EdiSoft 4

The Exporters Companion

Users Manual

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1 Introduction

1.1 Getting Started

Disclaimer: Please be aware that Woodwind Systems do not accept any responsibility for error contained in this guide or for any loss of user business, either financial or otherwise, whilst using the *EdiSoft* product. It should also be noted that this manual is a guide only and relates to the actual use of the software. For REX's from NEXDOC it is assumed, and indeed imperative, that the reader has a detailed knowledge of the **DAWR Export Operations manual** as it relates to the legislative requirements for export.

All efforts are made to see that this guide is correct. There may be times when there are discrepancies due to enhancements or changes to the program. If this is important to you then please help us by advising the Help Desk by email and we will make any necessary corrections.

There are four levels of first hand support as follows:

***EdiSoft* Help Desk**	Kate on	E-Mail helpdesk@edisoft.com.au Mob 0421 379 465
DAWR/NEXDOC Error Messages	NEXDOC Support	Tel 1800 900 090 - General Enquiries Tel (02) 6272 4800 - Meat Tel (02) 6272 4700 - Non Meat Fax (02) 6272 5773
Customs ICS Help Desk		Tel 1300 558 099

Hint Use of the Help Desk email address in most instances, is by far the most effective way of obtaining assistance. Please document your query with as much information as possible and include examples where available.

The importance of a stable platform.

With most of the things we do it is important that we operate from a stable foundation or platform.

This rule is most applicable to the application software running on your computer. If the computer is unreliable, or the operating system (Windows) is unreliable then you can be sure the application software will give unpredictable results.

There are some things we can do to maximise the probability of a stable platform.

Always shut down Windows before turning the computer off. This is not always practical because there will be instances where there is a power failure or Windows just hangs etc.

Install an Uninterrupted Power Supply (UPS) unit. This will provide protection from power surges etc. and will also provide sufficient battery backup to enable you to shut down gracefully when there is a power failure.

Run "ScanDisk" regularly. This program detects errors on your hard disk caused by a hardware malfunction and attempts to correct them. If you are continually finding disk errors then this could point to a more serious problem with the hardware and you can take action.

Backup your data regularly. This will enable you to recover if you do have a malfunction or disaster. This issue is discussed more fully later in this manual.

Use Virus protection software. Unfortunately there are some clever people around who take delight in distributing "viruses". These viruses embed themselves in normal programs and proliferate when the infected program is run. Most virus protection software will recognise most viruses and warn you. Unfortunately new viruses are arriving all the time and the protection software needs to be continually updated. It is a real pity that the creators of the viruses cannot find a better way to use their talents.

EdiSoft - the Exporter's Companion

There are two editions of ***EdiSoft.*** There is the "Standard" edition for Exporters who only need to get EDN's from Customs and send PRA's to the Terminals. Then there is the "Premium" edition that accesses ICS , NEXDOC and Sends PRA's to the Terminals. Both editions provide a Data Transfer facility,

This manual covers both the "Standard" and "Premium" editions. Users of the "Standard" edition should disregard the areas that are not available in their edition.

When changing from a previous system.

Please note that any EDN's or PR A's that you have started on your previous system must be completed on that system. Any outstanding REX's can be brought into ***EdiSoft*** by doing a "Reload REX from NEXDOC" using the REX Numbers. During the interim period, make sure that you do not transmit or receive REXs, PRAs or EDNs from one system if you are waiting for replies to transmissions sent from the other system.

Please remember this is your system. We welcome constructive feedback regarding ways the system can be improved.

1.2 Installation

To Install EdiSoft for the first time, please follow the below steps. (you may require your IT department for assistance)

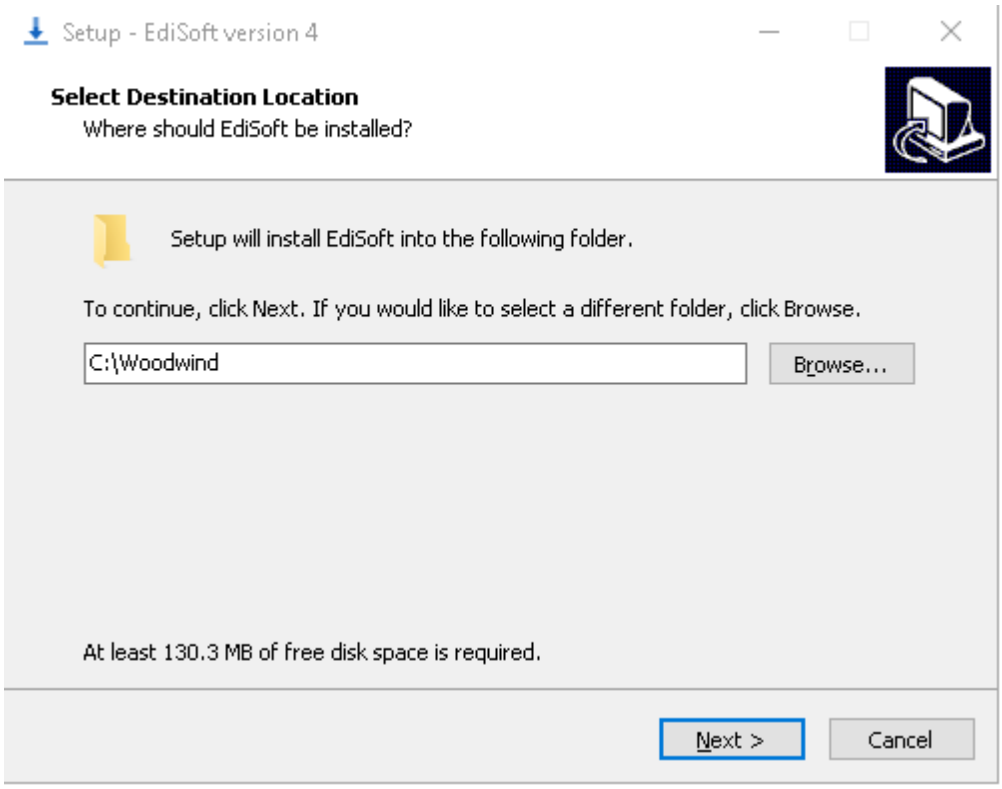
Notes:
- You should only require to do this once even if you will be using EdiSoft with multiple users. (more on this below)
- If you are Installing EdiSoft 4 where there is an existing EdiSoft 3 installation, it is preferable to do a completely new installation so the common files are kept separate. Eventually, EdiSoft 3 will be replaced completely as the full implementation of NEXDOC rolls out. The other functions (EDNs and PRAs will also be converted).

1) You will be sent an email containing a link to a website and an installation password that you will need when you execute the install file. Click on the link and save this installation file to a location on your computer that you will remember

2) Run the file (you will need to be an 'administrator' of the computer/server that you are installing EdiSoft onto)

3) You will be prompted to enter a password for the installation, if we have not provided the password to you please contact us at helpdesk@edisoft.com.au

4) Choose a desired location for EdiSoft. It is important that this is not in a directory with special permissions such as the 'Program Files' directories. Make sure there is no conflict with any existing EdiSoft 3 directory. We would suggest the C:\EdiSoft4 or \\server\EdiSoft4 drive as per the below:



5) Follow the remainder of the steps and EdiSoft 4 software should then be installed onto your system.

Multi-User Setup

After using the above steps to install EdiSoft onto your server (or designated computer to host the EdiSoft database), you then will need to follow below steps to get other computers setup.

1) Firstly, on the server or designated computer, navigate to where EdiSoft was installed and configure the directory as a 'shared network folder' (giving everyone 'full control' to all folders and subfolders in the directory)

2) As well as setting up the shared permissions, you may also need to configure the security permissions as well. (found in 'properties' -> 'security' tab)

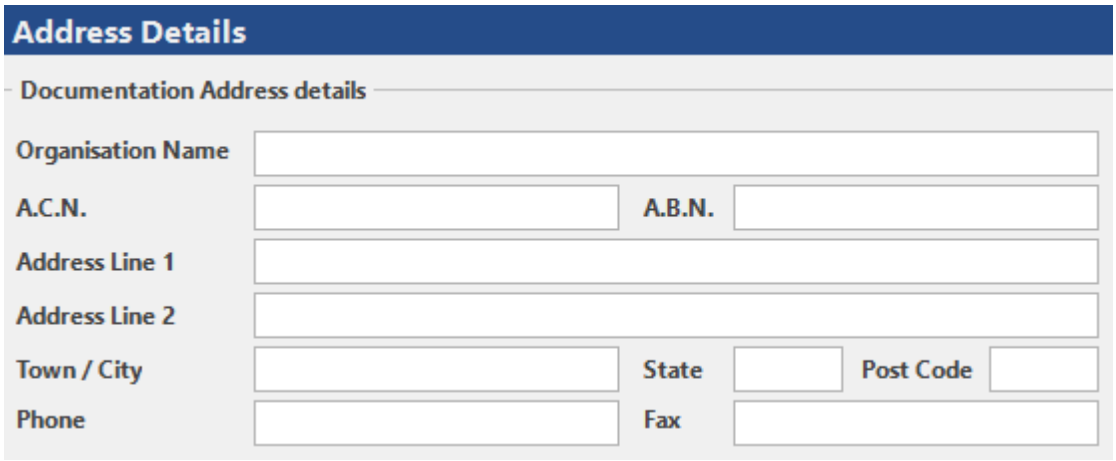
3) Then, on the computers/user accounts that need access to EdiSoft, navigate to the 'shared network folder' that was setup in step 1.

4) Find and run a file in the directory that should be called 'LocalInstall.exe'. This should create the desktop icon and registry entries that EdiSoft 4 requires to run.

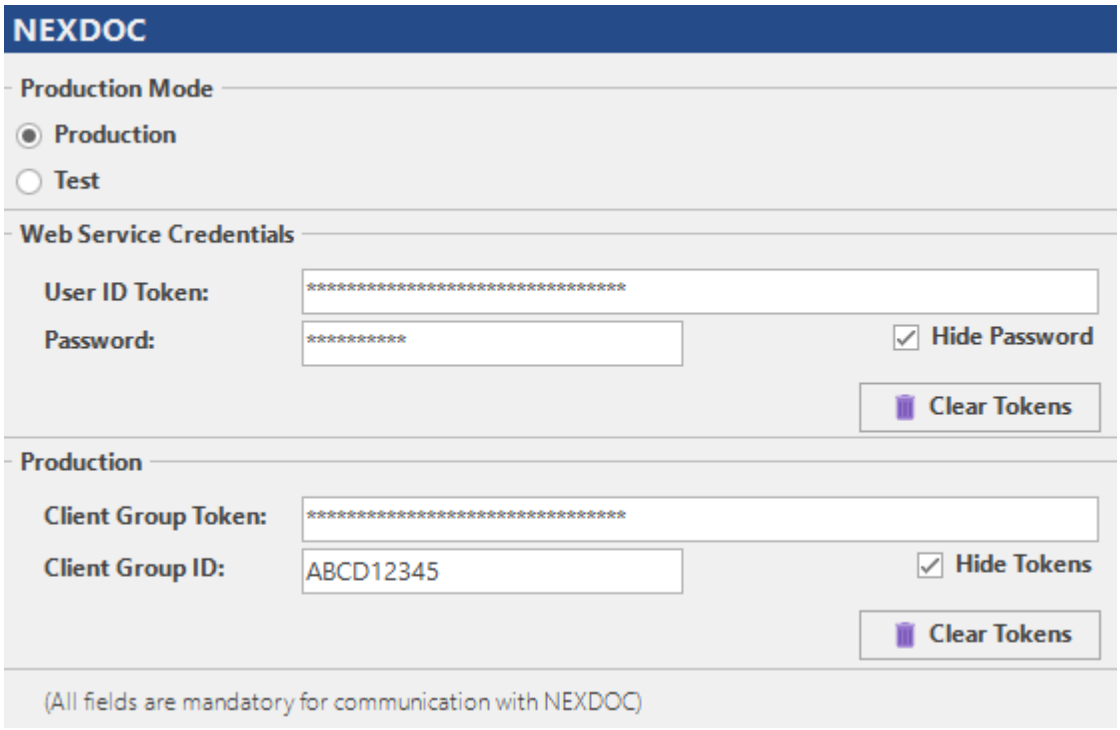
If you have any questions regarding this process, you can contact helpdesk@edisoft.com.au for assistance.

First time running EdiSoft 4

The first thing you will see is a screen prompting you to enter your details.

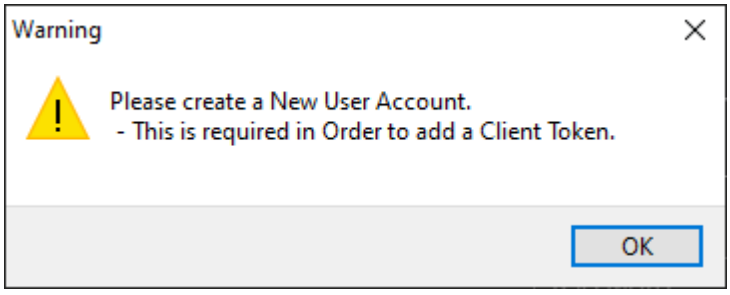


Enter the details for your organisation and then navigate to the 'NEXDOC' tab.

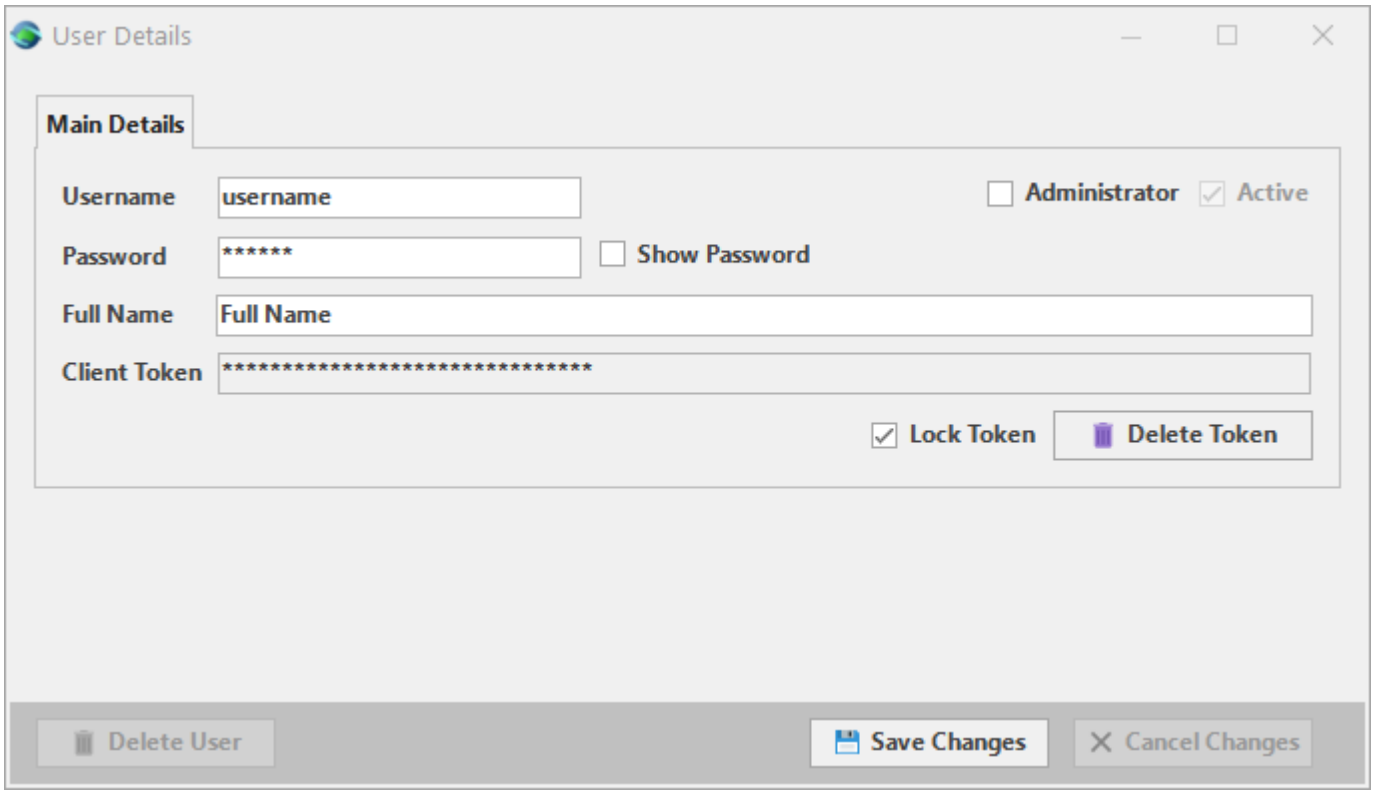


In the 'NEXDOC' tab of this form, you can then need to enter your Client Group ID and Token. If you do not have this information yet, click OK regardless. (You can enter this information later) You will need to enter this information before being able to transmit and receive with NEXDOC. We recommend checking out the following NEXDOC Group ID and Tokens section of this manual for information on this.

You may then get prompted with the below:



To resolve this warning, you will need to create a new user account. (these details will be require when you open EdiSoft)

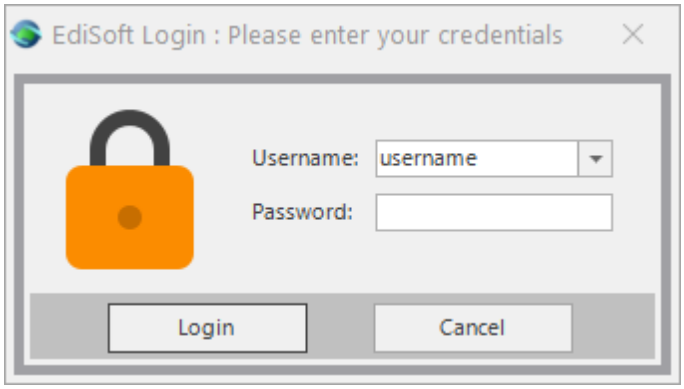


If you have a Client Token from NEXDOC you should also enter it in before saving. Please see the NEXDOC Group ID and Tokens section for information on this.

If you will have multiple users (and/or Client Tokens) to setup, we suggest checking out the Users section to see more advanced options.

Once you have created your required user accounts, close the User List Form and EdiSoft will create the data files.

Once complete, login using one of the accounts you just created and you should have access to EdiSoft 4.



After configuring EdiSoft with your NEXDOC Group ID, Tokens and Web Service Credentials, it is recommended to run an Update Codeset to receive the latest REX selection data from NEXDOC. This is also a good test to see if your Tokens are configured correctly in EdiSoft.

Test Database

If you would like to setup an additional database for creating and sending test REX's, we recommend to use the Databases / Client Group options in EdiSoft.

1.3 Adding a Workstation

To enable another computer to use EdiSoft the process is quite simple.

On the Workstations

1. Using File Explorer, locate and navigate to the EdiSoft4 shared directory on the server.
2. Run the 'LocalInstall.exe' file
3. After the setup process has finished you should have a desktop icon to run Edisoft 4.

1.4 Registering With NEXDOC

To send and receive REX's through EdiSoft, you will need to register for NEXDOC. To do this, please try following the below steps.

If you have any problems registering, please contact nexdoc@agriculture.gov.au for assistance.

1) Open the following link - https://online.agriculture.gov.au/portal/#/

2) Click Create Account. (Alternatively, if you have an AusKey for your ABN you can sign in with this)

3) Follow the 'Create Account' process until you have an Agriculture account.

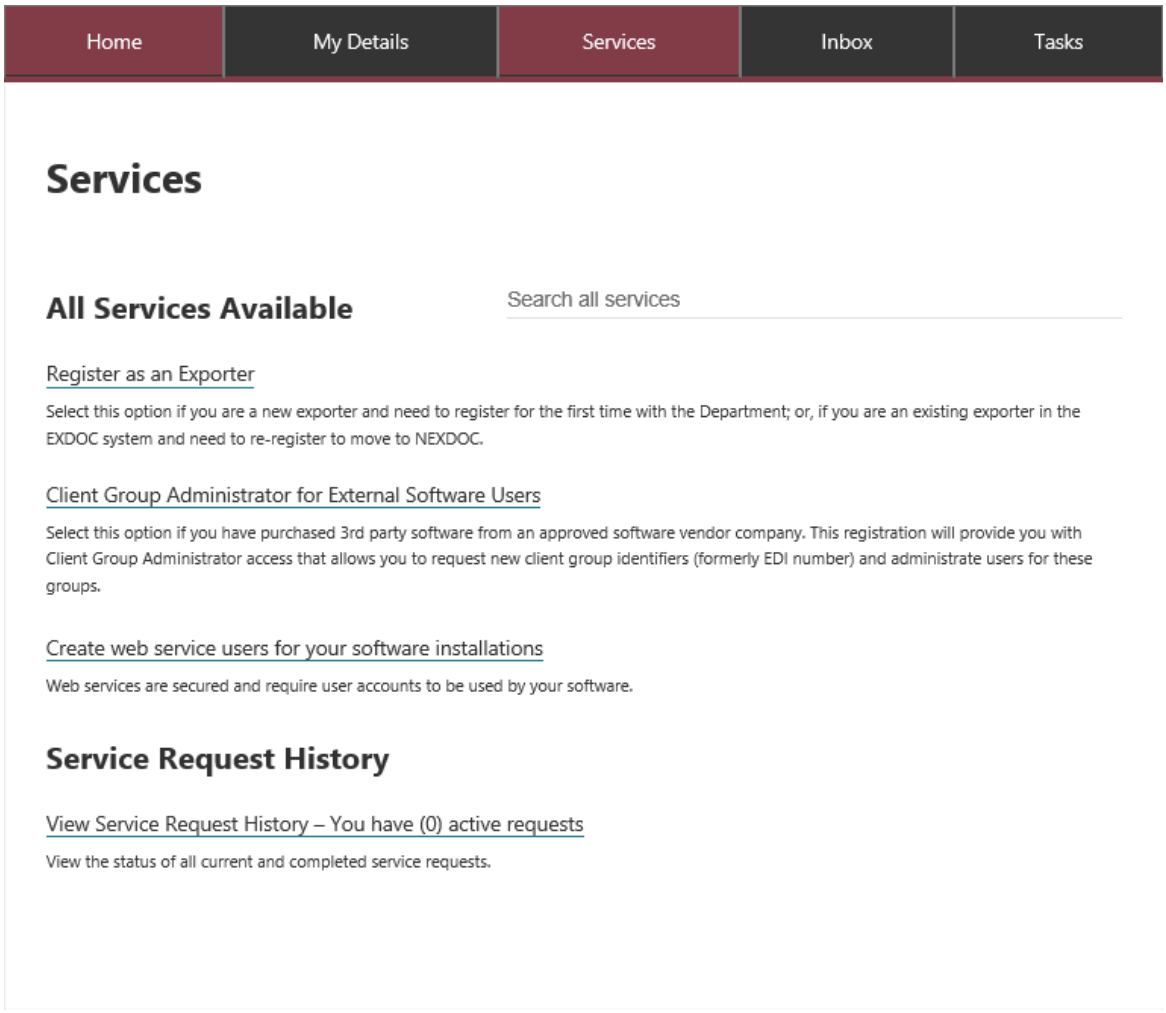
4) When logged in, navigate to the 'services' tab and apply for the following services you require.

If you are an Agent or Freight Forwarder, you will need to apply for the following services:

- Client Group Administrator for External Software Users
- Create web service users for your software installations (you will be asked to create a password for this step, please remember this as it will need to be entered into EdiSoft)

If you are an Exporter, you will need to apply for the following services:

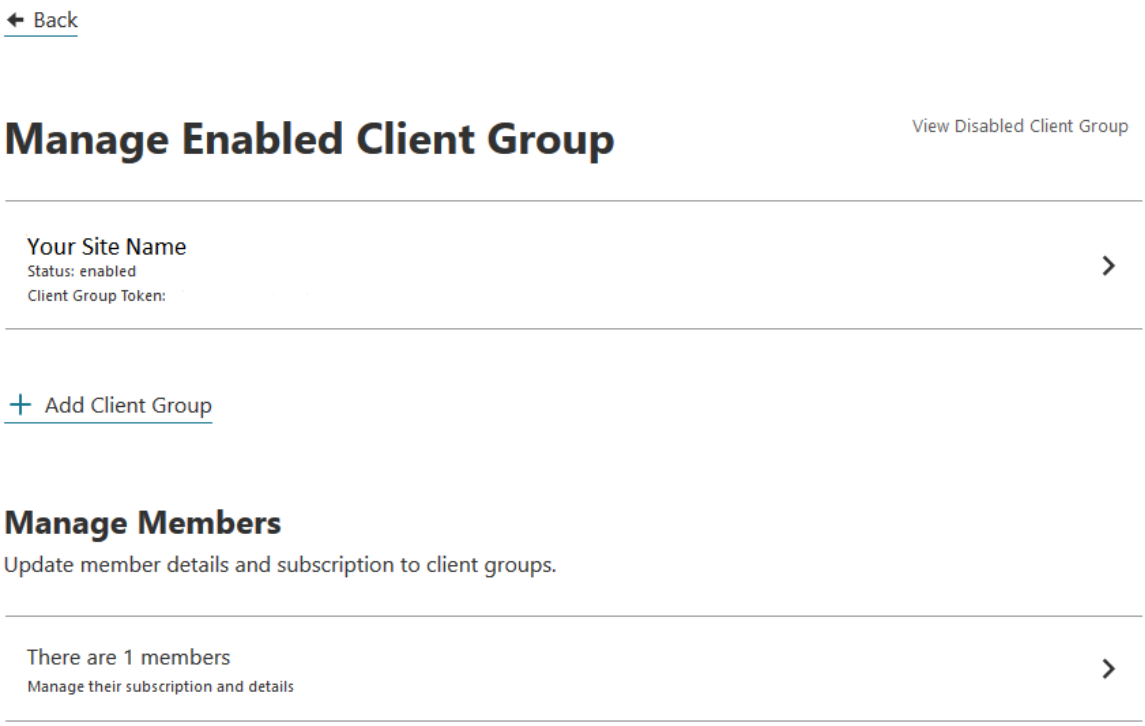
- Register as an Exporter
- Client Group Administrator for External Software Users
- Create web service users for your software installations (you will be asked to create a password for this step, please remember this as it will need to be entered into EdiSoft)



5) Once you have successfully applied for these services, navigate again to the 'Services' page on the NEXDOC portal

6) Click on 'Manage Client Groups'

Here NEXDOC provide options to add another Client Group (if you have more than one site), or to view your Client Group Token's and Client Group ID's.



The 'Manage Members' option is also necessary to link/add users to your Client Groups, you can view your Client Tokens by viewing a member you select.

Once you have setup your members and client groups on the NEXDOC Portal, you should be ready to configure the NEXDOC Group ID and Tokens into EdiSoft.

1.5 NEXDOC Group ID and Tokens

Why are they necessary?

Previously in EdiSoft 3, RFP's communicated with EXDOC through emails. Emails would get sent and an email would get received during a transmit and receive.

In the new NEXDOC system, EdiSoft 4 and EXDOC communications occur differently, and without using emails. This means any REX that gets transmitted will be received instantly in the same process.

Due to email accounts not being used for this process, NEXDOC are instead using what they call 'tokens' in order to divide transmissions from different Clients apart. You will need to Register with NEXDOC to obtain these tokens.

What are they?

There are 2 different types of 'tokens' and a 'Client Group ID' that NEXDOC will supply each client. We have detailed what each type is below:

Client Group ID:

Example of a Client Group ID: *CGAA01542*

This essentially an EDI user number, it can be giving out to publicly to other Clients so they can use it to forward/transfer

REX's to your system. Likewise, to forward/transfer a REX to another Client you will need their 'Client Group ID' so NEXDOC can redirect the REX to them.

Client Group Token:

Example of a Client Group Token: *2d34353435932313930363232323546*

Unlike the 'Client Group ID', this token should not be giving out. This 'token' is a unique set of characters that each Client has. When sending and receiving REX's, this Token gets sent so that NEXDOC know that you are indeed the Clients with the matching 'Client Group ID'. Essentially, it is like a password for 'Client Group ID's.

Client Token:

Example of a Client Group Token: *cfd5dd56310f4e239a2c1995b005132*

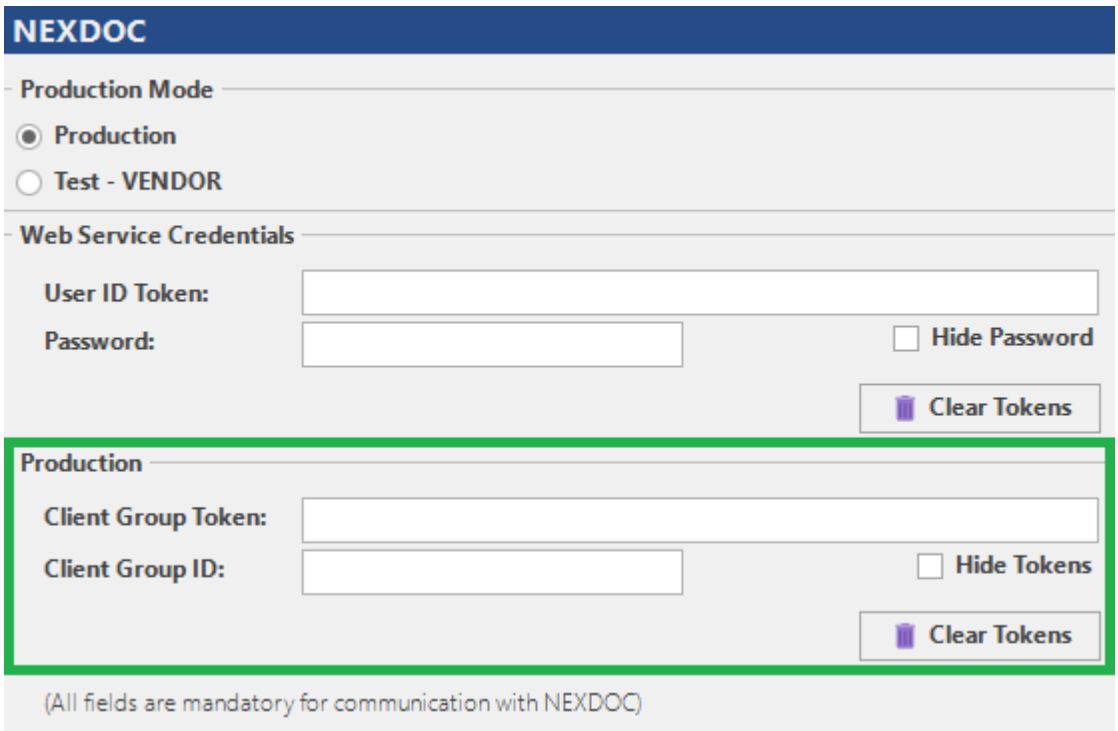
This token is a 'user specific' set of characters that should also not be given out. Unlike EXDOC's previous system, it is now possible to have separate users have different permissions inside the same Client. For example, one user may be AEPI approved, whether another user may not be. 'Client Tokens' are how these different users are distinguished.

When you get the Client Group ID and the Tokens, save these in a secure place. They are important to your security.

Configuring 'Client Group ID' and 'Client Group Tokens' in EdiSoft

1) Navigate in EdiSoft to 'Setup' -> 'NEXDOC'.

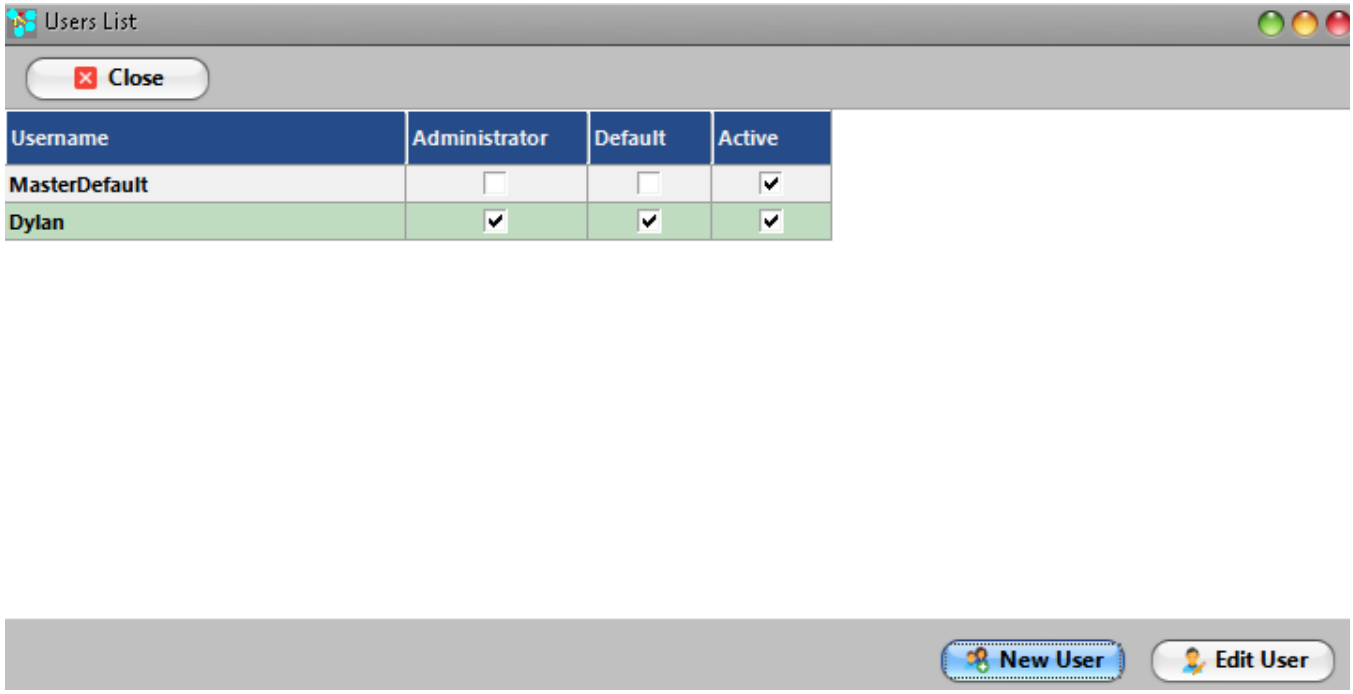
2) You should then be able to enter your 'Client Group ID' and 'Client Group Token' in the respective fields.



3) We also have an option to hide the token so users don't see the actual characters.

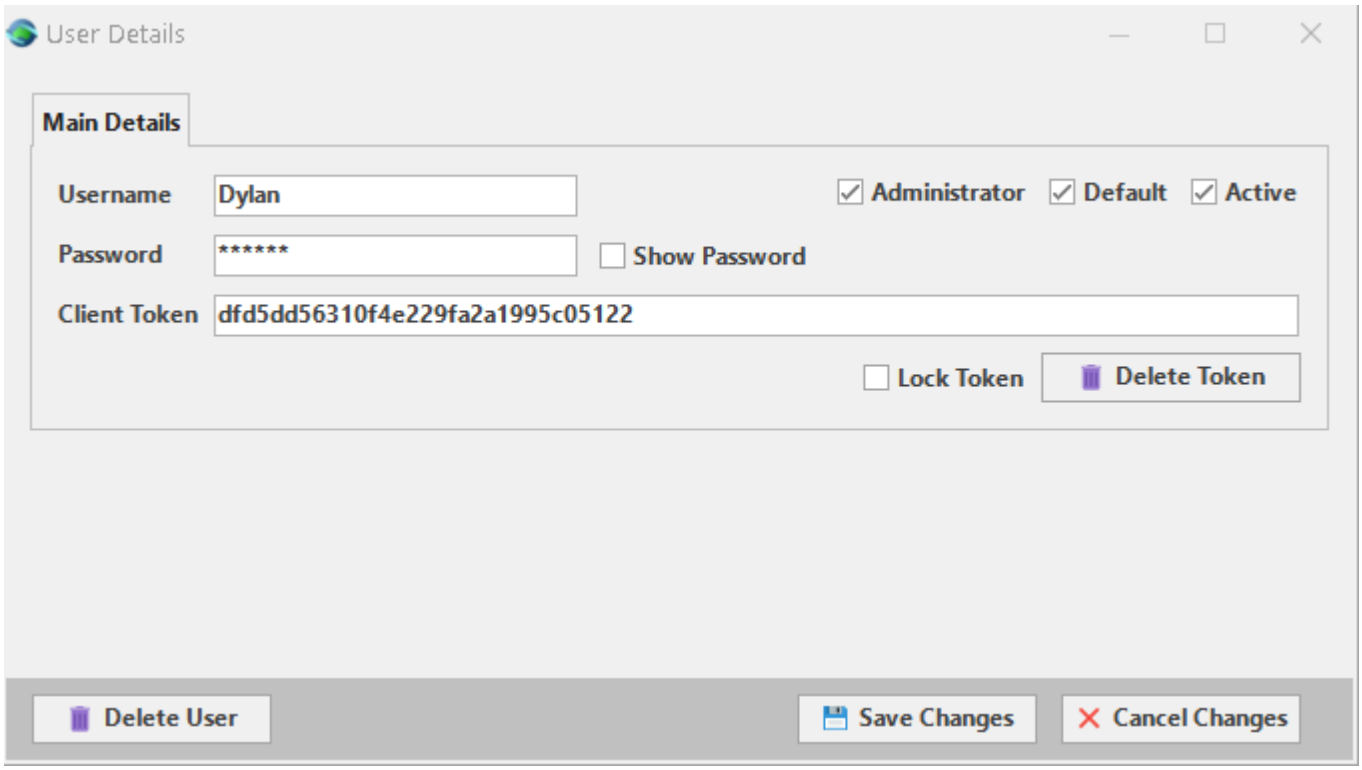
Configuring 'Client Tokens' in EdiSoft

1) Navigate in EdiSoft to ‘Tables’ -> ‘Users’.



2) Select and click ‘Edit User’ for the user you would like to add a ‘Client Token’ to. (or 'New User' if you wish to add one)

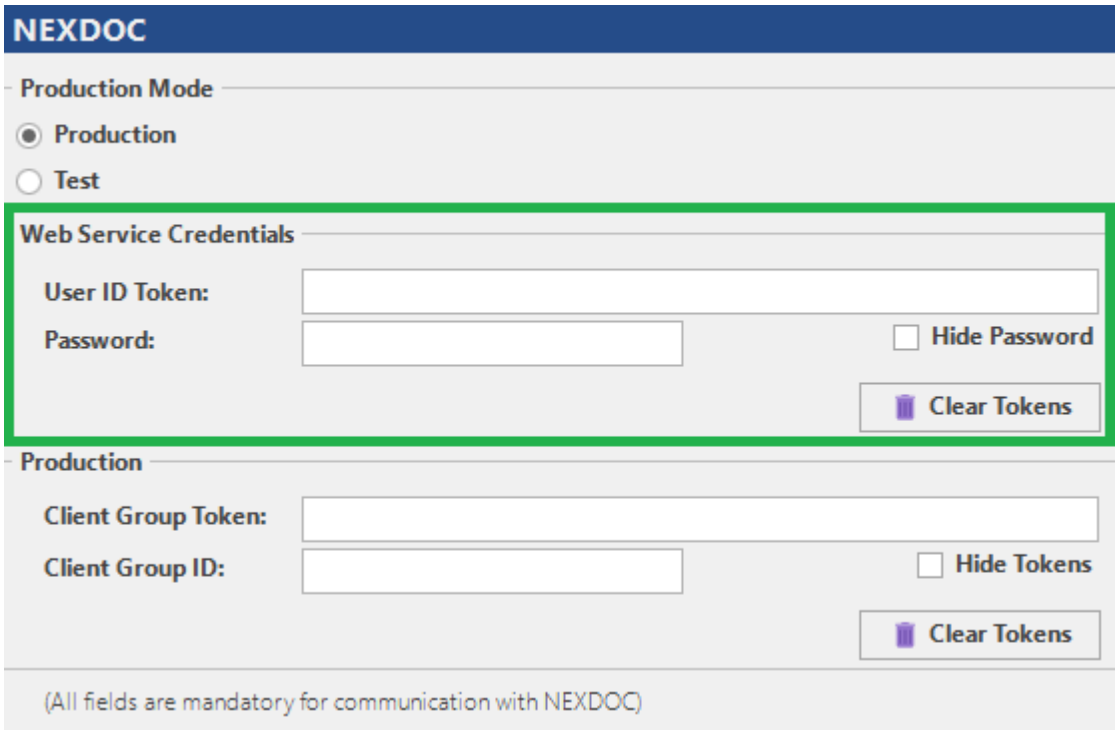
3) You should then be able to enter the ‘Client Token’ into the Client Token textbox



4) Likewise, with the Client Group Token, we have an option to 'Lock' the Client Token so it's not easily viewable without the users password.

Web service credentials

To communicate with NEXDOC you will also need to enter your Web Service Username Token and Password to the below section of EdiSoft:



1.6 Basic Grid Functionality

Whenever you see a 'table' or 'grid' in EdiSoft, there will be some standards that you should familiarize yourself with, as these grids appear in lots of different forms throughout EdiSoft.

Navigation Panel

On each of these grids, you will most likely find the following 'Navigation Panel': (some grids may have more or less options - depending on the features it requires)

This navigation panel can be used to perform various tasks on the grid, such as the following:

Adding and Entering new records

Hotkey on keyboard: ***Insert***

As you may have guessed, click this to add a new record to the grid. If you are in the process of editing a record and you click this (or press *insert* on your keyboard) the current record will also be entered.

Deleting records

Hotkey on keyboard: ***Ctrl + Del***

This function gives you the ability to remove the selected record in the grid. To confirm you would like the record removed, simply click 'OK' to the prompt afterwards to remove it.

Editing records

This is the button to 'edit' the current record selected. In most case this is not required as you can simply click in the field you desire and start typing.

Posting record changes

Hotkey on keyboard: ***Enter***

After entering a new record or modifying an existing one, click this button to post the changes into the table.

Cancel record changes

To cancel adding or modifying a record, use this button

Refresh grid

This button simply refreshes the grid to ensure the most updated data is shown.

Sorting and Filtering

Most grids in EdiSoft can be sorted and filtered specifically in accordance to what you would like to see. Please see the following on how to use this feature.

Sorting records

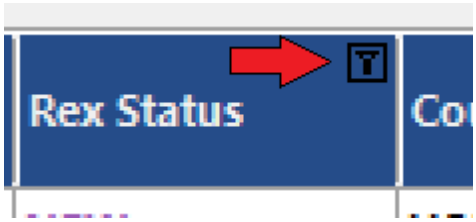
To sort data by a particular column, simply click on the column header

To reverse the sort data, click on the header again to change the order

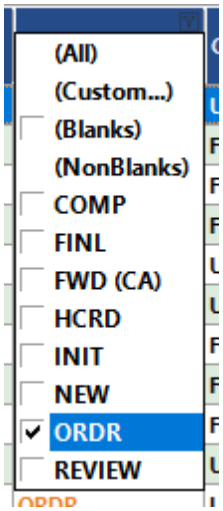
To sort by multiple columns, this is possible by holding ‘shift’ and clicking on your selected columns.

Filtering records

For filtering options, click on the filtering icon on a column of your choice. (you will need to hover your mouse over the header for the button to appear)



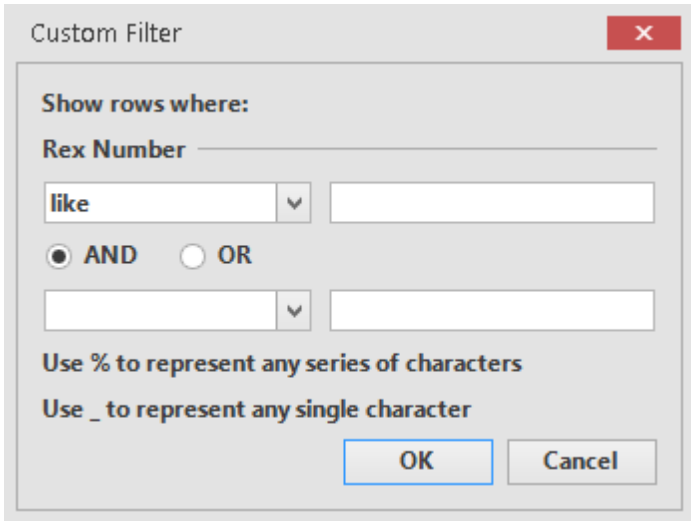
You will then see many filtering options to only show certain REX's. For an example, you could select to only show 'ORDR' REX's:



You should be able to do this to multiple columns to find exact records that you are after.

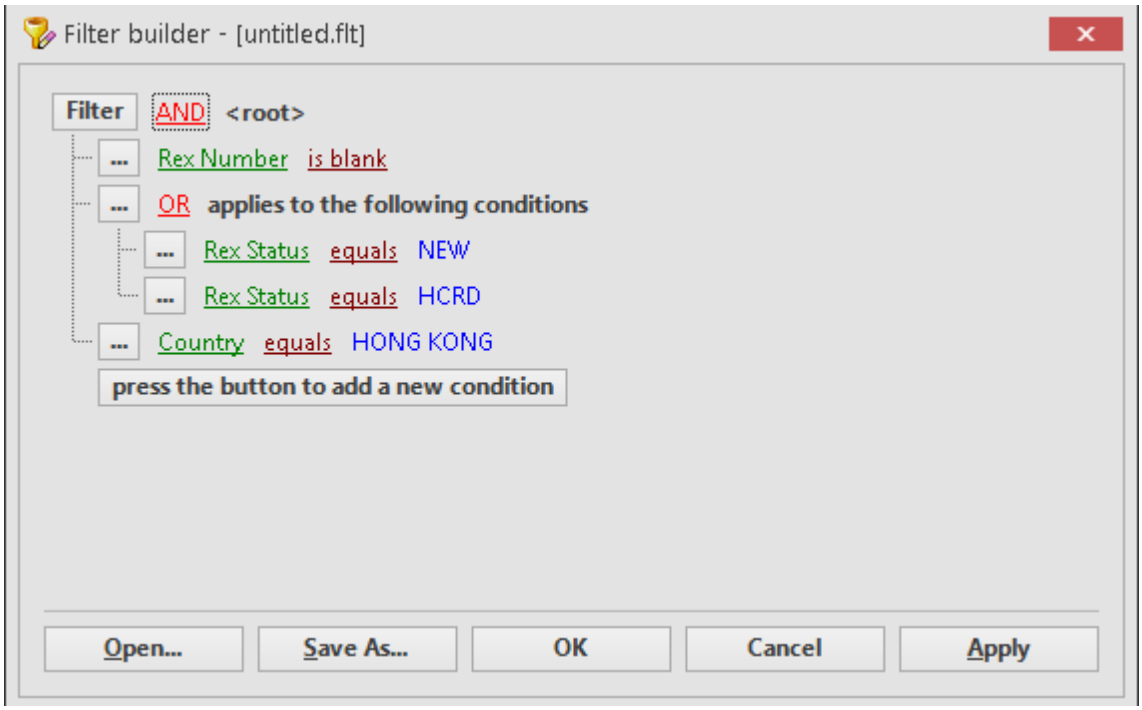
If you wish to clear the filtering you have applied, you can do this by clicking the 'X' button in the footer of the grid: (or 'untick' the filter to temporarily clear it)

For more advanced filtering, try clicking the 'custom' filter – this will then give you even more options:



To easily see what filters you have active you can click the 'Customize...' button in the footer:

This will show the current filters that you have:

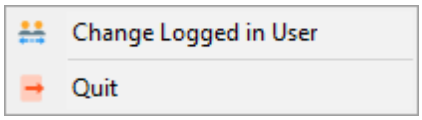


You then have more advanced options if you wish to use them.

Remember, if you can always clear all filters by clicking the 'X' in the footer at the left.

2 Menu

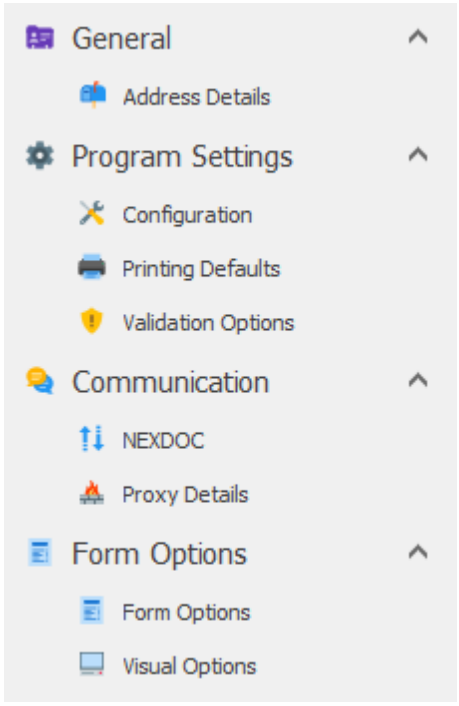
2.1 Program



The **Change Logged in User** option will allow you to login with a different user account.

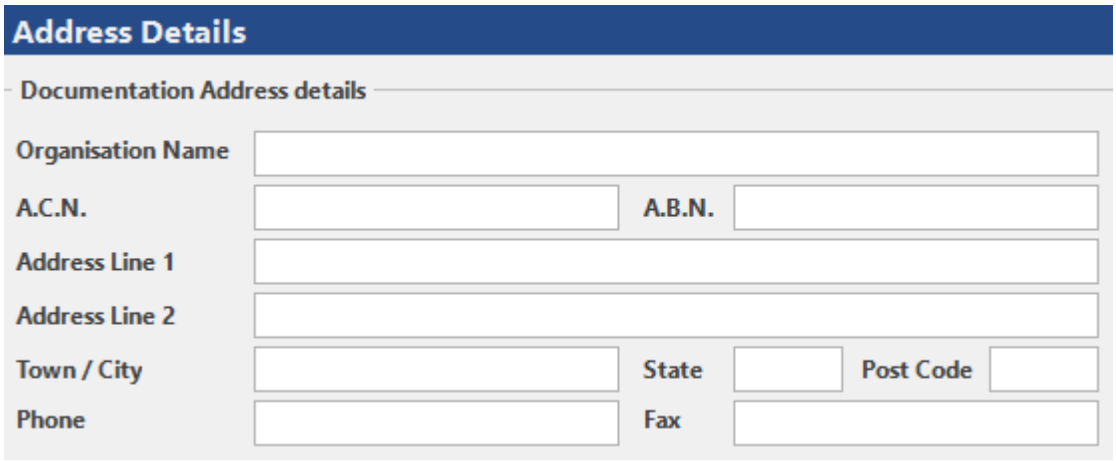
Clicking **Quit** closes EdiSoft.

2.2 Setup



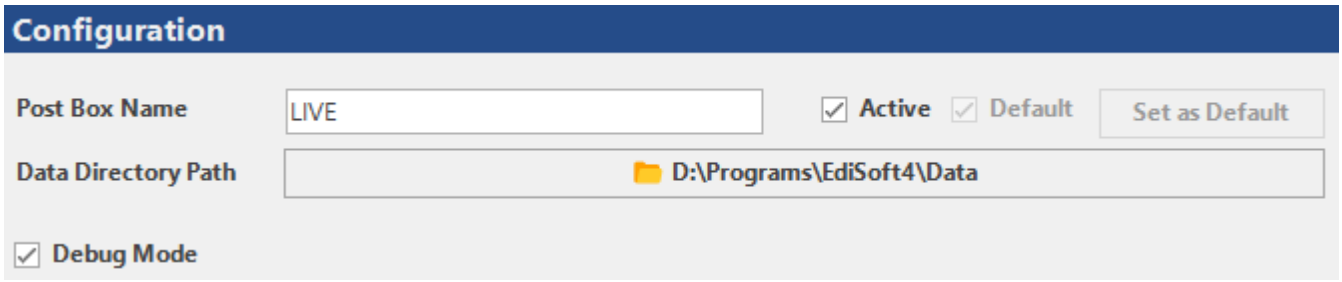
The above options will allow you to navigate to change specific settings in EdiSoft.

2.2.1 Address Details



The details you place in the above text boxes are used in the documentation functions of EdiSoft 4.

2.2.2 Configuration



The **Post Box Name** is used for display only.

The **Active** tickbox is used to specify which Post Box's are visible on the EdiSoft main form.

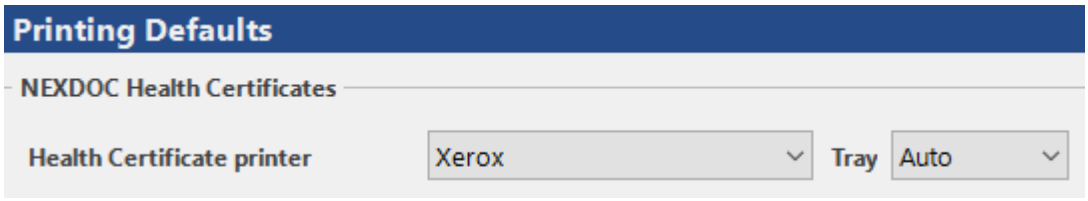
The **Default** tickbox will be ticked for the Post Box that first loads when EdiSoft does. You can use the **Set as Default** when in another Post Box to mark it as the default.

The **Data Directory Path** is set up automatically when you install EdiSoft. If you Create Additional Databases / Client Groups (used if you want multiple companies / identities) then the Location of Data will need to be selected and cannot be the same. (Additional databases are ***not*** required for a multi-user environment) Multiple users can share the same database simultaneously with no changes needing to be made.

You can Swap Between Databases and Client Groups from the EdiSoft main Screen

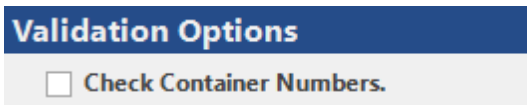
The **Debug Mode** option logs further information that can be helpful for us to diagnose potential issues. You can turn this on here if required.

2.2.3 Printing Defaults



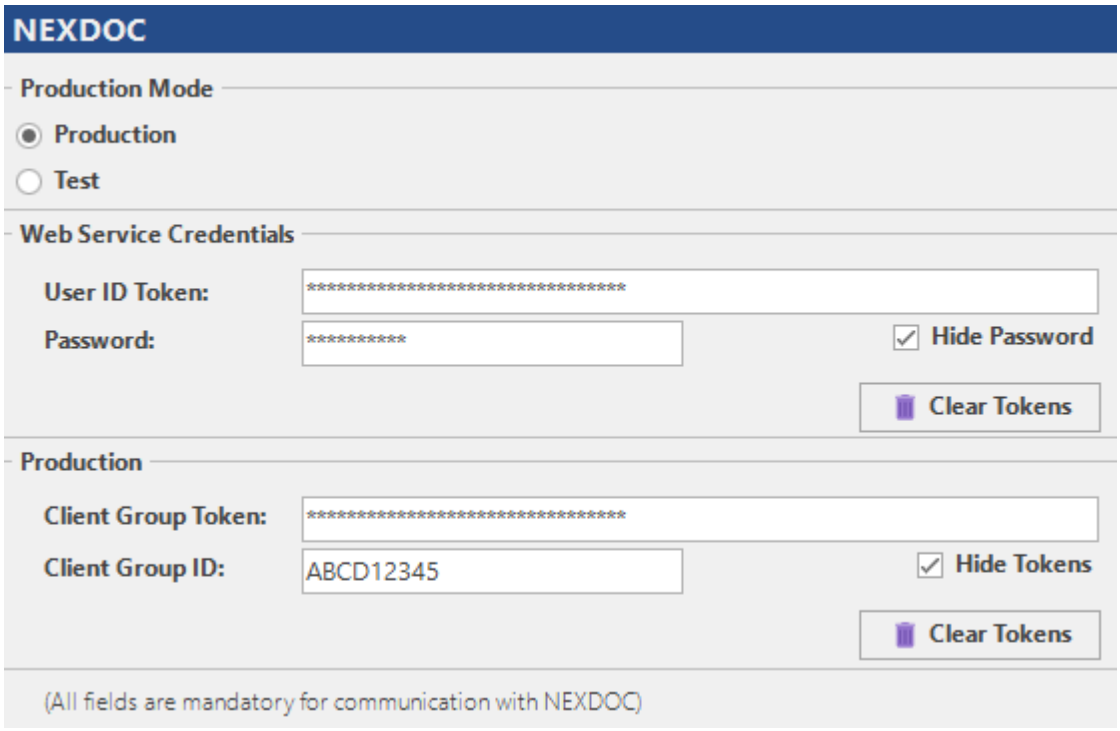
You may select your default Certificate printer using these options.

2.2.4 Validation Options



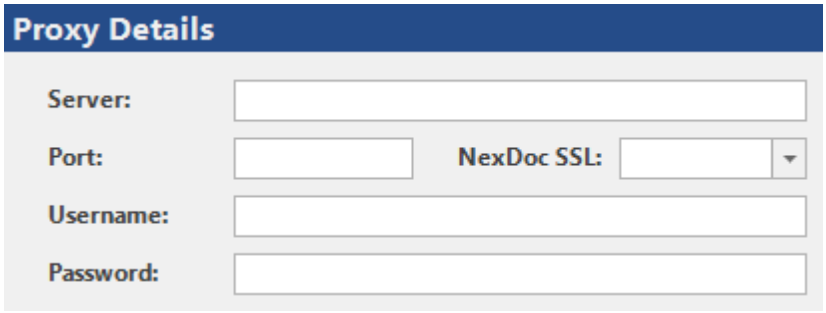
There is a facility to **Check Container Numbers** are valid when entering these. You can turn this on or off here.

2.2.5 NEXDOC



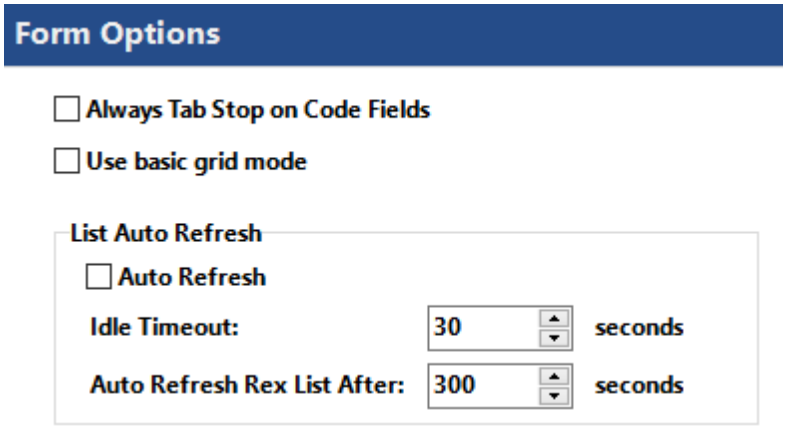
The details in this section are used to communicate with NEXDOC. You will need to Register With NEXDOC to gain this information for your organisation.

2.2.6 Proxy Details



The above are advanced settings that we offer. Your IT should be able to use these to configure EdiSoft to use a proxy server if required.

2.2.7 Form Options



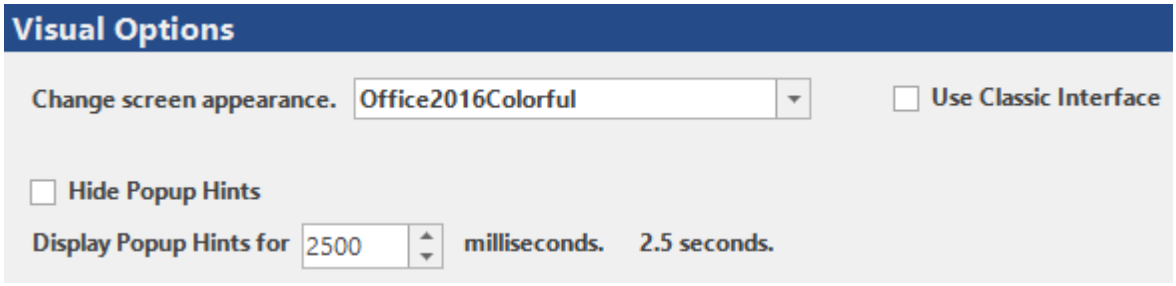
The **Always Tab Stop on Code Fields** is available so that EdiSoft will always tab to the code field when using the Tab key to move between fields.

Use basic grid mode is an option to disable some of the grid features which can help with performance if your database

is very large.

You can also configure **List Auto Refresh** settings so that your computer updates the REX List when changes are made from other computers automatically.

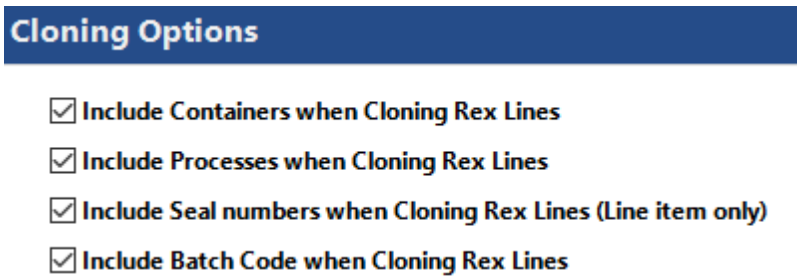
2.2.8 Visual Options



These options allow you to change the EdiSoft look and feel.

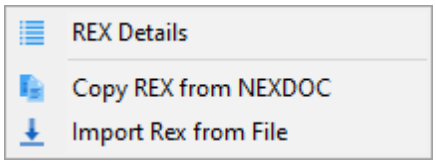
The **Popup Hints options** are useful for new users. The display time can be varied here or they can be suppressed completely.

2.2.9 Cloning Options



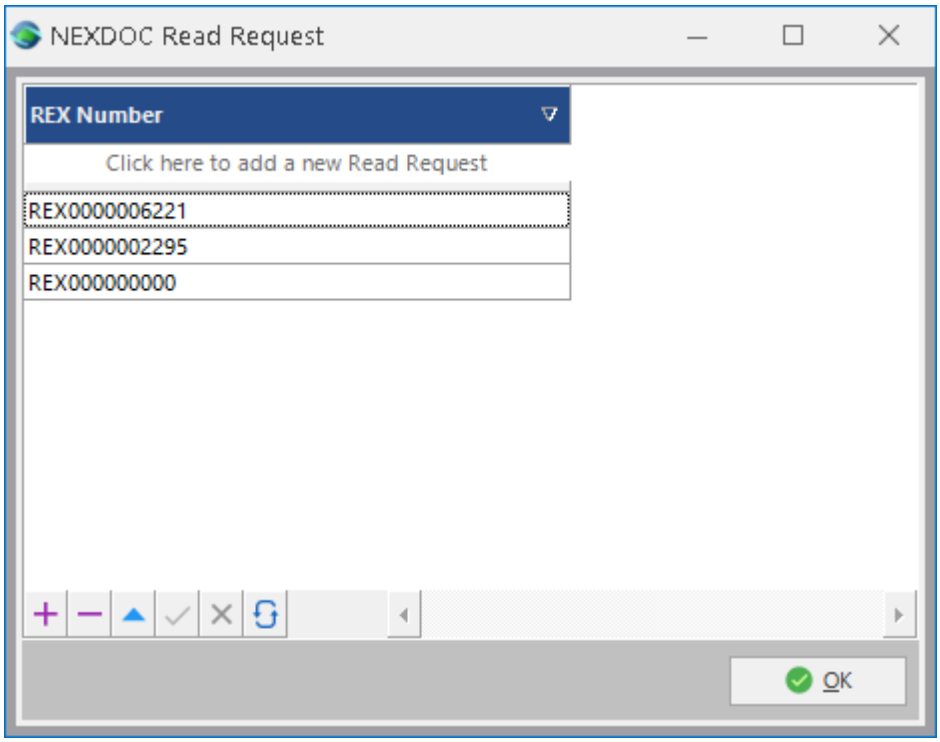
You can use this section to configure the default options of cloning.

2.3 Data Entry



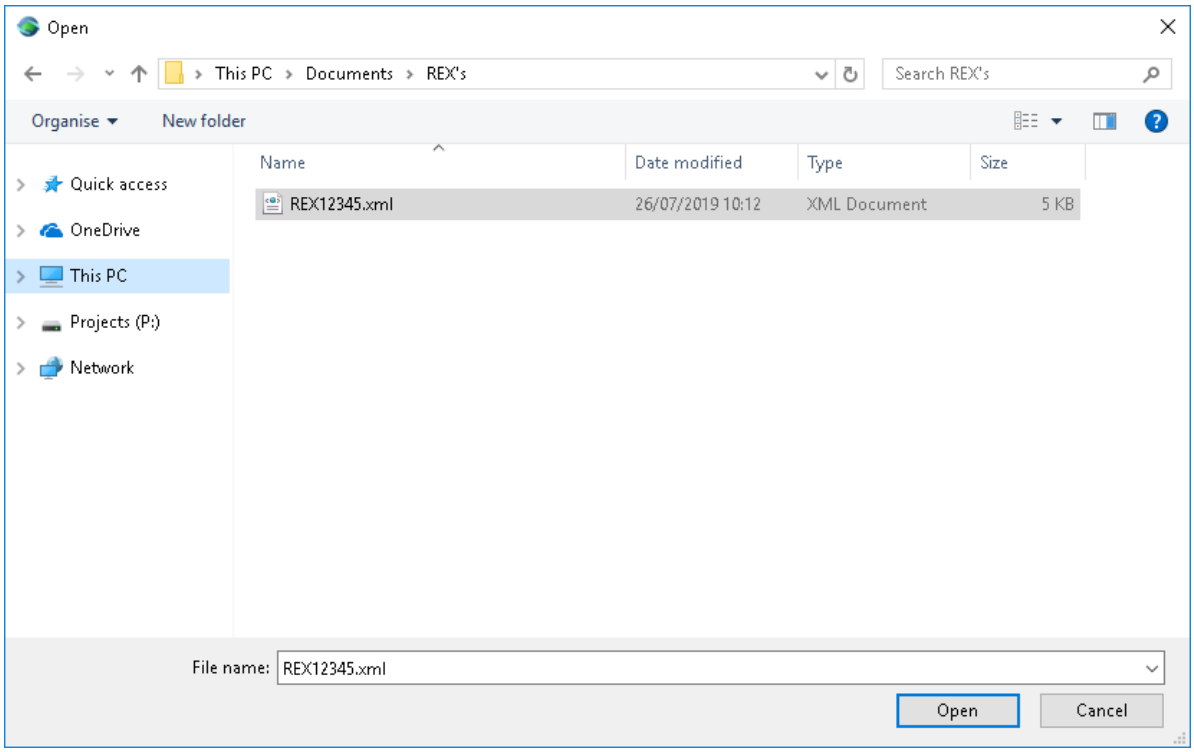
The **REX Details** option is another way to get to the REX List Form.

The **Copy REX from NEXDOC** option allows you to obtain REX's from NEXDOC that you may not have in your system yet:

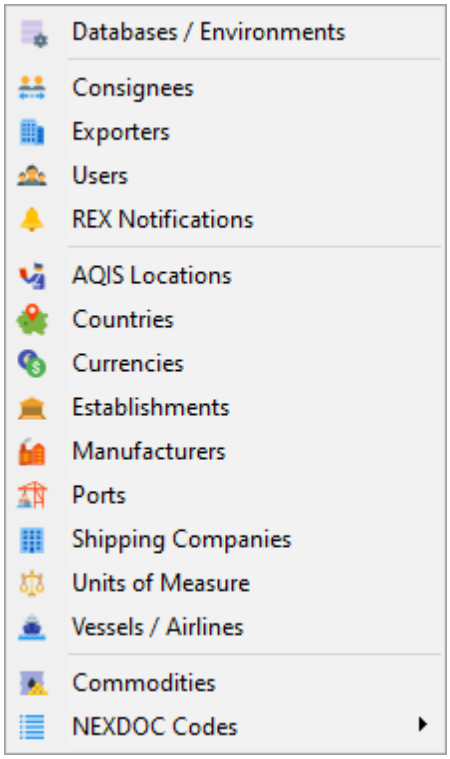


Enter in the REX numbers that you would like to receive and click 'OK'. This will trigger a Transmit and Receive, if the REX numbers entered are owned/linked to your Client ID and Tokens NEXDOC will send you the REX's.

The **Import REX from File** option can be used to Import a file that was saved from another copy of EdiSoft. It will prompt you with the ability to select a '.xml' file to upload into EdiSoft. Provided the .xml file was in the format EdiSoft expects the import should bring in the REX.



2.4 Tables



Here you can find access to all the reference tables used in the ***EdiSoft*** data entry/validation process.

Most of the tables are the same for all users and these are already loaded for you. Should you need to amend any of the tables, simply enter into the appropriate one and double click the record that you would like modified.

You will most likely need to create records in the tables which are specific to your organisation, ie. Exporters, Consignees (plus EDI Users and Certificate Print Locations for NEXDOC users). To do this, enter each of the tables and click on the "+" button. It is advisable to update these tables before you start data entry. However, there is the facility to add/update many of these tables through the REX data entry process.

The NEXDOC Codes can be downloaded from the NEXDOC site. Go into the table you wish to update and click on the Update from NEXDOC Site button. The latest table should then be downloaded. A Codeset Update is also possible if you would like to update all tables at once.

2.4.1 Databases / Client Groups

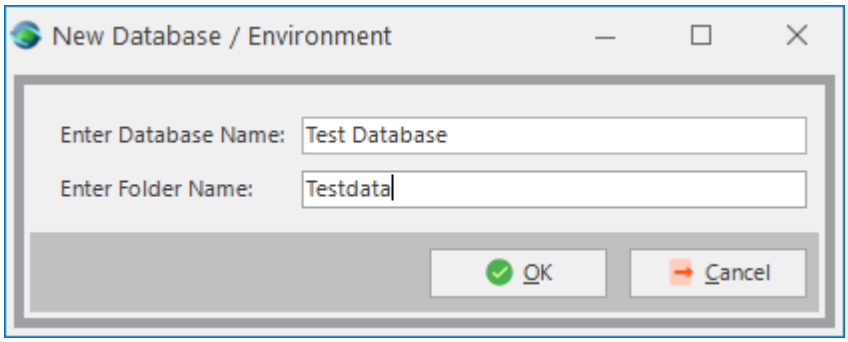
Using the 'Databases / Environments' table, it is possible to setup 2 separate databases inside EdiSoft.

This is optional and not required, however if you would like a Test database separate to your live database this is a great option.

1) To setup another database, first navigate in the menu to Tables -> Databases / Environments

2) Click the '+' icon at the top right in the navigation panel

3) Enter a name for the Database and a folder name and click OK.



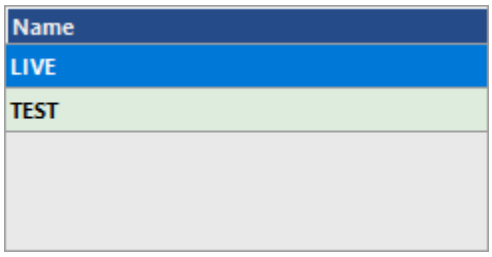
By default, EdiSoft will create the folder under the install directory. For example, if EdiSoft is installed under 'C:\Edisoft4', the above folder would create at 'C:\Edisoft4\Testdata'

5) EdiSoft will then create the required data files and will load up the database. You can then follow the First Time Running EdiSoft 4 steps again for this new database.

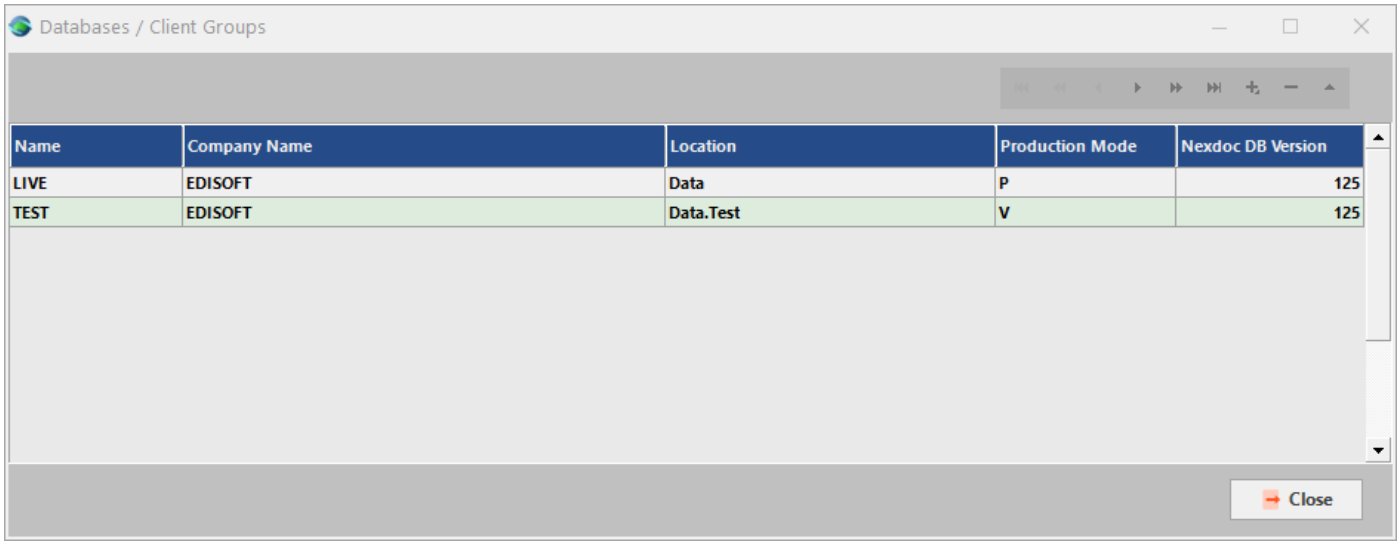
Swapping Databases / Client Groups

There are two ways to swap which is in use inside EdiSoft.

The first and easiest is from the main EdiSoft screen, where you will be able to select the database is in use:



The other method to navigate in the menu to 'Tables' -> 'Databases / Client Groups'. You can then select the database you would like to use and click 'Close':



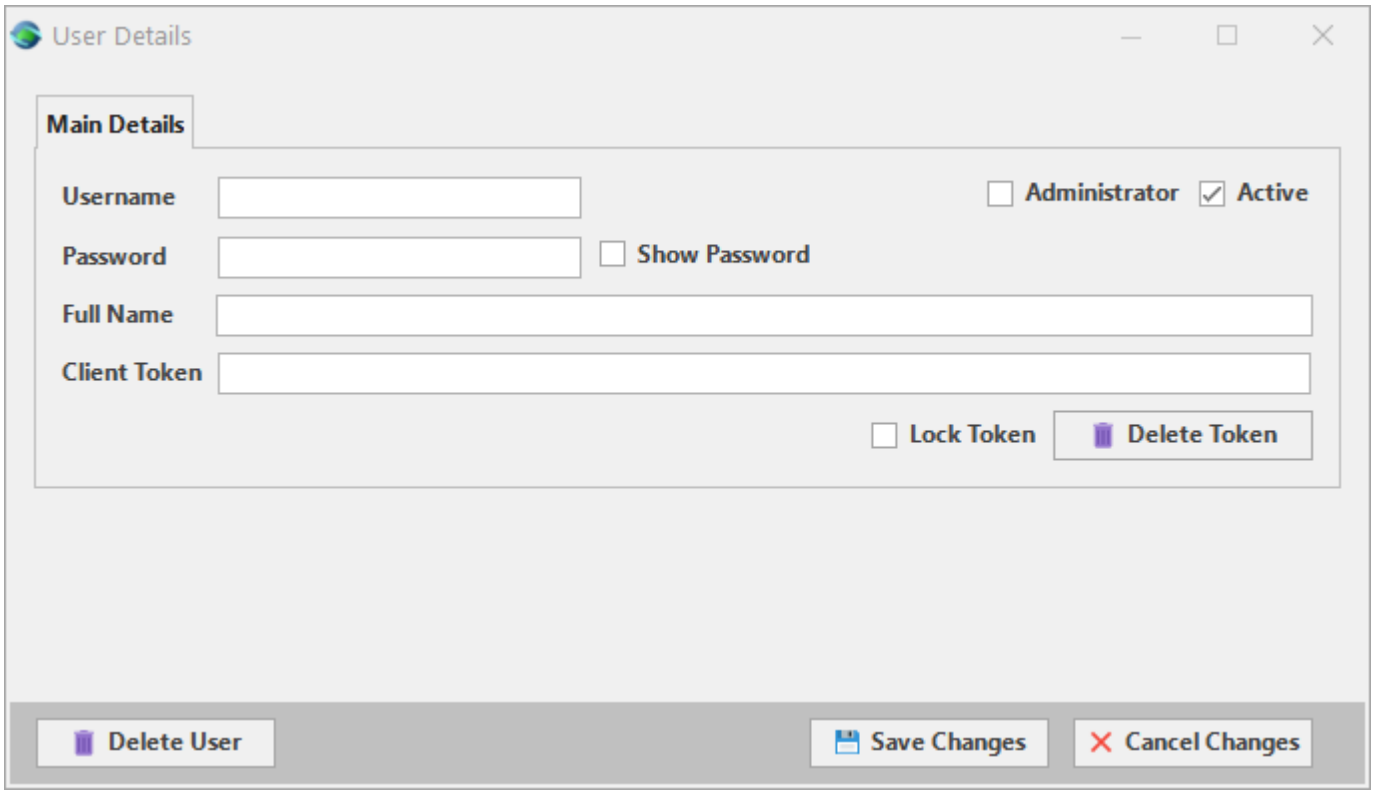
If you would like to hide certain databases or choose a default database, navigate to the Configuration section in the setup.

2.4.2 Users

In EdiSoft 4 it is possible to setup more than one user account, and thus the ability to have different users send and receive REX's with different Client Tokens from NEXDOC.

The settings that will need modifying to make this possible can be found under 'Tables' -> 'Users' from the EdiSoft menu bar.

One or multiple users can be setup here and each can have the following settings configured:



Username and **Password** fields are the details for the user to login with. The **Show Password** option can be used to hide or show the password characters.

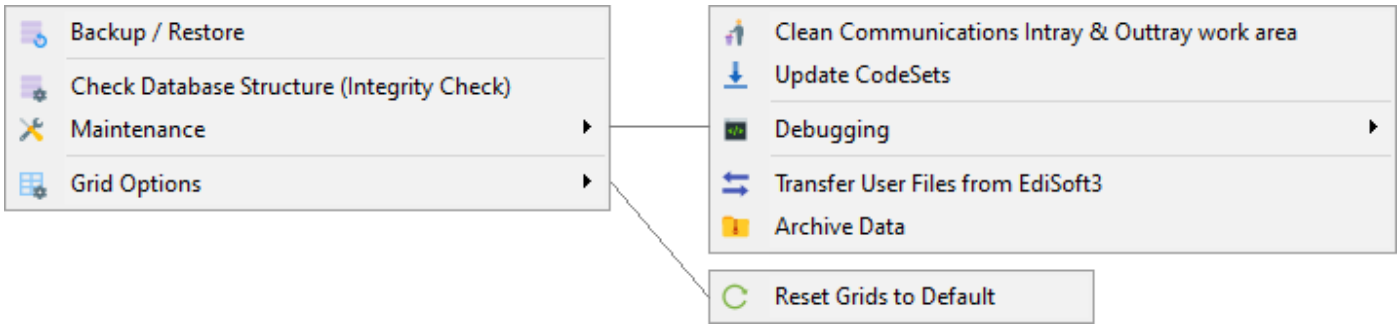
The **Client Token** linked to the logged in user will be communicated to NEXDOC when sending and receiving REX's. You can also use the **Lock Token** tickbox to hide the characters from showing.

Administrator - Use this option to give the user full access to EdiSoft. (if you don't have any administrator accounts set, all users will have full access)

Setting up EdiSoft without requiring a login:
If you only have one active user account, and have the password for this account as 'blank', EdiSoft will no longer require a login and will sign into the user account automatically.

Disclaimer: By configuring EdiSoft to not require a login, anyone who has access to your computer will be able to send NEXDOC messages using your Client and User Tokens. We only recommend this if you are the only EdiSoft and no one else is able to get access to your workstation but yourself.

2.5 Housekeeping



Backup / Restore provides the facility to backup the whole EdiSoft4 directory or just your own data files. This Backup procedure is recommended as a regular practice.

Check Database Structure (Integrity Check) will rebuild the indices and check that all tables have correct structure. This procedure should be run whenever you workstation has been shut down abnormally. It is a good practice to run this weekly in case some error has occurred.

Clean Communications Intray & Outtray work area will delete files located in the directory EdiSoft uses for communication, this can sometimes resolve issues after issues occur.

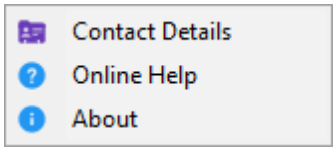
Update CodeSets will update all the tables containing codes from NEXDOC. This process can take a long time (15 – 20 mins) so if you only want to update one table, this is best done using the Update button in the specific Table

Debugging options are advanced options which can be useful for identifying communication faults.

Transfer User Files from EdiSoft3 is an option if you have used EdiSoft 3 to bring in previously entered Data to EdiSoft4

Reset Grids to Default option can be useful to restore all table filters and sorting back to the default view.

2.6 Help

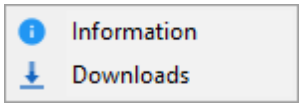


Contact Details brings up information about the software, and a note that directs users to technical support emails and phone lines.

Online Help brings up the help file manual. Please read through this before contacting the help desk for advice.

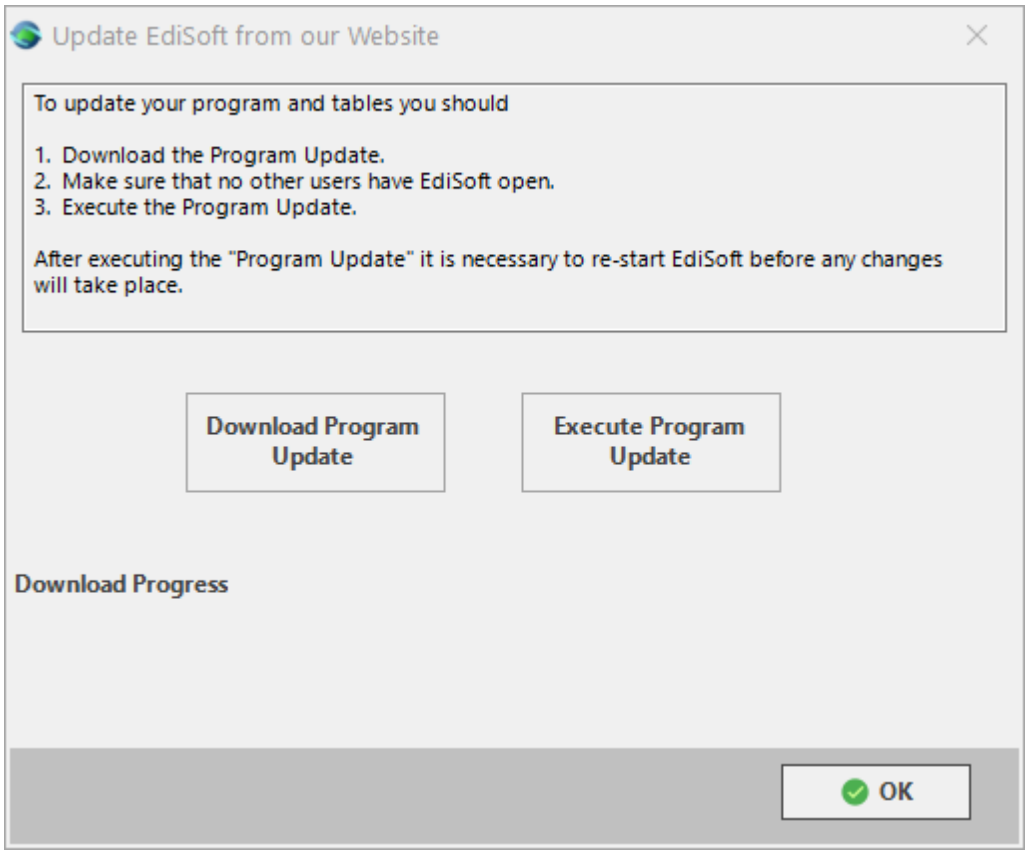
About brings up information about the software

2.7 Updates



Information
Information relating to the Woodwind Systems website.

The **Downloads** button show the below form:



Updates to Edisoft can be performed using 1 of two methods:

- Automatically (from within the program)
- Manual Download (using an Internet Web Browser)

Automatic Updates

1. Ensure that all other users have closed Edisoft and you are the only person using Edisoft.
2. Perform a full backup. (This can be done by choosing House Keeping, and then Backups from the menu).
2. Choose Updates and Downloads from the menu.
3. Click on the Download Program Update button. This will instigate the application download.
4. Once downloaded click on the Execute Program Update button. This will update Edisoft to the latest version.

Manual Updates

1. Ensure that all users have closed Edisoft and you are the only person using Edisoft.
2. Perform a full backup. (This can be done by choosing House Keeping, and then Backups from the menu).
2. Once the backup has completed close down your version of Edisoft too.
3. Visit the Edisoft website (at http://www.woodwindsys.com.au) and choose ***downloads*** from the menu).
4. Click on the download for the link of the version of Edisoft you are using.
5. Save the file to a location that you can access.

6. Once the file has been saved, open the file. This will take you through the update procedures. Once completed Edisoft will be updated to the latest version.

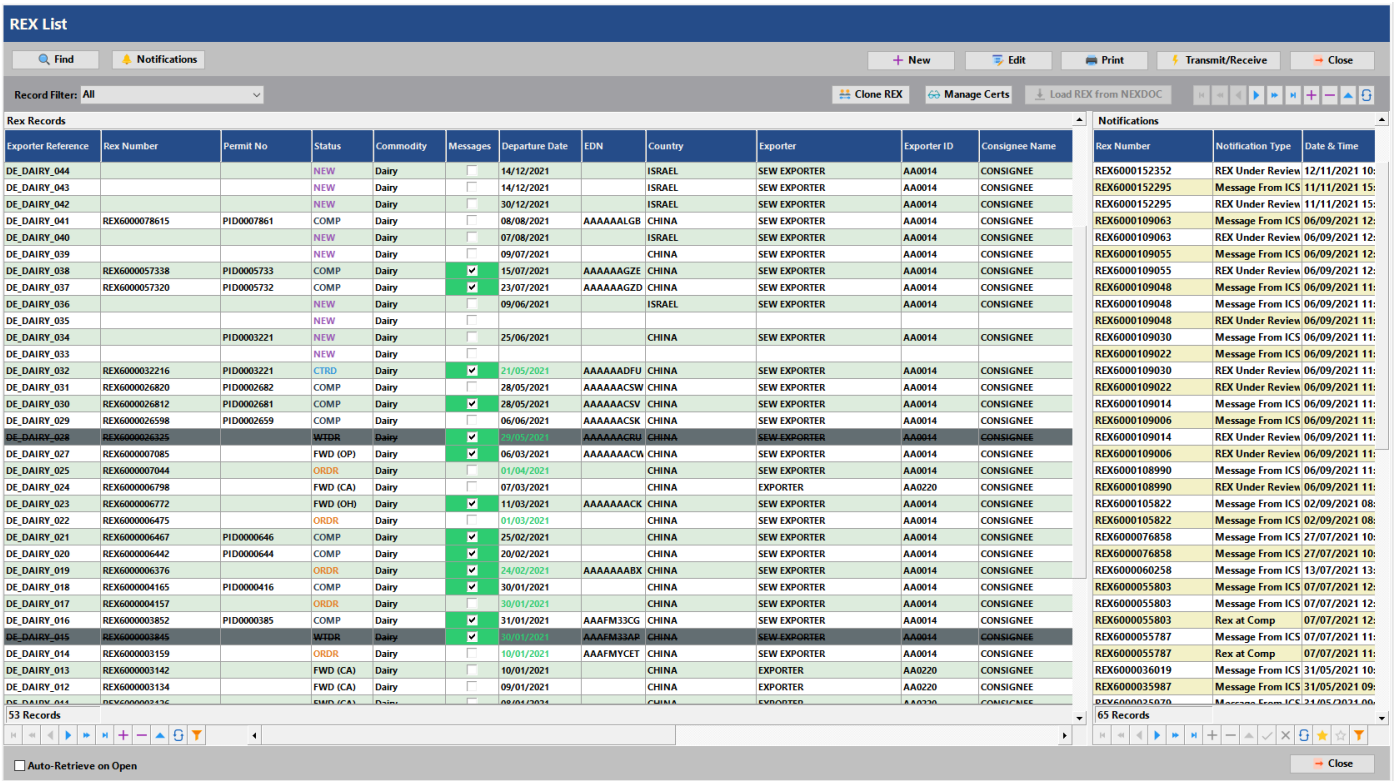
3 REXs

Following is a list of functions that you may need to use. These include:

Navigating and utilizing the REX List Form
Creating new REX's
Cloning existing REX's
Reloading REX's from NEXDOC
Withdrawing REX's from NEXDOC
Deleting REX's
Importing REX's
Exporting REX's
Amending REX's

3.1 REX List

As well as being able to use Basic Grid Functionality, there are lots of different functions available on the REX List form.



Filtering, Sorting and Searching Options

All - Loads and shows all REX's regardless of the status or time created.

Show Outstanding - Loads and shows all REX's apart from those at 'COMP' or have been forwarded.

Current/Future - Loads and shows only REX's that don't have a departure date of over 10 days old.

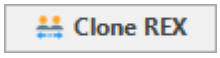
Find

Clicking the 'Find' button opens up search options that can be very useful when finding REX's in a large database. Type key numbers or letters in the Textbox which appears and click Find to filter the list to relevant REX's.

Hotkey on keyboard: ***Ctrl + F***

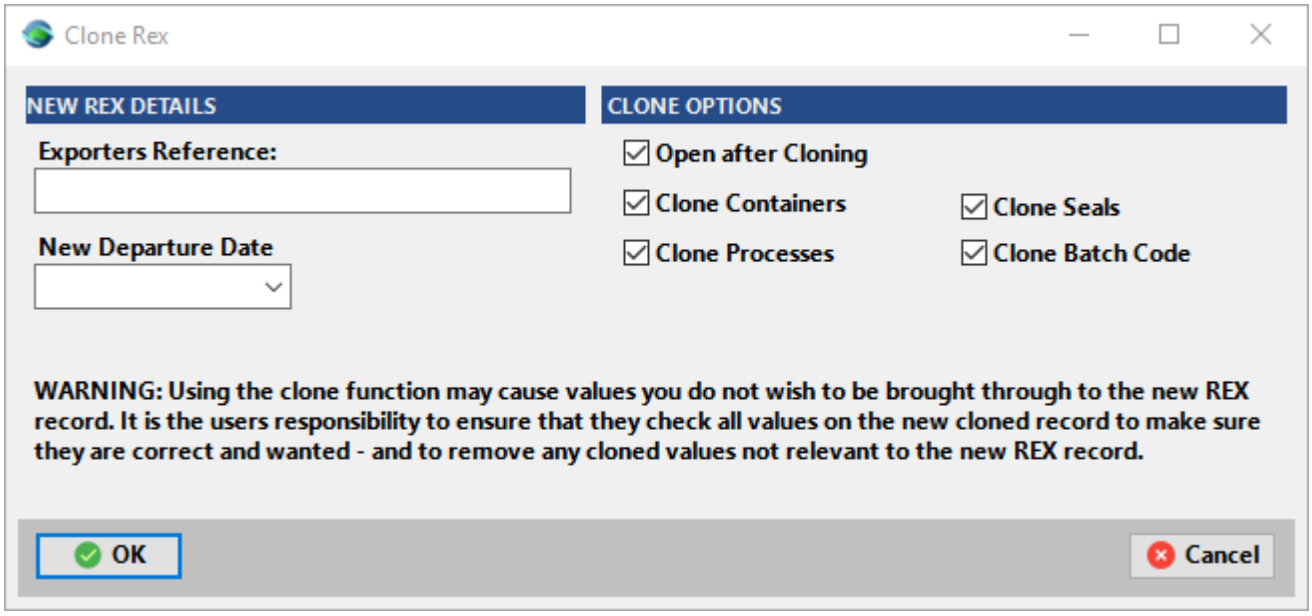
Further filtering options can be found under Sorting and Filtering.

Clone REX



Select on the grid the REX you would like to duplicate and click the above button.

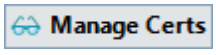
The below screen should then appear:



Enter in the Exporters Reference and New Departure Date for the new duplicate REX.

As the warning suggests you should always check the REX after cloning to ensure the information is correct and wanted.

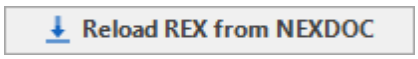
Manage Certificates



Select this button to view your list of Certificates. (another name for these are Phytosanitary Certificates)

We suggest checking out the Certificate section for more information regarding this.

Reload REX from NEXDOC



Also known as 'copy requests' or 'read requests', it is possible to reload REX's from NEXDOC if required. Doing this will replace any details for the specified REX with the details NEXDOC have in their system.

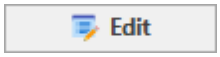
To perform this function, you first need to select the REX you would like to 'reload' before clicking the 'Reload REX from

NEXDOC' button.

Notes:

The REX must have a NEXDOC number for this to be possible
You can only perform this one REX at a time from the REX List (you cannot select multiple)

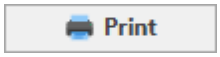
Edit



Use this button to Edit/Open the selected/highlighted REX.

Hotkey on keyboard: ***Ctrl + O***

Print



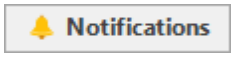
Use this button to Print/Print Preview the selected/highlighted REX.

Transmit / Receive

Use this button to Transmit and Receive any REX's/Notifications queued or sent to you from NEXDOC.

In numerous cases, REX transmit and receives will occur automatically from other NEXDOC communication functions. (Such as sending REX's, Executing Ownership Transfers etc.)

Notifications



Click this button to open the Notifications form.

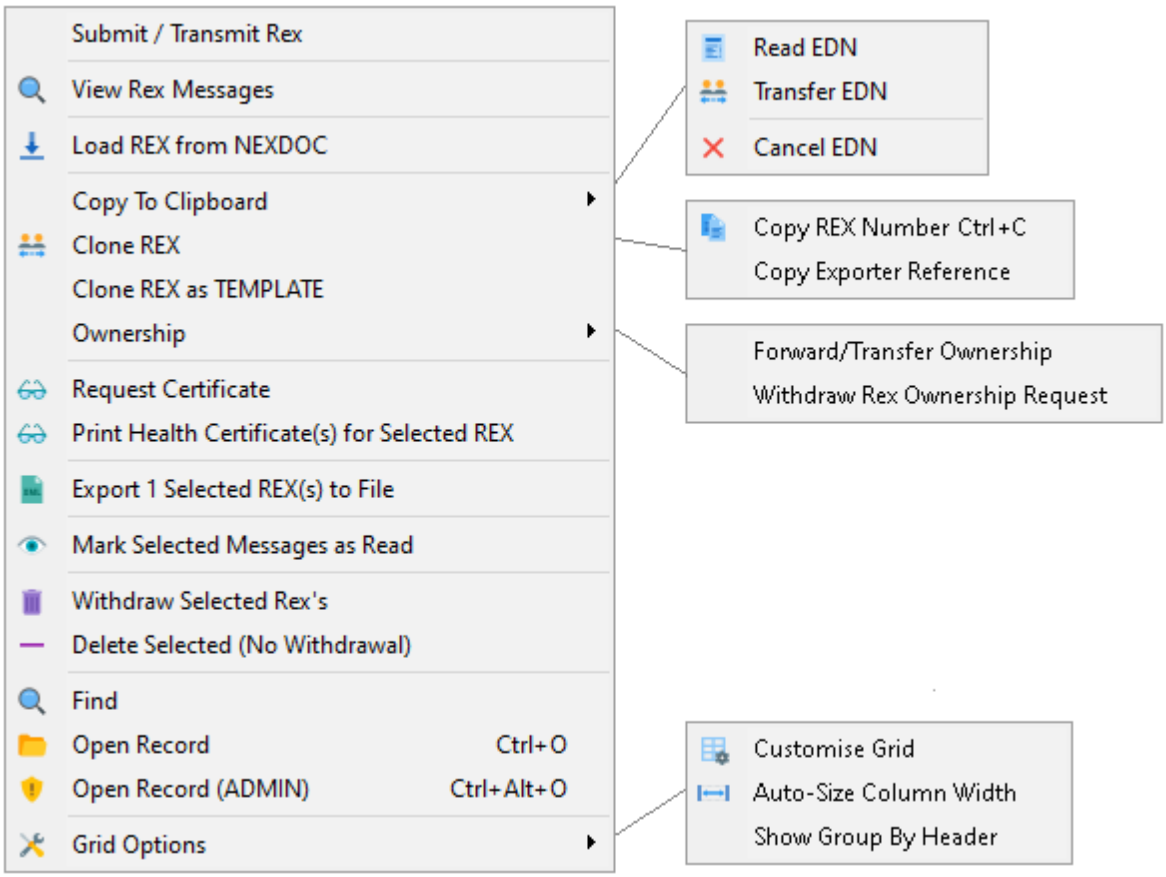
Messages

The message column on the REX List shows a tick (and is highlighted green) for any REX's that have unread messages from NEXDOC.

You can view the Messages for a REX by clicking on this column for the specified REX.

Right Click Options

It is possible to 'right click' on the grid after selecting a REX or multiple REX's for more options:



We have detailed what each option does below:

Submit / Transmit Rex

This connects to the NEXDOC portal and lodges the REX or any amendment requests.

View Rex Messages

Click this to open up a dialog that displays Messages for the selected REX. (Allows you to view the dialog without first opening the REX).

Note: This performs the same operation as clicking in the Message Cell on the Rex list Grid.

Reload REX from NEXDOC

This performs the same function as pressing the button Reload REX from NEXDOC.

Read EDN

This option will request an EDN for the REX if you are using SEW.

Transfer EDN

This performs the same function as the Transfer EDN button that can be found when editing a REX.

Cancel EDN

This sends a withdrawal/cancel request for the EDN to ICS

Copy To Clipboard

These options can be useful if you want to save/copy a REX number or Exporter Reference to your computer.

Clone REX

This performs the same function as clicking on the button Clone REX.

Clone REX as Template

This can be helpful if you create similar REX's and would like to build from a set template. This option performs the same function as a Clone REX, however instead the status of this REX will be 'TEMPLATE'.

Ownership

These options perform the same operations found in the Ownership section REX's.

Request Certificate

Use this option to request a Certificate. See the Obtaining Certificates section for more information.

Print Certificate(s) for Selected REX

This option brings up a preview window to print the selected REX. See the Printing Certificates section for more information.

Export Selected REX(s) to File

This option gives you the ability to export the selected REX's into XML files. You will be prompted to save each REX into a location of your choice.

Mark Selected Messages as Read

Use this option to mark all Messages for the selected REX as 'acknowledged'.

Withdraw Selected REX's

Use this to submit a Withdrawal to NEXDOC for the selected REX's.

Delete Selected (No Withdrawal)

This option Deletes a REX from your system without sending a withdrawal to NEXDOC to remove it from their system.

Find

This performs the same function as clicking the Find button

Open Record

This performs the same function as clicking on the button Edit.

Open Record (ADMIN)

This opens the selected REX with more options available. All fields for all commodities should be editable regardless of the status. We don't recommend opening REX's like this as you will be able to edit many fields that NEXDOC don't allow. However, this is a debugging extra we have provided for special cases if they are ever required.

Hotkey on keyboard: ***Ctrl + Alt + O***

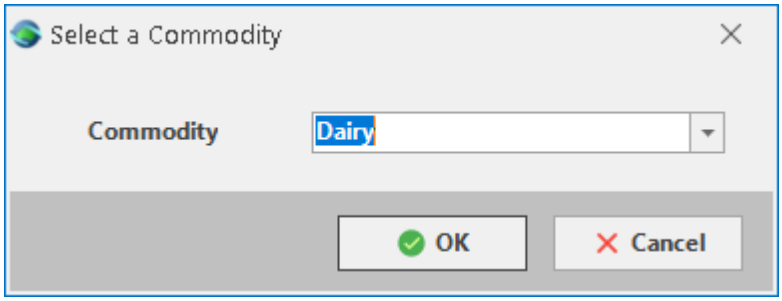
Grid Options

Use these options to customize the REX display grid. See the Basic Grid Functionality section for more information on this.

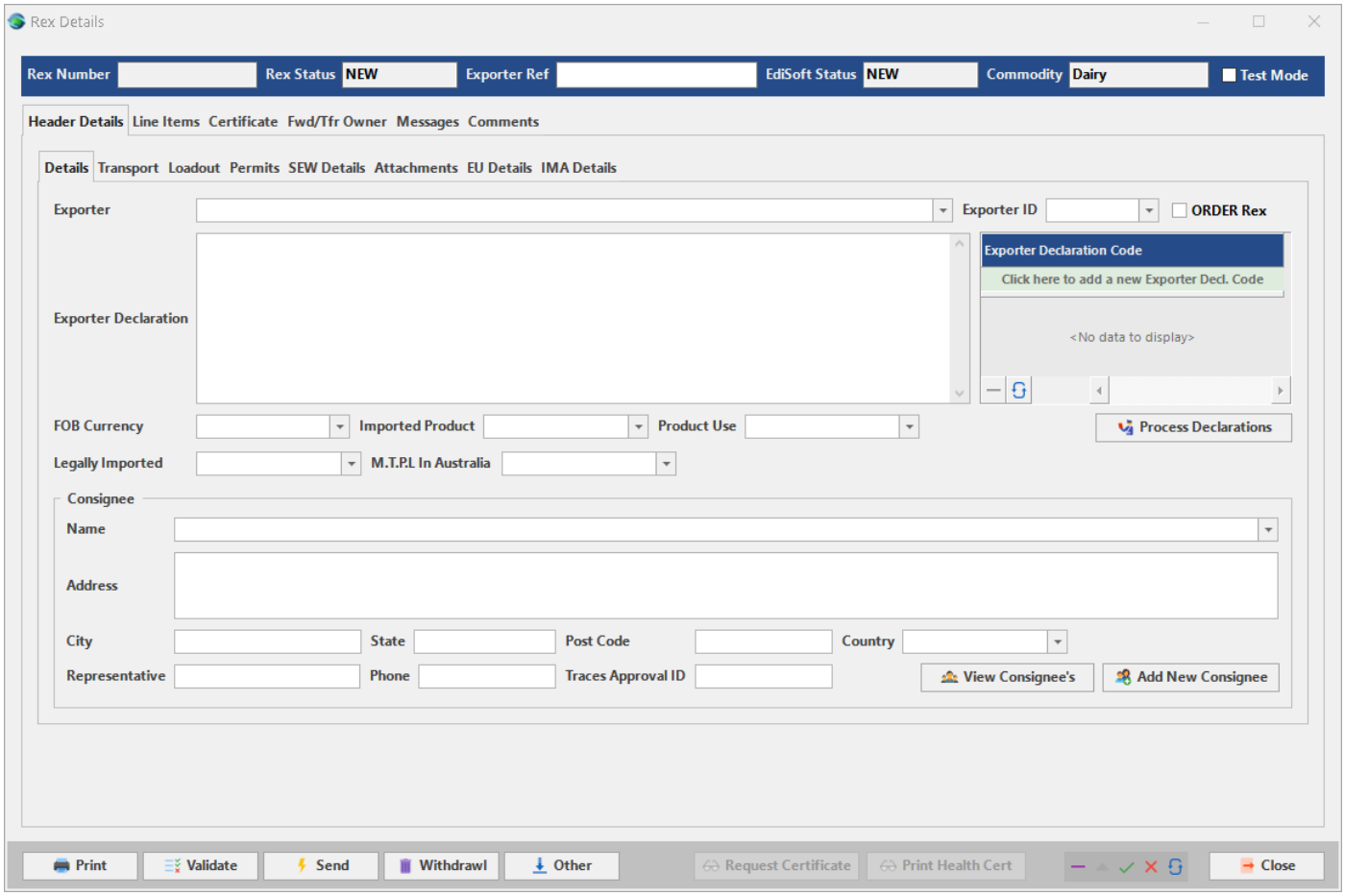
3.2 Entering REX's

Click the '+' button on the REX List form to enter a new REX

You should then be prompted to select the Commodity you desire:



The below form should then appear:



It is essential that you enter at least an Exporter Reference before saving the REX. (Exporter Reference numbers must be unique)

This detail data entry screen may display slightly different depending on which commodity REX you are entering. The nature of the data requires each record to have one Header record and the possibility of multiple Line Items. The fields have been “folderised”. Each folder contains groups of related information. Progress through the folders and enter the required data. Press the TAB key or use the mouse to move to subsequent fields. Although it is possible to enter the information in any sequence, it is logical to complete the header information first and then click on the line items folder and progress through them one at a time.

Hint when using lookup controls:
You can click on the small arrow to cause the list to drop down and then find the required record by keying in the first

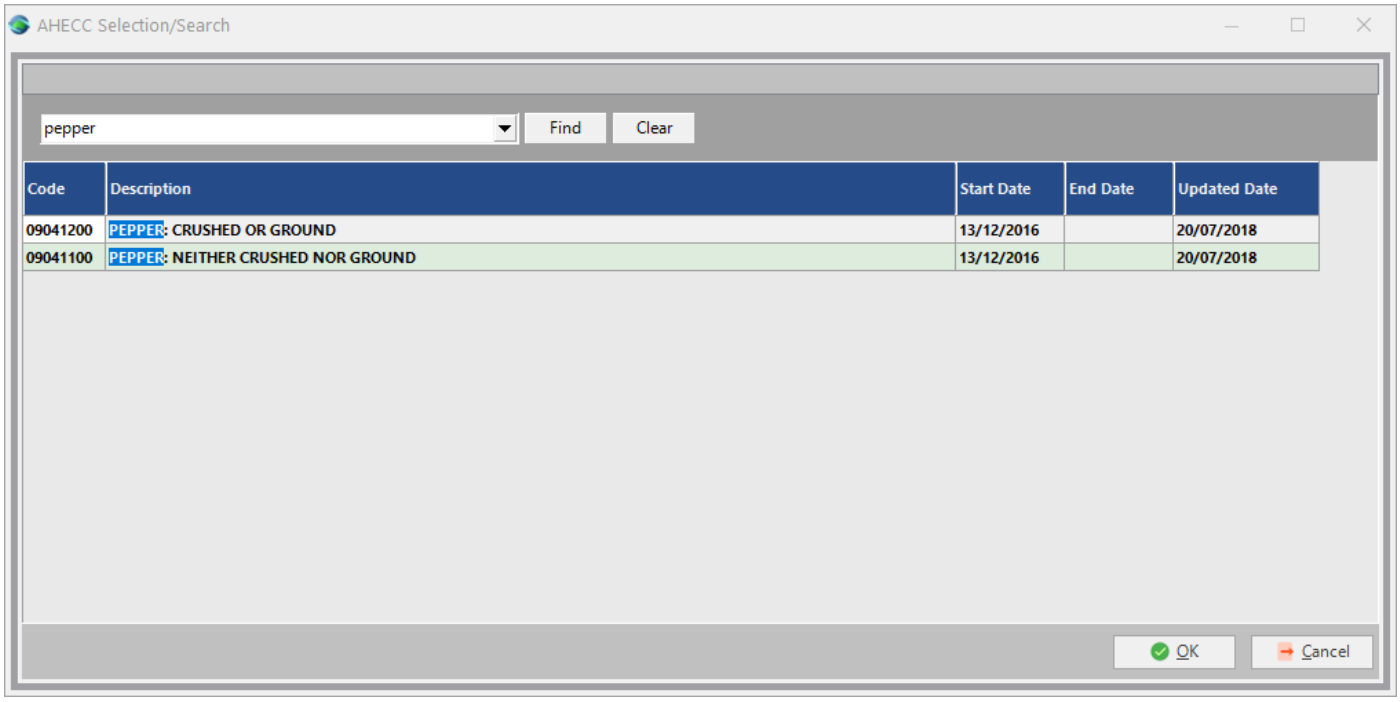
few characters of the name or description. If the cursor is in the field already then just key in the first few characters and the list will drop down automatically.

In the same manner, and fill in the remaining fields in the Header Details folder, pressing the Tab key to move to the next one. If you do not know what to put into a field you can ring the NEXDOC Help Desk. If you know what the data is and what it is used for but cannot find the appropriate field, email the EdiSoft Help Desk. This "separation of knowledge" is so that you can go to the correct source first but in most cases, either Help Desk will try to give you an answer. There is some overlap. *Note that it is not always necessary to fill in all the fields.*

When the cursor is on the last field in the Header Details and you press the Tab key to move to the next field, the Line Items folder will become visible.

Hint when entering Ahecc Codes:
Instead of selecting an Ahecc Code from the dropdowns, you can use the '...' button to search for an AHECC Code.

After opening the '...' button the following the popup box should appear. Here you can search key words to find your specific Ahecc Code easier.



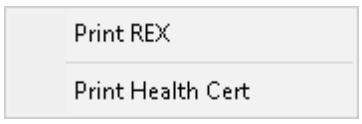
Click OK once you have selected your desired record to assign it to your REX.

REX Options

The following options exist at the bottom of the REX form, we have detailed their functions below:

Print:

You can use this option to Print a detailed report of your REX, or to Print your Certificate for the REX if one has been approved.



Validate:

This option does a quick validation check to see if you may be missing any critical information that NEXDOC require.

The below is an example of what may appear if you are missing critical information such as shipping details:

Send:

This option Sends the REX to NEXDOC.

Withdrawal:

Check out the Removing REX's section for more information on this option.

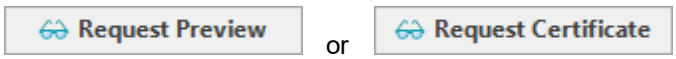
Other:

This button has further options once clicked:

The **Queue** option will queue the REX to Send next time a communication to NEXDOC occurs in EdiSoft.

The **Request EDN** option will allow to request an EDN if you are using SEW.

The **Request Certificate** option allows you to Obtain a Certificate from NEXDOC.



The **Request Certificate Replacement** is an option available to obtain a replacement Certificate.

Close:

This button saves and closes the REX Form.

3.3 Removing REX's

There are a couple of different ways to remove a REX from EdiSoft.

1. From within the REX form of your chosen REX

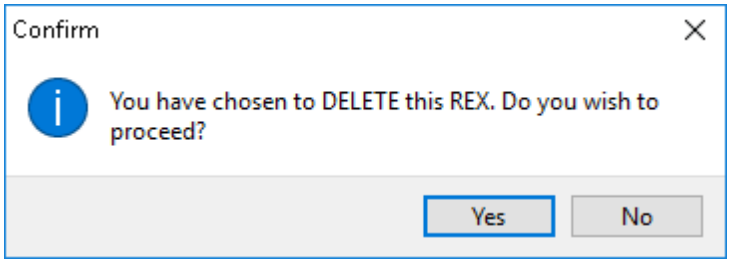
2. From the REX List

Below we have detailed both methods.

1. From the REX form of your chosen REX, click on the below button:

If you haven't had any communication with NEXDOC for the REX:

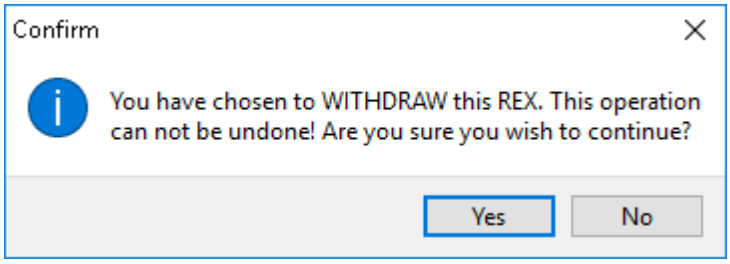
You will be prompted with the below:



If confirmed the REX will be removed from EdiSoft.

If you have had communication with NEXDOC for the REX:

The following will appear instead:



If you confirm this, EdiSoft then schedules a 'withdraw' message to get sent to NEXDOC. (next 'transmit and receive' will send the message) If you were to close the REX the record would show as the below in the REX List:

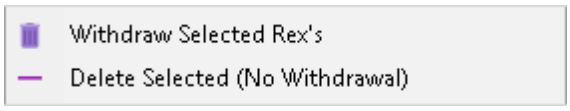
~~DE DAIRY 167~~	~~REX0000046227~~	~~TOWITHDRAW~~	~~Dairy~~

To send the message instantly, click 'send' when still in the REX:

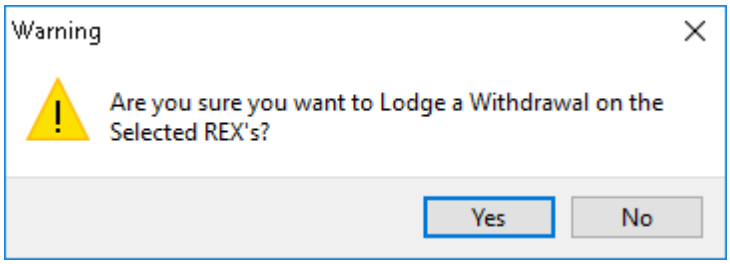
The scheduled 'withdraw' message will then be sent. If you close the REX and view the REX List again, the record would show as the below:

~~DE DAIRY 167~~	~~REX0000046227~~	~~WTDR~~	~~Dairy~~

2. From the REX List, this can be done by right clicking on your chosen REX(s) and using the following options:



The **Withdraw Selected Rex's** option will show the following message:

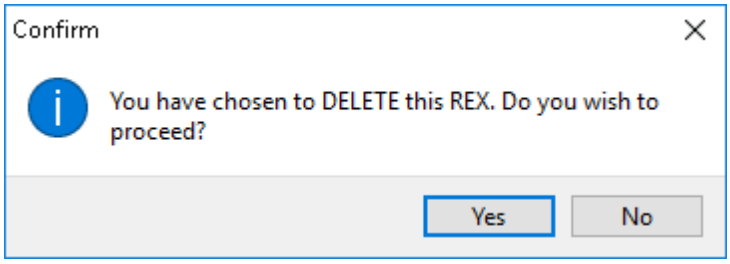


If confirmed the withdrawal message(s) will be sent

The **Delete Selected (No Withdrawal)**:

If you haven't had any communication with NEXDOC for the REX:

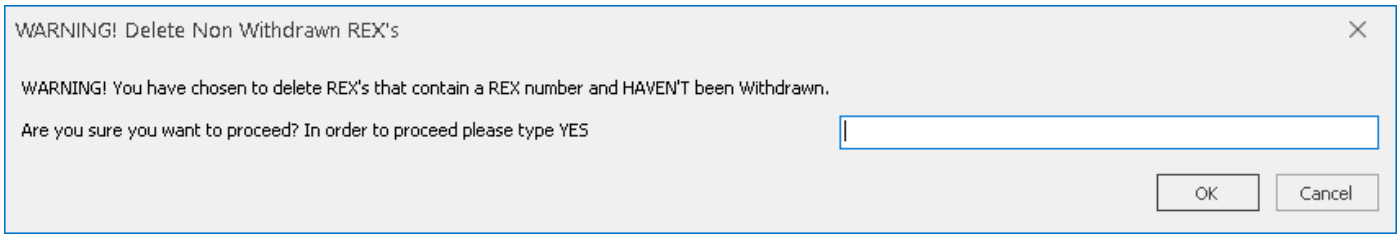
You will be prompted with the below:



If confirmed the REX will be removed from EdiSoft.

If you have had communication with NEXDOC for the REX:

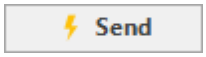
The following will appear instead:



You will need to type "YES" and click OK for EdiSoft to remove the REX from your system. Please note that this will not remove what NEXDOC will have in their system, thus we have made sure that this process cannot be done by accident.

3.4 Sending and Receiving REX's

When you are ready to send a REX to NEXDOC, click the following button on the REX form:



EdiSoft will then do the following:

1) A quick validation check.
A message will warn you of any missing data that NEXDOC requires if any issues are picked up

2) Send the transmission to NEXDOC

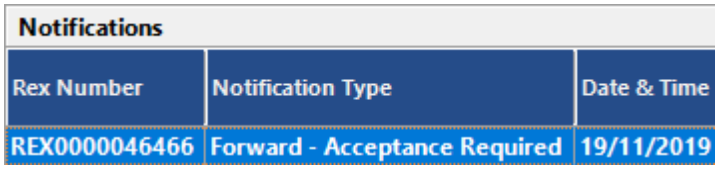
3) Receive the response from NEXDOC (this will also receive any additional messages that NEXDOC have sent to you know - not just specific to the REX)

4) Shows the results of the process

Receiving Forwarded or Transferred REX's

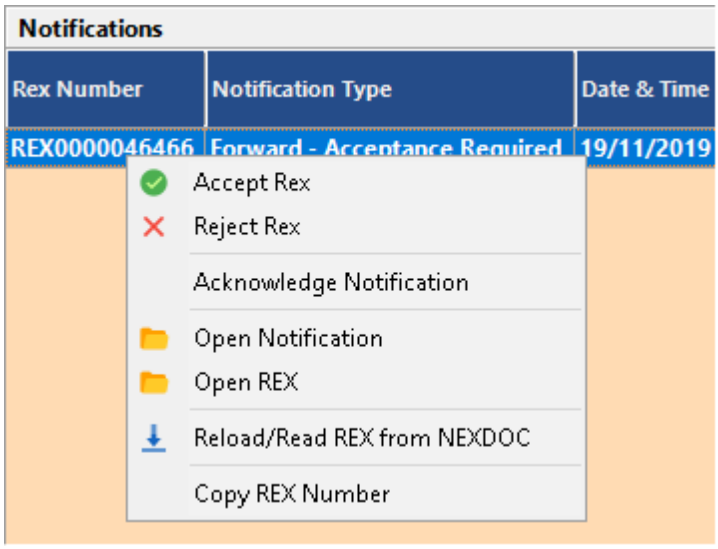
When receiving REX's or Notifications, if a REX has been transferred or forwarded to you, a notification should be available with details about the REX.

Example of a REX that has been forwarded to you:



In this example, acceptance has been required to receive the REX. Other times this may not be required, depending on who sent you the transfer/forward.

By right clicking on the notification in the grid, the following options are available:



Accept Rex - This option sends an acceptance message through to NEXDOC, and the REX can then be collected into your system.

Reject Rex - This option sends a rejection message through to NEXDOC so they can notify the original sender that the REX ownership change has been rejected.

Acknowledge Notification - Acknowledging the REX essentially marks the notification as 'read' which removes it from

showing in certain lists.

Open Notification - This opens the Notification form which shows more details

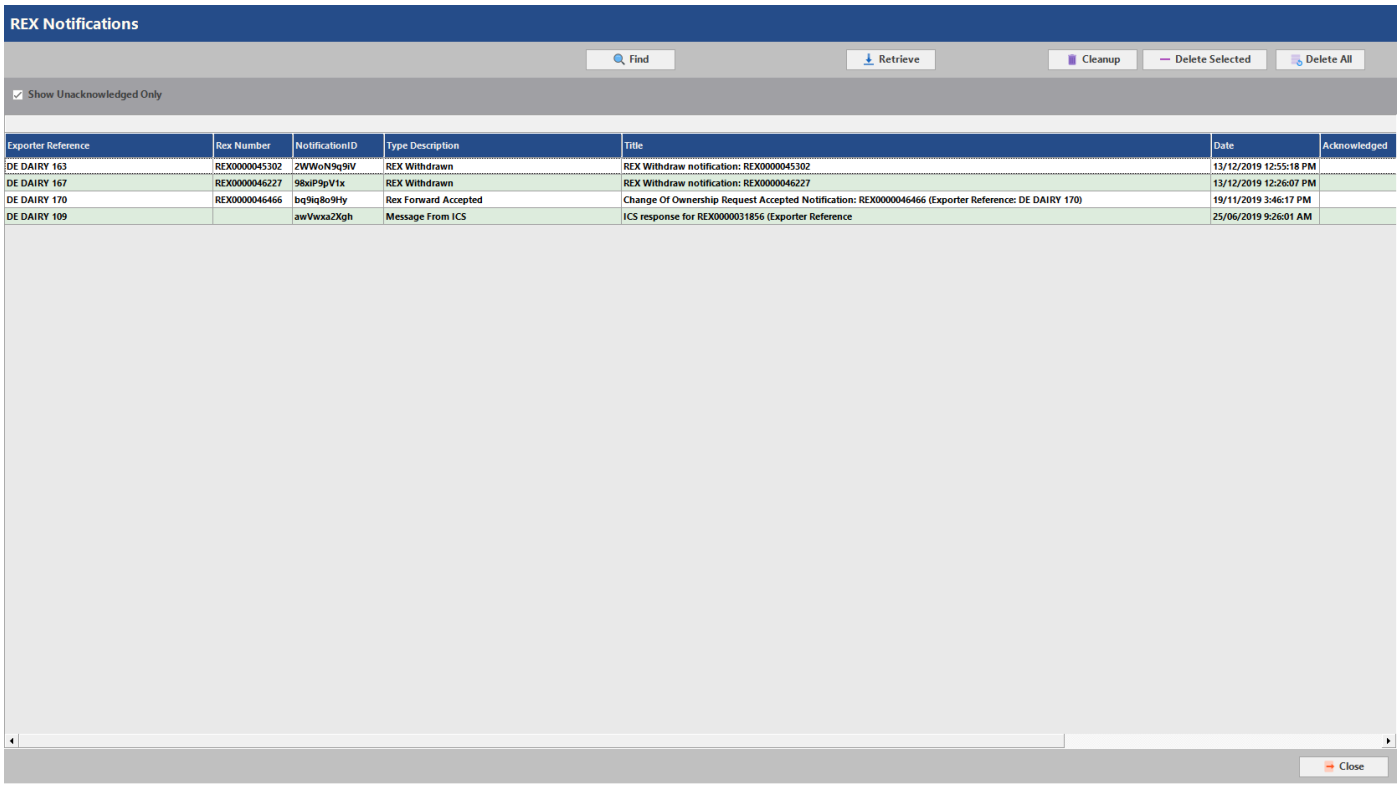
Open REX - This Open's the REX if it is already in your system

Reload/Read REX from NEXDOC - This will perform a Read Request to obtain the REX or update your REX with the latest details that NEXDOC has in their system.

Copy REX Number - This copied the REX Number to your windows clipboard

3.5 Notifications

The Notification Form shows a list of Notifications from NEXDOC:



The following options are available from this form:

Show Unacknowledged Only

This tickbox toggles the acknowledged records from hiding or showing.

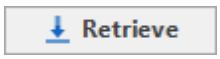
Find

Clicking the 'Find' button opens up search options similar to that on the REX List form. Type key numbers or letters in the textbox which appears and click Find to filter the list to relevant Notification's.

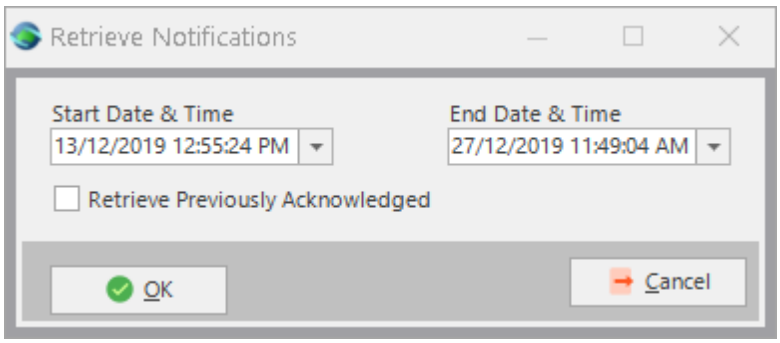
Hotkey on keyboard: ***Ctrl + F***

Further filtering options can be found under Sorting and Filtering.

Retrieve



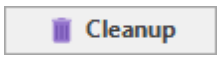
This button brings up the following pop-up:



Using these options it is possible to retrieve Notifications between a selected period of time. You can also select to collect notifications that have previously been acknowledged using the 'Retrieve Previously Acknowledge' tickbox

After clicking OK EdiSoft will retrieve the selected range of Notifications from NEXDOC's system.

Cleanup

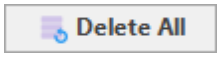


This button can be used to remove duplicate Notifications if they exist in your list.

Delete Selected

By using this button, it is possible to delete the notifications that you have selected.

Delete All

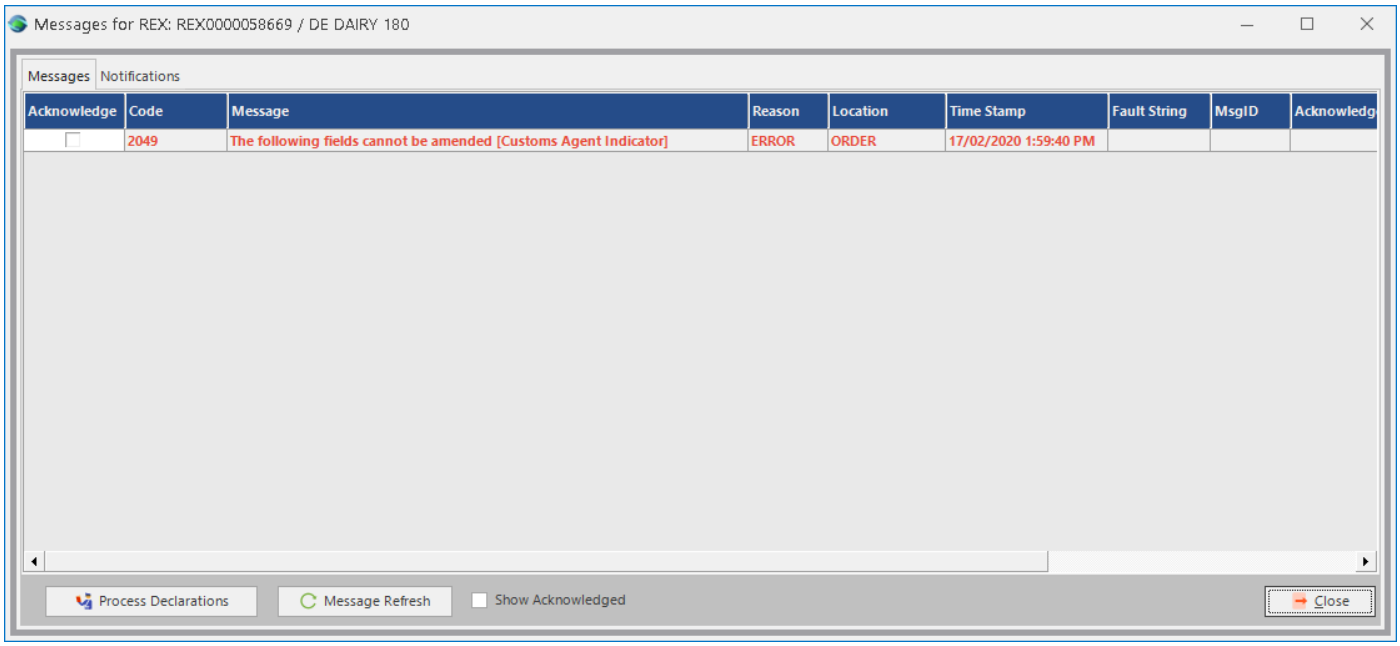


Use this option to delete all Notifications in your EdiSoft system.

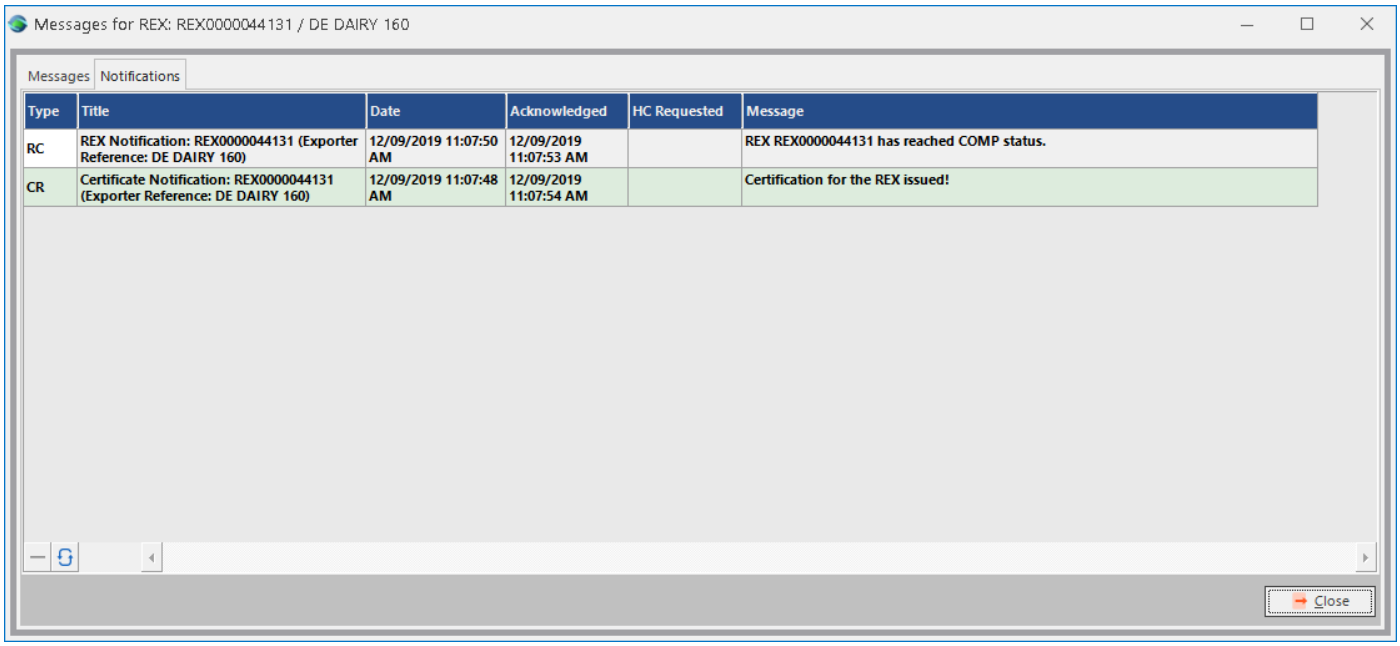
3.6 Messages

This form displays messages and notifications that have been communicated from NEXDOC.

Messages are generated by EdiSoft from NEXDOC REX responses where there is a critical error.

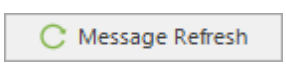


Notifications are from NEXDOC and also show in the Notifications form.



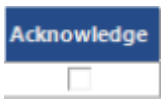
The functions on this form are explained below:

Message Refresh



This button will do a refresh/update on the table

Acknowledge



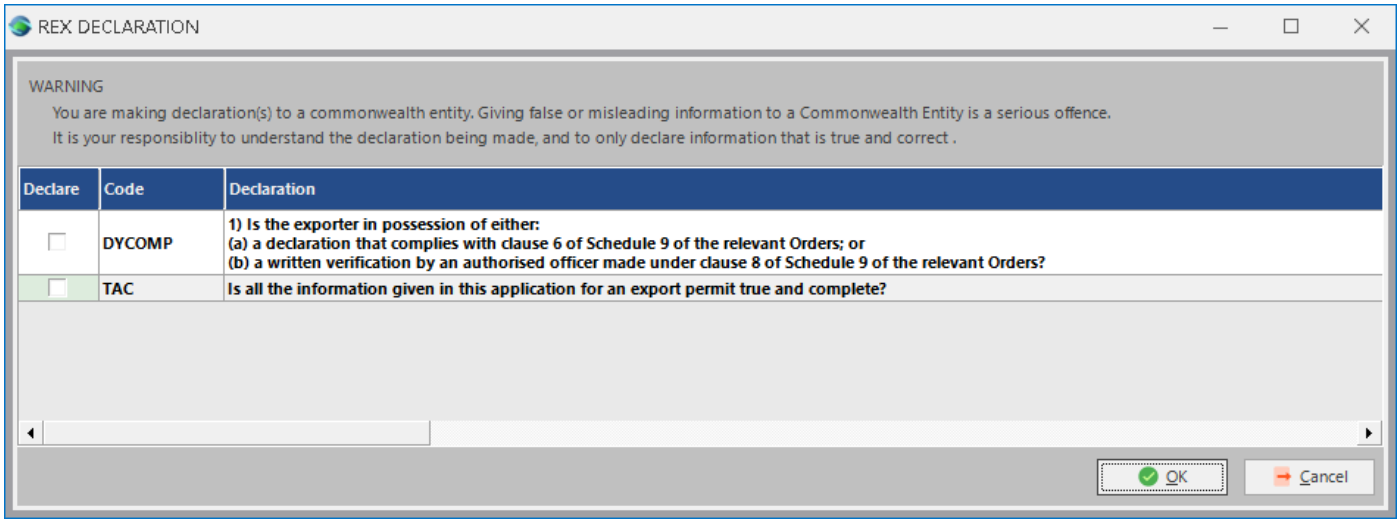
Use this to mark messages has read/acknowledged.

Show Acknowledged

If this option is ticked messages that have been marked as acknowledged will still show in the table

Process Declarations

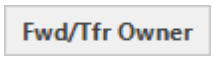
If NEXDOC has responded that declarations codes click this button to bring up the below form



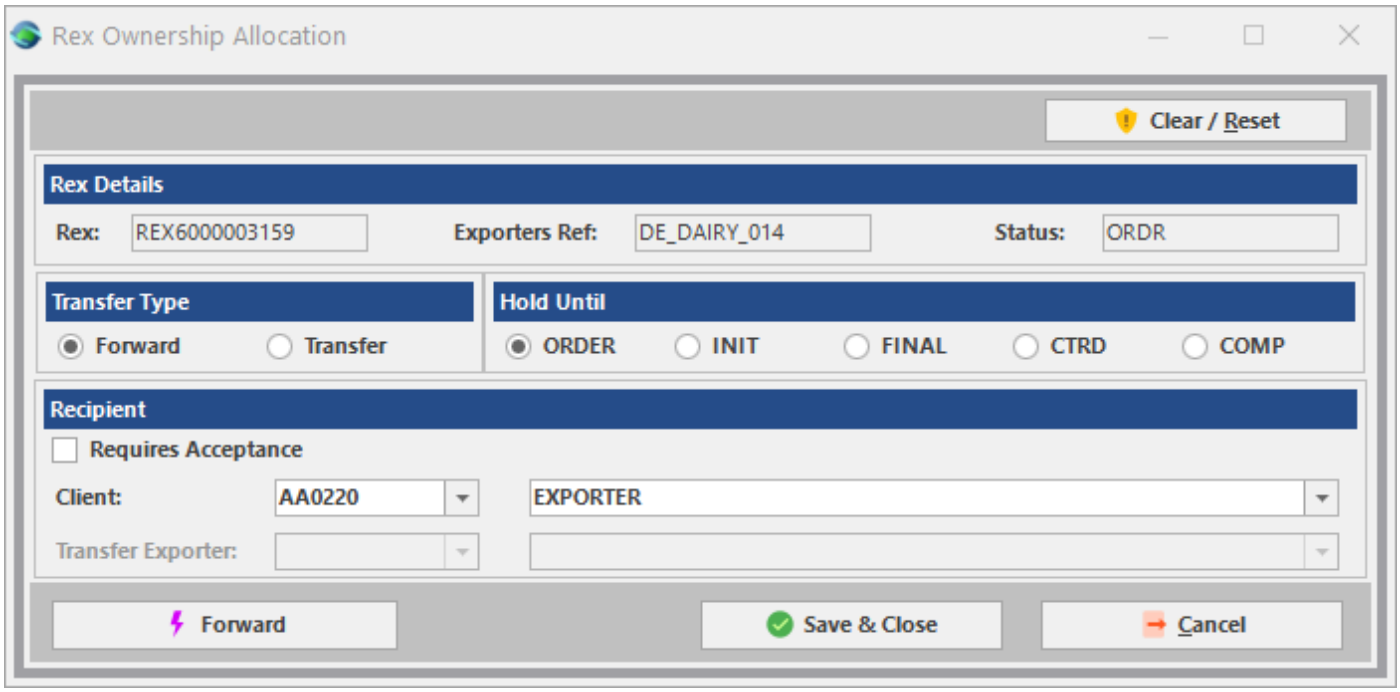
From this form you are able to tick the declaration codes required, and click 'OK' to add them to your REX.

3.7 Transferring and Forwarding REX's

To Forward or Transfer a REX to another Client, click on the 'Fwd/Tfr Owner' Tab on the REX List.



The following options will then be available:



Transfer Type - Select 'Forward' or 'Transfer' to select your desired transfer method.

Hold Until - Select the status if you would like to hold your REX from Forwarding until a certain status.

Requires Acceptance - Tick this box if you would like it mandatory for the Client to need to accept the transfer.

Client - Use these drop-downs to select the Client you would like to transfer or forward your REX to.

Transfer Exporter - Use these drop-downs to select the Exporter you would like to transfer the REX on. (Only applicable for Transfers)

Forward: (This option appears if 'Forward' is the Transfer Type)

Click the Forward button to process the Forward, or Save & Close to perform it later but still keeping it ready.

Forward: (This option appears if 'Forward' is the Transfer Type)

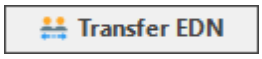
Click the Transfer button to process the Transfer, or Save & Close to perform it later but still keeping it ready.

3.8 Transferring EDN's

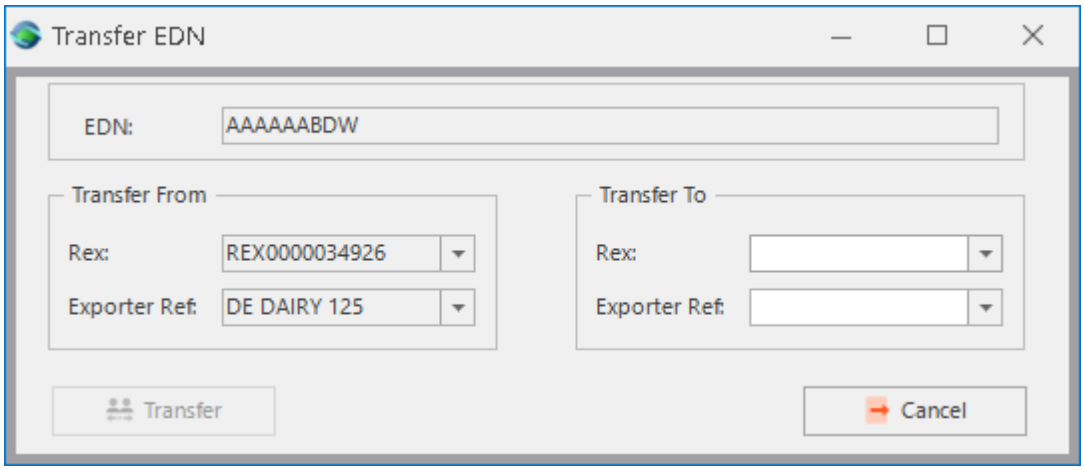
It is possible to transfer your EDN's to another REX in EdiSoft. We have provided steps on how to do this below.

1) Navigate to the 'Header Details' -> 'SEW Details' section of a REX

2) Click on the 'Transfer EDN button:

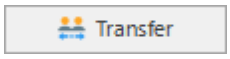


3) The following screen should then appear:



4) Use the 'Transfer To' dropdown options to select the REX in which you would like to transfer your EDN to:

5) Click 'Transfer' and EdiSoft will send a transmission to NEXDOC to transfer the EDN.

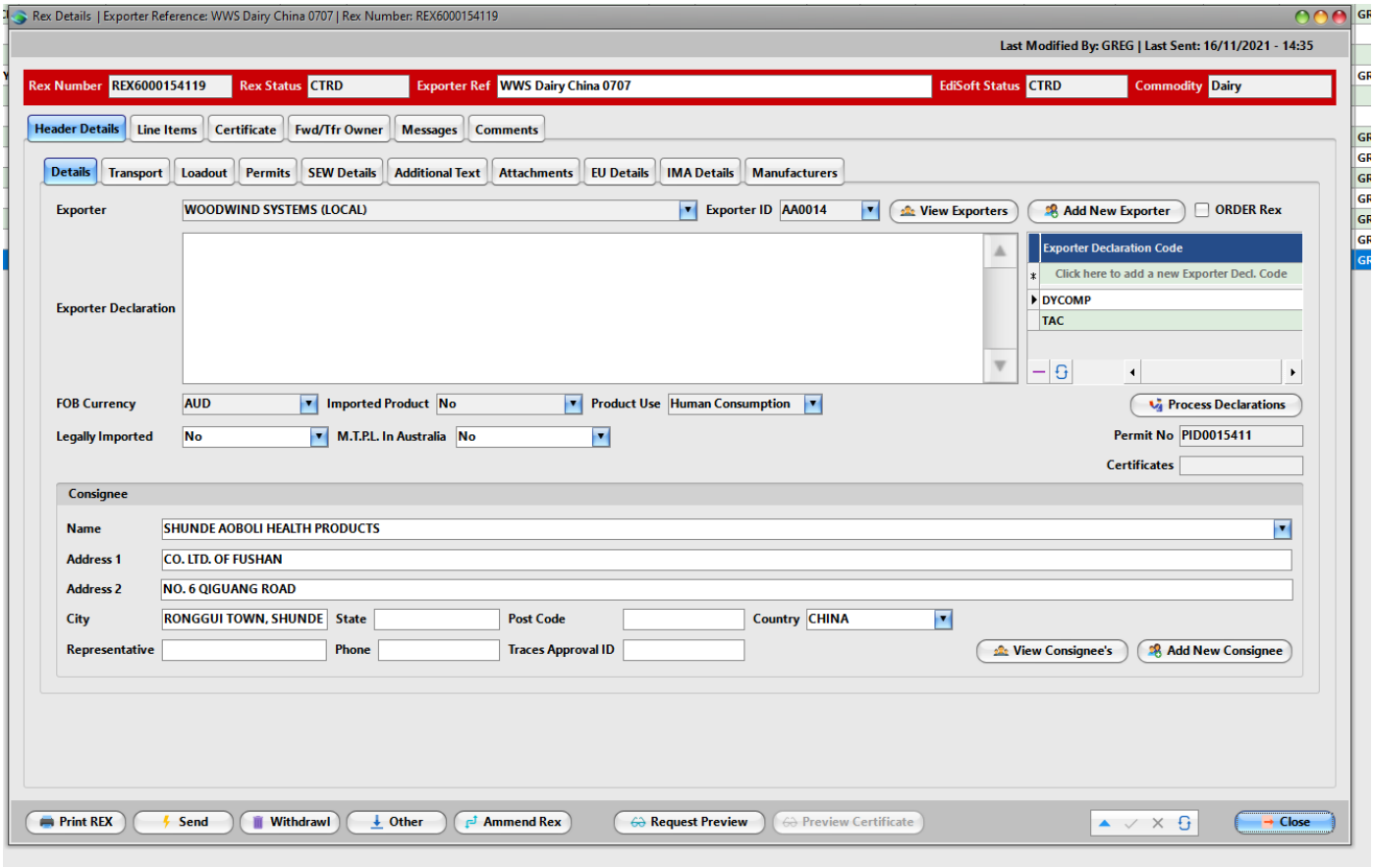


3.9 Modifying REX's at CTRD

If you find an error in a REX when it has reached CTRD you can change it but the method is different depending on which fields you wish to change. Some fields can be changed without the need to be Reviewed by somebody from DAWE, but other fields relating to Product etc., require Review.

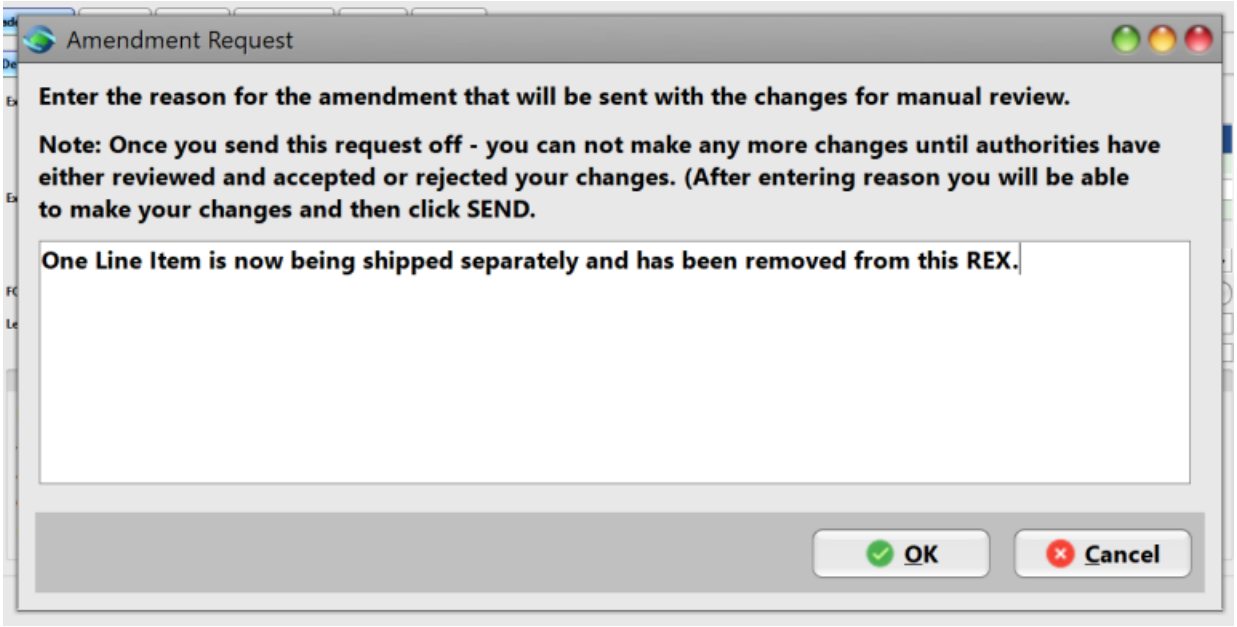
For fields that do not require Review. You can just change these in the normal manner and Send them.

However, for fields that require Review when you are in the REX Detail screen it will look like this:



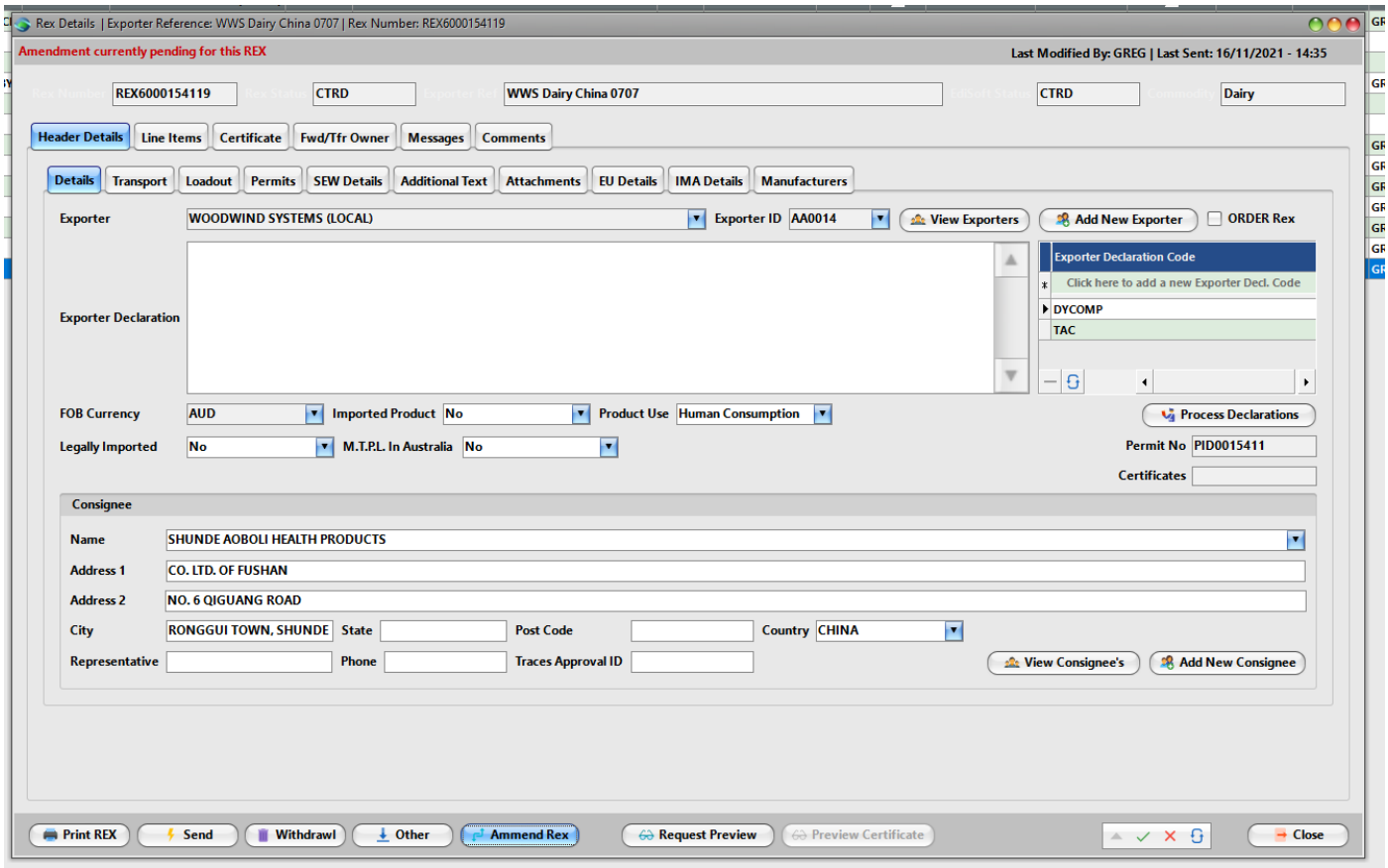
You can see that the Rex Status is CTRD and the EdiSoft Status is CTRD. The Amend Rex button is also enabled.

To Amend the restricted fields on a REX at CTRD, click on the Amend button and the following screen will appear. Enter the reasons you wish to Amend this REX.

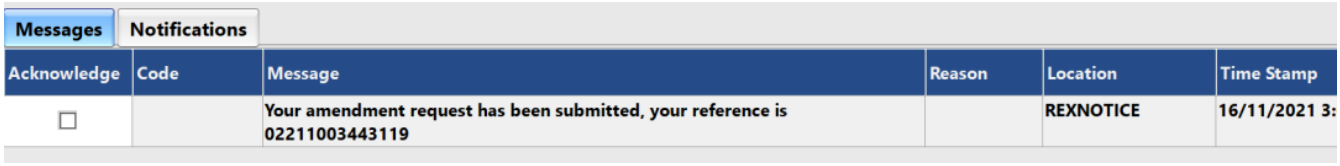


This information will be used by the person at DAWE who is Reviewing the REX.

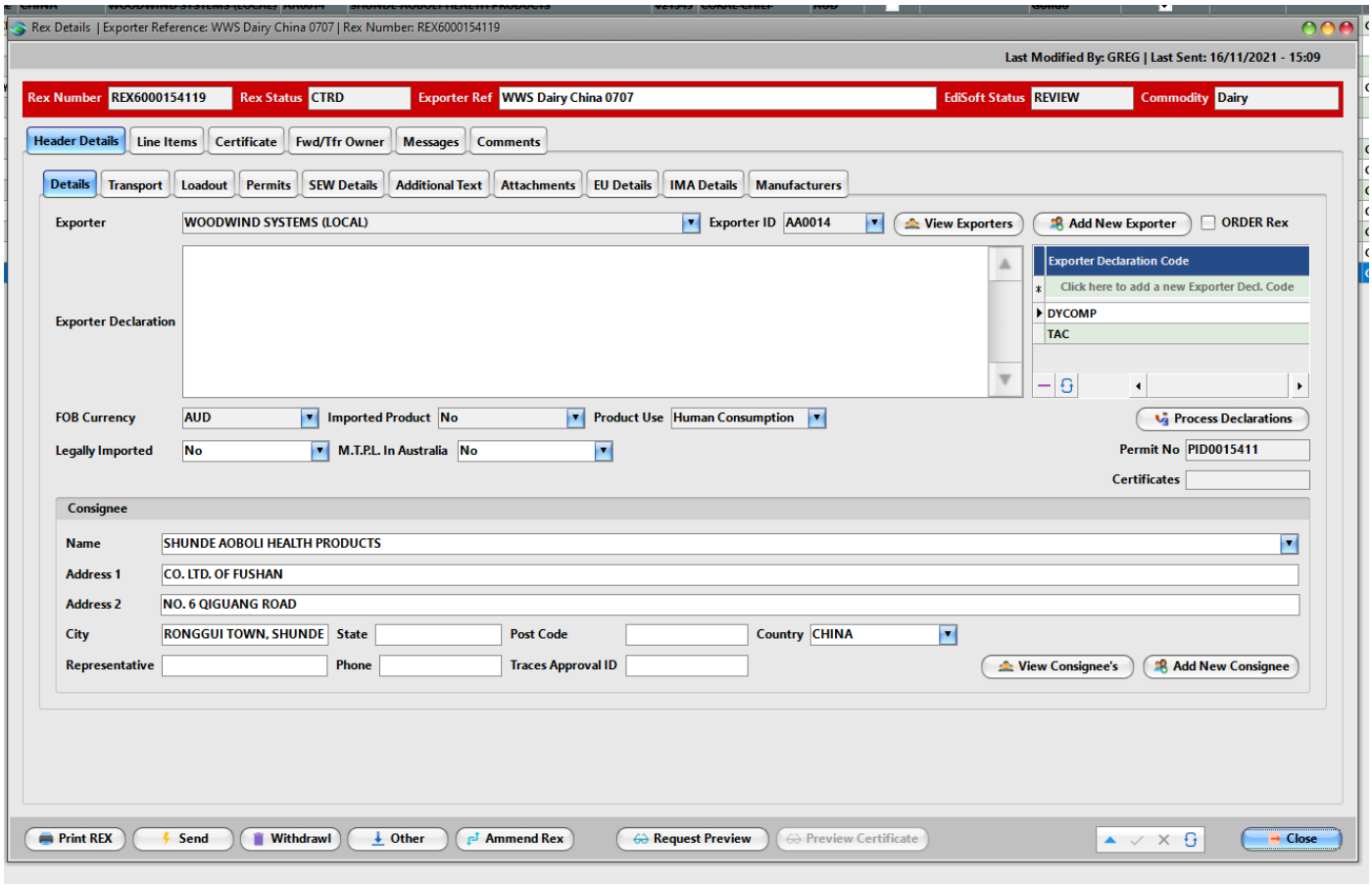
When you click OK, you will be returned to the REX Detail screen where there should be more fields enabled for you to make the required Amendments.



Once complete, click Send and you will get the following message:



The REX Detail screen now should look like this. You will notice that the REX Status is CTRD and the EdiSoft Status has changed to Review. Any attempt to change or Re-send at this stage will cause an error. When the REX has been Authorized, a Notification will be sent from NEXDOC.


Rex Details | Exporter Reference: WWS Dairy China 0707 | Rex Number: REX6000154119
Last Modified By: GREG | Last Sent: 16/11/2021 - 15:09
Rex Number REX6000154119
Rex Status CTRD
Exporter Ref WWS Dairy China 0707
EdiSoft Status REVIEW
Commodity Dairy
Header Details
Line Items
Certificate
Fwd/Tfr Owner
Messages
Comments
Details
Transport
Loadout
Permits
SEW Details
Additional Text
Attachments
EU Details
IMA Details
Manufacturers
Exporter
WOODWIND SYSTEMS (LOCAL)
Exporter ID
AA0014
View Exporters
Add New Exporter
ORDER Rex
Exporter Declaration
Exporter Declaration Code
Click here to add a new Exporter Decl. Code
DYCOMP
TAC
FOB Currency
AUD
Imported Product
No
Product Use
Human Consumption
Process Declarations
Legally Imported
No
M.T.P.L. In Australia
No
Permit No
PID0015411
Certificates
Consignee
Name
SHUNDE AOBOLI HEALTH PRODUCTS
Address 1
CO. LTD. OF FUSHAN
Address 2
NO. 6 QIGUANG ROAD
City
RONGGUI TOWN, SHUNDE
State
Post Code
Country
CHINA
Representative
Phone
Traces Approval ID
View Consignee's
Add New Consignee
Print REX
Send
Withdrawl
Other
Ammend Rex
Request Preview
Preview Certificate
Close

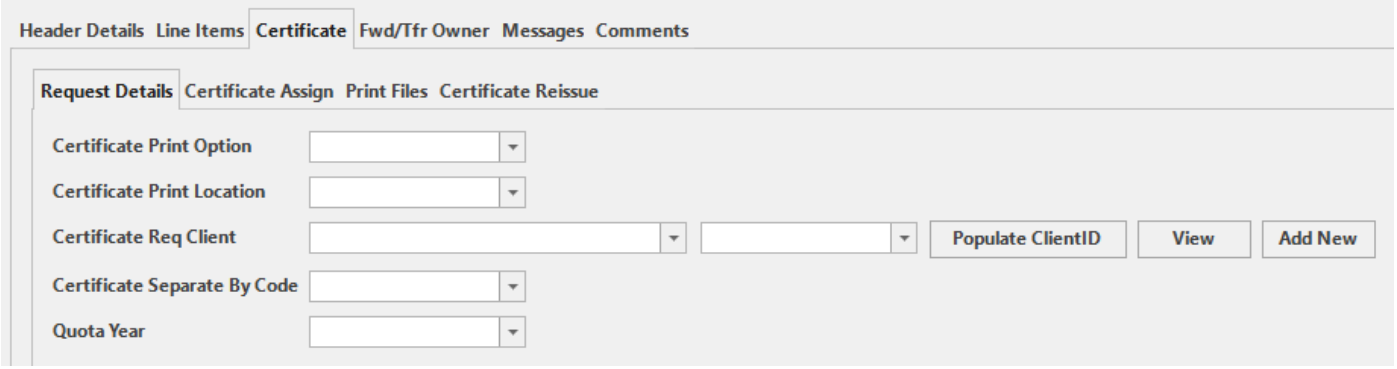
4 Health Certificates

4.1 Obtaining Health Certificates

To obtain a Certificate NEXDOC require specific information. Below we have detailed how you can enter in this information on the Certificate Tab of a REX.

Request Details Tab

See the below for details look what the following dropdowns and buttons do on the Request Details tab.



Certificate Print Option

This dropdown gives the following options that you can enter:

- Automatic
- Manual (this can be used to obtain preview certificates)
- Container
- Not required

Certificate Print Location

Use this dropdown to select the office location of where you would like your Certificate to print at. If you instead have a 'Client Group ID' for the office, you can use the 'Certificate Req Client' options instead.

Certificate Req Client

This option is the same as the 'Print Location' only using Client Group ID's instead of a location. The **Populate ClientID** button will fill enter your own Client Group ID, this is useful if you wish to print your own Certificates. Use the **View** and **Add New** to add new Client Group ID's to your list of dropdowns.

Certificate Separate By Code

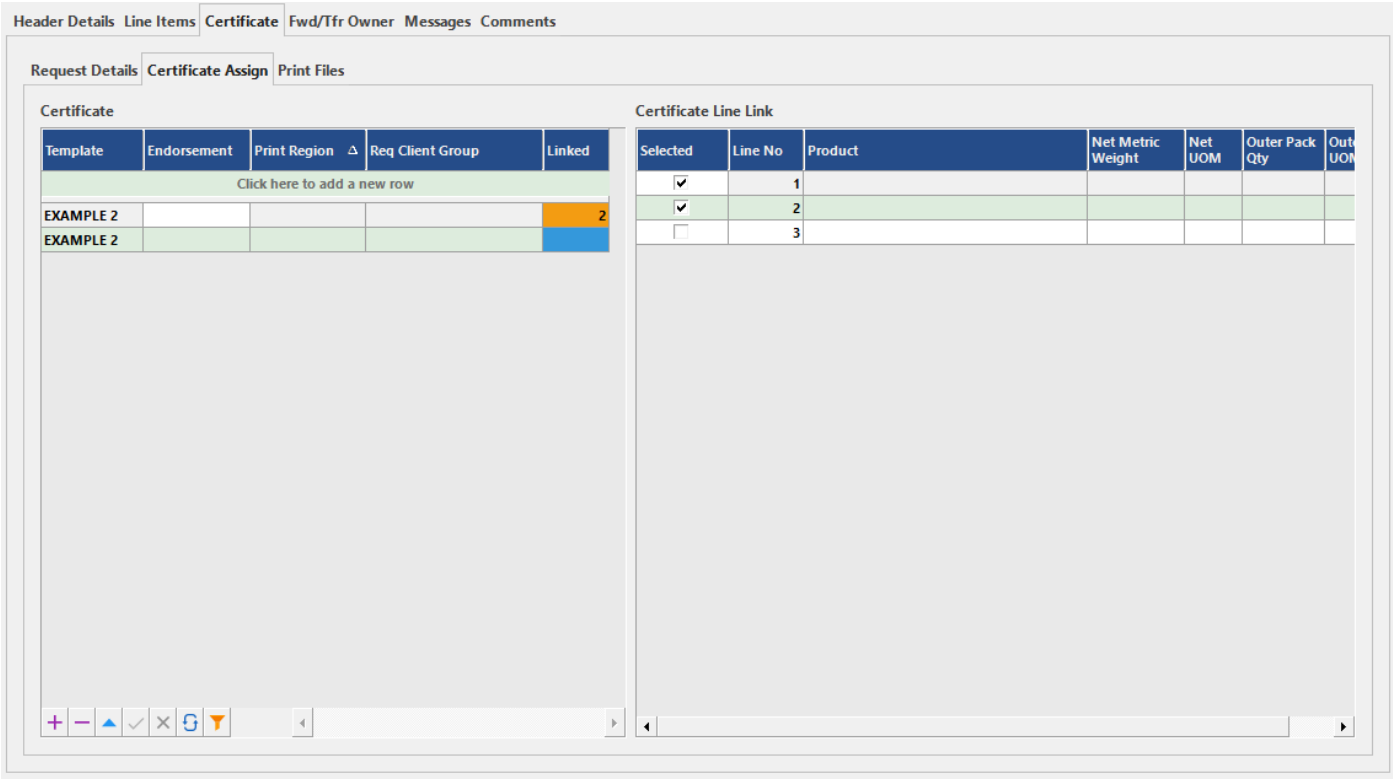
NEXDOC allow you to separate Certificates by Container, Packing Establishment or Shipping Marks, use this dropdown if you require this.

Quota Year

Enter the Quota Year for your REX here.

Certificate Assign Tab

The next Certificate tab is 'Certificate Assign'. This is where you can select what custom templates you would like to print for your Line Items.



Certificate (Left Grid)

Template

Use this column to enter your required custom certificate template.

Endorsement

Use this column to enter your endorsement code.

Print Region / Req Client Group

Use either the Print Region column or the Req Client Group column to select a Certificate Print location. (similar to how the Certificate Print Location and Certificate Req Client dropdowns work on the Request Details tab)

Linked

This field is not editable, it is here to show the amount of Line Items attached to the Certificate Template. This field is also coloured depending on the values:

Blue - If no Line Items are linked

Green - If one Line Item is linked

Orange - If multiple Line Item's are linked

Certificate Line Link (Right Grid)

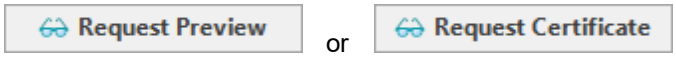
Before using this grid, first select and have highlighted a Certificate Template from the 'left grid'. This 'right grid' will now show a list of Line Items that are available from the REX.

Selected

Use this selected column to link and unlink Line Items from your certificate templates.

Requesting your certificate(s) from NEXDOC

Once you have communicated your REX with NEXDOC, you can use the following process to obtain Preview or Original Certificates:



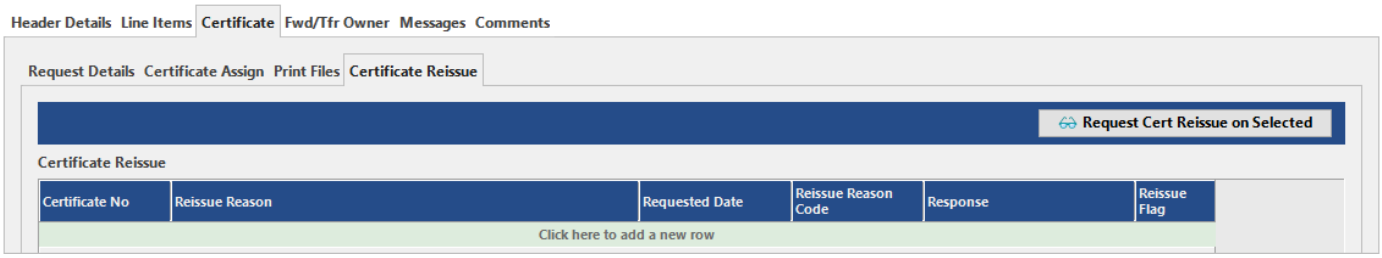
Note:

To obtain Original Certificates your REX will need to be at status 'COMP', otherwise you will only have the option to request 'Preview Certificates' provided your REX has a REX number.

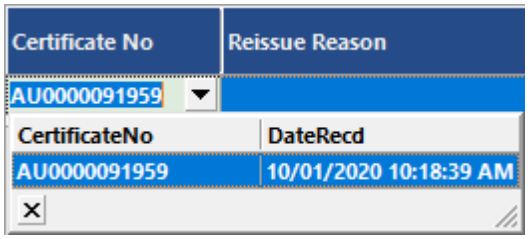
Please see the Printing Certificates section for details on how to print them.

Re-issuing Certificates

The following tab can be used to re-issue Certificates:



First select the Certificate(s) that you would like re-issued using the 'Certificate No' dropdown.



Enter in a reason and a request date.

Certificate Reissue

Certificate No	Reissue Reason	Requested Date	Reissue Reason Code	Response	Reissue Flag
AU0000091959	Enter a reason here	17/06/2020			

Click the 'Request Cert Reissue on Selected' to request the Certificate(s) that are selected in the grid

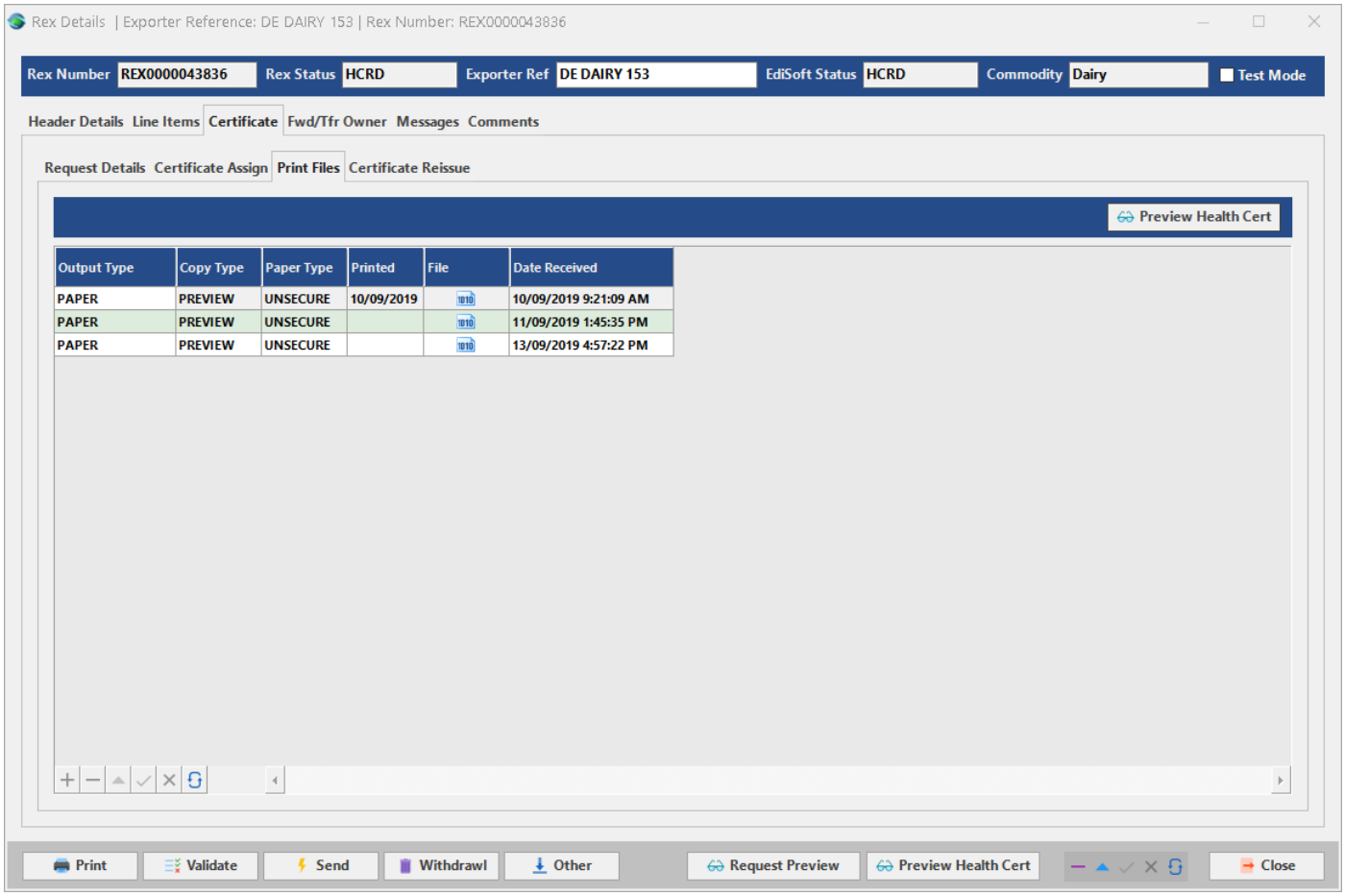
Please see the Printing Certificates section for details on how to print them.

4.2 Printing Health Certificates

There are multiple sections at where Certificates can be printed:

- From the REX Certificate tab
- From the Certificate Print form

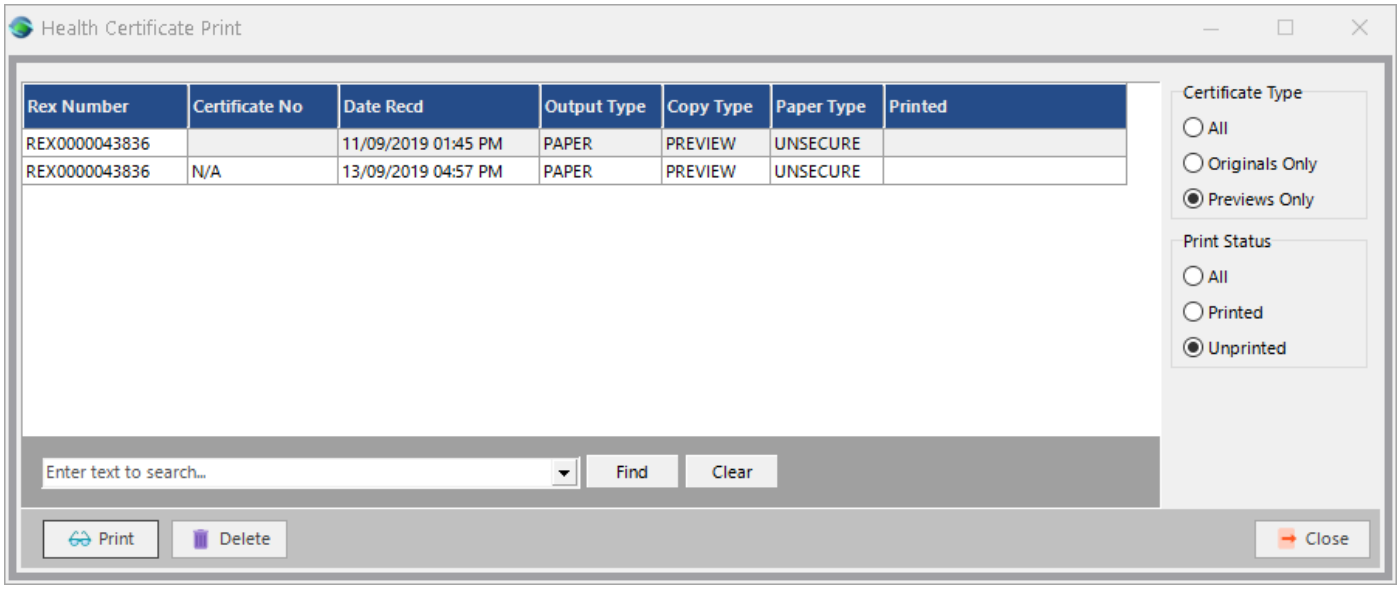
REX Certificate Tab:



This tab will show a list of Certificates for the REX that are available for printing. Certificates that have been printed will also show here, with a date of when they were printed.

Click the 'Print Health Cert' button to print a certificate.(or 'Preview Certificate' if your REX is not at COMP')

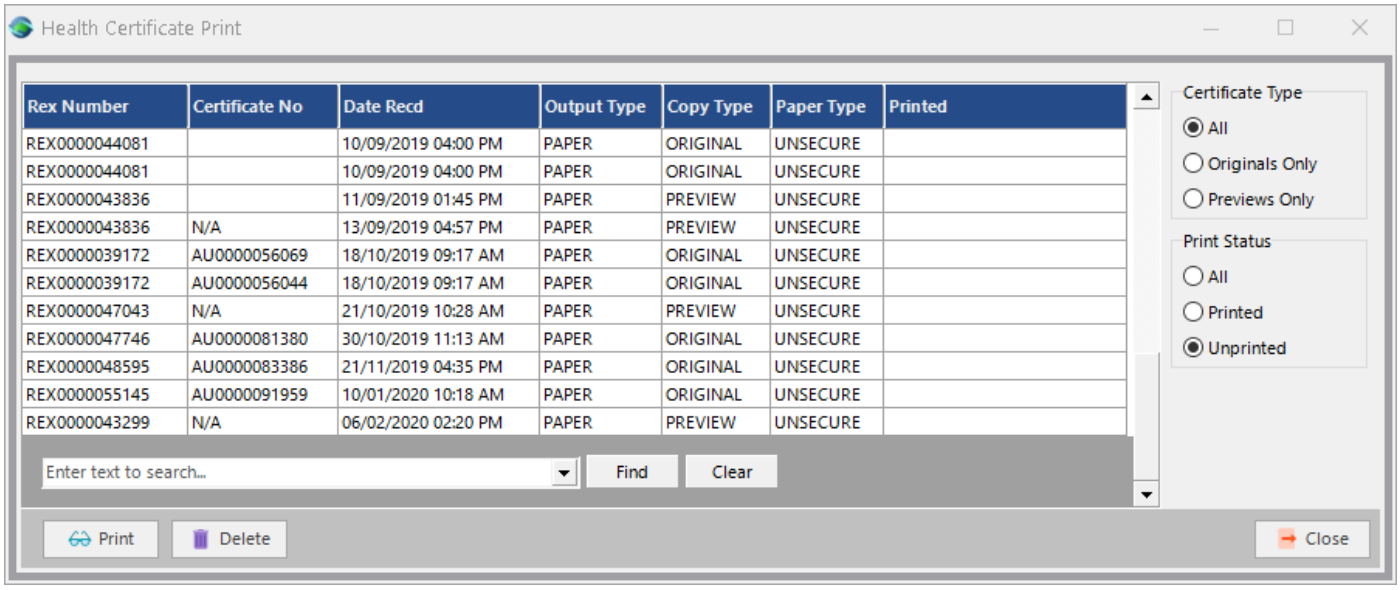
If more than one is available for printing, you will be prompted with an additional form to select the Certificate you wish to print.



You can select and print the Certificates for the REX here, or delete a certificate if you required.

Certificate Print Form:

If you wish to view or print Certificates from all your REX's, you can open this form from the REX List (by using the View Certificate button)



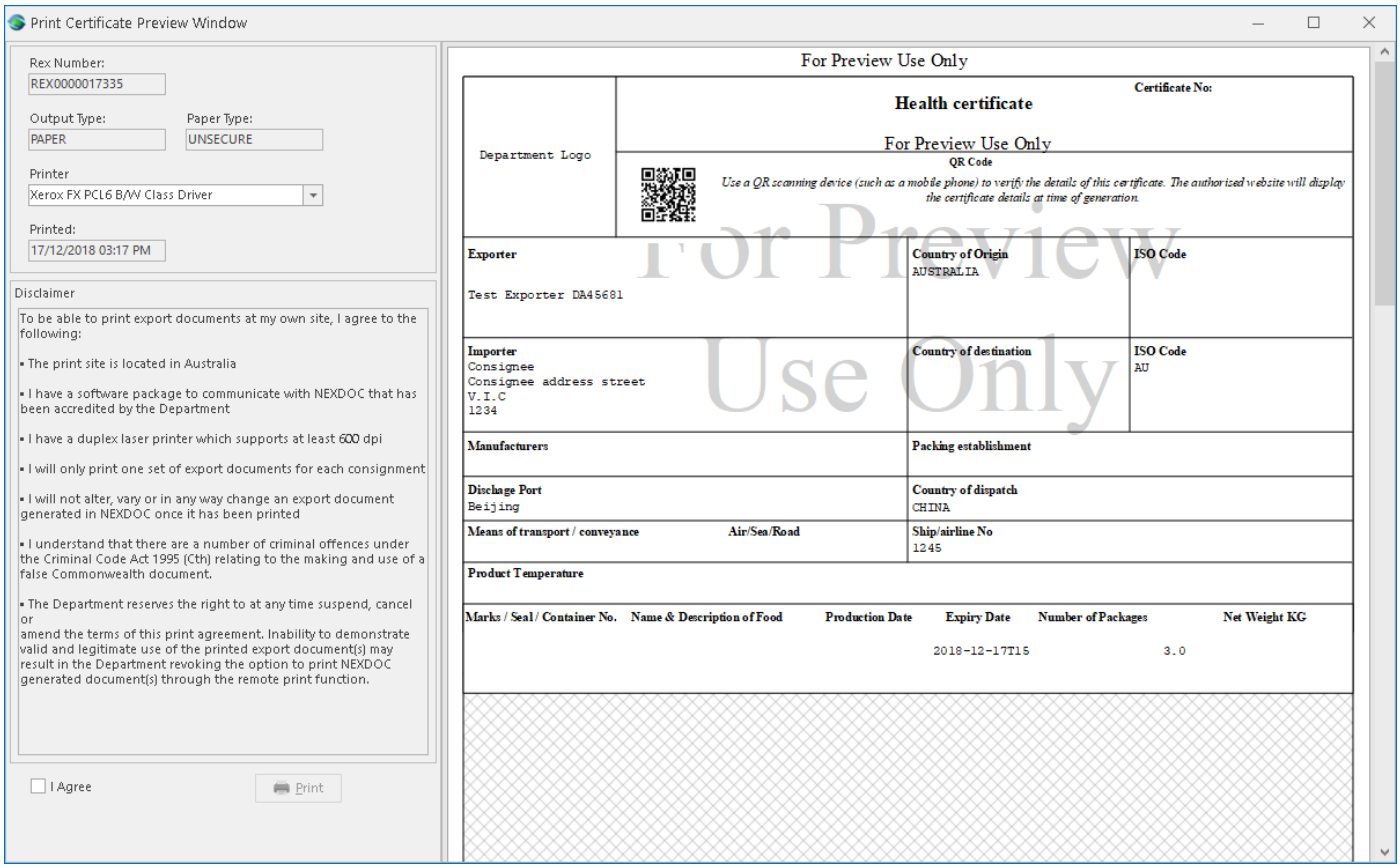
This form shows a list of all your Certificate's that are available for printing or have been printed. You can select and print the certificates you desire here, or delete a certificate if required.

You can also use the filtering options on the right to narrow down the list of Certificates you wish to view, as well as using the search feature at the bottom.

To delete multiple certificates from this list, you can select multiple by holding 'Ctrl' and clicking on rows. Alternatively, you can click 'Ctrl + A' to highlight all records, then clicking 'Delete' should remove the selected certificates.

Preview Window

Prior to your Certificate printing, you will be prompted with the below preview screen to confirm printing:



The **Printer** option lets you select your desired printer.

The **Printed** box shows a date when your certificate was printed. If no date exists the certificate has not been printed yet.

Note: If you have already printed a Certificate, you will not be able to print the same one again due to NEXDOC's security requirements. 'Preview Certificates' can be printed multiple times however.

Once you have checked your Certificate and read NEXDOCs disclaimer, tick **I Agree** and click on the **Print** button to send the file to your printer.

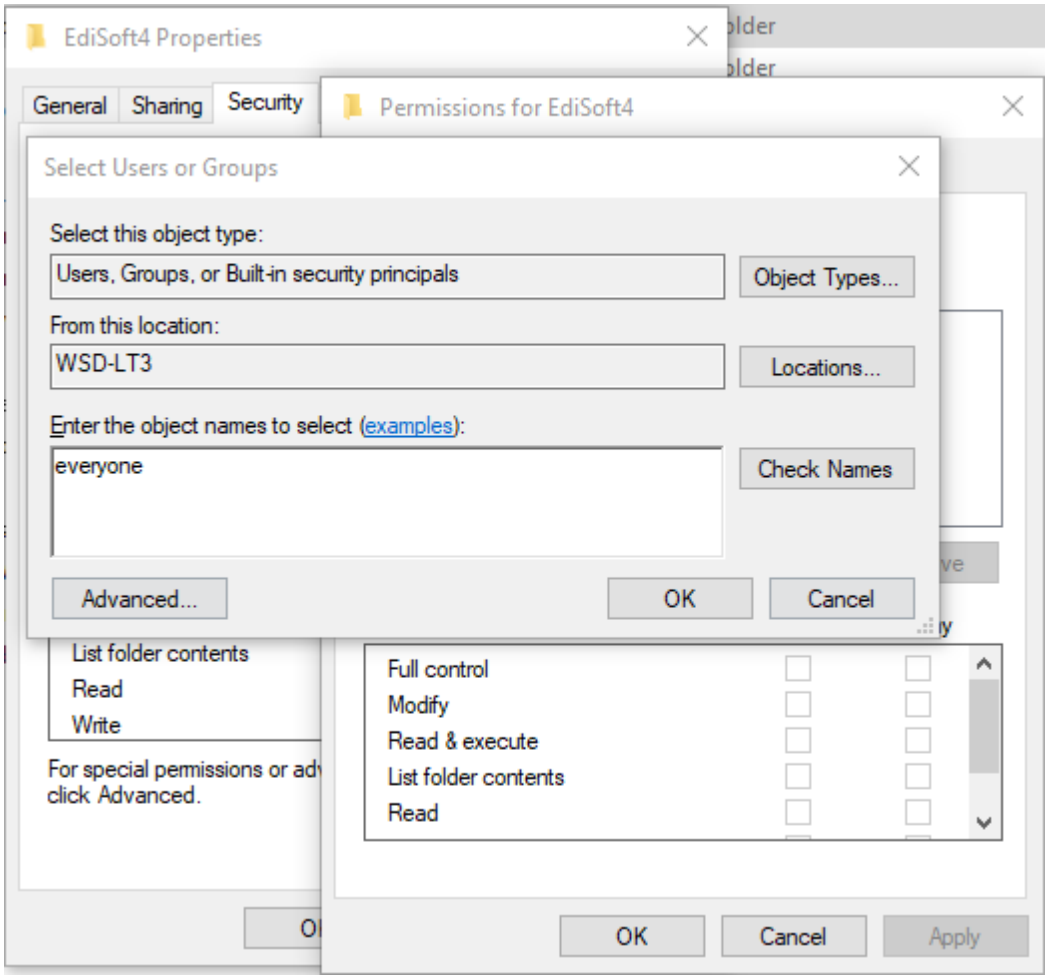
5 Troubleshooting

5.1 File Permissions

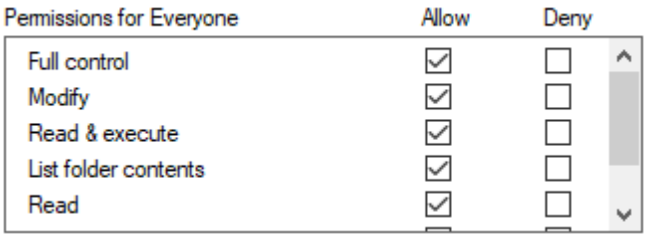
Permissions allow you to set who can access the files and in what way. When granting users access to EdiSoft all users must have "Full Control" permissions to the EdiSoft 4 install directory. Below are steps to take in order to set permissions on a folder.

Setting Permissions

1. Right click on the folder you wish to set permissions to.
2. Choose Properties
3. Go to the Security Tab
5. Click Edit
6. Click 'Add...'
7. Type 'everyone' and click OK



8. Tick Allow for 'Full Control' so the permissions look like the below and click 'OK'



9. Click 'OK' again to close the properties box

6 Data Maintenance

6.1 Check Database Structure (Reindex Database)

The normal operation of a computer can cause database indices to become corrupted. The causes can be many, but one is bad power supply. Another happens when the user switches off the computer without shutting down Windows correctly. This corruption results in files being linked incorrectly and thus unpredictable results. If ever you are having unexplained problems you should run this function.

This is something you could do on a regular basis. (i.e. After a backup).

This is something that could occur after a software update. Where there are changes to the database structure (generally for new fields from DAWR) then EdiSoft will detect the change and a Database Integrity Check will be initiated. EdiSoft will not run until the restructure has been done.

To run this you must have exclusive use of the system. If there are other users (on the network) then you will be warned of this and the process will not run.

The steps we recommend to perform are below:

1. Close out all users from Edisoft
2. Run a full backup (click housekeeping -> backup)
3. Once the backup is complete click housekeeping -> Check Database Structure (Integrity Check)

6.2 System Backup

Backup is one of the most important things to remember with any computer installation and yet it is the thing that is most frequently ignored. Backup is a copy of your data that can be used to recover from a disaster, theft etc.

Your computer systems must be backed up on a regular basis. In the case of data corruption, disk failure, natural disaster, theft etc. it will be necessary to restore the last backup. This will restore your system to the status at the time of the last backup. Obviously, the more recent the Backup, the more up-to-date your restored data will be.

The Backup method will vary depending on Operating System, if you are on a network, who is doing the backup or some other requirement. The main thing is that it must be done.

To simplify any recovery you should backup the following

....\EdiSoft4\Data directory (assuming you installed to the default directories).

There is a Backup facility in the Housekeeping Menu within EdiSoft. With this you can:

- Backup the whole of the Woodwind Directory (recommended)
- Backup the Data Directory only. Do this to have the latest copy of your data backed up. If you are experiencing hardware problems, or power supply problems, do this often. We can use the most recent backup to get you going again with the least delay.

In the event of data corruption (or a theft of your computer) you can then restore from your backup.

6.3 Moving Edisoft

Here is a list of transfer methods for moving EdiSoft to a new machine.

Note: We recommend performing a full backup to an alternative media before moving Edisoft to a new location.

Note: *Keep in mind that if you use EDN's you will have digital certificates on an existing machine. The Authorised Officers (AO) digital certificate and Device (Type III) certificate should be backed up and moved to a new machine so you are able to access Verisign and send EDN's from EdiSoft in future.*

Note: When transferring EdiSoft you can transfer using a USB Stick or via the Network, or any method that you wish.

(Note, if burning to CD when extracting back off the CD the files may be marked as read-only. Please ensure that you turn off read-only attributes if using CD to move or restore data).

For Server Setups

Server setups are when the files are located on one machine, and there are other machines that use EdiSoft. This can be either when a dedicated file server is being used to host the files, or when two computers are sharing the same Edisoft information. (Peer-Peer Network).

On the Server

1. Move the EdiSoft4 directory and contents from the old server to the new server.
2. Ensure that the EdiSoft4 Directory is shared, or uses are able to access the new location across the network. (The share must have Full Access and not just read permissions too).
3. Ensure that the EdiSoft4 folder and contents (including subdirectories) has permissions set for full access. (Read/write permissions isn't enough) For more information see the Permissions section in the Appendix of the EdiSoft manual.

On the Workstations

1. Using File explorer on the workstation, locate and navigate to the EdiSoft4 directory on the server.
2. Run the LocalInstall.exe file
3. After the setup process has finished run EdiSoft.
4. Repeat steps 1-3 for all other computers.
5. Once you have finished the transfer and confirmed that everything is working correctly you can remove EdiSoft from the old server if not yet done to avoid confusion.

For Single Installations / Standalone Transfer

Single Installations are when Edisoft only runs on one computer, and the files are stored on the same computer. No network activity is included.

1. Move the EdiSoft4 directory and contents from the old computer/server to the new computer/server.
2. Ensure that the EdiSoft4 folder and contents (including subdirectories) has permissions set for full access. (Read/write permissions isn't enough) For more information see the Permissions section in the Appendix of the EdiSoft manual.
3. Run the LocalInstall.exe file
4. After the setup process has finished run EdiSoft.
5. EdiSoft should now be moved to the new computer/server. Once you have finished the transfer and confirmed that everything is working correctly you can remove EdiSoft from the old computer/server if not yet done to avoid confusion.