



Client User Guide

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RSWeb[®] Overview

Overview

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

Logging In

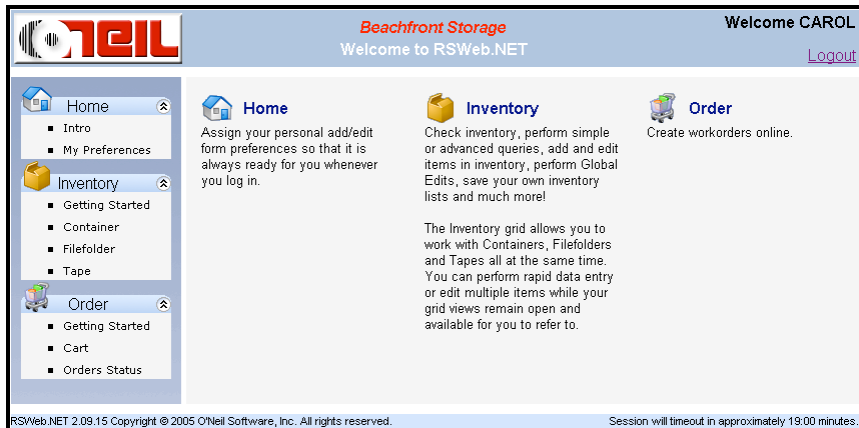
Security is important to you and your records. RSWeb respects that and requires that everyone who logs in have a current User Name and Password. These names and passwords are set up through your record center. Enter your User Name and Password in the appropriate fields, and click the **Login** button.



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NOTE: The screen displays the last User Name to log in. You can clear it and type in another user.

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



Home

From the Home menu, you can read an introduction of RSWeb, or determine your default forms for data entry.

Inventory

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

Order

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

Time Out Feature

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

Logout

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

Home

Introduction

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



Data Entry Form Preferences

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

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

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

Beachfront Storage Welcome CAROL

Default Form Configuration [Logout](#)

Please select default forms.

Container Forms

Add

Edit

Global Edit

Filefolder Forms

Add

Edit

Global Edit

Tape Forms

Add

Edit

Global Edit

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

Inventory

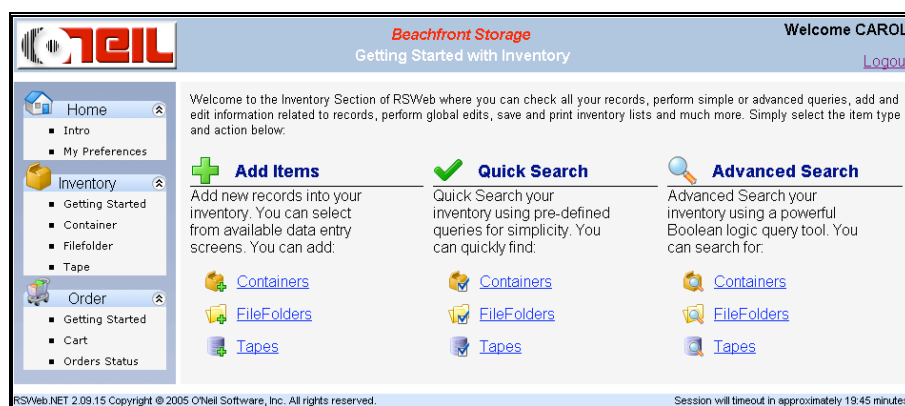
Introduction

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

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

Menu Options

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



The **Container**, **Filefolder**, and **Tape** menu options each bring up a grid. Each of these grids has several menu options available along the top of the grid. The menu options are the same for all three grids.

Options

Add

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

Edit

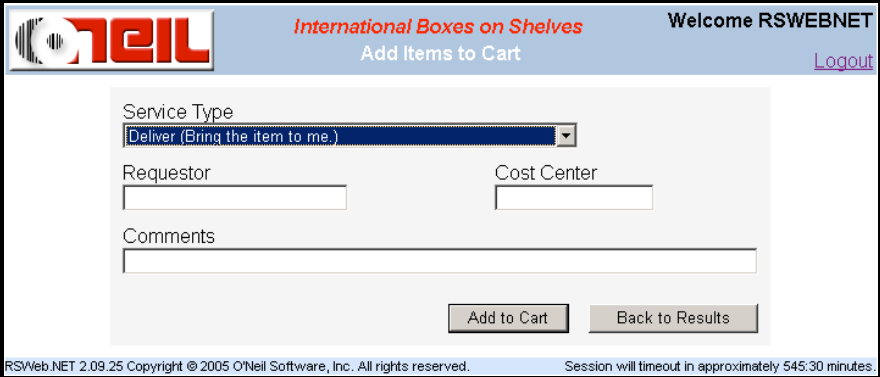
This option is used to edit existing items that have been loaded on the grid and selected for editing. It is described in detail later in this chapter.

Global Edit

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

Add to Cart

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



The screenshot shows a web application interface for adding items to a cart. At the top, there is a header with the O'Neil logo on the left, the text "International Boxes on Shelves" and "Add Items to Cart" in the center, and "Welcome RSWEBNET" and a "Logout" link on the right. The main form area contains a "Service Type" dropdown menu with "Deliver (Bring the item to me.)" selected. Below this are two text input fields: "Requestor" and "Cost Center". A larger text area labeled "Comments" is positioned below these fields. At the bottom of the form are two buttons: "Add to Cart" and "Back to Results". A footer at the very bottom of the page contains the text "RSWeb.NET 2.09.25 Copyright © 2005 O'Neil Software, Inc. All rights reserved." and "Session will timeout in approximately 545:30 minutes."

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

International Boxes on Shelves
Inventory Add to Cart Summary

Welcome RSWEBNET
[Logout](#)

[Print](#) [View Cart](#)

Font Size: 8pt

Inventory Add to Cart Summary

Service Type: Deliver (Bring the item to me.)
Requestor: Martha
Cost Center: 300

Barcode	Alternate Code	Description	Status
00001090	00001090ACXX		Added to cart successfully.
000010901	ALT000010901		Added to cart successfully.
200010	GAYLE		Added to cart successfully.
6543210			Added to cart successfully.
65432100			Added to cart successfully.
65432101			Added to cart successfully.
65432104			Added to cart successfully.
65432105			Added to cart successfully.
65432106			Added to cart successfully.
988965			Added to cart successfully.

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Click the View Cart link to view the items in the cart.

View Description

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

O'Neil University
Description View

Welcome RSWEBNET
[Logout](#)

[Print](#) [Back to Results](#)

Description View For Item 134514

Cancelled checks for 1999
Branch 532
<mailto:jsmith@bank.com>

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

- http
- www
- mailto

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

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

Click the Back to Results link to return to the Inventory grid.

View Contents

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

Print

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

Beachfront Storage
Print Selected Container Results
Welcome CAROL
[Logout](#)

[Print](#) [Back to Results](#)

Font Size

Container

Barcode	Alternate Code	Add Date	Destroy Date	Current Status	Status Date	Container Type	Account
200056		11/3/2003 1:31:18 PM	11/3/2006	In	7/14/2005 9:55:48 AM	CONTAINER	1000
333659		6/20/2005 8:33:18 AM		In	7/14/2005 9:55:48 AM	CONTAINER	1000
964-TW		9/23/2005 10:10:09 AM		In	9/23/2005 10:10:09 AM	CONTAINER	1000
215698		8/23/2005 3:45:26 PM		Pending	8/23/2005 3:45:26 PM	CONTAINER	1000
356982		9/13/2005 9:28:56 AM		Pending	9/13/2005 9:28:56 AM	CONTAINER	1000
985631		9/13/2005 9:54:39 AM		Pending	9/13/2005 9:54:39 AM	CONTAINER	1000

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

Choose Column Format

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

Beachfront Storage
Format Container Columns
Welcome CAROL
[Logout](#)

Please select a format for the grid columns from the list below.

Description

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

Results

Select All

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

Unselect All

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

Selection Summary

This option provides a line at the top of the grid that tells you the total number of items on the grid, how many are selected, and how many are not selected.

The screenshot shows the O'Neil Beachfront Storage Container management interface. At the top, it says "Beachfront Storage Container" and "Welcome CAROL". There is a "Logout" link. On the left, there is a navigation menu with options: Home, Intro, My Preferences, Inventory, Getting Started, Container, Filefolder, Tape, Order, Getting Started, Cart, and Orders Status. The main area shows a table with columns: Options, Results, and Search. Below the table, it says "Selected: 31 Unselected: 10 Total: 41". The table contains 20 rows of data with columns: Barcode, Alternat..., Add Date, Destroy D..., Current ..., Status Date, and Con. The footer of the page says "Page 1 of 1" and "RSWeb.NET 2.09.15 Copyright © 2005 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 19:45 minutes."

Options	Results	Search				
Selected: 31 Unselected: 10 Total: 41						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Barcode	Alternat...	Add Date	Destroy D...	Current ...	Status Date	Con
134502	PPP	4/21/2000 12:...	10/30/1999	In	7/14/2005 9:...	A
134503	148	4/21/2000 12:...	8/14/2001	In	7/14/2005 9:...	A
134514	140	4/23/2000 12:...	12/31/2003	In	7/14/2005 9:...	A
134515	141	4/23/2000 12:...	12/31/2003	In	7/14/2005 9:...	A
134517	143	4/23/2000 12:...	12/31/2003	Out	11/5/2003 3:...	A
134518	144	4/23/2000 12:...	12/31/2003	Out	1/21/2004 2:...	A
134520	160	4/23/2000 12:...	12/31/2003	Out	1/21/2004 2:...	A
134521	161	4/23/2000 12:...	12/31/2004	Out	9/2/2004 8:2...	A
134523	162	4/23/2000 12:...	12/31/2004	Out	1/28/2004 9:...	A
134524	164	4/23/2000 12:...	12/31/2004	Out	1/28/2004 9:...	A
134525	165	4/23/2000 12:...	12/31/2004	Out	11/3/2003 11...	A
134526	166	4/23/2000 12:...	12/31/2004	Out	9/2/2004 8:2...	A
134527	167	4/23/2000 12:...	12/31/2004	Out	11/4/2003 8:...	A
134528	168	4/23/2000 12:...	12/31/2004	Out	10/28/2003 1...	A
134529	169	4/23/2000 12:...	12/31/2004	Out	10/28/2003 1...	A
134701	154	4/22/2000 12:...	12/31/2003	Out	6/30/2004 3:...	A
134501	XXX	4/21/2000 12:...	8/14/2001	Perm Out	10/9/2002 1:...	A

Clear All

This option clears all items from the grid.

Clear Selected

This option clears only selected items from the grid.

Find / Find Next

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

The screenshot shows the O'Neil Beachfront Storage Container management interface with the "Container Find" option selected. It says "Beachfront Storage Container Find" and "Welcome CAROL". There is a "Logout" link. The main area contains a search form with the text "Please select a field and the value for finding the item." Below this, there is a dropdown menu with "Destroy Date" selected, and an empty text input field. There are two buttons: "Find" and "Back to Results". The footer of the page says "Page 1 of 1" and "RSWeb.NET 2.09.07 Copyright © 2005 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 19:30 minutes."

Click the drop down arrow to select the field you want to use, and then enter the value. For example, you may want to find all the items in your grid that have a certain destroy date. Select Destroy Date and then enter the date in the value field. Click **Find** to locate the item in the grid.

Beachfront Storage Container Welcome CAROL Logout

Options Results Search

Text found!

Barcode	Alternat...	Add Date	Destroy Date	Current Status	Status Date	Container
12 -ZX		9/23/2005 10:...		In	9/23/2005 10:...	CONTA
200056		11/3/2003 1:3...	11/3/2006	In	7/14/2005 9:...	CONTA
333659		6/20/2005 8:3...		In	7/14/2005 9:...	CONTA
455203		11/3/2003 1:3...		In	7/14/2005 9:...	CONTA
964-TW		9/23/2005 10:...		In	9/23/2005 10:...	CONTA
123659		8/23/2005 3:4...		Pending	8/23/2005 3:...	CONTA
215698		8/23/2005 3:4...		Pending	8/23/2005 3:...	CONTA
269856		9/13/2005 9:3...		Pending	9/13/2005 9:...	CONTA
356982		9/13/2005 9:2...		Pending	9/13/2005 9:...	CONTA
985631		9/13/2005 9:5...		Pending	9/13/2005 9:...	CONTA
134500	XYZ	4/21/2000 12:...	8/14/2001	In	7/14/2005 9:...	ARCHI
134502	PPP	4/21/2000 12:...	10/30/1999	In	7/14/2005 9:...	ARCHI
134503	148	4/21/2000 12:...	8/14/2001	In	7/14/2005 9:...	ARCHI
134514	140	4/23/2000 12:...	12/31/2003	In	7/14/2005 9:...	ARCHI
134515	141	4/23/2000 12:...	12/31/2003	In	7/14/2005 9:...	ARCHI
134517	143	4/23/2000 12:...	12/31/2003	Out	11/5/2003 3:...	ARCHI
134518	144	4/23/2000 12:...	12/31/2003	Out	1/21/2004 2:...	ARCHI

Page 1 of 1

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

Sort

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

Beachfront Storage Sort Container Results Welcome CAROL Logout

Please select a sort order from the list below

ACCT_ALT_CODE

Description
Account Code / Alternate Code

Submit Back to Results

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

Save to List

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

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

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

Search

Quick Search

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

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

Advanced Search

NOTE: You must install the Macromedia Flash Player in order to access the advanced query capabilities of RSWeb. The program can be downloaded free of charge from Macromedia's website.

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

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

In the Item Details section, you can define the criteria for your search. Click the drop 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.

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

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

Once you define your new query, all new results will be added to the existing results in the grid. If you do not want to keep the existing results, select **Results**, and then **Clear All** to remove them from the grid before conducting your new search.

Load from List

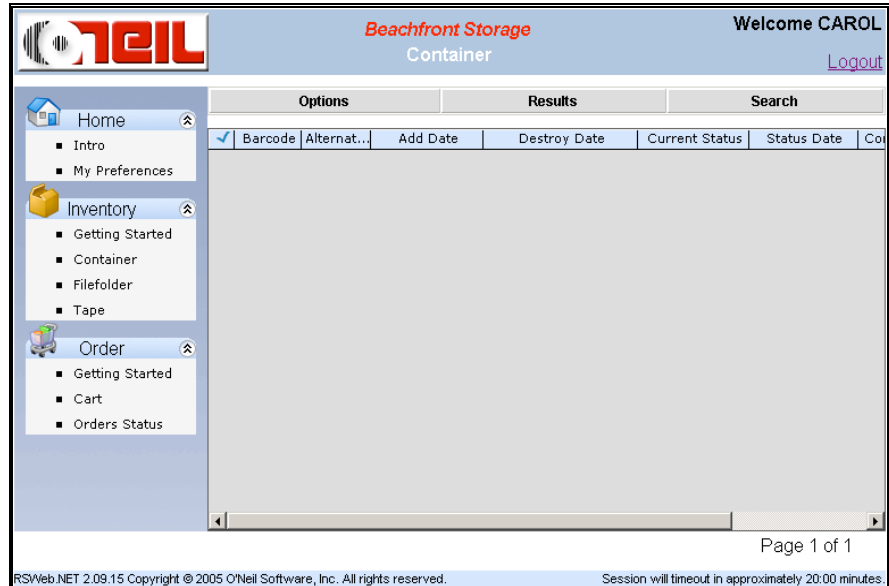
Once a list of items has been saved, it can be loaded again.

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

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

Containers

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



Add New Containers

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

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

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

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


Search for Existing Containers

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

Edit Existing Containers

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

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

		O'Neil University Container Edit			Welcome RSWEB Logout
Permanent Item *	Custom Field 1	Custom Field 2	Custom Field 3	Custom Field 4	Custom Date
No					
Category	Record Series	Set Name	Container Type	Current Status *	Status Date
			CONTAINER	In	11/12/2004
Add Date	11/12/2004				

Account *	Barcode *	Alternate Code
1000	1234550	
Contents Range Start	Contents Range End	Contents Start Date
Contents End Date	Description	Contents
Destroy Date		

Available Forms
 RSWeb.NET Container Edit Intermediate

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

Make your changes or enter new data in the appropriate fields and click **Submit** to return to the grid. Continue making necessary changes to any other containers. The changes you have entered are sent to the database at the record center.

Global Edit Containers

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

The screenshot shows a web form titled "O'Neil University Container Global Edit". The form is organized into several sections:

- Account *:** A text input field with a checkbox.
- Destroy Date:** A date input field with a checkbox.
- Contents Range Start:** A date input field with a checkbox.
- Contents Range End:** A date input field with a checkbox.
- Contents Start Date:** A date input field with a checkbox.
- Contents End Date:** A date input field with a checkbox.
- Custom Field 1:** A text input field with a checkbox.
- Custom Field 2:** A text input field with a checkbox.
- Custom Field 3:** A text input field with a checkbox.
- Custom Field 4:** A text input field with a checkbox.
- Custom Date:** A date input field with a checkbox.
- Category:** A dropdown menu with a checkbox.
- Record Series:** A text input field with a checkbox.
- Set Name:** A text input field with a checkbox.
- Description:** A text area with a checkbox.
- Contents:** A text area with a checkbox.

At the bottom of the form are three buttons: "Submit", "Reset Form", and "Back to Results". The footer of the page reads: "RSWeb.NET 2.09.27 Copyright © 2005 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 20:00 minutes."

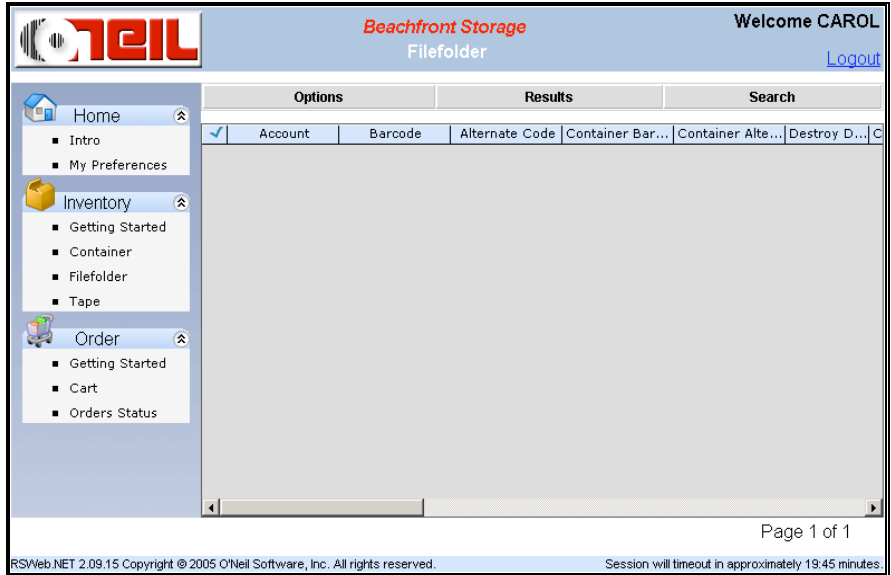
Because any information you enter in this dialog will affect more than one item, no container information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for a container.

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

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

Filefolders

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



Add New Filefolders

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

The screenshot shows the O'Neil Filefolder Add form. At the top, there is a navigation bar with the O'Neil logo, 'O'Neil University Filefolder Add', and 'Welcome RSWEB' with a 'Logout' link. The form has a light blue background. It starts with 'Current Status *' set to 'Pending'. Below are several input fields: 'Account *', 'Barcode *', 'Alternate Code', 'Short Description', 'Container Barcode', 'Contents Range Start', 'Contents Range End', 'Contents Start Date', 'Contents End Date', 'Description', and 'Contents'. At the bottom, there are three buttons: 'Submit', 'Reset Form', and 'Back to Results'. Below these buttons is an 'Available Forms' dropdown menu currently showing 'RSWeb.NET Filefolder Add Intermediate' and a 'Set As Default' button. The footer contains 'RSWeb.NET 2.09.27 Copyright © 2005 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 19:45 minutes.'

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

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

Search for Existing Filefolders

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

Edit Existing Filefolders

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

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

The screenshot shows a web form for editing filefolder information. The header includes the O'Neil University logo, the text 'O'Neil University Filefolder Edit', and a user greeting 'Welcome RSWEB' with a 'Logout' link. The form fields are organized into two columns:

- Account ***: 2000, 1045
- Barcode ***: 0000008
- Alternate Code**: 1123448
- Short Description**: (empty)
- Container Barcode**: 134613
- Container Alternate Code**: AU-213
- Contents Range Start**: (empty)
- Contents Range End**: (empty)
- Contents Start Date**: (empty)
- Contents End Date**: (empty)
- Description**: (empty text area)
- Contents**: (empty text area)
- Custom Field 1**: (empty)
- Custom Field 2**: (empty)
- Custom Field 3**: (empty)
- Custom Field 4**: (empty)
- Custom Date**: (empty)
- Category**: (empty)
- Record Series**: (empty)
- Set Name**: (empty)
- Destroy Date**: (empty)
- Permanent Item ***: No
- Current Status ***: In
- Status Date**: 3/14/2005
- Add Date**: 4/24/2000

At the bottom of the form, there are three buttons: 'Submit', 'Reset Form', and 'Back to Results'. Below these buttons is an 'Available Forms' dropdown menu with 'RSWeb.NET Filefolder Edit Intermediate' selected and a 'Set As Default' button. The footer contains the text 'RSWeb.NET 2.09.27 Copyright © 2005 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 19:45 minutes.'

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

Make your changes or enter new data in the appropriate fields and click **Submit** to return to the grid. Continue making necessary changes to any other filefolders. The changes you have entered are sent to the database at the record center.

Global Edit Filefolders

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

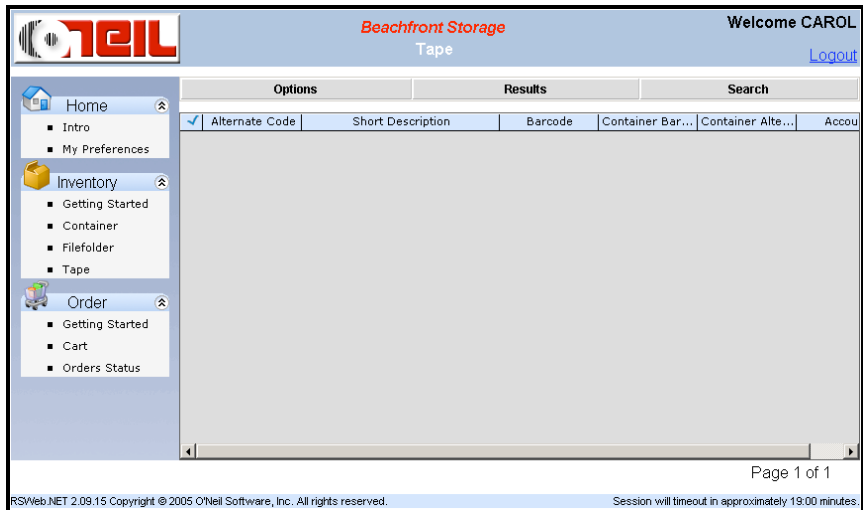
Because any information you enter in this dialog will affect more than one item, no filefolder information is displayed. Proceed with caution. It is easy to inadvertently delete or change information already entered for a filefolder.

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

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

Tapes

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



Add New Tapes

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

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

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

Search for Existing Tapes

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

Edit Existing Tapes

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

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

Custom Field 1	Custom Field 2	Custom Field 3	Custom Field 4	Custom Date	Category

Contents Range Start	Contents Range End	Tape Type	Contents	Description	Record Series
		TAPE			

Permanent Item *	Add Date	Current Status *	Status Date
No	10/5/2004	In	10/5/2004

Account *
1000 \ \

Barcode *
00000001

Alternate Code

Short Description

Container Barcode

Container Alternate Code

Set Name

Contents Start Date

Contents End Date

Destroy Date

Submit Reset Form Back to Results

Available Forms
RSWeb.NET TAPE Edit Intermediate *
Set As Default

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

Make your changes or enter new data in the appropriate fields and click **Submit** to return to the grid. Continue making necessary changes to any other tapes. The changes you have entered are sent to the database at the record center.

Global Edit Tapes

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

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

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

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

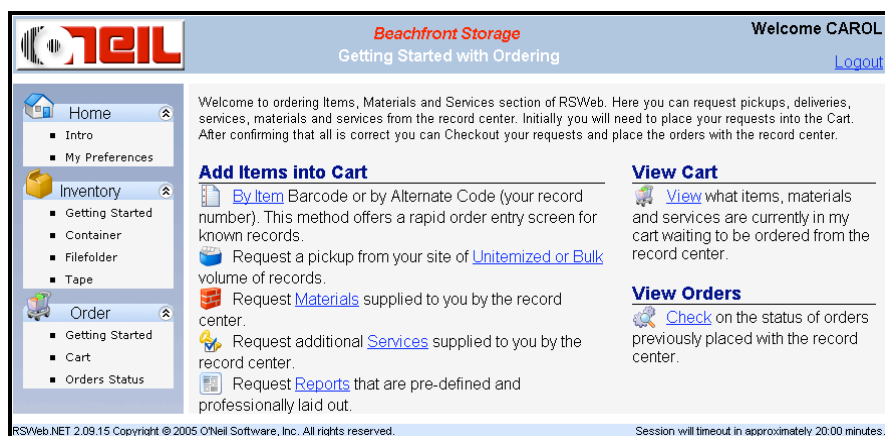
Order

Introduction

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

Getting Started

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



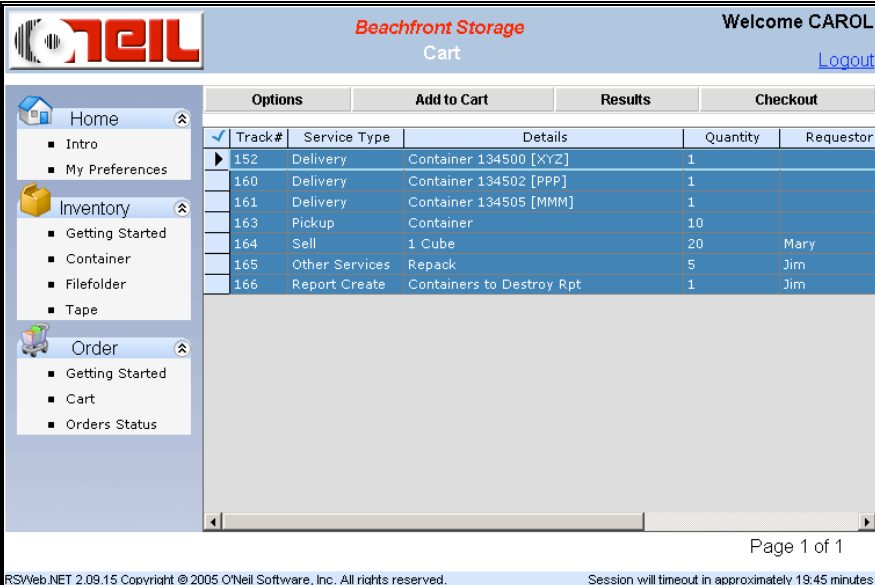
Cart

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

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

Add Items to Cart

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



Options	Add to Cart	Results	Checkout		
Track#	Service Type	Details	Quantity	Requestor	
<input checked="" type="checkbox"/>	152	Delivery	Container 134500 [XYZ]	1	
<input type="checkbox"/>	160	Delivery	Container 134502 [PPP]	1	
<input type="checkbox"/>	161	Delivery	Container 134505 [MMM]	1	
<input type="checkbox"/>	163	Pickup	Container	10	
<input type="checkbox"/>	164	Sell	1 Cube	20	Mary
<input type="checkbox"/>	165	Other Services	Repack	5	Jim
<input type="checkbox"/>	166	Report Create	Containers to Destroy Rpt	1	Jim

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

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

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

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

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

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

Items

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

Enter Items

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

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

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

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

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

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

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

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

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

RSWeb and the RS-SQL software that your record center uses identify account in three levels. The Level 1 Account usually refers to your company. The Level 2 Account usually refers to a department within your company. Then within departments, RSWeb can identify a third level, perhaps a cost center, with the Level 3 Account. Your record center may not use all three levels.

If you only enter the Alt Code, there may be more than one item that matches the Alt Code. In this case, the software looks for a possible match. If there is more than one item found for the Alt Code, a link titled 'Select items to add' is displayed to the right

of the row. Click the link to go to the Item Entry Verification page to select the items to add to the cart. For more information, see the *Item Entry Verification* section later in this chapter.

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

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

When all items have been entered, click **Add to Cart** to add the items to the cart. You receive a confirmation at the top of screen telling you how many items were added to the cart.

The screenshot shows the 'Beachfront Storage Items Entry' web interface. At the top, there is a logo for 'ONEIL' and a 'Welcome CAROL' message with a 'Logout' link. A green message at the top center reads '3 item(s) added to cart.' Below this, there are several input fields: 'Service Type' (dropdown menu with 'Deliver (Bring the item to me.)' selected), 'Item Type' (dropdown menu with 'Container' selected), 'Entry Type' (dropdown menu with 'Barcode' selected), 'Requestor' (text field with 'Mary'), and 'Cost Center' (text field with '300'). There is also a 'Comments' text area. Below these fields is a 'Barcode' section with six rows, each containing a small input field. At the bottom of the form are three buttons: 'Add to Cart', 'Clear Items', and 'Back to Cart'. The footer of the page contains the text 'RSWeb.NET 2.09.15 Copyright © 2005 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 19:30 minutes.'

A message displays at the top of the screen indicating how many items were added to the cart. Click **Back to Cart** to return to the cart.

If an item cannot be added to the cart, a specific red message or link is displayed to the right of the entry row and a general error message is displayed at the top of the page.

1 item(s) added to cart. Some items not resolved. See below for details.

Service Type
 Deliver (Bring the item to me.)

Item Type
 Container

Entry Type
 Barcode

Requestor
 Mary

Cost Center
 300

Comments

Barcode

1	126695	Item not found.
2		
3		
4		
5		
6		

Add to Cart Clear Items Back to Cart

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Click **Clear Items** to clear the entry and error message. Click **Back to Cart** to return to the cart.

Item Entry Verification

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

Some items not resolved. See below for details.

Service Type
Deliver (Bring the item to me.)

Item Type: Container Entry Type: Alt Code

Requestor: Mary Cost Center: 300

Comments

Alt Code	Account
1 xyz	\ \
2	\ \
3	\ \
4	\ \
5	\ \
6	\ \

Select items to add

Add to Cart Clear Items Back to Cart

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

Please select the items to add for alternate code xyz.

Add	Barcode	Item Description	Account	Account Name
<input type="checkbox"/>	134500		1000	Newport Bank
<input type="checkbox"/>	015120		2000	Insurance Company
<input type="checkbox"/>	800006		CITYHOSP\EXEC	

Print Page Back Add to Cart

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All items with the matching Alt Code display. Select the check box in the Add column next to the item or items you want to add. Click **Add to Cart** to add the selected item to the cart and return to the Items Entry screen.

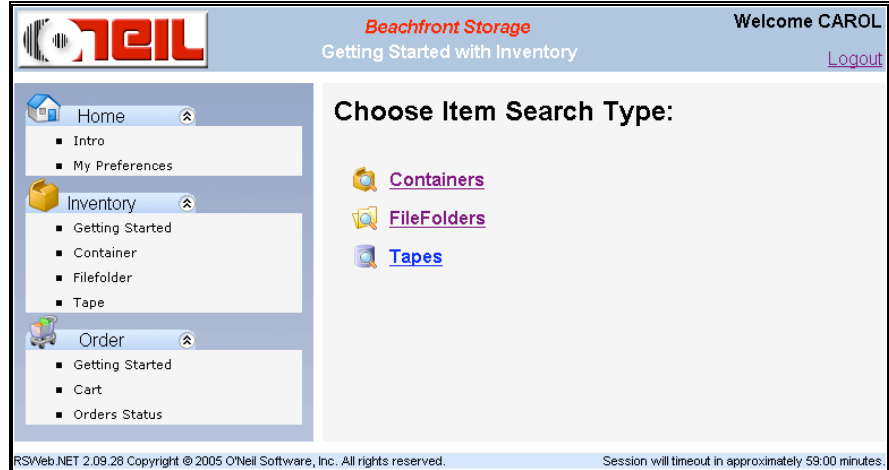
NOTE: Only items belonging to accounts you have access to are displayed.

Search & Select

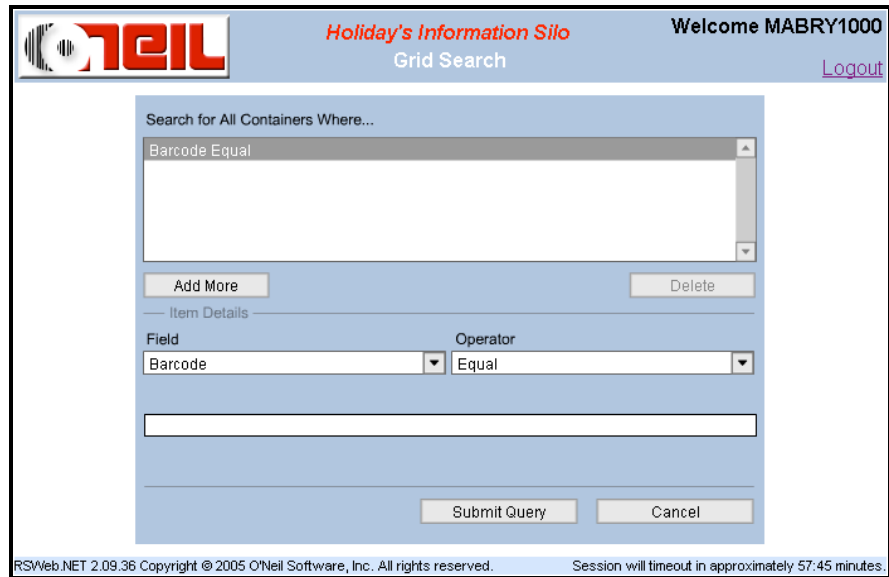
NOTE: You must install the Macromedia Flash Player in order to access the advanced query capabilities of RSWeb. The program can be downloaded free of charge from Macromedia's website.

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

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



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



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

In the Item Details section, you can define the criteria for your search. Click the drop 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.

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

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

Once you define your new query, all new results will be added to the existing results in the grid. If you do not want to keep the existing results, select **Results**, and then **Clear All** to remove them from the grid before conducting your new search.

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

Load from File

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

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

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

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

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

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

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

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

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

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

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

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

A dialog appears telling you how many items were successfully added to the cart and if any errors occurred.

10 item(s) added to cart. The following error(s) occurred.

Item not found. Barcode: 5326
Item not found. Barcode: 98564

Print Page Cancel

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Click **Print Page** to print out this page to use as a reference in researching the error. Click **Cancel** to close the dialog. If errors occurred, you are returned to the File Upload dialog so you can correct any mistakes. If no errors were found, you are taken directly to the cart.

Options	Add to Cart	Results	Checkout
<input checked="" type="checkbox"/>	Track#	Service Type	Details
	Quantity		
	173	Delivery	Container 134506 [151]
	174	Delivery	Container 134507 [152]
	175	Delivery	Container 134509 [135]
	176	Delivery	Container 134510 [136]
	177	Delivery	Container 134511 [137]
	178	Delivery	Container 134512 [138]
	179	Delivery	Container 134513 [139]
	180	Delivery	Container 134610 [AU-210]
	181	Delivery	Container 134504 [TTT]
	182	Delivery	Container 134505 [MMM]
	183	Delivery	Container 134506 [151]
	184	Delivery	Container 134507 [152]
	185	Delivery	Container 134509 [135]
	186	Delivery	Container 134510 [136]
	187	Delivery	Container 134511 [137]
	188	Delivery	Container 134512 [138]
	189	Delivery	Container 134513 [139]
	190	Delivery	Container 134610 [AU-210]

Page 1 of 1

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The items in your file have been added to the cart and are selected so they are easily identifiable.

Bulk Items

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

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

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

Quantity: Enter the number of containers, filefolders, and tapes that are going to the record center. This allows the record center to make sure they have enough space in the truck. If you are dropping the items off at the record center, they may need to plan how much assistance you will need. The maximum quantity allowed is determined by your record center. If you enter a number larger than the maximum, the field is changed to the maximum quantity and an error message displays at the top of the page.

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

Materials

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

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

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

Quantity: Enter the quantity you are requesting

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

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

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

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

Services

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

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

The screenshot shows a web interface for ordering services. At the top left is the O'Neil logo. The header text reads 'Beachfront Storage Other Services' and 'Welcome CAROL' with a 'Logout' link. The main form area contains the following fields: 'Item Type' (a dropdown menu with 'Fax Per Page' selected), 'Quantity' (a text box with '1'), 'Requestor' (a text box), 'Cost Center' (a text box), and 'Comments' (a large text area). At the bottom of the form are two buttons: 'Add to Cart' and 'Back to Cart'. The footer contains the text: 'RSWeb.NET 2.09.07 Copyright © 2005 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 20:00 minutes.'

Item Type: Click the drop down arrow to select the type of service you are requesting.

Quantity: Enter the quantity.

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

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

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

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

Reports

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

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

The screenshot displays the O'Neil Beachfront Storage Report Services web interface. At the top left is the O'Neil logo. The top center features the text "Beachfront Storage Report Services". At the top right, it says "Welcome CAROL" with a "Logout" link. The main content area contains a form with the following fields: "Report Type" (a dropdown menu currently showing "Containers to Destroy Rpt"), "Report Profile" (a dropdown menu with "Defaults" and "Destroy Dates" options), "Requestor" (a text input field), "Cost Center" (a text input field), and "Comments" (a text area). At the bottom right of the form are two buttons: "Next" and "Back to Cart". The footer of the page contains the text "RSWeb.NET 2.09.07 Copyright © 2005 O'Neil Software, Inc. All rights reserved." and "Session will timeout in approximately 20:00 minutes."

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

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

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

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

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

When you have finished entering information, click **Next**.

The Report 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.

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

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

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

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

Select the Summary Only check box to print summary information. Select the Print Descriptions check box to include all data in the 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.

Report Options: 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 Report Columns screen appears.

If a Title was entered in the previous screen, it appears at the top of this screen.

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

Sort Order: In the Sort Order section, you can set your report to sort in any order you like, with certain limits. If there are predetermined sort criteria, the first couple fields are filled in and you 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.

NOTE: If a customized query has not been assigned by your record center, this screen will not appear and you can click **Add to Cart** to add the report to the cart.

Enter the required data and click **Add to Cart**. The report request is added to the cart.

Edit Items in Cart

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

The screenshot shows the 'Edit Cart Item' page. At the top left is the 'oneil' logo. The top navigation bar contains 'International Boxes on Shelves', 'Edit Cart Item', and 'Welcome RSWEBNET'. A 'Logout' link is in the top right. The main content area features a table with the following details:

Tracking Number: 650
Add Date: Thursday, August 04, 2005 at 8:34:05 AM
Service Type: Pickup
Detail: Container

Below the table are several input fields: 'Quantity' with a spinner control showing '10', 'Requestor' (text box), 'Cost Center' (text box), and 'Comments' (text area). At the bottom right are 'Update' and 'Back to Cart' buttons. The footer contains 'RSWeb.NET 2.09.25 Copyright © 2005 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 546:00 minutes.'

Information regarding the item displays at the top of the screen. This information is read-only. You can edit the Quantity, Requestor, Cost Center, and Comments fields.

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

When you have made your changes, click **Update**. Click **Back to Cart** to return to the cart.

View Details of Items in Cart

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

	<i>International Boxes on Shelves</i>	Welcome RSWEBNET
Cart Detail		Logout
Print Back to Results		
Cart Detail		
Tracking Number: 822		
Status: Cart	Add Date: Thursday, October 13, 2005 at 9:55:59 AM	
Service Type: Delivery		
Detail: Container 00001090 [00001090ACXX]		
Quantity: 1		
Requestor: Martha	Cost Center: 300	
Customer Comment:		
Record Center Comment:		
RSWeb.NET 2.09.25 Copyright © 2005 O'Neil Software, Inc. All rights reserved.		Session will timeout in approximately 546:00 minutes.

To return to the cart, click the Back to Results link.

Create Order/Workorder

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

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

Create an Order

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

Beachfront Storage Welcome CAROL
Cart [Logout](#)

Options Add to Cart Results Checkout

Track#	Service Type	Details	Quantity
152	Delivery	Container 134500 [XYZ]	1
160	Delivery	Container 134502 [PPP]	1
161	Delivery	Container 134505 [MMM]	1
163	Pickup	Container	10
164	Sell	1 Cube	20
165	Other Services	Repack	5
166	Report Create	Containers to Destroy Rpt	1
167	Delivery	Container 134506 [151]	1
168	Delivery	Container 134507 [152]	1
169	Delivery	Container 134509 [135]	1
170	Delivery	Container 134511 [137]	1
171	Delivery	Container 134504 [TTT]	1
172	Delivery	Container 134505 [MMM]	1
173	Delivery	Container 134506 [151]	1
174	Delivery	Container 134507 [152]	1
175	Delivery	Container 134509 [135]	1
176	Delivery	Container 134510 [136]	1

Page 1 of 1

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

Beachfront Storage Welcome CAROL
Submit Orders [Logout](#)

Workorder Account
1000

Contact
Jane Hutter

Address Line 1
1234 Park Ave.

Address Line 2
New York, NY 11232

Address Line 3

Phone
212-555-3242

Fax
212-555-3255

Use default delivery address

Use the same account and address the next time an order is created

Service Priority
[Dropdown]

Required By Date/Time
[Field]


Submit Orders Back to Cart

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Enter your account number and your contact information. To use the default address for the account entered, click **Use default delivery address**. If you want to use the same account and address the next time you create an order, select the check box below the address fields.

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

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



Beachfront Storage

Order Summary

Welcome CAROL

[Logout](#)

Order Summary

Ordered By: CAROL on Tuesday, October 04, 2005 at 9:47:17 AM
Required By: Tuesday, October 04, 2005 11:47:09 AM
Batch Order Number: 83

Workorder Account: 1000

Jane Hutter
 1234 Park Ave.
 New York, NY 11232
 Phone: 212-555-3242
 Fax: 212-555-3255

Order Detail

Track#	Service Type	Details	Qty	Requestor	Cost Center
167	Delivery	Container 134506 [151]	1	Mary	300
168	Delivery	Container 134507 [152]	1	Mary	300
169	Delivery	Container 134509 [135]	1	Mary	300
170	Delivery	Container 134511 [137]	1	Mary	300
171	Delivery	Container 134504 [TTT]	1		
172	Delivery	Container 134505 [MMM]	1		

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

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

Create a Workorder

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

The screenshot shows the O'Neil software interface. At the top, it says "Beachfront Storage" and "Cart". The user is identified as "Welcome CAROL". There is a "Logout" link. On the left, there is a navigation menu with "Home", "Inventory", and "Order" sections. The main area is a table with the following data:

Options	Add to Cart	Results	Checkout
Track#	Service Type	Details	Quantity
152	Delivery	Container 134500 [XYZ]	1
161	Delivery	Container 134505 [MMM]	1
164	Sell	1 Cube	20
165	Other Services	Repack	5
166	Report Create	Containers to Destroy Rpt	1
173	Delivery	Container 134506 [151]	1
174	Delivery	Container 134507 [152]	1
175	Delivery	Container 134509 [135]	1
176	Delivery	Container 134510 [136]	1
177	Delivery	Container 134511 [137]	1
178	Delivery	Container 134512 [138]	1
179	Delivery	Container 134513 [139]	1
180	Delivery	Container 134610 [AU-210]	1
181	Delivery	Container 134504 [TTT]	1
182	Delivery	Container 134505 [MMM]	1
183	Delivery	Container 134506 [151]	1
184	Delivery	Container 134507 [152]	1

At the bottom, it says "Page 1 of 1" and "RSWeb.NET 2.09.15 Copyright © 2005 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 19:45 minutes."

From the **Checkout** menu, select **Workorder**. If any of the items you are adding to the cart belong to a set of items, the following message appears.

The screenshot shows a message box titled "Create Workorder Options" with the text "97 item(s) belong to the same set as selected items in the cart." Below this, it says "Please choose one of the following options:" followed by three radio button options:

- Add item(s) in set to cart and go back to cart so that you can review.
- Add item(s) in set to workorder and continue with workorder creation.
- Do not add item(s) in set to workorder and continue with workorder creation.
- Cancel workorder creation and go back to cart.

A "Submit" button is located at the bottom right. At the bottom of the window, it says "RSWeb.NET 2.10.215 BETA. Copyright © 2006 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 20:00 minutes."

Select one of the three available options.

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

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

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

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

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

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

The screenshot shows a web form titled "Create Workorder" for "Beachfront Storage". The user is logged in as "CAROL". The form contains the following fields and sections:

- Workorder Account:** A text field containing "1000".
- Contact:** A text field containing "Jane Hutter".
- Address Line 1:** A text field containing "1234 Park Ave."
- Address Line 2:** A text field containing "New York, NY 11232".
- Address Line 3:** An empty text field.
- Phone:** A text field containing "212-555-3242".
- Fax:** A text field containing "212-555-3255".
- Service Priority:** A dropdown menu.
- Required By Date/Time:** A text field.
- Authorization (optional):** A section with three text fields: "First Name", "Last Name", and "Password".
- Buttons:** "Use default delivery address" (highlighted), "Create Workorder", and "Back to Cart".
- Checkbox:** A checked checkbox labeled "Use the same account and address the next time an order is created".

At the bottom of the page, there is a footer: "RSWeb.NET 2.09.15 Copyright © 2005 O'Neil Software, Inc. All rights reserved." and "Session will timeout in approximately 20:00 minutes."

Enter your account number and your contact information. To use the default address for the account entered, click **Use default delivery address**. If you want to use the same account and address the next time you create a workorder, select the check box below the address fields.

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

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

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

Ordered By: CAROL on Tuesday, October 04, 2005 at 10:40:10 AM
Required By: Saturday, October 08, 2005 12:00:00 AM
Batch Order Number: 86

Workorder Account: 1000
 Jane Hutter
 1234 Park Ave.
 New York, NY 11232
 Phone: 212-555-3242
 Fax: 212-555-3255

Track#	Workorder	Service Type	Details	Qty	Requestor	Cost Center
164	00000260	Sell	1 Cube	20	Mary	

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

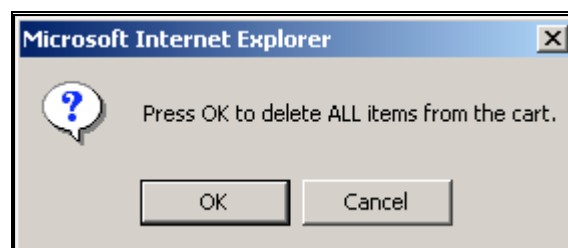
The items have been removed from the cart, and the workorders have been sent to the record center. They will process the workorders and fulfill your request.

Remove Items from Cart

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

Remove All Rows

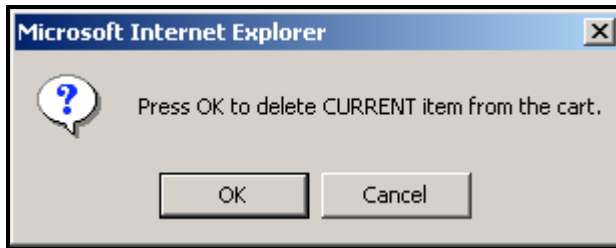
To remove all items in the cart, from the **Results** menu, select **Remove All Rows**. The following prompt appears.



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

Remove Current Row

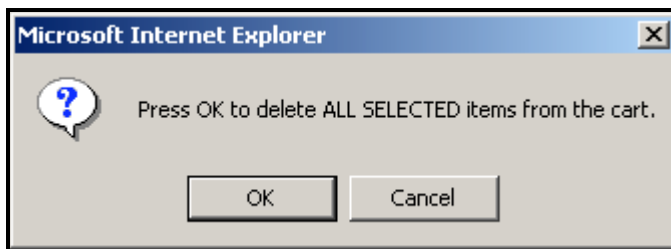
To remove only the item that is currently selected, from the **Results** menu, select **Remove Current Row**. The following prompt appears.



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

Remove Selected Rows

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

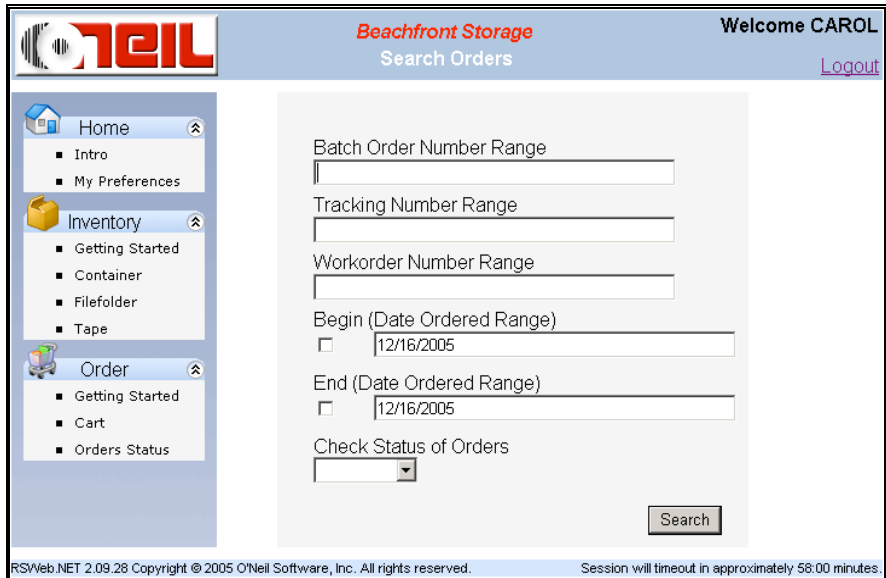


Click **OK** to remove all selected items. Any unselected items remain in the cart. Click **Cancel** if you change your mind and do not want to remove the items from the cart.

Order Status

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

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



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

Searching by Batch Number Range

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

<p>Batch Order Number Range</p> <input type="text" value="133, 132, 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.

Searching by Tracking Number Range

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

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

Searching by Workorder Number Range

Searching by workorder number works exactly the same as searching by batch or tracking number. To search for orders by workorder number, you can enter a single workorder number, more than one workorder number, a range of workorder numbers, or a combination. Multiple numbers can be separated by a comma or dash.

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

Searching by Date Range

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

Searching by Status

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

Submitted

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

Scheduled

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

Workorder

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

Fulfilled

Your order has been fulfilled.

On Hold

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

Cancelled

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

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

Combining Search Criteria

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

Search Results


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

Options		Results		Search		
Batch...	Track...	Service Type	Details	Quant...	Status	Status Date
64	131	Sell	Check Box	10	Submitted	9/12/2005
60	132	Pickup	Filefolder	20	Submitted	9/12/2005
62	133	Report Create	Contracts Expi...	1	Submitted	9/12/2005
63	134	Other Services	Repack	20	Submitted	9/12/2005
61	135	Other Services	Fax Per Page	3	Workorder	9/12/2005
78	136	Sell	1 Cube	10	Submitted	9/19/2005
65	137	Sell	2 Cube	5	Submitted	9/12/2005
78	138	Sell	Check Box	10	Submitted	9/19/2005
79	139	Pickup	Container	10	Workorder	9/19/2005
67	140	Sell	Check Transfe...	5	Submitted	9/12/2005
78	141	Sell	Empty X-Ray ...	100	Submitted	9/19/2005
66	142	Sell	Tape Storage ...	5	Submitted	9/12/2005
78	143	Sell	Turtle Tote	5	Submitted	9/19/2005
69	144	Sell	1 Cube Lids	5	Submitted	9/12/2005
81	145	Other Services	Fax Per Page	3	Workorder	9/20/2005
74	146	Other Services	Labor	5	Workorder	9/16/2005
68	147	Other Services	Repack	10	Workorder	9/12/2005

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


		<i>International Boxes on Shelves</i>		Welcome RSWEBNET	
		Order Detail		Logout	
Print Back to Results					
Order Detail					
Batch Order Number: 225		Tracking Number: 832			
Ordered By: RSWEBNET on Thursday, October 13, 2005 at 10:20:47 AM					
Status: Submitted		Status Date: Thursday, October 13, 2005 at 10:20:47 AM			
Service Type: Pickup					
Required By: Friday, October 14, 2005 at 12:00:00 PM					
Workorder Account: 3000					
Delivery Address:					
Kate Sampson 432 5th Avenue 2ND Floor New York, NY 11821 Phone: 212-343-9489 Fax: 212-343-9490					
Detail: Container					
Quantity: 10					
Requestor:			Cost Center:		
Customer Comment:					
Record Center Comment:					
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Click the Back to Results link to return to the Order Status grid.


Retrieving a Web Report

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

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

		Beachfront Storage Order Detail	Welcome CAROL Logout
Print Back to Results			
Order Detail			
Batch Order Number: 62		Tracking Number: 133	
Ordered By: CAROL on Monday, September 12, 2005 at 9:52:52 AM			
Status: Submitted		Status Date: Monday, September 12, 2005 at 9:52:52 AM	
Service Type: Report Create			
Required By: Monday, September 12, 2005 at 9:52:52 AM			
Workorder Account: 1000			
Your report is not yet complete. The link will appear here once your order has been fulfilled.			
Criteria:			
Report Type: Contracts Expiring Rpt			
Report Criteria:			
cost_center:			
requestor: Cathie			
BottomMargin: 0.0			
RightMargin: 0.0			
LeftMargin: 0.0			
TopMargin: 0.0			
Orientation: Portrait			
Title: Contracts Expiring in September			
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If your report has been completed, the criteria displays along with instructions on how to access and save the report.

		Beachfront Storage Order Detail	Welcome CAROL Logout
Print Back to Results			
Order Detail			
Batch Order Number: 42		Tracking Number: 111	
Ordered By: CAROL on Monday, February 09, 2004 at 3:11:52 PM			
Status: Fulfilled		Status Date: Monday, February 09, 2004 at 3:15:24 PM	
Service Type: Report Create			
Required By: Monday, February 09, 2004 at 12:00:00 AM			
Workorder Account: 1000			
<p>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.</p> <p>Download your report</p>			
Criteria:			
Report Type: Acct Transaction Rpt			
Report Criteria:			
<pre> acct_number: 1000 cost_center: requester: Cathie BottomMargin: 0.0 RightMargin: 0.0 LeftMargin: 0.0 TopMargin: 0.0 Orientation: Portrait requestByDay: 9 requestByMonth: 2 requestByYear: 2004 Title: Cathie's Report Font Face: Courier Font Size: 12pt. </pre>			
<small>RSWeb.NET 2.09.07 Copyright © 2005 O'Neil Software, Inc. All rights reserved.</small>		<small>Session will timeout in approximately 20:00 minutes.</small>	

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).

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



Free downloads that will help you use RSWeb.NET



[Microsoft Internet Explorer](#)



[Adobe Acrobat Reader](#)

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