



## The OCP User Manual

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### Welcome to the Online Claims Platform

*FSC International and Historic Futures are pleased to announce that the OCP is available for test and we are very interested to hear your feedback.*

OCP stands for Online Claims Platform. It is a platform for FSC certificate holders, where transactions of FSC certified products are recorded. In short, the customer of FSC certified products enters the FSC claim from their suppliers invoice into the OCP. These entries are then confirmed by the suppliers, ensuring that the claim is agreed as accurate by both parties.

This **User Manual** provides the instruction you need to be able to use the OCP.

For more background on the OCP, please go [here: ocp-info.fsc.org](http://ocp-info.fsc.org).

### Providing Your Feedback

Feedback from users is critical so that the platform can be updated and improved. After spending time learning how the OCP works, please take 3-5 minutes to fill out the appropriate surveys.

#### Surveys available:

Registration: <https://www.surveymonkey.com/s/OCPRUC>

Entering Claims: <https://www.surveymonkey.com/s/OCPClaims>

OCP support: <https://www.surveymonkey.com/s/OCPSupport>



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## Getting Started

### Two ways to use the OCP

Users can choose to use the “demo” or “live” version of the OCP.

The demo version is a testing version of the OCP where you can test the OCP features and functions. In the demo, you can connect to your actual suppliers but they will not receive email notifications.

- ① Note: the Demonstration version will periodically be refreshed. This will remove **all** of your OCP account information. After a refresh, you will need to reregister and reconnect to suppliers. This will give you a fresh slate for entering claims.

The live version is the actual OCP where all connections and data are stored and viewable by your individual connected trading partners.

- ① Note: both versions have a “test supplier” account that users can connect too and enter test claims.

### Features of the two versions of the OCP

Version	Demo OCP	Live OCP
<b>Address</b>	<a href="https://ocp-demo.fsc.org">https://ocp-demo.fsc.org</a>	<a href="https://ocp.fsc.org/">https://ocp.fsc.org/</a>
<b>Effective date</b>	Feb. 3 <sup>rd</sup> 2014	Apr. 1 <sup>st</sup> 2014
<b>Function</b>	Email notification is turned off Update of account info being developed	Fully functional
<b>Data</b>	Data entered will be deleted periodically and considered not real.	Data remains in the system and won't be deleted.
<b>Supplier Accounts</b>	Users + “test supplier” account available for users to test: Beta-COC-000001.	Users + “test supplier” account available for users to test: Beta-COC-000001.

## Three Steps of using the OCP



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If you hold a FSC certificate, an account is automatically created for you to activate.

Quick guide:

[How to sign up to use the OCP?](#)

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The OCP will automatically send the claim to your supplier for verification.

Quick guide:

[How to connect with Suppliers?](#)

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Once connected, you are ready to start entering claims based on the FSC invoices you have received.

You will only be required to enter the information you are already collecting as part of your FSC certification.

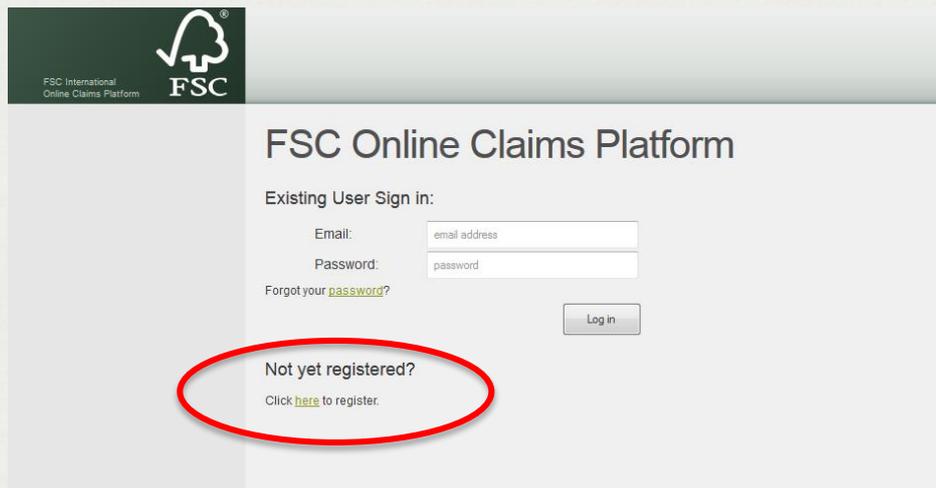
Quick guide:

[How to enter claims?](#)

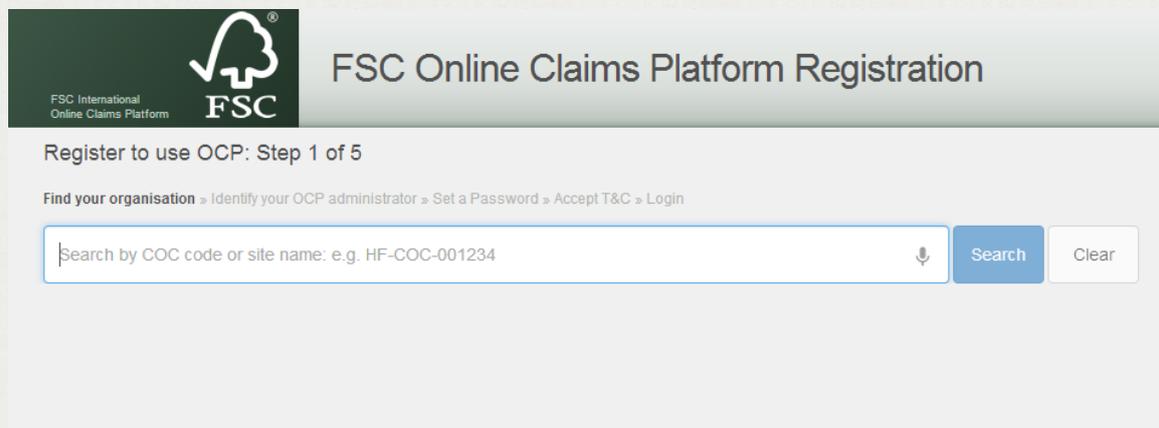
## Registration – How to sign up to use the OCP

### Step 1 – Access the OCP and find your organization

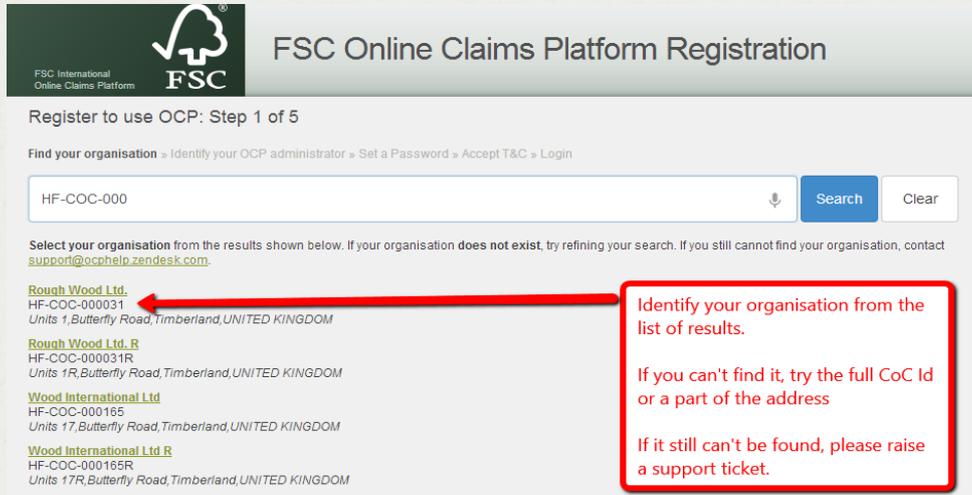
- **For the Demo version:** In your Internet browser enter <http://ocp-demo.fsc.org> into the address bar
- **For the Live version:** In your Internet browser enter <https://ocp.fsc.org/>.
- Navigate to the “**Registration**” page:



- Search for your organisation using either your Certificate Code or the site name: e.g. XX-COC-XXXXXX



- Select your organization from the list of results.

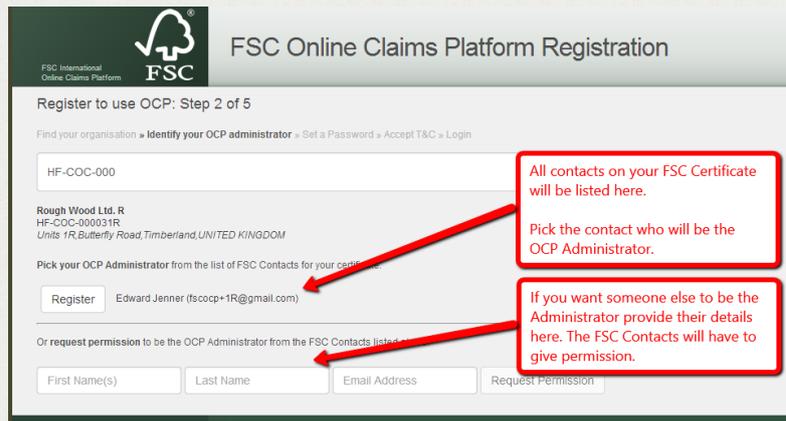


The screenshot shows the 'FSC Online Claims Platform Registration' interface. At the top, it says 'FSC International Online Claims Platform' and 'FSC'. Below this, it indicates 'Register to use OCP: Step 1 of 5'. A progress bar shows 'Find your organisation' as the current step, followed by 'Identify your OCP administrator', 'Set a Password', 'Accept T&C', and 'Login'. A search bar contains the text 'HF-COC-000' and has 'Search' and 'Clear' buttons. Below the search bar, a list of search results is displayed, including 'Rough Wood Ltd.', 'Rough Wood Ltd. R', 'Wood International Ltd', and 'Wood International Ltd R'. A red arrow points from a red-bordered box on the right to the first result, 'Rough Wood Ltd.'. The red-bordered box contains the following text: 'Identify your organisation from the list of results. If you can't find it, try the full CoC Id or a part of the address. If it still can't be found, please raise a support ticket.'

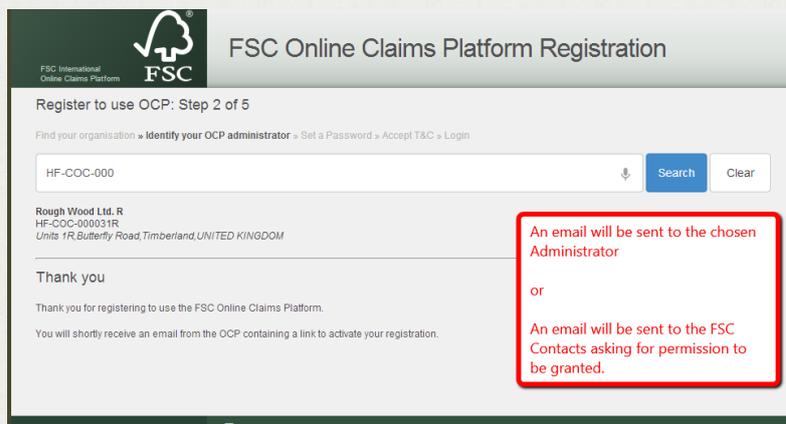
- If you cannot find your organization, please contact the OCP Support Team by submitting a support ticket: [http://ocp-help.fsc.org/anonymous\\_requests/new](http://ocp-help.fsc.org/anonymous_requests/new).
- Multi-site certificate holders can register all sub-codes and assign administration rights ([see Page 28](#)) to the sub-code accounts.

## Step 2 – Identify your OCP administrator

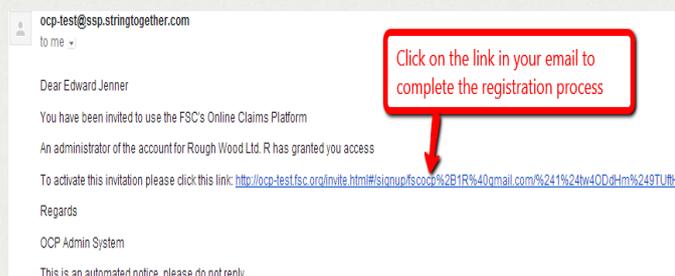
- Select the contact person who will be the OCP administrator and click **“Register”**  
OR
- You can request to register with an alternative email address. Fill in appropriate boxes at the bottom with details and then click **“Request Permission”**. The FSC contact that is associated with your certificate will have to provide permission for others to register or use the system.



- An email will be sent to the chosen administrator or to FSC contact asking for permission to be granted.

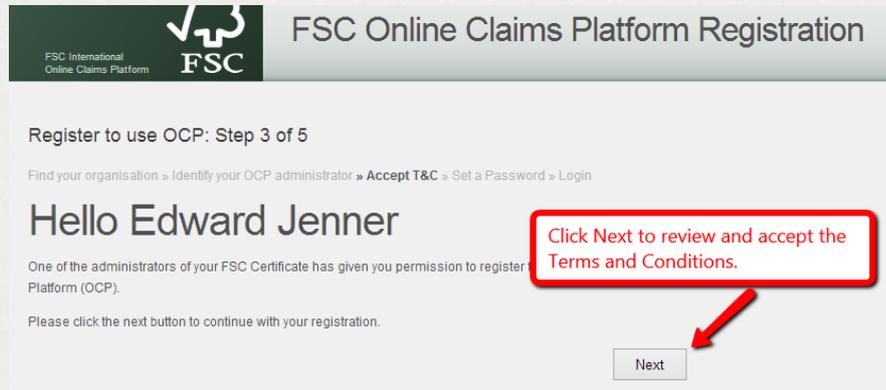


- Click on the link in the email to activate the account.

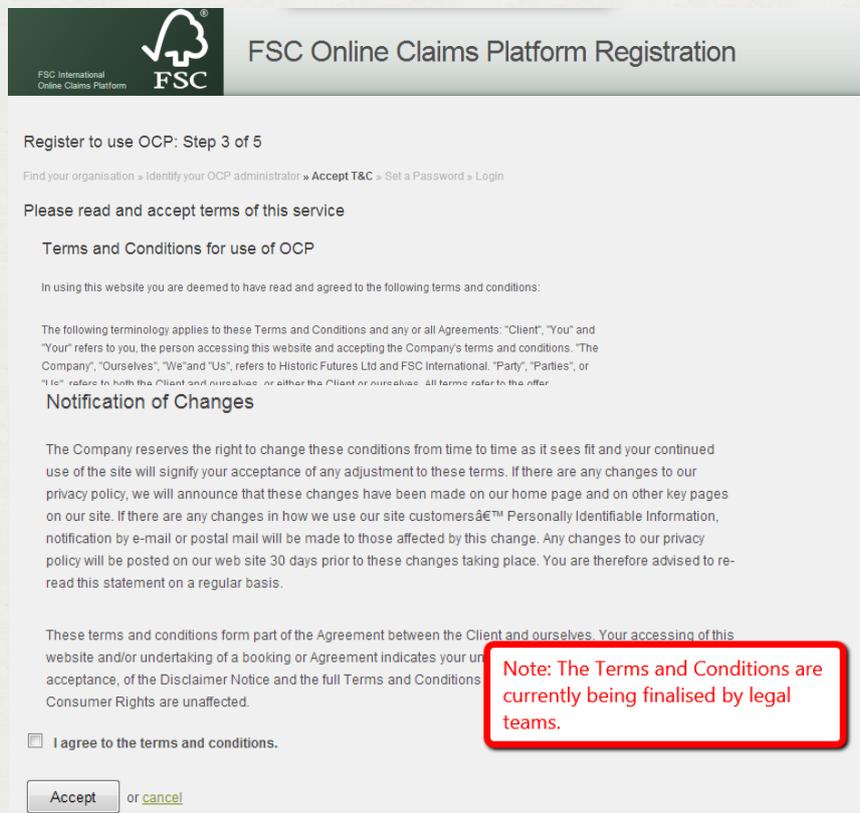


### Step 3 – Accept Terms and Conditions of Use (T&C)

- Click “Next” to review the Terms and Conditions.

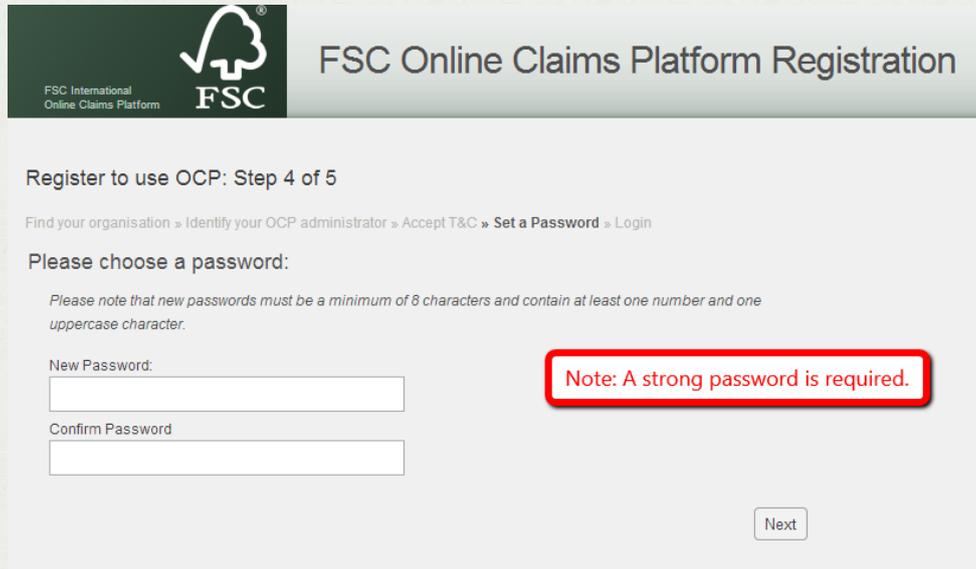


- Click “Accept” if you agree to the Terms and Conditions and proceed to the next step.



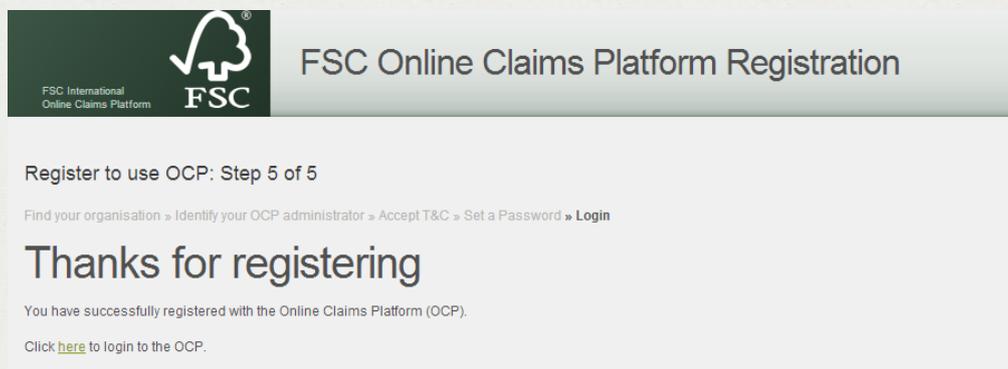
## Step 4 – Set a password and log in for the first time

- Choose a password and confirm. Passwords must be a minimum of 8 characters and contain at least one number and one uppercase character.



The screenshot shows the registration process for the FSC Online Claims Platform. The header includes the FSC logo and the text 'FSC Online Claims Platform Registration'. Below the header, it says 'Register to use OCP: Step 4 of 5'. A breadcrumb trail reads: 'Find your organisation » Identify your OCP administrator » Accept T&C » Set a Password » Login'. The main instruction is 'Please choose a password:'. A note states: 'Please note that new passwords must be a minimum of 8 characters and contain at least one number and one uppercase character.' There are two input fields: 'New Password:' and 'Confirm Password:'. A red-bordered box contains the text 'Note: A strong password is required.' A 'Next' button is located at the bottom right of the form area.

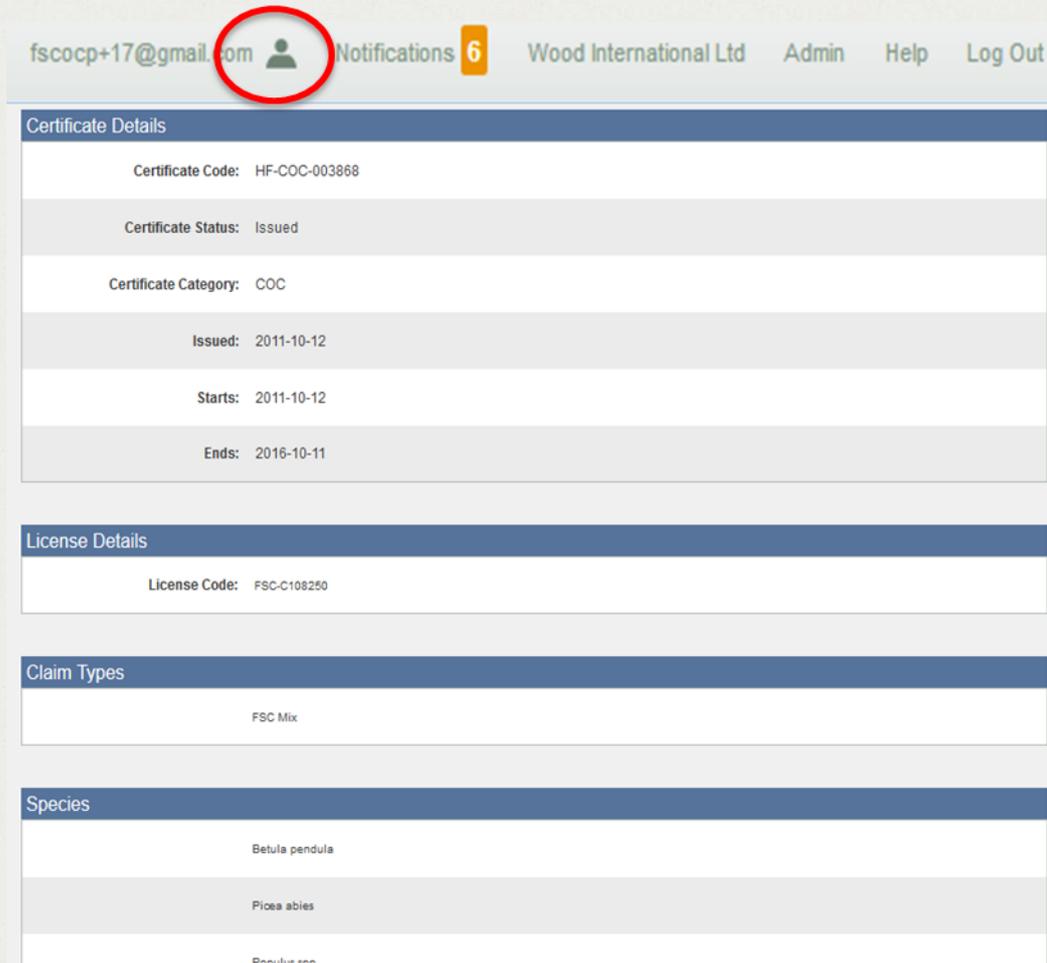
- Now your registration is completed! You will be able to login using the email address used to set up the account and the password you created.



The screenshot shows the final step of the registration process. The header includes the FSC logo and the text 'FSC Online Claims Platform Registration'. Below the header, it says 'Register to use OCP: Step 5 of 5'. A breadcrumb trail reads: 'Find your organisation » Identify your OCP administrator » Accept T&C » Set a Password » Login'. The main heading is 'Thanks for registering'. Below this, it says 'You have successfully registered with the Online Claims Platform (OCP)'. At the bottom, it says 'Click [here](#) to login to the OCP.'

## Verifying Account info

- Navigate to “**Account**” tab to view your certificate information:



The screenshot shows a user interface for account verification. At the top, there is a navigation bar with the email address 'fscocp+17@gmail.com', a profile icon circled in red, a 'Notifications 6' badge, and links for 'Wood International Ltd', 'Admin', 'Help', and 'Log Out'. Below the navigation bar, there are four sections: 'Certificate Details', 'License Details', 'Claim Types', and 'Species'. Each section contains specific information related to the user's account.

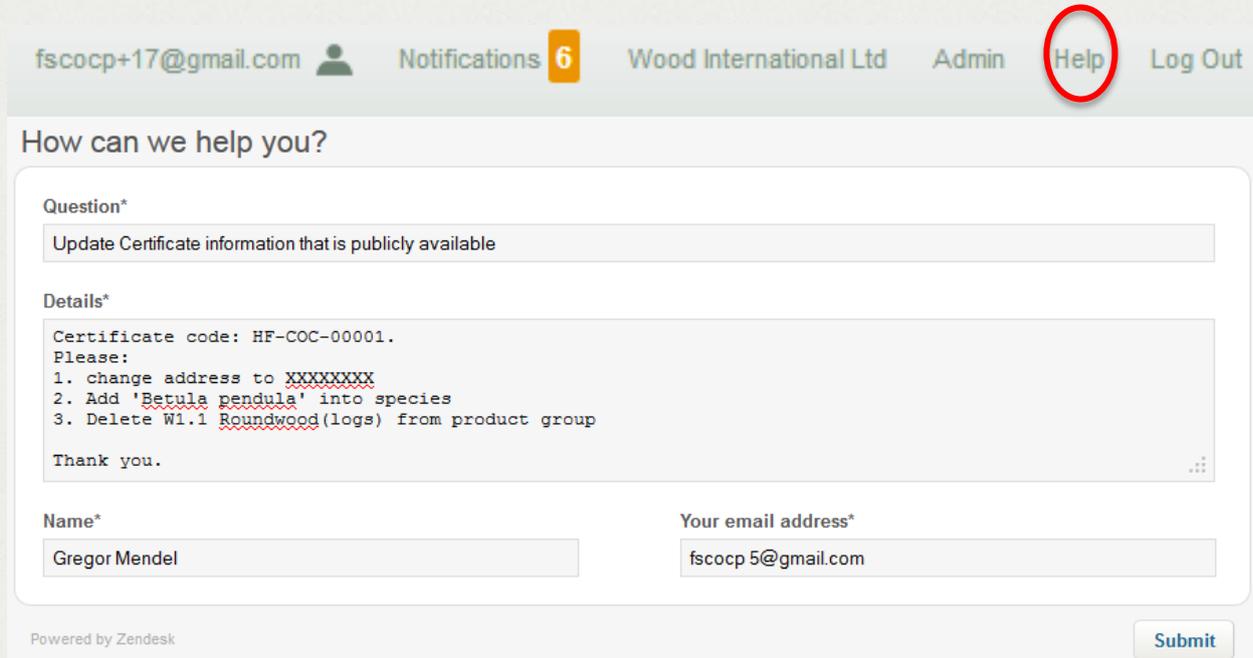
Certificate Details	
Certificate Code:	HF-COC-003868
Certificate Status:	Issued
Certificate Category:	COC
Issued:	2011-10-12
Starts:	2011-10-12
Ends:	2016-10-11

License Details	
License Code:	FSC-C108250

Claim Types	
	FSC Mix

Species	
	Betula pendula
	Picea abies
	Populus spp.

- To update your certificate information, navigate to “**Help**” tab and submit a support ticket.
- Give a brief description of your request including your certificate number.
- Your certification body will be contacted to update your certificate information found in info.fsc.org.  
📄 Feature being developed



The screenshot shows a user interface for submitting a support ticket. At the top, there is a navigation bar with the following items: 'fscocp+17@gmail.com' (with a user icon), 'Notifications 6' (with a notification icon), 'Wood International Ltd', 'Admin', 'Help' (circled in red), and 'Log Out'. Below the navigation bar is a section titled 'How can we help you?'. This section contains a form with the following fields:

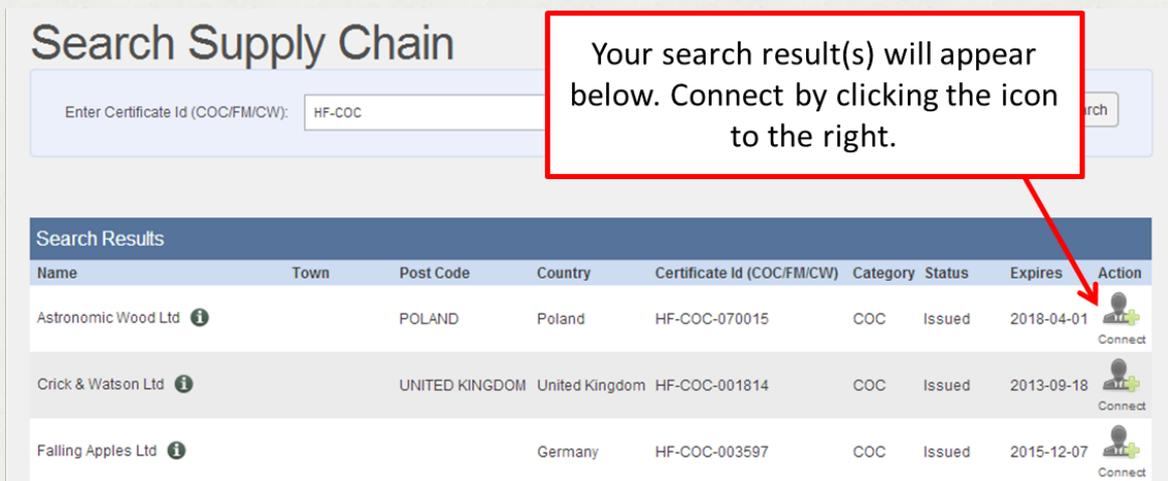
- Question\***: A text input field containing the text 'Update Certificate information that is publicly available'.
- Details\***: A text area containing the text: 'Certificate code: HF-COC-00001. Please: 1. change address to XXXXXXXX 2. Add 'Betula pendula' into species 3. Delete W1.1 Roundwood (logs) from product group Thank you.' There are red squiggly lines under the words 'Betula pendula' and 'Roundwood'.
- Name\***: A text input field containing the text 'Gregor Mendel'.
- Your email address\***: A text input field containing the text 'fscocp 5@gmail.com'.

At the bottom left of the form, it says 'Powered by Zendesk'. At the bottom right, there is a blue 'Submit' button.

## Managing Connections

### Connecting with suppliers by sending an invitation:

- Navigate to the **“Supply Chain”** tab and search for your suppliers by FSC certificate codes.
- Identify the correct organization and click on **“Connect”** icon.



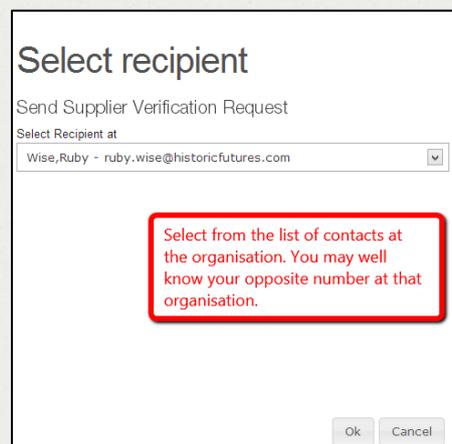
Search Supply Chain

Enter Certificate Id (COC/FM/CW): HF-COC

Your search result(s) will appear below. Connect by clicking the icon to the right.

Name	Town	Post Code	Country	Certificate Id (COC/FM/CW)	Category	Status	Expires	Action
Astronomic Wood Ltd		POLAND	Poland	HF-COC-070015	COC	Issued	2018-04-01	 Connect
Crick & Watson Ltd		UNITED KINGDOM	United Kingdom	HF-COC-001814	COC	Issued	2013-09-18	 Connect
Falling Apples Ltd			Germany	HF-COC-003597	COC	Issued	2015-12-07	 Connect

- From the dropdown list of contacts, select the name of the person in which you would like to send the connection request.



Select recipient

Send Supplier Verification Request

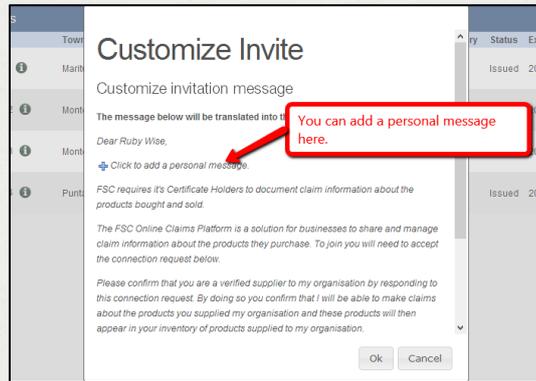
Select Recipient at

Wise, Ruby - ruby.wise@historicfutures.com

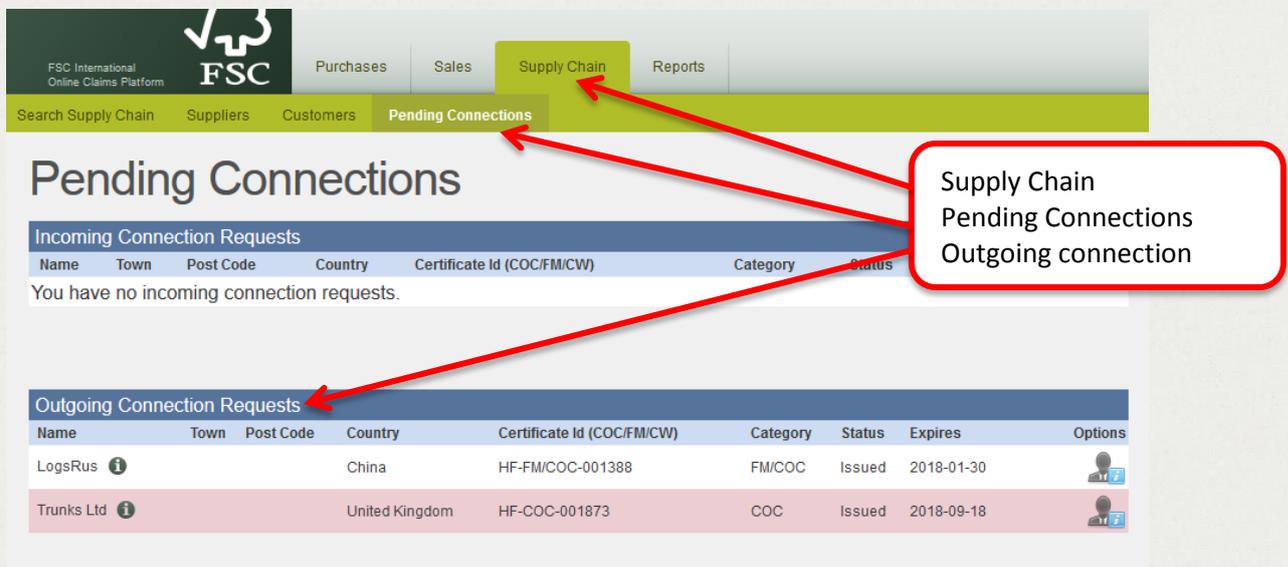
Select from the list of contacts at the organisation. You may well know your opposite number at that organisation.

Ok Cancel

- Send the generic invitation or add a personal message by clicking the “+”.



- A notification will be sent to your supplier’s OCP account and their email address.
- Click “Pending connections” to view the status of your “outgoing connection requests”.

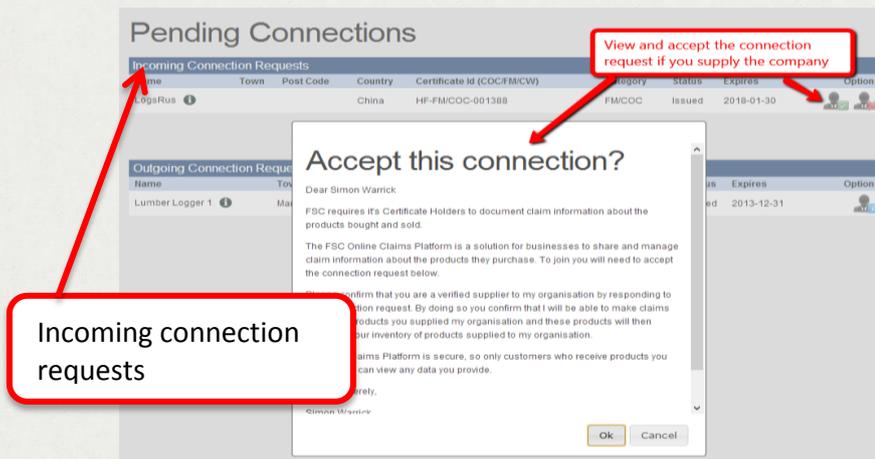


- Once your supplier accepts the request, in the future you will be notified of all changes in the scope or status of their FSC certificates in near real time.<sup>1</sup>

<sup>1</sup> FSC-STD-40-004\_V2-1 Chain of Custody standard: 3.2 Supplier Validation

**Accept connection request invitations from your customers:**

- Login and click **“Pending Connections”** to view the status of your incoming connection requests.
- View and accept or reject the connection requests at **“Incoming Connection Requests”**.



**Allow suppliers to Record claims:**

In some supply chains it is more pragmatic for the supplier to enter the claim.

- ① To record sales claims, consent from both trading parties is required.

Click **“Supply Chain”**, then **“Suppliers”**, then check the **“Make Claims”** box to allow your supplier to enter their FSC sales to you.

Existing Suppliers									
Name	Town	Post Code	Country	Certificate Id (COC/FM/CW)	Category	Status	Expires	Make Claims	Remove
Astronomic Wood Ltd			Poland	HF-COC-070015	COC	Issued	2018-04-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Allow Supplier to record claims

**Deleting Connections**

Click **“Supply Chain”**, then **“Suppliers”** (or **“Customers”**), find the correct organization, and then click on the **“Remove”** icon.

Existing Suppliers									
Name	Town	Post Code	Country	Certificate Id (COC/FM/CW)	Category	Status	Expires	Make Claims	Remove
Astronomic Wood Ltd			Poland	HF-COC-070015	COC	Issued	2018-04-01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## About the OCP “Test Supplier” Account:

In the OCP, the “Test Supplier” account is a private account that any certificate holders can connect to in order to test any features of the OCP. This is a good first step to learn about how the OCP works.

There are two ways you can test the OCP using the “Beta Test supplier” account. You can choose to connect to the “Beta Test Supplier” account in the “**demo**” version or start using the “**live**” version of the OCP.

The Test Supplier, named “**Beta Test Supplier**”, can be found by searching “**Beta-COC-000001**” on the “**Supply Chain**” connections screen.

### Search Supply Chain

Enter Certificate Id (COC/FM/CW):  Additional Information:   Search

Search Results									
Name	Town	Post Code	Country	Certificate Id (COC/FM/CW)	Category	Status	Expires	Action	
Beta Test Supplier 		5107 Bocono	Venezuela	BETA-COC-000001	COC	Issued	2016-08-29	 Connect	

1

Once you issue a connection request to this supplier, the OCP will accept the connection as if it was a real connection.

Once the connection has been made, the customer can record fictitious claims as if they had been made by this supplier. The OCP will then regularly accept these claims, acting as the Test Supplier. These claims will appear in the users reports as if it was real data, but notated as test data. This data can be deleted at any time by the user.

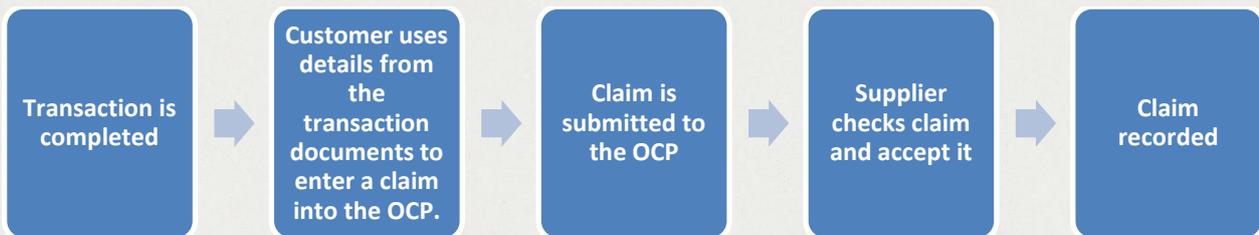
### Test Supplier Details

The account will be configured as a certificate holder with a Controlled Wood Risk Assessment in their scope, as this will illustrate the additional data that is required to be captured for such suppliers ([Appendix 1](#)).

## Entering Claims

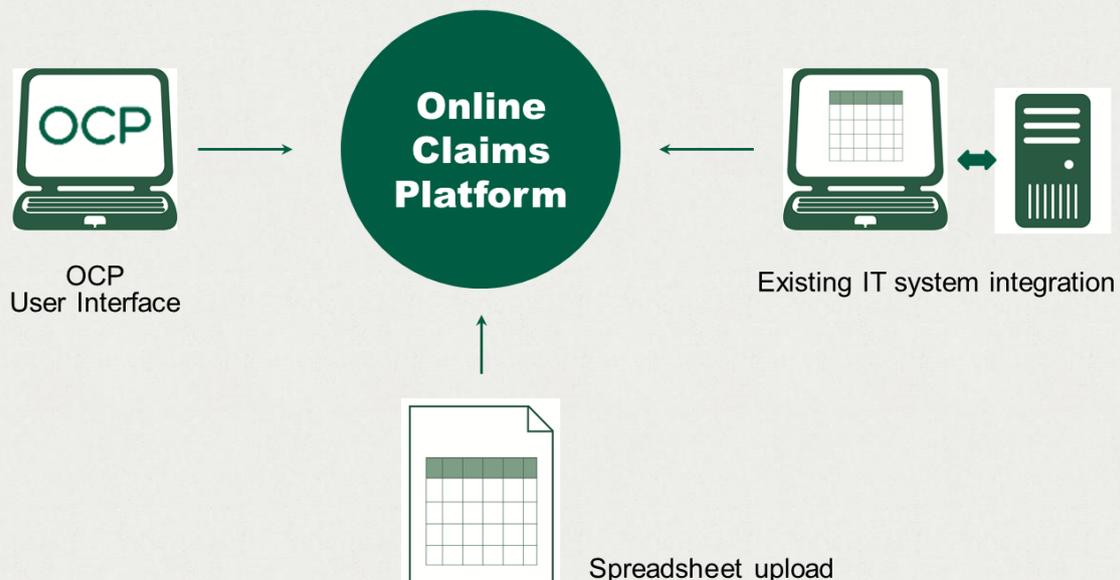
### Overview

There are three methods you can choose to use when recording a claim in the OCP. The process of recording a claim varies slightly depending on which method you choose to use. However, all three methods follow the same basic pattern as shown in the diagram below.



- ① Note: You can choose to **Consolidate** or **Lump** similar claims. This means, that if you buy the same product from the same supplier multiple times, you can consolidate all of those claims into one monthly entry.

### Three methods of entering claims:





### User Interface (UI)

The User Interface (UI) is an online claim form accessed via the “Record Claims” tab under “Purchases” or “Sales”. On this page you are presented with a series of boxes to complete with information regarding the transaction you wish to record. As you populate the form, you will be given drop down options that correspond to your supplier’s certificate.

### Spreadsheet Processor (SSP)

The Spreadsheet Processor (SSP) involves downloading a spreadsheet from the OCP into which you can enter multiple claims. You can then either upload or email the spreadsheet to the OCP. The details will be checked against your suppliers’ certificate information. If anything has been entered incorrectly, you will be emailed back a new spreadsheet containing only the claims that were found to have errors.

### Application Programming Interface (API)

The API is a mechanism that allows direct integration of IT systems to the OCP system. Claims are sent over the Internet in JSON format. API Keys will be issued to any organisation who requests to use the system.

Method:	Suited to:
UI	<ul style="list-style-type: none"><li>• Small quantities of transactions</li><li>• Transactions with few line items</li><li>• Recording claims from single suppliers</li></ul>
SSP	<ul style="list-style-type: none"><li>• Larger volume of transactions</li><li>• Recording claims from multiple suppliers at once</li></ul>
API	<ul style="list-style-type: none"><li>• Businesses wishing to integrate the OCP into their own systems or existing workflows</li><li>• Large quantities of transactions</li></ul>

## User Interface (UI)

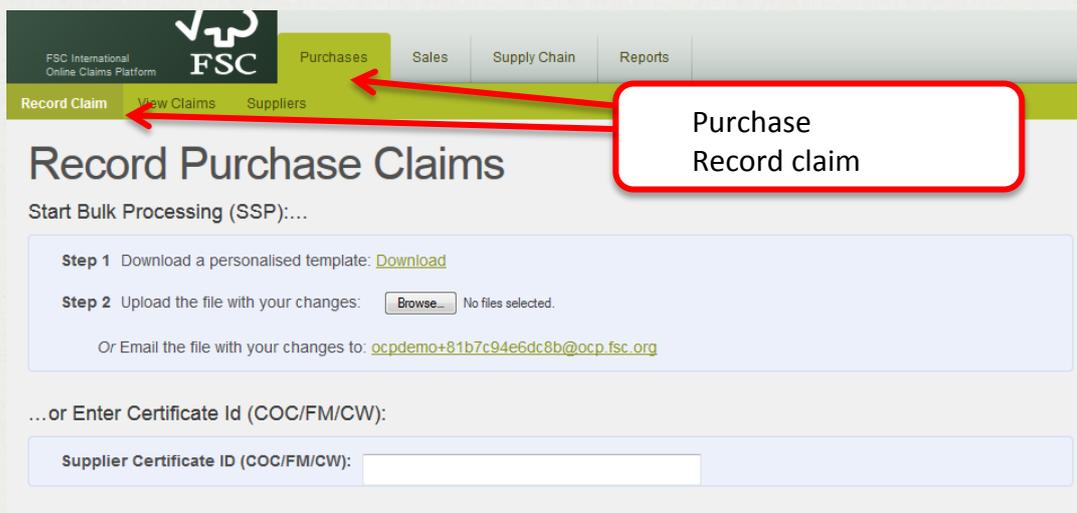
### Accessing the UI

- Login to the OCP <http://ocp-demo.fsc.org>



The screenshot shows the login interface for the FSC Online Claims Platform. At the top left is the FSC logo and the text 'FSC International Online Claims Platform'. The main heading is 'FSC Online Claims Platform'. Below this, there is a section for 'Existing User Sign in:' with fields for 'Email:' (placeholder: email address) and 'Password:' (placeholder: password). A link for 'Forgot your password?' is provided. A 'Log in' button is located below the password field. At the bottom, there is a section for 'Not yet registered?' with a link 'Click here to register.'

- If you are recording FSC purchase claims: navigate to “Purchase” Tab and then to the “Record Claim”.

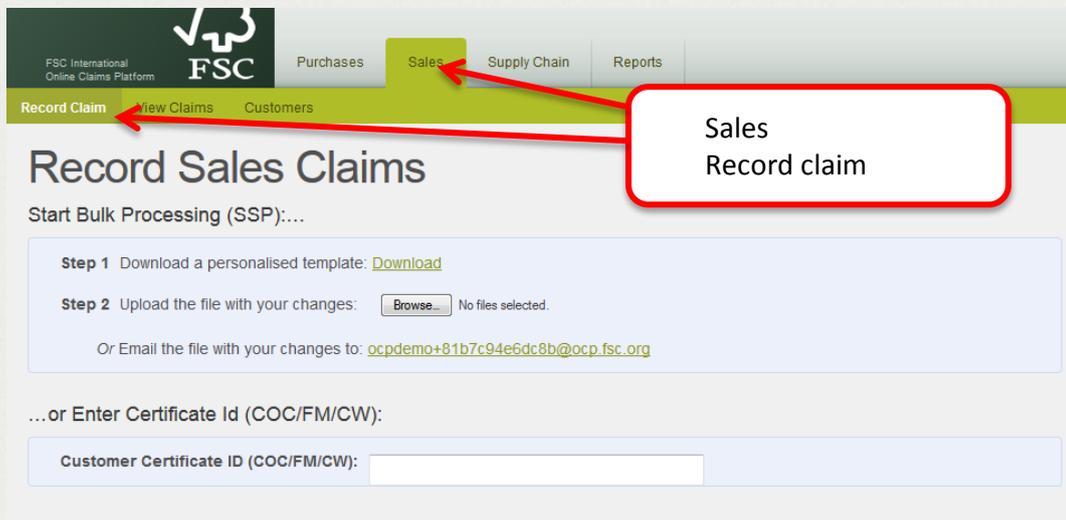


The screenshot shows the 'Record Purchase Claims' page. The top navigation bar includes 'Purchases', 'Sales', 'Supply Chain', and 'Reports'. Below this, there are sub-tabs: 'Record Claim', 'View Claims', and 'Suppliers'. A red box highlights the 'Record Claim' tab, with a red arrow pointing to it from a text box that says 'Purchase Record claim'. The main heading is 'Record Purchase Claims'. Below this, there is a section for 'Start Bulk Processing (SSP):...' with two steps: 'Step 1 Download a personalised template: Download' and 'Step 2 Upload the file with your changes: Browse... No files selected.' Below this, there is a link for 'Or Email the file with your changes to: ocpdemo+81b7c94e6dc8b@ocp.fsc.org'. At the bottom, there is a section for '...or Enter Certificate Id (COC/FM/CW):' with a text input field labeled 'Supplier Certificate ID (COC/FM/CW):'.

OR

If your customer has given you permission to record your Sales claims: navigate to the “Sales” tab and then to the “Record Claim” sub tab.

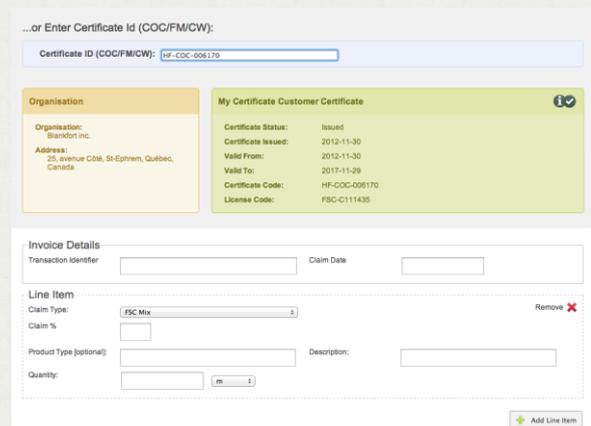
① If you see a message that you are not able to enter sales claims you will need to request permission from your customer<sup>2</sup>.



- Select the supplier from the drop down menu. If you have many suppliers you can begin typing in their certificate ID to reduce the list.



- The “record claim” form is then revealed. It should be completed using the information from your transaction documents.



<sup>2</sup> Click [here](#) to learn how to allow suppliers to enter claims.



Did you know that your workload can be reduced?

If you buy the same product from the same supplier multiple times you can **Consolidate** or Lump all of those claims into one monthly entry.

### Filling out the form and submit claim

- Complete all the mandatory and conditional fields<sup>3</sup> (see Appendix 1)

The screenshot shows a web form for submitting an FSC claim. It is divided into two main sections: 'Invoice Details' and 'Line Item'.

**Invoice Details:**

- Transaction Identifier: INV001
- Claim Date (YYYY-MM-DD): 2013-12-13 (with a green checkmark icon)

**Line Item:**

- Claim Type: FSC 100% (dropdown menu)
- Species: Picea abies, Pinus strobus, Quercus mongolica (tags with 'x' icons)
- Countries of Harvest: China (tag with 'x' icon)
- Product Type [optional]: W1 Rough wood
- Description: Some rough wood
- Quantity: 300 (input field), m3 (dropdown menu)

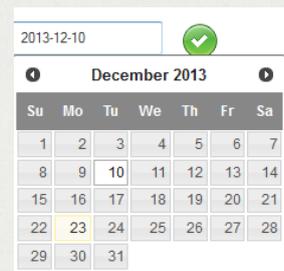
Buttons: 'Remove' (with 'x' icon), 'Add Line Item' (with '+' icon), and 'Submit Claim' (with document icon).

Type the invoice number into the “**Transaction Identifier**” box and choose the “**Invoice date**”.

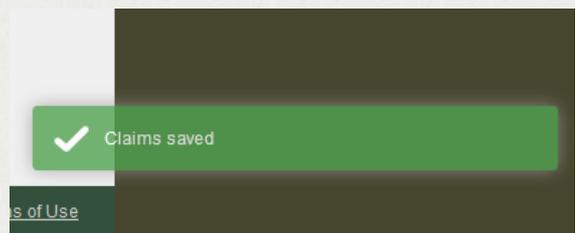
Enter the claims made by your supplier. First, choose the “**Claim Type**”.

Enter the “**Product Type**”<sup>4</sup> (optional) and a short “**Description**”. Lastly, enter the “**Quantity**” and choose the “**Unit**” of measurement

- Species and Countries of Harvest are mandatory when you buy from an FM/COC or CW/FM certificate or from a supplier with a Controlled Wood Risk Assessment who has sold you a product that contains wood from their risk assessment.



- To add another line item, click “**Add Line Item**”. To remove a line item, click “**Remove**”. When you have added all of the details from your invoice click “**Submit Claim**”. A green window will pop up at the bottom showing the claim is saved.



<sup>3</sup> FSC-STD-40-004\_V2-1 Chain of Custody standard: 1.4 Records

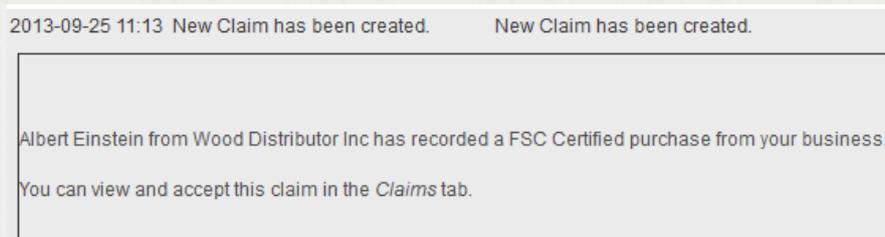
<sup>4</sup> 'Product type' is optional field which will help with your volume summary.

## Managing claims

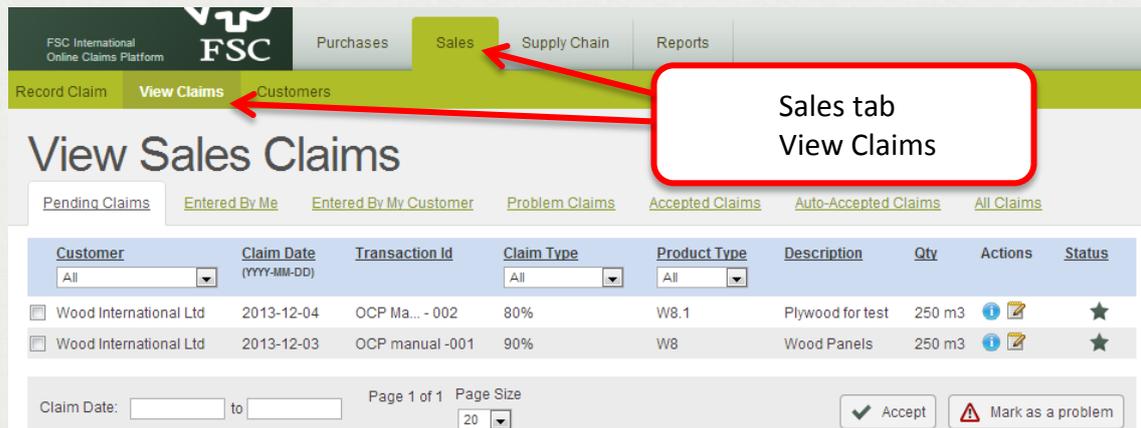
- You will be notified in the OCP once your trading partner has recorded an FSC claim for you to approve.



- Click on **“Notifications”** to read the message:



- If it is a claim from your customer, go to **“Sales”** tab, click on **“View Claims”** and you will be navigated to **“Pending Claims”**. If it is a claim recorded by your supplier on behalf of you, and then goes to **“Purchase”** tab.



Customer	Claim Date (YYYY-MM-DD)	Transaction Id	Claim Type	Product Type	Description	Qty	Actions	Status
<input type="checkbox"/> Wood International Ltd	2013-12-04	OCP Ma... - 002	80%	W8.1	Plywood for test	250 m3		★
<input type="checkbox"/> Wood International Ltd	2013-12-03	OCP manual -001	90%	W8	Wood Panels	250 m3		★

- If the claim entered is correctly and matches your records, click **“Accept”**.
  - ① A claim will be auto-accepted after 14 days if the claim is not validated or rejected by the suppliers. Once accepted, the claims can still be deleted from the platform, but with a record of that deletion.

- If however, you notice a discrepancy in the claim you will be able to **“Mark it as a problem claim”**.

- If your supplier (or customer) marks a claim which you have entered as a problem claim, you will receive a notification.

- Navigate to **“Purchase”** (or Sales) tab and then to **“Problem Claims”** to view the reason given for the problem and any comments provided by your trading partner. You can **“Delete”** or **“Edit”** the claim and resubmit it. The auto-acceptance period will then re-start.

### Mark Problem Claims

Reason for problem

Comments

Supplier	Claim Date (YYYY-MM-DD)	Transaction Id	Reason for problem	Comment	Actions
<input type="text" value="All"/>					
Wooden Genetics Ltd	2013-12-04	OCP Ma...st 004	Invalid Claim Type	Claim type is wrong	
Wooden Genetics Ltd	2013-12-03	OCP manual -001	Invalid Claim Type	Claim type is wrong	Edit Claim

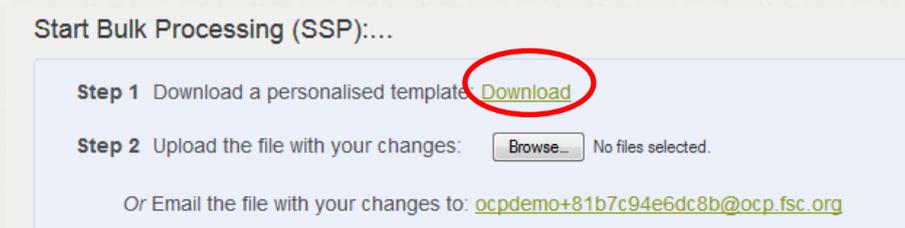
Claim Date:  to  Page 1 of 1 Page Size

Delete

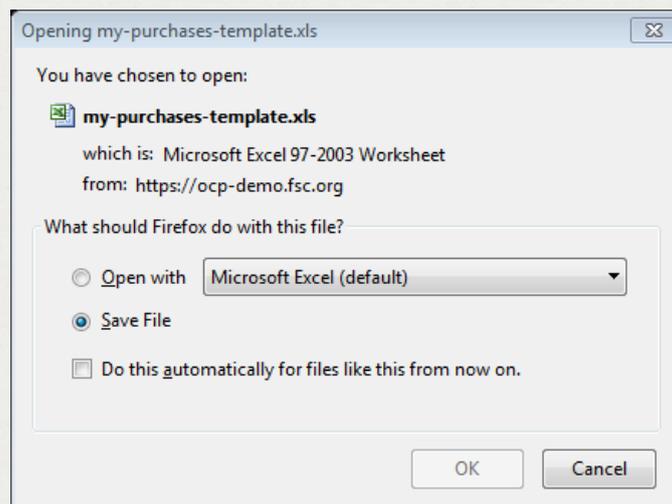
## Using Spreadsheet Processor (SSP)

### Step 1 – Downloading your spreadsheet

- In the “Record Claim” tab click the “Download” button next to Step 1 of the “Start Bulk Processing” section



- You can save a blank copy of the spreadsheet to your computer for quick access and reuse in the future.



**Step 2 – Filling out the spreadsheet**

- Complete all the mandatory and conditional fields<sup>5</sup> (see Appendix 1)

**Invoice details:**

Mandatory: Supplier Certificate ID, Transaction Identifier and Claim Date (YYYY-MM-DD)

PURCHASES		My Purchases					Wooden Genetics Ltd			
For office use only							HF-COC-003868			
Invoice Details					Line Items					
Supplier Certificate ID (COC/FM/CW)	Transaction Identifier	Claim Date (YYYY-MM-DD)	Claim Type	Claim %	Species	Countries Of Harvest	Product Type (Optional)	Description	Quantity	Units
HF-COC-000031	001234	2013-11-15								

Invoice Details		
Supplier Certificate ID (COC/FM/CW)	Transaction Identifier	Claim Date (YYYY-MM-DD)
HF-FM/COC-000031	001234	2013-11-15

**Line Items:**

Mandatory: Claims Type, Description, Quantity, Units

Optional: Product Type

- ① Species and Countries of Harvest are mandatory when you buy from an FM/COC or CW/FM certificate or from a supplier with a Controlled Wood Risk Assessment who has sold you a product that contains wood from their risk assessment.

My Purchases		Wooden Genetics Ltd							
		HF-COC-003868							
		United Kingdom							
Line Items									
Claim Date (YYYY-MM-DD)	Claim Type	Claim %	Species	Countries Of Harvest	Product Type (Optional)	Description	Quantity	Units	
2013-11-15	FSC 100%		Betula pendula	China	W1.1 Roundwood(logs)	Birch Logs	250	m3	
2013-11-16	FSC Mix	70	Betula pendula	Russia	W3.1 Wood chips	Birch chips	130	tonnes	
2013-11-17	FSC Recycled	65			W8 Wood panels	Recycled panels	100	m	
2013-11-18	FSC Mix Credit		Picea abies	Sweden	W12.3 Tables	Round tables	50	items	
2013-11-19	FSC Recycled Credit		Picea abies	Norway	W8.1 Plywood	Recycled plywo	789	m3	
2013-11-20	FSC Control wood		Populus spp.	China	W1.1 Roundwood(logs)	Poplar logs	1000	m3	

Claim Type	Claim %
FSC 100%	
FSC Mix	70
FSC Recycled	65
FSC Mix Credit	
FSC Recycled Credit	
FSC Control wood	

Species	Countries Of Harvest
Betula pendula	China
Betula pendula	Russia
Picea abies	Sweden
Picea abies	Norway
Populus spp.	China

Product Type (Optional)	Description
W1.1 Roundwood(logs)	Birch Logs
W3.1 Wood chips	Birch chips
W8 Wood panels	Recycled panels
W12.3 Tables	Round tables
W8.1 Plywood	Recycled plywo
W1.1 Roundwood(logs)	Poplar logs

<sup>5</sup> 'Product type' is optional field which will help with your volume summary.

### Step 3 – Submitting the spreadsheet

- Navigate to the same “**Record Claim**” tab you accessed before (either under ‘Purchase’ or ‘Sales’)
- Click the “**Browse**” button next to Step 2 of the “**Start Bulk Upload**” section and select your spreadsheet from the popup box.

Download. Step 2: Upload the file with your changes:  No files selected. Or Email the file with your changes to: [ocpdemo+81b7c94e6dc8b@ocp.fsc.org](mailto:ocpdemo+81b7c94e6dc8b@ocp.fsc.org)" data-bbox="191 257 821 391"/>

**Start Bulk Processing (SSP):...**

**Step 1** Download a personalised template: [Download](#)

**Step 2** Upload the file with your changes:  No files selected.

Or Email the file with your changes to: [ocpdemo+81b7c94e6dc8b@ocp.fsc.org](mailto:ocpdemo+81b7c94e6dc8b@ocp.fsc.org)

- A green window will pop up showing you that your spreadsheet has been uploaded.

### Submitting SSP via Email

- Alternatively you can submit the spreadsheet via email. Attach your spreadsheet to an email and send it to the email address listed in Step 2 of the ‘Start Bulk Upload’ section<sup>6</sup>.

Download. Step 2: Upload the file with your changes:  No files selected. Or Email the file with your changes to: [ocpdemo+81b7c94e6dc8b@ocp.fsc.org](mailto:ocpdemo+81b7c94e6dc8b@ocp.fsc.org)" data-bbox="436 493 940 590"/>

**Start Bulk Processing (SSP):...**

**Step 1** Download a personalised template: [Download](#)

**Step 2** Upload the file with your changes:  No files selected.

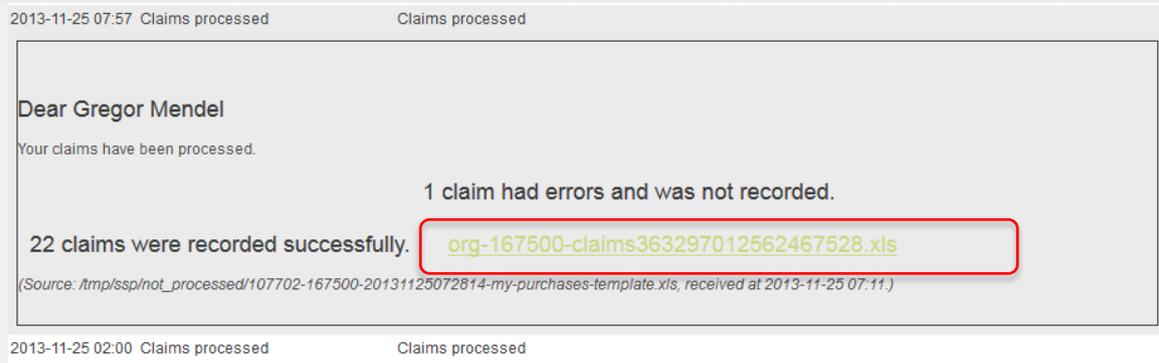
Or Email the file with your changes to: [ocpdemo+81b7c94e6dc8b@ocp.fsc.org](mailto:ocpdemo+81b7c94e6dc8b@ocp.fsc.org)

- Once your claims have been processed you will receive a notification via email informing you that the claims have been entered successfully and, if there were any errors, information on the problem claims.

<sup>6</sup> An example of the SSP inbox email: XXXX@ocp.fsc.org

### Step 4 – Correcting Mistakes

- If any incorrect claims have been uploaded, a notification will be returned to you with a link to download another spreadsheet containing only the incorrect lines from your original upload.

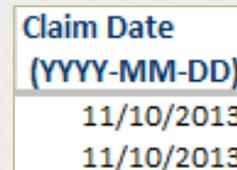


- The fields containing the mistakes will be highlighted in orange.

Invoice Details				Line Items						
Supplier Certificate ID (COC/FM/CW)	Transaction Identifier	Claim Date (YYYY-MM-DD)	Claim Type	Claim %	Species	Countries Of Harvest	Product Type (Optional)	Description	Quantity	Units
CU-COC-816016	1234	2014-05-05	FSC MIX	70	Picea abies, Abies spp	United Kingdom, Russia	W5.4	Floor planks	26.46	m3
TT-COC-001093	05621	2014-05-05	FSC 100%		Pinus Sylvestri	Norway	W5.4	Floor planks	49.39	m3
ZZ-COC-008976	346755	2014-05-04	FSC 100%		Picea abies	Russia	W5.4	Floor planks	100.6	m3
JJ-COC-086869	HH997584	2014-05-10	FSC 100%		Prunus avium	United Kingdom	W4.3	Fence Posts	34.8	m3

invalid certificate ID  
not certified for product type  
invalid claim type  
certificate expired

- In this returned sheet, cell format of “Claim Date” was changed to ‘General’ by Excel during the data process. You need to change the format back to ‘Date’ in order to view the correct dates.



- Correct the highlighted errors and resubmit following the instructions from Step 3.

## Reporting

### Volume Summary

The OCP can be used to generate a Product Type Volume Summary. The summary will be automatically produced from all the Claims you record and the output summary will be automatically produced from all the Claims your customer’s record (or you enter on their behalf)<sup>7</sup>.

A	B	C	D	E	F	G
Supplier	Product Type	Product Description	Quantity	Units	Conversion factor to m3	
					m3	m3
CU-COC-805617	W11.8	14.5 X 144 TORUS Medium-Density Fibreboard	440	mtr	0.002088	0.91872
CU-COC-805617	W11.8	18 X 219 OGEE Medium-Density Fibreboard	64	mtr	0.003942	0.252288
CU-COC-805617	W11.8	18 X 50 Picture Rail Medium-Density Fibreboard	293	mtr	0.001242	0.363906
CU-COC-816016	W11.8	18 X 119 TORUS Medium-Density Fibreboard	157	mtr	0.002142	0.336294
TT-COC-001663	W11.8	18 X 144 OGEE Medium-Density Fibreboard	544	mtr	0.002592	1.410048
TT-COC-001663	W11.8	14.5 X 94 Lambs Tongue Medium-Density Fibreboard	64	mtr	0.001363	0.087232
TT-COC-001670	W11.8	25 X 175 Weatherboard Medium-Density Fibreboard	50	mtr	0.004375	0.21875
TT-COC-001811	W11.8	14.5 X 69 Lambs Tongue	768	mtr	0.0010005	0.768384
TT-COC-001811	W11.8	18 X 69 OGEE Medium-Density Fibreboard	576	mtr	0.001242	0.715392
TT-COC-001811	W11.8	18 X 69 OVOLO Medium-Density Fibreboard	945	mtr	0.001242	1.17369
TT-COC-002005	W11.8	14.5 X 119 Lambs Tongue Medium-Density Fibreboard	976	mtr	0.0017255	1.684088

 The table above is an example of the data that the OCP can produce to assist with Volume Summaries. The sheets in the Excel report will provide a full list of verified suppliers, and summaries of inputs and outputs by product type and supplier. Conversion factors may be entered for product types, if applicable.

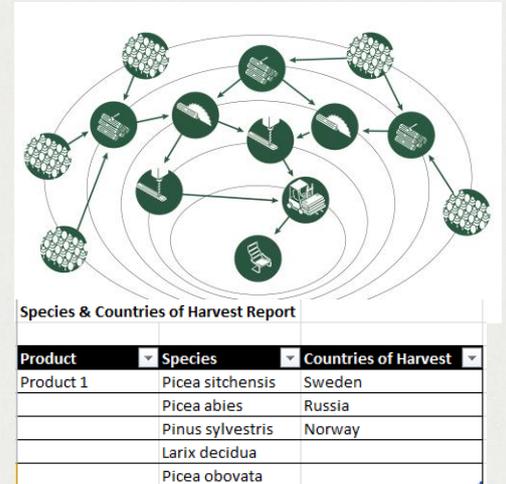
To download a sample Volume Summary report, click **“Reports”**, then **“Volume Summary”**, then **“Get Volume Summary”**. Click **“OK”** to download the Excel sheet and save it to your computer.

<sup>7</sup> FSC-STD-40-004\_V2-1 Chain of Custody standard: 5.2 Material Balance and 6.1.1 Identification of output sold with FSC claims

## Origin Report

Species and Countries of Harvest need to be recorded in the OCP at the point when you buy newly introduced wood into the FSC supply chain, meaning from an FM/COC or CW/FM certificate or from a supplier with a Controlled Wood Risk Assessment who has sold you a product that contains wood from their risk assessment. All products with FSC claims are recorded in the OCP so it is possible to provide information concerning 'all possible countries of harvest' and 'all possible species' which could be included in a product.

- ❶ This happens without you or your customer being able to see the full supply chain.
- ❷ Such reports will assist with trade regulation compliance.



To download a case study of Origin Report, click **“Reports”**, then **“Origin Report”**, then **“Get Origin Report”** to download.

- ❶ This case study shows what is expected to be revealed by the origin report.
- ❷ Click **“Go back”** to navigate back the OCP account.

Supplier	Certified Species	Countries of Harvest	Claim(s)	Supplier Type	Customer	Suppliers	Product	Species	Countries
Organisation A	Species A Species B Species C Species D Species E	Country A	FSC 100%	FMU	Organisation E	Organisation A Organisation B Organisation C Organisation D	Product A	Species A Species B Species C	Country A Country B Country C
Organisation B	Species A Species D Species E Species F Species G	Country B	FSC 100%	FMU				Species D Species E Species F Species G Species H	
Organisation C	Species A Species C Species E Species G Species H	Country C	FSC 100%	FMU	Organisation F	Organisation B Organisation C	Product B	Species A Species C Species D Species E Species F Species G Species H	Country B Country C
Organisation D	Species A Species B Species C Species D	Country A	FSC 100% / FSC Controlled Wood	FM/CW					

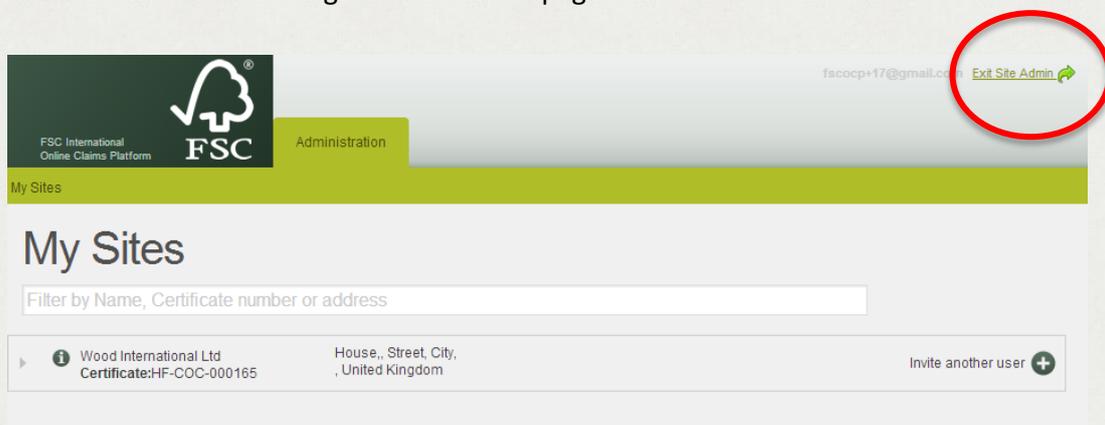
## Administration

### Site Admin

- If you are logged in as the administrator for your organization or site, click the **Admin** button from the admin screen you will be able to:

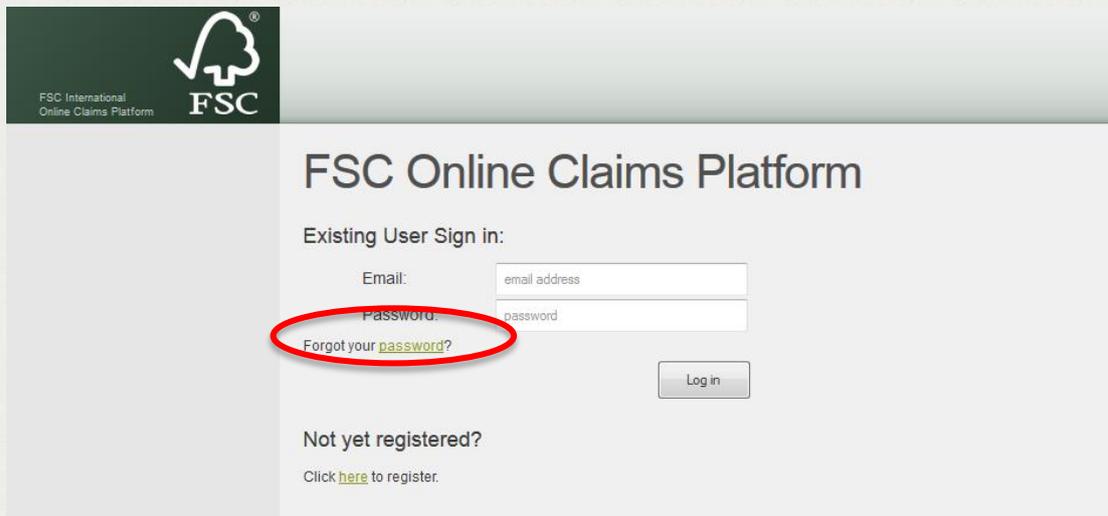


- View sites associated with the Account
  - View Users associated with Account across all sites by site
  - Add a new OCP Admin User to any site associated with the CH account
  - Add a new OCP User to any site associated with the Certificate Holder account
  - Change status of OCP Admin Users to OCP Users at any site belonging to Account
  - Change status of OCP Users to OCP Admin User at any site belonging to Account
  - De-activate OCP Users
- Click on **Exit Site Admin** to navigate to the claim page.



## Managing Password

- Click the forgotten password link on the login page and you will receive an email to the email account that is registered for the OCP.



FSC International  
Online Claims Platform

### FSC Online Claims Platform

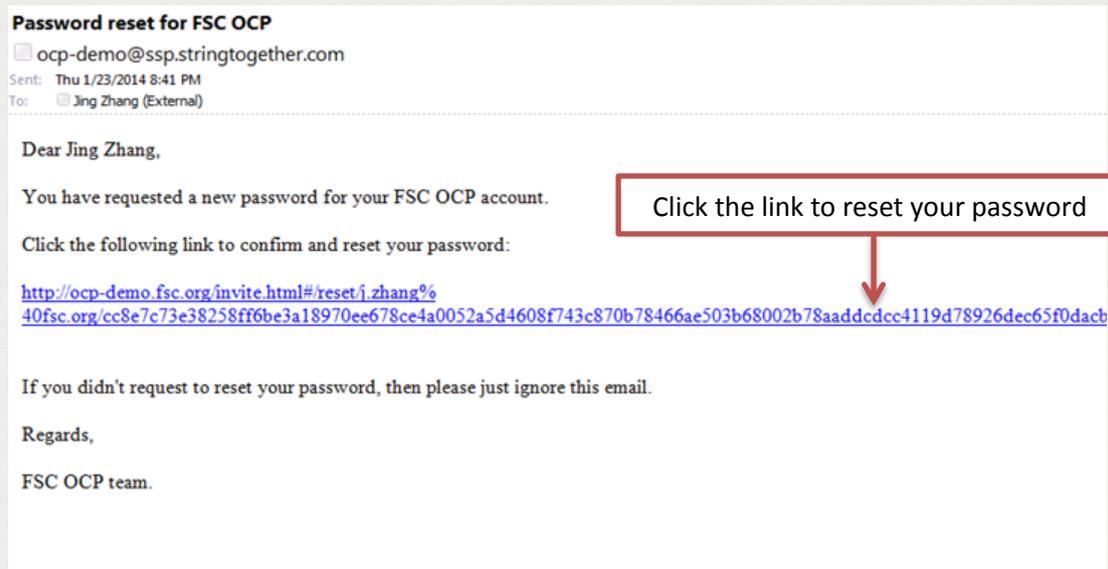
Existing User Sign in:

Email:

Password:

[Forgot your password?](#)

Not yet registered?  
Click [here](#) to register.

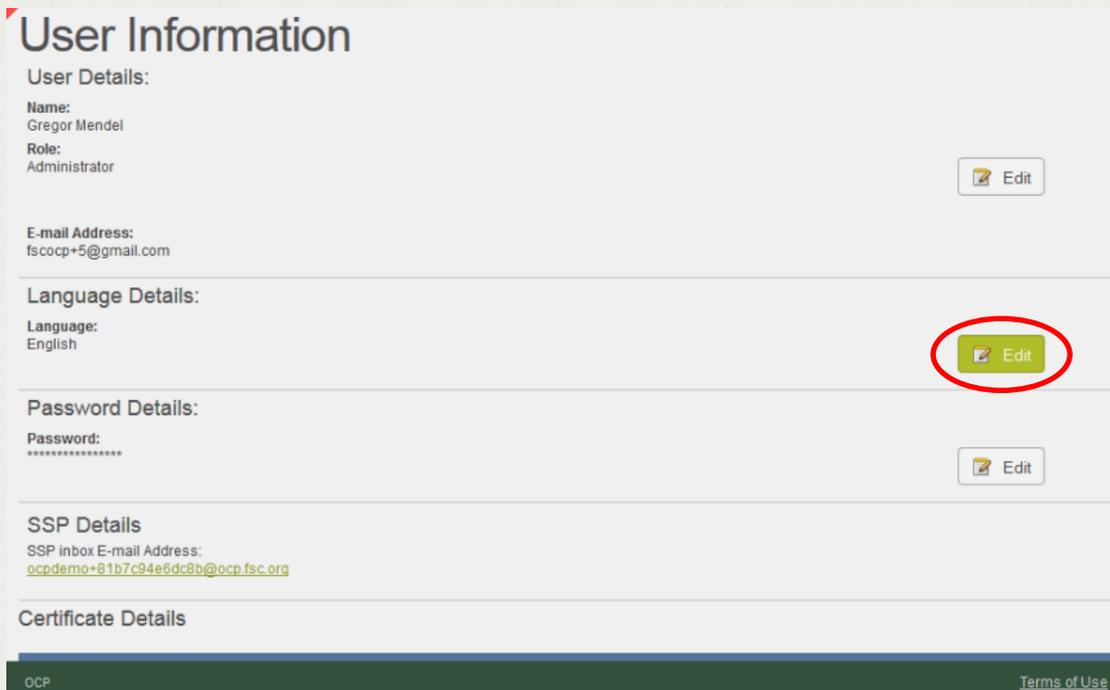


## Change Your OCP Language

- Navigate to **“Your Account”**:



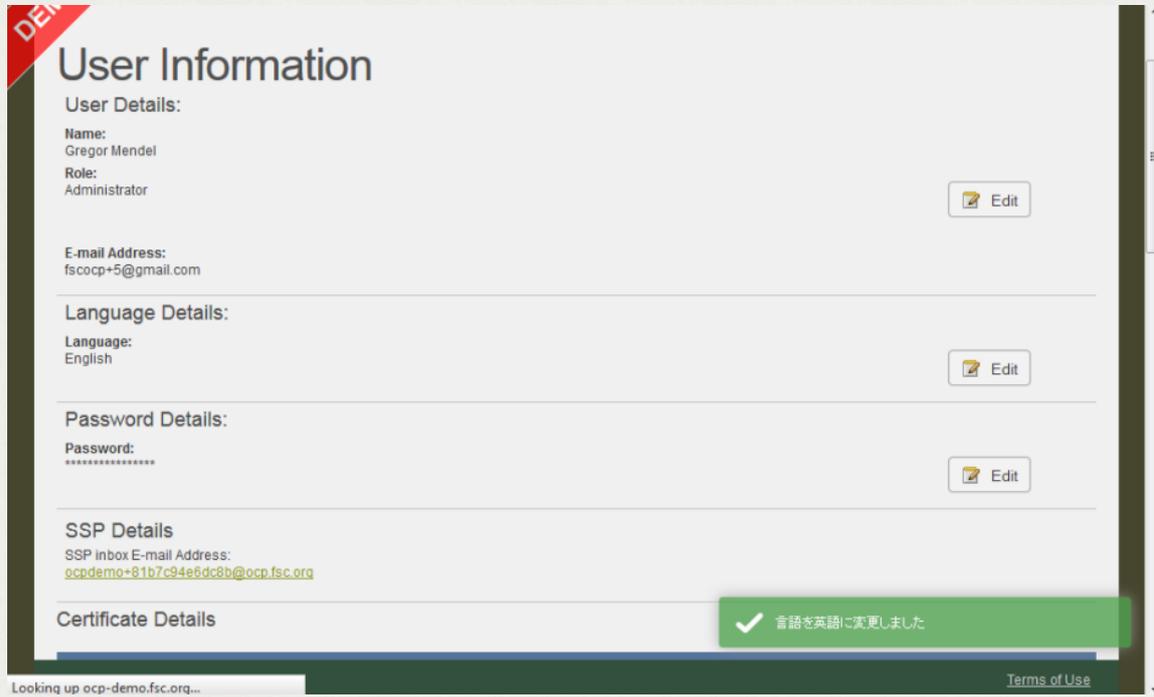
- Choose **“Edit”** from **“Language Details”**:



- Select the language of choice:

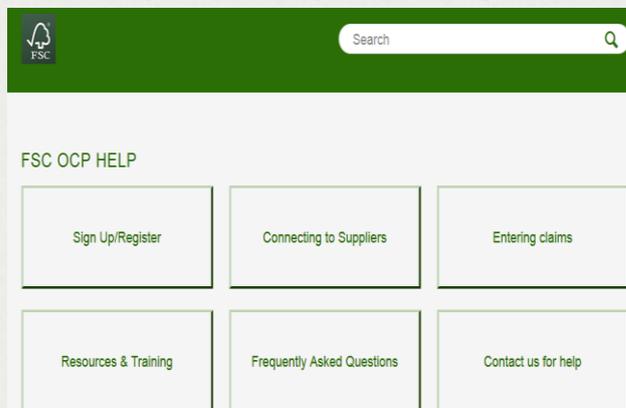


- If language does not change on your current page, refresh your screen or open the page in a new tab.




## Getting Support

### Where can I get support?



Support for the OCP is available via the [OCP Help website: ocp-help.fsc.org](https://ocp-help.fsc.org).

From there you have access to a library of support documents, videos, quick reference guides and FAQs.

If you cannot find the answer to your question within this knowledge base, you can also contact the support team who will guide you through the problem via a ticket.

### What is a ticket?

When you submit a help request to the support team, it is known as a ticket. Your ticket will be assigned to the person who is best equipped to deal with your question. The support person will respond to your ticket via email.

### How do I submit a ticket?

To submit a ticket to the support team you can:

- 📧 Use the [OCP help](https://ocp-help.fsc.org) or
- 📧 Send an email to [support@ocphelp.zendesk.com](mailto:support@ocphelp.zendesk.com). Or
- 📧 Click on the **Help** tab in the OCP and describe your question.



- ① English is the preferred language for support but other languages are supported but could lead to less rapid response time to the question.



## Guidelines for submitting a ticket

1. Include your organization name and certificate code.
2. Ensure that you can reproduce the problem
3. Give a brief description
  - Be specific about the problem.
  - include what you were trying to do, what went wrong and when the issue occurred
  - e.g. 'At 10:00GMT 03/08/2013, when I was recording a claim from my supplier XYZ, I was unable to select FSC 100% from the Claim Type list.'
4. Give instructions on how to reproduce the issue
  - Provide detailed step by step instruction so that the support team can reproduce the problem.
  - If you receive any error messages, include the text in the messages.
  - If possible include screen shots.
  - If possible include all the data you entered into all fields.
  - If possible, list your operating system, web browser and the software you were using.

**By providing us with this information, you will speed up the support process for your ticket and the speed in which the problem is resolved.**

## Appendix 1: Supplier Certificate Detail

Certificate Code	BETA-COC-000001
License Code	HF-BETA001
Controlled Wood Code	BETA-CW-000001
Certificate Status	Valid
First issue date	2006-08-28
Last issue date	2011-08-30
Expiry date	2016-08-29
Company Name	Beta Test Supplier
Address	Cabañas Murmullo de Piedra, Mérida, Via Jají., 5107 Bocono, Venezuela
Contacts	<a href="mailto:neethu.jacob@historicfutures.com">neethu.jacob@historicfutures.com</a> , <a href="mailto:jing.zhang@fsc.org">jing.zhang@fsc.org</a>

### Products

Product Type	Species	Main Output Category
W3 Wood in chips or particles W3.1 Wood chips	Pinus caribaea, Pinus strobus, Betula pendula, Juglans mandshurica	FSC Controlled Wood, FSC Mix, FSC 100%
W1 Rough wood W1.1 Roundwood (logs)	Pinus caribaea, Pinus strobus, Betula pendula, Juglans mandshurica	FSC Controlled Wood, FSC Mix, FSC 100%
W5 Solid wood (sawn, chipped, peeled) W5.2 Solid wood boards	Pinus caribaea, Pinus strobus, Betula pendula, Juglans mandshurica	FSC Controlled Wood, FSC Mix, FSC 100%
W3 Wood in chips or particles W3.2 Sawdust	Pinus caribaea, Pinus strobus, Betula pendula, Juglans mandshurica	FSC Controlled Wood, FSC Mix, FSC 100%



## Appendix 2: Data Fields

Field	Requirement	Data	Valid inputs	Guidance
<b>Certificate ID</b>	<b>Mandatory</b>	The code of the certificate holder for whom you are recording the claim.	The valid COC/FM certificate code of any of your supplier (or customer for sales claim).	Should be provided on all sales documents
<b>Transaction Identifier</b>	<b>Mandatory</b>	Any code or number, which can be used to uniquely identify the sales document.	This field is free text so accepts any input.	i.e. Invoice #, Delivery note #
<b>Claim Date</b>	<b>Mandatory</b>	The date on the sales document corresponding to the claim	UI: dropdown selection SSP: YYYY-MM-DD	
<b>Claim Type</b>	<b>Mandatory</b>	The FSC Claim that is made on the sales document.	FSC 100%, FSC Mix, FSC Mix Credit, FSC Recycled, FSC Recycled Credit, FSC Controlled Wood.	UI: selected from a drop down menu SSP: requires a valid claim type to be entered
<b>Claim %</b>	<b>Conditional:</b> Required when claim type is a percentage	Used to capture the % value of the claim being made, when the claim type is a percentage claim. e.g. FSC Mix 70%	Numeric value between 1 and 99 (100 is acceptable for FSC Recycled but not FSC Mix)	Only enter the numeric value. Do not include a % symbol.
<b>Species</b>	<b>Conditional:</b> Required when you buy from an FM/COC or CW/FM certificate or from a supplier	Latin name of the species listed in the claim.	The Latin name of any tree species picked from the Pick Lists or search provided.	UI: dropdown selection



Field	Requirement	Data	Valid inputs	Guidance
	with a Controlled Wood Risk Assessment who has sold you a product that contains wood from their risk assessment			SSP: must correctly enter a species name as per the pick list or suppliers certificate information.
<b>Country of Harvest</b>	<b>Conditional:</b> Required when you buy from an FM/COC or CW/FM certificate or from a supplier with a Controlled Wood Risk Assessment who has sold you a product that contains wood from their risk assessment	Country from which the fibre in the claim originated.	Country name must be chosen from the ISO country list.	UI: dropdown selection SSP: Must correctly enter a valid country name Resource: <a href="#">ISO country list</a>
<b>Product Type</b>	<b>Optional</b>	The type of product being claimed, as classified by FSC	A valid Product Type from the FSC Product Type classification i.e. W1.1Roundwood (logs)	UI: dropdown selection SSP: must correctly enter the full product type code and name Resource: <a href="#">FSC-STD-40004a</a>
<b>Description</b>	<b>Mandatory</b>	A description of the product.	This field is free text so accepts any input.	Could use the description given on the transaction documents



Field	Requirement	Data	Valid inputs	Guidance
<b>Quantity</b>	<b>Mandatory</b>	The total quantity of each line item	Numerical value 0 < 9,999,999.9999999	Enter the numerical value only
<b>Units</b>	<b>Mandatory</b>	The unit by which the product is measured.	m, m <sup>2</sup> , m <sup>3</sup> , mbf, l, items, lb, kg, tonnes	If none of the valid inputs match your units, use items and include the actual units in the description.