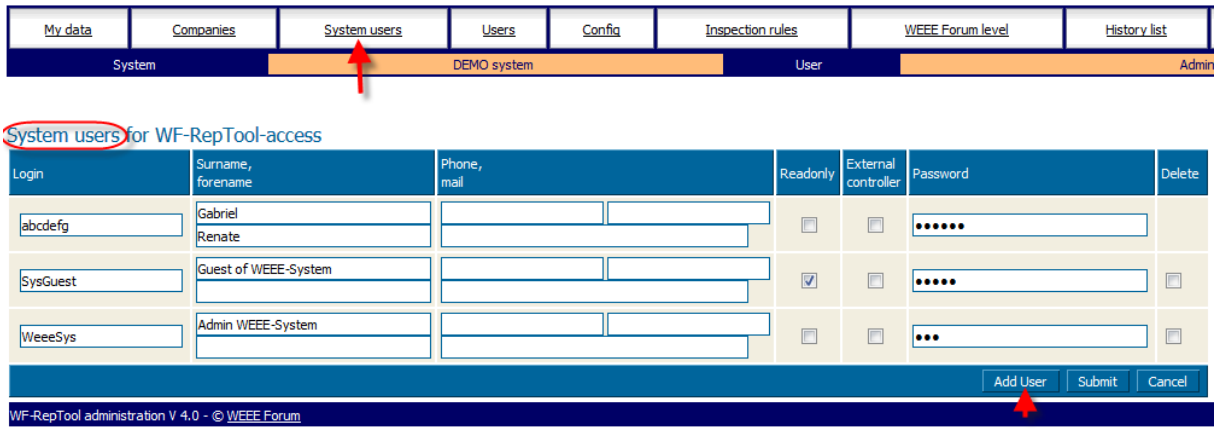

Chart 8: Users at System level

If you want to use the mailing feature (see points 3.2.8, page 11 and 4.10, page 52), you have to insert the **e-mail address** of those system users to whom e-mails should be sent (e.g. by WF-RepTool expert of the WEEE system+/- controller (see below) – see 2nd line for 'mail'.

Users are sorted to **alphabetic order** of the **login** provided. The forename and surname will be shown in the menu header when having logged in.

You may **change / edit** logins & passwords at any time by **overwriting** them with new contents. You have to confirm by using the **'Submit'** – button.

You may **delete** users at any time by activating the '**Delete'** – checkbox at the very right side and confirming by using the **'Submit'** – button. You will see that **at least one** (1st in list) will **not** have any 'Delete' – checkbox. This has been foreseen to make sure that at least one user at system level will stay[3]. You have to **keep at least one system user!**

The 'system user' foreseen by installation (see Admin WEEE-System) you should overwrite (the name) and **change** the **login & password** from 'initial data' provided.

If you want to give additional persons the chance to **look** at data but **not to change data**, you may define them as explained, but you also activate the **'Read-only'** – checkbox (see 'Guest').

Additionally the user role as '**controller'** has been introduced for external auditors doing the control of reports (see controller tools - point 4.9, page 45). This role gives the right to add, modify and delete **controller remarks** and to read reports, but not the right to modify reports. For applying this role to a user you will find the additional checkbox 'External controller' on the 'System users' - page (see Chart 8).

[3] *If you want to delete this 'first line user', change the login first to start with e.g. x,y,z ..., submit and you will see him at a 'deleteable position'*

All features are the same if you purchased the WF-RepTool as **WEEE operator version.** 'System users' may manage reports for all plants. Additionally, 'reporters' shall be defined for each plant (see point 3.4 following).

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3.4. Plants

If you have purchased the WF-RepTool as **WEEE operator version** and you use the main menu button **'My data'** (see point 3.1, page 3) you come to a **'list of plants'** you cover with your company (or those ones you want to report with the WF-RepTool) (see Chart 2, page 3 – lower area, see Chart 9 below). The number of plants you may list here is limited by the WF-RepTool version you bought, in case that you bought the 'small operator version', you may only list one plant (see www.wf-reptool.org/Purchase/Pricing);

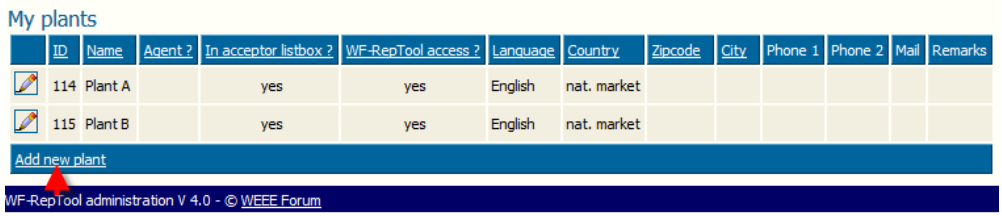

Chart 9: List of plants

If you choose one plant with the - button in the 'list of plants', you will come to the 'Edit plant' – page (see Chart 10) where you give information about your plant (same like for treatment partners – see Chart 12, page 22). You may add new plants by using the 'Add new plant' – button in the bottom line of the 'list of plants' (see Chart 10). You will come to the same page like the 'Edit plant' – page but with the headline 'New plant'.

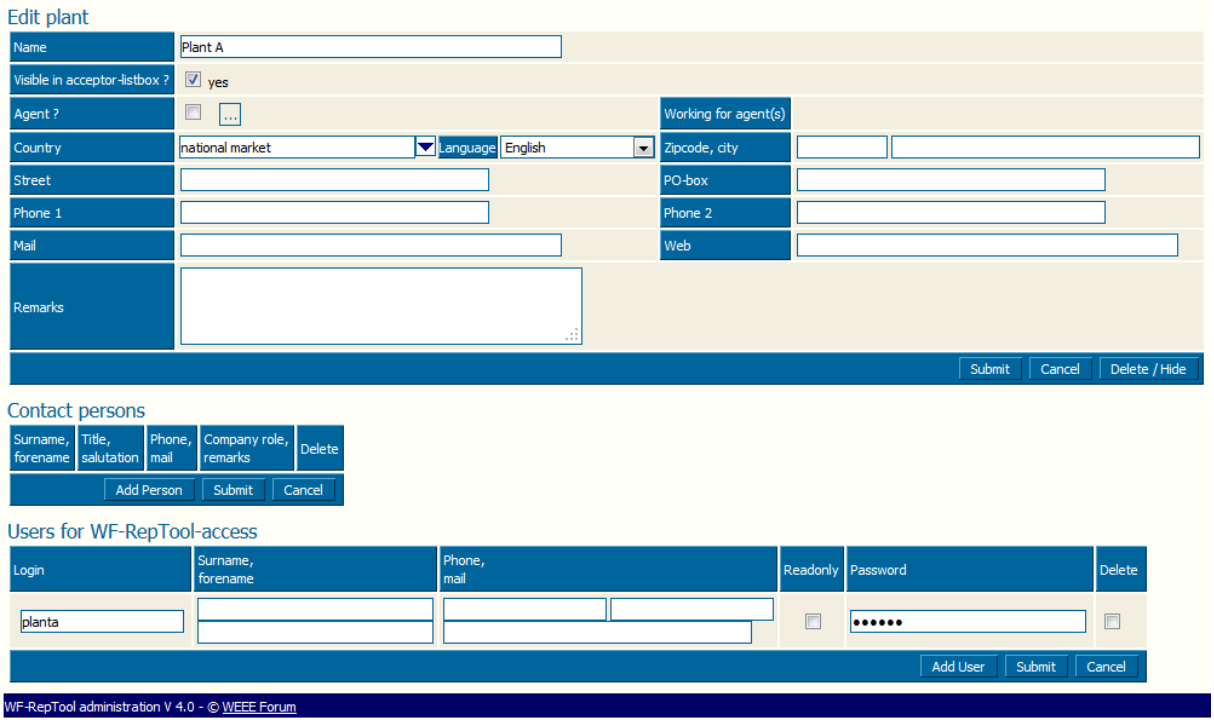

Chart 10: Edit plant

In the bottom area of the 'New/Edit plant' – page you may assign contact persons and 'users for WF-RepTool access'. The 'users for WF-RepTool access' are the '**reporter/s' for the plant**. You may give this/these 'reporter/s' access to the WF-RepTool like explained for treatment partners under point 3.5.2.5, page 25).

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This principle also applies to the WF-RepTool WEEE operator 'small version' because of two main reasons:

- it allows the operator to define different roles within his organization, e.g. the 'boss' as system user with all rights and/or playing the 'controller'-role and any employee(s) playing the 'reporter'-role;
- it keeps the option of later upgrading to an operators 'big version'.

Important: Reports may only be generated for **plants** of the WEEE operator!

'Regular'/'other' treatment partners (see next point 3.5) are in this case only acceptors of 'your' OUTPUT fractions and may in case fulfil tasks (with new data or their packages) (see user manual – reporter level).

For operators with the WF-RepTool WEEE operator 'small version' their one and only plant is automatically assigned to all new reports.

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3.5. Companies = Treatment partners

Under the main menu button 'Companies' **all treatment operators** registered by you as WF-RepTool administrator and all **personal acceptors** of the treatment operators are shown when you are logged in as system user.

To avoid misunderstanding: this is only valid for system users, in the reporters and agents view personal acceptors of other treatment operators will not be shown.

All features are the same if you purchased the WF-RepTool as **WEEE operator version**. The button 'Companies' will be called 'treatment partners'. As WF-RepTool administrator or 'system user' of the WEEE operator you may define treatment partners which are acting for (i.e. taking over OUTPUT fractions from) all of your plants as well as specific 'personal acceptors' acting for one specific plant.

3.5.1. Recommendation – register all relevant treatment partners!

We recommend you to **register all relevant treatment partners** of your **country** respectively all next steps treatment partners **well known** in your country **first** (by the WF-RepTool administrator).

These treatment partners added by you as WF-RepTool administrator will be **visible to all** your treatment partners who shall report via the WF-RepTool in the choice (*scroll down*) for acceptors. They = treatment partners

- may **choose** the correct name from the beginning,
- **don't** have to **write** them (e.g. under 'other') or
- **don't** have to **create** them by themselves as 'own' 'personal acceptors'.

The **big advantage** is that these treatment partners will **not** be **listed several times** in your list of companies / users (e.g. different names used for same company). This might be the case if several of your treatment partners create them as 'own' 'personal acceptors' (see also 'user manual – reporter level e.g. point 2.5.2.2.).

See point 3.5.4, page 30 for options to work with 'double names' given for companies.

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3.5.2. How to register a treatment partner

To register treatment partners you have to use the main menu button '**Companies**'. If you have purchased the WF-RepTool **as treatment operator**, the menu button is called 'Treatment partners'.

3.5.2.1. List of treatment partners & add new treatment partner

By choosing 'Companies' or 'Treatment partners' (for the WEEE operator version) you will first come to the 'List of treatment partners' (see Chart 11).

When entering, treatment partners are sorted to **alphabetic order**.

You may **sort** the 'List of treatment partners' by using the **underlined** headline entries. Your selected sorting stays active until you choose another sorting or you press the 'Clear' – link in the bottom line of the Find/filter block.

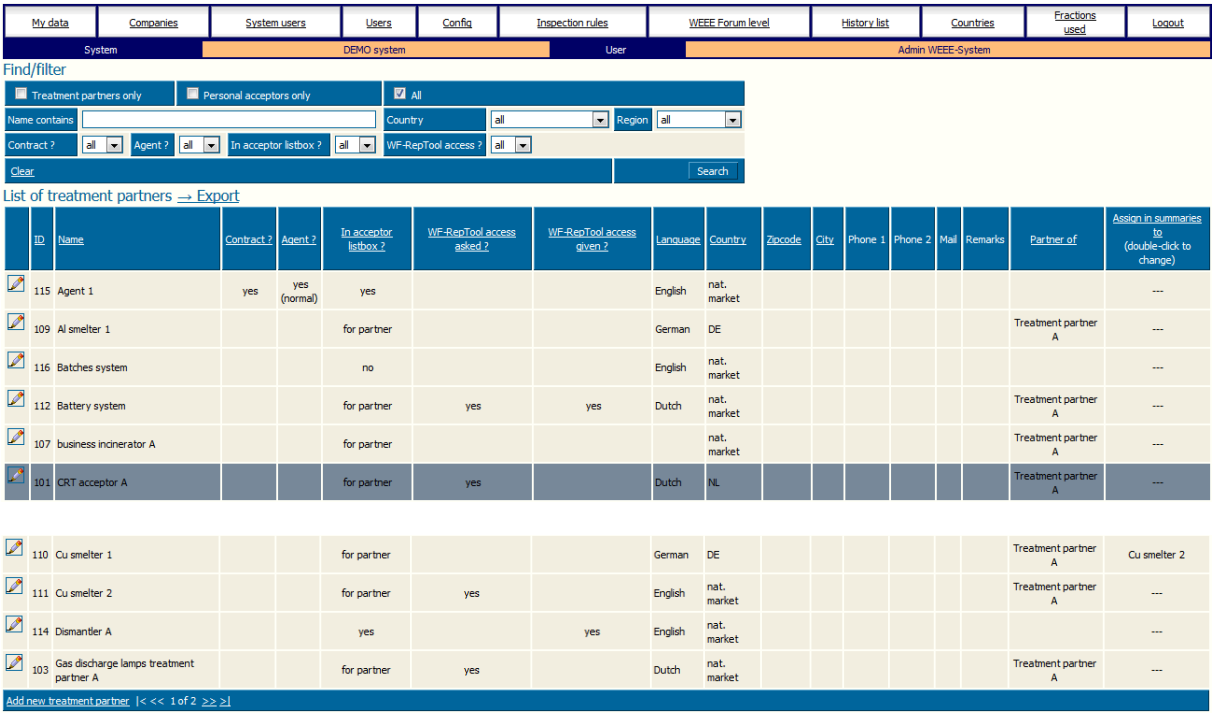

Chart 11: List of treatment partners

In the upper area of the 'List of treatment partners' you will find a **find/filter** block.

You will have the **main option** to search for the **name** (also part of the name) of treatment partners (see find / filter in Chart 11 'Name contains').

You may also choose the **country** (given by registration, see point 3.5.2.2) or the **market region** ('Region', see also market regions in 'user manual - reporter level').

Additionally, you will have **checkboxes** to **search** for (see first line of find/filter block):

- **Treatment partners** only (treatment operators you have registered as system user),
- **Personal acceptors** only (personal acceptors of your treatment partners) or
- '**All'** = both of them.

Or (see 3rd line of find/filter block) you may also **filter** for **entries** from **additional columns** like 'Contract?', 'Agent? ('Pro' only)', 'In acceptor listbox?', 'WF-RepTool access?' – see information on the use under point 3.5.2.2, starting with page 21).

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The find/filter block **remembers** your **last selection** when switching between pages. Also, the selected order and page number of the 'List of treatment partners' is preserved. To change from this preserved selection criteria, press the 'Clear' - link in the bottom line of find/filter block.

To **create = add** a new treatment partner you may use the button 'Add new treatment partner' in the bottom line of the 'List of treatment partners ...' (see Chart 11) → continue like explained in point 3.5.2.2.

As system user you may **edit** information on **all treatment partners**, also those from personal acceptors.

The 'List of treatment partners ...' contains following columns (see information on the use under point 3.5.2.2 following):

- a fist column with the - button (see Edit' – function point 3.5.2.3, page 23),
- internal company – ID - quite useful if you use WF-RepTool data in external programs,
- Name, Contract?, Agent?, In acceptor listbox ? (see point 3.5.2.2),
- WF-RepTool access asked? – a 'yes' entry shows that the treatment partner has asked for WF-RepTool access e.g. for sending a task (see user manual – reporter level),
- WF-RepTool access given? - a 'yes' entry shows if you have created a WF-RepTool access for a treatment partner (see point 3.5.2.6),
- Language, Country (see point 3.5.2.2),
- 'Partner of' - this shows who (which treatment partner) has created this company,
- 'Assign in summaries to' - see 'summary companies' point 3.5.4, page 30.

You may **export** this list via the Export feature (see Export in the headline of the list, Chart 11) and you will get it as an Excel file.

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3.5.2.2. (First) Information on treatment partners

Having chosen the 'Add new treatment partner' – button you will come to the **'New treatment partner'** - page (see Chart 12) where you shall give information on the treatment partner. If you create a new treatment partner, the **system country** and **system language** will be proposed by default values of your WEEE system / WF-RepTool access administration.

At least you have to (see Chart 12 red circles):

⇒ give the treatment partner a **name** (take care: **correct name** of the company, in case two treatment partners with **two different names** if they run **two plants**),

⇒ to **choose** the **country** where the treatment partner (the plant) is located (see '*Information on the market region for acceptors'* in the 'user manual –reporter level'),

⇒ to **choose** in which **language** he will **report** (choose from the *scroll down* 'Language')

If you **choose** any **language** here, the **menu** for the WF-RepTool as well as the background data (e.g. 'WF-RepLists') will be provided to the treatment partner / reporter in this language. ***Take care:*** reports will be shown in this language to you at system level. So, you might be strict to ask treatment partners to report in 'your' language (WEEE system / company language) only.

If you allow your treatment partner to report in 'his' language' there are **two translation features** given (see 'user manual – reporter level'):

- a **copy/paste feature** for a report – see **translated reports** point 2.9, this option you might use to do / get able to do a control of the report,
- '**Summaries'** are automatically done in the system language used.

In both cases there is the 'disadvantage' given, that only names, terms etc. given by the WF-RepTool 'background lists' ('WF-RepLists') translated based on the internal 'ID's of the program. Any internal names for fractions, technologies etc. or remarks done will not be translated.

If you use here any **language not installed** up to now, the English language will be automatically chosen (but you have e.g. done a pre-selection for the future when 'this' language will be available).

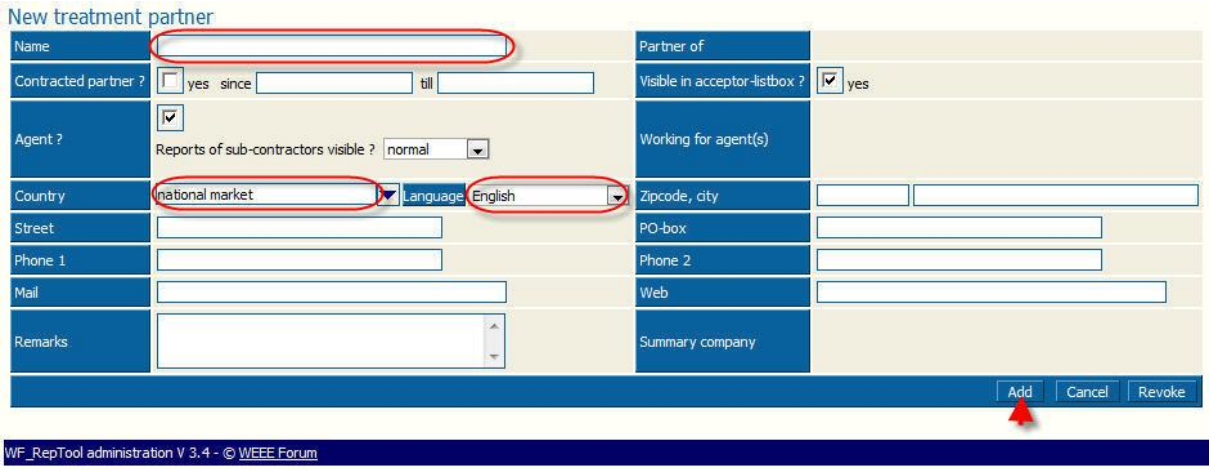

Chart 12: Add treatment partner - information on 'New treatment partner' (NEW: line available. Technology – not relevant here)

Following fields have to be filled and/or chosen:

- **Partner of** – not available, under the 'Edit' – function you will see information by **whom** the treatment partner was created;
- **Contracted partner?** - 'yes' (checkbox), 'since', 'till' are additional information about the case if treatment partners are **direct contract partners** of the **WEEE system**[4], information have no effect on any listbox in the WF-RepTool, but allow you to filter or sort on 'yes'<>'no' in the 'List of treatment partners' (Chart 11, page 20);

> ***Be aware:*** *standard value for all partners you have already created in the 'Admin tool' before WF-RepTool version 3.4 is 'yes' → you might check if information is correct +/- edit information (the checkbox setting – see point 3.5.2.3), for all 'personal acceptors' it is 'no' as pre-setting.*

- **Visible in acceptor-listbox?** with this choice you may decide about, that 'special' treatment partners[5] are visible to you as 'system user' only and are not shown in the WF-RepTool acceptors selection, if you click the checkbox (means 'yes'), treatment partners will be shown in WF-RepTool acceptors selection to all treatment partners having WF-RepTool access;

> ***Be aware:*** *standard value for this is 'yes' → you might check if information is correct +/- edit information (the checkbox setting – see point 3.5.2.3), for all 'personal acceptors' it is 'no' as pre-setting ('for partner' in 'List of treatment partners') but may be edited if agreed with treatment partners having created this treatment partner.*

[4] *not relevant/foreseen for WEEE operator version*

[5] *any 'arificial' treatment partners you created for your own purposes – e.g. batch results*

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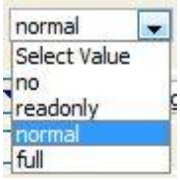
- **Agent?** – here you choose in the checkbox, if any treatment partner **acts** as '**Agent'**. In an additional scroll down ***'Reports of sub-contractors visible?***' you decide about the '**rights'** of the 'Agent' – see box beside, for all further information see point 3.5.3, page 26. ('Pro' only);



- **Working for agent(s)** – not available, under the 'Edit' – function you will see information for which 'Agent(s) the treatment partner is working for (see point 3.5.3.3, page 27). ('Pro' only);
- **Country** – here you may choose where the treatment operator is **working** (take care: for international acting companies please choose the **location** of the **plant**, not of the administrative centre).

  Pre-setting is the '**national market'** – this means the country where the **WEEE system** / WF-RepTool access administrator is **located** (demo version: Belgium).

  Countries are assigned to regions in the background lists (see also market regions in 'user manual - reporter level'). You may add more countries to the choice of 'outside EU / EFTA – see point 3.8, page 34.
- **Language** – here you choose which language the treatment partner may use - see information above;
- **Address** and **contact information** should be clear;
- '**Available technologies'** – not available for registration at system level = by the WEEE system / WF-RepTool access administrator (see 'user manual – reporter level' point 2.5.2.6). Background: one treatment partner may treat different input streams at the same plant site, so an assignment of any (pre-treatment) technology is not applicable;
- **Remarks** – here you may give any remark on the treatment partner;
- **Summary company** – not available, under the 'Edit' – function you will see t**o whom** the treatment partner is assigned to - see 'summary companies' point 3.5.4, page 30.

If you have **finished** the data input on the information about a treatment partner, you have to use the **'Add'** – button to take information over to the 'List of treatment partners'.

You may use the **'Add'** – button also after having given information partly and continue with the 'Edit' – function afterwards (see point 3.5.2.3 following).

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3.5.2.3. Edit information on treatment partners

By using the - button very left in the 'List of treatment partners' (see Chart 11, page 20) you will come to the 'Edit treatment partner' - page (see Chart 13) and you may adapt = **edit all information** except:

- **Partner of** – not to be changed, you will see **who** has **created** the treatment partner, empty when you as the WEEE system / WF-RepTool access administrator did.
- **Working for agent(s)** – not to be changed, you will see **for which 'Agent(s)** the treatment partner is working for (see point 3.5.3.3, page 27). ('Pro' only);
- **Summary company** – not to be changed you will see t**o whom** the treatment partner is assigned to - see 'summary companies' point 3.5.4, page 30.

You will have to **confirm changes** by using the **'Submit'** – button (see Chart 13, green arrow).

For **deleting**/hiding the treatment partner (see Chart 13, red arrow) see point 3.5.5, page 31.

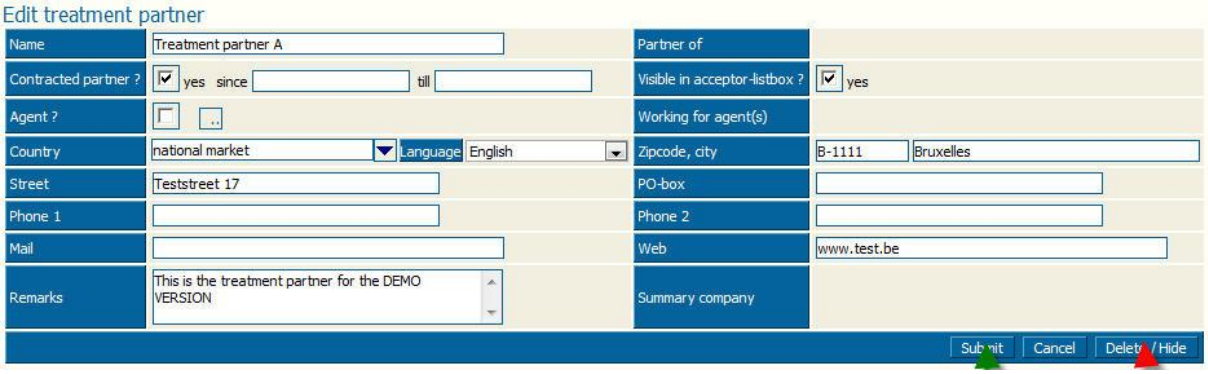

Chart 13: Edit information on treatment partner incl. 'Delete' option ((NEW: line available. Technology –not relevant here)

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3.5.2.4. Information on contact persons at treatment partners

If you choose a treatment partner like explained in point 3.5.2.3 before, you will see in the **lower area** of this page the option to give **information** on a/the **contact person/s**.

It's your decision if you include information on contact persons or not.

If you want to do so, you have to use the '**Add Person'** – button under 'Contact persons' (see Chart 14). You will come to a list of contact information provided (see Chart 15).

Chart 14: Treatment partner – contact persons – empty

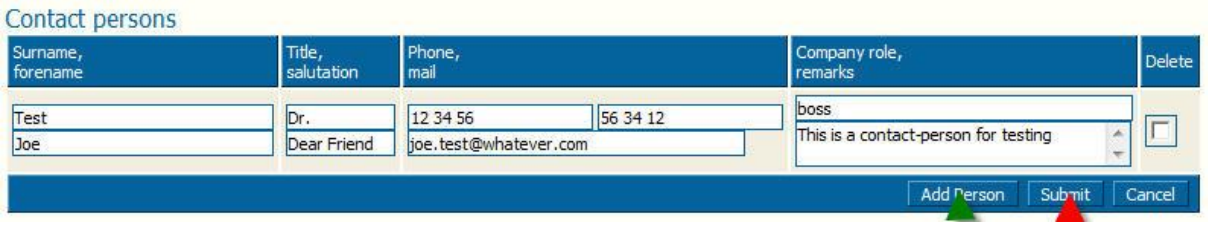

Chart 15: Treatment partner – contact persons – information

If you have **finished** information on a contact person, you have to use the **'Submit'** – button to confirm and transfer information to the database.

You may also include **several** contact persons. For this you just have to use the **'Add Person'** – button again and go ahead like explained.

You may **delete** contact persons by using the **'Delete'** – checkbox at the very right side and confirming with the **'Submit'** - button.

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3.5.2.5. Give & stop treatment partners WF-RepTool access

If you choose a treatment partner from the 'List of treatment partners' (see point 3.5.2.3, page 23), you will see in the **lower area** of this page the option for providing the treatment partner **access** to the **WF-RepTool** ('Users for WF-RepTool-access', see Chart 16). You just have to use the '**Add Users'** – button (see Chart 16) and you will come to user's information (see Chart 17).

For providing a treatment partner access to the WF-RepTool you have to provide to him **at least** a **login & password** (see Chart 17', red wide circles). You may add other information.

We recommend *'keeping a red book'* for logins & passwords.

Chart 16: Treatment partner – users for WF-RepTool access

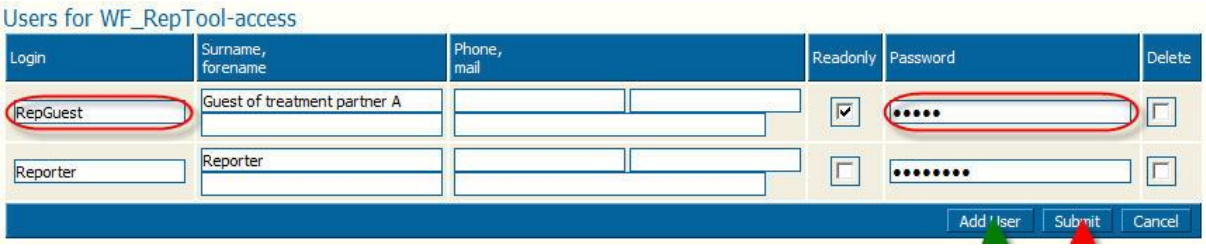

Chart 17: Treatment partner – users for WF-RepTool access, login & password

If you want to use the **mailing feature** (see point 3.2.8, page 11 and point 4.11, page 59), you should also add his e-mail address (see 2nd line for 'mail).

If you have **finished** information on a user, you have to use the **'Submit'** – button to confirm and transfer information to the database.

On request of your treatment partner you may also register **several users** per treatment partner. For this you just have to use the '**Add Users'** – button and go ahead like explained.

There is also the option to insert additional persons giving them the **chance to look** at data but **not to change data**. For this you have to activate the **'Read-only'** – checkbox.

You may **stop access** to the WF-RepTool for **a user** or **all users** of a **treatment partner** (e.g. the person left the company, you stopped to cooperate with a company) by using the **'Delete'** – checkbox at the very right side and confirming with the **'Submit'**- button.

See option to **delete** the **treatment partner** under point 3.5.5, page 31.

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3.5.2.6. Register / give WF-RepTool access on demand of any treatment partner

If your treatment partner has 'created' his 'own' 'personal acceptors' and he activates the *'Shall get WF-RepTool access'* - checkbox when he creates/edits any acceptor (see 'user manual - reporter level', point 2.5.2.6), he **announces** the **'wish'** that you shall give this treatment partner = acceptor **WF-RepTool access**.

You will see this treatment partner at 'your' 'List of treatment partners' (see Chart 11, page 20) with an entry of 'yes' under 'WF-RepTool access asked?'.

There is **no warning system** that you **have to give WF-RepTool access** to any dedicated treatment partner, you just will see it in the column 'WF-RepTool access asked?' and you may sort this column for access requests ('yes').

In the column 'WF-RepTool access given?' you will see if you have already given access.

Hint: sort for 'WF-RepTool access asked?' to see quickly where WF-RepTool access registration is missing.

*Remark: See 'user manual – reporter level': we have given the **advice** that the treatment partner has to **inform** the WF-RepTool administrator of the WEEE system / WF-RepTool access administrator directly (parallel) about his 'wishes' regarding registration = getting WF-RepTool access for acceptors / treatment partners.*

If you identify / get information about the **need** of **giving** a treatment partner WF-RepTool **access**, follow instructions like given in point 3.5.2.5 before to provide access.

Consider that **setting a task** by a treatment partner (see 'user manual – reporter level') will **only** be possible **if** the treatment partner who shall get the task handed over has got **WF-RepTool access**. So please check needs from time to time or act on requests of your treatment partners.

In the 'List of treatment partners ...' (see Chart 11, page 20) in both columns 'WF-RepTool access asked?' and 'WF-RepTool access given?' a 'yes' must be given that a task may be set.

If the treatment partner has forgotten to ask for WF-RepTool access for his/this partner (the acceptor of the fraction to whom he wants to hand over a task), he has to edit this (see '*Shall get WF-RepTool access'* – checkbox, see 'user manual - reporter level', point 2.5.2.6, version Jan2014).

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3.5.3. To work with the 'Agent' feature ('Pro' only)

The **WEEE system** / WF-RepTool access administrator **decides if** the **'Agent' feature** will be **opened** or not and if **reports get visible** to 'Agents' in general or not (see point 3.2.7, page 11).

Additionally, the WEEE system / WF-RepTool access administrator decides on **who may act** as 'Agent' and about the **'rights'** of each of the 'Agents' – see following sub-points.

3.5.3.1. Create or choose an 'Agent'

For creating an 'Agent' you may **choose** an **existing** treatment partner as 'Agent' or you may **create** a **new** treatment partner as 'Agent' (see point 3.5.2, page 20 for a new one).

To select a new 'Agent' click the ' - button at the left side of the company at the 'List of treatment partners (see Chart 11, page 20). You will come to the 'Edit treatment partner' - page where you will find the checkbox 'Agent?' below the 'Name' (see Chart 13, page 24).

If you click the 1st **checkbox** for 'Agent?' you will get additional choice for *'Reports of sub-contractors visible?*' (see Chart 18) and you have assign the **rights** for the 'Agent' (see next point 3.5.3.2).

Chart 18: Choose treatment partner as 'Agent'

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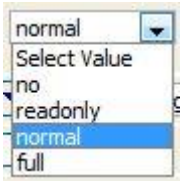
3.5.3.2. Options for 'Agent' rights

Options for the **rights** of the 'Agent/s' *('Reports of sub-contractors visible?'*) are (see box beside):



- **'no'** = no rights for the 'Agent', reports will only be **assigned** to the 'Agent', the WEEE system / WF-RepTool access administrator may do e.g. 'Summaries' on 'Agents',
- **'read only'** = the 'Agent' may only see reports from its sub-contractors,
- **'normal'** = the 'Agent' may **see reports** from its sub-contractors and may **do changes** in the reports but may not see details like e.g. 'packages' (see point 3.5.3.4, page 28). The 'Agent' is not allowed to create new reports for the sub-contractor,
- **'full'** = the 'Agent' may **see** and **change** all reports of the sub-contractor assigned to him and may even **do reports** instead of the sub-contractor. The 'Agent' may see all **packages** and **sampling results** of the sub-contractor (see point 3.5.3.5, page 29).

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3.5.3.3. Assign sub-contractors

After having created/chosen an 'Agent' and having given rights to him (you may also edit later) you will have to **assign sub-contractors** (treatment partners) to the 'Agent'. This you will do by using the - button beside the 'Agent?' - checkbox (see Chart 18).

Remark: if you create a new agent company and want to assign sub companies immediately, you just have to enter at least the name of the agent and press 'Submit' once, before this '...' - button gets available.

At the following 'Agent' - page (assignment window) you will find the 'Agent' company chosen already selected on the left side in the upper area (see Chart 19).

On the right side you will see the **sub-companies** that have already been assigned (empty at the start).

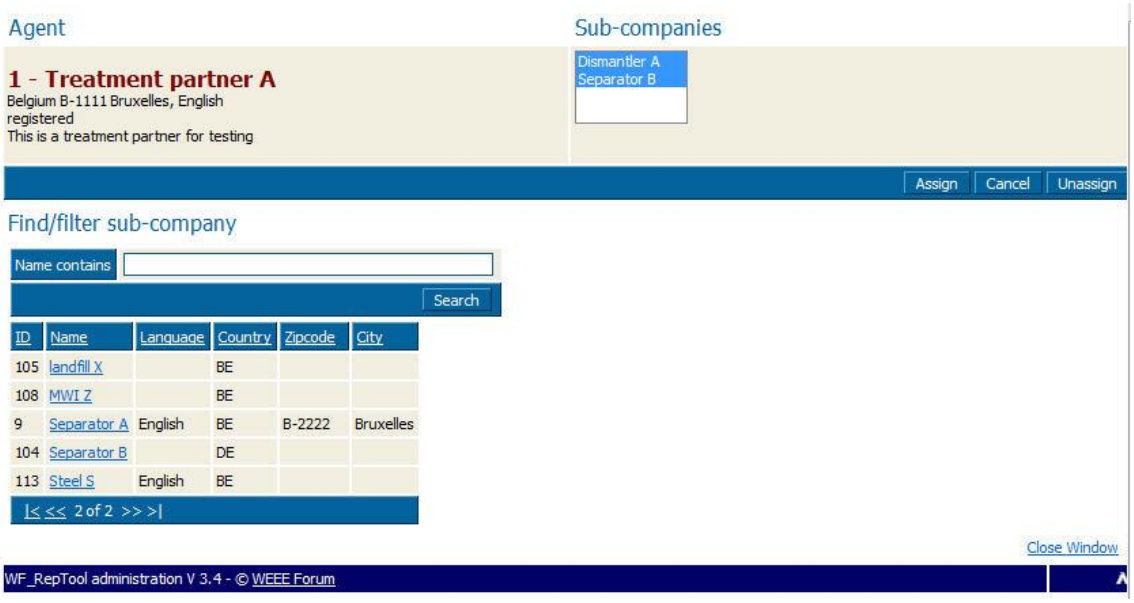


Chart 19: Assign sub-contractors to 'Agent'

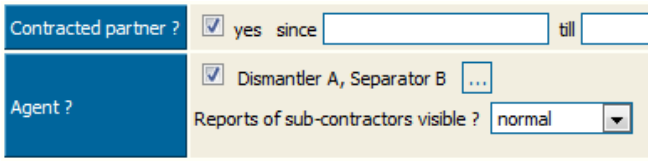
You may **choose sub-contractor companies** by e.g. using the 'Find / filter sub-company' option and - when you found him - finally clicking the **underlined name**. The company will be selected and shown in the right upper side selection box 'Sub-companies'.

Press the **'Assign**' - button (necessary!) and the selected company becomes a sub-company = sub-contractor of the 'Agent' company.

Press the **'Cancel'** - button to reset the selection or the **'Close Window'** - link to leave the assignment window.

The assignment window is designed to allow you doing **more** assignments quickly (assign more sub-companies to an 'Agent'). Instead of leaving the window with 'Cancel' / 'Close Window' after having done a 'wrong' search, search the (next) sub-company you are looking for with putting (parts of) the name into the 'Find / filter sub-company' – option. If you found 'him', click the name and click the '**Assign'** – button again.

The assigned sub-companies will be shown in the Agent field beside the Agent checkbox – see box beside.



For the case that you have to **remove sub-contractors** from 'Agents', choose the 'Agent' from the 'List of treatment partners' (see Chart 11, page 20) with the 'Edit' – button and use the - button beside the 'Agent?' - checkbox (see Chart 18). Choose the sub-contractor to be removed from right upper area for sub-companies and use the **'Unassign'** – button. Use this option also to solve an assignment done **by mistake**.

Be a little bit **careful** with this 'Unassign' – button, as usually all sub-companies are selected (hopefully) by any good reason. If you press the 'Unassign' - button **without** having clicked any dedicated **sub-company**, you will get the warning *'You have selected multiple sub-companies. Do you really want to remove them all?'*. If you ignore this warning and just use 'Ok', all sub-companies will be removed from this 'Agent'.

Agent <> sub-companies **relations** are **unlimited**. A sub-contractor might be at the same time an agent for others, even vice-versa-relations are possible (e.g. being 'Agent c' for cooling & freezing appliances for e.g. a big area and having sub-contractor x for any dedicated area, this sub-contractor x may be the 'Agent x' for large household appliances and the 'Agent c' for cooling & freezing appliances works under his 'Agent x' – umbrella).

When the sub-contractor is creating a report, he may assign the report to an 'Agent'. He might e.g. 'parallel' do his own 'direct' reports to the WEEE system / WF-RepTool access administrator.

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3.5.3.4. Extension of 'Agents' rights to get access to reports

The right **'normal'** (see general options of rights for 'Agents' under point 3.5.3.2, page 27, consider that only you as the WEEE system / WF-RepTool access administrator decide about rights for 'Agents') gives the 'Agent' the **same rights** on reports of their sub-contractors as you have them on '**system level'**. There are following **important limitations**:

Remark from IT: The reason for those restrictions/limitations is not because they are 'too difficult for programming' but to avoid chances of publishing confidential data by mistake and to keep easy-to-overlook rules concerning 'who may see what?'.

- 'Agents' get **access on reports** where they are entered/**chosen as 'Agent'** - in following comments called **'visible reports', not** on **all reports** of the sub-contractors;
- under the right '**normal'** the **'**Agent' may **do changes** in these reports;
- you can **limit** the **access** for 'Agents' to **'read only',** which means the agent may only view/see/look at the visible reports, but **not to modify** them (see options in point 3.5.3.2, page 27, do choice in point 3.5.3.1, page 26);

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- 'Agents' **may not see tasks received** by sub-contractors;
- for **tasks sent** by the sub-contractors within 'visible reports' there are the **same** rules as for the **sub-contractor himself**, which means 'Agents' are only allowed to see detail data, if the 'task receiver' finished the task as 'open task';
- concerning '**personal acceptors'** of the sub-contractors 'Agents' may only see them in the **frame of treatment steps** where they are **entered** as 'acceptor' in 'visible reports'; in general, 'Agents' are not allowed to see, create or modify 'personal acceptors' of their sub-contractors;

  with editing/changing reports an 'Agent' may insert his own 'private acceptors' in reports of sub-contractors;
- 'Agents' may **not modify** the **company** of reports of their sub-contractors **nor** may they **create** reports for their sub-contractors;

  it's the idea that 'Agents' may not see if their sub-contractors are working for other 'Agents' too and of course they may not change the 'Agent' of reports of their sub-contractors.

Last but not least this extension of the 'Agent' - feature has consequences on **packages**. To avoid too much mind breaking *'who may see what under which circumstances?*' - issues, some quite restrictive but easy-to-overlook rules were chosen:

- **sampling results** deleted/hidden – see point 3.2.8, page 11
- 'Agents' may **not** see **packages** created by/for their sub-contractors **nor** are they allowed to **extract** packages for themselves from reports of sub-contractors;
- contrary 'Agents' may **insert** ('own') **packages** into reports of sub-contractors.

To repeat: Everything related to **control** this extension is located in the 'Admin tool':

1) for **enabling** the extension of 'Agents' rights to get access to reports of sub-contractors you'll find the additional checkbox '*Reports of sub-contractors visible to agents?*' on the 'Config' - page of the 'Admin tool' (see Chart 3, page 4, point 3.2.7, page 11); as long as this checkbox is **not clicked,** an 'Agent' will **never see** any data of its sub-contractors;
2) **additionally** to this 'overall-setting' you can set the **rights** for **each agent** on the 'Add / Edit treatment partner' - page (see e.g. Chart 13, page 24); here you will find the '*Reports of sub-contractors visible?*' - selection box with the 4 options of rights for 'Agents' (see point 3.5.3.2, page 27);

Remark from IT: if an 'Agent' is currently working in the WF-RepTool and phones you to make some quick changes in these settings for him, he has to logout and login again in the WF-RepTool after you made the changes.

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3.5.3.5. 'Agent' rights extended to 'full'

The right **'full'** gives 'Agents' the additional rights to

⇒ **create** and **delete** reports for their sub-contractors and
⇒ **change** the **company** in reports of sub-contractors (!) → this gives especially the chance to copy a report from one sub-contractor and use it for another sub-contractor *(remark: done on request but seen with concerns, see it positive to copy the structure as 'draft' but individual data are necessary!)*,
⇒ **extract packages** from reports of his sub-contractors (!),
⇒ **view** and **use all** (!) **packages** created from or for their sub-contractors, but he may **not modify** or **delete** them and is also not able to **create** ~~*sampling results or*~~ packages for his sub-contractors (if he really needs a new ~~*sampling result or*~~ package, he can create it under his name and use it in reports of sub-contractors).

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3.5.4. Double names for companies – do ‘summary companies’

In the ‘List of treatment partners‘ (see Chart 11, page 20) you will see the column **‘Assign in summaries to’**.

This feature has been introduced for giving the option to assign treatment partners to so called ‘**summary companies**. This means that in the WF-RepTool ‘Summaries’ all data related to this company may be shown under one entry of this ‘summary company’.

Background: your treatment partners have the chance to create their own ‘personal acceptors’. These ‘personal acceptors’ may not be seen by other treatment partners. So, if two (or more) treatment partners create the **same treatment operator** as ‘personal acceptor’, the same treatment operator may get two or more entries in the database (and as a consequence two different acceptors in ‘Summaries’).

Example: one of your treatment partners has created his personal acceptor 'Copper smelters Ltd.' and another one has created the same company as his personal acceptor 'Cu smelters Ltd.'. The result is that you get two different acceptors in your summaries, although it's only one company in reality and its real name is 'Copper smelters Ltd.';

To solve this do following:

- **decide** on the **correct name** to be used (e.g. 'Copper smelters Ltd.'),
- **find** (the wrong writing, name to be assigned) 'Cu smelters Ltd.' in your ‘List of treatment partners ...’ (see Cu smelter 1 in Chart 11, page 20) and **double-click** into the ‘Assign in summaries to’ – field (last column),
- in the following window you will find 'Cu smelters Ltd.' (= Cu smelter 1) already selected on the left side, very upper corner (see Chart 20),
- find (the correct name) 'Copper smelters Ltd.' (Cu smelter 2) on the right side, **click** on the **name** and it will be selected on the right side (see Chart 20),
- press the ‘**Assign’** - button and 'Copper smelters Ltd.' (Cu smelter 2) becomes the so called ‘summary company for 'Cu smelters Ltd.' (Cu smelter 1),
- from this moment all the data related to those (two) acceptor(s) will be shown under 'Copper smelters Ltd.' (Cu smelter 2) in your ‘Summaries’,
- press the ‘Cancel’ - button to reset the selection or the ‘Close Window’ - link to leave the assignment window.

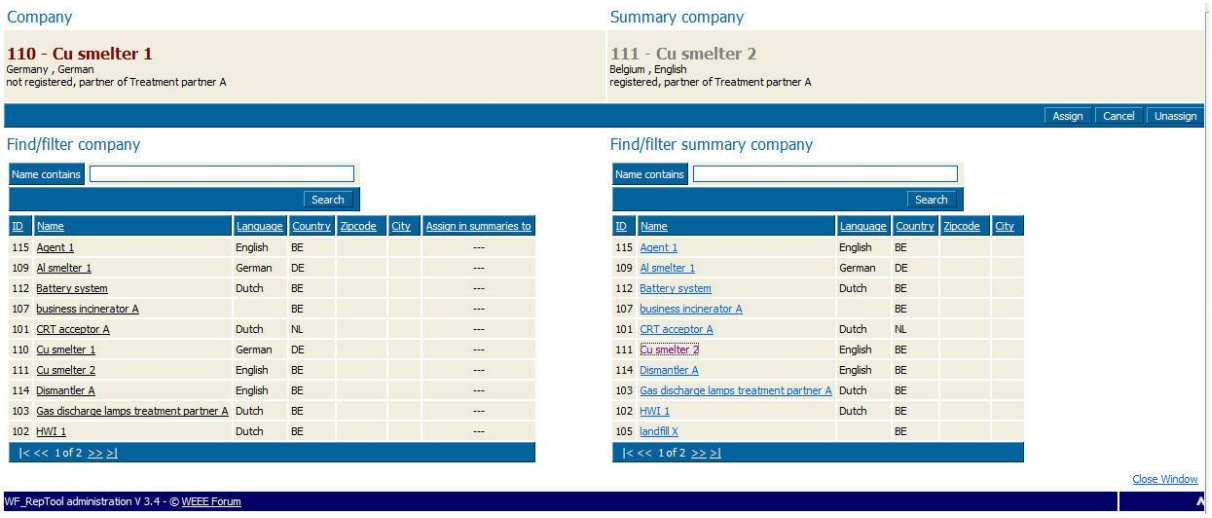

Chart 20: Assign treatment operators to ‘summary companies’

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The assignment window is designed to allow you doing more assignments quickly - imagine for the example above, that a third treatment-partner has created 'Cu ltd.' as his personal acceptor and in reality, it's also 'Copper smelters Ltd.'.

Instead of leaving the assignment window find 'Cu ltd.' on the **left side** and click on its name. Click again on 'Copper smelters Ltd.' (Cu smelter 2) on the right side and press the 'Assign' – button again. In this way you can stay in the window and do further assignments.

You will also find an 'Unassign' - button in the assignment window. Use this to solve an assignment done **by mistake**.

To avoid misunderstandings: choosing & doing 'summary companies' is only available on '**system level'**. On 'reporter level' nothing will change and your treatment partners see their 'personal acceptors' as they have been created by them. None of your treatment partners will see any 'summary company'.

Remark: You may give your treatment partners an advice to use common names for companies to avoid the need to do the work for 'summary companies'. See recommendation under point 3.5.1, page 19 that you as WEEE system / WF-RepTool access administrator may add commonly used treatment partners to the 'List of treatment partners' from the beginning.

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3.5.5. Delete treatment partners

To **stop** any treatment partner or any person from a treatment partner from having **access** to the WF-RepTool see point 3.5.2.5, page 25.

To **delete** any treatment partner at all = from the 'List of treatment partners' and therefore also from the 'list of acceptors' provided to the treatment partners you have to choose this treatment partner from the 'List of treatment partners' (see 'Companies', see Chart 11, page 20) by using the - button.

At the 'Edit treatment partner' - page (see Chart 13, page 24) you will find the **'Delete/Hide'** – button. You may use this button if a company should not be used anymore because of any reason.

If you press this **'Delete/Hide'** - button, two things might happen:

⇒ if the company was **not used** anywhere, it will be **deleted** physically from the database;

⇒ if the company is **already used** somewhere (reports, sampling results, etc.), it will be '**hidden'**. This means that the company stays in the database and is still shown everywhere where it had been used (before), but it is not available any more (e.g. in the scroll down of treatment partners) for new reports, sampling results, etc..

In the 'List of treatment partners' (see Chart 11, page 20) those 'hidden' companies are shown with **grey background**.

At the 'Edit treatment partner' – page there will be a big **marking 'HIDDEN'** and the 'Delete/Hide' - button turns into a 'Revoke' – button. By using the '**Revoke'** – button this company can be made available again (see Chart 21).

If you delete/hide a company, **all related users** are **deleted** to ensure, that users related to hidden companies do not have WF-RepTool access any more.

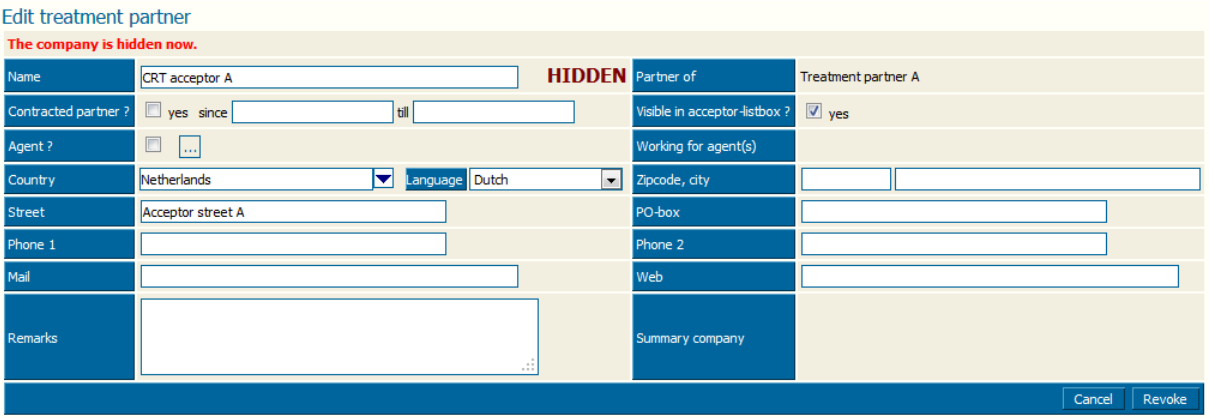

Chart 21: Treatment partner hidden

You as WEEE system / WF-RepTool access administrator may also **delete/hide personal acceptors**.

***Take care** to use this option only if you are really sure, that an acceptor is not needed any more (e.g. company closed). Otherwise the treatment partner who created this personal acceptor might lose his confidence, that personal acceptors are really personal.*

Hidden companies are **not shown** any more in the **find / filter options**. If you want to filter on entries from deleted/hidden treatment partner (e.g. where they have been used), you have to reactivate them temporary in the 'Admin tool'.

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3.6. Users

By choosing the main menu option 'Users', you come to a **list** of **all users** (person) having **access** to the WF-RepTool under 'your' WEEE system / WF-RepTool access administration sorted to 'User' (= the login).

This is 'list of users' foreseen for having an **overview** only.

You may **search** for 'User' from your treatment partners (search in 'Company contains', also parts of the name possible) you have provided access and you may **sort** to different headline entries of the 'list of users' (see underlined).

Remark from IT: forget about the Group-information

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3.7. Inspection rules

With the ‘Inspect’ feature it is possible to check the completeness of a WF-RepTool report during work. For information on how to use this feature see the ‘user manual – reporter level’, ‘Inspect’ (see point 3.7).

This is an automatically inspection of the report regarding the **most common mistakes** (especially missing data). You as the WEEE system / WF-RepTool access administrator may decide about (choose) warnings to be given.

For this you have to use the main menu option ‘Inspection rules’ and you may decide about warnings to be given by clicking or un-clicking the checkboxes (see Chart 22).

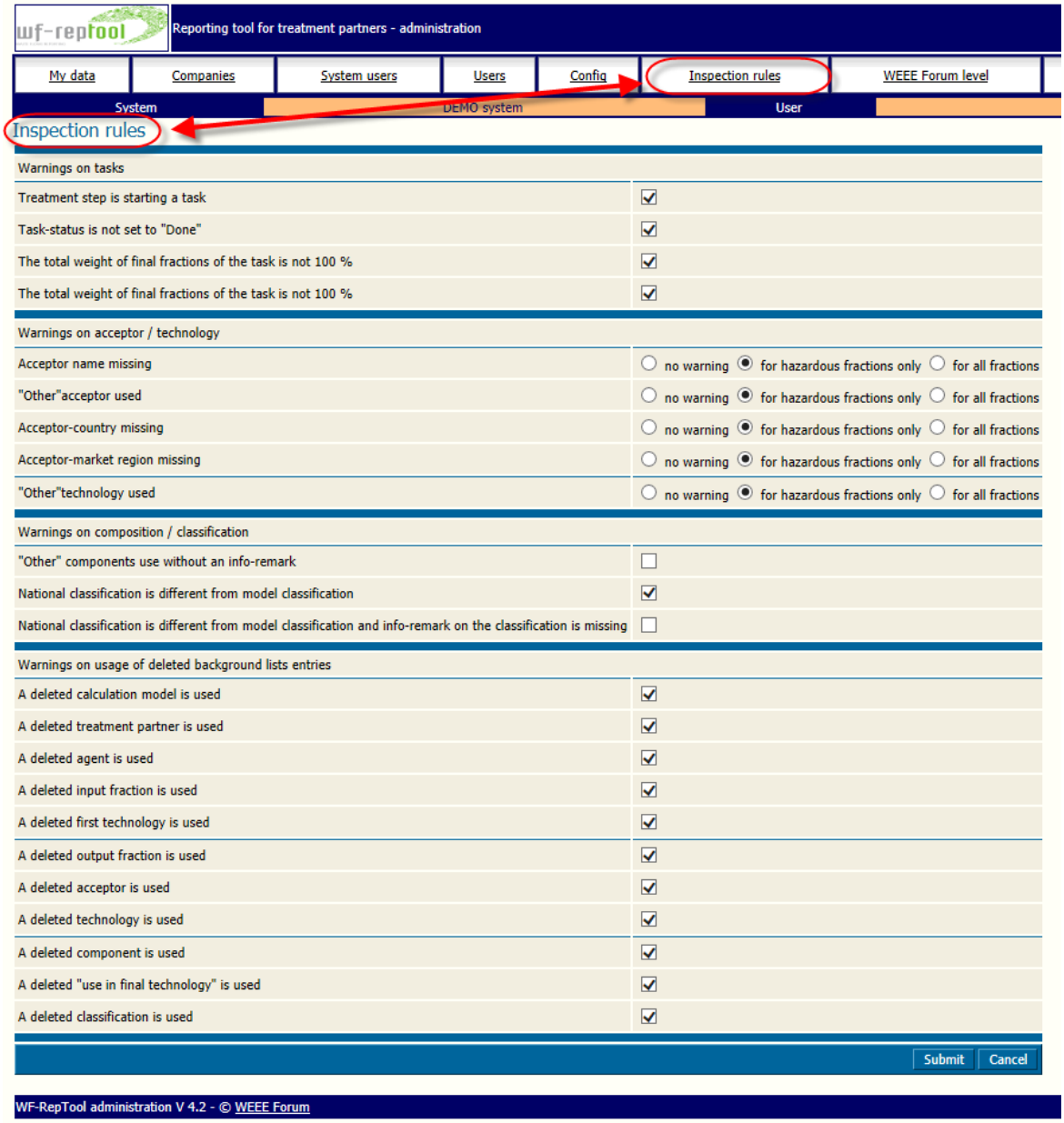

Chart 22: Choice for inspection rules

Most warnings are activated by pre-setting, but you may deactivate the undesired ones by un-clicking.

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3.8. Archive

Via the new main menu option ‘Reports to archive’ (see Chart 23) you may put e.g. old treatment results to an archive.

Chart 23: Menu - ‘Archive’-option for reports

Archived reports will not be shown in

- the ‘List of available reports’
- the ‘Copy previous’-selection
- choices for ‘Summaries’ and ‘Compare’ reports and
- the selection - page for creating summary reports.

When you choose the ‘Reports to archive’ menu bottom, you will come to a page to select reports for putting them to the archive – see Chart 24, upper area.

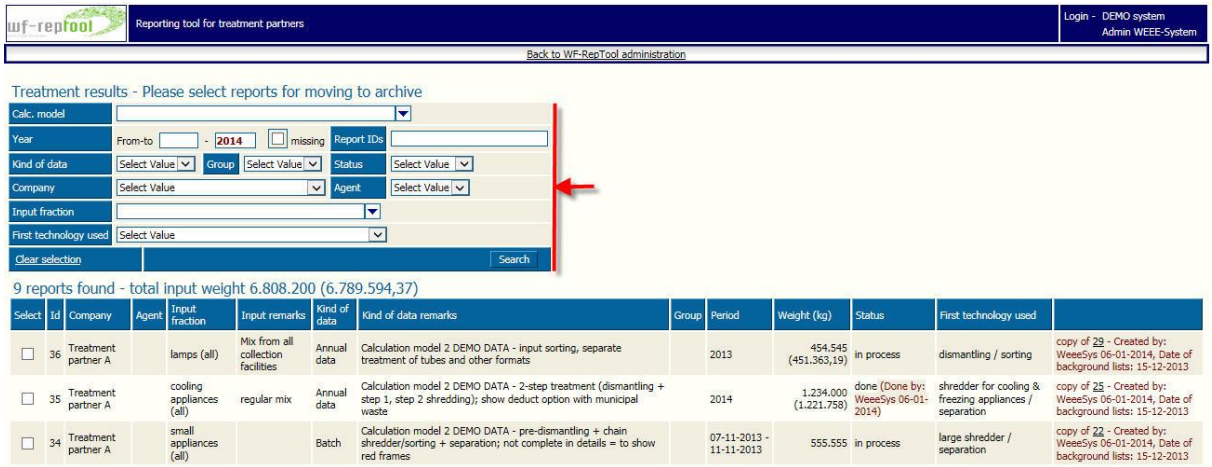

Chart 24: Selection option for reports to the ‘Archive’

After having done your selection, you may select individual report(s) for putting them to the archive by clicking the checkbox at the individual report(s), see Chart 25, left side.

You may also select all reports you have filtered by the selection criteria above – see Chart 25, bottom line, red circle.

Finally, you have to use the ‘Move selected reports to archive’ button in the bottom line to put selected reports to the archive.

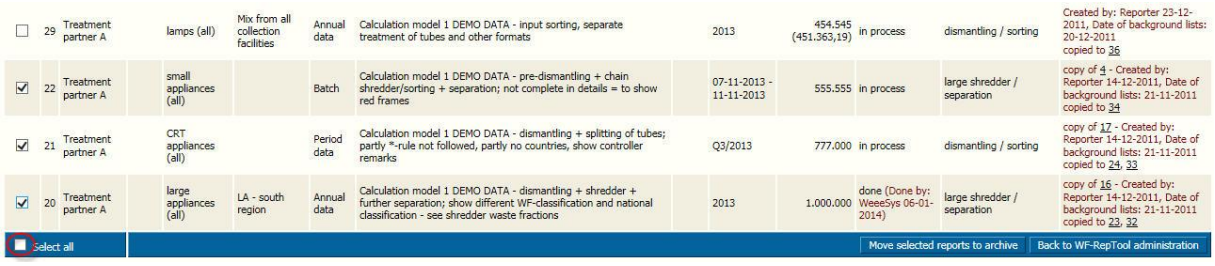

Chart 25: Select and move reports to the ‘Archive’

You may restore/re-show individual reports – see ‘user manual - reporter level’ for this.

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3.9. Countries

Under the main menu option ‘Countries’ you may choose countries, which you want to provide under listboxes for countries under your WEEE system / WF-RepTool access administration.

You will see that **all EU / EFTA** countries are **already chosen**. They will be assigned to the market region ‘EU / EFTA’.

In the demo version Turkey and China have been already chosen and they are assigned to the market region ‘outside EU / EFTA’.

If you want to provide additional countries, you may **search** them with the ‘Find / filter’ – options for the (part of) the **name** and/or the **ISO shortcut**.

Having found the country you look for, you just have to click the underlined ‘**Add’** – entry and the country will be taken over to your listboxes.

Take care: This is a *one-way* function - you will not be able to reset.

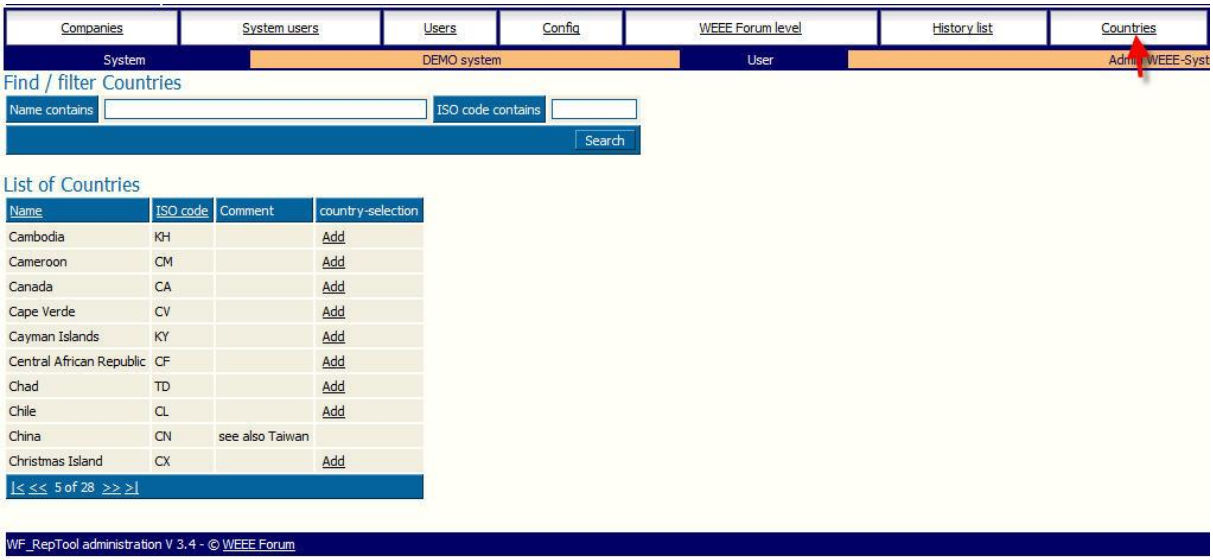

Chart 26: Choose countries for country choices

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4. Additional features in the WF-RepTool

For using the following additional WF-RepTool features and to check all reports you have to use the **WF-RepTool access** (see URL ending with */reptool,* see point 1.1, page 1).

Please consider that you should have a look at the **'user manual - reporter level' before** to be able to understand this '**additional features'**.

4.1. All reports / all treatment partners

First of all, you as a **user** at the **system level** will **see all reports** of **all treatment partners.** At all/most pages, find / filter options etc. you will find an **additional column** or **box** for searching for **'Company'**. You may **change all data**.

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4.2. Reset 'Status' of report on demand

If a **treatment partner** / reporter has set the 'Status' for a report to **'done'** once, he **may not** reset the 'Status' anymore (you might have used this report already for overviews, reports to the authorities etc.).

If the 'Status' has been set 'done' just by 'mistake', the treatment partner / reporter may contact you and **you may 'reset'** the **'Status'**.

For this you have to go to the main menu option 'Treatment results' and choose the report to be changed (e.g. search for the 'Company', 'Kind of data' etc. and 'Status' 'done'), open the report with the - button and choose another option in the *scroll down* for 'Status' (see Chart 27).

You have to use the **'Reset status'** – button to **approve** this change.

You will get a **warning** that you shall not forget to reset the status again (see Chart 28). You have to approve by using the **'Submit'** – button and the 'Status' will be reset.

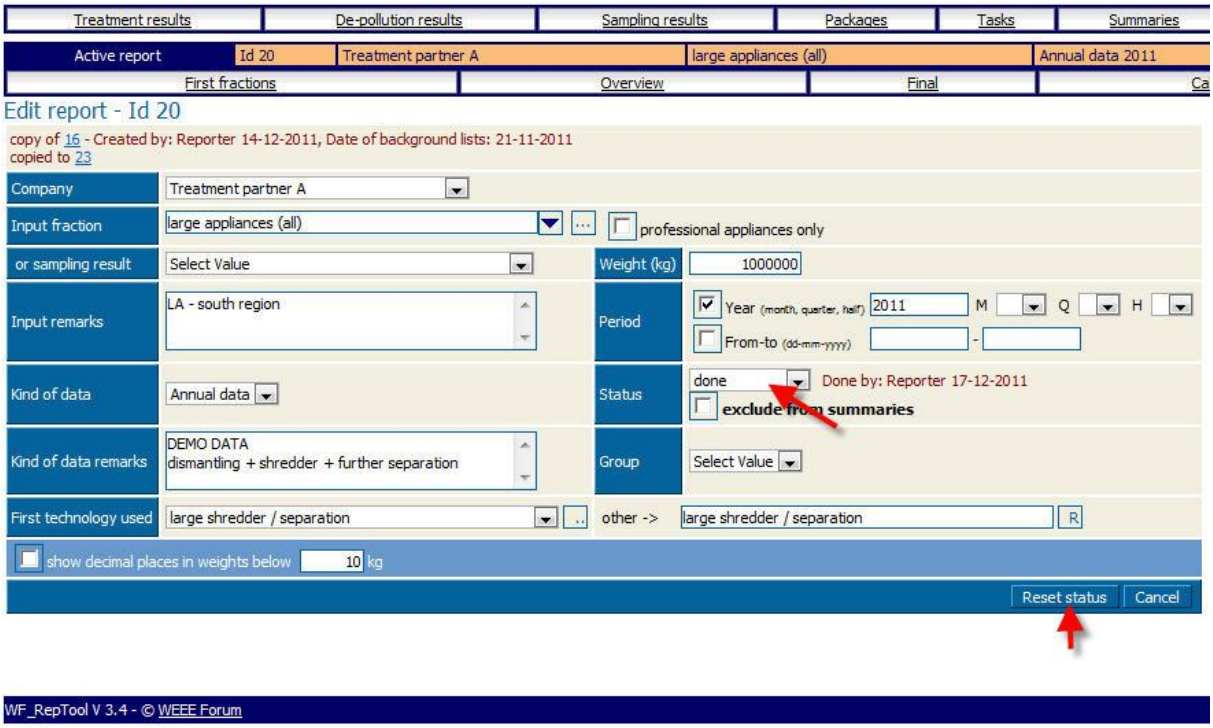

Chart 27: Reset 'Status' of a report

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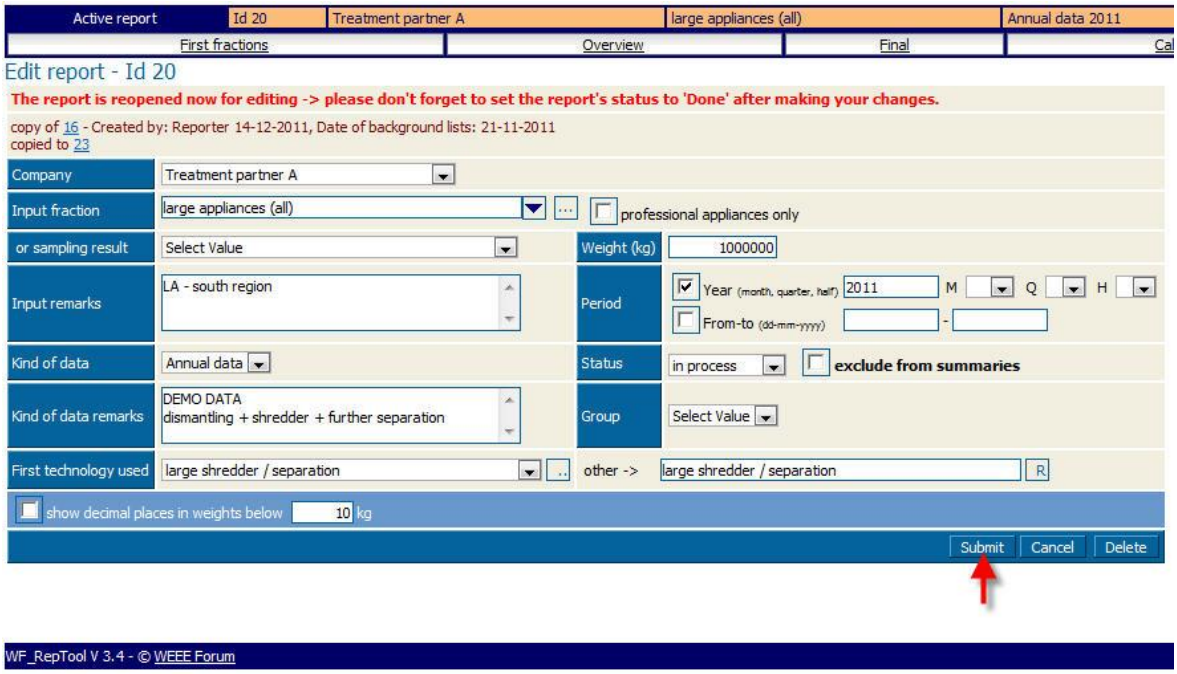

Chart 28: Warning for reset 'Status'

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4.3. Additional features in/with treatment results

4.3.1. Own reports – provide drafts to treatment partners

You as WEEE system / WF-RepTool access administrator have **more options** to **copy / paste** reports (for copy / paste reports see 'user manual - reporter level' point 2.2.2).

You may for example **'create'** a 'Directory' of 'Drafts'/'Dummies', your 'Batches' or similar for your **own use** - see point 3.5.2, page 20 to create this 'Directory' like a treatment partner, call it e.g. 'Batches system'.

You will let the checkbox '*Visible in acceptor-listbox'* **un-clicked** (see point 3.5.2.2, entry at page 22) so that this 'directory' = treatment partner will not be visible to others in the scroll down for acceptors.

You may do your **own reports** under this directory. To **help** a treatment partner starting up you may even provide a good **'Draft'** report to a treatment partner by doing a copy of a good example (with rounded figure, no acceptors,...) and change = edit the 'Company' name to his name later (see Chart 29).

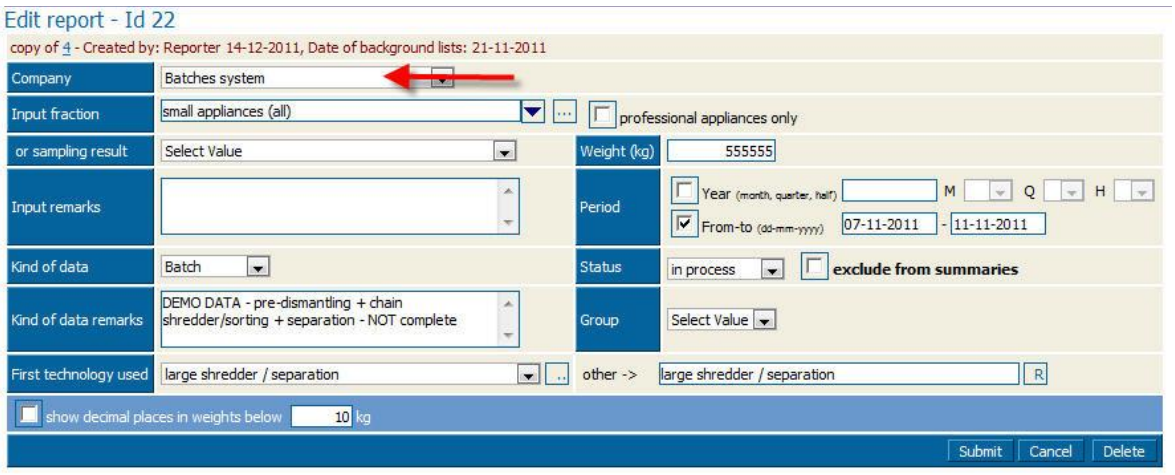

Chart 29: Change name of company at/for report

But **be aware** (experiences done ....), treatment partners might be 'lazy ....', they take this report, do no or very limited changes and might 'sell' this report to you as 'their reports'. So, it's your decision to use this option or not.

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4.3.2. Choose 'Agent' ('Pro' only)

If you are using the **'Agent' - feature** (see point 3.2.7, page 11), you might find the additional field 'Agent' at the 'Edit report' – page. If this field is shown or not depends on following:

- you must have **activated / opened** the **'Agent' - feature** (see point 3.2.7 page 11),
- the **reporting company** must be **assigned** as 'sub-company' to at least one 'Agent' (in the 'Admin tool').

Also the selection (choice) offered in the 'Agent' - field (*scroll down*) depends on:

- if you **edit** an existing report only the 'Agent' is shown, where the reporting company had been assigned to as 'sub-company',
- if you create a report on reporter-level only the 'Agent/s' is/are shown where the logged in company had be assigned to as 'sub-company',
- if you **create** a report on **system-level all 'Agent/s'** are shown, the reporting company <> agent combination is under **your responsibility**.

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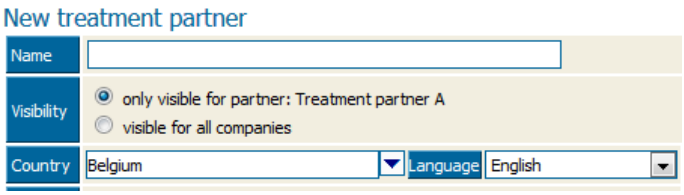
4.3.3. Add treatment partners

You as system user may add treatment partners, which might be used by all your treatment partners, via the 'Admin tool' (see point 3.5.2, page 20).

If you do in case a report for = on behalf of one of your treatment partners, you may add treatment partners like the reporter does (see user manual – reporter level, point 2.5.2.6).

Additionally you may decide about **who** may see this treatment partner by choosing one of the checkboxes (see box beside):

- only visible for partner abc[6]
- visible for all companies



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4.3.4. Additional export option

The PDF- and Excel export choice (see user 'manual – reporter level' 'Export features', point 3.6) contains a special option for WEEE systems / WF-RepTool access administrators to exclude confidential data form download (see box below, bottom line):

⇒ '**exclude confidential data'** is only available for system users and only for reports containing tasks. It allows system users to get the same export result as the treatment partner not showing confidential data.

In the **WEEE operator version** the option for confidential tasks will be **disabled** (see user manual – report level, point 8.5.1.2), so this option will not be given.

[6] *here 'Treatment partner A' is the treatment partner you are just doing the report for*

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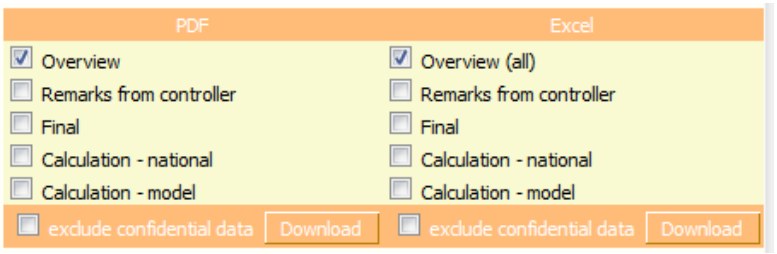

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4.4. De-pollution results ('Pro' only)

Beside the 'regular' option to create 'full' treatment results an option to create **de-pollution results** has been created. These de-pollution results are 'shorter' treatment results mainly focussing on the yield of components or substances removed for de-pollution – for all details on use, please see the 'user manual - reporter level' (Chapter 6).

You as a WEEE system / WF-RepTool access administrator have the additional option to **change de-pollution results** to **treatment results** and back. You may do this from the button line of the 'Overview' of de-pollution results – see Chart 30.

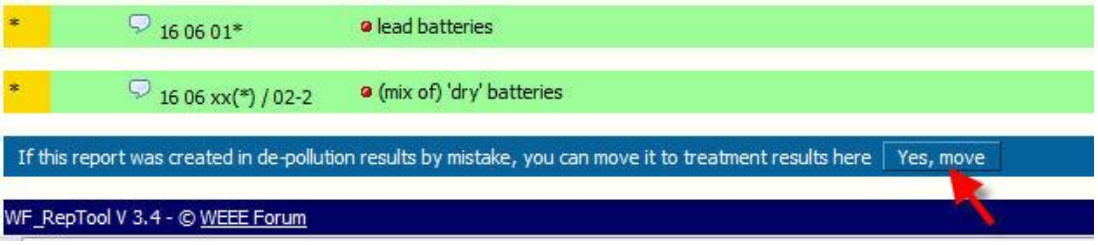

Chart 30: Change de-pollution results to treatment results

Changing treatment results to de-pollution results is only possible, if you have determined 'first fractions' only – see Chart 31

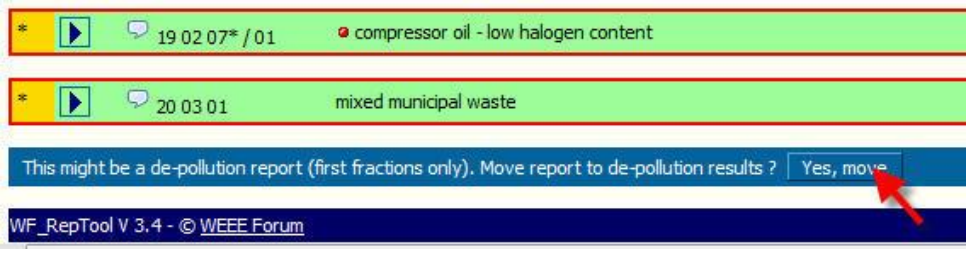

Chart 31: Change treatment results to de-pollution results

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4.5. Packages

4.5.1. Create and provide packages

You as a WEEE system / WF-RepTool access administrator may **provide packages.** You may do this e.g. for OUTPUT fractions forwarded from a **big number** of treatment partners (e.g. in small volumes) to **one treatment company** in your country (e.g. fluorescent tubes from dismantling companies to the treatment company abc or batteries dismantled from dismantling companies and forwarded to the 'Battery system xyz').

You may do the definition of a package and fill in package results like explained in the 'user manual - reporter level' (see chapter 11).

Your additional feature is that, when you **add** a new or **edit** an existing package, you may select **by whom** this **package** may **be used** (see Chart 32). You may distinguish if this package may be used by

- **all** treatment partners or
- **any specific** treatment partner (e.g. you create the package for him).

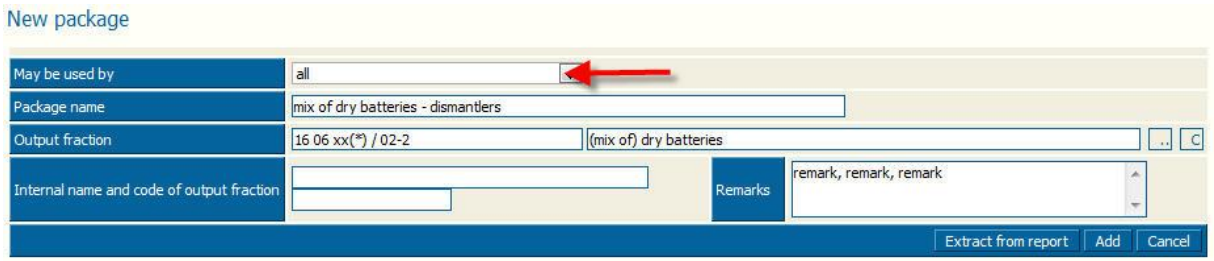

Chart 32: Choose possible user of package

If you create a package **to be used by all** treatment partners (see Chart 33, green circle) of course it has to be **agreed** with the 'accepting' treatment company (see package information includes the accepting treatment company) as all treatment partners having access to the WF-RepTool will see and might choose this package.

Chart 33: List of available packages – also provide to all

If you create a package to be used **by one specific treatment partner** (see Chart 33, red circle) you will agree with him that you are just doing a 'help function' for him and '**he'** / the treatment partner **may use** it for himself or e.g. for **tasks** handed over to him and he may decide if the task shall be finished as 'open task' or 'black box' information (see 'user manual - reporter level', point 8.5).

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4.5.2. Convert a selection of packages

The WEEE system / WF-RepTool access administrator may convert **several packages** from calculation model 1 to model 2 in **one run**. This feature was developed for WEEE systems / WF-RepTool access administrators working with a lot of packages.

For this, you may use the main menu option '**Packages model copy'** under the WF-RepTool **administration** (see point 3, page 3), see Chart 34.

Chart 34: Menu with 'Packages model copy'

When you click this 'Packages model copy' button, you will come to a page (see Chart 35) at which you may filter packages like explained for other find / filter options (see upper area; for explanations on how to find / filter see user manual – reporter level).

To avoid creating more than one copy of a package by mistake, you may select packages, which have not been copied to model 2 before. For this, choose the 'Copy status' 'Model copy not done yet' in the find / filter selection (see Chart 35 chosen).

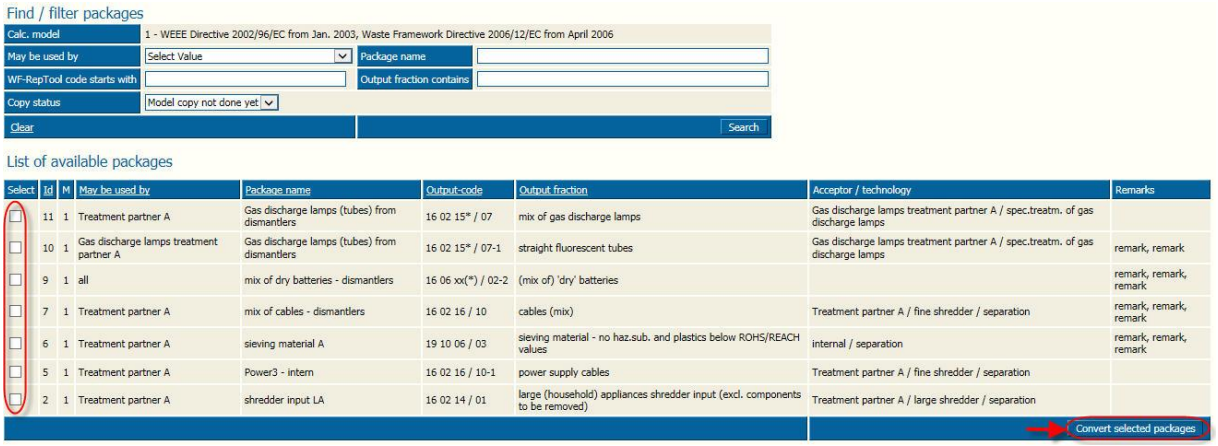

Chart 35: Select and convert several packages

From the 'list of available packages' (in case filtered), you may **select** packages for converting them by clicking the checkboxes beside the packages (see Chart 35, left side).

Finally, you have to click the '**Convert selected packages'** button in the bottom line of this page to convert the selected packages.

Please consider that you have to **check converted packages** like explained for converted reports in the 'user manual – reporter level' (see *'Convert a report from 'model 1' to 'model 2'',* point 5.3).

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4.6. Tasks

4.6.1. To see and manage tasks

Under the main menu option ‘Tasks’ you will see **all tasks** set by your treatment partners and if they have been done (plus when) and how (open task or ‘black box’ feature) (see Chart 36). For options to set and fulfil tasks see ‘user manual - reporter level’ (Chapter 8).

Chart 36: List of available tasks (NEW: column ‘Report’ right beside Id)

Remember: **choosing** the **‘visibility’** of any task (‘open’ <> ‘black box’ feature – see Chart 36, green circle) can **only** be set by the **treatment partner** ‘receiving’ and ‘fulfilling’ the task, not by you as WEEE system / WF-RepTool access administrator.

If you see **any ‘mistake’** or **non-plausible** data (see you as WEEE system will see all information from a task, also from tasks finished with the ‘black box’ feature) in a task, you may get in contact with the relevant treatment partner and inform him.

In the **WEEE operator version** the option for confidential tasks / the ‘**black box’ feature** will be **disabled** (see user manual – report level, point 8.5.1.2). All tasks will be shown as ‘open’ tasks.

You as WEEE system / WF-RepTool access administrator may **re-set** the **‘Status’** of the task from ‘done’ and you may ask the treatment partner to check.

You may also take the ‘**role**’ to **remind** the ‘next step’ treatment partner that he has to fulfil any task. In general, this is seen as the obligation of the ‘sender’ of any task, but you may ‘help’ (this is your decision as WEEE system / WF-RepTool access administrator).

For you as **system users** the ‘List of available tasks’ shows an additional **column** ‘**Report’** with the **Id** of the related **report** where the task is included. This Id is designed as **link** - if you click on it, the ‘Overview’ for this report is shown and automatically scrolls to the treatment step related to the task.

The same **link** to the **report Id** is also shown in the **caption** of the **task** ‘Overview’ / ‘Final’ / ‘Calculation’ – pages and the report Id is also shown in the PDF- and Excel-**export** for tasks.

Vice versa the **info on task/s** inserted in a report shown in the report header – see box beside - contains now the **task Id/s** as link to jump to the ‘Overview’ of the related task (see red circle) (also for system users only).

4.6.2. Tasks in copied reports

When a report will be created via ‘Copy previous’ (see ‘user manual – reporter level’, e.g. point 2.2.2), the WEEE system / WF-RepTool access administrator may decide by settings in the WF-RepTool configuration if the task content is copied or not (see point 3.2.12 page 14).

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4.7. Summaries

NEW19 The menu point ‘Summaries’ was split to summaries on ‘Treatment results’ and the new feature for the ‘Evaluation’ of reports (see point 4.10, page 52) – see box beside.

In following text we keep the term ‘Summaries’ for the summaries on ‘Treatment results’.

For options and examples on doing ‘**Summaries’** please see ‘user manual - reporter level’ (Chapter 9). You as WEEE system / WF-RepTool access administrator may do **additional ‘Summaries’**. You may (see Chart 37 with pre-settings) e.g.:

- **select** the treatment partner **= ‘Company’** you want to have a ‘Summary’ for,
- **filter** to and/or **group** by the **‘Agent’** *[only if you are using the **‘Agent’** – feature]*,
- **filter** for **all** acceptors,
- **filter** to and/or **group** by the acceptor **countries.**

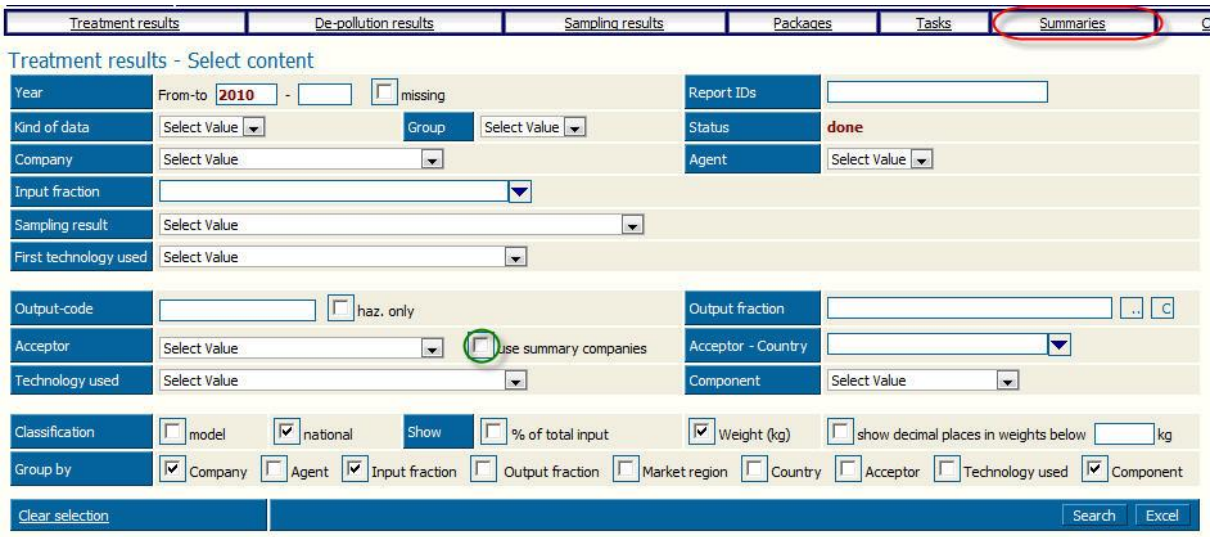

Chart 37: ‘Summaries’ options

If you:

⇒ have assigned companies to **‘summary companies’** (see point 3.5.4, page 30), you will find the additional checkbox ‘use summary companies’ beside the ‘acceptor’ – choice (see Chart 37, green circle):

- if you mark this checkbox, all the data related to ‘acceptors’, will be grouped to ‘summary company/ies’ defined;
- if you filter for ‘acceptors’ = in the scroll down for ‘acceptors’ treatment operators who have been assigned to ‘summary companies’ will be shown with summary company in brackets;

⇒ do **‘Summaries’** for any **‘collection & treatment category’,** you will get a ‘Summary’ for all treatment partners charged, this ‘Summary’ may be used as / as a basis for ‘your’ report on the collection & treatment category to authorities (e.g. also with the choice for ‘national classification’);

⇒ do **‘Summaries’** for **all WEEE** treated on **your behalf** for a defined period (e.g. year), you will get the basis for ‘your’ report on ‘total amounts treated on your behalf’ to authorities (e.g. also with the choice for ‘national classification’).

For doing such ‘Summaries’ in an **easy way** you should **agree** with your treatment partners about a common way of the use of ‘**Kind of data’** and the ‘**Period’** of data and/or the ‘**grouping’** of reports.

They may use the WF-RepTool to create different reports, but they should use the 'Kind of data' **'Annual data'** and the **'year'** for the 'Period' only for reports to 'you' as the WEEE system / WF-RepTool access administrator and for WEEE treated in one year on 'your behalf' (see examples under point 2.2.1.2 in 'user manual – reporter level').

This will give you the option to **select 'Annual data'** and the **individual year**.

Be aware: The menu option 'Summaries' does only generate **overviews** which you might **export** from the WF-RepTool as Excel files to further work with (e.g. make annual reports to authority). To generate **new WF-RepTool reports** for e.g. a year, please see the option to do **'Summary reports'** ('Pro' only) in the 'user manual - reporter level' (see Chapter 10).

Consider that for 'Summaries' you may only choose reports done under the **same calculation model** (see 'user manual – reporter level', point 9.1).

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4.8. Compare results ('Pro' only)

When you choose the main menu option '**Compare' (**see Chart 38), you will get the choice of 'Treatment results' and 'De-pollution results' ('Pro' only) – see box beside.

After having done your choice for 'Treatment results', you will come to a selection option which is very similar to the 'Summaries'- page (see point 4.7before) but has two big differences:

⇒ you may **compare 'Reports'** or '**Companies'** (see Chart 38, red circles) – you may e.g. pick two specific reports from two different companies and may compare them in e.g. yield as % of 'components' → make your choice!

⇒ results given by the selection will be shown as **'x reports found'** and you may **open** this **list** by clicking this underlined 'x reports found', choose the reports you want to compare by clicking the select- checkboxes – same as for 'Summaries'; when you have done this choice selected reports will be shown **side by side** (see Chart 38, red arrows)

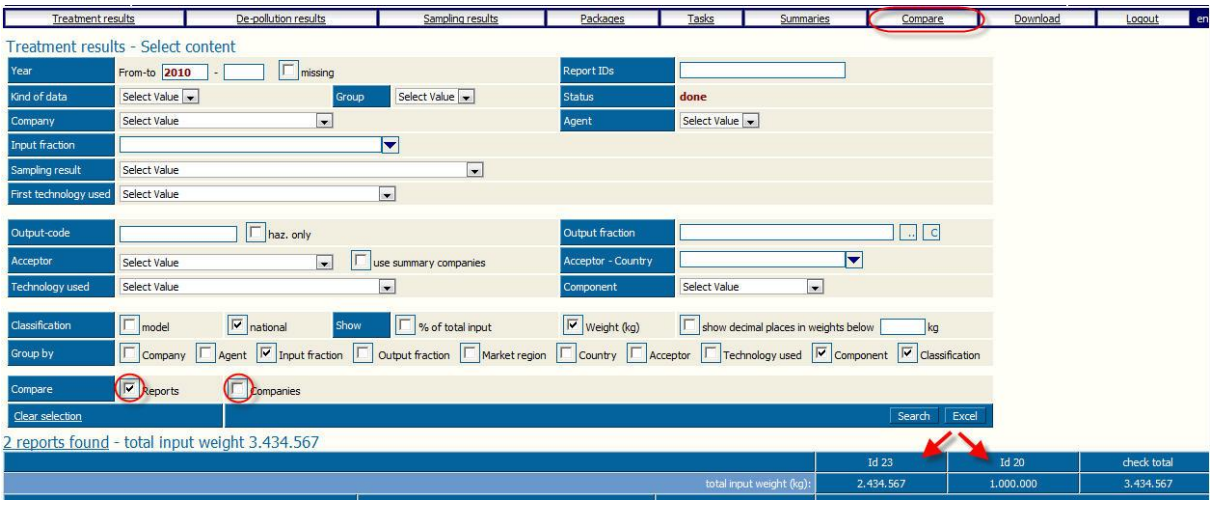

Chart 38: 'Compare' options (NEW: additional 'Group by' option)

There are following **limitations**:

- the whole feature is only available on '**system level'**, your treatment partners don't have this additional 'Compare' - button,
- like in 'Summaries' only reports '**done'** and **not** being '**excluded from summaries** are shown,

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- you may only choose reports done under the **same calculation model** (see user manual – reporter level, point 9.1, manual version end2013),
- you will see only reports for which a **time period** has been given in the report identification (see time period you choose by 'From-to' for comparison).

For the **'Group by'** option and the new option to get an **individual order** of information shown, please see the point 'Analyze' in the 'user manual – reporter level' (point 3.6).

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4.9. Controller remarks ('Pro' only)

The controller of a report (WEEE system or charged expert) may give his remarks on a report **within** the WF-RepTool report. Remarks are **copied** together with the report.

Controller remarks may only be **set** from the **WEEE system** / WF-RepTool access administrator and/or **controllers** having got same rights to work from the 'system level' or controller rights (see point 3.3, page 17). The 'reporter' is not allowed to start setting any remarks

Controller remarks may be set to reports of **any status** ('in process',' to be verified' or 'done').

NEW19 Controller remarks are given **individually** to each report. Please see the other options for 'automatic inspection' like the 'Inspection rules' option (checking mainly the **completeness** of = entries to reports) (see point 3.7, page 33) and the '**Evaluation'** feature (see point 4.10, page 52), with which you may check the **plausibility** and **correctness** of data entries in **all** reports provided to you.

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4.9.1. How to see & set controller remarks

Anywhere you see an **empty 'bubble'** (🗨) you may **start** = **set** controller remarks.

Controller remarks may be **seen** differentiated by following icons:

- 🗨 there are **no controller** remarks till now,
- 🗨 there are **open controller** remarks and/or the report's control status is 'in process',
- 🗨 there are open controller remarks and/or the report's control status is 'in process', but the **reporter** has set the '**Answer status'** to '**done'** resp. '**closed'**,
- 🗨 there are controller remarks, but they are already '**closed'** and/or the report's control status is already set to '**done'** by the controller.

When you **move** the **mouse** over any of these icons, the remark is **shown** in an information pop-up, '**click'** the symbol and you will come **into** the remark.

Controller remarks will be shown in:

⇒ the '**list of available reports'** (see Chart 39, see symbol for open controller remarks beside report Id) – means: there are **any controller** remarks set for this report,

⇒ the '**Overview'** (see Chart 40 in the 'Overview' content),

⇒ the '**list of OUTPUT fraction'** or at the '**Treatment of ...'** - page e.g. in the field for the acceptor or technology use,

⇒ the '**Graph'** (see box later).

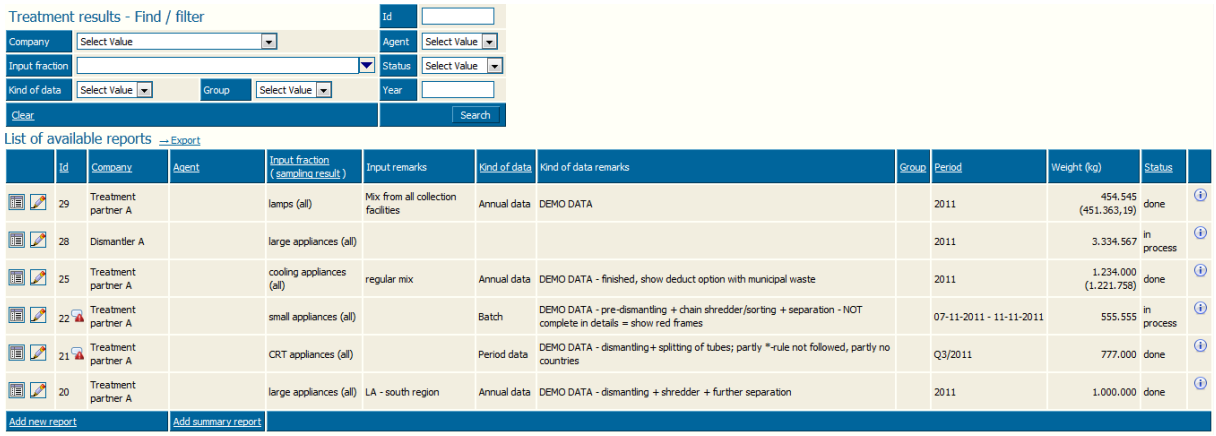


Chart 39: 'List of available reports' with controller remarks

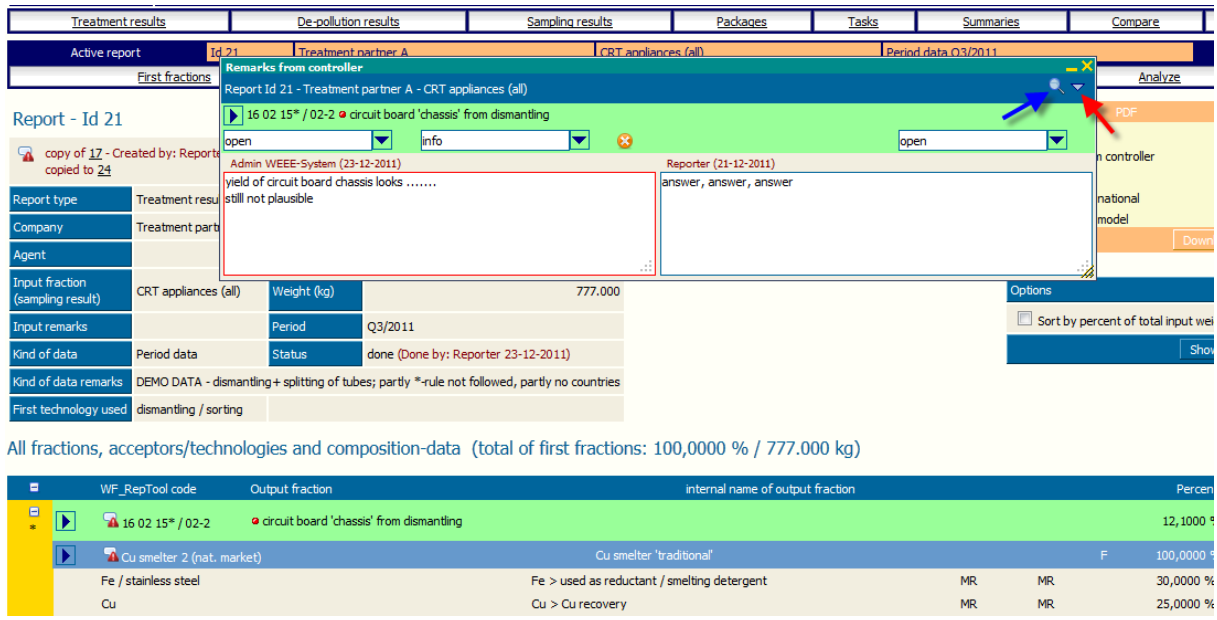
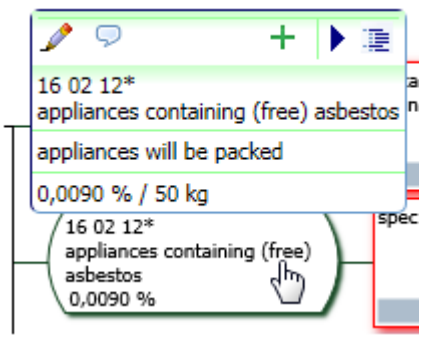


Chart 40: Controller remarks in 'Overview'

In the **Overview'** (see Chart 40) the 'bubble' is available in the line for the **fraction** (green line) and in the line for the **acceptor / technology** (blue line). We recommend using the controller remarks in the 'Overview' in the:

- **green line** for the **fraction** () to give remarks on the **name** of the **fraction**, the **yield** from this fraction or the **composition** of this fraction,
- **blue line** for the **acceptor / technology** to give remarks on the **name** of the **acceptor**, the (plausibility of the) kind of **technology**, any remarks/question on the **use of any component** in the kind of technology mentioned.

In the '**Graph'** you move the mouse over the **graph symbol** you want to give a remark on (fraction or technology) and you will see the 'bubble' (💬) in the headline of the pup-up information (see box beside) allowing you to enter a controller remark.



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If you click the **symbol** of **controller remarks** in **'list of available reports'** (see Chart 39, beside report Id), you will come to the whole '**list of controller remarks'** given for the report like shown in Chart 41, page 48).

You may also come to the **'list of controller remarks'** (see Chart 41 page 48) from the '**Overview'** – page of the report. For this you have to click the icon in the header area of the report – see box beside.

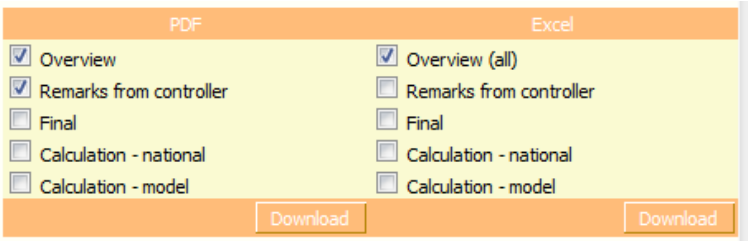
If you click the symbol of controller remarks at **any fraction** of the 'Overview' (see Chart 40, page 46), you will come to the '**specific remark'** (see point 4.9.2.2, page 49) for this **fraction** (see example in Chart 40, page 46) and you may **edit** this specific remark.

In the upper right corner of this window you will find an **- icon** (see Chart 40, red arrow). Use this icon if you want to see the 'list of **controller remarks'**.

If there are **more than 3 remarks** for a report, you will find an **- icon** in the upper right corner of the controller remarks window (see Chart 40, blue arrow). Click this icon for the option to **find / filter remarks**. You will mainly use this option to check answers given by the reporter – see point 4.9.3, page 50.

Controller remarks are included in the **PDF** 'Overview', if you click the additional *'Remarks from controller'* in the PDF download – see box beside. This is a good idea if you want to use a PDF-print out of the report for any on-site discussions or any audit.

The controller remarks may also be exported to **Excel**.



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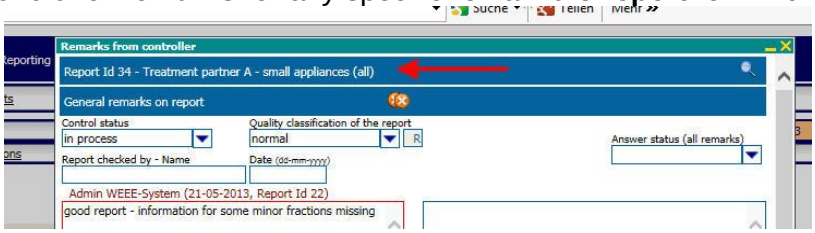
4.9.2. Identification & structure of controller remarks

In the **header** of this '**list of controller remarks'** or any specific remark the **report** for which the controller remark is given is **identified** (Id, plus treatment partner, input fraction – see box beside).



The controller box (for 'list of controller remarks' or any specific remark) is split to a **controller area** on the **left side** of the window and all fields for the **reporter** on the **right side** (see e.g. Chart 41 below).

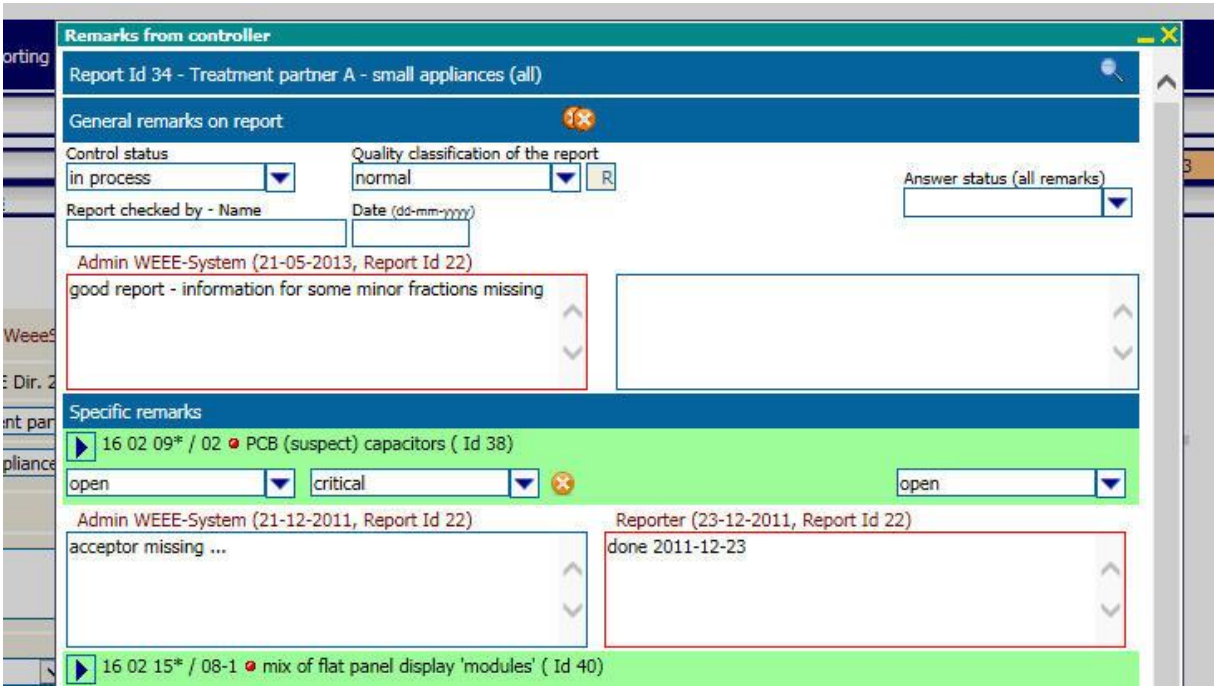


Chart 41: Window with 'list of controller remarks'

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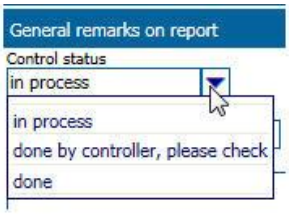
4.9.2.1. General controller remarks & evaluation

In the **upper area** of the **'list of controller remarks'** (see Chart 41, page 48) you will find **'General remarks on report'** which include at the **left** side (for the controller):

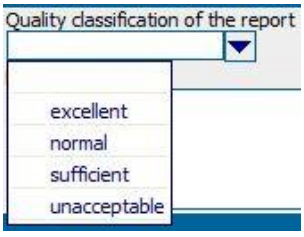
⇒ **'Control status'** *scroll down* distinguishing between (see box beside):

- 'in process',
- NEW18 'done by controller -> please check'
- 'done'



The control status of a report is automatically set to **'in process'** when you add the **first controller remark** to a report;

⇒ '**Quality classification** of the report' *scroll down* with options of classifications like shown in the box beside.



At present there are **no general rules** of the WEEE Forum / the WF-RepTool expert group how to do this quality classification, you should find your own classification rules – see box with recommendations.

Examples recommended as to be used are:

- *'excellent': everything perfect with this report, maybe some 'info' information (see level of relevance')*
- *'normal': de-pollution results are traceable, information for the general calculation of the recycling & recovery rate is plausible, some 'normal' information is missing*
- *'sufficient': de-pollution results are more or less traceable, information for the general calculation of the recycling & recovery rate is more or less plausible, some 'normal' and/or 1-2 'critical' information are missing, press min. one eye and reports results are ok*
- *'unacceptable' – worse than 'sufficient, quite some 'critical' information is missing, not intention from treatment partner seen to improve report.*

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Beside the **quality classification** scroll-down choice there is a **remark button** R (see Chart 41). If you use this button, a text field '**Remark on report quality'** will appear in which you may give remarks on the **report quality** (beside general controller remarks – see next) *(e.g. quality has improved but ...)*

⇒ NEW18 For closer information on controlling you will also find the additional fields '**Report checked by** – Name' and Date, fields to be entered manually (see Chart 41).

⇒ A text field for **general controller remarks.** NEW18_explain Here the controller of the report may write remarks which are relevant for the **whole report** *(e.g. general: missing acceptors must be noted as ..., improve source of data)*.

Only you as the WEEE system / WF-RepTool access administrator / the controller may choose the 'Quality classification of the report' and set the 'Control status' to 'done'.

The **right** side of the 'list of controller remarks' (see Chart 41, page 48) is for the reporter. Here you will find:

⇒ an '**Answer status** (all remarks)' *scroll down* distinguishing between 'in process' and 'done' which shall indicate to you as WEEE system / WF-RepTool access administrator / controller if answers are finished from the point of view of the reporter for the **whole report** – see options to control, re-set in point 4.9.3.;

⇒ a text field for **general remarks** from the **reporter**.

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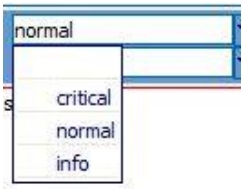
4.9.2.2. Specific remarks'

In the **lower area** of the 'list of controller remarks' (see Chart 41, page 48) or at **each** individual controller remark for any OUTPUT fraction or acceptor/technology (see Chart 40, page 46) you will find *'***Specific remarks'** for one OUTPUT fraction and/or acceptor/technology which include at the **left** side (for the controller):

⇒ a '**status'** of this remark *scroll down* (left side) distinguishing between 'open' and 'closed', 'open' is chosen as default value;

⇒ the '**level of relevance'** of this remark *scroll down* (2nd position from left side) distinguishing between 'critical', 'normal' and 'info' like shown in the box beside.



At present there are **no general rules** of the WEEE Forum / the WF-RepTool expert group how to choose this 'level of relevance' classification, you should find your own classification rules – see box with recommendations.

Examples recommended as to be used are:

- *'critical': questions which are very relevant for the treatment of hazardous wastes from WEEE or very relevant missing (or expected as to be wrong) information (e.g. technologies) for the calculation of the recycling & recovery rate, e.g. should be answered/adapted within this report*
- *'normal': relevant information for the calculation of the recycling & recovery rate, plausibility of treatment operators and/or technologies, should be answered a.s.a.p. – time to be agreed*
- *'info': e.g. information on better name for OUTPUT fraction, better choice of technology within same classification or similar*

Only you as the WEEE system / WF-RepTool access administrator / the controller may choose the 'level of relevance' and the 'status'.

⇒ below there is a text field for giving a **controller remark**.

At the **right** side (for the reporter) you will find:

⇒ a text field for **remarks** from the **reporter** where he may give any explanation on data to you,

⇒ an '**Answer status**' *scroll down* for the reporter distinguishing between 'open' and 'closed', 'open' is chosen as default value and the reporter may set to 'closed'. This shall indicate to you as WEEE system / WF-RepTool access administrator / controller if the specific remark is finished from the point of view of the reporter – see options to control, re-set in point 4.9.3.

The **date** and **name** of the controller / reporter who has set remarks / answers **most recently** is also shown for each remark. While the reporter didn't give any reply on the controller remarks, the term 'Reporter' will be shown. The controller's / reporter's phone number (if available – see users administration) is shown if you move the mouse over the name.

If the last modification of any remark was done in a previous report, additionally the **Id** of this **report** is shown in the info on the last modification.

The remark with a **red frame** indicates the user (controller or reporter) who has **most recently** modified the remark (see e.g. Chart 41, page 48).

In the 'list of controller remarks' the 'specific remarks' given for a report will be **sorted** to:

(1) 'open' remarks first

(2) within 'open' (and also in 'closed') sorting according to the '**level of relevance'** ('critical' > 'normal' > 'info')

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4.9.3. Checking answers of reporter remarks and hiding/deleting of controller remarks when finished

From time to time you will have to **check anwers** given by the reporter to your controller remarks. You may e.g. go to the 'list of controller remarks' (see Chart 41, page 48) by using the - icon in the header area the 'Overview' or in the 'List of available reports' (see Chart 39, page 46).

If there are **more than 3 remarks** for a report, you will find an - icon at the very right top of the controller remarks window (see Chart 41, page 48). Click this icon for the option to **find / filter** the remarks (see Chart 42 below). You may search for

⇒ **remark status** (from controller) – choose from all / open / closed,

⇒ the **priority** setting = level ofrelevance (from controller) – choose from all / empty / critical / normal / info

⇒ **answer status** (of reporter) – choose from all / open / closed

⇒ **controllers remark contains** or **reporters remark contains** - any text

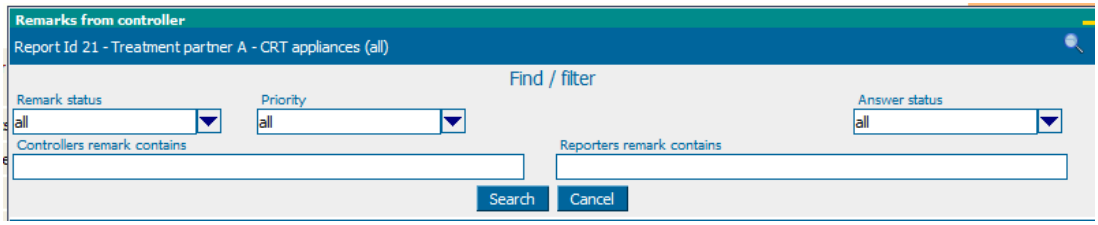

Chart 42: Find / filter options for controller remarks

Normally you will search/filter for the 'Answer status' (from the reporter) set to 'closed'. You may check adaptations done and information given and you may – if you are **satisfied** – **close** the remarks from your side ('Remarks status').

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If you are **not satisfied** with the answer, you may give any additional remark and you may **re-set** the 'Answer status' for the 'Specific remark' and – in case - the 'Answer status (all remarks)' (if set to 'done' by the reporter, you may re-set to 'in process').

You as 'system users' may also **edit reporter remarks**.

To keep the 'list of controller remarks' workable you may **delete** remarks after they are solved. You may choose between the options

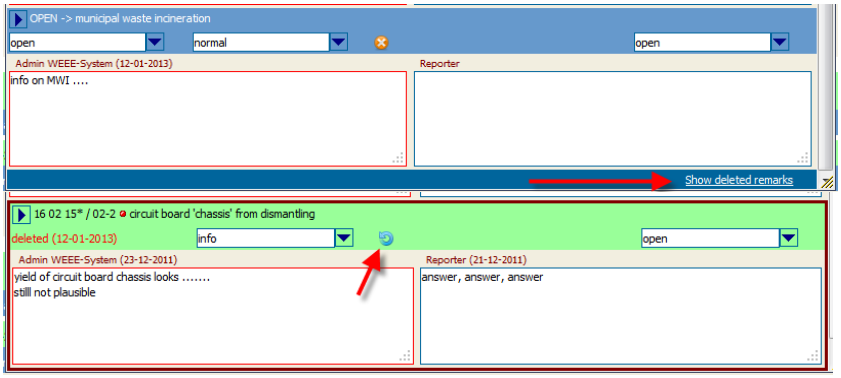
- 'Delete **all remarks** on report' – see - icon and
- 'Delete' **one** specific remark – see - icon (for both see Chart 41, page 48).

You have 2 options to delete a remark:

⇒ click the **orange - icon** to delete a remark by '**hiding**' the remark, with this the remark is just marked as deleted and may be reactivated later.

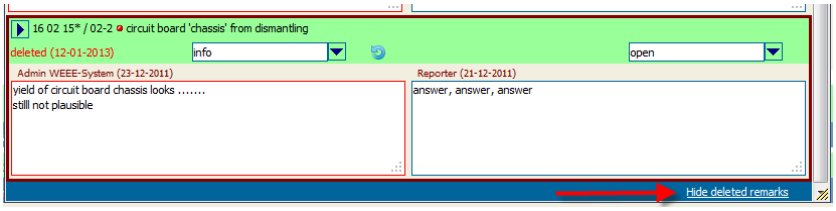
⇒ click the **red - icon** to **delete** the remark **irrevocably**, with this the remark is fully deleted and gone forever.

The **'Show deleted remarks'** – link at the bottom of the controller window (end of the 'list of controller remarks', see box beside) makes **all hidden** remarks **visible** again.



You may **reactivate specific remarks** with the - icon (see box beside).

Finally, you may also decide to **hide deleted remarks** again by using the **'Hide deleted remarks'** – link at the bottom of the controller window (end of the 'list of controller remarks') (see box beside).



Only you as 'system user' may hide/delete/reactivate remarks. The reporter will not see those icons.

If you ask yourself what happens with controller remarks on treatment steps being within a **confidential task**

- for 'system users' there is no difference to other remarks (see information on tasks above),
- the task 'receiver' only sees and may answer remarks on treatment steps within his task, he will never see other remarks on the report;
- the task 'sender' may not see nor answer remarks on treatment steps within the task.

Last but not least: What about '**Agents'** and remarks on reports of their **sub-contractors**? ('Pro' only). The answer is short: They have the same rights on the remarks as they have in general on the reports of their sub-contractors (see point 3.5.3.2, page 27).

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4.10. NEW19 Evaluation ('Pro' only)

4.10.1. Target of 'Evaluation'

The feature 'Evaluation' shall help the technical expert of the WEEE system or e.g. the charged controller to **check reports provided** by the treatment partners. The 'Evaluation' focuses on the **plausibility** of data entries like e.g.:

- is the delivery of any OUTPUT fraction to a chosen technology plausible?
- is any OUTPUT fraction coming out from a technology plausible?
- is the composition of any final fraction - in any final technology - plausible?
- is the classification of use of any component of a final fraction - in any final technology - plausible?

Compare with the '**Inspect'** feature / inspection rules (see point 3.7, page 33), with which the **completeness** of a report is checked (in the sense of 'are there entries in fields?').

With 'Evaluation' you will check **'combinations'** of entries used in **all/selected reports** provided. Having checked a combination once, you will be able to quickly identify entries which are 'not ok' (i.e. covered by 'evaluation rules') without checking report by report (see our internal former name of this feature: 'Self-learning tool').

The 'Evaluation' will not replace the control of individual reports for which you will set 'Controller remarks' (see point 4.9, page 45).

Only **system users** may set, modify and save the evaluation rules. Reporters may just see all 'combinations' occurring in their reports, the evaluation rules given and use them for correcting their reports or actions (see user manual - reporter level, point 15).

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4.10.2. Select content of 'Evaluation'

You have to start the Evaluation under the WF-RepTool access 'reptool' (see point 1.1, page 1) [not like for 'Inspection rules' under 'users'] and choose from the menu 'Summaries' the sub point 'Evaluation' [background: it is a 'Summary' of entries already done in reports on treatment results] – see box beside.

You will get an 'Select content' block in which you may do the choice for your evaluation – see Chart 43. If you **don't select** any **filter criteria**, all reports and combinations from last and current year are shown, but not reports excluded from summaries = **default setting**.

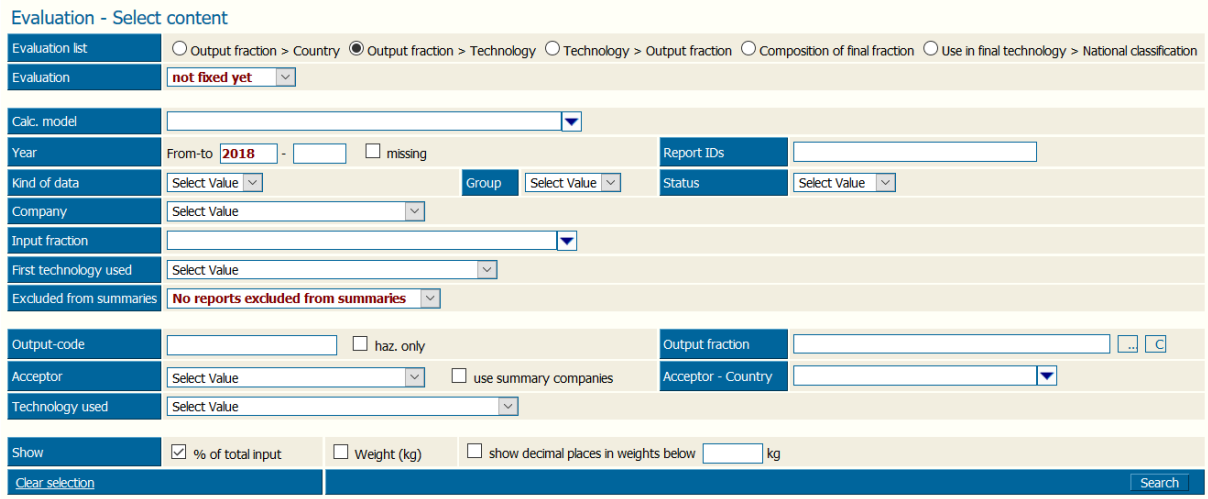

Chart 43: NEW19 Evaluation – Select content

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Evaluation options given up to now are (see first line ‘Evaluation list’, there might come additional ones in the future):

⇒ Output fraction > Country
⇒ Output fraction > Technology
⇒ Technology > Output fraction
⇒ Composition of final fraction
⇒ Use in final technology > National classification

- With **‘Output fraction > Country’** you will mainly check if OUTPUT fractions are delivered to countries abroad. In case it is not allowed to export by your national law or by other restrictions, in case not to export at all or not to any dedicated country.

  Hint: see option to filter the ‘Acceptor – country’ to get all combinations with ‘national market’ first and set to ‘ok’, then work with other combinations with ‘not fixed yet’; or filter the country where restrictions are given.

- With **‘Output fraction > Technology’** you will check if it is allowed or plausible that any OUTPUT fraction will be delivered to any technology, e.g. that a fraction classified as hazardous waste will be delivered to appropriate technologies being allowed to take over.

  Examples: PCB (suspect) capacitors delivered to a (regular) municipal waste incineration is not correct, they shall be delivered to a hazardous waste incineration; whole CRT tubes or large parts of CRT glass directly delivered to a road construction or any construction purposes is not plausible, they have to be delivered to glass grinding and cleaning.

  Hint: You may filter for output fractions classified as hazardous waste in the 'Select content' block by clicking 'haz. only' or any output fraction you are specially interested in by using the code or the fraction (see search and select in/with 3-dot field).

- With **‘Technology > Output fraction’** you will check if the output/yield from any technology is plausible. With the jumping option to reports (see later) you may more easy check if the output is complete (e.g. residues given).

  Example: dismantling fractions (code starts with 16) shall not be the result from shredder (except from pre-dismantling) or mechanical separation technology (see filter option for the 'Output-code' starts with 16, filter option for ‘Technology used’); on the other hand from dismantling only fractions starting with 16 (or 15) shall be the output, not fractions starting with 19 (see option to filter for the 'Technology used').

- The evaluation option **'Composition of final fraction'** will give a result of final fractions delivered to final technologies and composition data given for these final fractions. This evaluation option you will mainly use to check if **components** are **correctly chosen** and/or **plausible**.

  Examples:
  - if 'mixed fractions - disposal' is only applied for fractions delivered to a (special) landfill or to a municipal or hazardous waste incinerator, where there is no classification of the use necessary (as the classification of use as disposal is clear)
  - the component of any 'pure' e.g. plastics fraction is not given as 'other organic fractions' [it shall be the component 'plastics']."
  If the shares of components are correct/plausible you will have to check in the individual report by jumping to it - for example if any 'not pure' or mix-fraction is only given with one component like:
  ** 100% component 'plastics' from a plastics fraction 'not pure' [there shall be other shares of e.g. residues] or*
  ** 100% component 'other metals' in circuit board fractions [there shall be Cu, in case Al, Fe other metals and organic residues]*
  In this case you have to give individual controller remarks.

- The most critical evaluation option is '**Use in final technology > National classification'**. This evaluation option will give a result of final fractions delivered to final technologies, the chosen use in the final technology and the national classification for it. This evaluation option you will mainly use to check if the chosen **classification** of the use of any fraction/share of fraction is **correct** and/or **plausible**.

  To check for the national classification covers **both** the classification on base of the **model classification** of the WF-RepTool (as this classification is taken over to the national classification) or any change by the reporter to a different **national classification**. With this, this evaluation option can also be used to check the choice of the classification of use based on the WF-RepTool model classification.

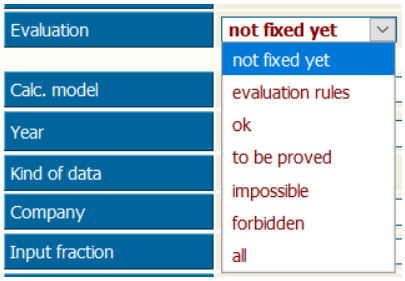
  The **calculation model** will be automatically set to the calculation model set as **default value** (see point 3.2.3, page 6) (see later).

  Examples:
  - the use of any shares of organics in any smelter may only be classified as recovery (energy recovery or other material recovery) if the smelter is classified as 'special', this technology has to be used [not smelter 'traditional'] [see the remark that the use of organics has to be approved]
  - the use of inorganics > use of slag = OMR has to be approved, you may do the choice 'to be proved' and give a controller remark on the necessary proof

For more information on the **correct use** of the WF-RepTool see the **'Guidance document – issues of harmonization**' at the WF-RepTool website under Information > Guidance documents (https://www.wf-reptool.org/index.php/faq-front/guidance-documents).

We recommend to start the evaluation procedure with the evaluation option 'Output fraction > Technology' (default setting) as it is an easy combination.

You will start 'with the **evaluation choice** (see 'Evaluation' in Chart 43, page 52) 'Not fixed yet' – see box beside.



Later you will be able to **filter** for **evaluations already done** with choosing **'evaluation rules'** (all combinations 'not ok'), any detail settings as e.g. 'forbidden' (and jump to reports still containing this combination with the given evaluation rule(s)) or to have a look at all combinations with 'all' – see box beside

The **calculation model** (see Chart 43, page 52) you only have to choose for the evaluation option 'Use in final technology > National classification' (see above). There it will be automatically set to the calculation model set as **default value** (see point 3.2.3, page 6) (nowadays it will be most time calculation model 2). You may choose the/any other calculation model via the scroll-down.

Next you should choose the **period** of reports (see Chart 43, page 52) you want to check - choose with entries in 'Year' - e.g. reports from the last 1-2-3 years.

Other entries / choices (see Chart 43, page 52) are **optional** but you may use them to e.g. **limit** the first working steps of evaluation by e.g. choosing **one treatment partner** or any dedicated **input fraction** you are special interested in or to look first to OUTPUT fractions classified as hazardous waste (use tick box 'haz. only').

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Two remarks on options to choose/filter (see Chart 43, page 52):

- If you wonder that the option to filter on **acceptors** is given although there is no list entry/column concerning acceptors in results from evaluation options, the filter option still makes sense as you might be specially interested in combinations coming from or going to a dedicated acceptor.
- Even more strange appears the additional option to include **'use summary companies'**. The background is the same as for acceptors, by using it, you get additionally all combinations coming from/going to all acceptors which are assigned to the selected acceptor (see assigned to on base of double entries, see point 3.5.4, page 30).

If you press 'Search', you will get all combinations of your **evaluation choice** (here 'Output fraction > Technology') **used in your reports** you have **selected** for the **evaluation** (here reports since 2010) (see Chart 44 lower area).

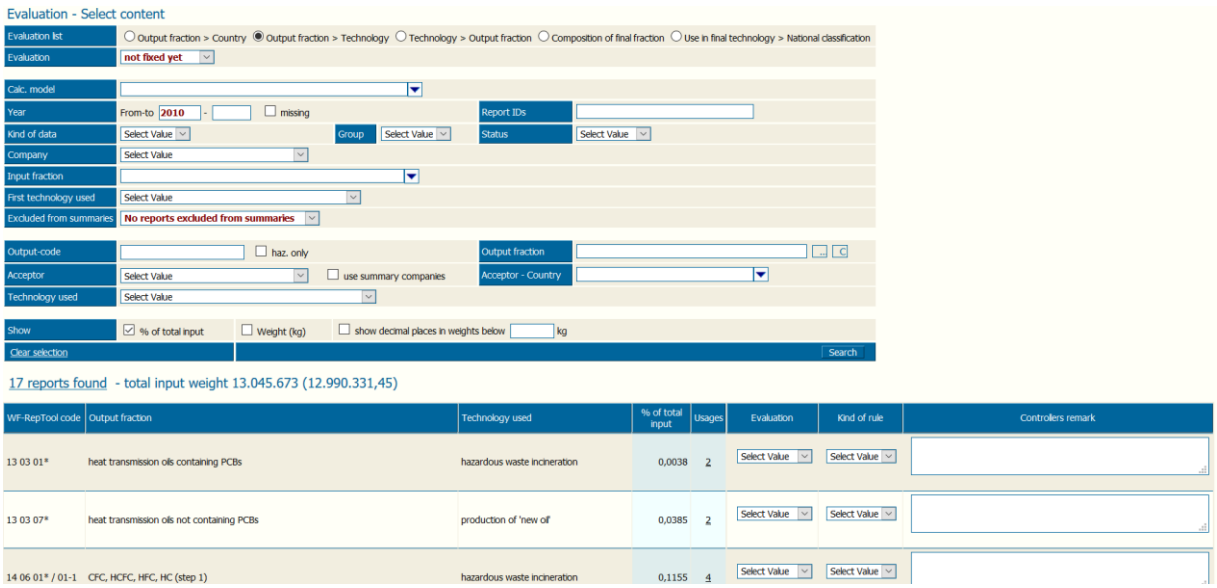

Chart 44: NEW19 Evaluation – all combinations

If you press '**Clear selection'** – see bottom line of the 'Select content' block -, you will come back to the **default setting** (see above). Also the choice of the Evaluation option will jump back to ' Output fraction > Technology', you may have to check and adapt.

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4.10.3. Doing the 'Evaluation'

Doing the 'Evaluation' work first time, you will get a quite long list with lines for all combinations done in chosen reports and with columns for entries based on the chosen evaluation option (see point before) and **three additional columns** for:

⇒ Evaluation
⇒ Kind of rule
⇒ Controller remarks

and **two 'assisting columns':**

⇒ % of total input or Weight (kg)
⇒ Usages

Entries in **'% of total input'** or **'Weight (kg)'** shall give you an indication on the mass relevance of this combination.

The figure in ‘**Usages’** shows you how often this combination has been used in your reports. If you click on the **number**, you will get a **list of reports** where this combination is used (might be quite long!). This list of reports is done as **links to jump** into the reports ‘Overview’, to the treatment step where the combination is used. The ‘Overview’ option to show 'Warnings from automatic inspection' is activated automatically and the warning is shown. This jumping feature gives you the option to look at the **context** in which this combination has been used.

Under **'Evaluation'** you may choose via the scroll down if a combination is:

- ok
- to be proved – e.g. an option is depending on e.g. quality criteria
- impossible - e.g. from technological aspect
- forbidden - e.g. by national law"

Under **'Kind of rule'** you may decide via the scroll down if a combination 'not ok' shall generate/result in:

- a warning
- a blocking"

Setting such a warning / blocking is not obligatory especially in case of the evaluation choice ‘to be proved’. At present both 'Kind of rule' options result in an inspection warning (see later). The option for 'blocking' is - at present - mainly foreseen as filter option. It is planned that the choice 'blocking' will result in more drastic actions like a more severe warning or that a report may not be set to 'done' (must be agreed as also reports already set to 'done' might contain a blocked combination).

When you work first time, fix all correct combinations as 'ok' and all others as you judge them as 'to be proved', 'impossible' or 'forbidden'. You should add a text for the reason of 'not ok' = your ‘evaluation rule’ in the column for **'Controller remarks'**.

Especially when doing an evaluation first time, the share of ‘ok’s’ will be high. For saving rules please see, that as soon as you modify anything, a 'Submit' and 'Cancel' button will be shown after every five lines. With 'Submit' the rule will be saved. This allows a 'quick go through' to save all the combinations being 'ok'.

For combinations 'not ok' = with ‘evaluation rules’ the automatic inspection will fire a **warning**, a red frame in the report-/package-/task-Graph and as 'Warnings from automatic inspection' in the 'Overview' (see Chart 45) or the 'Graph' (see Chart 46). The text you have given under 'Controller remarks' will be shown.

In general warnings resulting from evaluation rules are shown everywhere where warnings from 'normal' inspection (see point 3.7, page 33) have been shown till now. This is for example the listing of warnings under the menu point ‘Inspect’, in the ‘Graph’, in the ‘Overview’ (when 'Warnings from automatic inspection' is selected) and in PDF-Export files (if chosen).

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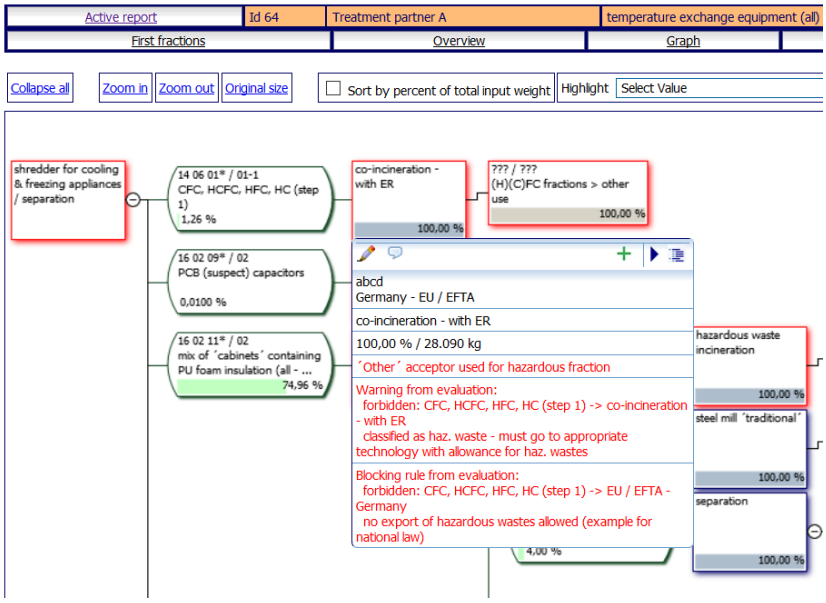

Chart 45: NEW19 Evaluation – warning in ‘Overview’

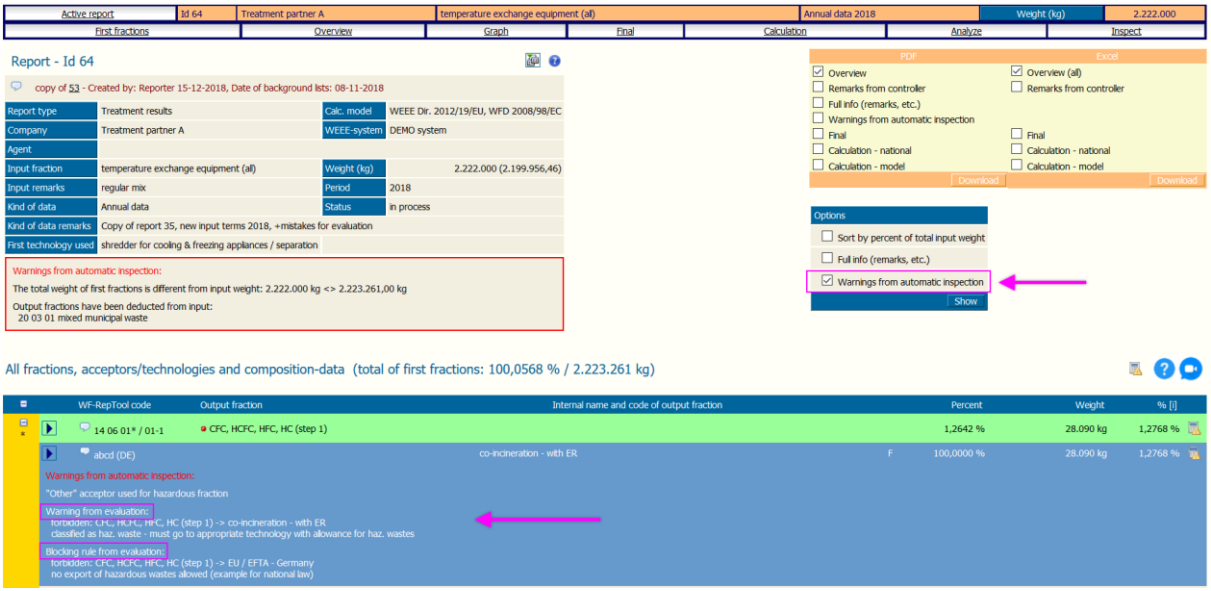

Chart 46: NEW19 Evaluation – warning in ‘Graph’

This 'long list' will be quite some work in the first year, but in the following years only new ‘combinations’ will appear under ‘not fixed yet’, all the other ones are handled automatically!

For **routine/the next years** go through combinations 'not fixed yet' and check the list of new entries e.g. once a year.

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4.10.4. Relevant aspects of the ‘Evaluation’ feature

- **Only combinations used** in **selected reports** are shown, not all combinations possible in general or not used.

  Example: one of your reports contains the combination PCB (suspect) capacitors going to municipal waste incineration → you fix this combination as 'forbidden' and give the controller remark that wastes/output fractions classified as hazardous waste may only be delivered to hazardous waste incinerators → your treatment partner will get the according inspection warning and says “ok, I shouldn’t do this” and corrects the technology to hazardous waste incineration → fine, the combination with regular municipal waste incineration doesn’t appear any more in any report, so you won’t see this combination rule in your list any more.

  Nevertheless, the evaluation rule for this combination stays in the background. So, if you have another treatment partner five years later using this combination, the rule is given and the automatic inspection will fire.

- Only entries with **all key fields** filled in or chosen are shown, other one’s (e.g. missing data inputs) are covered by 'normal' auto-inspection [i.e. if chosen under inspection rules, see point 3.7, page 33].

  Example: the list for 'Output fraction -> Technology' shows only output fractions where the technology is chosen in the following acceptor/technology-step. This rule also hits acceptor/technology-steps where the technology is not selected from the 'WF-RepTool standard technologies' (see background lists) but given in the 'other' field.

- Evaluation rules may only be **derived from reports**, but they are also **applied for** the inspection of **packages** and **tasks**.

- **Ad tasks**: for security reporters may not see combinations occurring in tasks in their ‘evaluation lists’ (listing of combinations + evaluation rules), even task receivers may not see the combinations from fulfilling of their own tasks. Nevertheless, task receivers using the auto-inspection for their tasks will see the warnings coming from evaluation rules in e.g. the ‘Overview’ or the ‘Graph’.

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4.11. Mailing feature ('Pro' only)

At various pages you will find an ✉ **- icon**, which allows you to send **report related e-mails** to your treatment partners directly from the WF-RepTool.

This feature is available only, if your WF-RepTool installation is configured accordingly (see point 3.2.8, page 11).

4.11.1. Use mailing feature in general

If you want to send an e-mail to the treatment partner responsible for a report, go e.g. to the report 'Overview' and click the ✉ - icon below the Report Id – headline (see Chart 47) and a 'Send mail' – page will appear (see Chart 47).

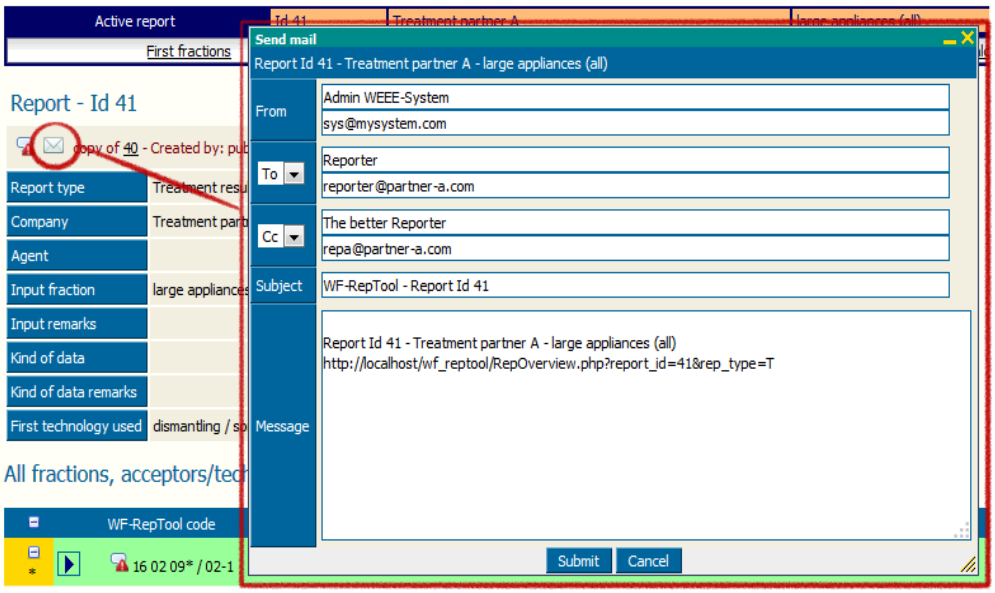

Chart 47: Send mail - page

In the example shown in Chart 47 the treatment company = report company has 2 users and their e-mail addresses are already pre-entered in the WF-RepTool administration tool. Just add the text you want to write into the 'Message' – field, press the 'Submit' - button and the e-mail will be sent.

If the e-mail address/es are not yet entered in the WF-RepTool administration tool, the address field/s will be empty. In this case you have to enter the e-mail address/es of the treatment partner.

With this the checkbox '*Save mail address in user data'* will be provided and will be clicked automatically as pre-setting (see box below). With this the address is saved for the future.

If the reporter uses this option (see 'user manual – reporter level') his address will also be saved too. You can use this as a kind of self-learning mechanism to collect e-mail addresses instead of entering them manually.

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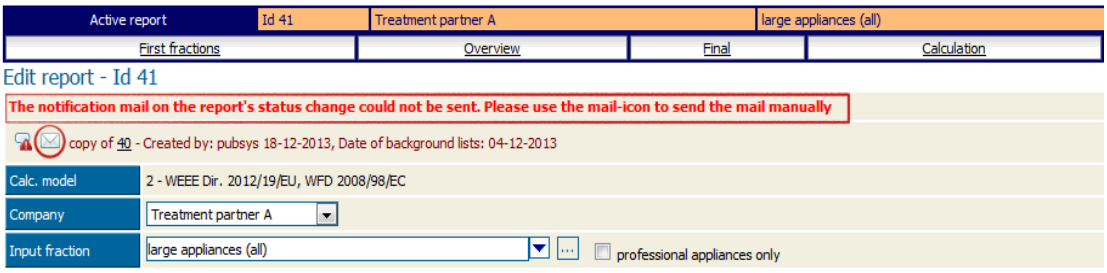
4.11.2. Use as notification mail on the change of report status

If you have activated this option in the configuration (see point 3.2.8, page 11), an automatic notification e-mail is sent from the user/s of the report company whenever he/she **changes** the **status** of a **WF-RepTool report**.

If all required e-mail addresses are entered correctly in the administration tool, the mail is sent **automatically**, you don't have choose & send it manually.

If one or more of the required e-mail addresses are **not available**, an **error message** '*The notification mail on the report's status change could not be sent. Please use the mail-icon to send the mail manually*' is shown (see box below).



Please follow this advice, click the - icon, and in the following window (like Chart 47) you may enter and save the address/es like explained in the point before.

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4.12. Fractions used

This is a function to sum up fractions used within WF-RepTool reports [of any WEEE system / WF-RepTool access administrator]. In a project in 2011 it was the target to count OUTPUT fractions used in any system.

If you click this menu point of the main menu of the 'Admin tool' (see Chart 1, page 3), there will be an Excel file generated which you may open or save under your directories.

The content of this Excel file will be:

- System – the identification code of your WEEE system / company
- output_id – the internal identification number of any OUTPUT fraction
- output_code – the WF-RepTool code of any OUTPUT fraction
- output_fraction – the name of any OUTPUT fraction
- delete_date – the delete date of any OUTPUT fraction
- input_id - the internal identification number of any INPUT fraction
- input_fraction - the code of any INPUT fraction
- technology_type – the technology type used for this fraction ('F' or 'I')
- count_used – counting of the use of this OUTPUT fraction (also 0-counts done)

This overview does **not** have any **specific function** for the WF-RepTool at present. We just kept it in for the case that you want to do an overview like this for your own use.

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5. WEEE Forum level ('Pro' only)

5.1. Target of the 'WEEE Forum level'

Background: The so called **'WEEE Forum level'** was all the time the planned **3rd level** of **using the WF-RepTool** (see e.g. Chart 1 in the 'user manual – reporter level').

The 'WEEE Forum level' has the purpose to **collect** treatment results of different WEEE systems / companies / WF-RepTool installations and shall give the option to **compare**, **analyse** and **sum up** data from various WEEE systems / companies inside the WEEE Forum (and - in case from - 'outside users'). Target is to compare data / results with each other, exchange of experiences, do e.g. totals for the WEEE Forum, etc..

For this purpose, the WEEE system / WF-RepTool access administrator can send **selected reports** from its installation to the WF-RepTool server.

*In summer 2008 a test of this application has been done with volunteers of the WEEE Forum members. For this test period access administration has been done by the WF-RepTool development team and first data were compared – since this time the approach to collect and compare treatment results at WEEE Forum level has been **stopped / postponed / ...***
Please check for new approaches with the WF-RepTool expert group or the WEEE Forum.

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5.2. Data sent to the WEEE Forum server / WF-RepTool server

First of all, and for sure **nothing is 'stolen'** automatically from your installation! As long as you don't explicitly send data like described below, nothing leaves your server and/or your WEEE Forum sector.

When you decide to send reports, only **technical information** is transferred, which means:

- input data
- output fractions
- technologies used
- final components and their use in final technologies

No information about the **names** of your treatment partners and acceptors mentioned in the report will be sent.

Also, the **name** of your WEEE system / company will **not appear** in the WEEE Forum server / WF-RepTool server application but a **code** will be given / used.

The **name** of the WEEE system providing information will be saved in the **database**. This is for giving the WEEE Forum office the chance to act as a **'black box'**. So if you will detect 'interesting data' in the 'WF-RepTool - WEEE Forum level application' for 'WEEE system / WF-RepTool access administrator code xy' you may call the WEEE Forum office and it will try to arrange 'bilateral' contact to the system where data is coming from.

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5.3. How to send data to the WEEE Forum level

In the 'Admin tool' you will find a new 'WEEE Forum level' – button in the main menu (see Chart 1, page 3)

Remark from IT: under certain server configurations it might happen that you have to login again after pressing the 'WEEE Forum level' – button. Please don't be afraid, just type in your administration login and - password again and everything will work normally.

If you choose this button, you find a 'Please select reports for transfer to WEEE Forum level' - block on the following page (see Chart 48) with the selection criteria for reports generally used (Input fraction, Kind of data, etc.).

Chart 48: WEEE Forum level – choice of reports

Two remarks on this:

- the selection is automatically **restricted** to reports set to **'done',**
- **also** reports marked as **'excluded from summaries'** may come into the selection, the reason for this is, that you maybe have generated an 'extra' 'summary report' ('Pro' only) (see 'user manual - reporter level' Chapter 10, version 2013) for transfer purpose only and you marked this as 'exclude from summaries' for not destroying your general WF-RepTool 'Summaries').

After clicking the **'Search'** - button (see Chart 48) in this selection block, you will get a list of reports fulfilling the selected criteria (see Chart 49).

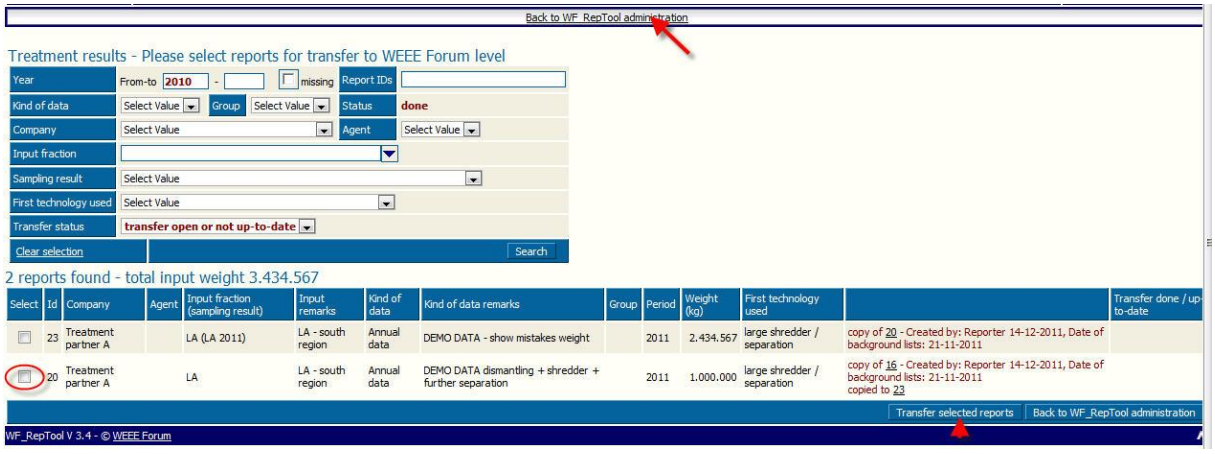

Chart 49: WEEE Forum level – select reports for transfer

Click the **checkboxes** at the **left side** of the list for all reports you want to send (see Chart 49, left side red circles) and press the 'Transfer selected reports' - button (see Chart 49, bottom line).

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For a **last check** a box ***'Are you sure that you want to transfer ...'*** will pop up at your screen. Please **confirm** with 'Ok' and the reports **will be sent.**

At any time you may come back to the 'WEEE Forum level' and you may **see all reports** including those already transferred to the WEEE Forum level by choosing the 'Transfer status' 'all' (see Chart 50, last line of selection block) and you will see an information about when your transfer was done in the very right column (see Chart 50).

Chart 50: All reports – including info sent to WEEE Forum level

When you have finished transferring reports to the WEEE Forum level you may use the 'Back to WF-RepTool administration' - button on top of the page (see Chart 49) or in the bottom line (see Chart 50) to continue with other administration issues.

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6. ‘History list’ = Automatic protocol of changes (‘Pro’ only)

All explanations here are very much ‘IT specific’ and will therefore not be changed by the editor of this ‘user manual – system level’. They are kept as given from IT development (see shown in Italian style).

For any **questions** on this automatic protocol please refer the WF-RepTool **IT developer** – see point 2, page 1.

*With this version 3.1.01 all page-requests and database-operations are protocolled in the database. You can access this protocol via the new ‘**History list**” button in the administration tool – as this page needs some internal knowledge of the WF-RepTool, please find some explanations in following:*

Usage of fields in Filter history list:

- *Company -> this filters all protocol-entries done by users registered with the selected company. Be aware -> this does not mean, that you get only entries on reports of this company, especially you’ll find also your system in the selection-list to filter all changes done by system-users;*
- *User -> this filters all protocol-entries done by the selected user;*
- *Request kind -> the most interesting option here is ‘modification only’ to filter all protocol-entries resulting from modification of data;*
- *Done since -> use the fields from left to right, e.g. ‘yyyy = 2009’ with following fields left blank finds all changes done since beginning of 2009 (of course only since installation of this version)*
- *Page / action -> here you find a selection of core WF-RepTool-features to filter all protocol-entries resulting from those features;*
- *Sql query type -> use this to filter on INSERT-, UPDATE- or DELETE-operations resp. All other operations;*

The columns shown in the history list are partly related to the communication between Internet-browsers and –servers (watch the URL-field of your browser while performing WF-RepTool-operations and especially the ‘Request’-columns as well as the GET-/POST-parameters in the details for the protocol-entries will tell you a lot) and partly SQL-related (those need SQL-knowledge):

- *Request ID -> in some lines you will find the internal protocol-ID for a page-request, in some lines this column is empty; the meaning is, that all lines with empty column represent database-operations done during the same page-request as shown in the line with an ID above;*

  e.g. creating a summary-report is one page-request causing a lot of database-operations -> in the first line you will find the ID of this page-request and in the following lines all operations caused by this request;
- *With the icon in the next column you can show/hide the details for the protocol-entries:*
  - *GET parameters -> those are the parameters handed over via the URL-field of the users Internet browser*
  - *POST parameters -> here you find the values entered by the user in the fields of the requested page*
  - *Sql query -> shows the SQL-statement done*
  - *Database error -> shows a message, if any database-error occurred during this operation*
- *Company, User and Date explain themselves*

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- *Request page -> the name of the requested page as handed over via the URL-field of the users Internet browser*
- *Request method -> 'POST' for all page-requests where the user submitted any data within input fields, 'GET' for page-requests where just anything is shown*
- *Sequence tag -> this corresponds to the 'Page / action"-field in the Filter-dialog (e.g. 'delete_report' marked all DB-operations done for deleting a report)*
- *Sql query kind -> 'exec' for stands for Sql-statements modifying data, lines where this column is empty represent a page-request without modifying database operations; a third theoretic value 'query' stands for Sql-statements only retrieving data from the database is never shown, cause those statement are not protocolled for the while because of performance reasons;*
- *Sql query type -> shows the first word of the Sql-statement done*
- *Affected rows -> shows the number of database-records modified by the Sql-statement done*
- *The 'Cancel" button on bottom of the list is reserved for future extension and does just nothing for the first*

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