



EDC ActiveWeb
Basic User Guide

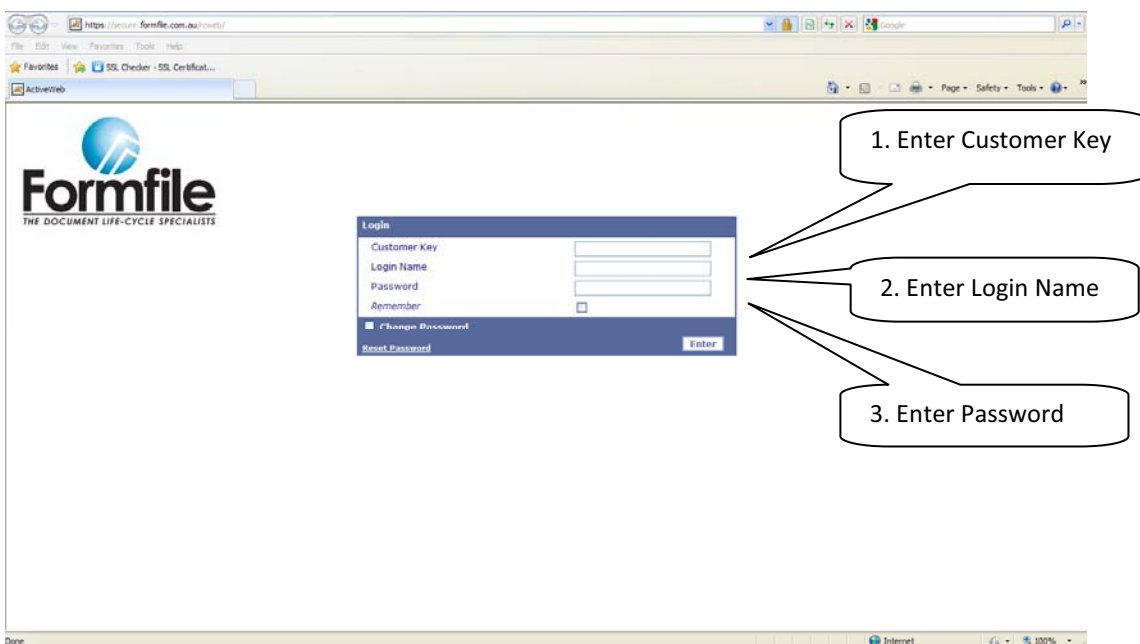
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IT Business Consultant
Formfile Records Management Group*

EDC ActiveWeb - Login

1. Please open Internet Explorer, on the "Address bar" please go to www.formfile.com.au.
2. Select EDC ActiveWeb login from the bottom of the homepage. Please click on "Help Centre" link on the homepage if further assistance required.



3. The EDC Client Web login page will then be shown below. Please enter Customer Key, Login Name and Password.



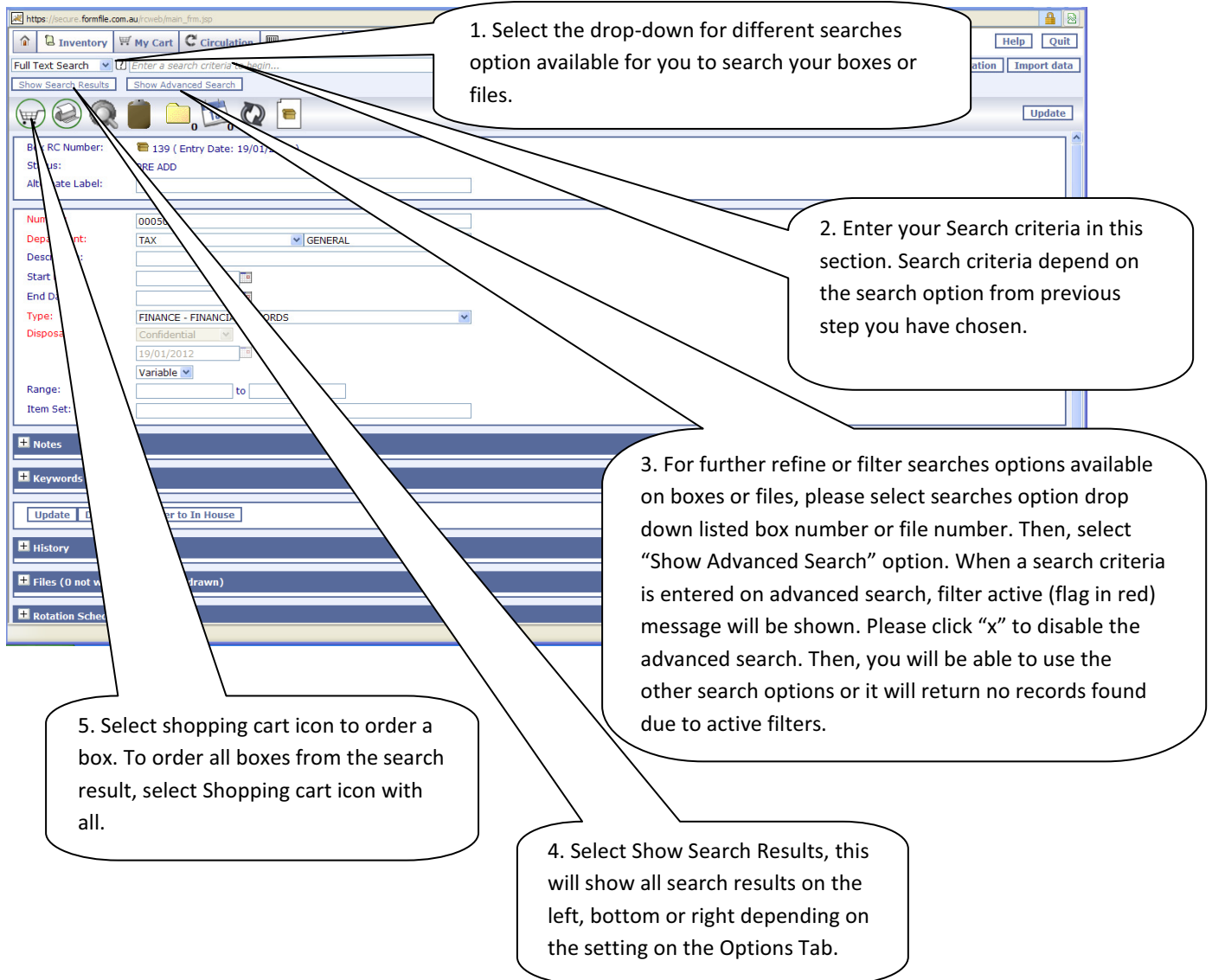
EDC ActiveWeb - Home

1. After successful login into EDC Client Web, the following page will be shown below.



EDC ActiveWeb - Inventory

1. Inventory tab will show all boxes and files belong to your company. There are different options listed as below.

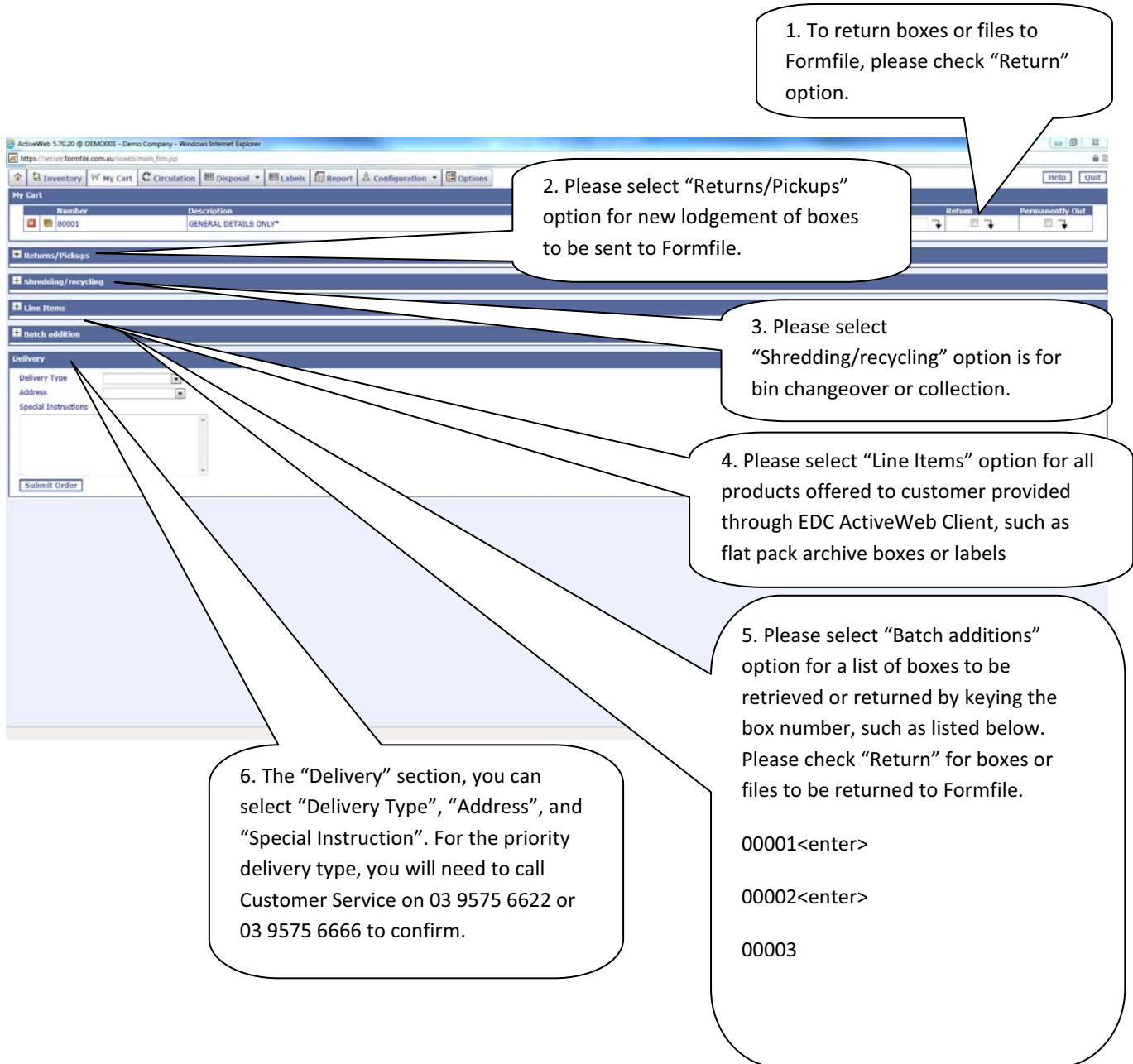


The screenshot shows the 'Inventory' search page in the EDC ActiveWeb application. It features a search bar at the top with a dropdown menu for search types (Full Text Search, etc.), a search input field, and buttons for 'Show Search Results' and 'Show Advanced Search'. Below the search bar is a form for entering search criteria, including fields for 'Barcode Number', 'Status', 'Department', 'Start Date', 'End Date', 'Type', 'Disposition', 'Range', and 'Item Set'. A sidebar on the left contains navigation options like 'Notes', 'Keywords', 'History', 'Files', and 'Rotation Schedules'. Five callout boxes provide instructions on how to use the search interface.

1. Select the drop-down for different searches option available for you to search your boxes or files.
2. Enter your Search criteria in this section. Search criteria depend on the search option from previous step you have chosen.
3. For further refine or filter searches options available on boxes or files, please select searches option drop down listed box number or file number. Then, select "Show Advanced Search" option. When a search criteria is entered on advanced search, filter active (flag in red) message will be shown. Please click "x" to disable the advanced search. Then, you will be able to use the other search options or it will return no records found due to active filters.
4. Select Show Search Results, this will show all search results on the left, bottom or right depending on the setting on the Options Tab.
5. Select shopping cart icon to order a box. To order all boxes from the search result, select Shopping cart icon with all.

EDC ActiveWeb – My Cart

1. Select My Cart. This will show all orders and additional items or services from Formfile.



The screenshot shows the 'My Cart' page in a web browser. The page has a navigation menu with options: Inventory, My Cart, Circulation, Disposal, Labels, Report, Configuration, and Options. Below the menu is a table with columns 'Number' and 'Description'. The first row contains '00001' and 'GENERAL DETAILS ONLY*'. Below the table are several expandable sections: 'Returns/Pickups', 'Shredding/recycling', 'Line Items', and 'Batch addition'. The 'Delivery' section is expanded, showing fields for 'Delivery Type', 'Address', and 'Special Instructions', along with a 'Submit Order' button.

1. To return boxes or files to Formfile, please check "Return" option.

2. Please select "Returns/Pickups" option for new lodgement of boxes to be sent to Formfile.

3. Please select "Shredding/recycling" option is for bin changeover or collection.

4. Please select "Line Items" option for all products offered to customer provided through EDC ActiveWeb Client, such as flat pack archive boxes or labels

5. Please select "Batch additions" option for a list of boxes to be retrieved or returned by keying the box number, such as listed below. Please check "Return" for boxes or files to be returned to Formfile.

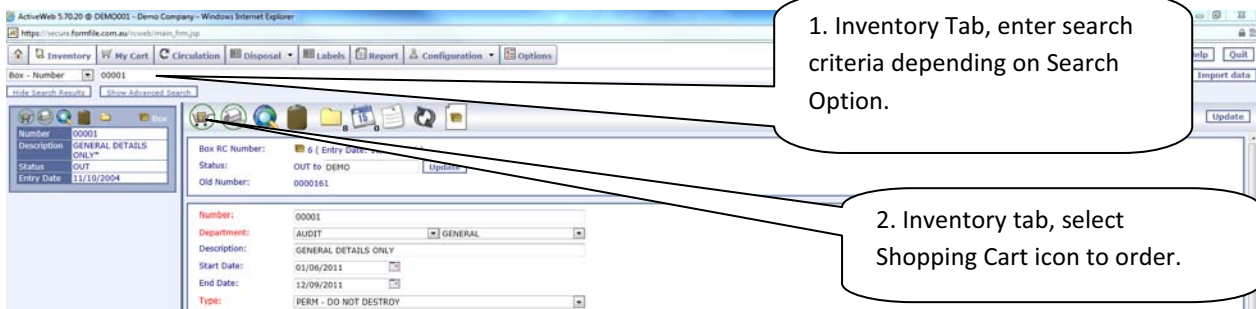
00001<enter>
00002<enter>
00003

6. The "Delivery" section, you can select "Delivery Type", "Address", and "Special Instruction". For the priority delivery type, you will need to call Customer Service on 03 9575 6622 or 03 9575 6666 to confirm.

EDC ActiveWeb – Retrieval, Re-lodgement and New lodgement

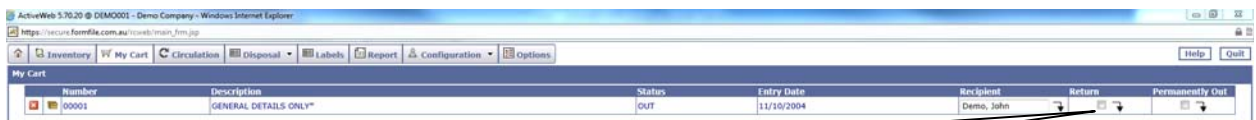
1. Retrieval, Re-lodgement and New lodgement of boxes. There are 3 options you can utilise for ordering boxes or files.
 - a. For new lodgement of boxes where Formfile never had the boxes before, customer required to order the new barcodes labels to be put on their boxes. When this happens, the EDC system will automatically generate a new box number continue from the last box number if any. The box number will appear in the EDC system as PRE ADD status. After customers apply the barcode on the boxes, more information can be enter by searching on the boxes or files from “Inventory”.
 - b. For retrieval and returned of boxes or files, customer can follow the following options.

Option 1: Box numbers already appear in EDC system for Retrieval, Re-lodgement and New lodgement.



1. Inventory Tab, enter search criteria depending on Search Option.

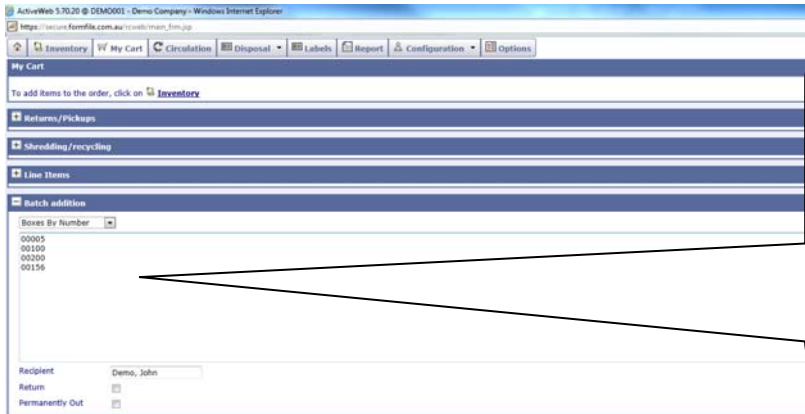
2. Inventory tab, select Shopping Cart icon to order.



Number	Description	Status	Entry Date	Recipient	Return	Permanently Out
00001	GENERAL DETAILS ONLY*	OUT	11/10/2004	Demo, John	<input type="checkbox"/>	<input type="checkbox"/>

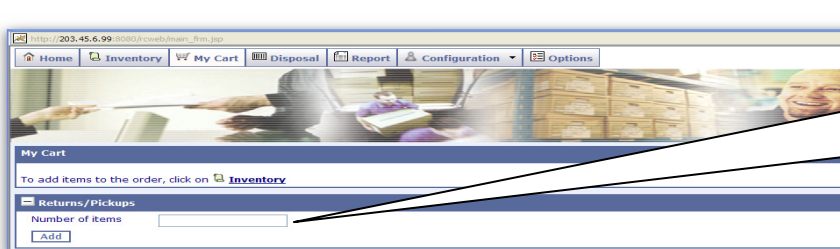
3. My Cart tab, select this option “Return” option, if you would like to return the selected box to Formfile. Currently box 00001 is “OUT” which mean you have the box at your location. When you wish to return the box to Formfile, you are required to check under Return option.

Option 2: Box numbers already appear in EDC system for Retrieval, Re-lodgement and new lodgement.



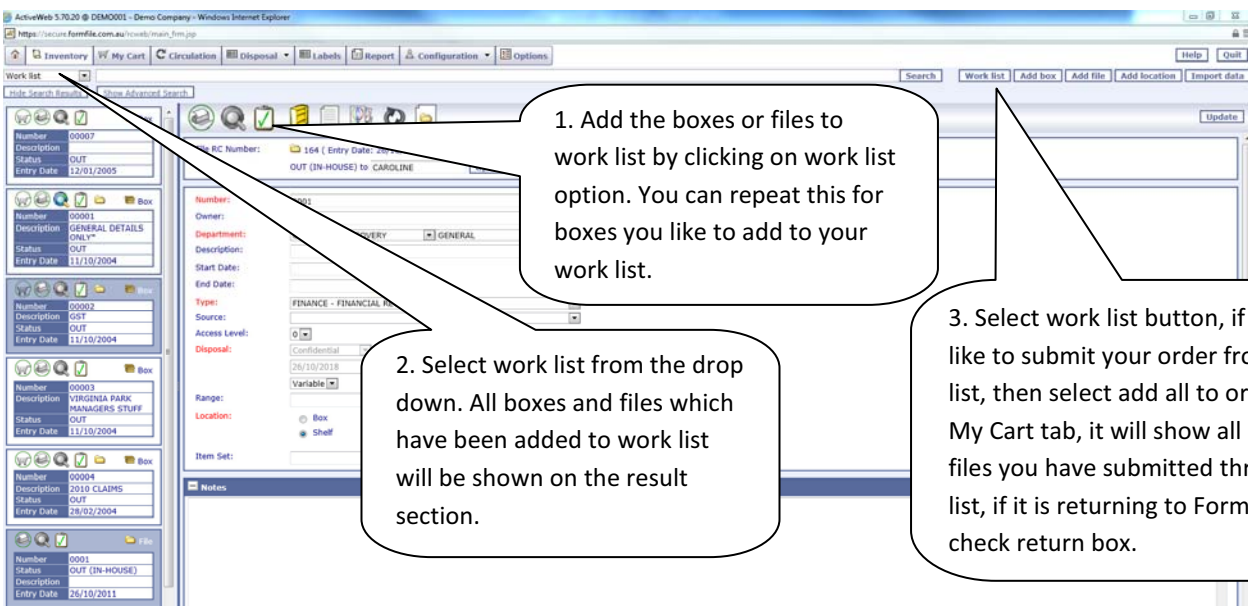
1. My Cart Tab, select Batch Addition and enter box numbers that you will like to order. Please check "Return" option, if you will like to return the boxes to the Formfile. The Batch Addition does not show detailed box information and you can manually enter the box number or copy and paste from other programs such as MS Word or MS Excel or Text.

Option 3: For new lodgement, Box returns to Formfile Records Centre. Assuming boxes are already in the EDC system or Formfile can do the data entry for you on arrival.



1. My Cart tab, enter total number of new boxes for pickups/return to Records Centre.

Option 4: Box returns or retrievals from Formfile using "Work list". Assuming boxes are already in the EDC system.



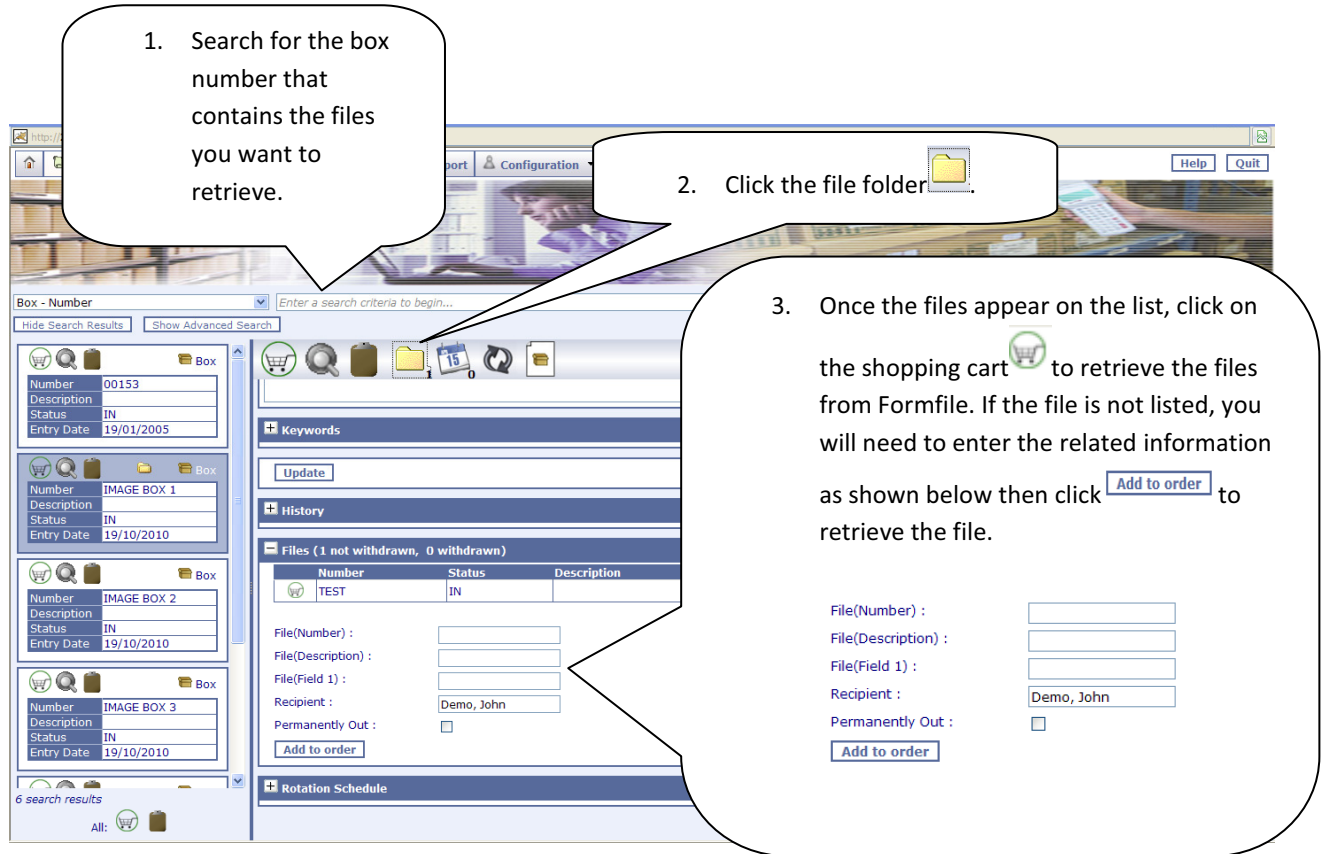
1. Add the boxes or files to work list by clicking on work list option. You can repeat this for boxes you like to add to your work list.

2. Select work list from the drop down. All boxes and files which have been added to work list will be shown on the result section.

3. Select work list button, if you would like to submit your order from the work list, then select add all to order. Go to My Cart tab, it will show all boxes or files you have submitted through work list, if it is returning to Formfile, please check return box.

2. File retrieval in EDC ActiveWeb from Formfile.

Option 1: New File retrieval for which there are no record in the EDC ActiveWeb.



1. Search for the box number that contains the files you want to retrieve.

2. Click the file folder icon.

3. Once the files appear on the list, click on the shopping cart icon to retrieve the files from Formfile. If the file is not listed, you will need to enter the related information as shown below then click **Add to order** to retrieve the file.

File(Number) :

File(Description) :


File(Field 1) :

Recipient :

Permanently Out :

Add to order

Option 2: New File retrieval for which there are records in the EDC ActiveWeb.



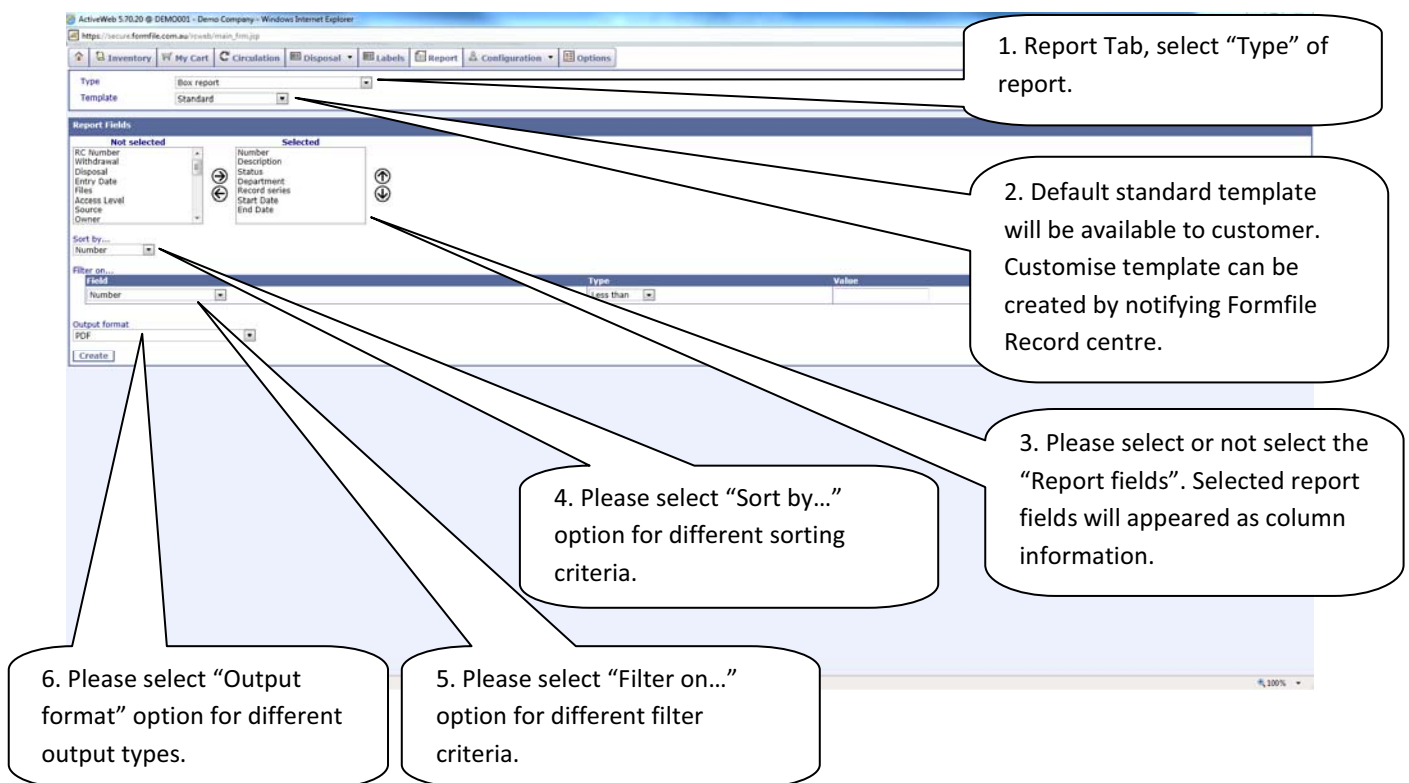
1. Inventory Tab, select Search Option.

2. Please enter search criteria.

3. Please select "Shopping Cart" to retrieve or returned the file.

EDC ActiveWeb – Report

1. Select Report. This provides you with a comprehensive report of all boxes, files, order items and delivery slips (scanned image).



1. Report Tab, select "Type" of report.

2. Default standard template will be available to customer. Customise template can be created by notifying Formfile Record centre.

3. Please select or not select the "Report fields". Selected report fields will appeared as column information.

4. Please select "Sort by..." option for different sorting criteria.

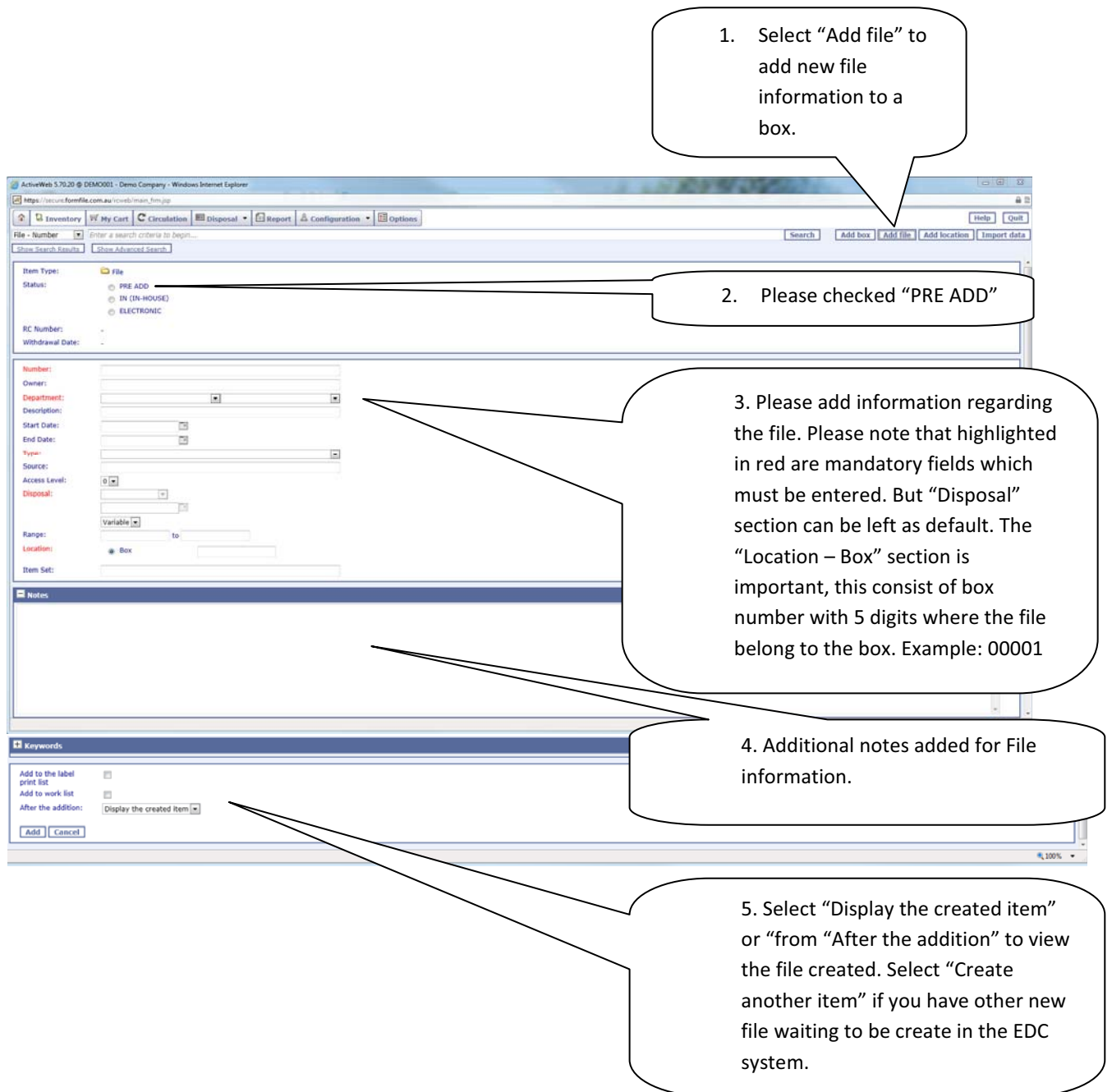
5. Please select "Filter on..." option for different filter criteria.

6. Please select "Output format" option for different output types.

EDC ActiveWeb – Add new files

1. Select Inventory to add new files within the box.

Option 1: New File retrieval for which there are no record in the EDC ActiveWeb.



The screenshot shows the 'Add file' form in the EDC ActiveWeb interface. The form includes sections for 'Item Type' (File), 'Status' (PRE ADD, IN (IN-HOUSE), ELECTRONIC), 'RC Number', 'Withdrawal Date', 'Number', 'Owner', 'Department', 'Description', 'Start Date', 'End Date', 'Type', 'Source', 'Access Level', 'Disposal', 'Range', 'Location' (Box), and 'Item Set'. A 'Notes' section is at the bottom, and a 'Keywords' section is at the very bottom with options to 'Add to the label print list', 'Add to work list', and 'After the addition: Display the created item'. The 'PRE ADD' status is selected, and the 'Location' is set to 'Box'. The 'Number' field is highlighted in red, indicating it is mandatory.

1. Select "Add file" to add new file information to a box.
2. Please checked "PRE ADD"
3. Please add information regarding the file. Please note that highlighted in red are mandatory fields which must be entered. But "Disposal" section can be left as default. The "Location – Box" section is important, this consist of box number with 5 digits where the file belong to the box. Example: 00001
4. Additional notes added for File information.
5. Select "Display the created item" or "from "After the addition" to view the file created. Select "Create another item" if you have other new file waiting to be create in the EDC system.