ActiveWeb™ User Manual

ActiveWeb™ User Manual

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Technical Editors

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1 Introduction

1.1 About This Manual

Welcome to ActiveWeb

This manual is meant as a user reference to **ActiveWeb**. It will help you to perform your daily operations easily and efficiently; whether it be for searching, ordering, viewing, adding items, printing labels or any other operation, this manual will guide you through it.

For a quick overview of ActiveWeb's capabilities, see the Promotional Video.

Conventions Used in This Manual

This manual was created for both online viewing and print. When references to other topics are made throughout the manual, they are made with hyperlinks to enable you to browse to the referenced topic with a simple click of the mouse.

A page icon with the page number inside is always located to the right side of the hyperlink to reference page numbers when the manual is printed. The page icons looks something like this:

25

In this case, it would mean that the referenced topic can be found on page 25 of the manual.

Example: Here is a reference to the start page of the Inventory 17 section of this manual.

Your Feedback

Your feedback and opinion is very important to us. If you find errors in the document or have suggestions on how to improve it, please feel free to send us your comments at support@docudatasoft.com.

1.2 Prerequisites and Technical Considerations

Prerequisites and Technical Considerations

Most of ActiveWeb's functionality works without dependencies on most modern web browsers including Internet Explorer, Firefox, and Google Chrome.

Certain aspects of ActiveWeb's electronic document management and imaging functionality require a Java plug-in. These are:

- Uploading electronic documents or checking them in and out.
- Using your scanner to add your own electronic images to a file.

To use these, you will need to have the "Java Runtime Environment" (JRE) installed on your local computer in order to use the image scanning feature of **ActiveWeb™**. The minimum version required is "JRE 6 Update 10", though your browser and company's security policy will likely require you to have a more recent version. Go to "http://www.oracle.com/technetwork/java/javase/downloads/index.html" to download the package or click here to access the download page directly.

For browsers such as Chrome version 45 or later, you may need to specifically enable the Java plug-in. If this is a problem, we recommend using a browser such as Firefox or contacting support@docudatasoft.com for a link to the latest instructions on enabling Java on your browser.

If you have technical difficulties accessing or using the software with issues not covered in this manual, please contact your record center for support.

1.3 Obtaining a Username and Password

In order to use **ActiveWeb**, you must be authorized both with your record center and your company. You will need a user name and password to access the software. If you do not have them already please contact your record center.

1.4 Signing In or Logging Out of ActiveWeb

ActiveWeb is accessed via the internet. If you do not already have the internet address of ActiveWeb please ask your record center.

You can also view the video on the same subject.

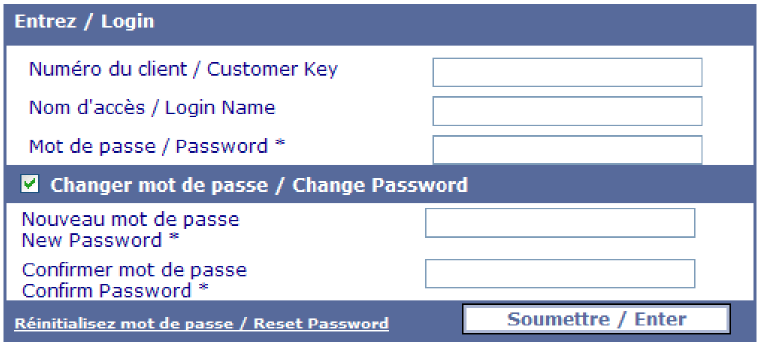
This screen will appear when you first login to ActiveWeb:

Note: The DocuData logo, colors and languages may have been replaced with those of your record center.

Logging Into ActiveWeb

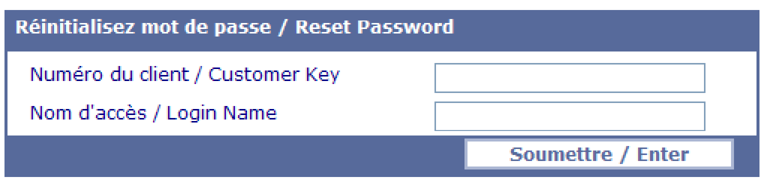
- To login, enter your customer key, login name (or e-mail address) and password in the provided fields and click on the "Enter" button.

- If you want to change your password while logging in, click the "Change Password" check-box. These additional fields will appear:



In the two additional fields, enter and confirm your new password. Then press the "Enter" button to login and change your password all at once.

- If you have forgotten your password, click on the "Reset Password" link, which appears to the left of the "Enter" button. You will be asked to enter your customer key and login name (it can also be the email you gave the record center):

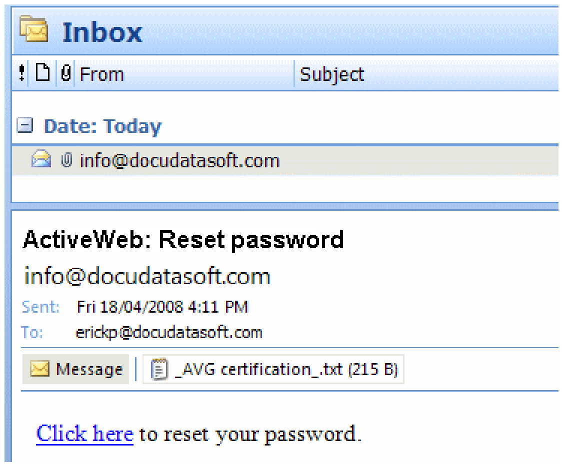


After pressing "Enter", this screen will appear confirming an email message has been sent to you:

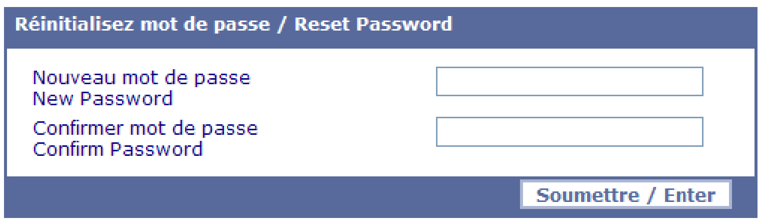
If for some reason the email was not sent, this message will appear:

If this happens, please contact your record center to advise them. It is probably because you have no email address configured for your account at the record center.

When your email is received, this acknowledgment will appear prompting you to reset your password:



When you "Click Here" on the link in the email, you will be directed to a page on the web where you can choose a new password for yourself:



Check off "Remember" to save your login information.

Changing Your Password

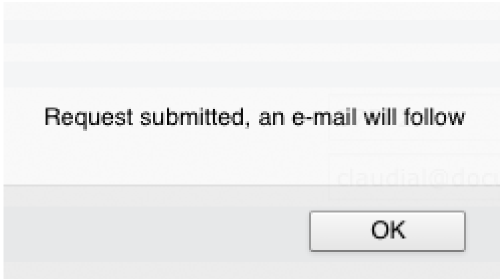
Check off "Change Password" and enter your current and new password in the fields.

Resetting a Password

If you have lost your password, click on "Reset Password" at the bottom of the login fields. Enter your account number and email (e.g. CUS-001, admin@company.com). The system will automatically send you a new temporary password via email.

Your account may have security requirements in place, such as passwords must be between 6 to 16 characters long and contain at least one number and one letter, or you can only log in from certain location. Please contact your record center if you require more information about this.

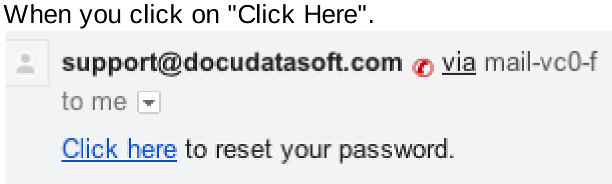
After clicking "Enter" you should receive a confirmation that an email has been sent to you.



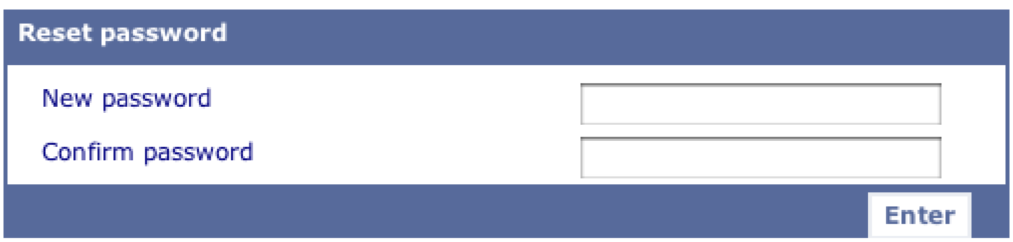
If for some reason your email did not go through, the system will let you know what the problem is (e.g. invalid parameter value: account number, etc.).

If the problem persists, contact your record center.

When you click on "Click Here".



You are redirected to a page where you can choose a new password for yourself.



The system will confirm the change.

Logging Out of ActiveWeb™

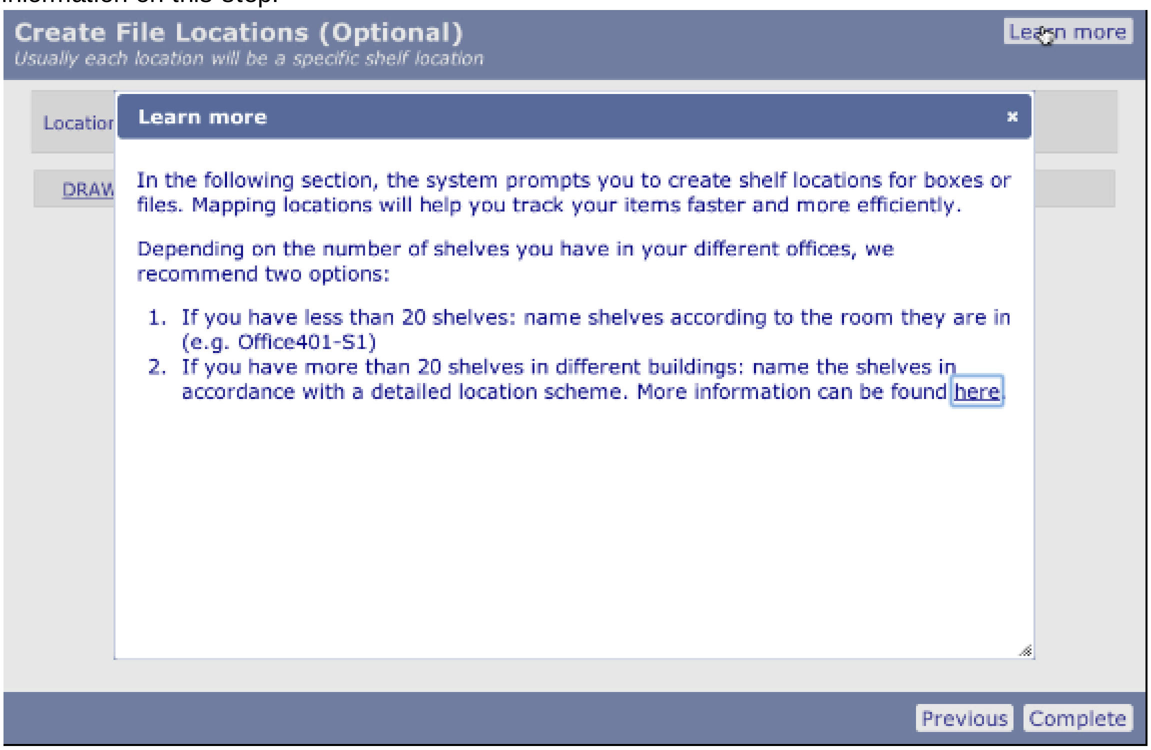
At the top of the **ActiveWeb™** window, click on "Quit" at the far right.

1.5 Setting Up ActiveWeb With the Wizard

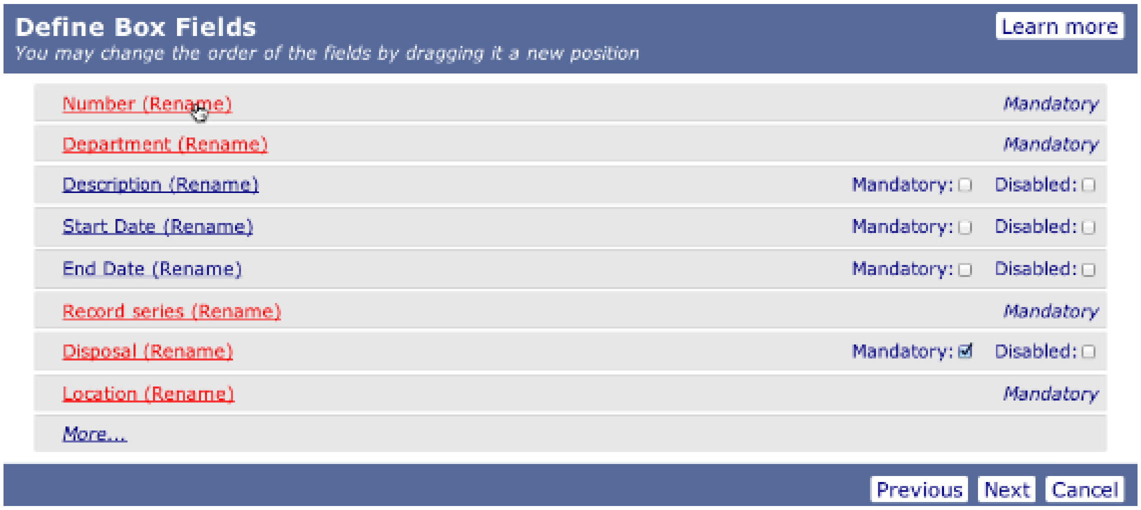
Your record center will help you to configure your ActiveWeb account to meet your business needs. If you have an existing records management system then you will likely set up by importing that data.

If you are looking for guidance in setting up a new records management system then your record center might walking through the set-up wizard described here.

Learn More
In any of the steps of the set up wizard, you can click on the "Learn More" button to have additional information on this step.



1. Define Box Fields
Click on a field to rename it. Save the changes.



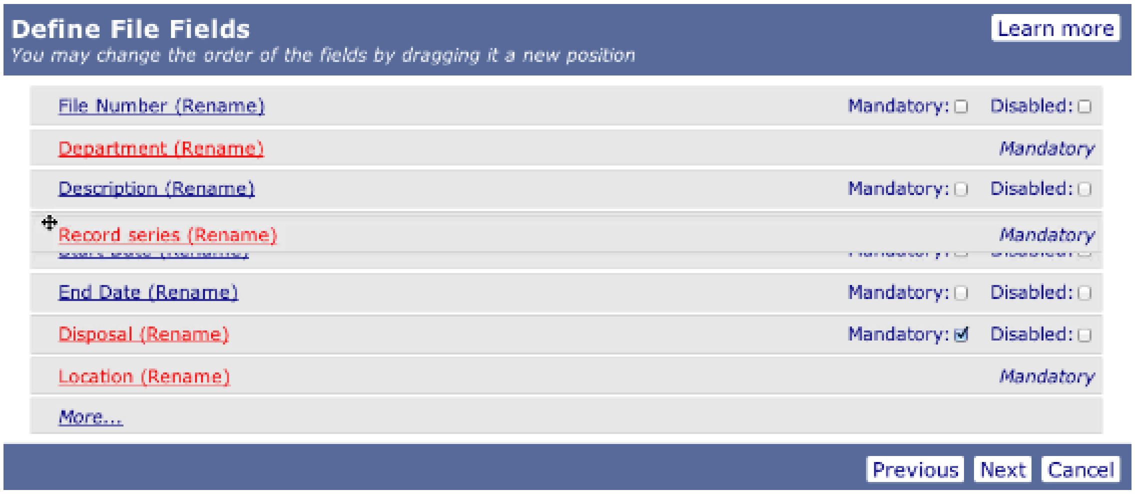
Note: To manage "Field Definitions", consult Field Definitions Box (Click here.) 101

Red fields are mandatory, Blue fields are optional and Grayed out fields are disabled.
Click on "More" to show additional fields.

To enable a field, uncheck the "Disabled" box.

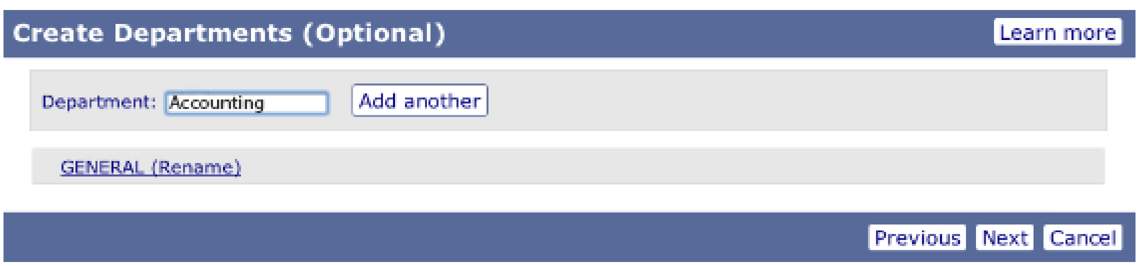
Click "Next" once all changes have been made to save them.

1. Define File Fields
To reorder the fields, position your cursor next to the name of a field to get the repositioning cursor. Click and drag a field in the position of your choice.



The only difference between file and box fields is that files have additional fields to use.
Click on "Next".

2. Define Departments
To create a department, enter a value in the field and click on "Add".
To add another department, enter a value and click on "Add Another".



If you do not want any departments, click on "Next" and a default one will automatically be created.

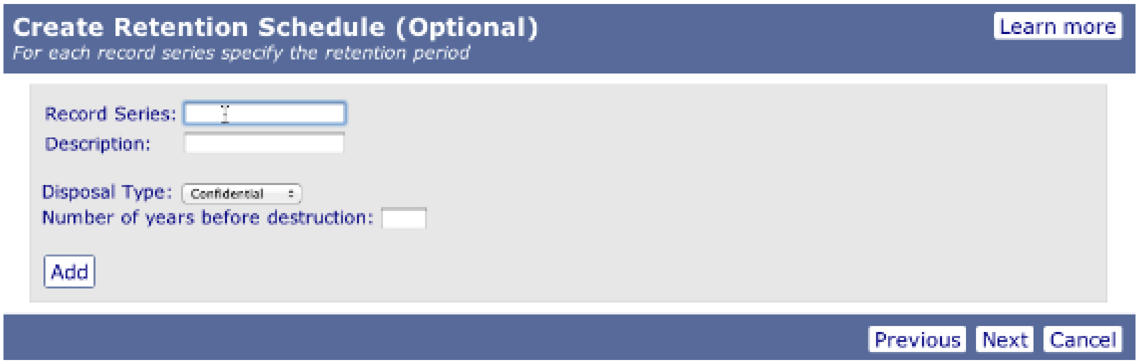
3. Create Retention Schedules
This step encourages you to create one or many "Retention Schedule 98" that determine the amount of time records are kept before being destroyed. Enter a name and a disposal type (Confidential, Recycle or None). Lastly, indicate the number of years the records are to be kept.

Note: The description field is optional.

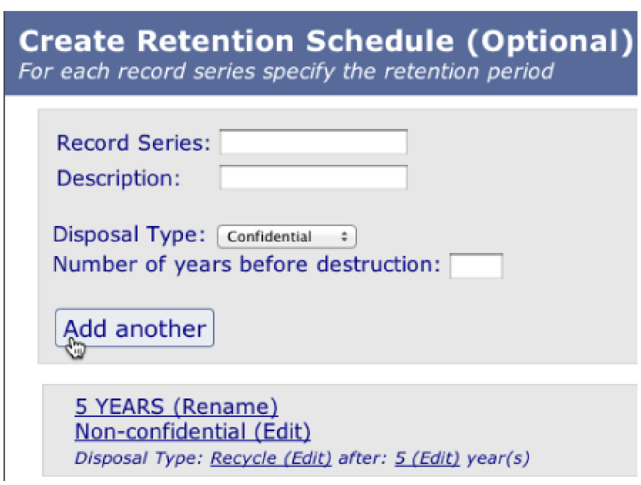
Here is a small description of each disposal mode:
- Confidential: This type of disposal is usually reserved for documents containing highly delicate or confidential information. Typically, confidential disposal must respect certain rules for shredding size and disposal methods.
- Recycle: this means that the items should be shredded or recycled.
- Sample: this means that the items will be sampled before their destruction mode is decided upon.
- Revision: this means the items will be placed on a list to undergo verification before being disposed of.
- Permanent: this means that the item should not be disposed of and should be kept indefinitely.

- None: this means a disposal mode has not yet been determined.

Note: Rules and regulations regarding retention and disposal of records vary from government to government. For more information on these rules and regulations, consult with your local, regional and federal governments.

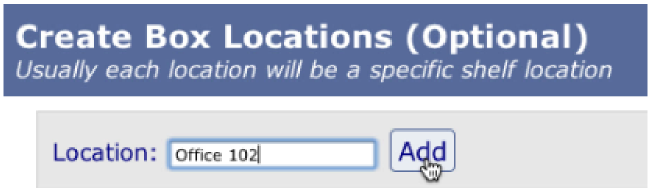


Click on "Add".
You can then edit the information you have entered and save changes.

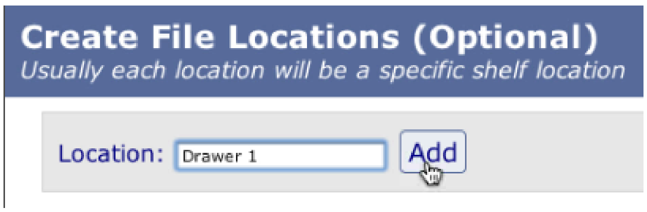


Click on "Next".

4. Define Box Locations
Create box locations by entering a name and clicking on "Add". You can add more than one location.



5. Define File Locations
See the previous step.



6. Complete the Wizard
Click on "Complete".

This will redirect you to **ActiveWeb™** interface.
Go in the **Inventory tab** 17 to Add Your First Boxes 28.

1.6 Navigating in ActiveWeb

- Navigation from page to page must be done solely using the buttons, links and icons on the pages themselves. You cannot use the "back" or "forward" buttons of your browser to navigate.

- At the top of each page in **ActiveWeb™**, tabs allow the user to switch tasks easily.

- For security reasons, sessions will "time out" after a defined period of inactivity. (By default the timeout is 15 minutes.)
- When the session is about to timeout, a warning appears. Clicking the "OK" button within 1 minute will permit you to continue your session.

Note: This "time-out" can be changed (between 5 and 715 minutes) by your record center if needed.

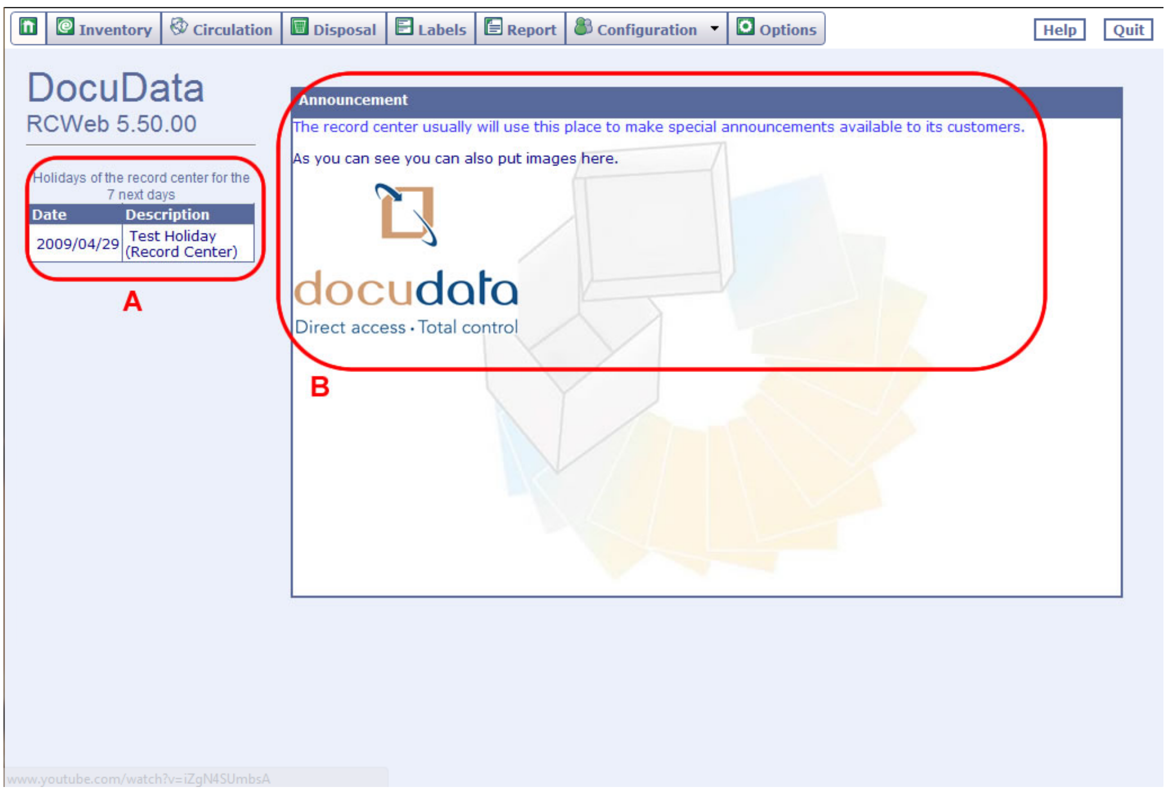
2 Home Tab

2.1 Home

The **Home** tab is the first window displayed after you have successfully logged into **ActiveWeb™**.

(A) To the left, ActiveWeb displays holidays for the next 7 days. This includes record center holidays, as well as holidays specific to your own organization.
(See Holidays 108 for instructions on adding your own holiday dates to prevent accidental scheduling of deliveries on these dates.)

(B) To the right, your record center may post useful information including announcements and links.



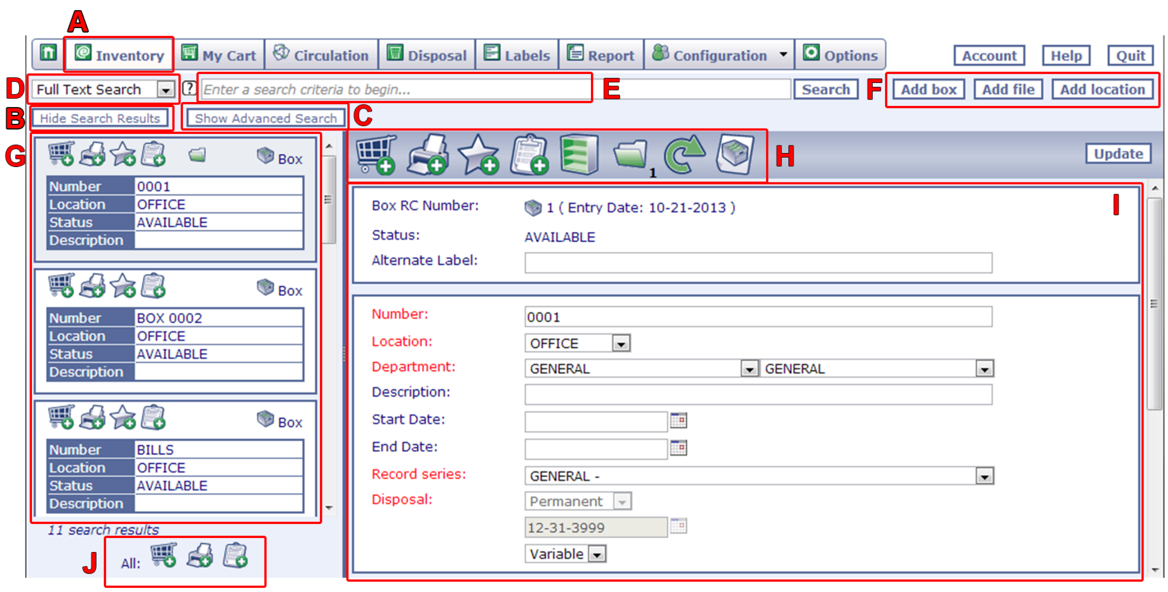
3 Inventory Tab

3.1 Inventory Tab Layout

The **Inventory** tab is used to:

- Add boxes and files to your inventory.
- Add images and documents to your inventory.
- Query and edit information for existing inventory.
- View and modify your list of "Favorite" items.
- Add or remove items from a "Work List".
- Add items to a label print list 89 .

The following images highlights key features of the **Inventory** tab. The **Red** letters on the screen shot are referenced by the text below.



In the screen shot above:

A.

The active tab is highlighted, telling you where you are. Clicking on one of the other tabs will take you to it.

B.

The "Hide / Show Search Results" button toggles the list of search results on or off (indicated by the letter "G" on the picture above).

Note: The search results can be moved to any side of the screen (Top, Bottom, Left or Right) if you wish. This can be configured in the **Options** 115 tab.

C.

The "Hide / Show Advanced Search" button toggles the display of additional search filters on or off. The filters are hidden in the screen shot above and displayed in the image below.

Note: A little warning box beside the "Show/Hide Advanced Search" button (See below) indicates that filters are active. Forgotten active filters are a common reason for not being able to find the expected items with a search.

D.
This drop-down allows you to select the index or the type of search to use. This is also used to view your favorites list and work list. Other options may include Box - Number, File - Description, Full Text Search, and many others.

E.
This is the place where you enter your search keywords. Click on "Search" to start your search. Search results will include any items that meet both the search criteria and the active filters. These are displayed in area "G". Search results may be positioned using the **Options** [115] tab [115].

F.
These are the buttons you use to add a box, file or location to your inventory. See "Adding or Deleting a Box or File" [28] and Adding a Location [31].
If you have data import templates available, you may also see an import [39] button.

G.
These are search results. They may be hidden by clicking on "Hide Search Results" (B). Search results may also be repositioned and made to include different fields using the **Options** [115] Tab [115].

H.
This toolbar allows you to work with the displayed item in various ways. Below is an explanation of each icon.

Add to Order

This icon is used when you want to place an item to your order. You can view the list of items you added to your order by clicking on "My Cart" tab in the top section.

Add to Print List

This icon is used when you want to place your item's label on a print list. To print your labels, select the **Labels** tab and print them from there. More information about printing labels is contained under the **Labels** [89] tab [89] section later in this manual.

Add to Favorites

This icon enables you to place an item on a list of "Favorites". You can then go back to your "Favorites" to quickly access the items you have placed there. The "Favorites" are accessed via the "Search Types" drop-down box as explained in point D above.

Add to Work List

This icon enables you to put items on or off your "Work List". "Work Lists" can be later used to populate disposal lists. Refer to the Using the Work List [36] topic later in this manual for more information on work lists.

Refresh

Clicking the "Refresh" icon will update the information for this file, box or location based on what is in the database. This may be necessary if someone else is working on the data for the same file, box or record.

Print Box Details

Clicking on the "Print Box Details" icon will bring up a PDF report listing the details (fields and history) of the box.

Note: You will need a PDF reader to view these reports. PDF readers are available free of charge from many sources including http://www.foxitsoftware.com.

The following icon only concerns boxes:

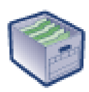
Files

Clicking on the "Files" icon will bring you directly to the file section of the current box.
The number indicates how many files are indexed in the box currently displayed.

Location

Clicking on the "Location" icon will bring you directly to the location section of the current box.
You can view details about the location as well as other items stored in this location.

The following icons only concern files:



View the Box Containing this File

If you need to refer back to the box that contains this file, click on the "View the Box Containing this File" icon.

Print File Details

Clicking on the "Print File Details" icon will bring up a PDF report listing the details (fields and history) of the file.

Note: You will need a PDF reader to view these reports. PDF readers are available free of charge from many sources including http://www.foxitsoftware.com/

Documents

Clicking on the "Documents" icon will bring you to the documents section 40, where you will be able to view and work with them. A number indicates how many documents are attached to the file.

I.
This is the part of the screen where you see the details (data fields) of the currently selected item(s). By scrolling down this section you will find different areas of interest such as Notes, History, Files, Images (when viewing file information only) etc. The status field can be either "IN (In-House)" or "Electronic".

J.
You can use these buttons if you want to add all of the items you see in the search results at

once on the labels "Order", "Print List" or "Work List". More information about orders and label printing can be found in the **Labels** 89 tab 89 section of this manual.

3.2 Description of Default Fields

Fields in **ActiveWeb™** may be renamed, hidden, or made mandatory according to the needs of your organization (see the Setting Up 11 **ActiveWeb™** 11 topic). The following is a list of the default fields and how they may be used. When in doubt, please ask your record center.

Field Descriptions

Status
Automatically updated field that indicates the current status (activity can also be used) of a box or file. The status of an item will affect what can be done with it. For example, items that are "IN" are available for order. Items that are "SELECTED" have been placed on an order that has already been submitted and therefore cannot be placed on a second order at this time.

Some statuses and their meanings include:

- PRINTED: The record and label exist but have not yet been used.
- IN (In-House): this means that the item is at its assigned location.
- 'OUT (In-House): this means that the item is already in someone's possession (recipient).

- PRE ADD: To be sent to your record center

- IN: At your record center
- OUT: Temporarily out to the specified recipient
- SELECTED: Awaiting delivery to a recipient

- TO DESTROY
- TO DELETE
- TO TRANSFER

- DESTROYED: Destroyed by the record center after processing an authorized disposal request.
- DELETED: Permanently removed from storage but not necessarily destroyed.
- TRANSFERRED: Transferred to another account or storage facility based on an authorized transfer request.

Recipient
When an item is "OUT" or "OUT (In-House)" another field will appear at the right of the status. This field designates the recipient to whom the item is now registered to and when they received it.. You can change the recipient of an item (this action is also called a "Change of Hands") by modifying the name in the field and pressing on the "Update" button. The system will add this change in the item's history once the item itself is updated.

Consult the following topic for information on managing your Recipients 109.

RC (Record Center) Number
This number is created automatically and sequentially assigned by the system and is a read-only numeric field. Within an account and item type, the RC Number is unique. It is used internally by the system for tracking purposes. It also appears as the last segment of the box and file bar codes.

Old Number
This is a read-only alphanumeric field containing a maximum of 16 characters. When a box or file number is modified, the previous number will be displayed in this field for reference. Number

changes are also recorded in the record's history.

Alternate Label
Optional alphanumeric field containing a maximum of 30 characters. Your record center will advise you to fill in this field, which allows the tracking of your items using bar codes produced outside ActiveWeb.

Entry Date
Read-only field. Until the item arrives at the record center for the first time, the entry date will indicate the date on which the record was created. Once it has arrived at the record center, the Entry Date indicates the date of the delivery on which the item first arrived at the record center. If no end date or fixed disposal date is available for the record, this may be used in calculating the disposal date of that record, based on the document type.

Withdrawal Date
Read-only field that indicates the date when the box or file has been removed from the inventory (date at which the document became DELETED, DESTROYED or TRANSFERRED).

Number
This field is required for boxes only and is an alphanumeric field containing a maximum of 20 characters. This maybe read-only. Examples of valid values include: 100, 100-01-01, TB-00002.

Owner
This is an optional user defined alphanumeric field containing a maximum of 20 characters. This field is usually used to indicate to whom the box or file belongs.

Department
This is a required drop-down alphanumeric field containing a maximum of 30 characters that indicates to which department and sub-department a box or file belongs to. For example, "CLAIMS/CLOSED CLAIMS" indicates that the box is in the "CLOSED CLAIMS" sub-department of the "CLAIMS" department. Departments may be configured through the Departments 95 section of the **Configuration** tab.

Description
This is an optional alphanumeric field containing a maximum of 40 characters. This field contains the description of the item.

Note: There are additional fields available that can also be used as description fields. If your description includes a date range or an alpha-numeric range, it is often best to include this data in the **Start/End Date** and **Range** fields, since these will help you to more easily identify a box that might contain a given file that falls within those ranges.

Start Date / End Date
Optional fields with a predefined date format that can be modified. These fields are used to specify the start and the end dates for files and boxes. The disposal date will be calculated by adding the retention period to the end date (when it is present). Using the date range parameter in the advanced search, it is possible to identify records that might include an item from a specified date.

Start Date
The date when the file or box is created.

End Date

Marks the last day of a file or box active life and is now ready for archiving (**e.g.:** The box containing Invoices 2012 will have an end date of December 31, 2012).

Record Series
This field indicates the Record Series an item belongs to and establishes the Retention Period and Disposal Mode. This required alphanumeric drop-down field contains a maximum of 10 characters. Record Series can be configured through the Retention Schedules 98 section of the **Configuration** tab.

Field 1 / Field 2 / Field 3
These are optional alphanumeric fields of various lengths. These fields are typically either renamed for your own use or hidden. Fields 1-3 accept up to 20 characters and may be associated to drop-down lists of values. Fields 4 and 5 accept 4 characters each.

Access Level
This is a numeric field containing a value between "0" and "9" inclusively. Access Levels can be used to prevent unauthorized users from editing boxes with access restriction ("0" being the least and "9" the most restrictive access). When editing the field, the user can only assign a value less than or equal to his own level.

Note: If the Access Level of a user is less than the box access level, the user is not allowed to view, edit or destroy it.

Disposal
There are three fields related to disposal:

1. The disposal mode, which may be "CONFIDENTIAL", "NON-CONFIDENTIAL", "NONE", "PERMANENT", "REVISION", "SAMPLE" or "SEND TO DEPOT".
2. The disposal date.
3. The disposal date calculation method. If "VARIABLE", the disposal date of a document corresponds to the retention period added to the "End Date" (when present) or to the "Entry Date". If "FIXED", the disposal date is not determined by the retention policy for the document type and may be entered manually or by a data import.

Range
These fields define the lowest and highest values of the alphanumeric index on the documents in the box or file. These fields are very useful if your documents are sorted alphabetically or numerically, for example, by client name or case number. Using the range parameter in the advanced search, it is possible to identify records that might include an item based on an alphabetical index.

Item Set
The purpose of an item set is to ensure that you don't accidentally order one part of a multi-part record. To add an item to an item set, simply type in a name or label, and add the same item set label to the remaining items. As you start typing, the item sets will try to auto-complete, helping you to determine if a label has already been used or not and ensure that you type it correctly.

When one item in an item set is ordered, the remaining items in the set will also be placed on the order. If you do not want the additional items then you can remove them from the order.

Location
The content of this field may vary depending on the type and status of the item.

For boxes, this field will only contain information when the box's status is "IN (In-House)". If it is "IN (In-House)", the field will show the box's present location. However, if it is "OUT (In-House)", the field will show the box's last assigned location.

For files stored "IN-HOUSE" (at the customer location), the field shows the physical location of the file.
It can either be in a box (designated by number) or a on shelf.

To manage locations at your site consult the Managing Locations 31 topic.

Notes
Alphanumerical field used to add notes to an item. When notes are expanded for view, by using the "+" sign, they will remain so for all documents viewed subsequently until they are collapsed by using the "-" sign.

Keywords
Alphanumerical field used to add new keywords to an item. Keywords may be useful when using the "Full Text Search" (see Searching for a Box or a File 25.)
These are search terms that do not appear elsewhere in the record's data, but that you want to be able to find the record by.

History
This read-only field displays the history of the record, including all changes to the descriptive metadata fields as well as when and who touched the item.

The Following Fields Apply to Files Only:

Documents
This section allows you to work with electronic documents associated with a file. For more information, consult the Document 40 features of ActiveWeb.

Images
This sections allows you to view, scan and import images associated with a file. For more information on the imaging features of ActiveWeb, consult the "Imaging Options" 51 section.

The Following Fields Apply to Boxes Only:

Volume
A read-only field that indicates the volume of a box (e.g. a banker's box is 1.2 cubic feet.)

Files
This section displays a list of the files contained in the box. From here you may add files to a print list and you may also navigate to the file record by clicking on the appropriate list line.

Vault
This value indicates if the box is stored in a vault.

The Following Fields Describe Locations Only:

Item Type
This read-only field indicates that this is a location.

Used

Read-only field indicating the quantity of items presently available in this location.

Out
This read-only field indicates the quantity of items assigned to this location that are presently checked "OUT (In-House)" by someone (recipient).

Location
This modifiable field contains the name of the location (e.g. Office 505, John Smith's Office).

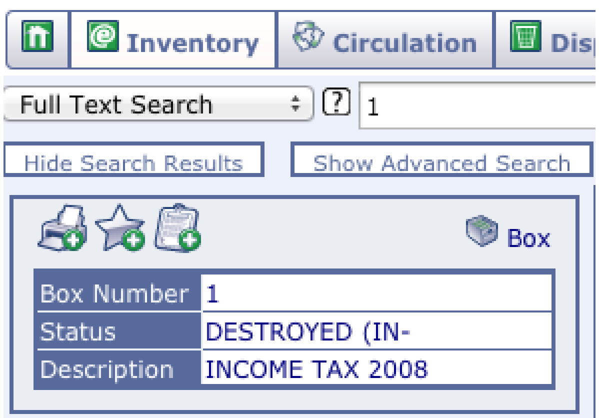
Type
This modifiable field indicates if the location contains boxes or files.

Capacity
This modifiable field indicates the total quantity of items that one can store in this location.

NOTE: Keep in mind that these locations are not the ones the record center uses, but only the ones used internally for offices and file rooms.

3.3 Searching and Viewing Information for a Box or a File

When you search for a box or a file, you have the choice (as seen in the screen-shot below) to "Show" or "Hide" the search filters. Search filters give you the ability to narrow down your searches more precisely. The different filters correspond to the box and file Field Descriptions 21. For a brief video on this topic, see the following video.



Searching for a Box or File

1. Select a search type in the drop down field at the left of the window (see screen-shot above).

2. Enter your search criteria or keyword in the empty field next to it.

You can also include additional filters from the filters section (see the Field Descriptions 21 topics for more information). These filters are available when you click on "Show Advanced Search"; when a value has been entered/selected in one or many fields, a 'Filters Active' warning appears.

Press "Enter" or click on "Search" to initiate your search.

3. The search results appear at the left of the window. By default, the first result in the list will be selected and you will see its details on the right side of the screen.

Performing a Full Text Search

1. Select **"**Full Text Search" in the drop down field at the left of the window.

2. Enter your search criteria or keyword in the empty field next to it. Optionally, you can also include additional filters from the filters section. Press "Enter" or click on "Search" to initiate your search.

3. The search results appear at the left of the window. By default, the first result in the list will be selected and you will see its details on the right side of the screen.

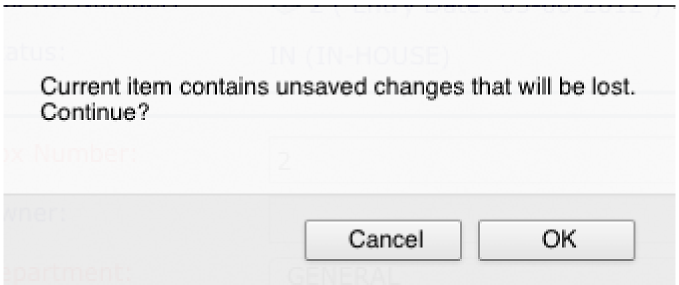
Here are a few additional details:

abc def	Finds documents containing "abc" and "def"
abc OR def	Finds documents containing "abc" or "def"
abc NEAR def	Finds documents containing "abc" near "def"
"abc def"	Finds documents containing the phrase "abc def"
abc*	Finds documents containing terms starting with "abc"
abc -def	Finds documents containing "abc" without any "def"

3.4 Editing Box or File Information

1. Search 25 for an item to edit.
2. Enter the new information in the Field Descriptions 21 (mandatory fields are in red).
3. Click on "Update". A confirmation message appears.

Note: If you edit a record then attempt to navigate away from it without saving the changes, **ActiveWeb™** will display the warning message below. If you wish to save your changes, click on "Cancel" in the dialogue box, then click on "Update".



To Add and Edit Notes or Keywords

1. Click on the "+" sign besides "Notes" or "Keywords" (for notes you can also click on the "Notes" icon).
2. A window appears below the title of the field.
3. Add or edit the "Notes" or "Keywords".
4. Click on "Update".

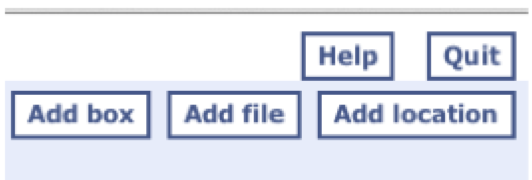
Note: "Keywords" are particularly useful when using the "Full Text Search" options of the **Inventory** tab (see Searching for a Box or a File 25.)

3.5 Adding or Deleting a Box or File

Adding Boxes for the First Time

1. Select the **Inventory** tab.

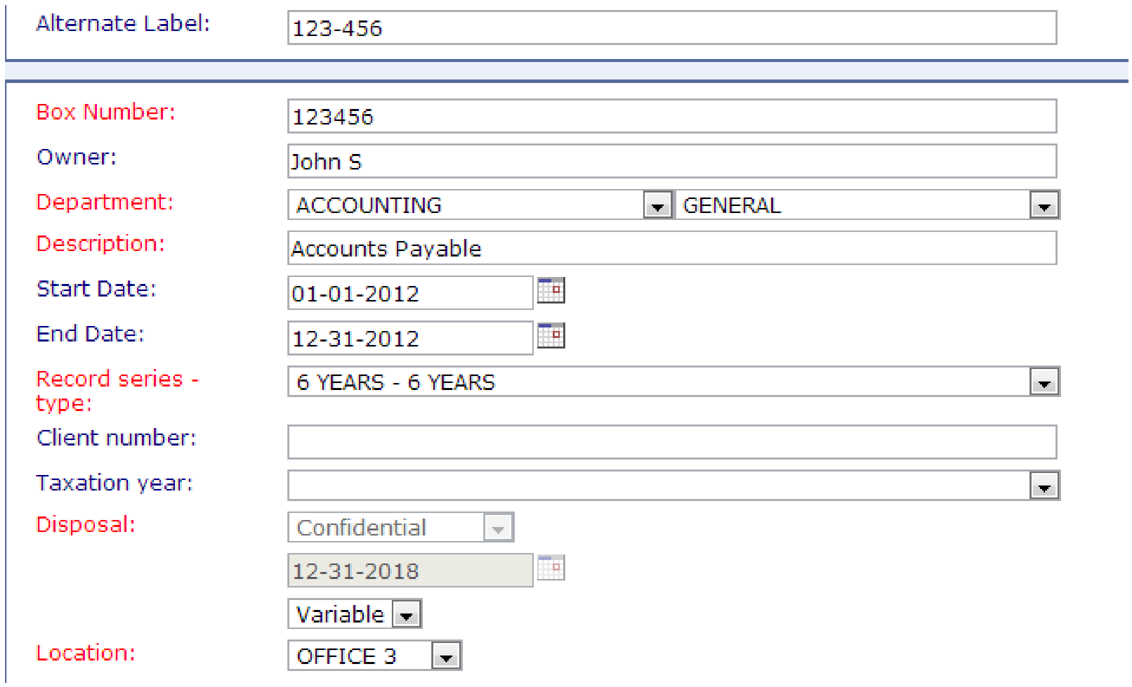
2. Click on "Add Box".



3. If prompted, select the status of the item.

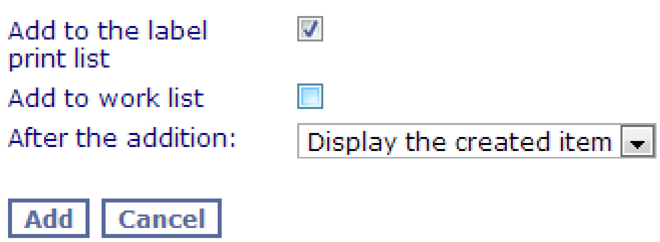
"PRE ADD": This is usually a box in transit to the record center. A Pre Add box is usually: filled with documents, it's content described using the different data fields and shipped over for archiving at the record center.
"IN (IN-HOUSE)": This box will be stored internally in your offices/file room and its content is usually consulted on a regular basis.

A new window appears.



4. Enter the different information of your new box or file (the fields 21 in red are mandatory).

5. Check the "Add to the Label Print List" check box if you want to print the item's Label 89.

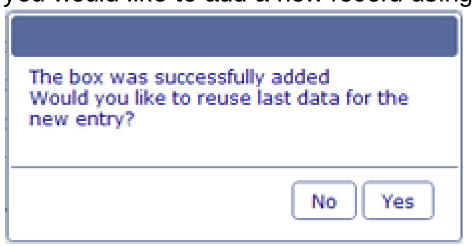


6. To view the item you just added select the "Display the Created Item" option in the drop-down list. To create another item after that select the "Create Another Item" option in the drop-down list.

7. When all the information has been entered click on "Add".

If you have selected the "Display the Created Item" option, a confirmation message pops up:

If you have selected the "Create Another Item" option, a message prompts you to indicate whether you would like to add a new record using similar data.



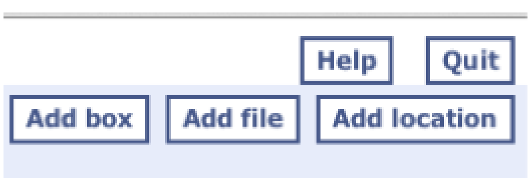
Press "Yes" to reuse the same information and make data entry faster. Press "No" to enter different information for the next item.

Repeat the steps above for every box.

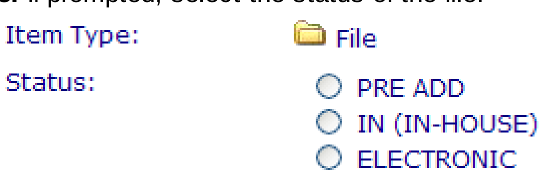
3.6 Adding Files

1. Select the **Inventory** tab.

2. Click on "Add File".



3. If prompted, select the status of the file.



"PRE ADD": This is usually a file in transit to the record center. A Pre Add file is usually: filled with documents, it's content described using the different data fields and shipped over for archiving at the record center (either in a box or on a shelf).
"IN (IN-HOUSE)": This file will be stored (either in a box or on a shelf) internally in your offices/file room and its content is usually consulted on a regular basis.
"ELECTRONIC": At the moment, this file contains electronic content only.

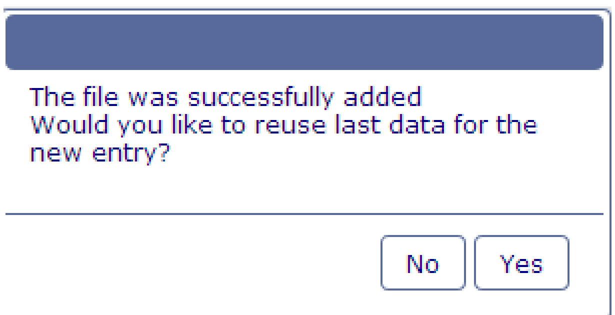
4. A new window appears. Enter the different information of your new file (the Field Descriptions 21 in red are compulsory).

5. Check the "Add to Print List" check box if you want to print the item's Label 89.

6. To view the item you just added, select the "Display the Created Item" option in the drop-down list. To create another item after that, select the "Create Another Item" option in the drop-down list.

7. When all the information has been entered click on "Add".

If you have selected the "Display the Created Item" option, a confirmation appears.
If you have selected the "Create Another Item" option, the following message appears:



Press "Yes" to reuse the same information and make data entry faster. Press "No" to enter different information for the next item.

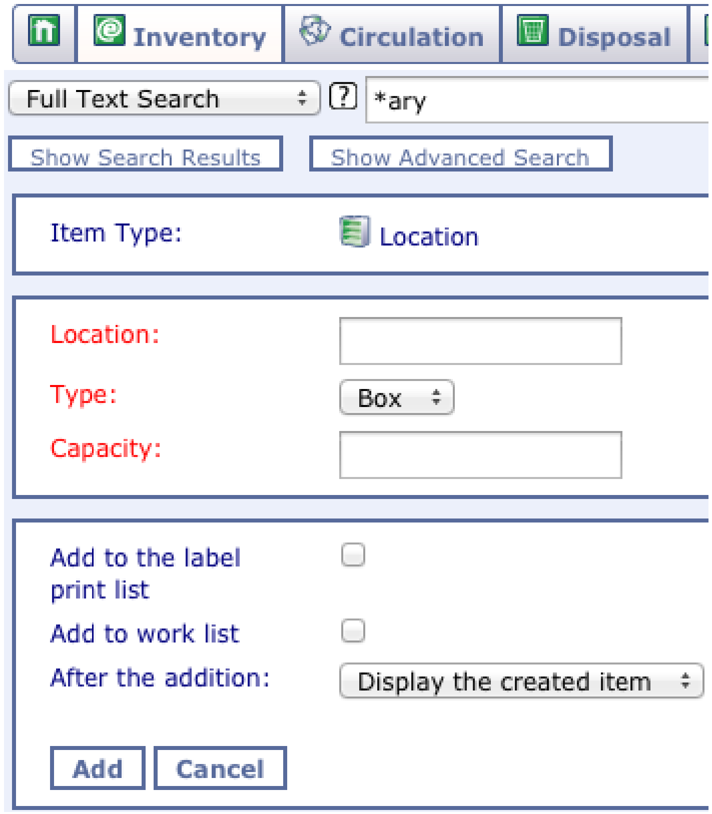
3.7 Managing Internal Locations

Adding a Location

1. Select the **Inventory** tab.

2. Click on "Add Location".

3. A new window appears.

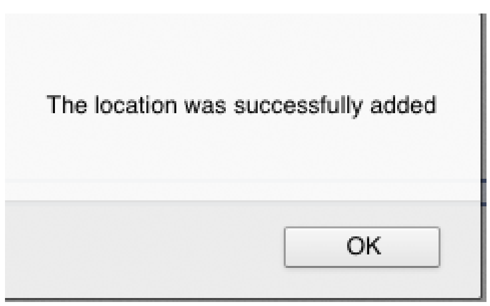


4. Enter the information in the different fields 24 :

- Name the new location.
- Select the type of location (box or file) you want to add.
- For a box location, enter the capacity (total number of boxes that fit) of that location.
- For a file location, check off the "Full" box or leave it blank, when it is empty or not entirely full.

5. To view the item you just added select the "Display the Created Item" option in the drop-down list. To create another item after that, select the "Create Another Item" option in the drop-down list.

6. When all the information has been entered click on "Add" at the bottom of the window. This confirmation message pops up.



7. If the location is displayed, you may add it to the print list by checking off the printer icon. To print labels please consult the following topic: How to Print Labels 89.

Searching for a Box or File Location

1. Select one of the following search types in the drop down field at the left of the window:
- Location - Box
- Location - File

2. Enter the location name partially or entirely. Press "Enter" or click on "Search" to initiate your search.

3. The search results appear at the left of the window. By default, the first result in the list will be selected and you will see its details on the right side of the screen.

Assigning a New Location to an Item

The box or file needs to be in the "OUT (In-House)" or "IN (In-House)" status for the following steps to be valid.

1. Searching for a Box or File 25.

2. Scroll down to the location field.

3. For a box:
- o Select a location in the drop-down list.
- o For a file: Select if the location is a box or a shelf. Either enter a box number or select a shelf in the drop-down list.

4. Click on "Update".

Note: If you wish to indicate that the box or file is either leaving from or returning to its internal home location, then consult the Check OUT Items 71 / Check IN Items 74 topics.

3.8 Managing a Rotation Schedule

ActiveWeb will check your scheduled delivery dates against record center and customer specific holidays.

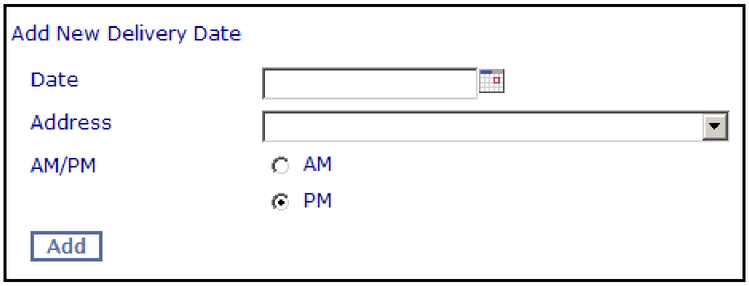
Note: Prior to scheduling your tape deliveries, enter your organization Holidays 108 in ActiveWeb.

Scheduled delivery dates appear as a calendar icon, with the number of scheduled dates appearing as a number to the lower right. Clicking on this icon will take you to the Rotation Schedule section of the record.

If this section is collapsed, you may expand it by clicking the "+" button. (See below.)

In the rotation schedule section, there are three methods for adding more delivery dates:

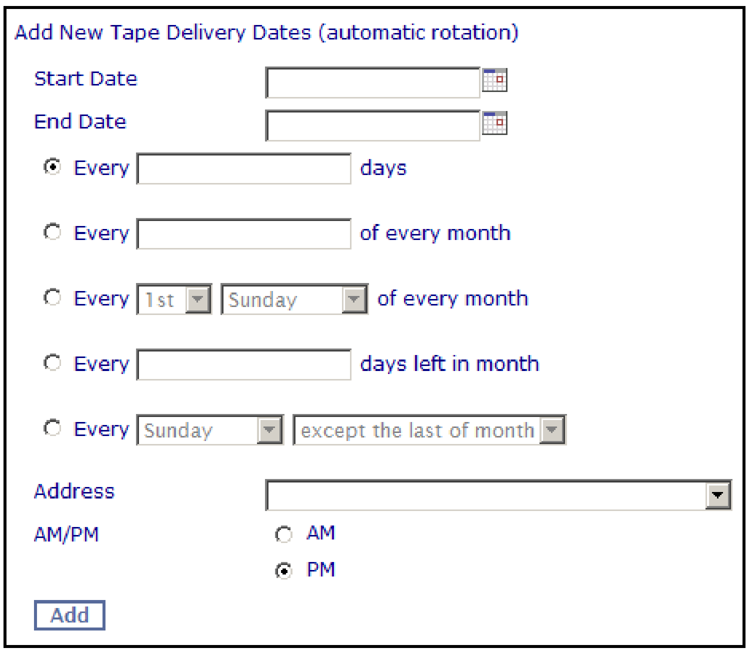
1. Adding an Individual Delivery Date



A. Type a date or select it using the calendar
B. Choose the address at which to deliver the tape
C. Select the preferred delivery time period (AM or PM)
D. Click the "Add" button

2. Adding Multiple Delivery Dates Using a Schedule

You also have the option to set a recurring set of dates as seen in the screen-shot below:



Here is a description of the different fields:

- **Start Date:** The earliest delivery date to be created will be this date or the first date after this date that fits the specified pattern.
- **End Date:** The latest date to be created will be this date or the last date prior to this date that fits the specified pattern.
- **Every "X" days:** If you want the tape/box every week you would enter the number 7.
- **Every "X" of every month:** If you want the tape/box on the 15th of every month you would enter the number 15.
- **Every "X" [Weekday] of every month:** If you want your tape/box on the second Friday of every month you would enter "2nd" and "Friday".
- **Every "X" days left in month:** If you want your tape/box delivered 5 days before the end of each month you would enter the number 5.
- **Every "Specific Day" + "Except [last / last week] of month":** Here you can schedule your tape/

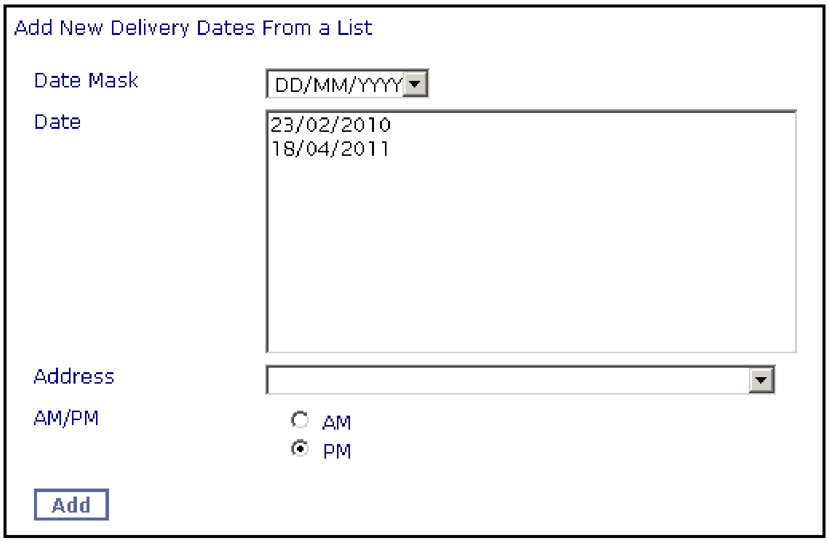
box for a specific week day, with the exception of the last [week day] of the month or with the exception of the [week day] of the last week of the month (which may actually be at the beginning of the following month if, for example, the Friday of the last week of April is at the beginning of May.)

- **Address:** The address to which the tape/box is to be delivered to.
- **AM/PM:** The preferred time period at which you want the tape/box delivered.

A. Specify the desired pattern, including the address.
B. Click the "Add" button to create delivery dates according to the specified pattern.

3. Adding Delivery Dates From a List

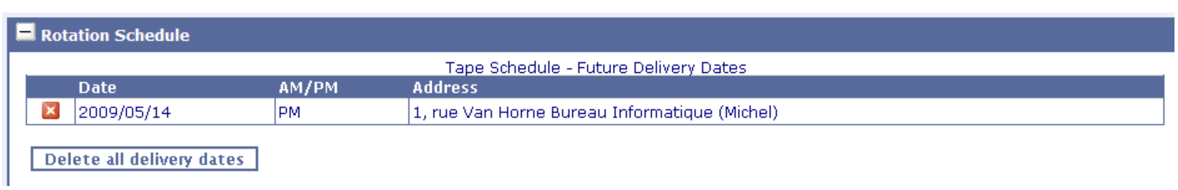
In the third section, you may type or paste in a list of delivery dates.



A. Select a date mask.
B. Type or paste in a list of dates, one per line, formatted to match the date mask.
C. Choose the address at which to deliver the item.
D. Select the preferred time period for the delivery.
E. Click the "Add" button to add the specified delivery dates for this item.

Viewing or Removing Delivery Dates

Once delivery dates are added, they will appear in the Rotation Schedule section as follows:



To delete a specific delivery date for the tape/box click on the red "X" next to the corresponding date. To remove all future delivery dates, click the "Delete all delivery dates" button.

3.9 Using the Work List

Work lists can be used to:

- Populate disposal lists.
- Add many items to a label print list.
- Permanently check out OUT items.
- Add all to order.

Viewing a Work List

1. Go in the search types drop down field and select "Work List".

2. Click on "Search". The current content of the "Work List" will be displayed.

Adding or Removing Items to/from a Work List

1. Locate the item(s) to add to the "Work List".

2. To add an individual item to the "Work List", click on the "Add to Work List" icon , either in a search result list or at the top of the record. The icon will change to indicate that the item is now on the "Work List".

3. To remove an item from the "Work List" click on the "This Item is in Your Work List" icon besides the item.

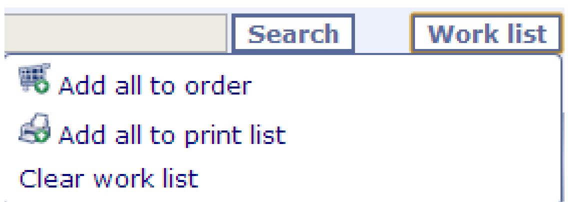
4. To add all items on a page of search results to the "Work List" at once, click on the "Add to Work List" icon for "All" at the bottom of the search results. Any item on that page that was not on the "Work List" will be added.

Note: If all items on the search result page are already on the "Work List", then the "This Item is in Your Work List" icon will be displayed, and clicking on it will cause all items on this search result page to be removed from the "Work List".

Clearing a Work List

1. Press on the "Work List" button at the top right and select the "Clear Work List" menu item.

2. All the items will be removed from the list automatically.



Adding a Work List to a Print List

1. Create and view a "Work List" (see above).

2. Click on the "Work List" button at the top right and select the "Add All to Print List" menu item.

3. The items on the "Work List" will automatically be added to the "Print List".

Adding a Work List to an Order

1. Create and view a "Work List" (see above).

2. Click on the "Work List" button at the top right and select the "Add All to Order" menu item.

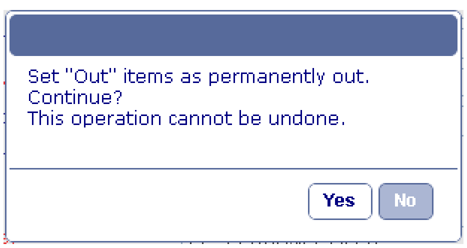
3. The items on the "Work List" will automatically be added to the order. You can view your order by clicking on "My Cart" tab.

Setting Items That are OUT to Permanently Out (DELETED Status)

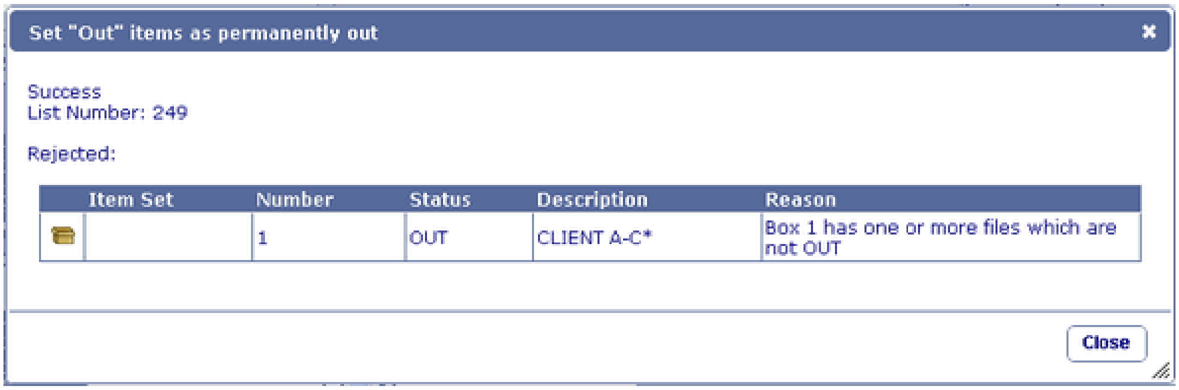
This action basically informs the record center that the items that are already "OUT" will stay at your location and will not return to the record center. The items will change from the "OUT" state to the "DELETED" state once the operation is accepted.

1. Create and view a "Work List" (see above)
2. Press on the "Work List" button at the top right.
3. From the menu that appears, select "Set "Out" items as permanently out".

4. A confirmation request appears.



5. If you want to go on with the process, press "Yes".
6. A message will appear, indicating whether the operation was successful, as well as the identity of any items that were rejected, along with the reason why these items could not be set as permanently out.



7. Items that were not rejected will have been transferred to the DELETED state.

Populating a Disposal List

1. Create and review a "Work List", ensuring that only items for disposal are on it.

2. Go in the **Disposal** tab.

3. Press on the "Create" button.

4. Select "Work List" in the Source field.

5. Enter a description for the list and select which "Disposal Mode 98" you want to use when processing the disposal.

6. Click on "Create List". A confirmation message appears, indicating whether or not a "Disposal List" was created.

7. The "Disposal List" will appear. If items were rejected, the items and reasons for rejection will appear over the list of items successfully added to the list.

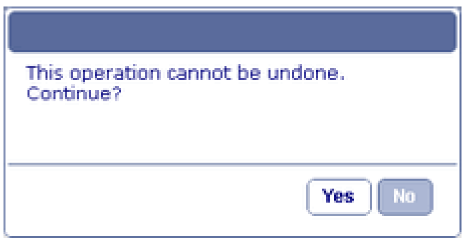
Note: Only items with the same "Disposal Mode 98" can be added to a "Disposal List".

3.10 Importing Information

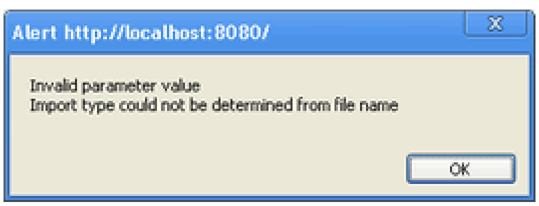
ActiveWeb enables you to import data from spreadsheets that match predefined templates. In order to activate this functionality, it is first necessary to establish templates for import with your record center and to have them associate these templates to your account. If you wish to be able to perform imports but the import button to the far right of the search area does not appear on the Inventory tab of ActiveWeb, please contact your record center.

Once the import functionality has been activated and you have data available in the template, perform the following steps to import it or watch the step by step video :

1. Go in the Inventory tab.
2. Click on the Import button, to the far right of the search area.
3. Choose an import file and press the Accept button.
4. A confirmation request appears:



5. Click "Yes" to continue. If an error message such as this appears:



This means that you may not have used a recognized template. Template names should start with the template number in square brackets.
(i.e. "[1]box data.csv" would tell ActiveWeb to attempt the import using the rules for template 1. Changing the "box data" part of the name would not affect the import, but changing the "[1]" part would result in the above message.)

6. The import will be processed and a summary of results will appear.

To have more information on the records that were skipped, click on "View Log".

Once the import is complete you may work with the records.
Note: It may take some time before all newly-added records are indexed for full-text search.

3.11 Documents Options

The following options are used to manage electronic documents associated to a file. After reading this section, you will be able to view, read, create, edit, email, finalize and delete documents. For a video tutorial, follow this link.

Note: This section appears in the Electronic Document Management version of ActiveWeb. Please contact your record center if you lack this functionality but would like to know more.

3.11.1 Adding a Document

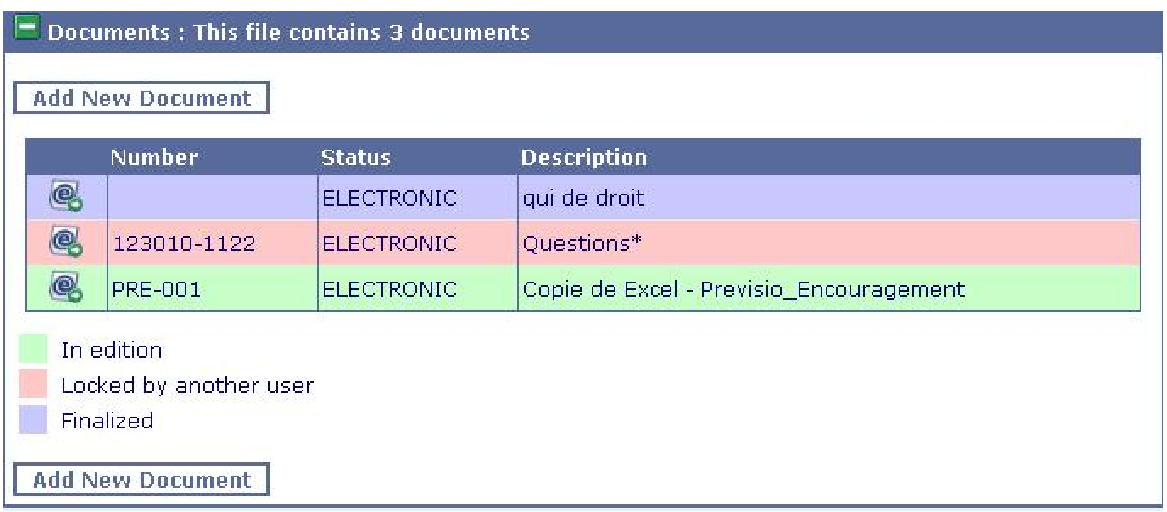
Before being able to manage electronic documents and edit them, you have to specify a work directory in the Options116 tab. This has to be done the first time you log in on a specific computer, or if you want to change directory to another one.

1. Search25 for a file.

2. Click on the "Document" icon from the tool bar:

Note: The number beside the icon defines the amount of documents associated with the file.

3. This will bring you down the page to the documents section:



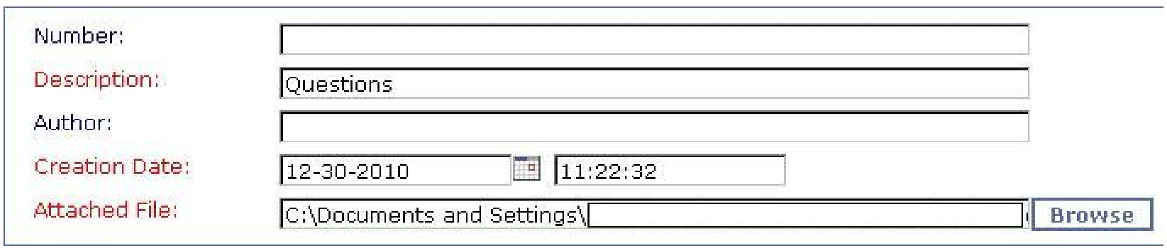
Note: When you are modifying a document, it appears light green. If it is being modified (locked) by another user it appears light red and if it has been finalized it appears light blue.

4. Click on "Add New Document". Click on "Browse", select an electronic document and click on

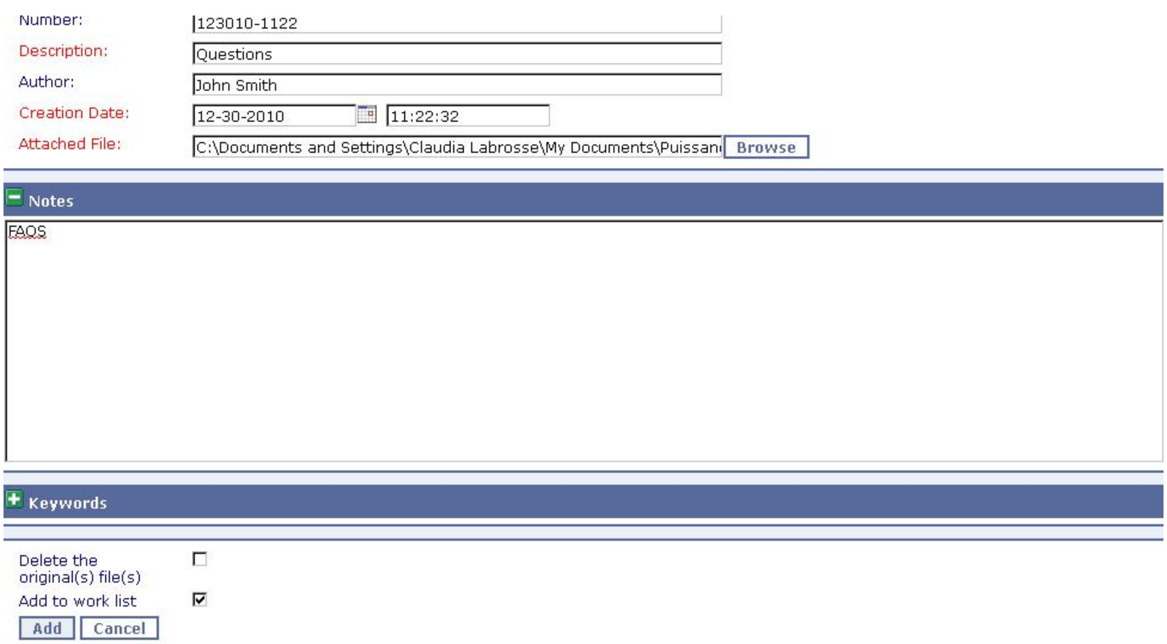
"Open".

Note: A document can be a file, a compressed file (e.g.: zip) or a folder. When a folder is added, its content cannot be emailed.

The compulsory information in red is automatically entered according to the file's information (when the fields do not have a drop down value). The field list is configurable under the **Configuration** tab, in the "Field Definitions - Document" section. If the information is not the one you wanted to save, edit it and fill the information for the rest of the fields 41.



5. To get rid of the original file on your computer, check the 'Delete the Original(s) File(s)' box. You can also add the document to the "Work List" by checking the associated check box. Click on the "Add" button.



A confirmation message appears after the document has been added to the app.

3.11.2 Description of Document Fields

Item Type
This read-only field qualifies the item as a document.

Status

This read-only field indicates that the item has the "ELECTRONIC" status.

RC (Record Center) Number
This is a read-only numeric field. It indicates the unique number automatically attributed to a document. It is used internally by the system for tracking purposes.

File
This is a read-only field that indicates the number of the file the electronic document is associated with.

Old Number
This read-only alphanumeric field can contain up to 16 characters. When a document number is modified, the old number is displayed in this field for reference.

Note: If the number is changed a second time (or more), the original number(s) will not be retrievable using a search by "Old Number". On the other hand, all "Old Numbers" of a document are saved in the document history, so entering the "Old Number(s)" under a "Full Text Search" would give you the result(s) you are looking for.

Registration Date
This read-only field indicates the first time a document was added.

Finalization Date
This read-only field indicates the date the document was finalized.

Document Type
This read-only field indicates the file extension of the document (e.g. doc, vsd, ppt, xls, etc.), thus revealing its type (e.g. Word, Visio, PowerPoint, Excel, etc.).

Number
This alphanumeric field can contain up to 20 characters (numbers and letters). This field contains the number assigned to the document. The following values are all valid: 100, 100-01-01, TB-00002.

Access level
This is a numeric field containing a value between "0" and "9" inclusively. Access Levels can be used to prevent unauthorized users from editing boxes with access restriction ("0" being the least and "9" the most restrictive access). When editing the field, the user can only assign a value less than or equal to his own level.

Note: If the Access Level of a user is less than the box access level, the user is not allowed to view, edit or order it.

Description
This is an optional alphanumeric field containing a maximum of 40 characters. This field contains the description of the item.

Author
This optional alphanumeric field can contain up to 20 characters. This field indicates to whom the document belongs to and is strictly for internal use for the customer.

Creation Date
This compulsory field is either automatically filled in when first selecting the document to add or it

can be entered manually before selecting a document. It indicates the date of creation of the electronic document (not to be confused with the registration date).

Field 1 / Field 2 / Field 3
These are optional alphanumeric fields of various lengths. These fields are typically either renamed for your own use or hidden. Fields 1-3 accept up to 20 characters and may be associated to drop-down lists of values.

Notes
This alphanumerical field is used to add notes to a document. When notes are expanded for view, by using the "+" sign, they will remain so for all documents viewed subsequently until they are collapsed by using the "-" sign.

When data is imported from a spreadsheet, if the data is too long for the field (e.g. the description field allows 40 characters), the first 39 characters of the data will be placed into the field, followed by an asterisk "*****". The full data will appear in the notes field (e.g. "DESCRIPTION: Cash vouchers for client no. 10202-002-01 [...]"). The "Notes" field is included in the full text search index.

Keywords
This alphanumerical field is used to add new keywords to an item. Keywords are very useful when using the "Full Text Search" (see Searching for a box or a file 25.)

History
This read-only field displays the history of the record, including all changes to the descriptive metadata fields as well as all touches of the document.

Versions
This section lists all the previous versions of the document. Each version can be opened for reading.

3.11.3 Viewing or Modifying the Information of a Document

1. Search 25 for a file.

2. Click on the "Documents" icon from the tool bar:

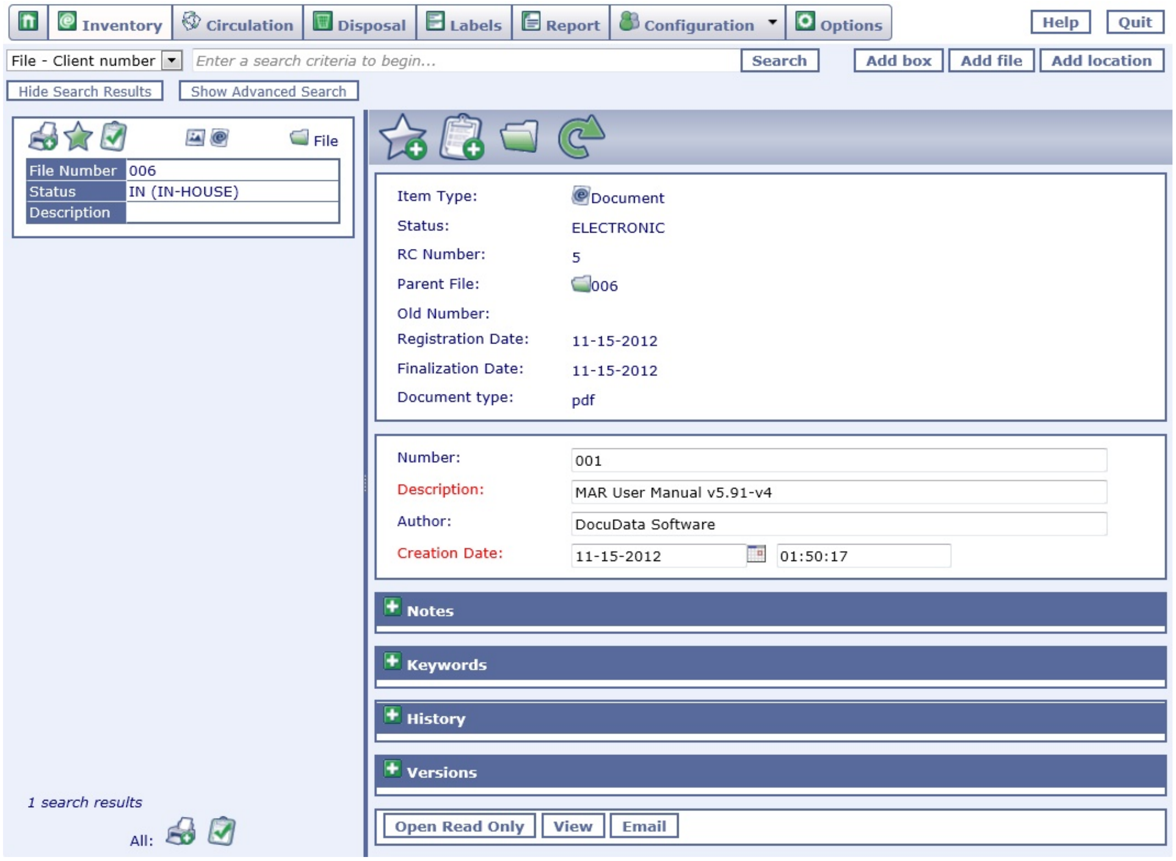
Note: The number beside the icon defines the amount of documents in the folder.

3. This will bring you down the page to the documents section.

4. Click on the document you would like to consult.

Viewing or Modifying the Information of a Document

This will bring you to the document's information.



Viewing Who is Modifying a Document

Scroll-down to the "History" section of the document and see which user has checked out the document for the last time.

History

Date	Time	Status	Comment	Data
11-15-2012	01:06:35	IN (IN-HOUSE)	SUPERVISOR, 1	
11-15-2012	03:22:07	IMAGES SCANNED	SUPERVISOR, 1	1 images
11-15-2012	03:22:49	IMAGES VIEWED	SUPERVISOR, 1	
11-15-2012	03:25:49	IMAGES SCANNED	SUPERVISOR, 1	70 images
11-15-2012	03:26:48	IMAGE INDEX CHANGE	SUPERVISOR, 1	
11-15-2012	03:27:57	IMAGES VIEWED	SUPERVISOR, 1	
11-15-2012	03:28:01	IMAGE INDEX CHANGE	SUPERVISOR, 1	
11-15-2012	03:29:05	ELECTRONIC	SUPERVISOR, 1	
11-15-2012	03:29:31	IN (IN-HOUSE)	SUPERVISOR, 1	

3.11.4 Viewing a Document

Viewing a document implies that the document will be opened in a viewer, which means that even if you do not have the application on your workstation (e.g. Microsoft Word) you will still be able to read its content.

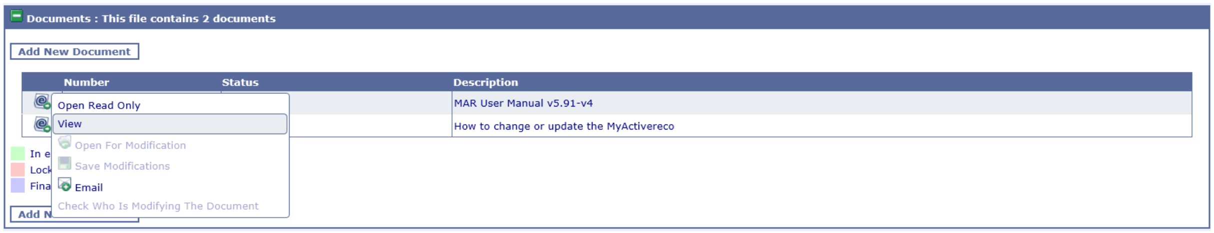
1. Search25 for a file.

2. Click on the "Documents" icon from the tool bar.

Note: The number beside the icon defines the amount of documents associated with the file.

3. This will bring you to the documents section.

4. Click on the "Documents" icon and select "View". This will automatically open the latest version in a viewer.

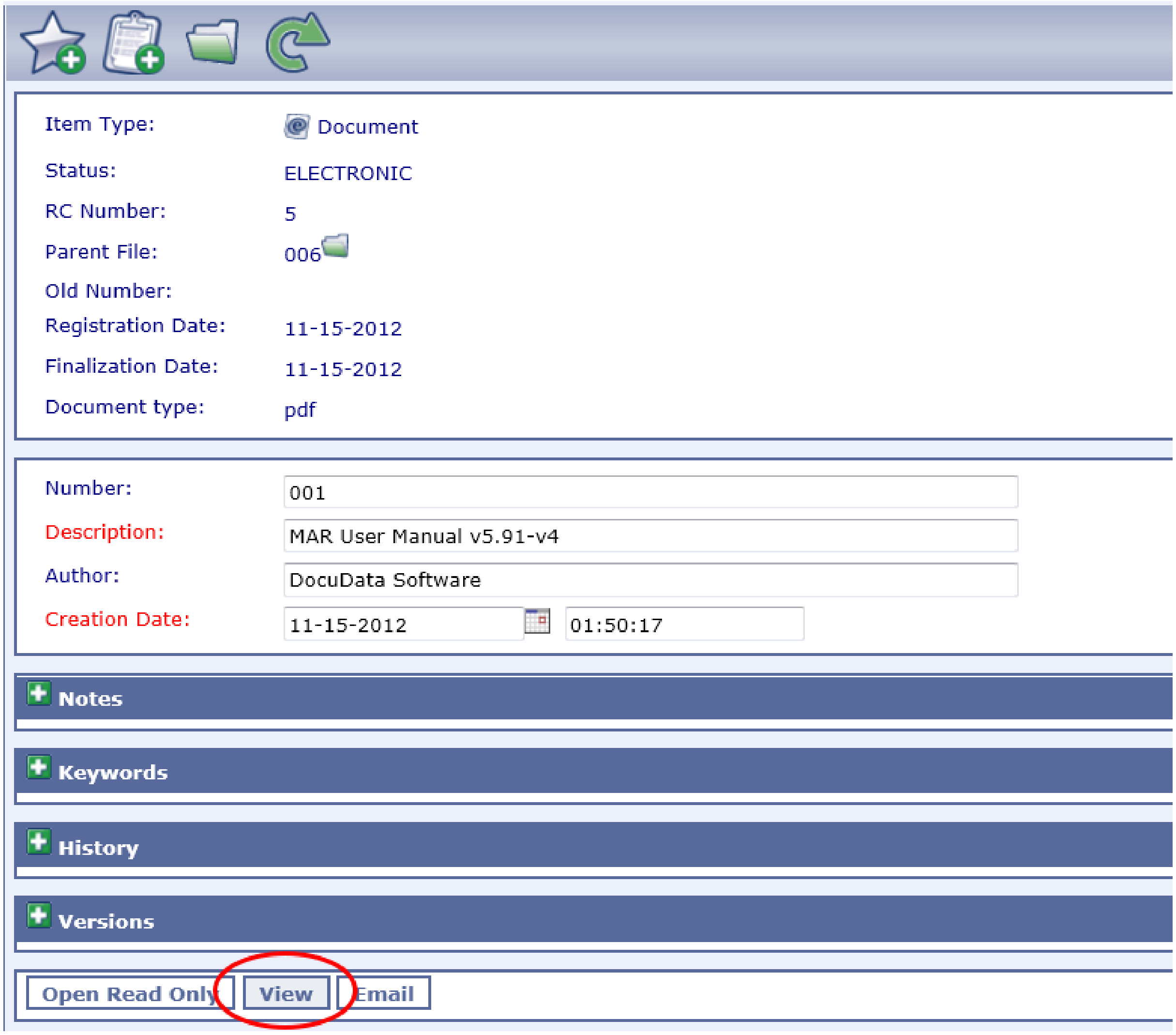


5. With this integrated viewer, you are now able to view PDF, Word, Excel and PowerPoint without any software installation on your computer. To close the viewer, click on the "X" at the top right corner of the window.

Note: The viewer can only open files smaller than 20 MB.

From the Document Window

1. If you have already selected the document and you want to view it from the window where all the document's information is, click on "View" at the bottom of the window.



2. When you are finished viewing the document, click on the "X" at the top right corner of the window.

3.11.5 Reading a Document

Reading a document implies that the document will be opened in the application itself (e.g. Microsoft Word), which means that the application needs to be installed on your workstation.

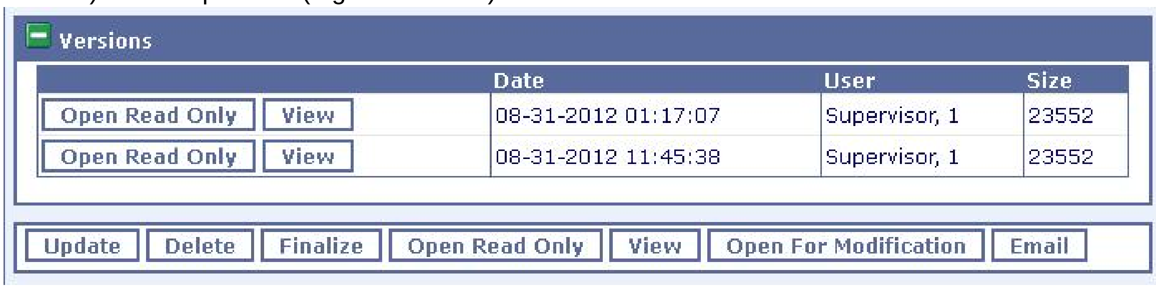
1. Search 25 for a file.

2. Click on the "Documents" icon from the tool bar:

Note: The number beside the icon defines the amount of documents associated with the file.

3. This will bring you to the documents section.

- *To read the latest version:* Click on "Open Read Only" at the bottom of the window. This will automatically open the latest version in read-only mode.
- *To read an older version:* Click on the desired document in the list. Scroll down to the "Versions" section and click on the "+" sign to open it. Click on "Open Read Only" beside the version you want to read. This will open the desired version in the document's original program (e.g. Microsoft Word) or the equivalent (e.g. RTF viewer).



3.11.6 Modifying a Document

ActiveWeb™ integrates with Microsoft Office applications. If you modify a document (see steps below) and save those modifications in the application, you have the ability to save or cancel those modifications in **ActiveWeb™**.

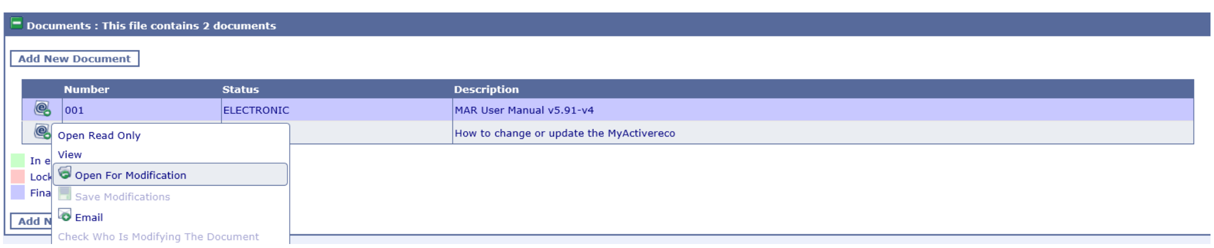
From the Inventory tab

1. Search 25 for a file.

2. Click on the "Documents" icon from the tool bar:

Note: The number beside the icon defines the amount of documents associated with the file.

3. This will bring you down to the documents section:



Click on the "Documents" icon and select "Open for Modifications". This will automatically open the latest version.

4. When your modifications have been made, save the document in the program before closing it. Click on "Save Modifications" at the bottom of the window. If you do not want your modifications to be saved, click on "Cancel Modifications".

If you do not press on any button, the document will remain in the "In Edition" status and will not be available for other users.

From the Document Window

1. If you have already selected the document and you want to modify it from the window where all the document's information is, click on "Open for Modifications" at the bottom of the window.

2. When your modifications have been made, save the document in the program before closing it. Click on "Save Modifications" at the bottom of the window. If you do not want your modifications to be saved, click on "Cancel Modifications".

If you do not press on any button, the document will remain in the "In Edition" status and will not be available for other users.

3.11.7 Finalizing, Emailing and Deleting a Document

1. Search 25 for a file.

2. Click on the "Documents" icon from the tool bar:

Note: The number beside the icon defines the amount of documents associated with the file.

3. This will bring you down the page to the documents section:

4. Click on the desired document, as seen in the previous window. Scroll down to the bottom of the page.

To Finalize a document

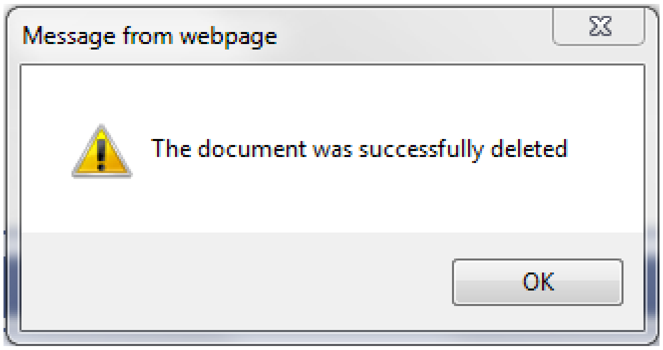
1. Click on "Finalize". This will make the electronic document non-modifiable. A verification message appears.

2. Press "Yes" to finalize the document. From that moment on it will only be available as "Open Read Only" and will not be available for deletion.

To Delete a document

1. Click on "Delete". The document will not be available for consultation or modification anymore. A verification message appears.

2. Press "Yes" to delete the document. A confirmation message appears.



Note : Finalized documents cannot be deleted.

To Email a document

1. Click on "Email". A new window will pop-up on top where you can enter email addresses, the subject of email and any notes you wish to attach to the email:

When you are ready to send the email you click on "Email".

Note: If you need to send the email to more than one recipient, separate the email addresses with a comma :
recipient1@domain.com, recipient2@domain.com, etc...

Note: The limit of recipients you can send the email to is not defined by **ActiveWeb™** but by your internet service provider.

3.12 Imaging Options

The following options are used to manage images within a file. You can view, create, email, import, scan and index images. For a complete video tutorial follow this link.

This tab is only available when using the Imaging version of **ActiveWeb™**.

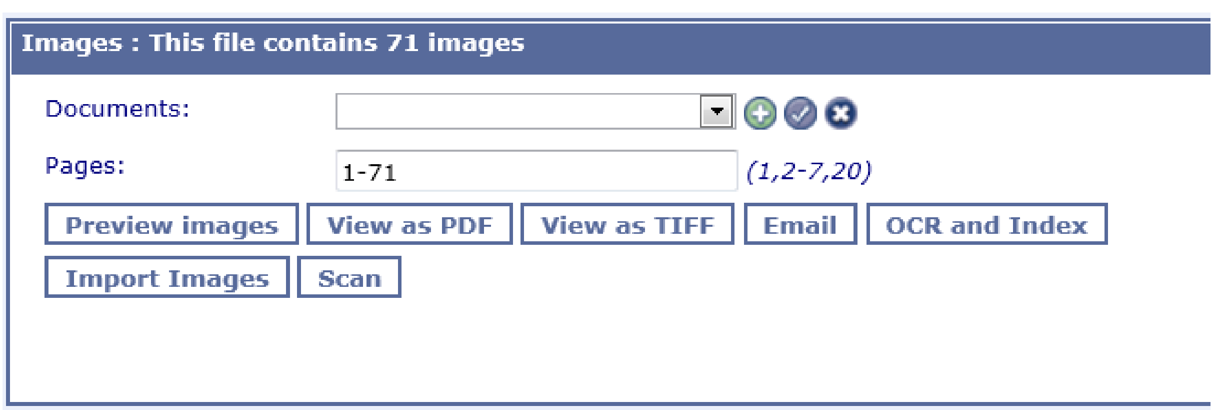
3.12.1 Viewing Images in a File

1. Search 25 for a file

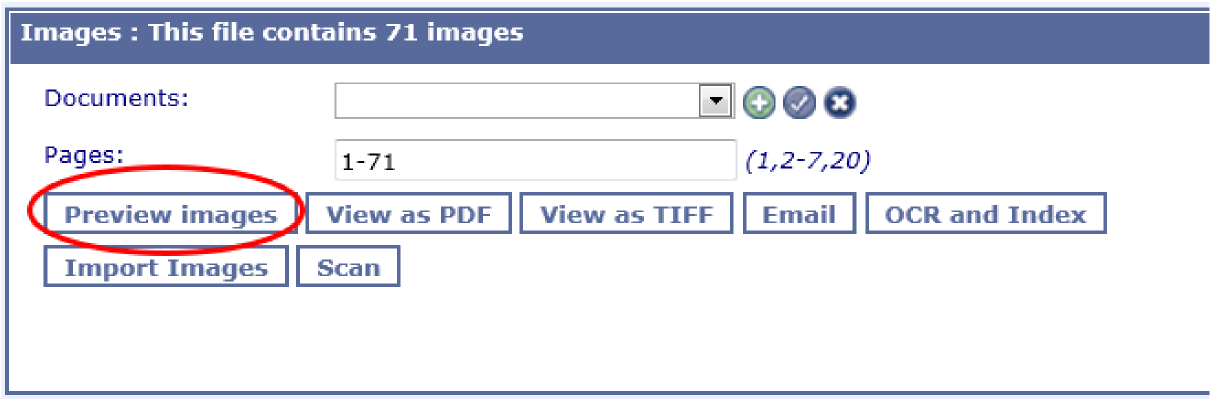
2. Click on the "Images" icon from the tool bar:

Note: The number beside the icon defines the amount of images associated with the file.

3. This will bring you down the page to the images section:



4. Enter an interval of images and/or a list of images separated by commas in the field. Be careful not to put any spaces between characters, otherwise an error message will appear. Click on "Preview images":

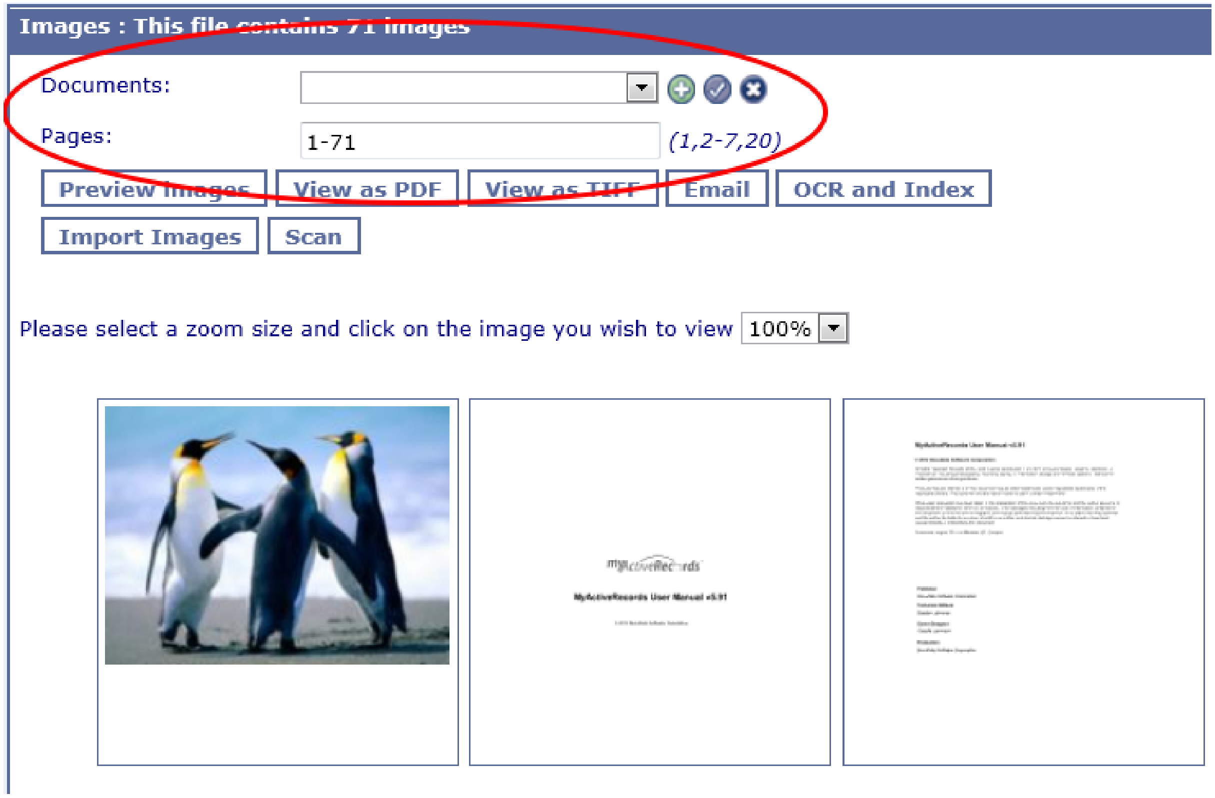


5. Select a zoom value and click on an image to view it. It will appear in a new window.

You can also view these as PDF or TIFF format by pressing the appropriate button. When viewing them in this format, a window appears showing the processing of images (ex: 2/6). You may decide to stop the process by clicking on 'Cancel'.

3.12.2 Creating a Document Index

This feature let's you group images into a document. This can be used to "map" the content of a file; it resembles a table of content and makes it easier to search and sort images included in the same file.



For example, in the picture above, the current file contains 71 images, or 71 "pages" of image. This means I can "index" groups of pages together using the following buttons:

To ADD a document index.

To EDIT an existing document index.

To DELETE an existing document index.

Let's index the first 5 pages as an example:
1. Click on 'Add' to start a new document index. A dialog appears:

All you have to do is enter the start and end page to be indexed and a description for the index.

2. Once you click on 'Accept', this new index will automatically be chosen in the "Documents" drop-down menu.

You can edit this same index by clicking on the "Edit"icon or delete it with the "Delete" icon . You can keep adding, editing and deleting your indexes until you are happy with the results.

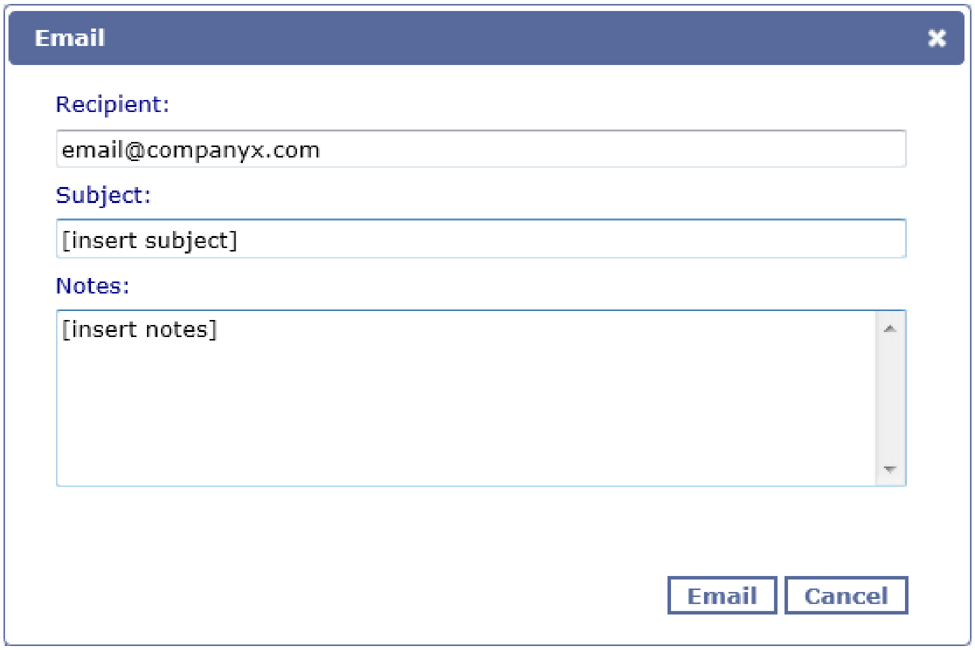
Note: When adding a new index or editing an existing one, be careful not to choose the same "end" page as an existing index. The value of the end page needs to be unique in order for the app to accept the modification or the addition.

Indexes can later on be used in full text searches 26 to quickly find images. Only the first image of the index is ' tagged' with the index's description.

3.12.3 Emailing Images

Images can be emailed to any valid email address. Enter an interval of images and/or a list of images separated by commas in the fields. Be careful not to put any spaces between characters, otherwise an error message will appear. Click on "Email".

A new window will pop-up. Enter recipient email addresses, the subject of the email and any notes you wish to attach to the email:



When you are ready to send the email, click on "Email".

Note: If you need to send the email to more than one recipient, separate the email addresses with a comma :
recipient1@domain.com, recipient2@domain.com   etc...

The limit of recipients you can send the email to is not defined by **ActiveWeb™** but by your internet service provider.

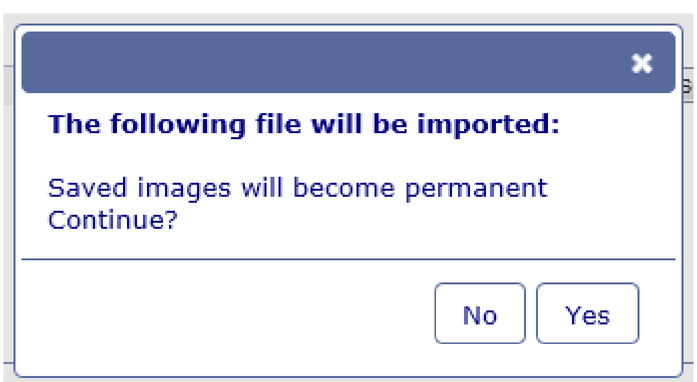
3.12.4 Importing Images Into Files

You can import images (one at a time) or pdf files by clicking on "Import Images":

Note: The formats supported are: tif, bmp, png, jpg and pdf. Take note that PDF is a complex format; such files should be handled as electronic documents.

Click on "Browse" in the dialog to choose an image or a pdf file from your computer. When a pdf file is selected you must select the color in which it will be imported (black & white or color). When all the information has been entered click on "Accept".

After clicking on "Accept", you will get a confirmation message:



Note: This dialog is an important part of the import process because once an image is imported it cannot be deleted unless the whole file is destroyed on a disposal list.

After clicking "Yes" on this dialog, the image will be appended to the end of the image list. So for example if you had 35 images in before importing a new one, the newly imported image will be located at # 36.

3.12.5 Scanning Images Into Files

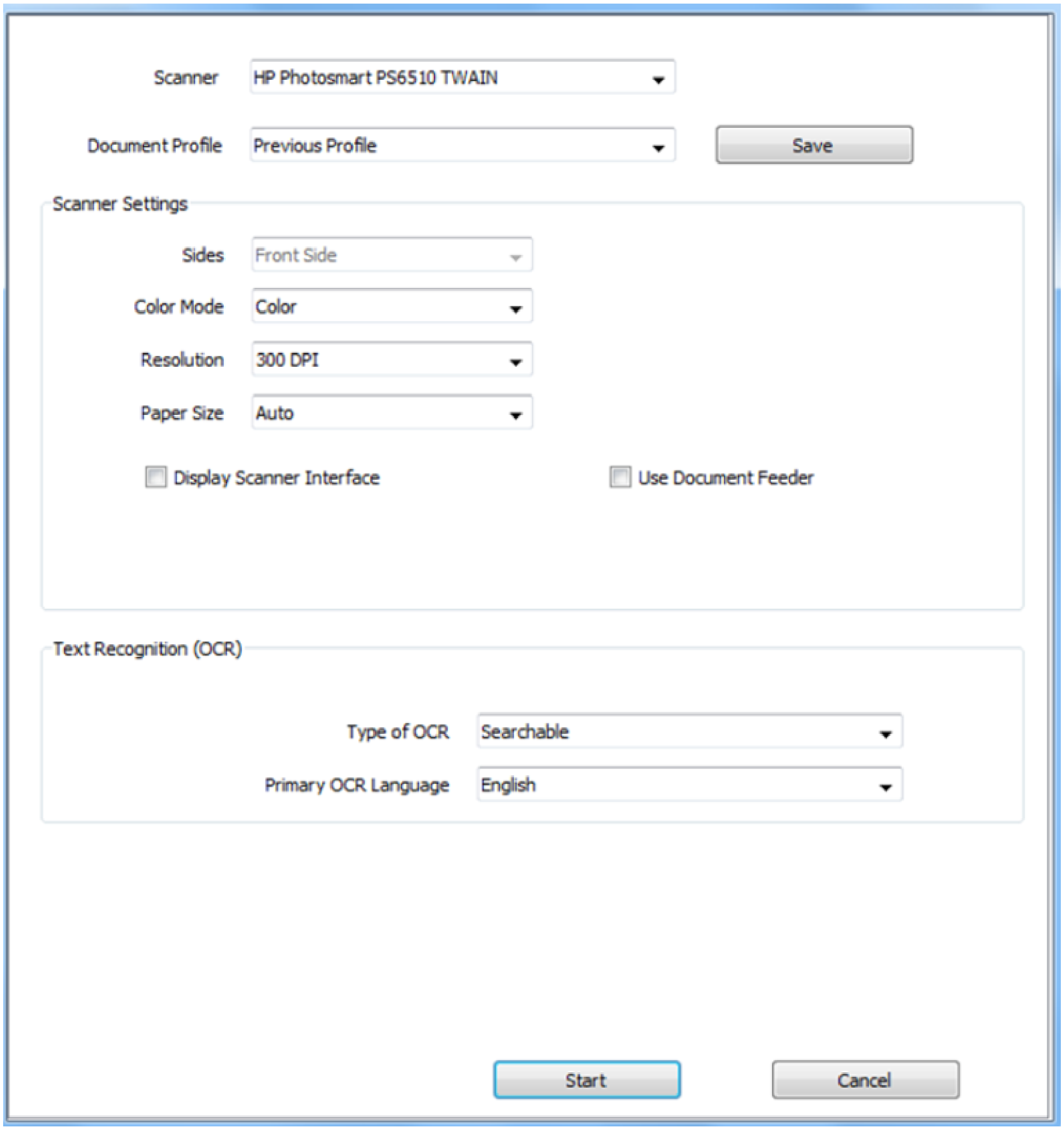
If you have a TWAIN-compatible scanner setup on your computer, you can scan images directly into files via **ActiveWeb™**.

Click on "Scan".

The scan window appears :

The first thing you should do here is to make sure you have your scanner selected and ready for scanning. As seen in the picture above you have to click on the "Scanner" icon to choose your scanner. If you do not see your scanner in this list please ask your computer administrator to make sure it is properly installed. **Note:** If your scanner does not have a compatible TWAIN driver installed, the scanning will not work.

Once your scanner is chosen open your scanner's interface. Here is an example:



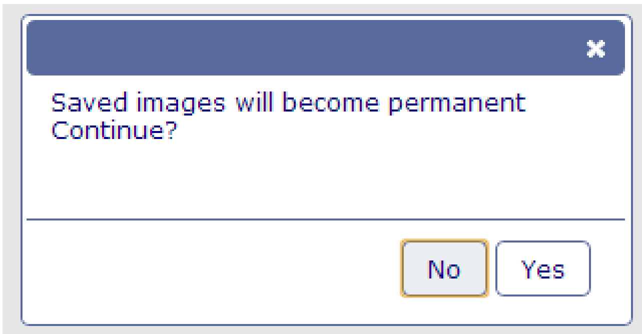
Every scanner has its own interface and might not look like the one you see here.

The scanner's interface might appear to not show up at all. It might just be that it is hidden behind another window so if you do not see your scanner's interface the first thing you should do is move or re-size the other windows on your screen to make sure it is not hidden.

Once you're happy with the scan settings you can start scanning your images by pressing the appropriate button on your scanner's interface. In the example here, I have to push the "Scan" button on the top right of the picture above.

Once the scanning is done you will see your scanned images.

You can select (see the check boxes in the picture above) any image from the list of shown images and rotate them if you need to with ,  and/or  rotation buttons and/or save them to the file. When you click on "Save" button you will be asked for a confirmation:



Note: This dialog is an important part of the import process because once an image is imported it cannot be deleted unless the whole file is destroyed on a disposal list.

After clicking "Yes" on this dialog, the image will be appended to the end of the image list. So for example if you had 35 images in before scanning these 2 images, the newly imported images will be located at # 36 and # 37.

3.12.6 Performing OCR and indexing

1. Search 25 for a file

2. Click on the "Images" icon from the tool bar:

Note: The number beside the icon defines the amount of images associated with the file.

3. This will bring you to the images section. Either scan 58 or import 56 a new image. Once this is done (or for existing images), enter an interval of images (using hyphens) and/or a list separated by commas. Do not to put any spaces between characters, otherwise an error message will appear.

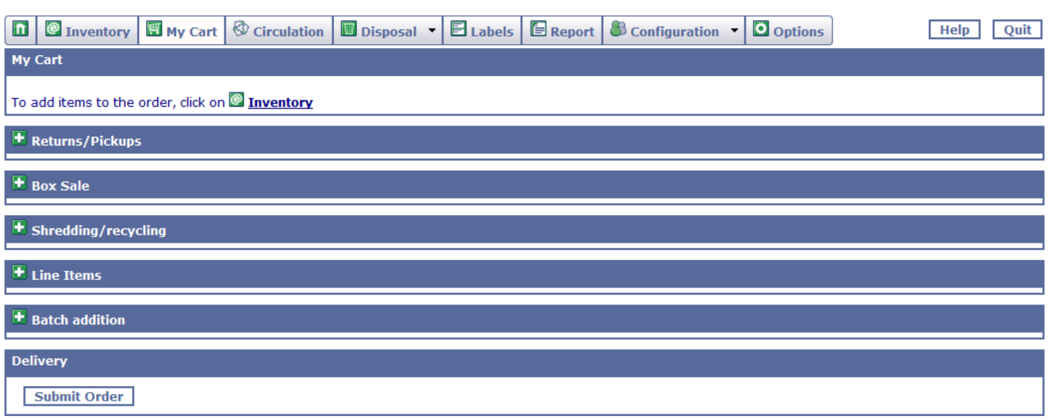
4. Press on the OCR and index button.

This process will recognize & index the words in the image, making those keywords available when using the full text search 26.

4 My Cart Tab

4.1 My Cart Tab Layout

When you first open the "My Cart" tab, this screen will appear (if you have not added anything to your cart yet):



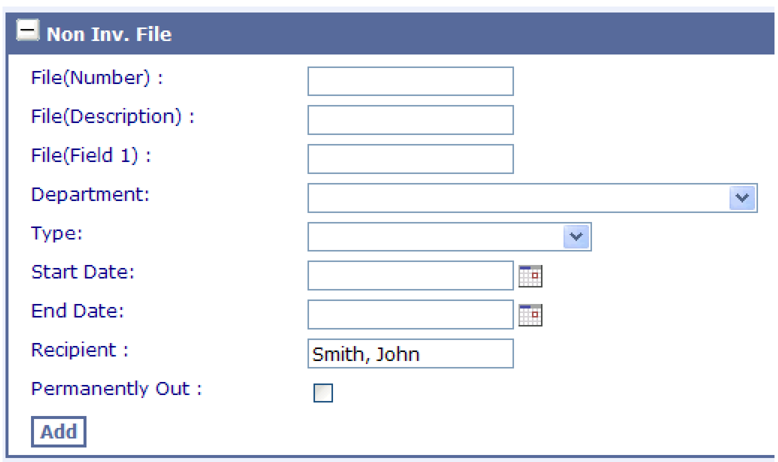
The description of different areas found on this page:

My Cart

This is the area of the page where items you add to your cart will appear. From this area you can delete items from your cart and/or specify extra information like the "recipient", the "return" or "permanently out" status to your order items. Here is a screen-shot to illustrate:

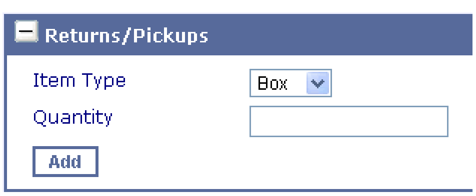
Non Inventoried File (Open-Shelf files only)

The Non-Inventoried file section is where you add a previously non-inventoried open-shelf file directly to the order, inventorying it at the same time. When the order is processed at the record center and if the file cannot be found it will be removed from inventory.



Return, Pick Ups

This section is used when you want the record center to pick up items from you. This is the simplest way to return boxes, files or tapes to the record center. It is assumed that the items are either already inventoried or that the record center does the data entry for you on arrival.



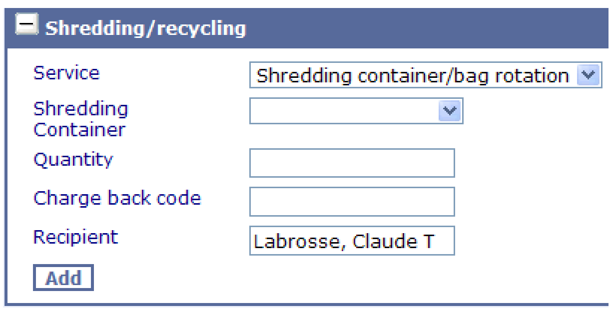
Select the item type and enter a quantity before pressing on the "Add" button.

Box Sale

This is used to order new boxes from the record center. enter the quantity, the department the boxes will be billed to and change the recipients name who will receive the boxes.

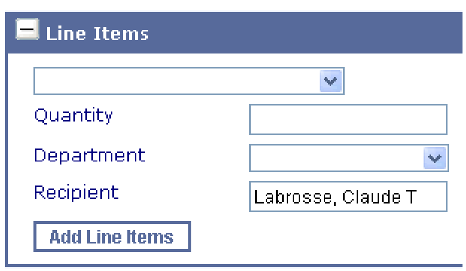
Recycling Bin Rotation

This section will be displayed when your record center offers shredding or recycling services. First, you need to select the type of service you need (either rotation or emptying), then you need to select the container from the list of container types. Enter the quantity, the charge back code or department (it depends on the way you are billed) and edit the recipient (if needed). Click on the "Add" button when all the information has been entered.



Line Items

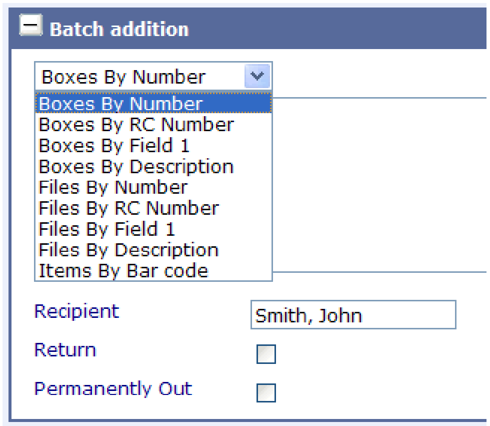
The Line Items section is where the record center offers different items for sale and/or services other than just box and file retrievals. Most likely these items or services will be listed here. Select the item, enter a quantity, select a department and change the recipient name needed.



Batch Addition

The Batch Addition section is where you add many boxes and/or files onto the order at the same time. So whatever criteria you choose to use make a Batch Addition, make sure there is only one criteria per line. In the case of numbers for example, you would just enter one number per line as in as in this example:

1
2
3
etc...



Delivery
This is where you choose which delivery type to use for your order and the address to which you want those items delivered. You can also enter special instructions to your record center there also if needed.

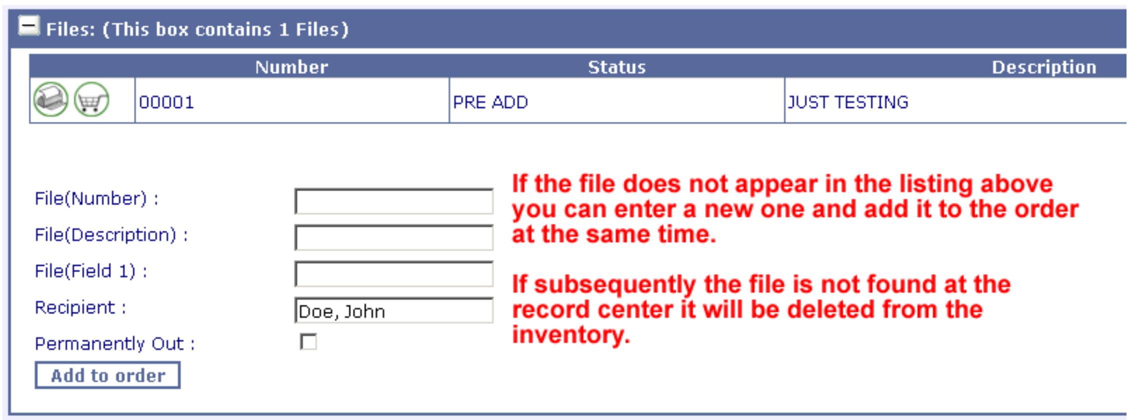
4.2 Placing an Order to Your Record Center

Placing an order to your record center is easy. There are a few different ways to accomplish this task depending on what you want to order or be returned.

Scenario 1: Order from Searches
One common way to place items on an order is to first "search" 25 for the item you need and then place it on the order. To place it to the order press the little shopping cart icon at the top of your item's detailed view. The icon will pass from this  to this  when added.

If you want to order a non-inventoried file from a box, you first "search" for the box itself and then click on the "file" icon in the box module like this:

When you click on the file icon, the screen will move to the file section of the box like this:



Here the image states, you first need to make sure that the file is not already listed in the box. If it is, then you add it to the order by pressing the shopping cart icon . If the file is not on the list then you add it to the box and order at the same time by filing the necessary fields to identify it and click the "add to order" button to add it to your cart.

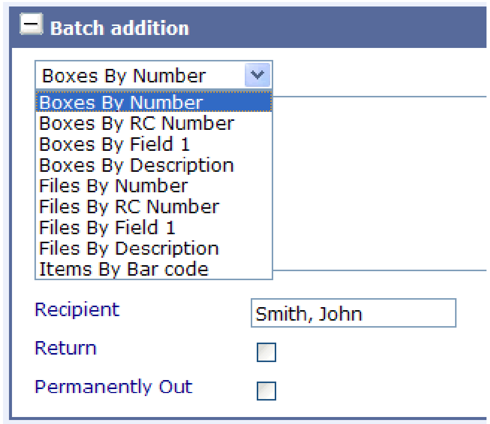
You repeat the same steps to keep adding items to your "cart". Once you are done adding items you can browse the "My Cart" tab where you will find one line on your cart for each item that you placed. The line will look similar to this:

From here you can fine tune some of the parameters like the recipient, whether the item is to be returned to the record center or if you plan to keep it at your location indefinitely after delivery (permanently out). You can also modify the charge back code (this may not apply to you). To delete an item from your cart press the red "X" on the left side of the item.

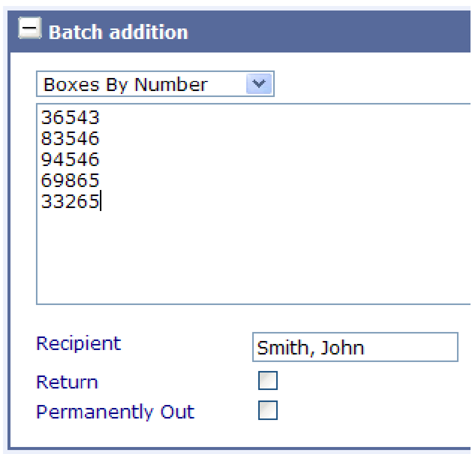
Once you are satisfied with the items on your order you can Specify Your Delivery Options and Submit Your Order 69 to your record center.

Scenario 2: Order Via a Batch Addition

Another quick way to place an order where you already know either the Box or File Number, RC Number, Bar code, Description or any other field indicated in the drop-down menu listed in the screen-shot below.



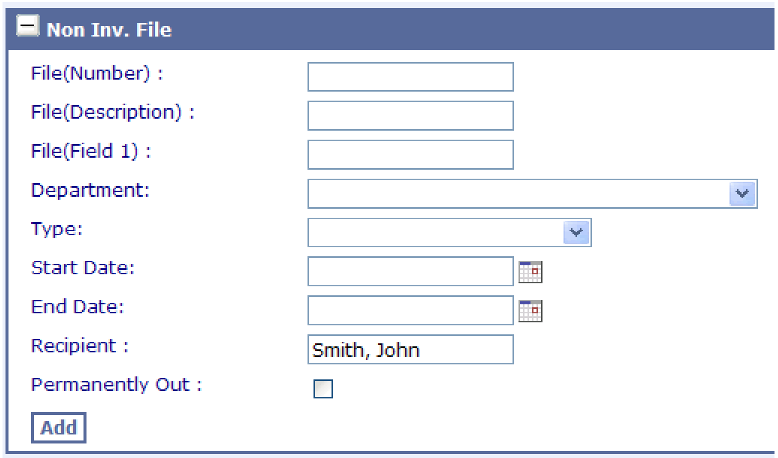
Then all you have to do is list the numbers (or any other field info) on a line of its own in the area under the drop-down. You can choose the standard options: Recipient, Return & Permanently Out if needed.



Once you are satisfied with the items on your order you can Specify Your Delivery Options and Submit Your Order 69 to your record center.

Scenario 3: Ordering Non-Inventoried Files (Open-Shelf Files Only)

Use this section if you want to add an open-shelf file to your order which is not inventoried into the system yet. It is assumed that you know personally that the file really exists. When the order is processed at the record center, if the file cannot be found it will be removed from inventory.



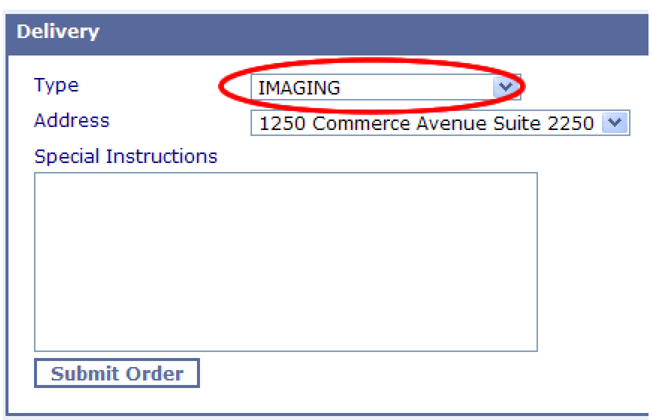
Once you are satisfied with the items on your order you can Specify Your Delivery Options and Submit Your Order 69 to your record center.

Scenario 4: Ordering Imaged Documents (Imaging on Demand)

You can request files to be imaged by your record center for later viewing in ActiveWeb. Here's how you proceed:

1. Search 25 for the files to be imaged or added directly to your order if you have the paper information.

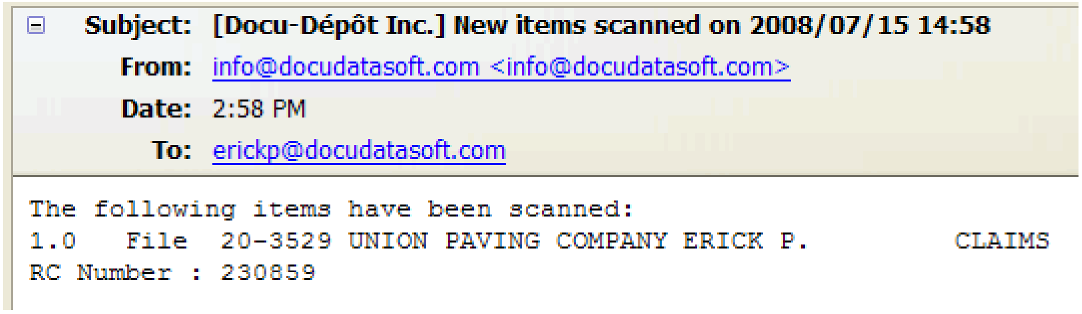
2. On the "My Cart" page, in the delivery section, make sure you choose a delivery type that relates to "imaging" as shown in the screen-shot below:



Note: Your particular imaging delivery types available from your record center might be called something different than what is mentioned here. You might not have access to any of these as well. If in doubt, contact your record center.

3. When you are ready, just click on the "Submit Order" button to send your order.

4. When your record center is finished processing the order, you will receive an email (similar to the one below) indicating that your file is now available for viewing in ActiveWeb and will also tell you which RC number to find it with.



5. You can go then into ActiveWeb and look 51 at the image(s).

Scenario 5: Ordering Other Items & Services

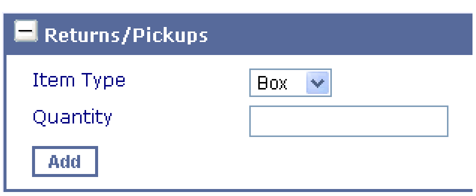
Sometimes your record center offers different services or other items other than your regular boxes and files. These can be ordered from this section. The "Line Items" drop-down menu lists all the items and services available to you.

To add an item or service you select it from the drop-down menu, indicate a quantity, select a department to be billed to and add the recipient's name to whom it will be delivered then press the "Add Line Items" button like in the screen-shot below:

Once you are satisfied with the items on your order you can Specify Your Delivery Options and Submit Your Order 69 to your record center.

Scenario 6: Returning Items to the Record Center

use this section if you want the record center to pick up items from you. This is the simplest way to return boxes, files or tapes to the record center. It is assumed that the items are either already inventoried or that the record center does the data entry for you upon arrival. In either case, the items should already have a bar coded label on them. You obtain these labels from your record center ahead of time.

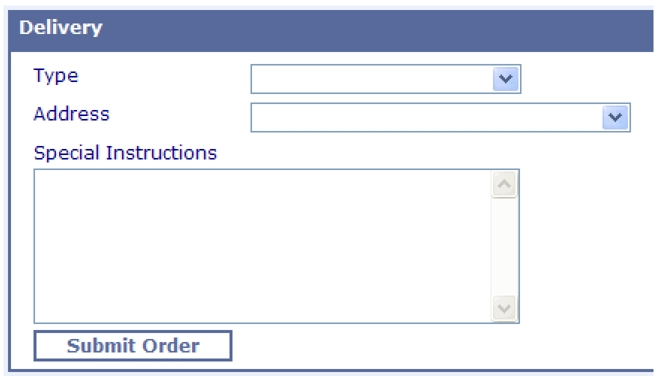


select the item type you want to send to the record center, enter the quantity and click the "Add" button.

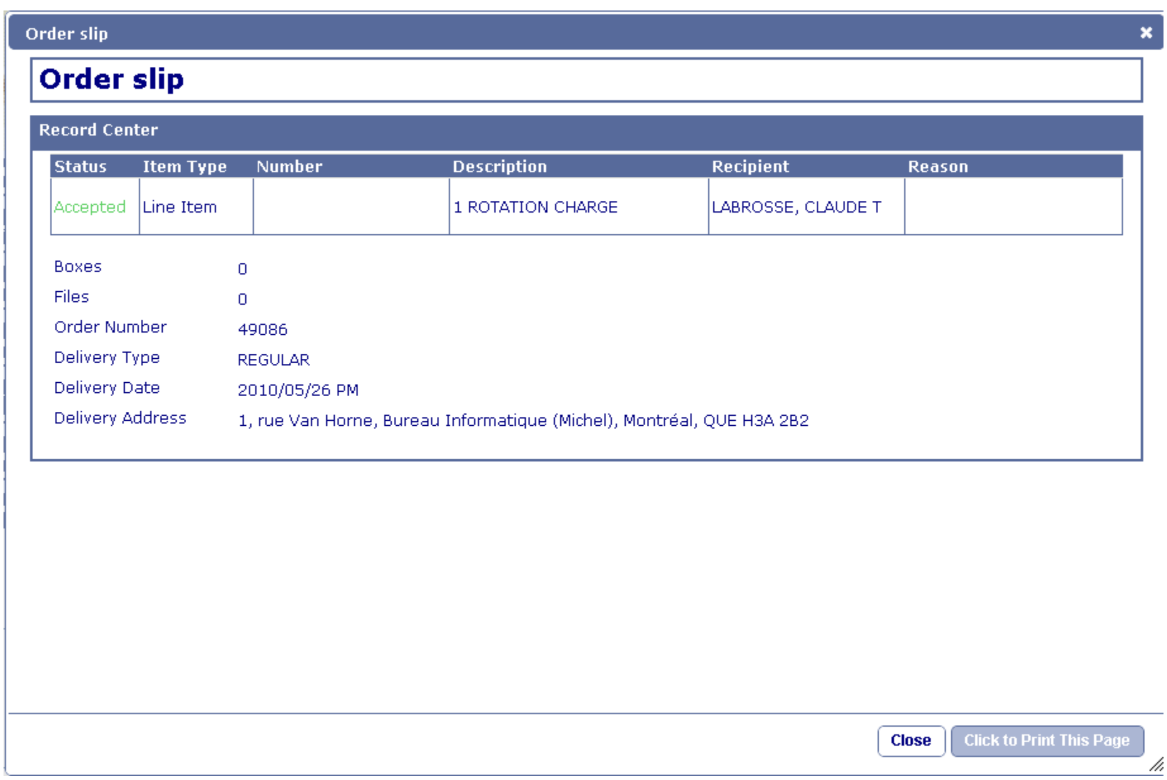
Once you are satisfied with the items on your order you can Specify Your Delivery Options and Submit Your Order 69 to your record center.

Specifying Delivery Options and Submitting Your Order

Before you can submit your order to the record center you need to specify the "delivery type" and select which address you want your order sent. If you want to enter any special instructions to the record center to accompany your order you can do this in the box provided:



Once you have chosen your delivery parameters you can click the "Submit Order" button to place your order with your record center. Once the order is placed successfully you will presented an "order slip" similar to the one below which you can choose to print if you want to.



The Order Slips screen indicates:

- the status of the order (Accepted or Rejected);
- the item type;
- the file number, the box number and the Field1 of the box;

- the description of the file or box;
- the recipient and
- the reason, if the order was rejected.

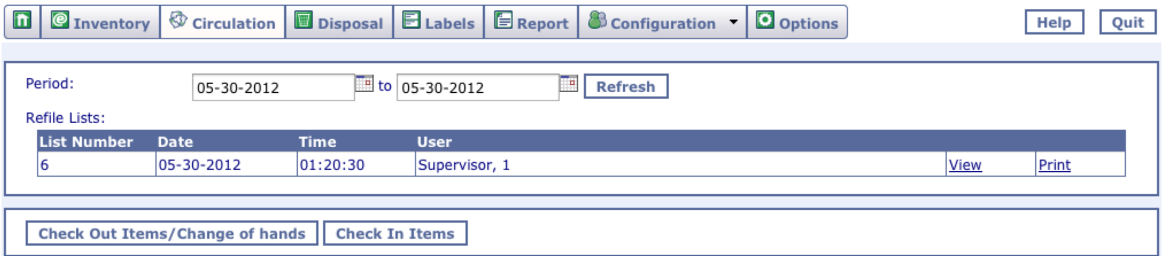
Note: Any item can be put on the cart, even In-House items. Although these items will be sent on an in-house picking list so the picking clerks at your office will be able to process the order and send it to you. The order confirmation report will show which items will be coming from in-house locations. For more information please consult the Picking Lists and Refile Lists 74 topic.

If you have different delivery scenarios of your own which are not described in this manual, please contact your record center for additional information.

5 Circulation

5.1 Circulation Tab Layout

When you first open the **Circulation** tab, you are presented with the following screen (if no refile list has been created):



Here is a short description of each element present on this screen:

Period
These calendars let you enter a date range for viewing "Refile Lists".

Refile Lists
A "Refile List" is created automatically when items are checked "IN".

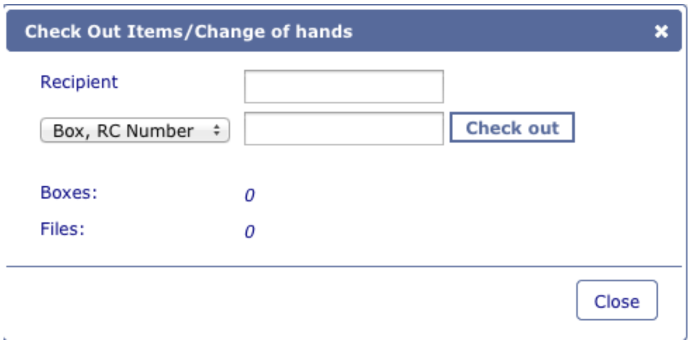
Check Out Items or Change of Hands
This button will let you check "OUT" items (i.e. telling the system a recipient is taking possession of the file or box from its previous recipient) using a wedge scanner or by entering the RC Numbers of items.

Check In Items
This button will let you check "IN" items (i.e. telling the system a recipient is bringing the file or box back to a designated location which makes it available to other users.). This is done by scanner or entering the RC Numbers of the items.

5.2 Check Out Items

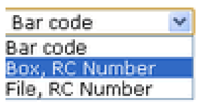
Checking Out is when an item is “IN” your on-site file room (IN-HOUSE) and you want to take it “OUT” to your possession. This process indicates that the items goes from the office file room to a recipient.

1. Press on the "Check Out" button. The following screen appears:



2. Enter a Recipient 109.

3. Select the way the information will be entered (e.g. Bar code, Box RC Number, File RC Number). If you have a scanner, it will be faster if you select "Bar code".



4. When using bar codes, scan the box or the file's bar code. When entering RC Numbers, start by selecting which type of item you will check out first (e.g. boxes), enter all the RC Numbers for this item type. If need be, repeat the same step for another type of item (e.g. files). Every time you enter a RC Number, press the "Check Out" button below.

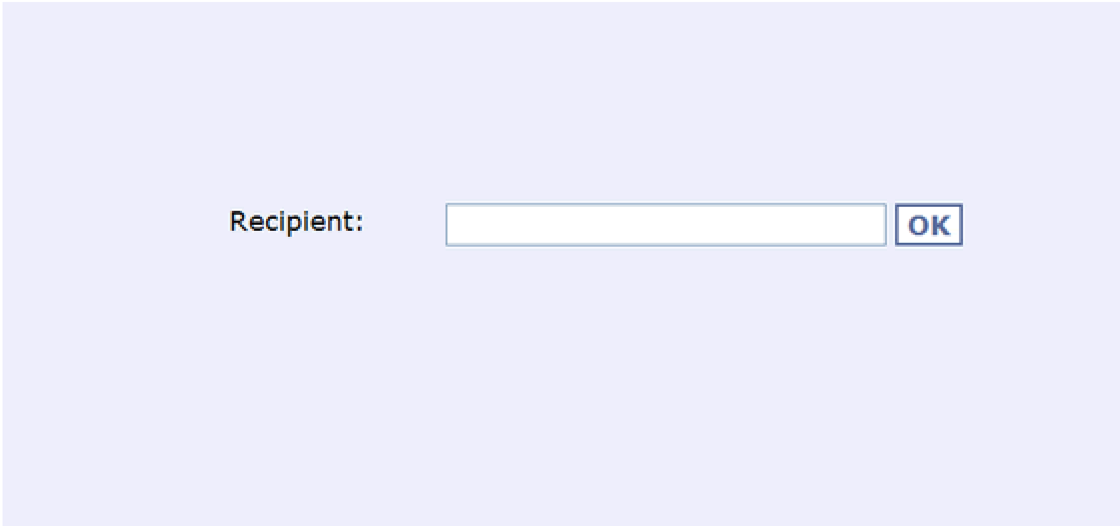
5. At the bottom of the window, a summary of "Items Checked Out" will be updated every time an item is checked "Out". When all items have been checked out, press "Close".

5.3 Checking OUT Items in Terminal Mode

The Terminal Mode is a basic screen that lets end users (recipients) easily check out items. This is normally used in a file room to facilitate the work of file room clerks and lets them take care solely of the picking, refiling and checking in of items.

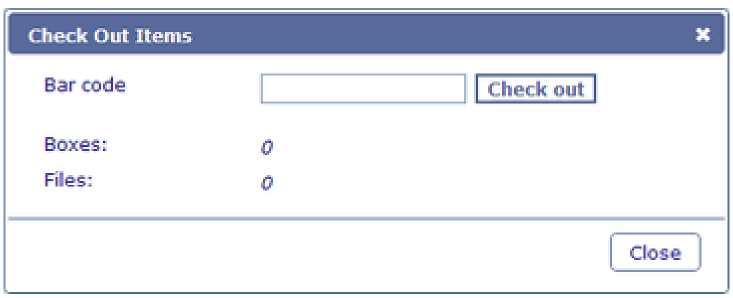
1. Access the terminal mode by entering the correct address: http://<ActiveWeb address>/terminal
Note: The customer must have a web license with the 'Active' option (that enables them to manage in-house documents).

2. Login 7 to the web normally. The following screen appears:



Note: The user opening the terminal must have edit rights to the Circulation tab.

3. Enter the name of the recipient entirely (or partially and select it in the list) and press "OK". The following screen appears:



4. Scan the item(s) one by one with the wedge scanner attached to the work station or enter the bar code manually and press Check out (the bar code is usually at the bottom of a label and resembles this: 1J 111 250000).

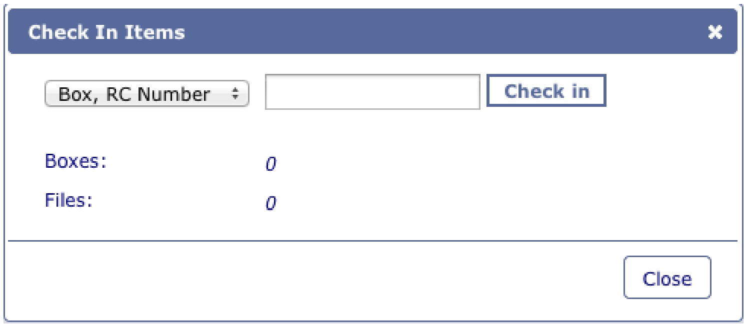
If the bar code has not been entered properly the following error message will appear:

5. At the bottom of the window, a summary of 'items checked out' will be updated every time an item is checked out. When all items have been checked out, press *Close*.

5.4 Check In Items

Checking "In" is when an item is in your possession (e.g. "OUT (In-House)") and you want to make the item available again to other users. This process indicates that the item goes from your possession to its home location (i.e. file room, cabinet, etc.).

1. Press on the "Check In" button. The following screen appears:



2. Select the way the information will be entered (Bar code, Box RC Number, File RC Number). If you have a scanner attached to the workstation, it will be faster if you select "Bar code".

3. When using bar codes, scan the box or the file's bar code. When entering RC Numbers, start by selecting which type of item you will check "In" first (e.g. boxes), enter all the RC Numbers for this item type. If need be, repeat the same step for another type of item (e.g. files). Every time you enter a RC Number, click on the "Check In" button below.

4. At the bottom of the window, a summary of "Items Checked In" will be updated every time an item is "Checked In". When all items have been processed, click on "Close".

5. A "Refile List" will automatically be created to help keep track of items to refile and facilitate the refiling of items.

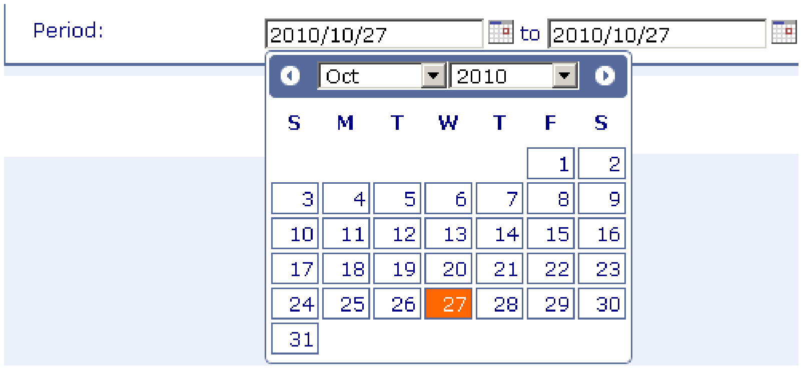
5.5 Refile Lists

PICKING LIST

A Picking List is created when a user orders an item that has the IN (IN-HOUSE) status. This type of list is designed for the office clerk in the file room; it accelerates the picking process by organizing the items to be picked. Once an item is picked, the clerk "Checks OUT" the items for the Recipient 109 or the recipient checks it OUT himself. For more information about this procedure, consult the Check OUT Items 71 topic.

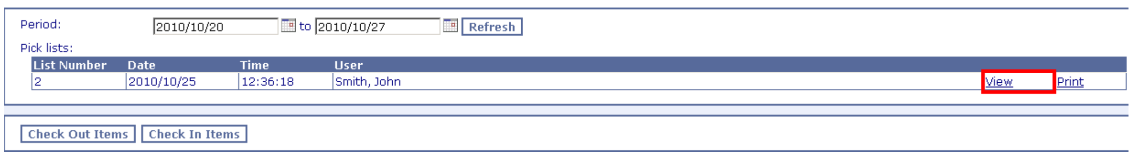
To View a Picking List and Mark Items as Picked

1. Enter a date range in the period fields (from/to) by using the calendar icons to select the proper dates.

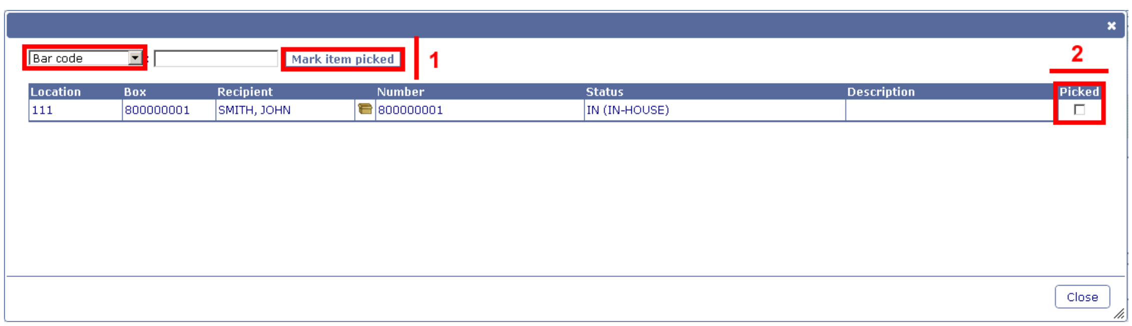


Note: The date range cannot exceed a month. Put in the first date and click in the second date field, the system will automatically put in the maximum date permitted.

2. Press on the "View" option at the extreme right of the list you want to view.



3. The following screen appears:



There are 2 ways of indicating that the item is leaving its location:

1) First, select one of the following options: Bar code, Box RC Number or File RC Number. Then, scan the bar code with a wedge scanner or enter the RC Number and finally press on the "Mark Item Refiled" button. This is very useful when the list of items is extensive.

2) Check of the "Picked" check-box beside the item. This is normally used when you have very few items on your list.

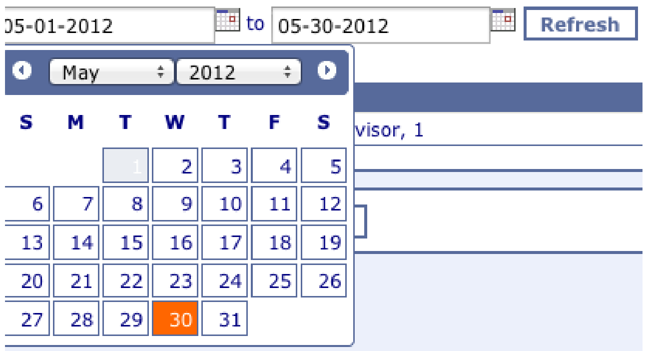
When all items have been picked, press "Close".

Refile List

A "Refile List" is created when a Recipient 109 or the office clerk checks "IN" an item that has the "OUT (In-House)" status. This type of list is designed for the office clerk in the file room; it accelerates the refiling process by organizing the items to be refiled. For more information about checking "IN" an item consult the Check IN Items 74 topic.

To View a Refile List and Mark Items as Refiled

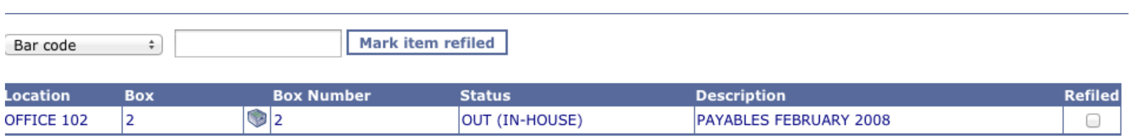
1. Enter a date range in the period fields (e.g. from/to) by using the calendar icons to select dates.



Note: The date range cannot exceed a month. Put in the first date and click in the second date field, the system will automatically put in the maximum date permitted.

2. Click on "View" option at the extreme right of the list you want to view.

3. The following screen appears:



There are 2 ways of indicating that the item is back in its location:

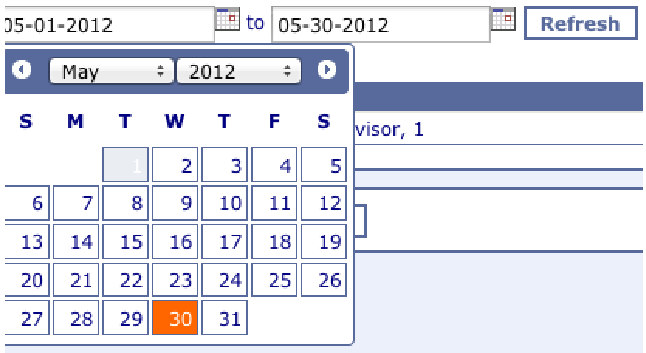
1) Select one of the following options: Bar code, Box RC Number or File RC Number. Then, scan the bar code with a scanner or enter the RC Number and finally click on the "Mark Item Refiled" button. This is very useful when the list of items is extensive.

2) Or check off the "Refiled" box beside the item. This is normally used when you have very few items on your list.

When all items have been refiled, click on "Close".

To Print Any List

1. Enter a date range in the "Period" fields (from/to) by using the Calendar icons to select dates.



Note: The date range cannot exceed a month. Put in the first date and click in the second date field, the system will automatically put in the maximum date permitted.

2. Click on "Print" option at the extreme right of the list you want to view.

Refile Lists:

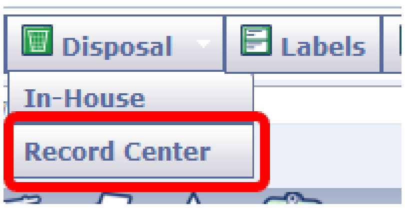
List Number	Date	Time	User		
6	05-30-2012	01:20:30	Supervisor, 1	View	Print

3. The report will be opened in a new window in PDF format.

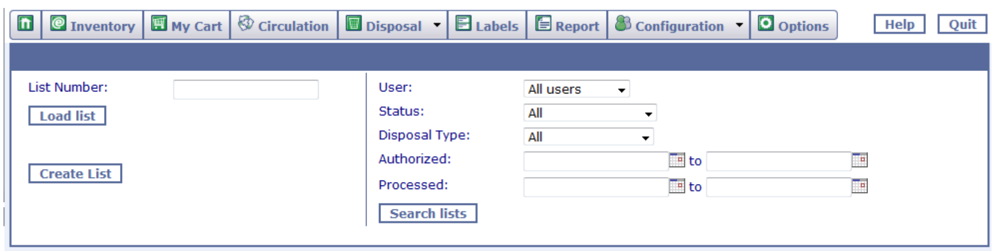
6 Disposal Tab

6.1 Record Center Disposal Tab

You can now manage disposal lists in ActiveWeb. To access disposal lists for boxes at the Record Center, click on the Disposal tab and choose the Record Center option.



Here's what you first see when you enter the "Record Center Disposal" tab in ActiveWeb:

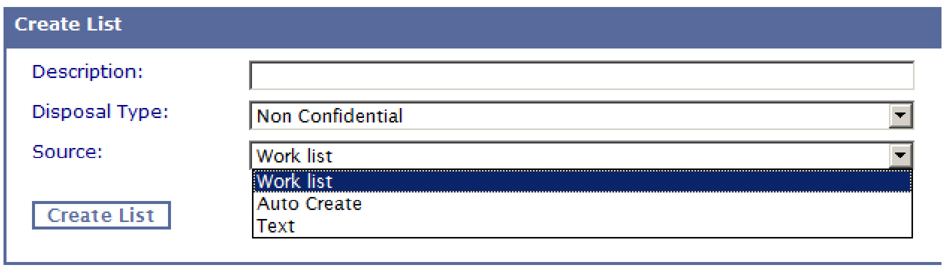


Here you can load or search existing lists and create new lists from scratch. The following pages will show you how to effectively use the Record Center disposal module in ActiveWeb.

6.1.1 Creating a New Disposal List for RC

1. To create a new disposal list, click on the "Create List" button as seen below:

The window expands to show you the list creation form:



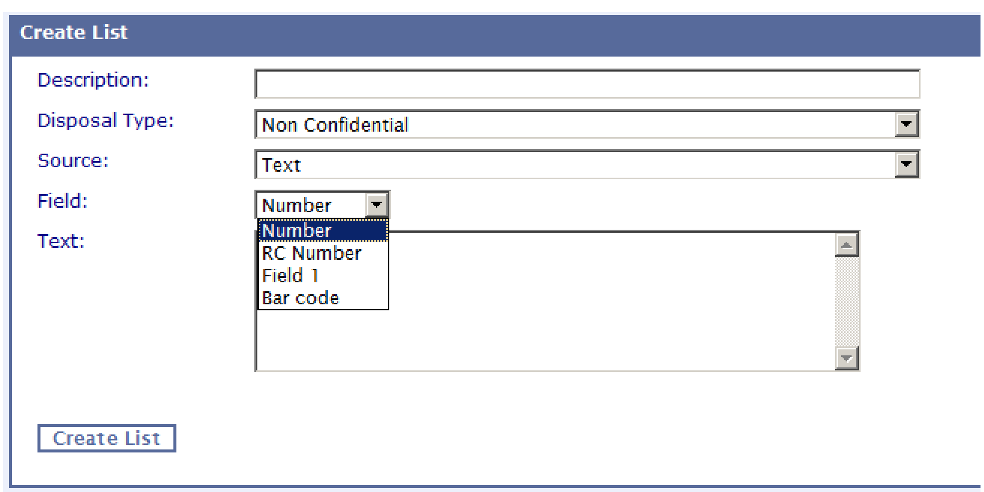
2. Select the way you will create the list from the following:

From a Work List

In order to create a work list please consult the following topic: Using the Work List 36. Once your work list is created, see step 3.

From a Text Source

If you choose to create the list via the "text" source then you will have to choose by which kind of text field you wish to populate the list as shown in the screen-shot below:



You can now choose from 4 different fields to enter your data (Box Number, Box RC Number, Field 1, Bar Code). You can only populate your list with one type of field at any one time. You cannot enter some data as "Box Numbers" and others as "Bar Code" for example.

When entering data in the "Text" field, you "HAVE" to enter one item per line:

148
149

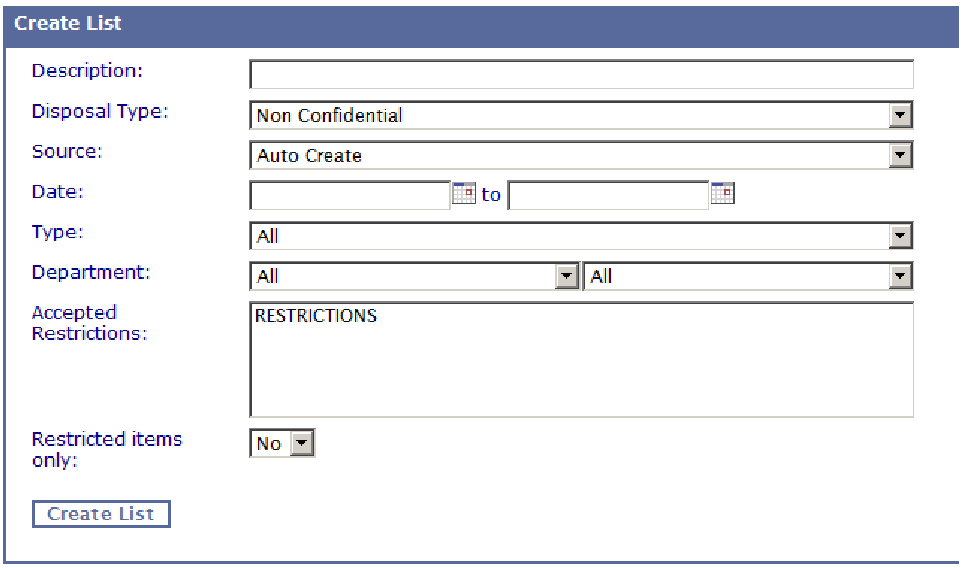
as opposed to having them on the same line (separated by commas):

148,149

Having them on the same line WILL NOT work.

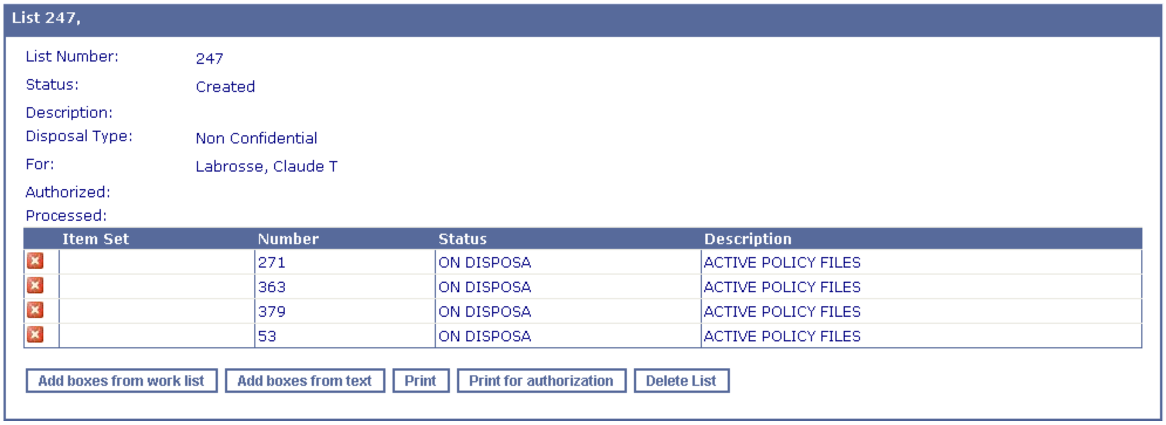
With the Auto Create Function

If you choose the "Auto Create" method, this screen will appear:



Enter the date range for which boxes are due to be destroyed and then fill in the rest of the fields according to your disposal needs.

2. Press on the "Create list" button at the bottom of the page. The following screen appears, whether you choose the "Work List", "Text" or the "Auto Create" method:

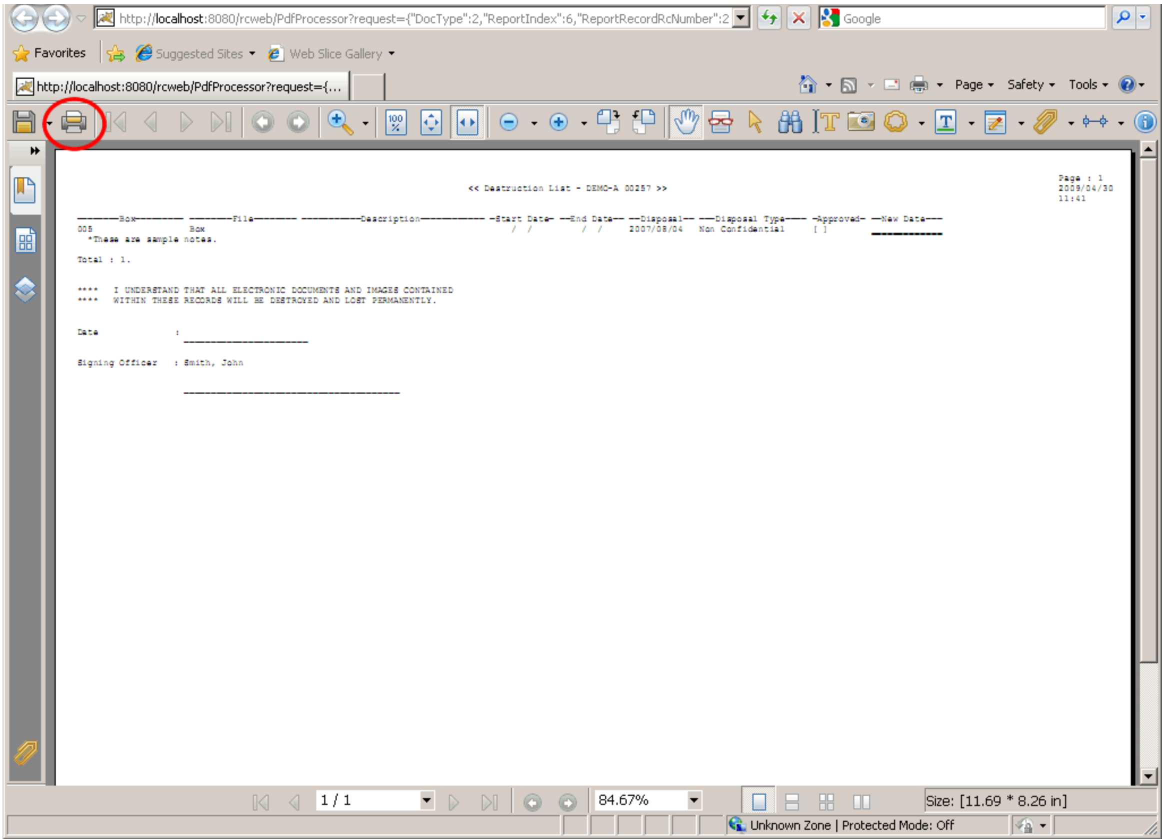


3. From here you can add or delete boxes to the list until your satisfied with it. The next step will be to "print the list for authorization" so that you can get the signing officer to sign the list and then send the list back to your record center so they can proceed with the disposal of the items on the list.

If there are any boxes that cannot be disposed of, a message indicating the box number and the reason will be shown.

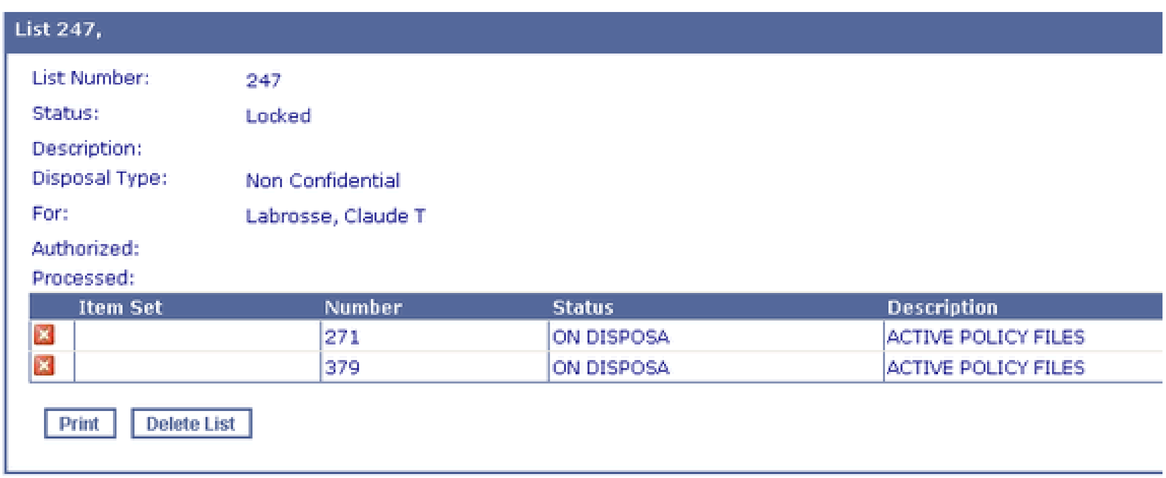
If you want to keep a record of the list before you do any modifications to it, you can choose to print it, by pressing on the "Print" button. Make sure to remove any problematic box from the list, otherwise you will not be able to print it for authorization.

When you click the "Print for authorization" button, a new window will appear with the authorization report like this:



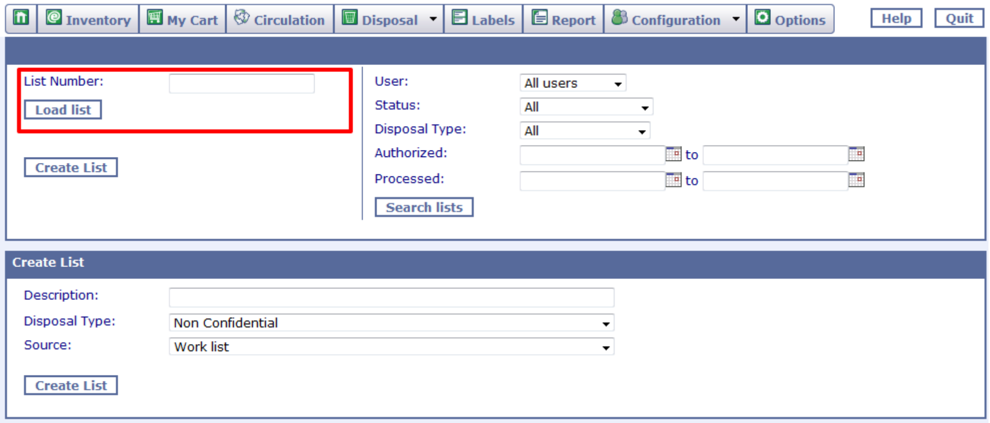
Now you can print the report by using your browser's printing ability as shown in the screen-shot above.

Note: Once the list has been printed for authorization, the list's state goes from "created" to "locked" and no more items can be added to the list (see screen-shot below). You can remove items but not add any more. If you wish to add more you can either "delete" the list before it gets authorized and start over or just put your new items on a new list.



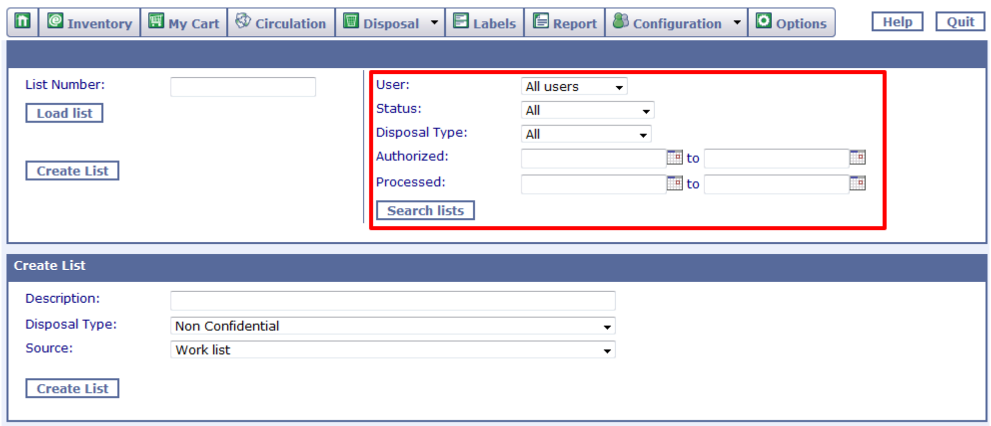
6.1.2 Viewing/Editing an Existing List

To view an existing disposal list enter the list number in the "List Number" field and click on the "Load List" button to view it. If you do not know the list number you will have to Search 84 the list instead.



6.1.3 Searching For an Existing List

You can search disposal lists by using the different search criteria as seen in the screen-shot below. Alternatively if you already know the list number you are looking, you can Load 83 the list.



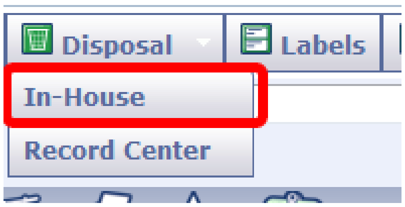
When searching for specific lists, you can:

- Search lists created by the currently logged in user or all users
- Filter on different list status such as created, locked, authorized or destroyed
- Filter lists based on their disposal type
- Filter based on the authorized and/or processed date range

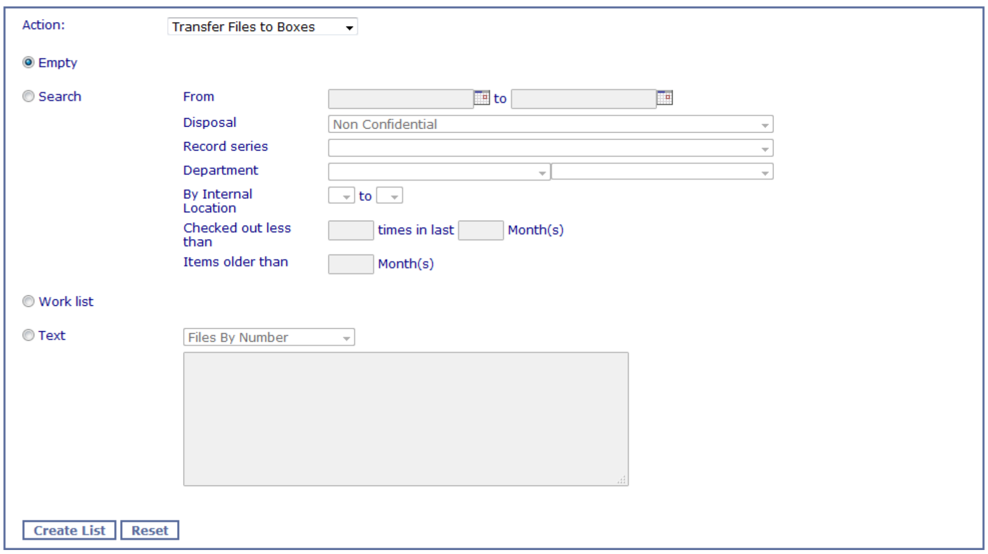
After all the information has been entered, press on the "Search" button. The results will be shown below the search filters.

6.2 Creating a New In-House Disposal List

You can manage In-House disposal lists in ActiveWeb. To access the different disposal options, for boxes and files stored in your offices (In-House), click on the "Disposal Tab" and choose the 'In-House' option.



This screen will happen when you enter the "In-House Disposal" tab for the first time:



Here you can create new lists from different sources and dispose of items in various ways. The following pages will show you how to effectively use the In-House disposal module in ActiveWeb.

Creating a List

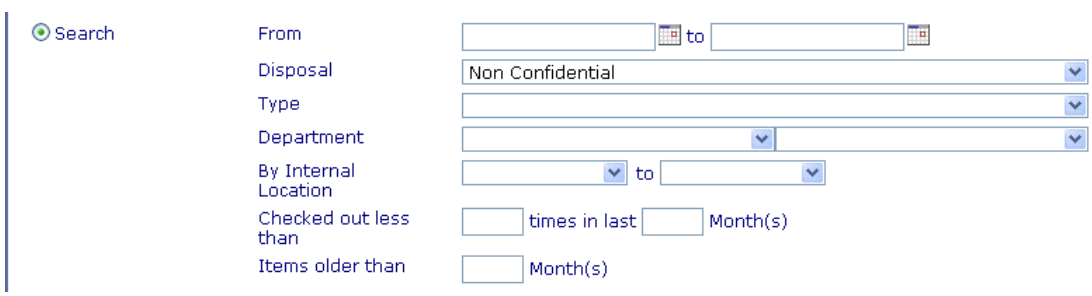
1. Choose the action you want to perform, from the following choices:

- Transfer Files to Boxes: The files (In-House) you will select will go in boxes (In-House).
- Transfer Boxes to PRE ADD: The boxes (In-House) you will select will go in the PRE ADD state in order to be transferred permanently to the Record Center.
- Destroy Boxes: The boxes (In-House) you will select will be destroyed at your premises.
- Destroy Files (physical): The physical files (In-House) you will select will be destroyed at your premises.
- Destroy Files (electronic): The electronic files you will select will be erased permanently from the database.

2. Select the way you will create the list from the following:

Empty List
An Empty List will let you add items by scanning them with the wedge scanner attached to your workstation.

With the Search Function
If you choose the "Search" method, you will have to fill out some of the following fields:



From/to: Search by period by selecting a range of dates. Press on the calendar icon to select a date.
Disposal: Search by Disposal type by selecting one in the list.
Type: Search by Document type by selecting one in the list.
Department / Sub-department: Search by Department and Sub-department by selecting them on the list.
Internal location: Search by internal location interval. Enter a range of locations (from/to)
Check out less than __ times in last __ Month(s): Search by number of times checked out for a specific period of time calculated in months.

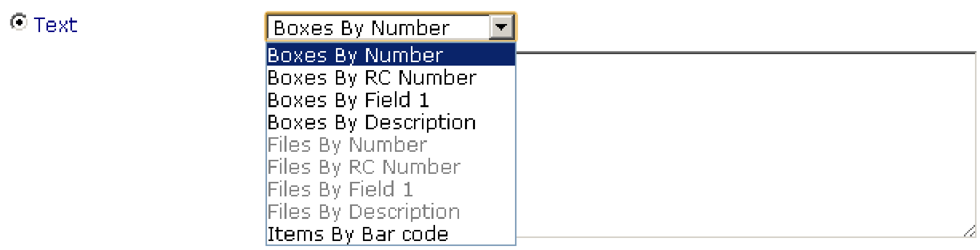
Items older than __ Month(s): Search by number of months since the creation of the item.

From a Work List

In order to create a Work List please consult the following topic: Using the Work List 36. Once your work list is created, see step 3.

From a Text Source

If you choose to create the list via the "Text Source" then you will have to choose by which kind of text field you wish to populate the list as shown in the screen-shot below:



You can now choose from different fields to enter your data (Boxes by Number, Boxes by RC Number, Boxes by Field 1, Boxes by Description, Files by Number, Files by RC Number, Files by Field 1, Files by Description, Items by Bar code). Select a field that is written in black (the fields in gray are not available). The fields available vary from one action to the other (i.e. when destroying boxes only fields pertaining to boxes will appear). You can only populate your list with one type of field at a time (i.e. you cannot enter some data as "Boxes by Number" and others as "Items by Bar code").

When entering data in the "Text" field, you have to enter one item per line:

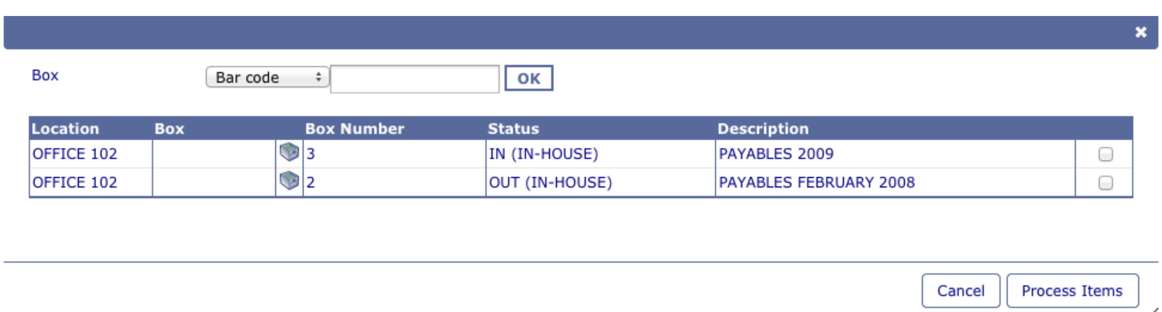
148
149

as opposed to having them on the same line separated by commas, like this:

148,149

Having them on the same line WILL NOT work.

3. Press on the "Create List" button at the bottom of the page. The following screen appears:



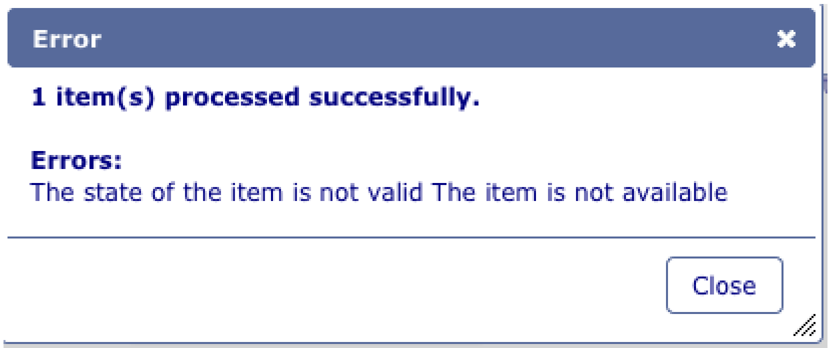
4. To validate the items on the list you can:

- Scan the bar code with a scanner;

- Select "RC Number" in the drop down list, enter a value in the field and click on "OK", or
- Check the box (situated at the extreme right) for each item on the list (this is used for smaller lists).

Once all items have been validated, press on the "Process items" button at the bottom of the window. To cancel the processing of this list, press "Cancel".

5. The following report will appear, showing errors or confirming that a number of items has been processed.



Click on "Close" to return to the **In-House Disposal** tab.

7 Labels Tab

7.1 How to Print Labels

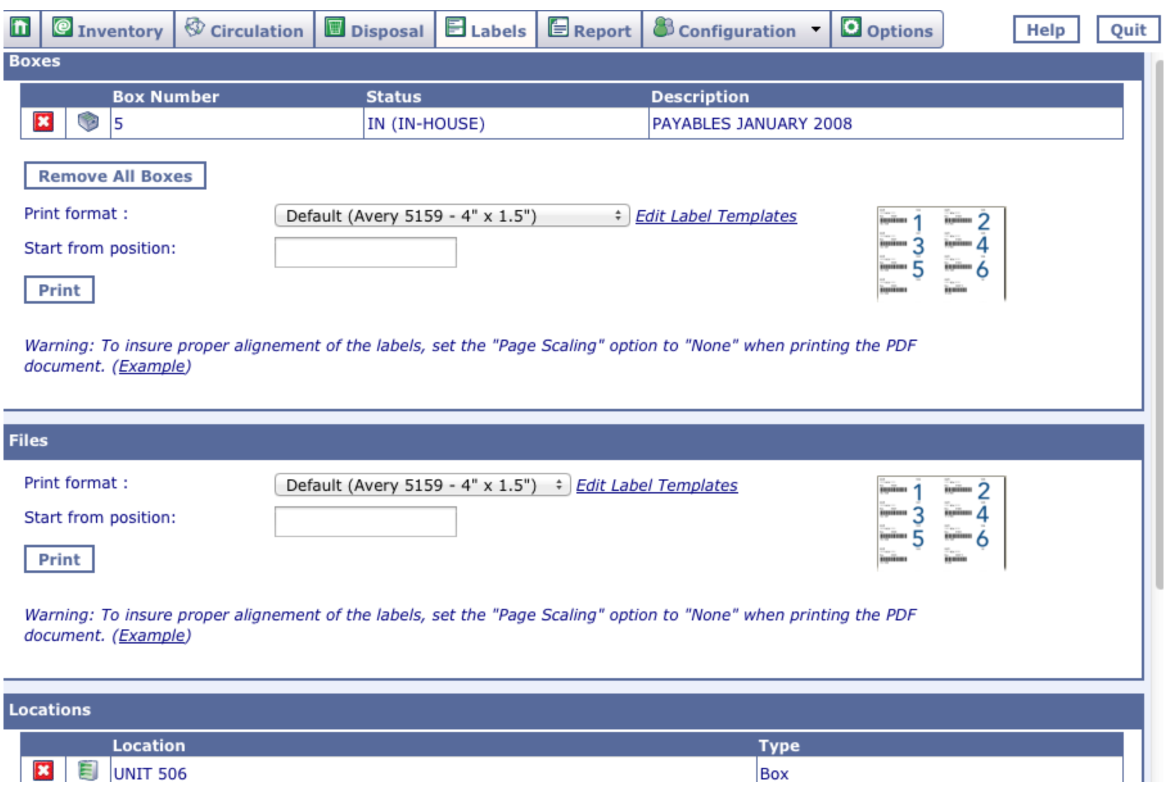
ActiveWeb™ enables you to print your own labels for boxes, files, locations and recipients if you have a printer in your office. The labels are printed on Avery™ sheets. If you want to customize your label templates, consult Label Templates 111.

Printing labels in **ActiveWeb™** is very simple. Follow these steps:

1. In order to add boxes and/or files and/or locations to the "Print List", go in the **Inventory** tab and click on the "Add to Print List" icon for each item you wish to add. In order to add recipients to the "Print List", go in the **Configuration** tab, click on "Recipient" and click on the "Add to Print List" located next to the recipient.

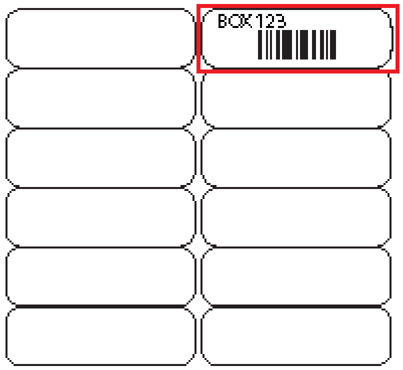
The icon will go from this state  to this one  once the item is on the list.

2. When you have added all the items you want to print, select the **Labels** tab.



Here you can remove individual labels (or all) from the print list if you made a mistake in step 1. Then, choose the appropriate Avery™ label format from the drop-down menu and the print start position of the first label on the sheet. This is used to maximize the label usage of every Avery™ sheet.

Example: if you want to start printing from position 2, the labels on the sheet would print like this:



3. When you are ready to print your labels, click on the "Print" button. The labels will open as a PDF file allowing you to print it from your PDF Reader.

NOTE: To insure proper alignment of the labels, set the "Page Scaling" option to "None" when printing the PDF document. Click on the "Example" link on the web to view an image explaining what to do.

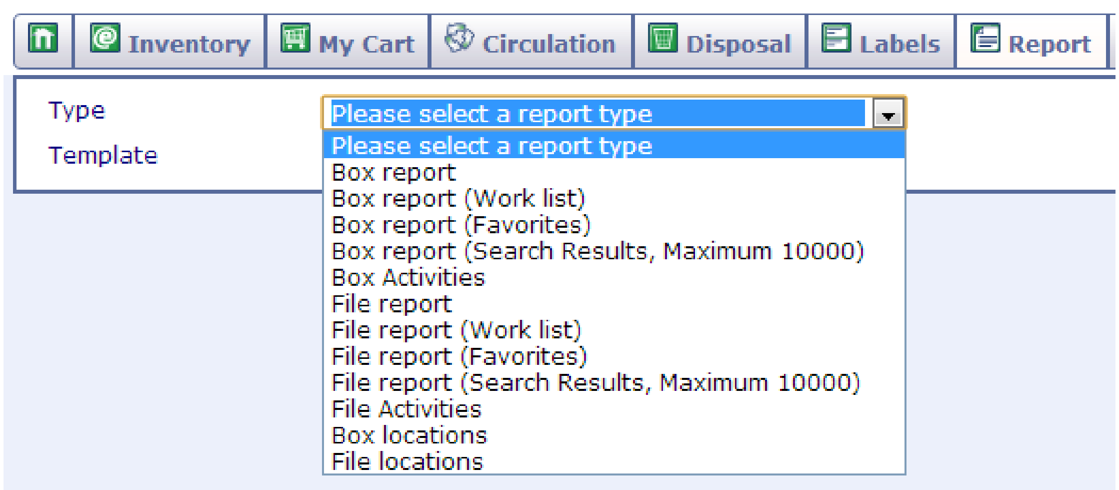
8 Report tab

8.1 How to Create Reports

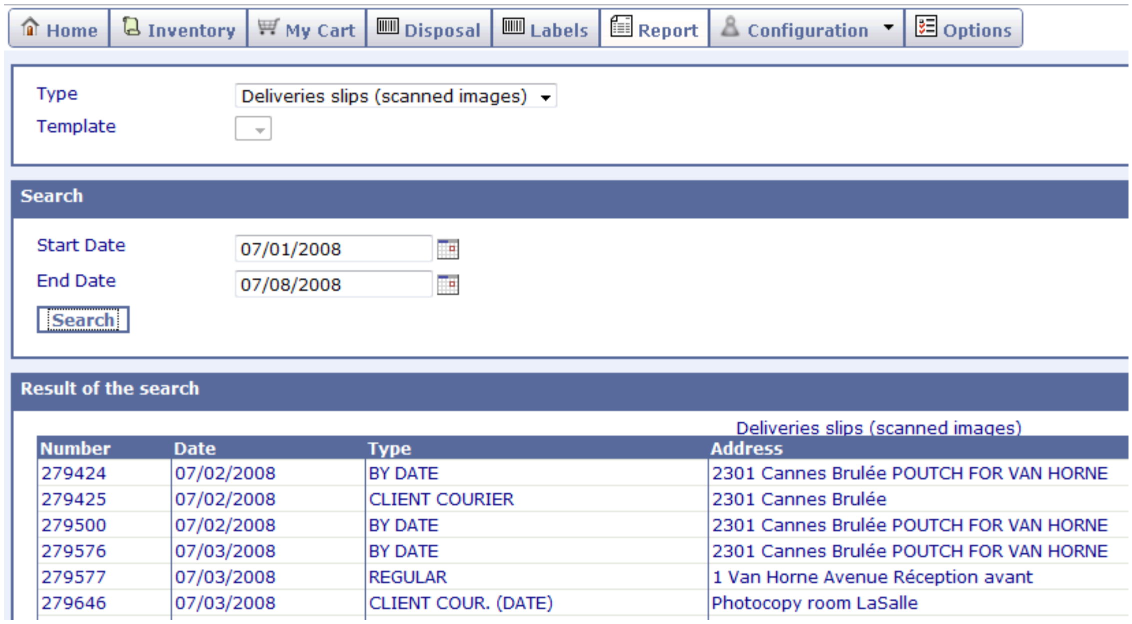
The **Report** tab in **ActiveWeb™** enables you to browse 14 types of reports:

- Delivery slips (scanned images)
- Box Report
- Box Report (work list)
- Box Report (favorites)
- Box Report (search results, maximum 10,000)
- File Report
- File Report (work list)
- File Report (favorites)
- File Report (search results, maximum 10,000)
- File Activities
- Order items
- Box Locations
- File Locations

When you first open the **Report** tab you will see this drop-down list from which you can choose the different report types:



⊟ **Viewing Delivery Slips**



First, search for a date range at which you know a delivery was likely to have occurred. Then click on the "calendar" icons to input the date range and then press the "Search" button when ready. If there is some matches to your search you will see a list of delivery slips as shown above.

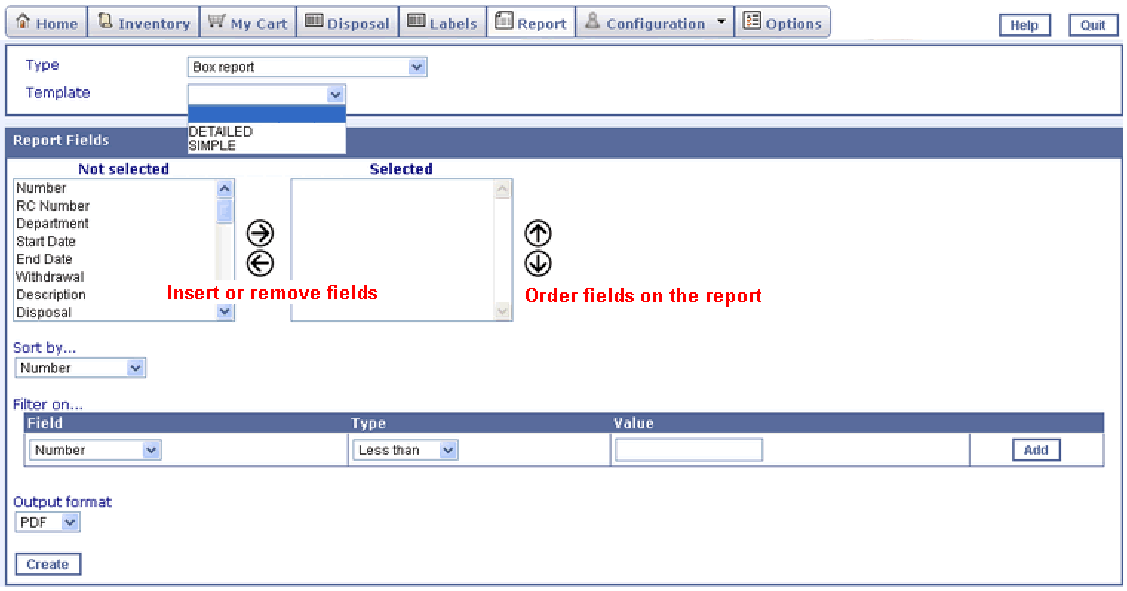
Note: The date range cannot exceed 62 days.

When you click on one of these search results, a PDF file will be generated. It will contain the imaged delivery slip. You might be prompted to either download, open it or it will open automatically on another web page.

Generating Boxes and/or Files Reports

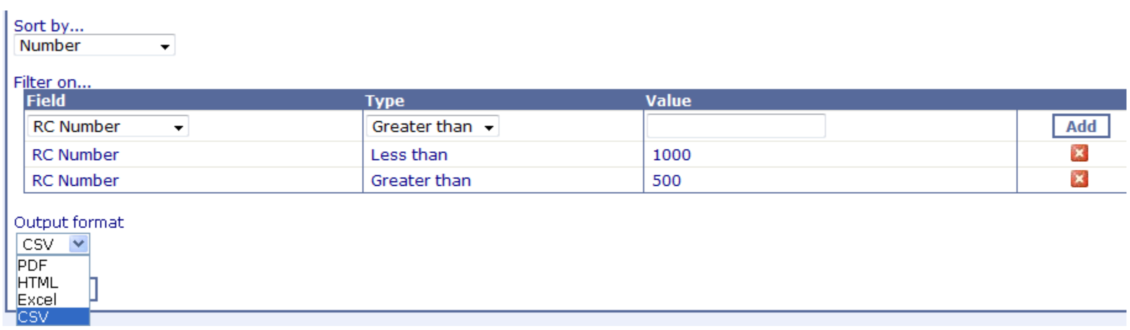
The process is the same for boxes or files. We will use the box example.

You can either choose a template that your record center has generated in advance for you or you can build the report from scratch. If the record center generated templates for you, you will see them appear in the drop-down field called "Template" as shown in the screen-shot below:



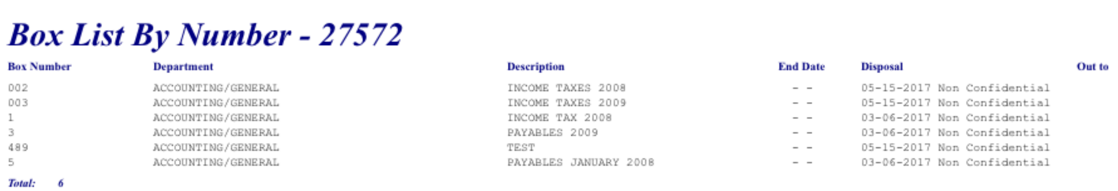
If you do not want to use one of these templates and you want to create your own report, then "select" some fields from the "Not selected" side and move them to the "selected" side. Once selected you can also change the order in which the fields are going to appear on the report by using the up and down arrows.

Once your fields are all selected you can choose which field the report is going to be sorted by, the output format (PDF, HTML, Excel or CSV) as in the example below. You can also add filters to your search on several fields as shown below.



To add a filter, choose which field to filter by in the drop down menu, the type of filter (<, >, = etc..) and a value if needed then press the "Add" button to add the filter.

Once you are done, press the "Create" button to generate the report.



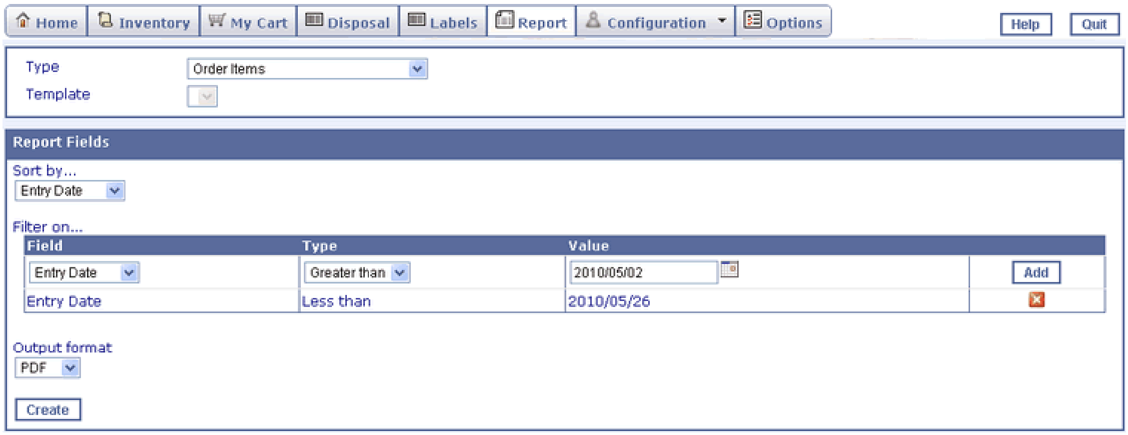
Box List By Number - 27572

Box Number	Department	Description	End Date	Disposal	Out to
002	ACCOUNTING/GENERAL	INCOME TAXES 2008	- -	05-15-2017 Non Confidential	
003	ACCOUNTING/GENERAL	INCOME TAXES 2009	- -	05-15-2017 Non Confidential	
1	ACCOUNTING/GENERAL	INCOME TAX 2008	- -	03-06-2017 Non Confidential	
3	ACCOUNTING/GENERAL	PAYABLES 2009	- -	03-06-2017 Non Confidential	
489	ACCOUNTING/GENERAL	TEST	- -	05-15-2017 Non Confidential	
5	ACCOUNTING/GENERAL	PAYABLES JANUARY 2008	- -	03-06-2017 Non Confidential	

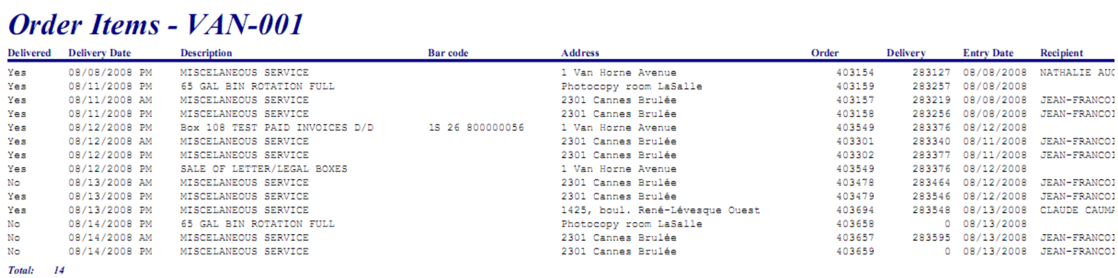
Total: 6

Viewing Ordered Items

To view what was ordered during a specific time period, you choose the "Order Items" report from the "Type" drop-down menu and filter on a date or date range as shown in the screen-shot below:



You can also sort the report by various fields and can choose a specific output format. When you press the "Create" button, the report will output something similar to this:



Order Items - VAN-001

Delivered	Delivery Date	Description	Bar code	Address	Order	Delivery	Entry Date	Recipient
Yes	08/08/2008 PM	MISCELANEOUS SERVICE		1 Van Horne Avenue	403154	283127	08/08/2008	NATHALIE AUC
Yes	08/11/2008 PM	65 GAL BIN ROTATION FULL		Photocopy room LaSalle	403159	283257	08/08/2008	
Yes	08/11/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403157	283219	08/08/2008	JEAN-FRANCOI
Yes	08/11/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403158	283256	08/08/2008	JEAN-FRANCOI
Yes	08/12/2008 PM	Box 108 TEST PAID INVOICES D/D	1S 26 800000056	1 Van Horne Avenue	403549	283376	08/12/2008	
Yes	08/12/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403301	283340	08/11/2008	JEAN-FRANCOI
Yes	08/12/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403302	283377	08/11/2008	JEAN-FRANCOI
Yes	08/12/2008 PM	SALE OF LETTER/LEGAL BOXES		1 Van Horne Avenue	403549	283376	08/12/2008	
No	08/13/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403478	283464	08/12/2008	JEAN-FRANCOI
Yes	08/13/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403479	283546	08/12/2008	JEAN-FRANCOI
Yes	08/13/2008 PM	MISCELANEOUS SERVICE		1425, boul. René-Lévesque Ouest	403694	283548	08/13/2008	CLAUDE CAUMA
No	08/14/2008 PM	65 GAL BIN ROTATION FULL		Photocopy room LaSalle	403658	0	08/13/2008	
No	08/14/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403657	283595	08/13/2008	JEAN-FRANCOI
No	08/14/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403659	0	08/13/2008	JEAN-FRANCOI

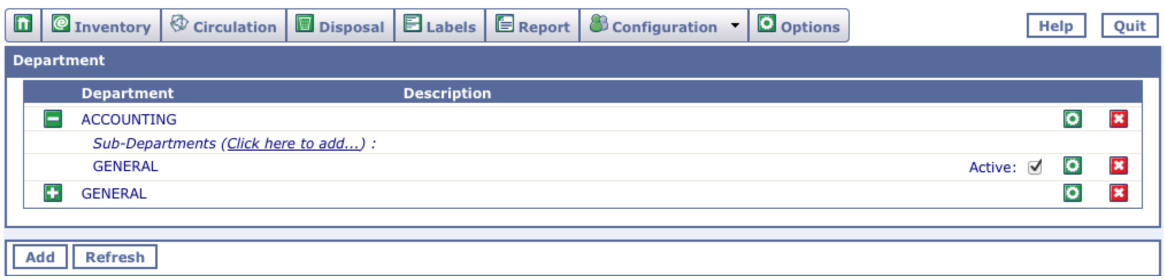
Total: 14

9 Configuration Tab

The elements available in this tab are mostly for management purposes. It enables you to easily manage departments, retention schedules, field definitions for files and boxes, user accounts and label templates.

9.1 Departments

You can manage departments from within **ActiveWeb™**. To access this function, select the **Configuration** tab and select the "Department" menu item. Here is a an example of what you will find when entering the "Department" module of **ActiveWeb™**:

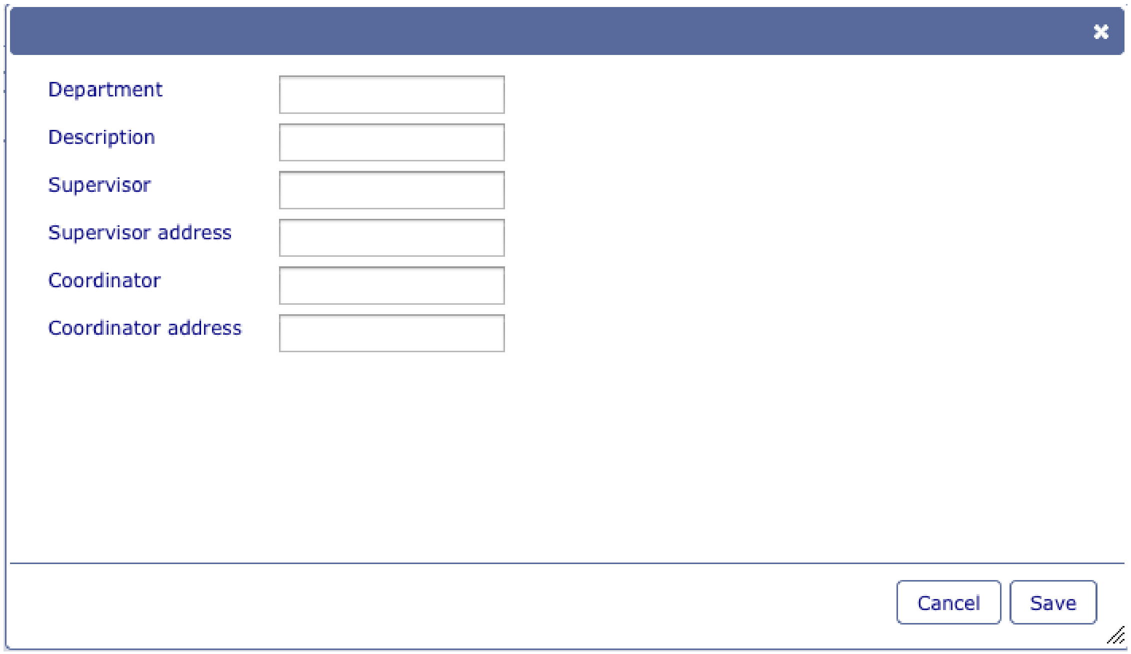


Note: You may not have the option to edit or delete departments. This will happen if your company has a copy of DocuData's ActiveFile Software installed and replicated with your record center or your user settings at the record center prevents you from editing departments.

Here you can add, edit and delete main and sub departments.

Adding and Editing Departments

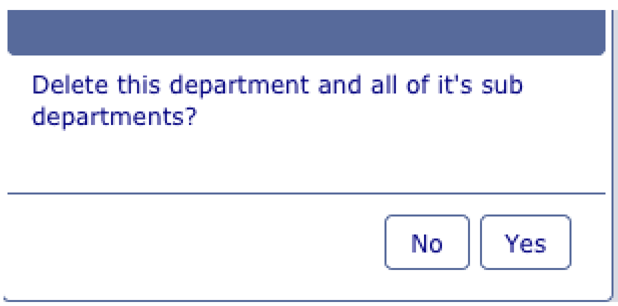
Whether you are adding a new department or editing an existing one, the interface is the same for both. This screen will appear:



You can fill in the fields you need to and then press the "Save" button when done.
It is the same process for editing or adding sub-departments.

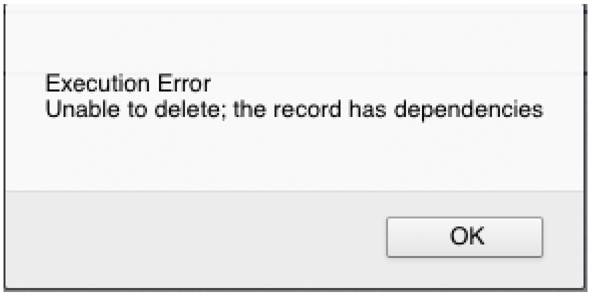
Deleting or Deactivating a Sub-Department

- To delete a sub-department, click on the "" button next to it. A confirmation message will appear.



- Click on "Yes" to go on deleting the sub-department.

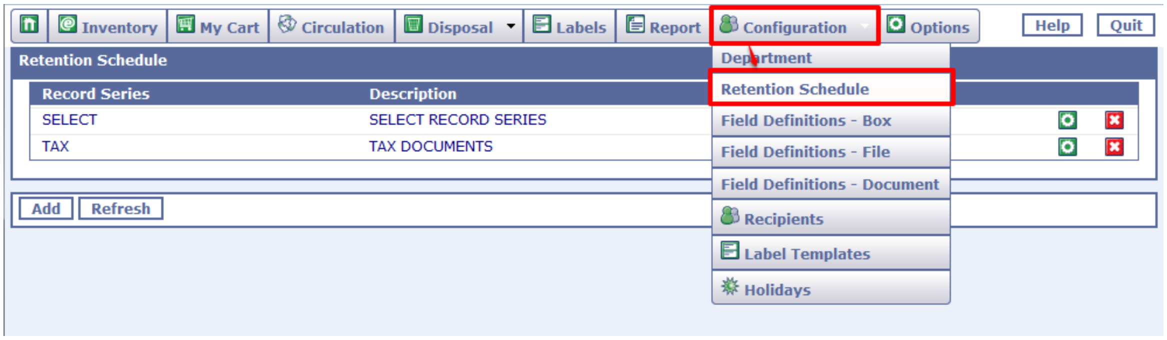
Note: In order to delete a sub-department it must not be assigned to any box or file, otherwise the following message will appear:



- To deactivate a sub-department, uncheck the "Active" box next to it. This will remove it from the choice list when adding or editing an item. If the sub-department is the only one assigned to a department, the department itself will not be available either.

9.2 Retention Schedules

You can manage retention schedules (document types) from within ActiveWeb. These types are used to classify records, to calculate their disposition dates and to specify their disposition mode. To access this function, click on the "Configuration" tab and select the Retention Schedule menu item. This screen will appear when entering the Retention schedule module of ActiveWeb:



Here you can add, edit and delete retention schedules.

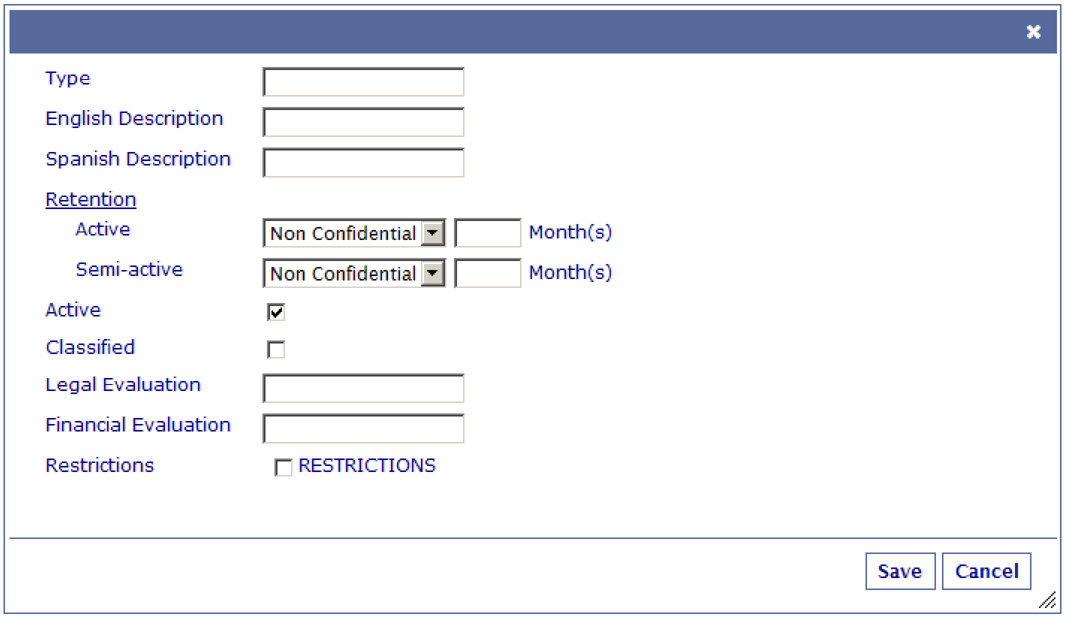
Note: You might not have the option to edit or delete retention schedules. This will happen if:

- Your company has a copy of DocuData's ActiveFile Software installed and replicated with your record center.
- Your user settings at the record center prevents you from editing retention schedules.

Adding and Editing Record Series

Whether you are adding a new Retention Schedule or editing an existing one, the interface is the same for both. This screen appears:

Whether you are adding a new retention schedule or editing an existing one, the interface is the same for both. This screen will appear:



Fill in the fields you need and then press the "Save" button when done.

Description of the fields seen on this screen:

Type

This field indicates the name of the document type. This value will appear in the drop-down list associated with Type field of the boxes and files from the inventory modules.

English and Spanish Descriptions

These fields give the English and Spanish descriptions of the document type.

Retention

Active

This field indicates the active retention period for boxes and files of the selected type.

Semi-Active

This field indicates the semi-active retention period for boxes and files of the selected type.

Disposal Modes

Active

This field indicates how the documents will be disposed of at the end of their active retention period.

Semi-active

This field indicates how the documents will be disposed of at the end of their semi-active retention period.

The following list describes the disposal modes:

CONFIDENTIAL

These documents will be disposed in a confidential manner.

NON-CONFIDENTIAL

These documents will be disposed in a non-confidential manner.

NONE
A disposal mode has not been determined.

PERMANENT
These documents will never be disposed of.

REVISION
These documents will be placed on a list so that they can undergo a special verification before being disposed of.

SAMPLE
These documents will be placed on a list so that samples can be extracted before disposing of the remaining items.

SEND TO DEPOT
Documents must be sent to another storage area, different from the off-site record center, where they will be stored indefinitely. From that moment on, the off-site record center will no longer responsible for the conservation of the documents.

Active
When this field is "unchecked", this type is set as inactive and can no longer be associated to documents.

Classified
This field indicates that the document has a classified status.

Restrictions
Field containing the values defined in the Restriction module at the record center.

This field is viewable only when the Restriction Integrity field of the Customer Information module is set to "Yes" at the record center and when the customer is not electronically linked to the record center via the ActiveFile Software. This field indicates the restrictions associated with the selected type.

Legal Evaluation
This field indicates how long the document needs to be conserved from a legal point of view.

Financial Evaluation
Indicates how long the document needs to be conserved from a fiscal point of view.

Note: the "Classified", "Legal Evaluation", "Financial Evaluation" and "Restrictions" fields are optional when creating a retention schedule.

9.3 Field Definitions for Boxes

You can manage Field Definitions for boxes within **ActiveWeb™**. Field Definitions can be edited, made mandatory, can be given drop-down values or can be disabled. To access this function, select the **Configuration** tab and select the "Field Definitions Box" menu item.

Editing a Field

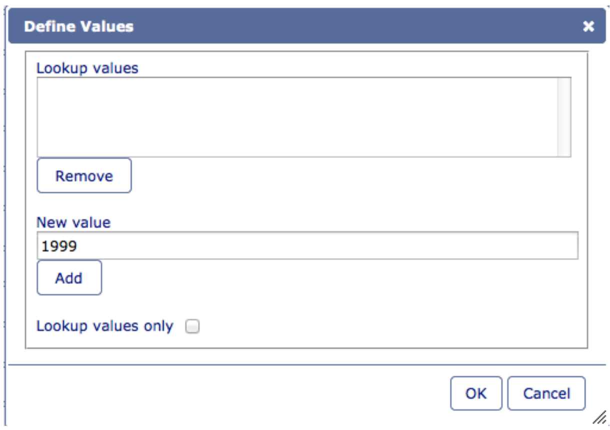
Click on a field to rename it. Save the changes.

Red fields are mandatory, Blue fields are optional and Grayed out fields are disabled.

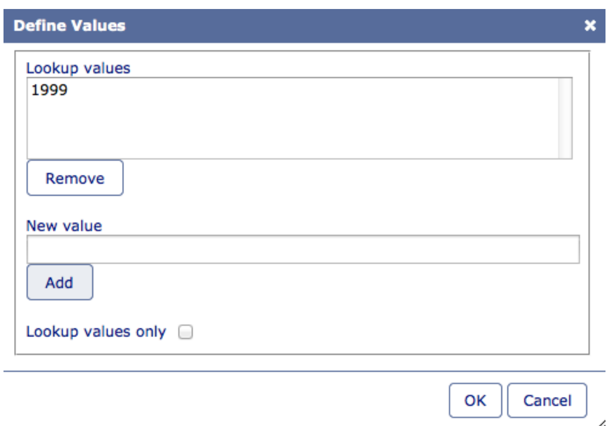
Click on "More" to show additional fields.

To enable a field uncheck the "Disabled" box.

To define values for a specific field, click on "Define Values" beside the field to edit.



To add a value in the selection list, enter a value in the "New Value" field and click on "Add".



To remove an existing value from the selection list, select the value in the "Lookup Values" list and click on "Remove'.

To close this window and save you changes, click on "OK".

9.4 Field Definitions for Files

You can manage Field Definitions for files within **ActiveWeb™**. Field Definitions can be edited, made mandatory, can be given drop-down values or can be disabled. To access this function, select the **Configuration** tab and select the "Field Definitions File" menu item.

Please refer to the Field Definitions For Boxes 101 topic to know how to edit a field.

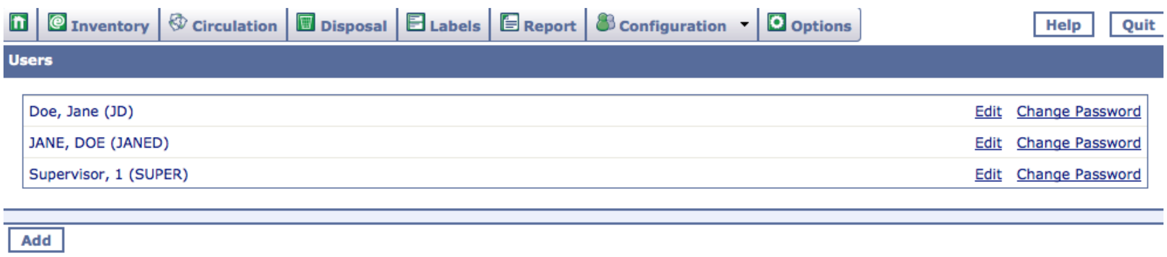
9.5 Field Definitions for Documents

You can manage Field Definitions for documents within **ActiveWeb™**. Field Definitions can be edited, made mandatory, can be given drop-down values or can be disabled. To access this function, select the **Configuration** tab and select the "Field Definitions Document" menu item.

Please refer to the Field Definitions For Boxes 101 topic to know how to edit a field.

9.6 User

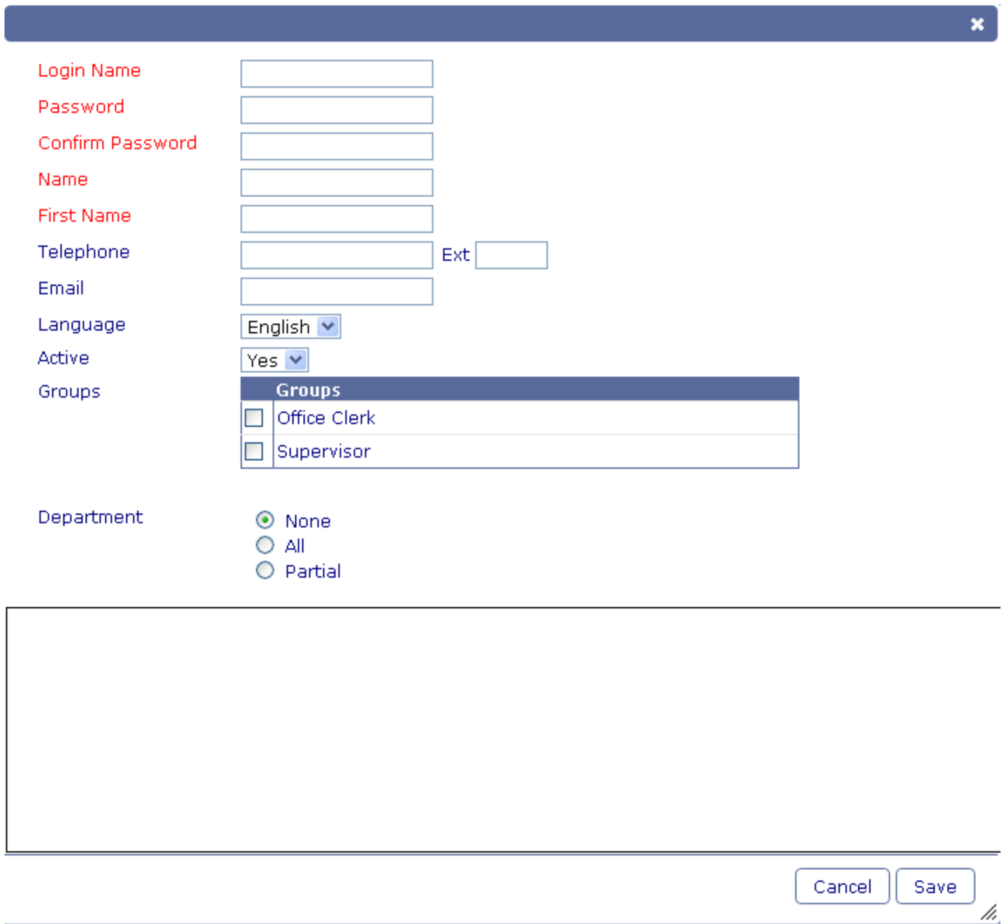
The "User" section allows the addition of new users to **ActiveWeb™** and also allows existing users information to be edited. To access this function, select the **Configuration** tab and select the "User" menu item. Here is a an example of what you will find when entering the user module of **ActiveWeb™**:



Note: Not every user has access to the "user" tab because of its administrative features. If you require access to this, ask your record center.

Adding a User

To add a new user, click on "Add".



These fields have the following values:

Login Name
Mandatory field that can be used instead of the email when the user logs in to **ActiveWeb™**.

Password and Confirm Password
Mandatory field that is used when the user logs in to **ActiveWeb™**.

Name and First Name
Mandatory field used when contacting the user by email.

Telephone
Optional field for internal use.

Email
Optional field for internal use. This information is nonetheless very useful when emailing Overdue Records 111.

Language
Mandatory field specifying the language of the user's interface. There is a choice between English and French.

Active

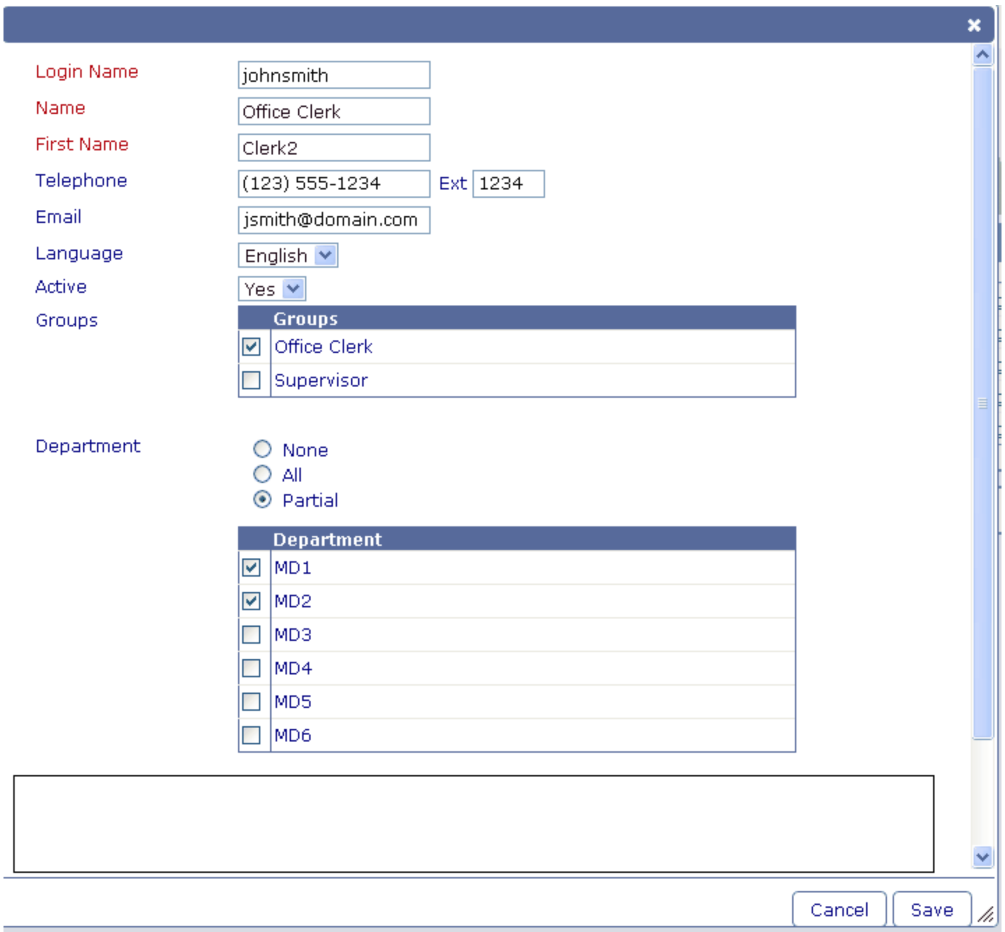
Mandatory field indicating if the user can access **ActiveWeb™.**

Groups
Check list of the different rights user groups and individuals have access to. If a group is checked off, it means the users will have its related access rights.

Departments
Check list of the different departments the individual has access to. If a department is checked off, it means the user will have access to the files, boxes and electronic documents assigned to it.

Editing an Existing User

To edit a user's rights or contact information, click on "Edit" beside the related user.



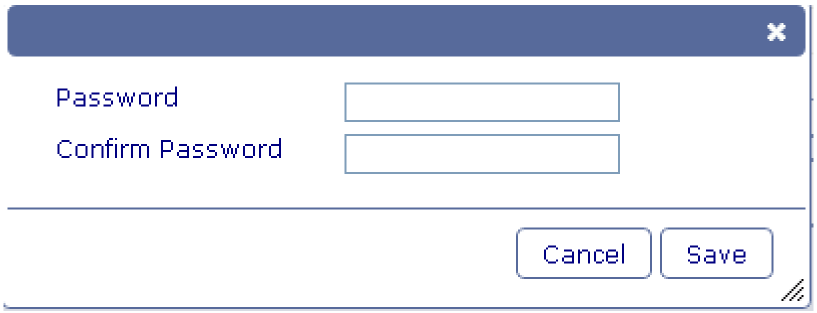
Edit the information in the appropriate fields (e.g. login name, name, first name, telephone, email, etc.) and edit the user's rights by selecting one or many user groups and departments. When all the changes have been made, click on "Save" to save the information or on "Cancel" to cancel the modifications.

Deactivating a User

In order to block a user from accessing **ActiveWeb™**, click on "Edit" beside the related user. Select "No" in the "Active" field. Click on "Save". From that moment on, the user will be unable to log into

ActiveWeb™.

Changing a User Password
To edit a user's password, click on "Change Password" beside the related user.



Enter and confirm the new password and click on "Save".

9.7 User Group

The "User Group" section allows the addition of new user groups to **ActiveWeb™** and lets you edit or delete existing ones. To access this function, select the **Configuration** tab and select the "User Group" menu item. When you first open the "Users" menu item, this screen will appear:

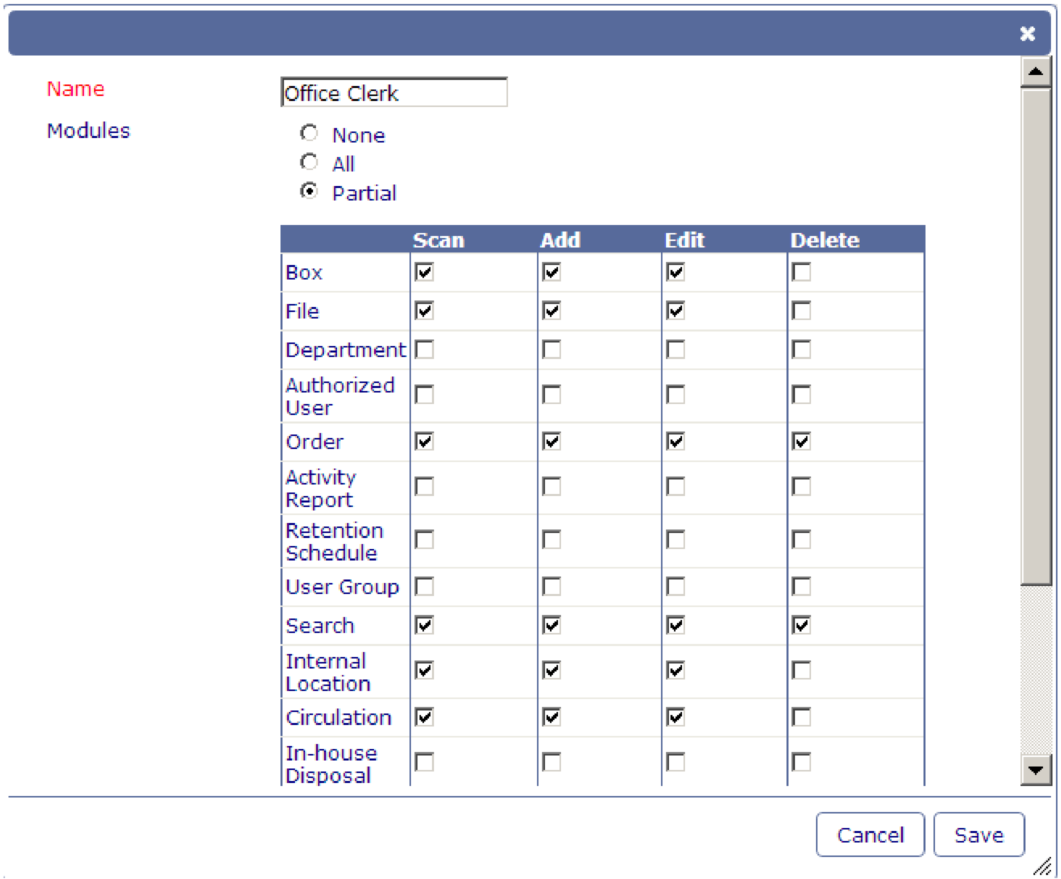
Note: Not every user has access to the "User Group" menu item because of its administrative features. If you think you require access to it, just ask your account administrator.

The "Supervisor" user group is always there by default.

Adding a User Group
To add a new user group, click on "Add".

Name
Mandatory field describing the user group (i.e. this is usually related to the job function).

Modules
Choice between: "None", "Partial" and "All".
When "None" is chosen, the user will not have access to any module.
When "All" is chosen, the user will have access to all the modules. This is usually reserved for power users and supervisors.
When "Partial" is chosen, a list of modules appears.



For every module, check off the "actions" permitted: "Scan", "Add", "Edit" or "Delete".

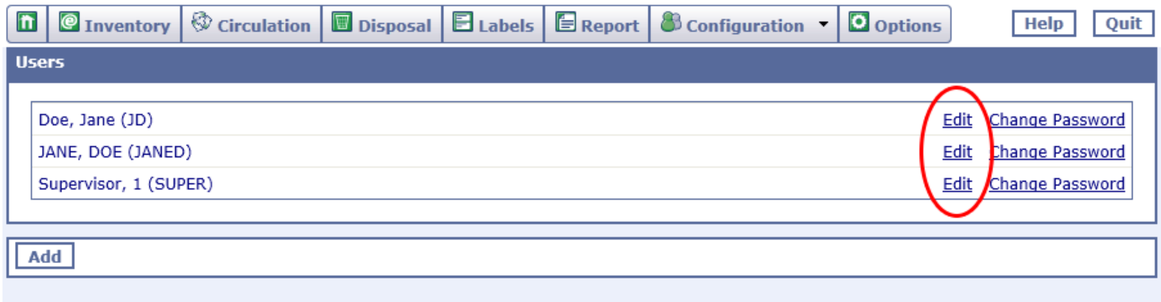
- Scan: means that the person only has read-only rights in **ActiveWeb™**.
- Add: means a box, file or document can be added (depending on the module it is associated to).
- Edit: means a box, file or document can be edited (depending on the module it is associated to).
- Delete: means a box, file or document can be deleted or Destroyed (depending on the module it is associated to).

Here is a list of common actions performed in **ActiveWeb™** and the rights associated to them:

- Searching
- Adding a new box, file or document
- Deleting items
- Creating deletion lists
- Checking items in
- Checking items out

Editing an Existing User

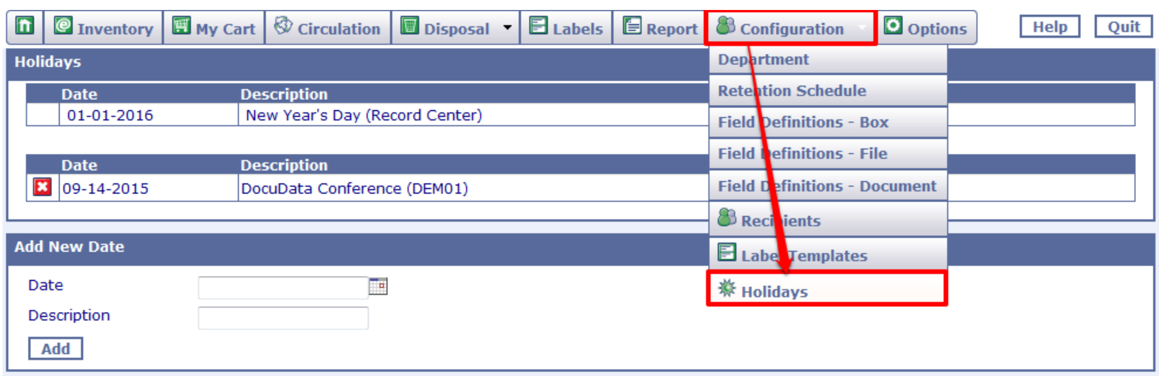
To edit a user's rights or contact information, click on "Edit" beside the related user.



Modify the rights and click on "Save".

9.8 Holidays

Viewing and managing holidays in ActiveWeb is divided in two parts. The upper part shows the holidays defined at the record center. The bottom part shows your holidays. To easily determine which is which, the record center holidays have the words "Record Center" next to them AND you cannot edit them as opposed to yours.



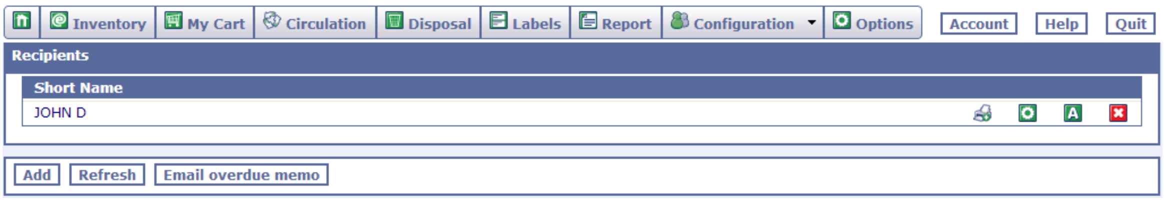
If you need to add a holiday, place a date and description in the "Add New Date" form and press "Add". To delete one of your Holidays, press on the ✖ beside the date in the "Holidays" screen.

Note: Holidays coming up in the next 7 days are also shown on the home page of ActiveWeb when you log in.

9.9 Recipients

Recipient is the person receiving the item and identified in possession of the item. This individual may or may not have user rights in **ActiveWeb™**.

In order to manage recipients efficiently and keep track of them, enter recipient names in this list. This will quicken operations, since a drop-down list of recipients beginning with the same letter will appear when changing a recipient or checking "OUT" items.



Adding a Recipient

1. Verify if the recipient is already in the list. If not, click on "Add".

2. Enter the information in the following fields:

Short Name
The information in this field should be chosen to reflect the person's identity in a shortened form. The Short Name cannot be associated with more than one recipient. When choosing a recipient, the short name appears once you enter its first letter (along with all the other short names beginning with the same letter).

First Name, MI (Middle Initial) and Name
Enter the person's first name, middle initial (if needed) and last name.

Email
Enter the person's email address.

Active
Check-box indicating that this recipient is authorized to loan files. When a recipient does not need access to **ActiveWeb™** anymore or stopped working for your organization, always chose to deactivate it. You can do this by unchecking the box. This will enable you to 'track down' the recipient's information if a problem occurs, for example, if the person forgot to put the entire content of a file back in the physical folder.

3. Click on "Save" to accept the addition or "Cancel" to exit the window.

Adding the Recipient to the Label Print List

Click on the "Add to the Label Print List" icon beside the desired recipient.

Editing the Recipient's Information

Since the short name is used as the main identifier for a recipient's information, you cannot modify it like all the other recipient fields (see below for information about renaming a recipient).

1. Click on the "Edit" icon beside the desired recipient.

2. Edit the fields that need to be modified and click on "Save" to accept the modifications or "Cancel" to exit the window.

Renaming a Recipient

'Renaming a Recipient' means transferring the identity of a recipient to another recipient. Therefore, when one renames a recipient, it must be for an existing recipient. The main usage of this feature is when, for example, a recipient is inactive (i.e. JO) and you would like to reuse its 'short name' for another user (i.e. JOE).

Example: If you have the following list of recipients: JOHN, JANE, JOE, JO and want to rename JOE to JOHN you could. On the contrary, if you wanted to rename JO to JAMES, the system would not let you because it is not an existing recipient.

1. Click on the "Rename Recipient" icon A beside the active recipient (to take the previous example: JOE).

2. Enter the name of the recipient you want to use in the future (e.g. JOHN) and select it. Click on "Save".

3. A confirmation message appears. Click on "Yes" to follow through with the process or "No" to stop it.

4. Edit the recipient's information, since the system always keeps the information of the first recipient using this short name (see above for instructions).

Deleting a Recipient

Before deleting a recipient, evaluate if this action is necessary by asking yourself: 'Does one recipient need the person's short name for identification purposes?' If the answer is "No", consider deselecting the "Active" box of this recipient. Its information will be available for tracking purposes. But, if the answer is "Yes", then you can either transfer the name to another user (see above for instructions) or proceed with the following steps:

1. Click on the "Delete" icon beside the recipient you want to delete.

2. The system will check if the recipient has any items in his possession "OUT (In-House)".

If the recipient has any items "OUT (In-House)", we suggest you click on "No". Then, run a report based on the following steps (box and file reports follow the same process):

A. Go in the **Report** tab.
B. Select the "Box Report" option.
C. Send the "Out to" and the "RC Number" fields in the "Selected" column.
D. Add a filter with the following information: Field: "Out to" Equal Value: (Short name of the recipient you want to delete).
E. Select an output format.
F. Create the report and print it (if need be).

3. Proceed to transferring this recipient's boxes or files to another Recipient 21 or to Check In Items 74.

4. Once this is done, repeat steps 1 and 2. A confirmation message appears. Click on "Yes" to follow through with the process.

Emailing Overdue Memos

Overdue memos are used to remind recipients that they have items in their possession for a period of time longer than allowed. An email will be sent to these recipients listing all the items they have registered in their possession, starting with oldest first.

1. Click on "Email Overdue Memo".

2. Enter a date range manually or by using the "Calendar" icons and click on "OK".

3. The memos will automatically be sent to recipients that have items out. Otherwise, a message appears if recipients did not have an email set up in their information. Click on "Yes" to continue. A list of skipped recipients will appear. Close it to go back to the "Recipient" menu item.

Refreshing the Screen

The "Refresh" button at the bottom of the list is especially useful if many people have access to the recipient's module (i.e. if your organization has more than one supervisor). Click on the "Refresh" icon and the most recent information will be displayed on screen.

9.10 Label Templates

"Label Templates" determine the layout of printed labels for boxes and files. After completing this section, you will be able to edit existing templates and create new ones for a variety of label sizes.

Choosing a Template to Edit

To access the drop-down listing of all templates, select the **Configuration** tab and select the "Label Templates" menu item. Choose a template in the following listing:

Box
Default
New template

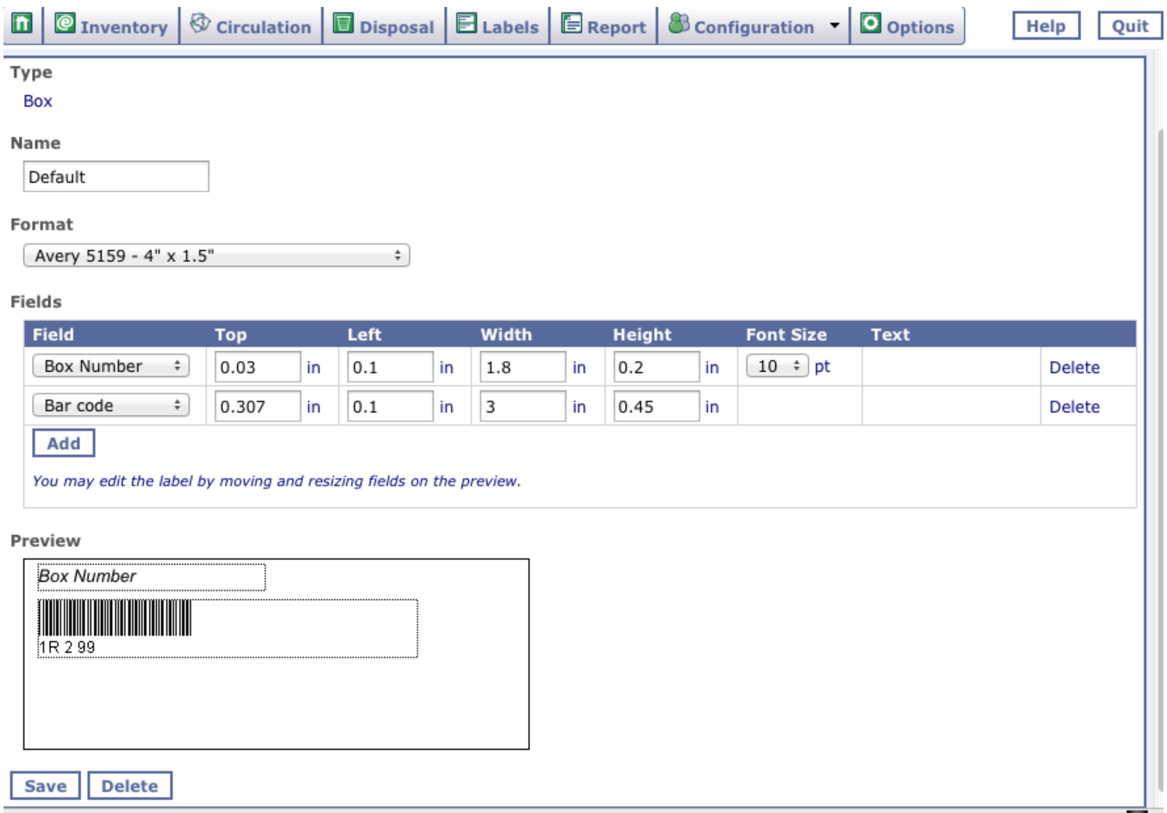
File
Default
New template

Location
Default
New template

Note: If you previously created new templates, they will appear in the list below "Default".

Editing an Existing Template

The template you have previously chosen appears in the window.



Here is a detailed explanation of each field present on screen:

Type
Box, File or Location.

Name
Here you can edit the template's Name to better describe the label's content and layout.

Format
Choice list of commonly used Avery™ label sizes (US and Canada).

Fields
- Field: This is the field's name. You can select another field in this list if you want.

Note: the preview section will show you the content of this field automatically.

- Top: This indicates the number of inches (with decimals) between the top edge of the label and the top edge of the field.

- Left: This indicates the number of inches (with decimals) between the left edge of the label and the left edge of the field.

- Width: This indicates the width of the field in inches (with decimals).

- Height: This indicates the height of the field in inches (with decimals).

- Font size: This indicates the font size of the text for this field.

- Text: This is only available when the Text field is selected. This box lets you enter text that will appear on every label from this template.

Preview
This section lets you arrange the general layout of the template manually.

Each field can be dragged to the correct position; when you hover over a field with your mouse, a hand appears. Click on a field to drag it and release the button to drop it.

Each field can also be re-sized by using the bottom right corner of the field. Click and drag to the correct size.

Every change made in the preview section will automatically update the values in the Fields section (top, left, width, height).

To Add a Field
Click on "Add":

When you "Add" a new field, the system automatically selects the first field in the list. To select another one, scroll-down the list to see all the values you can choose from. Each new field added is placed in the upper left corner (position 0 from the top and 0 from the left).

To Delete a Field
Click on "Delete" beside the field you want to delete it from the label.

To Move a Field on the Label
- In the Field section:

Enter the desired position (in inches) in the top and left columns associated to that field.

- In the Preview section:

Drag and drop the field in the correct position.

To Re-size a Field on the Label
- In the Field section:

Enter the dimensions you want the field to be in the width and height columns associated to that field.

- In the Preview section:

Re-size the field by dragging the bottom-right corner into the right position.

Creating a New Template

When you select "New Template", the screen you view is very similar to the one appearing when editing a template. The only difference is that the name will be empty and only one field is present (bar code) in the listing.

Saving or Canceling Modifications

Once you have created or modified a template you can either:

- Save your changes, by clicking on the "Save" button.

OR

- Cancel your changes, by quitting your session without saving.

Deleting a Template

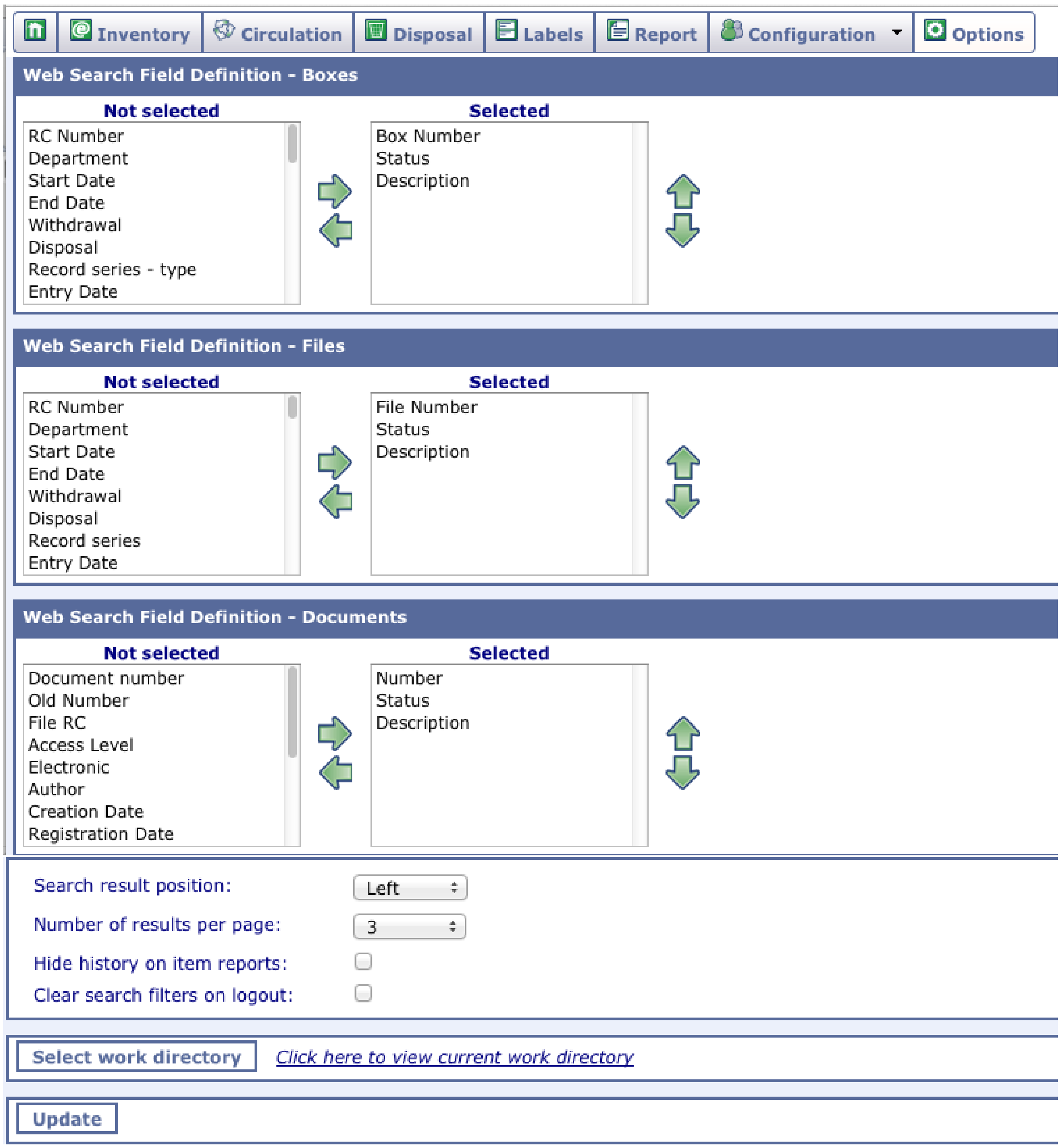
To delete a template, select the template you want to delete in the drop-down list at the top of the window and click on the "Delete" button.

10 Options Tab

10.1 Options Overview

The **Options** tab enables you to change some aspect of the user interface inside the **Inventory** tab. Particularly you can choose which fields are displayed in the search results, the location of the search results and the number of results per page.

This screen will appear when you open the **Options** tab:



For Web Search Definitions

Put the fields you need in the "Selected" area for both boxes and files by using the arrows. You can also choose the order of the fields with the "Up" and "Down" arrows. These fields will be shown in the search results column and are used to describe the item.

For Other Options

- Search result position: This indicates how the search results are positioned in the **Inventory** tab.
- Number of results per page: the "Default" number of results per page is 10. You can scroll down the choice list to select a different number.
- Hide history on item reports: When this option is activated, the history of items will not appear when printing Box or File Details 19.
- Clear search filters on log out: When this option is activated, the search filters will be cleared once you terminate your session, otherwise they will be saved for your next session.
- Select work directory: This is necessary when you want to work with electronic documents. This directory determines where the documents will be temporarily saved when working with them. Click on "Select Directory" and select a folder. To view the current directory you are using, click on "Click Here to View Current Work Directory".

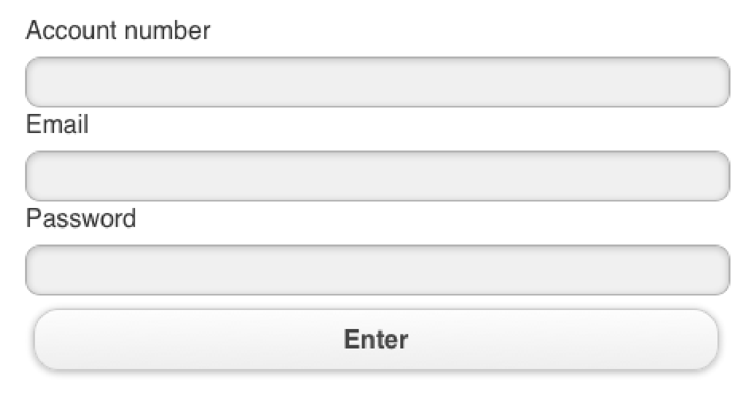
11 Mobile Application

A simplified version of **ActiveWeb™** can be used on your smart phone. You will then have access to your records' information anytime and anywhere.

11.1 Log In

In order to log into **ActiveWeb™**' phone application, go in a web browser (e.g. Safari, Google Chrome, etc.) and type /mobile at the end of your standard login link,
e.g. if you access ActiveWeb using https://activeweb.docudatasoft.com/, then try https://activeweb.docudatasoft.com/mobile/

The following screen will welcome you, adjusted for your screen dimensions:



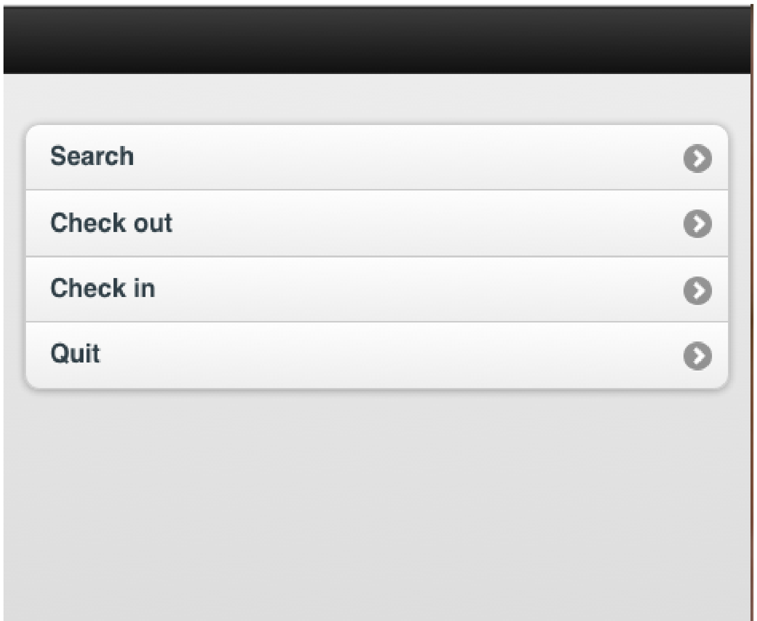
Enter your account number, email address and password and touch the "Enter" button.

Note: Unlike the usual login page, it is impossible to reset or change a password through this interface. Although you can still do it if you access **ActiveWeb™** through the standard address.

11.2 Home

After logging in, the "Home" section lets you choose between different actions:

- Search: lets you find items and view basic information.
- Check Out: lets you check "OUT" items (i.e. telling the system a recipient is taking out a box or file from its previous recipient or location) by scanning the item or by entering the RC Numbers of items.
- Check In: lets you check "IN" items (i.e. telling the system a recipient is bringing a box or file back to its designated location) by scanning the item or by entering the RC Numbers of items.
- Quit: logs you out of your session.



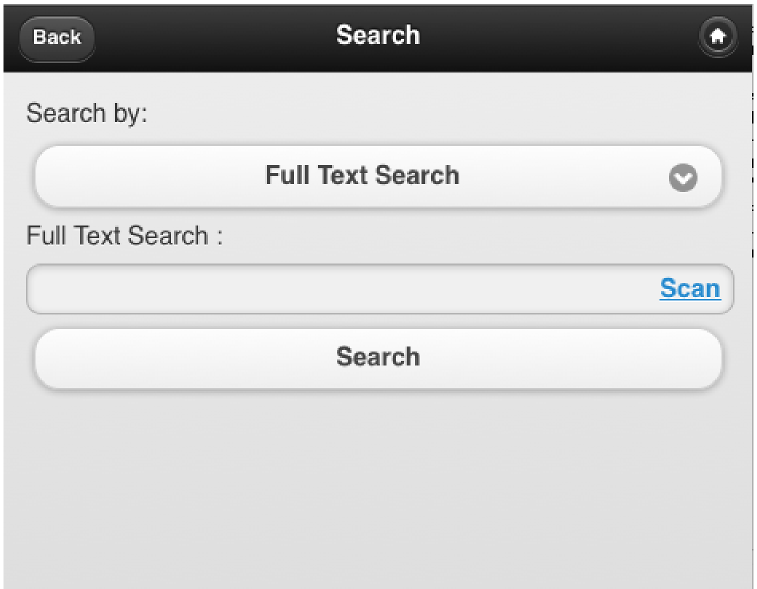
To go back to the "Home" tab, touch the "Home" icon in any of the sections or touch the "Back" button until you reach it:

11.3 Search

1. Select a search type in the drop down field at the top of the window.

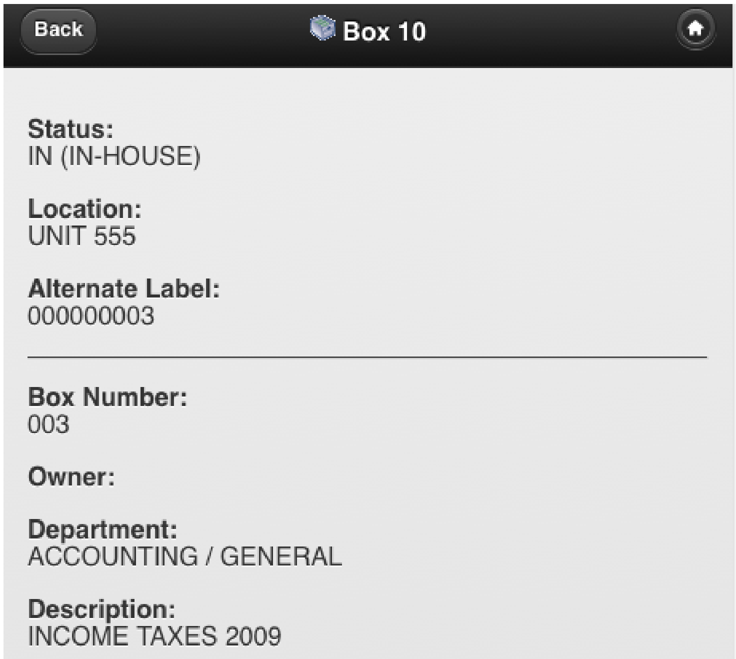
2. Enter your search criteria or keyword in the empty field below.

Touch the "Search" button to initiate your search.



3. The search results appear on screen.

4. To view an item's details, click the one you wish to view.



5. To go back to the search results, click the "Back" button. Click it twice to enter a different search criteria.

11.4 Check In

Checking "IN" items (i.e. telling the system a recipient is bringing a box or file back to its designated location) can be done two ways:

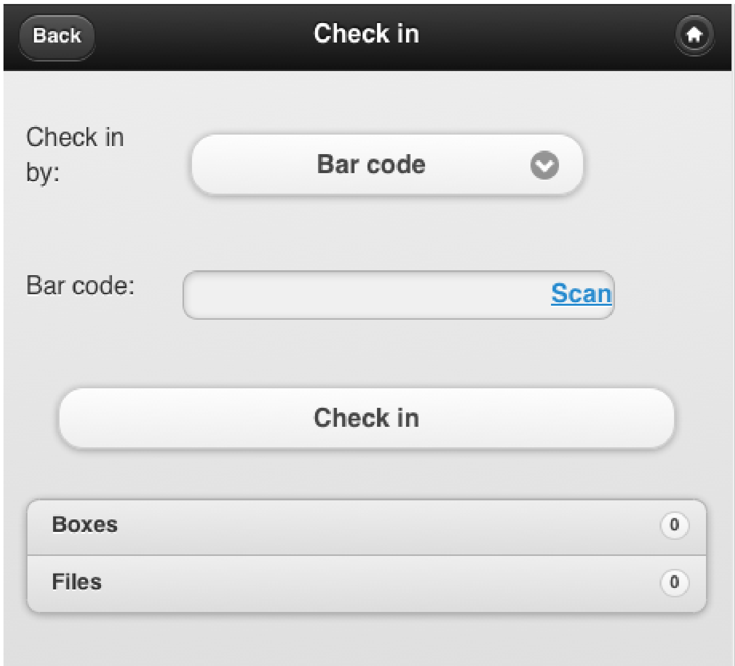
- by scanning the item's bar code;
- or by entering the item's RC Number.

1. Start by choosing the "Check In" mode: Bar code or RC Number.

2. Scan the Bar code or enter the RC Number in the field.

3. Touch "Check In".

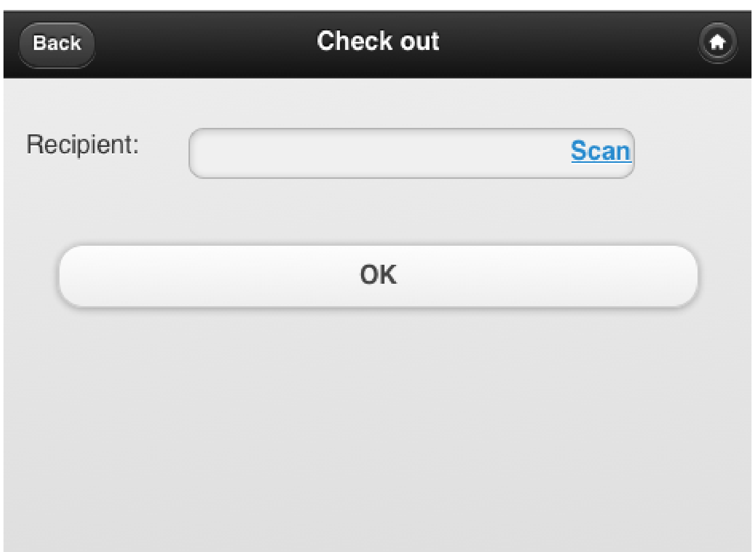
Note: The total number of each item type (box or file) checked in will be updated at the bottom of the screen.



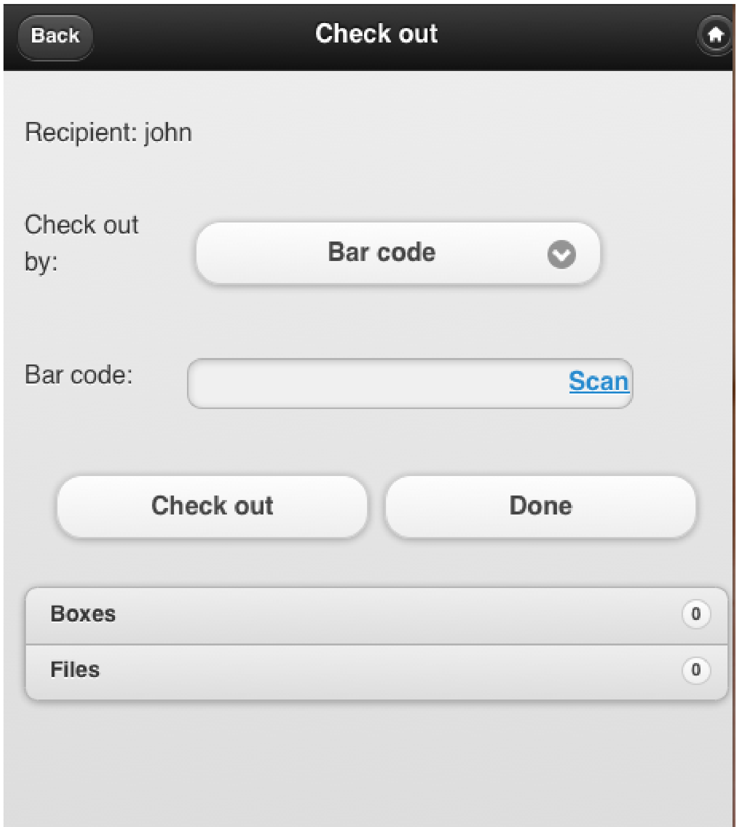
11.5 Check Out

Checking "OUT" items (i.e. telling the system a recipient is taking out a box or file from its previous recipient or location) by scanning the item's bar code or by entering the RC Numbers of items.

1. Start by entering the Recipient's name. Touch "OK".



2. Choose the "Check Out" mode (Bar code or RC Number).



3. Scan the Bar code or enter the RC Number in the field.

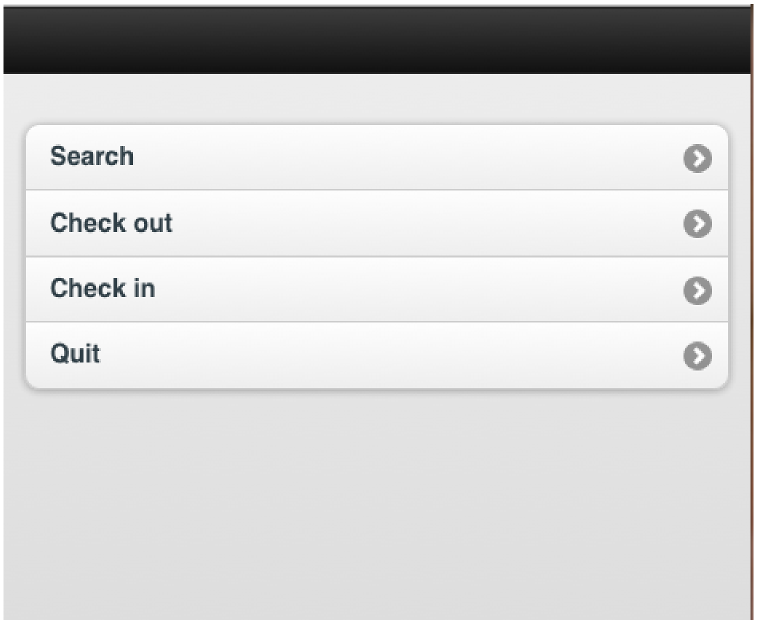
4. Touch the "Check Out" button.

Note: The total number of each item type (box or file) checked out will be updated at the bottom of the screen.

5. Touch the "Done" button when you want to change the recipient or if you want to stop checking out items.

11.6 Quitting Your Mobile Session

To quit your mobile session, go back to the "Home" tab and touch the "Quit" button.


Search
Check out
Check in
Quit

12 Glossary Of Terms

- A -

Active Records
A document or record, no matter the format that is made widely available and commonly used before it is archived or destroyed.

Account Number
This number is assigned to you by your record center upon sign up and is given to you. This unique number is assigned to an individual user, organization or company.

Archives
A place in which archival records or other important historical documents are permanently kept.

Avery™ Labels
Avery™ labels (a U.S. based company) are commonly sold and available on sheets. These labels are sold in different sizes and can be attached to files, boxes, shelf locations, etc. Avery™ labels are widely used because they can be printed on laser or ink jet printers.

- C -

Change of Hands
Changing the recipient of an item.

Check In
Performing a "Check In" tells the system a user is bringing the file or box back to its original location (e.g. file room, cabinet, shelf, etc.) or making the electronic document available to other users.

Check Out
Performing a "Check Out" tells the system a recipient is taking a file or box from its assigned location (e.g. file room, cabinet, shelf, etc.) and is now in the recipient's possession. For electronic documents, a recipient takes control over documents while other users can continue to view it.

Concurrent User Licenses
A software license that is based on the number of simultaneous users accessing the program (e.g. a 2 user license would allow any 2 people to be using **ActiveWeb™** at any one time).

Confidential Disposal
This type of disposal is usually reserved for documents containing highly delicate or confidential information. Typically, confidential disposal must respect certain rules for shredding size and disposal methods.

- D -

Digitize
To scan paper documents and pictures into a digital format that can be processed by a computer.

Disposal
The process by which physical items are destroyed and eDocs are deleted. (See also: Confidential Disposal and Never Destroy).

Department
A department describes the administrative unit to which an item belongs. It can be used to restrict items from being viewed by other department users.

Document
A piece of written, printed, or electronic matter that provides information or evidence or that serves as an official record.

- E -

eDocs (Electronic Documents)
Electronic documents in the media format (e.g. Word, Excel, images, emails, etc.).

- F -

File
An organized collection of related data arranged into records that are stored together and stored as a unit.

Filtering Results
Applying rules to reduce the number of less relevant results.

- H -

History
The history refers to the audit trail of an item. It lists changes to the descriptive data and by whom and when each time the item has been handled (e.g. check in, check out, change of hands, location change, etc.).

- I -

Inactive Records
The non-current records of an organization preserved or appropriated for preservation because of their continuing or enduring value.

- L -

Life Cycle
A series of stages a document passes through during its lifetime. The five stages in the life cycle of a record include the creation stage, the distribution and use stage, the storage or maintenance stage, the retention and disposition stage and the archival preservation stage.

Location
A location can be a file room, cabinet or office and could even be smaller (e.g. part of a shelf). Locations are used to manage your physical documents on and off site efficiently so you can track where your items are at any given time.

Look up Value
A look up value is a value within a drop-down list (i.e. choice list of items). Look up values in **ActiveWeb™** are ordered numerically or alphabetically no matter the order in which they were created.

- M -

Metadata
When dealing with records management, information is usually organized with description fields known as metadata fields. There are many customizable metadata fields for files, boxes and eDocs. Each field describes an aspect of the item. Typically, metadata fields include:
- File or box number
- Description
- Start date (the date the item was created)
- End date (the date the item should finish its ‘active’ life or be destroyed)
- Department or owner

- N -

Never Destroy
This means the item will not be destroyed once it reaches the end of its active life cycle. It will forever be kept for reference purposes (e.g. classified or confidential documents).

- R -

RC Number
This unique number is automatically assigned by **ActiveWeb™** to the item upon its creation. It is used by the system to accurately track the item’s every move.

Recipient
The recipient is the person that receives the item (file or box). This person may or may not be a user in **ActiveWeb™**.

Record
Recorded information regardless of medium or characteristics that has been created or received by an organization and has been used by that organization as evidence of its activities or because of the information contained.

Records Management
The planning, controlling, directing, organizing and other managerial activities involved with respect to records creation, maintenance, use and disposition in order to achieve adequate and proper documentation of the policies and transactions of an organization.

Recycle (Non-Confidential Disposal)
This type of disposal is for documents that are to be shredded or recycled.

Retention Schedule
Also called record control schedule, record disposition schedule, records schedule or document type; a retention schedule is seen as a detailed description of:
- The reason why a physical record or electronic document should be kept (e.g. legal, fiscal, historical, etc.).
- The length of time a document is retained as an active record (see Active Records).
- How the record will be disposed of at the end of its active life cycle (e.g. destroyed or archived for a specific amount of time).

- U -

User
A user in **ActiveWeb™** can login directly by using their account number, email address and password. User rights vary by individual to access some or all the information managed by **ActiveWeb™**. Each user can have a different set of rights to view, modify, add or delete items.