The Web Data Entry Module – End User Instructions

Welcome to the Archive Manager Web Data Entry Module!

Archive Manager's Web Data Entry Module permits you to enter data about boxes and folders going to your record center directly into the center's database, without resorting to CD's or other media. You may request delivery of boxes and folders currently in the center.

Box and folder records are submitted to the record center in **batches** or groups, which simplifies handling at both ends of the process.

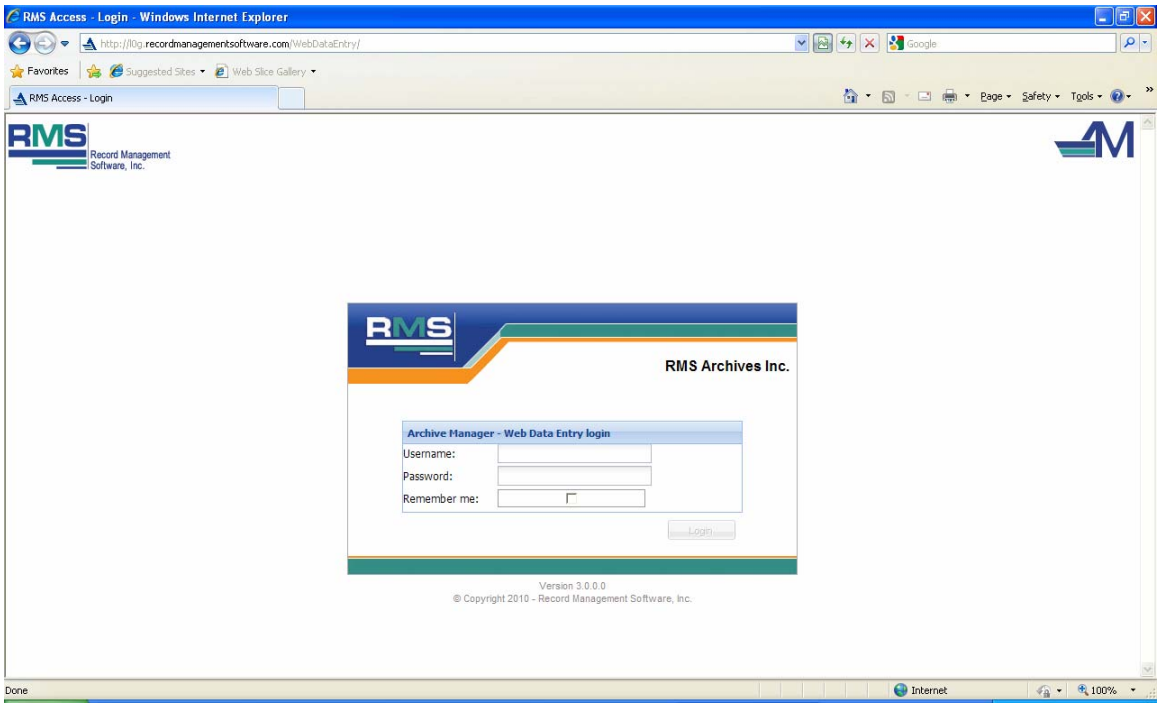
Follow the instructions in this section to set up your account, to access your records, or to request delivery.

Obtain a User Name and Password

Before your firm can use the Archive Manager Web Data Entry Module, you must contact your archive service provider and designate the users who will have access to Web Data Entry. You may designate as many users as desired. The archive service provider will assign each person a user name and password for logging into the Web Access system. If your firm has multiple departments, each can designate its own users.

NOTE: *Users may be granted access to their own department's records only, or to global access to records of all departments. When setting up contacts with your archive service provider, remember to specify which type of access is desired for each user.*

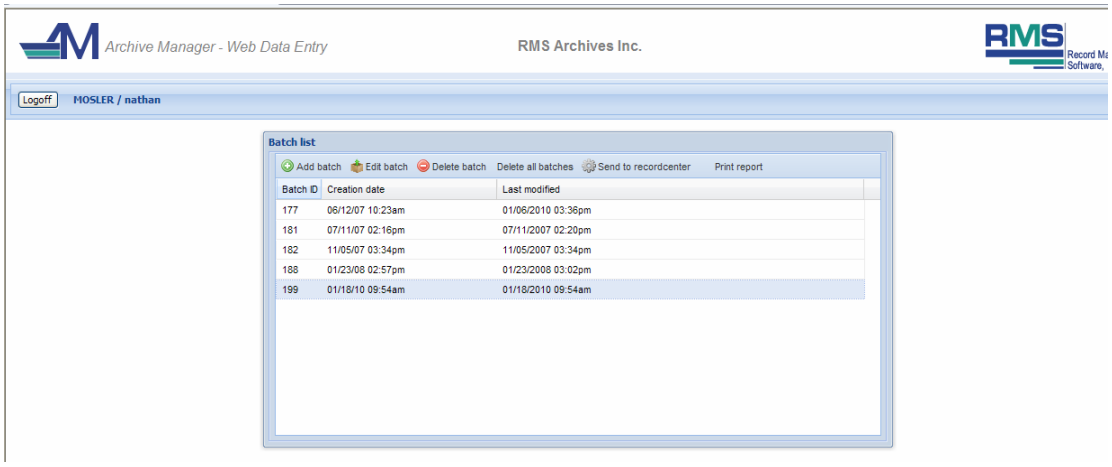
Logging in



To access the Login Page, go to your archive service's home page and click the link for Archive Manager Web Data Entry Module. The login page will appear.

Enter the User Name and Password, and click **Login**.

The Batches List Screen



After you have logged in, the Existing Batches screen will appear.

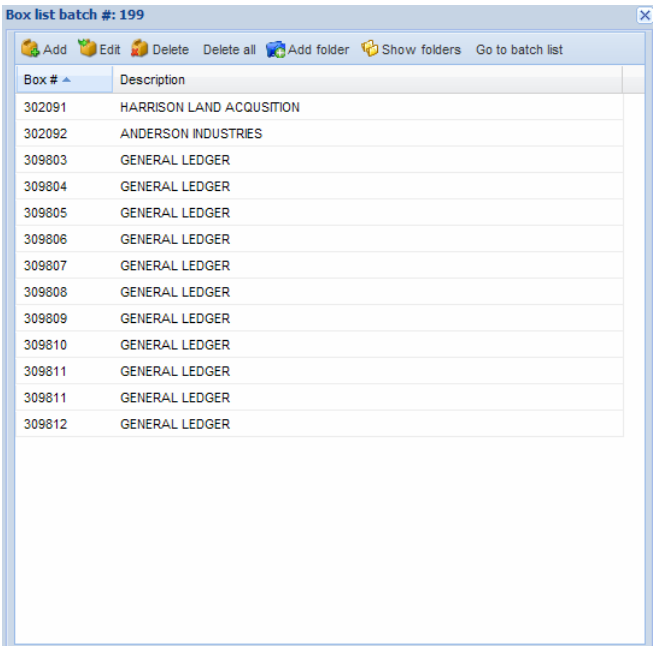
This screen displays any batches you may have started but not yet submitted.

- Add Batch – If there are no existing batches, press the Add Batch button to create a new batch. A new batch is created and a Batch Number is automatically assigned – you will automatically be directed to the new box data entry screen.
- Edit Batch – Brings up the list of boxes in that batch.
- Delete – Deletes the batch and all its boxes and folders.
- Delete all batches – Deletes all batches and their corresponding boxes and folders.
- Send to record center - Finalizes the batch, transmits the information to the record center, and removes the batch from the Existing Batches (and Boxes and Folders) – see below.
  NOTE: *Only click this button when you are ready to transmit your batch to the record center.*
- Print report – Provides a printable version in your browser -see below.

The Boxes in the Batch Screen

To see the content of a batch, click the Edit Batch button. The Boxes in the Batch screen appears, displaying a list of the boxes previously entered into this batch, as well as the following menu choices:

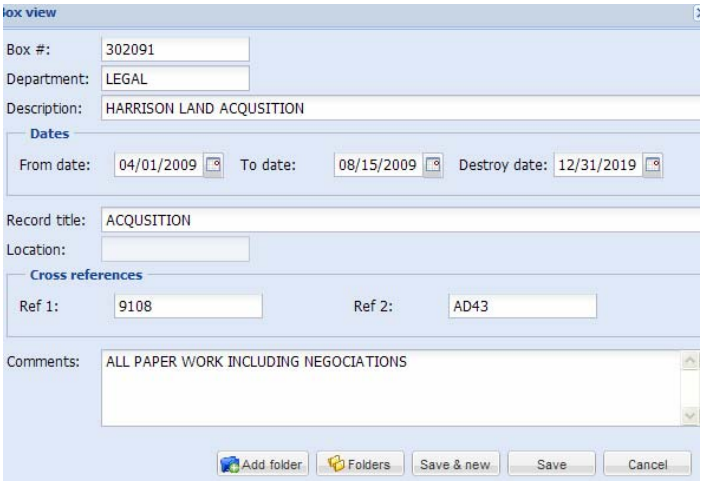
- Add – enter information for a new box and folders
- Edit – edit an existing box
- Delete – deletes the selected box
- Delete All – Deletes all boxes within the selected batch.
- Add folder – add folders to a box
- Show folders – brings up the list of folders for the selected box
- Go to batch list – returns to batch list



THE EDIT BOX DETAILS SCREEN

From Batch list, click add batch or in the Box list click add the to add a new box to an existing batch. The Edit Box Details screen appears.

The following fields are present. (Fields with a red " * " are required):



- ***Box #** – 9 position numeric field (taken from the bar codes supplied by your record center).
- **Department** – Department Code, a 10 position alphanumeric field.
- ***Description** – 50 character alphanumeric field for description of box contents
- **From Date** – Date field used in conjunction with the To Date field to describe the time interval covered by box contents.

NOTE: *Dates are entered in format MM/DD/YYYY, but you do not need slashes in data entry. For example, typing 051509 results in 05/15/2009.*

- **To Date** – Date field used in conjunction with the From Date
- **Destroy Date** – Date field indicating the month, day, and year this box is eligible for destruction. If left blank, will populate with 12/31/9998 by default, which Archive Manager interprets to mean **permanent**.
- **Record Title** – Record Title code; must match code set up in Archive Manager.
- **Location** (optional) – The location code for this box (if selected).
- **Cross Reference** (optional) – 10 positions; typically the client's box or reference number (if selected).
- **Comments** (optional) – An unlimited text field for additional box information (if selected).

Clicking **Save & New** carries the data forward to the next box for Department, Destroy Date, From and To Dates, Description, and Record Title.

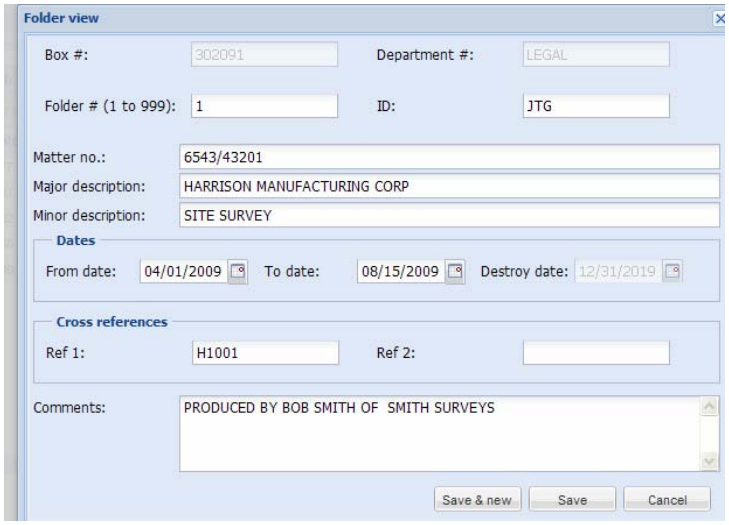
Explanations of other buttons:

- **Add folder** – Add folders to box
- **Folders** – Lists folders within box
- **Save** – Returns you to the box list
- **Cancel** – Cancels your add/ edit and returns you to the box list

THE EDIT FOLDER DETAILS SCREEN

To add a new folder to a batch, click the **Add** Folders in the Box Edit Screen or on the Box List. The Edit Folder Details screen appears.

The Box Number, Department, From and To Dates, and Destroy Date information are captured from the current box, and a new Folder Number is automatically created.



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The following fields are present. Fields with a red " * " are required:

- ***Folder #** – 3 position numeric; populated automatically, but may be changed manually.
- **ID** – 10 position alphanumeric; typically, the last name or initials of the person in your company who is responsible for this folder, such a partner, manager or corporate officer.
- **Matter No**. – 13 characters alphanumeric; typically case numbers, patient numbers, claim numbers, etc.
- ***Major Description** – 50 characters alphanumeric; general description of folder (i.e., ABC Co. vs XYZ Co.).
- **Minor Description** – 50 characters alphanumeric; detail of folder contents (i.e., Depositions for ABC Co.).
- **From Date** – Date field used in conjunction with the To Date field to describe the time interval covered by folder contents; captured from Box data, but can be changed manually.
- **To Date** – Date field used in conjunction with the From Date; captured from Box data, but can be changed manually.
- **Destroy Date** – Date field indicating when folder box is eligible for destruction; captured from Box data, but can be changed manually.
- **Cross Reference** (optional) – Your file or reference number (if selected, maximum of 10 positions).
- **Comments** (optional) – An unlimited text field for additional information about a box (if selected).

Click **Save & New** save the current data and open a fresh Edit Folder Details screen. As previously, the data is carried forward for ID, Matter #, Major Description, Minor Description, and From and To Dates.

Folders in the Box Screen

Clicking **Save** takes you to the Folders List screen, where you can review the contents of the selected box, or choose a folder to edit or delete.

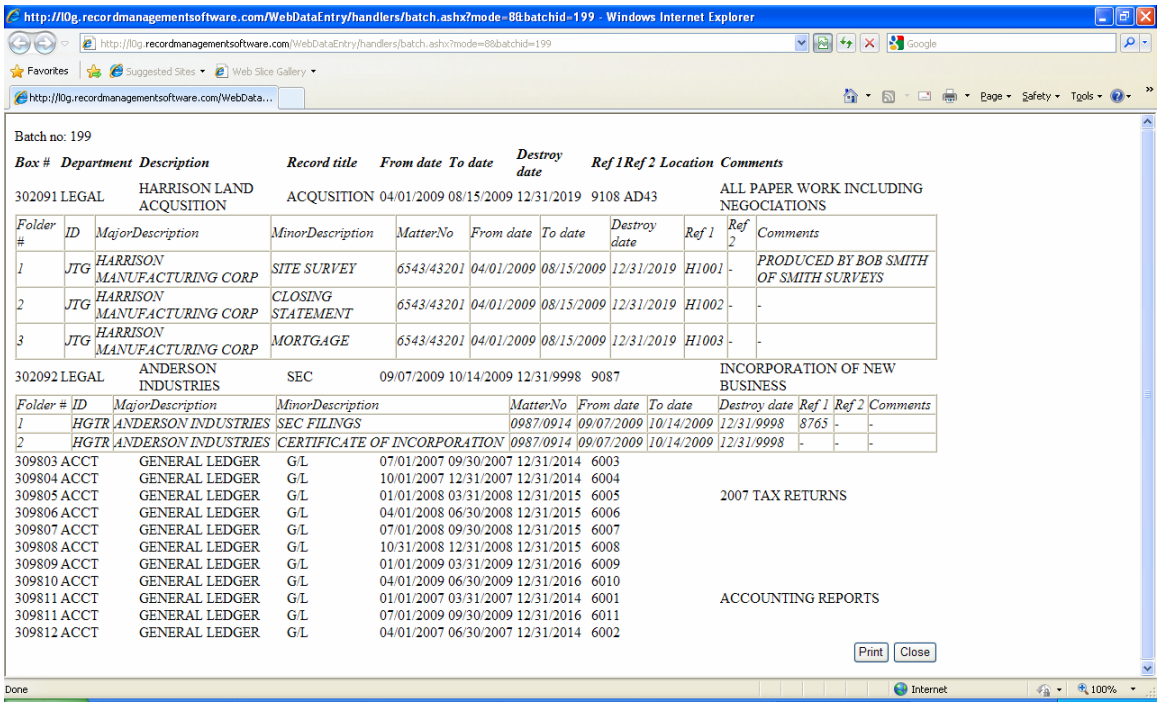
To enter more boxes or to preview the current batch, click **Go To Box Page** to return to the Boxes in the Batch screen.

Explanations of buttons:

- **Add** – Add folders to box
- **Edit** – Edit an existing folder
- **Delete** – Deletes the selected folder
- **Go to box list** – Returns you to the box list
- **Go to batch list** – Returns you to the batch list
- **Delete all** – Deletes all the folders for this box

Previewing

It is good practice to preview the contents of your batch before you submit to the record center. From the Batch List screen, click the **Print Report** button to list the boxes and folders in the current batch to the screen.



You can then click **Print** to send the report to your printer.

Finalization and Import

When you have finished doing all your data entry, return to the Batch List and click **Send to Record Center**. This finalizes the batch, transmits the information about your boxes and folders to the record center, and removes the batch from the Batch List (and the Box and Folders Lists).

NOTE: *Only click this button when you are ready to transmit your batch to the record center.*

Logging out

Click Logoff in the upper left of the main background screen to exit Web Data Entry. You need to be at the Batch List to log out. Remember that if you forgot to send your batch, you can always log in again and sent it from the Batch list page.