

# oneilOrder Client User Guide

# **Contents**

## Navigating oneilOrder

Overview	1
Access oneilOrder	1
Log In	1
Change Password	
Log Out	
Time Out	
Grids	4
Select/Unselect Rows	
Columns	
Column Format/Sort Format	
Context Menu	
Icons	
Dialog Boxes	
Export Grid	
Print Grid	
Column Heading Font	
Column Detail Font	
Page Settings	

## Inventory

Introduction	
Search Inventory	
Filtered Search	
Search Text Field	
Columns Searched	
Supported Searches	
Searches not Supported	
Search Filters	
Clear Filters	
Result Limit Exceeded	
Advanced Search	
Switch from Advanced to Filtered Mode	
Add Container	
Edit Existing Containers	
Add Filefolder	
Edit Existing Filefolders	
Add Tape	
Edit Existing Tapes	
View Item Activity	
Description.	
Keywords	
Find	
Find and Replace	
Contents	
Load From File/Save to File	41
Load from File	
Save to File	
Function Access	
Save List/Load List	

1

17

Save List	7
Load List4	
Function Access	8

## Order

#### 49

Cart	
Add Requests to Cart	
Containers, Filefolders, and Tapes	
Bulk Items	
Materials	
Services	
View/Edit Requests	53
Place a Web Order/Workorder	
Check Out Web Order	
Check Out Workorder	
Remove Requests from Cart	
Remove Current Row	
Remove Selected Rows	59
Order Status	
Search by Batch Number Range	61
Search by Tracking Number Range	
Search by Workorder Number Range	
Search by Ordered Date Range	61
Search by Order Status	
Search by Ordered By	
Search Results	

## Index

65-70

# **Navigating oneilOrder**

## **Overview**

Welcome to oneilOrder, which gives you access and control over your own stored records from any web browser, any time day or night, from anywhere in the world. oneilOrder allows you to access your record center's database and perform many tasks yourself, eliminating telephone calls and miscommunications.

Through oneilOrder and your Internet connection, you can query the record center database, request pickups or deliveries, check the status of your orders, and update the information associated with your stored items. oneilOrder's modern interface provides full text search functionality, robust filtering options, and easy access to critical business information all in real-time.

## Access oneilOrder

oneilOrder is accessed through your web browser using the URL provided to you by your record center. It is supported in Internet Explorer, Firefox, Chrome, Safari, and Microsoft Edge. Standard browser functions apply while using oneilOrder.

## Log In

Security is important to you and your records. oneilOrder 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.

	Please login to oneilOrder below
Account Information	^
User name	
Password	
MFA Code	
	Login

Enter your User Name and Password in the appropriate fields.

If your record center has set up multi-factor authentication, you will be required to enter an MFA Code. Multi-factor authentication (MFA) is a method of access control in which you are only granted access after presenting two or more different types of authentication. This adds an extra layer of protection on top of your User Name and Password.

oneilOrder uses the most common type of MFA, which involves generating a verification code (on your smart phone) that you need to input along with your User Name and Password. This requires the use of an authenticating app on your phone.

#### Google Authenticator

An authenticator app is used on your smart phone to generate the MFA verification code. O'Neil recommends Google Authenticator, although different apps may be used.

Google Authenticator provides a six digit one-time verification code that you need to enter in the oneilOrder Login screen.

For this to work, a set-up operation has to be performed the first time you log in after enabling MFA. oneilOrder provides a shared secret key over a secure channel, which is to be stored by the Authenticator app. This secret key will be used for all future logins to oneilOrder.

In order to break into your account, someone would need to know your User Name and Password and also your shared secret key, or have access to the physical device running the Authenticator app.

The Authenticator app generates a Time-Based One-Time Password (TOTP) every 30 seconds. This code is then entered on the oneilOrder Login screen. As long as the app is open, it will continue generating these codes, so if you mis-type one, you can wait 30 seconds for the next one to be generated. However, you must log in while the code is still showing. If you type in a code and wait too long before you log in, the login will fail.

#### Login

Once MFA has been enabled for your database, if you fail to log in twice for any reason, you will be presented with a **Resync** screen. For Time-Based One-Time Password (TOTP) authentication to function correctly, the time on the oneilOrder server and the time on the smart phone running the Authenticator app must stay in sync relative to each other. For this reason, if you fail to log in twice, the **Resync** screen is displayed and requires two consecutive codes so the time difference between the server and the phone can be determined. You may click **Cancel** and return to the **Login** screen to try to log in again, but if you fail to log in twice because your phone is out of sync, you will once again be returned to the **Resync** screen.

Record Center	Documentation BETA
User name	CURTIS
Password	
lf vou use an Multi-Fact	or Authentication token, the token may
be out of sync with our s token codes below to re	server. Please enter two consecutive

Enter your password and two consecutive Authentication Codes. Click **Resync and Login**.

## **Change Password**

To change your password at any time, click the down arrow next to your user name in the top right corner of the screen and select **Change Password**.

Irvine F	Records - CAROL -
	Change Password
	Logout
1	Logour

The **Change Password** dialog box appears.

Change Password		×
User Code	CAROL	~
Old Password	]	
New Password		
Confirm New Password		$\sim$
	Change Canc	el

Complete the fields and click **Change**.

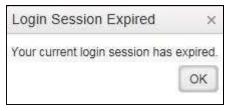
## Log Out

When you have finished using oneilOrder, you should always log out. Click the drop down arrow next to your user name in the top right corner of the screen and select **Logout**.



## **Time Out**

oneilOrder has a built-in time out feature. After a certain period of inactivity, you will be logged out.



You will be required to log in again in order to continue working.

## Grids

oneilOrder opens to the Search Inventory screen.

				S	Sea	arch	Inve	nto	ory <u>clear sea</u> r	ch		150	Requ	ests in Cart <b>∖⊒/ &gt;</b>
	Ту	pe text	here to	search	n inve	ntory					Sea	irch		
Filtered Search 👻 <u>clea</u>	ir filters									<u>7</u> 2		- 8- V	0	
Inventory Type	_ ^					Acco	unt	ŀ	tem Code	Alternate Ci	ode /	Add Date Ti	me	Order
<u>clear</u> Container Filefolder													*	Bulk Items Materials Services
<ul> <li>Tape</li> <li>Specific Inventory Type Manual</li> </ul>	+													Add Container Add Filefolder
Item Status	+													Add Tape
Account Code Range	+													Global Edit
Add Date	+													
Destroy Date	+													
Status Date	+													Options
From/To Date	+													Export Grid
Sequence Range	+													
Perm Flag	+													Images Order Status User Admin
						4 III							•	Order Approvals
4	*	14	4 (0		-	H	100	•	items per page	N	o items	to display	C	

At the top of the screen is a search field. Search filters display on the left side of the screen. Links to specific grids display on the right side of the screen.

Page numbers display at the bottom of the grid. Click a number to go directly to that page. You can also use the arrow icons to move one page at a time, or go to the first or last page.



Next to the page numbers you can select the number of items you want to display on each page. Click the drop down arrow to select a number. The right side of the screen displays the total number of items on the grid, as well as which ones are on the current page.

10		items per page	1 - 10 of 11859 items	Ċ
----	--	----------------	-----------------------	---

## Select/Unselect Rows

An item in the grid must be selected before any action can be taken for that item. When an item is selected, the row is blue. The current row has a dotted line around it whether it is a selected row or not.

					Searc	h Inver	itory clear searc	Ъ	146 Reque	ests in Cart <b>∖</b> ≣/ >		
		Type te:	kt here	to sea	rch inventor	y .		Search				
Search Filter clear filters 2										몰= 몸= 뱃		
Inventory Type	- ^				Account	Barcode	Alternate Code	Short Description	Add Date	Order		
clear		1	ň	8	1000	<u>12 -ZX</u>			9/23/2005	Bulk Items Materials		
Container (24)		2	₩		1000	200056			11/3/2003	Services		
Tape (64)		3	₩	•	1000	2136987			4/17/2009	Tasks		
Specific Inventory Type		4	ň		1000	236500			11/13/200	Add Container		
Specific Inventory Type Manual		5	₩		1000	356982			5/5/2006	Add Filefolder Add Tape		
Item Status	-	6	Ť		1000	134502	PPP		4/21/2000	Order Status		
clear		7	Ť	8	1000	134503	148		4/21/2000	Export Grid		
Destroyed (2)		8	ě	•	1000	134514	140		4/23/2000	Print Grid		
✓ In (24)		9	Ĭ		1000	134515	141		4/23/2000			
Out (25) Pending (1)		10	ě	1	1000	<u>134516</u>	142		4/23/2000			
Account Code		11	ň		1000	134517	143		4/23/2000			
- 🗌 1000 (18) 🗸 o	~	12	141	F	1000	134521	161		4/23/2000			
< 5000 (B)	-	()	•)(1	•	(H)(H)	100 💌	items per page	1 - 24 of 1	24 items 🔿			

**NOTE**: It is possible to change the default colors in the system, so your colors may be different.

Whenever rows are added to any grid, they are automatically selected.

## Columns

Data in a grid can be sorted by column in ascending or descending order. To sort on a column, click in the column heading field. An up or down arrow displays to let you know whether it is sorting in ascending or descending order. Click the heading again to reverse the sort order. Click again to return to the default sort order.

Account 🔺	Barcode 🔻	Alternate Code
1000	F60153	
1000	996333	
1000	<u>996326</u>	
1000	<u>996325</u>	
1000	963236	
1000	<u>569555</u>	
1000	363333	
1000	<u>134701</u>	154
1000	<u>134529</u>	169
1000	134528	168

Columns cannot be removed from a grid; however, the order they appear in the grid can be changed. To move a column, click on the column heading and drag to the new location.

Alternate Code	AC + Status	itatus	Short Description
	9/29/2000	In	
	5/17/2016	Pending	
	5/17/2016	Pending	
	5/17/2016	Pending	
	5/16/2016	Pending	
	5/17/2016	Pending	
	5/17/2016	Pending	
154	4/22/2000	In	

The **+** in the column heading indicates that it is being moved.

## **Column Format/Sort Format**

If your record center has set up Column and Sort Formats for you, they will be available in grids from the **Settings** menu. Click the **Settings** icon and select the option you want.

				;	Sea	arcl	h Invento	ory	141	Requi	ests in Cart \ <b>⊒</b> ∕>
Advanced Search 👻								0- C 0- C	+ +	1	
Quick Query		*					Item Code	Alternate Code	Add Date Time	c	hoose Column Format
AccessCount (Container)	*		1	Ť	-		134500	XYZ	4/21/2000 12:00 AM	С	hoose Sort Format
Description			2	Ť	-		134501	XYY	4/21/2000 12:00 AM	101	Materials
			3	ý	-		134502	PPP	4/21/2000 12:00 AM		Services
			4	ý	•	~	134503	148	4/21/2000 12:00 AM		Inventory
			5	前	-		134504	TTT	4/21/2000 12:00 AM		Add Container
	- li		6	ý	-		134505	MMM	4/21/2000 12:00 AM		Add Filefolder
Clear All Items on Grid		•	7	₩.	-		134506	151	4/21/2000 12:00 AM		Add Tape
Search Results			8	14	<b>F</b>		134507 4	152	4/21/2000 12:00 AM	+	- Global Edit
Matched Added				• (1		)•	H 100	Items per page		C	Container Filefolder
Audeu									1 - 100 of 235 items		

## Choose Column Format

The Column Format determines which columns appear in the grid.

Column Format			×
Column Format	DEFAULT_VIEW_STD *		•
		ОК	Cancel

Click the drop down list to display all of the column formats that have assigned to you. They are sorted by name in ascending order. The default column format has an asterisk next to it. Select the one you want, and click **OK**. The columns in the grid are updated and the grid is refreshed with the new data. Your selection is saved until you change it.

## **Choose Sort Format**

The Sort Format determines the order in which data is sorted in the grid.

Sort Format	Account Code / Alt Code	*
-------------	-------------------------	---

Click the drop down list to display all of the sort formats that have been assigned to you. They are sorted by name in ascending order. Select the one you want, and click **OK**. The grid is re-sorted and refreshed. Your selection is saved until you change it.

## **Context Menu**

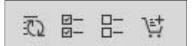
Right click on a row to bring up a context menu.

					Searc	h Inver	itory	lear searc	b		146 Reque	sts in Cart <b>∖</b> ≣/ >
		Type tex	t here	to sea	rch inventory	(				Search		
Search Filter clea	r filters									<u>7</u> 2	8- B- A	
Inventory Type	- ~				Account	Barcode	Alternat	le Code	Short Descript	ion	Add Date	Order
<u>clear</u>		1	Ť		1000	<u>12 -ZX</u>					9/23/2005	Bulk Items Materials
Container (24)		2	洴	1	1000	200056					11/3/2003	Services
Tape (64)		3	Ŵ		1000	2136987					4/17/2009	Tasks
Specific Inventory Type		4	Ť		1000	236500		Edit			11/13/200	Add Container
Specific Inventory Type Manual	+	5	₩		1000	356982		Selec	t All		5/5/2006	Add Filefolder Add Tape
Item Status	-	6	Ŵ		1000	134502	PPP	Unsel	ect All		4/21/2000	Order Status
clear		7	Ť		1000	134503	148	Add It	em to Cart		4/21/2000	Export Grid
Destroyed (2)		8	Ť		1000	134514	140	Add S	elected Items to	Cart	4/23/2000	Print Grid
✓ In (24)		9	Ť		1000	134515	141		Container		4/23/2000	
Out (25)		10	Ť	5	1000	134516	142	Add F Add T	ilefolder		4/23/2000	
Account Code	-	11	Ť		1000	134517	143		apa		4/23/2000	
- 🗌 1000 (18) 🗸 👳		12	141	F	1000	134521	161				4/23/2000	
< 5000 (B)			0(1	•		100 🔻	items per	page	1	- 24 of 2	14 items 🔿	

You can edit the record for that item or select from other menu options. The options in this menu are also available elsewhere on the screen.

#### lcons

Each grid contains the following icons.



**Reload Results**: Recomputes the data associated with the grid and displays the first page of the grid.

Select All: Selects all items that are displayed in the grid.

Unselect All: Unselects all items that are displayed in the grid.

Add Selected Items to Cart: Adds all selected items in the grid to the cart.

## **Dialog Boxes**

Dialog boxes display to request needed information. Within the dialog boxes there are different types of fields.

Description	Contents						
Account			Item Status Status Date		ng 016 9:51 AM		
Barcode			Add Date	9/29/2	016 9:51 AM		
Alternate Code			User Define	ed			
Description			User Define	ed Fi			
Retention Information	ation		User Define	ed Fi			
Record Series			User Define	ed Fi			
Destroy Date			User Define	ed Fi			
Perm Flag	No		CUSTOM E	ATE			
			Sequence I	Range	Date R	ange	
			From		From		
			To		То		

## **Grid Picker**

Some fields require an entry from pre-determined data. In this case a grid picker is available. For the field below, to bring up a list of available accounts, click the grid picker.

Account	1
1000	

The **Account** grid appears.

Optio	ns Search	Format	
	2		
	Account Code	Account Description	
1	1000	Newport Bank	
2	2000	Insurance Company	1
3	3000	Law Firm	
4	4000	Hospital	
5	1001	ABC Medical	
6	ABC CORP	ABC Corporation	
7	8000		
8	9000	Barrington Medical	
9	CITYHOSP	City Hospital	
10	XYZ CO		
~	2 3	4 5 6 7 🕞 🖌	~

Right click on the account you want and select **OK**. The grid closes and your selection displays in the Account field.

You can also manually type in the data. As you start typing, the field autopopulates. If more than one item fits the first few numbers you typed, a list appears with all matching accounts beginning with the numbers you entered. You can select from the list or continue typing.

	1000	
	1000	
Bai	1001	

## **Date/Time Fields**

Date and Time fields default to the current date at 12:00 AM. You can enter the date and time, or click the date or time picker.

## Date Picker

The date picker brings up a calendar for you to make your selection.

Destroy Date	5/17/	2016	0	Ð			
Perm Flag			M	ay 20	16		•
	Su	Мо	Ти	We	Th	Fr	Sa
	24	25	26	27	28	29	30
	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	31	1	2	3	4
		Tue	sday	, May	17, 2	016	

Click the left and right arrows at the top to move to the next or previous month. Click on the month/year to bring up a list of all months.

٠	20	16	•
Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec
Tu	iesday, M	ay 17, 20	16

Click the left and right arrows at the top to move to the next or previous year. Once you make your selection, you are instantly returned to the previous screen.

Highlights the same day from the next week

Navigates to the previous month

Navigates to the next month

Navigates to the next view

Navigates to the previous view

Highlights the first day of the month

Highlights the last day of the month

other views, navigates to a lower view.

If in "month" view, selects the highlighted day. In

Keys	Action
Left arrow	Highlights the previous day
Right arrow	Highlights the next day
Up arrow	Highlights the same day from the previous week

You can also use the following keyboard shortcuts to select dates.

#### Date/Time Picker

Down arrow

Ctrl + left arrow

Ctrl + right arrow

Ctrl + down arrow

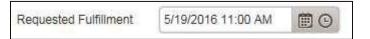
Ctl + up arrow

Home

End

Enter

There is also a date/time picker that combines both date and time in the same field.



The date and time pickers are side by side. Click them individually to make your selections.

## **Errors/Warnings**

If an invalid entry is made in a field, the field is highlighted in red with an error/warning icon.

Barcode	63256	2
Barcode	63256	

Click the icon to view the message.

Account		
1000	Data Entry Errors	×
Barcode	Invalid barcode length entere	d for item
Alternate Code	( )	

Click the X to close the message. You cannot save the dialog box until the error is corrected.

Errors/Warnings that relate to the entire dialog box display in the top right corner. Click the red icon to display the message.

Container Edit				0	×
Description	Contents			Form Errors X	-
Account 1000			Item S	General  A Item's account (1000) does not match the account defined in the account range (4000)  Acknowledge	1
Barcode	134820		Add D	ate 2/8/2000 12:00 AM	
Alternate Code	P566321		User [	Defined	

Errors need to be corrected. Warnings do not require action, they just need to be acknowledged. Select the check box to acknowledge the error. Click the X in the top right corner to close the message. You cannot save your change until the error has been corrected or the warning has been acknowledged.

## **Export Grid**

All grids in oneilOrder have an Export feature. This allows you to export data to a text file that can be viewed in other programs.

Load the data you want to export onto the grid. Click the **Export Grid** link in the **Tasks** section on the right side of the screen. The **Export Grid** dialog box appears.

Number of fields:	19	
Format		_
Delimited		
Delimiter		
Vertical Bar		
🔘 Comma		
🔿 Tab		
O Semicolon		
O Other		
Quotes around f	elds	
O Fixed		
Record Length:	331	0

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

To change the margins, click **Print Format**.

Margins			à
Left	0.25	Å,	
Right	0.25	\$	
Тор	0.25	A V	
Bottom	0.25		

Adjust your margins as necessary and click **Print** to return to the **Export Grid** dialog box. Click **OK** to begin the export.

When the export has completed, you are notified of the number of records exported.

Export		×
Completed.		~
Records Exported:	52	Ý
		Close

Click **Close**, and you can choose to open or save the file.

## **Print Grid**

This option is used to print the data displayed on a grid. The data in the grid is formatted into a printable black and white table.

Heading	1		Page Settings Margins				
Description			Left	0.25	* )		
Column Headi	ng Font Arial		Right	0.25	*		
Font Size	12	*	Тор	0.25	×		
Bold [		Vinderline	Bottom	0.25	Å V		
Column Detail	Font		Paper Size	Letter (8.5	5 in. <mark>b</mark> y 11 in	.) 🔻	Ĩ
Font Name	Arial	•	Orientation	Portrait		•	1
Font Size	10	•	Output Format	PDF		•	
			Border Around	t Cells 🗍 S	Shade Altern	ate Rows	

Enter a Heading and Description for the report that will print from the grid.

## **Column Heading Font**

This section applies to the column heading text only. Click the drop down arrow next to Font Name to select from the available fonts. Click the drop down arrow next to Font Size to select a font size. You can also select Bold, Italics, or Underline.

## **Column Detail Font**

Select the Font Name and Font Size for the text in the columns.

## **Page Settings**

You can adjust the margins, select a paper size, and select the page orientation (portrait/landscape).

Next, select the Output Format. You can save the grid as a PDF, Microsoft Excel spreadsheet, or Microsoft Word document.

Finally, you can choose to print a border around the cells, and/or shade alternate rows to make the report easier to read.

When you have completed all fields, click **Print** to save the report.

**NOTE**: When you print a grid, remember that only selected rows on the grid will print.

The File View dialog box displays your report.

		Containers Ad	lded on 4/21/2000			- E
Account	Barcode	Alternate Code	Short Description	Add Date	Destroy Date	1000 C
1000	134500	145		4/21/2000	9/1/2001	
1000	134501	146	1	4/21/2000	9/1/2001	
1000	134502	147		4/21/2000	9/1/2001	
1000	134503	148	8	4/21/2000	9/1/2001	
1000	134504	149		4/21/2000	10/1/2001	
1000	134505	150		4/21/2000	10/1/2001	
1000	134506	151		4/21/2000	10/1/2001	
1000	134507	152		4/21/2000	10/1/2001	
1000	134508	153		4/21/2000	10/1/2001	

Click **Open in New Tab** to view your report in full screen.

# Inventory

## Introduction

oneilOrder and its connection with your record center's database means 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.

You can add new items at the click of a button, or search for all the existing items that you want to edit. The database at the record center will be searched, and the items that meet your criteria will be loaded onto your screen. Once the items are loaded, you can view and edit fields for an item, or add the item to your cart.

## **Search Inventory**

	Search Inventory clear search	ests in Cart ∖़⊒/ >
	[Type text here to search inventory Search	
Filtered Search 👻 <u>clear filters</u>	50 # H H \ \ 0	
Inventory Type _ ^ dear Container Filefolder Tape Specific Inventory Type Manual + Item Status + Account Code Range + Add Date + Destroy Date + Status Date + Status Date +	Account Item Code Alternate Code Add Date Time Destroy D Contents Rang Cor	Order Bulk Items Materials Sarvices Inventory Add Container Add Filefolder Add Filefolder Global Edit Container Filefolder Liste - Options Excert find
Sequence Range + Perm Flag +		Print Grid Images Order Status User Admin Order Approvals
* 100	▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ▲     ↓       ↓ </td <td>Crass rapprovate</td>	Crass rapprovate

#### oneilOrder opens to the Search Inventory screen.

There are two different search modes available, Filtered Search and Advanced Search.

Filtered Search 🔹	clear filte
Filtered Search	_
Advanced Search	
Container	
i Filefolder	
🔲 Таре	
Specific Inventory Type N	Manual +
Item Status	+
Associat Code Dance	

## **Filtered Search**

At the top of the screen is a search field. Search filters display on the left side of the screen. Additional options display on the right side of the screen.

## **Search Text Field**

To initiate a search, enter text into the Search text field and click **Search** or press the **Enter** key. To clear the results of a previous search, click Clear Search. This clears all results and all filters. You can also clear the contents of the Search text field (which will revert to the hint) and click **Search** or press **Enter**. Merely tabbing out of the field will not initiate (or clear) a search.

The search will be completed on all items in the database. To limit the search, filters can be applied.

## **Columns Searched**

The text search searches across all of the text columns relating to items. The following columns are included:

- Item Code
- Short Description
- Alternate Code
- User Defined Field 1
- User Defined Field 2
- User Defined Field 3
- User Defined Field 4
- Item Set Name
- Sequence Begin
- Sequence End
- Contents

- Long Description
- Item Code Alias
- Item Keyword

## **Supported Searches**

Below are some examples of searches that are supported in oneilOrder.

- If you enter a single word (e.g. *smith*), that word must appear in at least one of the indexed fields above to return that item.
- If you enter two or more words separated by spaces (e.g. *john smith*), all of those words must appear in at least one of the indexed fields above to return that item. The order of those words does not matter.
- If you enter text surrounded by double quotes (e.g. *"smith john"*), the whole string must appear in at least one of the indexed fields above to return that item.
- Quoted text and non quoted text can be mixed. e.g. "*smith john*" *medical* means the string *smith john* and the word *medical* must appear in at least one of the indexed fields above to return that item. The order of the two does not matter.
- If you put an asterisk (\*) at the end of a word, the asterisk matches zero, one, or more characters following the word. e.g. *jo*\* would match "john", "joe", "josh" etc. *jo*\* *smith* would match "john smith", "smith joe" etc.
- Searches are not case sensitive.

## **Searches not Supported**

The following searches are not supported.

- *john AND smith* The "AND" keyword is not supported. However, words are automatically "AND-ed" together.
- *john OR smith* The "OR" keyword is not supported.

There are also some words and characters that will not be matched:

- Searching for individual numbers or characters. These are not indexed by SQL Server's Full Text Search. So searching for *A* will not match items with an "A" in them.
- Searching for one of 116 words that SQL Server's Full Text Search does not index because they are considered too commonly used. These words are as follows: about, after, all, also, an, and, another, any, are, as, at, be, because, been, before, being, between, both, but, by, came, can, come, could, did, do, does, each, else, for, from, get, got, had, has, have, he, her, here, him, himself, his, how, if, in, into, is, it, its, just, like, make, many, me, might, more, most, much, must, my, never, no, now, of, on, only, or, other, our, out, over, re, said, same, see, should, since, so, some, still, such, take, than, that, the, their, them, there, these, they, this, those, through, to, too, under, up, use, very, want, was, way, we, well, were, what, when, where, which, while, who, will, with, would, you, your.

**NOTE**: These words are language dependent so the words above are for the English language which would be the default Full Text Search language for most databases.

• Leading zeros on strings may be ignored when doing a partial match. For example, 0000123\* will match "0000123" but it will also match "0123" or "123".

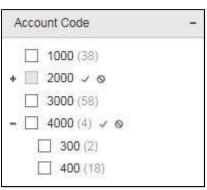
## **Search Filters**

Search filters are used to narrow down your search.

Filtered Search 🔹	<u>clear filter</u>
Inventory Type	- 1
<u>clear</u>	1
Container	
Filefolder	
🔲 Таре	
Specific Inventory Type M	anual +
Item Status	+
Account Code Range	+
Add Date	+
Destroy Date	+
Status Date	+
From/To Date	+
Sequence Range	+
Perm Flag	+

Click the + to expand a section. Click the - to close a section.

Filters such as accounts that contain sub accounts are displayed in a tree view.



Once a filter is selected, the filter count appears next to each selection. This is the number of items that match the criteria and are included in your results. The + and - icons can be used to expand or collapse the accounts.

The **Check all** and **Uncheck all** icons can be used to select or unselect all subaccounts under the main account.

## Inventory Type

Select the check box for the type of item you want.

Inventory Type	-
clear	
Container (132)	
Filefolder (147)	
Tape (115)	

#### Specific Inventory Type

This filter displays all available sub-types of the Inventory Type selected. If Container is the only Inventory Type selected, then only Container sub-types will be displayed here.

When no filters have been selected and no search text has been entered, this panel will not display.

Specific	Inventory Type -
clear	
- 🗌 C	container 🗸 🖉
-	Container (24)
	Letter/Legal Box (104)
	8MM Tape Small Tote (4)

## Specific Inventory Type Manual

This filter lets you manually select the Specific Inventory Type you want.

Specific Inventory T	ype Manual 🗕
clear	

Click the grid picker to display the **Object** grid.

Optio	ns Search	Format			
	R				
	Object Code	Object Description	Unit Volume		T
1	1.2 BOX	1.2 Cu Ft Container	1.2000000000		
2	3460	3460	0.000000000		
3	3480	3480	0.0000000000		1
4	8 MM FILM	8 MM Film	0.0000000000		
5	ARCHIVE	One Cube	0.0000000000		1
6	BOX-CT	Box-Check Transfer	0.000000000		1
7	BOX-HISE	Box-High Security	0.0000000000		
8	BOX-STD	Box-Standard File	0.0000000000		1
9	BOX-TP	Box-Tape Storage	0.0000000000		
10	CHECK B	Check Box	0.000000000		
				200	
	<			>	

Right click on the object type you want and click  $\mathbf{OK}$ .

Optio	ns Search	Format				
	R					
	Object Code	Object Description		Unit Volume		T
1	1.2 BOX	1.2 Cu Ft Container	r:	1.2000000000		
2	3460	3460		0.0000000000		1
3	3480	3480		0.0000000000		1
4	8 MM FILM	8 MM Film		0.0000000000		
5	ARCHIVE	One Cube		0.0000000000		1
6	BOX-CT	Box-Check Transfe	r	0.0000000000		
7	BOX-HISE	Box-High Security	0.0000000000			
8	BOX-STD	Box-Standard File		0.0000000000		
9	BOX-TP	Box-Tape Storag	OK	0.0000000000		8
10	CHECK B	Check Box	Cancel	0.0000000000		
	<				>	
	2.					

## Item Status

Select from the available item statuses.

Item	Status
	Destroyed (193)
	In (6475)
	Out (17864)
	Perm Out (8)
	Pending (4)

**Destroyed**: A status of Destroyed means the item has been destroyed and no longer exists.

In: A status of In means the item is at the record center.

Out: A status of Out means the item is at the customer site.

**Perm Out**: A status of Perm Out means the item was returned to the customer and will not be coming back to the record center.

**Pending**: A status of Pending means the item was added by the customer via oneilOrder, but has not yet been accepted by the record center.

#### Account Code

Select from the available accounts/sub accounts. Only accounts that you have access to are displayed.

When no filters have been selected and no search text has been entered, this panel will not display.

Account Code	-
☐ 3000 (66906) - ☐ 4000 (6) ✓ ⊗ ☐ 300 (2) ☐ 400 (19)	

#### Account Code Range

To search for items belonging to more than one account at a time, you can enter a range of accounts.

Account Code	Range -
clear Level 1 From	То
Level 2 From	То
Level 3 From	То
Include Sub	Accounts

Select the *Include Sub Accounts* check box if you want to include all sub accounts for the account range you entered.

Click **Apply** to include the account code range in your search.

## Add Date

Add date is the date an item was added to the database. To include an Add Date in your search, click the drop down arrow in the top field.

Add Date		( <u></u> )
clear		
	*	
From date		
	Ē	
To date		
Apply		

Select from the available options.

Any Date	1
Last 7 days	
Yesterday	
Today	
Tomorrow	
Next 7 days	
Between	

If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.

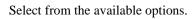
•		М	ay 20	16		
Su	Мо	Ти	We	Th	Fr	Sa
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	3	2	3	4
	Thu	rsday	, May	12, 2	016	

Once you have entered your dates, click **Apply**.

#### **Destroy Date**

Destroy date is the date an item is scheduled to be destroyed, or was already destroyed. To include a Destroy Date in your search, click the drop down arrow in the top field.

Destroy Date		
<u>clear</u>		
	•	
From date		
To date		
	Ē	
Apply		



Any Date	]
Last 7 days	
Yesterday	
Today	
Tomorrow	
Next 7 days	
Between	
Blank Date	

If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.

•		May 2016						
Su	Мо	Ти	We	Th	Fr	Sa		
24	25	26	27	28	29	30		
1	2	3	4	5	6	7		
8	9	10	11	12	13	14		
15	16	17	18	19	20	21		
22	23	24	25	26	27	28		
29	30	31	3	2	3	4		
	Thu	rsday	, May	12, 2	016			

Once you have entered your dates, click **Apply**.

#### Status Date

Status date is the date the last action took place for the item. For example, it could be when the item was scanned into the record center, or scanned out to a customer. To include a Status Date in your search, click the drop down arrow in the top field.

Status Date	e)	<u>-</u> :
<u>clear</u>		
	*	
From date		
To date		
	Ê	
Apply		

Select from the available options.

Any Date	
Last 7 days	
Yesterday	
Today	
Tomorrow	
Next 7 days	
Between	

If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.

•	May 2016							
Su	Мо	Ти	We	Th	Fr	Sa		
24	25	26	27	28	29	30		
1	2	3	4	5	6	7		
8	9	10	11	12	13	14		
15	16	17	18	19	20	21		
22	23	24	25	26	27	28		
29	30	31	1	2	3	4		

Once you have entered your dates, click **Apply**.

## From/To Date

The From/To Date is information you provided to the record center to help identify an item. For example, if you have a container of medical records for 2013, the From/To Date might be "From:1/1/13 To 12/31/13" To enter a date that falls within the From/To Date Range for an item, type a date or click the grid picker to select a date.

From/To Date	( <u>4</u> ))
clear Enter a date within From/To	

#### Sequence Range

The Sequence Range is information you provided to the record center to help identify an item. For example, if you have a container of personnel files, the sequence might be "From: ABERCROMBIE To: CRAWFORD. You can enter text that falls within the Sequence Begin/End range for the item. So for the example given, if you were looking for a personnel file for BROWN, you can type that here and the container listed above would be included in the results.

<u>clear</u>		
Within	Sequence Begin/En	d

## Perm Flag

Perm Flag is a field that indicates whether an item is to exist indefinitely and should never be destroyed. Select whether you want to search for items with a Perm Flag of No or Yes.

Perm Flag	-
<b>No</b> (92)	
Yes (23)	

## **Clear Filters**

Each filter section has a **Clear** link that clears that specific filter. The results in the grid will be updated to reflect the cleared filter.

At the top of the Search Filter section is a **Clear Filters** link that clears all filters. All results displayed in the grid that are based on the filters will be cleared.

## **Result Limit Exceeded**

A maximum of 5,000 items can be displayed in the results grid. If your search returns more than 5,000 items, you are informed and only the first 5,000 records are added to the grid. To close the message, click the X in the corner.

(1) Your search exceeded the maximum number of ×
results. Only 5,000 records can be displayed.

Filter counts will not be available until you apply additional filters to narrow the results. Any time filter counts are not available, a note is included in the Search Filter section.

Search Filter	<u>clear filters</u>
Inventory Type	- 📈
clear Filter counts not available. Container Filefolder Tape	
Specific Inventory Type	+
Specific Inventory Type Mar	nual +

## **Advanced Search**

Advanced Search displays the Quick Query panel.

**NOTE**: Quick queries are set up by your record center and then assigned to you. If no quick queries have been assigned, the Quick Query panel does not display.

			Sea	arch Inve	entory		138 Requ	ests in Cart <b>\≞/&gt;</b>
Advanced Search 💌						0- 0- 0- 1 0- 0- 0- 1		
Culck Query Containers Account (Conta				Account	Item Code	Alternate Code	Destroy D (	Order Bulk Items Materials Services Inventory Add Container Add Container Add Tace Global Edit Container Ellefolder Ellefolder Tace
Search Results Matched Added	•	4 4 0		4 H 100	items per pag	ie No item	s to display 💍	Options Load From File Save To File Load List Save List Export Grid

**Quick Query**: The drop down list displays the name of all quick queries that have been assigned to you by the record center. The list is sorted by the quick query name in ascending order. The last used quick query is selected by default. If the quick query was created specifically for the container, filefolder or tape grids, that is specified in parenthesis after the quick query name. That means that quick query will only returns items of that type. If there are no parenthesis, the query will return all item types you have access to.

**Description**: This is the short description your record center has given the quick query.

**Clear All Items on Grid**: When selected, the grid is cleared before the quick query is executed. When not selected, new items are appended to the grid, which allows you to accumulate results using multiple quick queries.

**Parameters**: If the quick query has parameters, there will be a field for you to enter them. This may be a text box, date/time picker, etc. The last used parameters are populated by default.

Click **Search** to run the query.

**NOTE**: If you add a container, filefolder, or tape while in the Advanced Search mode, the row is added to the grid.

#### Search Results

A search results panel displays the number of records that were matched and added by the last quick query search. Any modification to the results will clear these numbers until the next quick query search is run.

#### lcons

Two additional icons are displayed in the Advanced Search mode.



Clear Selected: removes all selected items from the grid.

Clear All: removes all items from the grid.

## Switch from Advanced to Filtered Mode

If you run a quick query under Advanced Search, and then switch to Filtered Search, the grid remains populated with the results. The Filtered Search mode is restricted to consider only the items that were identified by the Advanced Search mode. That means any additional filters chosen, including a text search, will be applied to the restricted set of items.

							ntory clear se				
	12	ype text h	ere to s	earch	restri	cted inventory		Restricted Se	arch		
Filtered Search 🔹 clea	ar filter	<u>s</u>						范 🗄	= == \# 4	j)	
Restriction	-	1				Account	Item Code	Alternate Code	Destroy D		Order
clear		1	ý	-		1000	134529	169	12/31/2004	4	Bulk Items
Restricted to 45 items 👩	. 1	2	₩	1		1000	333659				Materials
Resincted to 45 items		3	Ϋ́	-	0	1000	200056		11/3/2006		Services
Inventory Type	-	4	ě	-		1000	632598				Inventory
clear	-1	5	$\forall \!\!\!\!/$	-	2	1000	134526	166	12/31/2004		Add Container
Container (45)	- 1	6	Ť			1000\5000	<u>134509</u>	135	12/31/2003		Add Filefolder
Specific Inventory Type	+	7	Ä	-	~	1000	369856				Add Tape
Specific Inventory Type	-	8	ý	•		1000\5000	134505	MMM	8/14/2001		Global Edit
Specific Inventory Type Manual	+	9	ý	-	2	1000\5000	<u>134512</u>	138	12/31/2003		Container
Item Status	+	10	Ť			1000\5000	<u>134508</u>	153	8/14/2001		
Account Code	+	11	Ť	۲		1000	134518	144	12/31/2003		
		12	ý			1000	236500				Options
Account Code Range	+	32	14	Field	5	1000	256002				Export Grid

A Restriction panel is displayed at the top of the Search Filters panel. It indicates the number of items from the last Advanced Search that the results are restricted to. The panel title is blue to bring attention to it. A **Help** icon is also included. Hover over the icon to display a message explaining the restriction.

The **Search** button next to the full text search box also indicates that the search is restricted.

## **Add Container**

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

To add a new container, click **Add Container** under Tasks on the right side of the screen. You can also right click on the grid and from the context menu, select **Add Container**.

Container Add							□ ×
Description Co	ntents						
					Form	Container Add C	omplete 🔹
Current Status P	ending			Container Type CONTA	INER		
Accou	nt		Barcode *		Alternate Co	de	
Level 1							
	<b>(</b>						
Destroy Date		Ċ.	Contents Range Start		Contents Ra	nge End	
Contents Start Date		Ċ.	Contents End Date		Custom Field	н 🗌	
Custom Field 2			Custom Field 3		Custom Field	14	
Custom Date			Category		Record Serie	s	
Set Name			Description		Contents		
					to		le
Permanent Item *	No	•					*
						Add A	Add to Cart Reset Cancel

Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

Enter your data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to add the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

Container Add	
Description	Contents
Account	
2000	Data Entry Errors X
Barcode	Barcode' field is required
Alternate Code	
Description	
Retention Informat	ion
Record Series	(m)

Click the **X** to close the message.

Once you have completed all fields, click **Add** to add the container to the database. If you want to add the container and immediately place it in your cart, click **Add to Cart**.

Continue adding any additional containers. When you have finished entering data, click **Cancel** to return to the **Results** grid.

## **Edit Existing Containers**

Data for existing containers can be edited using oneilOrder. 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. Once the container is loaded, right click on it and from the context menu, select **Edit**.

**NOTE**: You can also bring up the **Edit** form by clicking on the item's barcode link in the grid.

Description	Contents					
Account			Item Status In			
3000	) 🗐 👌		1			
			Status Date 9/1	1/2000 11:05 AM		
Barcode	000006		Add Date 9/1	Add Date 9/11/2000 12:00 AM		
Alternate Code			User Defined			
Description			CUSTOM FIELD 1			
Retention Informa	ation		CUSTOM FIELD 2			
Record Series		8	CUSTOM FIELD 3			
Destroy Date			CUSTOM FIELD 4			
Perm Flag	No v		CUSTOM DATE			
			Sequence Range	Date Range		
			From	From	<b>(</b>	
			То	То		

Make your changes or enter new data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to edit the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

Once you have completed the fields, click Edit.

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

## **Add Filefolder**

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

To add a new filefolder, click **Add Filefolder** under Tasks on the right side of the screen.

Filefolder Add							
Description Cont	ents						
					Form	Filefolder Add Cor	mplete 💌
Current Status Pe	nding						
Account			Barcode *		Alternate Co	de	
Level 1							
	m						
	1						
Short Description			Container Barcode	10	Custom Field	d 1	
Custom Field 2			Custom Field 3		Custom Field	d 4	
Custom Date			Contents Range Start		Contents Ra	nge End	
Contents Start Date			Contents End Date		Category		
Record Series			Set Name	11	Destroy Date	Ð	ti i
			Description		Contents		
Permanent Item *	No	•	Description		Contents		

Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

Enter your data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to add the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

Filefolder Add		
Description Data Entry E "field is requir	0	
Barcode	12345698	
Alternate Code		
Description	Ĩ	

Once you have completed all fields, click **Add** to add the filefolder to the database. If you want to add the filefolder and immediately place it in your cart, click **Add to Cart**.

Continue adding any additional filefolders. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

# **Edit Existing Filefolders**

Data for existing filefolders can be edited using oneilOrder. 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. Once the filefolder is loaded, right click on it and from the context menu, select **Edit**.

**NOTE**: You can also bring up the **Edit** form by clicking on the item's barcode link in the grid.

Description	Contents				
Account 4000	400		Item Status Dest Status Date 4/24/	oyed 2000 4:33 PM	
3arcode	0000004		Add Date 4/24/	2000 12:00 AM	
Alternate Code	1123775		User Defined		
Description			CUSTOM FIELD 1		
Contained-In			CUSTOM FIELD 2		
arcode	134802	Destroyed	CUSTOM FIELD 3		
lternate Code	P435675		CUSTOM FIELD 4		
Date	4/24/2000		CUSTOM DATE		
Retention Information	ation		Sequence Range	Date Range	
lecord Series			From	From	Ē
estroy Date			То	То	Ē
Perm Flag	No v				

Make your changes or enter new data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to edit the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

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

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

# Add Tape

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

To add a new tape, click **Add Tape** under Tasks on the right side of the screen.

Tape Add				
Description Contents				
			Form TAPE A	dd Complete 🔹 👻
Current Status Pending		Таре Туре ТАРЕ		
Account	Barcode *		Alternate Code	
Level 1				
Level 2				
Level 3				
	1		Custom Field 1	
Short Description	Container Barcode		Costom Field 1	
	Container Barcode		Custom Field 4	
Short Description Custom Field 2 Custom Date				
Custom Field 2	Custom Field 3		Custom Field 4	
Custom Field 2	Custom Field 3		Custom Field 4 Contents Start Date	
Custom Field 2 Custom Date	Custom Field 3		Custom Field 4 Contents Start Date Contents Range Start	

Your record center may have created custom data entry forms for you. To view available forms, click the Form drop down list and make your selection. The default is automatically set to the last form you opened.

Enter your data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to add the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

2	
Description	Contents
Account	
1000	Data Entry Errors ×
Barcode	Barcode' field is required
Alternate Code	
Description	

Once you have completed all fields, click **Add** to add the tape to the database. If you want to add the tape and immediately place it in your cart, click **Add to Cart**.

Continue adding any additional tapes. When you have finished entering data, click **Cancel** to return to the **Inventory** grid.

# **Edit Existing Tapes**

Data for existing tapes can be edited using oneilOrder. 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. Once the tape is loaded, right click on it and from the context menu, select **Edit**.

**NOTE**: You can also bring up the **Edit** form by clicking on the item's barcode link in the grid.

Description	Contents						
Account			Item Status In Status Date 3/3/2	2000 7:59 PM			
Barcode	14623002	E COMPANY	Add Date 11/5	/1999 12:00 AI	M		
Alternate Code			User Defined				
Description			CUSTOM FIELD 1	ĺ			
Contained-In			CUSTOM FIELD 2				
Barcode			CUSTOM FIELD 3				
Alternate Code			CUSTOM FIELD 4				
Date	Ē		CUSTOM DATE		Ē		
Retention Informa	ation		Sequence Range	Date R	ange		
Record Series	PAY	Payroll records	From	From	3/3/2000		
Destroy Date			То	То	3/3/2000	Ē	
Perm Flag	No 🔻						1

Make your changes or enter new data in the appropriate fields. Click the grid picker next to a field to display a list of available options. Right click on your selection in the grid and select **OK**.

Click the date picker next to date fields to display a calendar from which you can select a date.

Some fields are required. If you try to edit the record without completing a required field, the field is displayed in red. Click the exclamation point icon for an explanation.

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

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

# **View Item Activity**

You can view all activity for an item from the **Inventory** grid. Right click on an item in the grid and select **View Item Activity**.

nem m me gna ana seleca	thew item Activity.
Alt + Shift + 7	simulate "Move First" button click
Alt + Shift + 8	simulate "Move Previous" button click
Alt + Shift + 9	simulate "Move Next" button click
Alt + Shift + 0	simulate "Move Last" button click

# Description

Each item in the system can be given a unique description. To enter the description, in the item's **Add** or **Edit** dialog box, click **Description**.

Description for 996325				×
				>
Matches Keyword		Add Edit		
Highlight Keywords	>	Delete Current line: 1	Total lines: 1	~
		control interation	C	ancel

Description text is entered in the top section. The current line being edited and the total number of lines are displayed in the lower right corner.

## **Keywords**

Keywords can be added in the bottom section. Click **Add**.

Add Keyword	×
Keyword	
	Add Cancel

Type your keyword and click **Add**.

n a	343 A.*			-
	<b>M</b> 14	SEN CENTRAL		
Main Bra	nch: Los Angeles, Califo	ornia		
	ry Branches: d, California Texas			
	video footage of <b>parkin</b> d in CMC 370 machines			
Matches	Keyword		Add	
Matches 2	Keyword california	^	Add	
		^	Edit	
2	california	^		
2	california cmc 370	~	Edit	
2 1 1 1	california cmc 370 parking		Edit	

The keyword list includes a count of the number of times the keyword appears within the description text. Keywords do not have to appear in the text. Keywords that do not appear in the text have a zero match count in the keyword list. Existing keywords can be edited or deleted.

To highlight the keywords in the description text, select the *Highlight Keywords* check box. The keywords appear in bold.

## Find

To find text in a description, click the **Find** button.



Enter the text you want to find.

Find			×
Find What	Match Case	Direction	Down
	(	Find Next	Cancel

You can choose to match the case of the text and also choose to search up or down. Click **Find Next**. When you have finished, click **Cancel** to close the dialog box.

# **Find and Replace**

To find and replace text in a description, click the **Find and Replace** button.



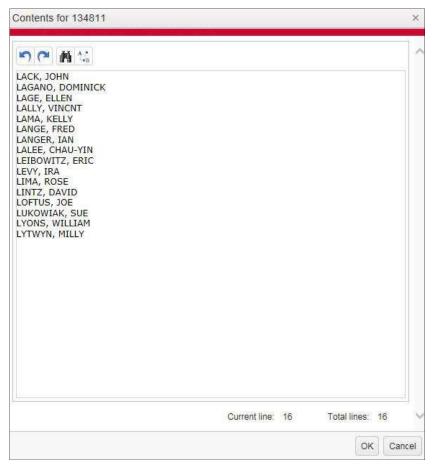
Enter the text you want to find and the text you want to replace it with. You can choose to match the case of the text.

Replace			×
Find What	[		
Replace With			
	Match Ca	se	
Find Next	Replace	Replace All	Cancel

Click **Find Next** to find the first matching text. Click **Replace** to replace it with the new text. You can also click **Replace All** to replace all instances of the text without reviewing them individually. When you have finished, click **Cancel** to close the dialog box.

# Contents

In the **Contents** dialog box you can enter the name of each item within another item. For example, you could list the name of each file stored in a container, or list the documents contained in a filefolder. To enter the contents, in the item's **Add** or **Edit** dialog box, click **Contents**.



The current line being edited and the total number of lines are displayed in the lower right corner. **Find** and **Find and Replace** buttons are available.

When you have finished, click **OK** to save the contents.

# Load From File/Save to File

In the **Search Inventory** grid, when you are in the Advanced Search mode, you have the option to load results from a file and save results to a file.

				Se	earch	Invent	tory		13	3 Requ	ests in Cart <b>\⊒∕≯</b>
Advanced Search 🔻								0- 0- 0- 0-		¢ ©	
Quick Query					Account	Item Code	Alternate Code	Destroy D	Contents Rang	Cor	Order
No FFs (Container) 🔹	1	Ť	-		1000	134529	169	12/31/2004		4	Bulk Items
Description	2	Y	1		1000	333659				- K	Materials
Container with no filefolders	3	¥	•	00	1000	200056	1	11/3/2006			Services
Clear All Items on Grid											Add Container Add Filefolder Add Tabe
Enter Level 1 Account:											Global Edit
1000											Container
Enter Level 2 Account:											Eilefolder Tape
Search Results											Options
Matched					4					•	Load From File
Added	H	-	1	).	(H)	100 •	items per page		1 - 3 of 3 items	Ċ	Save To File

## Load from File

You have the ability to load a list of items from an external text file.

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

From the Search Inventory grid, select Load from File.

Select files.	. Drop files her		
Item Type	Item	•	
Fields	Code	•	
Delimiter			
(e) Vertical Bar			

**Select Files**: Click to locate and select the file you want to load. You can also drag and drop a file. To delete the file, click the **X** next to the file name.

Select files	Drop files here Do	ne√	
SaveToFi	ile20190311_11	×	A

**Item Type**: Click the drop down arrow and select the type of item (container, filefolder, tape, item). When a specific type is selected, only that type is loaded from the file. For example, if you select Container, only containers in the file will be loaded. All other item types in the file will display as "item not found". If you select Item, all item types are loaded.

Fields: Click the drop down arrow to select the type of criteria used in your file.

Code Alternate Code Alternate Code + Account Base Object + Code

**Delimiter**: Select the delimiter type. This is what separates the fields of data in your file. This section is only available when you select Alternate Code + Account or Base Object + Code.

Click **OK** to load the file. The **Load From File** dialog box displays indicating if any errors occurred.

ompleted. Read: 11 Not Found: 0 Files Processed: 1 options Item Type: Item Fields: Code	tatus		
Not Found: 0 Files Processed: 1 Dotions Item Type: Item Fields: Code terms Not Found	completed.		
Files Processed:     1       Options     Item       Item Type:     Item       Fields:     Code         tems Not Found	Read:	11	
Options Item Type: Item Fields: Code Items Not Found Code Exception	Not Found:	0	
Fields: Code Items Not Found Code Exception	Files Processed:	1	
Fields: Code terms Not Found Code Exception	Options		
Items Not Found	Item Type:	Item	
	Fields:	Code	
	terns Not Found		
H C H 100 V Items per page No Items to display	0.1	E	
+ • • • 100 • Items per page No items to display	Code	Exception	*
items per page inditients to display	Code	Exception	*
			*

Click Close and the matched items are added to the Search Inventory grid.

#### Items Not Found

If any items in your file are not found in the database, they are displayed.

**NOTE**: No more than 1,000 items will be displayed in the grid.

ompleted Items n		
ay be downloaded	ot found are listed in the Table below. A list of these Items I.	0226
Read:	3	
Not Found:	3	
Files Processed:	Ť	
ptions		
Item Type:	Item	
Fields:	Code	
ems Not Found		
Code	Exception	
ALTCODE_Z	Record does not exist.	*
10045	Record does not exist.	
10086	Record does not exist.	
	▶ 100 ▼ items per page 1 - 3	v Fof 3 items
	1 tens per page	or or or terms

To save a file with the list of items that were not found, select the *Download Items not found on Close* check box. The text file format is compatible with Load From File so that you can edit it and upload it again using **Load From File**.

#### **Duplicates**

You are informed if your file includes any items with duplicate codes.

Status Completed, Resul	ts contain 4 It	ems which have duplicates.	
Read:		12	
Not Found:		0	
Files Processed		1	
Options			
Item Type:		Item	
Fields:		Code	
Items Not Found			
Code	Exceptio	n	
		100	
H 4 0	4	100 💌 items per page	- No items to display

Click **Close** and all items (including the duplicates) are loaded onto the grid.

# Save to File

Save to File lets you save items on the grid to a file that you can use again at a later time.

Load items onto the grid. Select **Save To File**.

Fields	Code		•
		OK	Cancel

Fields: Click the drop down arrow to select the type of criteria you want to use.

Code Alternate Code + Account Base Object + Code

Click **OK** to save the records to a file.

Export		×
Completed.		*
Records Exported:	11	*
		Close

Click **Close**. Select the folder where you want to save your file, and enter a file name.

lave As				<u>ε</u>
🔾 🗢 🚣 🕨 Co	mputer 🕨 Local Disk (C:) 🕨	<b>→ 4</b> 9	Search Local Disk (C:)	
File <u>n</u> ame:	SaveToFile_20190311_12_52_21.TXT			
Save as <u>t</u> ype:	Text Document (*.TXT)			
Browse Folders			Save Ca	ncel



## **Function Access**

The **Load From File** and **Save To File** links are only available if the following function access is set to Yes.

Feature	Permission	Access
Item	Load From File	Yes
Item	Save To File	Yes

# Save List/Load List

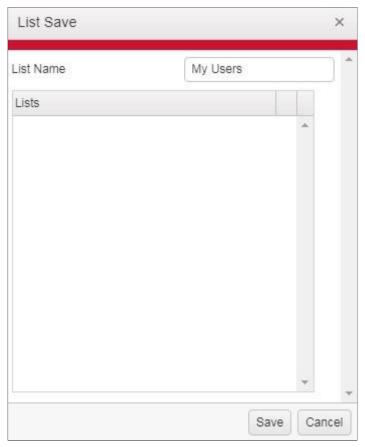
In the **Search Inventory** grid, you can save and load a list.

**NOTE**: The **Load List** and **Save List** links are only available when you are in the Advanced Search mode.

# Save List

This option is used to save a list of items that have been loaded onto a grid. You can then use the **Load List** menu option 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 **Options** menu, select **Save List**.



Enter a name for the list (maximum of 24 characters) and click **Save**. The list is saved and can now be used again. Click **Cancel** to return to the grid.

# Load List

Once a list of items has been saved, it can be loaded again. From the **Options** menu, select **Load List**.

ist Name	My Users			
Lists				
My Users		×	*	

Select the list you want to load and click **Load**. The list of items is loaded onto the grid.

To delete lists from this dialog box, click the X next to the list name.

# **Function Access**

The **Load List** and **Save List** links are only available if the following Function Access is set to Yes.

Feature	Permission	Access
Item	Load List	Yes
Item	Save List	Yes

# Order

# 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. Items remain in your cart until you remove them or until they are placed on an order. The cart can contain requests for deliveries, pickups, materials, or services.

**NOTE**: The cart only applies to the user logged in (with the exception of the Web User Administrator). 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 requests in the cart and provides quick navigation to the **Cart** grid.

# Add Requests to Cart

## **Containers, Filefolders, and Tapes**

Search for the item you want to order. Once it is loaded on the cart, select it and then click the **Add Item to Cart** icon to add it to the cart. You can also right click on the row and from the context menu, select **Add Item to Cart**.

							Sea	rch Inver		b			146 Reque	ests in Cart ∖ॖ⊒/ >	
				1	ype te	ext here to s	search inver	ntory			Search				
Search Filter	ar ti	ters										₹D	8= 8= ¥		
Inventory Type	-	~				Account	Barcode	Alternate Code	Short Description	Add Date	Stat	Status Date	Sequence B	Order	1
lear		1	1	Ж	•	3000	134730			2/15/2000	In	12/13/2010	~	Bulk Items Materials	
Container (13)			2	Ŵ	1	3000	134731			2/15/2000	In	12/13/2010		Services	
Specific Inventory Type	+		3	¥	1	3000	134732			2/15/2000	In	4/22/2000		Tasks	1
Specific Inventory Type Manua	+ 1		4	Ä		3000	134733			2/15/2000	In	4/22/2000		Add Container	
Item Status	+		5	¥	1	3000	134734			2/15/2000	In	12/13/2010		Add Filefolder Add Tape	
Account Code	+		6	W		3000	134735			2/15/2000	In	4/22/2000		Order Status	
Account Code Range	*		7	₩		3000	134736			2/15/2000	In	4/22/2000		Export Grid	ł
Add Date	+		8	¥	1	3000	134737			2/15/2000	In	4/22/2000		Print Grid	1

To add multiple items at once, select all the items and then click the **Add Selected Items to Cart** icon. You can also right click in the grid and from the context menu, select **Add Selected Items to Cart**.

						Soc	roh Invor	ton	b.			146 R	leque	ests in Cart <b>\</b> ∰/≯
			1	'ype te	ext here to s	Search inver		ntory clear searc	<u>n</u>	Search				
Search Filter	ar filters										Ē2	8- 8-	₩	
Inventory Type					Account	Barcode	Alternate Code	Short Description	Add Date	Stat	Status Date	Sequence	в	Order
clear		1	¥	•	3000	<u>134730</u>			2/15/2000	In	12/13/2010		~	Bulk Items Materials
Container (13)		2	Ŵ		3000	134731			2/15/2000	In	12/13/2010			Services
Specific Inventory Type	+	3	¥		3000	134732			2/15/2000	In	4/22/2000			Tasks
Specific Inventory Type Manual	+	4	₩	•	3000	134733			2/15/2000	In	4/22/2000			Add Container
Item Status	+	5	¥		3000	134734			2/15/2000	In	12/13/2010			Add Filefolder Add Tape
Account Code	+	6	₩	▣	3000	134735			2/15/2000	In	4/22/2000			Order Status
Account Code Range	+	7	¥	▣	3000	134736			2/15/2000	In	4/22/2000			Export Grid
Add Date	+	8	¥	च	3000	134737			2/15/2000	In	4/22/2000			Print Grid

To select or unselect all items in the grid, use the **Select All** or **Unselect All** icons. You can also right click in the grid and from the context menu, select **Select All**, or **Unselect All**.

						Sea	rch Inver		b			146 F	Reque	ests in Cart \ॖ⊒/ >
			l.	lype te	ext here to s	earch inver	ntory			Search	1	_		
Search Filter clear	itters										₹	9- D- 9- D-	斑	
Inventory Type -					Account	Barcode	Alternate Code	Short Description	Add Date	Stat	Status Date	Sequence	в	Order
clear		1	₩		3000	134730			2/15/2000	In	12/13/2010		~	Bulk Items Materials
Container (13)		2	¥		3000	134731			2/15/2000	In	12/13/2010			Services
Specific Inventory Type +		3	革		3000	134732			2/15/2000	In	4/22/2000			Tasks
Specific Inventory Type Manual +		4	Ä		3000	134733			2/15/2000	In	4/22/2000			Add Container
Item Status		5	¥	•	3000	134734			2/15/2000	In	12/13/2010			Add Filefolder Add Tape
Account Code		6	¥	団	3000	134735			2/15/2000	In	4/22/2000			Order Status
Account Code Range		7	¥	•	3000	134736			2/15/2000	In	4/22/2000			Export Grid
Add Date +		8	¥	F	3000	134737			2/15/2000	In	4/22/2000			Print Grid

## **Bulk Items**

This 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.

Click **Bulk Items** in the **Order** section on the right side of the screen.

Bulk Items			×
Service Type Container	Picku	p (Pickup the item(s) at my business.)	• ^
Quantity Comment	0	\$	$\sim$
Filefolder Quantity Comment	0	*	< >
Tape Quantity Comment	0	÷	< >
Total	D	Add to C	art Cancel

**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 when added to the cart.

**Comment**: 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 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.

Total: The total number of items displays at the bottom of the dialog box.

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.

Click the Materials link in the Order section on the right side of the screen.

Material	1 Cube (1 CUBE)	v	1
Quantity	<b>A</b>		
Requestor			
Cost Center			
Comment		~	
		~	

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.

Comment: 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.

#### 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.

Click the Services link in the Order section on the right side of the screen.

Add Service	To Cart			×
Service	Fax Per Page (FAX)		•	~
Quantity	\$			
Requestor				
Cost Center				
Comment			~	
	_		~	~
	Add to	Cart	Canc	el

Service: 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.

Comment: 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.

view the image in oneilOrder. Load your order onto the

# **View/Edit Requests**

You can edit some of the information for requests that are placed in the cart. In the cart, click the **Edit Request** icon next to the request. You can also right click on the row and from the context menu, select **Edit Request**.

	0 Ite	ems	in Search I	nventory		Cart				
									$\overline{\mathfrak{D}} \ \stackrel{\mathbb{B}^-}{=} \ \stackrel{\mathbb{B}^-}{=} \ \stackrel{\mathbb{B}^+}{\vee} \ \stackrel{\mathbb{B}^+}{\to} \ \stackrel{\mathbb{B}^+}$	
			Track #	Service Type	Detail	Quantity	Requestor	Cost Center	Customer Corr	Order
1	×	œ٩	482	Delivery	Container 964-TW	1				Bulk Items Materials
2	×	ø	483	Sell	1 Cube	1				Services
3	×	ø	484	Delivery	Container 543216	1				Tasks
1	×	ø	485	Sell	Barcode Labels	1000				Add Container
5	×	ø	496	Delivery	Container 543216	1				Add Filefolder Add Tape
	~	and	601	Dickson	Container 124500 (XXZ)		Carol			Order Stelles

Information regarding the request displays at the top of the screen. This information is read-only.

Cart Detail					×
Summary					
Tracking Number	48	1			
Ordered By	CA	ROL			
Add Date	8/2	7/2008 11:08 AM			
Service Type	De	livery			
Details	Co	ntainer 543216			
Quantity	1	A W			
Requestor					
Cost Center	(				
Comment			~		
			0		
			<u> </u>		
Return Date		Ē			~
				Apply	Cancel

Depending on the type of request you are editing, you may be able to edit the Quantity, Requestor, Cost Center, Comments and Return Date fields.

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

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

# Place a Web Order/Workorder

Once you have added requests to your cart, you are ready to check out. This is what actually sends your request to the record center.

When you check out a web order, the order goes to the record center and they create a workorder for you. When you check out a workorder, the workorder is created and sent to the record center.

Each request you add to the cart is given a tracking number. Once you create an order or workorder, a batch number is assigned to that group of requests. A batch can have one or a number of requests 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.

## **Check Out Web Order**

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

~	0 10		n Search I	monory		Cart			₹ <u>0</u> 8= 8= 1	e?	
			Track #	Service Type	Detail	Quantity	Requestor	Cost Center	Customer Con		Order
1	×	œł.	484	Delivery	Container 543216	1				~	Bulk Items Materials
2	×	đ	496	Delivery	Container 543216	1					Services
3	×	ø	501	Pickup	Container 134500 [XYZ]	1	Carol				Tasks
4	×	ø	505	Pickup	Container 134514 [140]	1	Carol				Add Container
5	×	eł	506	Pickup	Container 134515 [141]	1	Carol				Add Filefolder Add Tape
6	×	ø	507	Pickup	Container 134516 [142]	1	Carol				Order Status
7	×	ø	508	Pickup	Container 134517 [143]	1	Carol				Export Grid
8	×	ø	509	Pickup	Container 134518 [144]	1	Carol				Print Grid
9	×	œł.	511	Delivery	Filefolder 9654238	1					
0	x	e#	515	Deliverv	Container 134509 [135]	1			,	*	

Click	Check	Out.
-------	-------	------

Requests in this Account				
1000				
Address				
Contact	Ja	ne Hutter	Choose Address	
Address	12	34 Park Ave,	Use Default Deli	very Address
	Ne	w York, NY 11232		
Phone	21	2-555-3242		
Fax	21	2-555-3255		
Service Priority		3 HOUR		
Requested Fulfi	llment			
Notes		ſ		<u></u>

Enter your account number and your contact information. If you only have access to one account, the account field is populated and grayed out. 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. The **Address** grid is displayed with all available addresses for the account.

Optic	ons Search	Format		
20				
40	Account Code	Description	Contact	
1	1000	Default Mail Address	Jim Smith	
2	1000	Default Pick/Del Address	Jane Hutter	
3	1000	John's address	John Hutter	
4	1000	Legal Dept. Deliveries	Andrew Puzder	
5	1000\5000	Default Mail Address	Jim Smith	
6	1000\5000	Default Pick/Del Address	Jane Hutter	ſ
	<		>	

Right click on the address you want and select **OK**. The address fields are automatically populated.

Use the grid picker 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 or use the date/time picker to make your selection.

Add any 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.

When you have finished, click **Place Order**. The order is submitted and a Check Out summary is displayed.

Check Out		×
Completed.		~
Requests Ordered:	1	
Requests Not Ordered:	2	~
		Close

Click **Close** and an Order Confirmation is displayed.

11125278 Keg.       505     Pickup       Container 134514 [140]     1       Container 134514 (140) In on Sep 03, 2010.   Items successfully added to the order Track# Service Type Details       Qty       Requestor   Cost Center	pen In	New Tab	2							
Order Date:       Monday, October 03, 2016 10:31 AM         Service Priority:       3 HOUR         Requested Fulfillment Date/Time:       None         Batch Order Number:       322         Items Successfully Ordered:       1         Item: Rejected:       2         Items: Successfully Ordered:       1         Items: which could not be added to the order       2         Items: which could not be added to the order       2         Items: which could not be added to the order       1         Track# Service Type Details       Qty Reason         486       Delivery       Container 543216       1         Container 134514 (140)       1       Container 543216 Destroyed on Apr 13, 2016 WO#         505       Pickup       Container 134514 (140) in on Sep 03, 2010         Items: successfully added to the order       Track# Service Type Details       Qty Requestor Cost Center Return Date         501       Pickup       Container 134500 [XYZ]       1       Carol         Workorder Account:       Jane Hutter       1234 Park Ave.       New York, NY 11232         Phone: 212-555-3255       Note:       T       T         Notes:       T       T       T       T <th></th> <th></th> <th>Order Confi</th> <th>rmati</th> <th>on</th> <th></th> <th></th> <th></th> <th>^</th> <th></th>			Order Confi	rmati	on				^	
Service Priority: 3 HOUR Requested Fulfillment Date/Time: None Batch Order Number: 322 Item: Successfully Ordered: 1 Item: Rejected: 2 Item: which could not be added to the order Track# Service Type Details Qry Reason 486 Delivery Container 543216 1 Container 543216 Destroyed on Apr 13, 2016 WO# 11125278 Reg. 505 Pichap Container 134514 [140] 1 Container 134514 (140) In on Sep 03, 2010 Item: successfully added to the order Track# Service Type Details Qty Requestor Cost Center Return Date 501 Pichap Container 134500 [XYZ] 1 Carol Workorder Account: Jane Hutter 1234 Park Ave. New York, NY 11232 Phone: 212-555-3255 Note:			Ordered By:	CA	ROL					l
Requested Fulfillment Date/Time:       None         Batch Order Number:       322         Item: Successfully Ordered:       1         Item: Rejected:       2         Item: which could not be added to the order         Track# Service Type Details       Qty Reason         406       Delivery         Container 543216       1         Container 543216       1,2016 WO#         505       Pickup         Container 134514 (140)       1         More countser       1         Jane Hutter       1         1234 Park Ave.       New York, NY 11232         Phone:       12-555-3255         Note::       -			Order Date:	Mo	nday	Octo	ber 03, 2016	10:31 AM		l
Batch Order Number:     322       Item: Successfully Ordered:     1       Item: Rejected:     2   Inters: which could not be added to the order Inters: Service Type Details        Year     Qty Reason       496     Delivery       Container 134514     1       Container 134517     1102578 Reg.       505     Pickap       Container 134514     1400       Inters: successfully added to the order       Track# Service Type Details     Qty Requestor Cost Center Return Date       501     Pickap       Son Hutter     123278 Park Ave.       New York, NY 11232       Phone:     212-555-3255   Notes:			Service Priority:	3 H	OUF	-				l
Item: Successfully Ordered:       1         Item: Rejected:       2         Item: which could not be added to the order         Track# Service Type Details       Qty Reason         496       Delivery       Container 543216       1       Container 543216 Destroyed on Apr 13, 2016 WO#         505       Pickup       Container 134514 [140]       1       Container 134514 (140) In on Sep 03, 2010         Items successfully added to the order       Track# Service Type Details       Qty Requestor Cost Center Return Date         501       Pickup       Container 134500 [XYZ]       1       Carol         Workorder Account:       Jane Hutter       1234 Park Ave.       New York, NY 11232         Phone: 212-555-3255       Notes:			Requested Fulfillment Date/Time:	No	1e					l
Item: Rejected:     2       Income: which could not be added to the order       Track# Service Type Details     Qty Reason       496     Delivery     Container 543216     1       505     Pickup     Container 134514 [140]     1       Container 134514 [140]     1     Container 134514 (140) In on Sep 03, 2010   Items successfully added to the order Track# Service Type Details        Qty     Requestor     Cost Center       S01     Pickup     Container 134500 [XYZ]     1       Carol   Workorder Account: Iane Hutter 1234 Park Ave. New York, NY 11232 Phone: 212-555-3255 Notee:			Batch Order Number:	322					E	1
Item: which could not be added to the order Track# Service Type Details Qty Reason 496 Delivery Container 543216 1 Container 543216 Destroyed on Apr 13, 2016 WO# 11125278 Reg. 505 Pickup Container 134514 [140] 1 Container 134514 (140) In on Sep 03, 2010 Items successfully added to the order Track# Service Type Details Qty Requestor Cost Center Return Date 501 Pickup Container 134500 [XYZ] 1 Carol Workorder Account: Jane Hutter 1234 Park Ave. New York, NY 11232 Phone: 212-555-3242 Fax: 212-555-3245 Notes:			Items Successfully Ordered:	15					1.00	1
Track# Service Type Details       Qty Reason         496       Delivery       Container 543216       1         505       Pickup       Container 134514 [140]       1       Container 134514 (140) In on Sep 03, 2010.         Items successfully added to the order         Track# Service Type Details       Qty Requestor Cost Center Return Date         501       Pickup       Container 134510 [XYZ]       1       Carol         Workorder Account:         Jane Hutter       1234 Park Ave.         New York, NY 11232       Phone: 212-555-3255       Notes:			Items Rejected:	2						l
496     Delivery     Container 543216     1     Container 543216     1     11125278 Reg.       505     Pickup     Container 134514 [140]     1     Container 134514 (140) In on Sep 03, 2010.       Items successfully added to the order       Track# Service Type Details     Qty Requestor Cost Center Return Date       501     Pickup     Container 134500 [XYZ]     1     Carol       Workorder Account:       Jane Hutter       1234 Park Ave.     New York, NY 11232       Phone: 212-555-3255     Notes:     -	Items	which could i	not be added to the order						- 22	l
Sof       Delivery       Container 345110       1       11125278 Req.         Sof       Pickup       Container 134514 (140)       1       Container 134514 (140) In on Sep 03, 2010         Items successfully added to the order       Track# Service Type Details       Qty Requestor Cost Center Return Date         501       Pickup       Container 134500 [XYZ]       1       Carol         Workorder Account:       Jane Hutter       1234 Park Ave.       New York, NY 11232         Phone: 212-555-3242       Fax: 212-555-3255       Notes:       T	Track	# Service T	ype Details	Q	ty I	leason	n			l
505       Pickup       Container 134514 (140)       1       Container 134514 (140)       In on Sep 03, 2010         Items successfully added to the order         Track# Service Type Details       Qty Requestor Cost Center Return Date         501       Pickup       Container 134500 [XYZ]       1       Carol         Workorder Account:         Jane Hutter       1234 Park Ave.         New York, NY       11232       Phone: 212-555-3242         Fax: 212-555-3255       Notes:       T	496	Delivery	Container 543216	1				royed on Apr 13, 2016 WO#		l
Track# Service Type Details     Qty Requestor Cost Center Return Date       501     Pickup     Container 134500 [XYZ]     1     Carol       Workorder Account:     Jane Hutter     1234 Park Ave.       New York, NY 11232     Phone: 212-555-3242       Fax: 212-555-3255       Note::	505	Pickap	Container 134514 [140]	1				In on Sep 03, 2010.		l
Track# Service Type Details     Qty Requestor Cost Center Return Date       501     Pickup     Container 134500 [XYZ]     1     Carol       Workorder Account:     Jane Hutter     1234 Park Ave.       New York, NY 11232     Phone: 212-555-3242       Fax: 212-555-3255       Note::	Items	successfully o	added to the order						-	211
Workorder Account: Jane Hutter 1234 Park Ave. New York, NY 11232 Phone: 212-555-3242 Fax: 212-555-3255 Note::				Qty R	eque	stor	Cost Center	Return Date		
Jane Hutter 1234 Park Ave. New York, NY 11232 Phone: 212-555-3255 Note::	501									
	Jai 12 Ne Ph Fa	ne Hutter 34 Park Ave. ew York, NY ione: 212-555 ix: 212-555-3	11232							
	1. otes	5) 								

Click **Open In New Tab** to view the confirmation in a full screen. Click **OK** to close the summary and return to the cart.

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

## **Check Out Workorder**

Select the items in the cart that you want included the same as you would for a web order.

							ā 🗄 🗄	E V. ©	
			Track#	Service Type	Details	Quan	Requestor	Cost Ce	Order
41	×	ø	789	Delivery	Container 134507 [152]	1			Bulk Items
42	×	ø	790	Delivery	Container 134601 [AU-201]	1			Materials
143	×	ø	791	Delivery	Container 134602 [AU-202]	1			Services
144	×	ø	792	Delivery	Container 134603 [AU-203]	1			Inventory
145	×	E.	793	Delivery	Container 134604 [AU-204]	1			Add Container
146	×	ø	794	Delivery	Container 134606 [AU-206]	1			Add Filefolder
147	×	III.	795	Delivery	Container 134607 [AU-207]	1			Add Tape
148	×	ø	796	Delivery	Container 134609 [AU-209]	1			State State
149	×	E.	797	Delivery	Container 134611 [AU-211]	1			Options
150	×	ø	800	Pickup	Container 134500 [XYZ]	1	Carol	310	Export Grid Print Grid
151	×	ø	801	Pickup	Container 134501 [XYY]	1	Carol	310 👻	Order Status
			.e)		-			•	
16	2		P H	100 🗸	items per page		101 - 151 of 151	items 🔿	Order Approvals

Click the Check Out Workorder button.

1000				
Address		Service Priority	3 HOUR	Ē
Contact	Jane Hutter	Requested Fulfillment		 E ©
Address	4980 Barranca Pkwy	Authorization (optional)		
	Irvine, CA 92604	First Name	1	
		Last Name		
Phone	212-555-3242	Password		
Fax	212-555-3255			
	Choose Address			
	Use Default Delivery Address			

Make any necessary changes and click the **Place Workorder** button. The workorder is submitted and a **Check Out** summary is displayed.

Check Out		×
Completed.		*
Requests Ordered:	2	
Requests Not Ordered:	0	~
		Close

Click **Close** and a Workorder Confirmation is displayed.

Workord
11125318
11125318

Click **OK** to close the summary and return to the cart.

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

# **Remove Requests from Cart**

Requests can be removed from the cart without adding them to an order.

## **Remove Current Row**

To remove only one request from the cart, click the  $\mathbf{X}$  for that row.

	0 It	ems i	in Searcl	n Inventory		Cart				
									⑦ 〓 〓 ☆	
			Track #	Service Type	Detail 🔺	Quantity	Requestor	Cost Center	Customer Comme	Order
1	×	E!	776	Sell	1 Cube	5			~	Bulk Items Materials
2	×	ø	477	Sell	2 Cube	25	Carol			Services
3	×		563	Pickup	Container	2				Tasks
4	×	ø	767	Pickup	Container	2				Add Container
5	×	œ?	700	Pickup	Container	4				Add Filefolder Add Tape
6	×	and a	702	Rickup	Container	1				Order Status

## **Remove Selected Rows**

To remove several requests from the cart at once, select the requests you want to remove. To select all requests in the cart, click the **Select All** icon.

					Cart			₹ <b>2</b> 目目 1/2	2	
		Track #	Service Type	Detail 🔺	Quantity	Requestor	Cost Center	Customer Comme		Order
1 X	: 1	776	Sell	1 Cube	5				~	Bulk Items Materials
2 X	:	477	Sell	2 Cube	25	Carol				Services
з 🗙	: 1	563	Pickup	Container	2					Tasks
4 X	: 1	767	Pickup	Container	2					Add Container Add Filefolder

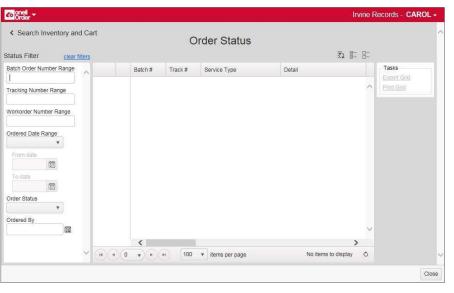
Once the requests are selected, click the **Delete Selected Requests** button.

	Olt	ems	in Search	n Inventory		Cart				
									ᡚ #= E \¥	
			Track #	Service Type	Detail 🔺	Quantity	Requestor	Cost Center	Customer Comme	Order
1	×	ø	776	Sell	1 Cube	5			^	Bulk Items Materials
2	×	ø	477	Sell	2 Cube	25	Carol			Services
3	×	ø	563	Pickup	Container	2				Tasks
4	×	ø	767	Pickup	Container	2				Add Container
5	×	ø	700	Pickup	Container	4				Add Filefolder Add Tape
6	~	mil	702	Pickup	Container	4				Order Status

All selected requests in the cart are removed. Requests that were not selected remain in the cart.

# **Order Status**

Once you have placed an order through oneilOrder, you can track its status as it is fulfilled by the record center.



**NOTE**: If the user logged in is a Web User Admin with permission to modify the cart, the **Order Status** grid will also display the Ordered By, Placed In Cart By, and Placed In Cart Date Time columns.

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.

# Search by Batch Number Range

When you submit an order through oneilOrder, 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.

```
Batch Order Number Range
132, 134, 140-145
```

**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.

## Search 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.

# Search 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.

# Search by Ordered Date Range

To check the status of orders placed during a specific time period, use the Ordered Date Range fields. To include an Ordered Date in your search, click the drop down arrow in the top field.

Select from the available options.

Any Date
Last 7 days
Yesterday
Today
Tomorrow
Next 7 days
Between

If you select Between, you will need to enter a From/To date. Type in a date, or click the grid picker next to the field to select a date. You can select just a From date or just a To date. It is not necessary to enter both.

		М	ay 20	16		
Su	Мо	Tu	We	Th	Fr	Sa
24	25	26	27	28	29	30
			4			
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	3	2	3	4
	Thu	rsday	, May	12, 2	016	

# Search by Order Status

To search for orders by their status, click the down arrow next to the Order Status 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.

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.

# Search by Ordered By

To check the status of orders placed by a specific user, use the Ordered By field. Click the grid picker to select the user you want. If you are a Web User Administrator, your name and the names of all users that have been assigned to you appear in the list. If you are not a Web User Administrator, only your name appears.

Optio	ns Search	Format		
	2			
	User Code	Last Name	First Name	
1	CAROL	Morris	Carol	
2	JOHN	Dunn	John	
3	MARY	Andrews	Mary	1
4	JESS	Wagner	Jess	
	<			>

# **Search Results**

As you complete each filter field, the **Order Status** grid is populated with the orders that meet your search criteria.

Search Inventory an Status Filter <u>clear f</u>						Orde	er Status		1	5 2= 8=	
Batch Order Number Range	~			Batch #	Track #	Service Type	Detail	Quantity	Status	Status [	Tasks
	e	1	B	307	759	Pickup	Container 438318	1.00	Submitted	3/1/2011	Export Grid Print Grid
Tracking Number Range		2		307	760	Pickup	Container 438316	1.00	Submitted	3/1/201	1
Workorder Number Range		3	圓	308	761	Pickup	Container 438318	1.00	Submitted	3/1/2010	
		4	00	308	762	Pickup	Container 438316	1.00	Submitted	3/1/201	
Ordered Date Range		5	8	309	763	Pickup	Container 438318	1.00	Submitted	3/1/201	
Between *		6		309	764	Pickup	Container 438316	1.00	Submitted	3/1/201	
3/1/2016											
To date											
3/4/2016											
Order Status											
Ψ											
Ordered By JESS											
1200											
										$\sim$	
				<		1				>	

To view more information about any order, click the **View Order Status** icon.

		Batch #	Track #	Service Type	Detail	Quantity	Status	Status I
1		307	759	Pickup	Container 438318	1.00	Submitted	3/1/201
2		307	760	Pickup	Container 438316	1.00	Submitted	3/1/201
3		308	761	Pickup	Container 438318	1.00	Submitted	3/1/201
4		308	762	Pickup	Container 438316	1.00	Submitted	3/1/201
5		309	763	Pickup	Container 438318	1.00	Submitted	3/1/201
6	囱	309	764	Pickup	Container 438316	1.00	Submitted	3/1/201

The **Order Detail** dialog box appears.

Order Summary						
Batch Number 307	Ordered by	JESS	at	3/1/2016 12:56 PM		
Fracking Number 760	Placed in Car	t by JESS	at	3/1/2016 12:56 PM		
Service Type Pickup	Status	Subm	itted at	3/1/2016 12:56 PM		
Requested Fulfillment	Workorder Ad	count 1001				
Order Detail						
Request		Delivery Address				
Detail Container 438316		Contact Andrew Gilbert Address 200 Jefferson St.				
Quantity 1						
Requestor						
Cost Center		Irvine, CA Phone 949-555-1313				
Comment						
	^	Fax				
	¥.					
Return Date						
lotes		Record Cente	er Comment			
	~				~	
	~				× .	

Click **Close** to return to the **Order Status** grid.

# Index

#### Α

Account Access 26 Edit 26 Function Access 27 Global Edit 27 Account code 38 Account code range 38 Add Container 45 Filefolder 47 Tape 49 Add date 38 Add item to cart 71 Add User 17 Advanced Search 43 Alert Layout 19 Alerts Order Approvals 99 Order Rejections 99 Approval Require 89 Approve Order Detail 94 Approve Order 91

#### В

Border 15 Browser compatibility 1 Bulk Items 72

#### С

Cart 71 Add Bulk Items 72 Add items 71 Add Materials 74 Add Services 74 Edit 77 Remove Requests 83 Cart Access 28 Change password 3 Check out 79 Check Out Workorder 81 Clear filters 42 Clone User Information 20 Column detail font 14 Column Format 6 Column heading font 14 Columns Move 6 Sort 5 Columns searched 32 Comment 73 Container Add 45 Edit 46 Contents 61 Context menu 7 Create Order 78

#### D

Date picker 10 Keyboard shortcuts 11 Date/time picker 11 Description 58 Destroy date 39 Dialog boxes 8

#### Е

Edit Cart 77 Container 46 Filefolder 49 Tape 51 Errors 11 Export Grids 12

#### F

Filefolder Add 47 Edit 49 Filtered Search 32 Find 60 Find and replace 61 Font Column detail 14 Column heading 14 From/to date 42 Function Access 24 Edit 25 Global Edit 26 Load From File 67 Load List 69 Order Approval 98 Save List 69 Save To File 67

#### G

Google Authenticator 2 Grid Export 12 Print 14 Grid picker 9 Grids 4

#### I

Icons 8 Image 52 Delete 58 Purged 57 View 52 Imaging Request 75 Inventory 31 Search 31 Inventory type 35 Item Activity View 51 Item status 37

#### Κ

Keywords 59

#### L

Landscape 14 List Function Access 30 Load 29, 68 Save 29, 68 Load From File 63 Load List 29, 68 Locked out User 20 Log In 1 Logout 4

#### Μ

Margins 13, 14 Materials Add to Cart 74 MFA 2 Resync 2 Model User 19, 23 Move column 6 Multi-factor authentication 1

#### 0

Order Approve 91 Create 78 Edit 93 Reject 96 Order Approval Function Access 98 Order confirmation 81 Order status 84 Output format 15

#### Ρ

Page settings 14 Paper size 14 Password 3 PDF View 56 Perm flag 42 Portrait 14 Print grid 14

#### Q

Quick Query Advanced Search 43

#### R

Reject Order 96 Rejected Orders 97 Remove All Rows 83 Remove Current Row 83 Remove From Cart 83 Require Approval 89 Restricted Search 44 Result limit exceeded 42 Resync MFA 2

#### S

Save List 29, 68 Save to File 66 Search Advanced 43 Batch Number Range 85 Date Range 85 Filtered 32 Ordered by 87 Quick Query 43 Restricted 44 Status 86 Tracking Number Range 85 Workorder Number Range 85 Search field 32 Search filters 34

Account code 38 Account code range 38 Add date 38 Clear 42 Destroy date 39 From/to date 42 Inventory type 35 Item Status 37 Perm flag 42 Sequence range 42 Specific inventory type 35 Specific inventory type manual 35 Status date 41 Search Inventory 31 Search Results 87 Searches Not supported 33 Supported 33 Sequence range 42 Services Add to Cart 74 Shade alternate rows 15 Sort columns 5 Sort Format 6 Specific inventory type 35 Specific Inventory Type Manual 35 Status date 41 Supported searches 33

#### т

Tape Add 49 Edit 51 TIFF View 56 Time Out 4

#### U

User Account Access 26 Add 17 Delete 22 Edit 21 Function Access 24 User Admin 17 Users Global Edit 22

#### ۷

View TIFF 56 View details 77 View Image 52 Keyboard Shortcuts 55 View Item Activity 51 View PDF 56

#### W

Warnings 11 Web Order Approval 89 Web Order Requires Approval 19