CLIENT ACCESS GUIDE

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WILLIAMS CLIENT ACCESS

To automate your data management program, Williams offers access to a customized, online interface to simplify and enhance your account experience. Williams Client Access allows users to add, edit, order & access their entire inventory online. It is our goal to transition our clients from users to data management experts and Williams Client Access puts you one step closer!

FEATURES

- Quick Search
- Advanced Search
- Export reports
- Place your order

- Add new inventory
- Edit existing inventory
- Order tracking
- Other Services requests

❖ *ADDING NEW INVENTORY*

The Web allows users to add new inventory to their Williams Data Management account online & eliminates the need for a Container Transmittal Form.

How to Add New Containers
- Under the "Inventory" menu, click on "Containers."
- Go to "Options" at the top of the Inventory grid to highlight and select "Add."
- In your Add Screen, fill in all required fields. Note: each company is unique. You may need to consult with your organization's records information management & retention policy contact prior to entering your descriptive data.
- When data entry is complete, click "Submit." If you have multiple boxes to add, repeat process. When finished, click "Back to Results" and your active grid showing all pending boxes populates.

Data Entry Fields
- Account: Your 5-digit account number auto-populates. If you have a departmental account, the 2nd account field with a drop down option will be active.
- Williams Barcode: Container barcode label provided by Williams.
- Alternate Code: This is a unique, alphanumeric field used as a secondary barcode or key identifier for a container.
- Destroy Date: Calendar driven field.
- Sequence Begin: 30 character alphanumeric descriptions field; indicates the beginning of a set of files in a container.
- Sequence End: 30 character alphanumeric descriptions field; indicates the end of a set of files in a container.
- From Date: Calendar driven field indicating the beginning of a time period.
- To Date: Calendar driven field indicating the end of a time period.
- Description: Alphanumeric field. User may enter up to 250 characters laterally and then click "enter" and repeat multiple times.
- Contents: Alphanumeric field. User may enter up to 250 characters laterally and then click "enter" and repeat multiple times.

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❖ **SEARCHING**

Users can search existing inventory at Williams Data Management in two ways.
1. Quick Search, which allows you to use predefined search criteria.
2. Advanced Search which allows you to create your own search criteria.

Quick Search: A basic search function with limited value criteria
- From the "Inventory" menu and "Container" grid or "Filefolder" grid, select the "Search" menu and click on "Quick Search."
- Select the query from the list provided in the drop down box. The description drop down box provides additional information about the selected query.
- Enter your data.
- Click search.

Advanced Search: A more extensive search function with many value options
- From the "Inventory" menu and "Container" grid or "Filefolder" grid, select the "Search" menu and click on "Advanced Search."
- Enter the criteria for the search by selecting the Field (1st drop down box starting with "barcode") and the Operator (2nd drop down box starting with "is equal to").
- Use the "Add" button to search for multiple items within a field, such as barcode or alternate code. The "Remove" button to remove any items.
- To search by the description or contents field:
  - Select the Operator:
    - "Is Equal To"- will match the selected field exactly.
    - "Contains"- exists anywhere in the selected field.
    - "Begins with"- begins with the entered value.
  - Enter the value and click on "Add More" to add other criteria, repeat the steps until all values have been entered.
- Click the "Submit" button to run the search.

❖ **EDITING INVENTORY**

This function allows users to update & view the data associated with an existing container in inventory.

- From the "Inventory" menu and "Container" grid, search for the item to be edited. User may use either "Quick Search" or "Advanced Search."
- When search is complete, containers appear on Inventory grid.
- To edit item, either double-click on the container row or go to "Options" and click "Edit."
- The default edit form is displayed.
- Edit the field and click "Submit" to update the data.

❖ **PICKUP WORKORDERS**

This function allows users to schedule to have their items picked up and stored at the Williams Data Management Records Center.

- Under the "Order" menu, click on "cart."
- Go to "Add to Cart" & select "Bulk Items."
- Service Type should be Pickup
- Enter the total number of containers and/or files to be picked up by Williams Data Management.
- Optional Comment regarding pickup of containers and/or files.
- Select "Add to Cart" button on bottom of screen.
- While in your "Cart," all items selected (BLUE) will be added to Workorder. The service type reflected is "Pickup."
- Go to "Checkout" and click "Workorder."
- The Webpage will ask you to confirm your quantity of containers selected from your Cart. Click "Ok."
- Your Workorder screen appears. Make sure that your contact name and address are correct. If not correct, make the change and then select the checkbox that says: "Use the same account and address the next time an order is created." This information will automatically populate next time an order is placed online.
- Select your "Service Priority." For all pickup orders, select "Pickup, Regular.
- Enter your First Name, Last name and password. This password refers to the password listed on the Authority for Access Form connected to your account.
- To complete, click "Create Workorder."
- A summary page appears. You may print this for your records if desired.

❖ **DELIVERY WORKORDERS**

This function allows users to schedule to have items stored at the Williams Data Management Records Center delivered to them.

Retrieving Container(s) in Storage
- Under your "Order" menu, select "Cart."
- Go to the "Add to Cart" button.
- Highlight "Items." Select "Enter Items" or "Search & Select" button.
  - Enter items is used when user have the exact barcode to enter.
  - Search & Select is used when user must locate containers and then add to cart.
- If you use "Enter Items," enter the barcode in each field and when completed select next
  - Complete the required fields. "Service Type" should be "Deliver."
  - Enter your Requestor name and any comments associated with the Delivery.
  - Click "Add to Cart." Then click "View Cart" to verify your new items in the Cart.
- If you use "Search & Select," click on Container and conduct your search.
  - When all items are in your "Container" grid, select all items you want for Delivery.
  - Go to "Options" and click on "Add to Cart." This will take you to the "Add Items to Cart" screen.
  - Choose your service type to reflect "Deliver."

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- Enter your Requestor name and any comments associated with the Delivery.
- Click "Add to Cart." Then click "View Cart" to verify your new items in the Cart.
- While in the "Cart," select all items that you would like to check out (make the row BLUE). Please note that each Workorder should reflect the same "Service Type."
- Go to "Checkout" and click "Workorder."
- The Webpage will ask you to confirm your quantity of containers selected from your Cart. Click "Ok."
- Your Workorder screen will appear. Make sure that your contact name and address are correct. If not correct, make the change and then select the checkbox that says: "Use the same account and address the next time an order is created." This information will automatically populate next time an order is placed online.
- Select your "Service Priority."
- Enter your First Name, Last name and password. This password refers to the password listed on the Authority for Access Form connected to your account.
- To complete, click "Create Workorder."
- A summary page will appear. You may print this for your records if desired.

❖ *<u>EXPORTING</u>*

This function allows users to create an excel version of any active grid on Williams Client Access. Your Container, Filefolder, Cart & Order Status grids are all export ready.

How to Generate Your Entire Inventory:
- From the "Inventory" menu, click on "Container."
- Go to the "Search" tab & select "Advanced Search."
- Set the search criteria to "Barcode" and "Begins With."
- Type the letter "C" in the search box & then click "Add."
- Click "Search." This populates your entire inventory as blue (active) rows on the grid.

Exporting Your Inventory:
- Go to the "Options" tab and select "Export."
- Click "Download."
- When pop-up appears, click "Save."
- On next screen, change the following criteria:
  - File name to include: ".csv" at the end of the file description.
  - Save as type: "all files."
- After export is complete, click "Back to Results" and clear your grid.

Exporting All Grids:
- Go to the "Options" tab and select "Export."
- Click "Download."
- When pop-up appears, click "Save."
- On next screen, change the following criteria:
  - File name to include: ".csv" at the end of the file description.
  - Save as type: "all files."
- After export is complete, click "Back to Results" and clear your grid.

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❖ *REPORTS*

Container OUT Status Report
- From the "Inventory" menu and "Container" grid or "Filefolder" grid, select the "Search" menu and click on "Quick Search."
- Select the "Item Status (OUT)" query from the list provided in the drop down box. The description drop down box provides additional information about the selected query.
- Click search.

Destruction Eligibility Report
- From the "Inventory" menu and "Container" grid or "Filefolder" grid, select the "Search" menu and click on "Quick Search."
- Select the query "Destruction Eligibility Report" from the list provided in the drop down box. The description drop down box provides additional information about the selected query.
- Enter the destruction date. This query will produce only boxes eligible for destruction "on or before" the date entered into the search field.
- Click search.

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