Archive Manager Web Access User Instructions

Welcome to the Archive Manager Web Access Module!

Archive Manager's Web Access Module was designed to be intuitive and easy to use. Follow the instructions in this section to set up your account, to access your records, or to request services.

Set Up a User

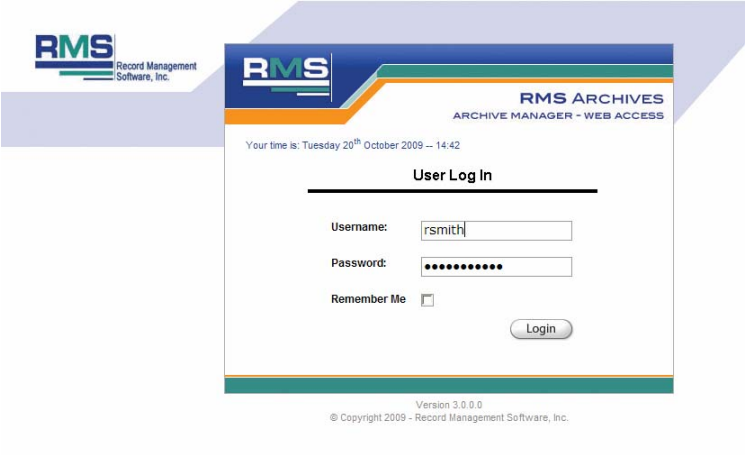
Before your firm can use Archive Manager Web Access, you must contact your archive service provider and designate persons who will be the authorized Web Access users. The archive service provider will assign each person a user name and password for logging into the Web Access system. Your firm may designate as many users as desired. Moreover, 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

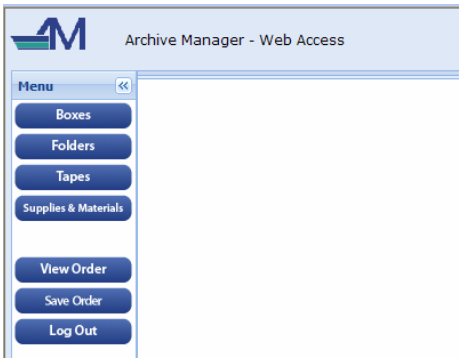
To access the Login Page, go to your archive service's home page and click the link for Archive Manager Web Access. The login page will appear.

Simply enter the User Name and Password, and click **Login**.



The Web Access Menu will appear, offering seven choices of action:

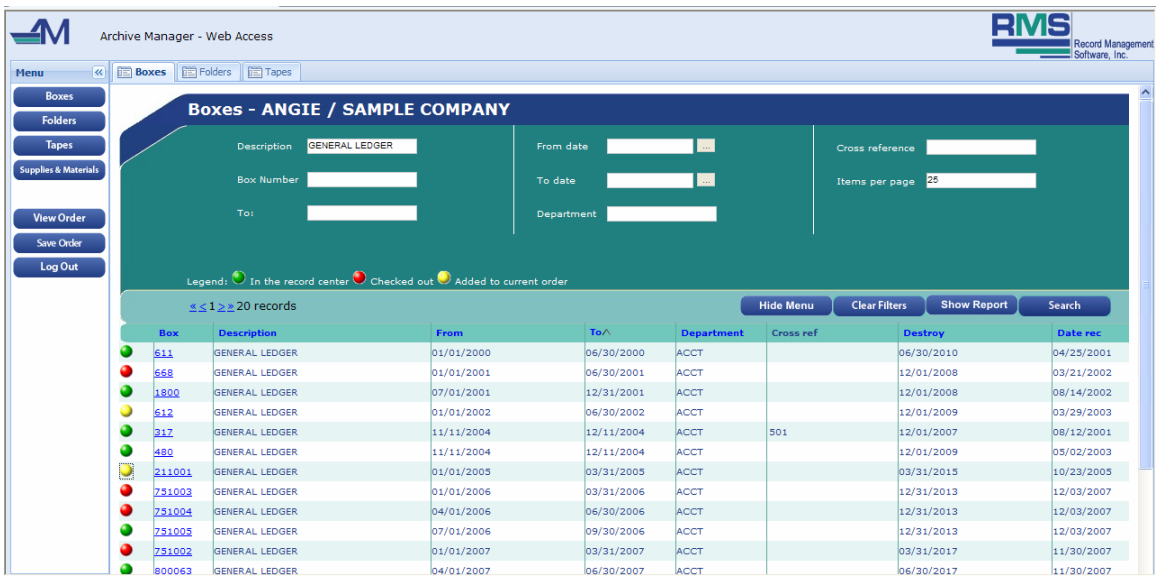
- Boxes
- Folders
- Tapes
- Supplies & Materials
- View Order
- Save Order
- Log Out



General Navigation

As you click on the choices, at the top of all the lists you will notice tabs for your open windows for boxes, folder, tapes, view order, and supplies & materials. You can just click these tabs to navigate between all the open windows. Your filter settings will remain as you jump from window to window. And when you log out, the windows will automatically close.

BOXES



Select **Boxes** to look up and check out boxes.

The View Boxes screen appears, sorted by default on the Description field.

Searching for boxes

You can search for boxes by a number or phrase in six categories which can be used in conjunction:

- Box Contents
- Box Number
- Box Number To
- From Date
- To Date
- Department
- Cross-Reference

To perform a Search, type the number or phrase on which you are searching in the appropriate filter and click the **Search** button. To clear your selection click **Clear Filters**.

Note if your password is limited to one particular department, the department filter will be filled in with department code and cannot be erased or altered.

If you need to indicate one or more missing characters in your search, you can use % as a wild-card. For example, if you were searching for a Description like "*2008 or 2009 Sterling Closing*", and couldn't remember exactly whether the closing occurred in 2008 or 2009, you could enter "*% Sterling Closing*" to display all existing possibilities.

To use the From Date and To Date filters, click on the ellipse to the right of those filters to bring up the date dialog box. The From Date filter will select all boxes greater than or equal to that date. The To Date filter will select all boxes less than or equal to that date.

A symbol legend appears at the top of each Web Access screen. In Boxes:

- **Green dot** – box is currently in the record center.
- **Red dot** – box has been checked out. Clicking on the red dot displays the Checkout Window, where you can see who checked out the box.
- **Yellow dot** – box has been requested for check out.

Comments

To see comments for a box, click on the box number.

Sorting

All Web Access forms may be sorted by clicking on the column heading. The first click puts the items in ascending order under that heading. A second click puts the items in descending order.

Checkout

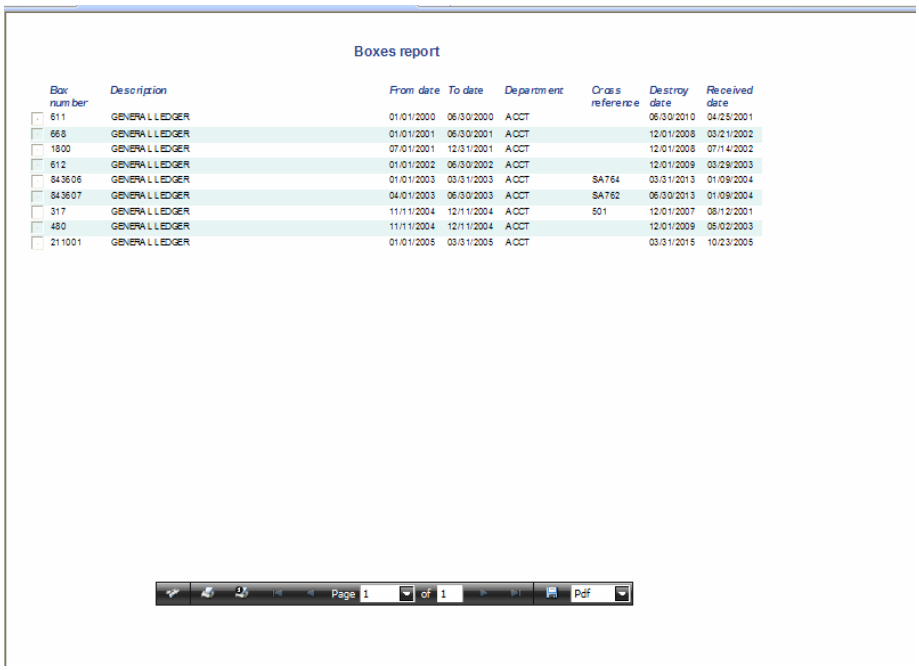
To check out a box, simply locate and select the desired item and click the Green dot at the left. A Yellow dot will appear in its place and the box has been added to the order.

If you have selected a box in error, simply click the Yellow dot to the left to remove the request. Because your company, name, and address are identified when you log in, there is nothing further to do.

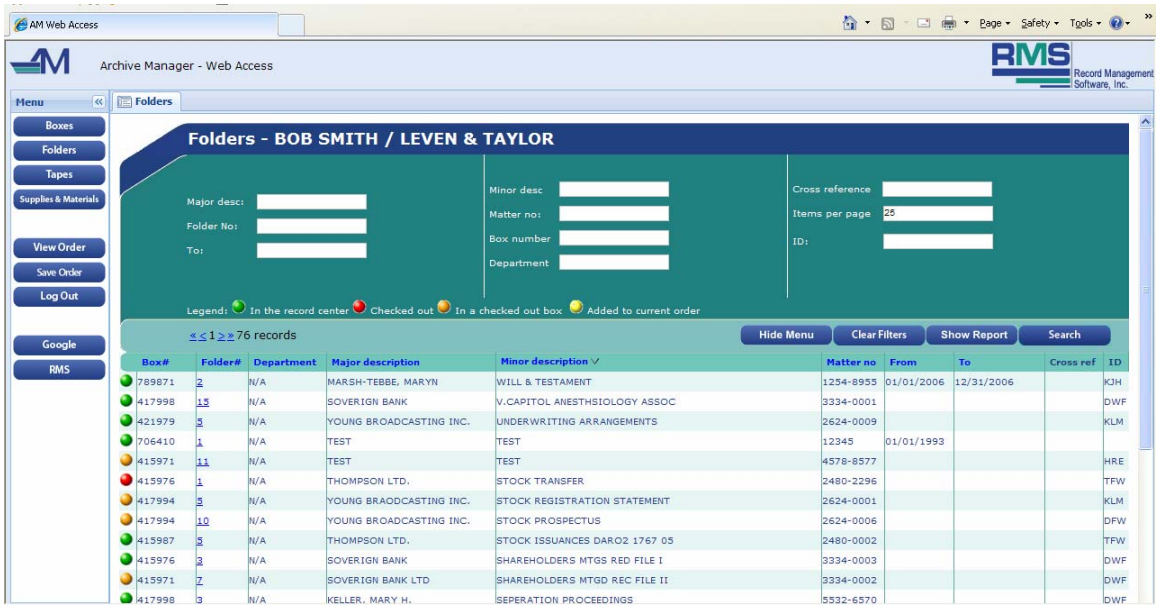
To see who has a checked out box, click the Red dot at the left. A box will appear with the name of the person and the date that he/she checked out the box.

Reports

On each of the View screens, when the filtered list is displayed, you can click the Show Report button to generate a screen report of the filtered and sorted list. You can then export the report to a PDF file by clicking the Save button at the lower right of the screen. To print all items, leave the filters blank.



FOLDERS



Click the folder icon to the right of a box to see all of the folders within that box. Only boxes with folders will have the icon. The Folders screen appears, sorted by default on the Description field. Or click Folders on the left menu.

In this screen you can look up and check out.

Searching for folders

You can search for folders by a number or phrase in one of the following categories, which can be used in conjunction:

- Major description
- Minor description
- Folder number
- Matter
- Box number
- Department
- Cross Reference
- ID

To perform a Search, type the number or phrase on which you are searching in the appropriate filter and click the **Search** button. To clear your selection click **Clear Filters**.

As when searching for boxes (above), if you need to indicate one or more missing characters in your search, you can use % as a wild-card.

A symbol legend appears at the top of each Web Access screen. In Folders:

- **Green dot** – Folder is currently in the record center.
- **Red dot** – Folder has been checked out. By clicking on the red dot you can view the checkout window as to whom the box has been checked out to.
- **Orange dot** – Folder is in a box that is checked out.
- **Yellow dot** – Folder is scheduled for delivery.

Comments

To see comments for a folder, click on the folder number.

Sorting

All Web Access forms may be sorted by clicking on the column heading. The first click puts the items in ascending order under that heading. A second click puts the items in descending order.

Checkout

To check out a folder, simply locate and select the desired item and click the Green dot at the left. A Yellow dot will appear in its place and the folder has been added to the order.

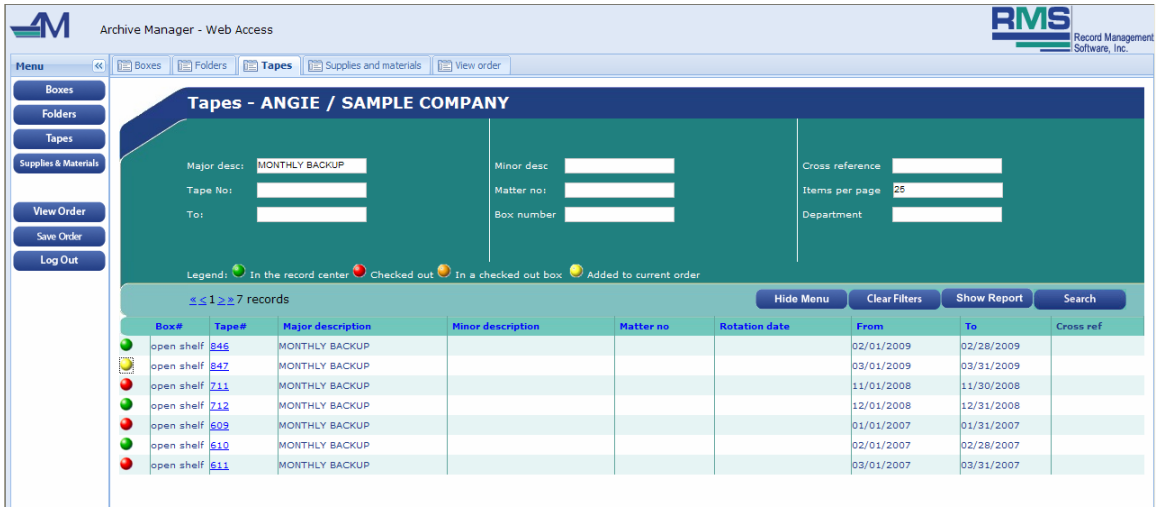
If you have selected a folder in error, simply click the Yellow dot to the left to remove the request. Because your company, name, and address are identified when you log in, there is nothing further to do.

To see who has a checked out folder, click the Red dot at the left. A box will appear with the name of the person and the date that he/she checked out the folder.

Reports

Like Boxes, when the filtered list is displayed, you can click the Show Report button to generate a screen report of the filtered and sorted list. You can then export the report to a PDF file by clicking the Save button at the lower right of the screen. To print all items, leave the filters blank.

TAPES



You can search for tapes by a number or phrase in one of the following categories which can be used in conjunction:

- Major description
- Minor description
- Tape number
- Matter
- Box number
- Cross Reference
- Department

To perform a Search, type the number or phrase on which you are searching in the appropriate filter and click the **Search** button. To clear your selection click **Clear Filters**.

As when searching for boxes (above), if you need to indicate
one or more missing characters in your search, you can use % as a wild-card.

Symbols

- **Green dot** – Tape is currently in the record center.
- **Red dot** – Tape has been checked out. By clicking on the red dot you can view the checkout window as to whom the box has been checked out to.
- **Orange dot** – Tape is in a box that is checked out.
- **Yellow dot** – Tape is scheduled for delivery.

Comments

To see comments for a tape, click on the tape number.

Sorting

All Web Access forms may be sorted by clicking on the column heading. The first click puts the items in ascending order under that heading. A second click puts the items in descending order.

Checkout

To check out a tape, simply locate and select the desired item and click the Green dot at the left. A Yellow dot will appear in its place and the tape has been added to the order.

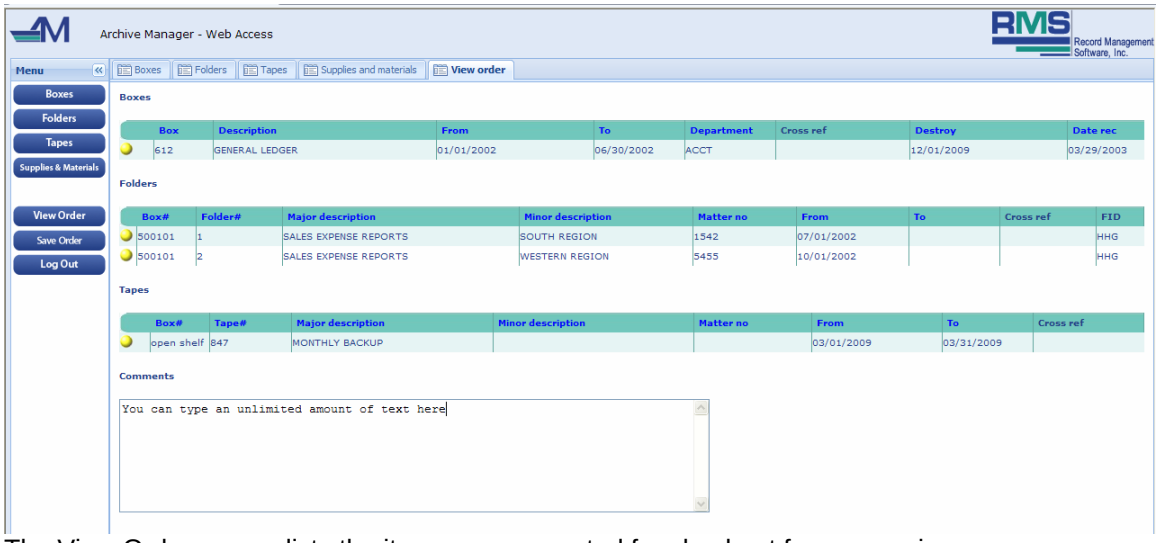
If you have selected a tape in error, simply click the Yellow dot to the left to remove the request. Because your company, name, and address are identified when you log in, there is nothing further to do.

To see who has a checked out tape, click the Red dot at the left. A box will appear with the name of the person and the date that he/she checked out the tape.

Reports

Like Boxes, when the filtered list is displayed, you can click the Show Report button to generate a screen report of the filtered and sorted list. You can then export the report to a PDF file by clicking the Save button at the lower right of the screen. To print all items, leave the filters blank.

THE VIEW ORDER SCREEN



The View Order screen lists the items you requested for checkout for your review.

Three lists are displayed; first boxes, followed by folders, and then tapes.

An Order Comments note field allows you to enter any amount of text.

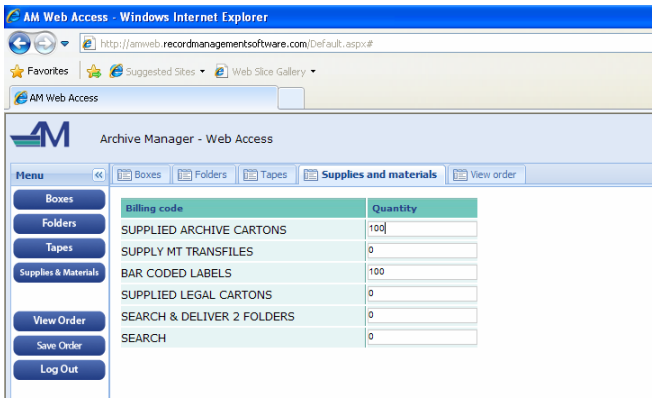
To remove any item from the order, simply click on the Yellow dot.

After the check out process is completed by clicking the Save Order button, the View Orders Selected Items list is cleared.

SUPPLIES & MATERIALS

Before saving your order, click the Supplies & Materials button on the Menu to add materials to the order. You may choose from a list to order boxes, bar codes, and other supplies. These will be added to your order.

The options on this list are determined by your record center. If a desired option is not offered, contact the center to request that the item be added.



SAVE ORDER

When you have finished making your selections, remember to click the **Save Order** button on the left menu.

This dialog box also appears if you accidentally try to log out without saving the order. Clicking the button generates a confirmation that the order has been processed and can send an email such as the following to the user. As well, the record center receives an email, indicating that your order is ready to be processed.

Subject: Message from the records center

Dear BOB SMITH,

This is a confirmation message from AM Web Access

Your order has been received.

Please to not reply to this message

Thank you,
RMS ARCHIVES

LOGGING OUT

Click Log Out to exit Web Access. Remember that if you forgot to save the order, you will be reminded on log out to save it.