



FACTS™

FISHING ACTIVITY & CATCH TRACKING SYSTEM

www.fisheryfacts.com

User Guide

for Michigan

Wholesale Users

Produced By

electricedge
Systems Group Inc.

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KEY FEATURES OF FACTS™

FACTS™ provides the data management tools needed to make sustainable fisheries a practical reality. Fishing Activity and Catch Tracking System (FACTS™) is a set of fishery data collection and management software modules for those who are accountable for collecting and reporting fishing activity, catch data in a fishery, and fishery product purchases. As a Wholesaler in Michigan you will quickly discover the benefits of the key features listed below.



More efficient

Alternative to paper reporting that you submit. FACTS™ can be customized with your preferences in mind, you no longer need to hand write your transactions for every purchase, FACTS™ can have your preferences auto-fill for you.



Real-time Data Collection and reporting - FACTS™ can be used anywhere!

Submit your transactions details on shore or on the water (via Desktop or Mobile)– as soon as data is received it is available and can be viewed in reports.



User Friendly

FACTS™ has been designed with YOU the wholesaler in mind! The system is functional, yet simplistic and intuitive to use.

NEED HELP?

For any issues while reporting, have a question or concern, or would like to provide feedback on the system or process, please contact Corporal Jon Busken at Buskenj1@michigan.gov or 906-203-8586.

MANAGING YOUR USER ACCOUNT

“My Account” is where you can view your account details and keep them up to date.

Tasks you can perform include:

- Change your **Account Details** (Username, Password, security question). See Figure 2 below “Wholesale Account Details”.
- Change your **Business Account Details** (Name, phone number, mailing and physical address, phone and web contact). See Figure 3 below “Wholesale Business Details”.

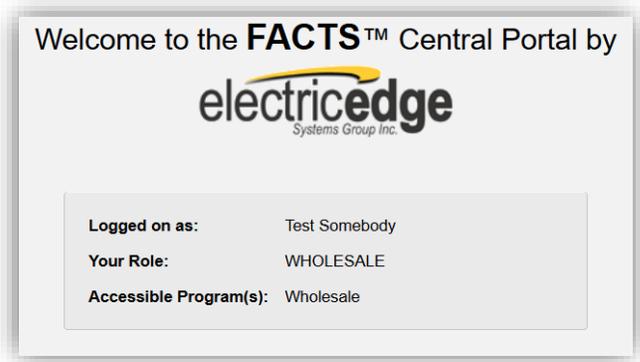


Figure 1 User Home Screen

The screenshot shows the "Account Details" form. It includes fields for Username (TestFeb16-2), Password (masked with asterisks and a "Change" button), Password Question (What is your favorite color?), Password Answer (Something), Role (Wholesale), Program (Wholesale), and Reporting (Enabled).

Figure 2 Wholesale Account Details

The screenshot shows the "Business Details" form. It includes fields for Business Name (Electric Edge), Contact Name (Test), Middle Name, Suffix, Mailing Address (1111 Somewhere), Physical Address (with a "Same as mailing address" checkbox), City, State (Alabama), Zip (36029), County (Alabama), and ED District.

Figure 3 Wholesale Business Details

- View your **License Details** (license number, active date and expiration date). See Figure 4 “Wholesale Licenses”.
- Change your **Preferences**. See Figure 5 “Wholesale Preferences”.
- **How many recent sellers to use?**

The screenshot shows the "License" details. It includes License Number: 1989, Active Date: Jan 01, 2018, and Expiration Date: Dec 31, 2018.

Figure 4 Wholesale License

When entering purchase records, you are given an option to select from a Recent Sellers list. This preference lets you set how many of your recent sellers* you'd like displayed to select from. This list is ranked by the number of purchases made from each past seller (most used is at the top) and if the number of transactions is the same across several of your sellers, then those sellers will be listed alphabetically.

The screenshot shows the "Preferences" form. It includes a field for "How many recent sellers to use?:" with the value 22.

Figure 5 Wholesale Preferences

*recent sellers are based on transactions available in this new system, it does not include transactions from the old wholesale fish dealer system.

To manage your account settings or preferences, please go to our desktop website at <https://michigan.fisheryfacts.com> and login using your Username and Password. Once logged in, click on “My Account” (located in the upper right corner of the screen).

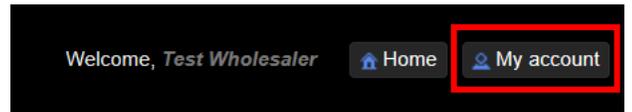


Figure 6 My Account

Note: the desktop website is they only way to manage your account.

Account Password Retrieval Process

If you forgot your password, FACTS™ can retrieve it for you.

To retrieve your password in FACTS™:

- 1) Navigate to FACTS™ user login screen
- 2) Select **“Forgot your password?”** See Figure 7 “Forgot your password”.
- 3) Enter in your **username** and select **“Next”**.
- 4) Answer your security question and select **“Retrieve Password”**. FACTS™ will generate a success screen with your account password.



Figure 7 Forgot your password

REPORTING OPTIONS

There are two different platforms to report your transactions using FACTS™. FACTS™ Desktop has been designed for laptop and desktop computers while FACTS™ mobile site has been designed for smartphones and tablets.

Desktop Website

<https://michigan.fisheryfacts.com>

The functions and features include:

- Recording your purchase transactions in real-time or as you see fit throughout each month
- Review you purchase transaction history and download the history data that will open in Microsoft Excel or any standard electronic spreadsheet program.
- Manage your user account
- Conduct your required monthly reporting submission which includes correcting, adding, or deleting transactions as needed prior to certifying your monthly report.
- Set future monthly reporting status

Mobile Website

<https://michigan.fisheryfacts.com/mobile>

Mobile Site Functionality

- Recording your purchase transactions in real-time or as you see fit throughout each month
- Review your purchase transaction history for the current month



Figure 8 FACTS User Log in Screen

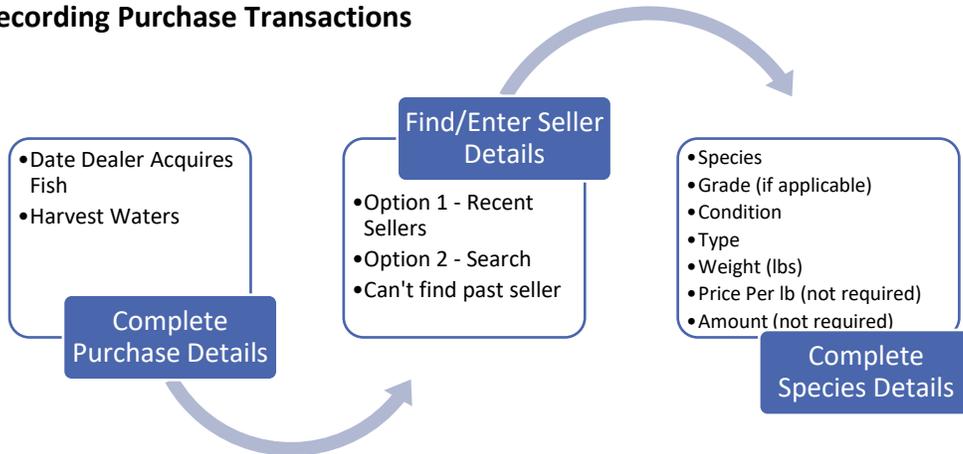


Figure 9 Mobile Site User Log in Screen

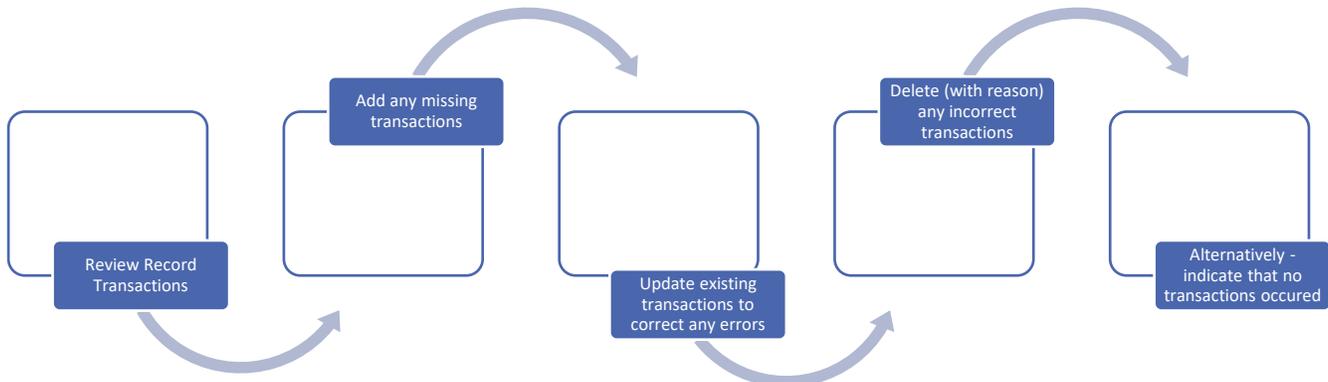
ELECTRONIC REPORTING PROCESS

The Electronic Reporting Process includes 3 overarching steps: **Recording Purchase Transactions, Month End Review and Finalization, and Report Certification**. Below you will find the flow of each overarching step and how they all work together to submit your final month end report to the DNR.

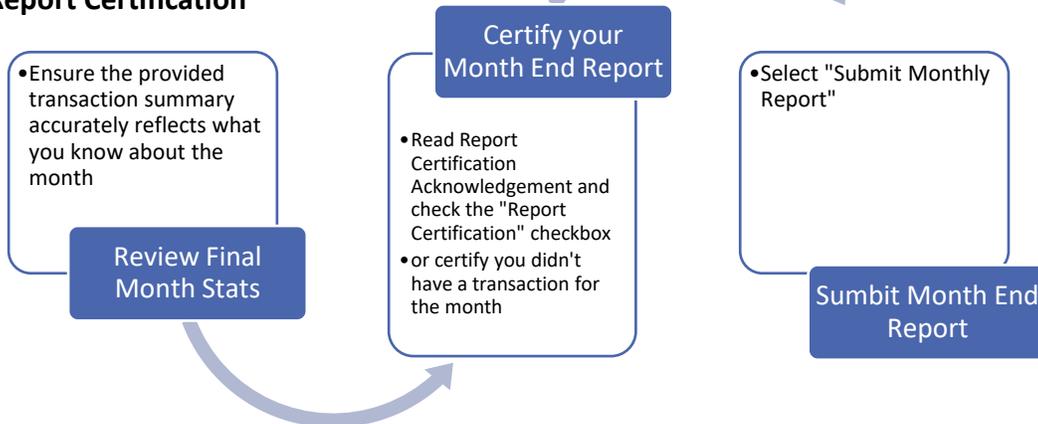
Step #1 – Recording Purchase Transactions



Step #2 – Complete Month End Review and Finalization



Step #3 – Report Certification



HOW TO RECORD A PURCHASE TRANSACTION

Using the FACTS™ Desktop Website

- 1) **Login** to desktop website: <https://michigan.fisheryfacts.com>.
- 2) Select **Purchase** from the top menu
- 3) Select **New Transaction**
- 4) Fill in all required fields

a. Purchase Details (see Figure 10 “Record Purchase Details”)

- Date Dealer Acquires fish
- Harvest Waters

b. Seller Details (see Figure 11 “Find Past Sellers”)

- Find your seller details via Option #1, Option #2 or manually entering details after checking the “Can’t find past seller” checkbox.

c. Species Details (see Figure 12 “Species Details”)

- Species
- Grade (if applicable)
- Condition
- Type
- Weight
- Price Per lb (not required)
- Amount (not required)

- 5) Select **Save Wholesale Purchase Record**

Purchase Details

Purchaser: Test Somebody

Date Dealer Acquires Fish:

Harvest Waters: -- Select --

Figure 10 Record Purchase Details

Find Past Sellers

Option 1 - Recent Sellers

How many recent sellers to display?:

Select Seller

Option 2 - Search

Business Name:

License Category: -- Select --

License Number:

Search

Can't find past seller

Seller Details

[Instructions](#)
Use Option 1 or Option 2 above to find an existing seller, or check the box labeled "Can't find past seller" to enter details for a new seller.

Figure 11 Find Past Sellers

Species Details

Vessels:

| Species | Grade | Condition | Type | Weight (lbs) | Price Per lb | Amount |
|------------|-------|-----------|------|--------------|--------------|--------|
| No species | | | | | | |

Figure 12 Species Details

Note: Selecting a seller can be done one of three ways.

Option 1 - Recent Seller: This is a simple select box where you can select from a list of recent sellers that you’ve used. This list is ranked by the number of purchases made from each past seller (most purchases at the top of the list) and if the number of transactions is the same across several of your sellers, then those sellers will be listed

alphabetically. Once selected, click "Use Selected Seller" and the section will be filled in with the selected seller's details already on file.

Option 2 - Search: Here you can search by any of the 3 prompts (4 if you have indicated a Tribal License Category). When you press search, you will see the results below (see below in Figure 13). In the search results you can page through the results and press the "Select" button for the seller you are currently purchasing from. That will close the search results and the details for the selected seller will be displayed in the "Seller Details" section.

Option 2 - Search

Business Name:

License Category: Tribal

License Type: Bed River Tribal Community

License Number:

| Seller Name | Seller's License Number | License Category | Address | State/Province | City | Zip/Postal Code | Action |
|------------------|-------------------------|------------------|---------------------|------------------|-------------|-----------------|---------------------------------------|
| DAY, DENNIS | BR168 | Tribal | | DAY, DENNIS | BLACK RIVER | 48721 | <input type="button" value="Select"/> |
| JOHNSTON, JUSTIN | BR190 | Tribal | | JOHNSTON, JUSTIN | BAYFIELD | 54814 | <input type="button" value="Select"/> |
| MILLIGAN, JEREMY | BR194 | Tribal | | MILLIGAN, JEREMY | BAYFIELD | 54814 | <input type="button" value="Select"/> |
| NEWAGO SR., JOE | BR89 | Tribal | ROUTE 1 | NEWAGO SR., JOE | CHASSELL | 49916 | <input type="button" value="Select"/> |
| NEWAGO, JAYKOB | BR199 | Tribal | | NEWAGO, JAYKOB | BAYFIELD | 99999 | <input type="button" value="Select"/> |
| NEWAGO, JOE JR | BR9 | Tribal | 32460 ST HWY B | NEWAGO, JOE JR | BAYFIELD | 54814 | <input type="button" value="Select"/> |
| NEWAGO, STEVE | BR88 | Tribal | 32298 MCCULLOCH RD. | NEWAGO, STEVE | WASHBURN | 54891 | <input type="button" value="Select"/> |

Figure 13 Search Results for Tribal License Category

Can't find past seller: If you can't find a past seller with either searching or using your past sellers list, you can check this box which alters the seller details section. You now can fill in the seller details.

Can't find past seller

Seller Details

Instructions
Use Option 1 or Option 2 above to find an existing seller, or check the box labeled "Can't find past seller" to enter details for a new seller.

State/Province: -- Select --

Name:

Address:

City:

Zip/Postal:

License Category: -- Select --

Figure 14 Can't find past seller

Using the FACTS™ Mobile Website

- 1) **Login** to mobile site:
<https://michigan.fisheryfacts.com/mobile>
- 2) Select **“New Transaction”**
- 3) Fill in all required fields.
 - a. **Purchase Details**
 - Date Dealer Acquires fish
 - Harvest Waters
 - b. **Seller Details**
 - Find your seller details via Option #1, Option #2 or manually entering details by selecting **“Can’t find past seller”** checkbox.
 - c. **Species Details**
 - Species
 - Grade (if applicable)
 - Condition
 - Weight
 - Type
 - Price Per lb (not required)
 - Amount (not required)
- 4) Select **“Save Wholesale Purchase Record”**

Note: Searching for a seller can be done one of three ways.

Option 1 - Recent Seller: This is a simple select box where you can select from a list of past sellers that you’ve used. This list is ranked by the number of purchases from each past seller and if the number of transactions is the same across several of your sellers, then those sellers will be listed alphabetically. Once selected, the "Seller Details" section will be filled in.

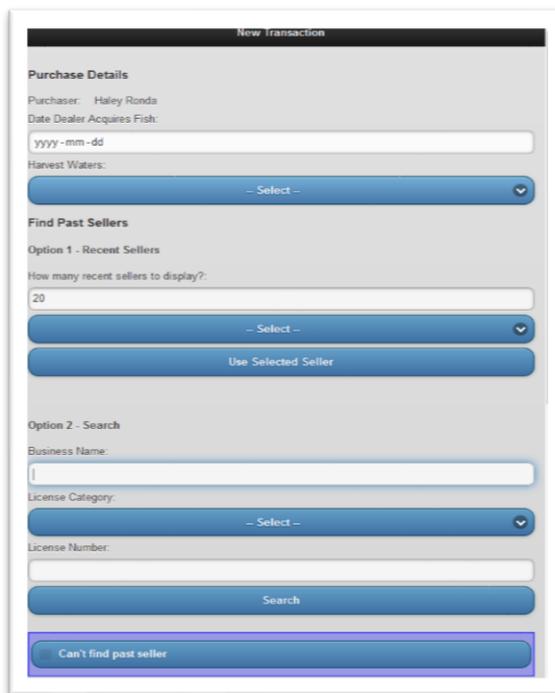


Figure 15 Mobile New Transaction

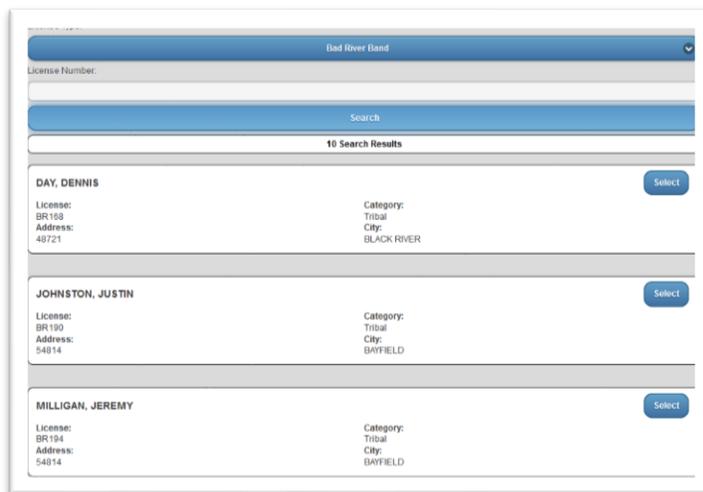


Figure 16 Mobile Seller Search

Option 2 - Search: Here you can search by any of the 3 prompts (4 if you have indicated a Tribal License Category). When you press search, you will see the results to the right (see Figure 16 “Mobile Seller Search”). In search results you can scroll through the results. Press the "Select" button for the seller you are currently purchasing from. That will close the search results and the details for the selected seller will be displayed in the "Seller Details" section.

Can't find past seller: If you can't find a seller with either searching or using your past sellers list, you can check this box which alters the seller details section. You now can fill in the seller details.



Figure 17 Mobile Can't find past seller

HOW TO ACCESS YOUR PURCHASE RECORDS

Using FACTS™ Desktop Website

By accessing <https://michigan.fisheryfacts.com> on a computer via your username and password, you will be able to view past purchases in “My Transactions”.

To view past transactions and purchase details for each of your transactions:

- 1) Click on the **Purchases** menu tab in the top left corner of the page and select “**My Transactions**” from the drop-down menu.
- 2) To return all previously entered transactions, click “Search”. To narrow down your search results select a **specific date range, species, transaction number, seller name, &/or seller type** and then click “**Search**”. All fields are optional based on the data that you are looking for. After generating the search results, your transaction summary will be displayed below the search criteria fields. Transactions will be arranged in order by transaction date with the most recent transactions at the top.

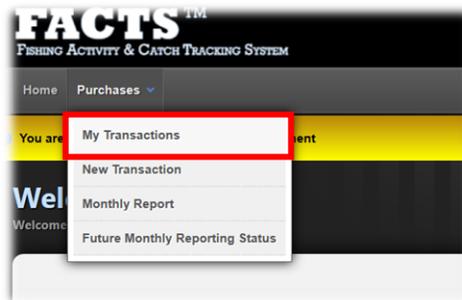


Figure 18 How to view your transactions

Note: After search results return you will be able to download and save a copy of your transaction summary as a CSV spreadsheet file by selecting the “**Download Results**” button.

- 3) To view the details of a particular purchase, click on the **view/edit** button in the “**Action**” column of the table.

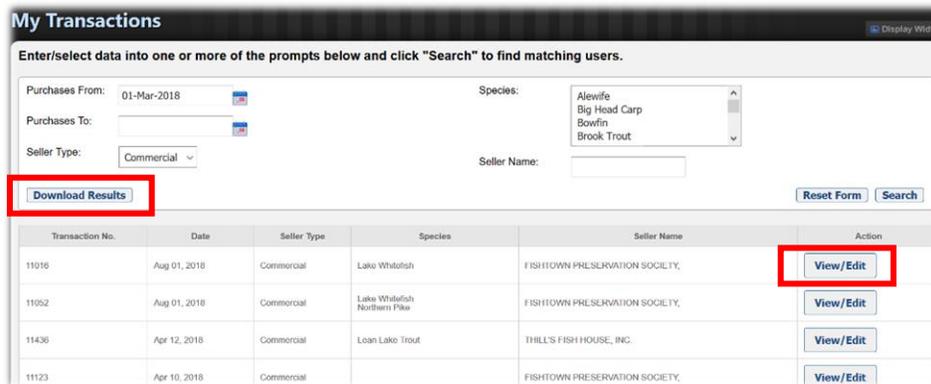


Figure 19 How to search and view/edit your transactions

Using FACTS™ Mobile Website

By accessing <https://michigan.fisheryfacts.com/mobile> on a smart phone or tablet via your username and password, you will be able to view past purchases in “My Transactions”.

To view past transactions and purchase details from each of your transactions:

- 1) Click on **My Transactions** on your homepage (main menu).
- 2) To narrow down your search results select a **specific date range, species, seller name &/or seller type** and then click “**Search**”. All fields are optional based on the data that you are looking for. After generating the search results, your transaction summary will be displayed below the search criteria fields. **Note: You can also add a “New Transaction” at this time.**

Note: You will then be able to download and save a copy of your transaction summary as a CSV spreadsheet file by selecting the “**Download Results**” button located above your purchase records.

- 3) To edit the details of a particular purchase, click on the **edit** button in the top right-hand corner of each purchase record.

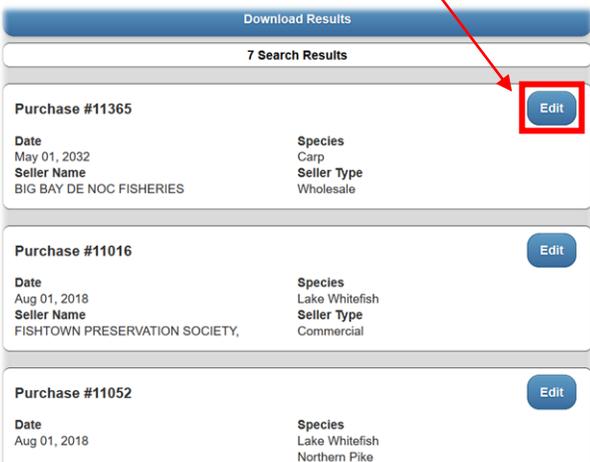


Figure 22 Mobile Transaction Search Results

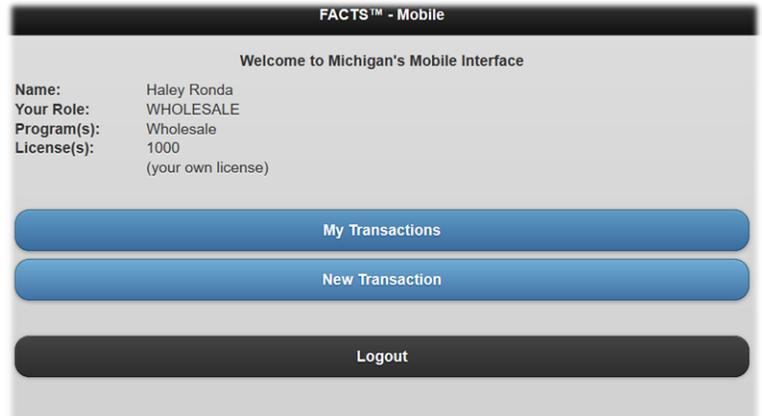


Figure 20 Mobile Home Screen

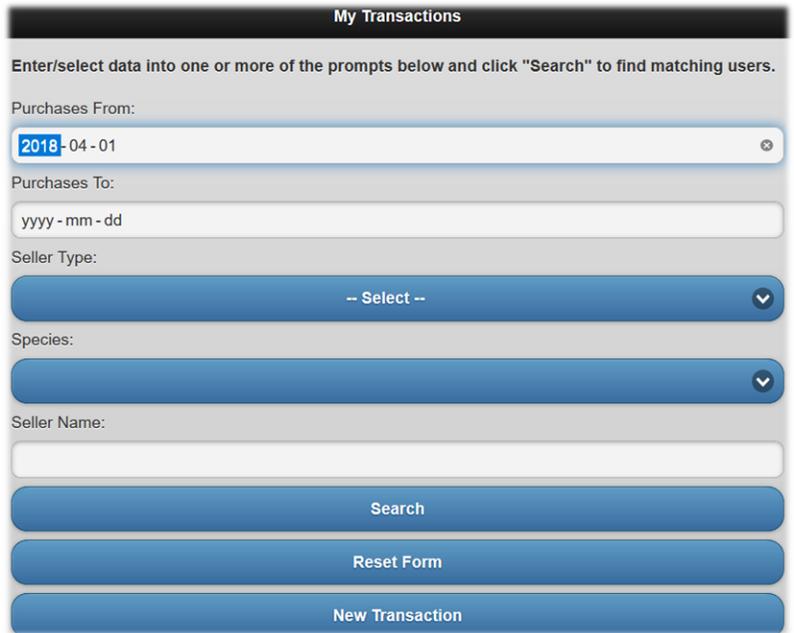
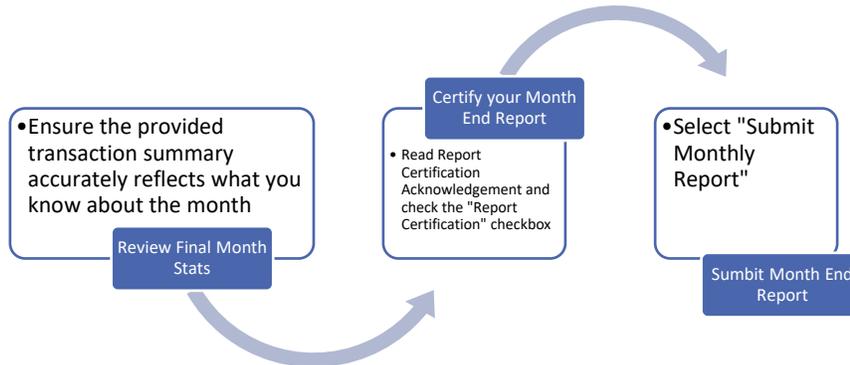


Figure 21 Mobile New Transaction

HOW TO SUBMIT YOUR MONTH END PURCHASE TRANSACTIONS

Data submission of all transactions for a given month is required by the 10th of the following month. Data collection was completed via the mobile site or desktop and you will now use the desktop website to verify your monthly purchases and complete your official transaction monthly report.

During this step you will be able to: Review all purchases and submit your official monthly report. To complete and officially submit your monthly purchase transactions you must either have no purchases for the month box checked or have entered & accounted for all purchases (via batch file upload or individual purchase records).



Purchase Transaction Review

Transaction Review is license specific. This screen allows you to review all transactions previously entered and allows for adding transactions if needed. If you have no purchases in the month you are reporting on you will utilize the **“No Purchases in (current month)”** section of this review.

Report Certification

This is where you will certify your monthly transactions. You won’t see this section if there are no transactions on file (until you checked the box to indicate no purchases).

The monthly report home (report certification) gives you the ability to add missing transactions and update existing ones to correct errors and then certify what you are reporting is accurate.

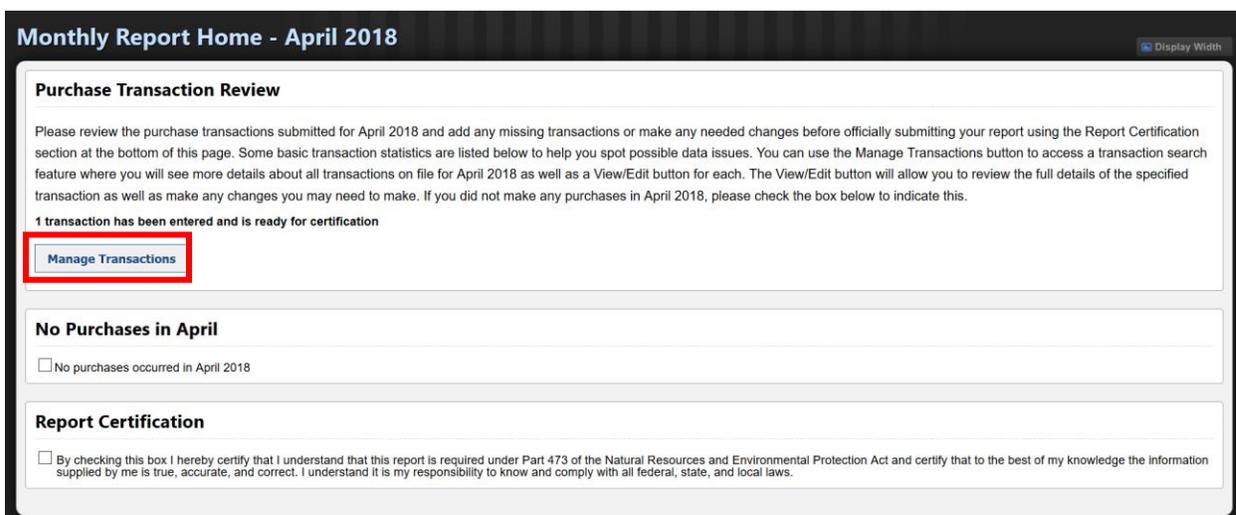


Figure 23 Monthly Purchase Transaction Review Screen

To add or alter previous transactions, select **“Manage Transactions”**. **“Manage Transactions”** will take you to the **“Transaction Details”** page where you can see transactions for the current month, add transactions and edit any existing transactions.

Figure 24 Transaction Details

Future Monthly Reporting Status

FACTS™ will look 12 months ahead and allow you to indicate which months you will not be purchasing fishery products and therefore will not be reporting for. When reporting for the current month, you have until midnight of the last day of the month to change your answer. Once the last day of the month has passed, you can no longer use this feature to indicate that you will not be reporting – instead you must go through the month end reporting process.

| Month | Year | |
|-----------|------|--|
| June | 2018 | <input type="checkbox"/> Not reporting for the month of June 2018 |
| July | 2018 | <input type="checkbox"/> Not reporting for the month of July 2018 |
| August | 2018 | <input type="checkbox"/> Not reporting for the month of August 2018 |
| September | 2018 | <input type="checkbox"/> Not reporting for the month of September 2018 |
| October | 2018 | <input type="checkbox"/> Not reporting for the month of October 2018 |

Figure 25 Future Monthly Reporting Status

To indicate that you will not be reporting:

- 1) Click on the **Purchases** menu tab in the top left corner of your homepage and select **“Future Monthly Reporting Status”**.
- 2) Select applicable months that you not be reporting.
- 3) Select **“Update”** – you will be prompted to certify that you will not be reporting for the month(s) you have selected.

Note: You won’t be able to indicate no reporting for the current month if non-cancelled transactions exist. You will instead need to go through the month end reporting process – either delete transactions if they are inaccurate or proceed with recorded transaction and certify your month end reporting.

DID YOU KNOW

The following sections detail how select boxes and multi-select boxes work.

How Do I use the Select Boxes?

A normal select only allows you to select one option (see Figure 26 “Single select box”). If you want to select “Michigan” in amongst a dropdown select box with several other state’s beginning with the letter ‘M’, the key is that you have to hit ‘M’ to drop down to the state’s that start with ‘M’. Then keep hitting ‘M’ to step through the ‘M’s’ until you get to Michigan. Likewise, if you wanted to select “Oregon”, clicking through the ‘O’s’ until you get to Oregon.

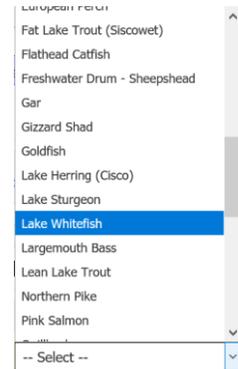


Figure 26 Single select box

How Do I Select Multiple Items?

A multi-select box allows you to select one or more options (see Figure 27 “Multi-select box”). When you hold down the “Ctrl” key and click (left mouse button), the item becomes highlighted. You can select more than one item from any part of the list using Ctrl-click, such as the first and last items. Deselecting is the same as selecting, Ctrl-click any highlighted item to deselect.



Figure 27 Multi-select box

REPORTS

Monthly Report History

This report allows you to download your past submitted data. This downloadable report will always be your most recently submitted official version.

To view your Monthly Report History:

- 1) Click on **Reports** on your homepage (main menu) and select “**Monthly Report History**” from the drop-down menu. See figure 28 “Monthly Report History”.

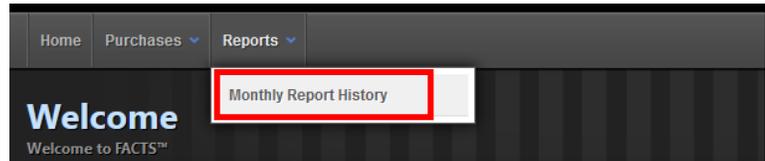


Figure 28 Monthly Report History

- 2) Select the **year** you would like to see reporting history for. Once the year has been selected, the page will automatically show the list of reports when the page loads.

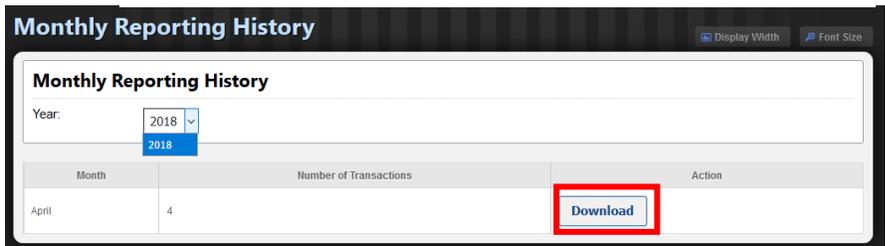


Figure 29 Monthly Report History - year selection

- 3) Once you have selected a year, you will be able to **download** and save a copy of your monthly reporting history as a CSV spreadsheet file by selecting the “**Download**” button located under action. See figure 29 “Monthly Report History – year selection” and figure 30 “Monthly Report History – report example”.

Note: The year select box will allow you to show all reports to date for the year you have selected and it will always be defaulted to the current year.

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|------------|------------|------------------|------------------------|---------|----------------|------------------|-----------|---------|--------|--------|----------|
| 1 | Transactic | Date | Seller_Type | Seller_Name | License | Harvest_Waters | Species | Condition | Type | Weight | Price | Amount |
| 2 | 14923 | 2018-04-19 | Wholesale | 41 MARKET Wagmer | 1111 | Lake Michigan | Splake | Dressed | Fresh | 50 | \$5.00 | \$250.00 |
| 3 | 13522 | 2018-04-17 | Wholesale | ALNAMER FISH & SEAFOOD | 1111 | Lake Michigan | Carp | Dressed | Fresh | 50 | \$5.00 | \$250.00 |
| 4 | 13531 | 2018-04-10 | Wholesale | ALNAMER FISH & SEAFOOD | 1111 | Lake Michigan | Chub | Roe | Raw Roe | 4 | \$6.00 | \$24.00 |
| 5 | 14914 | 2018-04-10 | State Commercial | BREY FISHERIES | 1111 | Lake Erie | Carp | Dressed | Fresh | 100 | \$5.00 | \$500.00 |
| 6 | 14914 | 2018-04-10 | State Commercial | BREY FISHERIES | 1111 | Lake Erie | Flathead Catfish | Dressed | Frozen | 50 | \$5.00 | \$250.00 |

Figure 30 Monthly Report History - report example

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