e-LMS User Guide

Electronic Lodgement of Mailing Statements

e-LMS Version: 2.1

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1 Welcome to e-LMS

1.1 Welcome to e-LMS Help

Electronic Lodgement of Mailing Statements

e-LMS is the system you use to create and submit a Mailing Statement, track its progress, retrieve pricing details and enquire about your existing statements. To use e-LMS, you must have a valid Australia Post e-LMS account, and be able to access the internet.

What you need to know about e-LMS

- An overview of e-LMS
- Getting started with e-LMS
- What's new in e-LMS?

For information about performing tasks, choose a topic from the contents pane. Some useful shortcuts to procedures performed by different user roles can be found in the Business Procedures section.

1.2 Overview

1.2.1 Overview of e-LMS

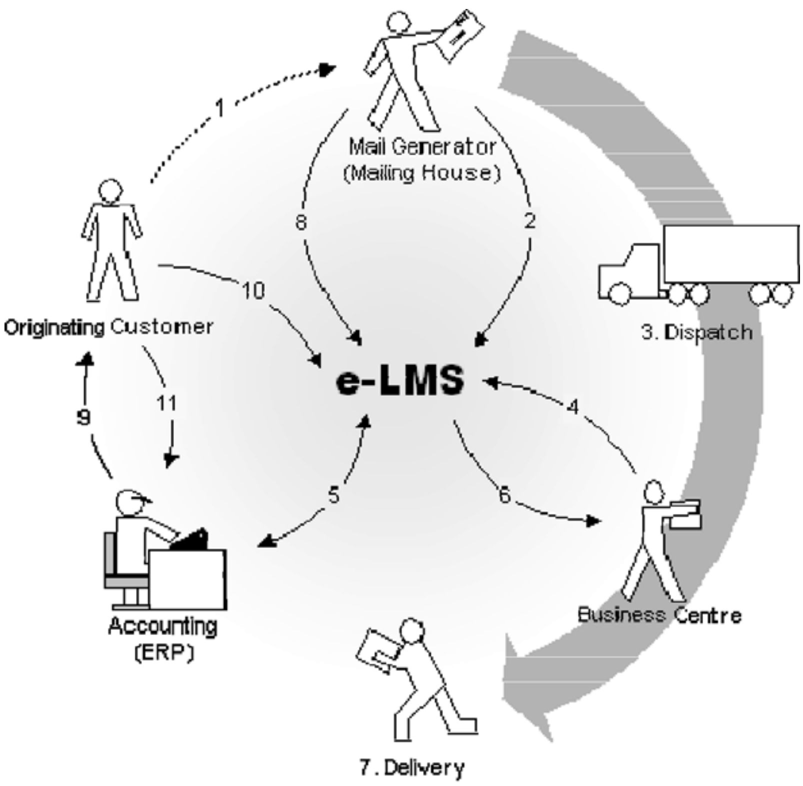
e-LMS (electronic Lodgement of Mailing Statements) is an electronic gateway to Australia Post, allowing Mail Houses to lodge Mail Statement information via a web-based application. By using either direct entry or file transfer from the Mail House production control systems, e-LMS improves the efficiency of mail lodgement and account reconciliation. e-LMS is also used by Post staff to expedite checking, costing, approving and invoicing of bulk mail services.

The following topics look at e-LMS from three different viewpoints: the Workflow, the Mailing Statement and the User:

- e-LMS Workflow
- The Lifecycle of a Mailing Statement
- Roles of Users
- What's new in version 2?
- Security

1.2.2 Workflow

e-LMS is the electronic hub for the tasks involved in lodgement of bulk mail. The physical and business processes involved in a typical e-LMS workflow are shown in the diagram below:



Typical e-LMS Workflow

1. Originating Customer raises an order with the Mail Generator
2. **Mail Generator lodges a Mailing Statement**

   The Mailing House enters the details of the mailing job in e-LMS, by selecting

   - contact and account details of the Mail Generator and the Originating Customer
   - job details by which the Mailing House can identify and track the job
   - where the mail will be physically lodged
   - details of the mail articles contained in the job, including the applicable contracts

   e-LMS allows you to prepare draft Mailing Statements in advance of lodgement, which are saved and can be edited and submitted when required.
3. Mail is dispatched to an Australia Post Business Centre
4. **Mailing Statement is validated and processed**

   e-LMS has automated back-office functions that speed the process of validating each Mailing Statement. This validation includes checking the details entered in the Mailing Statement and verification of the customer's account status.
5. **Pricing Statement is issued**

   Once the Mailing Statement has been validated, a Pricing Statement is issued by the ERP system, upon which the customer will be invoiced.
6. **Physical mail is checked and approved**

   When the mail arrives at the Business Centre, the physical mail is checked against the corresponding Mailing Statement. If the mail matches the details on the Mailing Statement, the job is approved for delivery, otherwise the Mail Statement is marked as non-conforming, and may be rejected.

   The Mail Generator will be alerted about non-conforming mail whenever they log in to e-LMS, and can view the status of all rejected jobs.
7. Mail is dispatched for delivery
8. **Mail Generator checks status of Mailing Statements**

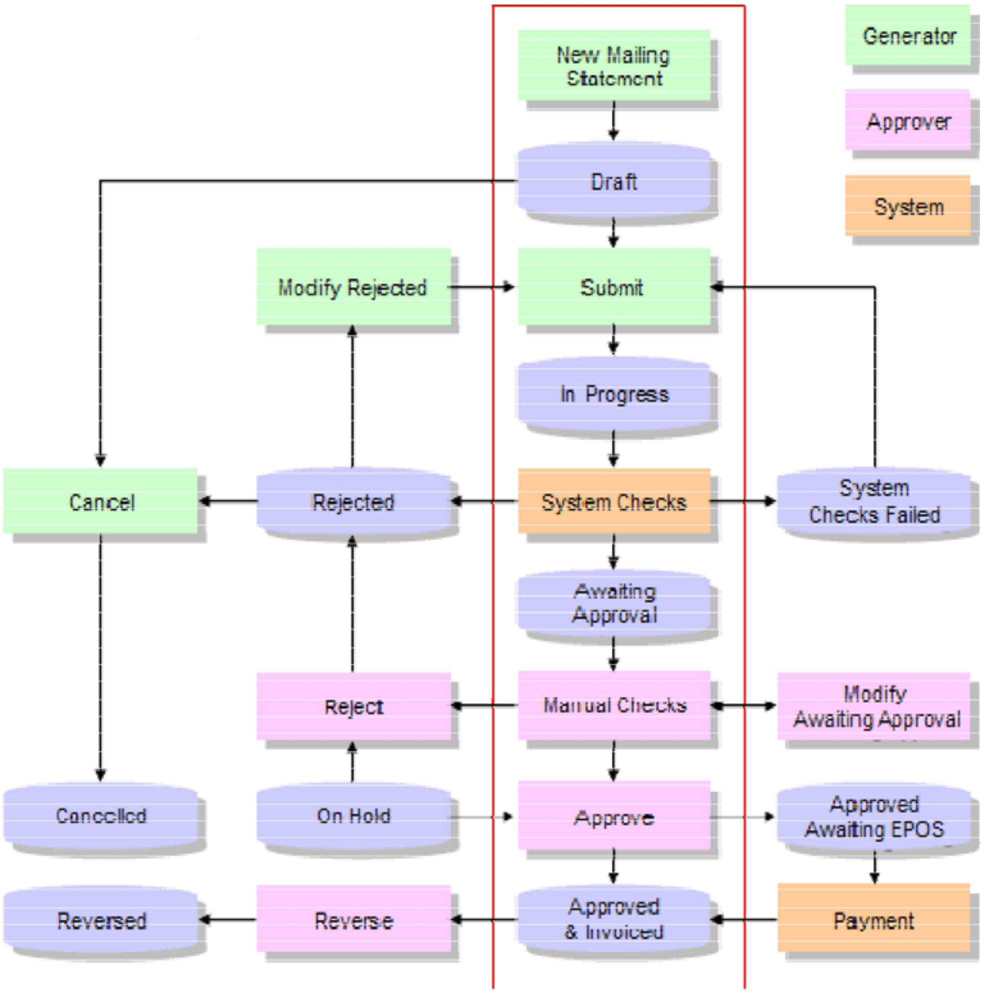
   At any stage during the lodgement process, the Mail Generator can view the status of all jobs, which may be in draft, pending approval, rejected awaiting re-submittal or approved for delivery.
9. Tax Invoice is issued
10. **Customer checks Tax Invoice**

    e-LMS permits the Originating Customer to quickly verify the details of a Tax Invoice against the corresponding Mailing Statements and Pricing Statements.
11. Customer submits payment

    The workflow tasks performed in e-LMS are highlighted; click the links to learn more about these tasks.

1.2.3 Lifecycle of a Mailing Statement

As a Mailing Statement progresses through the workflow, its status will change as it is processed, validated, checked, amended, suspended, reversed, cancelled or approved in e-LMS:



Status	Description
Draft	The Mailing Statement is being drafted, but is not yet complete and has not been submitted.
In Progress	The Mailing Statement has been submitted and is being processed. The physical mail has been dispatched to the Lodgement Point.
Awaiting Approval	The automatic system checks have now been completed and a Pricing Statement has been issued. The job is awaiting checks on the physical mail and manual approval.
Approved & Invoiced	The Mailing Statement and the physical mail have passed all checks. The job is approved for delivery and invoicing.
On Hold	Processing of the Mailing Statement has been put on hold, pending resolution of an enquiry.
Approved Awaiting EPOS Pricing	The Mailing Statement and the physical mail have passed all checks and a Pricing Statement has been issued. The job was submitted with the Cash Payment option selected and is awaiting confirmation of EPOS payment.

Status	Description
Rejected	The Mail Generator or Agent must either modify and resubmit the Mailing Statement, or cancel it.
Reversed	An approved Mailing Statement has been reversed.
Cancelled	The Mail Generator, Agent or the system has cancelled the Mailing Statement.

1.2.4 Who Uses e-LMS?

Within e-LMS there are a number of different roles played by users. The screens, functions and information made available to you will depend on your role and your authorisation level, which are set by your system or account administrator. User roles are divided into customers and internal users, each with different capabilities:

Role	Authorisation	Type	Code	Capabilities
Originator	Default	Customer	EXT_Orig_Cust_Default	An Originator role is used by Originating Customers to view, print and download Mailing Statements and Pricing Statements that have been submitted on their behalf by a Mail Generator.
Originator	Administrator	Customer	EXT_Orig_Cust_Admin	An Administrator can add and modify user profiles.
Generator	Generator	Customer	EXT_Cust_Generator	A Generator (Mail Generator or Mail House) can create, submit, cancel, view, print and download Mailing Statements specific to their own account.
Generator	Default	Customer	EXT_Gen_Cust_Default	A Default Generator role is restricted to only view, print and download Mailing Statements specific to their own account.
Generator	Administrator	Customer	EXT_Gen_Cust_Admin	An Administrator can add and modify external user profiles and maintain the list of Originator accounts used by the Mail Generator.
Outstation	Default	Internal	Outstation_Default	An Outstation user can view, print and download Mailing

Role	Authorisation	Type	Code	Capabilities
				Statements generated at their location.
Outstation	Agent	Internal	Outstation_Agent	An Outstation Agent has the additional authority to create, submit, cancel and modify Mailing Statements generated at their location.
Outstation	Approver	Internal	Outstation_Approver	An Outstation Approver has the authority to view, reject, approve, hold and modify (only when awaiting approval) Mailing Statements generated at their location. An Approver cannot create and submit new statements, nor modify rejected statements.
BC	Default	Internal	BC_Default	A BC (Business Centre) user can view, print and download Mailing Statements and Pricing Statements lodged at their mail centre.
BC	Agent	Internal	BC_Agent	A BC Agent has the additional authority to create, submit, cancel and modify Mailing Statements generated at their location. An Agent can also view reasons why Mailing Statements are rejected.
BC	Approver	Internal	BC_Approver	An BC Approver has the authority to view, reject, approve, hold, modify (only when awaiting approval) and reverse Mailing Statements generated at their location. An Approver cannot create and submit new statements, nor modify rejected statements.
Management	Default	Internal	MGT_Default	National and State management users can view all statements and reports, but cannot

Role	Authorisation	Type	Code	Capabilities
				create, submit, modify, approve or reject statements.
Controller, Administration, Support and Help Desk	Default	Internal	Admin_Default Controller_Default Support_Default Help_Desk	Internal administration and support users have different authorisation levels appropriate for their defined roles.

1.2.5 What's New in e-LMS?

Version 2.0 Release 4 contains numerous upgrades, improvements and new functionality.

Home Page

The Job Number Unique ID now displays on the external user's Home screen.

Browser

e-LMS v2.0 is now compatible with Mozilla® Firefox version 1.5 or later.

Customer Profile

A customer can be created without an owner account. Also, an existing customer can have their owner accounts removed. In both situations the customer is set to 'In-active'. Users belonging to an 'In-active' customer can not log into e-LMS.

Full Rate and Contracts

- When creating a Mailing Statement, if the line item is lodged on Full Rate pricing, then the text 'Full Rate' does not display on the statement. The contract number displays when the line item is lodged using a contract.
- If there is a contract to lodge for a product/account/lodgement point combination, the 'Contract' drop box is replaced with a 'Select Contract or Full Rate' drop box. If there are no contracts to lodge, the drop box is not displayed.

Mailing Statements

- Lodgement conditions and disclaimer text is only displayed to an external user during mailing statement creations. When an external or internal user accesses the mailing statement via a search, this text is not displayed on the mailing statement.
- During mailing statement creation line item quantities can now be modified rather than deleting the mailing statement and re-creating with the correct quantity.
- The Article Type drop box has been re-ordered into alphabetical order.
- When a cubing relevant product is used during mailing statement creation, a link to the Cubing Calculator is activated to enable the cubic weight to be calculated.

- At the time of creation and submission of a mailing statement that contains a line item with a unit price equal to or below a system parameter lower limit, or equal to or greater than a system parameter upper limit, the mailing statement has a status of 'Pricing Check Required'. These statements are investigated by the e-LMS Admin, Support or Controller staff who can:
  - correct the potentially invalid price is correct in SAP then submit the mailing statement to SAP for re-pricing. The mailing statement is moved to the status of 'Awaiting Approval'.
  - validate the submitted unit price then move the mailing statement to 'Awaiting Approval'.

Business Centre staff should contact the State Controller to initiate this process.

Batch approval of mailing statements in Awaiting Approval status is now available.

NEW Pricing Statement

The base price per kilo is now displayed on the pricing statement. Also, If the line item is subject to a pick-up fee, the fee is displayed at the line item level and there is a summary, by contract, of the pick-up fee.

NEW System Administration

Support staff are able to:

- test the communication between SAP and e-LMS
- view the number of mailing statements in a state awaiting a response from SAP
- monitor the mailing statement processing
- setup a system message to communicate to all e-LMS v2.0 users

1.2.6 How Safe is My Information?

Australia Post takes security seriously. We have implemented enterprise-class security systems at all Australia Post facilities, including physical and data security measures designed to protect our resources and your information.

1.3 Using e-LMS

1.3.1 Using e-LMS

To use e-LMS, you must have a valid account.

What do you want to learn about?

- The types of help information available and where to get it
- How to use online help

1.3.2 Getting Help

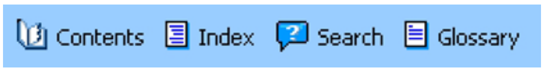
Depending on your needs, you can get help in several different ways; choose the method that best suits the way you work:

On-screen Help

- For information about the options on the current page, click help with this page to open and close the on-screen help message.

Online Help

- To display online help, click **user guide** at the top-right corner of any e-LMS page. The online user guide will be displayed in a separate browser window. Use the **help toolbar** to find the information you want. Tell me more about using online help.



Printable User Guide

- To download the printable PDF user guide, click here. You will need Adobe Reader installed on your computer to view and print the user guide.

National Help Desk

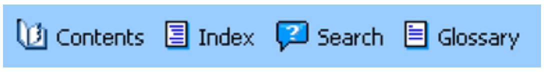
- You can telephone the Help Desk on 1800 287 457 during normal business hours.

Training

- e-LMS Training provides a selection of on-line training options. Contact your Australia Post representative for details.

1.3.3 Using Online Help

To display online help, click the help icon displayed at the top-right corner of any e-LMS page. Online help will be displayed in a separate browser window, so that you can work with both screens open at the same time. Help topics are organised into sections, which may also be divided into sub-sections. Use the **help toolbar** to find the information you need.



What do you want to do?

Locate a topic in help

1. From the help toolbar, click **Contents**. The topics available will be displayed in the contents frame on the left.
2. From the contents frame, click to expand a section.
3. Click to select a topic.

The topic will be displayed in the topic frame on the right.

Locate a topic from the index

1. From the help toolbar, click **Index**. The index of keywords will be displayed in the frame on the left.
2. Select a keyword from the list. If the keyword is found in more than one topic, select a topic from the popup list.

The topic will be displayed in the topic frame on the right.

Search topics for a keyword

1. From the help toolbar, click **Search**. The search tool will be displayed in the frame on the left.
2. In the search field, type a word or phrase, and click GO to list the topics that contain the keyword or phrase.
3. Select a topic from the list.

The topic will be displayed in the topic frame on the right.

Find definitions of terms

1. From the help toolbar, click **Glossary**.
2. In the **Term** list box, scroll down and select the term.

The definition of the selected term will be displayed in the **Definition** box below.

Print a topic

1. Click inside the topic frame on the right.
2. From the browser toolbar or menu, select the **Print Preview** command.
3. From the Print Preview window, choose the option to print from the selected frame.
4. Select **Print** and choose a printer.

The print options displayed will depend on the version of the browser you are using. For more information, refer to the help available from your browser.

1.3.4 Your e-LMS Account

To use e- LMS, you must have a valid account. Your account details are set up and maintained by the Australia Post system administrator. Your account type will reflect the role your organisation plays in the workflow:

- **Mail Generator**

As a Mail Generator, you will be able to create and manage Mailing Statements for your own jobs, and jobs you perform on the behalf of your customers.

- **Originating Customer**

As an Originating Customer, you will be able to view Mailing Statements that have been submitted on your behalf by a Mailing House (Mail Generator) . You will also be able to view Pricing Statements so that you can validate charges billed to your Australia Post charge accounts.

Users

Each account can have multiple users with independent logins. The list of users is maintained by your in-house e-LMS administrator.

Account Details

To open or change your e-LMS account:

- Contact your Australia Post representative.

To add and remove users

- You must have Administrator privileges to maintain users on your account.

To add and remove your own charge accounts

- Contact your Australia Post representative.

To add and remove your customer's charge accounts

- You must have Administrator privileges to maintain your customer's accounts on your account.

1.3.5 Navigating Around e-LMS

Navigation Menu

To perform a particular task, you must first navigate your way to the page that provides the functions you need. The main tasks are displayed on the navigation menu, which appear as tabs across the top of the page:

red = current task
blue = available task
grey = task is not currently available

This menu will change as you move around e-LMS. The tasks available from the navigation menu will depend on your current location, and what you are doing on that page. For example, a related task may be shown as unavailable (grey) until you have completed your current task.

To select a new task

- If available (blue tab), click the tab on the navigation menu corresponding to the task you want to perform.
- If not available (grey tab), you must complete the current task before you will be able to select that task.

Multi-step Tasks

Tasks that cannot be sensibly displayed on a single page may be split into two or more steps. In multi-step tasks, an additional navigation menu will be displayed:

To proceed to the next step

- Click the **Continue** button displayed at the bottom of the page.

You will not be permitted to proceed to the next step until you have successfully completed all mandatory fields on the current page. In this case, when you click the Continue button, the current page will be re-displayed highlighting the fields you need to complete or modify.

To return to a previous step

- Click the navigation bar corresponding to the step you want to return to.

To complete the task

- When you have reached the final step of the task, and completed all the mandatory fields on that page, click the command button at the bottom of the page, for example the **Submit** is displayed at step 3 of creating a new Mailing Statement.

The **Continue** button will be displayed on all intermediate steps, except the final page.

Internet Explorer Toolbar

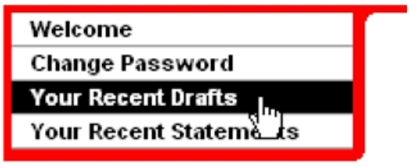
When navigating between pages, avoid using the Internet Explorer Toolbar. Use of the Back button in particular may give unexpected results:

1.3.6 Performing Tasks

You perform tasks by selecting options, entering values and selecting commands from menus, fields and buttons on the current page.

Task Menus

You may be given options relating to the current page on a submenu displayed on the left of the page, below the navigation menu. For example, on the home page, you can select from the following options:



Fields

Your task selections are made in fields, which may appear in several forms on the page:

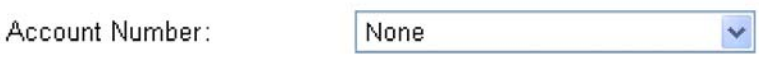
Text box:

To enter text in a text box:

1. Click inside the box.
2. Type text and numbers into the box observing the notes displayed below the box.

   When you have finished typing, check the text in the box before moving to another field. You can select another field with the cursor, or use the Tab key to move to the next field, or select a command button to perform the task.

Drop list:



To select an option from a drop list:

1. Click the list button on the right of the box. The list of available options will be displayed.
2. Select an option from the list with the cursor.

   The selected option will be displayed in the box. You can now select another field with the cursor, or use the Tab key to move to the next field, or select a command button to perform the task.

Checkbox:

To select and clear a checkbox option:

1. Click inside the checkbox with the cursor to select and clear the checkbox.

   The option is selected when a tick mark is displayed in the checkbox.

Mandatory and Optional Fields

Any field displayed **in bold** with a red asterisk (*) is mandatory and must be completed or selected before the current task or step can be completed. Other fields are optional and need only be selected if required.

Validation

Some fields may be validated to ensure the correct data has been entered, and all mandatory fields have been completed. If an error is detected, the page will be re-displayed with the fields that require your attention highlighted. For example:

Command Buttons

To perform a task, you must click a command button. The button will be labelled with the command it will perform; for example, clicking **Print** will print the current page. You must complete all mandatory fields before selecting a command.

Other options available on the page

help with this page

- Click to open and close the on-screen help message, which is specific to the current page.

user guide

- Click to display online help.

printable

- Click to display the print-friendly version of the current page.

logout

- Click to end your e-LMS session.

2 Getting Started

2.1 Getting Started

What do you want to know about?

- What do I need to use e-LMS?
- How do I login?

2.2 Prerequisites for using e-LMS

The following are required to use an interactive e-LMS account:

2.2.1 Experience

- Basic familiarity with bulk mail procedures.
- Basic keyboard skills and familiarity with internet browsing.

2.2.2 Internet access

- Modem: 56k or greater.

2.2.3 Personal computer

- CPU: Pentium I or greater.
- RAM: 32 Megabytes or greater.
- Hard disk storage: 50 Megabytes or greater.
- Operating system: Microsoft® Windows 95, 98, NT4, 2000, XP Home, XP Pro or later.

2.2.4 Browser

- Microsoft® Internet Explorer 5.5 (SP1) or later.
- Mozilla Firefox® 1.5 or later

2.2.5 e-LMS

- A valid e-LMS customer account.
- A valid user login.

2.3 Logging In

To use e-LMS, you must have a valid Australia Post e-LMS account.

To login to e-LMS:

1. Start your internet browser.
2. In the address field, type `http://online.auspost.com.au/elms` and press ENTER. To avoid having to type this address every time you log in, save it as a favourite on your browser.
3. Press ENTER and wait for the e-LMS login page to display.
4. Type your **Username** and **Password** in the fields displayed.
5. Click **Log in**.

Forgotten your login details?

- Contact your e-LMS account administrator for assistance.

Having problems logging in?

1. Check that you have typed in the correct Username and Password. These fields are case sensitive, so you must use both upper and lower case letters.
2. If you are still having problems, your account may have expired, or may be suspended. Please contact your e-LMS account administrator to obtain assistance.

2.4 Logging In with Non-Conformance Issues

You will be alerted if any new statements have non-conformance issues. You must view and acknowledge the non-conformance issues before you will be permitted to proceed to your home page. A Mailing Statement with a non-conformance alert is approved for processing; however future orders may be rejected if these non-conformance issues are not rectified.

To view and acknowledge the non-conformance issues

1. Click the **View** button adjacent to that Mailing Statement.
   Details of the statement and the non-conformance issues will be displayed.
2. Click **Acknowledge** .
3. Repeat until you have acknowledged all Mailing Statements with non-conformance issues.

2.5 Your Home Page

The following information will be displayed on your home page:

Your Recent Drafts

Recent statements that have been saved as drafts and have yet to be submitted.

Your Open Progressive Statements

Recent statements that have been saved as drafts and have yet to be submitted.

Your Recent Approved & Invoiced Statements

Recent statements that have been finalised with a status of "Approved & Invoiced".

From your home page, you can:

4. **Edit** and **Cancel** recent drafts.
5. **View** recently finalised Mailing Statements.

- Use the navigation menu to locate the information and functions you need.
- Use the options menu to perform tasks, and to change your password.
- Click user guide to display online help.
- Logout.

2.6 Session Time-out

As a security measure, you will be automatically logged out of e-LMS if your page is inactive for a period of time. The time-out period is defined in your user profile and can only be changed by the system administrator.

What happened to the Mailing Statement I was working on?

Your Mailing Statement will be saved as a draft, which you can continue editing the next time you login. No data will be lost.

What happens when I log in after a time-out?

The system will return you to your home page. If you were editing a Mailing Statement, the data will be saved in a draft.

Can I change the time-out period?

The time-out period is intended to protect both you and Australia Post from unauthorised use of your account. The length of the time-out period is specifically designed to cater for the needs of a typical user.

2.7 Blocked Account

If you attempt to login with an invalid password, your user account will be blocked on the third attempt. To re-activate a blocked account, you must contact your e-LMS administrator.

2.8 Change Password

The rules for creating a password are:

- Must contain at least 8 characters and not longer than 32 characters.
- Passwords are case sensitive.
- You cannot re-use an old password.

To change your password:

1. From the navigation menu, click **Home**
   Your home page will be displayed.
2. From the task menu, click **Change My Password**.
   The Change Password page will be displayed.
3. In the **Current Password** field, type your current password.
4. In the **New Password** field, type your new password.
5. In the **Confirm New Password** field, type your new password again.
6. Click **Change Password**.

2.9 Logging Out

To logout from this session, click **logout**, which can be found at the top-right corner of every page.

3 Business Procedures

3.1 Business Procedures

What do you want to know about?

- Procedures for Originating Customers
- Procedures for Mail Generators

3.2 Business Procedures for Originating Customers

The business procedures and tasks related to bulk mail lodgements are listed below:

Business Procedure	Related e-LMS Tasks
Query the status of a statement	• Search for statements • View a Mailing Statement • Download and print a statement • View audit trail
Statement is part of a progressive lodgement	• View details of a progressive lodgement
Validate invoice	• View a Pricing Statement • Reconcile your account against lodgements • Create reports • Query your account

3.3 Business Procedures for Mail Generators

The business procedures and tasks related to generating a Mailing Statement are listed below:

Business Procedure	Related e-LMS Tasks
Make a single lodgement	• Create a new Mailing Statement • Submit a statement • Save and edit drafts • Upload an XML statement • Cancel a draft
Make a progressive lodgement	Rules for progressive lodgements • Create a Progressive Mailing Statement • Add a statement to a progressive lodgement • Cancel a progressive lodgement
Mail is lodged at Lodgement Point	What happens when a statement is submitted?
Mail has non-conformance issues	• Acknowledge non-conformance alerts
Mail job is approved	• Check the status of a statement
Mail job is rejected	Reasons why mail may be rejected • Check the status of a statement • Modify a rejected statement • Cancel a rejected statement • View audit trail
Query the status of a statement	• Search for statements • View a Mailing Statement • View a Progressive Mailing Statement • Download and print a statement View audit trail
Progressive lodgement is completed	• Close a progressive lodgement
Customer validates invoice	• View a Pricing Statement

4 Generating Mailing Statements

4.1 Generating Mailing Statements

The details of your order must be specified in a Mailing Statement. This provides the information needed to price the mail services provided, and to identify and track the mail job.

What do you want to know about?

- Creating Mailing Statements
- Progressive Mailing Statements
- Approval of Mailing Statements
- Dealing with Rejected Statements
- Searching for Mailing Statements

4.2 Creating Mailing Statements

4.2.1 Creating Mailing Statements

What to you want to do?

- Create a new statement
- Confirm details and submit
- Save and edit draft statements
- Upload a Mailing Statement
- Cancel a draft

4.2.2 Create a New Mailing Statement

From the navigation menu, click **New Mailing Statement**. Creating a new statement is a multi-step task. You must at least complete all the mandatory fields ( ) before proceeding to the next step. The following information is displayed at each step in the statement:

Step 1: Your Details

Generating Customer
Your details are displayed. This information is supplied by the system and cannot be changed here.

Generating User
The details of the person creating the mailing statement are displayed. This information is supplied by the system and cannot be changed here.

Job Reference
The following information is needed for billing, and to help you identify the Mailing Statement when you search, view and print statements.

The fields displayed on the page will reflect the tasks you are authorised to perform. For example, the Progressive Mailing Statement field will only be displayed if you are authorised to make progressive lodgements.

• Progressive Mailing Statement
Select the charge account number this order will be billed to. Click the drop list button to display the available accounts. Select from either the list of **Your Accounts**, or from the list of **Your Customer's Accounts**. You can only select from the accounts displayed in this list. You have the option to create a single lodgement, or to add the new statement to a Progressive Mailing Statement.

If you are creating a single lodgement:
• In the **Progressive Mailing Statement** field, select **No (Single Lodgement)**.

To add the statement to an existing Progressive Mailing Statement:
• In the **Progressive Mailing Statement** field, select from the list of existing Progressive Mailing Statements.

To add the statement to a new Progressive Mailing Statement:
• In the **Progressive Mailing Statement** field, select **Create New Progressive MS.**

• Account Number
Select the charge account number this order will be billed to. Click the drop list button to display the available accounts. Select from either the list of **Your Accounts**, or from the list of **Your Customer's Accounts**. You can only select from the accounts displayed in this list.

• Originating Customer Name
If this job is being submitted on behalf of one of your customers (you chose an account from "Your Customer's Accounts"), the originating customer's name will be displayed. If this is your own job (you chose an account from "Your Accounts"), your business name will be displayed plus any 'Customer Names' that have been added to your Customer's profile.

• Unique ID
Type a unique job identifier on which you can search for this order in the database.
• Job Number
Type your job reference number.

• Job Name
Type the name of the job.

• Invoice Reference Details
Type additional reference information. *Lodgement Details*

• **Lodgement Point**
Select the charge account number this order will be billed to. Click the drop list button to display the available accounts. Select from either the list of **Your Accounts**, or from the list of **Your Customer's Accounts**. You can only select from the accounts displayed in this list.

Click the drop list button and select from the list of available Lodgement Points. You can only select from the locations displayed in this list.

• **Paid in Cash**
Select the checkbox if you will be making payment on presentment of this Mailing Statement at the Lodgement Point or at an Australia Post Business Centre.

Step 2: Line Items

The items currently added to this statement are displayed in the **Line Items** section at the bottom of the page.

You can add items with multiple product types on the same Mailing Statement.

To add a new line item:

1. In the **Add New Article** section, from the **Product Grouping** list box, select the product type.
Article types applicable to the select product type will be displayed.
If a cubing relevant product is requested, a link to the **Cubic Weight Calculator** displays.
1. Click **Cubic Weight Calculator**. The Cubing Calculator window displays.
2. Complete the fields.
3. Click Calculate. The cubic weight is calculated and displayed. This can then be used to populate the weight field in the previous screen.
4. Click Close to continue.
2. From the **Article Type** list box, select the type of article.
The lodgement conditions and contracts applicable to the selected article type will be displayed.
3. If displayed, read the **Lodgement Conditions**.
4. From the **Select Contract** drop box, select either Full Rate or a contract from the list.

Only contracts applicable to the product type at the selected lodgement point will be displayed.
If the line item is lodged on Full Rate pricing, the text 'Full Rate' will not appear on the pricing and mailing statement. However, if lodged using a contract, then the contract number is included on the pricing and mailing statement.
If there is a contract to lodge for a product/account/lodgement point combination, the **Select Contract** drop box is replaced by the **Select Contract or Full rate** drop box.
If there are no contracts to lodge the article, the drop box does not display.
5. Answer the questions displayed specific to the selected contract or product.
6. In the **Number of Articles** table, type the number of articles corresponding to the categories shown. You can make multiple entries in this table.
7. For **Internal Chargeback ,** Select the Chargeback Cost Centre from the list to link the article
8. Check the details you have typed and click **Add This Article**.
The page will refresh with the new item displayed in the **Line Items** section.
8. Repeat steps 1 to 7 until you have added all items required on this statement.

To change a line item quantity:

1. In the **Line Items** section, click **Modify Quantity**.
2. Change the number of articles in the Quantity field.
3. Click **Save**.
The page will refresh with the new item quantity displayed in the **Line Items** section.

To delete a line item:

• In the **Line Items** section, click **Delete** next to the item you want to delete.
The page will be refreshed with the item removed.

Step 3: Confirm

The details you have entered will be displayed. Please check that the details you have entered on this statement are correct, taking note of the **Lodgement Conditions** for each type of product, and carefully read the **Customer Certification** before submitting this statement.
Lodgement Conditions and Disclaimer Text are only displayed during mailing statement creation. When the mailing statement is accessed via a search, this text does not appear on the mailing statement.

4.2.3 Submit a Mailing Statement

On the third and final step of creating a new Mailing Statement, you will be asked to confirm the details of your order. When you click **Submit**, the status of the statement changes from **"Draft"** to **"In Progress"** and the statement is submitted for a series of checks. These checks will identify if there are any inconsistencies in the statement or the physical mail.

At the time of creation and submission of a mailing statement that contains a line item with a unit price equal to or below a system parameter lower limit, or equal to or greater than a system parameter upper limit, the mailing statement has a status of "**Pricing Check Required**". These statements are investigated by the e-LMS Admin, Support or Controller staff who can:

- correct the potentially invalid price is correct in SAP then submit the mailing statement to SAP for re-pricing. The mailing statement is moved to the status of "**Awaiting Approval**"
- validate the submitted unit price then move the mailing statement to "**Awaiting Approval**".

Business Centre staff should contact the State Controller to initiate this process.

4.2.4 Save and Edit Drafts

While you are creating a Mailing Statement, you can click **Save Draft** at any time and return to the statement later.

To edit a draft:

1. Click the **Home** tab.
2. Locate the draft from the list of **Your Recent Drafts**.
3. Click the **Edit** button next to the draft you want to edit.

If the statement you want is not listed:

1. Click the **Search** tab.
2. Search for Mailing Statements with a **Status** of Draft.
3. From the Search Results page, in the **MS#** column, click the statement you want to edit. The draft will be displayed.
4. Click **Edit Draft**.

4.2.5 Upload a Mailing Statement

Mailing Statements can be created outside of e-LMS in the XML format. The XML file must be well-formed and must comply with Australia Post specifications. You can obtain a copy of the *e-LMS v2.0 XML Interface Programmer's Guide* from your Australia Post representative.

To upload an XML Mailing Statement:

1. From the navigation menu, click the **Upload Mailing Statement** tab.
2. Click the **Browse** button.
   Depending on the version of Windows you are running, either the **Choose File** or **Open File** dialog will be displayed. This dialog allows you to select a file on your local computer or network.
3. Navigate to the folder on your local computer or network where the XML file (.xml) is located, and select the file.
4. Click **Open**.
   The dialog will close, and the name of the file you are uploading, including the full pathname, will be displayed in the filename box on the page.
5. Click **Upload this statement**.

The contents of the XML Mailing Statement will be verified and, if the statement passes these checks, will be automatically submitted.

It is your responsibility to ensure any uploaded XML statements have been successfully submitted.

Once the statement has been uploaded and submitted, the statement is processed and viewed like any other statement. Refer to the online user guide for information on how to view this statement in e-LMS and track its progress.

4.2.6 Cancel a Draft

You can cancel Mailing Statements that have the status of either **"Draft"** or **"Rejected"**.

To cancel a recent draft statement:

1. Click the **Home** tab.
2. Locate the draft from the list of **Your Recent Drafts**.
3. Click the **Cancel** button next to the draft you want to cancel.

To cancel any draft or rejected statement:

1. Click the **Search** tab.
2. Search for Mailing Statements with a **Status** of "Draft" and/or "Rejected".
3. From the Search Results page, in the **MS#** column, click the statement you want to edit. The statement will be displayed.
4. From the View Mailing Statement page, click **Cancel this Statement**.
   Summary details of the statement will be displayed.
5. Type any additional information in the **Comments** field.
6. Click **Cancel this statement**.

4.3 Progressive Mailing Statements

4.3.1 Progressive Mailing Statements

You can use a Progressive Mailing Statement to group Mailing Statements created successively for the same job on the same charge account. The Progressive Mailing Statement collects the details from all the statements in the batch and provides you with a progressive report on the entire mail job. The Mailing Statements contained in the batch are otherwise processed and billed like any other statement.

The tasks described below will only be displayed in e-LMS if you are authorised to make progressive lodgements.

What do you want to know about?

Rules for Progressive Mailing Statements

What do you want to do?

- Create a Progressive Mailing Statement
- View Progressive Mailing Statements
- Add Mailing Statements to a progressive lodgement
- Close a Progressive Mailing Statement
- Cancel a Progressive Mailing Statement

4.3.2 Rules for Progressive Lodgements

These business rules must be applied by e-LMS users and are not necessarily enforced by the system.

The following rules and guidelines must be observed when making progressive lodgements:

- Progressive lodgements can only be made by authorised customers.
- You must create a new Progressive Mailing Statement for each product code. Mailing Statements in the same progressive batch must use the same product code.
- The Progressive Mailing Statement must be closed manually by the customer after 30 days. The number of days the Progressive Mailing Statement has been open will be displayed when you view the statement.
- The customer must advise the Australia Post Lodgement Point recorded on the statement when each Progressive Mailing Statement is closed.
- Cash payments are not available for progressive lodgements.

4.3.3 Create a Progressive Mailing Statement

When you create a new Mailing Statement, you are given the option to:

- Create a single lodgement (the statement will not be added to a Progressive Mailing Statement), or
- Add the statement to an existing Progressive Mailing Statement, or
- **Create a new Progressive Mailing Statement**.

  When creating a new Mailing Statement, in the **Progressive Mailing Statement** field, select **Create New Progressive MS.**

When you create a new Progressive Mailing Statement, you must specify the name of the Originating Customer, the charge account number, the Lodgement Point and other information that is common to all Mailing Statements in the Progressive Mailing Statement. When you subsequently add further statements to a Progressive Mailing Statement, these details can not be edited. The only reference field that can be edited in a Progressive Mailing Statement lodgement is the Unique ID.

4.3.4 Add a Statement to a Progressive Mailing Statement

When you create a new Mailing Statement, you are given the option to:

- Create a single lodgement (the statement will not be added to a Progressive Mailing Statement), or
- **Add the statement to an existing Progressive Mailing Statement**, or

  When creating a new Mailing Statement, in the **Progressive Mailing Statement** field, select from the list of existing Progressive Mailing Statements.
- Create a new Progressive Mailing Statement.

Alternatively, from your home page, in the **Your Open Progressive Mailing Statements** section, select the **Add MS** button adjacent to the Progressive Mailing Statement you want to add the new statement to. The New Mailing Statement page will be displayed with the selected Progressive Statement No. displayed in the **Progressive Mailing Statement** field. You can also add statements when you view a Progressive Mailing Statement.

When you add statements to a Progressive Mailing Statement, the account information, job details, lodgement point and product code can not be edited, as these details are common to all statements in the batch.

4.3.5 Close a Progressive Mailing Statement

Progressive Mailing Statements must be closed every 30 days. The timing will depend on your own billing cycle and in-house reporting needs. Progressive statements must be closed manually by the Mail Generator.

You must advise the Australia Post Lodgement Point recorded on the statement when each Progressive Mailing Statement is closed.

When you view a Progressive Statement, you can close the progressive statement by clicking the **Finalise** button. This command button will only be available if all statements contained in the batch have reached the status of **"Approved & Invoiced"**, **"Reversed"** or **"Cancelled"**.

Once closed, you can locate a Progressive Mailing Statement (and summary Pricing Statement) from the search page, or by viewing the audit trail of any of the original Mailing Statements in that batch.

The Mailing Statements contained in a Progressive Statement are billed progressively and individually, as they are finalised, like any other Mailing Statement. The summary Pricing Statement is provided for reporting purposes only.

4.3.6 Cancel Progressive Mailing Statements

When you view a Progressive Statement, you can cancel the progressive statement by clicking the **Cancel** button. This command button will only be available if all statements contained in the batch have the status of **"Cancelled"**.

To cancel a Mailing Statement:

1. Click the **View** button adjacent to the statement you want to cancel.
2. From the View Mailing Statement page, click **Cancel this statement**.
   Summary details of the statement will be displayed.
3. Type any additional information in the **Comments** field.
4. Click **Cancel this statement**.

4.4 Approval of Mailing Statements

4.4.1 Approval of Mailing Statements

Mailing Statements are subjected to various system and manual checks before they are approved for delivery and can be finalised.

What do you want to know about?

- What happens when I submit a Mailing Statement?
- Why has my Mailing Statement been rejected?
- Who can approve a Mailing Statement?

4.4.2 What Happens when I Submit a Mailing Statement?

When you submit a Mailing Statement, the status of the statement changes from **"Draft"** to **"In Progress"** and a number of automated system checks are performed. If the statement passes these checks, a Pricing Statement is generated by the ERP, and the status changes to **"Awaiting Approval"**. The Pricing Statement reflects the details of the statement, and is the basis on which the service will be invoiced.

If there are problems with any of the system checks, the statement will either remain **"In Progress"** until the problems are resolved, or, the statement will be **"Rejected"**. The reasons for rejection will be recorded and can be viewed from the audit trail.

When you dispatch the physical mail to the nominated Lodgement Point, additional manual checks will be performed to ensure that the physical mail matches up with the details in the Mailing Statement, and hence the correct price is charged for the service. If the mail passes the manual checks, the status of the statement will then change to **"Approved & Invoiced"**. If there are problems with any of these checks, the order may be rejected, and will show a status of **"Rejected"**. The reasons for rejection will be recorded and can be viewed from the audit trail.

The statement may also be approved "with non-conformance issues". In this case, the mail generator or agent will be alerted to these issues, but the order will still be processed.

The other possible status values include:

"On Hold"
The order is being held, usually at the request of the customer, for operational or logistical reasons.

"Approved Awaiting EPOS Pricing"
The order requires payment to be made before it can be finalised.

"Reversed"
An approved statement has been reversed either because the mail was never lodged, or because the wrong customer account was used on the original order.

"Cancelled"
The order has been cancelled by, or at the request of, the customer.

For more information, see Lifecycle of a Mailing Statement.

4.4.3 Why has my Mailing Statement been Rejected?

A Mailing Statement may be rejected due to errors with addressing the physical mail, use of an ineligible product category, differences in declared and actual values, or exceeding the credit limit on the originating customer's account. You can view the rejection reasons from the audit trail.

Any one of the following issues may result in rejection of a Mailing Statement:

Addressing Errors

Failed CBQA test

- Barcode data not matching address
- Barcode on tray label fails
- Barcode unreadable
- Failed dimensional analysis only
- Incorrect/ not updated sortplans

Incorrect Addressing

- Address Block
- Address Format, Font &
- Barcode clear zone

Product Category Errors

Delivery zone

- Declared higher pricing than actual delivery zone
- Declared lower pricing than actual delivery zone

Incorrect PreSort category

- Direct Tray declared Other State is Same State
- Direct Tray declared Same State is Other State
- Not eligible for Direct tray
- Not eligible for PreSort

Incorrect Print Post category

- Insufficient volume
- Not eligible for LPD
- Not eligible for Print Post Service
- Not eligible for SPD

Not eligible for Clean Mail

- Address contains corrupted barcode
- Insufficient volume
- Not Machine addressed
- Plastic wrapped

Service delivery

- Declared airmail but actual is surface mail
- Declared higher pricing than actual service
- Declared lower pricing than actual service
- Declared surface mail but actual is airmail

Size/weight/thickness/shape

- Declared at higher pricing than actual category
- Declared at lower pricing than actual category

State Categories

- Declared higher pricing than actual
- Declared lower pricing than actual

Credit Limit Problems

- If lodged on your own account, contact your Australia Post account representative.
- If lodged on your customer's account, advise the customer to contact their Australia Post account representative.

4.4.4 Who can Approve a Mailing Statement?

Permissions have been specifically set so that the person who creates the Mailing Statement cannot approve it. You must be logged in as either an Outstation Approver or a BC Approver to approve or reject statements.

4.5 Dealing with Rejected Statements

4.5.1 Dealing with Rejection

Mail Statements may be rejected due to errors in the Mailing Statement, or in the physical mail. You must take an appropriate action before a rejected Mailing Statement will be processed.

Reasons for rejection

If the reason for rejection is a product category error:

You can either correct the Mailing Statement or cancel it. You must locate the Mailing Statement from the Search page, from where you can view, edit, resubmit or cancel it. You do not have to make corrections now, but a rejected Mailing Statement will not be processed until it has been corrected and re-submitted.

If the reason for rejection is an addressing error:

You must contact the Business Centre where the mail was lodged.

If the reason for rejection is related to the credit limit on the customer's charge account:

You must contact your Australia Post account representative.

To search for rejected Mailing Statements

1. Click the **Search** tab.
2. Search for Mailing Statements with a **Status** of **"Rejected"**.
3. From the Search results page, in the **MS#** column, click the Mailing Statement you want to view.

To view rejection reasons

1. From the View Mailing Statement page, click **View Audit Trail**.
2. Locate the audit trail record that records the rejection.
3. The rejection reasons will be listed in the **Details** column.

To modify and resubmit a rejected Mailing Statement

1. From the View Mailing Statement page, click **Modify Rejected**.
2. Make the corrections required.
3. On the final edit page (Step 3. Confirm), click the **Submit** button.

To cancel a rejected Mailing Statement

1. From the View Mailing Statement page, click **Cancel this statement**.
   Summary details of the statement will be displayed.
2. Type any additional information in the **Comments** field.
3. Click **Cancel this statement**.

4.5.2 Check the Status of Mailing Statements

The status of a Mailing Statement will tell you the stage the order has reached in the lifecycle of the statement . To identify the status of statements, you must search the database for the statements you want to check:

1. Click the **Search** tab.
2. Select search criteria that will identify the statements you want to find. For example, type the **Unique ID** for an order, or search for multiple statements by date range with the **From Date** and **To Date** fields. You can use more than one search criteria.
3. Click **Search**.
4. The status of statements found by your search will be displayed in the **Status**

column. To identify why a statement has been rejected, view the audit trail.

4.5.3 Modify a Rejected Mailing Statement

If a Mailing Statement has been rejected, you must locate the statement, modify it and resubmit it. When you resubmit the amended statement, the status will change from **"Rejected"** to **"In Progress"**. The resubmitted statement will then be re-checked before it can be approved.

Any rejected statements that are over a month old will be automatically cancelled by the system.

To locate, modify and resubmit a rejected statement:

1. Click the **Search** tab.
2. Search for Mailing Statements with a **Status** of Rejected.
3. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to edit.
   The Mailing Statement will be displayed.
4. Click **Modify Rejected**.
5. Make the corrections required.
6. On the final edit page (Step 3. Confirm), click the **Submit** button.

4.5.4 Cancel a Rejected Mailing Statement

To cancel a rejected Mailing Statement, you must first locate the statement you want to cancel. When you cancel a rejected statement, the status will change from **"Rejected"** to **"Cancelled"**. Cancelled statements are not deleted from the database, and can be searched for and viewed like any other statement.

Any rejected statements that are over a month old will be automatically cancelled by the system.

To locate and cancel a rejected statement:

1. Click the **Search** tab.
2. Search for Mailing Statements with a **Status** of "Rejected".
3. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to cancel.
   The Mailing Statement will be displayed.
4. Click **Cancel this statement**.
5. Type any additional information in the **Comments** field.
6. Click **Cancel this statement**.

5 Searching for Mailing Statements

5.1 Searching for Mailing Statements

Mailing Statements are stored in the e-LMS database, which you can access from the Search page.

What do you want to do?

- Find Mailing Statements
- View Mailing Statements
- View Progressive Mailing Statements
- Batch Approve Nailing Statements
- Download and Print Mailing Statements
- View the Audit Trail

5.2 How to Find Mailing Statements

You can search for and view any statement, including drafts, statements that are being processed, and statements that have been finalised. You must select search criteria to locate the statements you want; for example, you can search for all rejected statements, or use the Unique ID to find a particular statement.

5.2.1 Using multiple search criteria

When you use more than one search criteria, the statements found by the search will match all criteria. For example, if you specify:

From Date: 01/09/2005

To Date: 30/09/2005

Status: Approved & Invoiced

and leave all other criteria blank, the search will locate only those statements that are finalized and were submitted in the month of September 2005.

Search criteria

The following criteria are available from the search page:

Field	Description
Generating Customer Name	The business name of the Mail Generator that created and submitted the statements.
From Date	Locates statements that were submitted on or after this date.
To Date	Locates statements that were submitted on or before this date.
Lodgement State	The State where the statement was lodged.
Lodgement Point	The Mail Centre where the statement was lodged.
Mailing Statement Number	System generated Mailing Statement Number.
Progressive Mailing Statement Number	System generated Progressive Statement Number.
Unique ID	Unique identification code for Mailing Statements supplied by the mail generator.
Job Number	The mail generator's own job number.
Job Name	The mail generator's own job name.
Invoice Ref	The mail generator's own invoice reference.

Originating Customer Name	The name of the originating customer, as entered by the mail generator.
Account Number	The charge account number.
Status	The current status of the Mailing Statement.

To search for a statement:

1. Click the Search tab.
2. **Step 1: Search Details**
   Select one or more search criteria that will identify the statements you want to find. For example, type the **Unique ID** for an order, or search for multiple statements by date range with the **From Date** and **To Date** fields. You can use more than one search criteria.
3. Click Search.
4. **Step 2: Search Results**
   The statements that match your search criteria will be displayed.

5.3 Viewing Mailing Statements

To view a statement, you must find the statement and then select the statement (or statements) you want to view from the search results page. From the Search Results page, you can:

- In the MS# column, click the Mailing Statement you want to view.
- Use the checkboxes on the left of the page to select one or more statements, and click **View MS**.

From the View Mailing Statement page, you can then:

- Download and print statements
- Edit and cancel drafts
- Modify and cancel rejected statements
- View Pricing Statements
- View the audit trail

5.4 View a Progressive Mailing Statement

On your home page, the most recent Progressive Mailing Statements that are currently open are listed in the **Your Open Progressive Mailing Statements** section. To view a Progressive Mailing Statement, click the **View** button adjacent to the statement you want to view.

When you view a Progressive Mailing Statement, the information that is common to all statements in the progressive lodgement will be displayed at the top of the page. The statements that have been added to the progressive lodgement are listed in the **Mailing Statements** section. The list of statements includes the Mailing Statement No., the date the statement was lodged, and the status of each statement.

From the Progressive Mailing Statement page, you can:

- View details of each statement contained in the progressive lodgement
- Add new statements to the progressive lodgement
- Close the progressive lodgement
- Cancel the Progressive Mailing Statement

If the progressive statement you want to view is not listed, you can:

- **View the full list of open Progressive Mailing Statements**

  From your home page,

  1. From the task menu, click **Progressive Statements**.
  2. Click the **View** button adjacent to the statement you want to view.

- **Find all statements that belong to a progressive lodgement**

  1. Click **Search**
  2. In the **Progressive Mailing Statement Number** field, type the Progressive Mailing Statement number.
  3. Click **Search**.

  The Mailing Statements that belong to the specified progressive lodgement will be displayed on the Search Results page. From here you can view one or more statements.

5.5 Downloading and Printing

If the Mailing Statement has been previously printed, the "printed" icon will appear in the first column on the Search Results page.

When you search for Mailing Statements, the statements that match your search criteria will be displayed on the Search Results page. Use the checkboxes on the left of the page to select the statements that you want to print or download.

To print the selected statements:

1. Click **View MS**.
2. At the top-right corner of the page, click **printable**. The print-friendly version of the page will be displayed.
3. Click **Print**.
   The **Print** dialog will be displayed.
4. Select your printer and printing options, and click **Print**.

To download the selected statements:

1. From the View Mailing Statement page, click **Download MS**.
2. Select either **XML** or **CSV** format for the downloaded file The **File Download** dialog will be displayed.
3. Click **Save**.
   The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.
   The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.
5. When the download is complete, you can either:
   - Click **Open** to view the file.
   - Click Open Folder to display the files in the folder.
   - Click Close.
6. Close the **Download File** dialog.

You should always check the **Status** column before you view, download and print a statement. In particular, draft statements are subject to change, or may be cancelled without being submitted. Draft statements may be listed on the Search Results page unless you specifically exclude them from your search. To exclude draft statements from your search, from the Search Details page, in the **Status** section, clear the **Draft** checkbox.

5.5.1 XML and CSV Formats

Downloadable versions of the Mailing Statement are available in both XML and CSV formats. The XML file conforms to the published XML schema for e-LMS Mailing Statements. You can view CSV files in a spreadsheet program, or import directly into a database.

5.6 View Mailing Statement Audit Trail

You can view a complete transactional history over the entire lifecycle of a Mailing Statement. To view the audit trail of a statement, you must find the statement and then select the statement you want to view from the search results page.

To view the audit trail of a statement

1. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to view. The Mailing Statement will be displayed.
2. From the View Mailing Statement page, click **View Audit Trail**.

To print the audit trail report

From the View Audit Trail page,

1. At the top-right corner of the page, click **printable**. The print-friendly version of the page will be displayed.
2. Click **Print**.
   The **Print** dialog will be displayed.
3. Select your printer and printing options, and click **Print**.

Audit Trail Report

The following information will be displayed in Audit Trail Report:

The audit trail report is in date order.

Column	Description
Date	The date the task was performed. The time recorded is in the time zone of the Lodgement Point at which the MS is lodged.
UserID	The Username login that performed the task.
Status	The status after the task was performed.
Detail	Details of the task performed including rejection reasons.

6 Reporting

6.1 Reports

You can select from the following standard reports:

- Lodgements
- Reconciliation
- Users
- Chargeback Items

6.2 Lodgements Report

You must login as Administrator to view this report.

The Lodgements Report gives summary information on your lodgements. The scope of the report can be restricted by date range, by lodgement point and by other report filters. For example, you can report on all lodgements made during the month of September.

Creating a report is a multi -step task. In this first step, you will define the filters that control the contents of the report and how you want the report outputted. If you choose to display the report, once you have verified that the report contains the information you want, you can then print or download the report.

Two download formats are available:

- CSV format files can be viewed and reformatted in a spreadsheet program, or import directly into a database.
- HTML is a widely used document format which can be viewed and edited in most word-processing programs.

When appropriate, you should always use filters to restrict the size of your report; the e-LMS database is nationwide and contains a large volume of information. Unfiltered reports will take longer to generate, are slower to download, and are more difficult to manage and format in spreadsheets.

To create and view a report:

Reports displayed on the screen are limited to a maximum of 10000 mailing statements.

1. From the navigation menu, click **Reports**
   The Reports page will be displayed.
2. From the task menu, click **Customer Lodgements**.
   The Lodgement Report page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click **Create Report**.
   Summary details of lodgements that match your filter settings will be displayed.
5. To return to the Lodgement Report page and change your filter settings, click **Back to Search** .
6. To return to the Reports page and select a different report, click **Back to Reports**.

To download a report in CSV or HTML format:

Reports displayed on the screen are limited to a maximum of 10000 mailing statements.

1. Select to create Report for CSV or HTML download or alternatively create and view the report on-screen (see above) if the report is for less than 10000 mailing statements.
2. Click the **Save Results to CSV** or **Save Results to HTML** button.
3. Click **Save**.
   The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.
   The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.
5. When the download is complete, you can either:
   - Click **Open** to view the file.
   - Click Open Folder to display the files in the folder.
   - Click Close.

6.3 Reconciliation Report

You must login as Administrator to view this report.

The Reconciliation Report gives details of the items lodged on your accounts. The scope of the report can be restricted by date range, by account number and by other report filters. For example, you can report on all lodgements made since the start of the month, on a particular account number.

Creating a report is a multi -step task. In this first step, you will define the filters that control the contents of the report and how you want the report outputted. If you choose to display the report, once you have verified that the report contains the information you want, you can then print or download the report.

Two download formats are available:

- CSV format files can be viewed and reformatted in a spreadsheet program, or import directly into a database.
- HTML is a widely used document format which can be viewed and edited in most word-processing programs.

When appropriate, you should always use filters to restrict the size of your report; the e-LMS database is nationwide and contains a large volume of information. Unfiltered reports will take longer to generate, are slower to download, and are more difficult to manage and format in spreadsheets.

To create and view a report:

Reports displayed on the screen are limited to a maximum of 10000 records.

1. From the navigation menu, click **Reports**
   The Reports page will be displayed.
2. From the task menu, click **Reconciliation**.
   The Reconciliation Report page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click **Create Report**.
   Summary details of reconciliations that match your filter settings will be displayed.
5. To return to the Reconciliation Report page and change your filter settings, click **Back to Search**.
6. To return to the Reports page and select a different report, click **Back to Reports**.

To download a report in CSV or HTML format:

Reports are limited to a maximum of 10000 records.

1. Select to create Report for CSV or HTML download or alternatively create and view the report on-screen (see above) if the report is for less than 10000 records.
2. Click the **Save Results to CSV** or **Save Results to HTML** button.
3. Click **Save**.
   The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.
   The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.
5. When the download is complete, you can either:
   - Click **Open** to view the file.
   - Click **Open Folder** to display the files in the folder.
   - Click **Close**.

6.4 View List of Users

You must login as Administrator to view this report.

You can view a list of users in your account, filtered and sorted on selected database field names. You can then either print the report directly from e-LMS, or download the report in CSV or HTML format.

The CSV format file can be viewed and reformatted in a spreadsheet program, or import directly into a database. HTML is a widely used document format which can be viewed and edited in most word-processing programs.

To view and print a list of users:

1. From the navigation menu, click Reports
   The Reports page will be displayed.
2. From the task menu, click **User**.
   The List of Users page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. **Click** Create Report.
   Summary details of users that match your filter settings will be displayed.
5. To print the list, at the top-right corner of the page, click **printable**.
   The print-friendly version of the page will be displayed.

Click Print .

The **Print** dialog will be displayed.

Select your printer and printing options, and click Print.

To return to the List of Users page and change your filter settings, **click** Back to Search .

To return to the Reports page and select a different report, click Back to Reports .

To download a list of users:

1. From the navigation menu, click Reports
   The Reports page will be displayed.
2. From the task menu, click **External Users**.
   The List of External Users page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. **Click** Create Report .
   Summary details of users that match your filter settings will be displayed.

   Click Save Results to CSV **or** Save Results to HTML . The **File Download** dialog will be displayed.
5. Click **Save**.
   The **Save As** dialog will be displayed.
6. Locate the folder where you want to save the file, and click **Save**.
   The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.
7. When the download is complete, you can either:
   - Click Open to view the file.
   - Click Open Folder to display the files in the folder.
   - Click Close.

6.5 Chargeback Items Report

You must login as Administrator to view this report.
The Chargeback Items Report gives summary information on your Chargeback. The scope of the report can be restricted by Cost Centre Code, MS Line Item Product, Chargeback Only Product, Account Number and date range. For example, you can report on all Cost Centre Codes made during the month of September.
Creating a report is a multi-step task. In this first step, you will define the filters that control the contents of the report and how you want the report outputted. If you choose to display the report, once you have verified that the report contains the information you want, you can then print or download the report.

Two download formats are available:

• CSV format files can be viewed and reformatted in a spreadsheet program, or import directly into a database.
• HTML is a widely used document format which can be viewed and edited in most wordprocessing programs.

When appropriate, you should always use filters to restrict the size of your report; the e-LMS database is nationwide and contains a large volume of information. Unfiltered reports will take longer to generate, are slower to download, and are more difficult to manage and format in spreadsheets.

To create and view a report:

Reports displayed on the screen are limited to a maximum of 10000 records.
1. From the navigation menu, click Reports.
The Reports page will be displayed.
2. From the task menu, click Chargeback items.
The Chargeback item Report page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click Create Report.
Summary details of chargeback items that match your filter settings will be displayed.
5. To return to the Chargeback item Report page and change your filter settings, click Back to Search
6. To return to the Reports page and select a different report, click Back to Reports.

To download a report in CSV or HTML format:

Reports displayed on the screen are limited to a maximum of 10000 records.
1. Select to create Report for CSV or HTML download or alternatively create and view the report on-screen (see above) if the report is for less than 10000 records.
2. Click the Save Results to CSV or Save Results to HTML button.
3. Click **Save**.
The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.
The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.
5. When the download is complete, you can either:

- Click **Open** to view the file.
- Click **Open Folder** to display the files in the folder.
- Click **Close**.

7 About Pricing and Invoices

7.1 About Pricing and Invoices

The details you enter on the Mailing Statement are used to automatically price the order and generate the invoice. The pricing details for a Mailing Statement are contained in a Pricing Statement.

What do you want to know about?

- How is the price determined?
- Invoicing and cash payments
- Viewing Pricing Statements

7.2 How is the Price Determined?

When a Mailing Statement is submitted, the details entered on the Mailing Statement, including the pricing contract and the quantities of mail items, are sent to the Australia Post ERP system for pricing. This ensures that pricing of each statement is done with the latest information, and incorporates rates from any applicable contract you may have selected on the Mailing Statement.

A Pricing Statement is generated by the ERP and sent back to e-LMS, which can be viewed by the originating customer. Only the originating customer, who is being billed for the services, is permitted to view pricing.

7.3 Invoices and Cash Payments

The details of the invoice are based on the Pricing Statement, which is auto-generated by the system and attached to the Mailing Statement. Once the Mailing Statement has been approved, the Australia Post ERP system will automatically create a billing entry in your account, which will appear on your next invoice statement.

7.3.1 Cash Payments

If you selected the "Paid in cash" option on the Mailing Statement, you must arrange to make payment for the service before it can be finalised. When the statement is approved, the status will change to **"Approved Awaiting EPOS Pricing"** and will be held until payment has been received.

7.3.2 Reconciling Your Account

You can reconcile your consolidated tax invoice against the individual Pricing Statements for each lodgement by referring to the following common fields/columns:

e-LMS Pricing Statement	Consolidated Tax Invoice
Mailing Statement No.	Refer to the **Invoice Number** column.
Customer Account Number	Refer to **Customer Account Number**.
Lodgement Point	Line items are sorted by Lodgement Point.
Sales Order Number	Refer to the **Transaction ID** column.
Invoice reference Details	Refer to the **Customer Reference** column.

If you have questions about your account:

- Contact your Australia Post account manager, who will investigate your query, and will be able to take any corrective action that may be required.

7.4 Viewing Pricing Statements

Only the originating customer, who is being billed for the services, is permitted to view pricing.

A Pricing Statement is attached to every Mailing Statement once it has passed the system checks. To view a Pricing Statement, you must find the statement and then select the statement (or statements) you want to view from the search results page. From the Search Results page, you can:

- In the **MS#** column, click the Mailing Statement you want to view. The Mailing Statement will be displayed.
- Use the checkboxes on the left of the page to select one or more statements, and click **View MS** .

You can only view pricing on statements with the status of **"Approved & Invoiced"**.

From the View Mailing Statement page, you can then choose:

To view the Pricing Statement:

You can only view pricing on statements that have been approved.

- Click **View Pricing Statement**.

To download the Pricing Statement:

You can only view pricing on statements that have been approved.

- Click **View Pricing Statement**.
- Click **Download PS**.

For more information, refer to the Downloading and Printing section in online help.

To print the Pricing Statement:

You can only view pricing on statements that have been approved.

- Click **View Pricing Statement**.
- Click **Print**.

For more information, refer to the Downloading and Printing section in online help.

Progressive Lodgements

If the Mailing Statement is part of a progressive lodgement, you can also view, download and print the summary Pricing Statement. A summary Pricing Statement will be generated when each statement in the batch reaches the status of **"Approved & Invoiced"**. The summary Pricing Statement will contain the accumulated values of all items in the Mailing Statements contained in the progressive lodgement. A Pricing Statement is also generated for each Mailing Statement in the batch. The summary pricing statement will only be available if at least one statement contained in the lodgement has reached the status of **"Approved & Invoiced"**.

To view the summary progressive Pricing Statement

1. View any statement in the progressive lodgement that has the status of **"Approved & Invoiced"**.
2. Click the **View Progressive Pricing Statement** button.

8 Managing Your Account

8.1 Managing Your Account

What do you want to do?

- Create a new user
- Maintain user accounts
- Maintain charge accounts
- Maintain customer names

8.2 Create User

You must login as Administrator to perform all user administration tasks. When the system adds a new user account, the information you supply will be checked to ensure all mandatory fields have been completed, and that the data is valid.

To create a new user:

1. Click the **Home** tab.
2. From the task menu, click **Add User**. The Create User page will be displayed.
3. Complete the user details in the displayed fields, as described in the table below.
4. Click **Save**.

The following information is displayed when creating a new user (* mandatory):

Field	Description
Customer	Your account details are displayed.
User Details	Type the new user's details in the fields below.
Username *	Type the user's username.
First Name *	Type the user's first name.
Last Name *	Type the user's last name.
Address	Type the user's address.
Phone	Type the user's phone number.
Fax	Type the user's fax number.
E-mail *	Type the user's email address.
Authorisation Details	Select the role and other account details for this user in the fields below.
Role *	Select from the available user roles.
Default Lodgement State *	This field will only be displayed if you are a Mail Generator. The State where this user lodges mail.
Start Date *	Select the date the user account will be available.
End Date	Optional expiry date for this account.
Active	This checkbox is used to block and unblock a user account.
Password *	Type a temporary password. The user will be asked to change the password when they login.
Confirm Password *	Type the password again.

8.3 Maintain Users

You must login as Administrator to perform all user administration tasks.

To view and edit user details:

Viewing and editing a user's details is a multi-step task.

1. Click the Home tab.
2. From the task menu, click **Modify User**.
   The Modify User page will be displayed.
3. **Step 1:** Type the user's details in one or more of the search fields: **Username** - the user's e-LMS username
   First Name
   Last Name
4. Click Search.
5. **Step 2:** Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify.
   The details of the selected user will be displayed.
6. Make the changes required. For information about the fields displayed on this page, see the table below.
7. Click Save.

To block a user account:

Viewing and editing a user's details is a multi-step task.

1. Click the Home tab.
2. From the task menu, click **Modify User**.
   The Modify User page will be displayed.
3. **Step 1:** Type the user's details in one or more of the search fields: **Username** - the user's e-LMS username
   First Name
   Last Name
4. Click Search.
5. **Step 2:** Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify.
   The details of the selected user will be displayed.
6. To block the user's account, select the **Inactive** checkbox (a tick mark is displayed).
7. Click Save.

To unblock a user account:

Viewing and editing a user's details is a multi-step task.

1. Click the Home tab.
2. From the task menu, click **Modify User**.
   The Modify User page will be displayed.
3. **Step 1:** Type the user's details in one or more of the search fields: **Username** - the user's e-LMS username
   First Name
   Last Name
4. Click Search.

5. **Step 2:** Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify.
   The details of the selected user will be displayed.
6. Clear the **Inactive** checkbox (the checkbox is empty).
7. In the **New Password** field, type a new, temporary password.
8. In the **Confirm Password** field, type the password again.
9. Click **Save**.

To reset the user's password:

Viewing and editing a user's details is a multi-step task.

1. Click the **Home** tab.
2. From the task menu, click **Modify User**.
   The Modify User page will be displayed.
3. **Step 1:** Type the user's details in one or more of the search fields: **Username** - the user's e-LMS username
   First Name
   Last Name
4. Click **Search**.
5. **Step 2:** Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify.
   The details of the selected user will be displayed.
6. In the **New Password** field, type a new, temporary password.
7. In the **Confirm Password** field, type the password again.
8. Click **Save**.

The following information is displayed on the page (* mandatory):

Field	Description
Customer	Your account details are displayed.
User Details	
Username *	The user's username.
First Name *	The user's first name.
Last Name *	The user's last name.
Address	The user's address.
Phone	The user's phone number.
Fax	The user's fax number.
E-mail *	The user's email address.
Authorisation Details	
Role *	The user's role determines the user's authorisation level. For more information on roles and permissions, refer to the relevant topics in the online user guide.
Default Lodgement State *	This field will only be displayed if you are a Mail Generator. The State where this user lodges mail.

Field	Description
Start Date*	The date the user account will be available.
End Date	Optional expiry date for this account.
Inactive	This checkbox is used to block and unblock a user account. If you are unblocking an account, you must also reset the password.
New Password	To reset the user's password, type a temporary password. The user will be asked to change the password when they login.
Confirm Password	Type the password again.

8.4 Maintain Charge Accounts

You must be logged in as the e-LMS Administrator to maintain charge accounts.

Two lists of account numbers are maintained on a Mail Generator account:

- Your own Australia Post charge account numbers.
  When creating Mailing Statements, these are referred to as **"Your Accounts"**. Only authorised Australia Post personnel are permitted to maintain these accounts.
- Your customer's Australia Post charge account numbers.
  When creating Mailing Statements, these are referred to as **"Your Customer's Accounts"**. Your in-house e-LMS administrator is permitted to maintain these accounts.

When you add an account, the system will check the account details before it is added to the list of available accounts in the **Active Accounts** list box. Accounts listed in the **Pending Accounts** list box are awaiting confirmation from the system. If the system fails to validate the account, it will be listed in the **Errored Accounts** list box.

Accounts added to the Pending Accounts list may not be available until the next business day.

After adding a customer charge account number, you should also add the customer's name.

8.4.1 Accounts

The Australia Post charge accounts of your customers are displayed.

To add and remove your customer's charge account numbers:

1. Click the **Home** tab.
2. From the task menu, click **Maintain Account**.
   The Maintain Account Numbers page will be displayed.

The charge account numbers available on your account are displayed in the **Active Accounts** list box.

To add a new charge account number:

- Type the number in the **Account Number** field, and click **Add**.

When you add an account, the system will check the account details before it is added to the list of accounts. This may take overnight to complete.

To remove a charge account number:

- Select the account you want to remove in the Active Accounts list box, and click the **Remove**
- To select a group of accounts, hold down the SHIFT key.
- To select multiple accounts, hold down the CTRL key.
- To clear your selection, click a different account number.

When you have finished maintaining account numbers, select another task from the menu, or logout.

To add and remove your own charge account numbers:

If you need to add or remove your own Australia Post charge account numbers, please contact the Help Desk.

8.5 Maintain Customer Names

You must be logged in as the e-LMS Administrator to maintain customer names.

When you create a new Mailing Statement, you can select the originating customer name from a drop-down list. The names displayed in this list are maintained by the **Customer Names** administration function.

To add a customer name:

1. From the task menu, select **Customer Names**.
2. In the **Add Customer Name** field, type the customer name and click **Add**

. The name will be displayed in the **Customer Names** box.

To remove a customer name:

1. From the task menu, select **Customer Names**.
2. In the **Customer Names** box, select the customer name and click **Remove**

. The page will refresh with the name removed.

9 Using Chargeback Functionality

9.1 Adding Chargeback Only Product

The creation of an Internal Chargeback Product is for Ext Generator Customers to create Chargeback Products for **NON-eLMS** related products. These fields allow customers to create unique product codes

Step 1: Create Code (See Image Below)

Product Code: This is a unique code that the customer assigns to Products
Description: A brief description of the product that Chargeback applies to.
Unit Cost: The unit price of each Product shown above.
Comments: Additional information that may be required for creation of this Product.

Save

Click save

Create an Internal Chargeback Product

Bold fields (also marked with a *) are mandatory.

- **Chargeback Product Details**

Product Code *

Description

Unit Cost (0.00) *

Comments

Save Cancel

9.2 Maintain Chargeback Only Product

The maintenance of an Internal Chargeback Product is for Ext Generator Customers to maintain Chargeback Products for **NON-eLMS** related products. These fields allow customers to maintain unique product codes

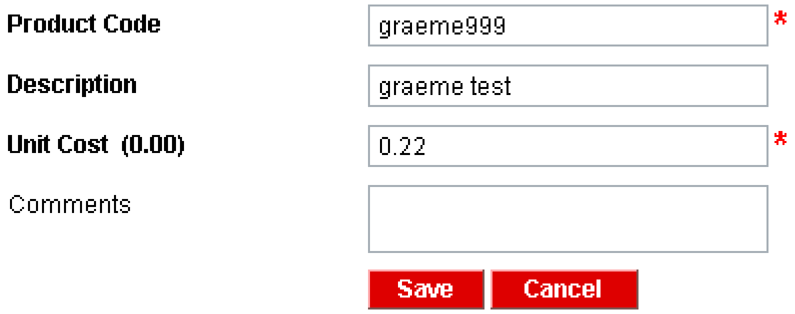
- **Maintain Chargeback Product List**

Product Code	Description	Unit Cost	Created Date		
SM2	small envelope3	$40.00	10/08/2010 14:25:06	Edit	Delete
BE1	Big envelope1	$2.00	10/08/2010 14:25:06	Edit	Delete
PR&B	Pens: red & black	$2.00	10/08/2010 14:25:06	Edit	Delete

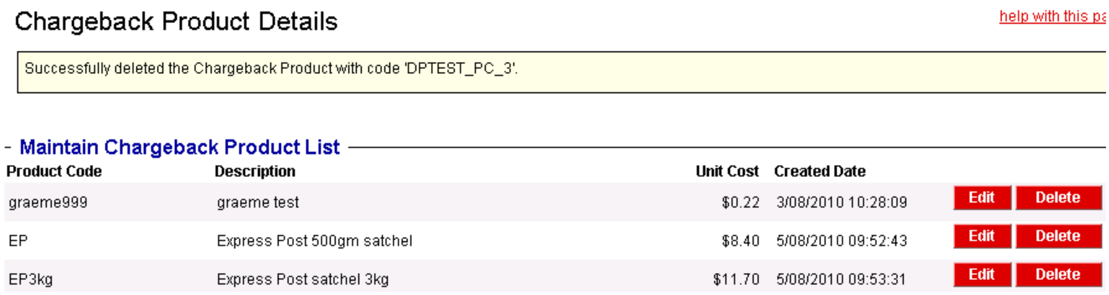
Step 1: Maintain Chargeback Code (See Image Above)

Product Code: This is a unique code that the customer assigns to Products
Description: A brief description of the product that Chargeback applies to.
Unit Cost: The unit price of each Product shown above.
Comments: Additional information that may be required for creation of this Product.

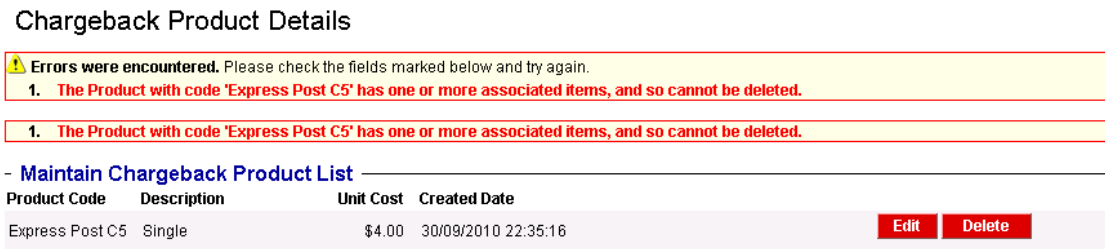
Edit Chargeback Product: Click on the Edit Button to change the product Edit
The following screen will display and you can then type over any fields as required. Once Completed, Click the save Button. Save



Delete Chargeback Product: Click on the Delete Button to remove the product.



Please note that if any codes have transactions associated with them less than 6 months old from time of creation, they cannot be deleted. The following message will display.



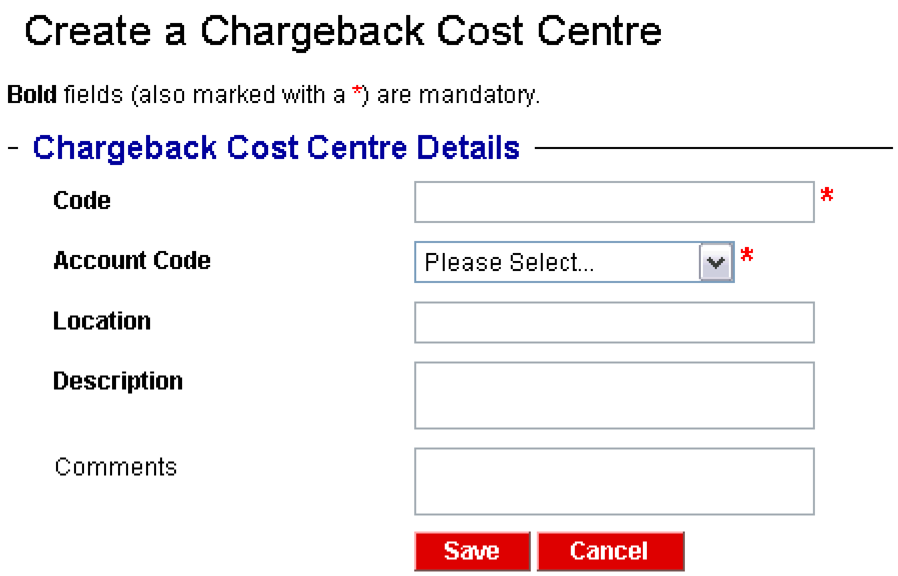
9.3 Add Chargeback Cost Centre

The creation of an Internal Chargeback Cost Centre is for Ext Generator Customers to create Chargeback Cost Centres for **eLMS and NON-eLMS** related products. These fields allow customers to create unique Cost Centres.

Step 1: Create Code (See Image Below)

Cost Code: This is a unique code that the customer creates to assign to account codes.
Account Code: This is a list of account numbers (Own Accounts) that you wish to apply the Cost Centres to. You may apply to one Account Number or all Account Numbers.
Unit Cost: The unit price of each Product shown above.
Comments: Additional information that may be required for creation of this Product.

Click save



Create a Chargeback Cost Centre

Bold fields (also marked with a *) are mandatory.

- Chargeback Cost Centre Details

Code	*
Account Code	Please Select... *
Location	
Description	
Comments	

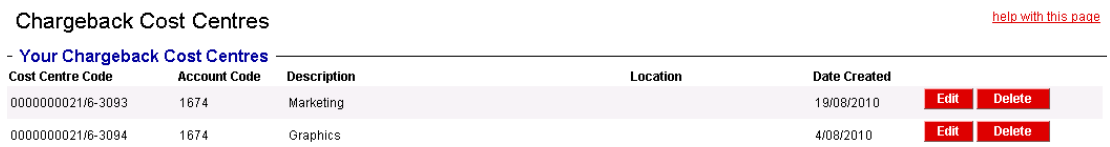
Save Cancel

9.4 Maintain Chargeback Cost Centre

The maintenance of an Internal Chargeback Cost Centre is for Ext Generator Customers to maintain Chargeback Cost Centres for **eLMS and NON-eLMS** related products. These fields allow customers edit or delete Cost Centres.

Step 1: Chargeback Cost Centres (See image below)

Cost Code: This is a unique code that the customer creates to assign to account codes.
Account Code: This is a list of account numbers (Own Accounts) that you wish to apply the Cost Centres to. You may apply to one Account Number or all Account Numbers.
Description: A brief description of the Cost Code that it applies to.
Location: A brief description of the location of the Cost Code that it applies to (not mandatory)
Date Created: Show date of when the Cost Centre Code was originally created.



Chargeback Cost Centres

help with this page

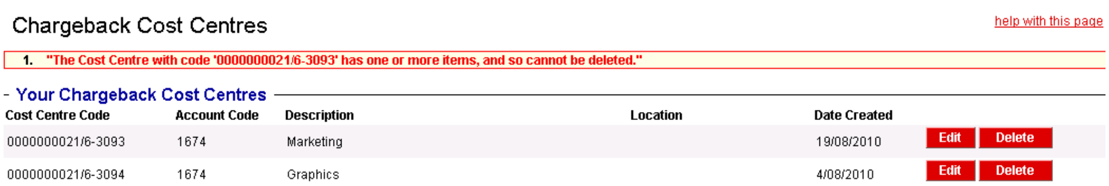
- Your Chargeback Cost Centres

Cost Centre Code	Account Code	Description	Location	Date Created		
0000000021/6-3093	1674	Marketing		19/08/2010	Edit	Delete
0000000021/6-3094	1674	Graphics		4/08/2010	Edit	Delete

Chargeback cost centres can be edited and deleted.

- To edit a cost centre, click the **Edit** button on the row you wish to change.
- To delete a cost centre, click the **Delete** button on the row you wish to remove.

Please note that if any codes have transactions associated with them less than 6 months old from time of creation, they cannot be deleted. The following message will display.



Chargeback Cost Centres

help with this page

1. "The Cost Centre with code '0000000021/6-3093' has one or more items, and so cannot be deleted."

- Your Chargeback Cost Centres

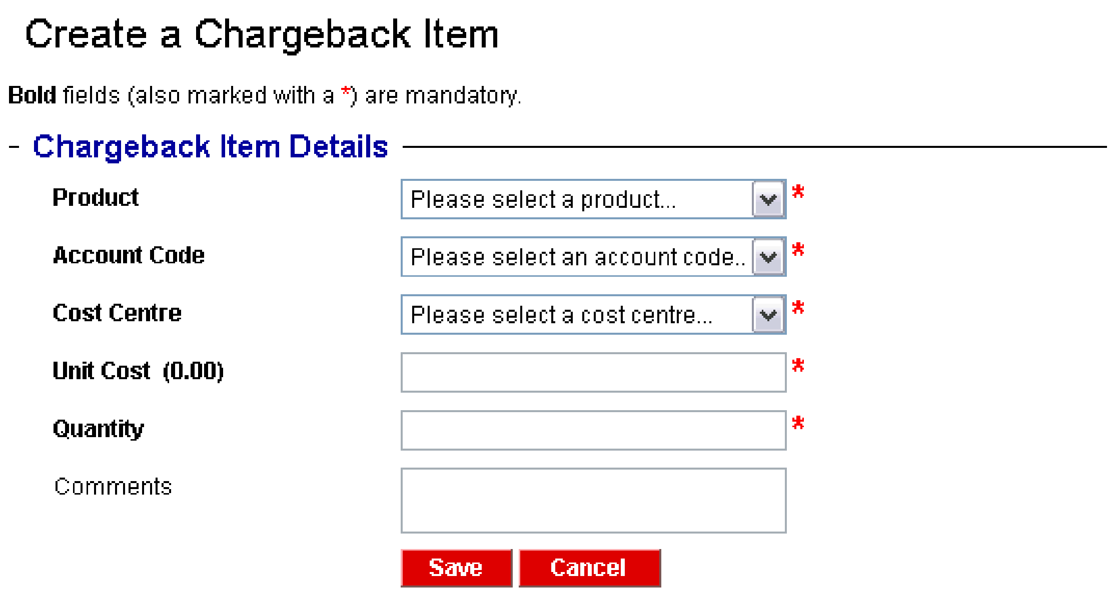
Cost Centre Code	Account Code	Description	Location	Date Created		
0000000021/6-3093	1674	Marketing		19/08/2010	Edit	Delete
0000000021/6-3094	1674	Graphics		4/08/2010	Edit	Delete

9.5 Add Chargeback Only Item

The adding Chargeback Only Item is for Ext Generator Customers to allocate NON e-LMS related products to your Internal Cost Centre Codes.

Step 1: Add Chargeback Only Item (See image below)

Product Code:	Click on the drop down to select product code from the list.
Account Code:	Click on the drop down to select an Account Code (note: amount allocated in this area does not affect your Australia Post Account).
Cost Centre:	Click on the drop down to select a Cost Centre code where the product needs to be charged to.
Unit Cost (0.00):	This unit cost is linked to the selected product code and will automatically display.
Quantity:	Enter the quantity of the product required to be charged.
Comments:	Additional information that may be required for creation of this item.
	Click save



9.6 Maintain Chargeback Only Item

The adding Chargeback Only Item is for Ext Generator Customers to allocate NON e-LMS related products to your Internal Cost Centre Codes.

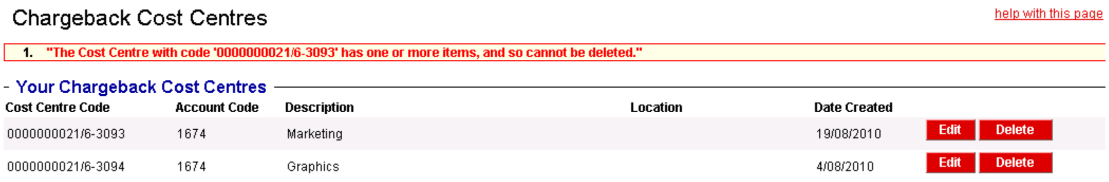
Step 1: Add Chargeback Only Item (See image below)

Product Code:	Click on the drop down to select product code from the list.
Account Code:	Click on the drop down to select an Account Code (note: amount allocated in this area does not affect your Australia Post Account).
Cost Centre:	Click on the drop down to select a Cost Centre code where the product needs to be charged to.
Unit Cost (0.00):	This unit cost is linked to the selected product code and will automatically display.
Quantity:	Enter the quantity of the product required to be charged.
Comments:	Additional information that may be required for creation of this item.
	Click save

Chargeback cost centres can be edited and deleted.

- To edit a cost centre, click the **Edit** button on the row you wish to change.
- To delete a cost centre, click the **Delete** button on the row you wish to remove.

Please note that if any codes have transactions associated with them less than 6 months old from time of creation, they cannot be deleted. The following message will display.


Chargeback Cost Centres

help with this page

1. "The Cost Centre with code '0000000021/6-3093' has one or more items, and so cannot be deleted."

Your Chargeback Cost Centres

Cost Centre Code	Account Code	Description	Location	Date Created		
0000000021/6-3093	1674	Marketing		19/08/2010	Edit	Delete
0000000021/6-3094	1674	Graphics		4/08/2010	Edit	Delete

10 Quick Guides

10.1 Quick Guides

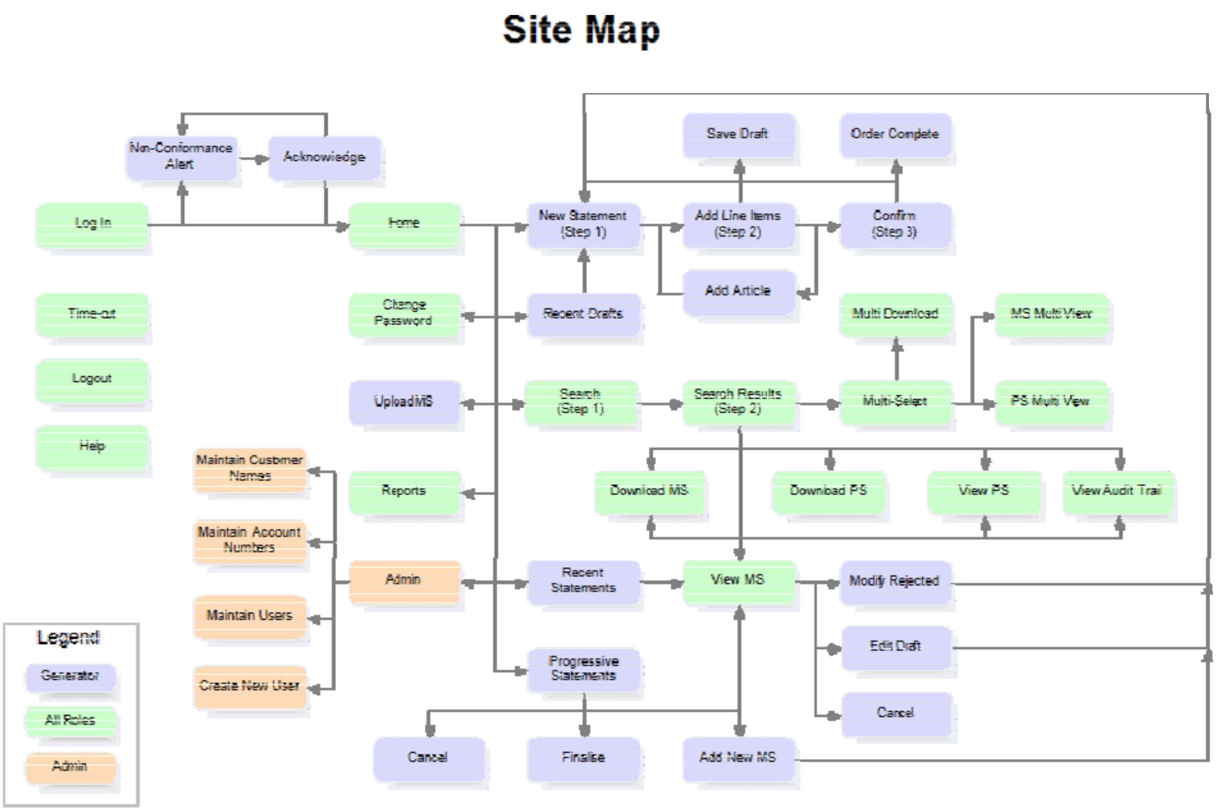
- FAQ
- Site Map

10.2 Frequently Asked Questions

Question	Answer	Relevant to
Who do I call when I need help?	Contact the e-LMS Help Desk on 1800 287 457.	All customers
In V1.7, I used to be able to modify a mailing statement after it was submitted; now I can't. Why?	When a mailing statement is submitted in V2.0, the Australia Post accounts system calculates the pricing and attaches a pricing statement to the mailing statement. Any changes made to the mailing statement would invalidate the pricing. To change a Mailing Statement after it has been submitted, it must first be rejected at the Australia Post Business Centre or Outstation; you can then modify the rejected statement. After you have modified the statement, you must submit it again so that it can be priced, checked and approved.	Mail Generators
Can a customer create user accounts and reset passwords?	Yes. In fact your in-house e-LMS administrator is the only user that is authorised to add and maintain users and reset a user's password.	All customers
When adding a customer charge account, why does the number stay in the Pending Accounts?	If the account number has not been previously recorded in e-LMS, the system performs an overnight update of the database. You should add your customer account numbers at least one day before you want to create statements that use that account.	Administrators
I am logged in as the e-LMS Administrator. How do I gain access to creating mailing statements?	Logout as administrator, and then login again as a mail generator. As administrator, you can create logins for administrators, mail generators and default (read-only) user roles.	Administrators
When logging in, the system will not accept my password.	To type in a valid password, follow this checklist : 1. Before you start typing in the password, ensure that the Caps Lock is turned off on your keyboard. 2. Passwords are case sensitive, so you must type in the password exactly as shown, with uppercase and lowercase letters. For example, to type the password MailGen8, you would press the following keys in sequence: Shift+ M A I L Shift+ G E N 8 3. Passwords cannot be less than 8 characters, or more than 32 characters long.	All users

Question	Answer	Relevant to
	4. When you change your password, you cannot use an old password.	
When working in e-LMS, some of the list boxes and text fields either do not display at all, or do not behave properly.	You are probably using either an unsupported version of Windows, or an unsupported version of Internet Explorer. The application may behave erratically if you are using earlier versions of Windows or Internet Explorer, or if you attempt to access e-LMS from other browsers or operating systems. The minimum configurations are: **Operating system** Microsoft Windows 95, 98, NT4, 2000, XP Home, XP Pro or later **Internet browser** Microsoft Internet Explorer 5.5 (SP1) or later or Mozilla Firefox 1.5 or later	All users
How do I add customers to the list of Originating Customers displayed when I create a new Mailing Statement?	Ask your e-LMS Administrator to add the customer name using the Customer Names function.	Mail Generators
What do I do when a statement has the status of "System Checks Failed" ?	Contact the Australia Post Business Centre where you lodged the mail.	Mail Generators
Can I print or download more than one statement at the same time?	Yes, you can print and download multiple statements. When you search for Mailing Statements, the statements that match your search criteria will be displayed on the Search Results page. Use the checkboxes on the left of the page to select the statements that you want to print or download. **To print the selected statements:** 1. Click **View MS**. 2. Click **printable** (top right of the page). 3. From the **Print** dialog, select your printer and other print options, then click **Print**. **To download the selected statements:** 1. Click **Download MS**. 2. Select CSV or HTML format. 3. From the **Download File** dialog, click **Save**. 4. From the **Save As** dialog, navigate to the folder where the file will be saved, and click **Save**. 5. Close the **Download File** dialog.	All users

10.3 Site Map


Site Map
Non-Conformance Alert
Acknowledge
Log In
Home
Time-out
Logout
Help
Change Password
UploadMS
Reports
Admin
Maintain Customer Names
Maintain Account Numbers
Maintain Users
Create New User
New Statement (Step 1)
Add Line Items (Step 2)
Confirm (Step 3)
Save Draft
Order Complete
Add Article
Recent Drafts
Search (Step 1)
Search Results (Step 2)
Multi-Select
Multi Download
MS Multi View
PS Multi View
Download MS
Download PS
View PS
View Audit Trail
Recent Statements
View MS
Modify Rejected
Edit Draft
Cancel
Progressive Statements
Cancel
Finalise
Add New MS
Legend
Generator
All Roles
Admin

11 e-LMS Contacts

For assistance with using e-LMS:

Please contact the e-LMS Help Desk on 1800 287 457.

For assistance with your account:

Please contact your Australia Post account representative.

For information about joining the Bulk Mail Programme:

Please contact your Australia Post account representative, or call 13 13 18.

Useful links:

Australia Post

e-LMS

12 Copyright Statement

13 Glossary

A

Arrow Keys: Keyboard keys that are used to move the screen cursor up, down, left and right. **Article:** A single letter or parcel.

Audit Trail: A history that is kept for every transaction in e-LMS, which allows customers and Australia Post staff to track the progress of a Mailing Statement and to verify completion of the service.

B

Business Centre: The Australia Post office that supports e-LMS customers and where mail is physically lodged.

C

CDW: Corporate Data Warehouse

Clean Mail: A service provided by Australia Post when lodging bulk mail. The mail must conform to specified conditions and specifications to be eligible for Clean Mail letter prices.

Comops/BI: CDW reporting tool

Contract: An agreement between Australia Post and a customer that sets pricing and general conditions for the provision of mail services.

CTRL: The "Ctrl" or "Control" key on a computer keyboard.

D

Database: A structured system for storing and retrieving information on a computer. **DEL:** The "Delete" key on a computer keyboard.

Download: The electronic process of copying a document from a remote location to the customer's own computer on the internet.

E

e-LMS: An acronym for electronic lodgement of mailing statement.

ENTER: The "Enter" key on a computer keyboard.

EPOS: The counter system used by the Australia Post Retail network for capturing and processing transactions.

ERP: The ERP (Enterprise Resource Planning) system that manages customer accounts and issues invoices.

ESC: The "Esc" or "Escape" key on a computer keyboard.

F

Field: A data entry box on an e-LMS screen.

Full Rate: The contract that is applied for carriage under the ordinary letter service.

H

Hard Disk: The local storage device on a customer's computer where files are located for upload and download.

I

Interactive Account: An account type that allows users to interact with e-LMS via an internet browser.

Internal User: An Australia Post employee or contractor.

Intranet: A collection of computers and networks within an organisation that connects users to a range of computer services, resources and information.

L

Line Item: An entry on a Mailing Statement that details the mail articles for a specified mail service.

Lodgement Point: The location where the mail is physically lodged.

M

Mail Generator: A Mailing House that generates mail on behalf of an Originating Customer.

Mailing House: See Mail Generator.

Mailing Statement: The Australia Post document that a customer submits when sending bulk mail.

MQM: Mail Quality Management system that collects information about Non-conforming Mail.

N

Non-Conforming Mail:

O

Originating Customer: A Mailing House customer.

Outstation: Australia Post staff that work on-site at a Mailing House.

P

PreSort: A lower price rate available to customers that pre-sort their mail.

Pricing Statement: A statement that contains the price charged to the customer for processing the Mailing Statement.

Print Post: A service for authorized periodical publications within Australia.

Q

Quantity: The number of mail articles in a Line Item entry on a Mailing Statement.

R

RAF: The Australia Post system that electronically collects the details of all sales transactions.

S

SHIFT: The "Shift" key on a computer keyboard.

T

TAB: The "Tab" key on a computer keyboard.

TCP/IP: A data communications protocol commonly used for connecting computers to the Internet or an Intranet

U

Upload: The electronic process of copying a document on the customer's own computer to a remote location over the internet.

V

Volume: The total number of items being lodged under a Mailing Statement.

W

Web: A term commonly used to refer to the Internet or the World Wide Web.

X

XML: An electronic file format used to transfer information between computers.