



**ADVANCE RECORD  
MANAGEMENT**

**WEBSITE INSTRUCTIONS**

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Dear Customer,

Welcome to a new world of records management!

You have chosen to outsource your Records Management to one of Australia's most pro-active record centres. No longer are your records stored "just in case you need them", they are **managed** utilising the world's leading records management software.

Utilising the very latest in web technology, your records are easily inventoried. You can even itemise each file within a box and track all file movements. Never again wonder where a file is, just check its status via the web.

Rather than delivering a hard copy, we can ***scan on demand*** - you can access the image via our very secure web link. Traditional delivery methods are still available.

In today's world, effective management of your records is not just good for business, it's the law. To achieve this successful outcome we need your help :

- Many records have to be kept for a long period of time, so the quality of the box is important. Damaged boxes will need to be re-boxed before we can collect them and we supply quality boxes for this purpose.
- Boxes must be inventoried, otherwise no one knows what they contain. For existing boxes we can supply a proforma spreadsheet for you to complete, and this can be imported into our database. If you have an existing spreadsheet, you will need to cut and paste the data into our proforma spreadsheet.
- All new boxes must be inventoried over the web. We can only collect boxes that have been inventoried.
- The inventorying process includes affixing our barcode identification label to each box. **Boxes will only be collected if they have our barcode label affixed.**

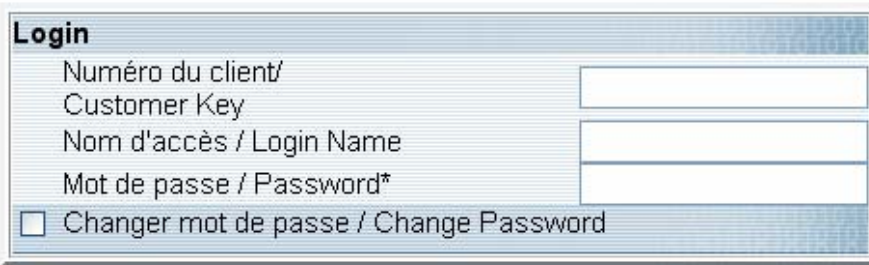
Following these simple steps will ensure your records are managed in the best possible manner and also keep your costs to a minimum.

If you have any questions regarding the process to archive your records, please phone our friendly staff. We will do our utmost to help you.

**Peter Newland**  
**Managing Director**  
Advance Record Management

## How to log into ARM

1. Log on to [www.docstore.com.au](http://www.docstore.com.au) click on **RC WEB**



**Login**

Numéro du client/  
Customer Key

Nom d'accès / Login Name

Mot de passe / Password\*

Changer mot de passe / Change Password

\*Sensible à la case / Case sensitive

Soumettre/Enter

3. Enter your Customer Key No.
4. Enter your Login Name – (first name plus first initial of surname)
5. Enter your Password – (same as above, but only in lower case)
6. Click on the ENTER button and you will be sent to the home page

### WHAT ARE THE ICONS ACROSS THE TOP OF THE SCREEN FOR?



Below is an overview of what each of the icons/modules represent. They are discussed in more detail on the following pages.

<b>HOME</b>	This module is used to return to the EDC Web Home Page
<b>INVENTORY</b>	This module is used to view, update, edit and order your records
<b>MY CART</b>	This module allows you to order line items and request pickups. It also shows you a list of file/boxes ordered and delivery notes.
<b>LABELS</b>	This module is used to create your own box and file labels.
<b>REPORT</b>	This module is used to generate two reports – “Order Items” Report and “Inventory” Report.
<b>HOLIDAYS</b>	This module is used to add or remove your holidays to ensure a delivery is not made on the days you are not open
<b>HELP</b>	This module is used to obtain help in using the EDC Website
<b>QUIT</b>	This module is used to quit out of the system (it will take you back to the log-in screen at the very beginning)

## HOW TO SEARCH FOR A FILE OR BOX

### Searching for a box

- 1 Click on the **Inventory** tab.
- 2 Select one of the below search types in the drop down field:  
**Box- Number** | **Box- Description** | **Box- Bar code** | **Box- RC number** | **Box- Field 1**
- 3 Enter the exact box number into the search bar. Press *Enter* or click on the **Search** button.
- 4 The search results appear at the left of the window.

### Searching for a file

- 1 Click on the **Inventory** tab.
- 2 Select one of the below search types in the drop down field:  
**File- Number** | **File- File Description** | **File- Bar code** | **File- RC number** | **File- Field 1**
- 3 Enter the exact file number or file name into the search bar. Press *Enter* or click on the **Search** button.
- 4 The search results appear at the left of the window.

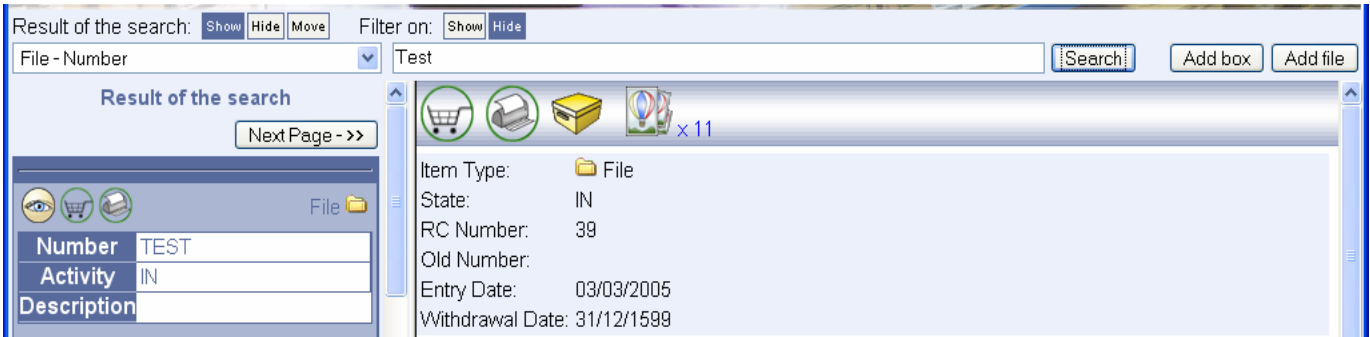
### Performing a full text search

- 1 Click on the **Inventory** tab.
- 2 Select one of the below search types in the drop down field:  
**Full Text Search- Find all words** | **Full Text Search- Find any of these words** | **Full Text Search- Boolean expression**
- 3 Enter the file name or number into the search bar. Press *Enter* or click on the **Search** button.
- 4 The search results appear at the left of the window.

The screenshot illustrates the search process in the software. At the top, the 'Inventory' tab is selected. The search bar contains the text 'Test', and the search type is set to 'File-Number'. The search results are displayed in a table on the left, with the first result being 'TEST'. The main pane shows the details for this file, including its item type (File), state (IN), RC number (39), and entry date (03/03/2005). The interface also includes a 'RESULTS' label pointing to the search results table and three callout boxes labeled 'Step 1', 'Step 2', and 'Step 3' pointing to the 'Inventory' tab, the search bar, and the search button respectively.

## HOW TO VIEW OR EDIT A BOX

1. Click on the correct box that appeared after your search.
2. On the right, a screen will appear with the boxes details.



3. To add any new information or edit the existing information to the box:  
Delete the existing information and enter the update information or use the drop down box to change the department and disposal date
4. To change or add to the notes field, click on the *notes* button and type in any changes desired
5. Click on the *Update* button. The information is now changed

### BELOW IS A SMALL DESCRIPTION OF THE FEILDS YOU WILL SEE

#### RC number

Unique read-only numeric field.

This field indicates the number automatically attributed to a box or a file. It is used internally by the system for tracking purposes.

#### Number

Required alphanumeric field containing a maximum of 20 alphanumeric characters.

This field contains the number assigned to the box or the file. Please do not change the box number once the barcodes have been printed.

#### Owner

This field indicates to whom the box or the file belongs to and is strictly for internal use for the customer.

#### Department

Required drop-down

This field indicates to which department and sub-department a box or file belongs to.

#### Description

This field contains the description of the document.

#### Start date / End date

These fields are used to specify the start and the end dates of a box or a file.

#### Disposal

There are three fields related to disposal:

FIRST - "CONFIDENTIAL",

SECOND – Place date of destruction

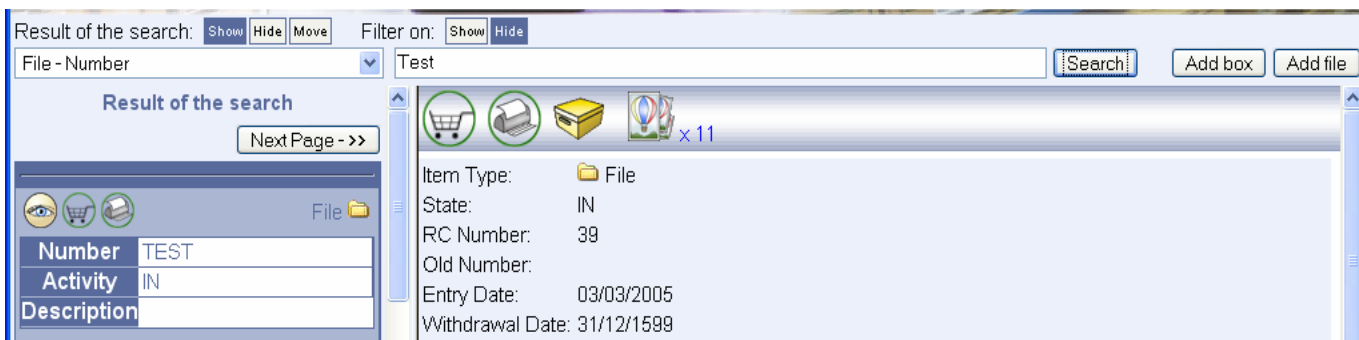
THIRD - "FIXED"

#### Notes

This is where you will place the contents of the box – Click on the Plus symbol to open.

## HOW TO VIEW OR EDIT A FILE

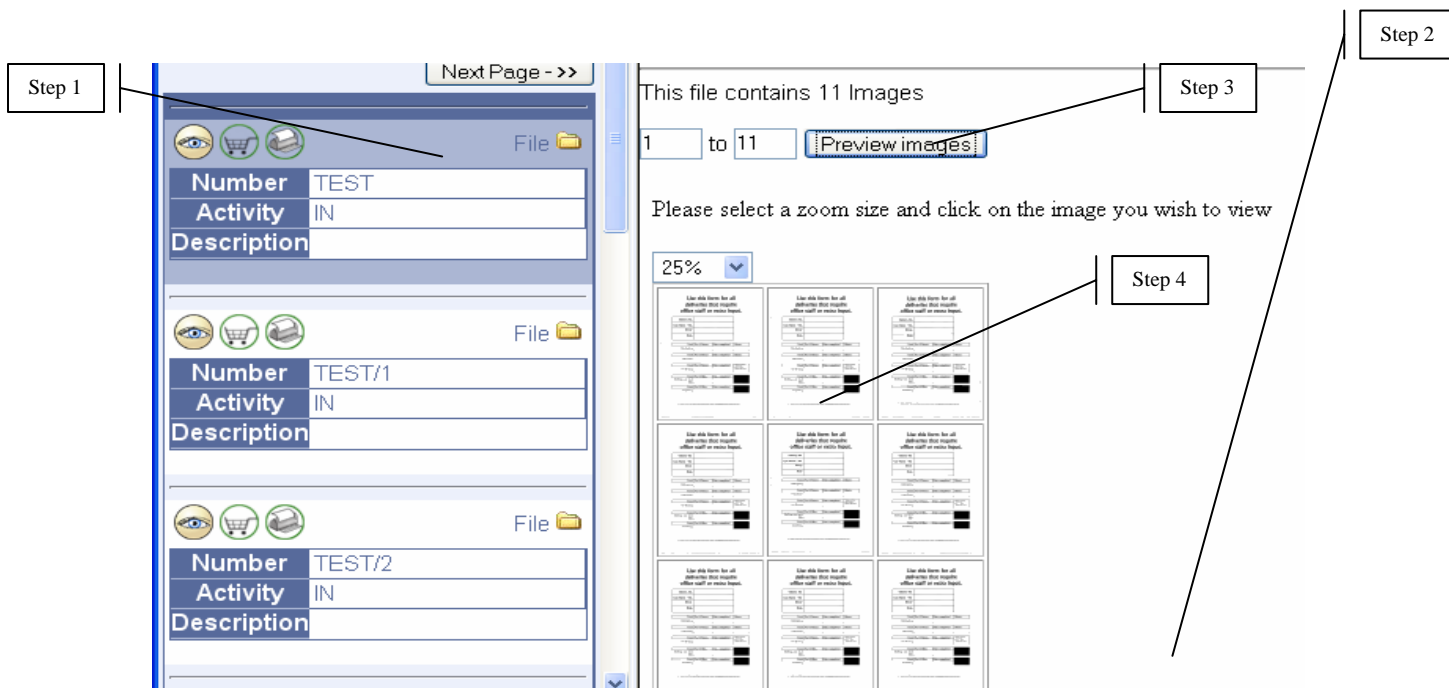
1. Click on the correct file that appeared after your search.
2. On the right a screen will appear with the file details.



3. To add any new information or edit the existing information to a file:  
Delete the existing information and enter the update information or use the drop down box to change the department and disposal date
4. To change or add to the notes field, click on the *notes* button and type in any changes desired
5. Click on the *Update* button. The information is now changed

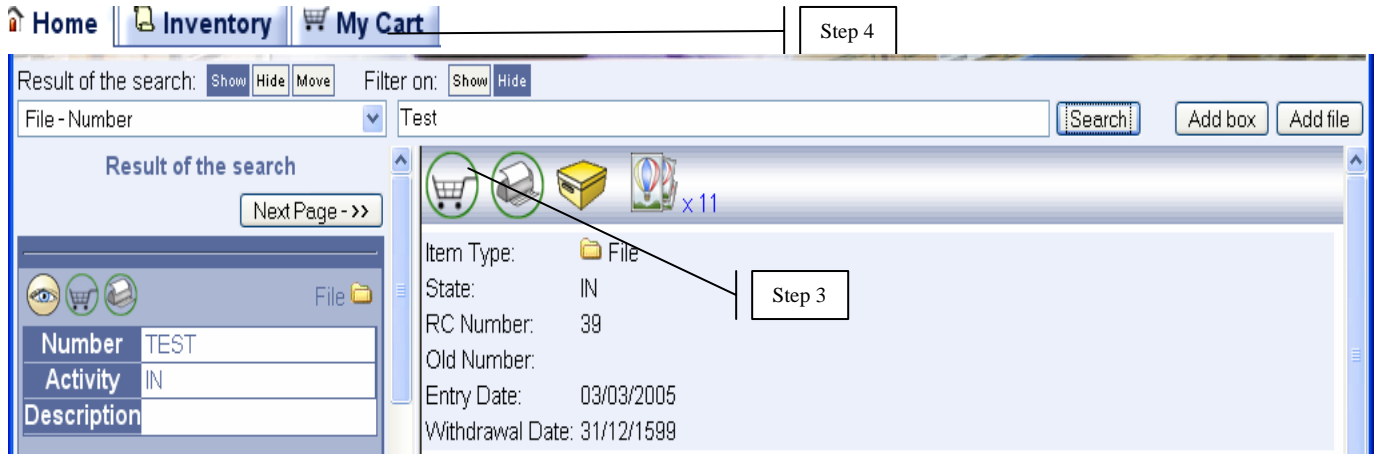
## HOW TO VIEW A FILE IMAGE

1. Click on the correct file that appeared after your search.
2. On the right a screen will appear with the file details. Scroll down the page till you reach the end.
3. In the Empty Boxes enter the images you would like to see e.g 1 to 11. Click on Preview images
4. Thumbnails of the images will load. In order to view the image at full size double click the thumbnail.



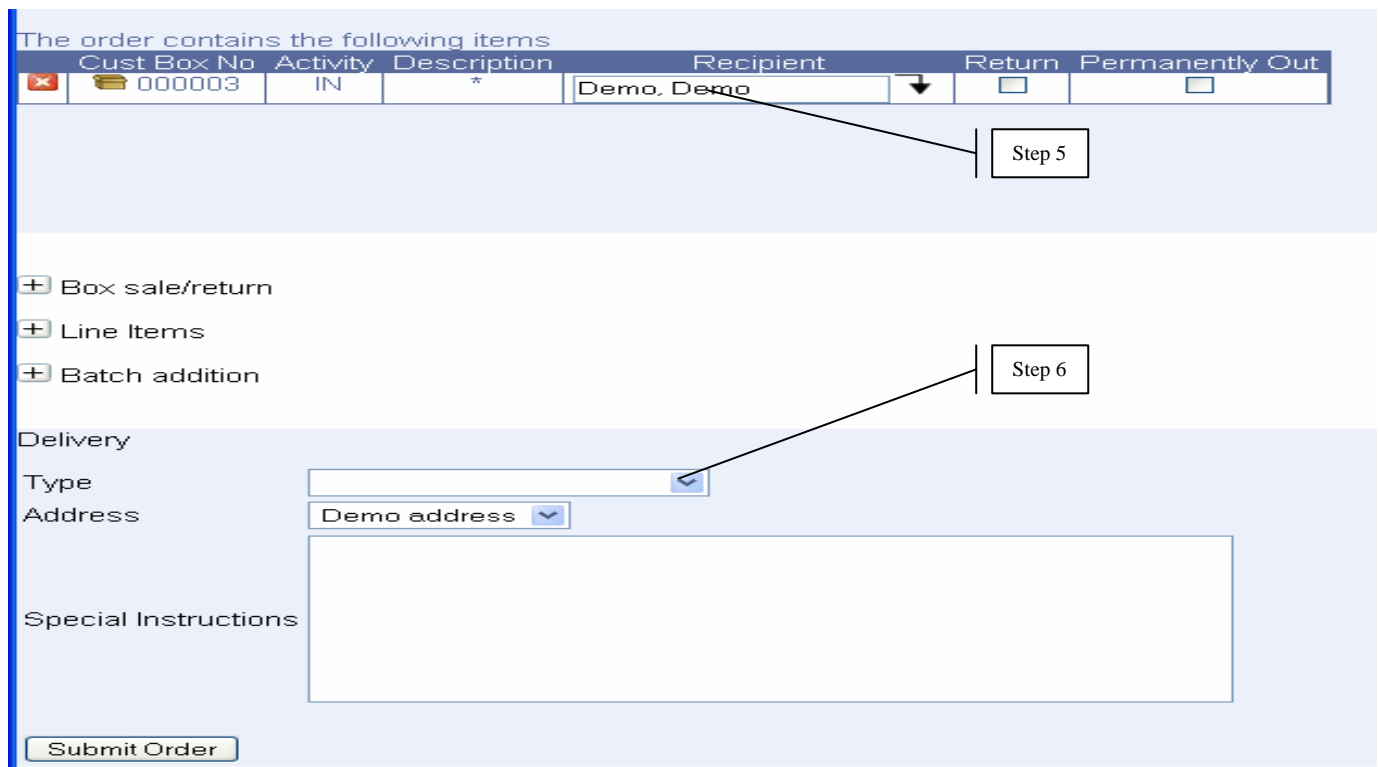
## HOW TO PLACE A FILE / BOX ORDER

1. Click on the correct file that appeared after your search.
3. On the right a screen will appear with the file details.



3. To add this box to the orders list you need to click the shopping trolley icon. A box will appear in the trolley.
4. Once you have selected all the items you were after. Click on the My Cart tab.
5. A List of the items you need will appear. Enter the recipient, who the box is being delivered to. To remove the box or file from the *Order Items menu*, click on the red close button on the left of the unwanted items.
6. To submit the order, select a delivery type and delivery address. If you have any special instructions for the delivery driver, please enter them in the space provided  
Click on the *Submit Order* button

A confirmation screen will appear with the details of your order. An order number will also be provided. Please record this number as a reference.



## HOW TO PLACE A LINE ITEMS ORDER

Click on the My Cart tab.

### TO ORDER BOX PICKUPS

1. Enter amount of boxes or files to be returned to Advance Record Management
2. Click the Add Box Return Button

### TO ORDER EMPTY BOXES

1. Enter amount of boxes you would like to purchase
2. Click the Add box sales Button

### TO ORDER A LINE ITEM

1. Click the drop down menu
2. Select the item you would like e.g. shredding bin pick up.
3. Click the Add Button
4. Select Delivery type
5. Select delivery address.
6. If you have any special instructions for the delivery driver, please enter them in the space provided
7. Click on the *Submit Order* button

A confirmation screen will appear with the details of your order. An order number will also be provided. Please record this number as a reference.

The screenshot shows the 'My Cart' interface with the following sections and annotations:

- Box sale/return:**
  - Box return:** Quantity input field (Step 1), Add Box return button (Step 2).
  - Box Sale:** Quantity input field (Step 1), Add Box Sale button (Step 2).
- Line Items:**
  - Item selection dropdown: ARCHIVE BOX CHANGE(BOX & LABOUR) (Step 1).
  - Quantity input field (Step 2).
  - Add button (Step 3).
- Delivery:**
  - Type dropdown (Step 4).
  - Address dropdown: Demo address (Step 5).
- Special Instructions:**
  - Text input area (Step 6).
- Submit Order:** Button (Step 7).

## How to create a report

1. Click on the Report tab
2. Click on the TYPE drop down menu and select the Report Type.
3. Click on the TEMPLATE drop down menu and select Standard - this will give you the most common fields
4. Add any extra fields you would like to see on your report. To do this select the field and click the >| button it will then move the field to the selected column.
5. Click on the SORT Drop down menu and select the order you would like to view the report in
6. To add a filter, select the field it will restrict in the drop-down list. Select a type of boolean operator .Enter a value in the blank field and click the ADD button at the right of the fields. To remove a filter, click on the 'x' sign at it's right to remove it from the list.
7. Click the CREATE

The screenshot shows a software interface for creating reports. At the top is a navigation bar with tabs: Home, Inventory, My Cart, Labels, Report, Holidays, User, Help, and Quit. Below the navigation bar is a banner image. The main interface is divided into several sections:

- Step 1:** Points to the 'Report' tab in the navigation bar.
- Step 2:** Points to the 'Type' dropdown menu, which is currently set to 'File report'.
- Step 3:** Points to the 'Template' dropdown menu, which is currently set to 'STANDARD'.
- Step 4:** Points to the '>|' button in the 'Report Fields' section, used to move fields from the 'Not selected' column to the 'Selected' column.
- Step 5:** Points to the 'Sort...' dropdown menu, which is currently set to 'By Number'.
- Step 6:** Points to the 'Add' button in the 'Filter on...' section, which is used to add a filter to the report.
- Step 7:** Points to the 'Create' button at the bottom of the interface.

The 'Report Fields' section contains two columns: 'Not selected' and 'Selected'. The 'Not selected' column lists fields such as RC Number, Withdrawal, Disposal, Entry Date, Access Level, Source, Owner, and Old Number. The 'Selected' column lists fields such as Number, Description, Activity, Department, Type, Start Date, and End Date. The 'Filter on...' section has a table with columns for Field, Type, and Value, and an 'Add' button.

## NEED HELP ?

Click on the **HELP** icon. This is where you can get assistance in using EDCWeb if required.

If this does not help you with what you are wanting to do, please contact A.R.M on 03 5274 2000.

## How to logout of ARM website

Click on the **QUIT** icon to exit and return to the log-in screen. It is very important that all sessions are terminated with a logout. There is a Log-out/Quit button located at the top right of every page. This is important for two reasons :

Without a log-out, the unattended session is an opportunity for an unauthorised user to access the system.

2. As there is generally only the one website licence issued, if you do not log out/quit, others in your company will be unable to access the website for around 10 to 15 minutes. The website can only be accessed by one user at any one time.