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DocuData's ActiveWeb 5.57 User Manual

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Please take note that the product formerly called 'EDC RC Web' is now named 'EDC ActiveWeb'.

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1 Introduction

1.1 About This Manual

Welcome to all EDC RC Web users

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

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 13 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.

- DocuData Software

1.2 Prerequisites & Technical considerations

Prerequisites and technical considerations

You 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"**. 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.

Also note that even though ActiveWeb works with the majority of internet browsers in use today, its performance is at its best when using either Internet Explorer 8, Firefox 3 or Google Chrome.

If at any point you are having some technical difficulties accessing or using the software with issues not covered in this manual, 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 don't have them already please consult your record center.

1.4 Signing In or Logging Out of ActiveWeb

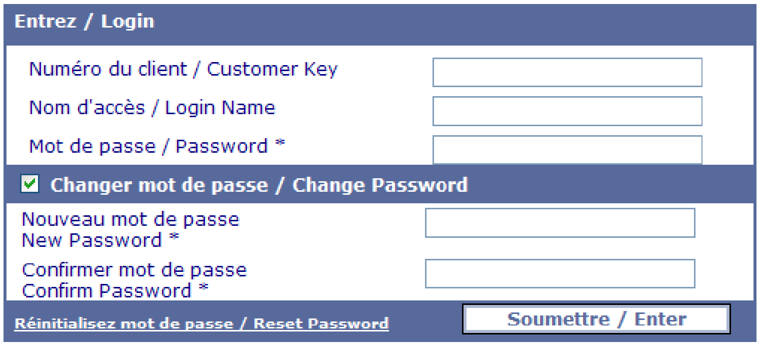
ActiveWeb is accessed via the internet. If you don't already have the internet address of ActiveWeb please ask your record center.

The first thing you see when accessing ActiveWeb is the login page like so:

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

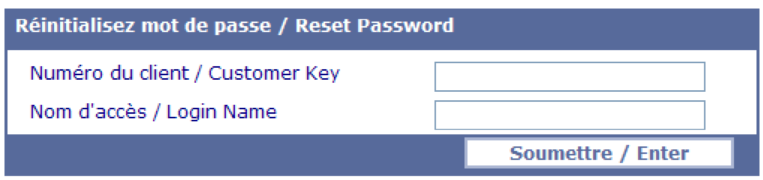
<u>Logging into ActiveWeb</u>

- To login you simply 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" checkbox. Additional fields will appear like so:



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):

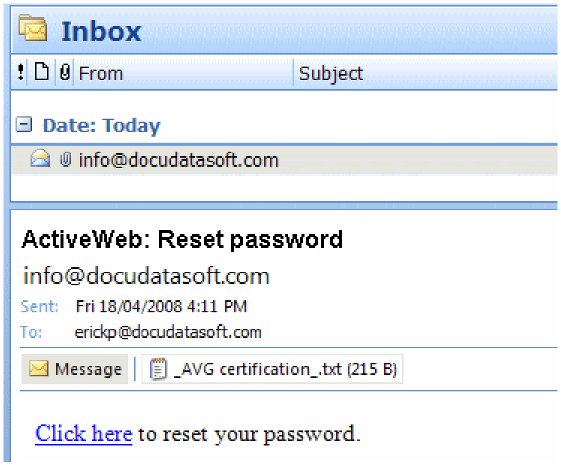


After pressing "Enter" you should get a message that an email message has been sent to you:

If for some reason the email didn't go through, you should get a message like so:

In which case you should contact your record center and let them know. As the message says, it probably is just that you have no email address configured in your account at the record center.

Once the email goes through you will receive it in your mailbox and it should look something similar to this:



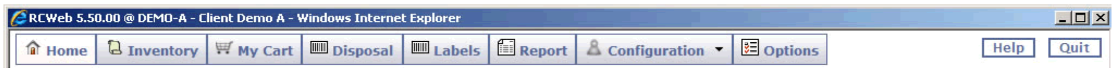
When you click on the link in the email, you will be directed to a page on the web where you can choose a new password for yourself like so:

Logging Out of ActiveWeb

At the top of the ActiveWeb window you will see a series of tabs. To exit, click the "Quit" button at the far right.

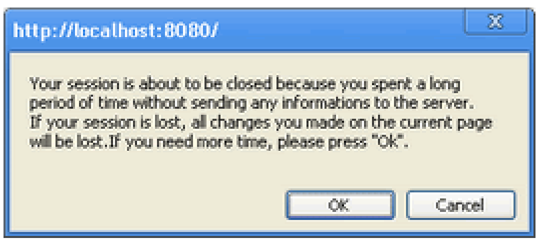
1.5 Navigating in EDC ActiveWeb

- 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 on your browser to navigate.
- At the top of each page in **ActiveWeb**, there is a **button bar** that allows the user to navigate between the different modules:



Button Bar

- 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.

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- 5.50
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  - 9001 Add the Box userfield1 to the ActiveWeb order confirmation 67 for boxes and files.
  - 9009 Add the Box userfield1 to the ActiveWeb order confirmation 67 for auto inventoried file
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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 company.
(See Holidays 102 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.


Home
Inventory
My Cart
Disposal
Labels
Report
Configuration
Options
Help
Quit
connect
DocuData
Holidays of the record center for the 7 next days
Date
Description
2009/04/29
Test Holiday (Record Center)
A
Announcement
The record center usually will use this place to make special announcements available to its customers.
As you can see you can also put images here.
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B

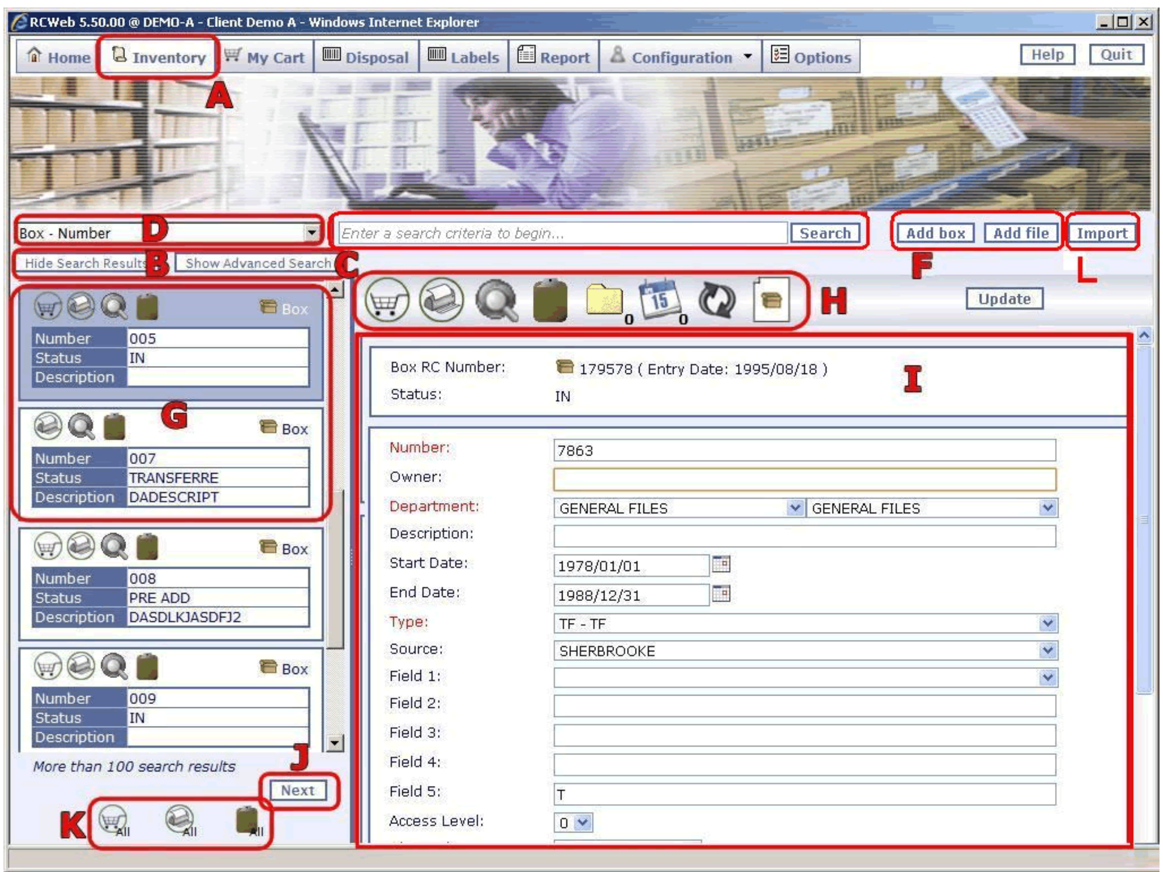
3 Inventory Tab

3.1 Inventory Tab Layout

The inventory tab is used to:

- Add boxes and files to your inventory.
- Query and edit information for existing inventory.
- Order items for retrieval from or return to your record center.
- View and modify your list of "Favorite" items.
- Add or remove items from a work list, which may be used for various purposes including creating a disposal list 81
- Add items to a label print list 87.

The following images highlights key features of the inventory tab. The RED letters on the screenshot are referenced by the text below.



In the picture above:

⊟ A.

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

⊟ B.

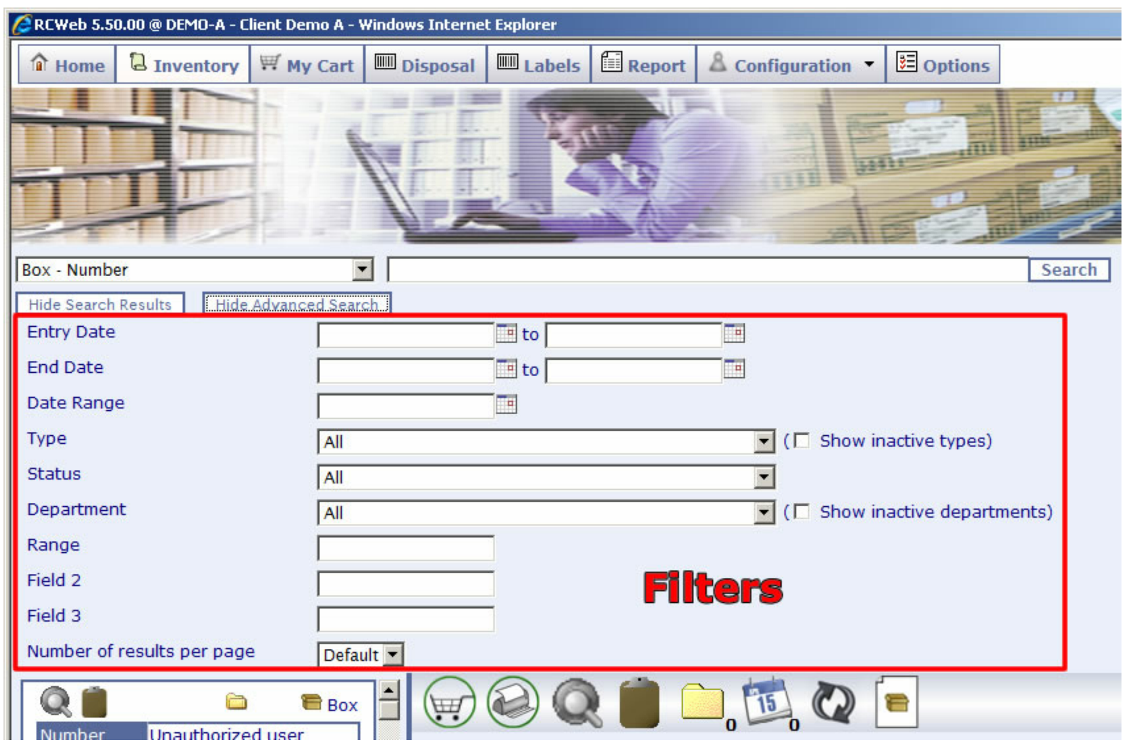
The "Hide / Show Search Results" button toggles the list of search results, (indicated by the letter "G" on the picture above), off or on. Note that the search results can be moved to any side of the screen (Top, Bottom, Left or Right) if you wish. You can configure this in the "Options" 105

tab.

C.

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

Note: A little warning box beside the Show/Hide Advanced Search button (See below) indicates if filters are active. Depending on your authorized user options 105**, filters may be remembered from one session to the next. Forgotten active filters are a common reason for not being able to find the expected items with a search.**



Search Filters

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 - Advanced search, and many others.

E.

This is the place where you enter your search keywords. Click on the "search" button 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 tab 105.

F.

These are the buttons you use to add a box or file to your inventory. See "Adding or deleting a box or file" 28 and take note that procedures for adding boxes vary.

G.

These are results. Search results may be hidden by clicking the Hide Search Results button. Search results may also be repositioned and made to include different fields using the Options Tab 105.

⊟ H.

This is 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 your item on an order from the record center or return the item to the record center. More information about the specifics of ordering is contained under the "My Cart Tab" 58 section later in this manual.

Add to Print List

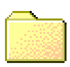
This icon is used when you want to place your item's label on a print list. Then when you are ready to print your labels you browse to the "Labels" tab and print them from there. More information about printing labels is contained under the "Labels Tab" 87 section later in this manual.

Add to Favorites

This icon enables you to "bookmark" or place an item on a list of favorites. You can then go back to your favorites to quickly access the items you've 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 35 topic later in this manual for more information on work lists.



Files

Clicking on this icon will bring you directly to the files section of the current record.
A number indicates how many files are indexed in the box currently displayed.

Rotation Schedule

Clicking on this icon will bring you directly to the schedule section.
A number indicates how many delivery dates are scheduled for the current box or tape. .

Notes

Clicking on the icon will bring you to the notes section of the page where you will be able to view them.

Refresh

Clicking this icon will update the information for this record based on what is in the database. This may be necessary if someone else is working with the data for the same record.

Print Box Details

Clicking on this 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 icons pertain to files only:

View the box containing this file

If you need to refer back to the box that contains this file, click on this icon.

Images

Clicking on the icon will bring you to the images section [49] of the file record.
A number indicates how many images are attached to the file.

Print File Details

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

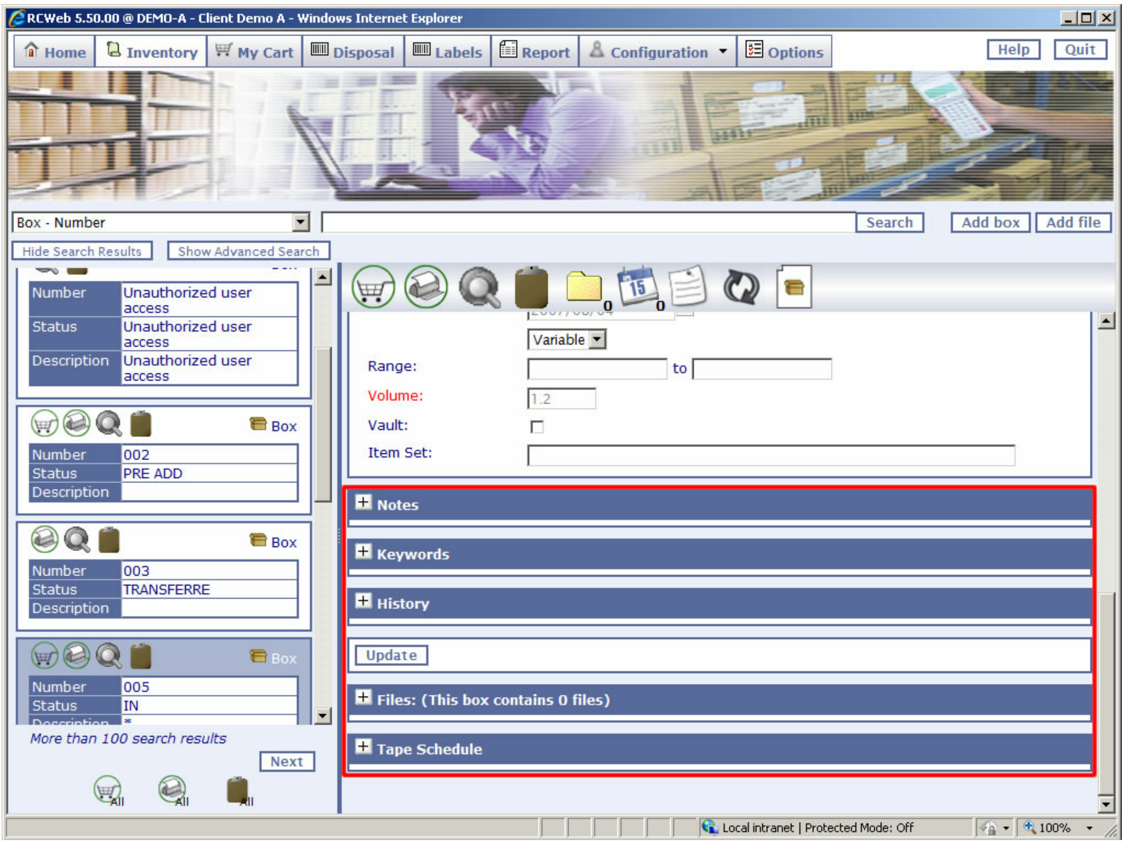
Note: You will need a PDF reader to view these reports. PDF readers are available free of charge from many sources including http://www.foxitsoftware.com/

Documents

Clicking on the icon will bring you to the documents section [38], 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. By scrolling down this section you will find different areas of interest such as Notes, History, Files, Schedules, Images (when viewing file information only) etc.



J.

Here you will find a "Next" and "Previous" button that you can use to scroll up and down the search results. The maximum number of search results per page is customizable from the "Options" 105 tab. By default ActiveWeb is set to display 10 items per page in the search results.

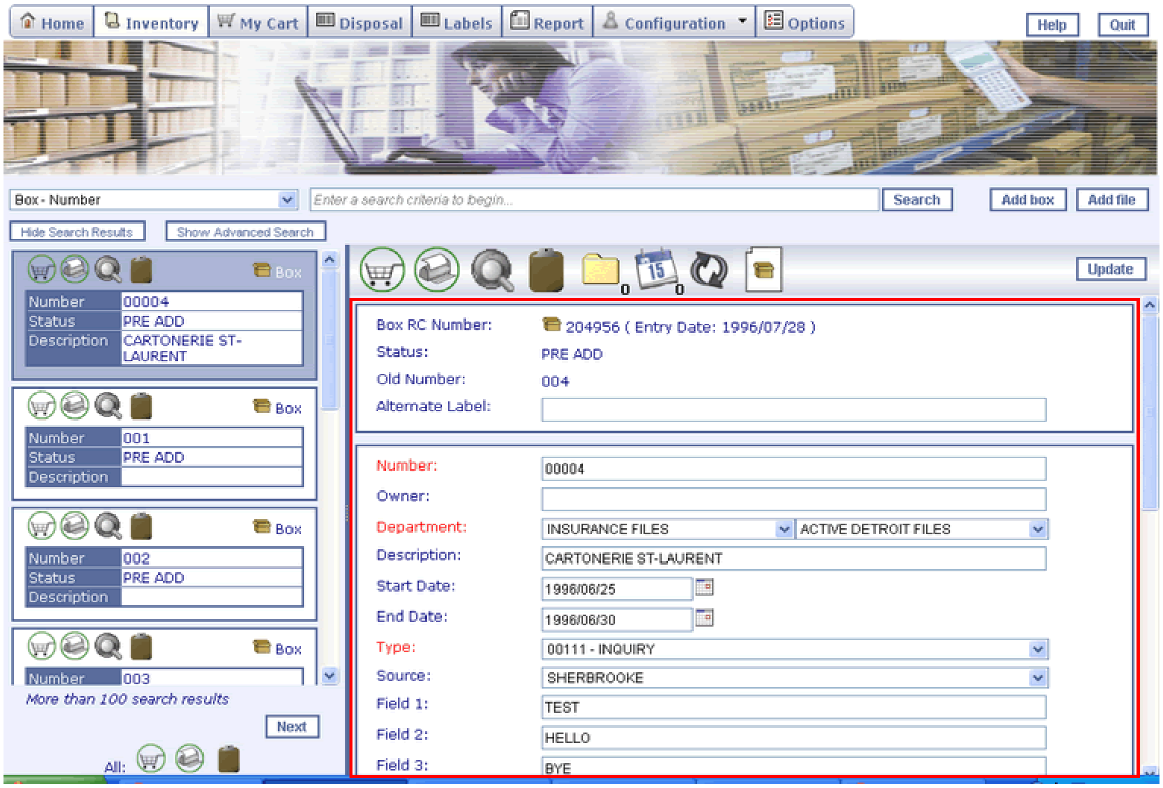
K.

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 print list, work list and/or to an order. More information about orders and label printing can be found in the "My Cart Tab" 58 and "Labels Tab" 87 section of this manual.

L.

This button is used when you want to import many articles in the inventory at the same time. For more information consult the Importing information 37 topic.

3.2 Description of Default Fields



Note: Fields in ActiveWeb may be renamed, hidden, or made mandatory according to the needs of your organization. The following is a list of the default fields and how they may be used. Fields labeled in red are mandatory. **When in doubt, please ask your record center.**

Field Descriptions

Status

Read-only field that can take values "PRE ADD", "IN", "IN-HOUSE" "SELECTED", "OUT", "TO DESTROY", "DESTROYED", "TO TRANSFER", "TRANSFERRED", "TO DELETE", "DELETED". This field indicates the current state (activity can also be used) of a box or a file. This field is automatically updated to reflect the operations made on boxes or files. 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.

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 loaned to. You can change the recipient of an item (this action is also called a change of hands) by simply 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 a more proficient way of managing your recipients 103.

RC (Record Center) Number
Read-only numeric field. This number is automatically and sequentially assigned by the system. 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 EDC box and file bar codes.

Old Number
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 let you know if should fill in this field, which allows the tracking of your items using bar codes produced outside EDC.

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 a 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
Required (for boxes only) alphanumeric field containing a maximum of 20 characters. Depending on your account settings and the status of the item, this may be read-only. Examples of valid values include: 100, 100-01-01, TB-00002.

Owner
Optional alphanumeric field containing a maximum of 20 characters.
This field indicates to whom the box or the file belongs. It is not used by the system. This field is frequently assigned for other purposes.

Department
Required drop-down alphanumeric field containing a maximum of 30 characters.
This field 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 by your record center or through the Departments 94 section of the Configuration Tab.

Description
Optional alphanumeric field containing a maximum of 40 characters.
This field contains the description of the item. Note that 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 records in a box or a file. The disposal date will be

calculated by adding the conservation 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.

Type
Required drop-down alphanumeric field containing a maximum of 10 characters.
This field describes the document type of the retention schedule by which the disposal date of a box or a file is controlled. Document types may be configured by your record center or through the Retention Schedules 97 section of the Configuration Tab.

Source
Optional alphanumeric drop-down field containing a maximum of 10 characters.
For boxes, this field indicates the location where the box came from before arriving at the off-site record center.

Field 1 / Field 2 / Field 3 / Field 4 / Field 5
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.

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

Disposal
There are three fields related to disposal :

1. The disposal method, 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 conservation 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
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.

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-HOUSE'. If it is IN (IN-HOUSE) the field will show the box's present location. While if it is OUT(IN-HOUSE), the field will show the box's last assigned location.

For files, the field shows the physical location of the file. It can either be a box (designated by number) or a shelf.

For files stored IN-HOUSE (at the customer location), the location can be a box (designated by number) or a shelf location.

To manage locations at the customer site (IN-HOUSE) consult the Managing locations 30 topic.

Volume
Read-Only field that indicates the volume of a box, or the key associated to the box type.

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

Item Set
This field allows you to associate an item to an item set. When one item belonging to an item set is placed on an order, all the available items associated to that set are automatically placed on the order as well. (Items can then be removed from the order if necessary.) To associate an item to an item set, simply type the item set name or description.

In the same way that boxes and files may be added to the same order, boxes and files may be added to the same item set.

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.

When data is imported from a spreadsheet, if the data is too long for the field (eg. the description field allows 40 characters), the first 39 characters of the data will be placed into the field, followed by'*. The full data will appear in the notes field (eg. "DESCRIPTION: Cash vouchers [...]")

Notes fields are included in the full text search index.

Keywords
Alphanumerical field used to add new keywords to an item. Keywords are very useful when using the Full Text Search choices (see Searching for a box or a file 24.)

History
Read-only field that displays the history of the record, including changes to the descriptive data as well as handling of the item.

—

The following field describe Boxes only

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

At the bottom of the file section the are fields that allow you to order files which have not yet been indexed, from that box.

—

The following fields describe Files only

Documents
This section allows you to work with electronic documents associated with a file.to a file. For more information please see the section of this manual on the document 38 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 please see the "Imaging Options" 49 section of this manual.

The following fields describe Locations only

Item type
Read-only field indicating that the item is a location.

Used
Read-only field indicating the quantity of items presently IN (In-House) in this location.

Out
Read-only field indicating the quantity of items assigned to this location that are presently OUT (In-House)

Location
This modifiable field contains the name of the location (e.g Office 505)

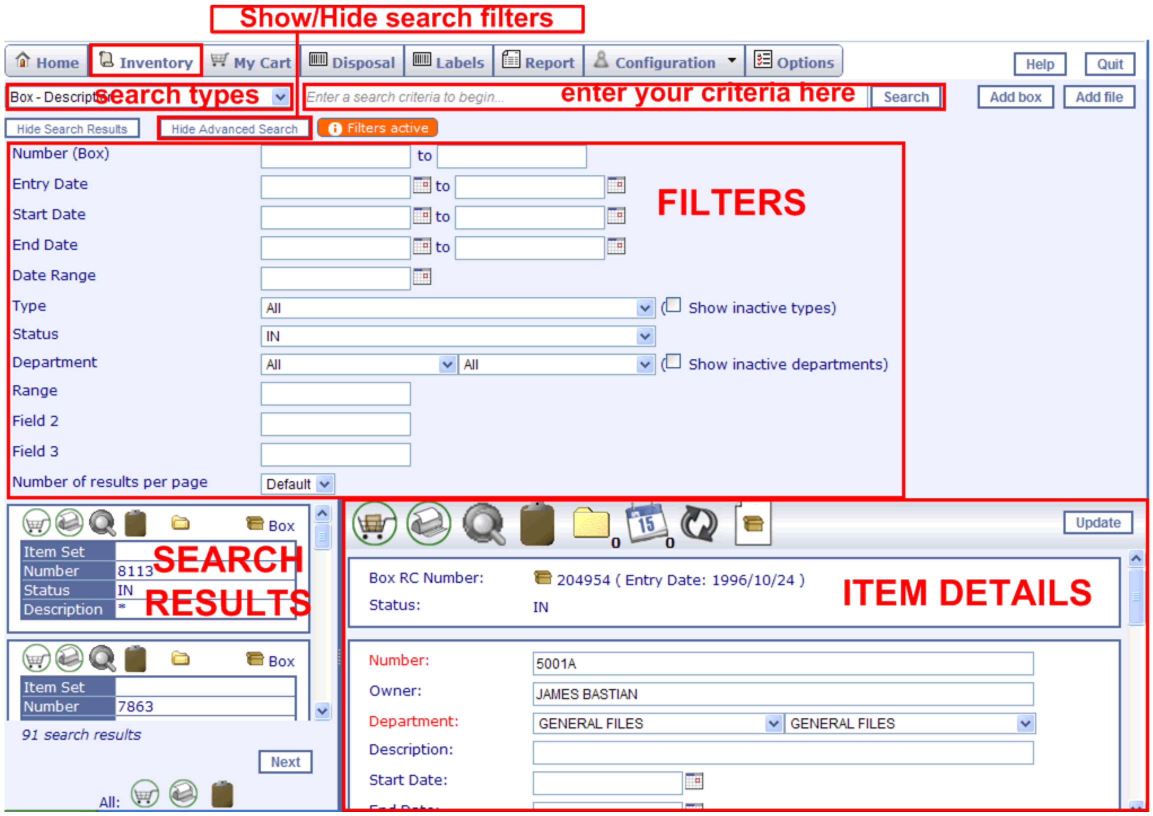
Type
This modifiable field indicates if the location contains boxes or files.

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 screenshot below) to "show" or "hide" the search filters. Search filters give you the ability to narrow down your searches for more precision. The different filters correspond to the box and file fields 18.



Searching for a box or a file

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

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 (see the Fields 18 topics for more information). These filters are available when you click on the 'Show Advanced Search' button; when a value has been entered/selected in one or many fields, a 'Filters Active' warning appears.

Press *Enter* or click on the **Search** button 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

Note: when adding or editing information for a box or file, full text search for the new information won't be available until between 20 and 30 minutes after the edit is completed.

1. Select on of the three full text search types in the drop down field at the left of the window : **Full Text Search- Find all words | Full Text Search- Find any of these words | Full Text Search- Advanced Search**

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 the **Search** button 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.

Note: With the "Advanced Search" option, the search engine lets you enter some "boolean expressions" and will find every item or document according to the expression chosen.

Legend:

A&B means "A and B"
A+B means "A or B"
!A means "not A" (opposite of A)
(A&!B)+C is a sub expression which means "(A and (not B)) plus C

Examples:

If you want to search for a certain box containing the words "fragile" and "document x" you would type the following expression : fragile&document&x or fragile&document x. Be careful not to leave any spaces between the different signs (+, !, &) and the words. Also, do not put any periods at the end of expressions because it could modify the search results.

If you want to search for a box containing the word "document" but not the word "fragile" you would type the following expression: document&!fragile.

If you want to search for a box containing the word "document" and the word "company" but not the word "fragile" you would type the following expression: !fragile&document&company. Note that the order in which the words are placed doesn't matter and so document&company&!fragile would give the same results.

If you want to search for a box containing the word "document" or the word "company" but not the word "fragile" you would type the following expression: (document+company)&!fragile.

Note: The searches are not case sensitive if cases are not mixed in the same word but do become case sensitive if mixed. So for example if you search for documents that have the word "montreal" in them, these 2 will work:

MONTREAL, montreal

but not:

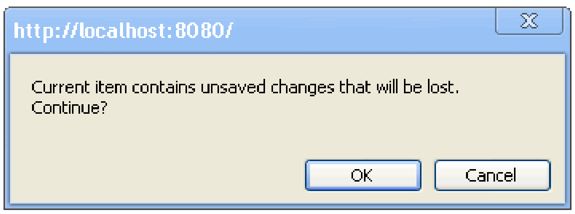
Montreal

and since in most EDC fields the case are always uppercase, then you should not mix cases when performing a search. By default we always simply do our searches in lower case.

3.4 Editing Box or File Information

1. Search [24] for an item to edit.
2. Enter the new information in the required fields [18] (the compulsory fields are in red).
3. Click on the **Update** button at the bottom of the window. 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 shave your changes, click the "Cancel" button on the dialogue, then click the **Update** button as in step 3 above.



To add | edit notes or keywords

1. Click on the (+) sign besides **Notes | Keywords**
2. A window appears below the title of the field.
3. Add or edit notes | keywords.
4. Click on the **Update** button at the bottom of the window.

Note: Keywords are particularly useful when using the Full Text Search options of the *Inventory* module (see Searching for a box or a file [24].)

3.5 Adding or Deleting a Box or File

Adding a box or file

1. Click on the **Inventory** tab.

2. Click on the **Add box** or **Add File** button.

3. A new window appears.

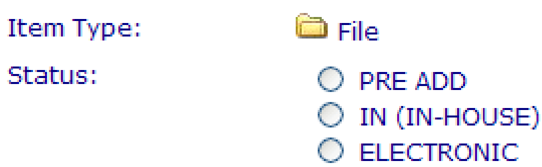
4. Select the status of the box or file you want to add :

For boxes

PRE ADD: This is usually a box who's content is meant to go 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.

For files



PRE ADD: This is usually a file who's content is meant to go 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: This file will be used to archive electronic documents only and will never contain any 'physical' documents.

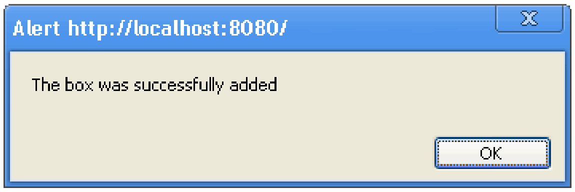
5. Enter the different information of your new box or file (the fields 18 in red are compulsory).

6. Check the *Add to print list* check box if you want to print the item's label.

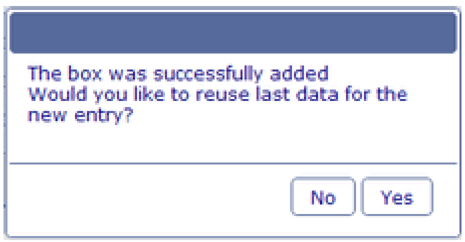
7. To simply view the item you just added select the "*Display the created item"* option in the drop-down list. To create another item after that select the *"Create another item"* option in the drop-down list.

8. When all the information has been entered click on the **Add** button at the bottom of the window.

If you have selected the "*Display the created item*" option, a confirmation message pops up:



If you have selected the *"Create another item"* option, the following message appears:

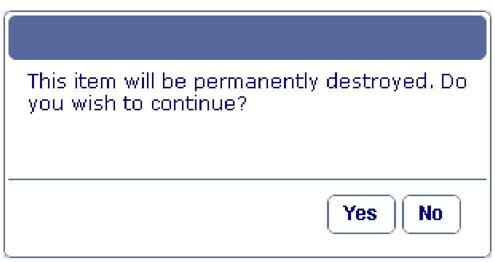


Press *Yes* to reuse the same information and fasten data entry. Press *No* to enter different information for the next item.

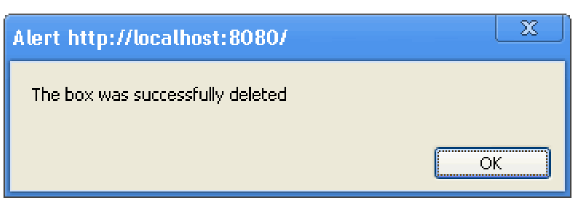
Deleting a box or file

1. Search for a box or file to delete.

2. Click on the **Delete** button at the bottom of the window.



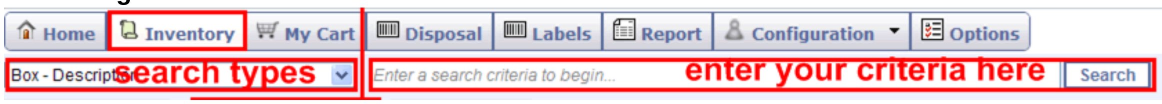
3. Press Yes if you wish to continue. A confirmation message appears.



Note: The box or file must be in the PRE ADD state in order to be deleted.

3.6 Managing internal locations

Searching for a box or a file location



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

2. Enter the location name partially or entirely. Press *Enter* or click on the **Search** button 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.

Adding a location

1. Click on the **Inventory** tab.

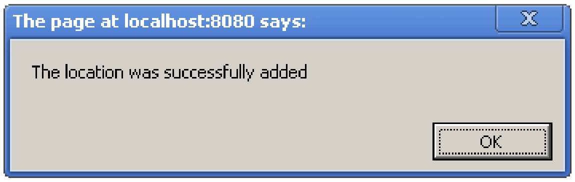
2. Click on the **Add location** button.

3. A new window appears.

4. Enter the information in the different fields 22 :
- 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 the location.
  For a file location, check off the 'Full' box or leave it blank (when it is empty or not entirely full).

5. To simply 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 the **Add** button at the bottom of the window. A confirmation message pops up.



7. If the location is displayed (see step 7) you may add it to the print list buy checking off the printer icon.
To print labels please consult the following topic : How to Print Labels in ActiveWeb87.

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. **Find**24 a box/file.

2. Scroll down to the location field.

3. For a box : Select a location in the drop-down list.
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. Press on the **Update** button.

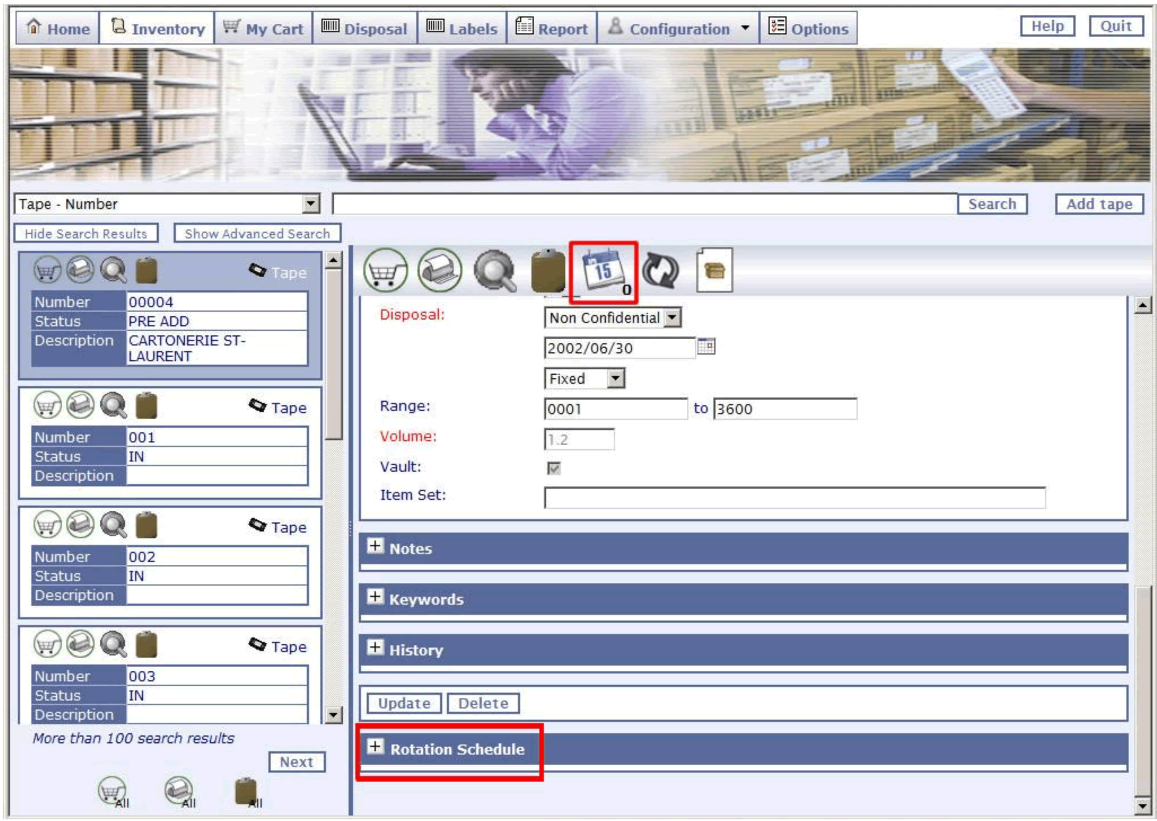
Note: If you wish to indicate that the box or file is either leaving from or returning to its internal location, then consult the Check OUT items69 / Check IN items72 topics.

3.7 Managing a Rotation Schedule

ActiveWeb will check your scheduled delivery dates against record center and customer specific holidays. If you know of company-specific holidays102, it is good practice to enter these102 prior to scheduling your tape deliveries.

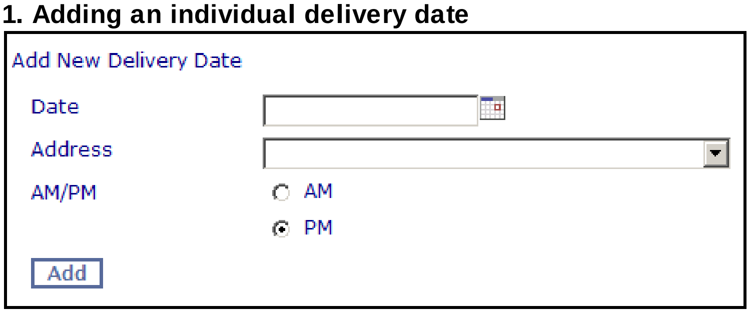
Scheduled delivery dates appear as a calendar icon, with the number of scheduled dates appearing as a number to the lower right. Clicking on this icon will take you to the Rotation Schedule section of the record.

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:

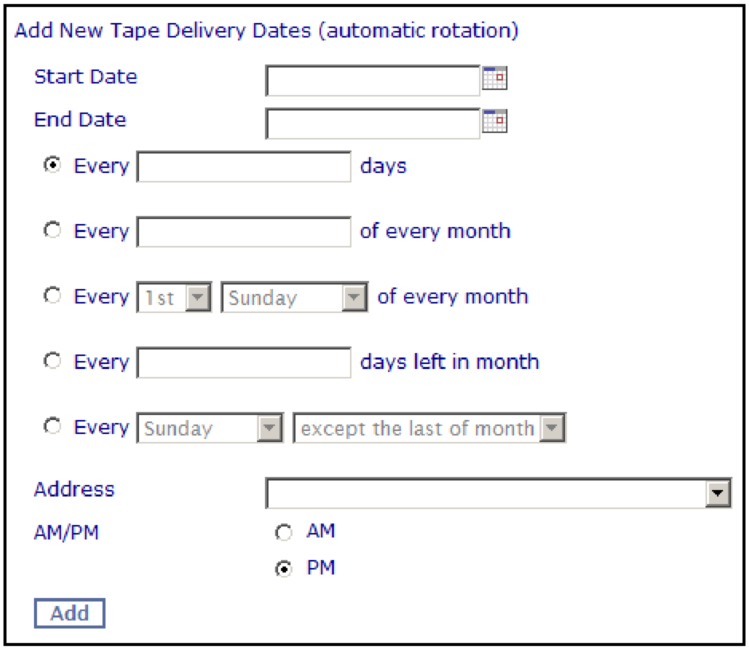
1. Adding an individual delivery date



1- Type a date or select it using the calendar
2- Choose the address at which to deliver the tape
3- Select the preferred delivery time period (AM or PM)
4- Click the "Add" button

2. Adding multiple delivery dates according to a pattern

You also have the option to set a recurring set of dates as seen in the picture 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.

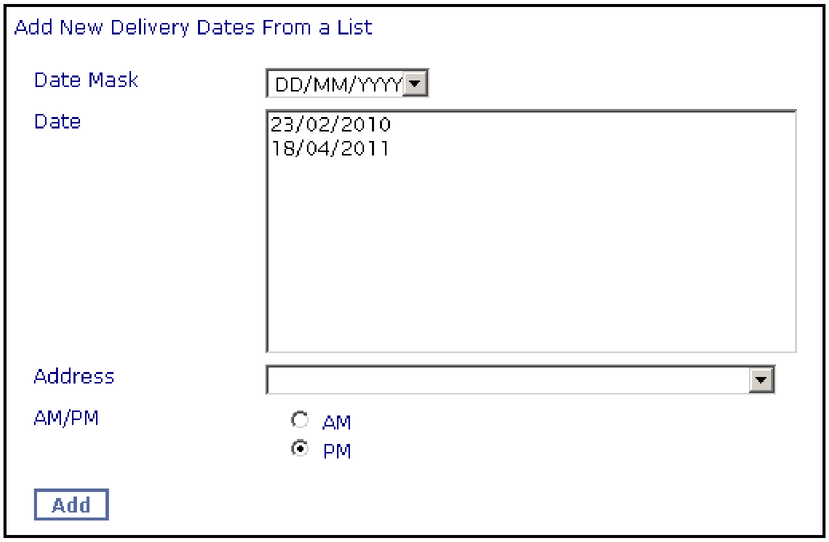
- Every "X" days: If you want the tape/box every 5 days for example you would enter the number 5.
- Every "X" of every month: If you want the tape/box on the 15th of every month you would enter the number 15.
- Every "X" [Weekday] of every month: If you want your tape/box on the second Friday of every 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.

1- Specify the desired pattern, including the address.
2- Click the **Add** button to create delivery dates according to the specified pattern.

3. Adding delivery dates from a list

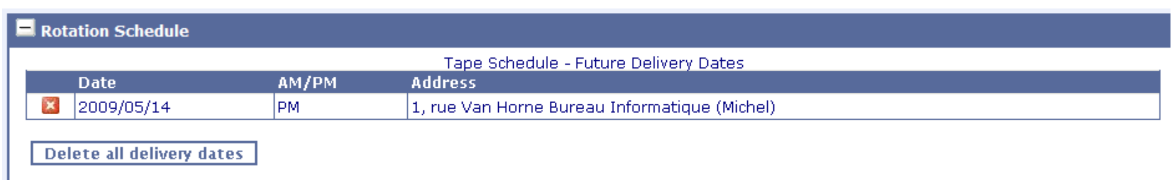
In the third section, you may type or paste in a list of delivery dates.



1- Select a date mask
2- Type or paste in a list of dates, one per line, formatted to match the date mask
3- Choose the address at which to deliver the item
4- Select the preferred time period for the delivery
5- 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 simply click on the red "X" next to the corresponding date.
- To remove all future delivery dates, click the "Delete all delivery dates" button.

3.8 Using the Work list

Work lists can be used to:

- populate disposal lists;
- add many items to a label print list;
- add many items to an order;
- permanently check out OUT items.

Viewing a work list

1. Go in the search types drop down field and select "Work list".
2. Click on the "Search" button. The current content of the work list will be displayed.

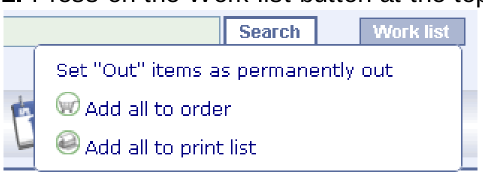
Adding items to a work list (removing items from a work list)

1. Locate the item(s) to add to the list

2. To add an individual item to the work list, click on the empty work list icon, either in a search result list or at the top of the record. The work list icon will change to the full work list icon to indicate that the item is now on the list.
(Clicking the work list icon for an item that is already on the list will cause it to be removed from the list.)
3. To add all items for a page of search results to the work list at once, click the empty 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. (If all items on the search result page are already on the list, then the full work list icon will be displayed, and clicking it will cause all items on this search result page to be removed from the work list.)

Adding a work list to an order

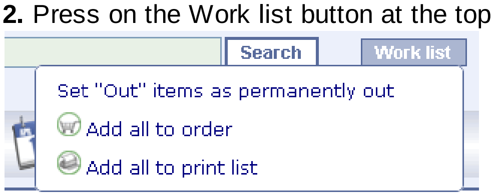
1. Create and view a work list (see above)
2. Press on the Work list button at the top right and select the "Add All to Order" menu item



3. The items on the work list will be added to the order.

Adding a work list to a print list

1. Create and view a work list (see above)
2. Press on the Work list button at the top right and select the "Add All to Print list" menu item

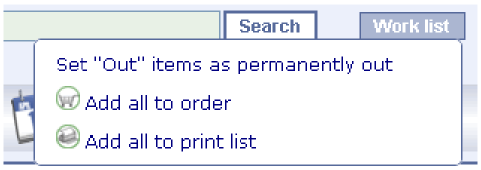


3. The items on the work list will automatically be added to the print list.

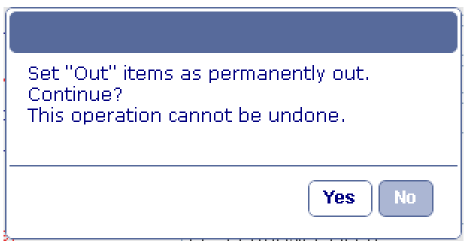
Setting items that are OUT to permanently out (DELETED status)

This action basically informs the record center that the items that are already OUT will stay at your offices 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.

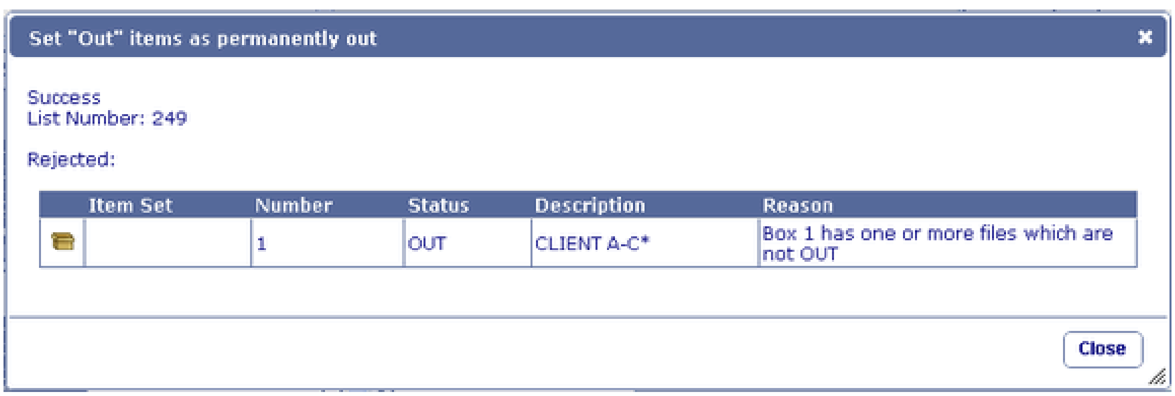
1. Create and view a work list (see above)
2. Press on the Work list button at the top right.
3. From the menu that appears, select "Set "Out" items as permanently out"



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 choose which disposal type you want the record center to use when processing the disposal.
6. Click on "Create List" button to create the list. A confirmation message appears, indicating whether or not a list was created.

7. The 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.

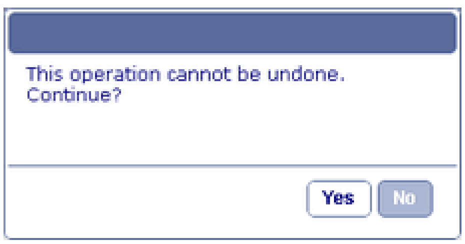
See the topic on working with a disposal list 85 for additional steps.

3.9 Importing information

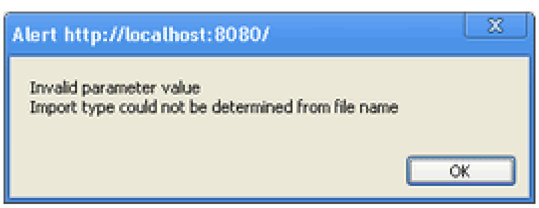
ActiveWeb enables you to import data from spreadsheets that match predefined templates. In order to activate this functionality, it is first necessary to establish templates for import with your record center, and to have them associate these templates to your account. If you wish to be able to perform 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:

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. Press **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**.
(Eg "[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 that it may take up to 30 minutes before these records are indexed for full-text search.)

3.10 Documents Options

The following options are used to manage electronic documents associated to a file. One can view, read, create, edit, email, finalize and delete documents.

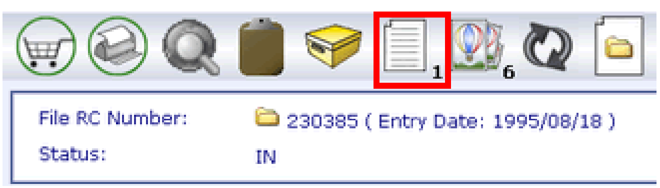
This tab is only available when using the Electronic Document Management version of the web interface. For more information, please contact your record center.

3.10.1 Adding a document

Before being able to add any electronic document and especially edit them, you have to specify a work directory in the Options 107 tab. This only has to be done the first time you log in on a specific computer, or if you want to change directory to another one.

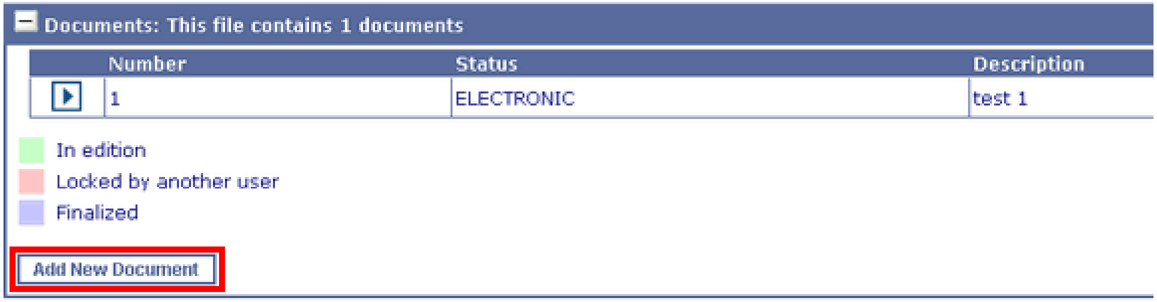
1. Search 24 for a file

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:

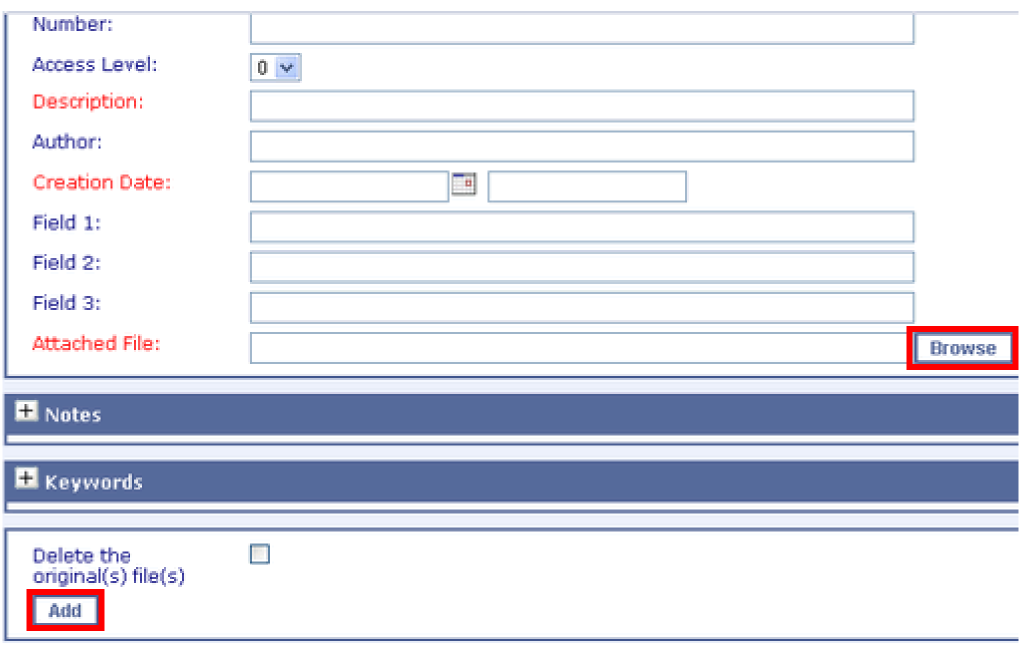


Note: When you are presently modifying a document, it will appear in light green. If it is being modified (locked) by another user it will appear in light red and if it has been finalized (a finalized document cannot be modified) it will appear light blue.

4. Press on the **Add New Document** button. Click on the "Browse" button, select an electronic document and press Open.

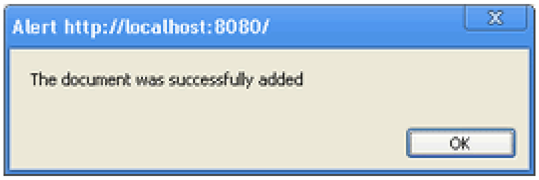
***Note:* A document can be a file, a compressed file (ex: zip) or a folder. Take note that if a folder is added, its content cannot be emailed.**

The compulsory information in red will automatically be entered according to the file's information (if the fields do not have a drop down value). If the information is not the one you want to be saved, simply edit it and fill the information for the rest of the fields 40.



5. Press on the "Add" button.
If you wish to delete the original file, simply check the box (situated on top of the button).

A confirmation message appears.



3.10.2 Description of document fields

Item Type
Read-only field indicating that the item is a document.

Status
Read-only field that can take only value in this case : "ELECTRONIC"

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

Parent file
Read-only field that indicates the file number in which the document is.

Old Number
Read-only alphanumeric field containing a maximum of 16 characters.
When a document number is modified, the old number will be displayed in this field for reference. If the number is changed a second time, then the original number will not be retrievable, at least for searches by old numbers. Effectively, all the old numbers of a document are saved in the document history.

Registration date
Read-only field that indicates the date when a document was added for the first time.

Finalization date
Read-only field that indicates the date when a document was finalized, making it non-modifiable.

Document type
Read-only field that indicates the file extension of the document (ex: doc, vsd, ppt, etc.)

Number
Alphanumeric field containing a maximum of 20 alphanumeric characters.
This field contains the number assigned to the document. The following values are all valid : 100, 100-01-01, TB-00002.

Access level
Numeric field containing a value between "0" and "9" inclusively.
The access level is used to prevent unauthorized users from editing or ordering boxes with access restriction ("9" is the most restrictive access). When editing the field, the user can only assign a value less than or equal to his own level. If the access level of a user is less than the box access level, the user is not allowed to edit or order it.

Description
Optional alphanumeric field containing a maximum of 40 characters.
This field contains the description of the item.

Author
Optional alphanumeric field containing a maximum of 20 characters.
This field indicates to whom the document belongs to and is strictly for internal use for the customer.

Creation date
Compulsory field that is either automatically entered when first selecting the document to add or entered manually if modified before selecting a file. It indicates the date of creation of the electronic document (not to be confounded with the registration date).

Field 1 / Field 2 / Field 3
Optional alphanumeric fields containing a maximum of 20 characters each.

Notes
Alphanumerical field used to add notes to an item (ex: fragile).

Keywords
Alphanumerical field used to add new keywords to an item. Keywords are very useful when using the Full Text Search choices (see Searching for a box or a file 24.)

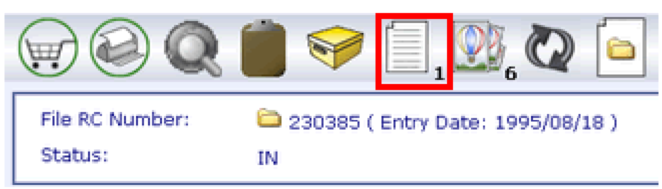
History
Read-only section that indicates all the changes done to a document, as well as all its transfers (from IN to OUT, etc.)

Versions
Section that lists all the previous versions of the document. Each of them can be opened for reading.

3.10.3 Viewing or modifying the information of a document

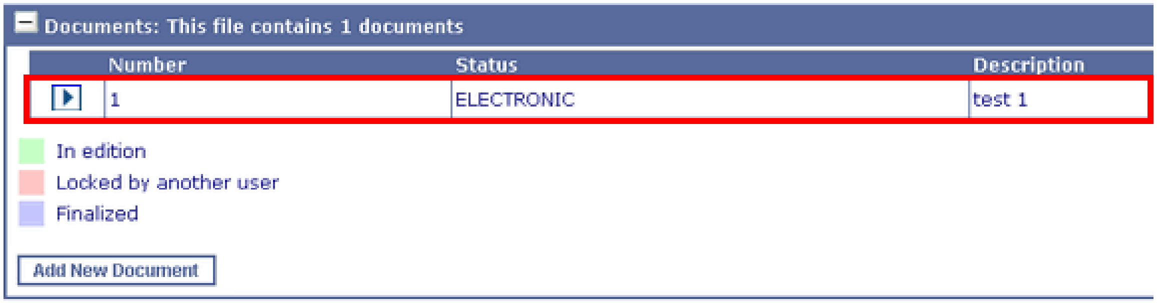
1. Search 24 for a file

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



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

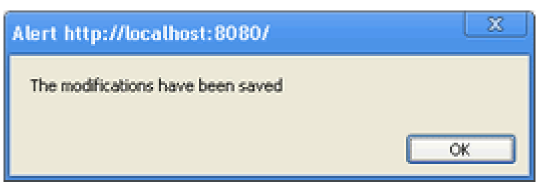
3. This will bring you down the page to the documents section:



Notes:
- When you are presently modifying a document, it will appear in light green. If it is being modified (locked) by another user it will appear in light red and if it has been finalized (a finalized document cannot be modified) it will appear light blue.
- If you have many documents, you can sort through them by number, status or description, simply by clicking on the column title. To sort from lowest to highest click once, from highest to lowest click twice.

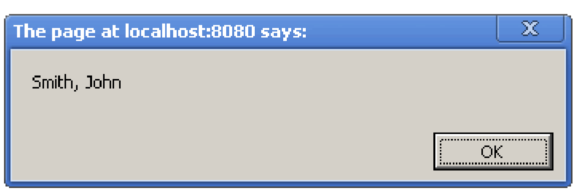
4. Simply click on the desired document. The document's information will appear.

5. Modify the information that you wanted to change (consult the fields 40 section for additional information) and press the "Update" button at the bottom of the screen when you are finished. A confirmation message appears.



Viewing who is modifying a document

Click on the menu button and select 'Check who is modifying the document'. A message with the user's name will appear :

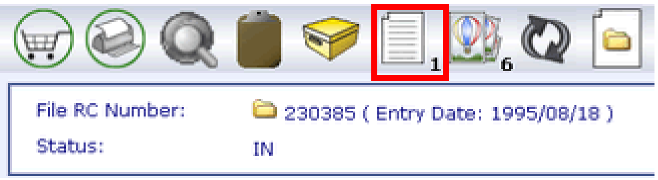


Press **OK** to go back to the document section.

3.10.4 Viewing a document

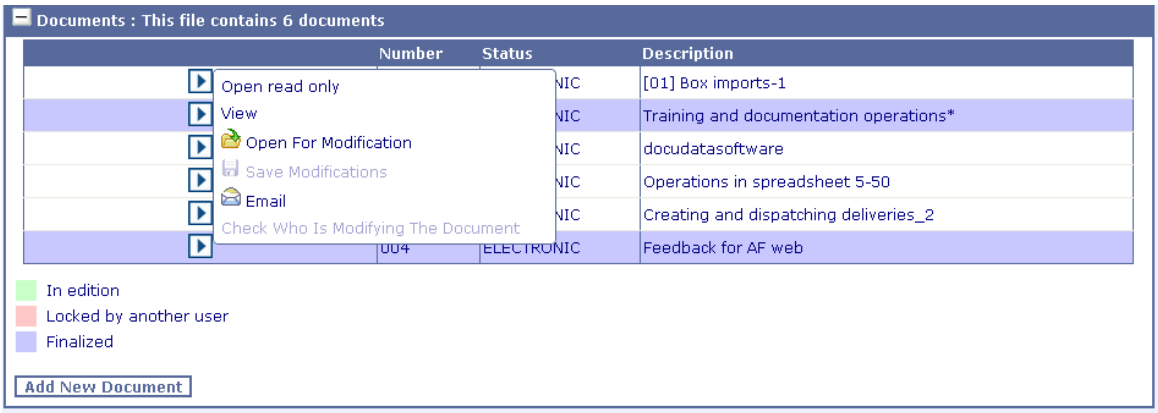
1. Search 24 for a file

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

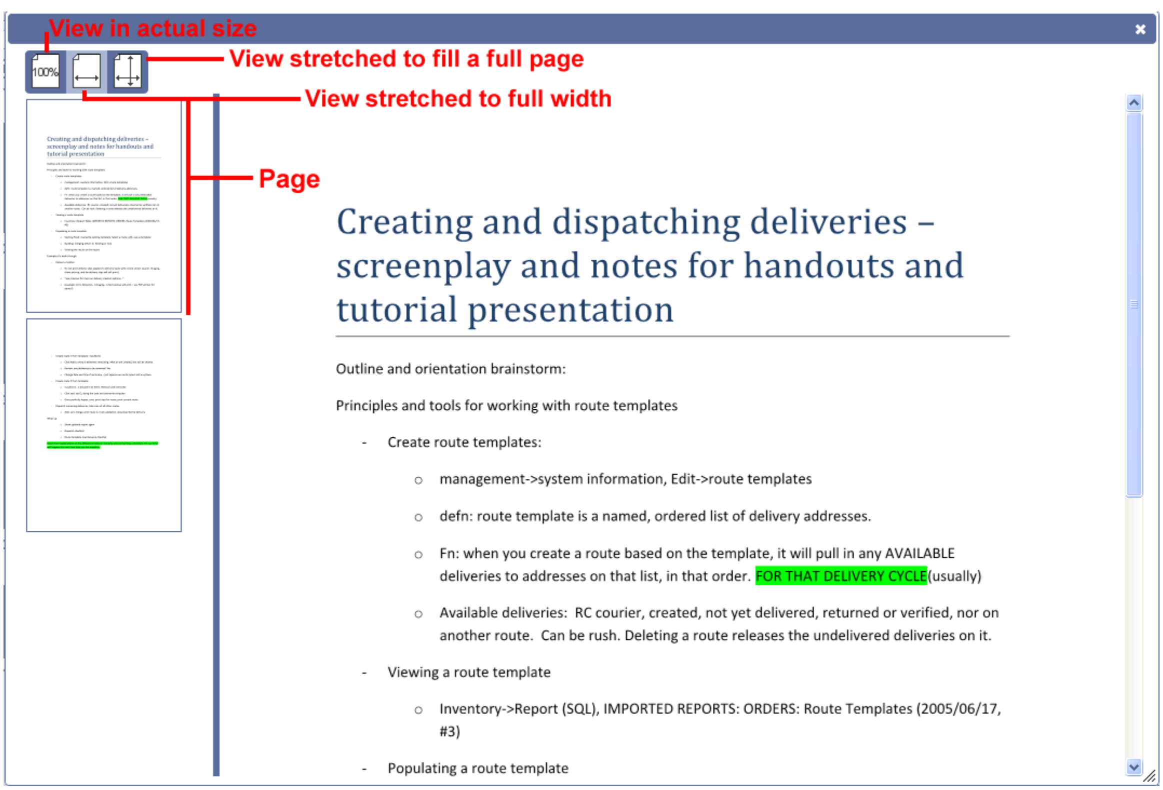


Note: The number beside the icon defines the amount of documents in the folder.

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



4. Click on the menu button 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. When you are finished viewing the document, simply click on the X at the top right corner of the window.

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

From the Document window

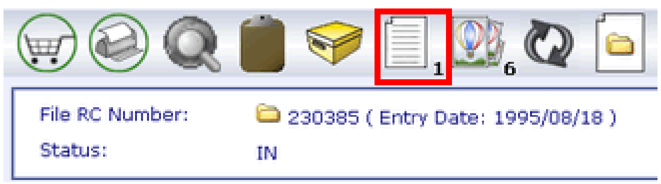
1. If you have already selected the document and you simply want to view it from the window where all the document's information is, simply click on the "View" button located at the bottom of the window.

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

3.10.5 Reading a document

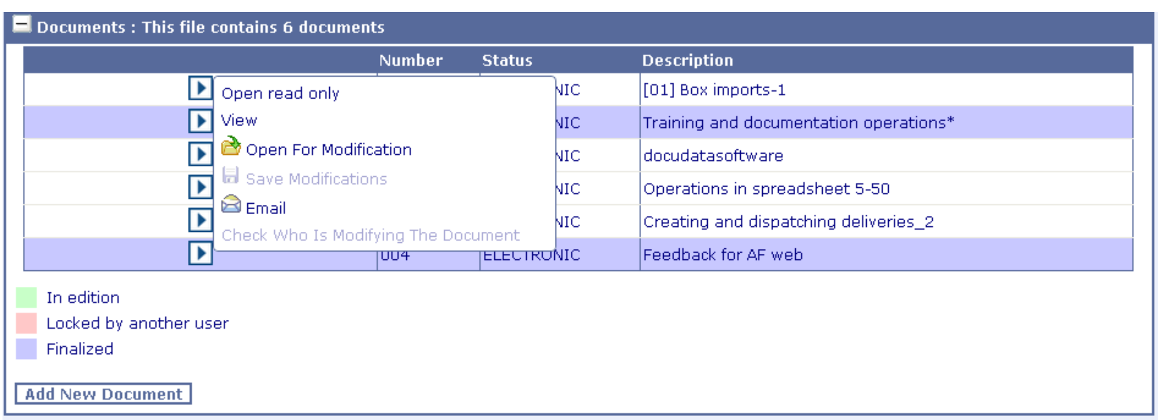
1. Search 24 for a file

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:

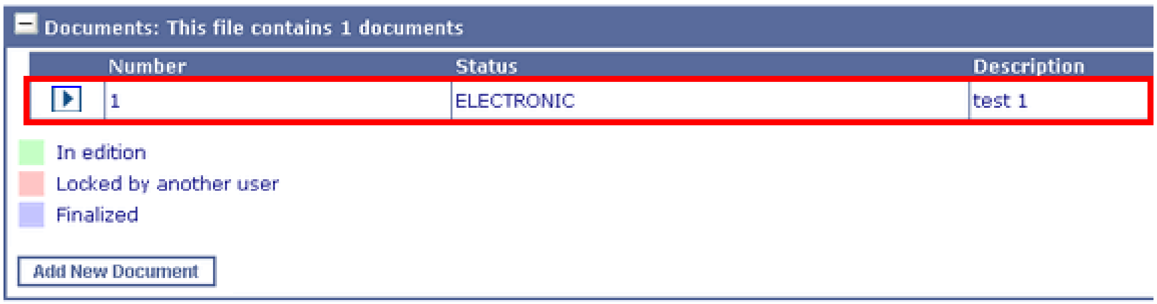


Notes:
- When you are presently modifying a document, it will appear in light green. If it is being modified (locked) by another user it will appear in light red and if it has been finalized (a finalized document cannot be modified) it will appear light blue.
- If you have many documents, you can sort through them by number, status or description, simply by clicking on the column title. To sort from lowest to highest click once, from highest to lowest

click twice.

Here you have two options :

- *To read the latest version :* Click on the menu button  and select "Open read only". This will automatically open the latest version in read-only mode.
- *To read an older version :* Simply click on the desired document as seen in the following window.



Scroll down to the "Versions" section and press on the plus sign to open it. Click on the "Open read only" button beside the version you want to read. This will open the desired version.

3.10.6 Modifying a document

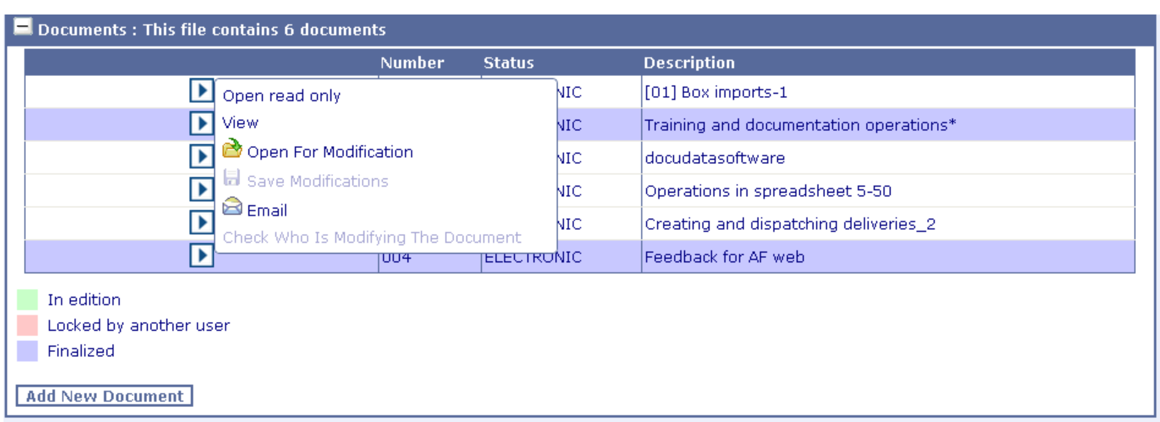
From the Inventory tab

1. Search 24 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:



Notes:
- When a document is being modified by another user it will appear in light green. If it is locked by another user it will appear in light red and if it has been finalized (a finalized document cannot be modified) it will appear light purple.
- If you have many documents, you can sort through them by number, status or description, simply by clicking on the column title. To sort from lowest to highest click once, from highest to lowest click twice.

Click on the menu button 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 the "Save modifications" button located at the bottom of the window. If you do not want your modifications to be saved, press on the "Cancel modifications" button.

If you don't press on any button, the document will remain in the "In edition" status and won't be available for other users.

From the Document window

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

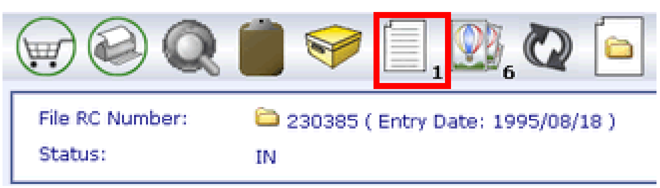
2. When your modifications have been made, save the document in the program before closing it. Click on the "Save modifications" button located at the bottom of the window. If you do not want your modifications to be saved, press on the "Cancel modifications" button.

If you don't press on any button, the document will remain in the "In edition" status and won't be available for other users.

3.10.7 Finalizing, emailing and deleting a document

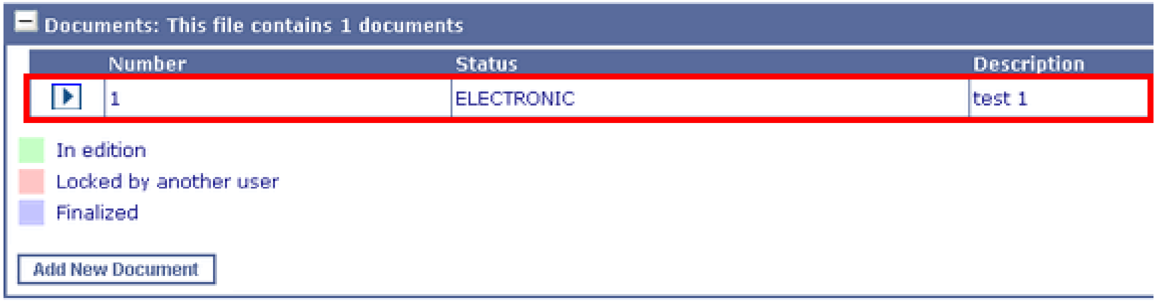
1. Search 24 for a file

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



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

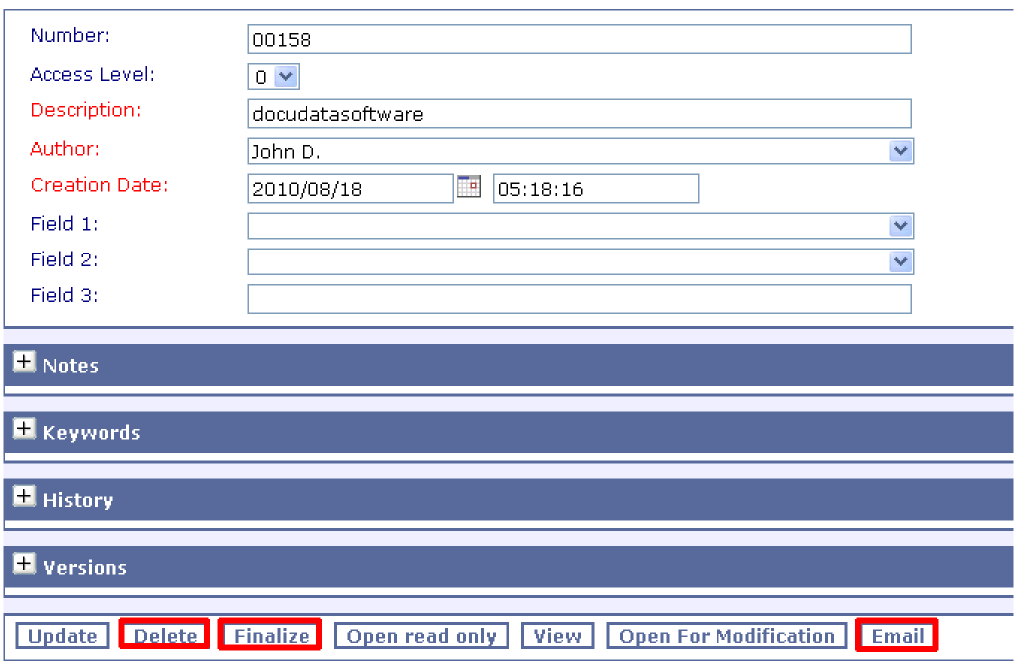
3. This will bring you down the page to the documents section:



Notes:

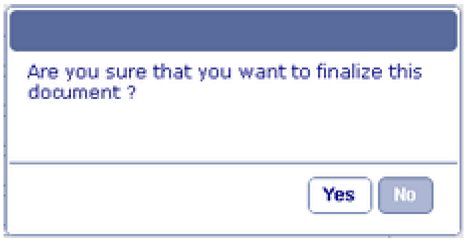
- When you are presently modifying a document, it will appear in light green. If it is being modified (locked) by another user it will appear in light red and if it has been finalized (a finalized document cannot be modified) it will appear light blue.
- If you have many documents, you can sort through them by number, status or description, simply by clicking on the column title. To sort from lowest to highest click once, from highest to lowest click twice.

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



To Finalize a document

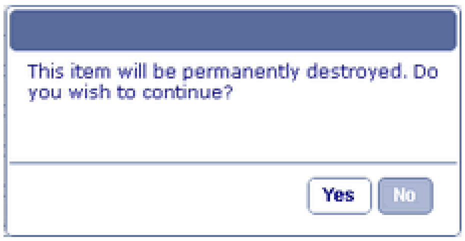
1. Click on the "Finalize" button. This will make the electronic document non-modifiable. A verification message appears.



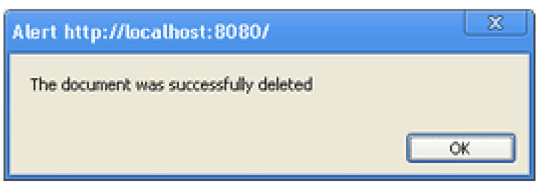
2. Press "Yes" to finalize the document. It will therefore only be available as "open read only" and will not be available for deletion.

To Delete a document

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



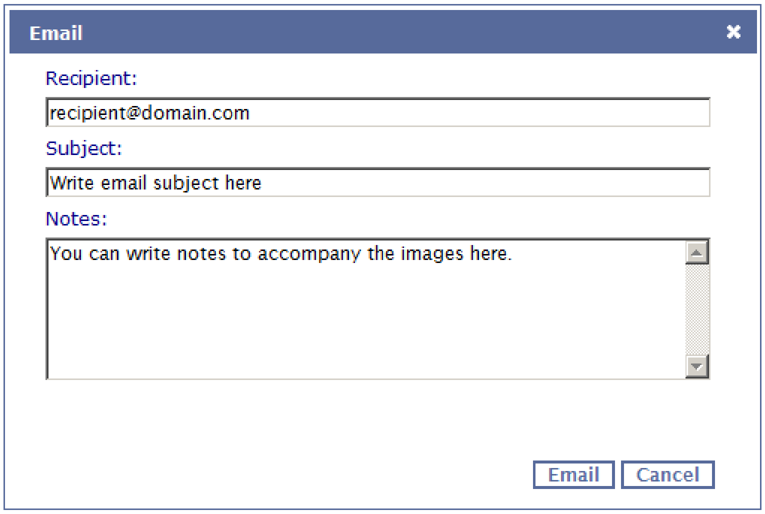
2. Press "Yes" to delete the document. A confirmation message appears.



Note : Finalized documents cannot be deleted.

To Email a document

1. Click on the "Email" button. A new window will pop-up on top where you can enter the recipient's 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 simply click on the "Email" button.

Note: If you need to send the email to more than one recipient, simply separate the email addresses with a comma like so:
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.

3.11 Imaging Options

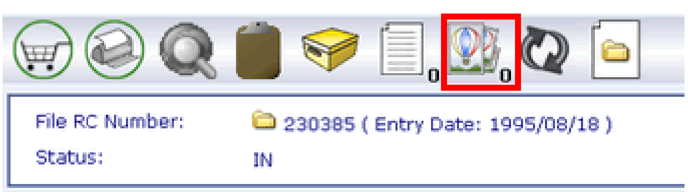
The following options are used to manage images within a file. One can view, create, edit, email, import, scan and index images.

This tab is only available when using the Imaging version of the web interface. For more information, please contact your record center.

3.11.1 Viewing Images in a File

1. Search 24 for a file

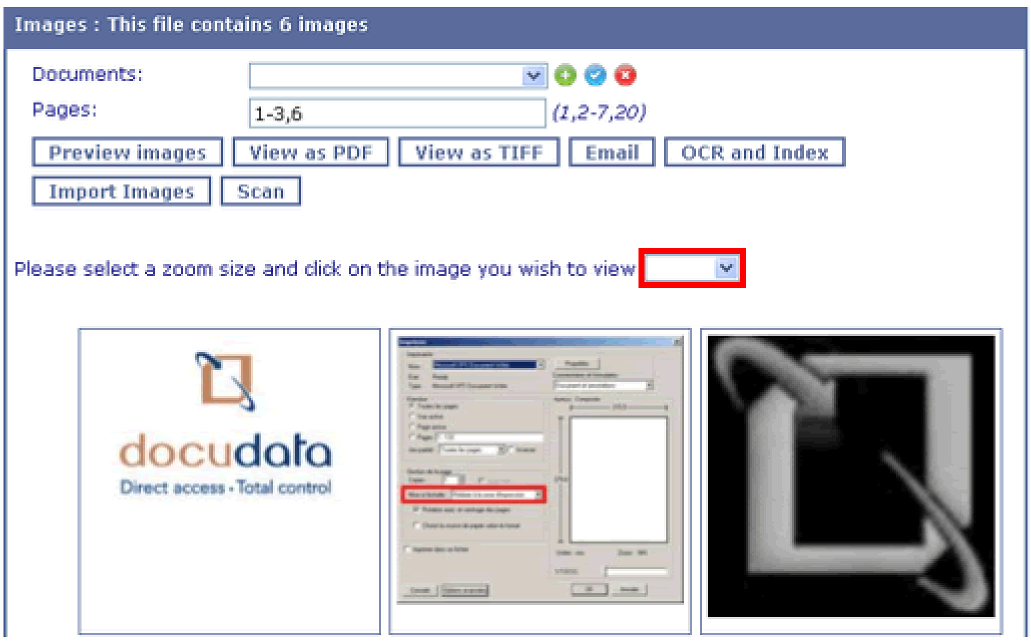
2. Click on the **Images** icon from the tool bar:



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

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 the **Preview images** button:



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 pressing on the Cancel button.

3.11.2 Creating a document index

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

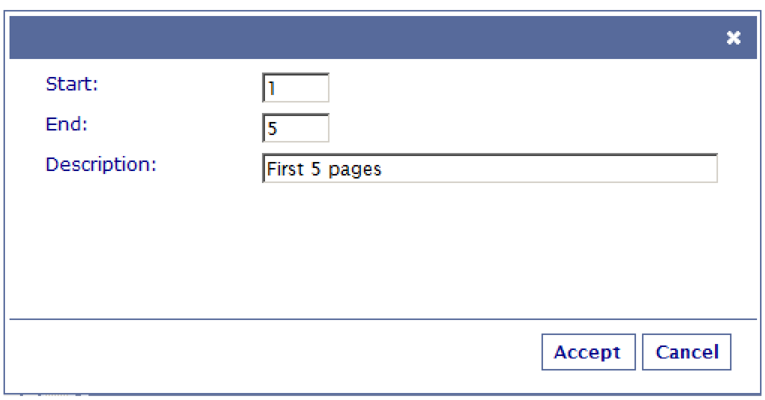
For example as in the picture above, let's say that my current file contains 6 images, or 6 "pages" of image. I can now "index" groups of pages together using the following buttons:

Used to ADD a document index.

Used to EDIT an existing document index.

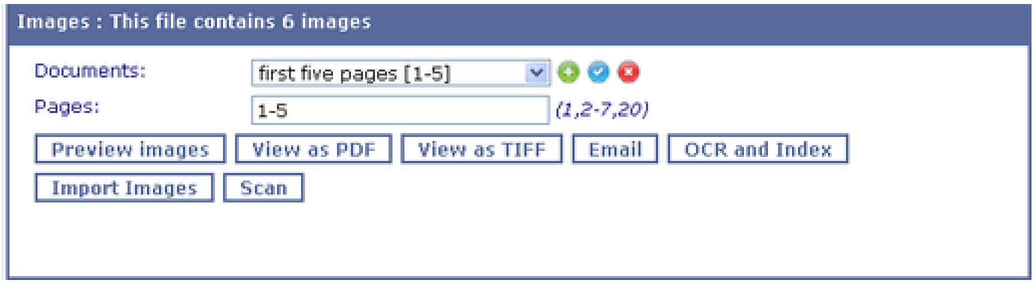
Used to DELETE an existing document index.

Let's index the first 5 pages as an example:
1. Click on the green button 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. They will be shown in brackets beside the description.

2. Once you click the "Accept" button, this new index will be automatically chosen in the "Documents" drop-down menu as shown below:



From here you can "edit" this same index if you wish by clicking the blue "edit" button or delete it with the red "delete" button. Once you are done with your index then you can create more until you are happy with the results.

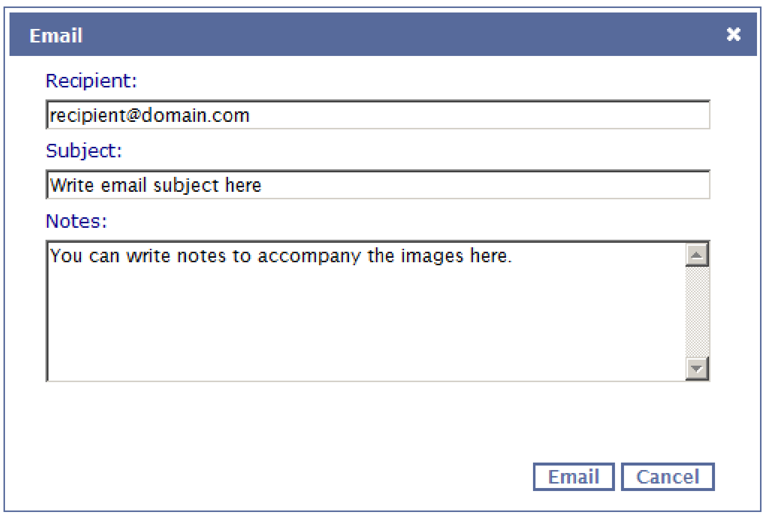
Note: You cannot have 2 indexes with the same "end" page. If you try to add a new index and choose the same "end" page as one that already exists you will simply not be able to press the Accept button. You have to change the end page in order for the software to accept the modification or the addition.

These indexes can be used also later on when doing a full text search 24 to quickly find images. **Note that this feature is not yet automated from the web directly. If you need to have image indexes available through the full text search facility, you need to tell your Record Center to index those documents for you.**

3.11.3 Emailing Images

Images can also be emailed to any valid email address. 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 the "Email" button as indicated in the picture below:

Then a new window will pop-up on top where you can enter the recipient's email addresses, the subject of email and any notes you wish to attach to the email:



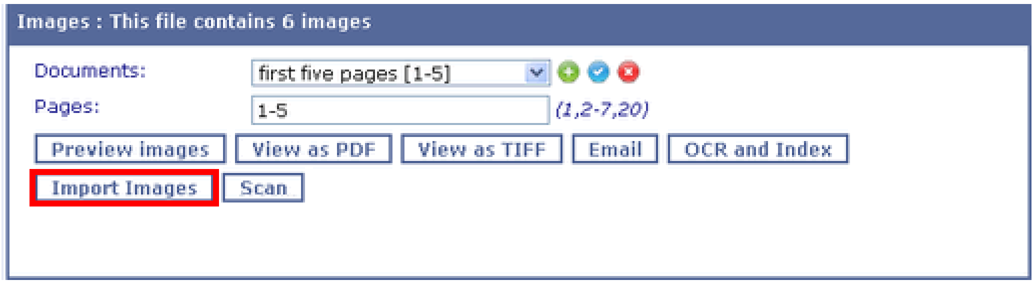
When you are ready to send the email you simply click on the "Email" button.

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

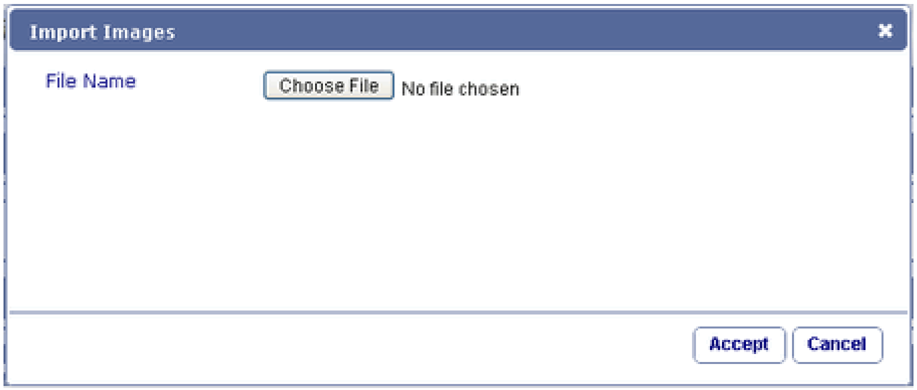
Note: The limit of recipients you can send the email to is not defined by ActiveWeb but by your internet service provider.

3.11.4 Importing Images Into Files

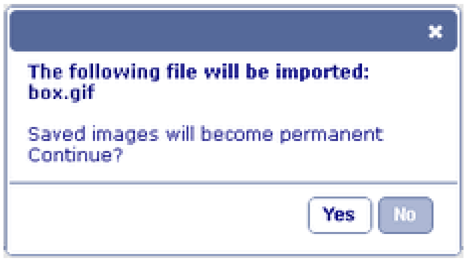
You can import images(one at a time) or pdf files by first clicking on the "Import Images" button like shown below:



The "Import Images" dialog will then open so you can choose an image from your computer. Just click on the "Choose File" button 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 the "Accept" button.



After clicking on "Accept", you will also get a confirmation dialog like so:



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.

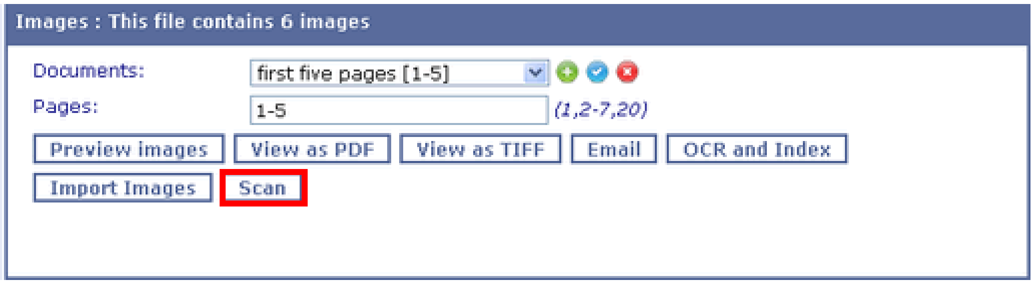
After clicking "Yes" on this dialog, the image will be appended to the end of the image list. So for example if you had 35 images in before importing a new one, the newly imported image will be located at # 36.

3.11.5 Scanning Images Into Files

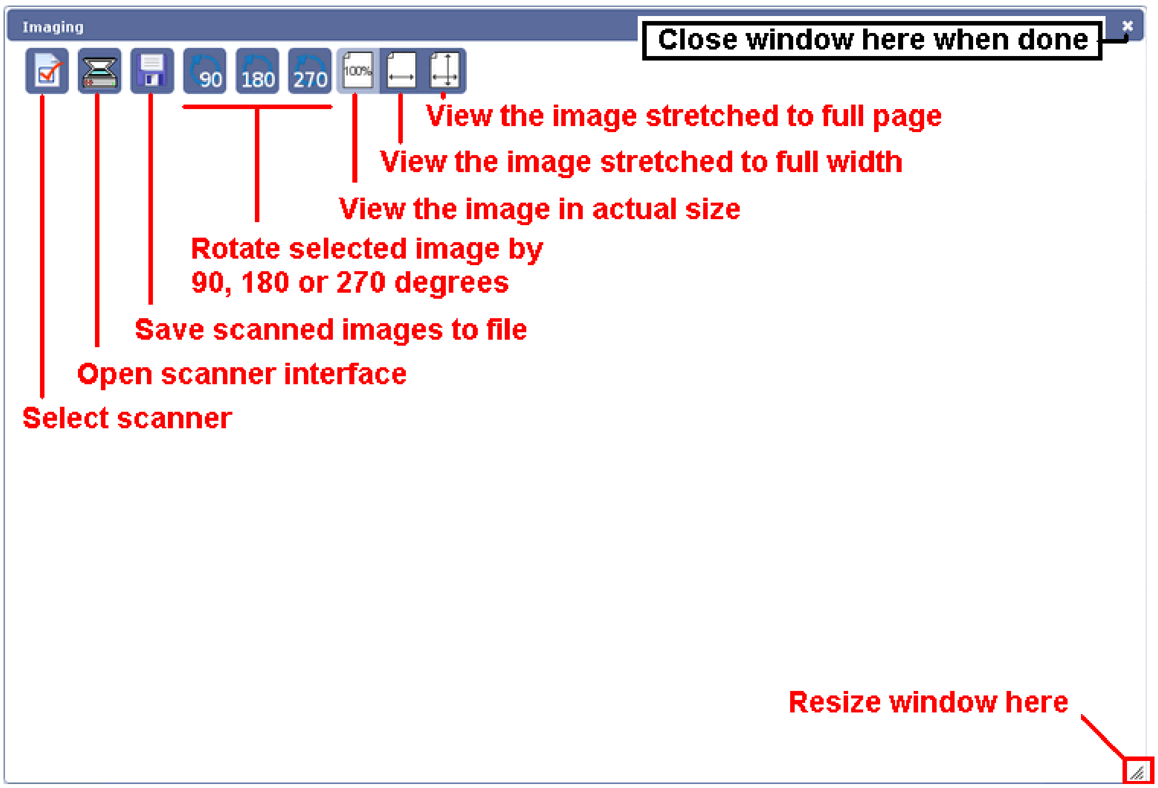
If you have a TWAIN-compatible scanner setup on your computer, you can scan images directly into files via ActiveWeb.

Note: You 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"** although at the time of writing this manual, they were already at version "JRE 6 Update 13". Go to "http://java.sun.com" to download the package or click here to access the download page directly.

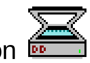
To start you first have to click on the "Scan" button as seen in the picture below:

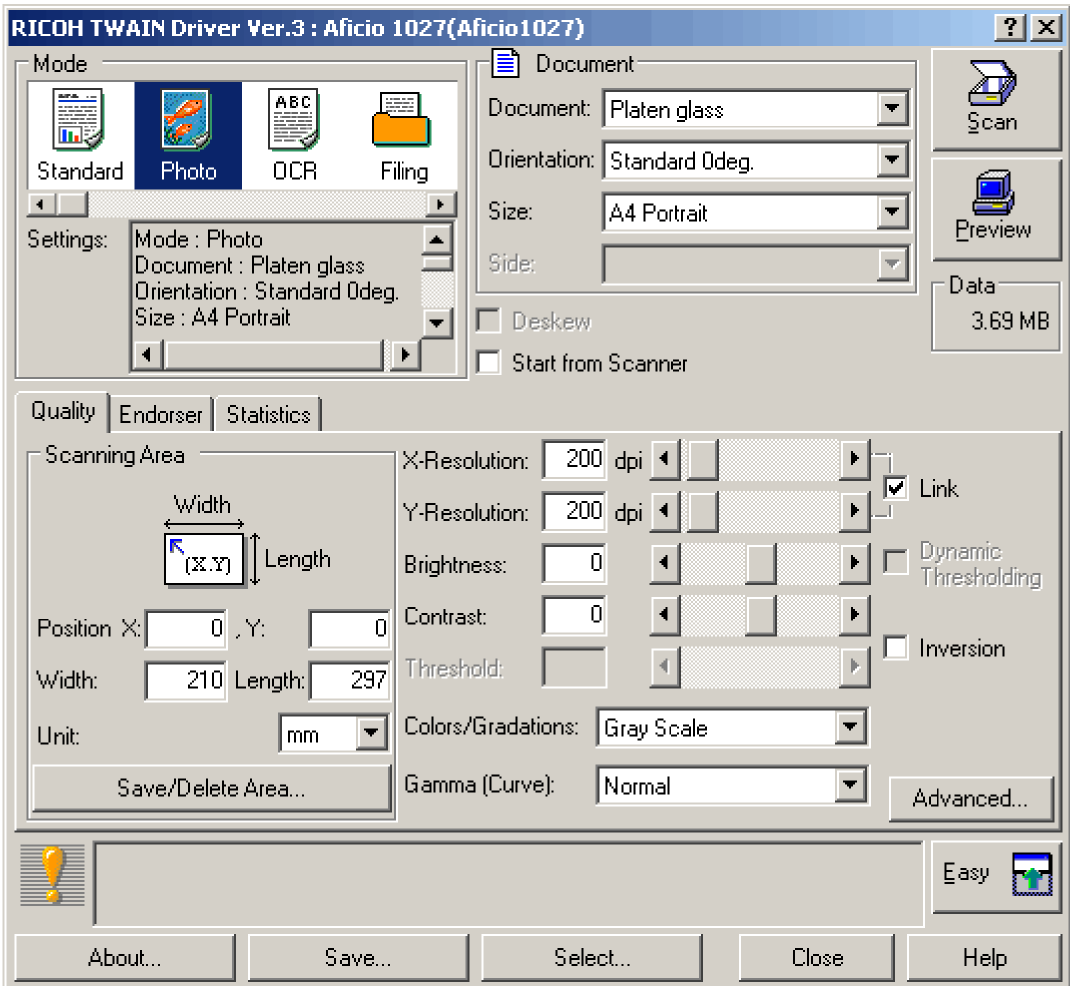


Then the scan window appears like so:



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 this button  to choose your scanner. If you don't see your scanner in this list please ask your computer administrator to make sure it is properly installed. **Note that if your scanner does not have a compatible TWAIN driver installed, the scanning won't work.**

Once your scanner is chosen open your scanner's interface by clicking on this button . Here's what I got when opening mine:

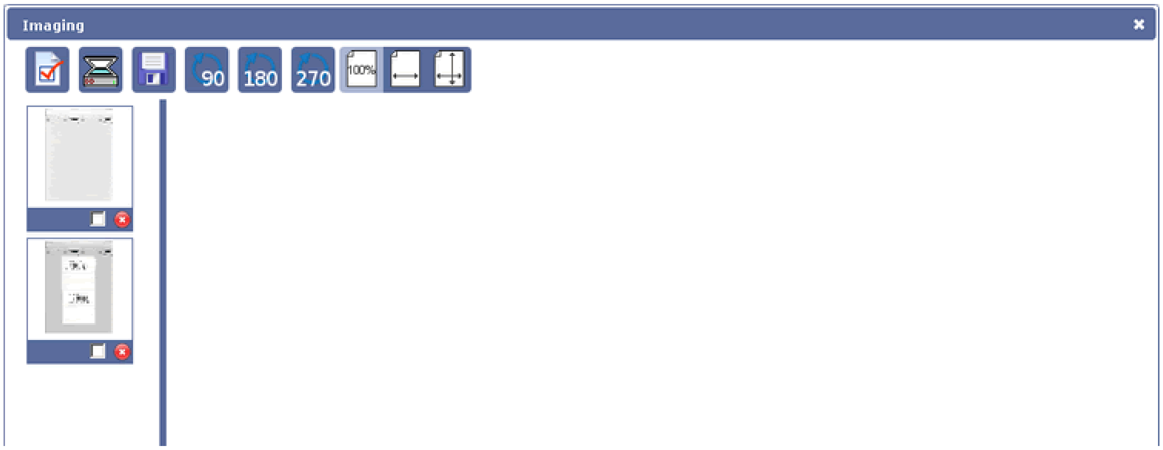


Note that every scanner will have its own variant and might not look at all like the one you see here.

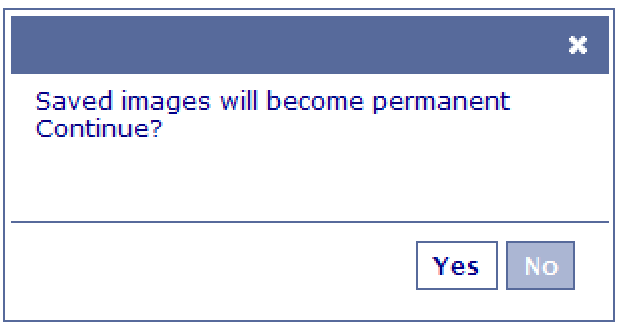
Note also that the scanner's interface might appear to not show up at all. It might just be that it is hidden behind another window so if you don't see your scanner's interface the first thing you should do is move or resize the other windows on your screen to make sure it is not hidden.

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 should return to the scanning window of ActiveWeb where you will see your scanned images like so:



At this point you can select (see the checkboxes in the picture above) any image from the list of shown images and rotate them if you need to with 90, 180 and/or 270 rotation buttons and/or simply save them to the file. When you click on the save  button you will be asked for a confirmation like so before continuing:



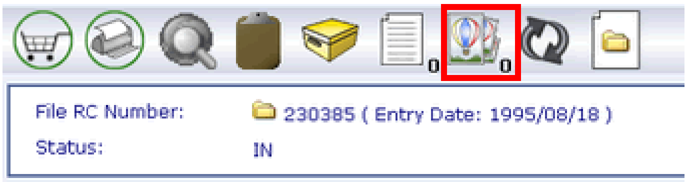
Note: This dialog is an important part of the import process because once an image is imported it cannot be deleted unless the whole file is destroyed on a disposal list.

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.

3.11.6 Performing OCR and indexing

1. Search 24 for a file

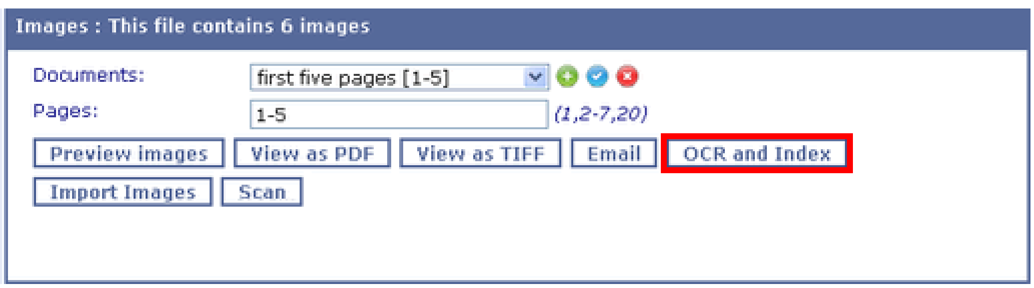
2. Click on the **Images** icon from the tool bar:



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

3. This will bring you down the page to the images section. Either scan 55 or import 54 a new image. For existing images simply skip to the next step.

4. Enter an interval of existing images (using hyphens) 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.) Press on the OCR and index button.

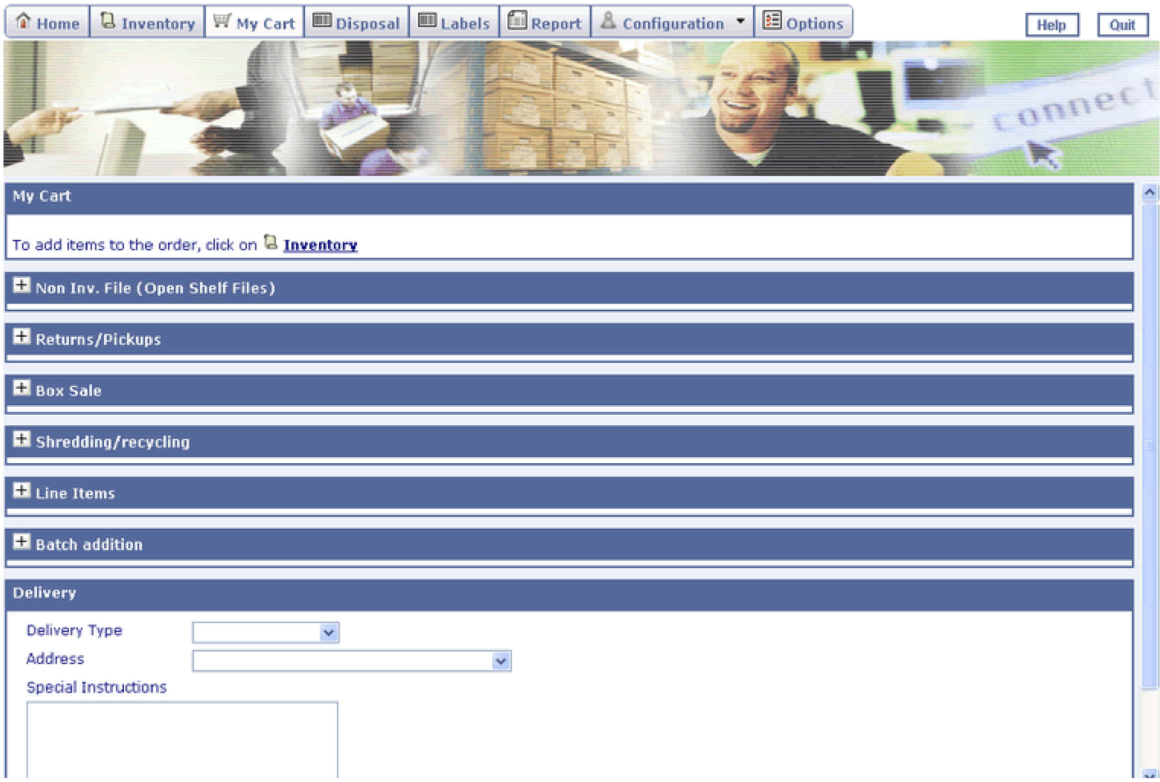


The information will therefore be available when searching via the full text search 24.

4 My Cart tab

4.1 My Cart Tab Layout

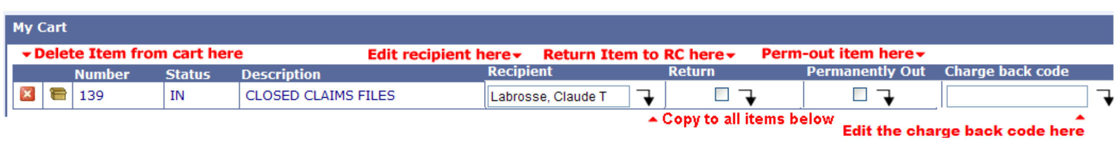
When you first open the "My Cart" tab, you are presented a screen like so (if you have not added anything to your cart yet):



Here's the description of the different areas in this page:

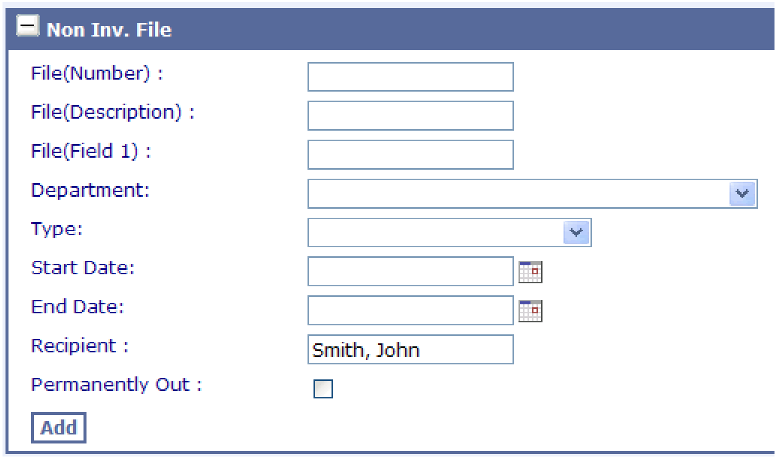
My Cart

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 picture to illustrate:



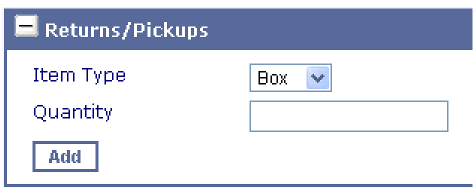
Non Inv. File (Open-Shelf files only)

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. 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 simply be removed from inventory.



Return, pick ups

You use this section if you want the record center to come and pick up a number of items for 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

If you need more empty cardboard boxes to put your files in this is where you order them from. Simply enter the quantity, which department they belong to and change the recipient if need be.

Recycling bin rotation

This section can only be seen when your Record Center offers shredding or recycling services to your company. 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 your are billed) and edit the recipient (if needed). Press on the Add button when all the information has been entered.

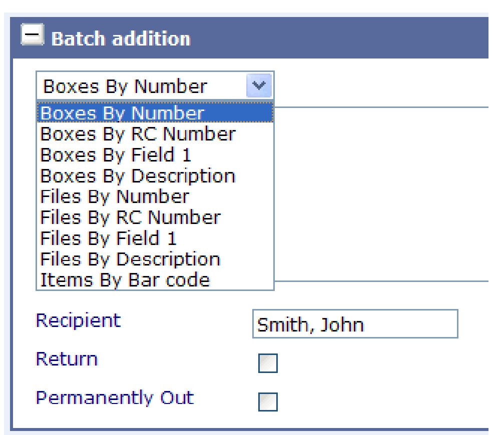
Line Items

The line items section is where the record center offers different items and/or services than just box and file retrievals. Most likely these items/services will be listed in here. Select the item, enter a quantity, select a department and change the recipient if need be.

Batch Addition

The batch addition section is where you can add many boxes and/or files on the order at once. So whatever criteria you choose to use make a batch addition, all you have to do is make sure there is put one criteria per line. In the case of numbers for example, you would just enter one number per line as in:

1
2
3
etc...



Delivery

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

4.2 Placing an Order to Your Record Center

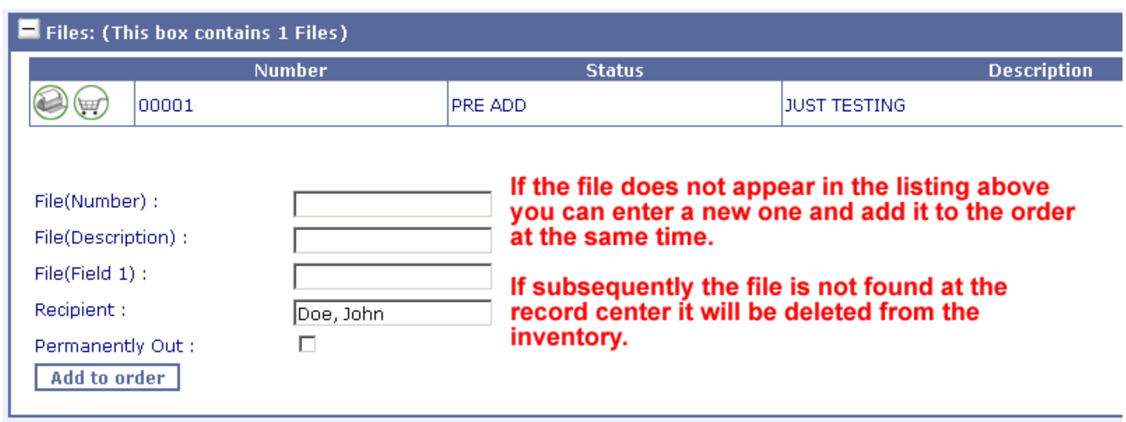
Placing an order to your record center is quite easy but depending on what you want to order or return there is a few different ways to accomplish this task.

Scenario 1: Order from searches

One common way to place items on an order is to first "search" 24 for the item you need and then place it on the order. To place it to the order simply 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 so:

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



Here as 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 in the list then you simply 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.

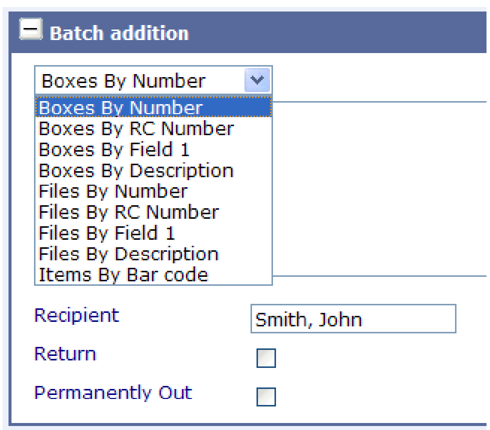
You repeat the same steps to keep adding items to your "cart". Once you are done adding items you can browse to the "My Cart" tab where you will find one line on your cart for each item that you placed. The line will look similar to this:

From here you can fine tune some of the parameters like the recipient, wether 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 simply press the red "X" on the left side of the item.

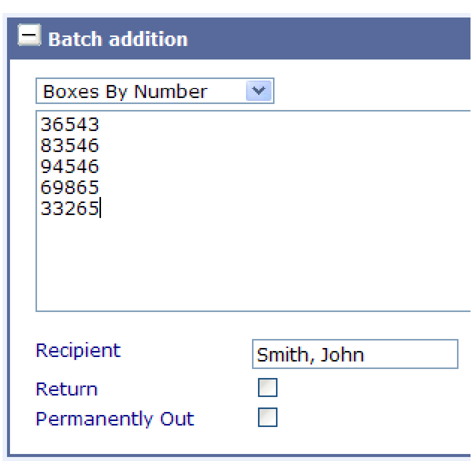
Once you are satisfied with the items on your order you can specify your delivery options and submit your order 67 to your record center.

Scenario 2: Order via a batch addition

Another quick way to place an order could be in the case where you already know either the Number, RC Number, Barcode, Description or any other field indicated in the drop-down menu like in the picture below.



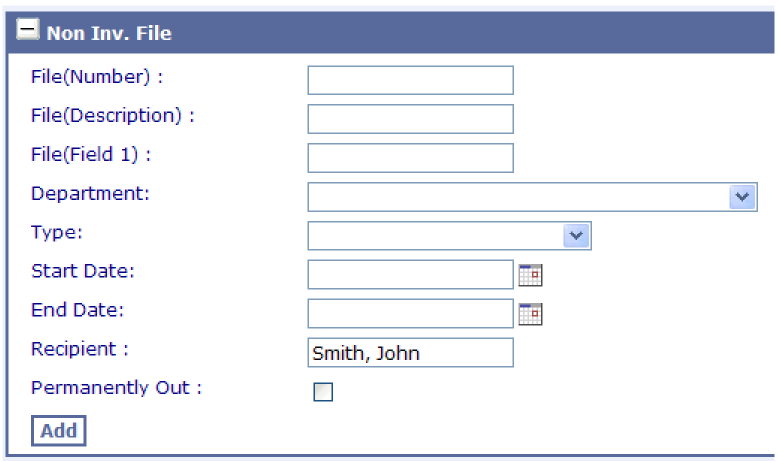
Then all you have to do is list the numbers (or any other fields info) on a line of its own in the area under the drop-down. Here also you can choose the standard options: recipient, return & Permanently out if you wish.



Once you are satisfied with the items on your order you can specify your delivery options and submit your order 67 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 simply be removed from inventory.



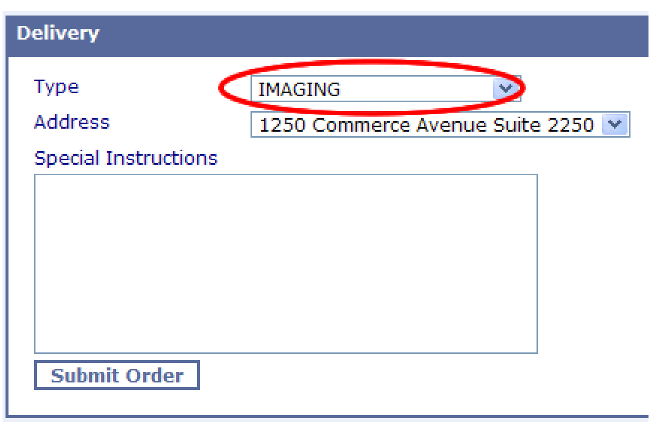
Once you are satisfied with the items on your order you can specify your delivery options and submit your order 67 to your record center.

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 24 for the files to be imaged or add them directly to your order if know what they are.

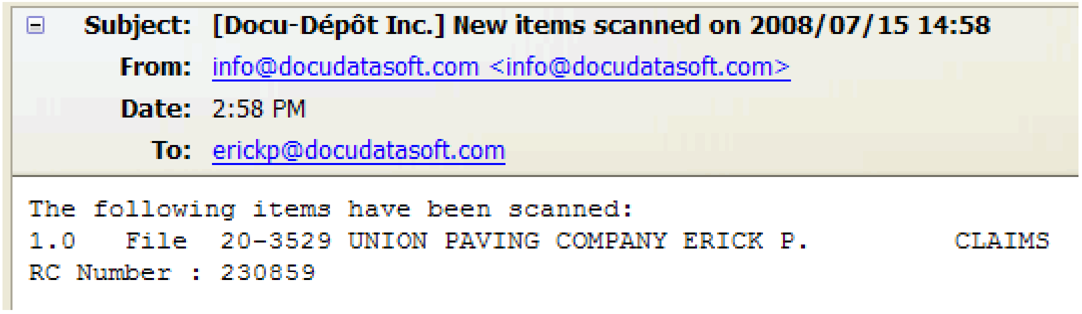
2. On the "MyCart" page, in the delivery section, make sure you choose a delivery type that relates to "imaging" as in the picture below:



Note: Your particular imaging delivery types might be called something different than what is mentioned here. You might not have access to any at all as well. If in doubt ask your record center.

3. When you're 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 in ActiveWeb and will tell you with which RC number to find it.



Subject: [Docu-Dépôt Inc.] New items scanned on 2008/07/15 14:58
From: info@docudatasoft.com <info@docudatasoft.com>
Date: 2:58 PM
To: erickp@docudatasoft.com

```
The following items have been scanned:
1.0   File  20-3529 UNION PAVING COMPANY ERICK P.        CLAIMS
RC Number : 230859
```

5. You can go then into ActiveWeb and look 49 at the image(s).

Scenario 5: Ordering other items & services

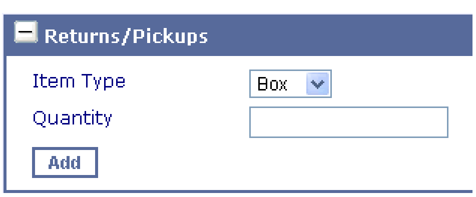
Sometimes your record center will offer special services or other items other than your regular boxes and files. These can be ordered from this section. The "Line Items" drop-down menu lists all the available items and services available to you.

To add an item/service you simply choose it from the drop-down menu, select a quantity and department and press the "Add Line Items" button like in the picture below:

Once you are satisfied with the items on your order you can specify your delivery options and submit your order 67 to your record center.

Scenario 6: Returning items to the record center

You use this section if you want the record center to come and pick up a number of items for 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. 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.

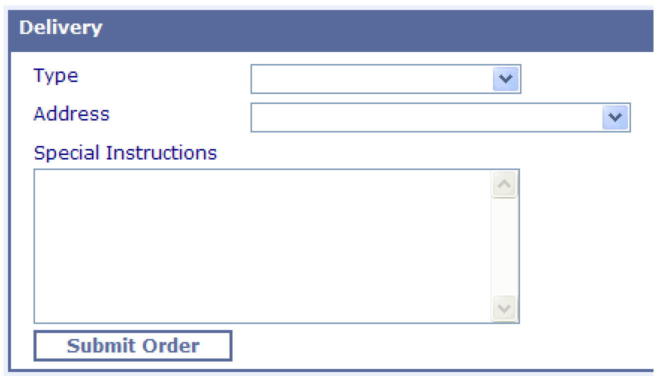


Simply select the item type you want to send to the record center, enter the quantity and press on the "Add" button.

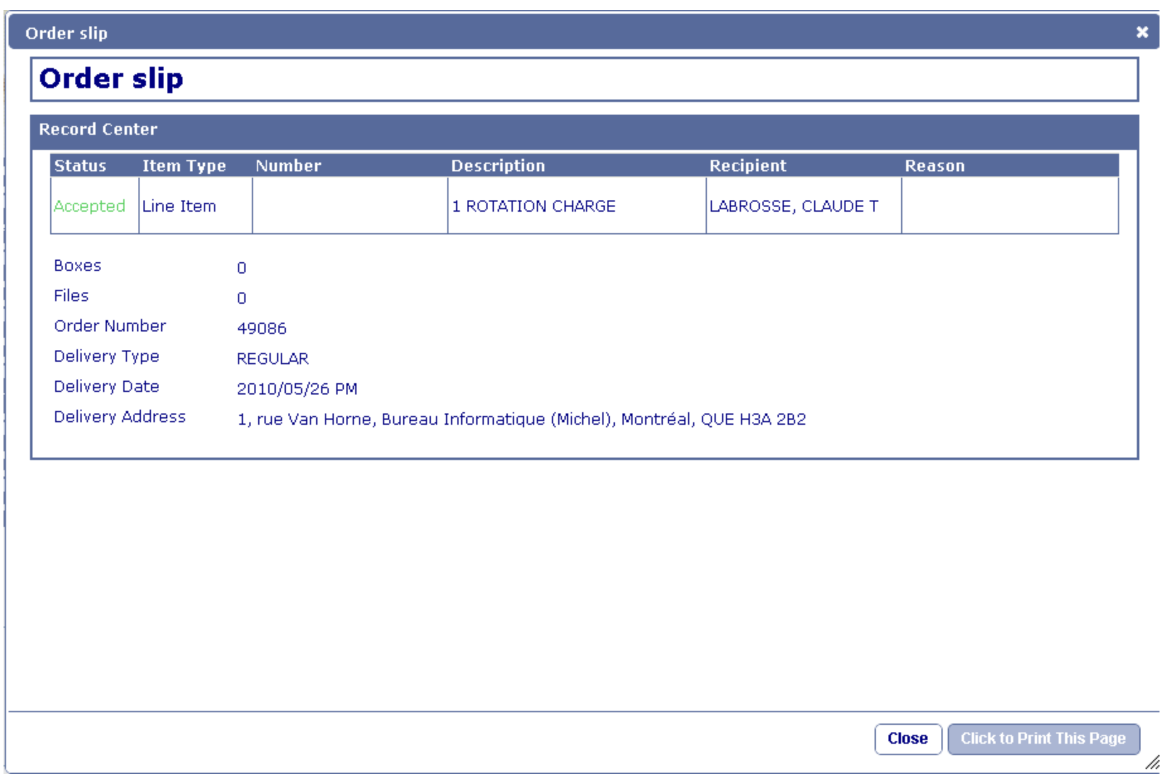
Once you are satisfied with the items on your order you can specify your delivery options and submit your order 67 to your record center.

Specifying delivery parameters and submitting your order

Before you can submit your order to the record center you have to specify the "delivery type" and select at which address you want your order shipped. If you need to enter any special instructions to the record center to accompany your order you can do so 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 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).

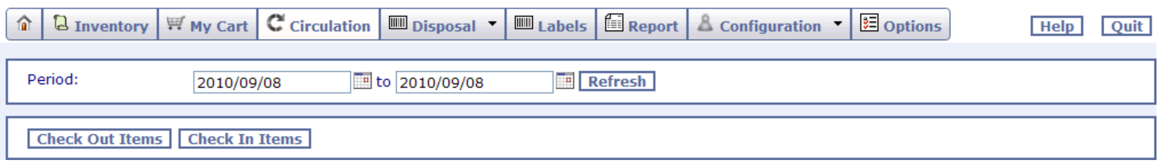
Note: Any item can be put on the cart, even In-House items, though these items will be sent on an in-house picking list so the picking clerks at your office will be able to process the order and send them your way. The order confirmation report will show you which items will be coming from in-house locations. For more information please consult the Picking lists and Refile lists 72 topic.

If you have scenarios of your own that this manual doesn't describe, 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 picking or refile list has been created):



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

Period
These calendars let you enter a date range for viewing refile and picking lists.

Refile lists
A refile list is created automatically when items are checked IN.

Picking lists
A picking list is created automatically when IN-HOUSE items are ordered in MyCart.

Check Out items
This button will let you check OUT items (i.e telling the system a recipient is taking out the box/file from its location, or file room, to consult it's content) 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 box/file back to its location or file room) using a wedge scanner or by entering the RC numbers of items.

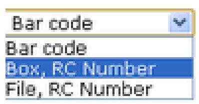
5.2 Check Out items

Checking Out is when an item is “IN” your on-site file room (IN-HOUSE) and you want to take it “OUT”. This process simply 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 103.

3. Select the way the information will be entered (Barcode, Box RC Number, File RC Number). Take note that if you have a wedge scanner attached to the workstation, it will be faster if you select Barcode.



4. *When using barcodes :* Scan the box or the file's barcode.
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.

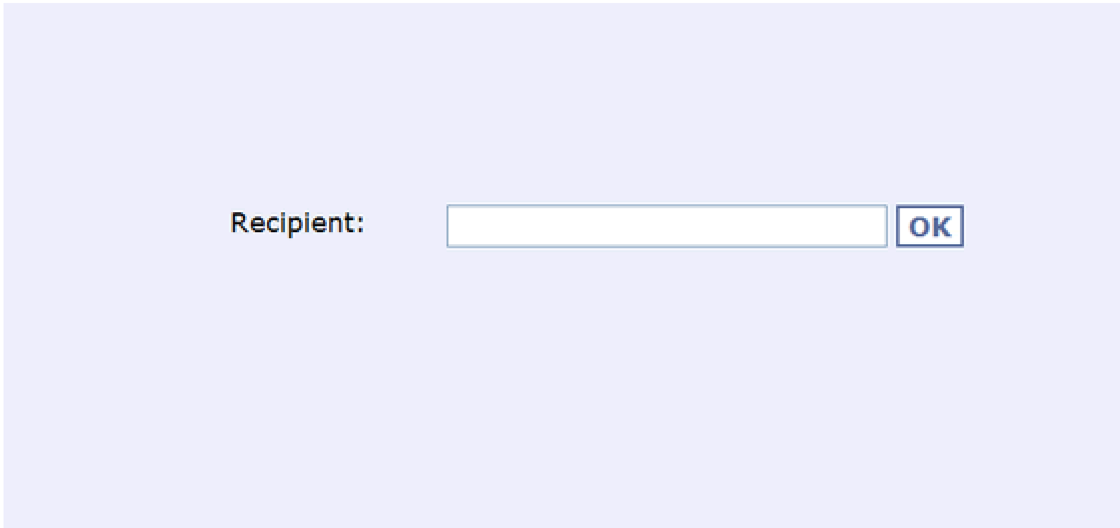
5. At the bottom of the window, a summary of 'items checked out' will be updated every time an item is checked out.When all items have been checked out, press *Close*.

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.

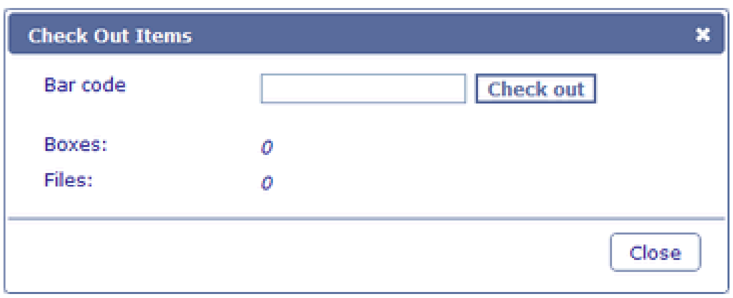
1. Access the terminal mode by entering the correct address : http://<ActiveWeb address>/terminal
Note: The customer must have a web licence with the 'active' option (that enables them to manage in-house documents).

2. Login 6 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 barcode manually and press Check out (the barcode is usually at the bottom of a label and resembles this : 1J 111 250000).

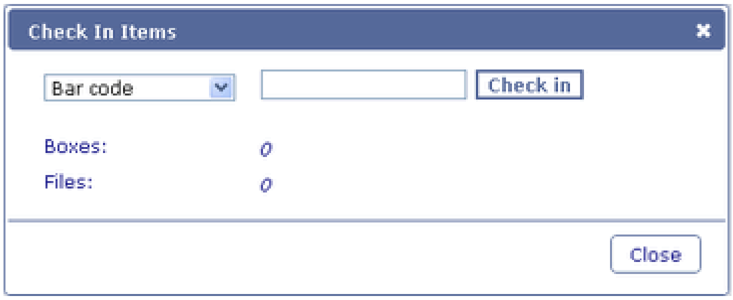
If the barcode hasn't been entered properly the following error message should appear :

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*.

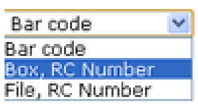
5.4 Check In items

Checking In is when an item is in your possession "OUT" (IN-HOUSE) and you want to make the document available again to other users.This process simply indicates that the item goes from your office to the office file room.

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



2. Select the way the information will be entered (Barcode, Box RC Number, File RC Number). Take note that if you have a wedge scanner attached to the workstation, it will be faster if you select Barcode.



3. *When using barcodes :* Scan the box or the file's barcode.
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, press 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 checked in, press *Close*.

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

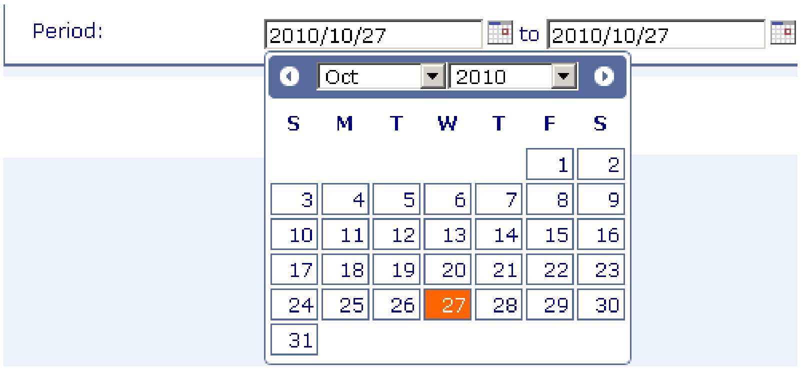
5.5 Picking lists and Refile lists

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 simply checks OUT the items for the recipient 103 or the recipient checks it OUT himself. For more information about this procedure, consult the Check OUT items 69 topic.

To view a picking list and mark items as picked

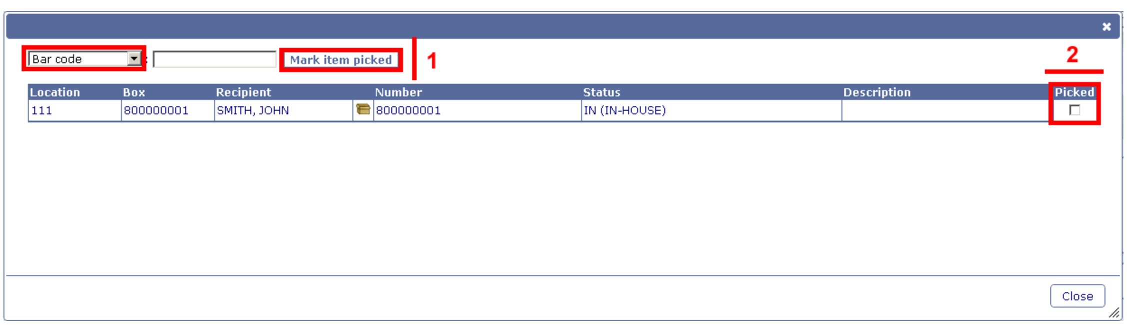
1. Enter a date range in the period fields (from/to) by using the calendar icons to select dates.



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 maximal 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 : Barcode, Box RC number or File RC number. Then, scan the barcode 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' checkbox beside the item. This is normally used when you have very few items on your list.

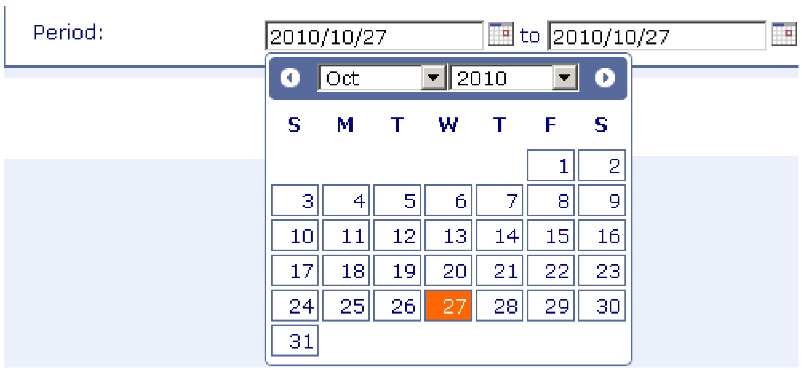
When all items have been picked, press *Close*.

REFILE LIST

A refile list is created when a recipient 103 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 72 topic.

To view a refile list and mark items as refiled

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 maximal 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 back in its location :

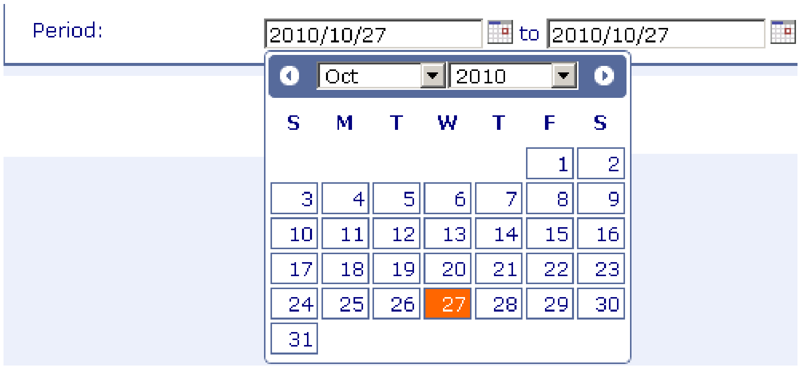
1) First, select one of the following options : Barcode, Box RC number or File RC number. Then, scan the barcode with a wedge scanner or enter the RC number and finally press on the 'Mark item refiled' button. This is very useful when the list of items is extensive.

2) Check of the 'Refiled' checkbox beside the item. This is normally used when you have very few items on your list.

When all items have been refiled, press *Close*.

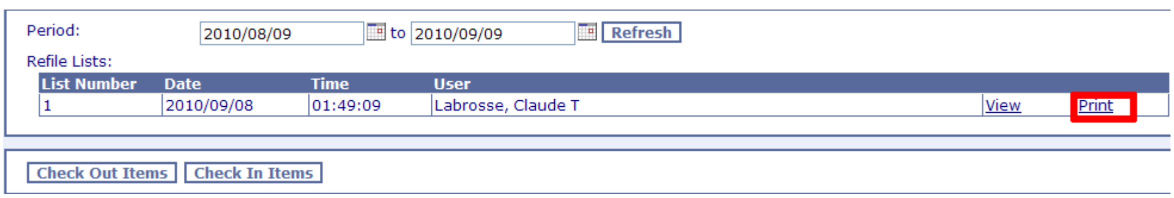
To print any list

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 maximal date permitted.

2. Press on the **Print** option at the extreme right of the list you want to view.



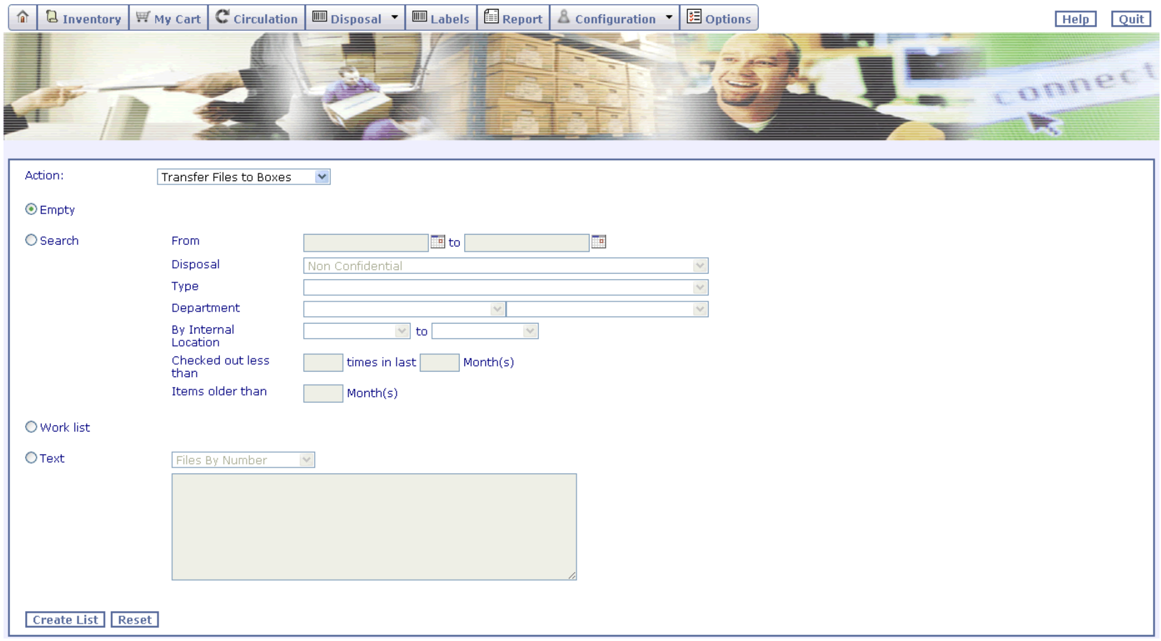
3. The report will be opened in a new window in PDF format.

6 Disposal Tab

6.1 In-House Disposal Tab

You can now 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.

Here's what you first see when you enter the "In-House Disposal" tab in ActiveWeb:


Inventory
My Cart
Circulation
Disposal
Labels
Report
Configuration
Options
Help
Quit
Action:
Transfer Files to Boxes
Empty
Search
From
to
Disposal
Non Confidential
Type
Department
By Internal Location
to
Checked out less than
times in last
Month(s)
Items older than
Month(s)
Work list
Text
Files By Number
Create List
Reset

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.

6.1.1 Creating a New In-House Disposal List

Creating a list

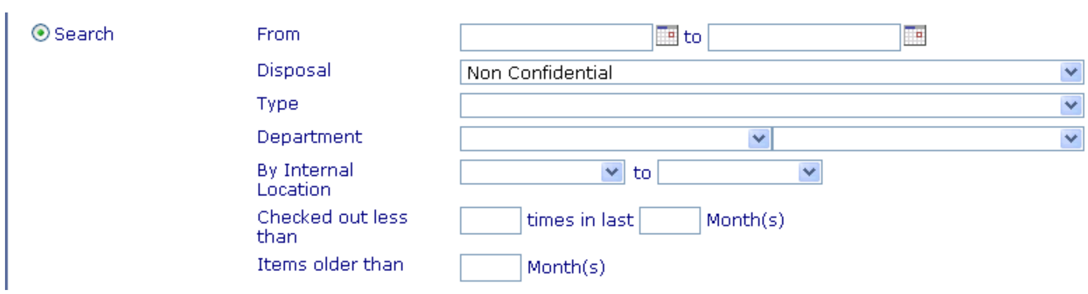
1. Choose the action you want to perform, from the following choices :

- *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.

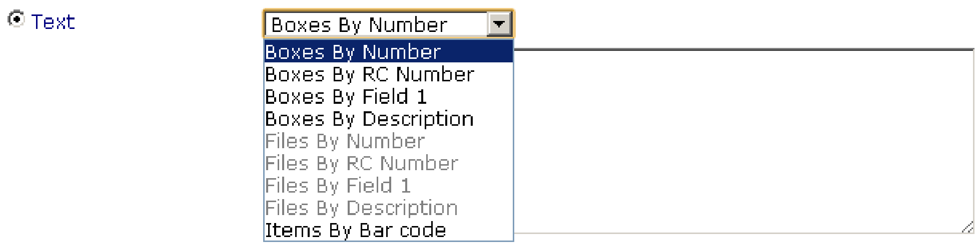
Department / Sub-department: Search by Department and Sub-department by selecting them in the list.
*Internal location : S*earch by internal location interval. Enter a range of locations (from/to)
Check out less than __ times in last __ Month(s): Search by number of times checked out for a specific period 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 35. 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 seen in the picture below:



As you can see you can 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 Barcode). Select a field that is written in black (the fields in grey are not available). The fields available vary from one action to the other (e.g when destroying boxes only fields pertaining to boxes will appear). You can only populate your list with one type of field at a time (e.g. you cannot enter some data as "Boxes by Number" and others as "Items by Barcode").

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

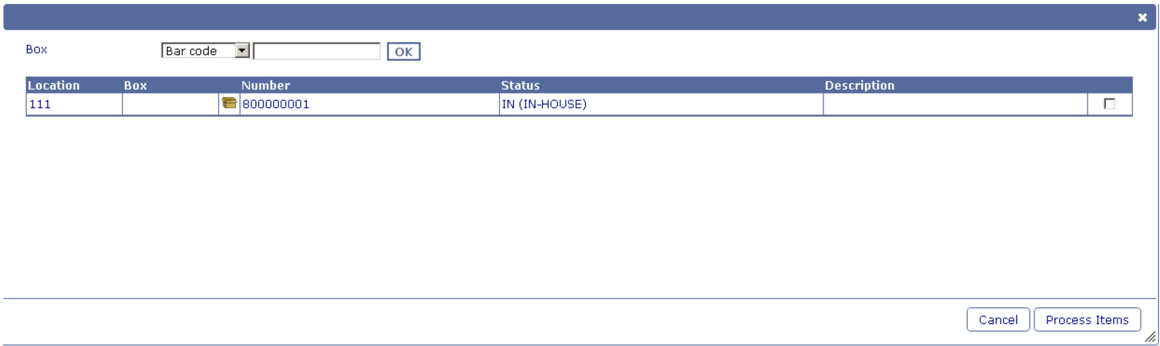
148
149

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 barcode with a wedge scanner;
- select 'RC number' in the drop down list, enter a value in the field and press OK, or
- check the box (situated at the extreme right) for each item on the list (this is used for smaller lists).

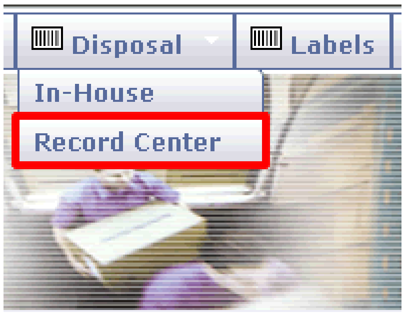
Once all items have been validated, press on the **Process items** button at the bottom of the window.
To cancel the processing of this list, press **Cancel**.

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

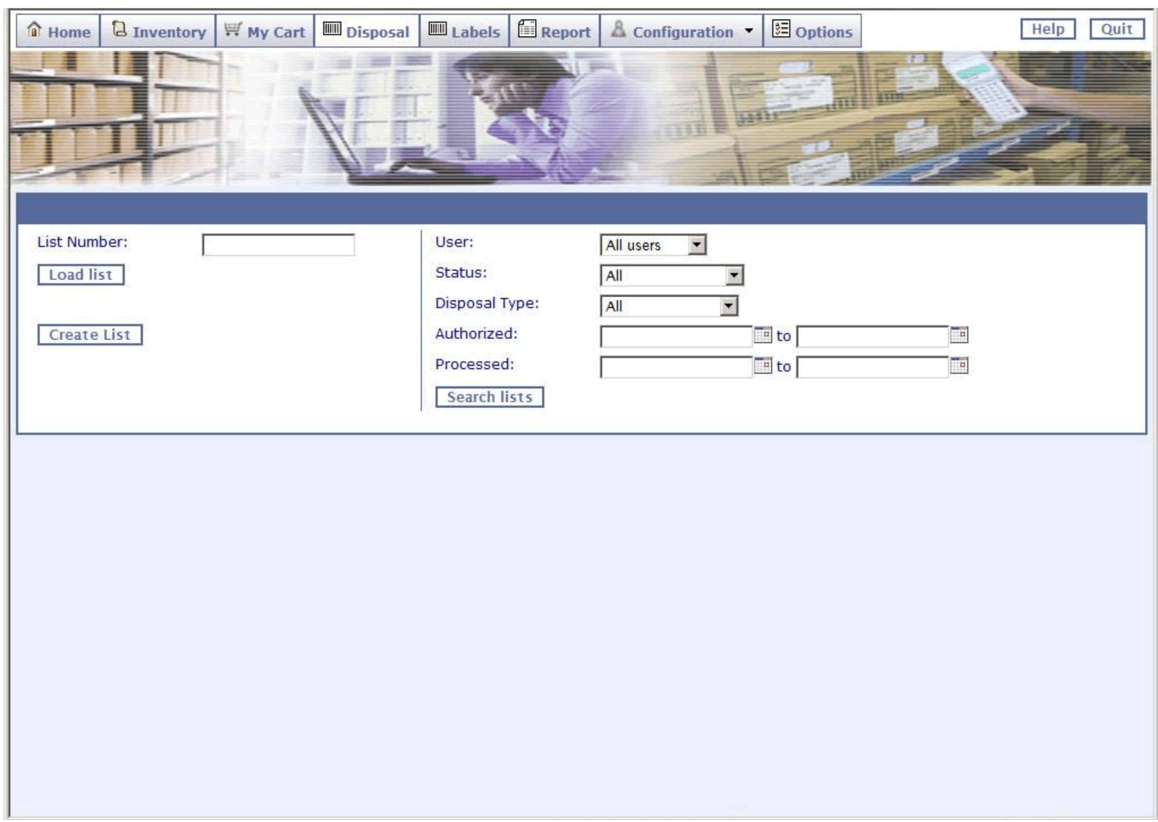
Press **Close** to return to the In-House Disposal tab.

6.2 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:

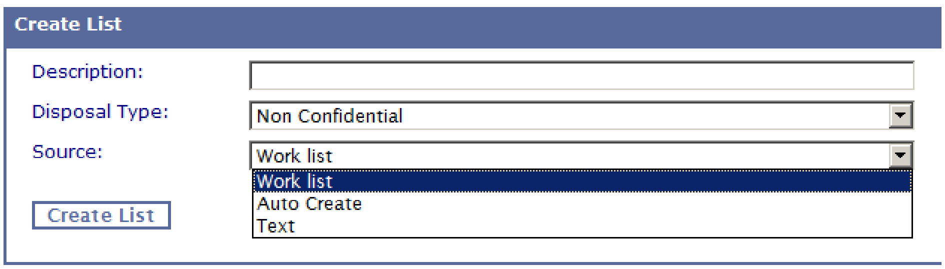


Here you can load or search existing lists and create new lists from scratch. The following pages will show you how to effectively use the Record Center disposal module in ActiveWeb.

6.2.1 Creating a New Disposal List for RC

1. To create a new disposal list you first have to click on the "Create List" button as seen below:

The window expands to show you the list creation form:



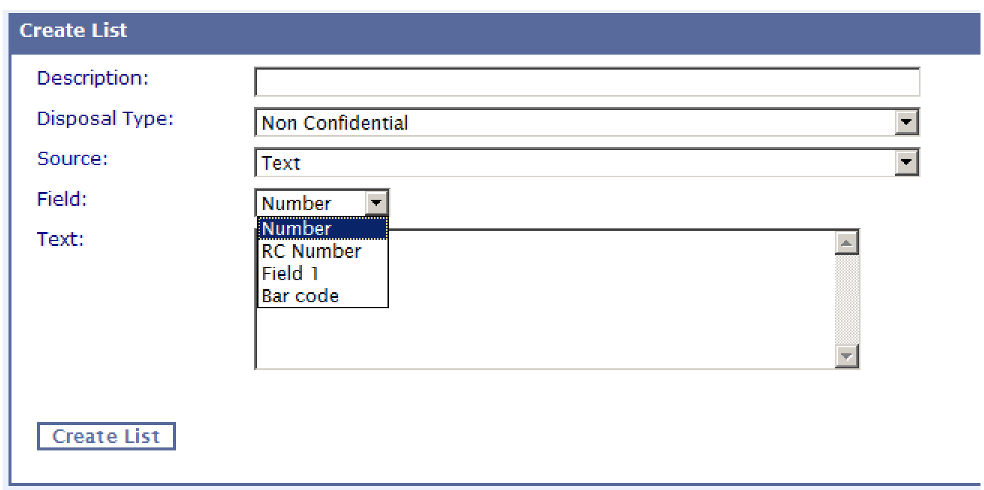
2. Select the way you will create the list from the following :

⊟ **From a work list**

In order to create a work list please consult the following topic : Using the Work List 35. 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 seen in the picture below:



As you can see you can 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

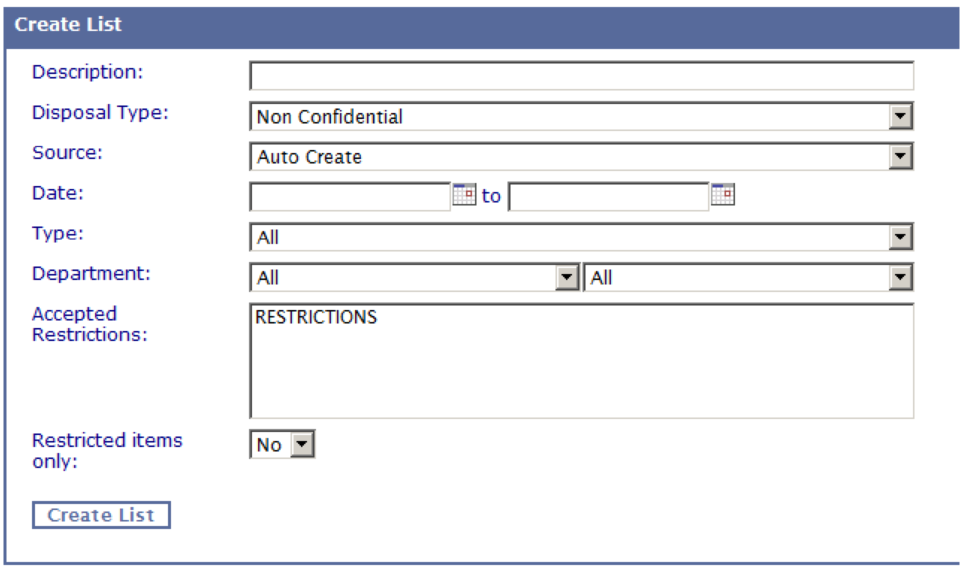
as opposed to having them on the same line (separated by commas):

148,149

Having them on the same line WILL NOT work.

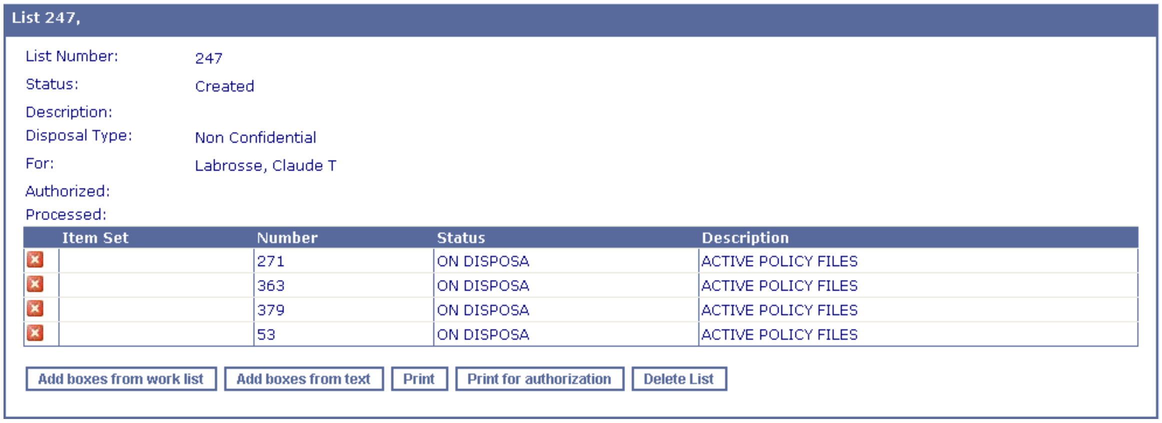
With the Auto Create function

If you choose the "Auto Create" method, you will get a screen like this:



Here you simply enter the date range for which boxes are due to be destroyed and then fill in the rest of the field 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 :


List 247,

List Number: 247
Status: Created
Description:
Disposal Type: Non Confidential
For: Labrosse, Claude T
Authorized:
Processed:

	Item Set	Number	Status	Description
x		271	ON DISPOSA	ACTIVE POLICY FILES
x		363	ON DISPOSA	ACTIVE POLICY FILES
x		379	ON DISPOSA	ACTIVE POLICY FILES
x		53	ON DISPOSA	ACTIVE POLICY FILES

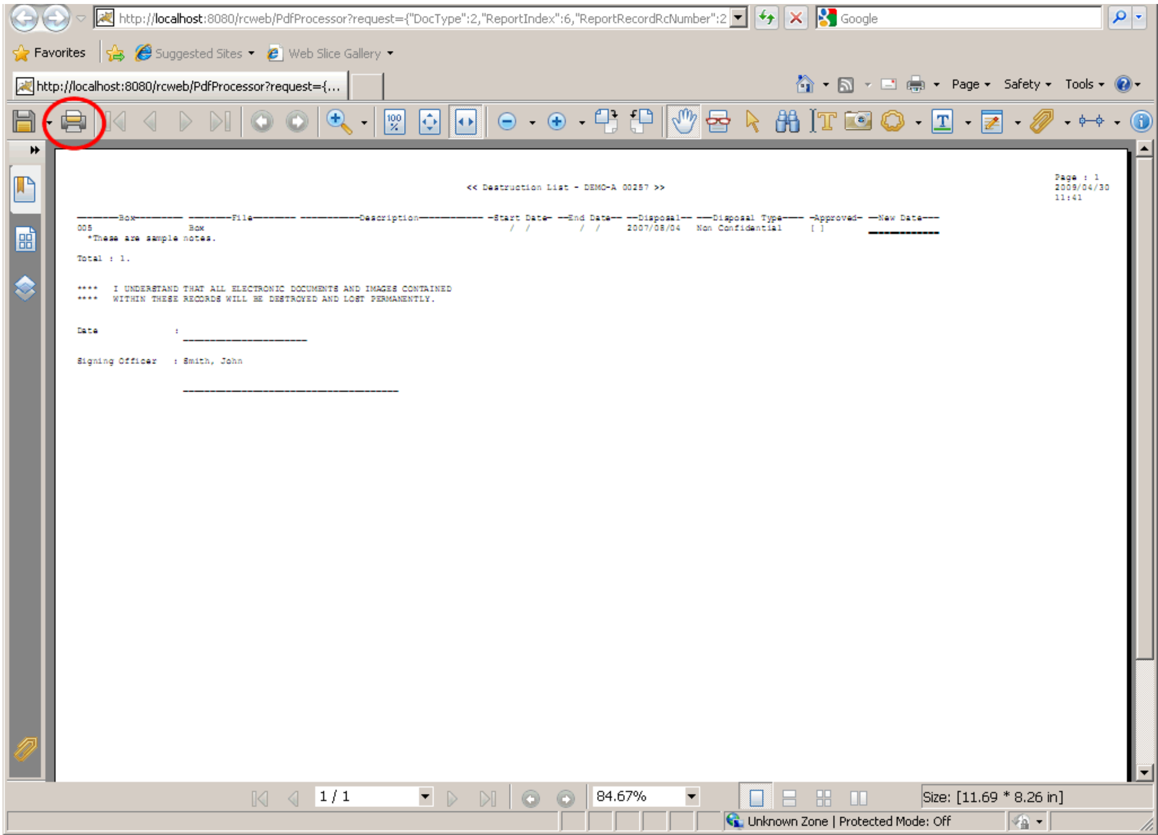
Add boxes from work list | Add boxes from text | Print | Print for authorization | Delete List

3. From here you can add or delete boxes to the list until your satisfied with it. The next step will then be for you 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 to 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.

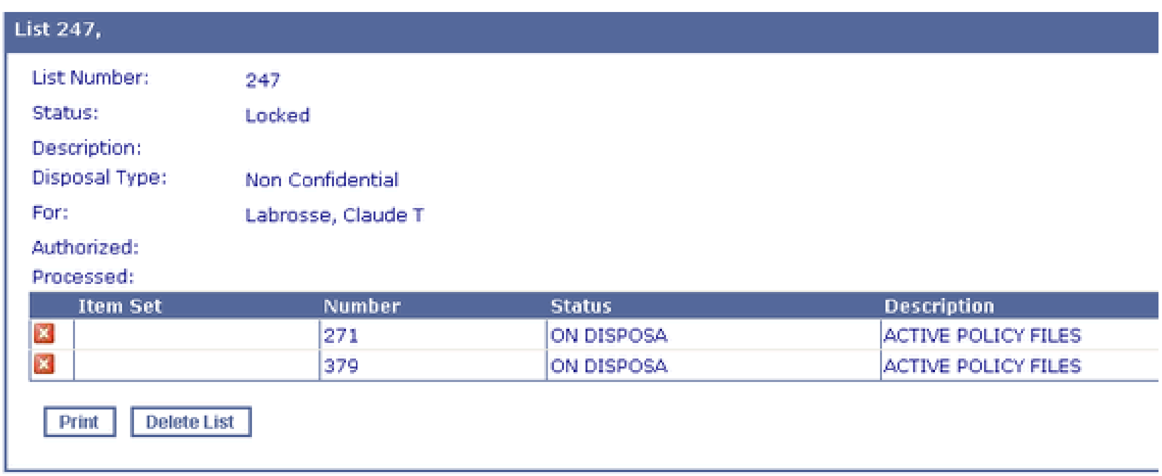
If you want to keep a record of the list before you do any modifications to it, you can choose to print it, by pressing on the "Print" button. Make sure to remove any problematic box from the list, otherwise you will not be able to print it for authorization.

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



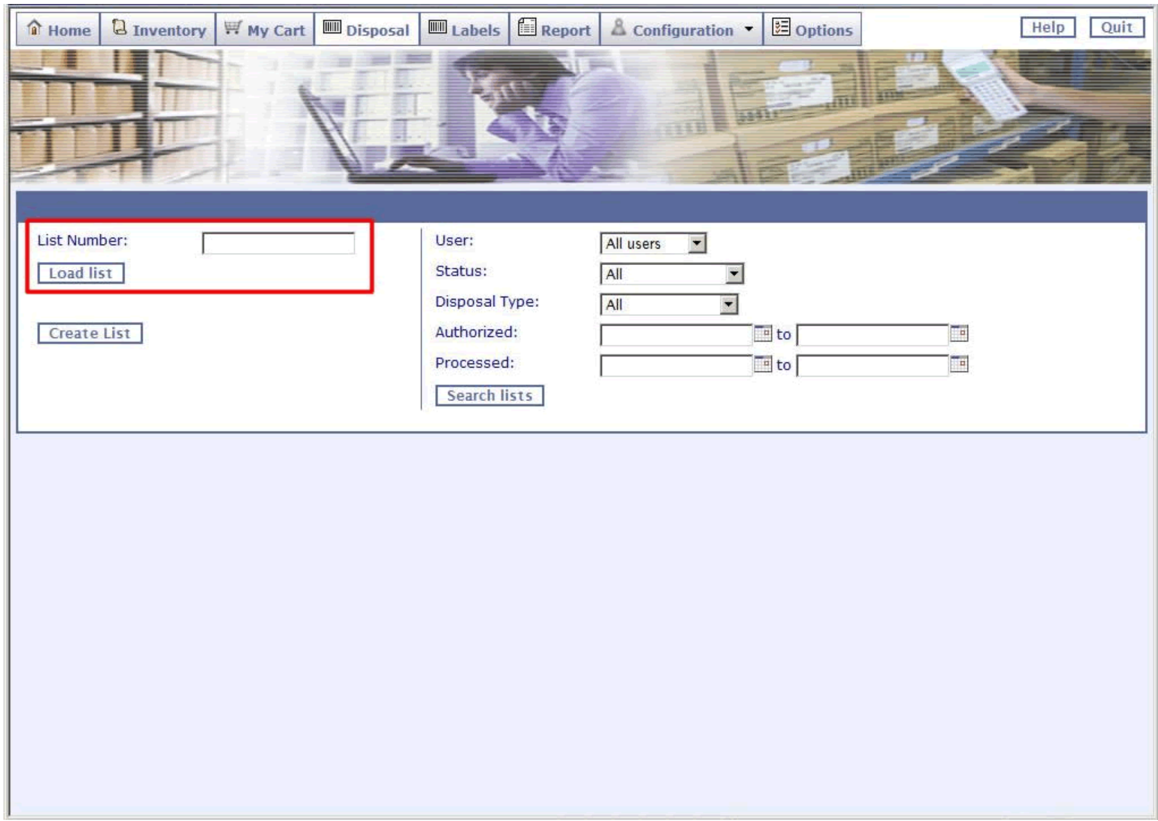
From here you can print the report by using your browser's printing ability as shown in the picture above.

Note that 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 picture 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.



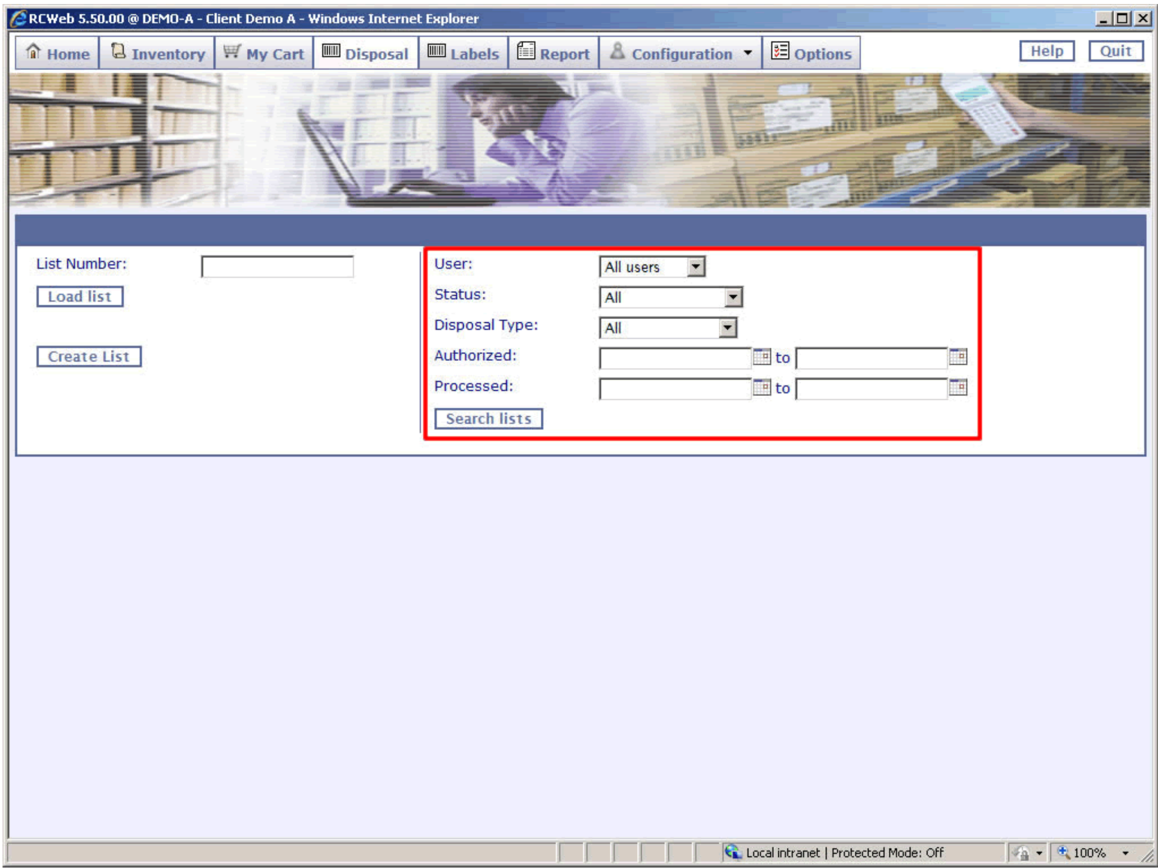
6.2.2 Viewing/Editing an Existing List

To view an existing disposal list simply enter the list number in the "List Number" field and click on the "Load List" button to view it. If you don't know the list number you will have to search 86 the list instead.



6.2.3 Searching For an Existing List

You can search disposal lists by using the different search criteria as seen in the picture below. Alternatively if you already know the list number you are looking, you can simply load 85 the list.



Specifically 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, simply press on the "Search" button. The results will be shown below the search filters.

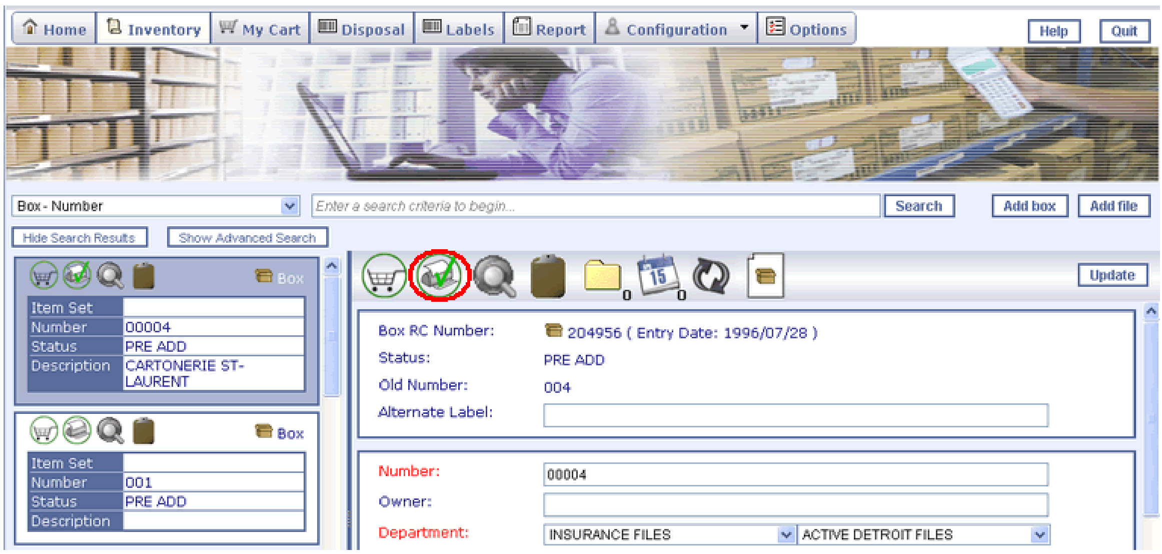
7 Labels Tab

7.1 How to Print Labels in ActiveWeb

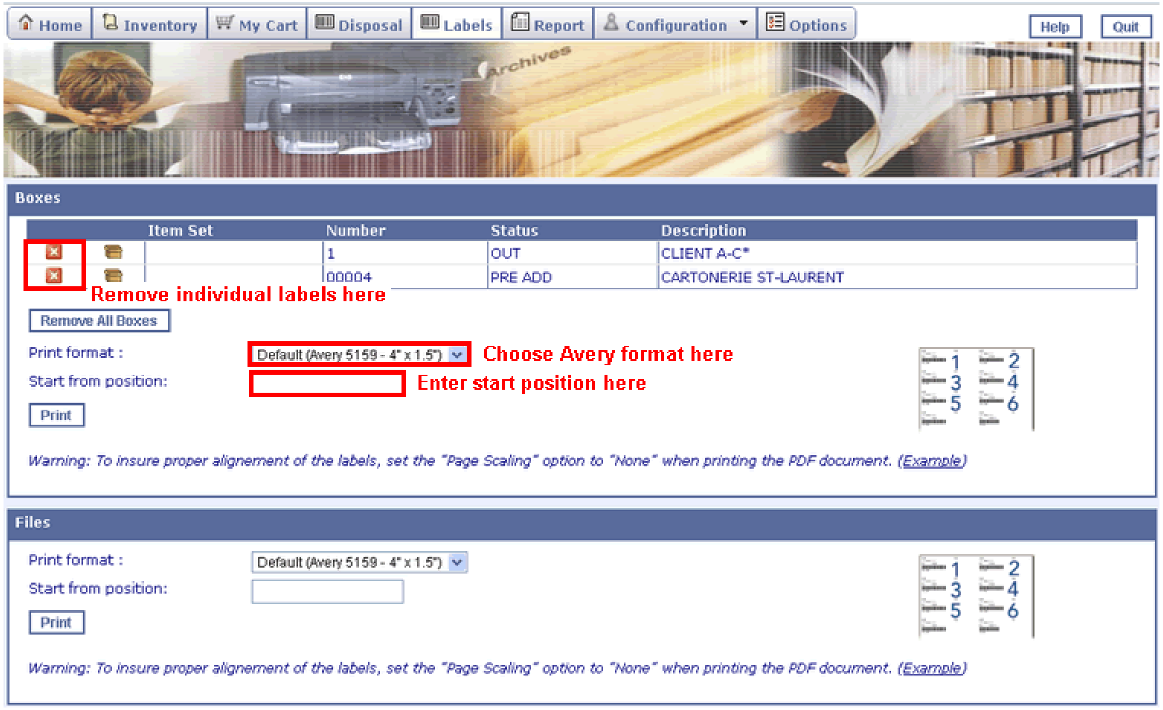
ActiveWeb enables you to print your own labels for boxes and files if you have a printer in your office. The labels are printed on Avery sheets. The Avery models available in ActiveWeb are defined by your record center. If you wish to use a specific Avery model other than the default ones, ask your record center to see if that model is available in ActiveWeb.

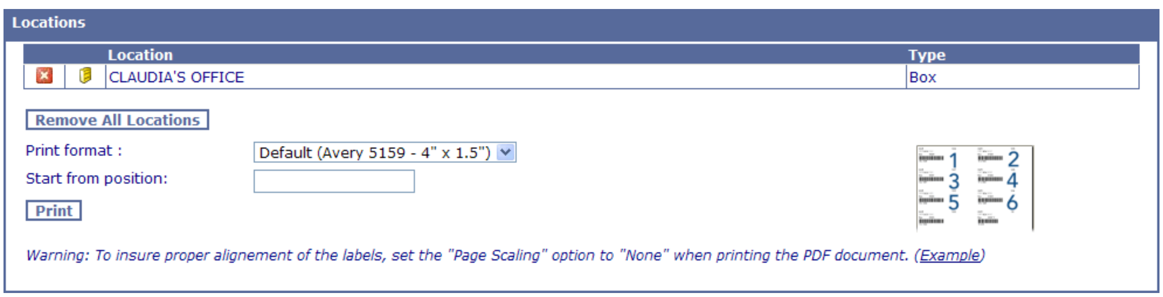
Printing labels in ActiveWeb is very simple. Simply follow the steps below:

1. In order to add boxes and/or files and/or locations to the print list, go in the inventory tab and press on the "printer" icon for each item you wish to add. Here is a picture to illustrate:



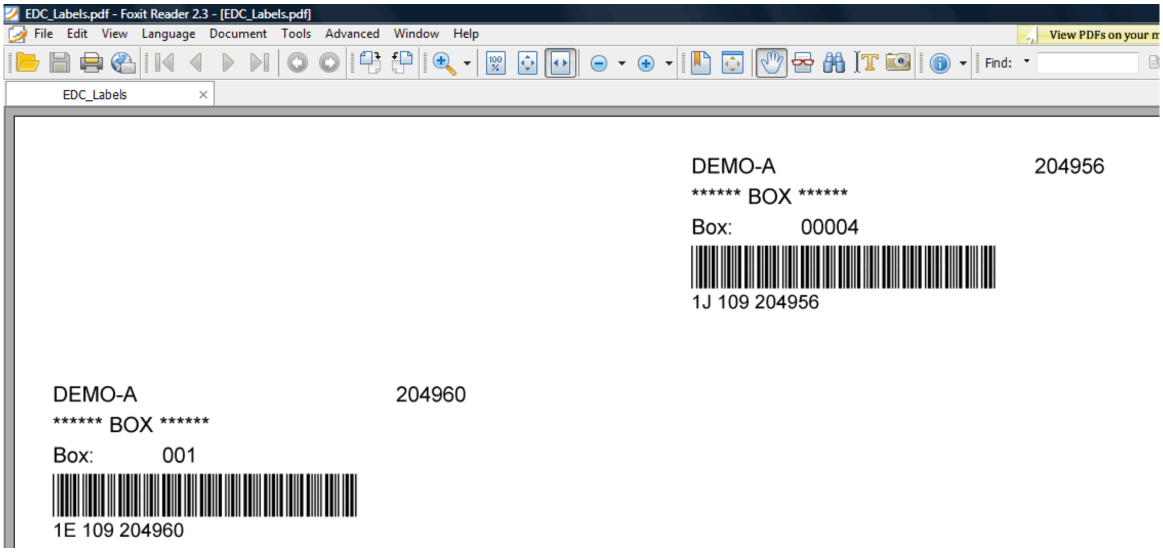
2. Then when you've added all the items you want to print, browse to the "Labels" tab.





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 of the sheet. This is used to maximize the label usage of every Avery sheet.

For example if we said to start printing from position 2, the labels on the sheet would print like this:



3. When you are ready to print your labels simply press on the "Print" button to start printing.

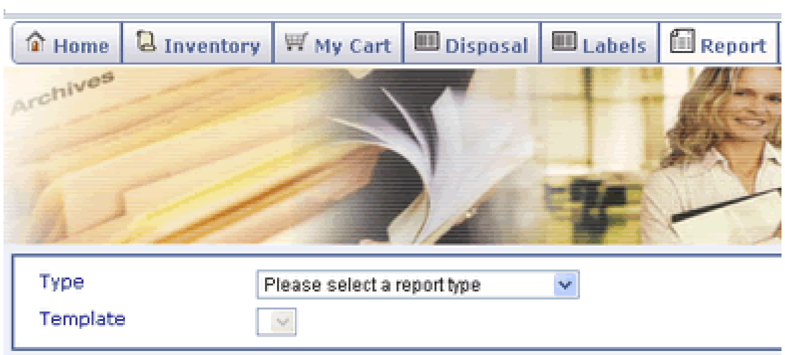
8 Report tab

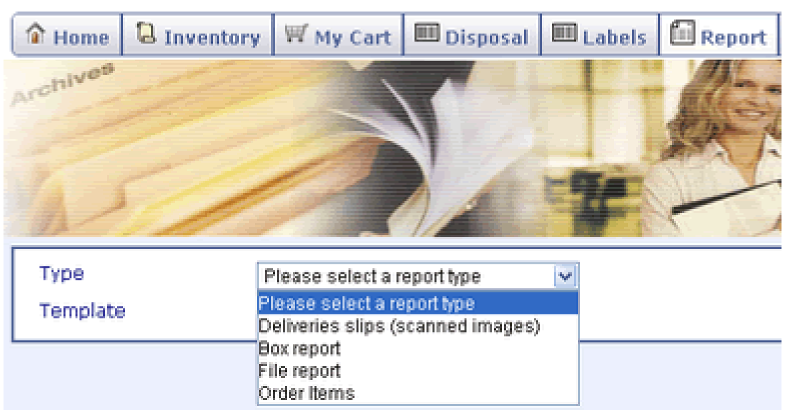
8.1 How to Create Reports in ActiveWeb

The reports tab in ActiveWeb enables you to browse 4 types of reports:

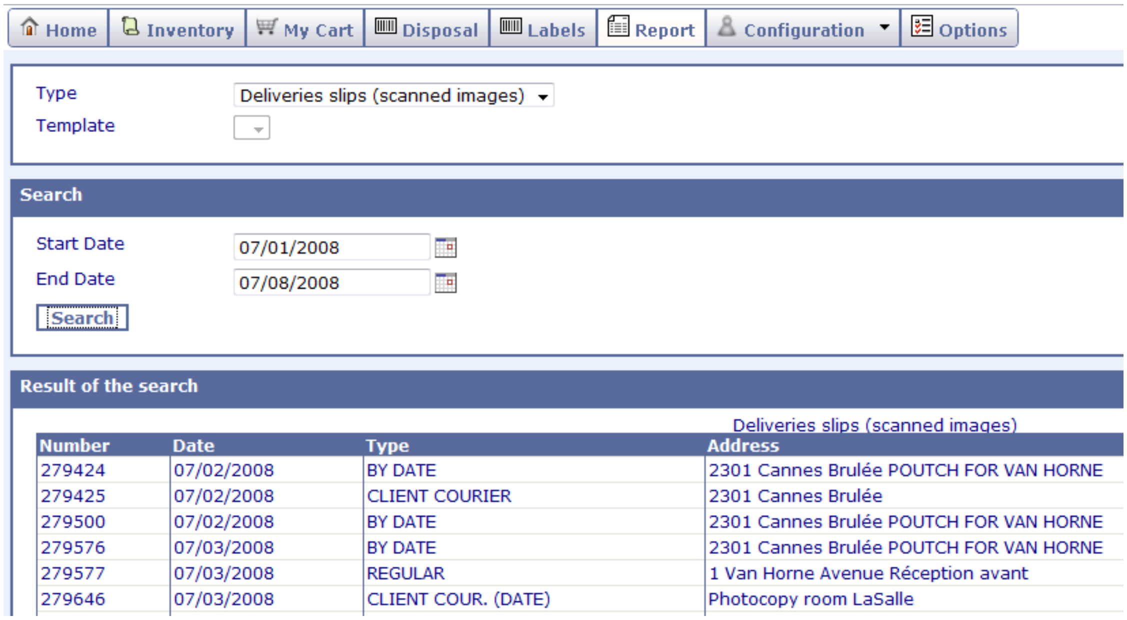
- Delivery slips (scanned images)
- Ordered items
- Box Inventory
- File Inventory

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





Viewing Delivery Slips



Here the procedure is quite straight forward. All you have to do is search for a date range at which you know a delivery was likely to have occurred. You can 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 like in the picture above.

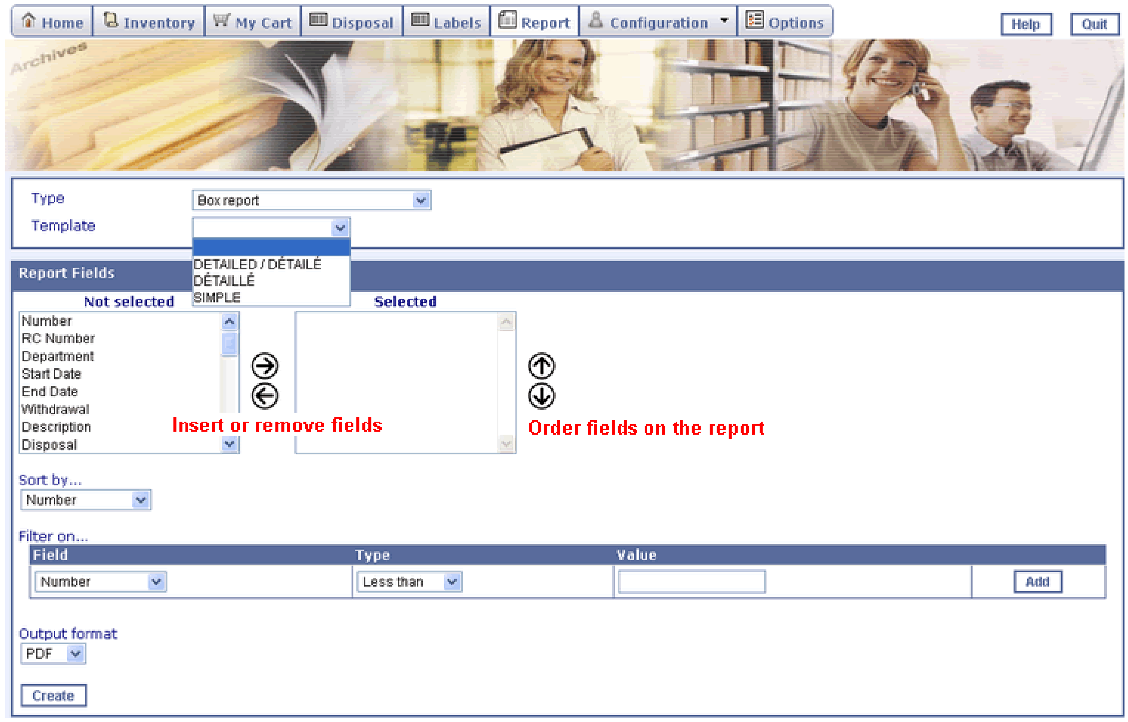
Note: The date range cannot exceed 62 days.

When you click on one of these, 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

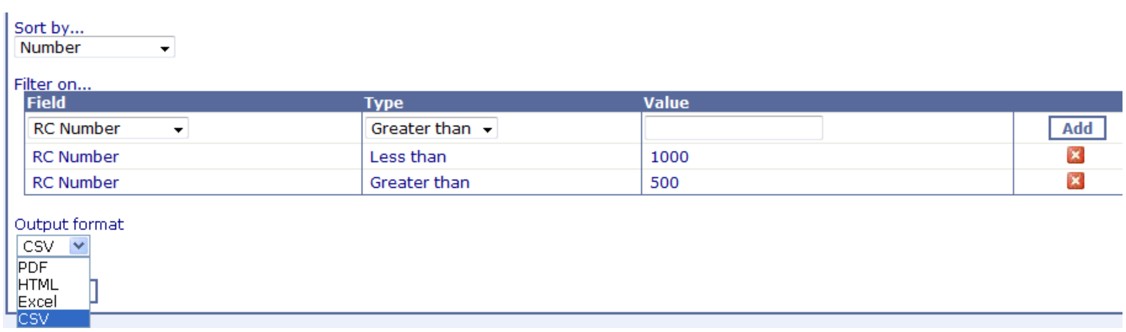
Here the process is the same for boxes or files so I will just show and example for boxes.

You can either choose a pre made template that your record center may have generated in advance for you or you can build the report from scratch. If the record center generated some templates for you, you will see them appear in the drop-down field called "Template" as in the screenshot below:



If you don't want to use one of these templates and you want to create your own from scratch, all you have to do is "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 arrows.

Then when your fields are selected you can choose which field the report is going to be sorted by, the output format (PDF, HTML, Excel or CSV) like in the next picture. You can also add filters to your search on several fields as you can see below.

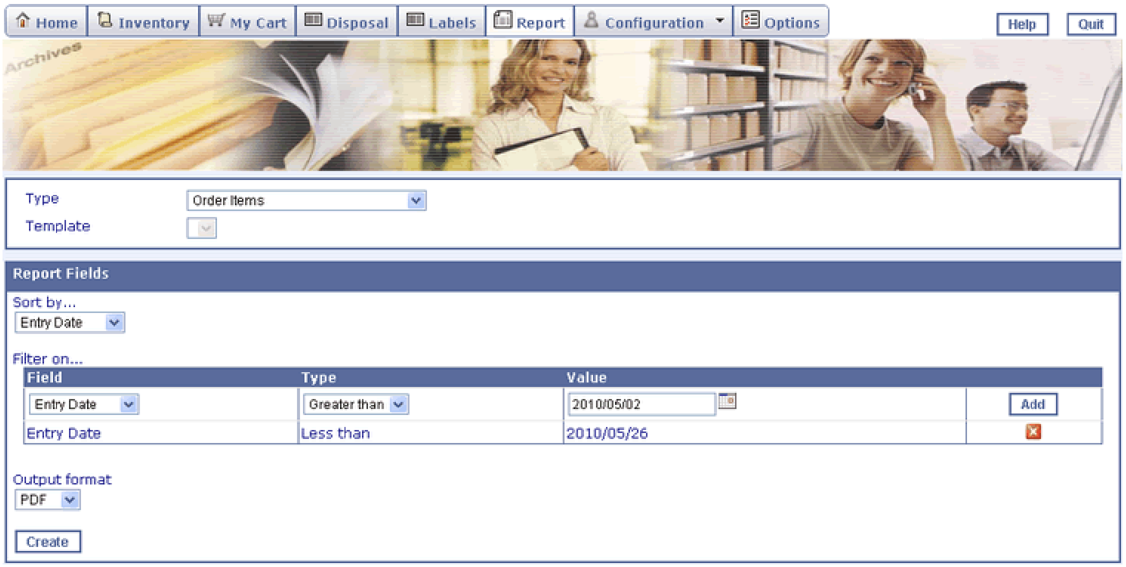


To add a filter you simply choose which field to filter by in the drop down menu, the type of filter (<, >, = etc..) and a value if needed and you press the "Add" button to add the filter.

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

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 you simply filter on a date or date range like in the picture below:



Again here you can sort the report by various fields and you can also 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 AU(
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, user accounts and holidays.

This tab is only available when using the Physical Document Management version of the web interface. For more information, please contact your record center.

9.1 Departments

You can now manage departments from within ActiveWeb. To access this function, simply click on the Configuration tab and select the Department menu item. Here's a picture of what you might find when entering the department module of ActiveWeb:

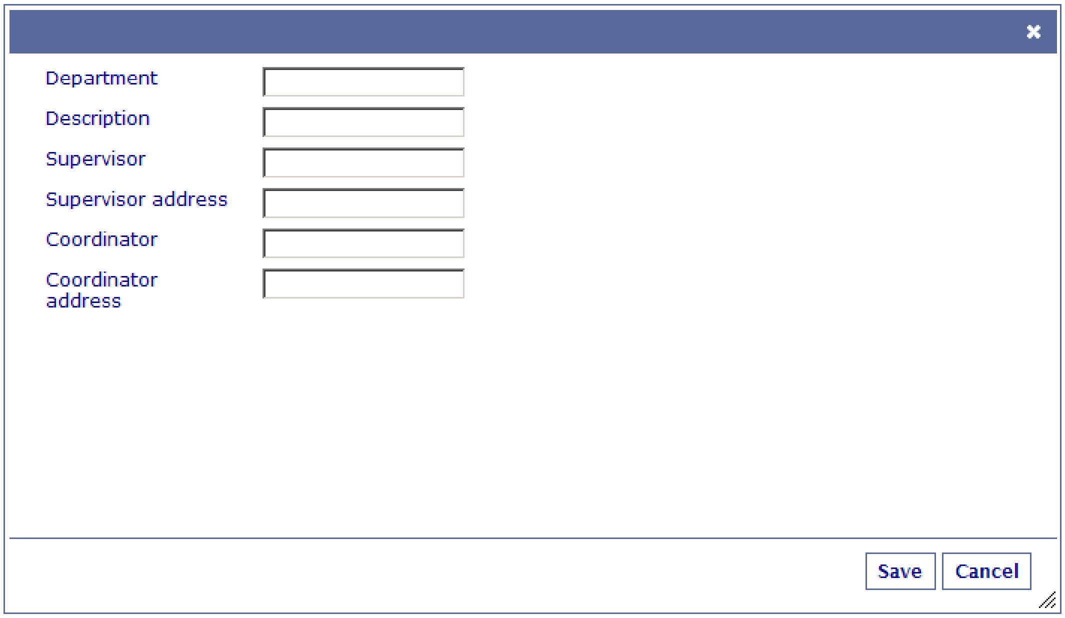
Here you can add, edit and delete main and sub departments.

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

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

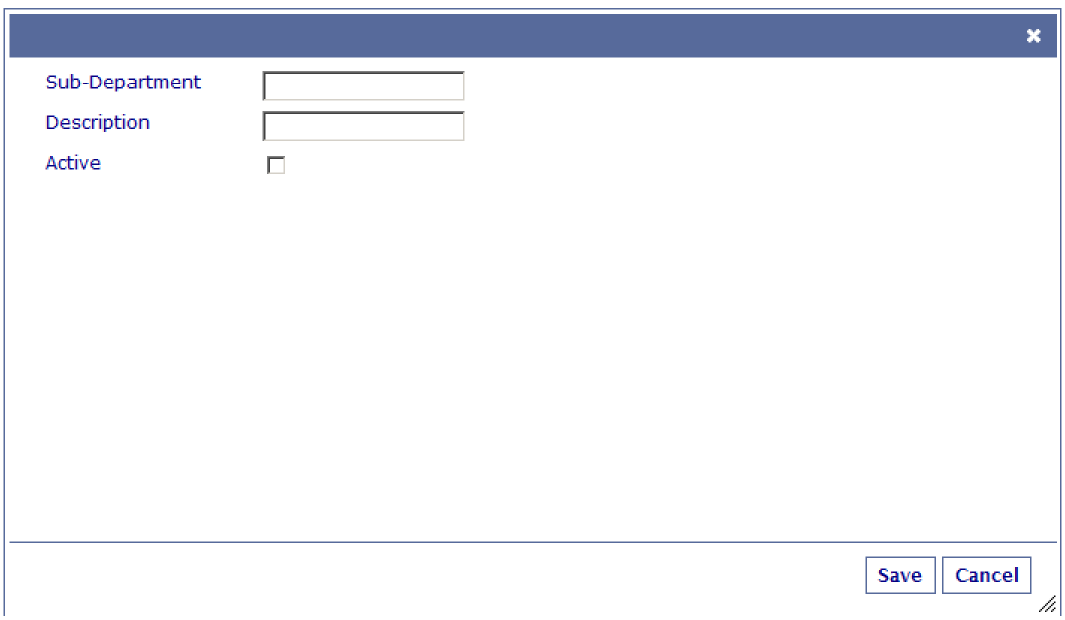
Adding and Editing Departments

Whether you are adding a new department or editing an existing one, the interface is the same for both. Here's what it looks like:



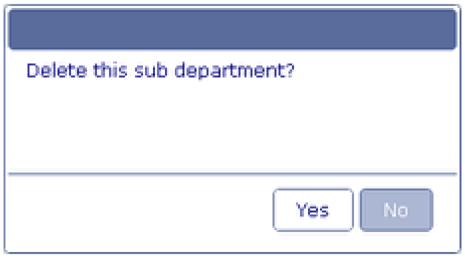
From here you simply fill in the fields you need to and then press the "Save" button when done.

The same idea goes for editing or adding sub-departments:



Deleting or deactivating a Sub-Department

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



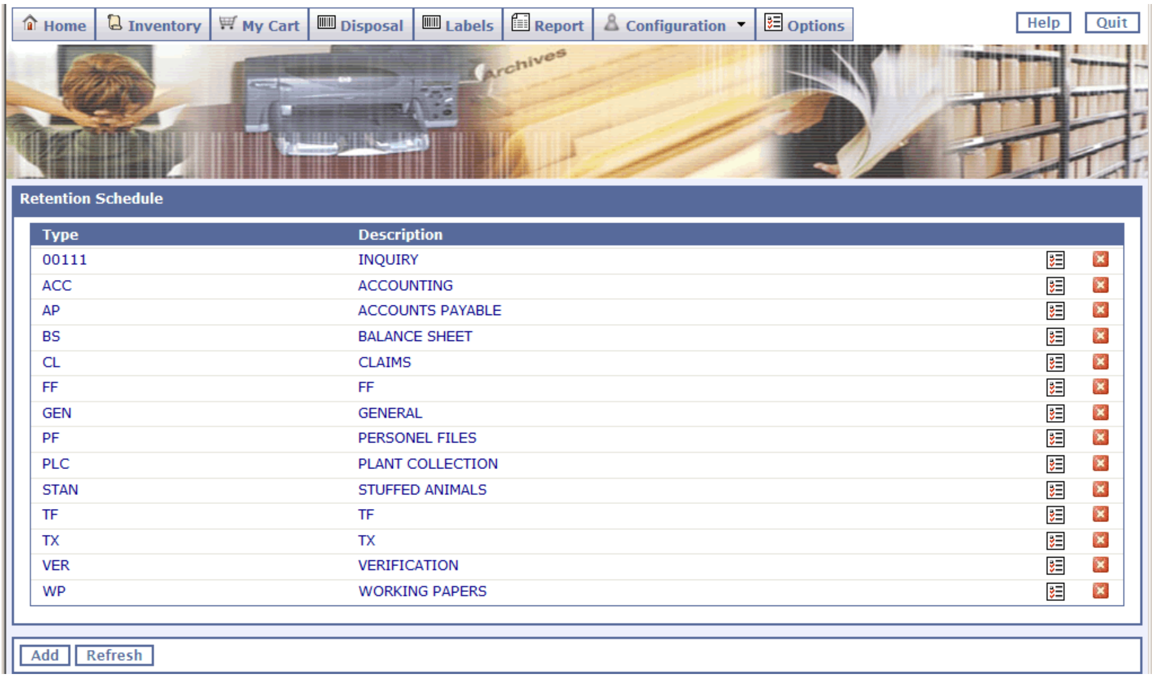
- Press Yes to go on deleting the sub-department.

Note: **In order to delete a sub-department it must not be assigned to any box or file.**

- To deactivate a sub-department, uncheck the Active check 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 now 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, simply click on the Configuration tab and select the Retention Schedule menu item.Here's a picture of what you might find when entering the Retention schedule module of ActiveWeb:



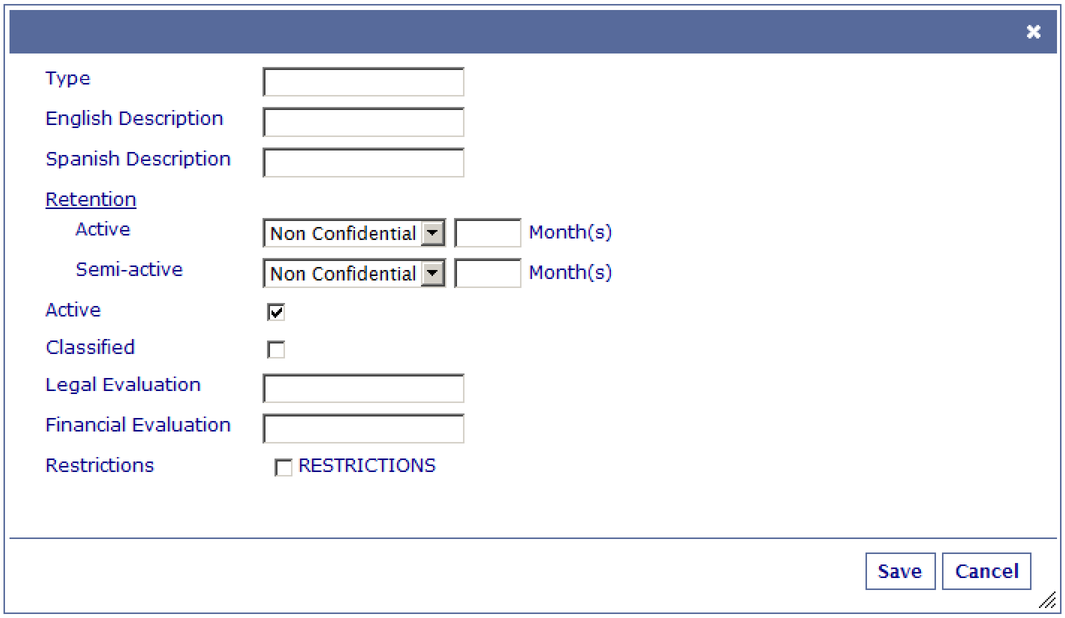
Here you can add, edit and delete retention schedules.

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 EDC ActiveFile Software installed and replicated with your record center.
- Your user settings at the record center prevents you from editing retention schedules.

<u>Adding and Editing Retention Schedules</u>

Whether you are adding a new retention schedule or editing an existing one, the interface is the same for both. Here's what it looks like:



From here you simply fill in the fields you need to and then press the "Save" button when done.

Here is a description of the fields you see 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 EDC 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.

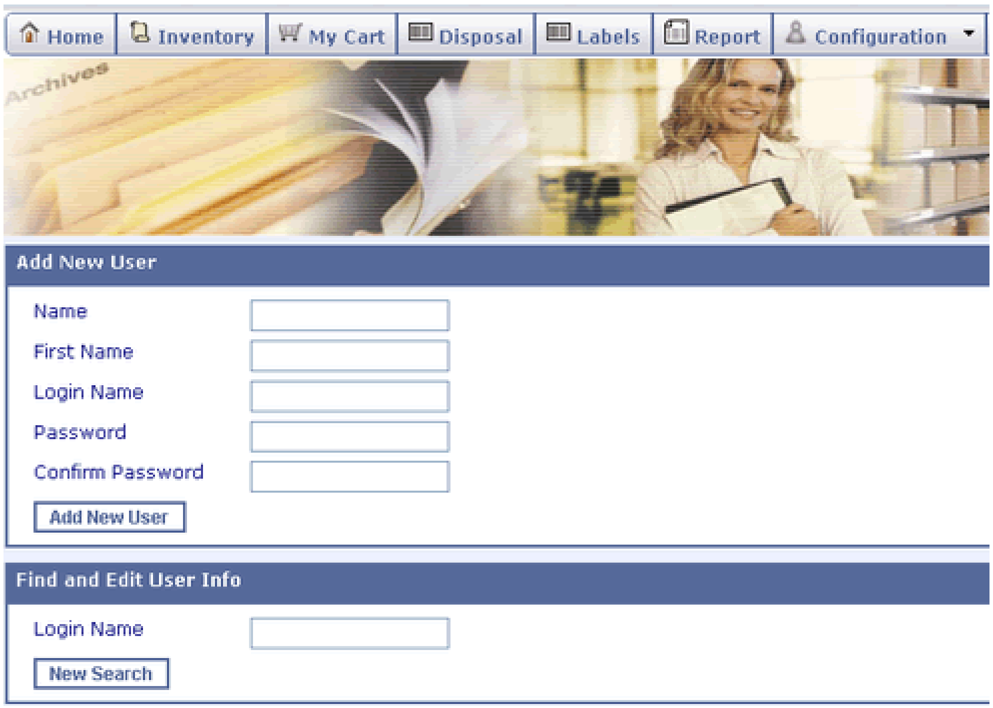
Financial Evaluation
Indicates how long the document needs to be conserved from a fiscal point of view.

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

9.3 Users

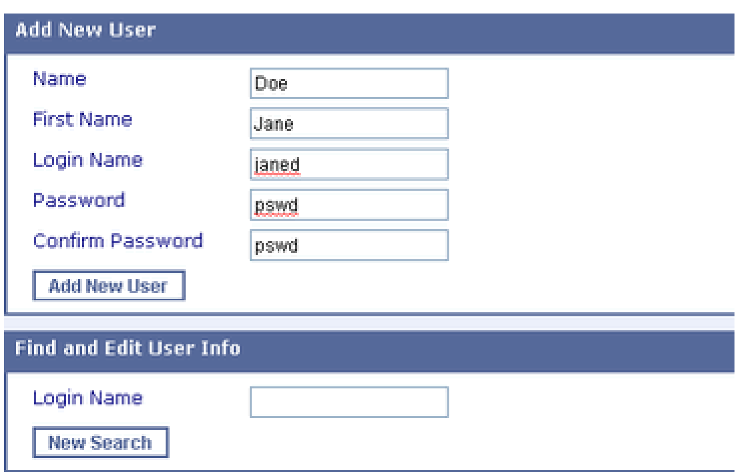
The user section allows the addition of new users to ActiveWeb and also allows existing users info to be edited. To access this function, simply click on the Configuration tab and select the User menu item. When you first open the User module this is what you see:

Note: Not every user have access to the "user" tab because of its administrative features. If you think you require it just ask your record center to give you access to it.

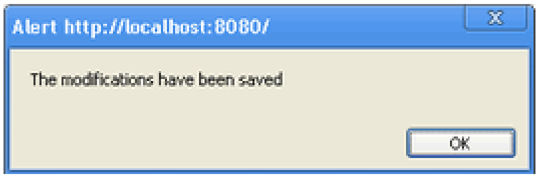


Adding users

To add a new user you simply fill the "Add New User" form and press the "Add New User" button when you are done :

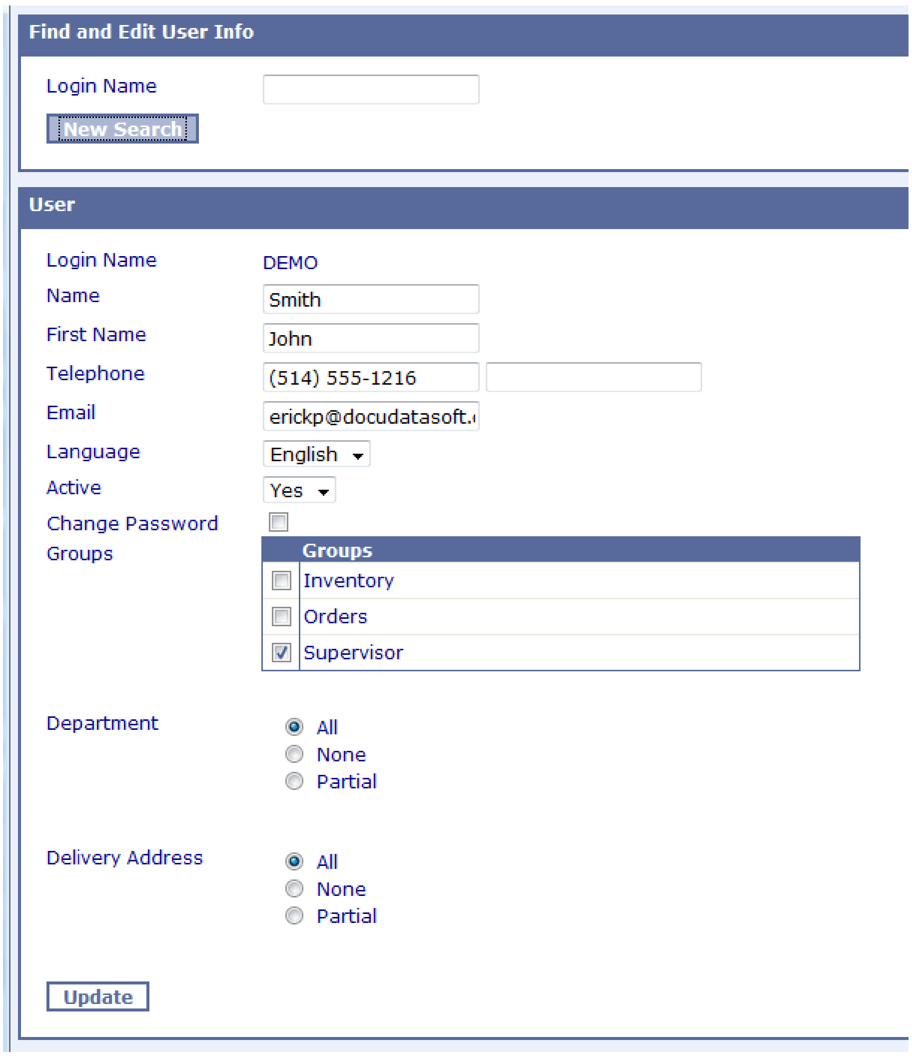


When the user gets added you'll get a confirmation message:



Editing an existing user

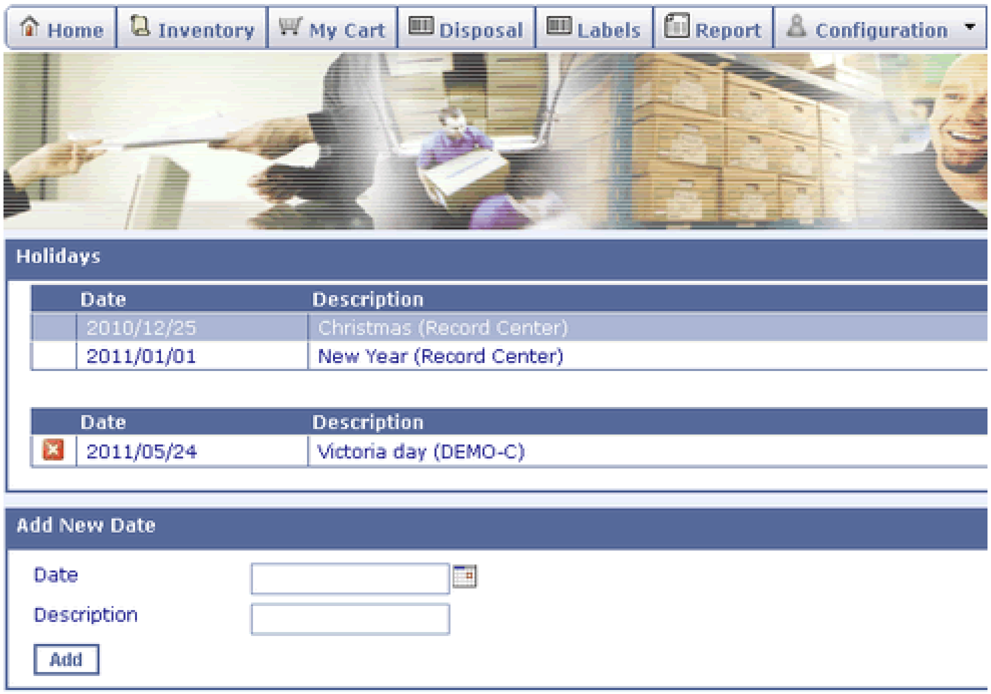
To edit an existing user you fist have to search which user to edit. When the user is found its details will be shown like in the picture below:



At this point all you have to do is make the appropriate modifications and click the "Update" button when done.

9.4 Holidays

Viewing and managing holidays in ActiveWeb is very straightforward. The "Holidays" section is divided in two parts. The upper part shows the holidays defined at your record center. The bottom part shows your holidays. You can easily tell which is which because 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 or delete one of your holidays, you can simply add one with the "Add New Date" form and/or delete the ones you already have with the next to a holiday.

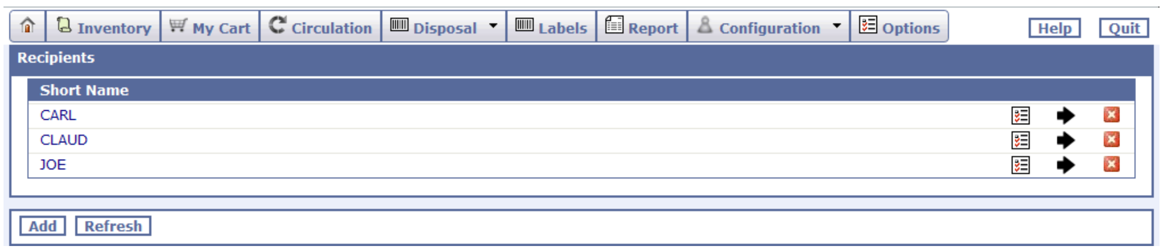
Note: Holidays coming up in the next 7 days are also shown on the home page of ActiveWeb when you log in.

9.5 Recipients

The recipient is the person that receives the item (box, tape or file); this person may or may not have user rights in ActiveWeb.

In order to manage recipients efficiently and keep track of them, enter the 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.

NOTE: Adding recipients in this list is not compulsory if the 'Require Valid Recipient' option (in the Customer Information module) is set to No. In this case the system will accept any recipient name. Contact your Record Center to change your settings.



Adding a recipient

1. Verify if the recipient is already in the list. If not, press on the *Add* button.

2. Enter the information in the following fields:

Short name
The information in this field should be chosen to reflect the person's information as much as possible, since 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
Checkbox indicating that this recipient uses ActiveWeb. When a recipient doesn't need access to ActiveWeb anymore or simply stopped working for your company, always chose to de-activate it first before deleting it altogether. You can do this by simply unselecting 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 the file back in the physical folder.

3. Press *Save* to accept the addition or *Cancel* to exit the window.

Editing the recipient's information

Since the short name is used as the main identifier for a recipient's information, one 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 press *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 (e.g JO) and you would like to reuse its 'short name' for another user (e.g JOE).

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

1. Click on the black arrow 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 JO) and/or select it. Press Save.

3. A confirmation message appears. Press 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 simply unselecting the Active checkbox 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:

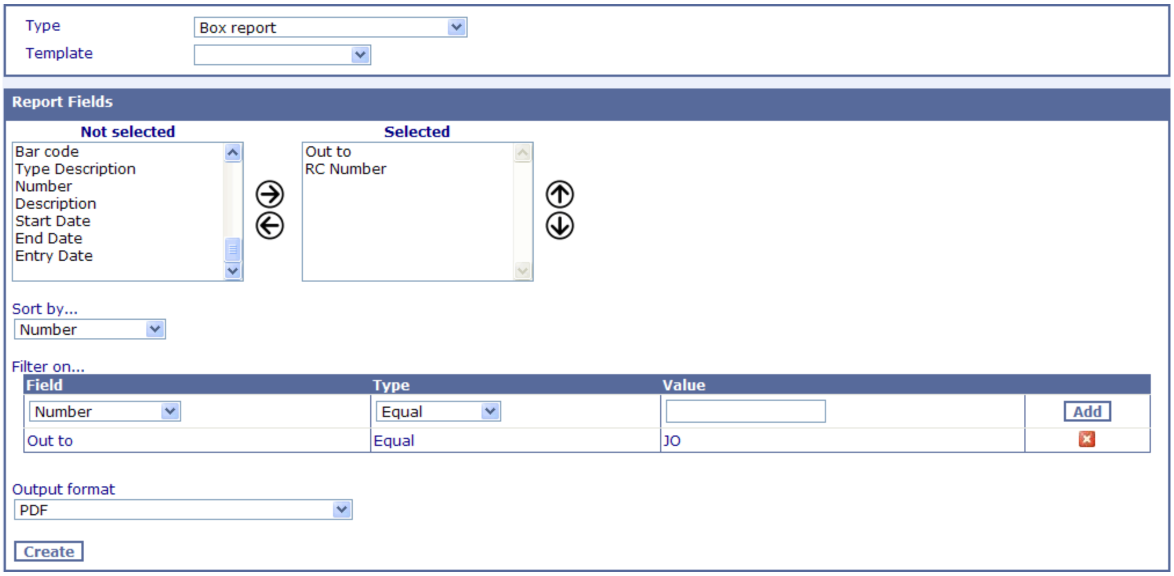
1. Click on the 'X' beside the recipient you want to delete.

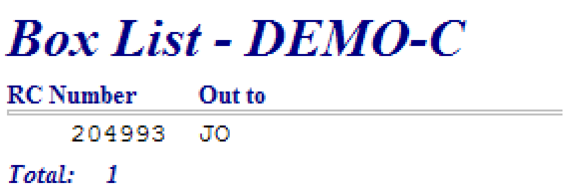
2. The system will check if the recipient has any items in his possession (OUT(IN-HOUSE) or OUT).

If the recipient has any items, we suggest you press No. First, run a report based on the following steps :

i. Go in the Report tab.
ii. Select the Box report option.
iii. Send the Out to and the RC number fields in the 'Selected' column.
iv. Add a filter with the following information :
Field: 'Out to' **Equal** **Value:** (Short name of the recipient you want to delete)
v. Select an output format.
vi. Create the report and print it (if need be). Repeat the steps to create a File report.

E.g





3. Proceed to transferring this recipient's boxes to either the record center 77, another recipient 18 or to an internal location 72.

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

Refreshing the screen

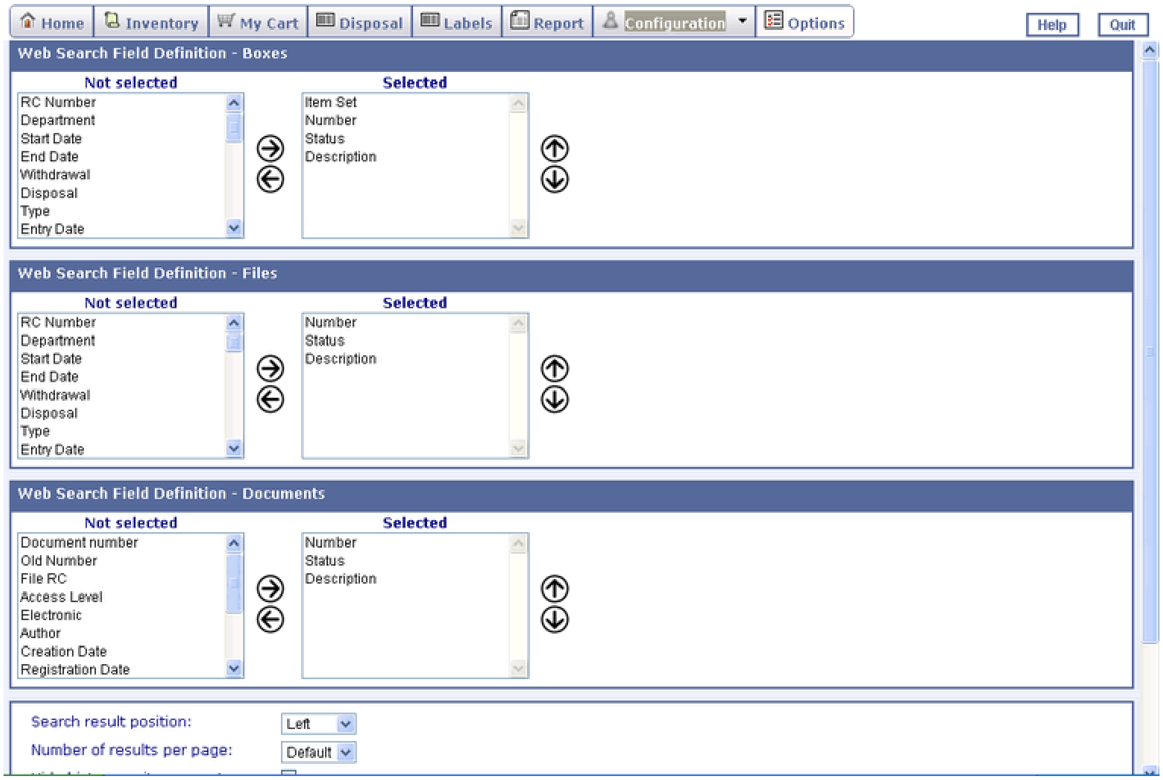
The refresh button at the bottom of the list is especially useful if many people have access to the recipient's module (e.g if your company has more than one supervisor). Simply press on the button and the most recent information will be displayed on screen.

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.

Here is what you see when you open the "Options" tab:

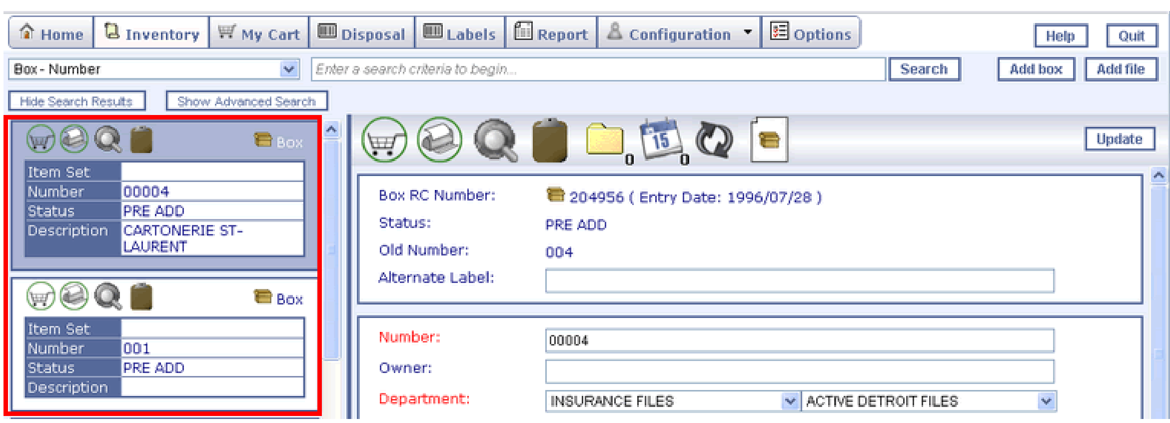


For Web search definitions

You simply 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. Here is an example when the search results are on the left :



- 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 16.

- 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 the "Select directory" button and select a folder. To view the current directory you are using click at the right of the button.

If you have any comments or questions on this manual please write to support@docudatasoft.com