



OPTrust Secure Portal

File Upload Guide

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Accessing the System

To load a file, log in to your Online Services account and select “File Upload” from the menu on the left:

The screenshot shows the 'onlineServices' dashboard. At the top right, there are links for 'Help', 'Secure Messages', 'Settings', and 'Sign out'. The user is logged in as 'Michelle' with the role 'Air Canada Pilots'. The 'MAIN MENU' on the left includes 'Home', 'Secure Messages', 'File Upload' (highlighted with a red circle and arrow), 'Activity', and 'User Administration'. Below the menu are 'Resources' like 'Pension Terms', 'Tutorials and Videos', and 'Attend an employer information session'. The main content area is titled 'Welcome to Online Services' and lists capabilities: sending/receiving secure messages, sending forms/documents/files, sending payroll data files, and receiving reports from OPTrust. It also features a 'Read the Online Services User Guide' button, 'Employer Manual', 'Employer Update', 'Employer Forms', and a 'Questions?' section with contact information for the Data Management Group.

From here the File Upload screen will open in a new window:

The screenshot shows the 'File Upload' screen. At the top right, it says 'Michelle Employer' with 'Dashboard' and 'Sign out' links. A message at the top reads: 'Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.' Below this is a search bar with 'View:' and 'Or Search From:' dropdowns, and 'To:' and 'Search' buttons. There are 'Export to PDF' and 'Export to EXCEL' buttons. A table with columns 'File ID', 'File Name', 'File Type', 'Created Date', 'User', and 'Notes' is shown, with a 'No items to display' message in the center. At the bottom, there is an 'Information' section with links to 'Employer Manual' and 'File Upload User Guide', and a 'File Upload' section with a dropdown menu and a dashed box for file upload with the text 'Click here to upload or drag and drop a file'.

To begin select the employer you are working on by choosing them from the drop down menu found here:

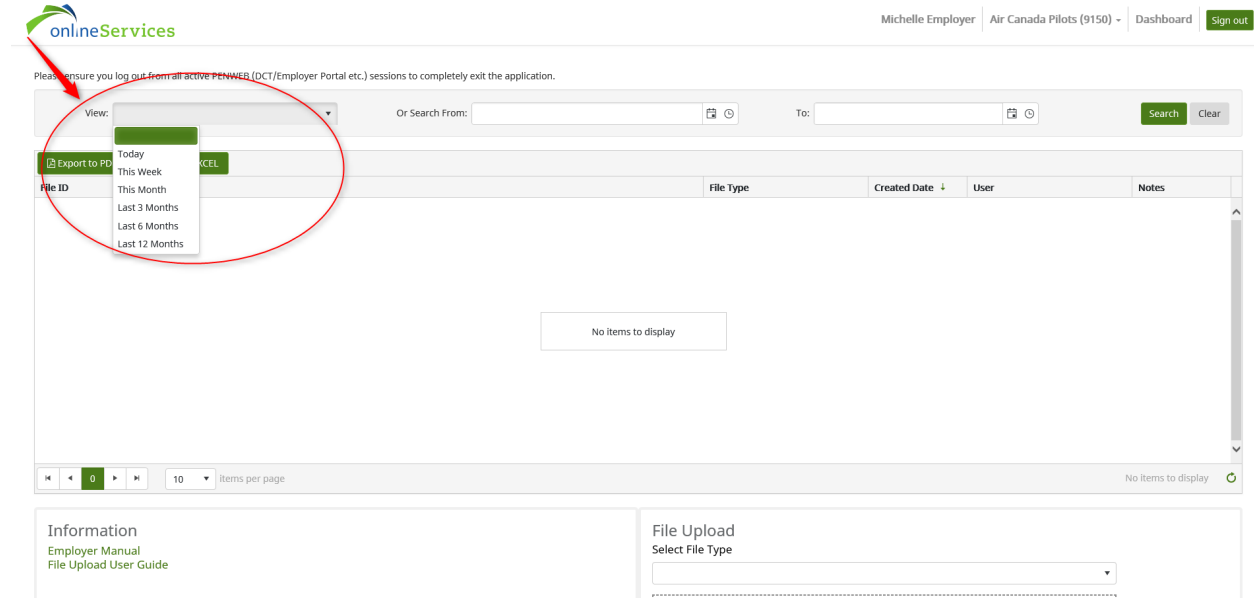
The screenshot shows the 'onlineServices' portal interface. At the top right, the user is logged in as 'Michelle Employee'. A red circle highlights the 'Michelle Employee' dropdown menu, which is open, showing a list of organizations: 'All Organizations', 'Air Canada Pilots (9150)', 'Cabinet Office (54) (54)', and 'Carillion Canada (1047)'. A red arrow points to the 'Air Canada Pilots (9150)' option. Below the dropdown is a search bar with 'View:', 'Or Search From:', and 'To:' fields, and 'Search' and 'Clear' buttons. The main content area contains a table with columns: 'File ID', 'File Name', 'File Type', 'Created Date', 'User', and 'Notes'. The table is empty, displaying 'No items to display'. Below the table are 'Export to PDF' and 'Export to EXCEL' buttons. At the bottom, there is an 'Information' section with links to 'Employer Manual' and 'File Upload User Guide', and a 'File Upload' section with a dropdown to 'Select an organization to upload files.' and a 'Click here to upload or drag and drop a file' link.

You will now see the name of the employer you are working on in this space:

The screenshot shows the 'onlineServices' portal interface after selecting the employer. The user is still logged in as 'Michelle Employee'. The 'Michelle Employee' dropdown menu is now closed, and the selected employer name, 'Air Canada Pilots (9150)', is displayed in the header. A red circle highlights the 'Air Canada Pilots (9150)' text. The rest of the interface, including the search bar, empty table, and 'File Upload' section, remains the same as in the previous screenshot.

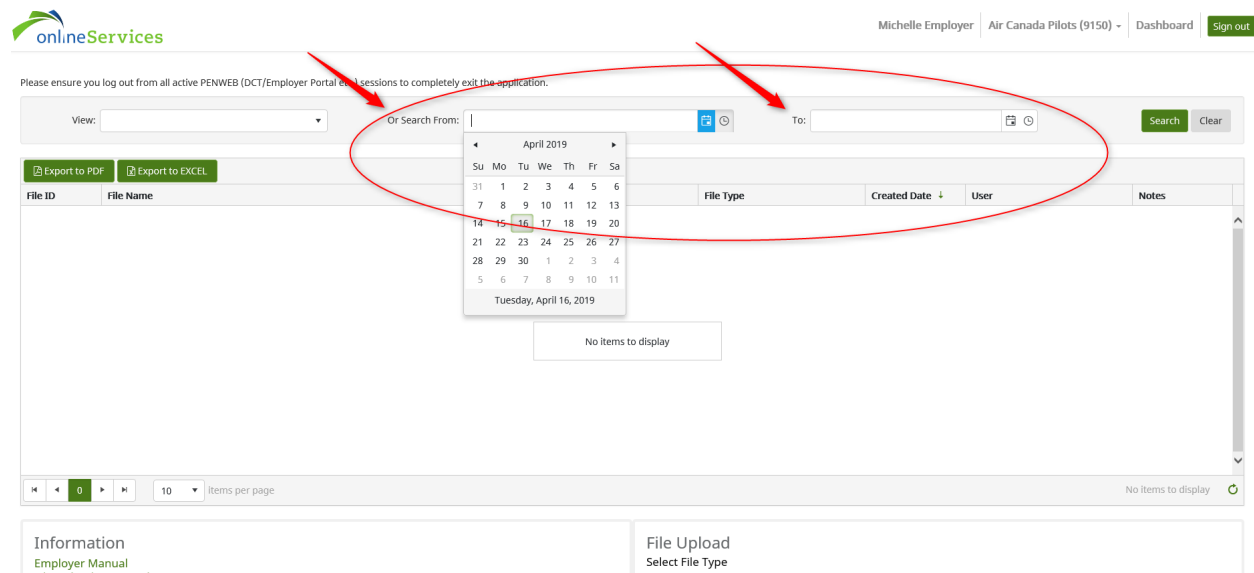
Filtering Files

You can filter the files that you see according to when they were sent (in the “View” drop down):



The screenshot shows the onlineServices portal interface. At the top right, the user is identified as Michelle Employer, Air Canada Pilots (9150), and is on the Dashboard. A 'Sign out' button is visible. Below the header, a message states: "Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application." The main content area features a search bar with fields for "View:", "Or Search From:", and "To:". The "View:" dropdown menu is open, showing options: "Today", "This Week", "This Month", "Last 3 Months", "Last 6 Months", and "Last 12 Months". Below the search bar is a table with columns: "File ID", "File Name", "File Type", "Created Date", "User", and "Notes". The table is currently empty, displaying "No items to display". At the bottom of the table, there are navigation controls showing "0" items per page and "10" items per page. Below the table, there are two sections: "Information" with links for "Employer Manual" and "File Upload User Guide", and "File Upload" with a "Select File Type" dropdown.

Or you can enter a specific time period using the “Search From” and “To” section:



The screenshot shows the onlineServices portal interface. At the top right, the user is identified as Michelle Employer, Air Canada Pilots (9150), and is on the Dashboard. A 'Sign out' button is visible. Below the header, a message states: "Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application." The main content area features a search bar with fields for "View:", "Or Search From:", and "To:". The "Or Search From:" and "To:" fields are highlighted with a red oval. A calendar pop-up is visible over the "Or Search From:" field, showing the month of April 2019. The calendar has a grid with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates. The date "16" is highlighted in green. Below the calendar, it says "Tuesday, April 16, 2019". Below the search bar is a table with columns: "File ID", "File Name", "File Type", "Created Date", "User", and "Notes". The table is currently empty, displaying "No items to display". At the bottom of the table, there are navigation controls showing "0" items per page and "10" items per page. Below the table, there are two sections: "Information" with links for "Employer Manual" and "File Upload User Guide", and "File Upload" with a "Select File Type" dropdown.

Once you enter your parameters click "Search":

onlineServices

Michelle Employer | Air Canada Pilots (9150) | Dashboard | Sign out

Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.

View: [] Or Search From: [] To: [] **Search** Clear

Export to PDF | Export to EXCEL

File ID	File Name	File Type	Created Date	User	Notes
No items to display					

On the bottom of the screen there are links to our Employer Manual:

1 | 10 | Items per page | 1 - 3 of 3 items

Information

- [Employer Manual](#)
- [File Upload User Guide](#)

File Upload

Select File Type

Employer Contribution Data

Click here to upload or drag and drop a file

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And this File Upload Guide:

1 | 10 | Items per page | 1 - 3 of 3 items

Information

- [Employer Manual](#)
- [File Upload User Guide](#)

File Upload

Select File Type

Employer Contribution Data

Click here to upload or drag and drop a file

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Uploading a File

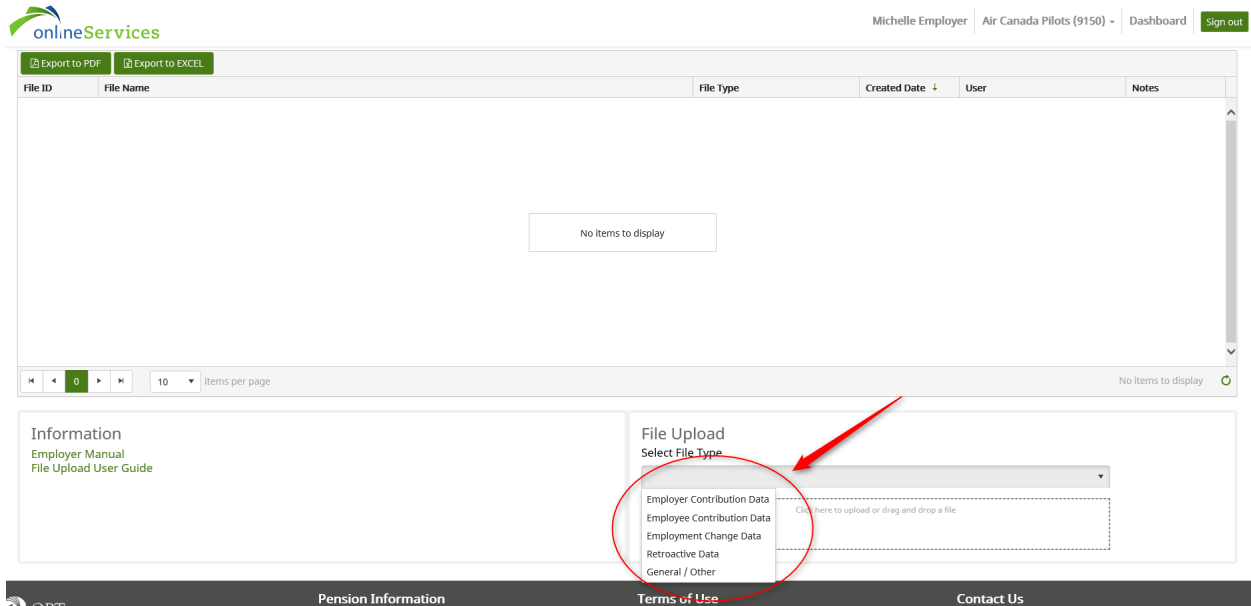
Important: In order to load a file you must select an organization. If you have not done so you will see this and you will not be able to select a type of file:

The screenshot shows the 'onlineServices' interface. At the top right, the user is logged in as 'Michelle Employer' with a 'Dashboard' link and a 'Sign out' button. Below the header, there is a search bar with 'View:', 'Or Search From:', and 'To:' fields, along with 'Search' and 'Clear' buttons. A table with columns 'File ID', 'File Name', 'File Type', 'Created Date', 'User', and 'Notes' is shown, but it is empty with a 'No items to display' message. Below the table, there are 'Export to PDF' and 'Export to EXCEL' buttons. At the bottom, there is an 'Information' section with links to 'Employer Manual' and 'File Upload User Guide'. A red circle highlights the 'File Upload' section, which contains the text 'Select an organization to upload files.' and a dropdown menu. A red arrow points to the dropdown menu.

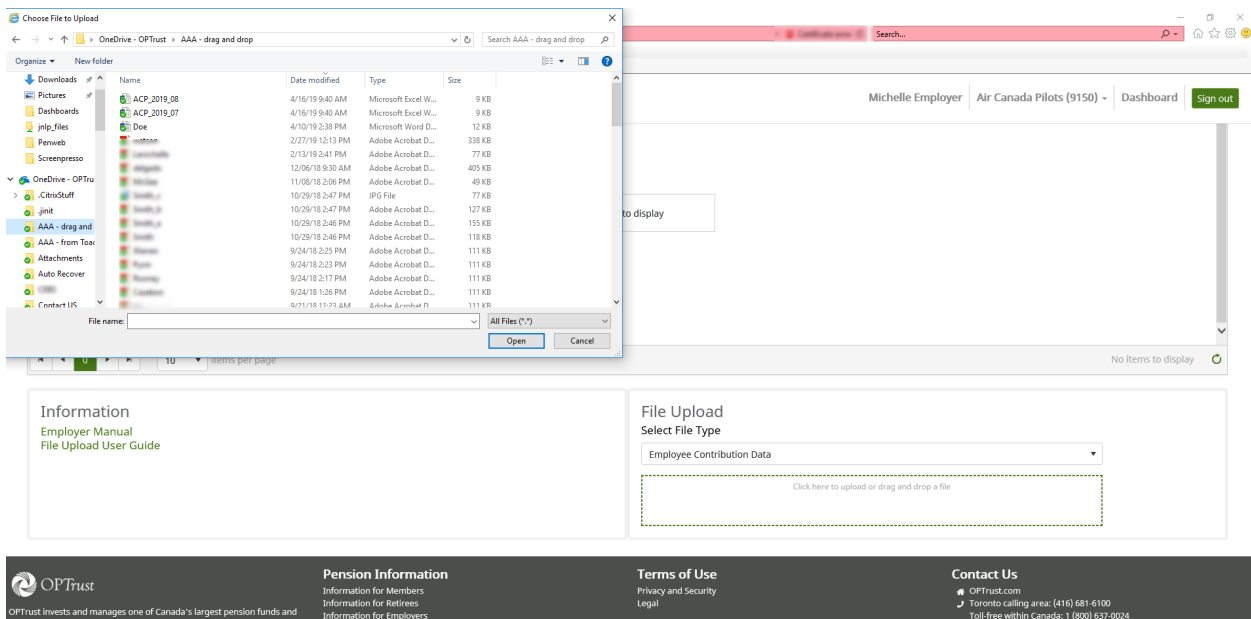
Use the pull down menu at the top of your screen to ensure you have selected the organization you are working on:

This screenshot is similar to the previous one, but it shows the dropdown menu for the organization selection. The dropdown menu is open, showing a search bar and a list of organizations: 'All Organizations', 'Air Canada Pilots (9150)', 'Cabinet Office (54) (54)', and 'Carillon Canada (1047)'. A red circle highlights the dropdown menu, and a red arrow points to the search bar within the dropdown.

To send a file you can use the drop down menu to browse and select the type of file you would like to load:



Once you have selected the file type* you can click into the entry field to bring up a file explorer box. Select the file you would like to upload and click “Open”:



**Note, please see Appendix A for a list of file types supported by the system.*

Once you have selected a file it will appear in the upload window:

onlineServices Michelle Employer Air Canada Pilots (9150) - Dashboard Sign out

No items to display

Information
Employer Manual
File Upload User Guide

File Upload
Select File Type
Employee Contribution Data
ACP_2019_07.xlsx
Upload Cancel

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Information for Members Privacy and Security OPTrust.com

Note: You are only able to upload one file at a time.

Clicking the “Upload” button will send the file and you will be able to see it here:

onlineServices Michelle Employer Air Canada Pilots (9150) - Dashboard Sign out

Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.

View: Or Search From: To: Search Clear

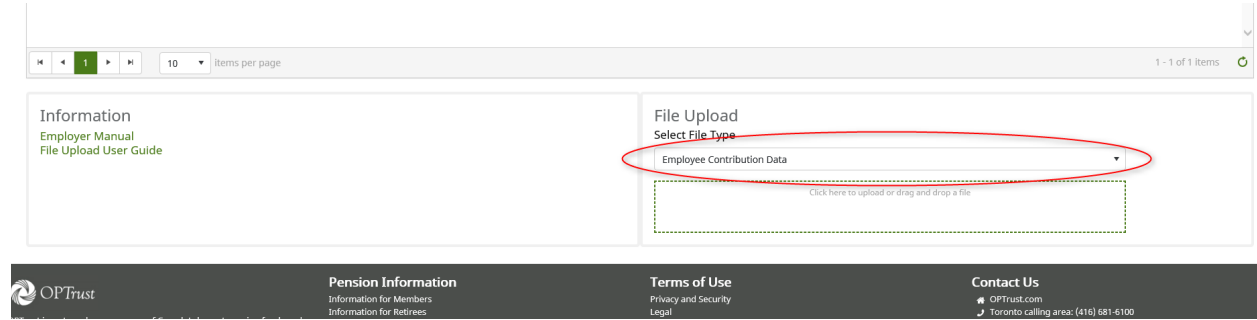
Export to PDF Export to EXCEL

File ID	File Name	File Type	Created Date	User	Notes
95847	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 09:48	michelle@employer.ca	

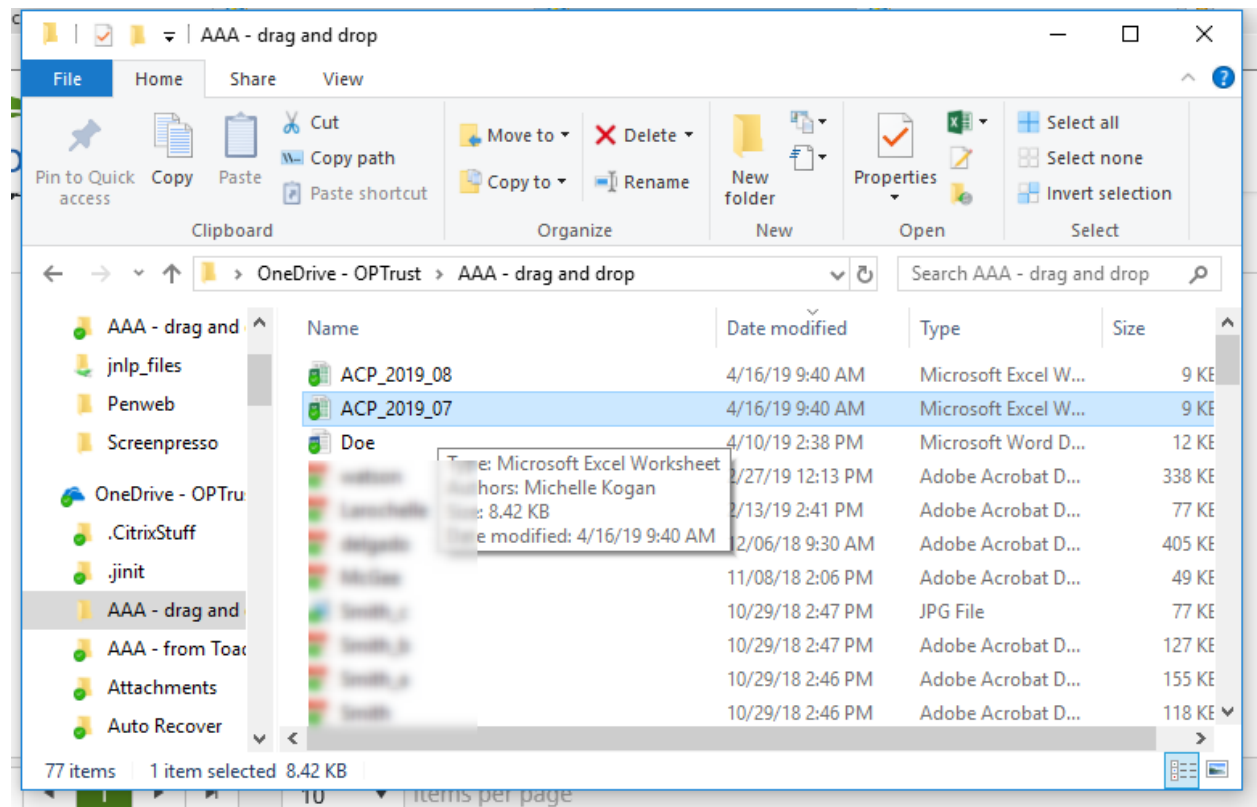
Information
Employer Manual
File Upload User Guide

File Upload
Select File Type
Employee Contribution Data
Click here to upload or drag and drop a file

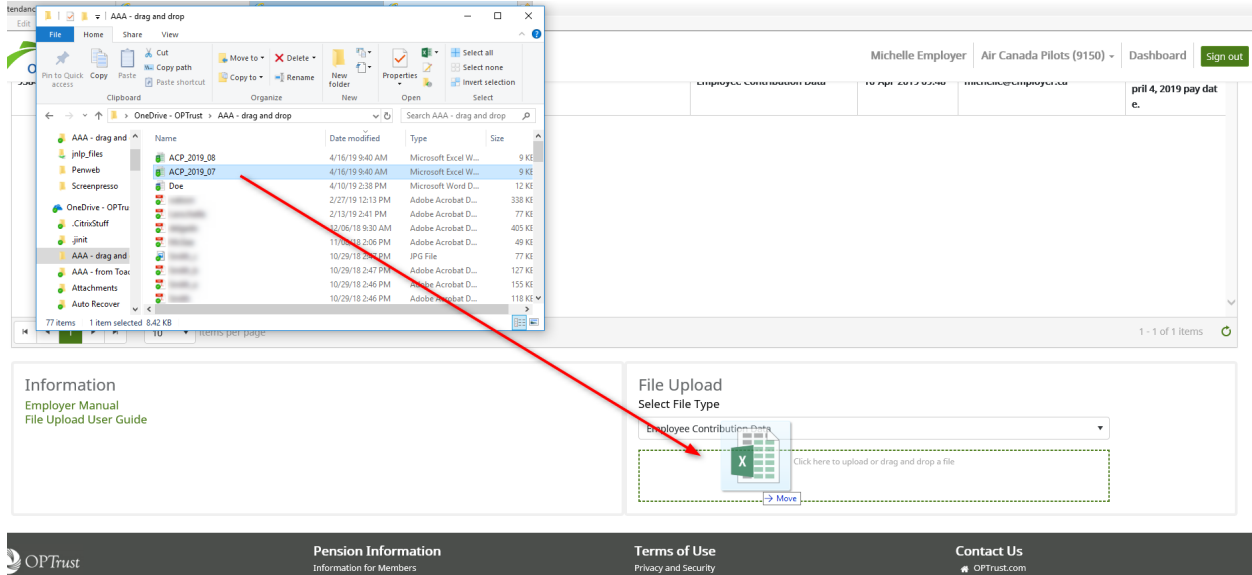
You can also upload a file by “dragging and dropping” it. To do so again, select the file type you would like to upload:



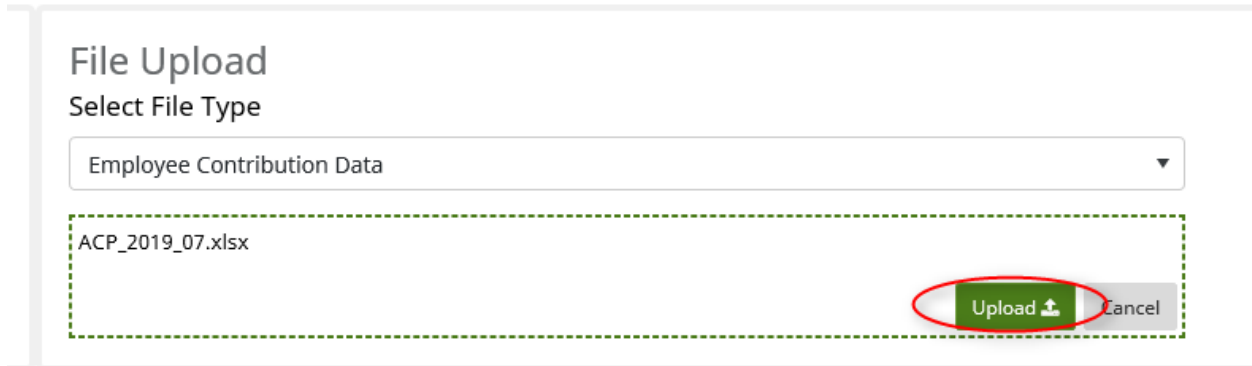
From your file explorer select the file you would like to upload and click on it once to hold it:



Holding down the left hand mouse button, drag your file in to the file upload area and release the mouse button:



Your file will now appear in the upload box, clicking “Upload” will transmit the file:



Once a file is uploaded it can't be removed. If you do upload a file in error you can enter a note asking for it to be disregarded (instructions for adding notes follow):

The screenshot shows the 'onlineServices' portal interface. At the top, there is a navigation bar with 'Michelle Employer', 'Air Canada Pilots (9150)', 'Dashboard', and a 'Sign out' button. Below the navigation bar, a message reads: 'Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.' The main content area features a search bar with 'View:', 'Or Search From:', and 'To:' fields, along with 'Search' and 'Clear' buttons. Below the search bar, there are three buttons: 'Export to PDF', 'Export to EXCEL', and 'Edit Notes'. A table displays the following data:

File ID	File Name	File Type	Created Date	User	Notes
95848	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 10:07	michelle@employer.ca	Please disregard this file.
95847	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 09:48	michelle@employer.ca	Hi, Here is the employee file for the April 4, 2019 pay date.

A red arrow points to the 'Notes' column for the first file, and a red circle highlights the text 'Please disregard this file.' in the 'Notes' cell.

Adding Notes

Clicking on the file enables an "Add Notes" button:

The screenshot shows the 'onlineServices' portal interface. At the top, there is a navigation bar with 'Michelle Employer', 'Air Canada Pilots (9150)', 'Dashboard', and a 'Sign out' button. Below the navigation bar, a message reads: 'Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.' The main content area features a search bar with 'View:', 'Or Search From:', and 'To:' fields, along with 'Search' and 'Clear' buttons. Below the search bar, there are three buttons: 'Export to PDF', 'Export to EXCEL', and 'Add Notes'. A table displays the following data:

File ID	File Name	File Type	Created Date	User	Notes
95847	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 09:48	michelle@employer.ca	

A red arrow points to the 'Add Notes' button, which is circled in red.

Clicking on it will bring up this box:

The screenshot shows a dialog box titled 'Add Notes - 95847'. The dialog box has a close button (X) in the top right corner. It displays the following information:

File Name ACP_2019_07.xlsx

Below the file name, there is a large empty text area for entering notes. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Save'.

Enter your note, click save and your note will appear here:

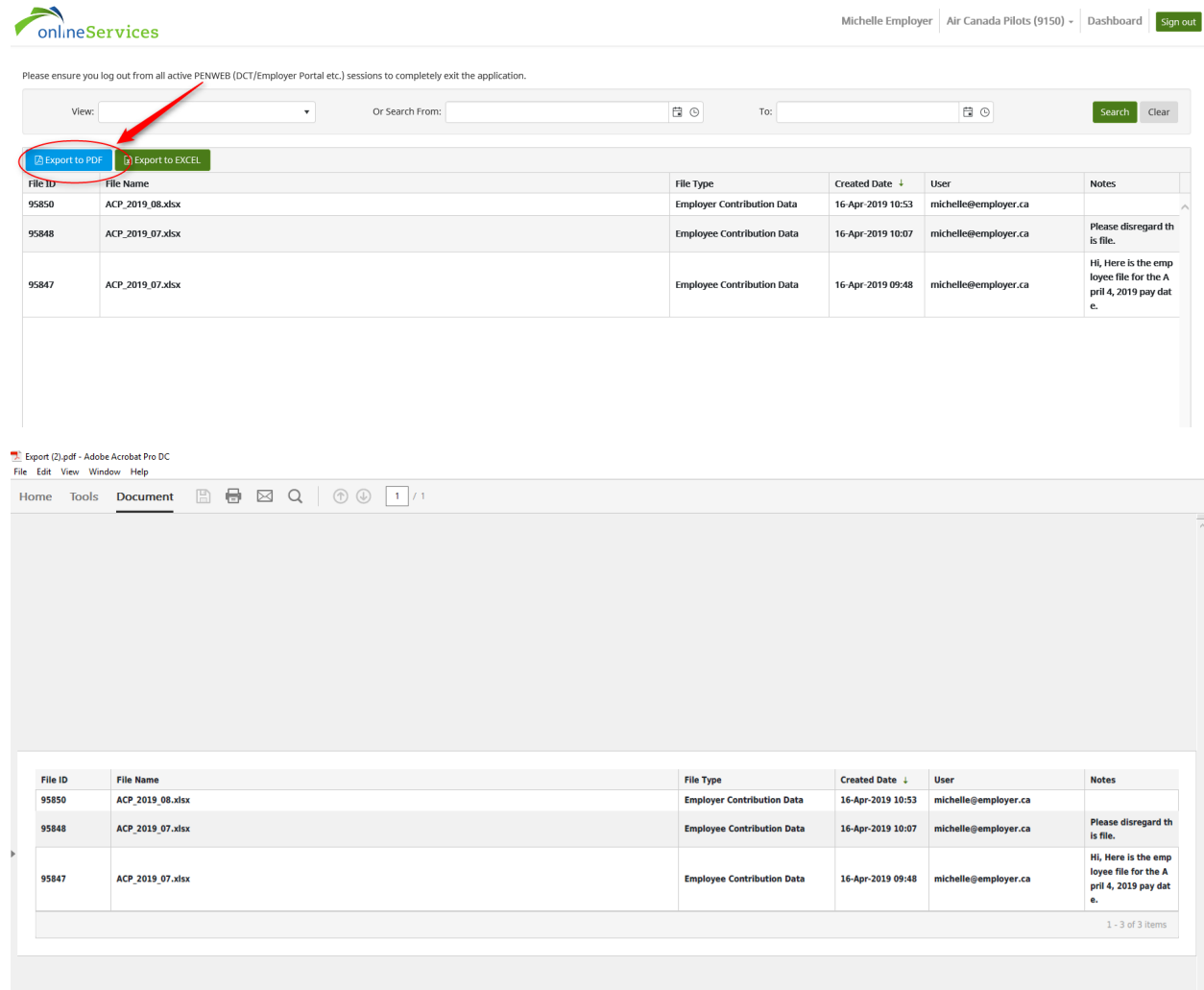
The screenshot shows the 'onlineServices' portal interface. At the top right, the user is identified as 'Michelle Employer' for 'Air Canada Pilots (9150)'. Below the header, there is a search bar with 'View:', 'Or Search From:', and 'To:' fields, along with 'Search' and 'Clear' buttons. A row of action buttons includes 'Export to PDF', 'Export to EXCEL', and 'Edit Notes'. The main table has columns for 'File ID', 'File Name', 'File Type', 'Created Date', 'User', and 'Notes'. A single row is visible with File ID '95847', File Name 'ACP_2019_07.xlsx', File Type 'Employee Contribution Data', Created Date '16-Apr-2019 09:48', and User 'michelle@employer.ca'. The 'Notes' column for this row contains the text 'Hi, Here is the employee file for the April 4, 2019 pay date.' and is circled in red. A red arrow points from the 'Edit Notes' button to this note field.

You can edit your note as well if need be by clicking "Edit Notes":

This screenshot shows the same portal interface as the first image. The 'Edit Notes' button in the action bar is circled in red. An 'Edit Notes - 95847' dialog box is open in the foreground. The dialog box contains the following information: 'File Name: ACP_2019_07.xlsx' and a text area with the note 'Hi, Here is the employee file for the April 4, 2019 pay date.'. At the bottom of the dialog box are 'Cancel' and 'Save' buttons.

Exporting Logs

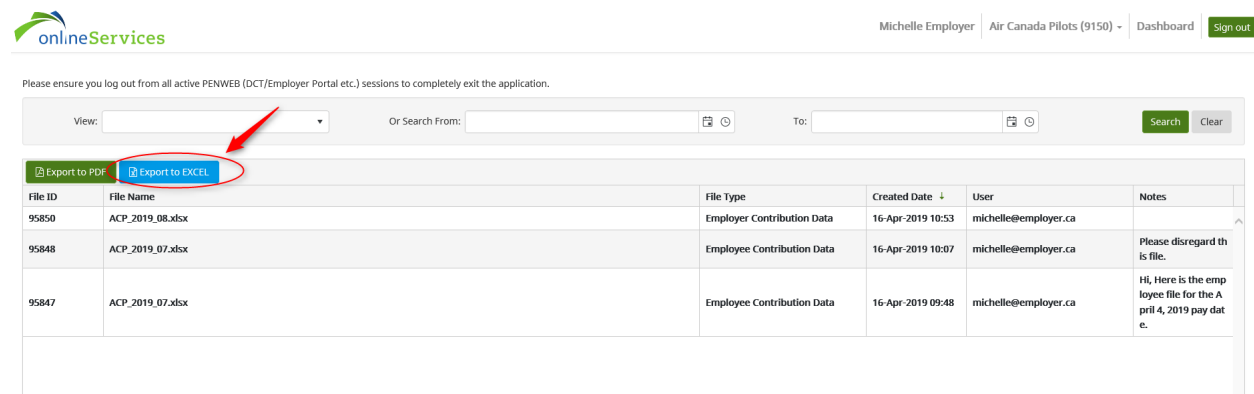
Clicking “Export to PDF” exports a log of your files to a pdf:



The screenshot shows the onlineServices portal interface. At the top, there is a navigation bar with the logo, user name 'Michelle Employer', and location 'Air Canada Pilots (9150)'. Below the navigation bar, there is a search and filter section with 'View:' and 'Or Search From:' dropdowns, and a 'To:' field. The main content area contains a table with columns: File ID, File Name, File Type, Created Date, User, and Notes. The table lists three files: 95850 (ACP_2019_08.xlsx), 95848 (ACP_2019_07.xlsx), and 95847 (ACP_2019_07.xlsx). Below the table, there are two buttons: 'Export to PDF' (highlighted with a red circle and arrow) and 'Export to EXCEL'. Below the portal screenshot, there is a screenshot of a PDF viewer window titled 'Export (2).pdf - Adobe Acrobat Pro DC'. The viewer shows the same table data as the portal, indicating that the 'Export to PDF' button successfully exports the log data to a PDF file.

File ID	File Name	File Type	Created Date	User	Notes
95850	ACP_2019_08.xlsx	Employer Contribution Data	16-Apr-2019 10:53	michelle@employer.ca	
95848	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 10:07	michelle@employer.ca	Please disregard this file.
95847	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 09:48	michelle@employer.ca	Hi, Here is the employee file for the April 4, 2019 pay date.

Clicking “Export to EXCEL” downloads a log of your file to Excel:



The screenshot shows the onlineServices portal interface, similar to the previous one. The 'Export to EXCEL' button is highlighted with a red circle and arrow. The table below it contains the same data as the previous screenshot.

File ID	File Name	File Type	Created Date	User	Notes
95850	ACP_2019_08.xlsx	Employer Contribution Data	16-Apr-2019 10:53	michelle@employer.ca	
95848	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 10:07	michelle@employer.ca	Please disregard this file.
95847	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 09:48	michelle@employer.ca	Hi, Here is the employee file for the April 4, 2019 pay date.

AutoSave Export (2) - Excel

File Home Insert Page Layout Formulas Data Review View Developer Help Tell me what you want to do

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Increase/Decrease


Conditional Formatting: Check Cell, Explanatory..., Input, Linked Cell

Styles: Normal, Bad, Good, Neutral

File ID	File Name	File Type	Created Date	User	Notes
95850	ACP_2019_08.xlsx	EMER_CONTRI	16-Apr-2019 10:53	michelle@employer.ca	
95848	ACP_2019_07.xlsx	EMEE_CONTRI	16-Apr-2019 10:07	michelle@employer.ca	Please disregard this file.
95847	ACP_2019_07.xlsx	EMEE_CONTRI	16-Apr-2019 09:48	michelle@employer.ca	Hi, Here is the employee file for the April 4, 2019 pay date.

Uploaded Files

Once a file has been uploaded by OPTrust it will appear with the File ID struck out as follows:

 Michelle Employer | Dashboard | [Sign out](#)

Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.

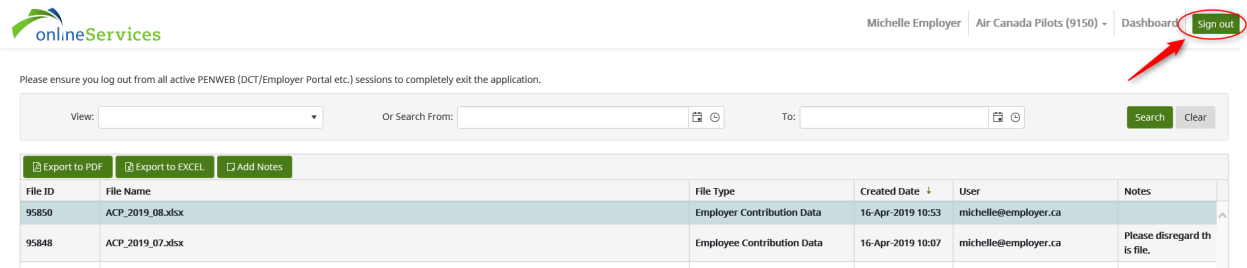
View: Or Search From: To: [Search](#) [Clear](#)

[Export to PDF](#) [Export to EXCEL](#) [Add Notes](#)

File ID	File Name	File Type	Created Date	User	Notes
95850	ACP_2019_08.xlsx	Employer Contribution Data	16-Apr-2019 10:53	michelle@employer.ca	
95848	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 10:07	michelle@employer.ca	Please disregard this file.
95847	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 09:48	michelle@employer.ca	Hi, Here is the employee file for the April 4, 2019 pay date.

Signing Out

To log out once you are done click “Sign out”:



The screenshot shows the onlineServices portal interface. At the top left is the logo. At the top right, the user is identified as 'Michelle Employer' with a dropdown menu showing 'Air Canada Pilots (9150)' and 'Dashboard'. A 'Sign out' button is circled in red with a red arrow pointing to it. Below the header, a message reads: 'Please ensure you log out from all active PENWEB (DCT/Employer Portal etc.) sessions to completely exit the application.' Below this is a search bar with 'View:' and 'Or Search From:' dropdowns, and 'To:' and 'Search' buttons. Below the search bar are three buttons: 'Export to PDF', 'Export to EXCEL', and 'Add Notes'. Below these buttons is a table with the following data:

File ID	File Name	File Type	Created Date	User	Notes
95850	ACP_2019_08.xlsx	Employer Contribution Data	16-Apr-2019 10:53	michelle@employer.ca	
95848	ACP_2019_07.xlsx	Employee Contribution Data	16-Apr-2019 10:07	michelle@employer.ca	Please disregard this file.

Please remember, for security reasons it is extremely important to sign out once you are done.

Important note: Signing out of File Upload will NOT sign you out of the OPTrust Secure Portal, you must do this separately.

Appendix A

Program	Extension
Word (legacy)	.doc
Word	.docx
Excel (legacy)	.xls
Excel	.xlsx
PowerPoint (legacy)	.ppt
PowerPoint	.pptx
Data Files & Text	.csv
Data Files & Text	.txt
Data Files & Text	.rft
Picture Files	.bmp
Picture Files	.jpg
Picture Files	.jpeg
Picture Files	.tif
Picture Files	.tiff
Picture Files	.gif
Picture Files	.png
Group / Compression	.zip
Web	.html
Document	.pdf
Log File	.log
XML File	.xml
Web	.htm