RS-Web™

Client User Guide

O'Neil Software, Inc.

O∩EIL™

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RS-Web™ Overview

Overview

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

Logging In

Security is important to you and your records. RS-Web respects that and requires that everyone who logs in have a current User Name and Password. These names and passwords are set up through your record center. Enter your User Name and Password in the appropriate fields, and click the **Login** button at the RS-Web opening screen (shown above). The following screen appears.
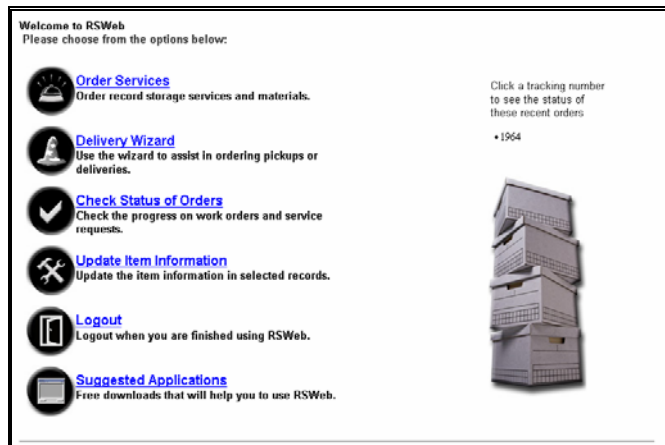
This is the main screen of RS-Web. From here you can complete all of your communications with the record center.

Order Services

Any time you need to get something from the record center or have something taken to the record center, you can order the appropriate service here. Schedule services for specific items (Specific Services), schedule pick ups of new items (Aggregate Services), order supplies (Material Services), order reports (Report Services), or other services (copying, faxing, etc.).

Delivery Wizard

This is a quick and easy way to order a pick up or delivery. Very little information about the item(s) is required.

Check Status of Orders
Once an order has been placed, you can check its status through this option. This is also where you access Web reports.

Update Item Information
Data Entry couldn't be easier when done through RS-Web. Through this option, you can enter all the important information about your stored items.

Logout
This allows you to log out of RS-Web when you are finished.

Suggested Applications
As you know, Web applications are built to work with other applications. RS-Web works best with Internet Explorer. To download the most current version of Internet Explorer, just click this option.

Quick Reference for Tracking Numbers
On the top right of the screen is a scrolling list of the most recent tracking numbers. The list contains up to the last 20 orders that were placed over the last three days for the user currently logged in. To select a tracking number to view, simply click it as it scrolls by.

Time Out Feature
RS-Web has a built-in time out feature. A timer displays at the bottom of each page to reflect the approximate time before the session will timeout if no activity occurs. The timer counts down in 15-second intervals. When the timer reaches zero, the text will change to "Session has timed out. Please log in again." You will be required to log in again in order to continue working.

Delivery Wizard

If you just want the record center to send a truck to your facility to deliver or pick up items, the Delivery Wizard is a good place to go. It leads you right through the ordering process for a pick up or a delivery.

Note: At any point in the Wizard process, you can either cancel the order by clicking the **Cancel Transaction** button or move back a step by clicking **Back**.

To open the Delivery Wizard, click the icon that shows a wizard's hat. The following screen appears.

Step 1

The record center identifies your company, your department and your cost center with Level 1, Level 2, and Level 3 Account Codes. If you know what your account codes are, enter them in the fields in this

screen. If you don't, it's okay, you can tell the record center later on. Whether you enter anything or not, click **Next**.

Step 2

Delivery Wizard: Step 2   Ordered By: webbie

Please choose the type of transaction, then click Next:

⦿ Deliver an item to me.

○ Pick up items from me.

○ I'll describe the type of service that I want.

[Cancel Transaction]   [<< Back]   [Next >>]

Here you just tell the record center what service you want – Pick up or Deliver. If you want the record center to deliver something and pick up something else, place each order separately. They will be batched together, but will remain in the system as separate orders. Click **Next**.

Deliver an item to me

If you chose this option, in Step 3 you are asked if you want a container, a filefolder, or a tape.

Delivery Wizard: Step 3   Ordered By: webbie

Please choose the type of item to deliver, then click next:

⦿ Container

○ File Folder

○ Tape

[Cancel Transaction]   [<< Back]   [Next >>]

Choose one, then click **Next**. The following screen appears.

This step will allow you to specify which item to deliver. You may choose one of the following options:

1. Specify the barcode ID of the item (Record center's identifier)

2. Specify the Alternate ID and the item's Account for the item (Your identifier)

Alternate ID: Item Account Level 1:

Item Account Level 2:

Item Account Level 3:

3. Describe the item:

Cancel Transaction   << Back   Next >>

If you know the number of the barcode that is attached to the item you want, enter it in the first field. (Remember to enter any leading zeroes.) If you don't, leave the field blank and continue to section two.

If you know your own internal identifier for the item, enter it in the **Alternate ID** field. When you enter an Alternate ID, you must also enter the Account Codes for the account that owns the item you want. These codes are created by the record center to identify the company, department, and cost center that owns an item. If you don't know all this information, you can enter part of it (or none at all), then continue on to section three where you can describe the item.

If you need to describe the item, please give as much information as you can, including a description, the contents, date ranges, or anything else associated with it. The record center will contact you if necessary. Click **Next** to move to the Final Step (see *Final Step* section).

Pick up items from me

To have the record center come pick up items for storage, click this option at Step 2 and click **Next**. You are asked if you want them to pick up Containers, Filefolders or Tapes. Click one, and then enter the number of Containers, Filefolders, or Tapes that you want them to pick up. If you have more than one type of

item, complete the steps for the first item (say, containers), then once that order has been submitted, you can come back and complete the same steps for the other item(s).

I'll describe the type of service that I want

If you want the record center to do something other than pick up or deliver containers, filefolders or tapes, click this option at Step 2. When you click **Next**, you are offered a free text screen where you can type in a description of what you want. If the record center has questions, someone will contact you. When you are finished, click **Next**.

Final Step

Once you have filled out all the information above, you are shown the screen below. The address that appears (if one does) is either the default address in the system for the item that you requested, or the default address associated with the account levels you entered. Confirm that this is the correct contact name and phone number and that this is the address where you would like the record center to come. You may edit any of the fields if necessary.

The time that the order is scheduled to take place defaults to the following day at noon. Change the date and time if necessary.

Delivery Wizard: Final Step **Ordered By: webbie**

You may specify contact information or override the default contact information provided below. All of these fields are optional:

Contact's Name:
Jane Hutter

Address 1:
1234 Park Ave.

Contact's Phone:
212-555-3242

Address 2:
New York, NY 11232

Contact's Fax:
212-555-3255

Address 3:

If you would like to specify a delivery time, enter it here

2002 / Nov / 13 12 : 00 PM

If you would like to specify additional comments for the records center, enter them here (80 chars max)

Cancel Transaction   << Back   Next >>

If there is any information or a message you would like to give to the record center, enter it in the free text box at the bottom of this screen.

When the screen is completed to your satisfaction, click **Next**.

Optional Feature

If your record center is using the Item Verification feature, and the item you requested is not available for the order, you receive a message similar to the one below.

Delivery Wizard: Confirmation **Ordered By: webbie**

The item you ordered is not available for this type of order at this time. Reason:

Container 134517 (143) Out on Nov 12, 2002 WO# 00000111 Req: Bill Smith

Back

The message tells you why the item is not available for your order. You can click **Back** and return to the order process.

If there was no problem with the item you ordered, or if your record center is not using Item Verification, an order

confirmation appears, with all the information for your order listed.

Confirm that the information is correct, and click **Add Order to Batch**. At this point, the order is sent to the record center. Once it has been sent, the following screen appears telling you that your order has been accepted.

Order and Tracking Numbers

Each time you place an order, it is assigned a tracking number. This number identifies the individual order you just placed. Each order is assigned to a batch. Each batch can have any number of orders associated with it. A batch is simply a way of grouping a set of orders for inquiry and management purposes.

Once your order has been submitted, you can add another order to this batch, view all the orders that are associated with the current batch, start a new batch, or exit the Delivery Wizard by clicking the associated button.

.

Order Services

Placing Orders

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

Specific Services

Specific Services includes Deliveries, Pick ups, Accesses, Receives, as well as Destruction orders of specific items. To place an order here, you need to know either the barcode number that is associated with the item(s) you want, or your own internal identifier (provided

the record center's database has that identifier as well). You can choose from the following services:

Deliver (Bring the item to me.)

Permout Deliver (Bring the item to me. I will not return it.)

Access (I will access/pick up the item at the record center.)

Permout Access (I will pick up the item. I will not return it.)

Pickup (Pick up the item at my business.)

Receive (I will bring the item to the record center.)

Destroy (Permanently destroy this item for me.)

Creating a Delivery Order

Creating an order is a simple process. Let's use an example to familiarize ourselves with the fields. Let's say you want a couple of your boxes that are in the record center delivered to your office. When you click **Specific Services**, the screen below appears. In the **Service Type** field, the default is Deliver (Bring the item to me). Since we want our boxes delivered, we select this option.

Tab to the **Item Type** field. The Item Type field tells the record center what type of item you want delivered. Your choices are Container, Filefolder and Tape. Since we want boxes, select **Container**.

Next, fill in either the Item Code or the Item Alt Code and Item Account Code. It is not necessary to fill in both sections. Let's start with the **Item Code** field. The Item Code is the barcode number that is attached to the box. The record center uses a laser scanner to scan that barcode every time the box is moved, so their RS-SQL software can always identify and locate it. Type in the Item Code.

If you will be entering several Item Codes, you may want to use the **Search** feature, which allows you to find the items you want and then enters them in the field for you. Detailed information on this feature is available under the Search heading at the end of this section.

If you are not using the search feature and you do not know the Item Code, you can use the **Item Alt Code** and **Item Account Code** fields instead. The **Item Alt Code** is also called the Alternate ID or Customer ID. This is the identifier that you gave the container for your own identification. If the Alternate Code has been entered into the record center's software, the software can use it, along with your account information to identify the container. You only need to enter the Item Alt Code if you didn't enter an Item Code.

Tab to the **Item Account Code** field. RS-Web and the RS-SQL program that your record center uses, identify accounts in three levels. The Level 1 Account refers to your company. For our example, we'll say your Level 1 Account Code is 1000. The Level 2 Account Code usually refers to a department within your company. For our example, we'll say that the container you are looking for belongs to the Accounting Department, whose account number is 1500. Then within departments, RS-Web can identify cost centers with the Level 3 Account Code. Our example box comes from Payroll whose Level 3 Account Code is 500. Therefore, we will enter the Item Account Code as 1000\1500\500. Use backslashes (\) to separate the account levels, not forward slashes (/).

Notice the small box to the right of the Item Account Code. This box is only used if you don't know the Item Code or the Item Alt Code. If this is the case, click in this

box and enter a description of the container in the Item Description box at the bottom of the screen.

Tab to the **Requested By** field, and enter your own name or the name of the person requesting the container.

Tab to **Order Account Code**. This field refers to the account that will be billed for the service being ordered. In our example, let's say that the Hiring Manager in the Human Resources department is ordering the container. His three-level account code is 1000\2000\220. If this field is left blank, the system assumes that the same account that owns the container will be billed for the delivery. The record center can override the Order Account Code. In fact, the record center may request that this information always be left blank.

Tab to the **Cost Center** field. If you want to reference a specific internal cost center on the workorder, enter it here.

Tab to the **Item Description** field. If you would like to add a description of the container, do so here.

Click **Next** to continue to the next screen.

The top of this dialog displays the contact and delivery address information that the system has for the container you requested. You may edit it if necessary.

The second section of the dialog allows you to enter the date and time that you want the delivery to take place. The default date and time is tomorrow at noon. Change the delivery time information if necessary.

If you would like to include additional comments for the record center, enter them in the text box at the bottom of the dialog. Remember that there are only 80 characters allowed.

When all the information has been entered and confirmed for your order, click the **Add Order to Batch** button. This sends your order to the record center.

Optional Feature

If the Item Verification feature is being used by your record center and the item you requested is not available for order, you receive a message similar to the one below.

The item you ordered is not available for this type of order at this time. Reason:

Container 134517 (143) Out on Nov 12, 2002 WO#00000111 Req: Bill Smith

Back

If the item does not exist or if you do not have access to that item, you receive a message similar to the one below.

The item you ordered is not available for this type of order at this time. Reason:

Item does not exist. Item Code: 134000

Back

If your record center is not using the Item Verification feature, or if there was no problem with the item you ordered, a confirmation similar to the one below appears:

Batch Order# 42			Tracking# 575			
Status > Submitted			Status Updated: 2001, Aug 9, 03:59 PM			
Ordered By:	Account	Scheduled For		Action		Item
webbie		2001, Aug 10, 12:00 PM		Deliver		Container
Item Code(s)	Alt Code	Account Code			Requester	Cost Center
000056						
Item Description						
Customer Comment						

Add more orders to this batch

View all orders in the current batch

Start a new batch

Back to main menu

Each order you place is given a tracking number. It is listed at the top right of the **Confirmation** screen. Each order is also assigned to a batch. A batch can have one or a number of orders 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.

All information regarding your order is listed on the top half of the **Confirmation** dialog. At the bottom you are given several options:

Add more orders to this batch: Clicking this option takes you back to the first Specific Services dialog. The current batch number appears at the top.

View all orders in the current batch: Clicking this option gives you a screen with all the orders in the current batch. From that screen you can view all the orders associated with this batch, as well as add more orders to the batch and exit.

Start a new batch: When you choose this option you are returned to the first Specific Services dialog.

Search

As mentioned previously, if you will be adding several items to your order, you may want to use the Search feature. Using Search you can specify your criteria, view the results of your search, and determine which items to post to your order. To conduct a search, click the word

Search above the **Item Code** field. The following **Query and Post Items to Order** screen appears.

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

In the Item Details section, you can define the criteria for your search. Click the down arrow next to the Field and Operator fields to view all available options. Additional fields become available depending on the Field and Operator selected.

The **Display Fields** section allows you to indicate which fields you want to appear on the table. All items that are checked (✓) appear on the table.

After you have entered all the information, click **Submit Query**. RS-Web accesses the RS-SQL database and conducts your search. A screen similar to the following appears.

	Item Code	Account	Status	Status Date	Alt Code	Add Date	Destroy Date	Details
	134502	1000	In	2002, Oct 15	147	2000, Apr 21	2001, Aug 14	Details
	134503	1000	In	2002, Oct 15	148	2000, Apr 21	2001, Aug 14	Details
	134517	1000	Out	2002, Nov 12	143	2000, Apr 23	2003, Dec 31	Details
	134519	1000	Perm Out	2002, Oct 15	170	2000, Apr 23	2004, Dec 31	Details
	134520	1000	Out	2002, Oct 25	160	2000, Apr 23	2003, Dec 31	Details

If you find that you did not get all the search results you were looking for, click the **Click here to add more results to this resultset** button to return to the **Query and Post** screen.

There is now an **Append Results** check box available. It is selected by default. Once you define your new query, all new results will be added to the existing results. If the check box is not selected, the existing results will be cleared and only results of the new query will display in the results table.

All items on the results table are selected by default.

Item Code	Account	Status	Status Date	Alt Code	Add Date	Destroy Date	Details
134502	1000	In	2002, Oct 15	147	2000, Apr 21	2001, Aug 14	Details
134503	1000	In	2002, Oct 15	148	2000, Apr 21	2001, Aug 14	Details
134517	1000	Out	2002, Nov 12	143	2000, Apr 23	2003, Nov 31	Details
134519	1000	Perm Out	2002, Oct 15	170	2000, Apr 23	2004, Dec 31	Details
134520	1000	Out	2002, Oct 25	160	2000, Apr 23	2003, Dec 31	Details
134522	1000	Perm Out	2002, Oct 15	163	2000, Apr 23	2004, Dec 31	Details

Query and Post Items to Order - 6 results — *User: webbie*

6 Items Selected for Posting

Post Items   Click here to add more results to this resultset   Close

A status bar at the bottom of the grid indicates how many items have been selected for posting. Deselect any items you do not want to include on the order, and then click **Post Items**.

The items appear in the **Item Code** field on the **Order Services** screen, and you are ready to continue placing the order as previously described.

Optional Feature

If your record center is using the optional Item Verification feature and there is a problem with any of the items on your order, you will receive a message similar to the one below when you submit the order.

Batch Order #29		Tracking #95			
Status > Submitted		Status Updated: 2002, Nov 12, 10:22 AM			
Ordered By:	Account	Scheduled For		Action	Item
webbie		2002, Nov 13, 12:00 PM		Deliver	Container
Item Code(s)	Alt Code	Account Code		Requested By	Cost Center
List					

Item Description

Customer Comment

Errors with your order

Container 134517 (143) Out on Nov 12, 2002 WO# 00000111 Req: Bill Smith
Container 134519 (170) Perm Out on Oct 15, 2002 WO# 00000106 Req: Carol
Container 134520 (160) Out on Oct 25, 2002 WO# 00000108 Req:
Container 134522 (163) Perm Out on Oct 15, 2002 WO# 00000103 Req:

Add more orders to this batch
View all orders in the current batch
Start a new batch
Back to the main menu

The error section displays items that were not submitted with your order and gives you the reason why. You can click the **List** link to see a list of items that were submitted with your order.

Aggregate Services

Use the Aggregate Services feature when you have containers, filefolders or tapes that need to go to storage, but they either don't have barcode numbers (yet) or you don't want to list them individually. Click **Aggregate Services** at the **Order Services** screen, and the order form changes to reflect this service.

Choose one

Specific Services	Aggregate Services	Material Services	Report Services	Other Services

New Item Services	Ordered By: webbie

Service Type
Pickup (Pick up the item(s) at my business.)

Item Type
Container

Quantity

Order Account Code

Next >>

In the **Service Type** field, you can specify whether you want the record center to come pick up your items, or whether you are going to take the items to the record center.

The **Item Type** field allows you to specify the type of items you want the record center to store for you. Your choices are Container, Filefolder and Tape.

Enter the number of items going to the record center in the **Quantity** field. This allows the record center to make sure they have enough space in the delivery truck. If you are dropping the items off at the record center, they may need to plan how much assistance you will need.

In the **Order Account Code** field, you need to enter the account(s) that should be billed for this service. Enter your Account Levels, one, two or three of them. If you are using more than one Account Level, separate them with a backslash (e.g. 1000\1500\500 or ABCCORP\ACCT\PAYROLL).

Click **Next** to continue to the following screen:

The top of this dialog displays the contact and delivery address information that the system has for the account you specified. You may edit it if necessary.

The second section of the dialog allows you to enter the date and time that you want the Pick up or Receive to take place. The default date and time is tomorrow at noon. Change the date and time if necessary.

If you would like to include additional comments for the record center, enter them in the text box at the bottom of the dialog. Remember that there are only 80 characters allowed.

When all the information has been entered and confirmed for your order, click the **Add Order to Batch** button. This sends your order to the record center, and a confirmation similar to the one below appears:

Batch Order# 43		Tracking# 576		
Status > Submitted		Status Updated: 2001, Aug 10, 10:32 AM		
Ordered By:	Account	Scheduled For	Action	
webbie	4118	2001, Aug 11, 12:00 PM	Pickup	
			Qty	
			10	
Item Description				
Customer Comment				

Add more orders to this batch
View all orders in the current batch
Start a new batch
Back to main menu

Each order you place is given a tracking number. It is listed at the top right of the confirmation screen. Each order is also assigned to a batch. A batch can have one or a number of orders assigned to it. Your record center will discuss with you how it uses batches and together you can determine the best way to batch orders.

All information regarding your order is listed on the top half of the **Confirmation** dialog. At the bottom you are given several options:

Add more orders to this batch: Clicking this option takes you back to the first **Specific Services** dialog. The current batch number appears at the top.

View all orders in the current batch: Clicking this option gives you a screen with all the orders in the current batch. From that screen you can view all the

orders associated with this batch, as well as add more orders to the batch or exit.

Start a new batch: When you choose this option you are returned to the first Specific Services dialog.

Material Services

Material Services include items that you can purchase (or receive) from the record center. Commonly this includes containers of various sizes and barcode labels. Let's go through the fields, assuming that you will be purchasing 1 Cubic Foot containers. At the main Order Services screen, click **Material Services**, and the order form changes to reflect this service.

Click the down arrow next to the **Item Type** field. This offers you a list of the materials available to you. For our example, you would click Boxes – 1 cf. The description may be worded differently than it is in our examples, as your record center has set up its own definitions to reflect their business.

Tab to the **Quantity** field and enter the number of boxes you want delivered.

Tab to the **Requested By** field, and enter your name or the name of the person who is requesting these boxes.

Tab to **Order Account Code** and enter the account(s) that should be billed for this service. Enter your Account Levels, one, two, or three of them. If you are using more than one Account Level, separate them with a backslash (e.g. 1000\1500\500 or ABCCORP\ACCT\PAYROLL).

Tab to the **Cost Center** field and enter a cost center if you want one referenced on the workorder.

Click **Next** to continue to the following screen:

The top of this dialog displays the contact and delivery address information that the system has for the account you specified. You may edit it if necessary.

The second section of the dialog allows you to enter the date and time that you want materials to be delivered. The default date and time is tomorrow at noon. Change the date and time if necessary.

If you would like to include additional comments for the record center, enter them in the text box at the bottom of the dialog. Remember that only 80 characters are allowed.

When all the information has been entered and confirmed for your order, click the **Add Order to Batch** button. This sends your order to the record center, and a confirmation similar to the one below appears:

Batch Order# 44		Tracking# 577			
Status > Submitted		**Status Updated: 2001, Aug 10, 10:41 AM**			
Ordered By:	Account	Scheduled For	Material		
webbie	4118	2001 , Aug 11 , 12:00 PM	Boxes - 1 cf		
			Qty	Requester	Cost Center
			25	Eric	
Customer Comment					

Add more orders to this batch

View all orders in the current batch

Start a new batch

Back to main menu

Each order you place is given a tracking number. It is listed at the top right of the confirmation screen. Each order is also assigned to a batch, which is listed at the top left. A batch can have one or a number of orders 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.

All information regarding your order is listed on the top half of the **Confirmation** dialog. At the bottom you are given several options:

Add more orders to this batch: Clicking this option takes you back to the first **Specific Services** dialog. The current batch number appears at the top.

View all orders in the current batch: Clicking this option gives you a screen with all the orders in the current batch. From that screen you can view all the orders associated with this batch, as well as add more orders to the batch and exit.

Start a new batch: When you choose this option you are returned to the first **Specific Services** dialog.

Report Services

Report Services are reports that can be ordered. Your record center has taken the time to set up custom report profiles for you. These have been created so that your report displays the information you want and looks the way you want it. You have the options of changing the setting in a profile; however, keep in mind that any changes you make can affect the outcome of your

report. For example, changing the font point size or the number of columns displayed may exceed the page width and cause your data to truncate. If a report is not printing out properly for you, contact your record center and they can adjust your profile accordingly.

Click **Report Services** at the **Order Services** screen, and the order form changes to reflect this service.

In the **Report Type** field, select the type of report you would like to order.

Enter an account in the **Order Account Code** field.

The **Requested By** and **Cost Center** fields are optional. If entered, they will appear on the report. When finished, click **Next**.

Your record center may create custom profiles for you for each of the reports available. A profile is just a set of printing options that is customized and assigned to a specific report for your convenience. If more than one profile has been created for the report you selected, the following screen will appear. If no profiles were created for you, that means you are using the default settings and this screen will not appear. Either way, you still have the option of making changes to the print options.

Select the profile you want to use for this report and click **Next**. The options screen for the report and profile you selected appears. The values that have been selected by your record center display, but you can make changes to any field.

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

Enter the date you need the report in the **Requested By** fields.

The fields in the bottom half of the screen display the values entered in the profile for this report. You can change any of the values that you want.

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

sure they print properly. Next, you can change the orientation to portrait or landscape.

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

Check the **Combine Level 2 with Level 1** or the **Combine Level 3 with Level 2** check box to combine results for the two account levels.

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

The bottom section of the screen displays Report Options. The available choices will vary depending on the report you have selected.

Once you have made any desired changes, click **Next**. The Columns and Sort Order screen appears.
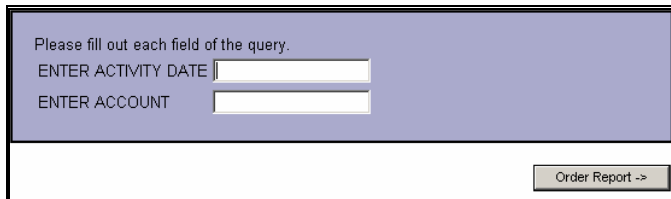
All the columns that are available for your report are listed in the **Columns** section. Any column with its check box selected will print. If the check box is cleared, the column will not print on the report. You cannot change the order in which the columns will appear. You can only decide if you want them to print or not.

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

When you are finished making any changes, click **Next**. If a customized query has been assigned to the selected profile by your record center, it will appear. If a customized query not been assigned by your record center, this screen will not appear.
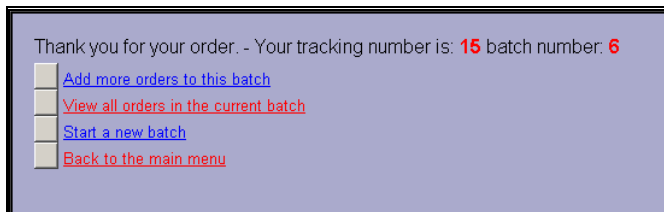
```
Please fill out each field of the query.
  ENTER ACTIVITY DATE [            ]
  ENTER ACCOUNT         [            ]

                                          Order Report ->
```

Enter the values you want and click **Order Report**. If there are no blank fields displayed, click **Order Report** to continue. A confirmation appears with your tracking and batch numbers and the report request is sent to your record center.

```
Thank you for your order. - Your tracking number is: 15 batch number: 6
  Add more orders to this batch
  View all orders in the current batch
  Start a new batch
  Back to the main menu
```

You can then choose from the following options: *Add more orders to this batch, View all orders in the current batch, Start a new batch, Back to the main menu.*

Other Services

Other Services include 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. This would fall under the Other Services category. Your record center will have set up its own Other Services, using their own wording, so the ones in this example may not match what you see on your screen.

Click the words **Other Services** on the **Order Services** screen. The order form changes to reflect this service.

In the **Item Type** field, click the down arrow. All available Other Services that your record center offers appear. In our example, we would choose the faxing service.

Tab to the **Quantity** field. In our example, the document we need is three pages long, so we would enter "3".

Tab to the **Requested By** field, and enter your name or the name of the person who is requesting this service.

Tab to **Order Account Code** and enter the complete Account Code for the account to be charged for this order. Enter your Account Levels, one, two or three of them. If you are using more than one Account Level, separate them with a backslash (e.g. 1000\1500\500 or ABCCORP\ACCT\PAYROLL).

Tab to the **Cost Center** field and enter a cost center if you want one referenced on the workorder.

Click **Next** to continue to the following screen:

The top of this dialog displays the contact and delivery address information that the system has for the account you specified. You may edit it if necessary. Since our order is being faxed, the physical address is not important anyway – but the fax number is critical.

The second section of the dialog allows you to enter the date and time that you want your fax to be sent. The default date and time is tomorrow at noon. Change the date and time if necessary.

If you would like to include additional comments for the record center, enter them in the text box at the bottom of the dialog. Remember that only 80 characters are allowed.

When all the information has been entered and confirmed for your order, click the **Add Order to Batch** button. This sends your order to the record center, and a confirmation similar to the one below appears:

Batch Order# 46		Tracking# 579			
Status > Submitted		Status Updated: 2001, Aug 10, 10:56 AM			
Ordered By:	Account	Scheduled For		Service	
webbie	4118	2001, Aug 11, 12:00 PM		Fax Charge	
			Qty	Requester	Cost Center
			3	Eric	
Customer Comment					

Add more orders to this batch

View all orders in the current batch

Start a new batch

Back to main menu

Each order you place is given a tracking number. It is listed at the top right of the confirmation screen. Each order is also assigned to a batch that is listed at the top left. A batch can have one or a number of orders 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.

All information regarding your order is listed on the top half of the **Confirmation** dialog. At the bottom, you are given several options:

Add more orders to this batch: Clicking this option takes you back to the first **Specific Services** dialog. The current batch number appears at the top.

View all orders in the current batch: Clicking this option gives you a screen with all the orders in the current batch. From that screen, you can view all the orders associated with this batch, as well as add more orders to the batch, and exit.

Start a new batch: When you choose this option you are returned to the first **Specific Services** dialog.

Check Status of Orders

Once you have placed an order through RS-Web, you can track its status as it is fulfilled by the record center. From the Home Page, click **Check Status of Orders** to access the screen shown below.

You can find the orders that you want to track using different criteria. You can tell the system what batch number(s) or what tracking number(s) 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 searching variables to find orders that match more than one criterion. For example, find all orders placed during the last week that have been fulfilled.

Searching by Batch Number Range

When you submit an order through RS-Web, 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.

Batch Number range:
745,792,800-804

Searching by Tracking Number Range

Searching by tracking number works exactly the same as searching by batch number. The only difference is that each tracking number represents an individual order, whereas one batch number can represent several orders. To search for orders by tracking number, you can enter a single tracking number, more than one tracking number, a range of tracking numbers, or a combination.
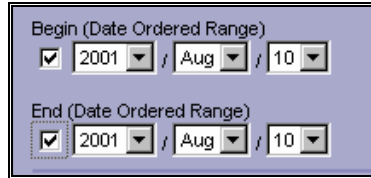
Tracking Number range:
915,1002-1005,1099

If you enter either tracking or batch numbers that do not belong to your account (as determined by your log in), they will not be included in the results.

Searching by Date Range

To check the status of orders placed during a specific time period, use the **Date Range** fields in the middle of the screen. Click the drop down arrows to select the dates of the date range for which you would like to search. Be sure to click the little box to the left of the **Date Range** fields. This tells the system that you want to search on those fields.

Begin (Date Ordered Range)
☑ 2001 ▼ / Aug ▼ / 10 ▼

End (Date Ordered Range)
☑ 2001 ▼ / Aug ▼ / 10 ▼

Searching by Status

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

None

Don't select this status. It is simply the default, and is used in conjunction with the criteria chosen above to tell the system to find all orders placed, regardless of their status.

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.

Combining Search Criteria

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

Search Results

When you click the **Search** button, a table appears that lists each order that meets your search criteria. Also listed is the **Tracking** number, the **Batch** number, the **Type** of order, its **Status,** and **Status Date,** as well as when it is **Scheduled For** fulfillment. You can click the word **Details** to view more information about any order or to access a Web report.

22 orders found - 20 per page

Track#	Batch#	Type	Status	Status Date	Scheduled For	
558	31	Pickup	Submitted	2001, Aug 8 9:28a	2001, Aug 9 12:00p	Details
559	32	Deliver	Submitted	2001, Aug 8 9:46a	2001, Aug 11 12:00p	Details
560	33	Pickup	Submitted	2001, Aug 8 9:49a	2001, Aug 11 12:00p	Details
561	34	Pickup	Submitted	2001, Aug 8 9:50a	2001, Aug 9 12:00p	Details
562	35	Deliver	Submitted	2001, Aug 8 10:50a	2001, Aug 9 12:00p	Details
563	35	Deliver	Submitted	2001, Aug 8 10:50a	2001, Aug 9 12:00p	Details
564	35	Deliver	Submitted	2001, Aug 8 10:50a	2001, Aug 9 12:00p	Details
565	35	Deliver	Submitted	2001, Aug 8 10:50a	2001, Aug 9 12:00p	Details
566	35	Deliver	Submitted	2001, Aug 8 10:50a	2001, Aug 9 12:00p	Details
567	35	Deliver	Submitted	2001, Aug 8 10:50a	2001, Aug 9 12:00p	Details
568	36	Deliver	Submitted	2001, Aug 8 10:53a	2001, Aug 11 12:00p	Details
569	37	Pickup	Submitted	2001, Aug 8 10:54a	2001, Aug 11 12:00p	Details
570	38	Materials	Submitted	2001, Aug 8 10:54a	2001, Aug 11 12:00p	Details
571	38	Report	Submitted	2001, Aug 8 10:55a	2001, Aug 8 10:55a	Details
572	39	Services	Submitted	2001, Aug 8 10:55a	2001, Aug 9 12:00p	Details
573	40	Pickup	Submitted	2001, Aug 8 11:18a	2001, Aug 9 12:00p	Details
574	41	Deliver	Submitted	2001, Aug 9 10:33a	2001, Aug 10 12:00p	Details
575	42	Deliver	Submitted	2001, Aug 9 3:56p	2001, Aug 10 12:00p	Details
576	43	Pickup	Submitted	2001, Aug 10 10:29a	2001, Aug 11 12:00p	Details
577	44	Materials	Submitted	2001, Aug 10 10:38a	2001, Aug 11 12:00p	Details

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[1] [2] [Next >>]

back to search

Retrieving a Web Report

To access a Web report once you have located the order, click the word Details.

If the report has not yet been completed, the report criteria displays and the following message is shown.

```
Batch Order #31                            Tracking #96
Ordered: 2002, Nov 12 11:03a              Submitted : 2002, Nov 12 11:03a
Ordered By        Account      Scheduled For                    Service:

WEBBIE            1000         2002, Nov 12 12:00a              report

Your report is not yet complete. The link will appear here once your order has been fulfilled.

Criteria:

Report Type: Container Activity Rpt

Report Criteria:
     acct_number: 1000
     cost_center:
     requester: Mary
     BottomMargin: 0.0
     RightMargin: 0.0
     LeftMargin: 0.0
     TopMargin: 0.0
     Orientation: Portrait
     requestByDay: 12
     requestByMonth: 11
     requestByYear: 2002
     Title: Container Activity for May
     Font Face: Courier
     Font Size: 12pt.
```

If your report has been completed, the criteria displays along with instructions on how to access and save the report.

NOTE: You need to have Adobe Acrobat Reader installed on your computer in order to access your report. If you do not have it installed, it can be downloaded by clicking the Suggested Applications icon on the main page. Click the Adobe Acrobat Reader link and follow Adobe's instructions for downloading and installation.

Batch Order #31			Tracking #96
Ordered: 2002, Nov 12 11:03a			Fulfilled : 2002, Nov 12 11:08a
Ordered By	Account	Scheduled For	Service:
WEBBIE	1000	2002, Nov 12 12:00a	report

Instructions: To save your report, right click on the link below and choose "Save Target As...". You will be prompted for a name and a location. Ensure that the name you choose ends with a ".pdf" extension. The best choice for a location is usually somewhere such as your Desktop or your "My Documents" folder. Once the document is saved, it will be available on your local machine. Simply double clicking on the icon will launch the Acrobat Reader. No connection to the internet is needed to read the document. You will need the free Acrobat Reader application from Adobe.com. Please click here to go directly to the download area.

Download your report.

Criteria:

```
Report Type: Container Activity Rpt

Report Criteria:
     acct_number: 1000
     cost_center:
     requester: Mary
     BottomMargin: 0.0
     RightMargin: 0.0
     LeftMargin: 0.0
     TopMargin: 0.0
     Orientation: Portrait
     requestByDay: 12
     requestByMonth: 11
     requestByYear: 2002
     Title: Container Activity for May
     Font Face: Courier
     Font Size: 12pt.
```

NOTE: Left-clicking the report link produces the following error message: You must right-click this link and choose "Save Target As…" then save the file with a .pdf file extension (i.e. MyReport.pdf).

Update Item Information

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

To complete the updating process, you will first conduct a query to find all the items for which you want to enter data. To do this, simply provide the system with enough information to allow it to find those items. 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 click each one and edit any of the fields for each item.

Searching for Items

In the main (home) screen of RS-Web, click the **Update Item Information** icon. The following screen appears.
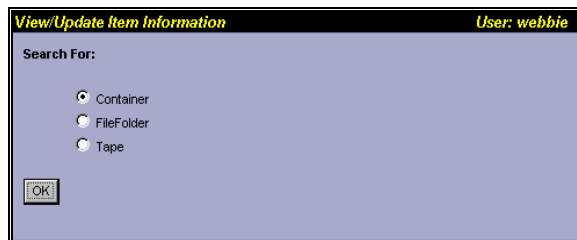
This screen lets you tell the system what type of items you want to edit; you can select Container, Filefolder, or Tape.

Click **OK** to move to the next screen.

This screen works the same way as the Query and Post screen and allows you to narrow the search for the items you want to update. First, determine what information is necessary to identify the items you want to load onto your screen.

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

In the Item Details section, define the criteria for your search. Click the down arrow next to the Field and Operator fields to view all available options. Additional fields become available depending on the Field and Operator selected.

The **Display Fields** section allows you to indicate which fields you want to appear on the table. All items that are checked (✓) appear on the table.

After you have entered all the information, click **Submit Query**. RS-Web accesses the RS-SQL database and

conducts your search. A screen similar to the following appears.

Search returns 20 results   Global Edit

Click the column header to sort on that column. Click here for advanced sort

Item Code	Account	Status	Status Date	Alt Code	Add Date	Destroy Date	Sequence	
134500	1000	Out	2000, Apr 22	145	2000, Apr 21	2001, Sep 1	ABBOTT-CONSUELO	Edit
134501	1000	Out	2000, Apr 22	146	2000, Apr 21	2001, Sep 1	CONZAN-FAGGORTY	Edit
134503	1000	Out	2000, Apr 22	148	2000, Apr 21	2001, Sep 1	IRVING-KINGS	Edit
134505	1000	Out	2000, Apr 22	150	2000, Apr 21	2001, Oct 1	OZONE-POTTER	Edit
134506	1000	Out	2000, Apr 22	151	2000, Apr 21	2001, Oct 1	PROZO-QUARTERMAINE	Edit
134508	1000	Out	2000, Apr 22	153	2000, Apr 21	2001, Oct 1	THOMAS-VICTOR	Edit
134509	1000	Out	2000, Apr 23	135	2000, Apr 23	2001, Oct 1		Edit
134510	1000	Out	2000, Sep 30	136	2000, Apr 23	2003, Dec 31		Edit
134514	1000	Out	2000, Apr 23	140	2000, Apr 23	2003, Dec 31		Edit
134517	1000	Out	2000, Apr 23	143	2000, Apr 23	2003, Dec 31		Edit

[<< Prev] **[1]** [2] [Next >>]

Click here to add more results to this resultset
Click here to modify and re-run the last query

If you find that you did not get all the search results you were looking for, you have two choices.

1) Click the **Click here to add more results to this resultset** link to return to the **View/Update Item Information** screen.

View/Update Item Information   *User: webbie*

Search for all Containers where...

Add Date Is Equal To 2001, August 10

[Add More]   [Delete]

— Item Details —

Field   Operator
[Add Date ▼]   [Is Equal To ▼]

[2001 ▼]   [August ▼]   [10 ▼]

Items per Page: [10 ▼]   ☑ **Append Results**   [Submit Query]

Display Fields:
☑ Item Code   ☑ Alt Code
☑ Account   ☑ Add Date
☑ Status   ☑ Destroy Date
☑ Status Date   ☑ Sequence

☐ User Defined 1   ☐ User Defined 3
☐ User Defined 2   ☐ User Defined 4
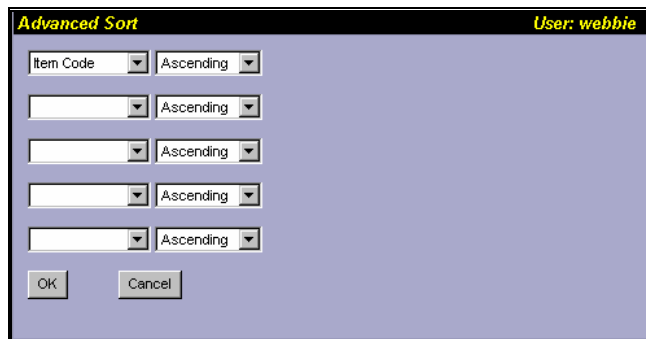
There is now an **Append Results** check box available. It is selected by default. Once you define your new query, all new results will be added to the existing results. If the check box is not selected, the existing results will be cleared and only results of the new query will display in the results table.

2) Click the **Click here to modify and re-run the last query** link to delete the current results, modify search criteria and re-run the query

Sorting

Once you have all your items listed in the table, you may prefer to have the data sorted differently. There are two different ways to sort. You can either click the column heading of the column by which you want to sort. The data is re-sorted, and the column heading appears in red to indicate that it is the sort by column. Clicking the column heading again toggles the sort between ascending and descending order.

Or, if you want to do a more advanced sort, click the **Click here for advanced sort** link which is directly above the table. The following screen appears.

You can sort by up to five different items using the drop down arrow in the first column. Your options for sorting are: Item Code, Account, Status, Status Date, Alt Code, Add Date, Destroy Date, and Sequence Begins. For each of these items, you can then select Ascending or Descending order for the sort. Once you have made your selections, click **OK**, and the data is re-sorted.

Editing Items

Now that you have all the items you want on your screen, you can edit them and complete the data entry you need. The information shown for each item is there simply to help you identify it. To edit or add information to the item, click the word **"Edit"** at the far right of the item you want. RS-Web and RS-SQL communicate and a screen similar to the one below appears.

The information across the top of the screen cannot be changed. New or additional information can be entered into the rest of the data fields.

When you have finished making changes, click **Submit**. A confirmation screen appears letting you know that your update was successful.

From here, click the **Back to resultset** link and you are returned to the results table to continue editing other items.

Global Editing

To global edit all the items that match your search criteria, from the search results screen, click the words **Global Edit** next to the number of items that the search found. The following dialog appears.

Notice that because any information you put in this dialog will affect more than one item, no item information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for an item.

To Global Edit a field, first click in the box next to the field's name. Second, put whatever characters you want to appear in that field for all the items. Be aware that if a field is checked, but left blank, the field will be edited to blank for all the items. Check only the fields you want to Global Edit.

When you have finished making changes, click **submit**. A confirmation screen appears letting you know that your update was successful.

Append / Replace

Note that next to the **Contents** and **Description** field names there are **Append** and **Replace** boxes. When Append is checked, any text you enter into the box is added to the end of any existing text. When **Replace** is checked, any existing text is deleted and the new text appears.

Suggested Applications

As you know, Web applications are built to work with other applications. RS-Web works best with Microsoft Internet Explorer. Adobe Acrobat Reader makes it possible for you to view and print reports in RS-Web. If you don't already have these programs, RS-Web gives you the links to get them. From the RS-Web home page, click the **Suggested Applications** button. The following screen appears.

To download either of these applications, click the icons or the words to the right of them. When you click **Internet Explorer**, you will go to the Microsoft Internet Explorer Web site, and from there simply follow Microsoft's instructions for downloading the most recent version of Internet Explorer.

When you click **Adobe Acrobat Reader**, you will go to Adobe's Acrobat Reader Download page. Simply follow Adobe's instructions for downloading.

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