Client User Guide

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RSWeb Overview

Overview

Welcome to RSWeb, the Record Storage World Wide Web access tool. With RSWeb, you have control over your own stored records – even though they are stored off-site. RSWeb allows you to access your record center's RS-SQL® database and perform many tasks yourself, eliminating telephone calls and miscommunications. Through RSWeb and your Internet connection, you can now order services, check the status of your orders, and update the information associated with your stored items.

NOTE: RSWeb can be accessed by any computer using Microsoft Internet Explorer 6.0 or above.

Logging In

Security is important to you and your records. RSWeb respects that and requires that everyone who logs in have a current User Name and Password. These names and passwords are set up through your record center.

Enter your User Name and Password in the appropriate fields.

If the Remember Me check box is selected and the login is successful, the User Name is remembered the next time the login screen is opened. The Remember Me check box remains checked.

If the Remember Me check box is cleared, and the login is successful, the User Name field will be blank the next time the login screen is opened.

If you clear the fields, but do not login as a different user, the last User Name logged in will appear the next time the login screen is opened. If the last user logged in goes 14 days without logging in again, the Remember Me option expires and the User Name field will be blank.

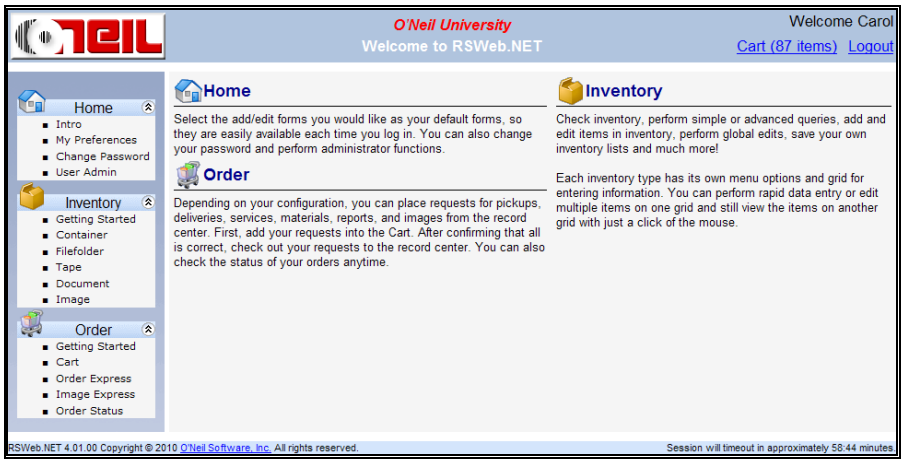
If more than one language is available, click the drop down arrow next to the language field to select the desired language. Click the **Login** button.

If the Terms and Conditions feature has been set up by your record center, when you enter your User Name and Password and click **Login**, the **Terms and Conditions** page appears.

After you have reviewed the Terms and Conditions, select the Accept Terms and Conditions check box, and click **Continue**. You will be taken to the **Home** page. Once you have accepted the Terms and Conditions, you will not be asked again the next time you log in.

If you do not accept the Terms and Conditions, click **Do not accept**. You will be taken back to the **Login** page. You will not be able to log in until you accept the Terms and Conditions.

Once you log in, the main screen appears. Menu options display along the left side of the screen.



The welcome message at the top right corner of the screen uses your first name. The tool tip of the welcome message displays your user code and also indicates if you are a web administrator.

The cart link in the top right corner shows the number of items in your cart and provides a quick navigation to the **Cart** page.

Home

From the **Home** menu, you can read an introduction of RSWeb, determine your default forms for data entry, and change your password. If your record center has set up a User Administrator, you can also set up new users and determine which areas of RSWeb they can access.

Inventory

Through this option you can access your existing stored items and actually update information associated with them. You can also add new items to the system.

Order

Any time you need to have something delivered from the record center or have something picked up by the record center, you can order the appropriate service here. Schedule orders for specific items, schedule pick ups of new items, order supplies, order reports, or other services (copying, faxing, etc.). Items are placed in the cart and when you are ready, you can place an order. You can then check the status of all existing orders. You can also place quick orders using Order Express and Image Express.

Time Out Feature

RSWeb has a built-in time out feature. A timer displays at the bottom of each page to reflect the approximate time before the session will timeout if no activity occurs. The timer counts down in 15-second intervals. When it gets down to five minutes, the text turns maroon and it begins counting down every second. When the timer reaches zero, the text turns red and changes to "Session has timed out. Please log in again." You will be required to log in again in order to continue working.

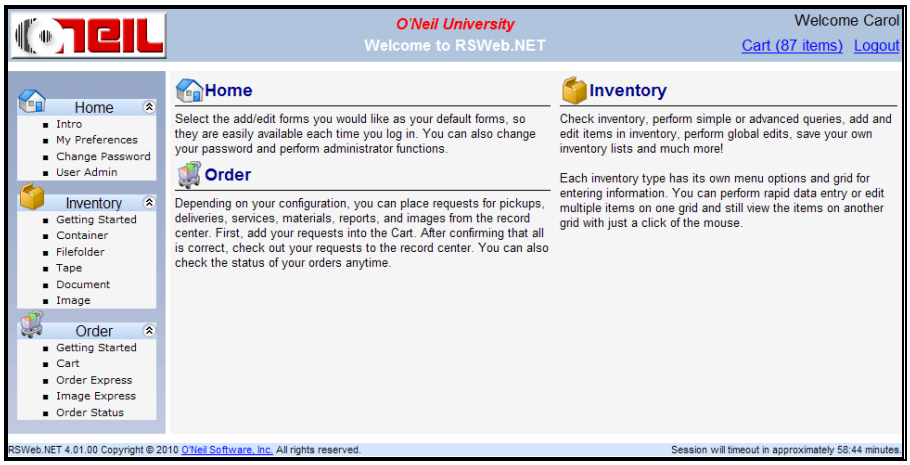
Logout

The Logout link in the top right corner allows you to log out of RSWeb when you are finished.

Home

Introduction

The **Intro** menu option is considered to be the home page of RSWeb. It is the page that displays when you log in to RSWeb. It gives a brief overview of RSWeb.

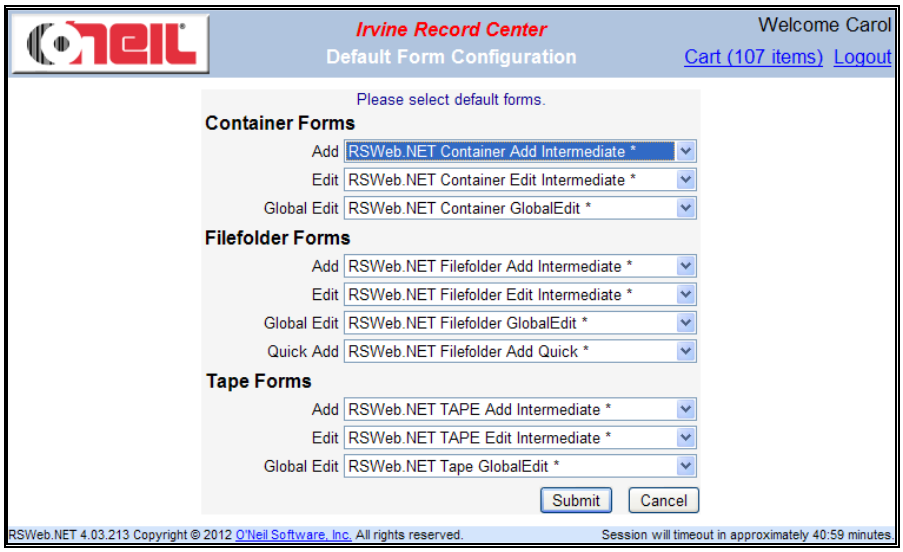


Data Entry Form Preferences

Forms are used for inputting data when you are adding or editing items. The **My Preferences** menu option is used to set the default forms that appear. Your record center may have set up custom forms for you. If so, they are available to select. If your record center has not set up any additional forms, the only choice available is the default form.

NOTE: This feature determines the form that first appears by default. If additional forms are available, you can always switch to another one before entering data.

From the **Home** menu, select **My Preferences**. The following screen appears.



For each of the fields, use the drop down arrow to make your selection. Where there is only one choice available, the field is grayed out. When you have finished, click **Submit**.

Change Password

The **Change Password** menu option allows you to change your own password.

From the **Home** menu, select **Change Password**.

The User Name field is automatically populated and grayed out. Enter your Old Password. Next, enter your New Password and type it again to confirm. Click **Change** to change the password.

User Admin

User Admin allows an administrator (set up by your record center) to do the following:

- add/modify users
- add/assign model users
- deactivate users
- delete users with no activity
- modify function access

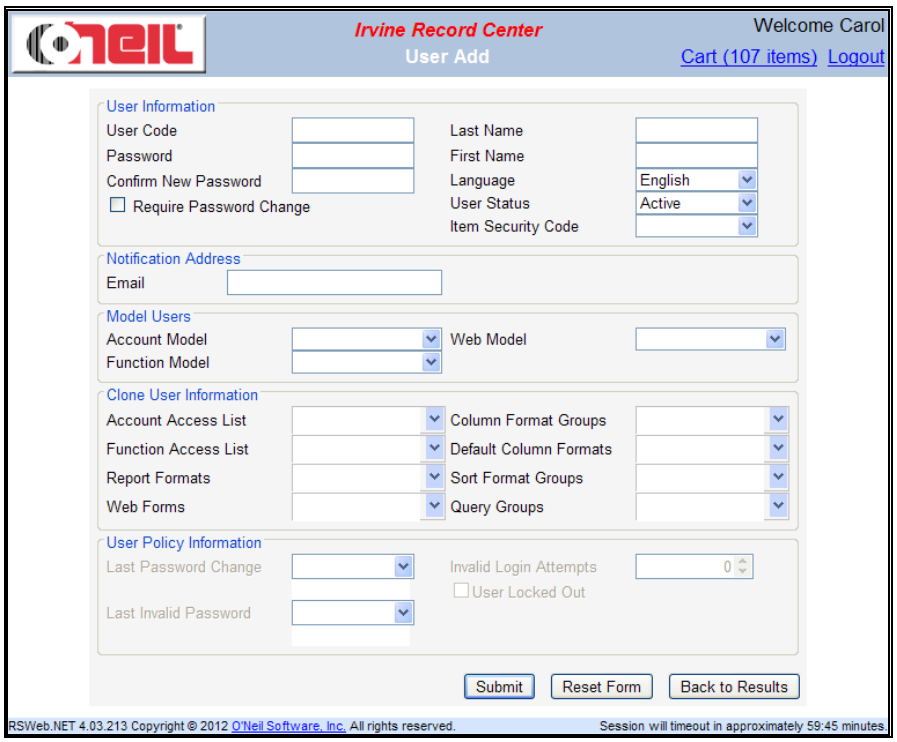
- modify account access
- modify available reports

From the **Home** menu, select **User Admin**.

Add a User

NOTE: Only a Web User Administrator can add new users.

To add a new user, from the **Options** menu, select **Add**.



User Information

User Code: Enter a code that the system will use to identify the user. It must be unique in the record center's RS-SQL database. This is what the user will type when logging into the system. This is a required field.

Password: Enter the password the user will type to login. This is a required field.

Confirm New Password: This field allows you to re-type the password to make sure you didn't inadvertently type a wrong character. If you enter different characters in the Password and Confirm New Password fields, the system warns you when you click **Submit**. This is a required field when the Password field has been changed.

Require Password Change: If selected, the next time the user logs into RSWeb, they will be prompted to change their password. They must change their password to continue. When selected, any existing password policies are ignored for the password entered by the Administrator. However, the new password entered by the user will need to comply with the password policies.

Last Name: Enter the last name of the user. This is a required field.

First Name: Enter the first name of the user. This is a required field.

Language: Select a language for the user. Depending on what your record center has set up, there may be only one language available.

User Status: Select whether the user is Active or Inactive. This is set to Active by default when adding a new user.

Item Security: Select the item security code to assign to the user. To access an item, the user's item security code must match or exceed the code assigned to the item. The Administrator can only select item security codes that are equal to or lower than what they themselves have.

Email: Enter an email address for the user (optional).

Model Users: To have this user reference a model user, click the drop down arrow and select a model user. Referencing a model user means the attributes of the model user will apply to this user.

Three separate categories are available for referencing. This allows you to assign a different model user to each category, or to assign a model user to some but not all of the categories.

Account Model: includes account access, which determines what accounts the user will have access to.

Function Model: includes function access, which determines which features of RSWeb the user will have access to.

Web Model: includes forms, column format groups, sort format groups, web query groups.

Unlike cloning, which copies this information from one user to another, referencing a model user means if a change is made to the model user, it is automatically made to any user that references that model user.

NOTE: This field is only visible if a model user has been created.

Clone User Information: This section allows you to clone user access information from another user. This can save you a tremendous amount of time. Even if the

access you want to give a user is slightly different, it may still be faster to clone from another user, and then make your changes.

NOTE: If information is originally cloned and then a model user is selected, the cloned information is saved. It is ignored, but saved so that if the model user is ever unselected, the user then reverts back to the cloned settings.

Account Access List: Account Access determines what accounts the user will have access to. Click the drop down list to select a user to clone account access from. Only users the Administrator has access to appear in the list. If none is selected, the new user will not have access to any accounts.

Function Access List: Function Access determines which features of RSWeb the user will have access to. Click the drop down list to select a user to clone function access from. Only users the Administrator has access to appear in the list. If none is selected, function access is set to No for all functions.

Report Formats: Report Formats include all the information that is determined when you print a report, such as Printer Setup, Sort Order, and Column Format. Click the drop down list to select a user to clone report formats from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any reports.

Web Forms: Web Forms are all the custom data entry forms available to the Web user. Click the drop down list to select a user to clone Web forms from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any forms.

Column Format Groups: Column Formats determines which columns appear in grids. Click the drop down list to select a user to clone column format groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default column format.

Default Column Formats: Default Column Formats determines which column format to use as the default if more than one format exists. Click the drop down list to select a user to default column formats from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default column format.

Sort Format Groups: Sort Format determines the order in which data is sorted in grids. Click the drop down list to select a user to clone sort format groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default sort format.

Query Groups: Query determines which search queries are available to the Web user in each grid. Click the drop down list to select a user to clone query groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any queries.

User Policy Information: This section displays information that is specific to password policies. If the User Policy setting is disabled by your record center, this section will be grayed out and you cannot edit it.

Last Password Change: Displays the last time the user's password was changed.

Last Invalid Password: Displays the most recent date/time that an invalid password was entered by the user.

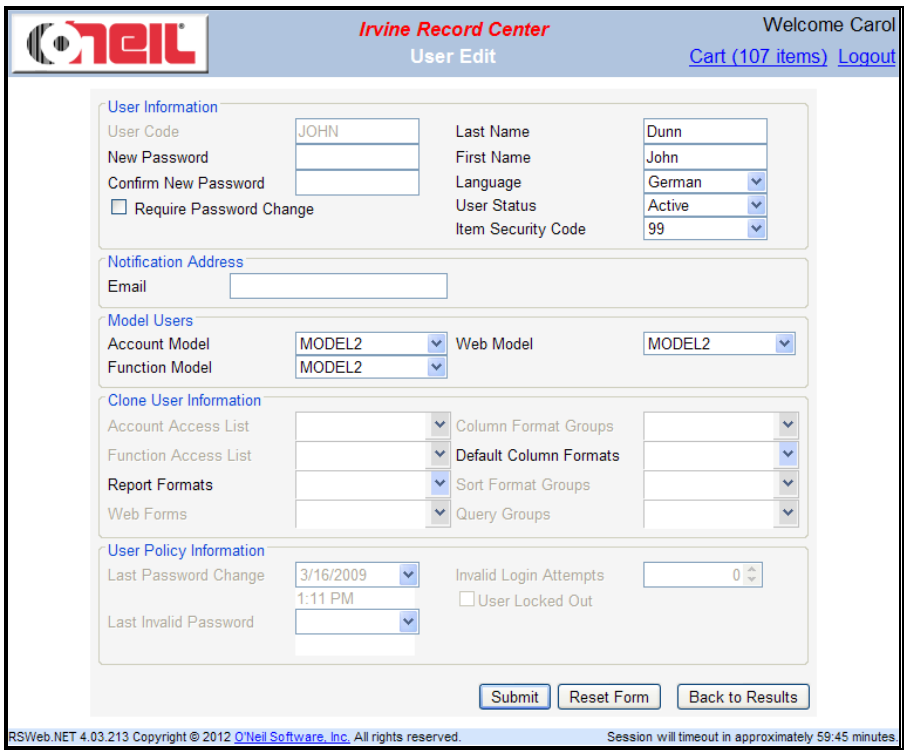
Invalid Login Attempts: Displays the number of consecutive invalid login attempts. It is set to zero if the most recent login attempt was successful.

User Locked Out: This is automatically set if the user violated the Lockout Policies set by the Record Center. If a user is locked out, clear this check box to unlock them.

Once the fields are completed, click **Submit** to save the new user.

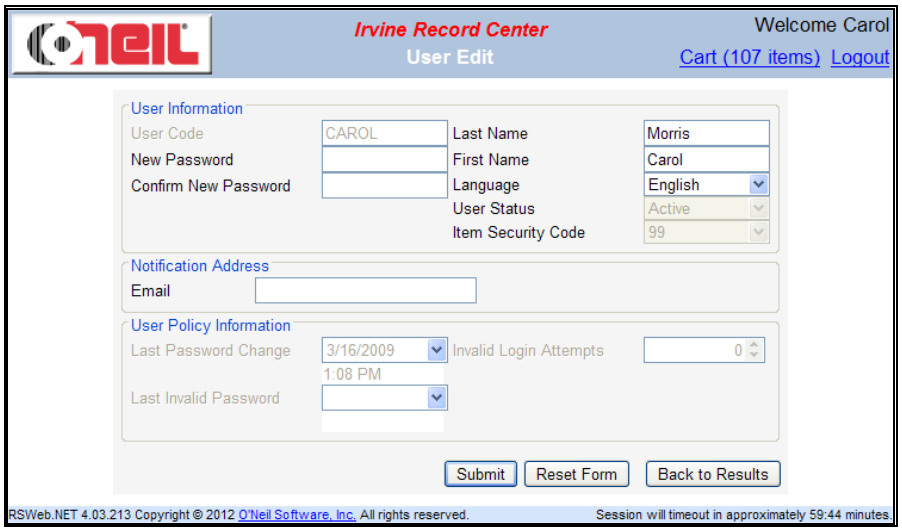
Edit an Existing User

To edit an existing user, load the user onto the grid and from the **Options** menu, select **Edit**.



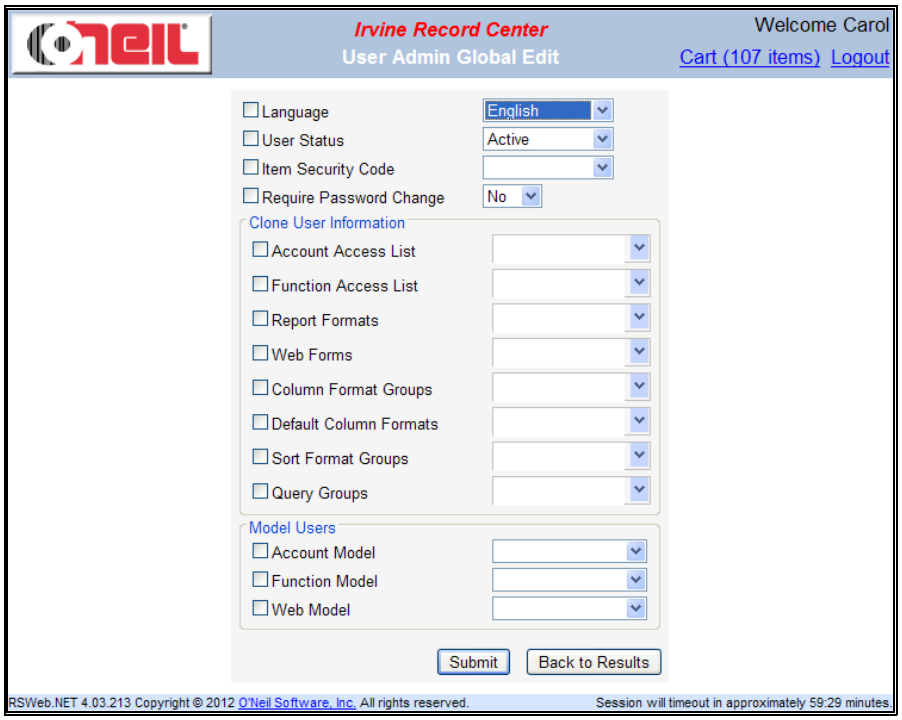
Make the desired changes and click **Submit**.

When an administrator edits their own record, some fields are unavailable.



Global Edit Existing Users

To edit several existing users at once, load the users onto the grid and from the **Options** menu, select **Global Edit**. The User Admin Global Edit form appears.

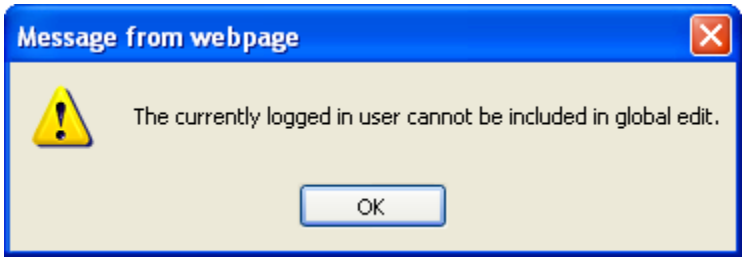


NOTE: A limited number of fields are available for global edit.

Make the desired changes and click **Submit** to save.

NOTE: You cannot global edit the Clone User Information section for a user that references a model user. If such a user is in your global edit list, you will receive a warning message letting you know.

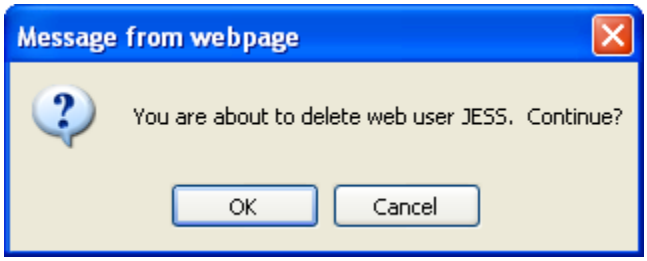
The user logged in cannot include themselves in a global edit. If the Administrator is selected in the **User Admin** grid, when **Global Edit** is selected the following message appears.



Click **OK** and the User Admin Global Edit form appears. Changes are applied to all selected users except the user logged in.

Delete an Existing User

To delete an existing user, load the user onto the grid and from the **Options** menu, select **Delete**. The following message displays.



Click **OK** to delete the user.

NOTE: The Administrator cannot delete themselves from the RS-SQL database, and they can only delete users that have not yet performed any work. Users that have performed work cannot be deleted from the **User Admin** grid. To ensure these users cannot log in to RSWeb, they should be set to Inactive in the **User Edit** dialog.

Add a Model User

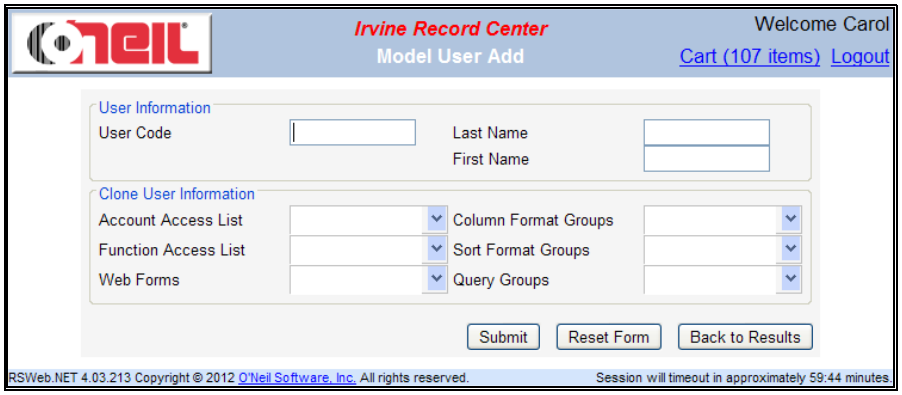
The Model User feature was designed to allow you to create a model user that other users can then reference for the following attributes.

- account access
- function access
- forms
- column format groups
- sort format groups
- query groups

This works similar to cloning; however, when changes are made to the model user, they are automatically made to all users that reference the model user.

NOTE: When a user references a model user, the attributes inherited from the model user cannot be modified for the user. Changes can only be made to the model user.

To create a model user, from the **User Admin** grid, **Options** menu, select **Add Model User**.



Enter a User Code, First Name, and Last Name that will help you easily identify this as a model user.

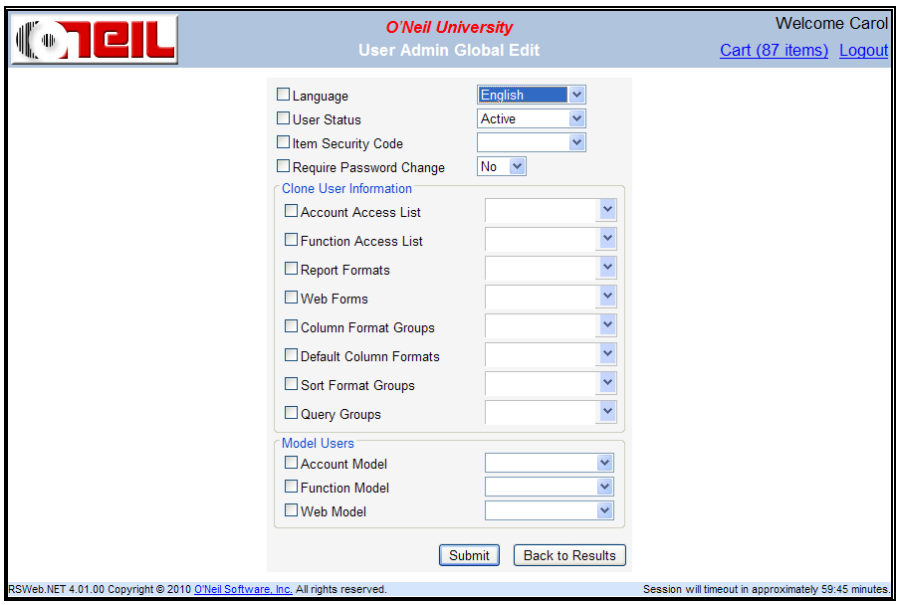
In the Clone User Information section, use the drop down list to select which user you want to clone from for each of the attributes. When you have finished, click **Submit**.

NOTE: Model users cannot log in to RSWeb.

Global Edit Model Users

When global editing model users, only the following fields will be updated. All other fields are ignored.

Account Access List
Function Access List
Web Forms
Column Fort Groups
Sort Format Groups
Query Groups



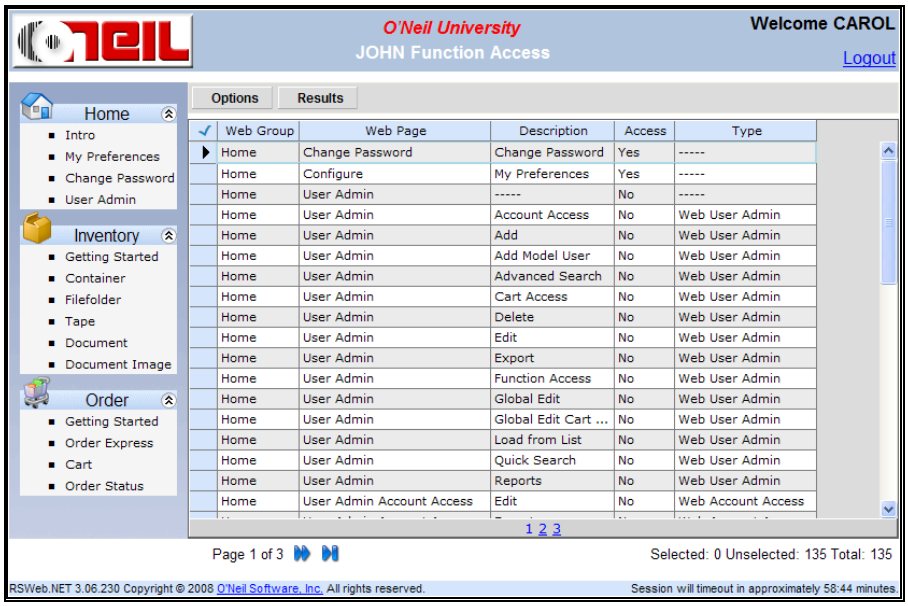
Function Access

This menu option is used by the Administrator to edit function access for users. This determines which features the user will have access to. The only function access records that appear are the ones that the Administrator has access to.

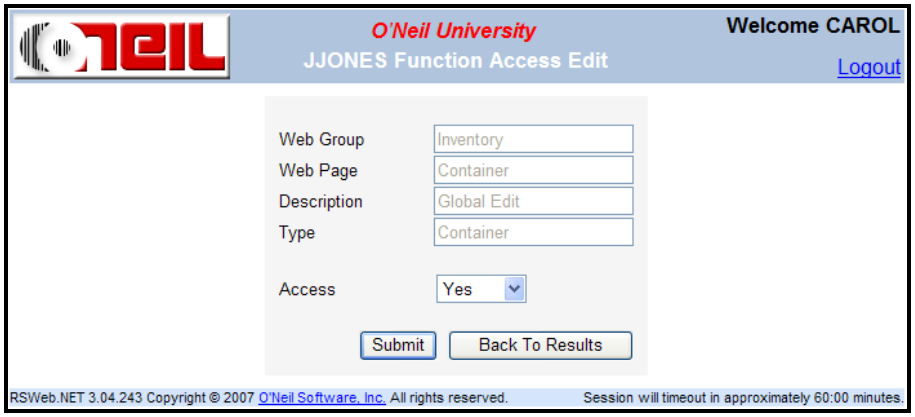
NOTE: The Administrator can view his own function access but cannot change it.

Edit

To edit function access for a user, load the user onto the grid and from the **Options** menu, select **Function Access.**



All available functions appear. Select the function access you want to change, and from the **Options** menu, select **Edit**.



Use the drop down arrow to change the Access field and click **Submit**. Access for the selected function is changed.

NOTE: If a user references a model user, you cannot edit function access for that user. You can, however, edit function access for the model user and all changes will be applied to users referencing the model user.

Global Edit

To edit more than one function access at a time, select the functions you want to edit. From the **Options** menu, select **Global Edit**.

Use the drop down arrow to change the Access field and click **Submit**. Access for all selected functions is changed.

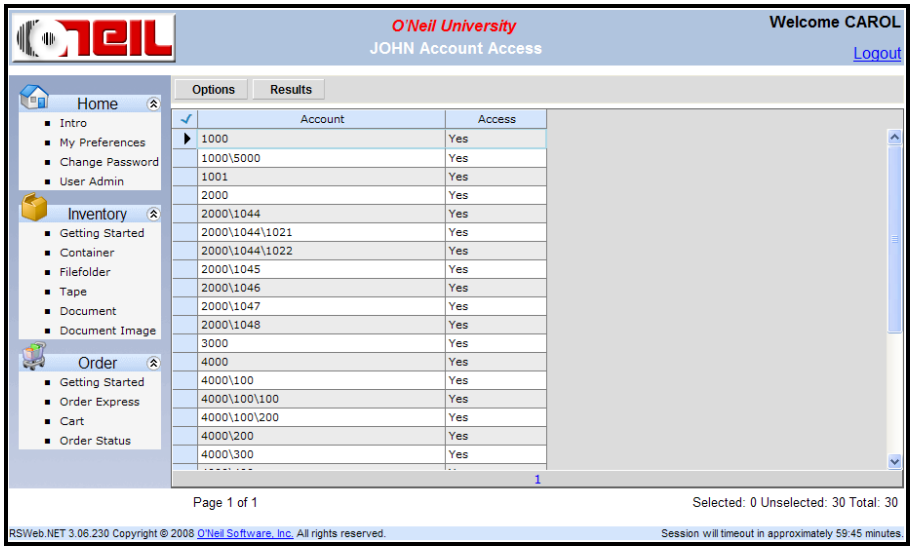
Account Access

The Administrator can use this menu option to edit account access for users. The only accounts that appear are the ones that the Administrator has access to.

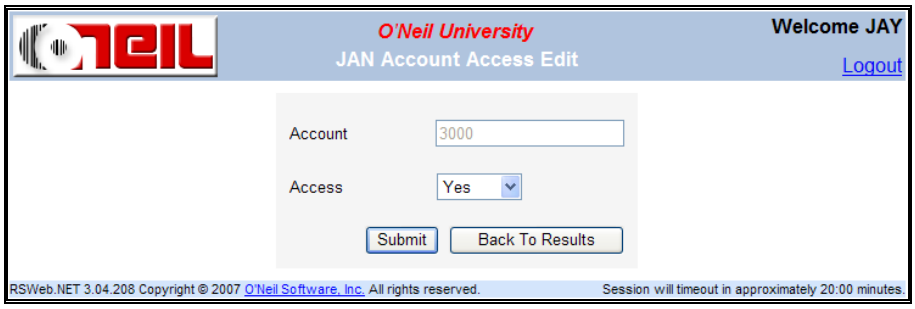
NOTE: The Administrator can view his own account access but cannot change it.

Edit

To edit account access for a user, load the user onto the grid and from the **Options** menu, select **Account Access.**



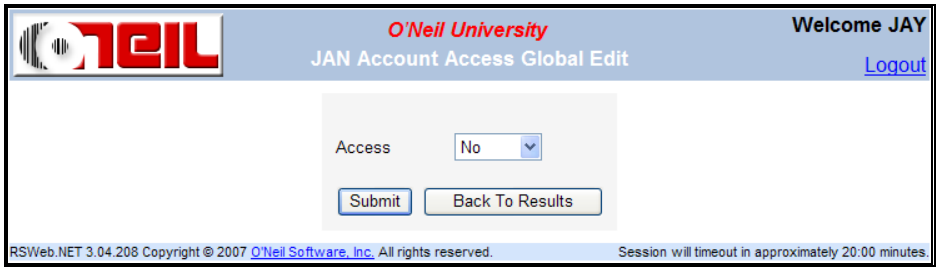
Select the account access you want to edit, and from the **Options** menu, select **Edit**.



Use the drop down arrow to change the Access field and click **Submit**. The selected account access is changed.

Global Edit

To edit more than one account access at a time, select the accounts you want to edit. From the **Options** menu, select **Global Edit**.



Use the drop down arrow to change the Access field and click **Submit**. Access for all selected accounts is changed.

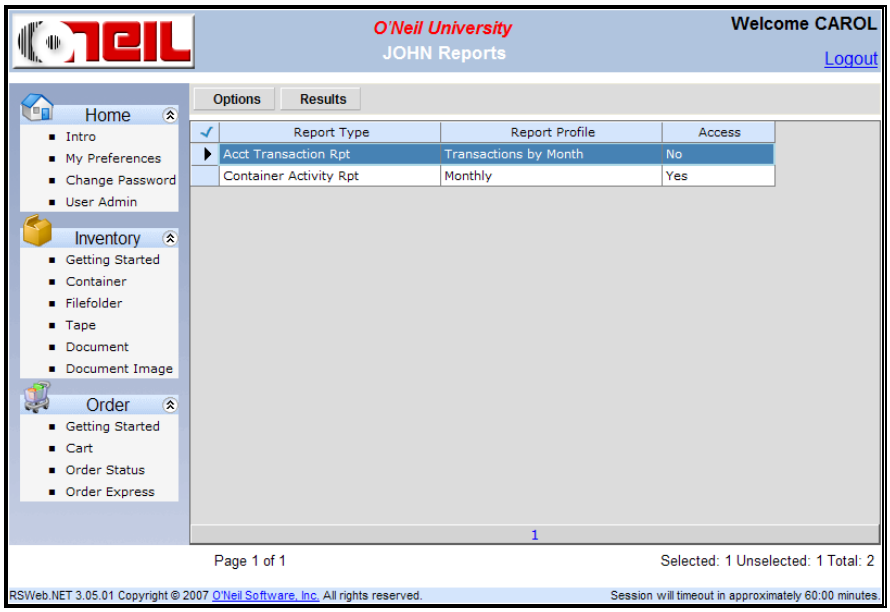
Reports

The Administrator can use this menu option to edit report access for users. The only reports that appear are the ones that the Administrator has access to.

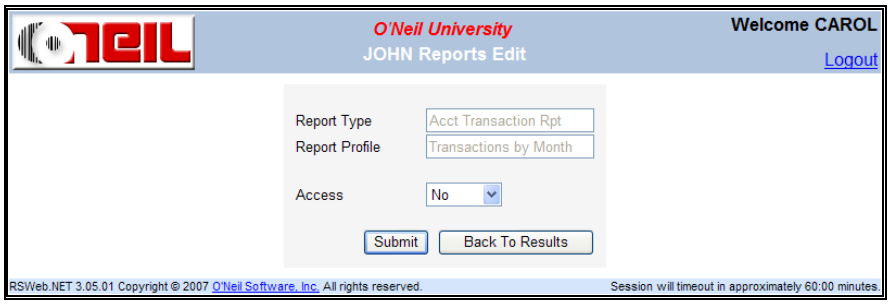
NOTE: The Administrator can view his own report access but cannot change it.

Edit

To edit report access for a user, load the user onto the grid and from the **Options** menu, select **Reports.**



Select the report access you want to edit, and from the **Options** menu, select **Edit**.



Use the drop down arrow to change the Access field and click **Submit**. The selected report access is changed.

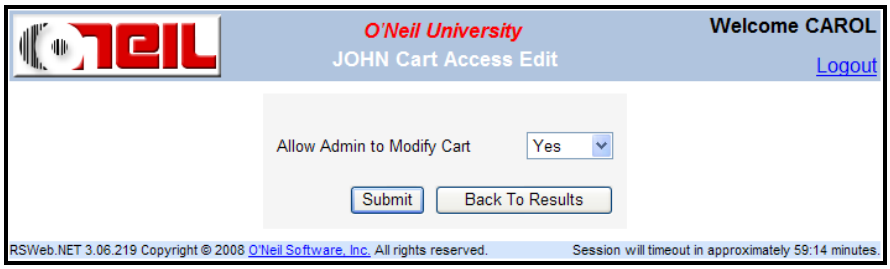
Global Edit

To edit more than one report access at a time, select the reports you want to edit. From the **Options** menu, select **Global Edit**.

Use the drop down arrow to change the Access field and click **Submit**. Access for all selected reports is changed.

Cart Access/Global Edit Cart Access

These options allow the administrator to edit or global edit the *Allow Admin to Modify Cart* check box for users. When set to Yes, the administrator can delete or check out items from the user's cart. The administrator can also view orders submitted by this user.



The user logged in cannot edit their own cart access, or include themselves in a global edit. If the administrator is selected in the **User Admin** grid, when **Global Edit Cart Access** is selected, the following message appears.

Print / Export

You can print or export from the **User Admin** grid, the same as all other grids in RSWeb.

Inventory

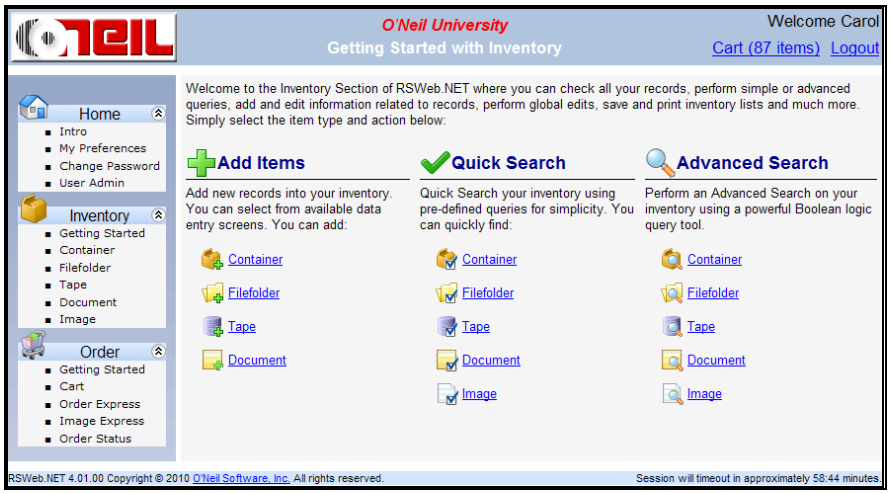
Introduction

The beauty of RSWeb and its connection with your record center's RS-SQL program is that you can access your stored items and actually update the information associated with them. You can also add new items. This makes data entry easier, eliminates duplicating labor, and ensures accuracy.

Containers, Filefolders, Tapes, and Documents each have their own menu options and grid for entering information. You can add new items at the click of a button, or conduct a query to find all the existing items for which you want to edit data. The database at the record center will be searched, and the items that meet our criteria will be loaded onto your screen. Once the items are loaded, you can click each one and edit any of the fields for each item. You can also globally edit several items at once.

Menu Options

The **Getting Started** menu option provides an overview of the Inventory options as well as links to some of the most commonly used features.



The **Container**, **Filefolder**, **Tape**, **Document,** and **Image** menu options each bring up a grid. Each of these grids has several menu options available along the top

of the grid. Many of the menu options are the same throughout the grids. However, there are a few that are specific to certain grids.

Options

Add (Container, Filefolder, Tape, Document only)

This option is used to add new items. It is described in detail later in this chapter.

Edit (All)

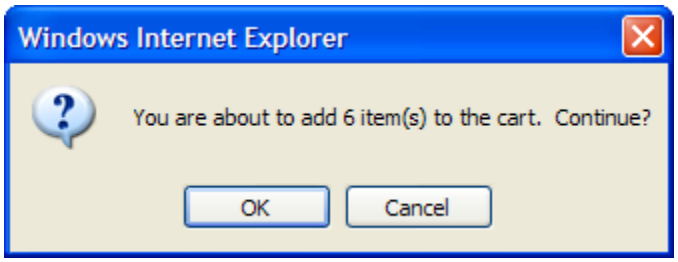
This option is used to edit existing items that have been loaded on the grid and selected for editing. It is described in detail later in this chapter.

Global Edit (All)

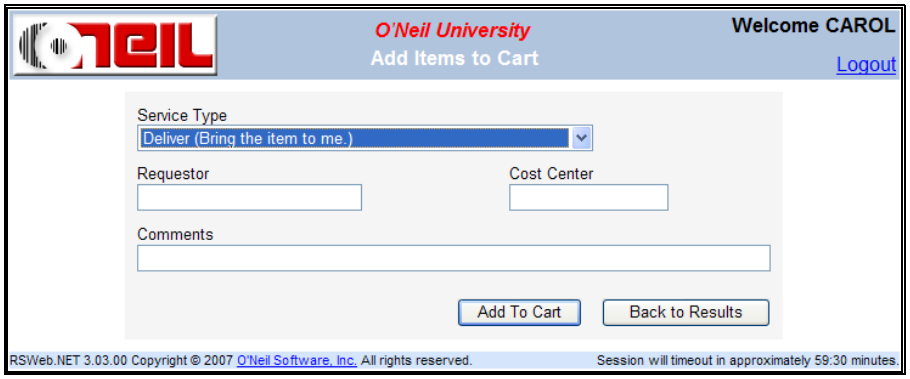
This option is used to edit multiple items at the same time. It is described in detail later in this chapter.

Add to Cart (Container, Filefolder, Tape only)

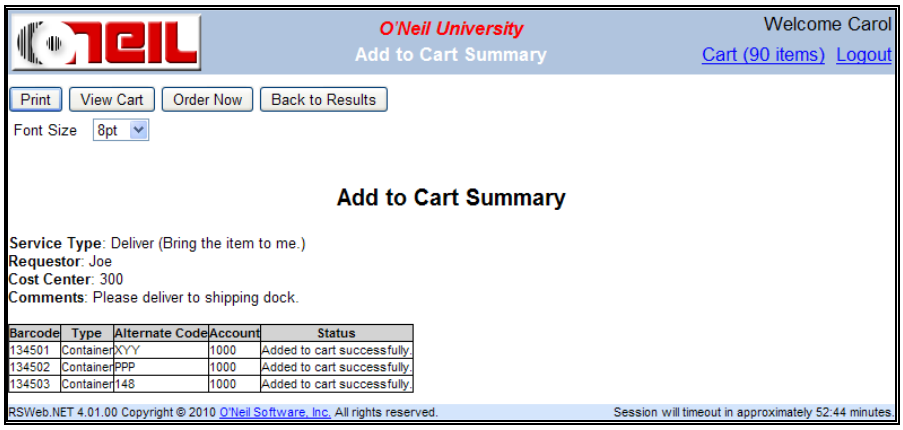
Once items have been loaded on the grid, you can send them directly to the cart. Select **Add to Cart** and the following screen appears.



Click **OK** to continue. The following screen appears.



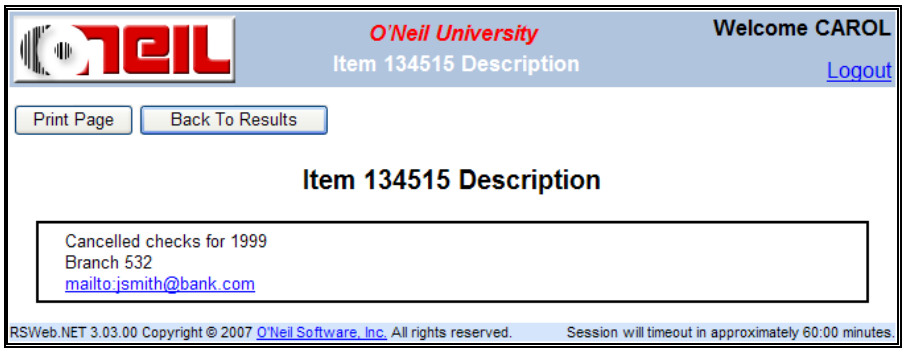
Use the drop down arrow to select the type of service you want for these items. Enter a Requestor name and Cost Center if desired. You can also include a comment for the record center. When you are finished, click **Add to Cart**. The following summary appears confirming the items have been added to the cart.



Click the **View Cart** button to view the items in the cart.

View Description (Container, Filefolder, Tape only)

This option is used to view the Description, if one exists, for an item.



The description view supports the following and converts them into links:

- http
- www
- mailto

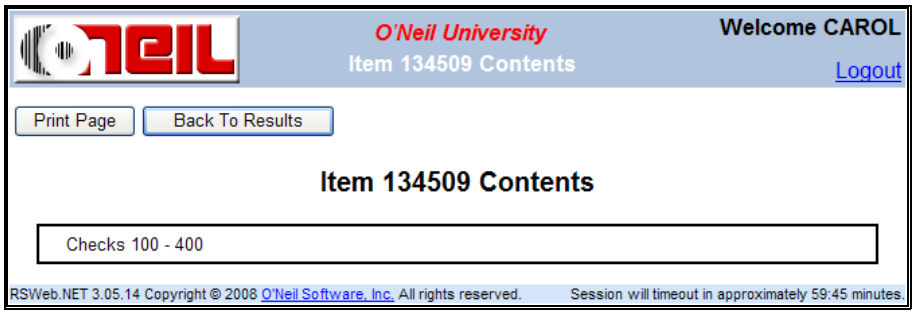
For example, if www.oneilsoft.com is included in the description, clicking on the reference will take you to that website. The same is true of email references, so clicking on mailto:jsmith@bank.com will attempt to invoke an email program with the To: field completed automatically.

NOTE: The links bring up the URL in a separate browser window. When you close the browser or email program, you are returned to the Description screen.

Click the **Back to Results** button to return to the Inventory grid.

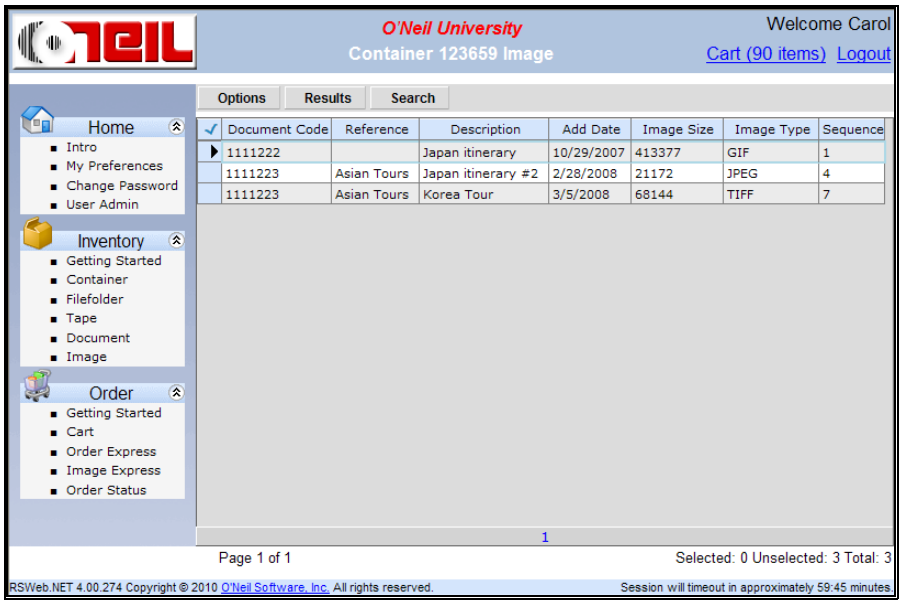
View Contents (Container, Filefolder, Tape only)

This option works the same as the View Description option, but displays Contents for an item rather than the Description.



List Images (Container, Filefolder, Document only)

This option lists all images contained in the selected item. Select a container (or filefolder or document) in the grid and under the **Options** menu, select **List Images**. The **Container *xyz* Image** screen appears.



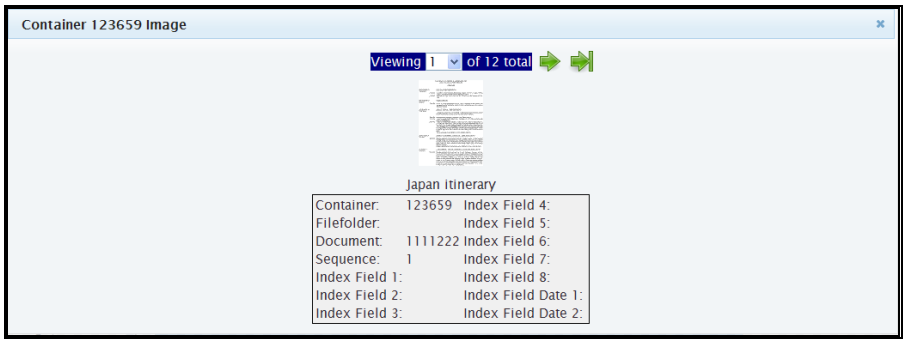
All images contained in the current item are displayed.

- For containers - images in the container, images in the filefolders (and images in the documents in those filefolders) in the container, and images in the documents in the container.
- For filefolders - images in the filefolder and images in the documents in those filefolders.

Items will be sorted by Container Code + Filefolder Code + Document Code + Sequence.

View Images (Container, Filefolder, Document only)

This option allows you to view all images contained in the selected item. Select a container (or filefolder or document) in the grid and under the **Options** menu, select **View Images**. The images for the current item appear along with the image information.



Click the arrows to navigate between multiple images. Click the thumbnail to view the full image.

View Image (Image only)

This option allows you to view images from the Image grid. You can select and view multiple images at the same time.

Delete (Document, Image only)

This option is used to delete a document or image from the database.

Add Document Imaging Requests to Cart (Document only)

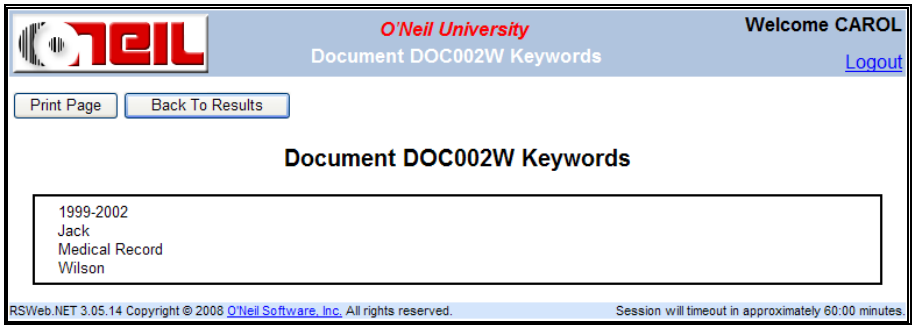
This option is used to add an imaging request to the cart. See the *Document* section for more information.

Add FF/Container to Cart (Document only)

This option is used to add the filefolder or container that a document is contained in to the cart. See the *Container* or *Filefolder* section for more information.

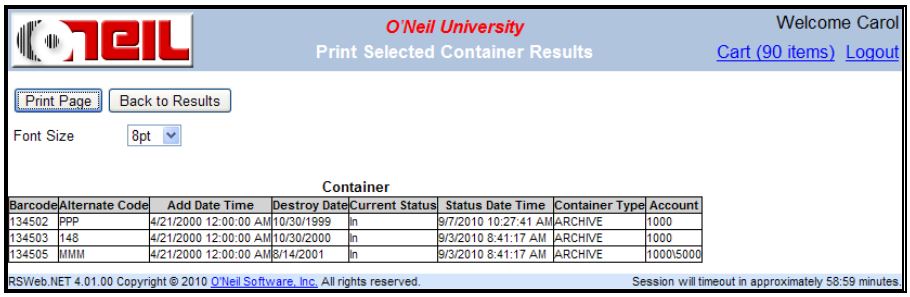
View Keywords (Document only)

This option works the same as the View Description option, but displays Keywords for a document.



Print (All)

This option is used to print the data displayed on a grid. When this menu option is selected from within any grid, the data in the grid is formatted into a printable black and white table.

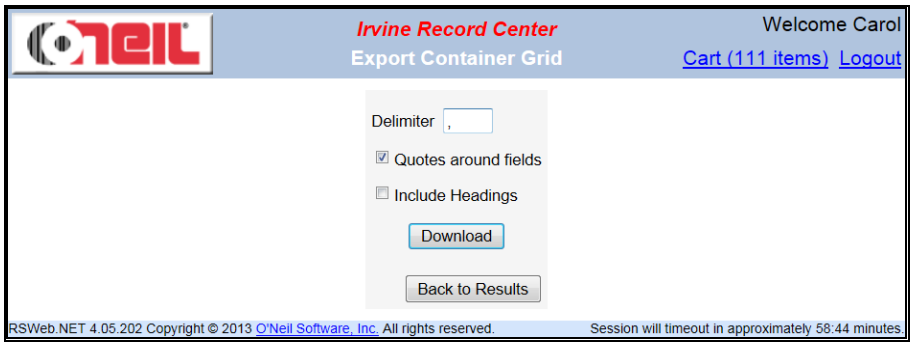


The default font size is 8 pt. Click the drop down arrow to change the point size. You can use your browser's Print Preview feature to see how the page will look when printed. Click the **Print Page** button to print the table.

Export (All)

All grids in RSWeb have an Export feature. This allows you to export data to a .txt file that can be viewed in Microsoft Excel.

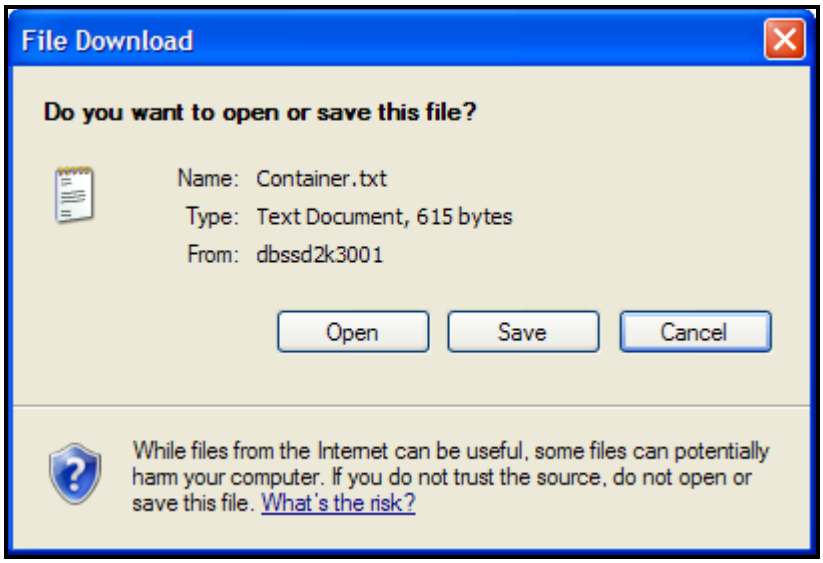
Load the data you want to export onto the grid. From the **Options** menu in any grid, select **Export**. The **Export Grid** dialog appears.



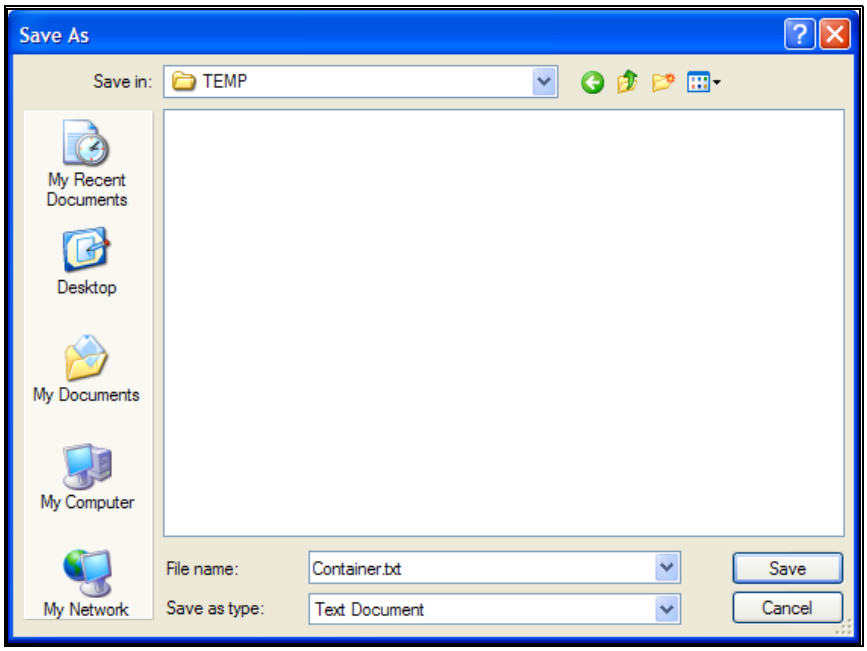
By default, the Delimiter is a comma (,) and the Quotes around fields check box is selected. Both settings can be changed.

Select the Include Headings check box to include column headings in your export. The exported headings will match the headings displayed in the grid. By default, the check box is not selected. This setting is not saved, so each time you enter the **Export** dialog, the check box will be cleared.

Click the **Download** button to begin the export. The **File Download** dialog gives you the option to **Open** or **Save** the file.



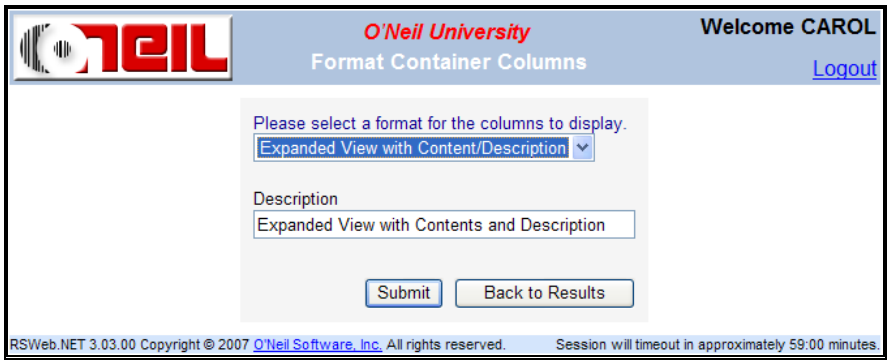
Click **Save**, and the **Save As** dialog appears.



Enter the path where you want the file saved. You can also rename the file. Click **Save** when you have finished.

Choose Column Format (All)

This option is used to determine which columns appear on the grid. Custom formats may have been created for you by the record center.



To change to a different format, click the drop down arrow and make your selection. A description of the format displays in the Description field. When you have made your selection, click **Submit**. Click **Back to Results** to return to the grid.

Results

Select All

This option is used to select all items on a grid. When an item is selected, its row appears with a dark blue background.

Unselect All

This option is used to unselect all items on a grid.

Invert Selection

After selecting several items in a grid, you may decide to make a change to all the other unselected items. In this case you can invert the selected items. This causes all selected items to become unselected, and all unselected items to become selected.

Clear All

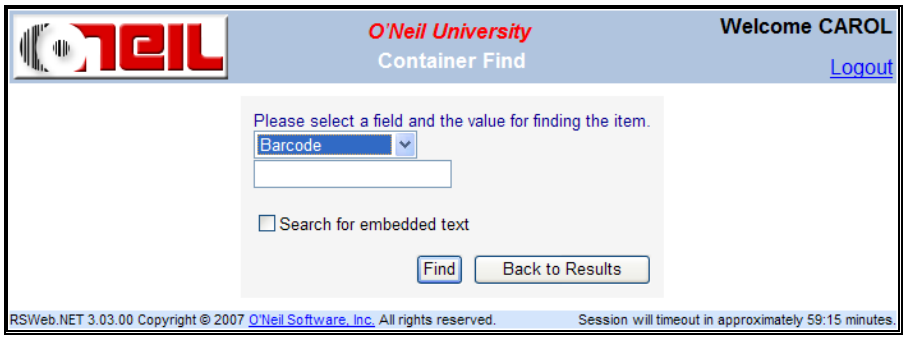
This option clears all items from the grid.

Clear Selected

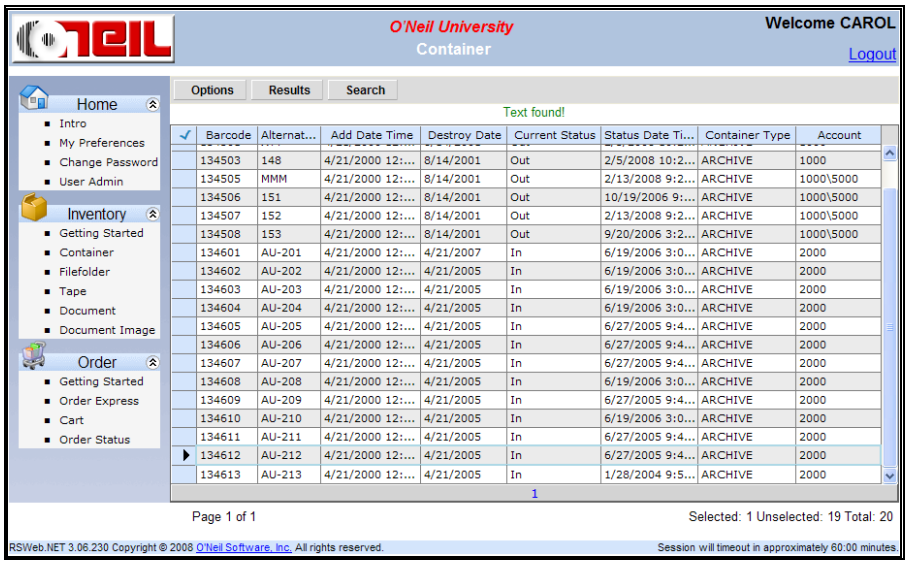
This option clears only selected items from the grid.

Find / Find Next

The **Find** menu option is used to locate a particular item that is listed in a grid. If your grid spans several pages you can use the **Find** menu option to locate an item quickly, rather than scrolling through each page.



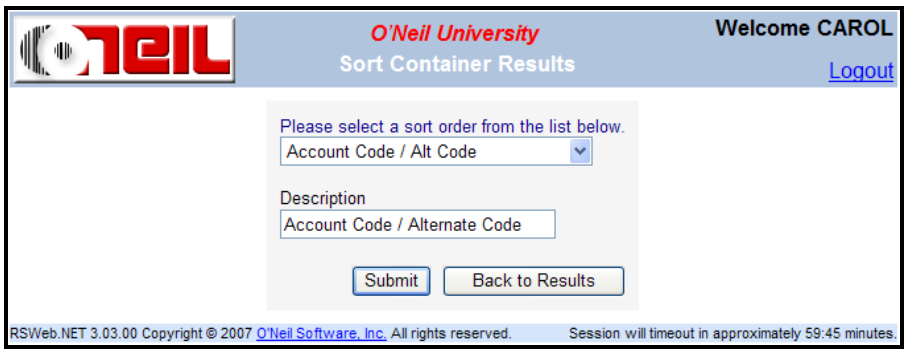
Click the drop down arrow to select the field you want to use, and then enter the value. For example, you may want to find items in your grid that are of a certain container type. Select Container Type and then enter the type of container in the value field. To include embedded text in your search, select the Search for embedded text check box. Click **Find** to locate the item in the grid.



The first item matching the value entered is highlighted in the grid. To continue searching for the next item that matches the value entered, use the **Find Next** menu option.

Sort

This option is used to determine which columns you want your grid sorted by. Custom sort options may have been created for you by the record center.



To change to a different sort order, click the drop down arrow and make your selection. A description of the sort order displays in the Description field. When you have made your selection, click **Submit**. Click **Back to Results** to return to the grid.

Save to List

This option is used to save a list of items that have been loaded onto a grid. You can then use the **Load from List** menu option (see below) to quickly load that same list of items any time you need it.

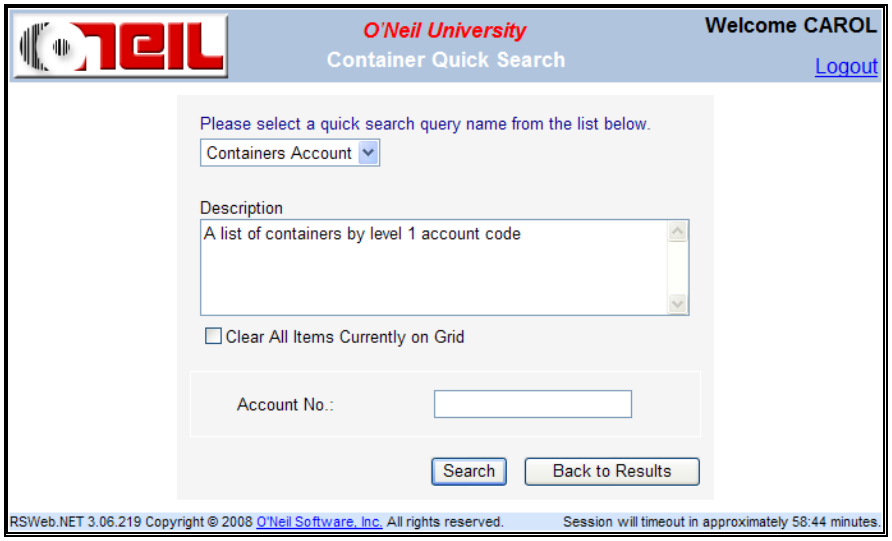
Load all the items you want to appear in your list. Make sure they are selected. Then from the **Results** menu, select **Save to List**.

Enter a name for the list and click **Save**. The list is saved and can now be used again. Click **Back to Results** to return to the grid.

Search

Quick Search

This option provides quick queries that have been created by the record center.

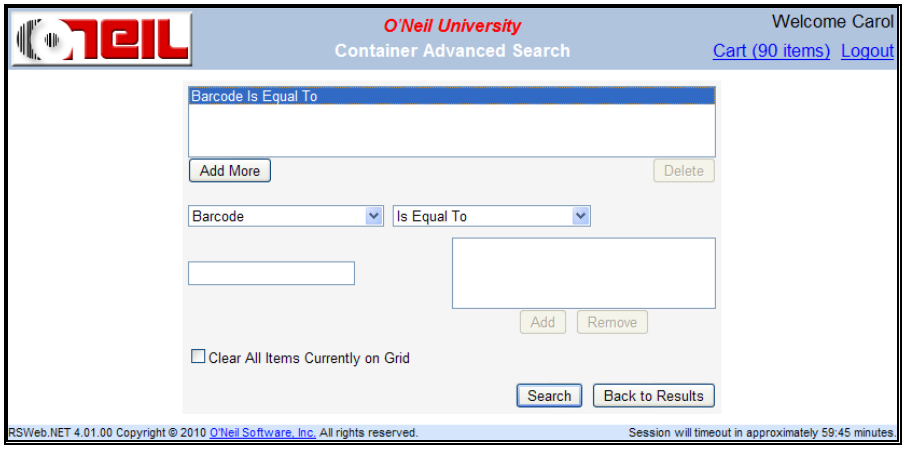


Click the drop down arrow next to the list of quick queries to make your selection. A description of the quick query displays in the Description field. Depending on the quick query selected, additional fields may display for you to enter data. When you have made your selection and entered any required data, click **Query**. The query runs and all data matching the criteria is loaded onto the grid.

NOTE: The query name field displays the last query selected. The last data that was entered also displays.

Advanced Search

Using **Advanced Search** you can specify your criteria, view the results of your search, and determine which items to add to the cart. To conduct a search, from the **Search** menu, select **Advanced Search**. The following screen appears.



The top box displays all criteria for the search as it is defined. To add additional criteria, click **Add More**. To remove criteria, click **Delete**.

In the lower section, you can define the criteria for your search. Click the drop down arrow to select a field and then select an operator. Additional input fields become available depending on the field and operator selected.

Operator options include the following (depending on the field selected).

Is Equal To	Returns only items that match the entered text exactly.
Is Not Equal To	Returns all items that do not match the entered text.
Is Less Than	Returns all items that are less than the entered text.
Is Less Than or Equal To	Returns all items that are less than or equal to the entered text.
Is Greater Than	Returns all items that are greater than the entered text.
Is Greater Than or Equal To	Returns all items that are greater or equal to the entered text.
Contains	Returns all items that contain the entered text anywhere within it.
Begins With	Returns all items that begin with the entered text.

Type the constant in the input field, and then click **Add**. For some fields you can enter multiple constants.

NOTE: If you select a field that is required, and use the Is Equal To operator, you cannot leave the input field blank. If you do, an error message is generated.

Select the Clear All Items Currently on Grid check box if you want to clear all existing items from the grid before your results are returned. Otherwise, the new results will be added to the existing items already on the grid.

After you have entered all the criteria for your search, click **Submit**. RSWeb accesses the RS-SQL database at the record center and conducts your search. All items matching your criteria are loaded onto the Inventory grid.

If you find that you did not get all the search results you were looking for, you can return to the Search screen and query again.

Load from List

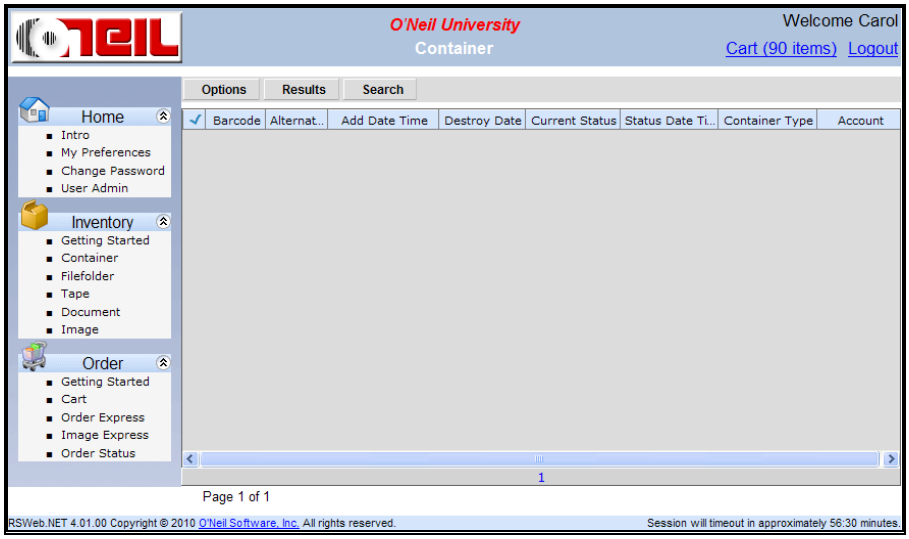
Once a list of items has been saved, it can be loaded again.

Click the drop down arrow to select the list you want to load. Click **Load** to load the list. The list of items is loaded onto the grid.

You can also delete lists from this dialog by selecting the list and clicking **Delete**.

Containers

The Container grid is used to load containers for which you want to enter information. To access the Container grid, from the **Inventory** menu, select **Container**.

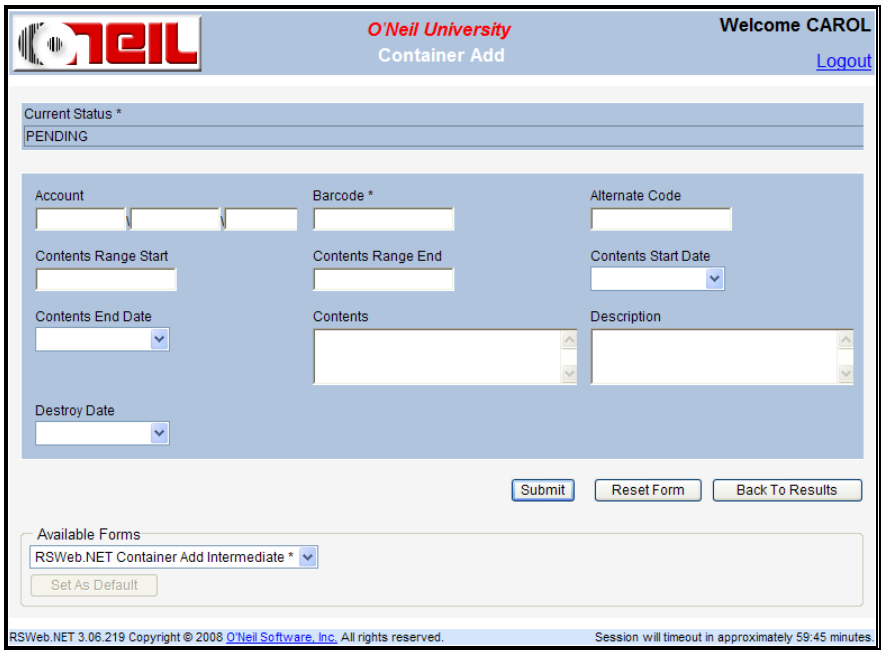


NOTE: The Container grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

Add New Containers

New containers can be added to your account using RSWeb. Once the information is entered and submitted, it is added to the database at the record center.

To add a new container, from the **Options** menu, select **Add**. The default Container Add form appears.



If you want to use a different form, click the down arrow next to the Available Forms field and make your selection.

Enter your data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Date fields bring up a calendar. Some fields may contain a drop down list for you to select from. The following keystrokes can be used for easy navigation within a drop down selection list. In addition, the drop down list can be closed by double clicking anywhere in the form.

Keystroke	**Action**
Up/Down arrow	Moves the cursor up/down to select a row in current page
Home	Moves the cursor to the first row in the current page
End	Move the cursor to the last row in the current page
Ctrl + Page Down	Displays the next page
Ctrl + Page Up	Displays the previous page
Ctrl + Home	Displays the first page
Ctrl + End	Displays the last page
Left arrow	Moves the scroll bar left (if it is shown)
Right arrow	Moves the scroll bar right (if it is shown)
Page Down	Moves the scroll bar down (if it is shown)
Page Up	Move the scroll bar up (if it is shown)

Enter	Selects a value, closes the drop down and puts focus on the display
Esc	Closes the dropdown and puts focus on the display

Once you have completed the fields, click **Submit**.

Continue entering as many containers as necessary. When you have finished entering data, click **Back to Results** to return to the Container grid. The containers you have entered appear in the grid.

Search for Existing Containers

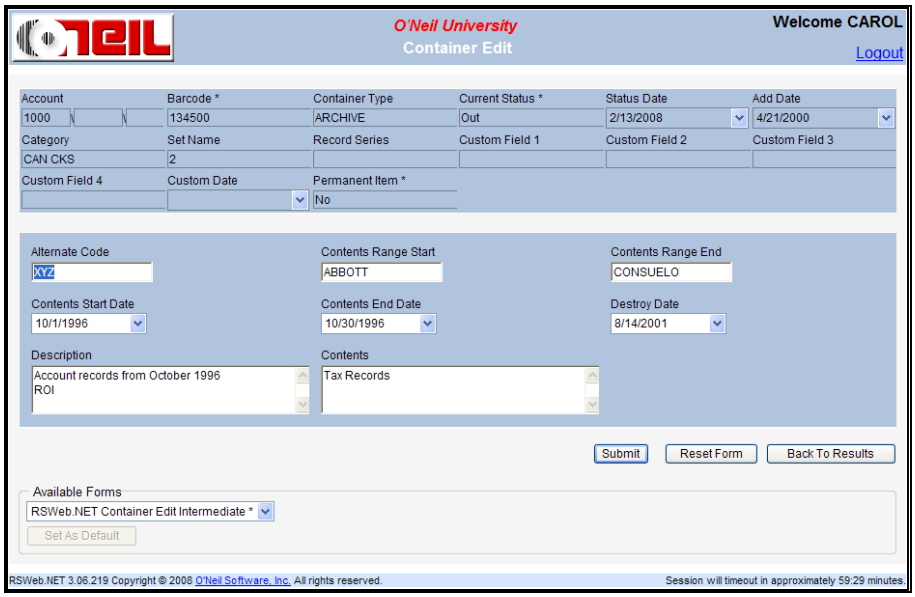
To search for existing containers, from the **Search** menu, select either **Quick Search** or **Advanced Search**. Both of these menu options are described in the *Menu Options* section earlier in this chapter.

Edit Existing Containers

Data for existing containers can be edited using RSWeb. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a container, you must first load the container onto the grid. When the container is loaded and has been selected, from the **Options** menu, select **Edit**. The default Container Edit form appears.

NOTE: You can also bring up the default Edit form by double clicking on an item in the grid.



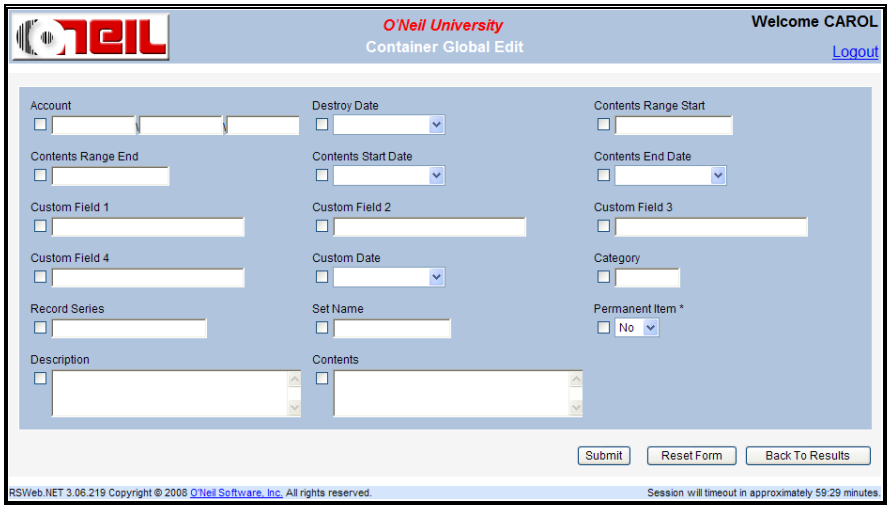
If you want to use a different form, click the down arrow next to the Available Forms field and make your selection.

Make your changes or enter new data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue making necessary changes to any other containers. The changes you have entered are sent to the database at the record center.

Global Edit Containers

Global edit is used when you want to edit several items at once. Make sure all containers you want to edit are selected on the grid, and from the **Options** menu, select **Global Edit**. The default Container Global Edit form appears.



Because any information you enter in this dialog will affect more than one item, no container information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for a container.

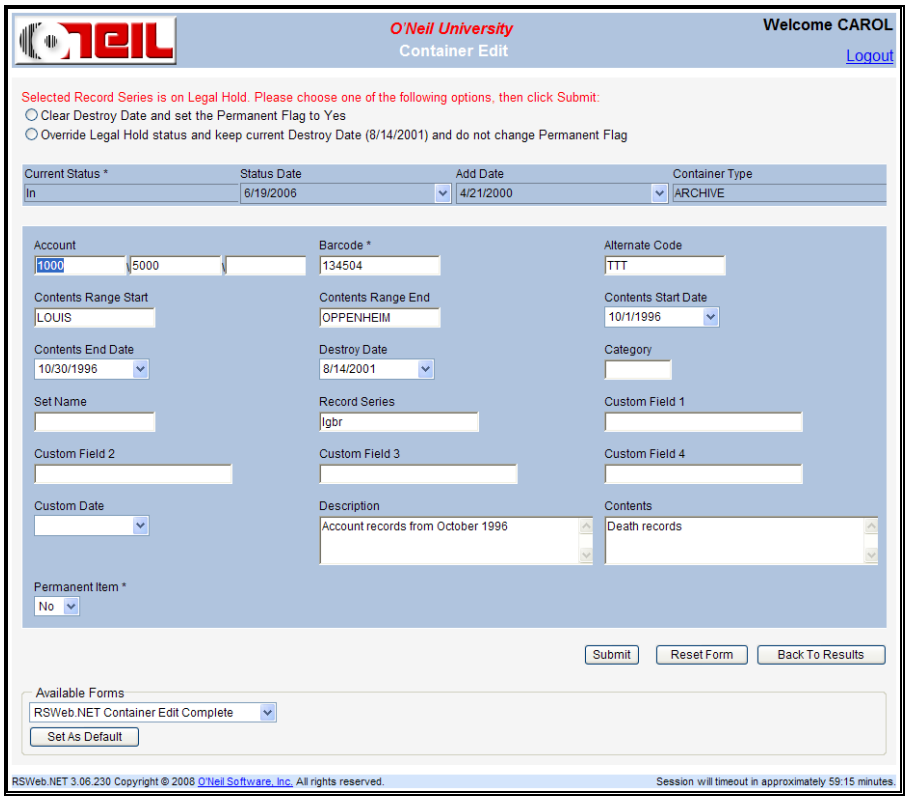
To global edit a field, first select the check box next to the field name. Next, enter the information you want to appear in that field for all the containers. Be aware that if a check box is selected but the field is left blank, the field will be edited to blank for all the containers. Only select the check boxes for the fields you want to edit.

When you have finished making changes, click **Submit**. The changes are made and you are returned to the **Container** grid.

Retention Information

When adding/editing an item, after the **Submit** button has been clicked, the retention information related fields are checked to see if the calculated destroy date has changed and whether the record series is on Legal Hold.

If the record series is on Legal Hold and the current Destroy Date is blank and the Permanent Flag is set to Yes, the item is saved without prompting you because nothing changed. If the Destroy Date is not blank or the Permanent Flag is set to No, you receive the following prompt.

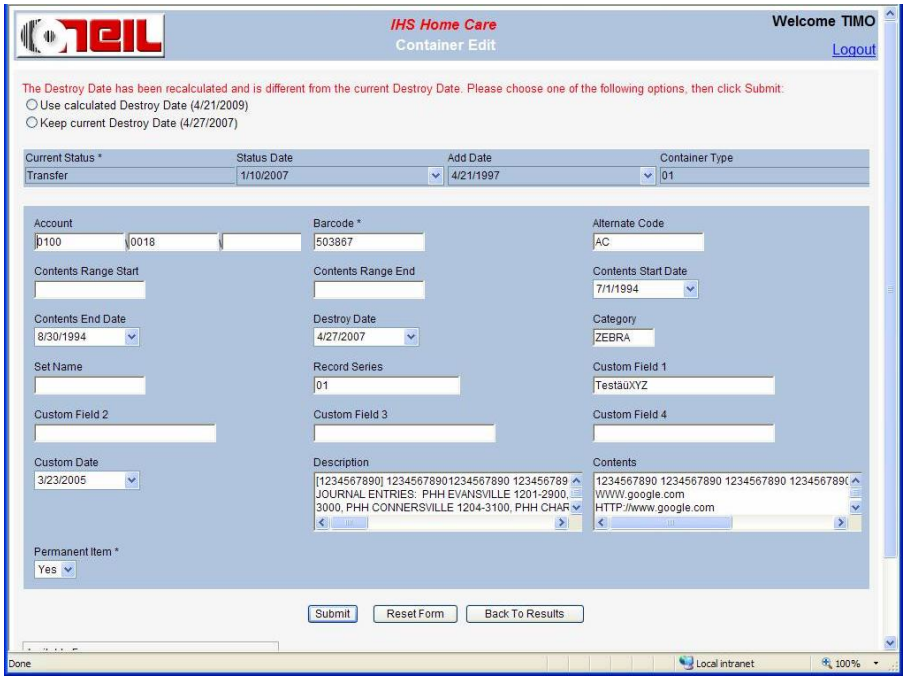


If you select "Clear Destroy Date and set the Permanent Flag to Yes" and click **Submit**, the Destroy Date will be cleared, the Permanent Flag will be set to Yes, and the record will be saved.

If you select "Override Legal Hold status and keep current Destroy Date" and click **Submit**, no changes are made and the record is saved.

If the current Destroy Date is blank and a new Destroy Date has been calculated, the Destroy Date will automatically be updated with the calculated Destroy Date and the record will be saved without prompting you.

If the current Destroy Date is not blank and the calculated Destroy Date is different from the current one, or if the current Permanent Flag is Yes, you receive the following prompt.

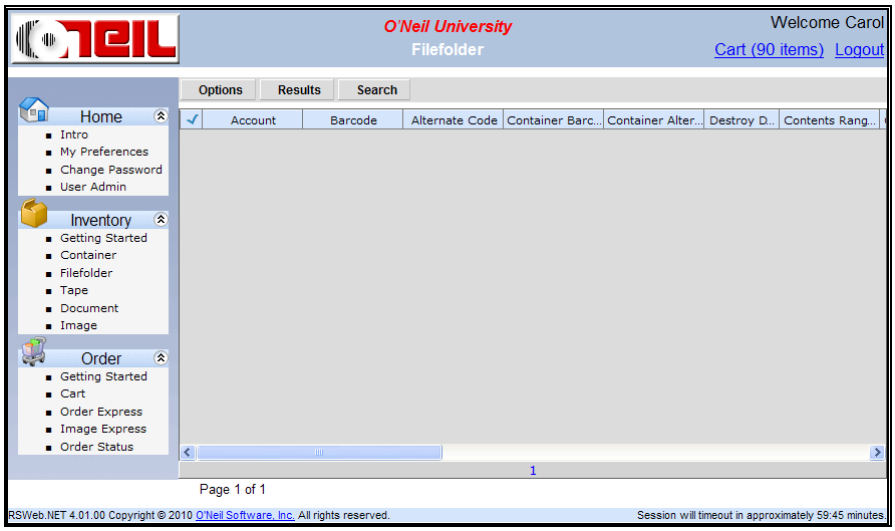


If you select “Use calculated Destroy Date” and click **Submit**, the Destroy Date will be set with the calculated date, the Permanent Flag will be set to No if necessary, and the record will be saved.

If you select “Keep current Destroy Date” and click **Submit**, the record will be saved with the current Destroy Date and Permanent Flag.

Filefolders

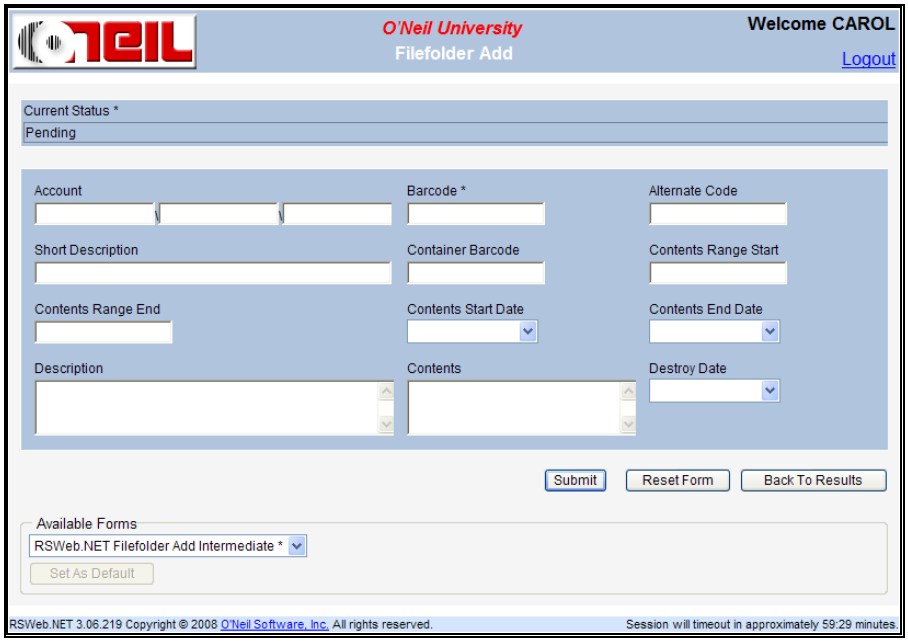
The Filefolder grid is used to load filefolders for which you want to enter information. To access the Filefolder grid, from the **Inventory** menu, select **Filefolder**.



NOTE: The Filefolder grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

Add New Filefolders

To add a new filefolder, from the **Options** menu, select **Add**. The default Filefolder Add form appears.



If you want to use a different form, click the down arrow next to the Available Forms field and make your selection.

Enter your data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue entering as many filefolders as necessary. When you have finished entering data, click **Back to Results** to return to the Inventory grid. The filefolders you have entered appear in the grid.

Search for Existing Filefolders

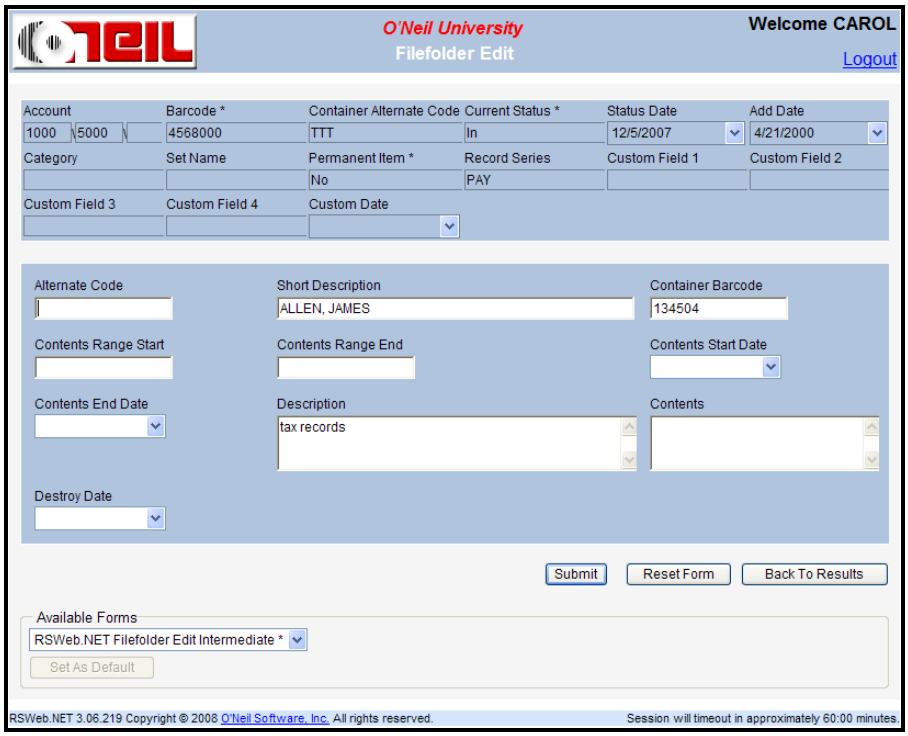
To search for existing filefolders, from the **Search** menu, select either **Quick Search** or **Advanced Search**. Both of these menu options are described in the *Menu Options* section earlier in this chapter.

Edit Existing Filefolders

Data for existing filefolders can be edited using RSWeb. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a filefolder, you must first load the filefolder onto the grid. When the filefolder is loaded and has been selected, from the **Options** menu, select **Edit**. The default Filefolder Edit form appears.

NOTE: You can also bring up the default Edit form by double clicking on an item in the grid.



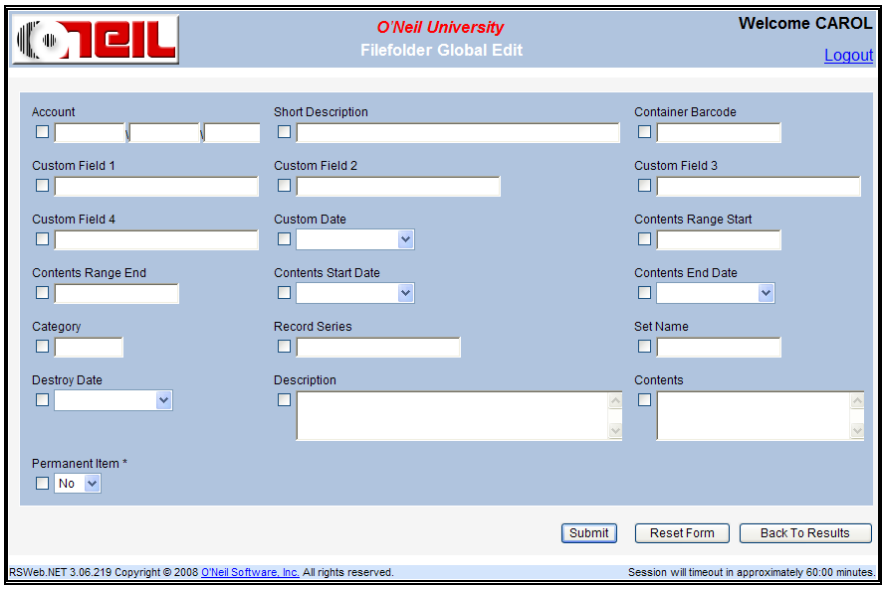
If you want to use a different form, click the down arrow next to the Available Forms field and make your selection.

Make your changes or enter new data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue making necessary changes to any other filefolders. The changes you have entered are sent to the database at the record center.

Global Edit Filefolders

Global edit is used when you want to edit several filefolders at once. Make sure all filefolders you want to edit are selected on the grid, and from the **Options** menu, select **Global Edit**. The default Filefolder Global Edit form appears.



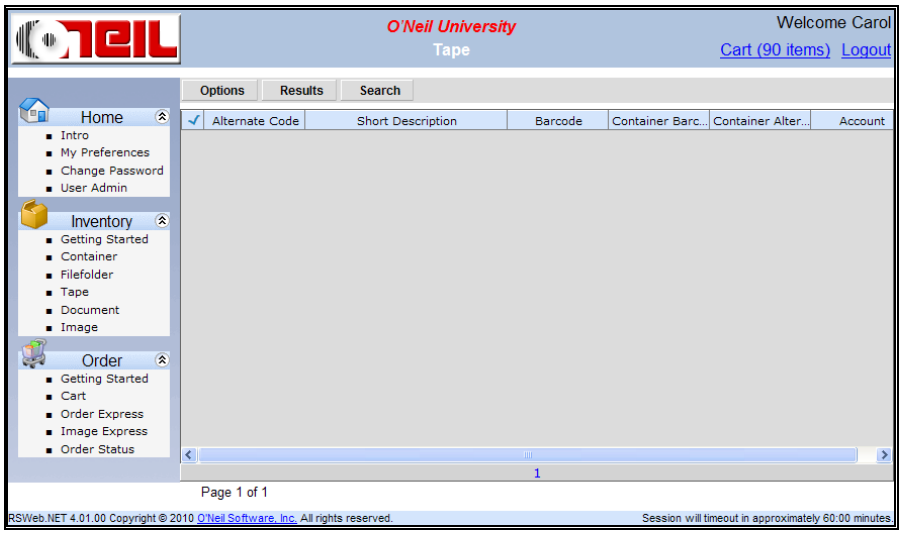
Because any information you enter in this dialog will affect more than one item, no filefolder information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for a filefolder.

To global edit a field, first select the check box next to the field name. Next, enter the information you want to appear in that field for all the filefolders. Be aware that if a check box is selected but the field is left blank, the field will be edited to blank for all the filefolders. Only select the check boxes for the fields you want to edit.

When you have finished making changes, click **Submit**. The changes are made and you are returned to the Filefolder grid.

Tapes

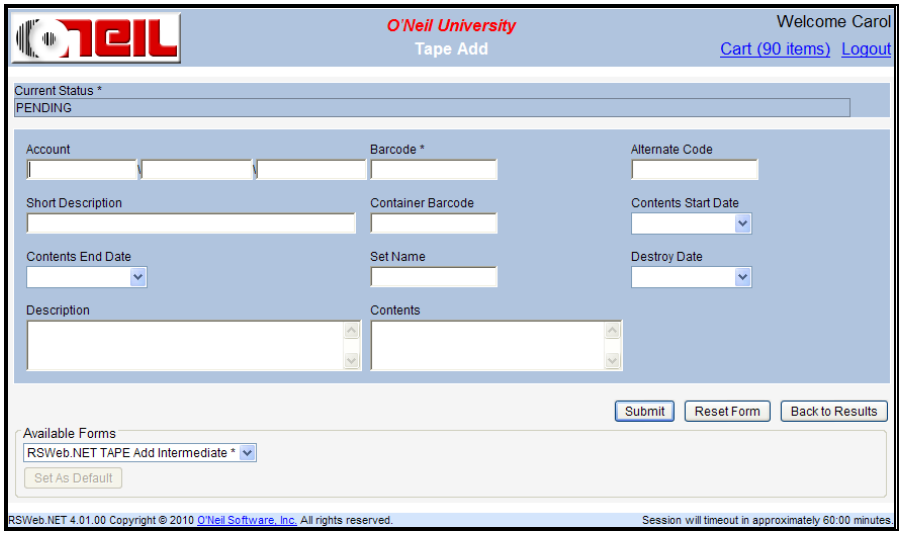
The Tape grid is used to load tapes for which you want to enter information. To access the Tape grid, from the **Inventory** menu, select **Tape**.



NOTE: The Tape grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

Add New Tapes

To add a new tape, from the **Options** menu, select **Add**. The default Tape Add form appears.



If you want to use a different form, click the down arrow next to the Available Forms field and make your selection.

Enter your data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue entering as many tapes as necessary. When you have finished entering data, click **Back to Results** to return to the Tape grid. The tapes you have entered appear in the grid.

Search for Existing Tapes

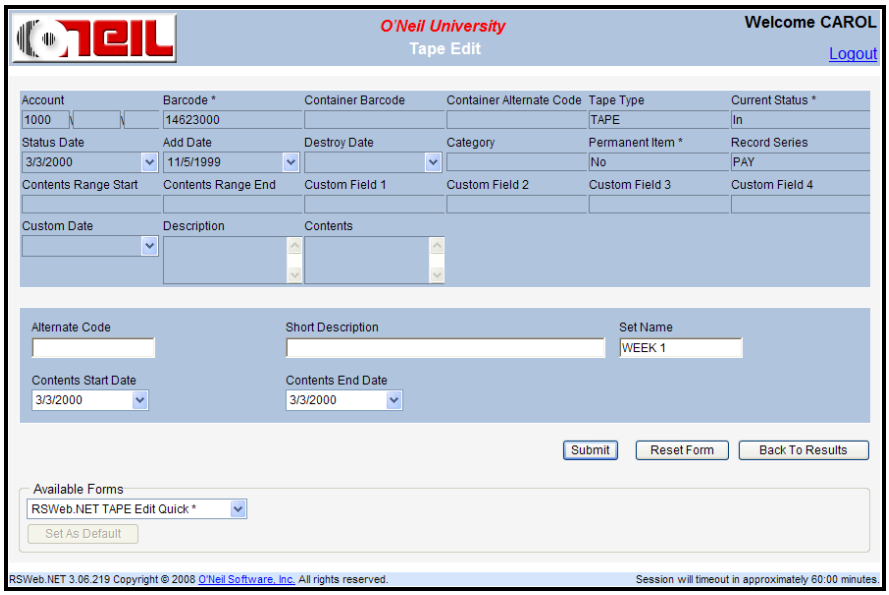
To search for existing tapes, from the **Search** menu, select either **Quick Search** or **Advanced Search**. Both of these menu options are described in the *Menu Options* section earlier in this chapter.

Edit Existing Tapes

Data for existing tapes can be edited using RSWeb. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a tape, you must first load the tape onto the grid. When the tape is loaded and has been selected, from the **Options** menu, select **Edit**. The default Tape Edit form appears.

NOTE: You can also bring up the default Edit form by double clicking on an item in the grid.



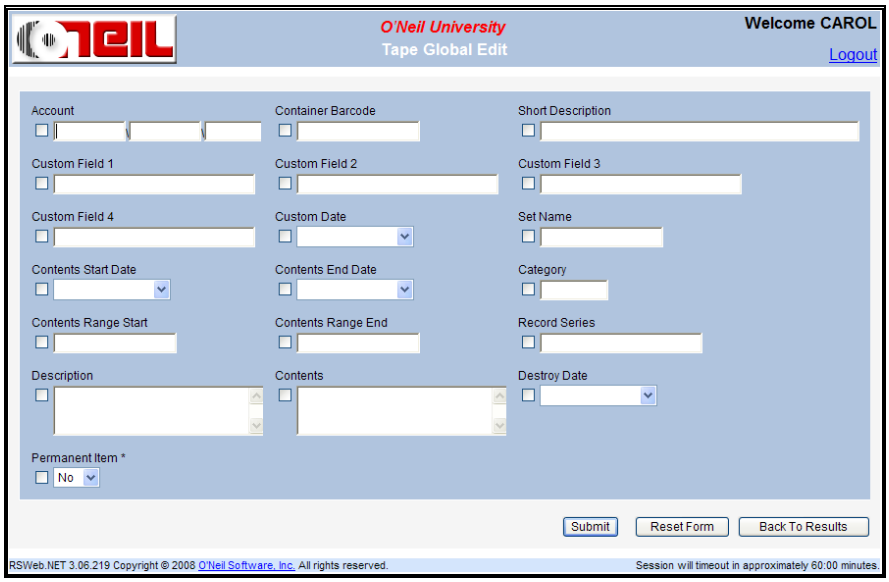
If you want to use a different form, click the down arrow next to the Available Forms field and make your selection.

Make your changes or enter new data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue making necessary changes to any other tapes. The changes you have entered are sent to the database at the record center.

Global Edit Tapes

Global edit is used when you want to edit several tapes at once. Make sure all tapes you want to edit are selected on the grid, and from the **Options** menu, select **Global Edit**. The default Tape Global Edit form appears.



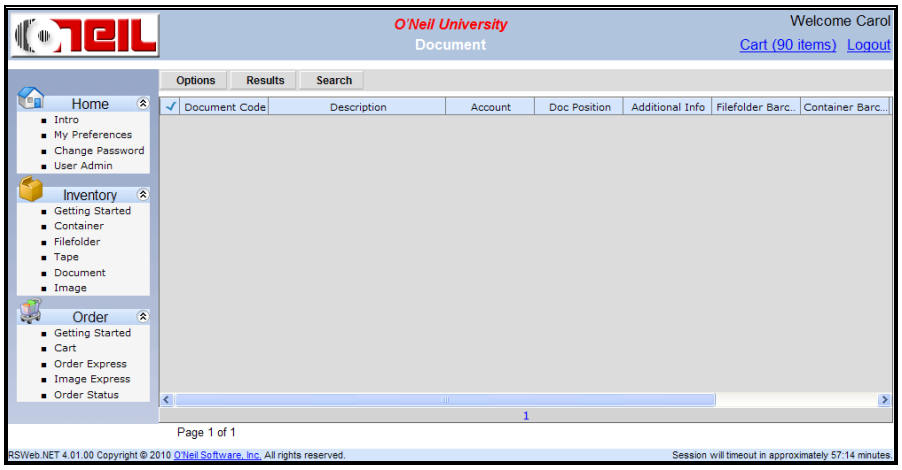
Because any information you enter in this dialog will affect more than one item, no tape information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for a tape.

To global edit a field, first select the check box next to the field name. Next, enter the information you want to appear in that field for all the tapes. Be aware that if a check box is selected but the field is left blank, the field will be edited to blank for all the tapes. Only select the check boxes for the fields you want to edit.

When you have finished making changes, click **Submit**. The changes are made and you are returned to the Tape grid.

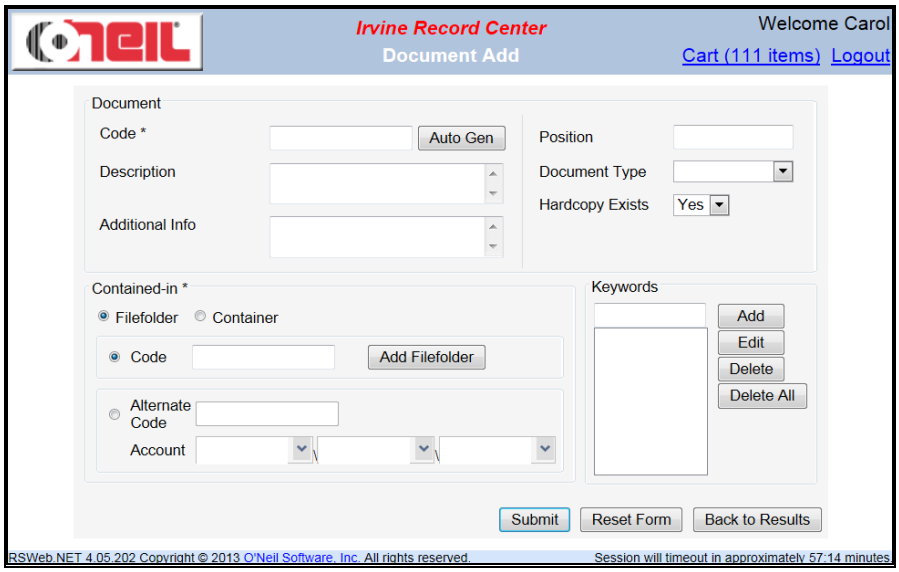
Documents

The Document grid is used to load documents for which you want to enter information. To access the Document grid, from the **Inventory** menu, select **Document**.



Add New Documents

New documents can be added to your account using RSWeb. Once the information is entered and submitted, it is added to the database at the record center. To add a new document, from the **Options** menu, select **Add**. The Document Add form appears.



Document Section

Code: Type the code in this field, or use the **Auto Gen** button to auto generate a code. The **Auto Gen** button is only available if it has been set up by your record center.

Description: Type a description for the document.

Additional Info: In this field you can type any additional information you want to include for the document.

Position: Use to describe the position of the document in the container/filefolder.

Document Type: Use the drop down arrow to select the type of document. Document types are set up by your record center.

Hardcopy Exists: Use the drop down arrow to indicate whether or not a hard copy of this document exists. The default setting is Yes.

Contained-In Section

In this section, indicate whether the document is to be contained in a filefolder or a container. Complete the fields based on the selection you make. You must enter either a Code or an Alternate Code and Account.

Code: Enter the code for the filefolder or container that contains the document. To add a new filefolder, click **Add Filefolder**.

Alternate Code/Account: If you do not know the code, you can enter the alternate code and account instead.

Keywords Section

Use this section to add keywords for the document. They can be used to search on later. You can add keywords, edit existing keywords, delete a keyword, or delete all keywords at once.

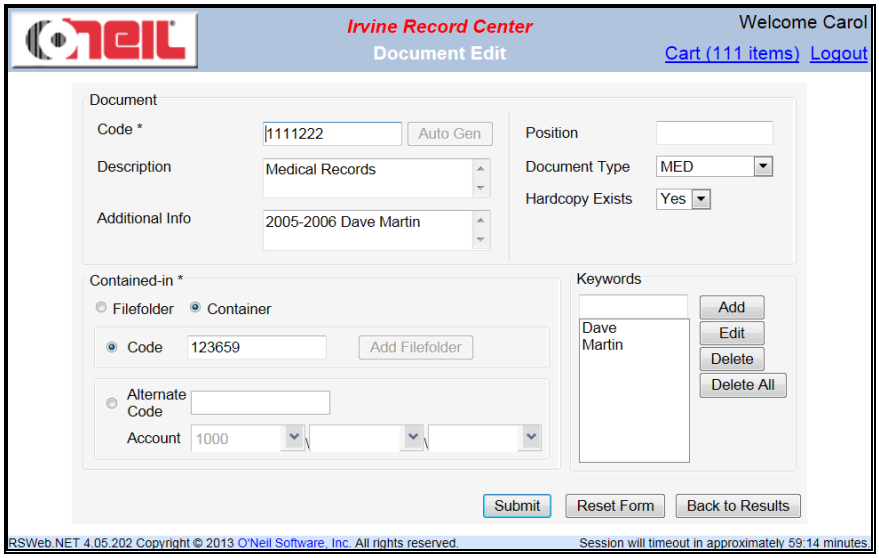
Click **Submit** to save the new document.

Edit Existing Documents

Data for existing documents can be edited using RSWeb. Once data is edited or added and submitted, it is changed in the database at the record center.

To edit data for a document, you must first load the document onto the grid. When the document is loaded and has been selected, from the **Options** menu, select **Edit**. The Document Edit form appears.

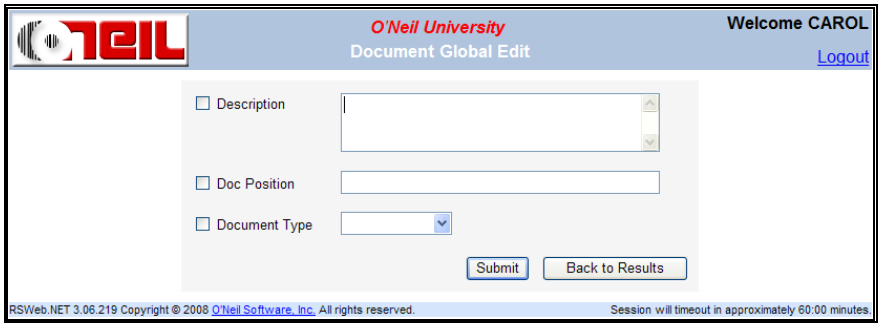
NOTE: You can also bring up the Edit form by double clicking on an item in the grid.



Make your changes or enter new data in the appropriate fields. Some fields contain a drop down list for you to select from. Once you have completed the fields, click **Submit**.

Global Edit Documents

Global Edit is used when you want to edit several items at once. Make sure all the documents you want to edit are selected on the grid, and from the **Options** menu, select **Global Edit**. The Document Global Edit form appears.



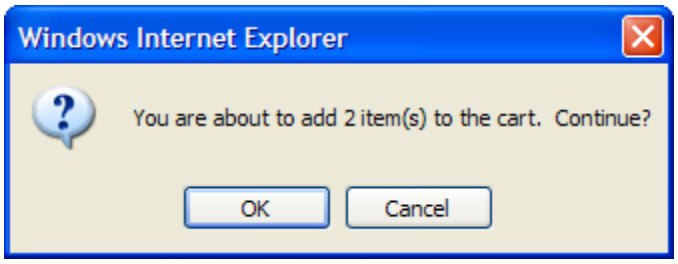
Because any information you enter in this dialog will affect more than one item, no document information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for a document.

To global edit a field, first select the check box next to the field name. Next, enter the information you want to appear in that field for all the documents. Be aware that if a check box is selected but the field is left blank, the field will be edited to blank for all documents. Only select the check boxes for the fields you want to edit.

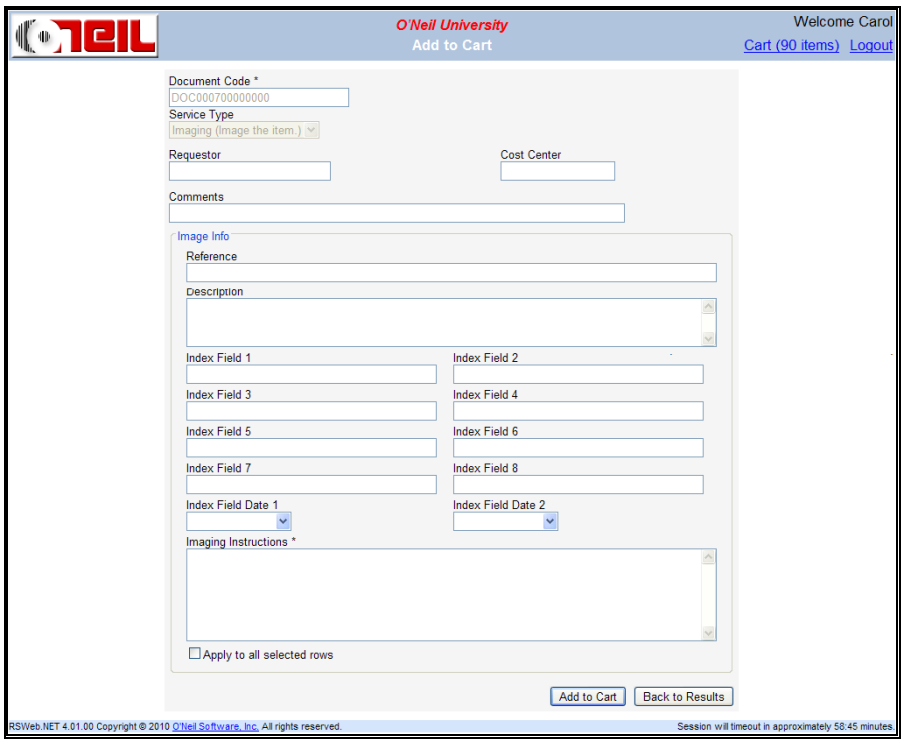
When you have finished making changes, click **Submit**. The changes are made and you are returned to the **Document** grid.

Add Document Imaging Requests to Cart

Individual documents cannot be ordered for delivery in RSWeb. However, you can request that an image be made of the document that you can then view in RSWeb. To add a document imaging request to the cart, from the **Options** menu, select **Add Document Imaging Requests to Cart**. The following prompt displays.

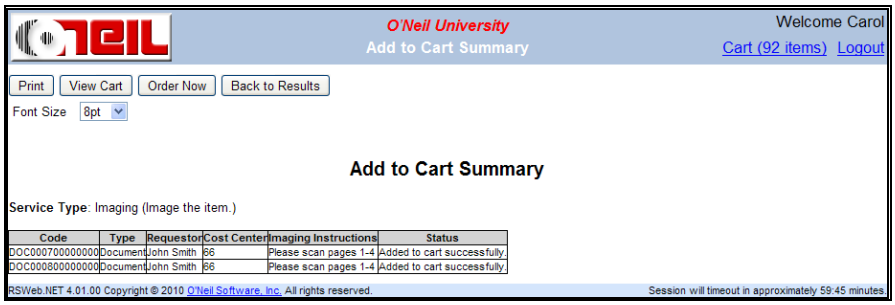


Click **OK** to continue.



Complete the fields. Imaging Instructions is a required field. If you are adding more than one document imaging request to the cart at the same time and you want the information entered here to apply to all the items, select the *Apply to all selected rows* check box. Otherwise, when you click **Add to Cart**, each additional request displays so you can enter the information individually.

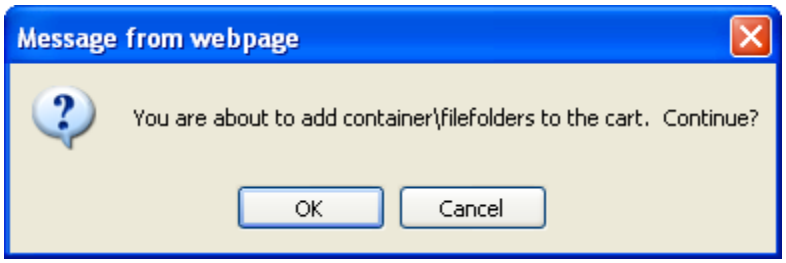
When you have completed the fields, click **Add to Cart**.



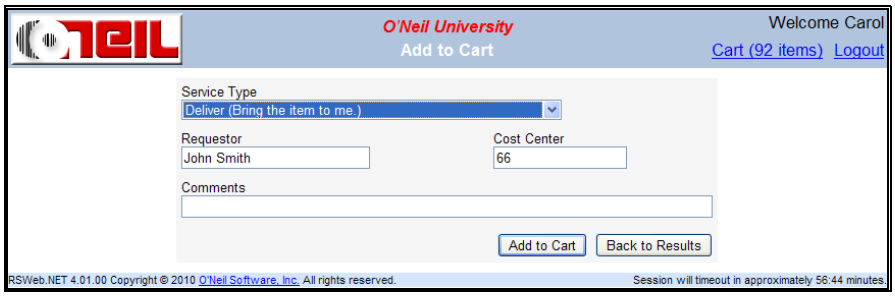
The imaging request is added to the cart.

Add FF/Container to Cart

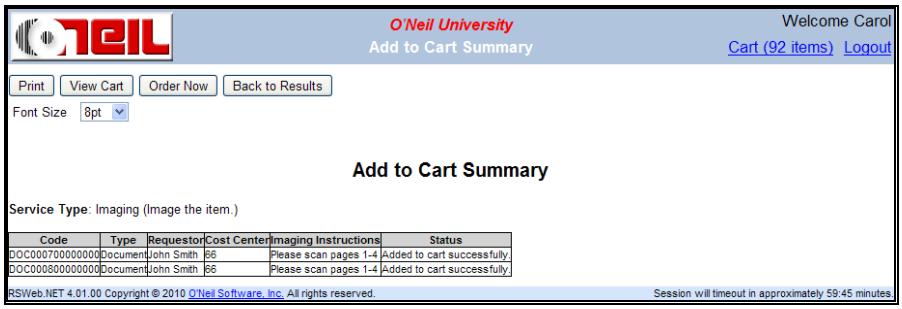
Individual documents cannot be ordered for delivery in RSWeb. However, you can order the filefolder or container that contains the document. From the **Options** menu, select **Add FF/Container to Cart**. The following prompt appears.



Click **OK** to continue.



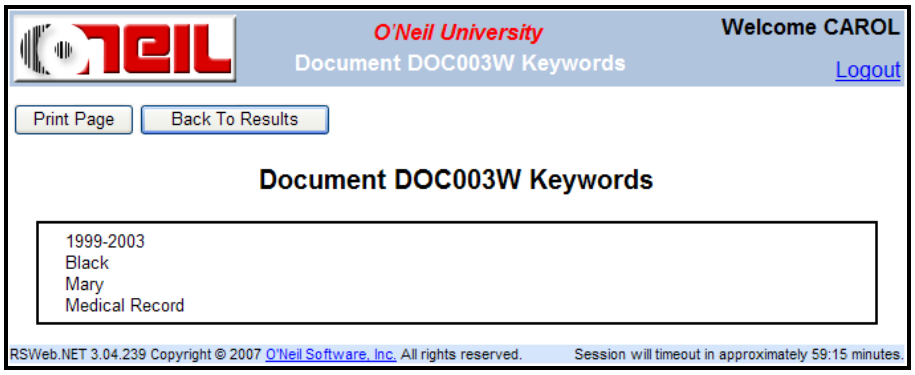
Complete the fields and click **Add to Cart**.



The filefolder or container is added to the cart.

View Keywords

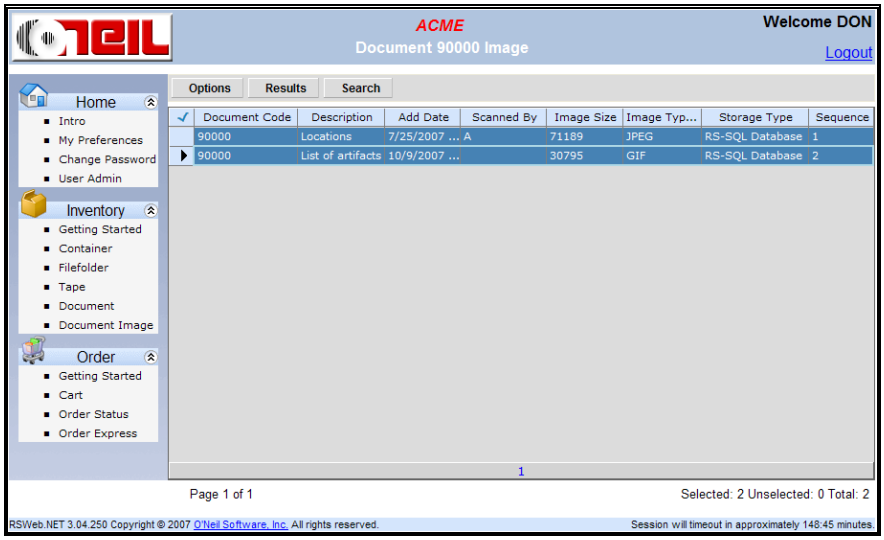
To view keywords for a document, from the **Options** menu, select **View Keywords**.



Click **Back to Results** to return to the **Document** grid.

List Images

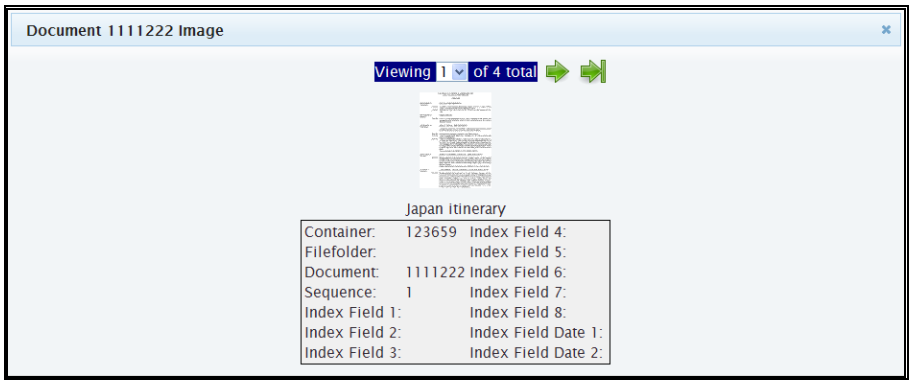
An image of a document can be scanned and stored in the database for viewing in RSWeb. The **Image** menu takes you to the **Document 'xyz' Image** grid which displays a list of all images that have been scanned for the selected document.



From this grid, you can then edit, delete, view or print the image. For more information on these menu options, see the *Document Image* section.

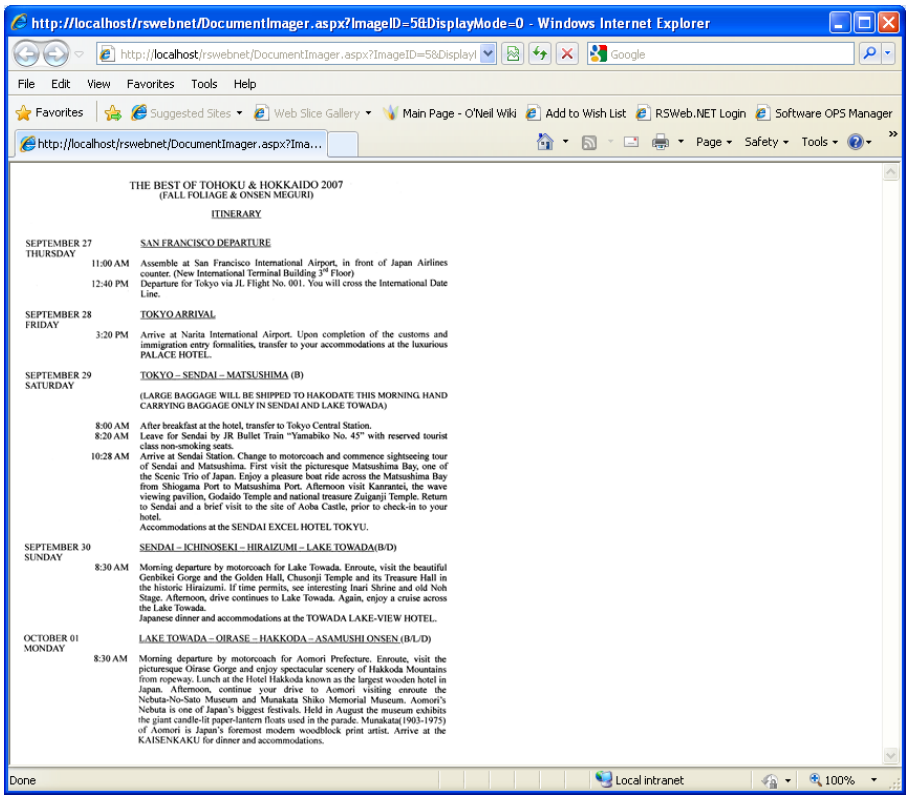
View Images

The **View Image** menu option allows you to view the images for the selected document.



A thumbnail view of the image displays. The document the image belongs to displays at the top of the screen. If you selected multiple images in the grid, you can use the arrows to move between the images.

Click the thumbnail to view the image in its original size and proportion. You can choose to open the file or save it to your computer. The file opens in your browser.

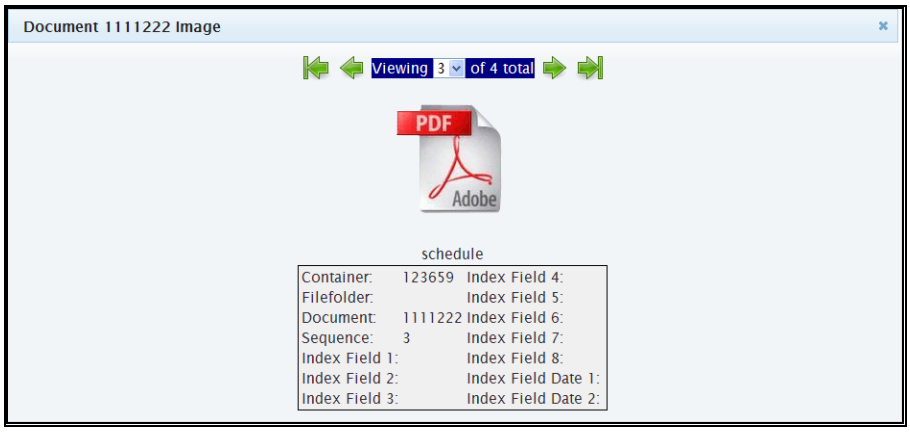


You can then zoom in by clicking on the image, and scroll to view the entire document.

When you have finished viewing the images, close the Image Viewer to return to the **Document** grid.

Viewing a PDF File

If the image is a PDF, there will not be a preview of the image. A PDF icon appears instead.

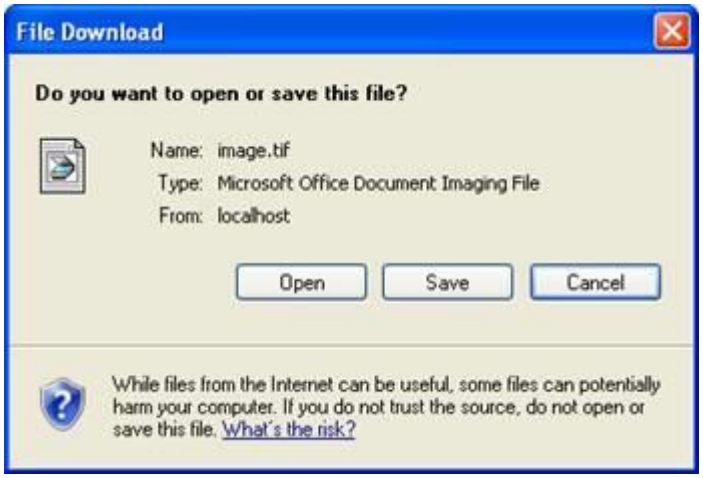


Click the PDF icon or the **View Original** button to open the image. Click **Download** to download the image to your computer.

NOTE: You must have Adobe Reader installed to view the image.

Viewing a TIFF File

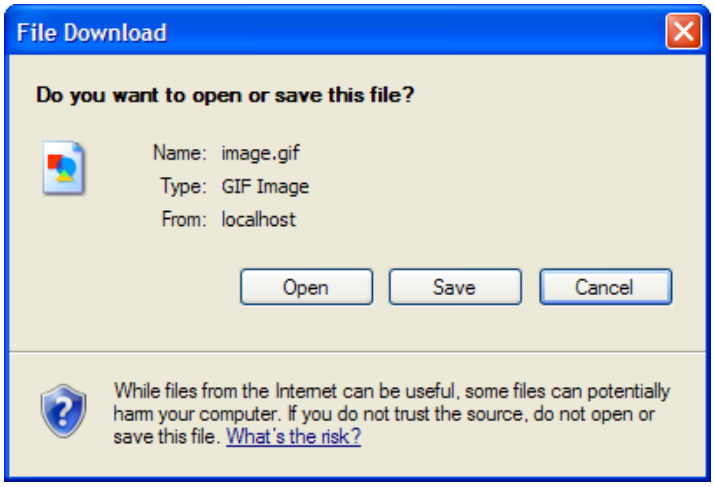
If the image is a TIFF file you will see a preview of the image. When you click the image or the **View Original** button, the following dialog appears.



Click **Open** to save the image to a temporary folder, and then display the image.

Viewing a GIF File

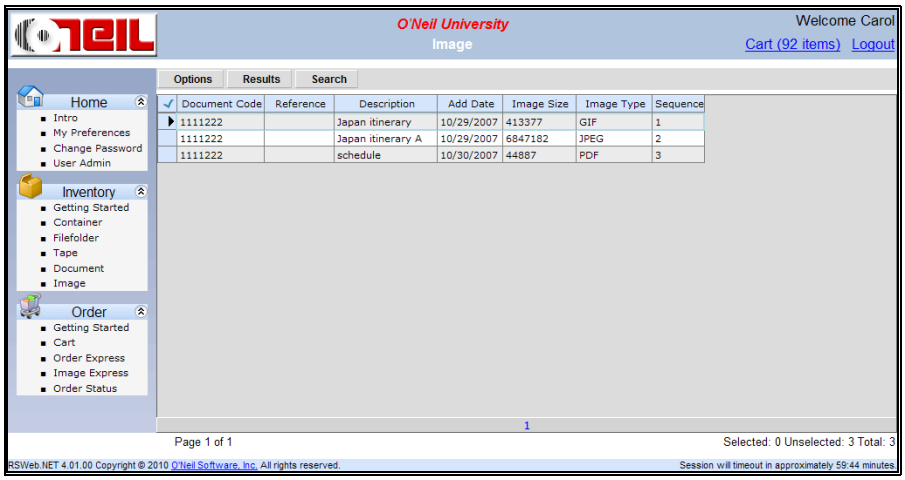
If the image size is larger than 13.1 megapixels, it will not display. Instead, you receive the following dialog.



Click **Open** to save the image to a temporary folder, and then display the image.

Image

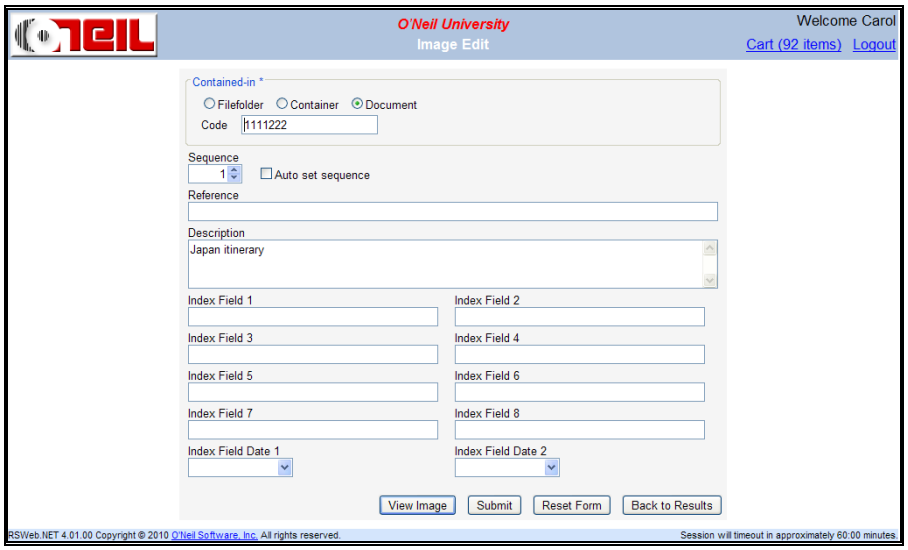
An image of a container, filefolder, or document can be scanned and stored in the database for viewing in RSWeb. To view an existing image, click the **Image** menu. The **Image** grid allows you to view images for multiple containers, filefolders, or documents.



Search for the containers, filefolders, or documents whose images you want to view.

Edit

The **Edit** menu allows you to edit certain information regarding an image. You cannot, however, edit the image itself.



Contained-in: You can change the contained-in location of an image. Select Filefolder, Container, or Document and enter the Code.

Sequence: Sequence is used to identify what order multiple images appear in.

Auto set sequence: Select this check box if you want the system to automatically increment the sequence as images are added.

Reference: This field allows you to type some sort of identifier that can help group a set of images together.

Description: This is a description of the document.

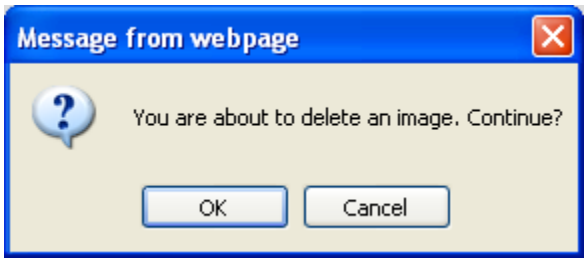
User Defined Fields: Text of your choice can be entered in the user defined fields. There are eight text fields and two date fields available.

To view the image you are editing, click **View Image**. The **Reset Form** button resets the displayed data back to its original value before any editing was done.

To save your changes, click **Submit**.

Delete

To delete a document image, click the **Delete** menu option. The following prompt appears.

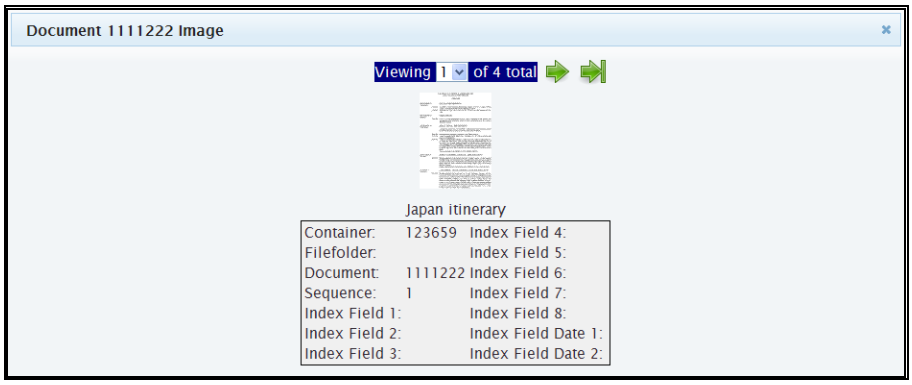


Click **OK** to delete the image.

NOTE: If more than one image exists for the document, only the selected image is deleted. There is no global delete function available for images.

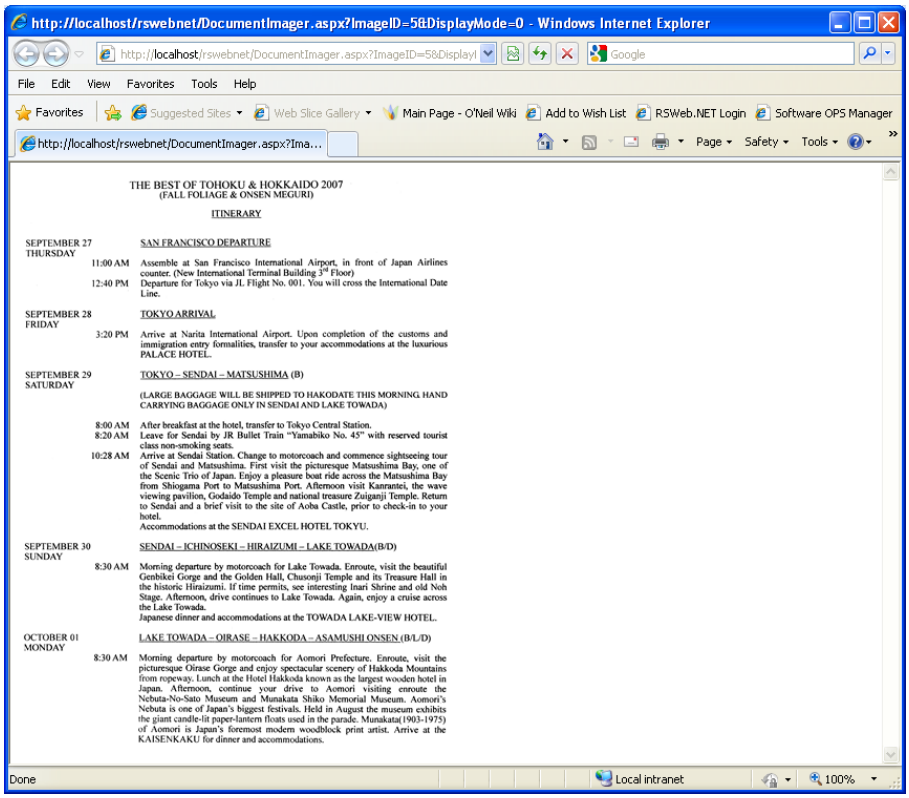
View Image

The **View Image** menu option allows you to view the image.



A thumbnail view of the image displays. The document the image belongs to displays at the top of the screen. If you selected multiple images in the grid, you can use the arrows to move between the images.

Click the thumbnail to view the image in its original size and proportion. You can choose to open the file or save it to your computer. The file opens in your browser.

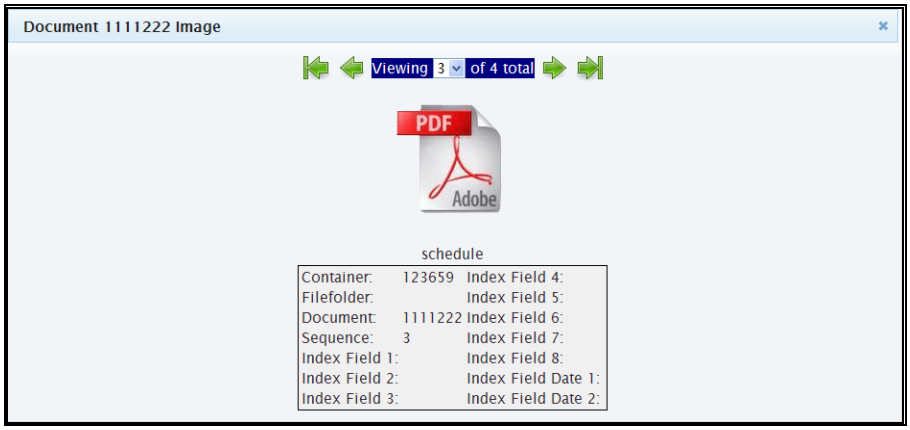


You can then zoom in by clicking on the image, and scroll to view the entire document.

When you have finished viewing the images, close the Image Viewer to return to the **Document** grid.

Viewing a PDF File

If the image is a PDF, there will not be a preview of the image. A PDF icon appears instead.

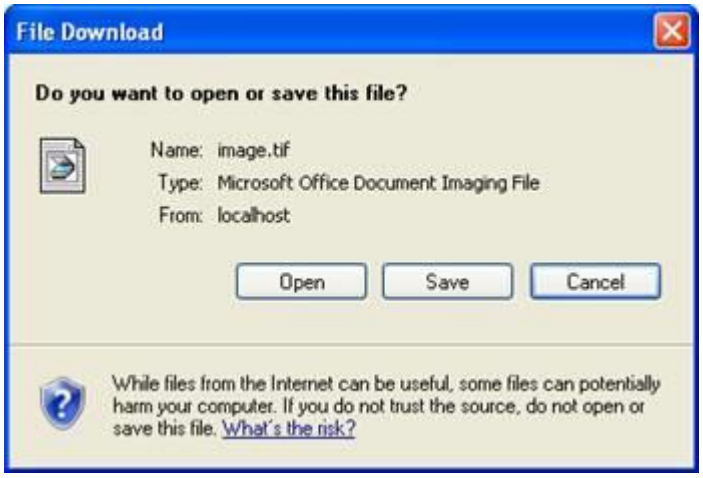


Click the PDF icon or the **View Original** button to open the image. Click **Download** to download the image to your computer.

NOTE: You must have Adobe Reader installed to view the image.

Viewing a TIFF File

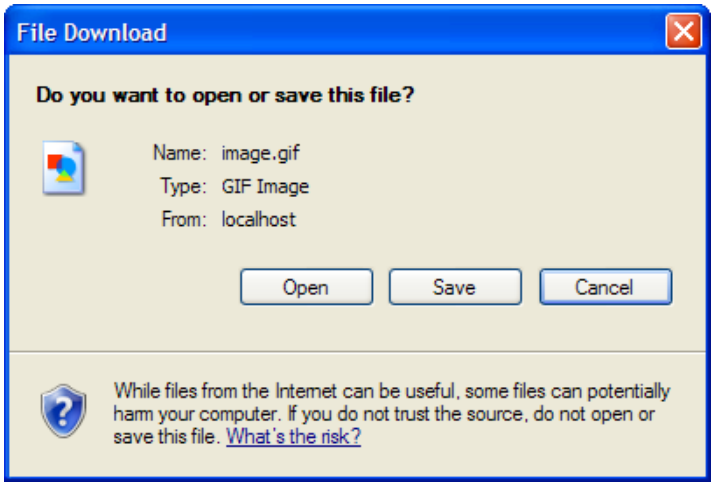
If the image is a TIFF file you will see a preview of the image. When you click the image or the **View Original** button, the following dialog appears.



Click **Open** to save the image to a temporary folder, and then display the image.

Viewing a GIF File

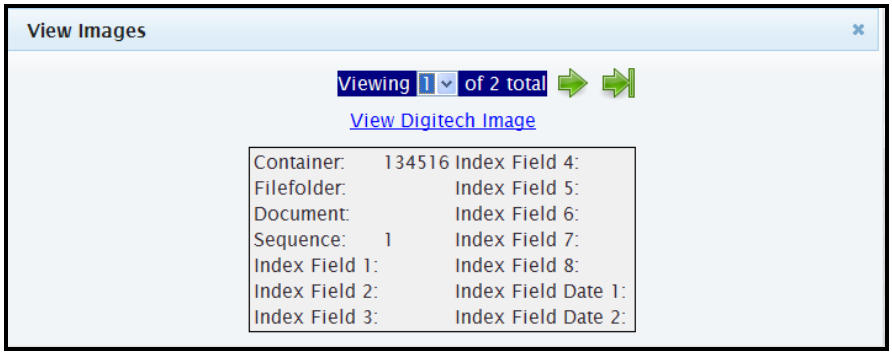
If the image size is larger than 13.1 megapixels, it will not display. Instead, you receive the following dialog.



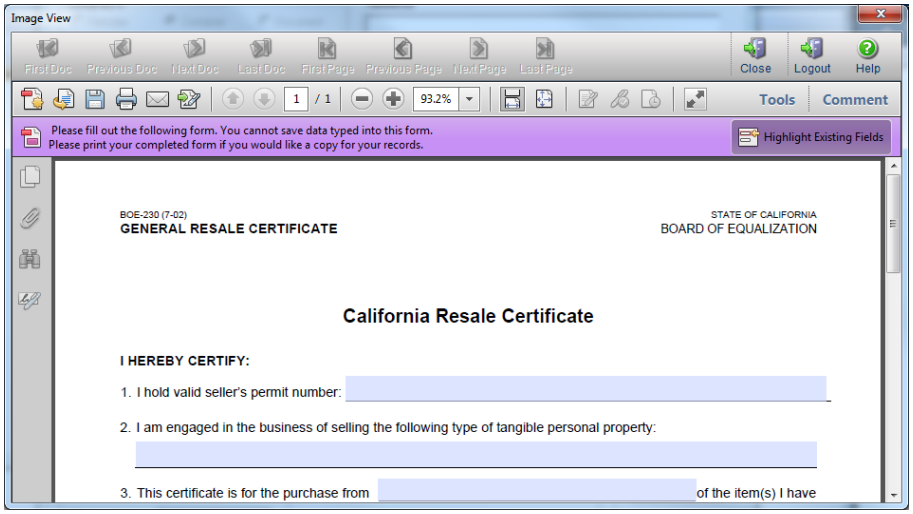
Click **Open** to save the image to a temporary folder, and then display the image.

Viewing a Digitech Image

If the image is a Digitech image, a link is provided to the image.



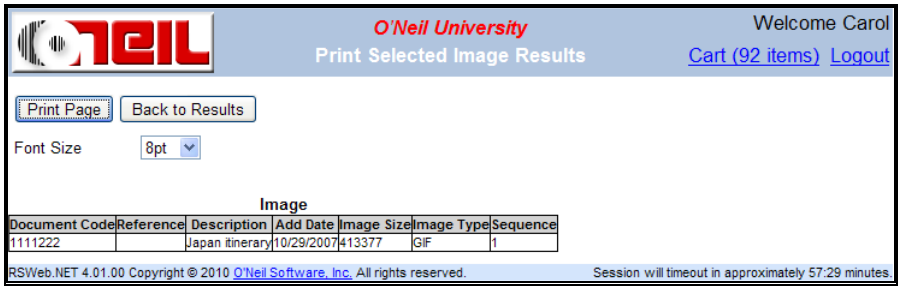
Click the link and the ImageSilo viewer opens and displays the image.



Click the **X** in the top right corner to close the ImageSilo viewer.

Print

To print a list of image information, select the images and from the **Options** menu, select **Print**. The following print dialog appears.



Click **Print Page** to print the image information. Click **Back to Results** to return to the **Image** grid.

Order

Introduction

Ordering products and services from your record center through RSWeb is the heart and soul of the software. This is where you go to ask the record center to deliver those backup tapes to your facility. It's here that you go to order more boxes for all those files that need to go into storage. And when you need to have all those neatly packed boxes taken back to the record center, this is the place to arrange it.

Getting Started

The **Getting Started** menu option provides an overview of the Order options as well as links to some of the most commonly used features.

Cart

The Cart works similar to the shopping cart feature that you may have used on many shopping websites. You can load items into the cart and then when you are ready to place an order, select the items you want included and create an order or workorder. Items remain in your cart until you remove them or until they are placed on an order or workorder. The cart can contain requests for deliveries, pickups, materials, reports, services, or imaging requests.

NOTE: The cart only applies to the user logged in. So each user will have their own cart containing only the items they have added. Items remain in the cart after you log out, so they will still be there the next time you log back in.

The Cart link in the top right corner of the screen shows the number of items (Quantity in Cart) in the cart and provides quick navigation to the Cart page.

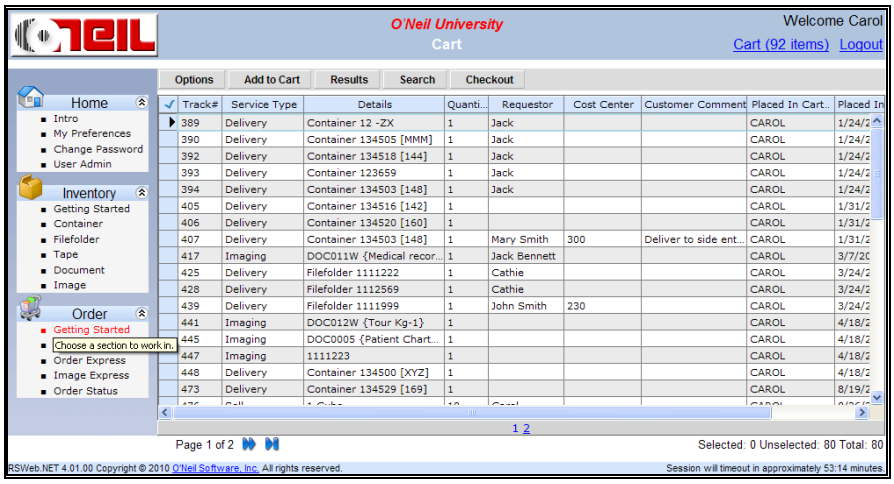
The Quantity in Cart displayed is the actual number of items in the Cart and not the number of items in the **Cart** grid. If you clear (not remove) some items in the **Cart** grid, the Quantity in Cart is not changed as the items are still in the Cart. The items are temporarily cleared from the **Cart** grid and can be loaded into the Cart again. Removing items from the Cart changes the Quantity in Cart as the items are deleted from the Cart. Placing web orders/workorders (which removes items from the cart), also updates the Quantity in Cart.

The tooltip of the Cart link in the header shows the last updated date/time of the Quantity in Cart.

Clicking on the Cart link in any part of the web site navigates to the **Cart** grid. If you are already in the **Cart** grid, clicking the Cart link reloads all the items in the Cart to the **Cart** grid.

Add Items to Cart

To access the Cart, from the **Order** menu, select **Cart**. The **Cart** grid appears and displays any items that have been added to it.



NOTE: The Cart grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

To add items to the cart, from the **Add to Cart** menu, select the menu option for what you want to add. The options include the following:

Items: This is used for physical items (containers, filefolders, tapes) that you want picked up or delivered. They already exist in the database at the record center.

Bulk Items: This is used when you have containers, filefolders, or tapes that need to go to storage, but they either don't have barcode labels yet or you don't want to list them individually.

Materials: This is used for items that you can purchase (or receive) from the record center. Commonly this includes containers of various sizes and barcode labels.

Services: This includes any miscellaneous services that you might request of the record center.

Reports: This is used for reports that can be ordered from the record center.

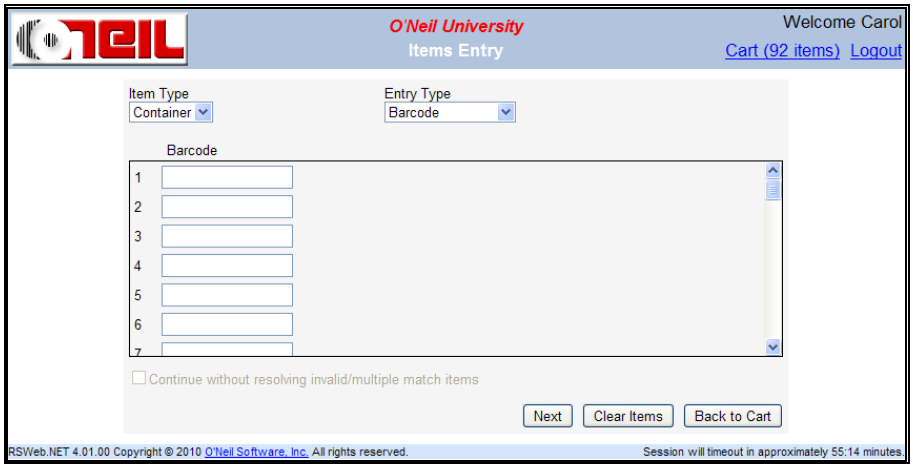
Document Imaging Requests: This is used for requesting an image to be made from a document. The image can then be viewed in RSWeb.

Items

To add items to your cart, from the **Add to Cart** menu, select **Items**. You then have three different menu choices: **Enter Items**, **Search & Select**, **Load from File**.

Enter Items

This menu option is used when you know the Barcode or the Alternate Code and Account for the items you are adding to the cart. From the **Add to Cart** menu, select **Items**, and then **Enter Items**. The following screen appears.



Item Type: Click the drop down arrow and select the type of item (container, filefolder, tape).

Entry Type: Click the drop down arrow and select whether you are going to enter Barcodes or Alternate Codes, or Description if the item is a filefolder or tape.

Barcode or **Alt Code and Account** or **Description**: Enter the barcode for each item. Or, if you selected Alt Code in the Entry Type field, enter the alternate code of each item along with your account if you know it. For filefolders or tapes, you can choose to enter a description. Use the **Tab** key to move between fields.

The Barcode is the barcode label that is attached to the item. The record center uses a laser scanner to scan that barcode every time the item is moved, so their RS-SQL software can always identify and locate it.

The Alt Code is the internal identifier that you gave the item for your own identification. If the Alt Code has been entered into the record center's software, the software can use it, along with your account information to identify the container.

RSWeb and the RS-SQL software that your record center uses identify account in three levels. The Level 1 Account usually refers to your company. The Level 2 Account usually refers to a department within your company. Then within

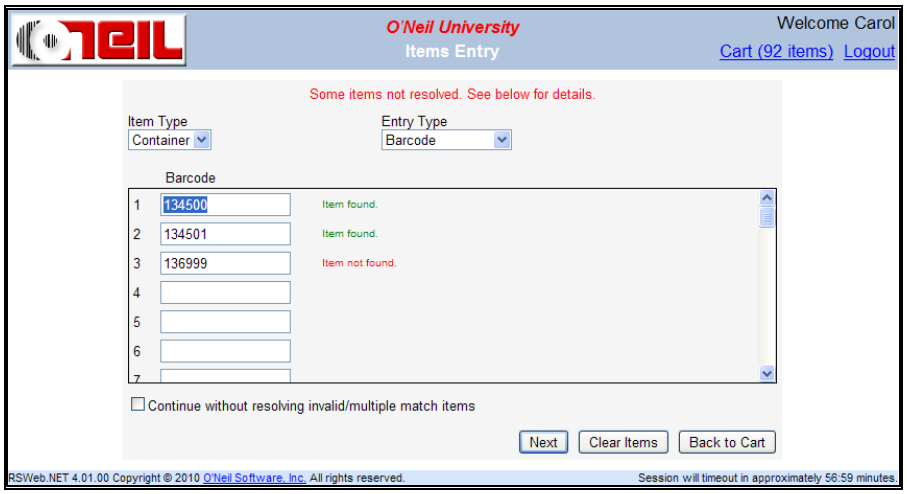
departments, RSWeb can identify a third level, perhaps a cost center, with the Level 3 Account. Your record center may not use all three levels.

If you only enter the Alt Code, there may be more than one item that matches the Alt Code. In this case, the software looks for a possible match. If there is more than one item found for the Alt Code, a link titled 'Select items to add' is displayed to the right of the row. Click the link to go to the **Item Entry Verification** page to select the items to add to the cart. For more information, see the *Item Entry Verification* section later in this chapter.

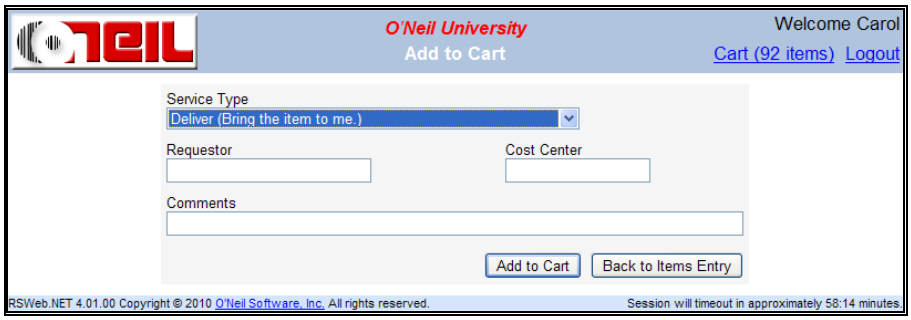
The Description is the text entered in the Description field when a filefolder or tape was added to the system. If you don't know the exact description, you can enter a partial description and use %. RSWeb searches for any description that contains the partial text entered. If there is more than one item found for the description, a link titled 'Select items to add' is displayed to the right of the row. Click the link to go to the Item Entry Verification page to select the items to add to the cart. For more information, see the *Item Entry Verification* section later in this chapter.

NOTE: You can enter up to 50 items at one time.

When all items have been entered, click **Next**.



If any invalid items are entered, you are required to resolve them before continuing on to the next page. For items not found, you can correct the item code or blank out the row. Alternatively, you can select the *Continue without resolving invalid/multiple match items* check box. The unresolved invalid items will display on the **Add to Cart Summary** screen with a description of the error in the Status column. Click **Next** to continue.



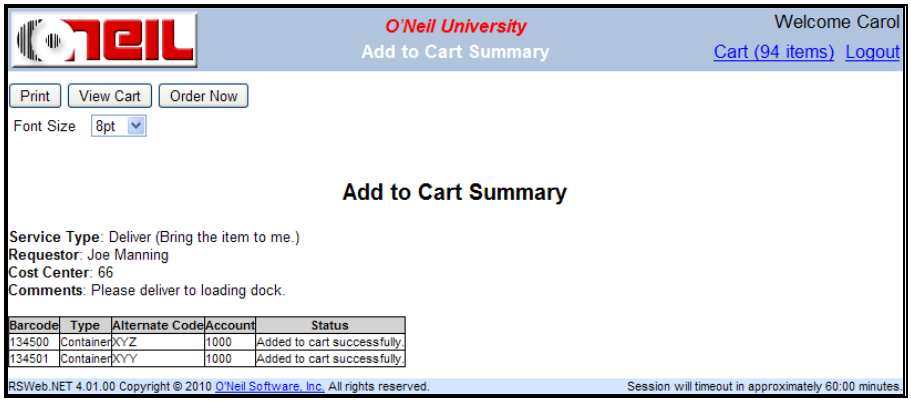
Service Type: Click the drop down arrow and select the type of service you want.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

Comments: Enter any additional comments you want the record center to receive.

Click **Add to Cart** to add the items to the cart. The **Add to Cart Summary** displays.

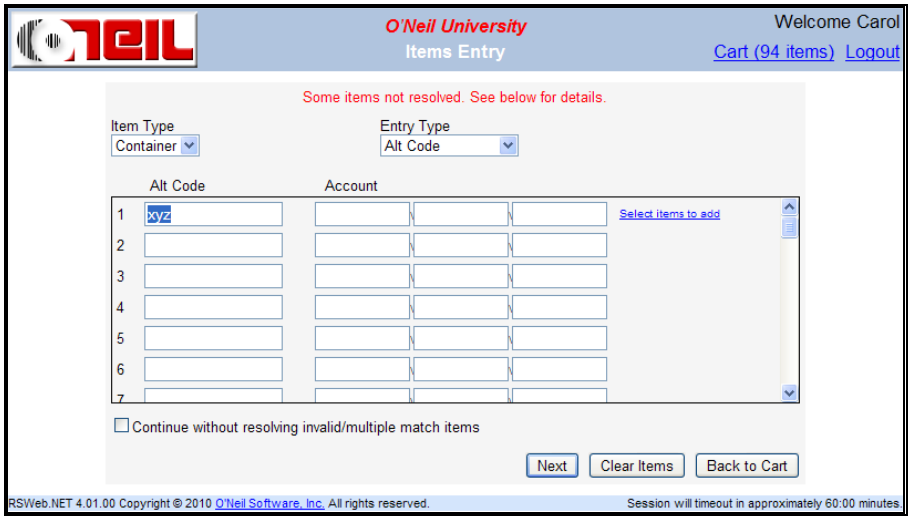


If an item cannot be added to the cart, a message is displayed.

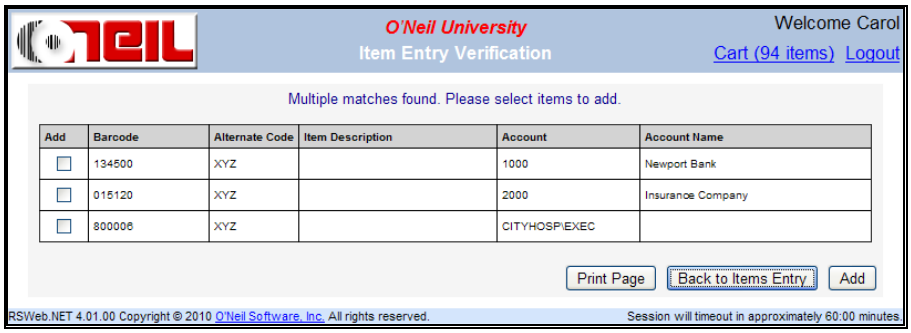
Click **Order Now** to place your order, or click **View Cart** to return to the Cart.

Item Entry Verification

When an Alt Code is entered that belongs to more than one item, the following error message and link appears on the screen.



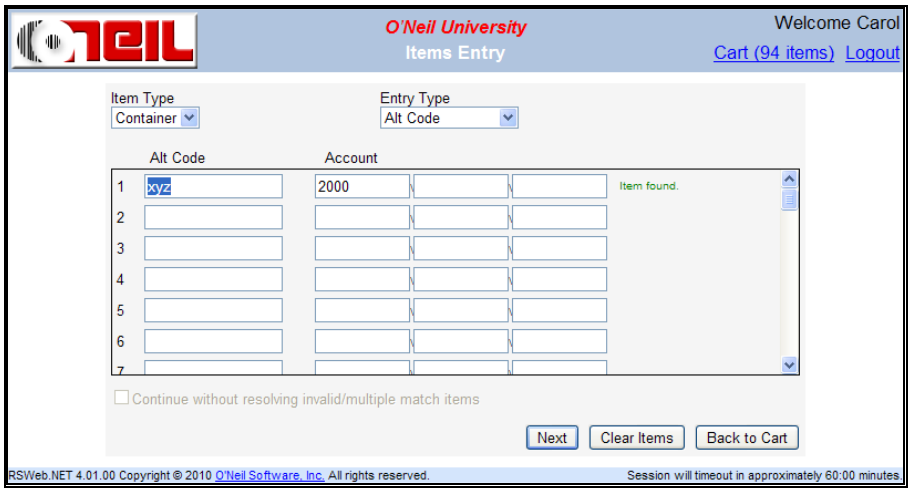
Click the 'Select items to add' link to view the Item Entry Verification screen.



All items with the matching Alt Code display.

NOTE: Only items belonging to accounts you have access to are displayed.

Select the check box in the Add column next to the item or items you want to add. Click **Add** to return to the **Items Entry** screen.

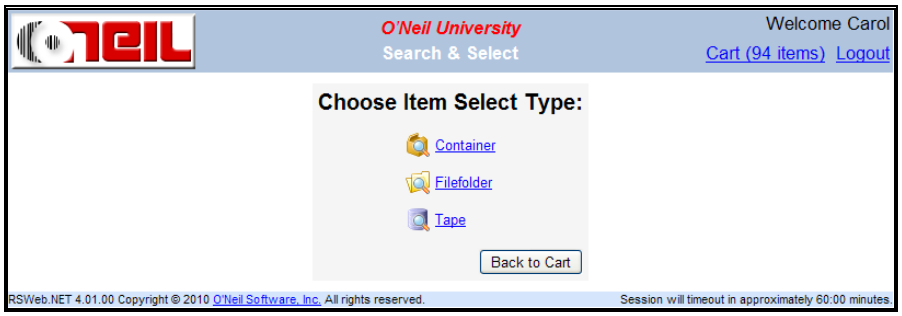


Click **Next** to continue adding your items to the cart.

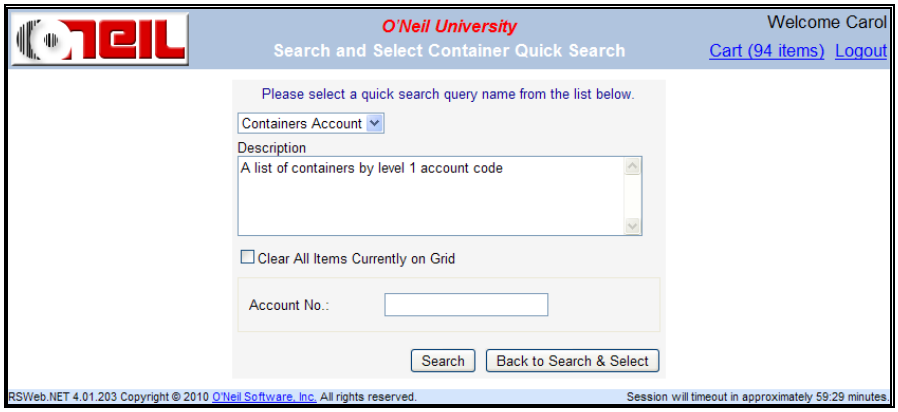
Search & Select

If you will be adding several items to your order, you may want to use the **Search & Select** feature. Using **Search & Select** you can specify your criteria, view the results of your search, and determine which items to add to the cart.

From the **Add to Cart** menu, select **Items**, and then **Search & Select**. The following screen appears.



Select whether you want to search for Containers, Filefolders or Tapes. A screen similar to the following appears.



Click the drop down arrow next to the list of quick queries to make your selection. A description of the quick query displays in the Description field. Depending on the quick query selected, additional fields may display for you to enter data.

Select the *Clear All Items Currently on Grid* check box if you want to clear all existing items from the grid before your results are returned. Otherwise, the new results will be added to the existing items already on the grid.

When you have made your selection and entered any required data, click **Search**. The query runs and all data matching the criteria is loaded onto the grid.

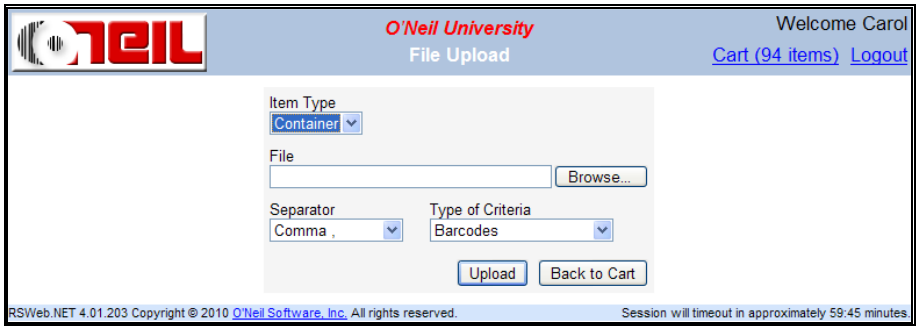
When the results you want have been added to the **Search & Select** grid, you can select them and add them to the cart.

Load from File

You have the ability to submit Web orders for a list of items by loading the list from an external text file.

NOTE: The maximum number of upload rows allowed is determined by your record center.

From the **Add to Cart** menu, select **Items**, and then **Load from File**.



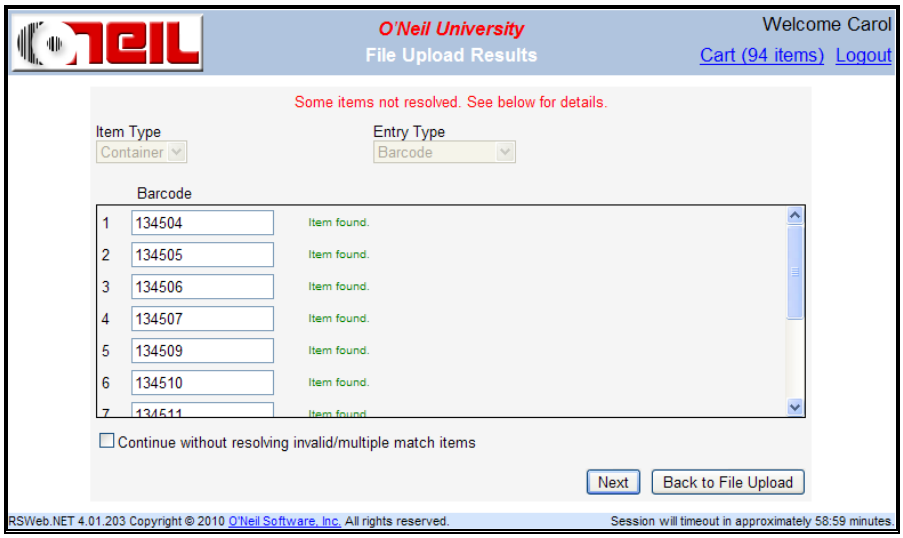
Item Type: Click the drop down arrow and select the type of item (container, filefolder, tape).

File: Type the name and path of your file, or click **Browse** to locate the file.

Separator: Click the drop down arrow and select the separator type. This is what separates the fields of data in your file.

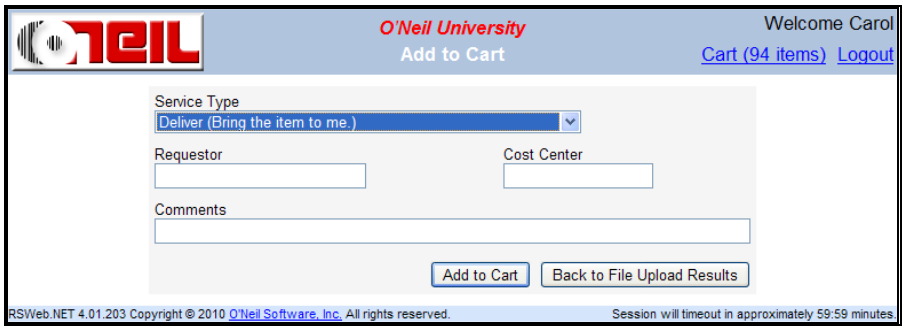
Type of Criteria: Click the drop down arrow and select the type of criteria used in your file.

Click **Upload**.



The **File Upload Results** screen displays indicating if any errors occurred.

If any invalid items are entered, you are required to resolve them before continuing on to the next page. For items not found, you can correct the item code or blank out the row. Alternatively, you can select the *Continue without resolving invalid/multiple match items* check box. The unresolved invalid items will display on the **Add to Cart Summary** screen with a description of the error in the Status column. Click **Next** to continue.



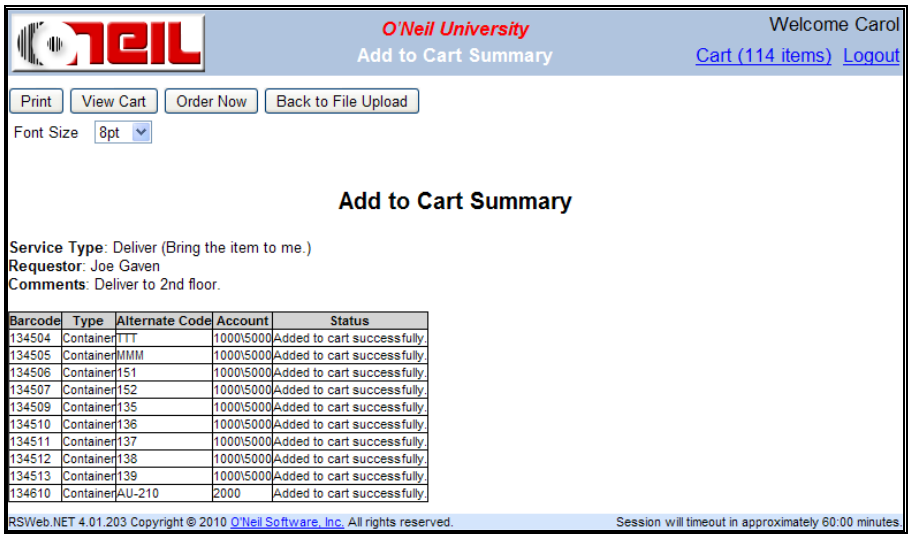
Service Type: Click the drop down arrow and select the type of service you want.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

Comments: Enter any additional comments you want the record center to receive.

When you have entered all information, click **Add to Cart** to add the items in the file to the cart.

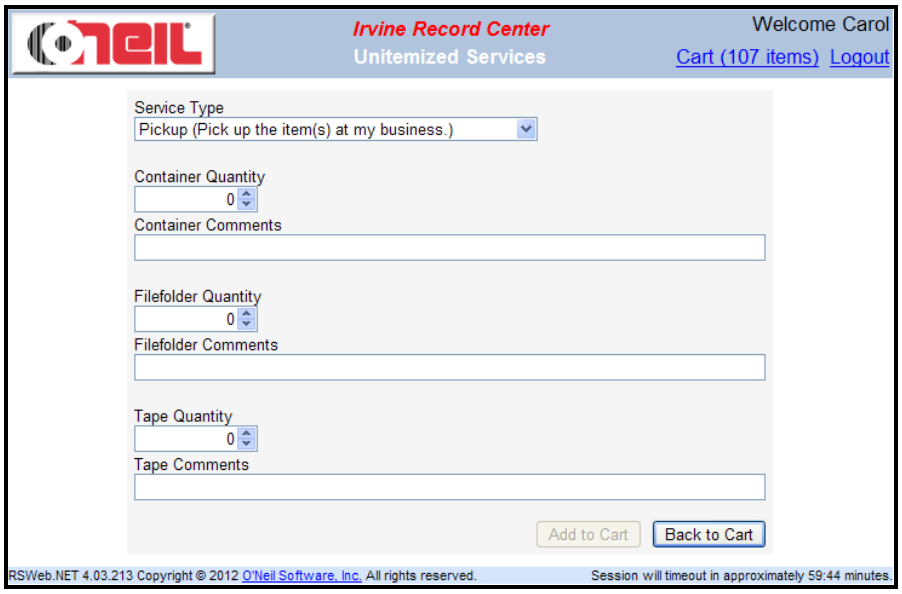


Click **Order Now** to place your order, or click **View Cart** to go to the cart. The items added to the cart are selected so they are easily identifiable.

Bulk Items

This menu option is used when you have containers, filefolders, or tapes that need to go to storage, but they either don't have barcode labels yet or you don't want to list them individually. It can only be used for items you want the record center to pick up or items you are going to drop off at the record center.

From the **Add to Cart** menu option, select **Bulk Items**.



Service Type: Use the drop down arrow and select whether you want the record center to come pick up the items, or whether you are going to take the items to the record center.

Quantity: Enter the number of containers, filefolders, and tapes that are going to the record center. This allows the record center to make sure they have enough space in the truck. If you are dropping the items off at the record center, they may need to plan how much assistance you will need. The maximum quantity allowed is

determined by your record center. If you enter a number larger than the maximum, the field is changed to the maximum quantity and an error message displays at the top of the page.

Comments: When adding bulk items to the cart, you can describe the item by entering container, filefolder or tape comments. These comments are then transferred to the final workorder. You can enter a single line up to 81 characters. Once the order is checked out to a web order and the record center converts the web order to a workorder, these comments are posted to the Workorder Notes with the web user's name.

When you have finished entering information, click **Add to Cart** and the items are added to the cart.

Materials

Materials are items that you can purchase (or receive) from the record center. Commonly this includes containers of various sizes and barcode labels. Your record center determines what materials are available for ordering.

From the **Add to Cart** menu, select **Materials**.

Material: Click the drop down arrow to select the material you want to order.

Quantity: Enter the quantity you are requesting.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

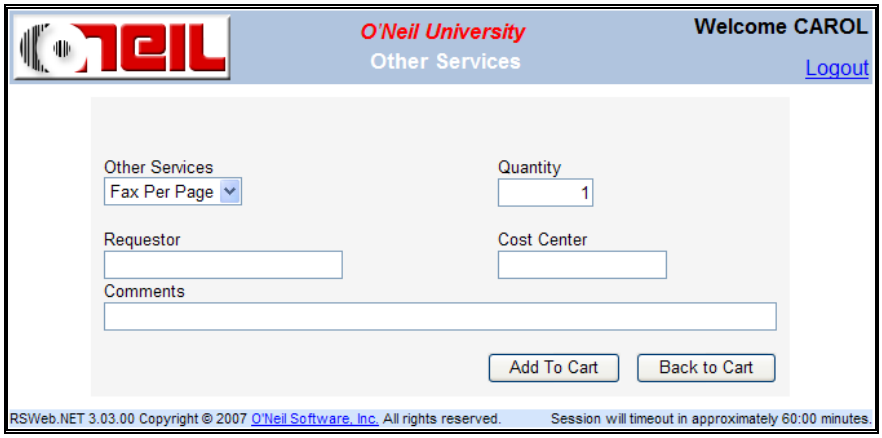
Comments: Enter any additional comments you want the record center to receive.

When you have finished entering information, click **Add to Cart** and the materials are added to the cart. Click **Back to Cart** to return to the cart.

Services

Services are any miscellaneous services that you might request of the record center. Let's say that you need to look at a document that is in a container in the record center, but you really don't need to have the container delivered to you; nor do you really need the original document. You could place an order for the record center to find the document and fax it to you. Your record center will determine what services are available, but they may include things like faxing, photocopying, or repacking.

From the **Add to Cart** menu, select **Services**.



Other Services: Click the drop down arrow to select the type of service you are requesting.

Quantity: Enter the quantity.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

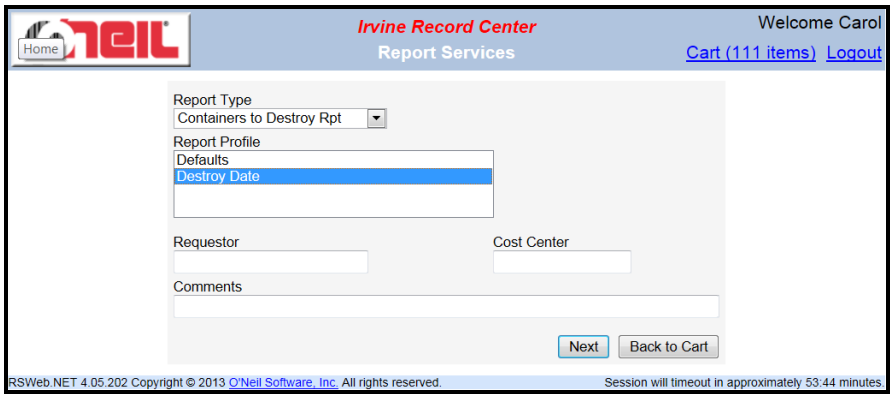
Comments: Enter any additional comments you want the record center to receive.

When you have finished entering information, click **Add to Cart** and the services are added to the cart. Click **Back to Cart** to return to the cart.

Reports

This menu option is used to order reports from the record center. Your record center has taken the time to set up custom report profiles for you. These have been created so that your report displays the information you want and looks the way you want it. You have the options of changing the setting in a profile; however, keep in mind that any changes you make can affect the outcome of your report. For example, changing the font point size or the number of columns displayed may exceed the page width and cause your data to truncate. If a report is not printing out properly for you, contact your record center and they can adjust your profile accordingly.

From the **Add to Cart** menu, select **Reports**.



Report Type: Click the drop down arrow and select the report you want to order.

Report Profile: Select the report profile you want to use. Your record center may create custom profiles for you for each of the reports available. A profile is just a set of printing options that is customized and assigned to a specific report for your convenience. If more than one profile has been created for the report you selected, they appear in this field. You still have the option of making changes to the print options.

Requestor: Enter the name of the person making the request. This field is optional.

Cost Center: Enter a cost center. This field is optional.

Comments: Enter any additional comments you want the record center to receive.

When you have finished entering information, click **Next**. The **Report Detail** screen appears.

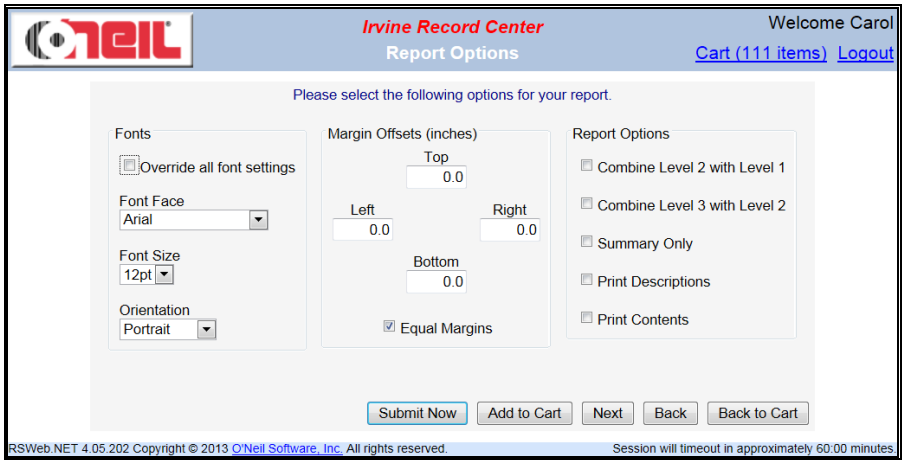
Title: Your record center has given your report a title. If you want to change it, type a new title in the Title field.

Query: Enter the query data. If a customized query has not been assigned by your record center, this section will not appear.

After entering the Title and any Query input, there are several options:

- Click **Submit Now** to skip all other report options, add the report to the cart and go directly to the **Web Order** page.
- Click **Add to Cart** to skip all other report options and add the report to the cart.
- Click **Next** to continue to the **Report Options** page.

The **Report Options** screen for the report and profile you selected appears. The values that have been selected by your record center display, but you can make changes to any field.



Fonts: In the Fonts section, the default font and size display. You can, however, select a different font. Your options are Arial, Courier, Courier New, or Times New Roman. Additional fonts may be available if they were set up by your record center. You can also change the font size to anything between 8 and 12 points. When you make a change to the font, the *Override all default fonts* check box is automatically selected. If you want to override all fonts including column heading and details of the report, leave the box checked. Remember, your record center has set these fonts for you and tested them to make sure they print properly. Next, you can change the orientation to portrait or landscape.

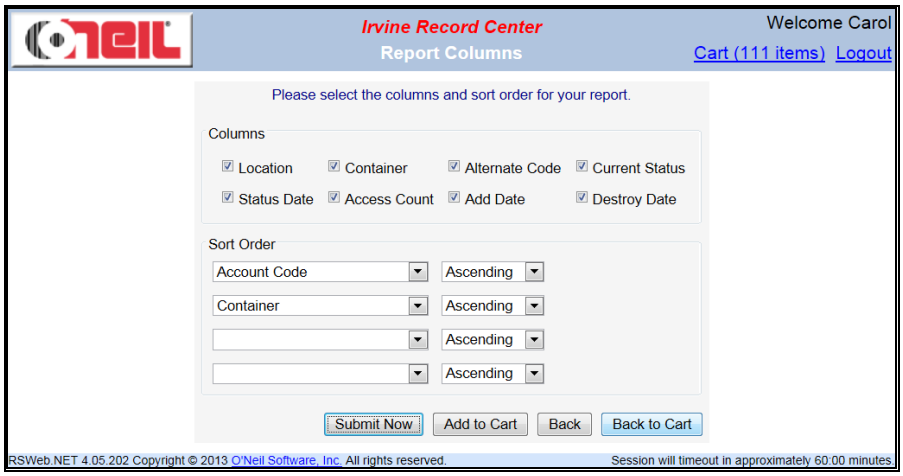
Margin Offsets: The Margin Offsets fields indicate the margins that have been set up for your report. You can change the margins if you want. Click the down arrow next to the field to select the margin you want. If you want all your margins to be the same, select the Equal Margins check box. When selected, if a change is made to one of the margins, the others are automatically changed to match.

Report Options: Select the Combine Level 2 with Level 1 or the Combine Level 3 with Level 2 check box to combine results for the two account levels.

Select the Summary Only check box to print summary information. Select the Print Descriptions check box to include all data in the Description field for each item on the report. Check the Print Contents check box to include all data in the Contents field for each item on the report.

Report Specific Options: This section only displays for certain reports. The available choices will vary depending on the report you have selected.

Once you have made any desired changes, click **Next**. The Report Columns screen appears.



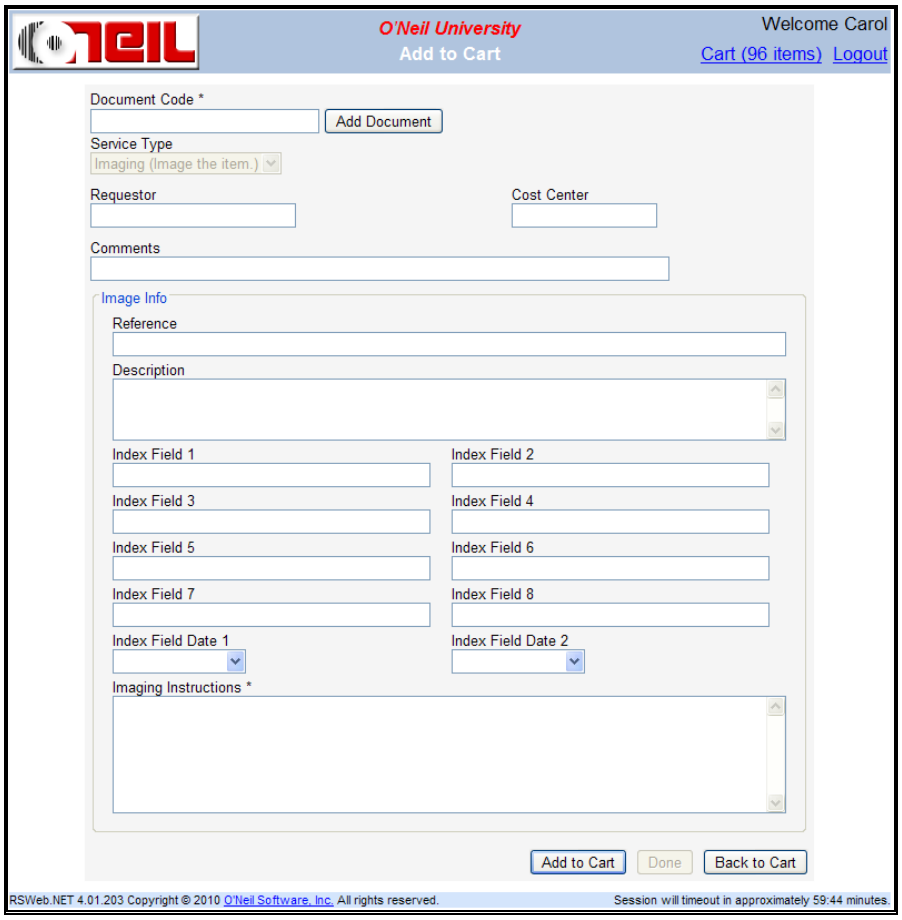
Columns: All the columns that are available for your report are listed in the Columns section. Any column with its check box selected will print. If the check box is cleared, the column will not print on the report. You cannot change the order in which the columns will appear. You can only decide if you want them to print or not.

Sort Order: In the Sort Order section, you can set your report to sort in any order you like, with certain limits. If there are predetermined sort criteria, the first couple fields are filled in and you may not be able to change them. Click the down arrow to the right of the field to see the list of fields that will appear on the report. You can choose to sort by any of them. You can also choose to have the fields sort by ascending or descending order by clicking the down arrow next to that field.

Once complete, click **Add to Cart** to add the report to the cart, or click **Submit Now** to add the report to the cart and go directly to the **Web Order** page.

Document Imaging Request

In the Cart, you can add a request for an image to be made from a document. The image can then be viewed in RSWeb. From the **Add to Cart** menu, select **Document Imaging Request**.



Document Code: Enter the document for which you want an image made. If the document is not already in the database, click **Add Document** to add a new document.

Service Type: This field is populated with the service type Imaging, and is read only.

Requestor: Enter the person requesting the image. This field is optional.

Cost Center: Enter a cost center. This field is optional.

Comments: Enter any additional comments for the record center.

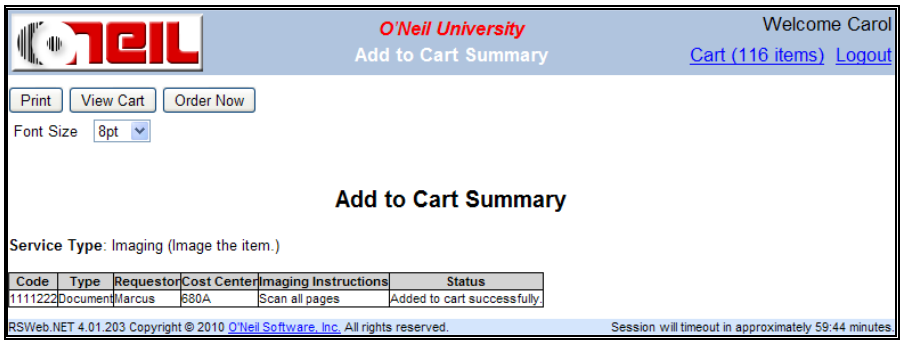
Reference: This field allows you to type some sort of identifier that can help you group a set of images together.

Description: Type a description of the image.

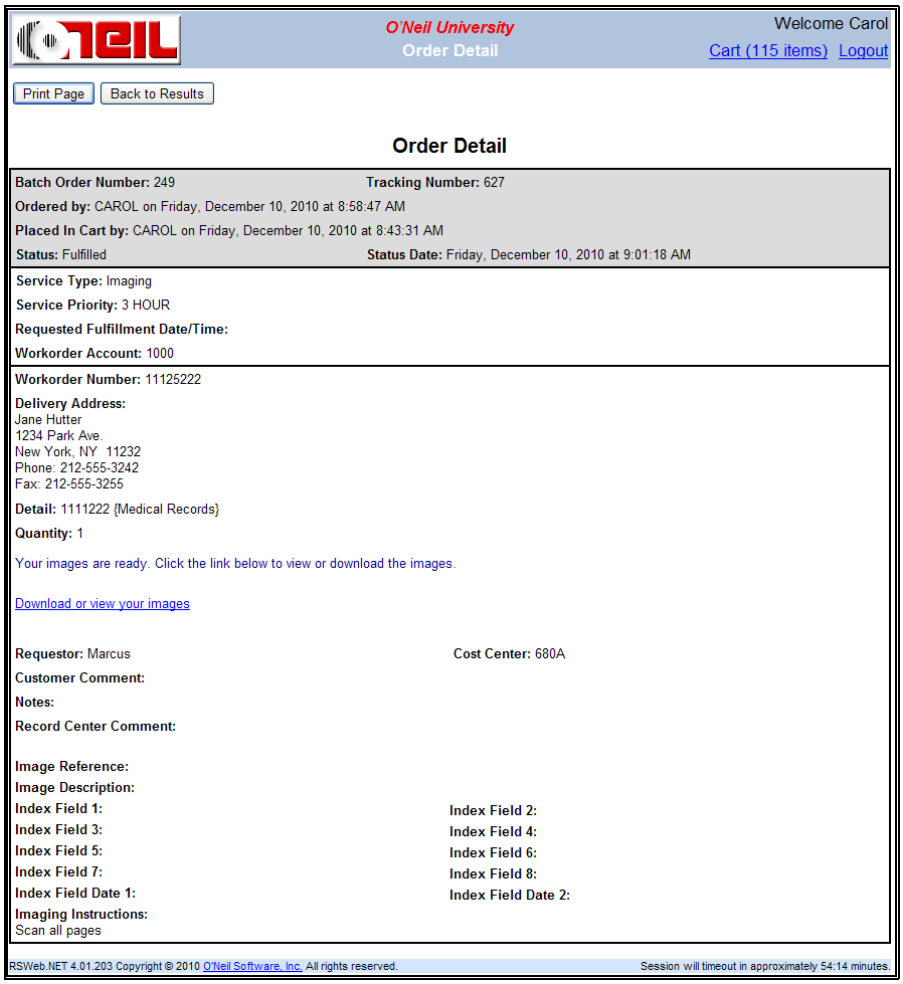
User Defined Fields: Text of your choice can be entered in the user defined fields. There are eight text fields and two date fields available.

Imaging Instructions: Type any special imaging instructions for your record center. This field is required.

Click **Add to Cart** to add the request to the Cart. Add another request, or if you are finished, click **Done**. The request is added to the cart.



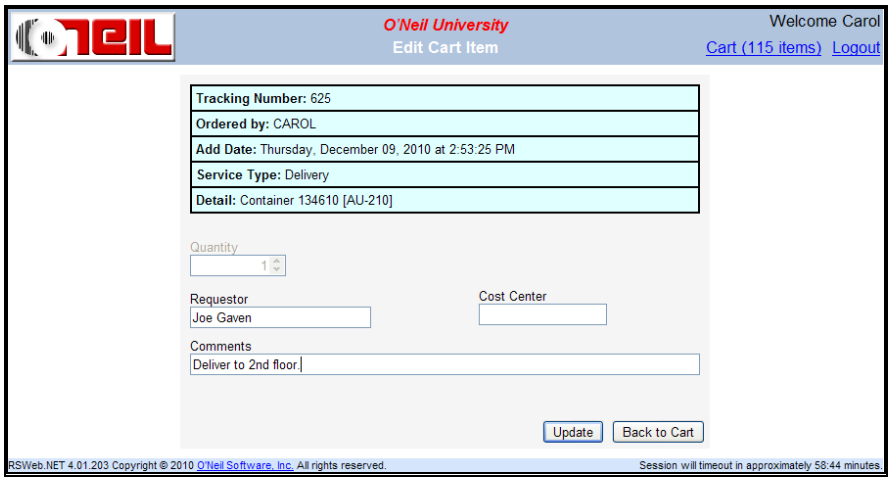
Once your request has been fulfilled by the record center, you can view the image in RSWeb. Load your order onto the **Order Status** grid. If it has been fulfilled, a link appears in the **Order Detail** dialog.



Click the link to download or view your image.

Edit Items in Cart

You can edit some information for items that are placed in the cart. In the cart, select the item and from the **Options** menu, select **Edit**. The following screen appears.



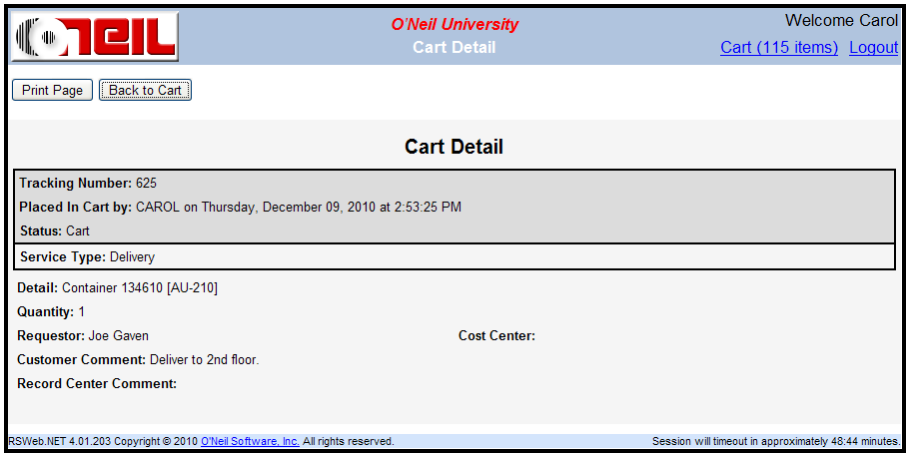
Information regarding the item displays at the top of the screen. This information is read-only. Depending on the type of service you are editing, you may be able to edit the Quantity, Requestor, Cost Center, and Comments fields.

NOTE: If the item was identified with a specific barcode, the Quantity field cannot be changed.

When you have made your changes, click **Update**.

View Details of Items in Cart

To view the details of an item in the cart, from the **Options** menu, select **View Detail**. The following screen appears.



To return to the cart, click the **Back to Cart** button.

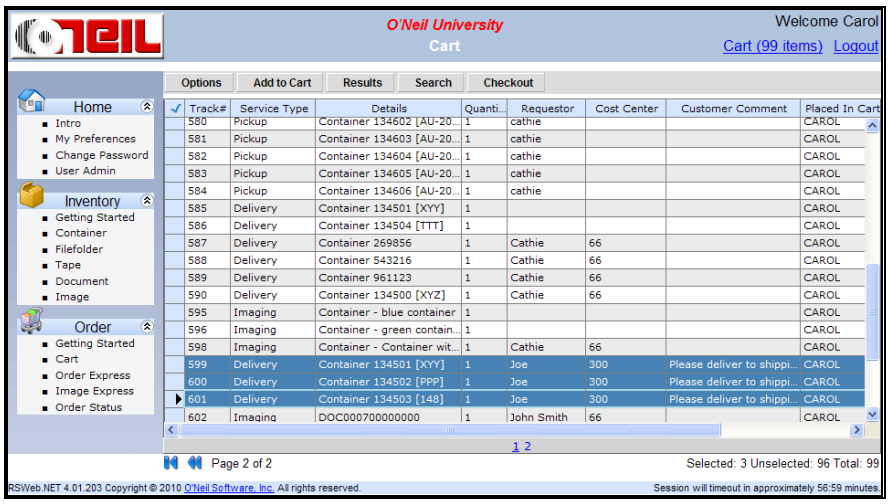
Create Order/Workorder

Once you have added items to your cart, and are ready to place an order, you need to create an order or workorder. This is what actually sends your request to the record center.

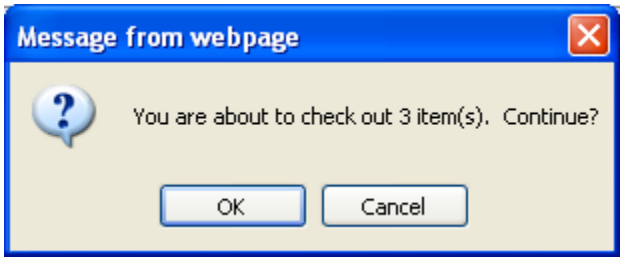
Each item you add to the cart is given a tracking number. Once you create an order or a workorder, a batch number is assigned to that group of orders/workorders. A batch can have one or a number of items assigned to it. Your record center will discuss with you how it uses batches and together you can determine the best way to use them.

Create an Order

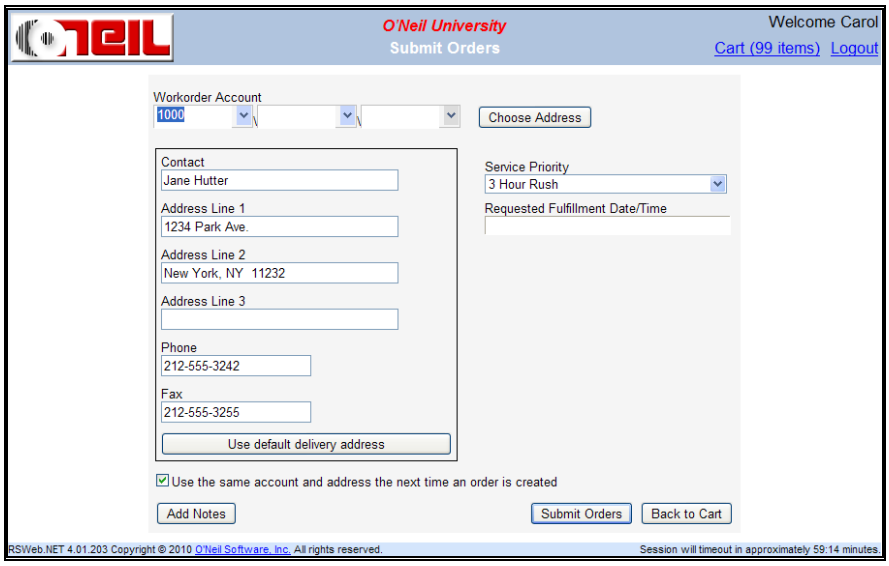
Select the items in the cart that you want included in the order.



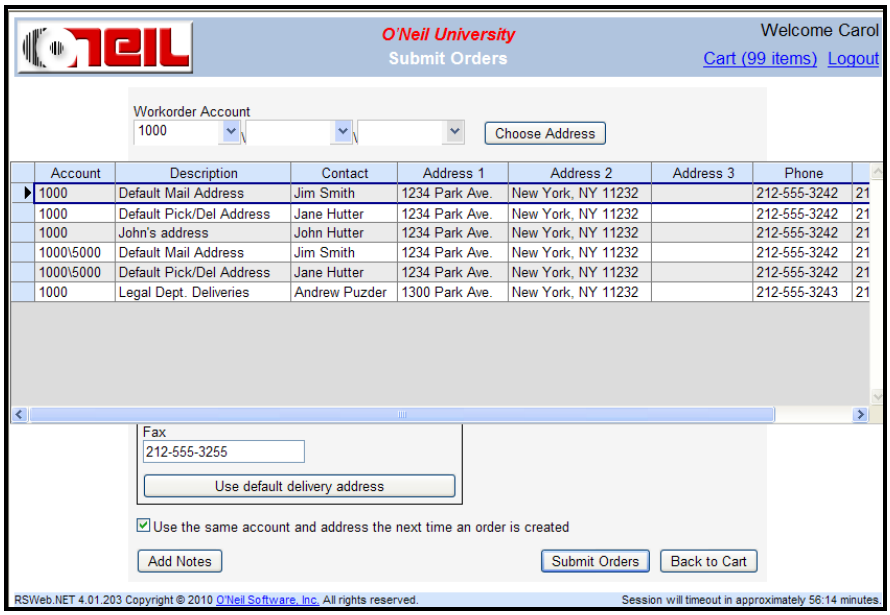
From the **Checkout** menu, select **Order**. The following message appears.



Click **OK** to continue. The following screen appears.

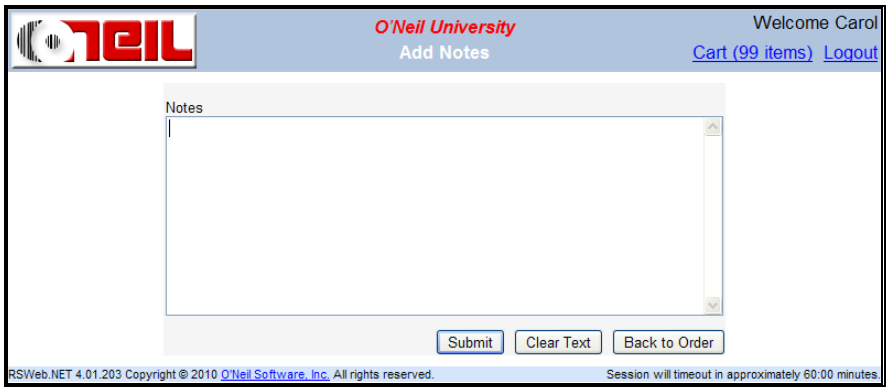


Enter your account number and your contact information. To use the default address for the account entered, click **Use default delivery address**. To choose a different delivery address, click the **Choose Address** button. An address grid is displayed with all available addresses for the account.



Click a row to select that address, and the address fields are automatically populated. If you want to use the same account and address the next time you create an order, select the check box below the address fields.

Click the **Add Notes** button to add any Workorder Notes for the order.



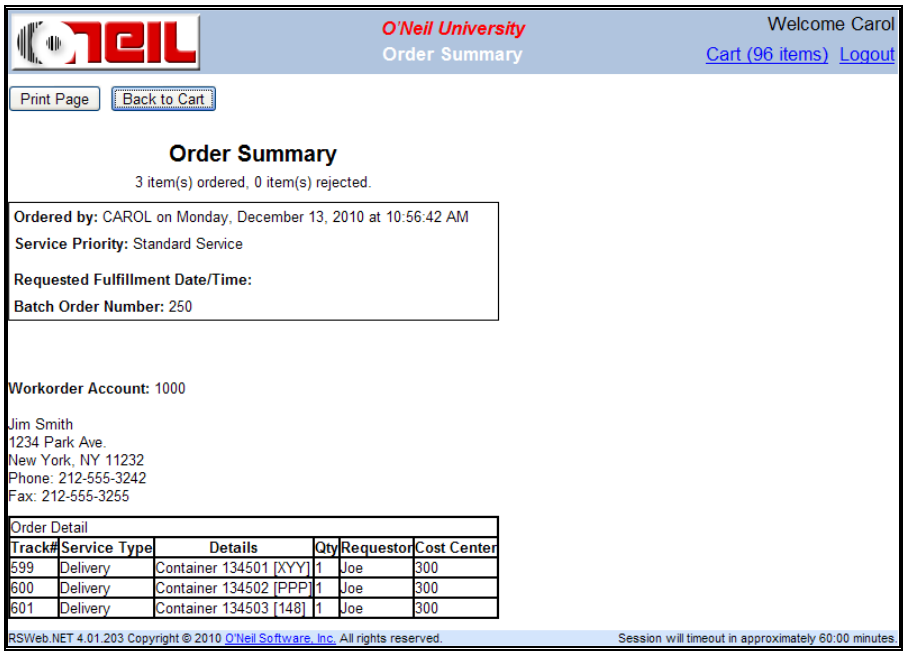
The Notes text box is used to enter notes that describe the Web order. You can enter up to 512 characters.

Click **Clear Text** to clear the text box. This will only take effect if **Submit** is clicked. Click **Back to Order** to cancel the editing and return to the order.

Once you have finished entering your notes, click **Submit** to save the notes. The notes will be added to the Order Summary.

Use the drop down arrow to select a Service Priority. Depending on your selection, the Requested Fulfillment Date/Time may be automatically populated. If not, enter the date and time you require this order.

When you are finished, click **Submit Orders**. The order is submitted and an Order Summary appears.

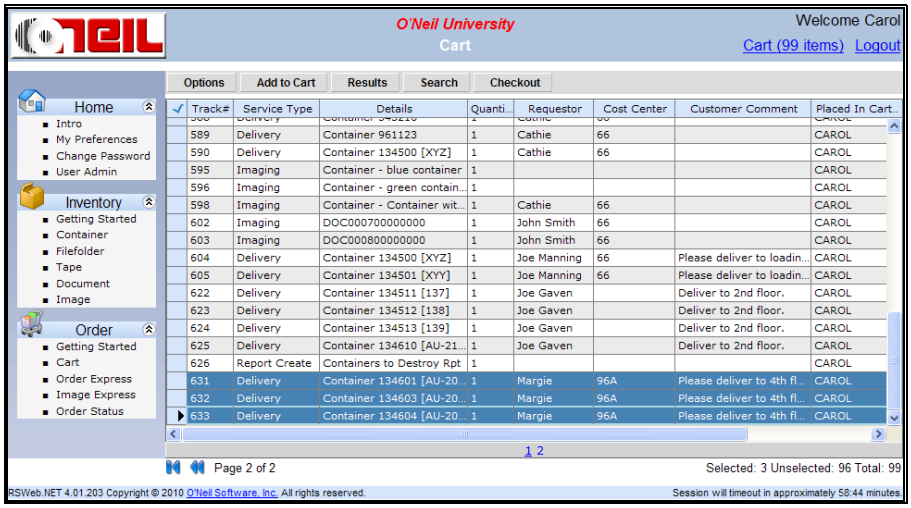


Click **Print Page** to print a copy of the Order Summary for your records. Click **Back to Cart** to close the summary and return to the cart.

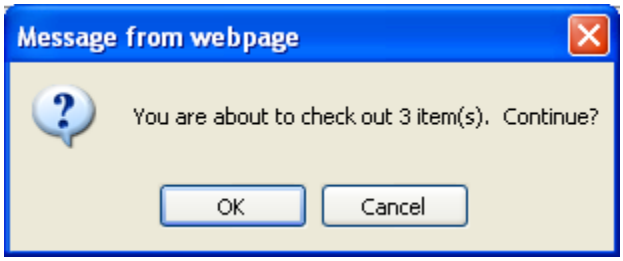
The items have been removed from the cart. The order has been sent to the record center. They will post the items to a workorder and fulfill your request.

Create a Workorder

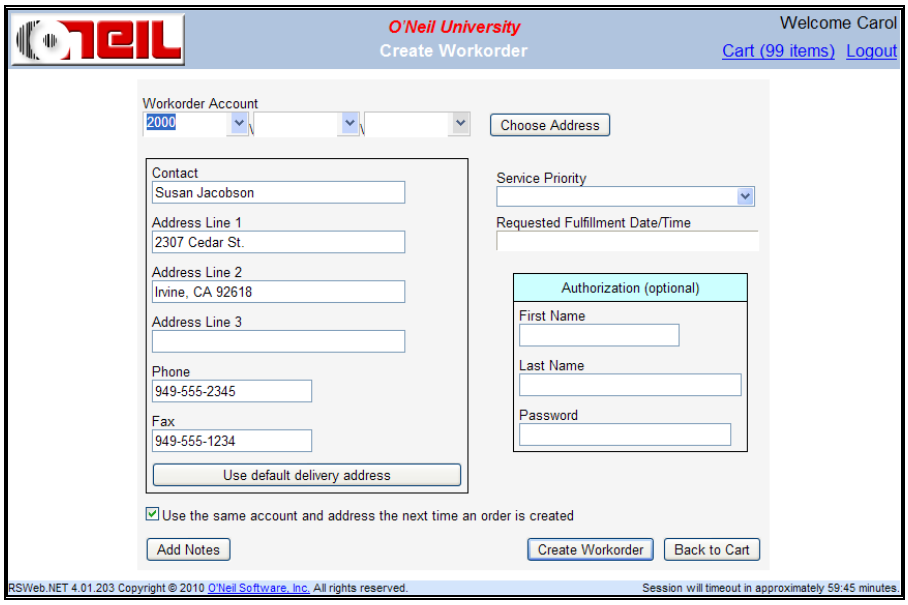
Select the items in the cart that you want included on the workorder.



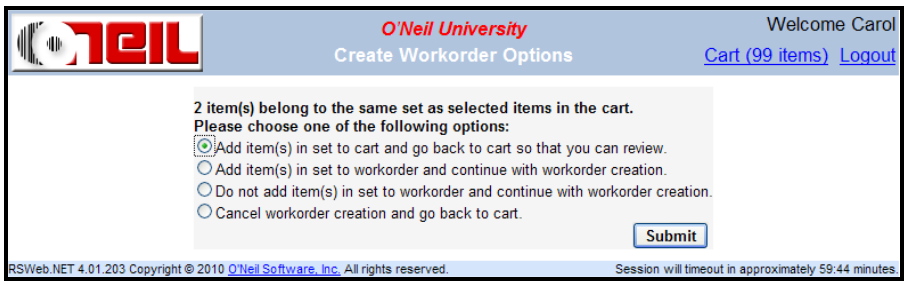
From the **Checkout** menu, select **Workorder**. The following message appears.



Click **OK** to continue.



If any of the items you are adding to the cart belong to a set of items and your record center has turned on the feature that checks for sets, the following message appears.



Select one of the available options.

Add item(s) in set to cart and go back to cart so that you can review: The additional items in the set are added to the cart and you are returned to the cart so you can view the items to determine whether or not you want to add them. The workorder is not created.

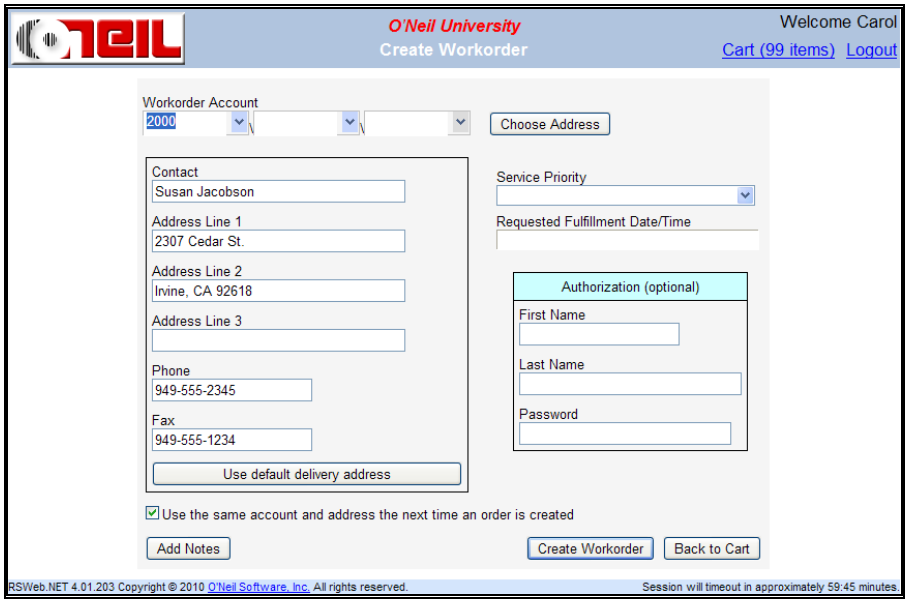
Add item(s) in set to workorder and continue with workorder creation: All additional items in the set are added to the workorder.

Do not add items(s) in set to workorder and continue with workorder creation: The additional items in the set are not added to the workorder.

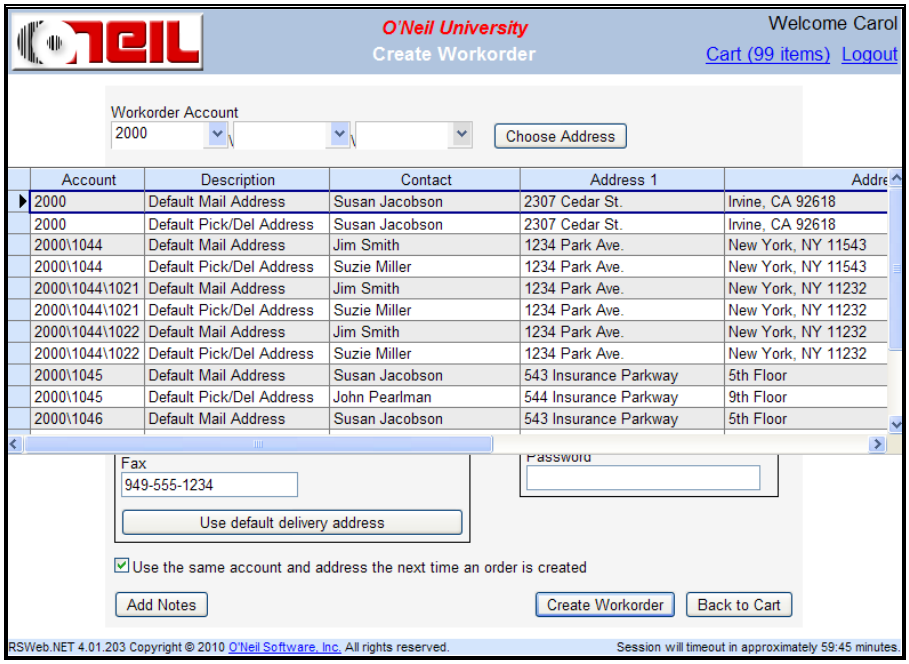
Cancel workorder creation and go back to cart: Cancel the workorder and return to the cart. No action is taken.

NOTE: If the number of additional items in the set exceeds the maximum allowed, the first two options will be unavailable. You can continue the workorder without adding the items, or contact your record center if you want to include the items.

Once you have made your selection, click **Submit**. If you chose to add the items to the cart, you are returned to the cart. Otherwise, the following screen appears.

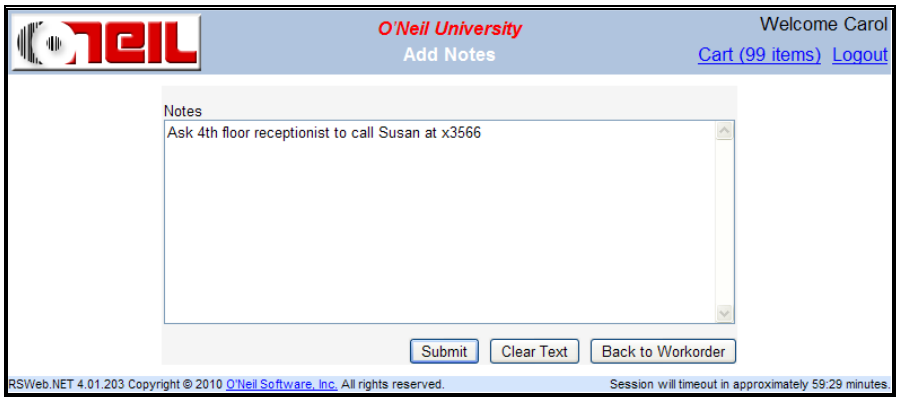


Enter your account number and your contact information. To use the default address for the account entered, click **Use default delivery address**. To choose a different delivery address, click the **Choose Address** button. An address grid is displayed with all available addresses for the account.



Click a row to select that address, and the address fields are automatically populated. If you want to use the same account and address the next time you create a workorder, select the check box below the address fields.

Click the **Add Notes** button to add any Workorder Notes for the workorder. If the workorder contains bulk items, the comments entered for the bulk items will be automatically transferred to the Add Notes page. The notes display the last and first name of the web user that placed the item in the cart, as well as their comments.



You can edit the bulk items comments along with entering notes that describe the workorder. You can enter up to 512 characters. Once you have finished entering your notes, click **Submit** to save the notes. The notes are added to the Create Workorder Summary.

Use the drop down arrow to select a Service Priority. Depending on your selection, the Requested Fulfillment Date/Time may be automatically populated. If not, enter the date and time you require this order.

If authorization is required for this account, enter the name and password in the Authorization section.

When you are finished, click **Create Workorder**. The workorder is created and submitted, and a Create Workorder Summary appears.

The summary displays the number of items that were ordered, as well as the number of items that were rejected for some reason.

Click **Print Page** to print a copy of the Create Workorder Summary for your records. Click **Back to Cart** to close the summary and return to the cart.

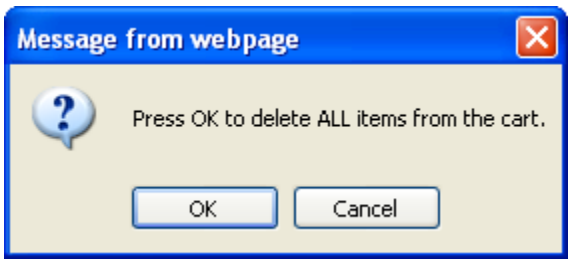
The items have been removed from the cart, and the workorders have been sent to the record center. They will process the workorders and fulfill your request.

Remove Items from Cart

Items can be removed from the cart without adding them to an order or workorder. There are three different options for deleting items.

Remove All Rows

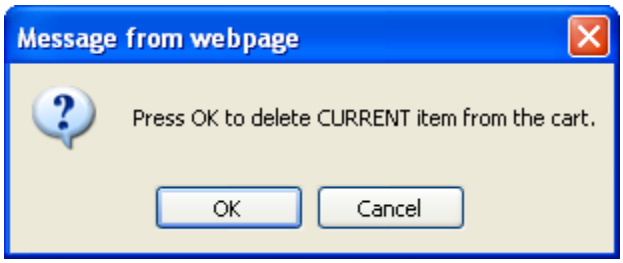
To remove all items in the cart, from the **Results** menu, select **Remove All Rows**. The following prompt appears.



Click **OK** to remove the items. All items in the cart are removed whether they are selected or not. Click **Cancel** if you change your mind and do not want to remove the items from the cart.

Remove Current Row

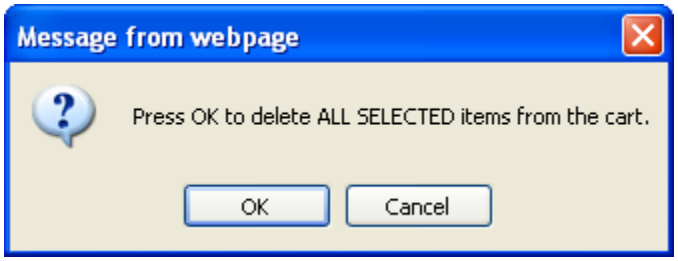
To remove only the item that is currently selected, from the **Results** menu, select **Remove Current Row**. The following prompt appears.



Click **OK** to remove the single selected item. Click **Cancel** if you change your mind and do not want to remove the item from the cart.

Remove Selected Rows

To remove all selected items, from the **Results** menu, select **Remove Selected Rows**. The following prompt appears.

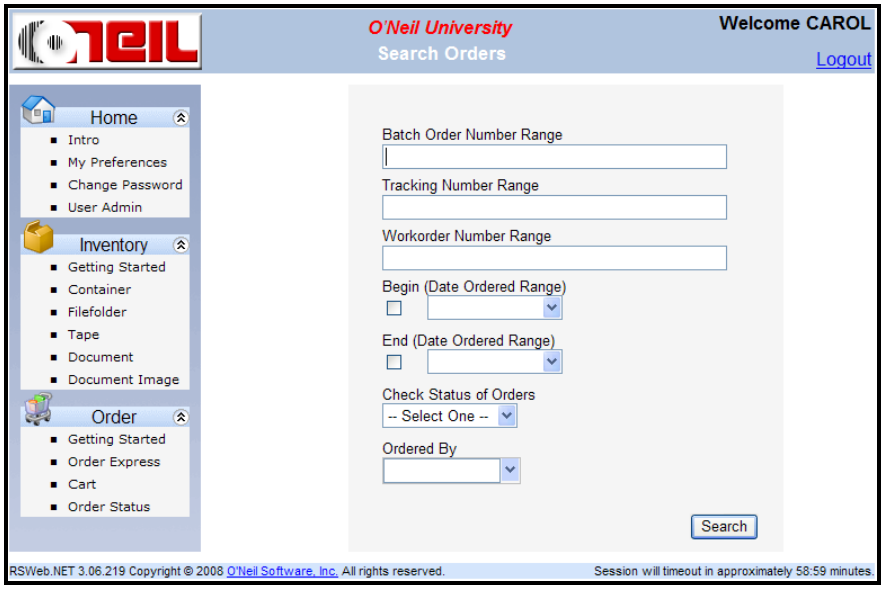


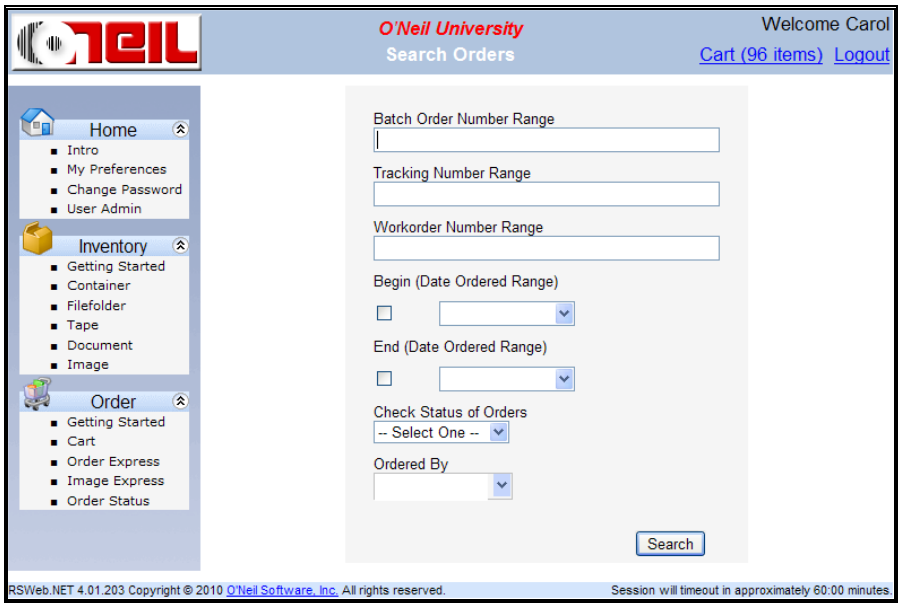
Click **OK** to remove all selected items. Any unselected items remain in the cart. Click **Cancel** if you change your mind and do not want to remove the items from the cart.

Order Status

Once you have placed an order through RSWeb, you can track its status as it is fulfilled by the record center. From the **Services** menu, click **Order Status**. The Search Orders screen displays.

NOTE: This screen only appears the first time you select **Order Status**. Once you have searched for items, the Order Status grid appears instead when you select **Order Status**. You can always return to the Search Orders screen from the Order Status grid by selecting the menu option **Search** and then **Search Orders**.

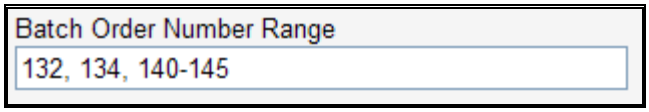




You can find the orders that you want to track using different criteria. You can tell the system what batch numbers, tracking numbers, or workorders you are looking for, or you can pull up any orders that were placed during a specified period. Alternately, you can search by the orders' status to find all orders that have reached a specific status. You can also use more than one of the search variables to find orders that match more than one criterion. For example, find all orders placed during the last week that have been fulfilled.

Searching by Batch Number Range

When you submit an order through RSWeb, your order is assigned to a batch, which is identified by a Batch Number. Any number of orders can belong to a given batch. To search for orders by Batch Number, you can enter a single batch number, more than one batch number, a range of batch numbers, or a combination. Multiple numbers can be separated by a comma or dash.



NOTE: If you enter a batch number that does not belong to your account (as determined by your log in), it will not be included in the results.

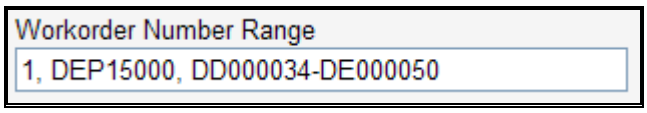
Searching by Tracking Number Range

Searching by tracking number works exactly the same as searching by batch number. The only difference is that each tracking number represents an individual order, whereas one batch number can represent several orders. To search for orders by tracking number, you can enter a single tracking number, more than one tracking number, a range of tracking numbers, or a combination. Multiple numbers can be separated by a comma or dash.

NOTE: If you enter a tracking number that does not belong to your account (as determined by your log in), it will not be included in the results.

Searching by Workorder Number Range

Searching by workorder number works similar to searching by batch or tracking number. The difference is that this field is alphanumeric. To search for orders by workorder number, you can enter a single workorder number, more than one workorder number, a range of workorder numbers, or a combination. Multiple numbers can be separated by a comma or dash.



NOTE: If you enter a workorder number that does not belong to your account (as determined by your log in), it will not be included in the results.

Searching by Date Range

To check the status of orders placed during a specific time period, use the Date Range fields. Select the check box to the left of the Date Range field. This tells the system that you want to search on those fields. Type the Begin and End dates for which you would like to search. You can also select just a Begin date or just an End date. It is not necessary to enter both.

Searching by Status

When you choose to check orders by their status, click the down arrow next to the Check Status of Orders field to select the status of your choice. The possible statuses for an order are as follows:

Submitted

Your order has been received by the record center, but has not yet been reviewed.

Scheduled

Your order has been reviewed by the record center and is scheduled for fulfillment.

Workorder

Your order has been reviewed by the record center and has been placed on a workorder for fulfillment, or you placed the order on a workorder and sent it to the record center for fulfillment.

Fulfilled

Your order has been fulfilled.

On Hold

Your order has been placed on hold because for some reason it could not be fulfilled. The record center has or will be contacting you for clarification.

Cancelled

Your order has been cancelled. Contact the record center if you have not been informed of the reason for the cancellation.

NOTE: An additional status of "In-Cart" may appear when you are actually viewing the status of your orders. This indicates that the item was placed into the cart, but has not yet been added to an order or workorder. It is just a way of letting you know that you still have items in your cart.

Searching by Ordered By

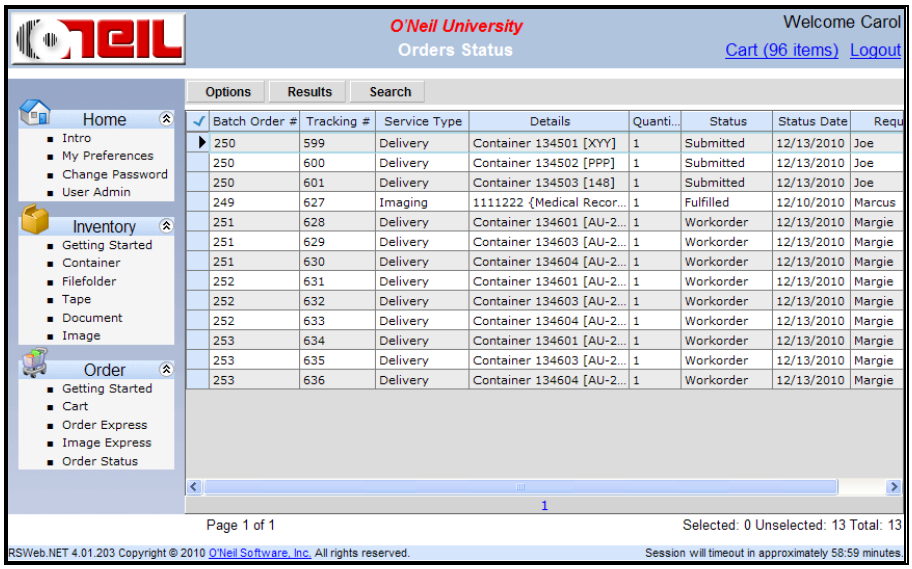
To check the status of orders placed by a specific user, use the Ordered By field. Click the drop down arrow to select the user you want. If you are a User Administrator, all users you have access to appear in the list. If you are not a User Administrator, only your name appears.

Combining Search Criteria

You can use more than one search criterion when you search for orders. For example, you may want to search for all orders that were submitted last week and have been fulfilled. Or you may want to find orders from a certain batch that have been placed on a workorder. Simply fill in the information in both sections of the search dialog.

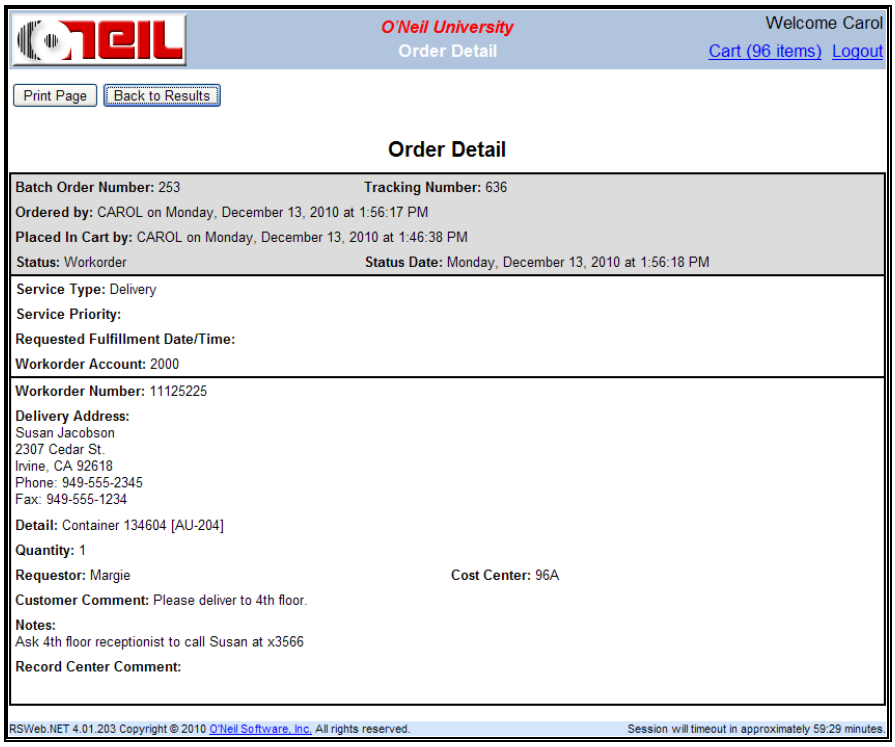
Search Results

When you click the **Search** button, a grid appears that lists each order that meets your search criteria.



NOTE: The Orders Status grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

To view more information about any order or to access a Web report, from the **Options** menu, select **View Detail**. The following Order Detail screen appears. The information included in the detail will be different depending on the type of order you are viewing.



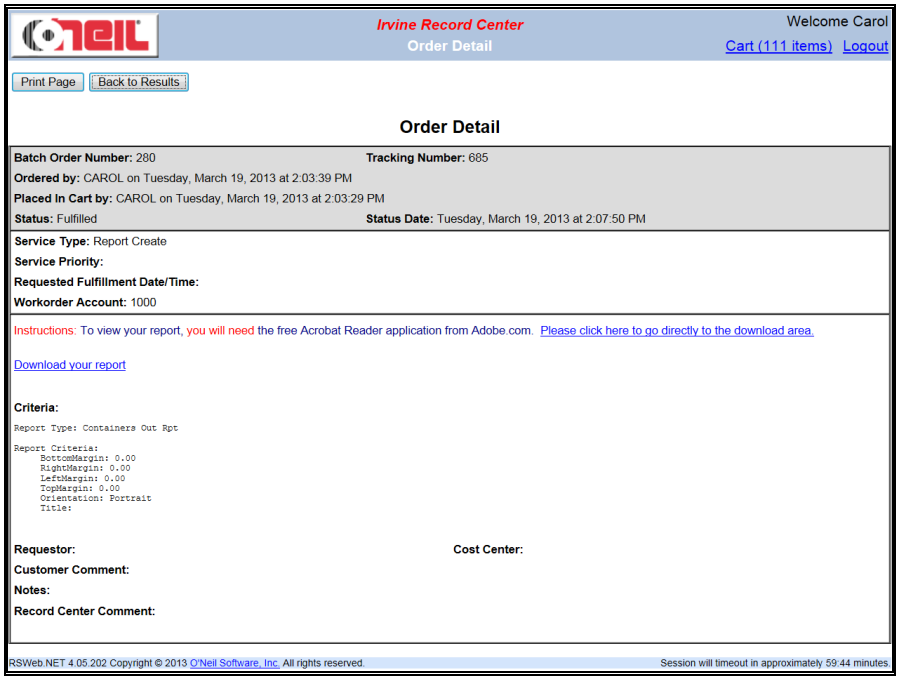
Click the **Back to Results** button to return to the **Orders Status** grid.

Retrieving a Web Report

To access a Web report once you have located and selected the order, from the **Options** menu, select **View Detail**.

If the report has not yet been completed, the report criteria displays along with a message indicating the report is not yet complete.

If your report has been completed, the criteria displays along with a link to download the report.



You need to have Acrobat Reader installed on your computer in order to access your report. If you do not have it installed, it can be downloaded by clicking the link to the download area. The Suggested Applications screen appears with links to the download sites.

Email Notification

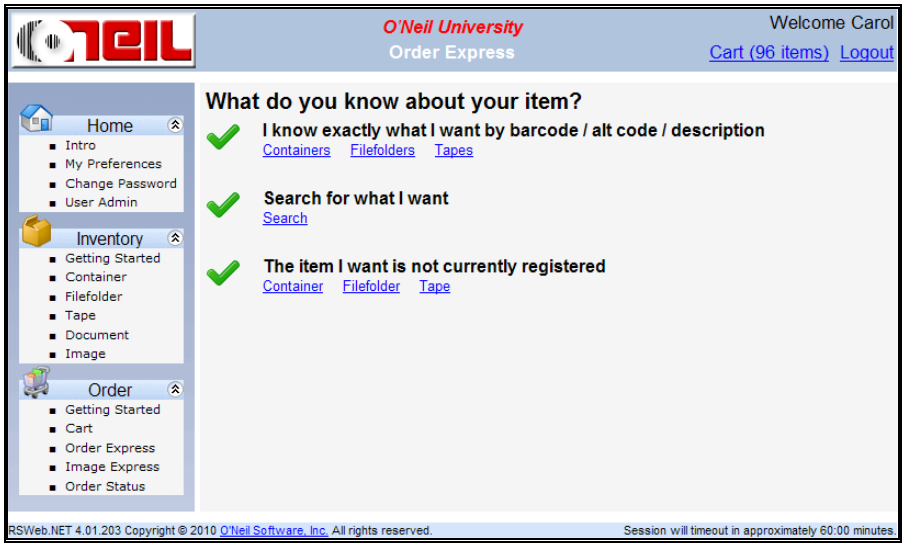
If your record center has set up email notification, when the report is ready to be downloaded, you will receive an email that includes a link to the report.

> RSWeb report order (tracking number 682) is now available for download.
> Click on (or copy to your browser) the following link to download:
>
> http://dtsd7e64011/RSWebNet/?WebOrderDetailID=682

To download the report, click the link in the email. The **Login** page of RSWeb.NET is displayed. Log in and you are taken directly to the **Order Detail** page where you can download your report.

Order Express

The **Order Express** menu option provides different ways for you to quickly order an item. It can be used to order an item if you do not know its barcode. There are three different options for entering items.



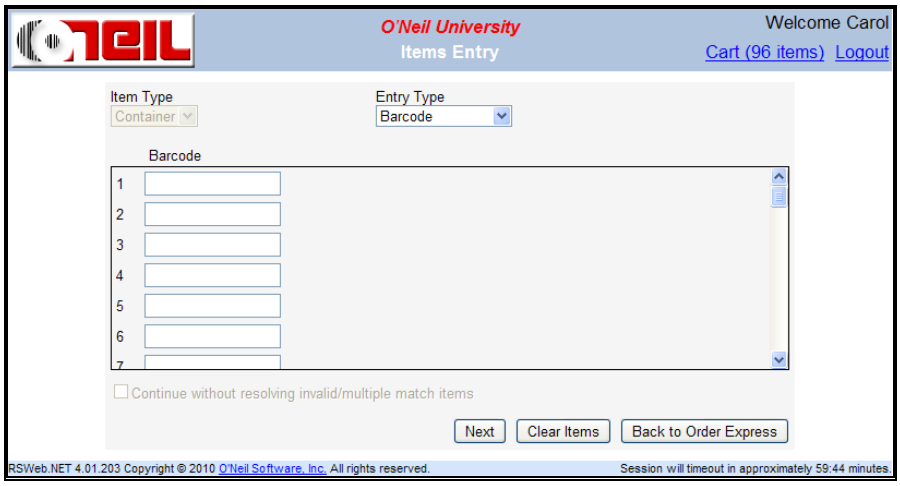
I know exactly what I want by barcode / alt code / description: Select this option if you know the barcode, alt code, or description of the item you want.

Search for what I want: With this option, you can search for your item using whatever information you do have.

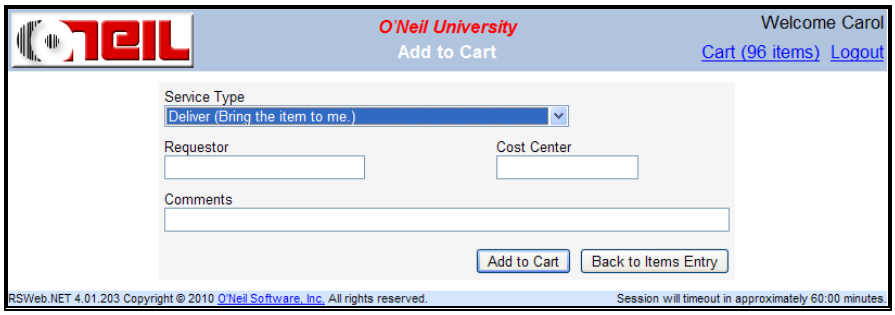
The item I want is not currently registered: Select this option if the item you want is not currently registered in the system.

I Know Exactly What I Want

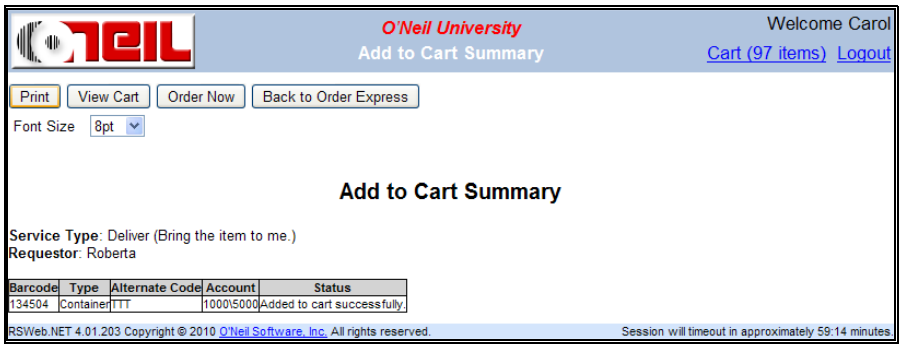
Selecting one of the links under this option takes you to the Items Entry screen.



Since you have already selected whether the item is a container, filefolder, or tape, the Item Type field is grayed out. Complete the other fields as usual. Click **Next** to continue.

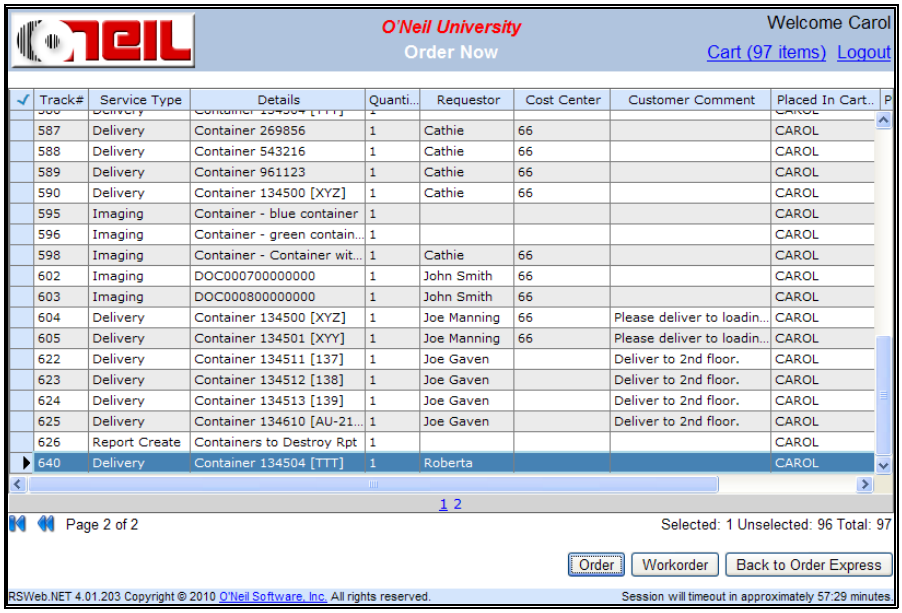


Complete the fields as usual. Click **Add to Cart** to add the items to the cart. The **Add to Cart Summary** displays.



Order Now

When you click the **Order Now** button, the items are added to the bottom of the Order Now grid. In the Order Now grid, the items that are added to the cart through Items Entry are highlighted.



Track#	Service Type	Details	Quanti...	Requestor	Cost Center	Customer Comment	Placed In Cart..
587	Delivery	Container 269856	1	Cathie	66		CAROL
588	Delivery	Container 543216	1	Cathie	66		CAROL
589	Delivery	Container 961123	1	Cathie	66		CAROL
590	Delivery	Container 134500 [XYZ]	1	Cathie	66		CAROL
595	Imaging	Container - blue container	1				CAROL
596	Imaging	Container - green contain...	1				CAROL
598	Imaging	Container - Container wit...	1	Cathie	66		CAROL
602	Imaging	DOC000700000000	1	John Smith	66		CAROL
603	Imaging	DOC000800000000	1	John Smith	66		CAROL
604	Delivery	Container 134500 [XYZ]	1	Joe Manning	66	Please deliver to loadin...	CAROL
605	Delivery	Container 134501 [XYY]	1	Joe Manning	66	Please deliver to loadin...	CAROL
622	Delivery	Container 134511 [137]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
623	Delivery	Container 134512 [138]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
624	Delivery	Container 134513 [139]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
625	Delivery	Container 134610 [AU-21...	1	Joe Gaven		Deliver to 2nd floor.	CAROL
626	Report Create	Containers to Destroy Rpt	1				CAROL
640	Delivery	Container 134504 [TTT]	1	Roberta			CAROL

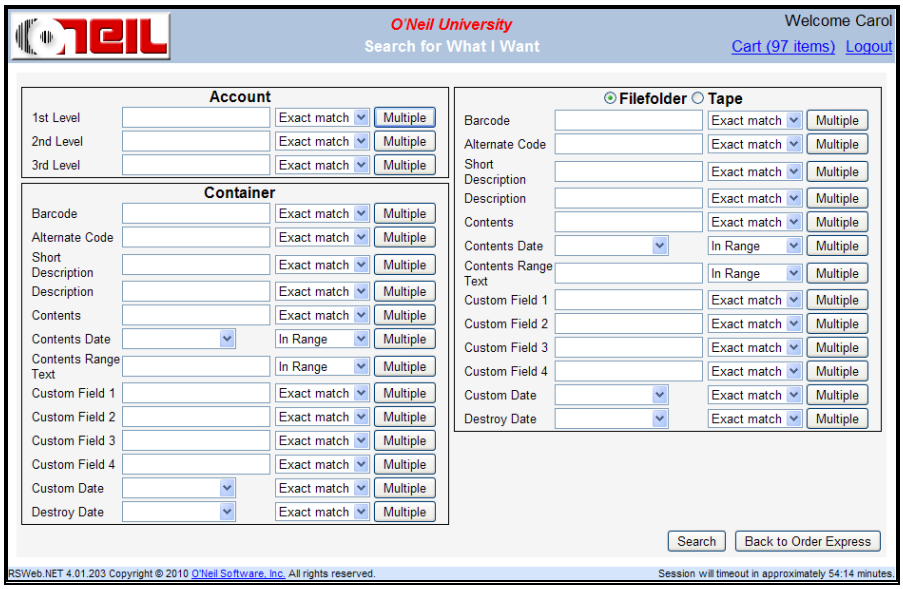
Make sure the items you want to order are highlighted and click **Order** to submit an order, or **Workorder** to submit a workorder. The Order/Workorder screen appears and you can continue as usual.

View Cart

If you prefer not to use Order Now, click View Cart. This button takes you to the cart where you can view your items and then place your order.

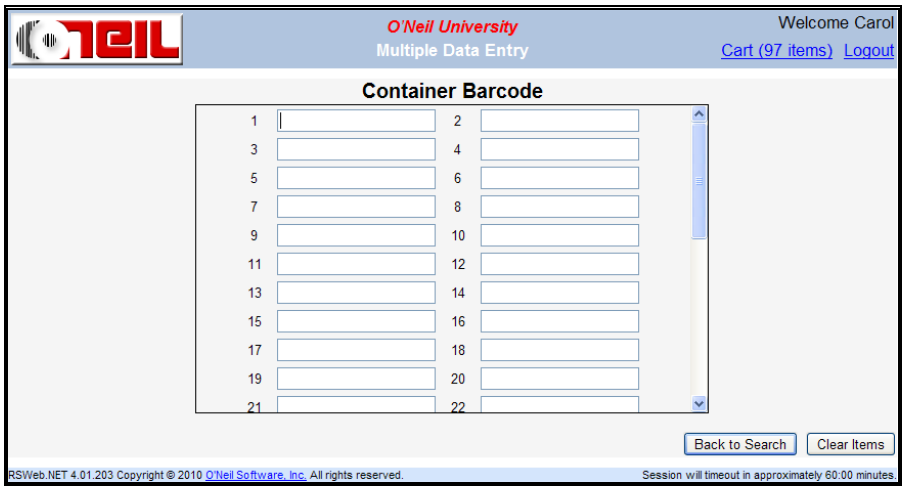
Search for What I Want

If you don't know the barcode, alternate code, or description, this option allows you to search on what information you do have.

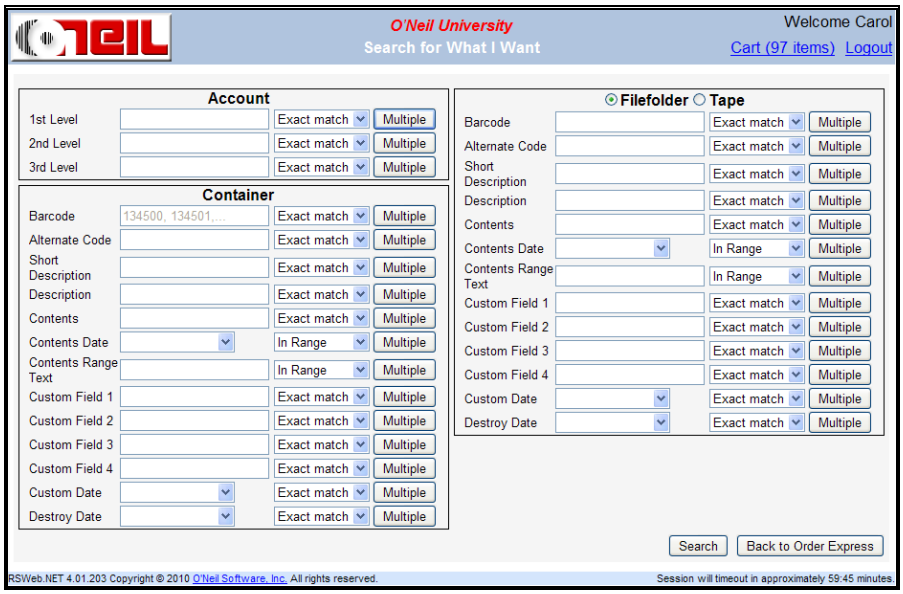


You can enter information for Account, Container, Filefolder, and Tape. However, you must use the radio buttons to select either Filefolder or Tape information; you cannot search for both at the same time.

Enter the information you have in the appropriate field. For each field you can select whether the text entered needs to match exactly, or if you want anything that begins with or contains the text entered. To enter more than one item in a field, click the **Multiple** button. The Multiple Data Entry screen appears.



Enter the items you want (there is a limit of 50). Tab to move between fields. When you have finished, click **Back to Search** to return to the previous screen.



The items have been added to the field followed by an ellipsis (...) to indicate the field contains multiple items. The field is grayed out. If you want to add or edit entries, you need to click the **Multiple** button again.

When querying by account level 1, 2, and 3, the logical operator AND is used. If you are querying by multiples, the operator OR is used to join the multiples within the same level, and the operator AND is used across levels. For example, querying by level 1 account 1000 and multiple level 2 accounts 200, 300, 400 would create the following query:

Item^Level1AccountCode = "1000" AND (Item^Level2AccountCode = "200" OR Item^Level2AccountCode = "300" OR Item^Level2AccountCode = "400).

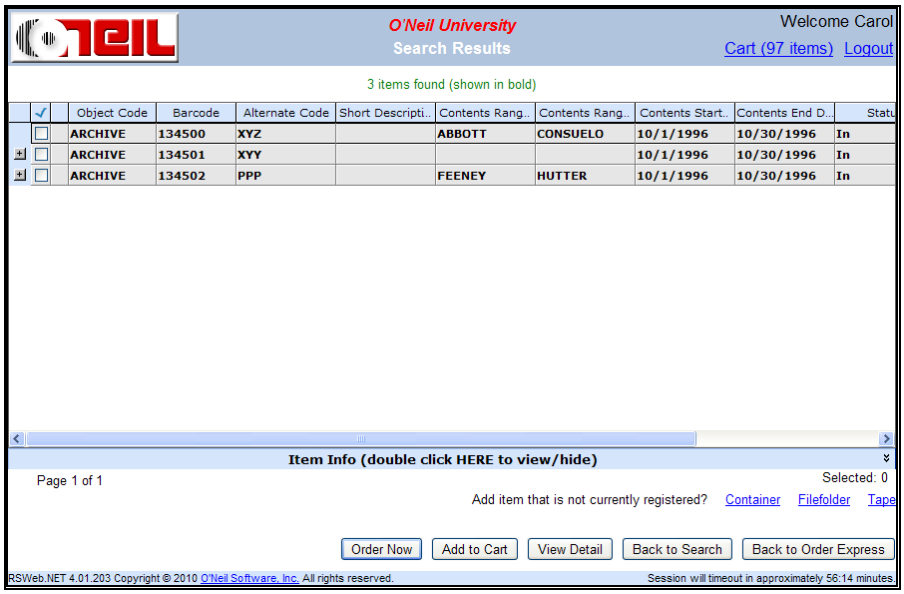
All search criteria except account uses the logical operator OR for searching. For example, if a container barcode 001001 and a filefolder alternate code ALT113 are entered in the search criteria, the search will look for container with barcode 001001 or filefolder with alternate code ALT113. The following query is created:

Container^Barcode = "001001" OR Filefolder^AltCode = "ALT113"

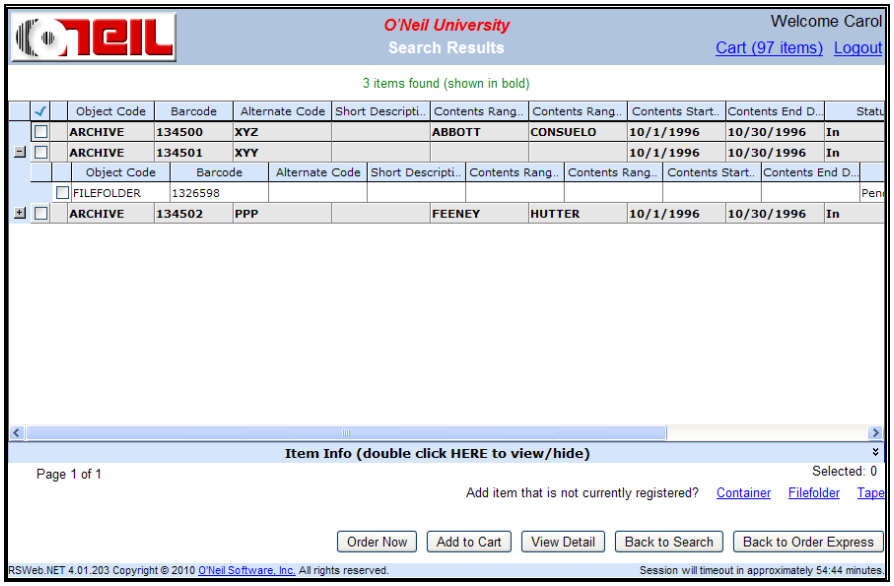
When account and other search criteria are used together, the search will match the other search criteria that belongs to the specified accounts. For example, if a container barcode 001001, a filefolder alternate code ALT113, and level 1 account 1000 are entered. The search will look for the container with barcode 001001 or the filefolder with the alternate code ALT113 that are under the level 1 account 1000. The following query is created:

Item^Level1AccountCode = "1000" AND (Container^Barcode = "001001" OR Filefolder^AltCode = "ALT113")

When you have completed the fields you want, click **Search** to begin the search.



When you search for containers and filefolders at the same time, if the filefolder happens to be inside a container that also matches your search criteria, the filefolder will be displayed in the first level of the grid, and will also be displayed when you expand the container it belongs to.



The Search Results grid returns a maximum of 500 items that match your criteria. If the number of results exceeds 500, the message “Not all results are displayed as the number of results exceeds the specified maximum” is displayed. The number of items found displays at the top of the screen. Each page contains 50 rows of data. If there is more than one page of results, navigation arrows appear at the bottom left of the screen. Click the arrows to move between screens.

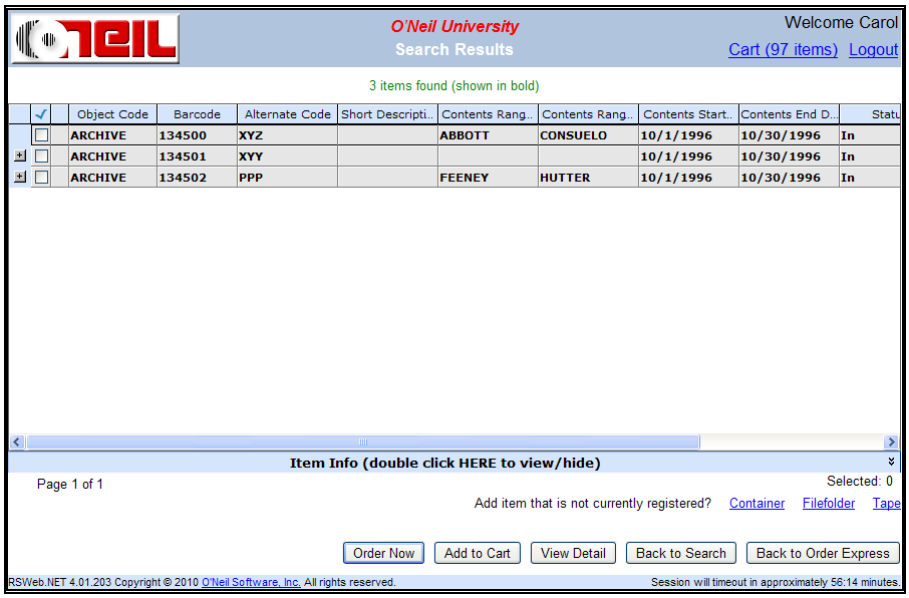
NOTE: Unlike the other screens in RSWeb, the Order Express Search Result screen displays only the current page number without the total number of pages.

The following keyboard shortcuts are available for navigating through the Search Results screen:

Key	Action
Home	Moves to the first row of the grid displayed
End	Moves to the last row of the grid displayed
Up Arrow	Moves you up one row at a time on the same level
Down Arrow	Moves you down one row at a time on the same level
Shift + Tab	Moves you up one row at a time through different levels if they are expanded
Tab	Moves you down one row at a time through different levels if they are expanded
+	Expands a row
-	Collapses a row
Space Bar	Toggles between selecting and unselecting a row

Add Unregistered Items

When search results are displayed but the item you are looking for is not listed, you have the option of adding the unregistered item from the Order Express Search Results grid.



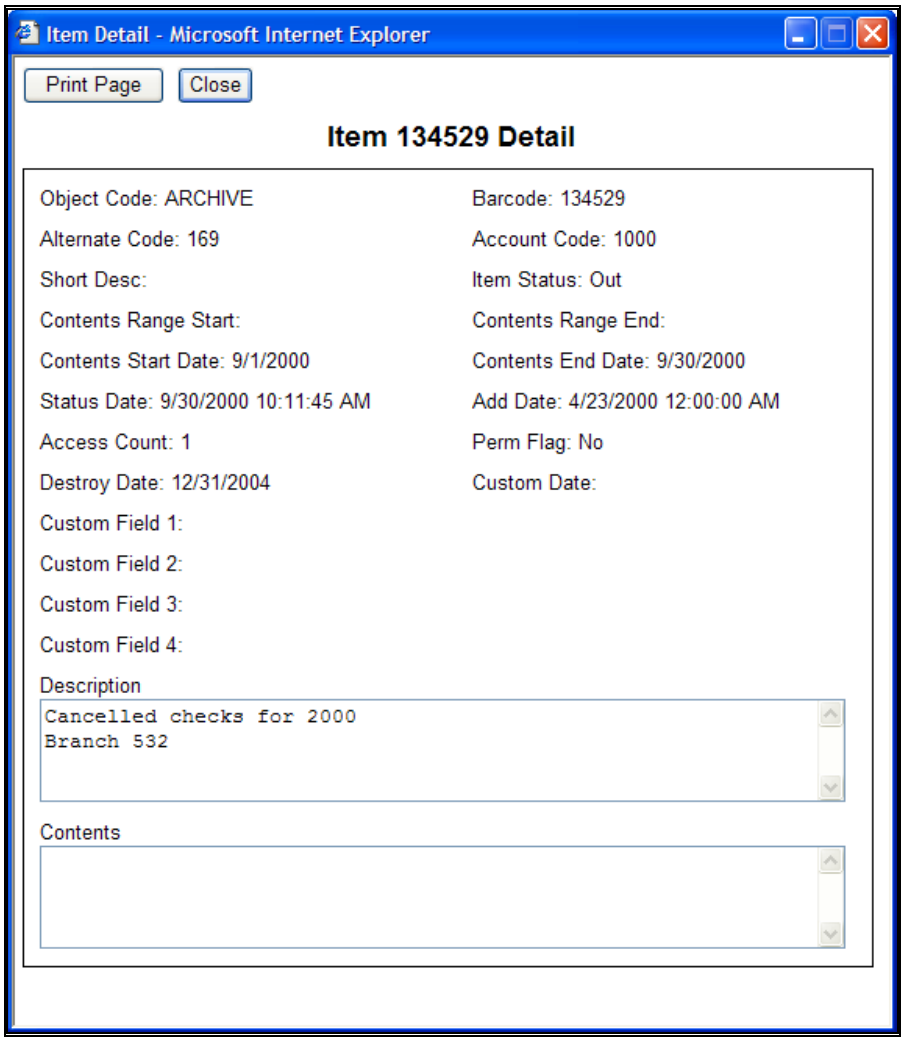
In the lower right corner, the message "Add item that is not currently registered?" appears. Next to the message are links to Container, Filefolder, and Tape.

If no results were returned using Order Express Search, the following page displays with the same links available.

Click on a link and you are taken to the Quick Add form (if your record center has created one). If a Quick Add form does not exist, you are taken to the Item Description page where you can add the item.

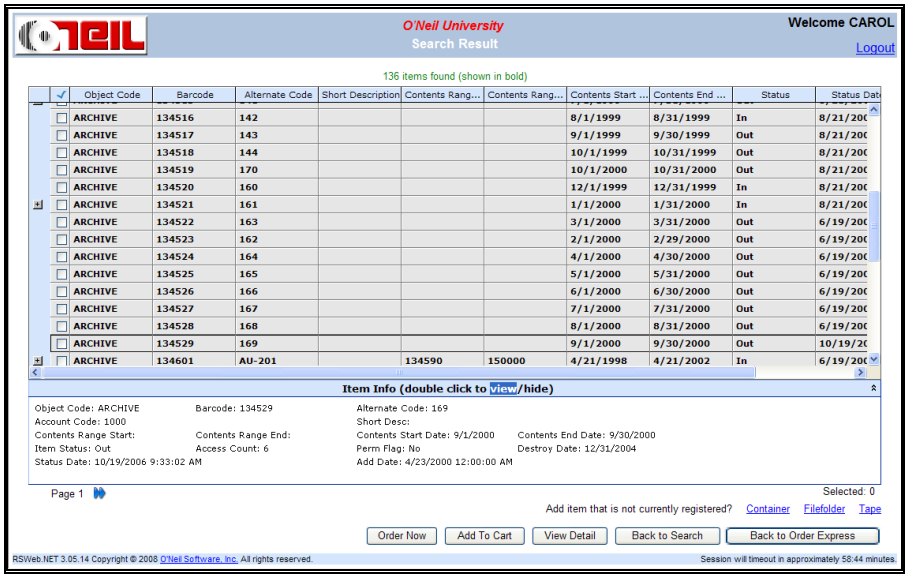
View Detail

Click the **View Detail** button to view details for any item.



You can also view item information by double clicking on the line "Item Info (double click here to view/hide)" near the bottom of the screen, or clicking the small down-arrow at the end of that line. This opens an item information panel at the bottom of the grid. As you select an item, its information is displayed in the panel.

NOTE: There may be a slight delay when you click on an item in the grid when the Item Information panel is open since the page is retrieving the information of the active row in real time.



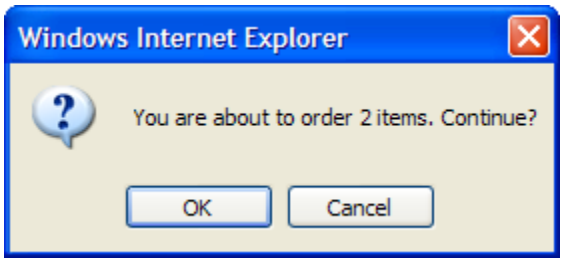
To close the panel, double click on the Item Info bar again, or click the small up-arrow.

To indicate the items you want to order, select the check box to the left of the row. To select all items in the grid, click the check mark at the top of the column. You can also select items by clicking and dragging in the check box column. The bottom right of the screen displays the number of items selected.

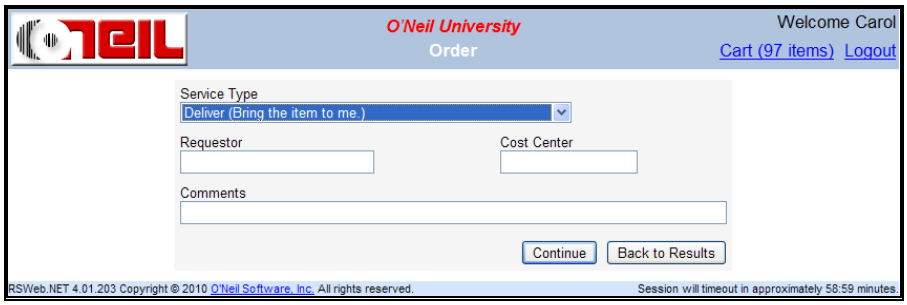
From here you have two options. You can order the items now, or you can add them to the cart.

Order Now

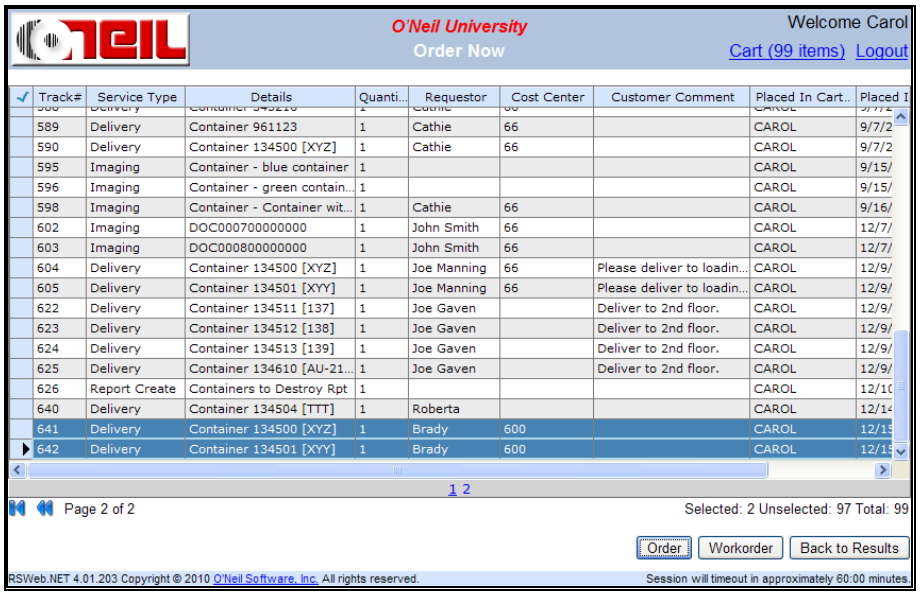
When you click the **Order Now** button, you receive the following prompt.



Click **OK** to continue. The Order Items screen appears.



Complete the fields and click **Continue**. The Order Now grid appears.

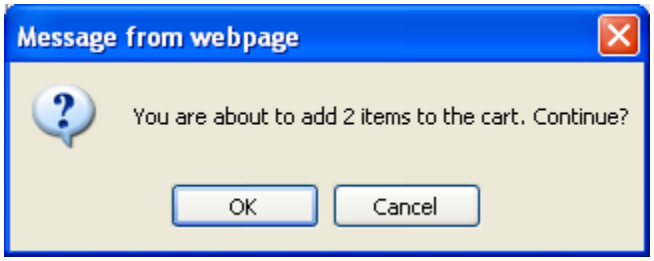


Track#	Service Type	Details	Quanti...	Requestor	Cost Center	Customer Comment	Placed In Cart..	Placed I
589	Delivery	Container 961123	1	Cathie	66		CAROL	9/7/2
590	Delivery	Container 134500 [XYZ]	1	Cathie	66		CAROL	9/7/2
595	Imaging	Container - blue container	1				CAROL	9/15/
596	Imaging	Container - green contain...	1				CAROL	9/15/
598	Imaging	Container - Container wit...	1	Cathie	66		CAROL	9/16/
602	Imaging	DOC000700000000	1	John Smith	66		CAROL	12/7/
603	Imaging	DOC000800000000	1	John Smith	66		CAROL	12/7/
604	Delivery	Container 134500 [XYZ]	1	Joe Manning	66	Please deliver to loadin...	CAROL	12/9/
605	Delivery	Container 134501 [XYY]	1	Joe Manning	66	Please deliver to loadin...	CAROL	12/9/
622	Delivery	Container 134511 [137]	1	Joe Gaven		Deliver to 2nd floor.	CAROL	12/9/
623	Delivery	Container 134512 [138]	1	Joe Gaven		Deliver to 2nd floor.	CAROL	12/9/
624	Delivery	Container 134513 [139]	1	Joe Gaven		Deliver to 2nd floor.	CAROL	12/9/
625	Delivery	Container 134610 [AU-21...	1	Joe Gaven		Deliver to 2nd floor.	CAROL	12/9/
626	Report Create	Containers to Destroy Rpt	1				CAROL	12/10
640	Delivery	Container 134504 [TTT]	1	Roberta			CAROL	12/14
641	Delivery	Container 134500 [XYZ]	1	Brady	600		CAROL	12/15
642	Delivery	Container 134501 [XYY]	1	Brady	600		CAROL	12/15

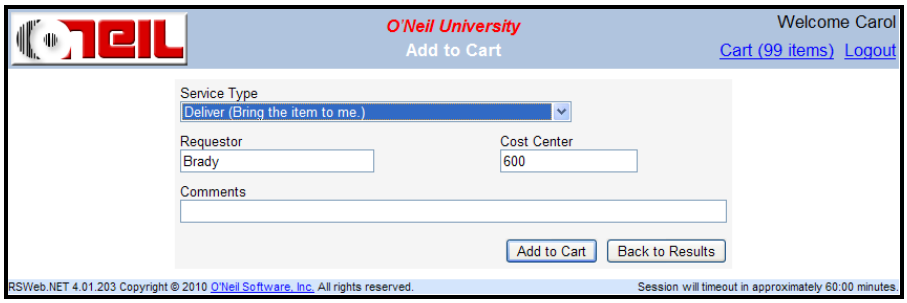
The items you just requested display at the bottom of the grid and are highlighted. Click **Order** or **Workorder** to submit your order as usual.

Add to Cart

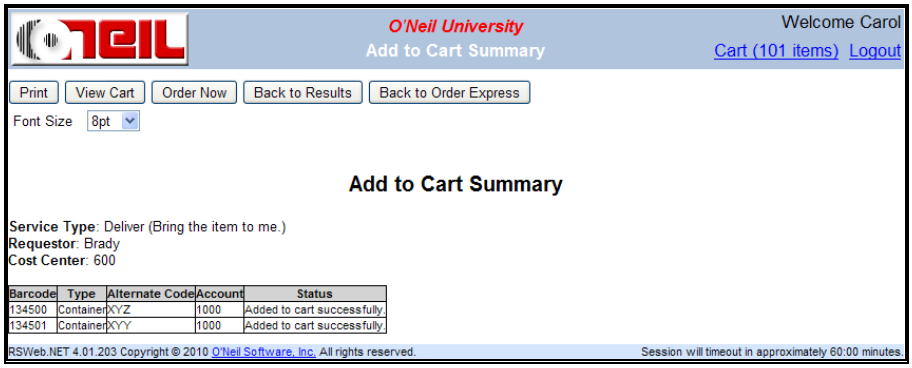
When you click the **Add to Cart** button, the following prompt appears.



Click **OK** to continue. The Add to Cart screen appears.



Enter the necessary information and click **Add to Cart**. The Add to Cart Summary appears, indicating that all items were successfully added.



You can choose to place your order now or view the cart.

No Item Found

If the item you are searching for does not exist in the system, the following screen displays.

To add an item that is not currently registered in the system, click one of the links. You are taken to either a quick add form or an item description screen, which are both described in the following section.

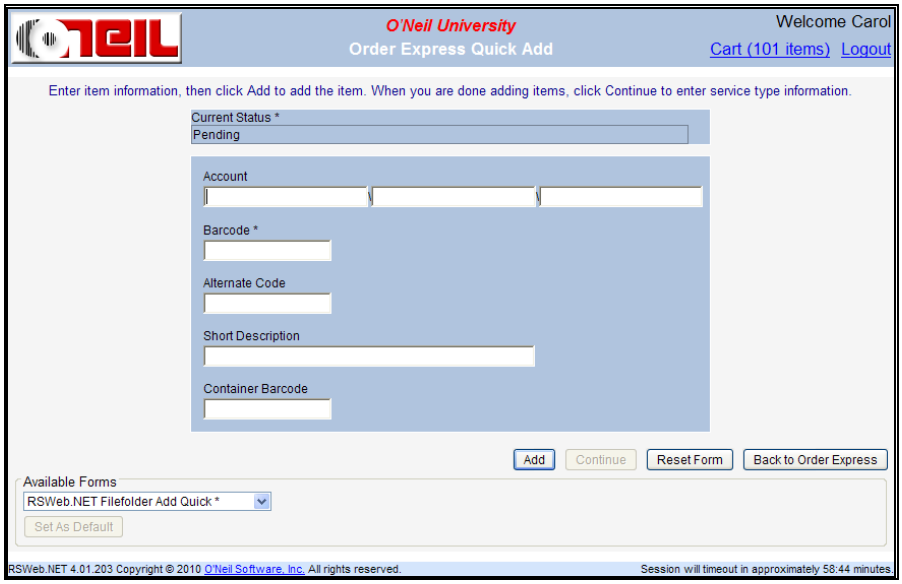
The Item I Want is Not Currently Registered

There are two ways you can order an item that is not currently registered in the system. One way is to use a quick add form, and the other is to describe the item.

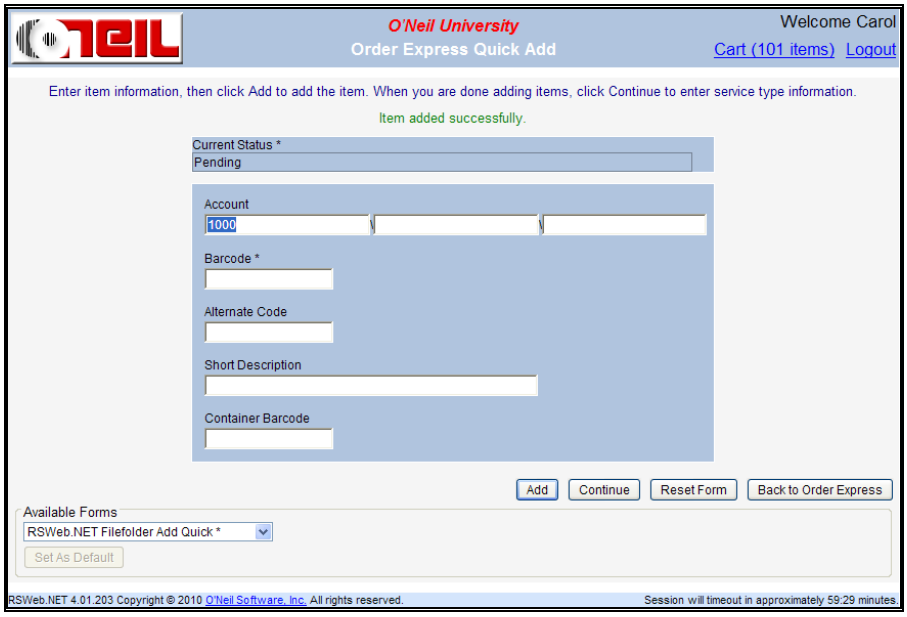
Quick Add Form

Quick add forms are used to add a temporary filefolder. They cannot be used for containers or tapes. There is a field in the Default Form Configuration screen under the **My Preferences** menu to select a default Quick Add form for Filefolders.

If a Quick Add form is assigned, when you click on the Filefolder link, an Order Express Quick Add screen similar to the following appears (you will see the form that your record center has set up for you).

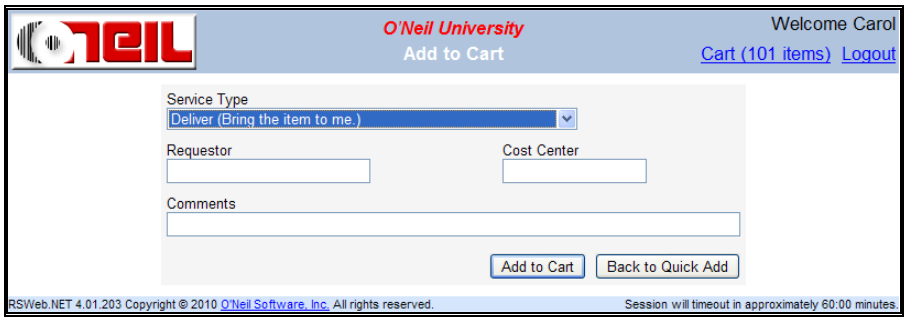


Enter your data in the fields and click **Add**. A message indicates that the item was successfully added.

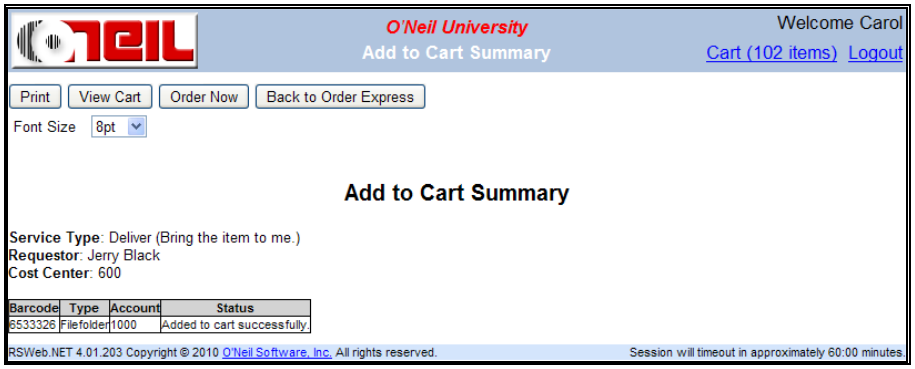


You can continue adding as many items as you want. When you have finished, click **Continue**. The **Add to Cart** dialog appears.

NOTE: The values entered in the Quick Add data entry fields are ignored when the **Continue** button is clicked. Items need to be added using the **Add** button first before clicking **Continue**.



Complete the fields and click **Add to Cart**.

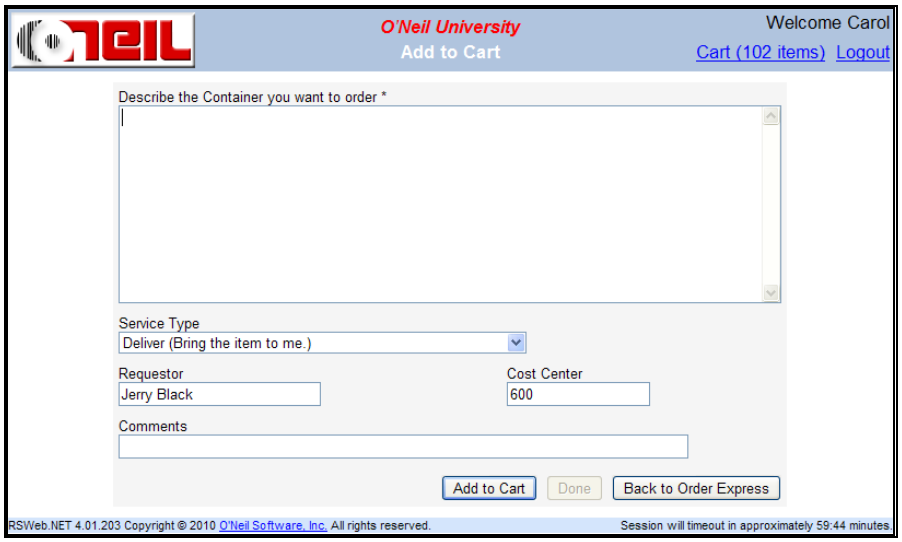


Click **View Cart** to go back to the cart, or click **Order Now** to continue placing your order.

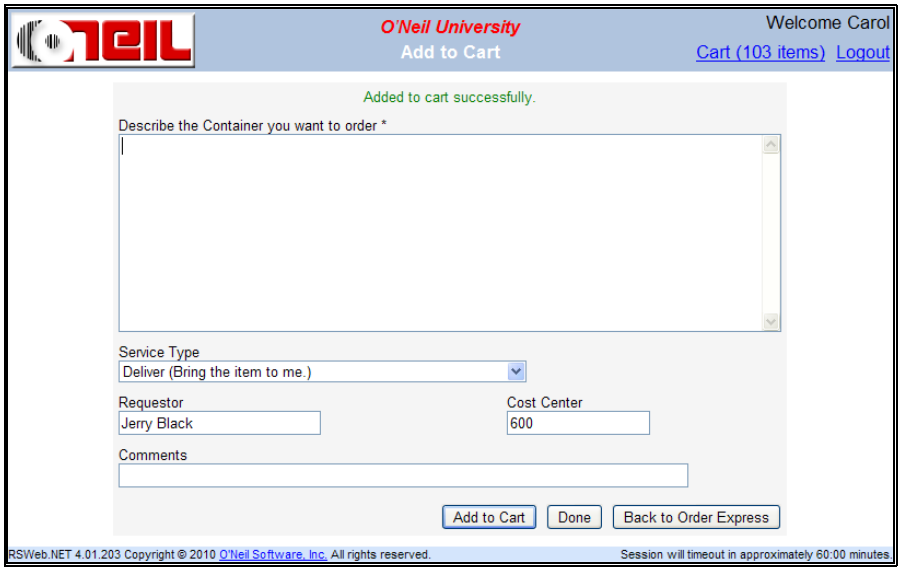
Describe the Item

This option allows you to describe the item by entering as much information as you know about it in a freeform text box. The following screen appears if you select Containers or Tapes. It also appears if no quick add form is assigned for Filefolders.

NOTE: Items added using this method can only be added to a web order. They cannot be added to a workorder.



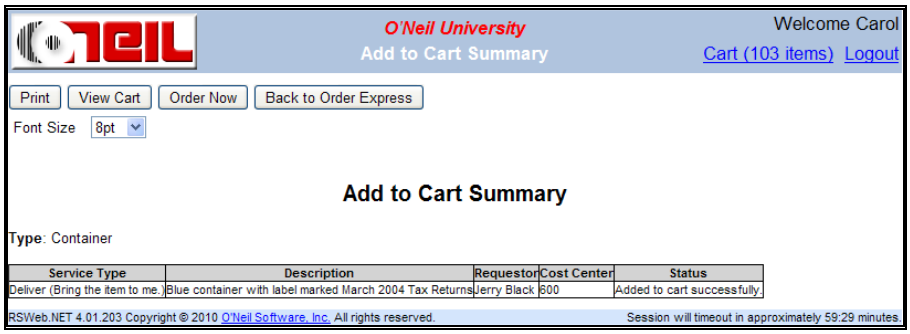
When you have entered your text, click **Add to Cart**. A message indicates that the item was successfully added to the cart.



You can continue describing as many items as you want. When you have finished, click **Done**.

NOTE: The values entered in the data entry fields are ignored when the **Done** button is clicked. Items need to be added using the **Add to Cart** button first before clicking **Done**.

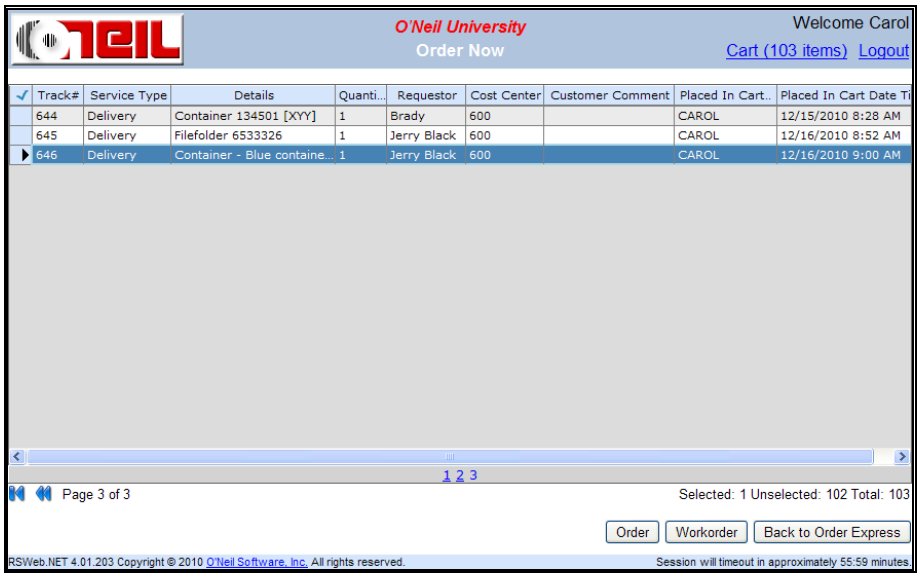
The items are added to the cart.



Click **View Cart** to go back to the cart, or click **Order Now** to continue placing your order.

Order Now

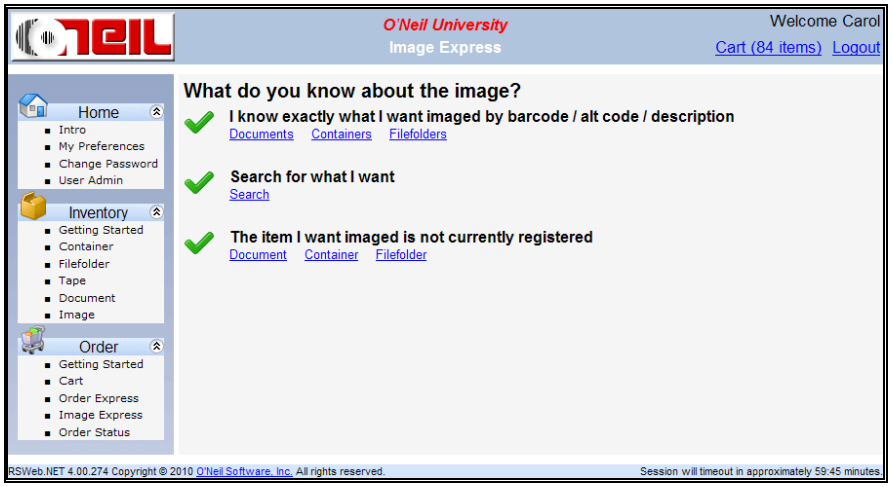
When you click **Order Now**, the items that were added through the **Add to Cart** button, plus the current described item (if any) are added to the bottom of the Order Express Review grid.



Make sure the items you want to order are highlighted and click **Order** to submit an order, or **Workorder** to submit a workorder. The Order/Workorder screen appears and you can continue as usual.

Image Express

The Image Express menu option provides different ways for you to quickly order an image of a container, filefolder, or document. It works basically the same as the Order Express feature.



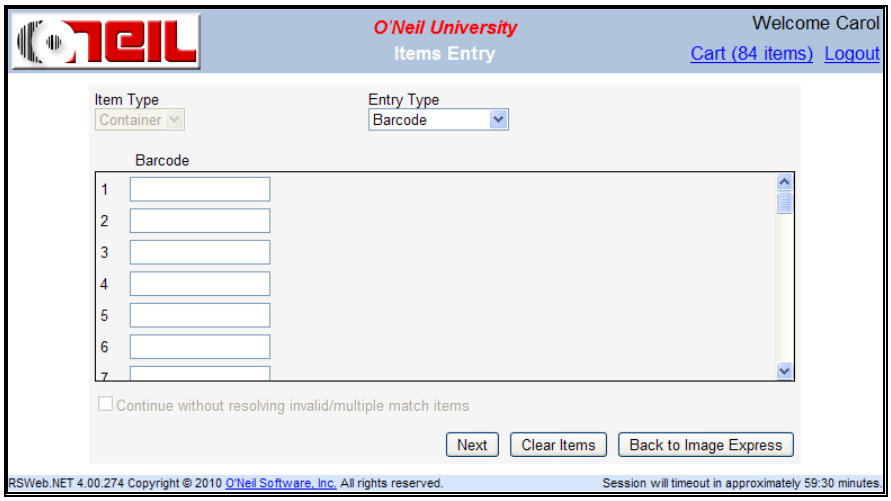
I know exactly what I want imaged by barcode / alt code / description: Select this option if you know the barcode, alt code, or description of the item you want to have imaged.

Search for what I want: With this option, you can search for your item using whatever information you do have.

The item I want is not currently registered: Select this option if the item you want imaged is not currently registered in the system.

I know exactly what I want imaged

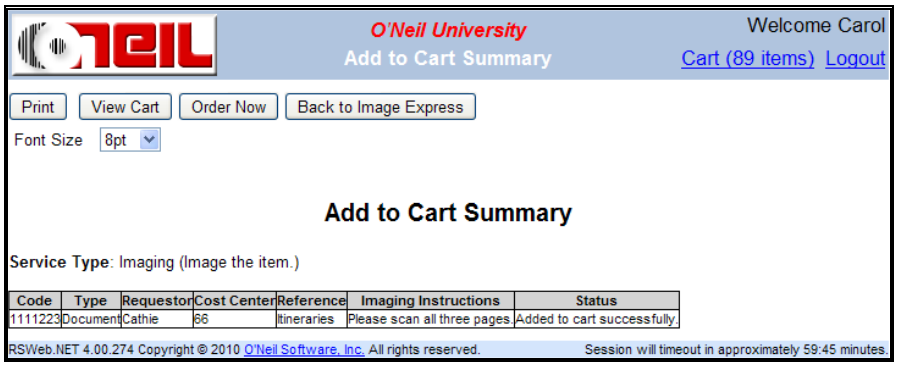
Selecting the **Containers** or **Filefolders** link takes you to the Items Entry screen.



Since you have already selected whether the item is a container or filefolder, that field is grayed out. You can enter Barcode, Alt Code, or Short Description information. When you have entered everything you want, click **Next**. The **Add to Cart** dialog appears (see *Add to Cart* section below).

Selecting the **Documents** link takes you to the **Add to Cart** screen.

Complete the fields as usual. Click **Add to Cart** to add the item to the cart. All fields except Requestor and Cost Center are cleared and you can add another item. When you have finished adding items to the cart, click **Done**. The **Add to Cart Summary** displays.



Search for what I want

If you don't know the barcode, alternate code, or description of the item you want imaged, this option allows you to search on what information you do have. Select the check box next to the type of item you want to search for. You can search for more than one type at a time.

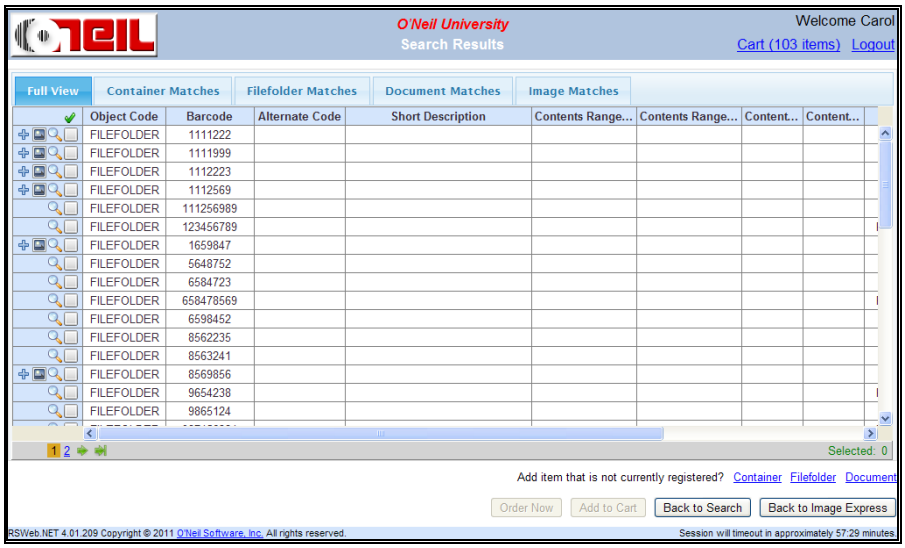
The section expands to display Search Criteria fields.

Use the drop down arrow in the first field to select what you want to search by. In the next field type the criteria you want to match. In the third field use the drop down arrow to indicate if you want an exact match, or anything that begins with or contains the text entered. To add additional criteria to the search, click the **+** icon. To remove criteria from the search, click the **-** icon.

Once you have entered everything you want, click **Search** to display the results.

Viewing Search Results

All results based on the search criteria entered display in the **Search Results** grid. An item that is not a match will also display if something contained in that item is a match.

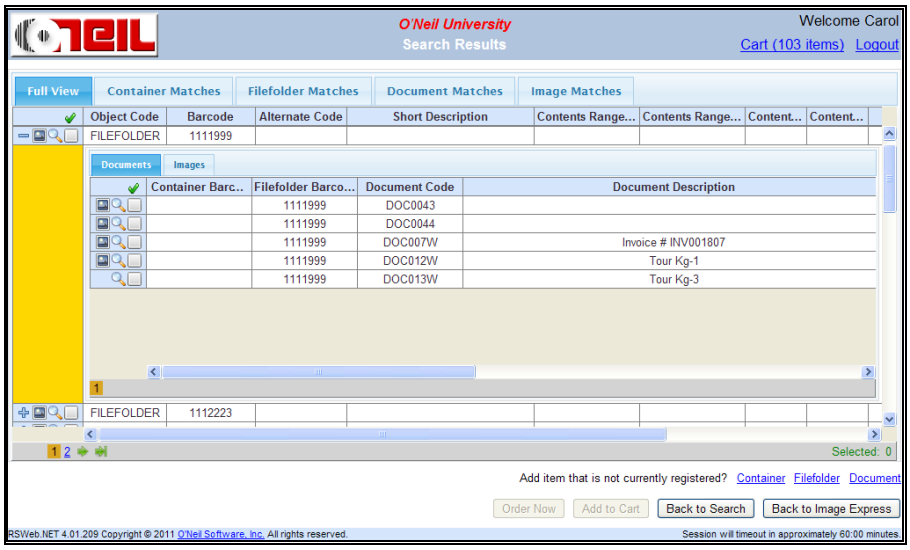


The + icon indicates that there are containees in the object.

Click on the icon to expand the view.

- Containers could contain filefolder, documents and/or images.
- Filefolders could contain documents and/or images.
- Documents could contain images.

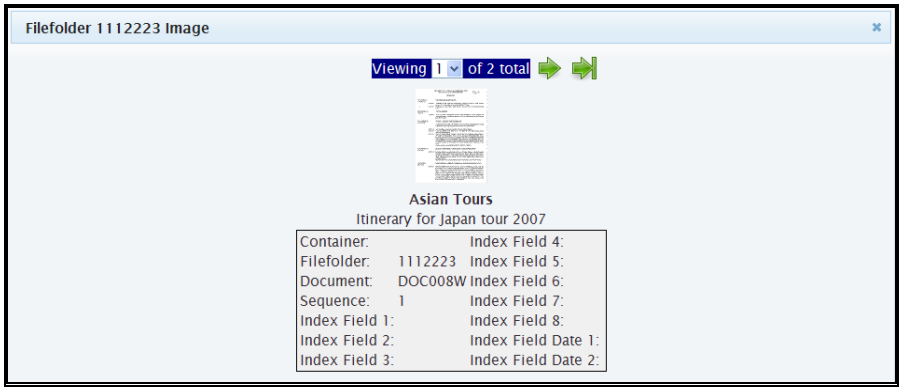
When an object is expanded, the grid includes additional tabs to filter what is contained in that object if applicable.



The **–** icon collapses the containee view.

The **View Images** icon allows you to view existing images for that object. It only appears if images exist.

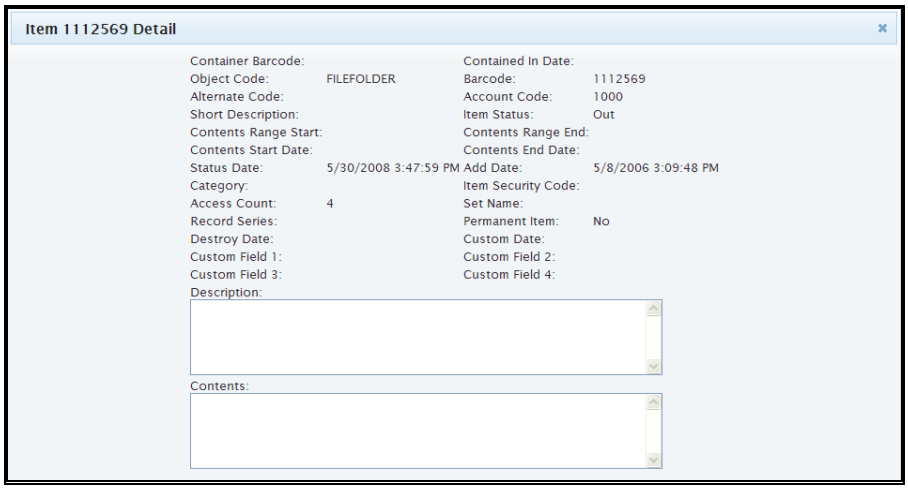
Click the icon to display the image viewer. You can then navigate through the images.



Click the thumbnail to view the full image. To close the image viewer, click the **X** in the top right corner.

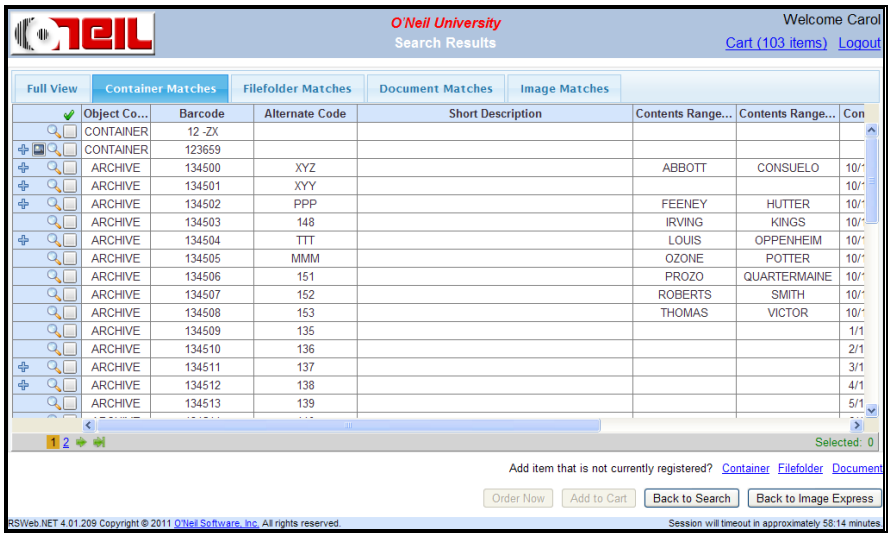
To view details of the object, click the **View Detail** icon.

The item detail display.



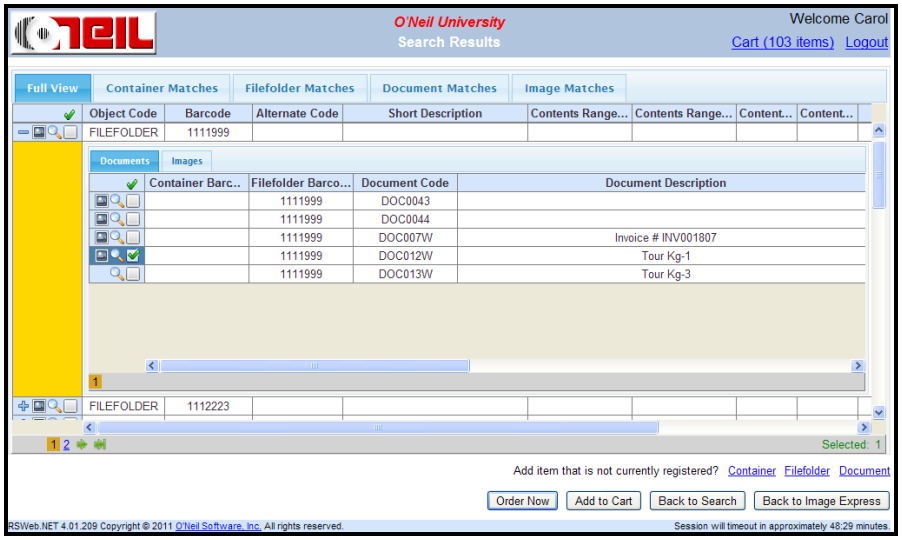
To close the **Detail** dialog, click the **X** in the top right corner.

Tabs along the top of the grid allow you to filter the results. The default is Full View. To filter the results, click one of the other tabs.



Selecting Items

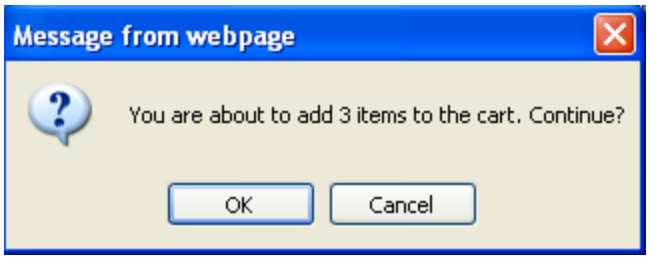
To select an item to add to the cart (or Order Now), select the check box next to the item.



The following applies when selecting items.

- Click the green check mark at the top of the column to select all items in the grid.
- When you select a check box for a container that contains filefolders. All filefolders are included. If you only want to order one of the filefolders in a container, expand the container view first and then select the desired filefolder.

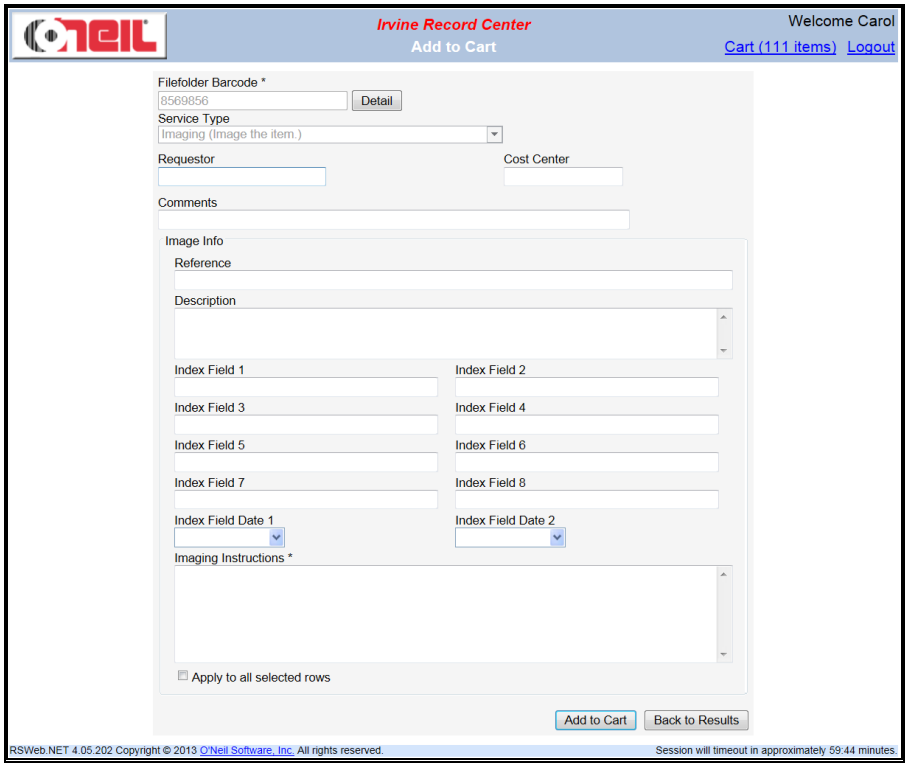
Once items have been selected, click **Add to Cart**.



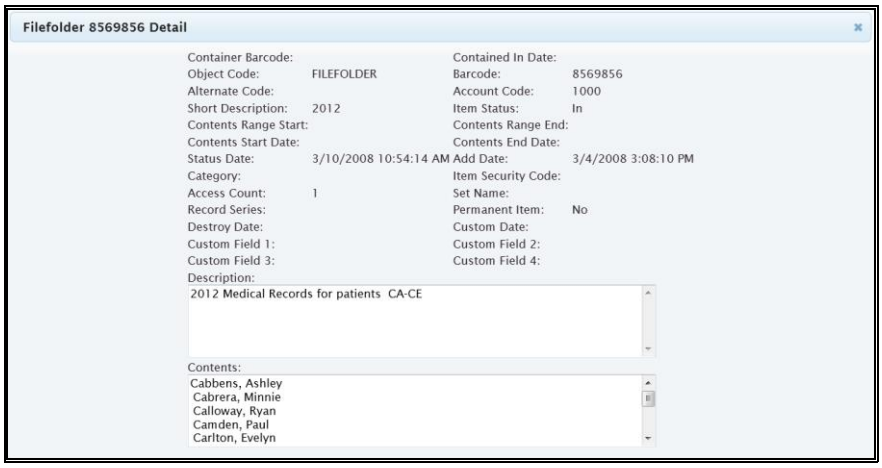
You receive the standard confirmation that you are about to add items to the cart. Click **OK**. The **Add to Cart** dialog appears (see *Add to Cart* section below).

Add to Cart

You can access the **Add to Cart** dialog from both of the areas described above.



The first item selected is displayed. To view details for the item, click **Detail**.

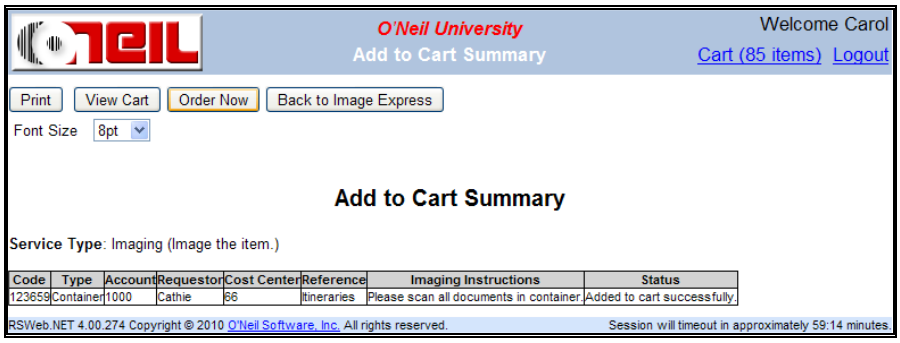


Click the **X** in the top right corner to close the **Detail** screen and return to the **Add to Cart** dialog.

The Service Type is set to Imaging and cannot be changed. Complete the fields as necessary.

If you are adding multiple items to the cart at once, and want to have the information entered apply to all the items, select the *Apply to all selected rows* check box. If you do not select the check box, when you click **Add to Cart**, the same screen appears for the next item.

When you have completed all fields, click **Add to Cart**. The **Add to Cart Summary** displays.

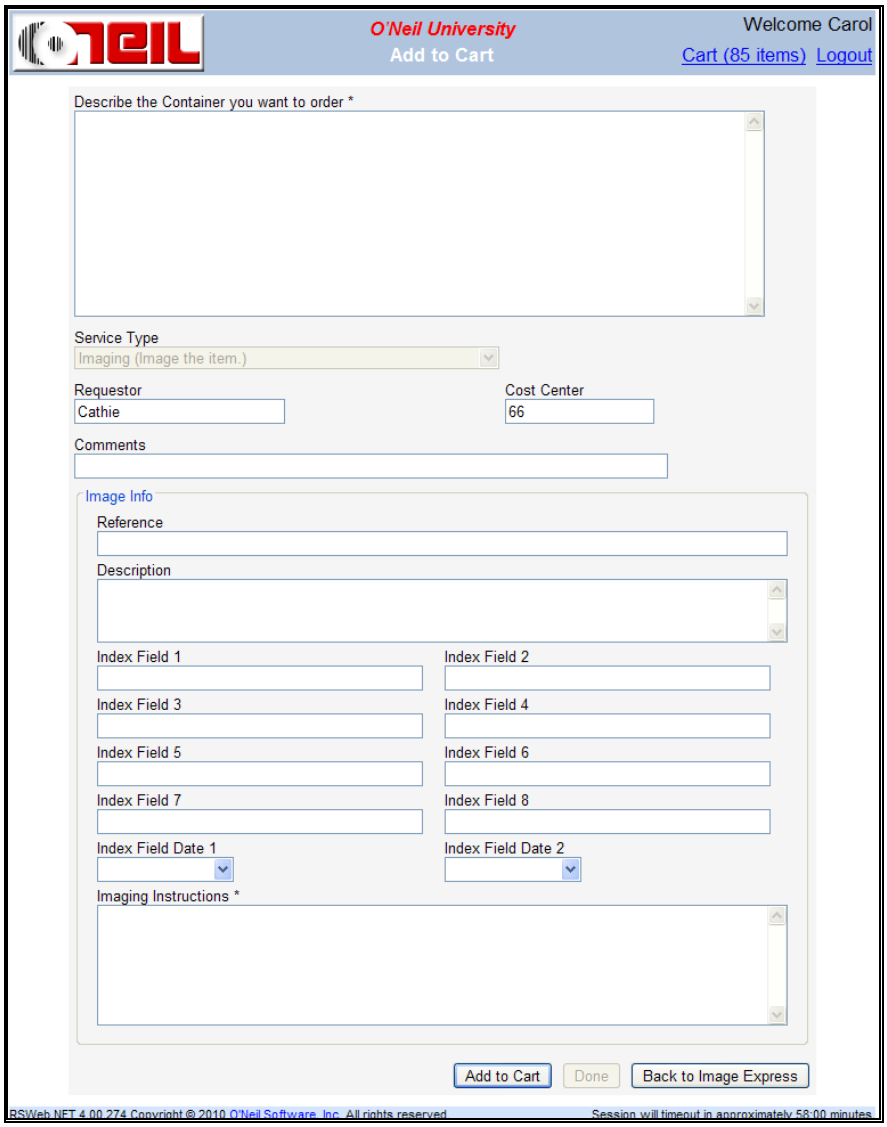


NOTE: Since there are so many entry fields for imaging requests, any fields that are blank for all requested items will not display in the summary.

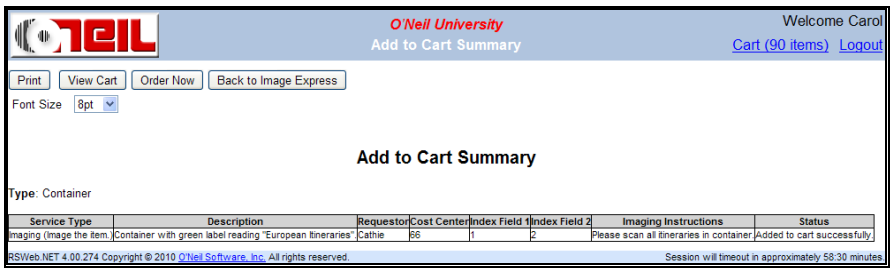
The item I want is not currently registered

This option allows you to describe the item you want imaged by entering as much information as you know about it in a freeform text box.

NOTE: The **Container** and **Document** links will always take you to the **Add to Cart** screen. If a Quick Add form has been assigned for filefolders, you will see that rather than the **Add to Cart** screen when you select the **Filefolder** link.



Describe the item you want imaged and complete any of the other fields. When you have finished, click **Add to Cart**. The item is added to the cart and all fields except Requestor and Cost Center are cleared. Continue adding any additional items you want, and when you have finished, click **Done**. The **Add to Cart Summary** appears



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