WEB ACCESS:
INTEGRATED ELECTRONIC
COMMERCE – DOCUMENT
MANAGEMENT

W.G.McKay Limited

W.G. MCKAY LIMITED

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W.G. McKay Ltd.

- What we will show you here is part of W. G. McKay's commitment to move forward in new and challenging ways.

- As part of this commitment, the majority of our business is now transacted in a secure 'cloud' environment.

- Cloud applications have a higher level of security protocols, and firewalls.

- Information is fully secured in a data center with secure offsite back-ups.

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Web Access

- Our website is the portal for clients to securely access their commercial import transactions.
- We also have open access for importers and carriers to verify their shipment status based on the cargo control number: (*)
  - Released
  - Setup & pending
  - Holding for Carrier ACI eManifest transmission
  - Redirected for exam
  - (*) Cargo Control Number or Transaction Number required to access this service. Unrestricted 'look-ups' are prohibited.

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Web Access: EDI links & B3 and Invoice data recovery

- Once import records (B3 forms) and invoices are generated, they, and the backup used to account for the shipment, are available for viewing or download (as Portable Document Format (PDF) files)

- Each client has a Secure login with ID and password

- These electronically imaged records meet the conditions as noted in National Standard of Canada CAN/CGSB-72.11-93 Microfilm and Electronic Imaging as Documentary Evidence

- They are maintained on a secure server and are accessible for 7 years.

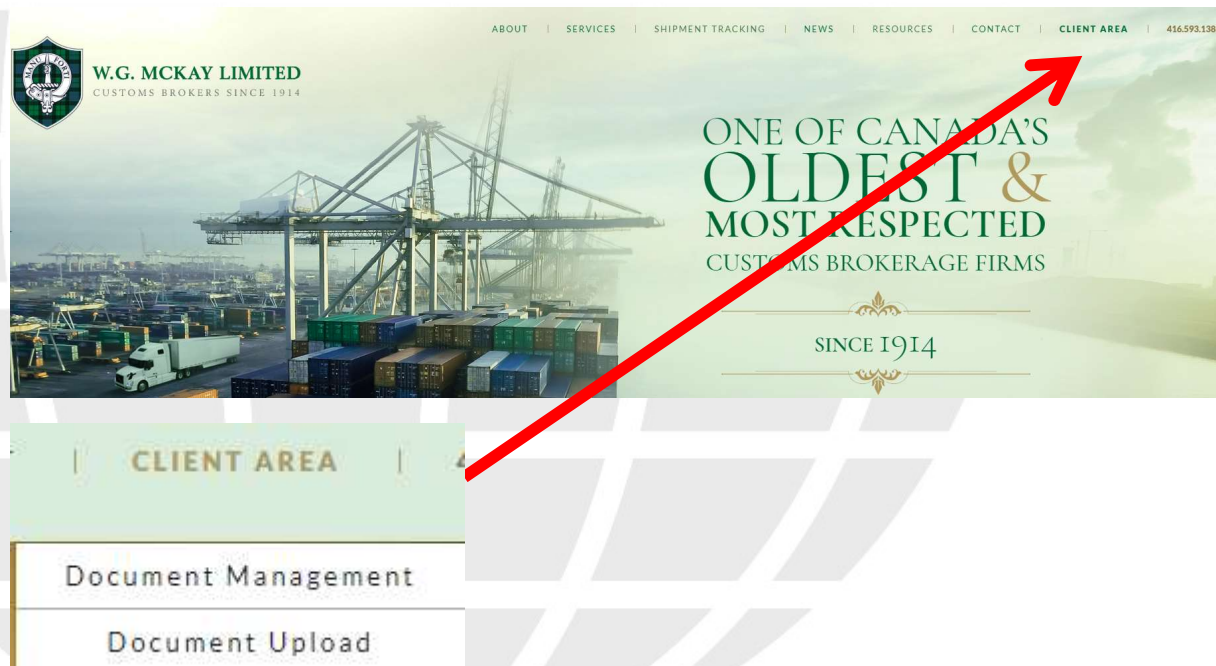**W.G. MCKAY LIMITED**
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- Access is through our website
  - # www.wgmckay.com
    - Please note that our website has been designed to meet WCAG 2.0, Level A standards for accessibility.
    - The website is also 'Mobile – Friendly' for easy access with all devices.
    - NB We have found that access is smoother with Microsoft Edge (Windows 10) and Google Chrome (http://www.google.com/chrome) as we have experienced issues with MS IE 10 and 11

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Access through www.wgmckay.com

CLIENT AREA

Document Management Processes

Document Management Processes

- Contact support@wgmckay.com for Username and Password.
    - Subject Line = Document Management.
- You will receive an email with your login and will be contacted separately with the password.
- Once the system is accessed, you will have the option of scrolling down through files, or searching for specific criteria with a dropdown search menu:

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Document Management Processes

Document Management Processes

- Cargo Control Number   (Carrier's Unique Identifier for shipment)

- Container Number   (Ocean Container or Rail Car)

- File Number   (McKay internal reference)

- Transaction Number   (14 digit bar code)

- Order Number   (Purchase Order shown on documents)

- Release Date Range   (dates the shipments are released from Customs control)

- Invoice Number   (McKay billing)

- Invoice Date Range   (McKay billing)

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Web Access: Document Management

Document Management Processes

- The default display is based on invoices that have not been downloaded.

- **NB once you have downloaded a file it will disappear from the display, but will still be available as a search item**

- Once you have located the files needed, you check the box beside the document you wish to review: (the 'select all' option for each file will select all documents for that file)

- This triggers a download of that document

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Document Management Processes

- B3   (B3 form that corresponds to the Cargo Control Number and Transaction Number)

- CCI   (Document created by the system with the data keyed)

- Invoice (number and date)   (McKay billing)

- In addition, there will be other documents, consisting of scanned copies of original documents received for each shipment (from yourselves, your shippers or carriers)

- Please note that all incoming faxes, company-wide, are sent to email as PDF attachments and are in turn attached to the import record.

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- Once you have chosen the files, the download options are:
  - multiple documents
    (individual pdf files [pages] in a zip file)
  - single document
    (one pdf of multiple pages)

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Document Management Processes

- The downloaded files in pdf format can be stored on CD/DVD or on other media or hard drives.

- This storage complies with CBSA record keeping requirements for imaged documents.

- Once stored in this format, printing is not required, unless you have need of paper copies.

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- **For more information on setting up your Web Access to the Document Management System**
  - **Please contact support@wgmckay.com OR**
  - **Joe Rose**
  - **(jrose@wgmckay.com)**

THANK YOU

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