



Version 4.0.0.4

# User Guide

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# Chapter 1 – Overview

## Welcome

Welcome to Archive Manager, the leading-edge commercial record management system for record centers of all sizes.

Based decades of record management experience, and featuring leading-edge Microsoft .NET and Microsoft SQL technologies, Archive Manager provides record centers with the powerful and flexible tools they need to manage and grow their business.

Archive Manager is a functionally complete software package as delivered. Record Management Software, Inc. does not levy a “per-transaction tariff” to Archive Manager users.

For complete pricing details, see <http://recordmanagementsoftware.com/wp/archive-manager>

Optional components include:

- Voice prompted bar code scanner
- Web Access Module
- Web based Client Data Entry software
- Multiple-user versions
- Bridge software to accounting systems other than QuickBooks

### ARCHIVE MANAGER FEATURES

- A full-featured security module protects and controls access to the system.
- Concurrent multiple open windows for easy switching between tasks.
- User groups allow assignment of personalized access rights to any screen.
- Quick access to box-size, media, location and billing management speeds information entry and retrieval.
- Customer data entry at a single screen is simple and quick. Clients can be associated with any number of contacts and departments.
- Billing can be entered either manually or automatically per action.
- The optional Web Access Module allows clients to access their accounts via the Internet 24 x 7, to lookup and checkout from their holdings, print reports, and order supplies. Users may be limited to one department or may view all items.
- An optional Web-based Data Entry Module allows clients to enter new boxes and folders into the Archive Manager system over the Internet. Boxes and folders arrive at the warehouse with data already recorded in the system.
- Customer and billing information can be exported to QuickBooks (or by special order, to most other accounting systems). All charges including the monthly storage charges are computed monthly or daily to invoices that can be exported.
- Contract information is retrieved at the click of a button.
- A Quick Lookup facility puts important, often used information at your fingertips.
- A comprehensive audit trail keeps a complete history of each box and folder.
- A convenient report generator provides hundreds of useful reports with a built in PDF generator.
- Save-and-reuse action lists save time and effort.
- The optional portable bar code reader is voice-prompted to simplify use. It speeds box, folder and shelf handling, enhances data accuracy, and permits flexible editing of data prior to updating the database.

# Navigating in Archive Manager

## THE MENU BAR



Fig. 1

Navigation in Archive Manager will be intuitive for anyone accustomed to standard Windows software. When the application is initialized, the default screen appears. There is a Menu Bar situated at the top, as usual, where menu items are selected with a left-mouse click. Most of Archive Manager's features can be accessed from the Menu Bar, but you will find that there are usually quicker ways of accessing the more often-used ones.

## THE ACTIVITY PANE

Icons in the Activity Pane to the left of the Archive Manager screen, provide quick access to often used features and activities, including menu choices, quick searching, and the currently-open window. Any item may be accessed with a single mouse-click.

## THE SHORTCUTS PANEL

The Shortcuts Panel (Fig. 2) appears by default when Archive Manager is initialized. Click any icon to jump to its associated activity.

- **Audit Trail** – The Audit Trail feature tracks activity history for boxes and folders – discussed in Chapter 10.
- **Quick Search** – Find is a search utility for quick retrieval of box, folder, location, and customer information – discussed in Chapter 9.
- **Billing** – The Billing Screen is used for entry and display of customer charges – discussed in Chapter 11.
- **Reports** – The Reports Module is used for selection and customization of reports – discussed in Chapter 14.
- **Import** – The Import Screen contains all functions for importing and exporting client data – discussed in Chapter 17.
- **Business Status** – The Business Status Applet displays the current number of boxes, folders, clients, and permanent (box) labels, and displays the Next box # (Fig. 3).

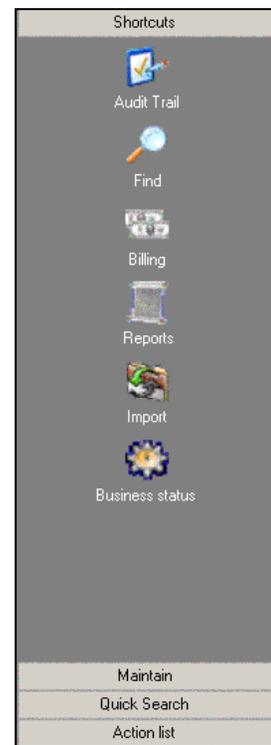


Fig. 2

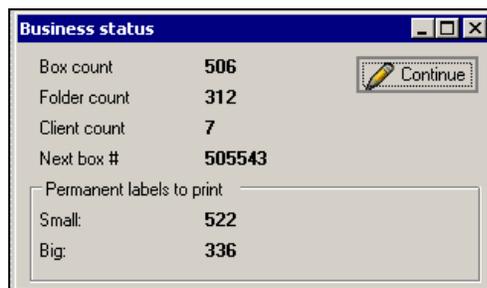


Fig. 3

## THE MAINTAIN PANEL

Clicking the **Maintain Tab** in the Activity Pane causes the Maintain Panel to appear (*right*), with the following icons:

- **Boxes** – Screen for management and display of box information. Discussed in *Chapter 5*.
- **Folders** – Screen for management and display of folder information. Discussed in *Chapter 6*.
- **Tapes** - Screen for management and display of box information. Discussed in *Chapter 7*.
- **Clients** – Screen for management and display of customer information. Discussed in *Chapter 3*.
- **Record Titles** – discussed in *Chapter 4*.
- **Lists** – discussed in *Chapter 7*.
- **Orders** - discussed in *Chapter 8*.
- **Locations** - discussed in *Chapter 2 Getting Started*.

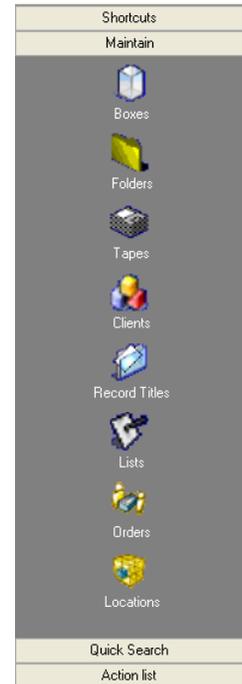


Fig. 4

## THE QUICK SEARCH PANEL

Clicking the Quick Search Tab in the Activity Pane brings up the Quick Search Panel, which allows quick retrieval of information about boxes, folders, locations, and customers. It is discussed in *Chapter 8*.

Fig. 5

## THE ACTION LIST PANEL

Clicking The **Action List Tab** puts the all the Menu Bar functions into the Activity Pane. Double clicking an item here is the same as selecting it from the Menu Bar.

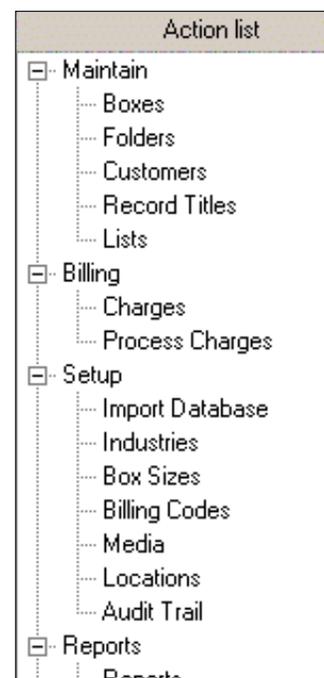


Fig. 6

## THE OPEN WINDOWS PANEL

The last item in the Activity Pane is the Open Windows Panel. This area lists the names of each currently open window. In Fig. 7, below, the Charges, Maintain Clients and Maintain Boxes Screens are open. A single click on any name will activate the corresponding window. If you are entering charges, for example, and need to look up a box number, you can just toggle windows and never lose your place.

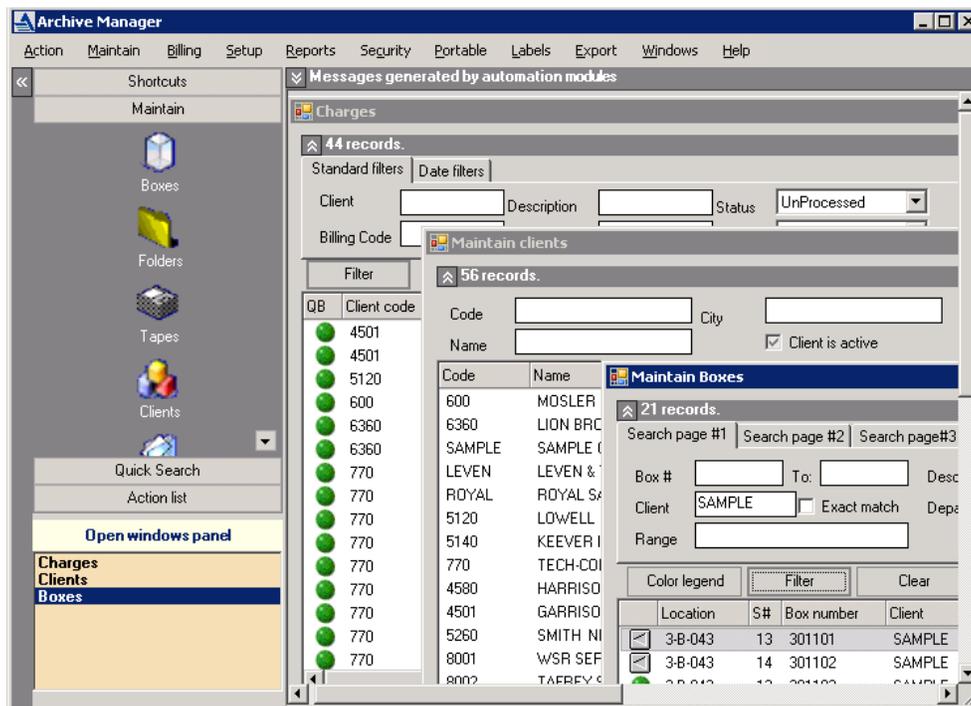


Fig. 7

## FILTERING

Situated at the top of most Archive Manager screens are multiple filters, which you can use to limit the data displayed on the screen to the information you want for each field. These filters can be used singly or in conjunction to perform a search.

In the Sample database's Box Screen, for example, if you enter **ROYAL** in the Client field, only boxes belonging to ROYAL are displayed. If **5-O-018** is then entered in the Location field, ROYAL's Box # 763830 is displayed. Any additional ROYAL boxes that are placed in this Location would also be displayed.

The wildcard character is %, meaning "accept any value". It may be used in any part of a query.

## SORTING

Click the bar at the top of a column of data (in any screen) to sort the display in ascending order. Click again to reverse the order.

## WINDOWS CONVENTIONS

Archive Manager uses standard Windows conventions regarding the mouse and keyboard shortcuts: right-clicking on most items brings up an action menu.

At the upper left of any screen containing a list, under the title bar, you will find a chevron symbol. Clicking the chevron expands the list view so that it fills the window.

A button panel is located at the bottom of each screen. The buttons function as follows:

- **Print –** Click the button to print the data in the active screen in the order displayed.
- **Edit –** Click any row in the active screen to select it, then click Edit to edit it. Or, you can just double click an item in the form.
- **Add –** Click the button to add a new record to the form or table.
- **Save & Add –** Click the button to continue adding new records to a form.
- **Delete –** Click any row in the active screen to select it, then click Delete to remove it. A warning pops up and asks if you are sure.
- **Close –** Click the button to close the current screen. Or, you may hit the X in the upper right or double click the upper left corner of the screen.

## Chapter 2 – Getting Started

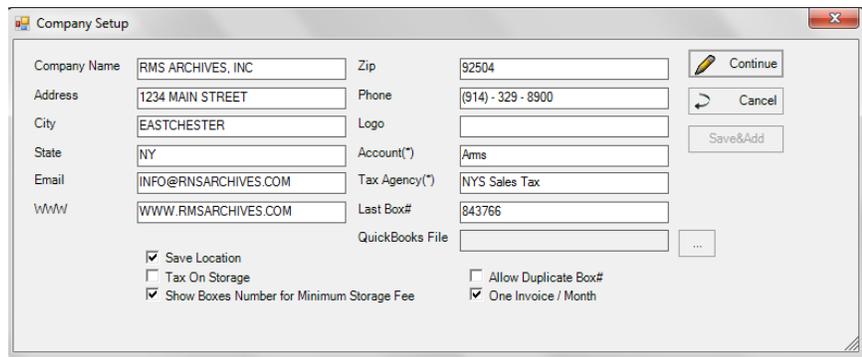
Getting Started in Archive Manager is primarily about getting organized. A successful implementation depends more on the organization and quality of your existing data than on how it will be handled by Archive Manager.

Whether you are just getting started in a new business, or converting information for records that have been in use for many years, it is critically important to carefully consider all the types of information you will require – date received, storage location codes, box size codes and descriptions, destroy dates, folder parameters, billing codes, etc. – **before** you begin entering data. These items must be defined to the Archive Manager software before deployment, and some of them are difficult or impossible to change after you are under way.

### Company Setup

The Company Setup screen (*right*) is where you will enter information about your own company. To open the screen, click **Security > Setup** on the Menu Bar.

Fig. 8



The screenshot shows a 'Company Setup' dialog box with the following fields and options:

Company Name	RMS ARCHIVES, INC	Zip	92504	Continue
Address	1234 MAIN STREET	Phone	(914) - 329 - 8900	Cancel
City	EASTCHESTER	Logo		Save&Add
State	NY	Account(*)	Arms	
Email	INFO@RMSARCHIVES.COM	Tax Agency(*)	NYS Sales Tax	
WWW	WWW.RMSARCHIVES.COM	Last Box#	843766	
		QuickBooks File		...

Checkboxes and options at the bottom:

- Save Location
- Tax On Storage
- Show Boxes Number for Minimum Storage Fee
- Allow Duplicate Box#
- One Invoice / Month

Please note that your company's name, address, and phone number will appear on the bottom of all the reports to your clients exactly as it is entered here. Some of these fields are straight forward, but others require some explanation.

#### LOGO

Archive Manager can use your company logo as a background on many of its screens. Enter the logo file's path name in the Logo Field to identify it to Archive Manager (not yet implemented as of this writing).

#### ACCOUNT

This is the name of the income account in QuickBooks (or other accounting software) to which customer charges are exported. This is explained in *Chapter 11 – Billing. Account*

#### Tax Agency

The Tax Agency is the taxing authority, as specified in your accounting software, to whom sales tax is reported. This is likewise explained in *Chapter 13 – Using Archive Manager with QuickBooks*.

#### LAST BOX #

The Last Box # field is the "counter" for your bar coded box labels. When bar coding is in use, a unique Box Number is assigned to each arriving box. Archive Manager stores the last assigned number in this field, and adds 1 to determine the next number to assign.

When you begin using Archive Manager, you must specify the beginning number that the computer will use. If you already have 100,000 Boxes in storage, you might want to set this number to 101,000 to give yourself a small buffer. Remember that Box Number is a 9-digit field, so you can have almost a billion box numbers.



**IMPORTANT:** *You should never set this number lower than the number of boxes already in storage because, if you have given any of your clients preprinted client Box Labels, numbers might be duplicated.*

#### QUICKBOOKS FILE

A QuickBooks File is used only if you will be linking Archive Manager to QuickBooks. In that case, Archive Manager needs to know where to find the data file in which QuickBooks stores your accounting information. You can click the ellipse to the right of the field to navigate to file's location. Its extension is \*.QBW, and it is usually found in:

C:\ProgramFiles\Intuit\QuickBooks\[QuickBooks account name].QBW.

Be certain that the file's full (absolute) pathname is entered.

If you are NOT linking Archive Manager to QuickBooks, leave the field blank.

#### SAVE LOCATION

The Save Location feature is used if your record center reserves a storage space after a box is checked out so that another one cannot be stored in its place. If it does not use this system, the item should be left unchecked.



**IMPORTANT:** *This parameter cannot be easily changed once you begin to use the software.*

#### TAX ON STORAGE

Although uncommon, some states require that you collect sales tax on storage fees. When this item is checked, Archive Manager calculates sales tax and adds it to the billing. Default configuration is **unchecked**.

#### SHOW BOXES NUMBER FOR MINIMUM STORAGE FEE

For clients that receive a minimum storage fee, you have a choice to list the number of boxes by box size on the monthly invoice. Default configuration is **unchecked**

#### ALLOW DUPLICATE BOX #

As delivered, Archive Manager is configured with Allow Duplicate Box item **unchecked** by default, so that no two boxes can be assigned the same Box Number. It is strongly recommended that duplicate box numbers **not** be permitted.



**IMPORTANT:** *This parameter cannot be easily changed once you begin to use the software.*

#### ONE INVOICE/MONTH

When One Invoice/Month is checked, Archive Manager issues a single monthly invoice for each client that combines monthly storage and service charges. If left unchecked, two invoices will be generated for each client, one for storage and another for services. This is easily changed from month to month. Default configuration is **unchecked**.

## User Groups

When you log into Archive Manager for the first time using the **superuser password** you received (*right*), you will be able to create both user groups with common rights and permissions, as well as individual users. A password must be provided after each user is created.



Fig. 9

On the Menu Bar, click **Security > User Groups** to enter the User Groups Screen, and click the **Add** button to add a new user group. Enter a name for the group, such as **Lookup** or **Power Users**.

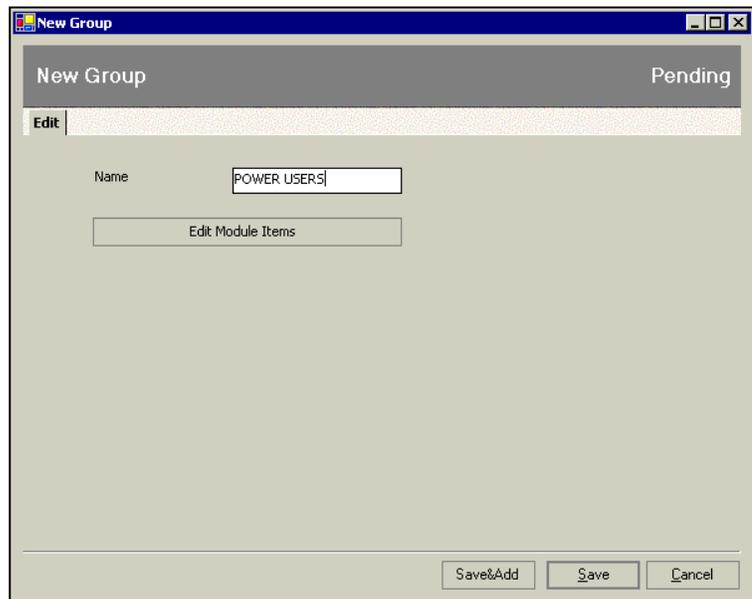


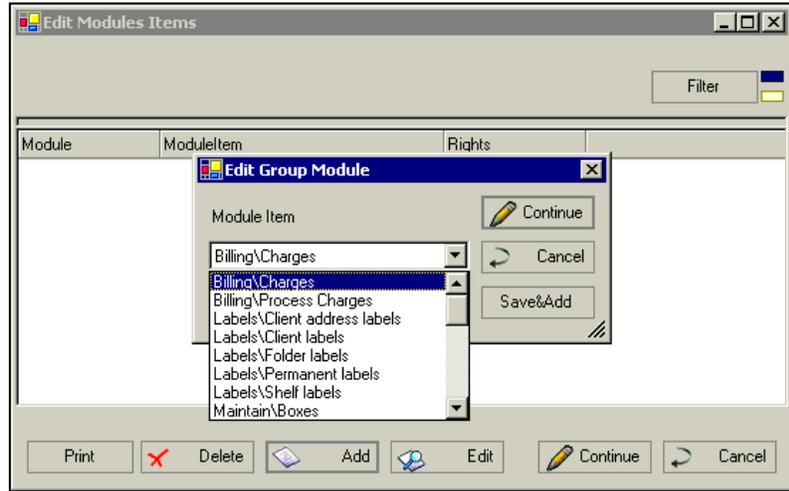
Fig. 10

Then click **Edit Modules** to assign rights to the group you added. Select the item to assign in the upper scroll box (*below*), and then select the level of access in the lower scroll box (not visible in illustration).

The level choices are:

- **Full access**
- **No Access**
- **Read Only**
- **Browse Only**

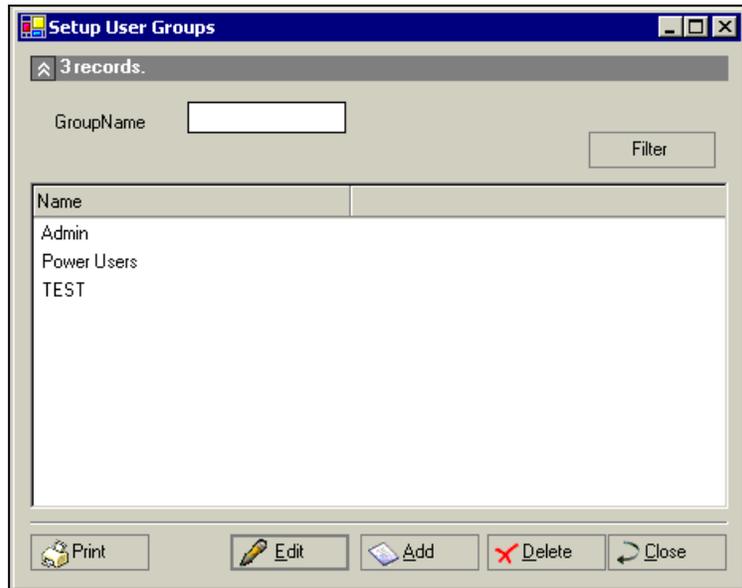
Fig. 11



Click **Continue**; the Setup User Groups Screen appears (*right*), populated with the added groups.

To edit existing user Groups, simply double-click the desired group.

Fig. 12



## Folder Field Labels

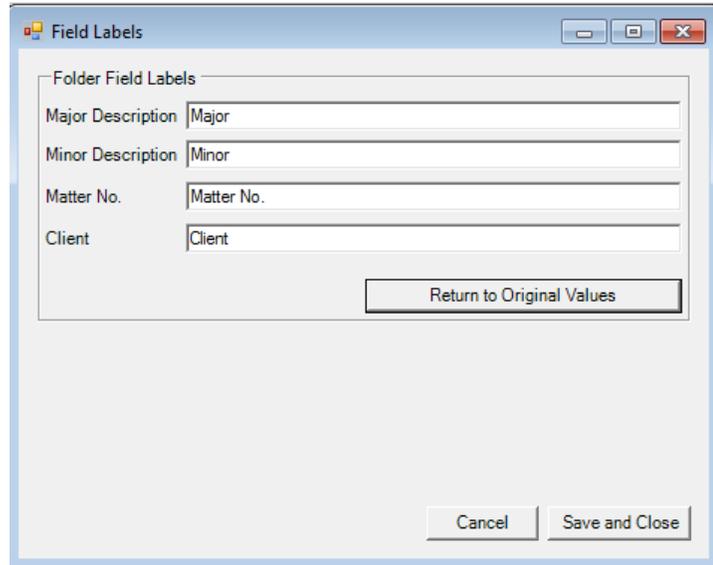
From the main top menu click Setup and pull down to Field Labels.

This feature allows you to change the names of certain fields related to folder information throughout the system. The text in the *boxes* represents the individual field names that appear on the Folder Information Screen.

You can change the following fields

Major Description  
Minor Description  
Matter No.     *Fig. 13*  
Client

Type over the field names to change to whatever makes sense to you.



When you are finished making changes, click **Save**

These field names will appear on the folder edit screens and folder reports throughout Archive Manager.

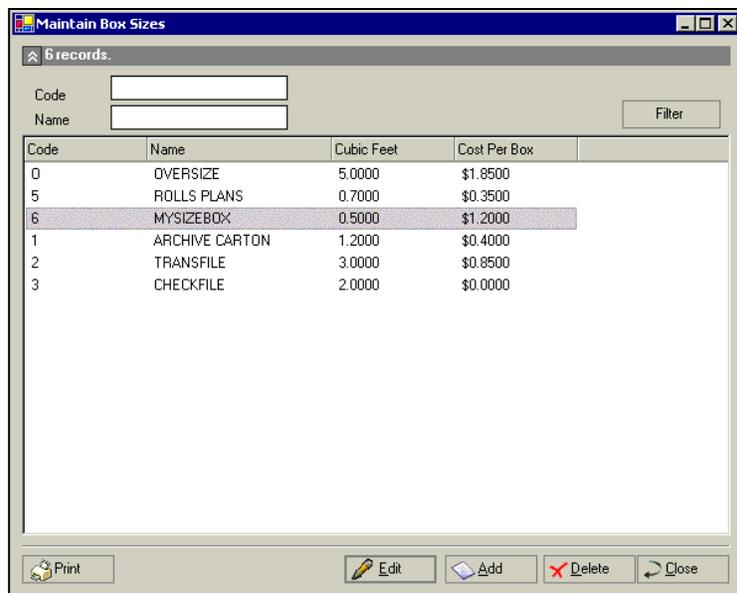
**Note** - if at any time you want to return to default field labels, just click **Return to Original Value**.

## Box Size Code

To enter the Box Size Screen, click **Setup > Maintain Box Sizes** on the Menu Bar.

Archive Manager allows you to define, and update as needed, all of the different box sizes you will be storing. Each different box size is represented by a 10 position alphanumeric code which is entered into the Master Box Size Code file. Archive Manager uses this file to verify box information as it is entered, and to calculate storage fees.

*Fig. 14*



Code	Name	Cubic Feet	Cost Per Box
0	OVERSIZE	5.0000	\$1.8500
5	ROLLS PLANS	0.7000	\$0.3500
6	MYSIZEBOX	0.5000	\$1.2000
1	ARCHIVE CARTON	1.2000	\$0.4000
2	TRANSFILE	3.0000	\$0.8500
3	CHECKFILE	2.0000	\$0.0000

Data for each Master Box Size consists of:

- **Code** – 10 positions alpha/numeric (Code field)
- **Name** – 30 positions alpha/numeric

- **Cubic Feet** – 9 positions numeric with 4 decimal positions  
When a client is to be billed **per cubic foot**, Archive Manager uses the information in the Client Box Size Code file and the Billing Rate in the Client Master to calculate their storage fee.
- **Cost Per Box** – 10 positions numeric with 4 decimal positions  
Cost per Box: When a client is to be billed 'per box' the computer will use the cost field as the rate they are to be billed for the total number of that size box.

 **IMPORTANT!** Master Box Size Codes must be entered into Archive Manager before you begin entering any client data, and before any locations can be set up.

It is useful to think of the Master Box Size Code as a template that is used each time you set up a new client.

As new clients are entered in Archive Manager, the Master Box Size and Billing Codes are copied into the client's files. If the Master Box Size Codes are omitted at this stage, neither box sizes nor billing codes will be established for those clients. It would then be necessary to enter the Box Sizes and Billing Codes one-by-one for each added client - an onerous task.

**Filter** – You may put any code or name into the filter boxes and click the **Filter** button to search for a box size code. Remember that you can sort on the form by clicking the column heading.

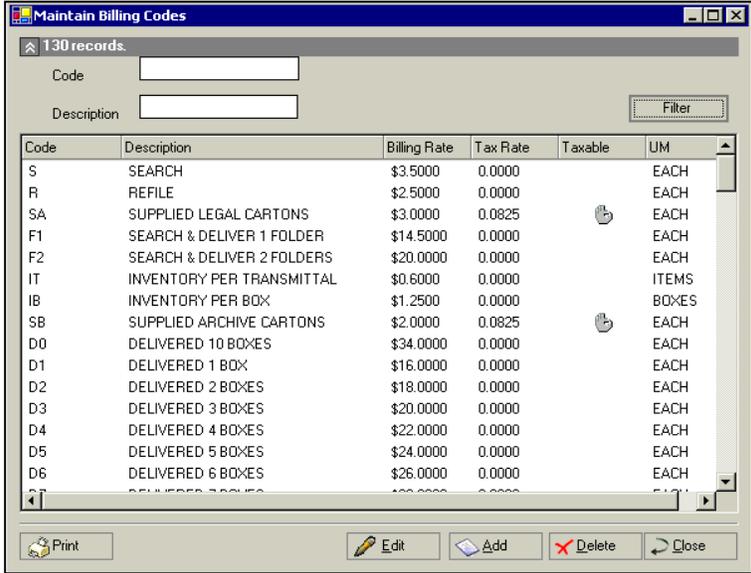
## Billing Codes

### THE MAINTAIN BILLING CODES SCREEN

Billing Codes are used to describe the various services for which your company charges fees; i.e., pick up, delivery, retrieval, indexing new boxes, etc.

To access the Maintain Billing Codes Screen, click **Setup > Billing Codes** on the Menu Bar.

Although Archive Manager permits you to set up individual rates for every service for each client, a majority of clients will pay a default fee for most services. The master set of Billing Codes is simply a default set of values that Archive Manager automatically copies into the clients Billing Code file for each new client entered in the system. This way, if your company has 50 or more services, you only need to



Code	Description	Billing Rate	Tax Rate	Taxable	UM
S	SEARCH	\$3.5000	0.0000		EACH
R	REFILE	\$2.5000	0.0000		EACH
SA	SUPPLIED LEGAL CARTONS	\$3.0000	0.0825		EACH
F1	SEARCH & DELIVER 1 FOLDER	\$14.5000	0.0000		EACH
F2	SEARCH & DELIVER 2 FOLDERS	\$20.0000	0.0000		EACH
IT	INVENTORY PER TRANSMITTAL	\$0.6000	0.0000		ITEMS
IB	INVENTORY PER BOX	\$1.2500	0.0000		BOXES
SB	SUPPLIED ARCHIVE CARTONS	\$2.0000	0.0825		EACH
D0	DELIVERED 10 BOXES	\$34.0000	0.0000		EACH
D1	DELIVERED 1 BOX	\$16.0000	0.0000		EACH
D2	DELIVERED 2 BOXES	\$18.0000	0.0000		EACH
D3	DELIVERED 3 BOXES	\$20.0000	0.0000		EACH
D4	DELIVERED 4 BOXES	\$22.0000	0.0000		EACH
D5	DELIVERED 5 BOXES	\$24.0000	0.0000		EACH
D6	DELIVERED 6 BOXES	\$26.0000	0.0000		EACH

Fig. 15

specify any exceptions to the default values as you set up each new client.

When a flag notifies Archive Manager that a fee should be prorated, the billed amount will be calculated based upon the date a box or folder was received and the number of days in that month. Prorating is used when new boxes are received during the monthly billing cycle, so that storage can be charged for each day remaining in the cycle.

**Filtering** – You may put any code and/or description into the filter boxes and click the **Filter** button to search for a billing code. Remember that the wildcard character is %.



**NOTE:** The Master Billing Codes must be entered in Archive Manager before you begin entering clients.

### THE CURRENT BILLING CODE SCREEN

Billing Codes are edited on the Current Billing Code Screen. To enter this screen from the Maintain Billing Codes Screen, either highlight the desired code and click **Edit**, or simply double-click the code you wish to edit.

The fields are as follows:

- **Taxable** – check this box if this item is subject to sales tax.
- **ProRate** – check this box if this item is going to be prorated for days in a month.
- **Autobill** – check this box if fixed charges are to be billed automatically.
- **Code** – this is a 10 position alphanumeric field
- **Description** – the description of the billing item.
- **Unit of Measure** – each, boxes, hours, etc.
- **Billing Rate** – the rate in dollars to 4 decimal places
- **Tax Rate** – the tax rate in decimals.
- **Change Client's Billing Rate** – check this box to change all clients' rates that match the master rate. Clients with a special or different billing rate will not change.

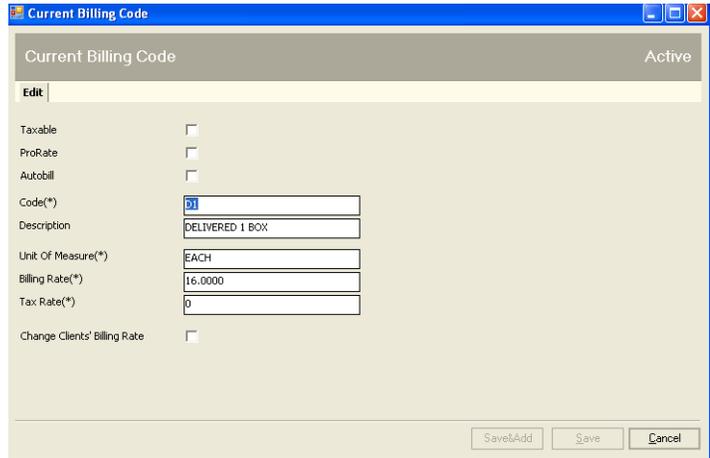


Fig. 15

## Media Codes

### THE MEDIA LIST SCREEN

Media Codes can be used to describe any box or file features on which you may wish to perform a search.

To access the Media List Screen (right), click **Setup > Media Codes** on the Menu Bar.

**Filter** – You can filter on any Media Code or Name as described above.

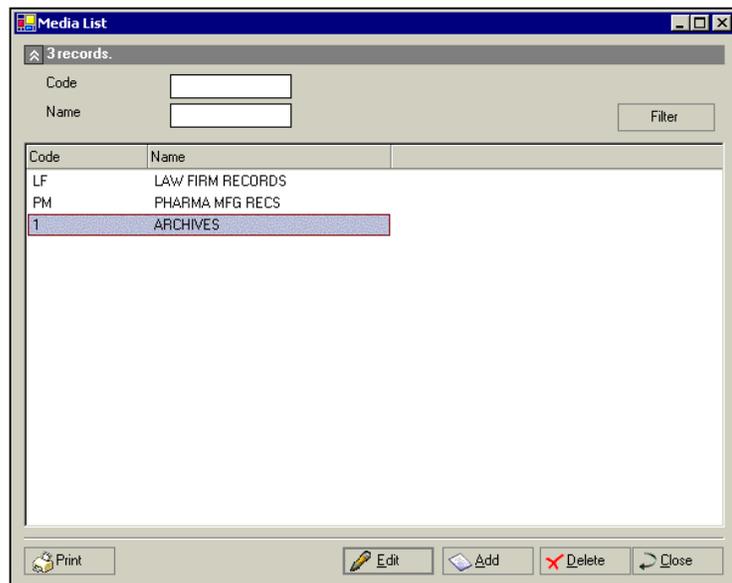


Fig. 17

## THE CURRENT MEDIA SCREEN

Media Codes are edited at the Current Media Screen. To enter this screen from the Media Codes Screen, either highlight the desired code and click Edit, or simply double-click the code you wish to edit.

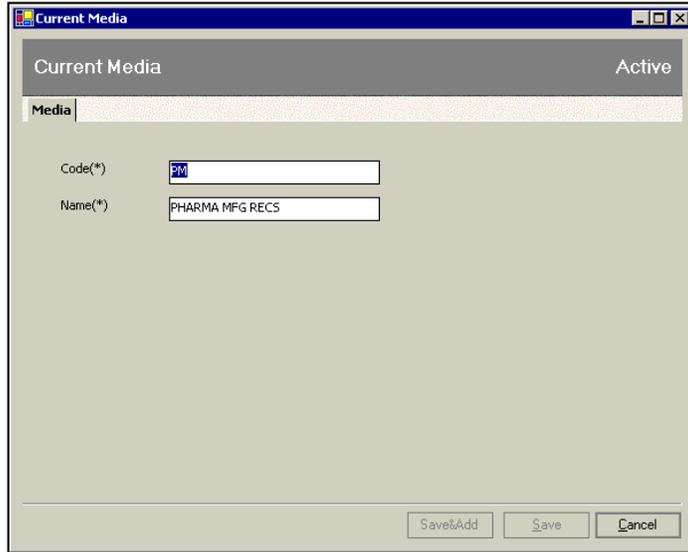


Fig. 18

## Locations

### THE LOCATIONS LIST SCREEN

The layout of the aisles, bays and shelves throughout your record center is input at the Locations List screen. You may have multiple locations (buildings), several floors in one or more of the buildings, mezzanines, etc. This information is displayed in the Locations List (right).

To access this screen, click **Maintain > Locations** on the Menu Bar.

**Filters** – Several filters are available here, and may be used in combination.

**Location** – You may enter all or part of a location using the wildcard character %. Or you may request a range by...

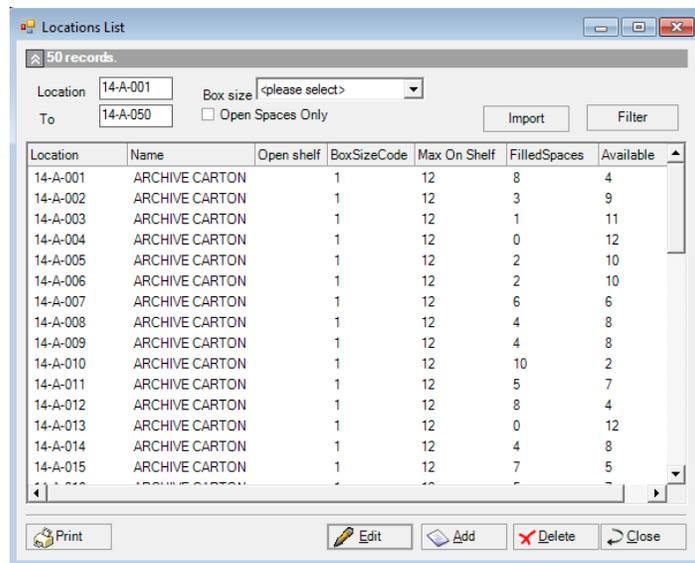


Fig. 19

entering a beginning location in the Location box and an ending shelf location in the To box.

- **Box Size** – This is a pull down menu of the box sizes in your master file.
- **Open Spaces Only** – The filter will display only those shelves with open spaces.

For example, if you wanted to display all the open archive carton shelves for Isle A on the 14<sup>th</sup> floor of a building, you would put 14-A in your filter.

Remember that your query results can be sorted by clicking on the bar at the column heading.

## THE CURRENT LOCATION SCREEN

Locations are edited at the Current Location Screen (*Figure 19*). To enter this screen from the Location List Screen, either highlight the desired code and click **Edit**, or simply double-click the code you wish to edit.

In this illustration, 4 of the 8 available spaces are occupied.

Each Location Master will contain:

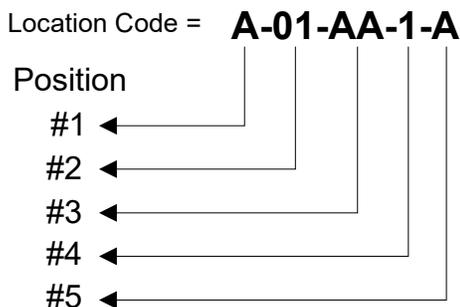
- **Box Size Code** – this may be pulled down by using the tab to the right or typed in.
- **Open shelf** – used for folders & tapes stored open without a box.
- **Location Code** – 11 places, numbers and letters.
- **Maximum Space on Shelf** – 3 places, numbers only. *Fig.20*
- **Name** – the box size code name is automatically obtained from the Box Size Code table.
- **Filled Spaces** – a count of currently occupied spaces.
- **Empty Spaces** – a count of currently unoccupied spaces.



**NOTE:** RMS works closely with each Archive Manager user to establish a scalable but easy to use Location Code numbering scheme for their particular business.

Location Codes can be designed to contain all your pertinent location information; for example, the building, floor, aisle, bay and the shelf within the bay, depending on your business requirements. The Location Code field is sufficient in size to accommodate most location codes schemes. It is a good practice to use dashes (-) to separate key elements of the location code.

An example of a typical Location Code configuration is as follows:



*Fig. 21*

*In this hypothetical implementation:*

Position #1 represents the building number or code.

Position #2 represents the floors.

Position #3 represents the aisles.

Position #4 represents the bays down an aisle.

Position #5 represents the shelves in a bay.

Remember - this is just an example. In most cases, your existing numbering scheme will be useable as-is.

Archive Manager can accommodate storage of up to 99 containers on any one shelf. If you are storing more than 99 containers on a shelf, you will need to define that location to Archive Manager as **two** shelves.

Incidentally, you can see from this example why it is crucial to enter Master Box Size Codes before entering client information;

## Creating Locations From Spreadsheets

Using the import Excel spreadsheet typically located in C:\Program Files\RMS\Archive Manager\Settings you can import locations. This is very useful for mass entering locations.

The Excel File is **Import\_Location.xls**

### Columns

- Location – location code
- Box\_Size – box size code (must be set up in Archive Manager first)
- Max\_on\_Shelf – maximum number of spaces

On the top of the **Maintain Locations** list click Import. Navigate to the folder where you have saved Import\_Location.xls and double click it or highlight it and click Open. Your locations will import into Archive Manager.

## Industry Codes

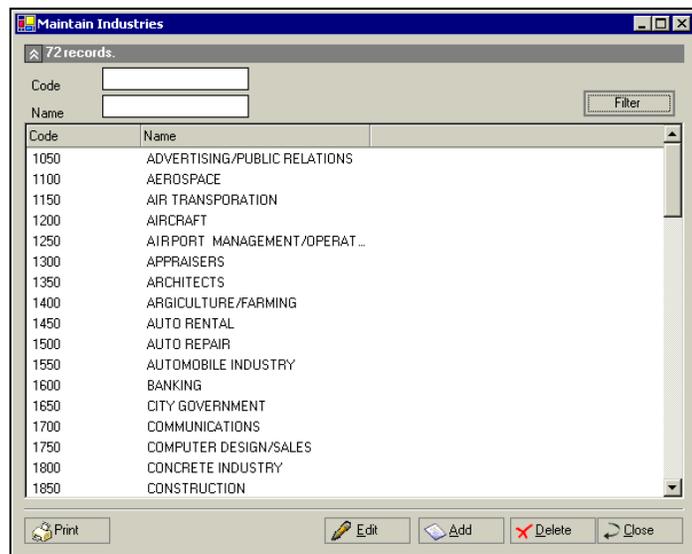
### THE MAINTAIN INDUSTRIES SCREEN

To access the Maintain Industries Screen (*right*), click **Setup > Industry Codes** on the Menu Bar.

This table contains a list of FTC industry codes. You can edit the list or add additional codes.

**Filters** – You may put any code or name into the filter boxes and click the **Filter** button to search for an industry code.

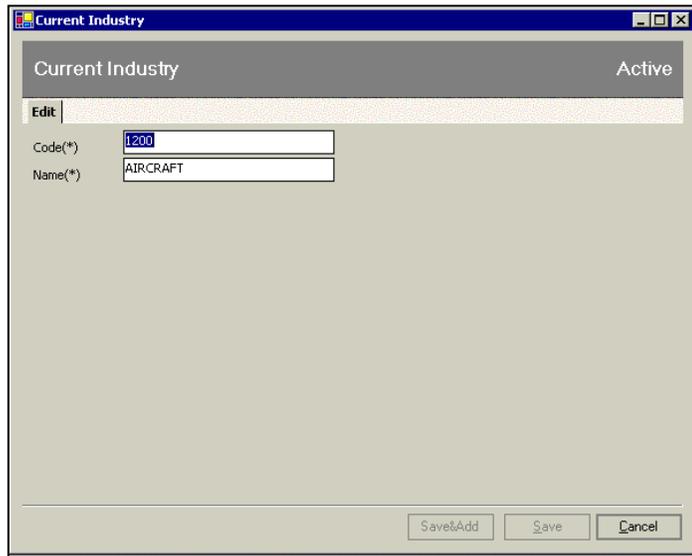
Fig. 22



## THE CURRENT INDUSTRY SCREEN

Industries on the list can be edited, or additional industries added, at the Current Industry Screen. To enter this screen from the Maintain Industries Screen, either highlight the desired industry and click **Edit**, or simply double-click the industry you wish to edit.

Fig. 23



## Chapter 3 – Setting Up Customers

### ENTERING AND MAINTAINING CLIENTS

The client information that is entered in Archive Manager is stored in the Client File. This is a key file in Archive Manager in that it contains all the critical information pertaining to each client.

You will be entering information regarding:

- address, city, state and ZIP
- billing address, city, state and ZIP
- telephone numbers, business, fax, 800 number, etc.
- email and Web addresses
- contract
- storage and service rates
- tax-exempt status

Fig 24

### THE MAINTAIN CLIENTS SCREEN

The information you will need to find your clients in the Archive Manager system is displayed on the Maintain Clients Screen (right).

To access this screen using the Menu Bar, click **Maintain > Customers**. Or, using the Task Pane, click the **Maintain** tile then the **Customers**

Code	Name	Billing contact	City	Email	Phone	Industry	Active
600	MOSLER SLAGER	HALEY GREEN	NEW YORK	HGREEN@MSL...	(212)-686-69...	2800	
6360	LION BROKERAGE	KIM DALTON	NEW YORK	KDALTON@LIO...	(212) - 752 -...	4200	
SAMPLE	SAMPLE COMPANY	ACCOUNTS PAYABL	NEW YORK		(212) - 997 -...	9999	
LEVEN	LEVEN & TAYLOR	MIKE EWING	PETERSVI...	MEWING@LTL...	(815)-765-43...	2800	
ROYAL	ROYAL SALES CORP	JOHN BYRNES	YONKERS	JBYRNES@RO...	(914) - 543 -...	9999	
5120	LOWELL REILLY & MCG...	KIM YOUNG	NEW YORK	KYOUNG@LRM...	(212)-923-08...	9999	
5140	KEEVER INSURANCE	DOUG KEEVER	NEW YORK	DKEEVER@AO...	(212)-234-99...	9999	
770	TECH-COMM BIZ		ROCKAW...	PLEVIN@TECH...	(973)-989-23...	2200	
4580	HARRISON INSURANCE	GEORGE DANIELS	NEW YORK	F CLEMENT@HI...	(212)-521-91...	9999	
4501	GARRISON SECURITIES	ED DOYLE	NEW YORK	EDOYLE@GSC...	(212) - 565 -...	9999	
5260	SMITH NEWCOURT & TL	SARA ALBERT	NEW YORK	SALBERT@ANT...	(212)565-5200	9999	
3210	SCIENTIFIC AMERICAN...	N MCRATH	NEW YORK	NMCRATH@S...	(212)-721-33...	9999	
JA001	JAMES LAW	JOHN JAMES	STAMFOR...	DONNA@JAME...	(203)-293-98...	2800	
3230	MONARCH INSURANCE...	DON SMITH	NEW YORK	DSMITH@MON...	(212) - 543 -...	9999	
8015	WILLIAMS COMMODITIES	DEBBIE CASE	NEW YORK	DCASE@WILL...	(212) - 320 -...	9999	
8700	WESTCHESTER MED CE...	SARAH WOLF	VALHALLA	SWOLF@WEST...	(914) - 321 -...	9999	
6750	ROCHESTER INSURANCE	ANDRE PRICE	NEW YORK	APRICE@ROC...	(212) - 321 -...	9999	
8040	BANCO ITALIA	ROBERTO FERMI	NEW YORK	RFRMI@ITALI...	(212) - 343 -...	9999	

To view a specific client, enter one or more criteria and click the **Filter** button. Or, to select a client from the full list of clients, simply click the **Filter** button without entering any criteria to see the full list.

### Filters

- **Code** – client code
- **Name** – client name
- **City** – city
- **Active** – click checkbox filter to select: All Clients, Active Clients, or Inactive Clients

### THE CURRENT CLIENT SCREEN

Individual clients are edited at the Current Client Screen. To enter this screen from the Maintain Clients Screen, either highlight the desired client and click **Edit**, or simply double-click the client you wish to edit.

Fig. 25

**Current Client** (Active)

**Edit**

Code(\*) ROYAL Industry(\*) 9999

Name(\*) ROYAL SALES CORP

Email JBYRNES@ROYALSALES.COM Web WWW.ROYALSALES.COM

Email(2) MHARRIS@ROYALSALES.COM

**Main**

Address(\*) 453 MAIN STREET City(\*) YONKERS Zip(\*) 10709-0984

SUITE 220 State(\*) NY

Phone (914) - 543 - 1000 Fax (914) - 543 - 2135

Phone(2) 0 - - Toll Free 0 - - Extension

**Billing**

Same as Main

Address 453 MAIN STREET City YONKERS Zip 10709-0984

SUITE 220 State NY Billing Contact JOHN BYRNES

Phone (914) - 543 - 1000 Fax (914) - 543 - 2135 Extension

Comments All deliveries must be made after 9:30 AM

**Charge**

Contract Departments Contacts Box Sizes Billing Codes Fixed Current

Save&Add Save Cancel

Client data can be exported directly into QuickBooks using the Accounts Export Utility described in Chapter 13.

The Current Client Screen displays the following fields:

- **Code** – a 10 position alphanumeric identifier for the client company.
- **Industry** – the FTC Industry Code; may be entered by typing or selecting from pull-down list.
- **Name** – the client company’s business name.
- **Active** – click this box if this is an active client.
- **Email** – the main contact’s email address (additional email addresses will be added later in this process). Note this email address will be used to send PDF invoices. See Chapter 11 End Month Billing.
- **Email (2)** – second email for PDF invoices
- **Web** – the client company’s Web address.
- **Address** – the client company’s street address - 2 lines are provided.
- **City** – the client company’s city.
- **State** – the client company’s state; may be entered by typing or selecting from pull-down list.
- **Zip** – the client company ZIP; configured for 9 digit zip codes.
- **Phone** – the client company’s phone number.
- **Fax** – the client company’s fax number.
- **Phone (2)** – the secondary phone number (such as primary contact’s direct phone number).
- **Toll Free** – the client company’s toll free phone number.
- **Billing Contact** – the person to whom bills are addressed.

At this point, if the billing address is the same as the main address, then just click **Same as Main**. If not, continue filling in the **billing address** fields.

Once you have completed this form, it is important to continue with other pertinent information about this client by clicking the buttons at the bottom of the form.

### THE CUSTOMER CONTRACT SCREEN

Click the **Contract** button to access the Customer Contract Screen (*right*), which contains the following fields:

- **Departmental Billing** – check this box if departmentalized invoicing will be used.
- **Departmentalized client** - check this box for departmentalized reporting.
- **Tax-Exempt** – check this box if the client is tax-exempt. (Be sure to obtain an ST-5 form for your records.)
- **PDF Invoice** – check this box if the client will receive PDF invoices via email.

Fig. 26

The screenshot shows a window titled "Client Contract" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Departmental Billing:
- Departmentalized client:
- Tax Exempt:
- PDF Invoice:
- Storage Will be Billed: Monthly (dropdown)
- Fees Based On: Cubic Foot (dropdown)
- Rate per Cubic Foot: 0.2500 (text input)
- Billing Representative: GEORGE YURNER (text input)
- Contract/PO Number: W432 (text input)
- Invoice Terms: NET 30 (text input)
- Contract Begins On: 9/27/2003 (calendar picker)
- Contract Ends On: 9/27/2019 (calendar picker)
- Minimum Storage Fee: 0 (text input)
- Tax Rate: 0.0825 (text input)

At the bottom of the form, there are three buttons: "Save&Add", "Continue" (with a pencil icon), and "Cancel" (with a return icon).

- **Storage Will be Billed** – select billing period from the pull-down menu (default is monthly).
- **Fees Based On** – select Per Box or Per Cubic Foot from the pull-down menu (default is Per Box).
- **Billing Representative** – client’s billing contact at your company.
- **Contract/PO Number** – the contract or purchase order reference number.
- **Invoice Terms** – when and how payment is expected from client, as per contract.
- **Contract Begins On** – beginning date of contract.
- **Contract End On** – termination date of contract.
- **Minimum Storage Fee** – if not blank, storage charges totaling less than the indicated amount will be adjusted up to this amount.
- **Tax Rate** – sales tax rate on taxable items, expressed in decimal form; i.e., a sales tax rate of 6.25% would be entered as .0625.



**IMPORTANT:** Remember each time you complete this form to press the **Continue** button to save your entries.

### THE CONTACT SCREEN

Click the **Contact** button on the Current Client screen to access the Contact List. Click **Add** or **Edit** on this screen, and the Contact Screen appears (*right, foreground*), where you can add a new contact for the customer, or enter details for the current contact.

The User Name will be the same as the User Name for the Web Access software, and the Password will be the Web Access software password.

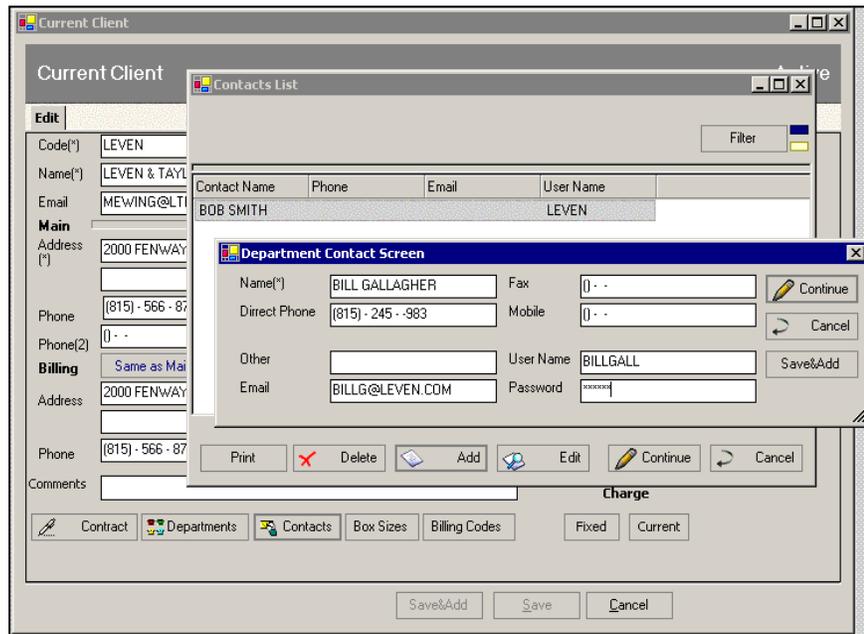


Fig. 27

### WEB ACCESS PASSWORDS

For information about Web Access Software or for a Web Access Password, see *Appendix C* in this Guide.

## Clients With Departments

### THE CLIENT DEPARTMENTS SCREEN

On the Current Client Screen (*Fig. 25, above*), click the **Department button** to access the Department Screen for the current client (*right*).

Click **Edit** to modify an existing department, or **Add** to add one.

The fields are as follows:

- **Client** – the current client’s name
- **Code** – a 10 place field with numbers and letters for the department code.
- **Name** – the department name

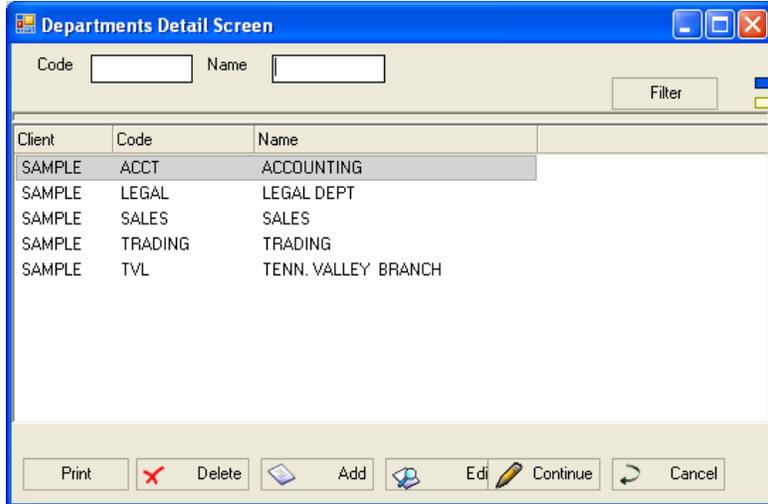


Fig. 16

To edit individual departments, just as with the previous detail screens, you can click Edit, or double click the desired department. *Fig. 28*

### THE DEPARTMENT DETAIL SCREEN

The Department Detail Screen is where the department information is recorded – with the exception of contacts.

Clicking the **Contacts** button on this screen accesses an additional screen, the Department Contacts List Screen (*Fig. 30, background, below*), where your department contacts are listed.



Fig. 29

## THE DEPARTMENT CONTACT SCREEN

Click **Add** or **Edit** on this screen, and the Department Contact Screen appears (Fig. , foreground), where you can add a new contact for the current department, or edit information for the current contact.

The User Name will be the same as the user name for the Web Access software, and the Password will be the Web access software password.

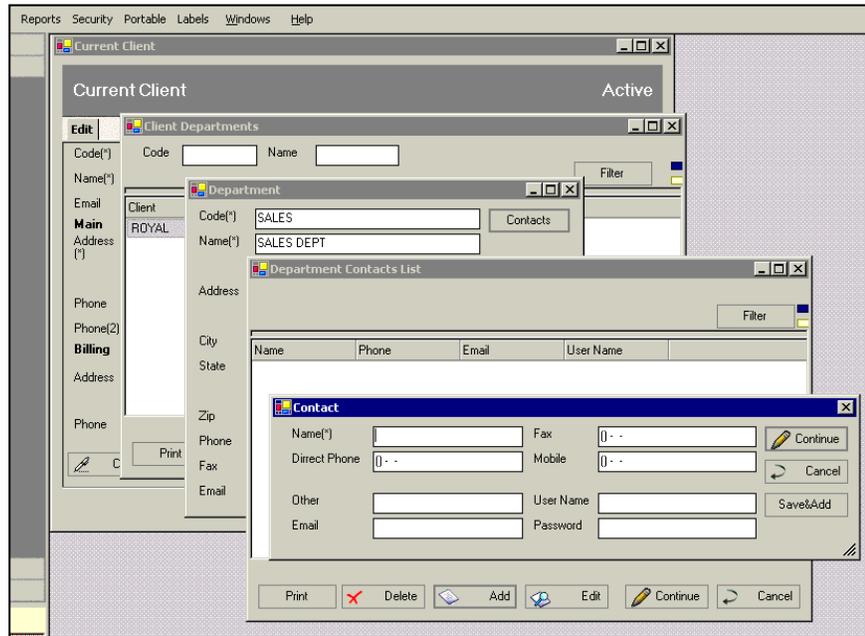


Fig. 30



**NOTES:** Contacts entered at the Departmental Contact screen will have access only to Web data for the **current** department.

To allow a user to access Web data for **all** departments, enter the Contact at the **NON-departmental** Contacts screen (Page 18). Contacts entered at that screen have **global** access to Web data for all departments.

## WEB ACCESS PASSWORDS

For information about Web Access Software or for a Web Access Password, see Appendix C in this Guide.

## Additional Setup Details

### THE BOX SIZES LIST SCREEN

Referring to Fig. 31 at right, a detail from the Current Client Screen, click the **Box Sizes** button to access the Box Sizes List Screen (Fig 32. , below).

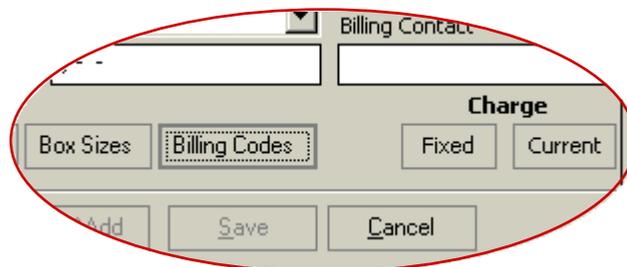


Fig. 28

Fig. 31

The Box Sizes List Screen employs the master Box Size Codes you entered during your initial set up. Use this screen to edit the Box Size Code Rates, or to add additional codes for this client.

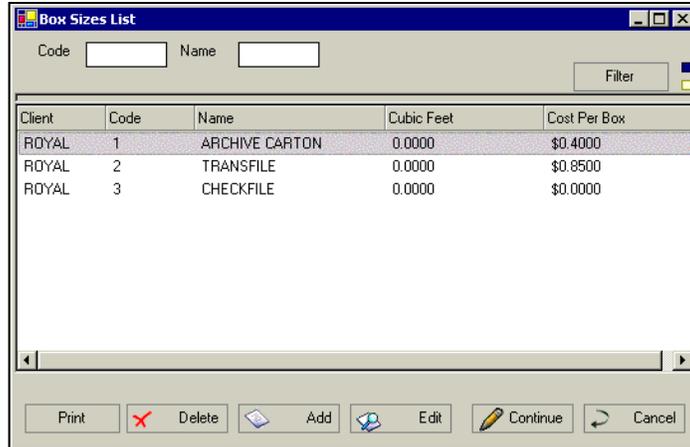


Fig. 32

### THE BILLING CODES LIST SCREEN

Referring again to Fig. , above, from the Current Client Screen, click the **Billing Codes button** to access the Billing Codes List Screen (*right*).

The displayed list employs the master Billing Codes you entered during your initial set up. Use this screen to edit the Billing Code Rates, or to add additional codes for this client.

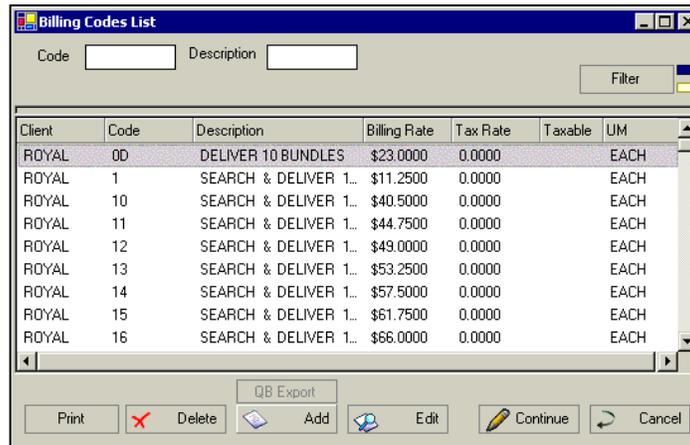


Fig.

173

### FIXED AND CURRENT CHARGES

Two additional buttons in the detail illustration above are for **Fixed Charge**, and **Current Charge**. These buttons access the Charge Entry Screen, which is discussed in Chapter 10, Billing.

**Filter** – You can use the filters to bring up clients of a specific code, name, and/or city. This may be used individually or in combination. Again, the query results may be sorted by clicking on the column heading.

### Exporting to QuickBooks

Once you have entered client data in Archive Manager, there is no need to manually re-enter it into QuickBooks; just export it into QuickBooks from Archive Manager.

#### EXPORTING CLIENTS TO QUICKBOOKS

Clients can be exported to QuickBooks using the *Accounting System Export* screen. For details about this feature, see *Exporting Invoices to QuickBooks (and Other Accounting Packages)* in Chapter 13.



**IMPORTANT:** *Archive Manager can export any particular record to QuickBooks only once. Before exporting records, make sure that they are complete and accurate! Corrections in QuickBooks can be made only manually.*

#### THE UTILITIES BUTTON

When the **Bill To** field for a client is empty, any attempt to export that record will cause a blank client record to be exported to QuickBooks.

When you are aware that this field is empty in one or more records you intend to export, proceed as follows:

- If working in the Maintain Clients Screen, highlight the desired records.
- Right-click anywhere on the gray area to access the action menu.
- Select **Utilities**, then **Same as Main**.

This forces Archive Manager to disregard any empty **Bill To** fields while exporting the selected records.

#### INACTIVE CLIENTS

When you flag a client as inactive by unchecking the Active client box in the current client edit screen, you can no longer add boxes, folders, tapes, or charges for this client. **Note** by default all new clients entered into Archive Manager are checked as Active.

## Chapter 4 – Record Titles

Record Titles are used by Archive Manager to identify groups or categories of records belonging to a given client. For example, a law firm might use Record Title **RE** to represent real estate closings. Record Title data can be used to calculate destruction dates to implement retention schedules for each client.

### THE SETUP RECORD TITLES SCREEN

To access the Setup Record Titles Screen (*right*), open the Maintain Panel on the Activity Pane and choose **Record Titles**. Or, on the Menu Bar, click **Maintain > Titles**.

The Client field on this screen serves as a filter, limiting the display to Record Titles of the specified client.

The active filter works as described in clients

To add a new item, Click the **Add** button to access the New Record Titles Screen.

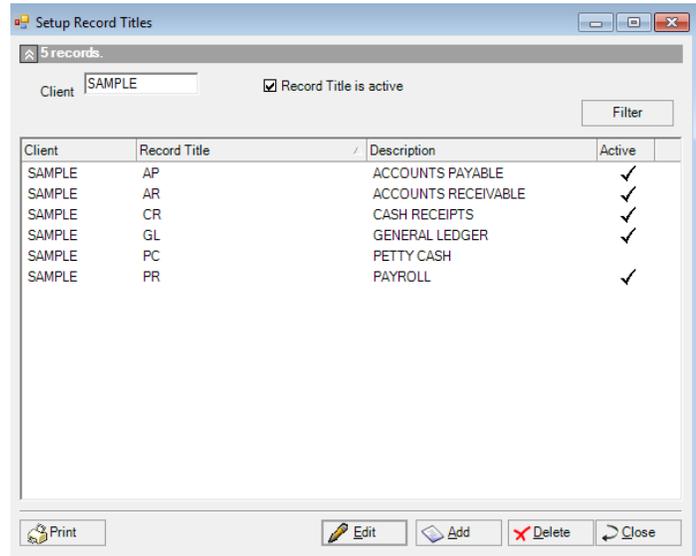


Fig. 34

### THE NEW RECORD TITLES SCREEN

The New Record Titles Screen (*right*) employs the following fields:

- **Client** – Client Code may be selected from pull down list or entered manually.
- **Record Title** – Enter client's Record Title Code for this item.
- **Active Record Title** – click this box if record title is active (checked by default)
- **Retention Date** – Retention Period for this item in years and months.
- **Description** – Unlimited text description of the Record Title item.
- **Regulation** - Unlimited text detailing the regulation for this item.
- **Apply Retention Date on Items button** – Click this button is to update the Destruction Date for all boxes and folders for a client whose retention period has been up dated.

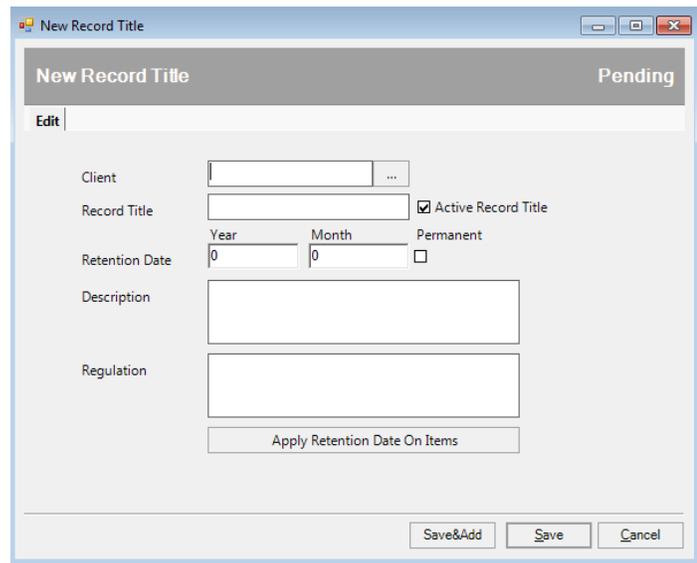
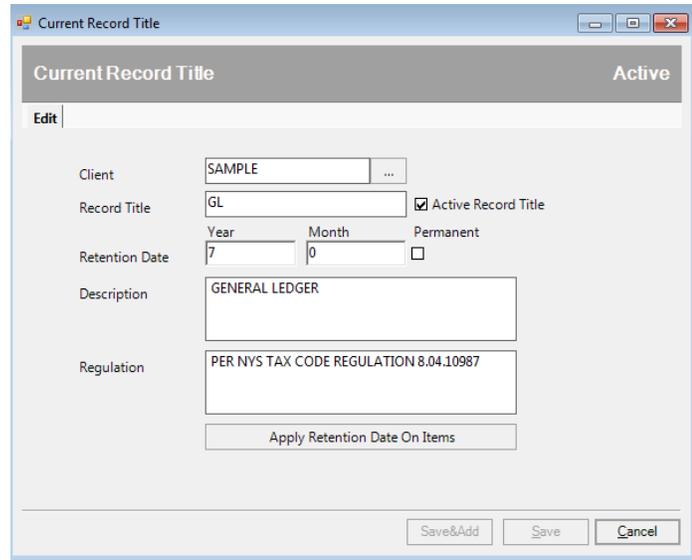


Fig. 35

## THE CURRENT RECORD TITLES SCREEN

Titles of existing records may be edited in the Current Record Title Screen, below. To bring up a record title on this screen, highlight or double-click it in the Setup Record Titles Screen (*Fig. 24*, above).

When you are finished making your changes in a field, **Tab** to the next field to save your changes. The **Tab** key also activates the **Save** button.



*Fig. 36*

## INACTIVE RECORD TITLES

When you flag a record title as inactive by unchecking the Active Record Title box in the current record title edit screen, you can no longer use this record title for boxes. **Note** by default all new record titles entered into Archive Manager are checked as Active.

## Chapter 5 – Boxes

### About Boxes and Folders

Archive Manager tracks boxes according to their assigned Box Number and storage location. Folders, however, are tracked according to the boxes in which they reside. They therefore share the unique Box Number of that box, followed by a Folder Number of between 1 and 999.

Some of your customers will be interested primarily in box storage and retrieval, while other will be concerned with individual folders. For example:

- a company controller made need to review all the general ledgers in a box, while
- an attorney may need to see the file containing a real estate closing.

Some customers may even have departments with differing needs. Archive Manger makes it possible for your record center to provide not just storage, but individualized record management services to every type of customer.

Box Storage Customers	Folder Storage Customers
<p>Examples:</p> <ul style="list-style-type: none"> <li>▪ Securities firms (brokerage)</li> <li>▪ Investment banks</li> <li>▪ Sales firms</li> <li>▪ Manufacturing</li> <li>▪ Banks</li> </ul>	<p>Examples:</p> <ul style="list-style-type: none"> <li>▪ Law firms</li> <li>▪ Accountants</li> <li>▪ Insurance Companies</li> <li>▪ Medical offices</li> </ul>
<p>For box storage customers, beyond the basic box description, there are two ways of recording additional details:</p> <ol style="list-style-type: none"> <li>1. Create fictitious folders to describe the box or its contents in greater detail, or</li> <li>2. Use the Comments field to record additional details.</li> </ol>	<p>Typical folder descriptions for folder customers:</p> <ul style="list-style-type: none"> <li>▪ Major – a client or patient</li> <li>▪ Minor – the subject matter</li> <li>▪ Matter No. – a file or client matter no.</li> </ul>
<p>Available Reports:</p> <ol style="list-style-type: none"> <li>1. Box content report, which includes folders,</li> <li>2. Box inventory report with parameter include text = Yes</li> </ol>	<p>Available Reports:</p> <ol style="list-style-type: none"> <li>1. Folders Inventory.</li> <li>2. Box inventory report ordered by ranges (if all the folders in a box are numeric ranges)</li> <li>3. Boxes W/O Folders report.</li> </ol>
<ul style="list-style-type: none"> <li>▪ Filtering: yes</li> <li>▪ Lists: yes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Filtering: yes</li> <li>▪ Lists: yes</li> </ul>

# Maintaining Stored Boxes

## THE MAINTAIN BOXES SCREEN

The Maintain Boxes screen displays the status of stored boxes and provides access to sub-screens for various box management activities. To access this screen, click the **Maintain Tab** on the Activity Pane to select the Maintain Panel, and then click **Boxes**. Or, you may click **Maintain > Boxes** from the Menu Bar.

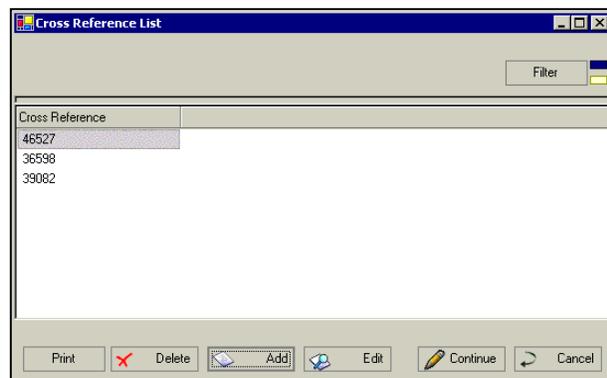
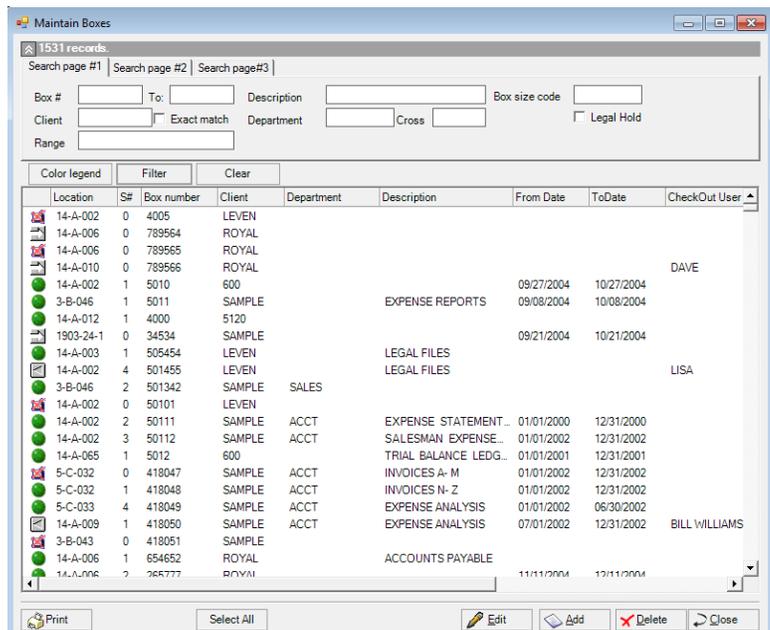
The status of each box is represented by a Box Status symbol in Column 1 of the display. The symbol meanings are as follows:

- **Green dot** – box is currently in the record center
- **Gray left arrow** – box has been checked out
- **Blue dot with red X** – box has been destroyed. *Fig. 37*
- **Gray hollow right arrow** – box has permanently been removed
- **Yellow/gray dot** – box has been requested for check out via Web Access.

The filters on this screen are as follows:

- **Box number** – (Required) 9 position numeric field. Numbers may be entered automatically by clicking the Last Box # button, or may be entered manually.
- **To** – You can enter a box number to filter on a range of box numbers.
- **Description** – 50 character alphanumeric field that can be used to describe the contents of the box.
- **Client** – Client Code, a 10 position alphanumeric field. Click the Ellipse Button to select the code from a list, or enter it manually. When field is populated, the client's full name appears in the box to the right. Click the Exact match box to match the client code exactly.
- **Department** – Department Code, a 10 position alphanumeric field. Click the Ellipse Button to select the code from the Client Master List, or enter it manually.
- **Range** – a numeric file number which will display boxes in that set of values.
- **Legal Hold** – click checkbox filter to select boxes on legal hold.
- **Cross References** – Click the **Cross Reference** button to access the Box Cross Reference List (*right*). You may add unlimited cross references, typically box numbers.

Note that only the first cross reference is displayed on any of the box edit screens. All cross references are searchable, however. *Fig. 38*



## Search page #2

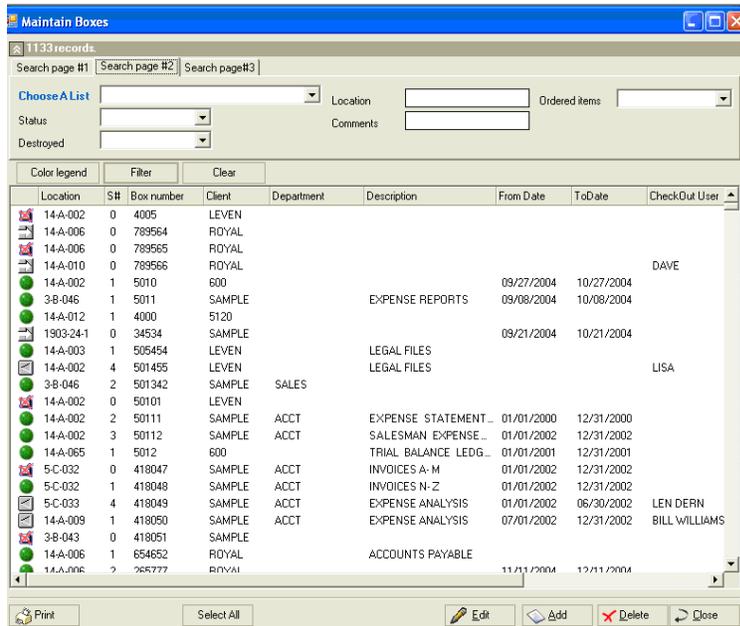


Fig. 39

The fields on Search page #2 are as follows:

- **Choose A List** – Allows you to select an existing list. (When you use a filter, the resulting selection can be saved to a list that you can use to access those items quickly. For an explanation of List and how to use them in Archive Manager, see *Chapter 7 – Lists*.)
- **Location** – Filter: enter a specific location to limit your search to that location.



**NOTE:** Because storage spaces are reserved for specific box sizes, the Box Size and Space Number on storage shelves are entered automatically when you choose the location. Therefore, box sizes must never be mixed on a single shelf; i.e., boxes of each size must only be placed on shelves reserved specifically for that box size.

- **Status** – Pull down filter containing a scroll menu. The menu gives you a choice of:
  - ❖ All boxes
  - ❖ Checked Out boxes
  - ❖ Boxes in record center
  - ❖ Requested by All Users boxes
  - ❖ Requested by Current Users boxes
  - ❖ Requested from Web Access boxes
- **Destroyed** - Pull down filter containing a scroll menu. The menu gives you a choice of.:
  - ❖ Live boxes
  - ❖ All Boxes
  - ❖ Destroyed boxes
  - ❖ Permed out boxes
- **Comments** – unlimited additional text.

### Search page #3

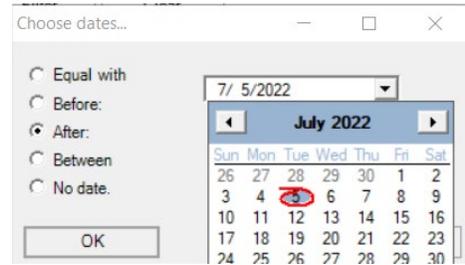
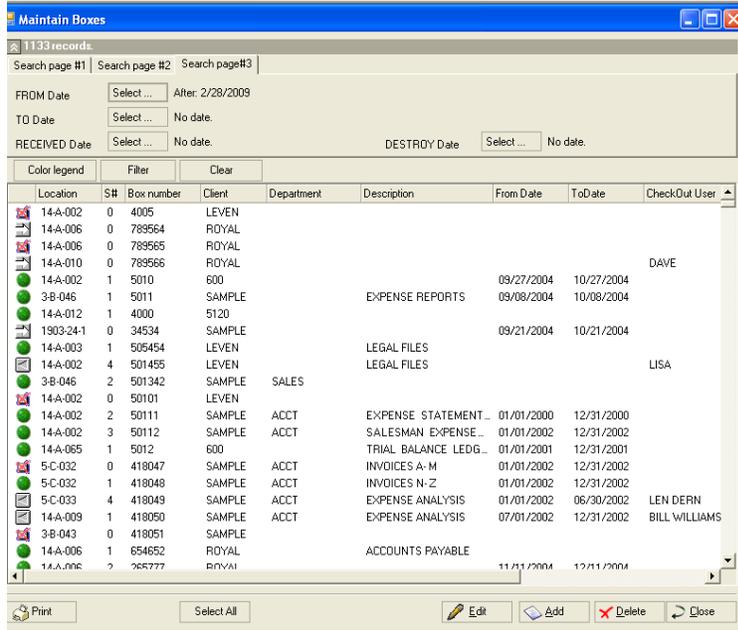


Fig. 40

The fields on Search page #3 are as follows:

- **From date** – click select to bring up the calendar to select the box from date.
- **To date** – click select to bring up the calendar to select the box to date.
- **Received date** – click select to bring up the calendar to select the box received date.
- **Destroy date** – click select to bring up the calendar to select the box destroy date.

## Editing Box Information

### THE CURRENT BOX SCREEN

If you need to locate a box for editing, using filters in any of the box screens is a quick way to find it.

Once the box is on your screen, to edit the Box Information from any screen, you can either

- select the box and click Edit, or
- double-click the box

to open the Current Box Screen (right).

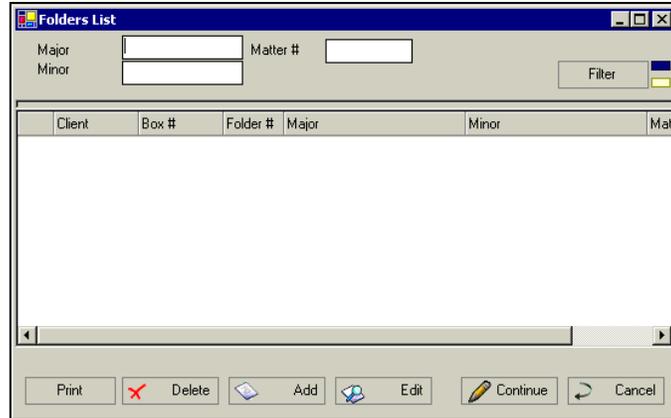
Fig. 41

Simply enter or change the desired information, add folders or cross references, and click Save. The fields with asterisks are required fields and are described along with any fields which were not previously described, below.

- **Client** – (required on this screen).
- **Received** – (contains the current date by default) Date field showing the date box is received into record center.
- **Destroy** – (contains 12/31/9998 by default) Date field indicating the month, day, and year this box is eligible for destruction. Archive Manager interprets the default date 12/31/9998 to mean **permanent**.
- **From Date** – Date field used in conjunction with the To Date field to describe the time interval covered by box contents.
- **To Date** – Date field used in conjunction with the From Date.
- **Ranges** – Range of file numbers that can be used to describe a sequence of files stored in the box.
- **Record Title** – After Record Titles have been set up (see *Chapter 4*), click the Ellipse Button to select a value from the Record Title List.
- **Media** – Click the Ellipse Button to select a Media Code from a list, or enter it manually.
- **Comments** – An unlimited text field for additional information about a box. Word documents or spreadsheets can be pasted here.

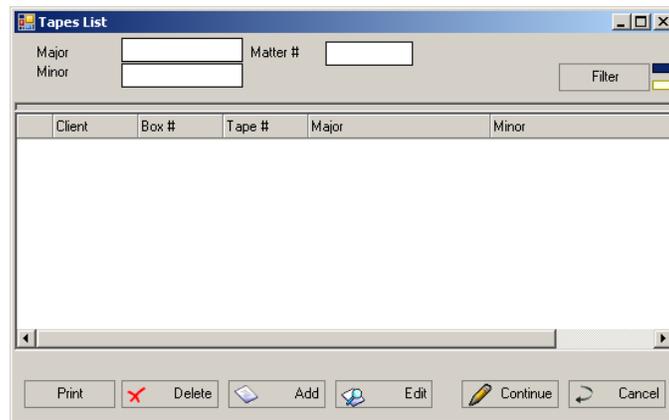
- **Folders** – To add, edit, or search folders for a particular box, click on the **Folders** button in the Current Box Screen (Fig.41 , above) to access the Folders List Screen (right). For more information about managing folders, see Chapter 6 – Folders.

Fig. 42



- **Tapes** – To add, edit, or search tapes for a particular box, click on the **Tapes** button in the Current Box Screen (Fig.41 , above) to access the Tapes List Screen (right). For more information about managing tapes, see Chapter 7 – Tapes.

Fig. 43



## Entering New Boxes

New boxes may be entered into Archive manager in either of two ways; either

- manually, or
- using a Portable Bar Code Reader.

While it is possible to handle large numbers of boxes without the use of bar coding, bar coding greatly reduces handling time and likelihood of error. The RMS Portable Bar Code Reader has advanced ergonomic features, is extremely cost-efficient, and is highly recommended.

While this chapter deals with boxes both with and without bar code labels, detailed instructions about the use of the RMS Portable Bar Code Reader will be found in Chapter 19, *The Portable Bar Code Reader*.

After you have entered the setup information described in Chapters 2 and 3, you are ready to begin entering client's boxes. You cannot begin this process before this point.

## Receiving and Stowing Bar Coded Boxes

This process assumes that a bar code label has been attached to the front each arriving box. Labels must generally be printed before the pick up, and can be placed on the boxes either by the client, or by your driver at your or the client's location.

## Entering Bar Coded Boxes Manually

### THE NEW BOX SCREEN

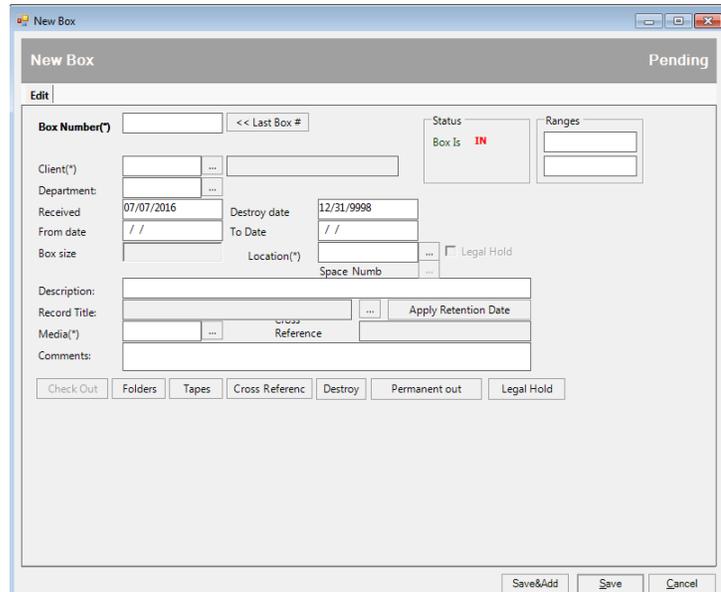
Boxes are entered into the Archive Manager system using the New Box Screen (*right*). To access this screen, press the Add button on The Maintain Boxes Screen (*Fig. 25*, above).

Fields on this screen with asterisks are **required fields**.

You can add folders at the same by pressing the **Folders** button. To see information about how to enter folders, see *Chapter 6, Folders*.

After filling the fields on the screen, click either the **Save&Add** button or the **Save** button.

*Fig. 44*



## Checking Boxes In and Out Manually

Boxes may be checked in or out either of two possible ways:

- automatically, using the RMS Portable Bar Code Reader to scan data, or
- manually, using Archive Manager's *Box Check Out Screen* (*Fig. , below*).

Use of the RMS Portable Bar Code Reader is discussed in *Chapter 19*; the present discussion will deal only with Manual check in and check out.

Manual check in or check out may be performed individually by box or groups.

## Check In or Out Single boxes

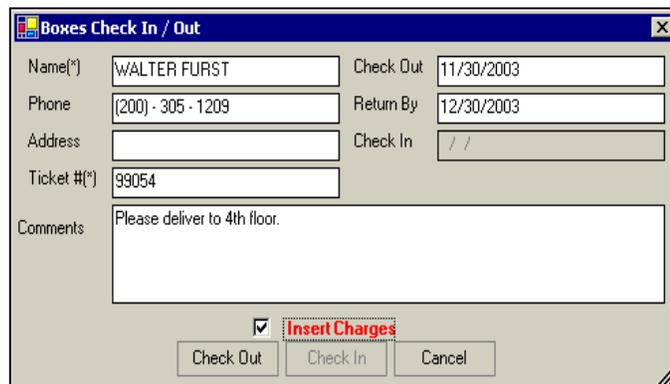
### THE BOX CHECK IN/OUT SCREEN

Select a box on the Current Box Screen (*Fig. 40*, above). Click the **Check In** or **Check Out** button to access the Box Check In/Out Screen (*right*).

Fill in the fields on this screen as follows:

- **Name** (required) – person placing order.
- **Phone** – phone number of person placing order.

*Fig. 45*



- **Address** – the address where box(es) should be picked up or delivered, as specified by customer.
- **Ticket #** (required) – the ticket or work order number.
- **Check Out** – the date of work (default: current date).
- **Return By** – the date of expected return (default: current date plus 30 days).
- **Check in** – the actual date of check in (default: current date).
- **Comments** – an unlimited alphanumeric text field.
- **Insert Charges** – see below, on this page.

## Check In or Out Multiple boxes

There are two possible ways of checking multiple boxes in or out:

- **Selecting multiple boxes for immediate check in/out**

Using either a previously created list or the Maintain Boxes Screen (*Fig. 25*, above), select a group of multiple boxes, then right-click and choose **check in** or **check out**. Then use the Box Check In/Out screen to immediately check in/out boxes.

- **Marking a selection of boxes for check in or check out**

Select from a list or the Maintain Boxes Screen as above, then right-click the selection and choose **Request for Checkout**. This will mark the selected boxes in yellow, but will **not** bring up the Checkout Screen immediately. You can then filter the requested items to a list, **Select All**, and then right-click to check items in or out.

To remove an item from the above list, right-click it and select **Remove from Current List**.

If the list includes items belonging to multiple clients, when you select Check Out from the action list, a new Box Check In/Out Screen will be displayed for each client.

## THE CHARGE SCREEN

**Insert Charges** – During a check in/out operation, whenever this box is checked, the Charge Screen (*right*) will appear after the Check Out button is clicked. This screen is similar in function to the New Charge Screen, which will be discussed in *Chapter 10, Billing*, and allows you to create billing “on the fly”.

The screenshot shows a software window titled "Charge". It contains the following fields and controls:

- Charge Type: Current (dropdown menu)
- Client: LEVEN (text input)
- Department: (text input with ellipsis)
- TicketNumber: 99054 (text input)
- TicketDate: 11/30/2003 (date picker)
- BillingCode(\*): (text input with ellipsis)
- Description: (text input)
- Billing Rate: 0 (text input)
- Quantity: 1 (text input)
- Tax Rate: 0.0825 (text input)
- Amount: 0 (text input)
- Taxable:  (checkbox)
- Sales Tax: 0 (text input)
- Total: 0 (text input)

Buttons on the right side include Continue (with a pencil icon), Cancel (with a circular arrow icon), and Save&Add.

*Fig. 46*

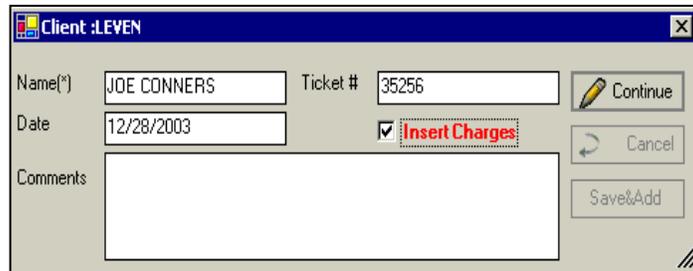
## Destroying or Removing Single Boxes

The **Box Destruction** process indicates to Archive Manager that a single box or group of boxes is to be destroyed or permanently removed from storage. Boxes may be destroyed individually or in groups.

### THE REMOVE/DESTROY DIALOGUE SCREEN

While viewing a box on the Current Box Screen, click the **Destroy** or **Permanent Out** button to access the Remove/Destroy Dialogue Screen.

The dialogue box contains the following fields:



The screenshot shows a dialog box titled "Client :LEVEN". It has the following fields and controls:

- Name(\*): Text box containing "JOE CONNERS"
- Ticket #: Text box containing "35256"
- Date: Text box containing "12/28/2003"
- Insert Charges: A checked checkbox with the text "Insert Charges" in red.
- Comments: A large empty text area.
- Buttons: "Continue" (with a pencil icon), "Cancel" (with a circular arrow icon), and "Save&Add".

Fig. 47

- **Name** (required) – the person authorizing destruction or permanent removal.
- **Date** – the date of the transaction (defaults to today's date).
- **Ticket #** (required) – the ticket or work order number.
- **Insert Charges** – click the box to create billing for this activity.

If the **Insert Charges** the New Charge screen appears (see *Chapter 10 – Billing*) and the billing can be generated “on the fly”.

## Destroying or Removing Multiple Boxes

In the Maintain Boxes Screen (*Fig. 35*), either use an existing list, or select a group of boxes. Right-click the selection and select **Destroy Boxes** or **Permanent Out**, as desired, from the action list.

If desired, click the **Insert Charges** box to create billing for this activity.

After permanently removing or destroying boxes, it is important to run the **Destruction Process Reports**:

- Certificate of Destruction Report
- Destruction Summary Report
- Destruction Pull List
- Destruction Empty Spaces Report

These are described in detail in *Chapter 14, Reports*

### UTILITIES

When multiple items are highlighted in the Maintain Boxes Screen, right-clicking accesses a **Utilities Menu**. The use of these utilities is discussed in *Chapter 18, Utilities*.

## Legal Hold

If a box is on legal hold, then it cannot be permanently removed, destroyed, or deleted. It can be edited, checked out, etc. A user with full rights to edit boxes can place boxes on legal hold; however only the superuser password can remove boxes from legal hold.

Boxes can be placed on Legal Hold via 2 methods:

1. By editing a box and clicking Legal Hold button on bottom right. After placing on Legal Hold, the check box will appear in the Box Edit screen.
2. Or filter a list of boxes and right click and choose **Put on Legal Hold**.

In both cases after selecting boxes to put on legal hold a dialogue box appears

Field explanations  
 Date on hold - date field  
 Who put on hold – 20 characters  
 Legal matter No. – 5 lines - 20 characters - only first line required

Fig. 48

If a box is on Legal Hold, the Legal Hold button will be checked. You can see who put a box on legal hold by clicking the Legal Hold button in the box edit screen

To remove a box or boxes from legal hold, either:

1. Edit a box and click the Legal Hold button, which pops up the dialogue box and click Remove Legal Hold
2. Right click and choose **Remove from Legal Hold**.

**Note** – Only the superuser password can remove boxes from Legal Hold.

**Note** - if a box or boxes are on Legal Hold you will receive a warning that these boxes cannot be destroyed or permanently removed when trying to perform those operations. Fig. 49

There is a report available for boxes on legal hold in the base group of reports.

Filters:  
 Customer # equals sample

**Box inventory**

Print date: 5/15/2017  
 Page 1 / 1

Box number	Box contents / description	Location	Checked out / to	Beginning date	Ending date	Date received	Cross Ref.	Record Title	Date on Hold /Who	Legal Matter #
317	GENERAL LEDGER	1903-22-2		11/11/2004	12/11/2004	8/12/2001	501		5/14/2017 BRIAN JOHNS	765433-099
620117	GENERAL LEDGER	14-A-019		3/1/2009	6/11/2009	8/16/2010		GL	5/14/2017 BRIAN JOHNS	765433-099
620118	GENERAL LEDGER	14-A-019		7/1/2009	9/30/2009	8/16/2010		GL	5/14/2017 BRIAN JOHNS	765433-099

No of boxes for dept ACCT:3

## Chapter 6 – Folders

### Maintaining Stored Folders

#### THE MAINTAIN FOLDERS SCREEN

The Maintain Folders Screen (right) displays the status of stored folders and provides access to sub-screens for various folder management activities. To access this screen, click the **Maintain Tab** on the Activity Pane to select the Maintain Panel, and then click **Folders**. Or, you may click **Maintain > Folders** from the Menu Bar.

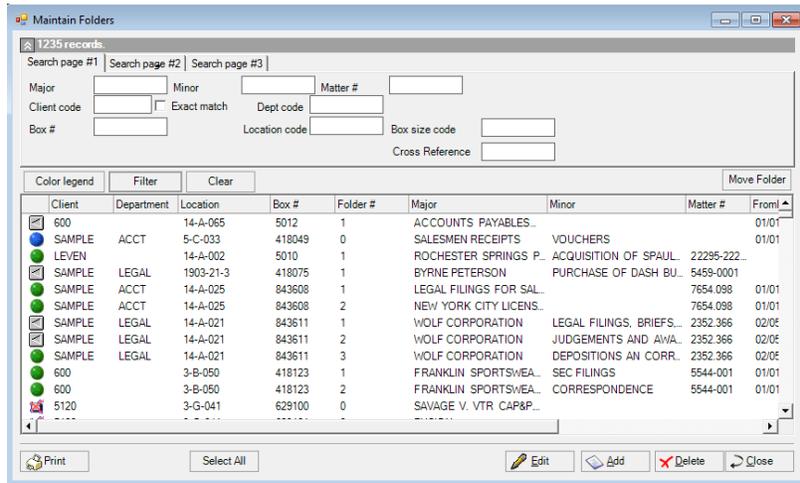


Fig.50

The status of each folder is represented by a Folder Status symbol in Column 1 of the display. The symbol meanings are as follows:

- **Green dot** – folder is currently in the record center.
- **Gray left arrow** – folder has been checked out.
- **Blue dot with red X** – box has been destroyed.
- **Gray hollow right arrow** – box has permanently been removed
- **Yellow/gray dot** – box has been requested for check out via Web Access.
- **Blue dot** – box containing this folder has been checked out.

This screen is similar to the Maintain Boxes Screen and contains many of the same fields, but the fields are mapped specifically for folder information.

The filters on this screen are as follows:

- **Major** – (50 characters alphanumeric) general description of folder (i.e., ABC Co. vs. XYZ Co.)
- **Minor** – (50 characters alphanumeric) Detail of folder contents (i.e., Depositions for ABC Co.)
- **Matter #** - (20 characters alphanumeric) typically the file number
- **Client Code** – Client's identifier code – click Exact Match to match the client code exactly
- **Department code** – Client's department identifier code
- **Box number** – 9 position numeric field. This refers to the box containing the subject folders.
- **Location code** – the location of the folder
- **Cross reference** – cross reference

## Search page #2

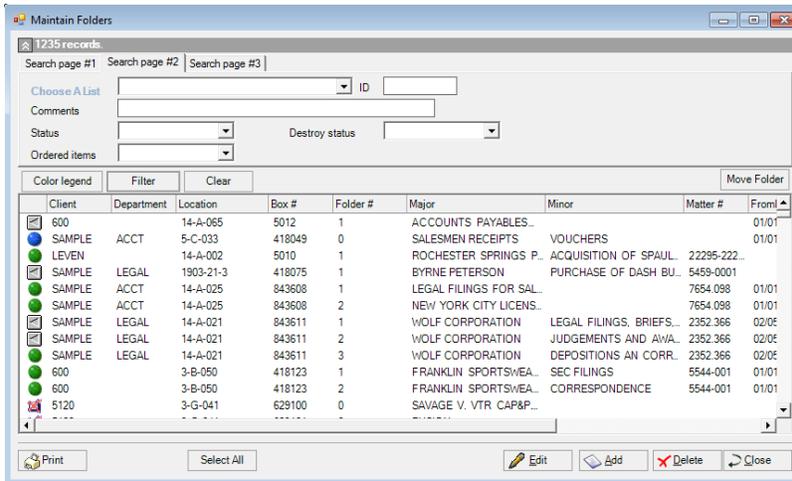
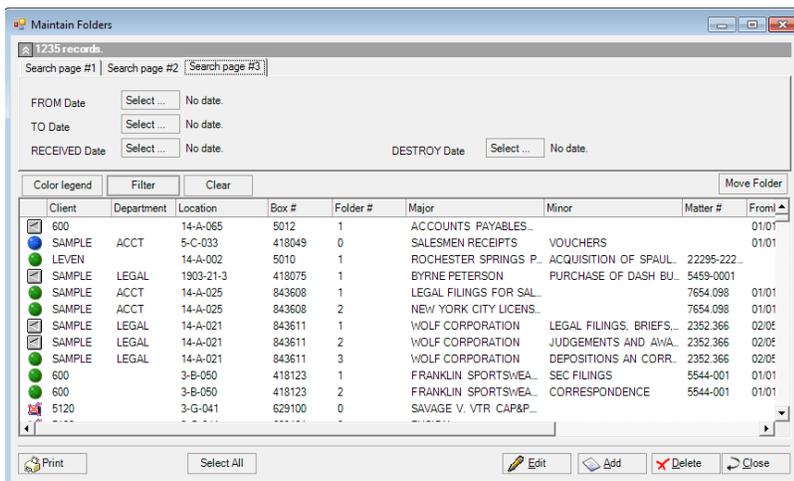


Fig. 51

The fields on Search page #2 are as follows:

- **Choose A List** – Allows you to select an existing list. (When you use a filter, the resulting selection can be saved to a list that you can use to access those items quickly, as explained in *Chapter 7 – Lists*.) The quickest way to find a specific folder on this screen is by filtering a list.
- **ID** – (20 characters alphanumeric) usually a partner's name or initials.
- **Comments** – unlimited additional text.
- **Status** – Pull down filter containing a scroll menu. The menu gives you a choice of:
  - ❖ All folders
  - ❖ Checked Out folders
  - ❖ Folders in record center
  - ❖ Requested by All Users
  - ❖ Requested by Current Users
  - ❖ Requested from Web Access
- **Destroyed** - Pull down filter containing a scroll menu. The menu gives you a choice of.:
  - ❖ Live folders
  - ❖ All folders
  - ❖ Destroyed
  - ❖ Permed out



## Search page #3

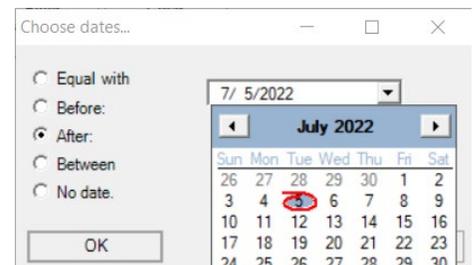


Fig. 52

The fields on Search page #3 are as follows:

- **From date** – click select to bring up the calendar to select the folder from date.
- **To date** – click select to bring up the calendar to select the folder to date.
- **Received date** – click select to bring up the calendar to select the folder received date.
- **Destroy date** – click select to bring up the calendar to select the folder destroy date.

## Entering new folders

### THE NEW FOLDER SCREEN

To enter new folders, click the **Add Button** to access the New Folder Screen (*right*). This screen contains the following fields (the fields marked with asterisks are required):

- **Box Number** – may be entered manually or, by clicking the ellipse, from the pull down list. A current valid box number must be entered, as folders are a subset of the boxes that contain them.
- **Company** – Client Code, automatically populated when the box number is entered.
- **Department** – (10 position alphanumeric) department code, which may be entered manually or, by clicking the ellipse, from the pull down list.
- **Folder Number** – (four digits) populated automatically, but may be changed manually.

Fig. 53



**NOTE:** Because each box has unique folder numbers, the Add Folder Screen cannot be saved if a duplicate folder number is manually entered..

- **ID** – (10 position alphanumeric) typically, the last name or initials of the person responsible for this folder, such a manager or corporate officer in the client company.
- **Matter #** – 13 characters alphanumeric) Case Numbers (Law Firms), Patient Numbers (Hospitals), Claim Numbers (Insurance Companies), etc.
- **Received Date** – (date field) date folder is received into the record center.
- **Destroy Date** – (date field, automatically populated from box data) month, day, and year this folder is eligible for destruction.
- **From Date** – (date field) used in conjunction with To Date to indicate time period of the records in folder.
- **To Date** – as described above.
- **Major Description** – a general description of folder.
- **Minor Description** – a detailed description of folder contents.

- **Comments** – (unlimited text field) use to input additional information about the folder; you can paste Word documents or spreadsheets here.
- **Location Code** – the location of box containing this folder automatically populated from box information.
- **Space on Shelf** – the code for specific space occupied by box.
- **Folder is In/Out** – reports whether folder is currently in the recorder center.
- **ID** – initials or last name of the client representative responsible for the folder.
- **Box #** – box number(s) in which the subject folder(s) are stored.
- **Matter #** – the client's file number
- **Client Code** – as previously explained
- **Cross Reference** – press this button to access the Folder Cross Reference List (*right*).

Cross referencing is used when a box or folder is known by more than one reference number. This can occur, for example, when your record center absorbs boxes from another center, or needs to renumber the customer's boxes for any reason.

You can add unlimited cross references, which are typically client's file numbers. Only the first cross reference is displayed on the Folder Edit Screen, but all the cross references are searchable.

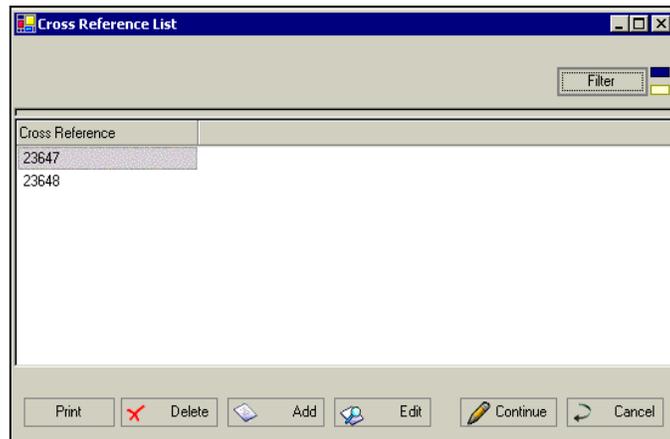


Fig. 54

- **Filtering** – applies a filter to your list. Folders can be filtered just like boxes, with single or multiple filters.

An example of the use of multiple filters would be if a law office set the Client filter = LEVEN, the Major filter = OPEL, and the Minor filter = REAL ESTATE, to find the Opel Industries Real Estate Closing for customer Leven.

Remember that the wildcard character is %. As with all Archive Manager lists, query results may be sorted by clicking on the column heading.

## THE CURRENT FOLDER SCREEN

Folder information is edited on the Current Folder Screen (*right*). To edit a folder on this screen, either double click the folder on the Maintain Folders Screen (Fig. 50, above), or select it and click **Edit**. A quick way to find a specific folder on the Maintain Folders Screen is by filtering a list.

The fields and field descriptions on the Current Folder Screen are identical to those on the New folder Screen, Fig. 53, above.

Fig. 55

The screenshot shows a window titled "Current Folder" with a status bar indicating "Active". The window contains an "Edit" tab and several input fields:

- BoxNumber: 343688
- Company: ROYAL
- Department: [Empty]
- Received Date: 09/09/1993
- From Date: 05/31/1986
- Major Description: IRS AUDIT
- Minor Description: 5/31/86
- Cross Reference: 23647
- Comments: [Empty text area]
- Folder Number(\*): 1
- Matter NO: [Empty]
- Location Code: 5-O-035
- Destroy Date: 12/31/9998
- To Date: 05/31/1986
- Space On Shelf: 1
- Status: Folder Is IN

Buttons at the bottom include "Check Out", "Cross Reference", "Destroy", "Out", "Save&Add", "Save", and "Cancel".

## Checking Folders In and Out

### THE FOLDERS CHECK IN/OUT SCREEN

Click the **Check Out** button on the Current Folder screen to access the Folders Check In/Out Screen.

This screen is identical in functionality to the Boxes Check In/Out Screen (Chapter 5, Fig 45. ). The process for checking folders in and out is identical as well. See Chapter 5 for a review of the subject.

The screenshot shows a window titled "Folders Check In/Out" with the following fields:

- Name(\*): [Empty]
- Phone: 0 - -
- Address: [Empty]
- Ticket #(\*): [Empty]
- Comments: [Empty text area]
- Check Out: 12/21/2003
- Return By: 01/20/2004
- Check In: / /

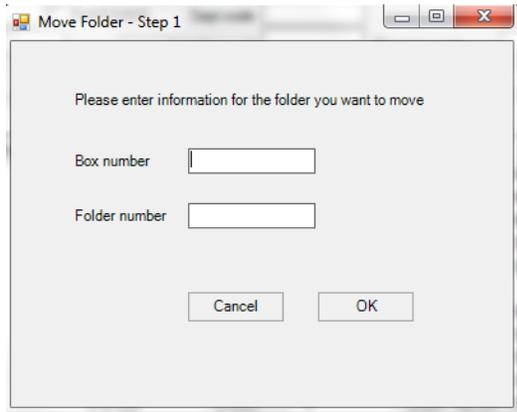
There is a checkbox for "Insert Charges" which is currently unchecked. Buttons at the bottom include "Check Out", "Check In", and "Cancel".

Fig. 56

### THE FOLDER DESTRUCTION PROCESS

The **Folder Destruction** process indicates to Archive Manager that a single folder or group of folders is to be destroyed or permanently removed from storage. However, since storage fees are not charged for folders but only for the boxes that contain them, folders are usually not destroyed individually but rather, along with their boxes. The screens and processes used for destroying folders are identical to those for boxes. Please see *Chapter 5, The Box Destruction Process*, to review the procedures.

## Move folders utility

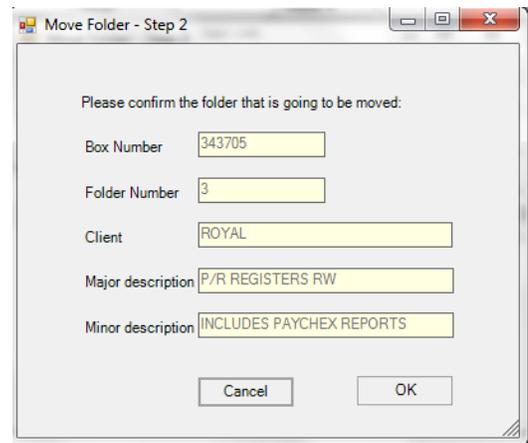


Step 1 - Click **Move Folder** on the far top right of the Maintain Folders list and the Step 1 dialogue box appears. Fill in a box number and a folder number. Then click OK.

*Fig. 57*

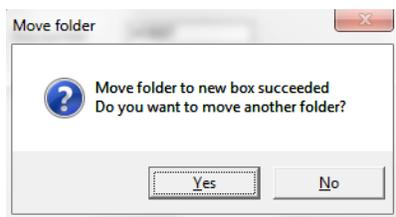
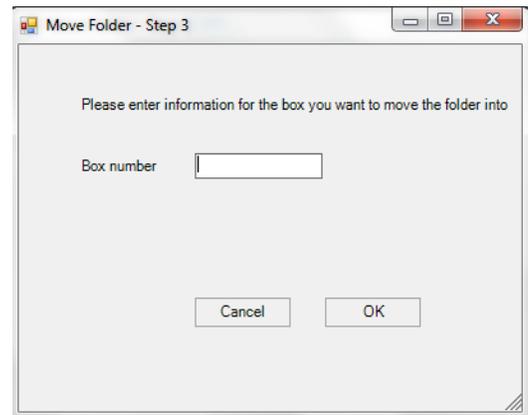
Step 2 – This is a confirmation that you have selected the correct folder. If so, click OK.

*Fig. 58*



Step 3 – Enter the box number that the folder is being moved to. Archive Manager will automatically assign the next available folder number in that box to this folder. Then click ok and you will then see a pop up message that the folder has been successfully moved.

*Fig. 59*



*Fig. 60*

If you wish to move additional folders, click OK.

If you continue to move folders, Step 3 will remember the last box number that you wish to move folders to. If this folder is for the same box, just click OK. Or change the box number.

**Folder Checked Out** – If a folder is checked out, a warning will pop up asking if you want to check it in. If you click Yes, then the standard Archive Manager check in dialogue box will appear. This will also update the Audit Trail in the tab Folder I/O.

**Folder Destroyed or Permed Out** – If a folder is destroyed or permed out, a warning will pop up asking if you want to recall it in. If you click Yes, then the folder status will be updated to live. This will also update the Audit Trail in the tab F History.

## Chapter 7 – Tapes

### Maintaining Tapes

#### THE MAINTAIN TAPES MODULE

To access the Maintain Tapes module, click the *Maintain Tab* on the Activity Pane to select the Maintain Panel, and then click *Tapes*. Or, you may click *Maintain > Tapes* from the Menu Bar.

#### Search page #1

Client	Location	Box #	Tape #	Major	Minor	Matter #	ToDate	Check Out
●	SAMPLE	TAPES 1	<boxless>	134				
●	SAMPLE	TAPES 1	<boxless>	1	MONTHLY BACKUP		10/31/2004	
●	SAMPLE	TAPES 1	<boxless>	10	MONTHLY BACK UP		04/30/2004	
●	SAMPLE	TAPES 1	<boxless>	11	MONTHLY BACK UP	ACL00000..	05/30/2004	
●	SAMPLE	TAPES 1	<boxless>	12	MONTHLY BACK UP		06/30/2004	
●	SAMPLE	TAPES 1	<boxless>	13	MONTHLY BACK UP		07/31/2004	
●	SAMPLE	TAPES 1	<boxless>	14	MONTHLY BACK UP		08/31/2004	
●	SAMPLE	TAPES 1	<boxless>	15	MONTHLY BACKUP		09/30/2004	
●	SAMPLE	TAPES 1	<boxless>	16	MONTHLY BACKUP		10/31/2004	
●	SAMPLE	TAPES 1	<boxless>	18	MONTHLY BACK UP		01/31/2005	
●	SAMPLE	TAPES 1	<boxless>	19	MONTHLY BACKUP		02/28/2005	
●	SAMPLE	TAPES 2	<boxless>	20	MONTHLY BACKUP	7654		JOHN
●	SAMPLE	TAPES 2	<boxless>	21	MONTHLY BACKUP	7654		
●	SAMPLE	TAPES 2	<boxless>	343	MONTHLY BACKUP		05/31/2005	
●	SAMPLE	TAPES 4	<boxless>	344	MONTHLY BACKUP		06/30/2006	

Fig. 61

The Maintain Tapes module consists of three screens or pages. These screens display the status of stored tapes, and provide access to sub-screens for various tape management activities.

Upon opening, the Maintain Tapes module defaults to Search page #1 (*above*). The status of each Tape is represented by a *Tape Status symbol* in Column 1 of the display. The symbol meanings are as follows:

- **Green dot** – Tape is currently in the record center.
- **Gray left arrow** – Tape has been checked out.
- **Yellow dot** – Tape has been requested for check out.
- **Blue dot with red X** – Tape has been destroyed
- **Gray right arrow** – Tape has been permanently removed
- **Blue dot** – box containing this tape has been checked out

This screen is similar to the Maintain Folders Screen and contains many of the same fields, but the fields are mapped specifically for Tape information.

The fields on Search page #1 are as follows:

- **Client Code** – Client’s identifier code. – Click Exact Match to match the client code exactly.
- **Minor** – (50 characters alphanumeric) Detail of Tape contents (i.e., Depositions for ABC Co.)
- **Dept code** – A client’s department code
- **Major** – (50 characters alphanumeric) general description of Tape (i.e., ABC Co. vs. XYZ Co.)
- **Location code** – Location of the tape
- **Box number** – Reference number of box containing the subject Tapes.
- **Tape number** – Reference number of tape
- **Box size code** – Code indicating size of above box
- **Next rotation date** – the next scheduled rotation date (a date picker tool appears when you click the checkbox).
- **Tape type** - nomenclature for tape (i.e. MT or Mag Tape for Magnetic Tape)
- **Cross reference** – cross reference

### Search page # 2

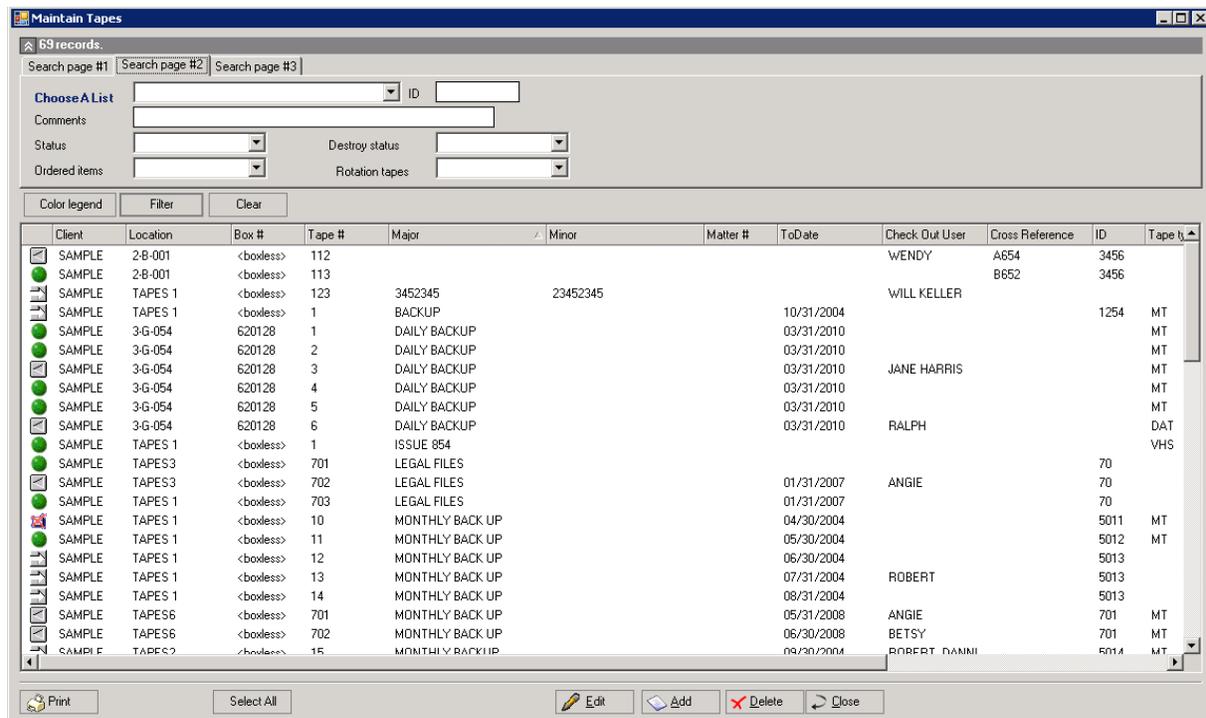


Fig. 62

The fields on Search page #2 are as follows:

- **Choose A List** – Allows you to select an existing list. (When you use a filter, the resulting selection can be saved to a list that you can use to access those items quickly, as explained in *Chapter 8 – Lists*.) The quickest way to find a specific Tape on this screen is by filtering a list.
- **ID** – tape ID
- **Comments** – unlimited text field
- **Status** – Pull down filter containing two scroll menus. The upper menu gives you a choice of:
  - ❖ All Tapes
  - ❖ Checked Out Tapes
  - ❖ Requested by All Users Tapes

- ❖ Requested by Current Users Tapes
- ❖ Requested from Web Access Tapes
- **Destroy status** – live tapes or all tapes
- **Ordered items** – tapes from unprocessed orders or all tapes
- **Rotation tapes** – today's items or all

### Search page # 3

The screenshot shows the 'Maintain Tapes' application window. At the top, there are search filters for 'FROM Date', 'TO Date', 'RECEIVED Date', and 'DESTROY Date', each with a 'Select...' button and 'No date.' text. Below the filters is a table with columns: Client, Location, Box #, Tape #, Major, Minor, Matter #, ToDate, Check Out User, Cross Reference, ID, and Tape type. The table contains 20 rows of data, including entries for 'SAMPLE' and 'TAPES' with various dates and users. To the right of the table, a 'Choose dates...' dialog box is open, showing a calendar for July 2022. The date '7/ 5/2022' is selected in the dialog, and the number '6' is circled in the calendar grid. The dialog also has radio buttons for 'Equal with', 'Before:', 'After:', 'Between', and 'No date.', and an 'OK' button.

Client	Location	Box #	Tape #	Major	Minor	Matter #	ToDate	Check Out User	Cross Reference	ID	Tape type
SAMPLE	2-B-001	<boxless>	112					WENDY	A654	3456	
SAMPLE	2-B-001	<boxless>	113						B652	3456	
SAMPLE	TAPES 1	<boxless>	123	3452345	23452345			WILL KELLER			
SAMPLE	TAPES 1	<boxless>	1	BACKUP			10/31/2004			1254	MT
SAMPLE	3-G-054	620128	1	DAILY BACKUP			03/31/2010				MT
SAMPLE	3-G-054	620128	2	DAILY BACKUP			03/31/2010				MT
SAMPLE	3-G-054	620128	3	DAILY BACKUP			03/31/2010	JANE HARRIS			MT
SAMPLE	3-G-054	620128	4	DAILY BACKUP			03/31/2010				MT
SAMPLE	3-G-054	620128	5	DAILY BACKUP			03/31/2010				MT
SAMPLE	3-G-054	620128	6	DAILY BACKUP			03/31/2010	RALPH			DAT
SAMPLE	TAPES 1	<boxless>	1	ISSUE 854							VHS
SAMPLE	TAPES3	<boxless>	701	LEGAL FILES						70	
SAMPLE	TAPES3	<boxless>	702	LEGAL FILES			01/31/2007	ANGIE		70	
SAMPLE	TAPES 1	<boxless>	703	LEGAL FILES			01/31/2007			70	
SAMPLE	TAPES 1	<boxless>	10	MONTHLY BACK UP			04/30/2004			5011	MT
SAMPLE	TAPES 1	<boxless>	11	MONTHLY BACK UP			05/30/2004			5012	MT
SAMPLE	TAPES 1	<boxless>	12	MONTHLY BACK UP			06/30/2004			5013	
SAMPLE	TAPES 1	<boxless>	13	MONTHLY BACK UP			07/31/2004	ROBERT		5013	
SAMPLE	TAPES 1	<boxless>	14	MONTHLY BACK UP			08/31/2004			5013	
SAMPLE	TAPES6	<boxless>	701	MONTHLY BACK UP			05/31/2008	ANGIE		701	MT
SAMPLE	TAPES6	<boxless>	702	MONTHLY BACK UP			06/30/2008	BETSY		701	MT
SAMPLE	TAPES?	<boxless>	15	MONTHLY BACK UP			09/30/2004	ROBERT DAMMI		5014	MT

Fig 63

The fields on Search page #3 are as follows:

- **From date** – click select to bring up the calendar to select the folder from date.
- **To date** – click select to bring up the calendar to select the folder to date.
- **Received date** – click select to bring up the calendar to select the folder received date.
- **Destroy date** – click select to bring up the calendar to select the folder destroy date.

## Entering new Tapes

### THE NEW TAPE SCREEN

To enter new tapes, click the **Add Button** to access the New Tape screen (*below*).

The screenshot shows a 'New tape' window with the following fields and controls:

- Box number:** Input field with a pull-down arrow.
- Tape Number (\*):** Required input field.
- ID:** Input field.
- Space on shelf:** Input field with value '0'.
- Company:** Input field with a pull-down arrow.
- Department:** Input field with a pull-down arrow.
- Received Date:** Input field with value '02/13/2005'.
- Major Description:** Input field.
- Minor Description:** Input field.
- Cross Reference:** Input field.
- Tape type:** Input field.
- Next rotation:** Input field with value '11'.
- Rotation days:** Input field with value '0'.
- Comments:** Text area.
- Vital:** Check box.
- Matter No.:** Input field.
- Location code:** Dropdown menu with '< null value >'.
- Destroy Date:** Input field with value '12/31/9998'.
- To Date:** Input field with value '11'.
- Status:** Displayed as 'Tape Is IN'.
- Buttons:** 'Check out', 'Cross Reference', 'Destroy', 'Out', 'Save&Add', 'Save', 'Cancel'.

Fig. 64

This screen contains the following fields (the fields marked with asterisks are required):

- **Box Number** – Optional: may be entered manually or, by clicking the ellipse, from the pull down list.



**NOTE:** A Current Box number is not mandatory, since Tapes can be stored on open shelves without boxes..

- **Company** – Client Code, automatically populated when the box number is entered.
- **Department** – (10 position alphanumeric) department code, which may be selected from a pull down list by clicking the ellipse.
- **Tape Number** – (three digits) populated automatically, but may be changed manually.



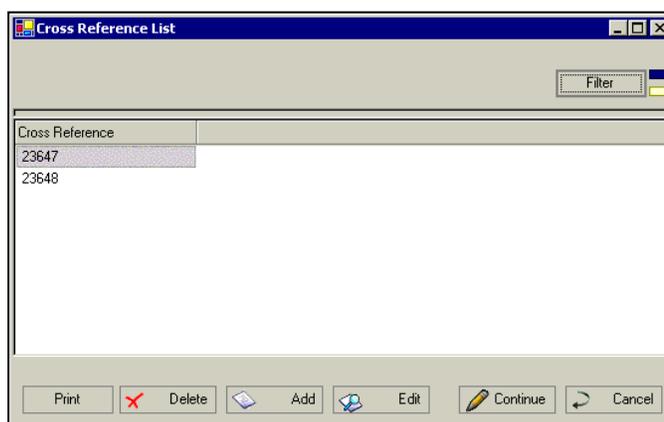
**NOTE:** Because each box has unique Tape numbers, the Add Tape Screen cannot be saved if a duplicate Tape number is manually entered..

- **ID** – (10 position alphanumeric) typically, the last name or initials of the person responsible for this Tape, such a manager or corporate officer in the client company.
- **Matter No.** – (13 characters, alphanumeric) may contain legal case numbers, medical patient numbers, insurance claim numbers, etc.
- **Received Date** – (date field) date Tape was received into the record center.

- **Destroy Date** – (date field, automatically populated from box data) month, day, and year this Tape is eligible for destruction.
- **From Date** – (date field) used in conjunction with To Date to indicate time period of the records in Tape.
- **To Date** – as described above.
- **Major Description** – a general description of Tape.
- **Minor Description** – a detailed description of Tape contents.
- **Tape type** – In-house codes can be used to designate the type of tape media, i.e. MT for magnetic tape, DAT for DAT cartridge, CD if it is a CD, etc.
- **Next rotation date** – the next scheduled day for rotation of this tape.
- **Rotation days** – how often (in days) this tape should be rotated.
- **Comments** – (unlimited text field) use to input additional information about the tape. Word documents or spreadsheets can be pasted here.
- **Location Code** – the location of box containing this tape; populated automatically from box information if the tape is part of a box or the open location of a tape not stored in a box.
- **Cross Reference** – press this button to access the Tape Cross Reference List (*right*).

Cross referencing is used when a box or Tape is known by more than one reference number. This can occur, for example, when your record center absorbs boxes from another center, or needs to renumber the customer's boxes for any reason.

Fig. 65



An unlimited number of cross references – typically, client's file numbers.

Only the first cross reference is displayed on the Tape Edit Screen, but all the cross references are searchable.

- **Filtering** – applies a filter to your list. Tapes can be filtered just like boxes or folders, with single or multiple filters.

Remember that the wildcard character is %. As with all Archive Manager lists, query results may be sorted by clicking on the column heading.

## THE CURRENT TAPE SCREEN

The screenshot shows a window titled "Current tape" with a status bar indicating "Active". The window contains several input fields and buttons:

- Box number:** 4000
- Tape Number(\*):** 2
- ID:** 4
- Company:** LEVEN
- Department:** (empty)
- Received Date:** 04/19/2004
- From Date:** 12/01/2003
- Major Description:** SYSTEM BACK UP
- Minor Description:** 1234
- Cross Reference:** (empty)
- Tape type:** (empty)
- Comments:** 123412341234
- Vital:**
- Space on shelf:** 1
- Matter No.:** (empty)
- Location code:** < null value >
- Destroy Date:** 12/31/9998
- To Date:** 12/31/2003
- Status:** Tape Is **IN**
- Next rotation:** 12/31/9998
- Rotation days:** 0

Buttons at the bottom include "Check out", "Cross Reference", "Destroy", "Out", "Save&Add", "Save", and "Cancel".

Fig. 66

To edit information about a tape, either double click the item on the Maintain Tapes screen (Fig. ), or select it and click *Edit*.

The Current Tape screen appears (above).

The quickest way to find a specific tape on the Maintain Tapes screen is by filtering a list.

The fields and field descriptions on this screen are identical to those on the New Tape screen, above.

## Checking Tapes In and Out

### THE TAPES CHECK IN/OUT SCREEN

Click the **Check Out** button on the Current Tape screen to access the Tapes Check In/Out screen (right).

This screen is identical in functionality to the *Boxes Check In/Out Screen* (Chapter 5, Fig.45 ). The process for checking Tapes in and out is identical as well. See Chapter 5 for a review of the subject.

Fig. 67

The screenshot shows a window titled "Tapes Check In/Out" with the following fields and buttons:

- Name(\*):** (empty)
- Phone:** () - -
- Address:** (empty)
- Ticket #(\*):** (empty)
- Comments:** (empty text area)
- Check Out:** 02/13/2005
- Return By:** 03/15/2005
- Check In:** / /
- Buttons:** << NEXT, Check Out, Check In, Cancel
- Insert Charges:**

For detailed instructions about Tape Reports, see *The Tape Group* on Page 95 in Chapter 14, *Reports*.

## Chapter 8 – Lists

Lists are an extremely useful way to organize and expedited check outs, destruction processing, permanent removals, and other repetitive tasks. See *Using Lists*, below, for specific uses.

### Managing Lists

#### THE MANAGE LISTS SCREEN

The Manage Lists Screen (*right*), displays a list of existing lists from which you can...

- use filters to find a specific list,
- select a list to print, edit, or delete, or
- create a new list.

To access this screen, select the Maintain Panel on the Activity Pane and choose Lists, or click **Maintain > Lists** on the Menu Bar.

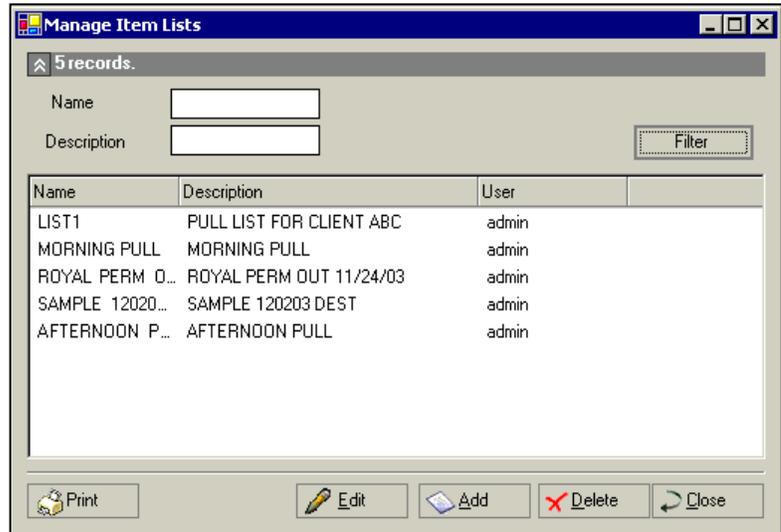


Fig. 68

### Creating Lists

#### THE NEW LIST SCREEN

To create a new list, click the **Add** button on the Manage Lists Screen (*Fig. 1*, above). On the New List Screen (*right*), enter a name and description for the new list, then click **Save**, or **Save & Add**.

#### ADDING ITEMS TO A LIST

To add an item to a list in the Maintain Box or Folder screen:

1. Select a single or multiple items, or click **Select All**.
2. If selecting more than one item, hold down the <Ctrl> key.
3. Right click the selection and choose **Add to List**.
4. Click the list to which you want your selection to be added.
5. To view the expanded list, click **Choose a List**, on the Maintain Box or Folder screen, select the list to which the items were added, and click **Filter**.

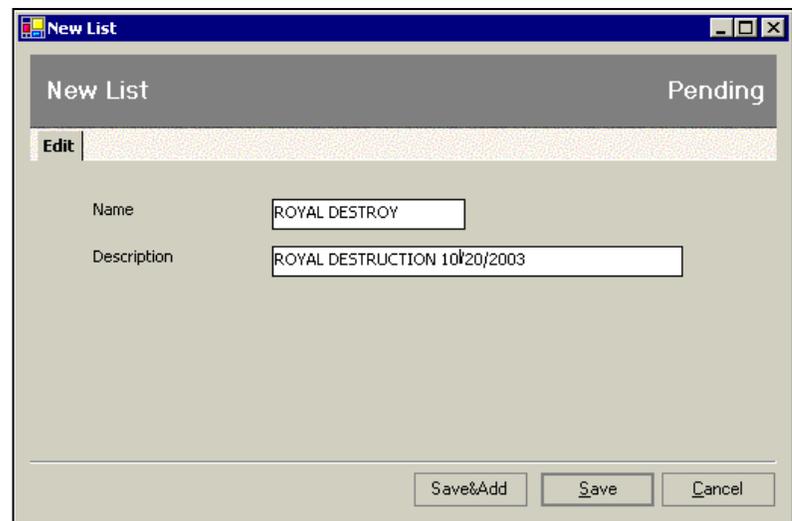


Fig. 69

## Using lists

As mentioned previously, lists may be used for various tasks that can enhance your customer's sense of security while promoting the efficiency and profitability of your operation.

- **Repeated or periodic activities** – By saving the result of a filter process, a list can save you the effort of repeating that process when the same selection is required again. For example, in daily check out of boxes or folders, you may want to create a Pull List AM and Pull List PM for morning and afternoon retrievals.
- **Destruction or permanent out processes** - You can build a list of items to be destroyed, save it, print it, and review it with your customer or record center management before proceeding with the actual destruction of records. And because lists are automatically saved, you can easily review the items selected for a particular client destruction project at a later time.
- **Searching** – Lists may be filtered, sorted, and/or printed, and items placed in a list remain there until removed.
- **Special projects** – Your customer may need to review a printed list of certain boxes and folders.

Here is an example how you would use a list as in the first bullet, above:

Your client is a builder who needs to show what make and type of roofing material was used in each of several previous projects for pending litigation. At his request, you've pulled a group of boxes from the Maintain Boxes screen (Chapter 5, Fig. 37). Because he may need to refer to other roofing materials from these projects in the future, he has asked you to remember which boxes were pulled, so you will record them to a list, LIST1, as follows:

First, you'll create a new list:

1. go to the New List screen (*Fig. 69*, above);
2. enter the name **LIST1** (and a description) for the new list;
3. then click **Save**.

Then you'll add the requested boxes to the list:

1. go to the **Maintain Boxes** screen;
2. select a box or multiple boxes to add to the list;
3. if selecting more than one box, hold down the <Ctrl> key.
4. right-click the selection and choose **Add to List** from the action menu;
5. add the box(s) to **LIST1**;

A year later, when you need to retrieve the same boxes again:

1. go to the **Maintain Boxes** screen;
2. select **LIST1** in the **Choose a List** scrollbox;
3. click **Filter**.

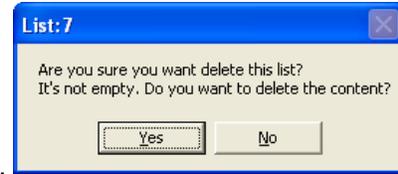
### FILTERING

The filters for Name and Description can assist you in searching for a particular list. Remember that the wildcard character is %, and clicking on a column sorts the list on that column.

### DELETING A LIST

**Warning** - deleting a list results in all items being removed from that list. The steps to delete a list are as follows:

1. Highlight the list you want to delete in Maintain Lists (*Fig. 68*, above)
2. Click the delete key on the bottom of the screen.



If a list has items associated with it you receive a warning message.

Fig. 70

## Creating Lists From Spreadsheets

Using the import Excel spreadsheets typically located in C:\Program Files\RMS\Archive Manager\Settings you can import a list of box numbers, box/folder numbers, and box/tape numbers to generate a list of boxes, folders, or tapes. This is very useful for generating destruction lists for boxes. Have your client give you a list of box numbers to be destroyed.

### Excel Files

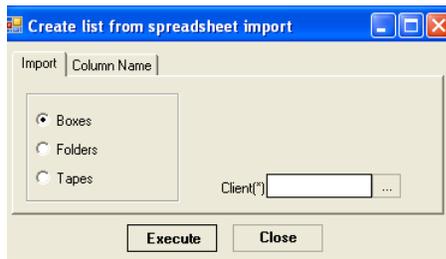
**Boxes** - Import\_BNumber.xls - single column of box numbers

**Folders** - Import\_FNumber.xls – columns of box numbers and folder numbers

**Tapes** - Import\_TNumber.xls – columns of box numbers and tape numbers

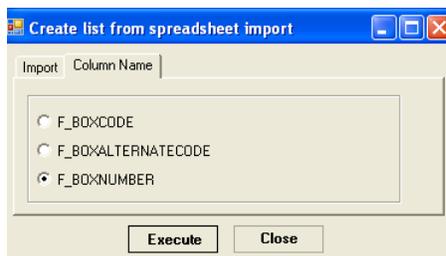
**Note:** These files must remain named .xls.

Pull down **Maintain** from the top menu to **Lists** and over to the right to **Create List from spreadsheet**.



On the **Import** tab select Boxes, Folders, or Tapes. Click the ellipse to select a client. You **cannot** type the client code.

Fig. 71



On the **Column Name** tab select F\_Boxnumber for boxes. If you selected Folders, then you would select F\_Foldernumber/F\_Boxnumber. And if you selected Tape, then you would select F\_Tapenumber/F\_Boxnumber.

Fig. 72

Click the **Execute** button to navigate to where your import file is and import your list.

Filter on Choose a List in boxes, folders, or tapes to view the items. Note if any of these maintain windows are open before importing, you must close that window and reopen it to see the list.

### List Names

**Boxes** - Import\_BNumber

**Folders** - Import\_FNumber

**Tapes** - Import\_TNumber

## Chapter 9 – Quick Search

The Quick Search Panel (*Figure 66*), mentioned briefly in *Chapter 1*, contains a very powerful set of filters that you can use to instantly retrieve information about boxes, folders, locations, and customers.

### Searching for Boxes

The Quick Search Panel is a vertical sidebar with the following sections:

- Boxes:** Fields for Box #, Description, Client, and Cross Ref.
- Folders:** Fields for Box #, Major, Minor, and Client.
- Locations:** Field for Location.
- Customers:** Field for Customer.

At the bottom of the panel are 'Clear' and 'Search' buttons, and an 'Action list' section.

When you search for boxes, you may enter as criteria:

- Box #               \* Client
- Description       \* Cross Reference

These filters may be used individually or in combination. Remember that the wildcard character is %.

For example, if you wanted to find all the boxes marked **General Ledger** for client **Sample**, you would enter **Sample** in the Client field, and **General Ledger** in the Description field.

The result would be the display at right, showing all the records in the system that match our criteria.

Fig. 73

The 'Maintain Boxes' window displays a table of search results. The search criteria are: Client: SAMPLE, Description: GENERAL LEDGER. The results table is as follows:

Box #	Client	Department	Description	FromDate	ToDate
611	SAMPLE	ACCT	GENERAL LEDGER	01/01/2000	06/30/2000
1800	SAMPLE	ACCT	GENERAL LEDGER	07/01/2001	12/31/2001
612	SAMPLE	ACCT	GENERAL LEDGER	01/01/2002	06/30/2002
317	SAMPLE	ACCT	GENERAL LEDGER	07/01/2000	12/31/2000
480	SAMPLE	ACCT	GENERAL LEDGER	07/01/2002	12/31/2002
668	SAMPLE	ACCT	GENERAL LEDGER	01/01/2001	06/30/2001

Fig. 74

Incidentally, if you click the **Print** button on any screen, you'll see a print preview screen like the one in *Fig. ,* below; just click the icon to send the image to your default printer.

The 'Print Preview' window displays a detailed table of search results, including a 'Location' column. The results table is as follows:

Box #	Client	Department	Description	FromDate	ToDate	Location
611	SAMPLE	ACCT	GENERAL LEDGER	01/01/2000	06/30/2000	12-S-044
1800	SAMPLE	ACCT	GENERAL LEDGER	07/01/2001	12/31/2001	14-A-010
612	SAMPLE	ACCT	GENERAL LEDGER	01/01/2002	06/30/2002	1814-12-5
317	SAMPLE	ACCT	GENERAL LEDGER	07/01/2000	12/31/2000	1903-22-2
480	SAMPLE	ACCT	GENERAL LEDGER	07/01/2002	12/31/2002	1903-22-3
668	SAMPLE	ACCT	GENERAL LEDGER	01/01/2001	06/30/2001	1903-24-4

Fig. 75

Returning to our search for boxes, if your record center uses 6-digit box numbers and you wanted to find all the boxes in the range of 510550 to 510559, you would enter 51055% - using a wildcard, meaning **any digit**, to represent the last digit.

## Searching for Folders

When you use Quick Search to search for folders, you can use the following criteria, individually or in combination:

- Box # (all folders in box)
- Major (description)
- Matter
- Minor (description)

## Searching for Locations

You can use Quick Search to search for a specific location, or a group of locations, such as an aisle. For example, if you wanted to see all the boxes on aisle 14-A, you would simply enter 14-A in the **Location** field.

## Searching for Customers

The **Customer** field is used to search for a customer listing by name. If you don't know the customer code for a particular customer, for example, you would enter all or part of their name here.

You can use the wildcard character to replace any letter or number in your search. The result would look like the illustration at right.

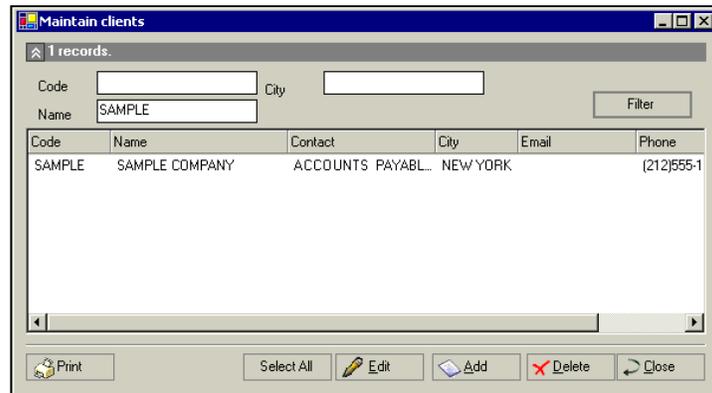


Fig. 76

## Chapter 10 – Audit Trails

An Audit Trail is used to display the history and current status of boxes and folders that are or have been in the record center.

Several audit trails are available to track boxes and folders.

For boxes, these include:

- check in/outs,
- location history, and
- destruction/ permanent out history.

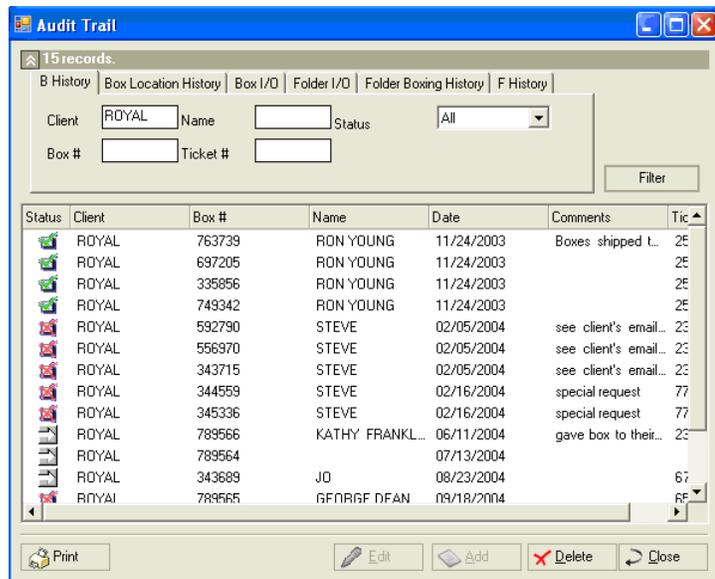
For folders, the audit trails include

- check in/outs,
- box history, and
- destruction/ permanent out history.

To access the Audit Trail Screen (*right*), click the **Audit Trail** icon in the Shortcuts Task Panel, or you can click **Setup>Audit Trail** on the Menu Bar.

The tabs at the top of the screen provide access to each of the audit trail functions.

Fig. 77



### Box History

The Audit Trail Screen opens by default to the **B History** tab. This audit trail tracks boxes that have been destroyed or permanently removed.

Three Audit Trail symbols are employed:

- Gray arrows represent boxes that have been permanently removed.
- Red x's represent boxes that have been destroyed.
- Green check marks represent items recalled.

There are filters for

- Client – the Client Code.
- Name – name of the authorized person from the client.
- Status – Pull down to select All, Perm Out, or Destroyed.
- Box # - the box number.
- Ticket # - the ticket or order number.

## Box Location History

The Box Location History audit trail tracks boxes as they are moved from one location to another within the record center.

There are filters for

- Client
- Box #
- From location code – the original location of the box(es)

## Box In/Out

Box In/Out tracks boxes as they are checked out from and returned to the record center.

There are filters for

- Client
- Box #
- Ticket #
- Out Only (check this box if you want to see only items which are currently checked out)

## Folder In/Out

Folder In/Out tracks boxes as they are checked out from and returned to the record center.

There are filters for

- Client
- Box #
- Ticket #
- Out Only (check this box if you want to see only items which are currently checked out)

## Folder Boxing History

Folder Boxing History tracks folders as they are moved from one box to another within the record center.

There are filters for

- Client
- Box #

Box # - this is the new box the folder has been moved to.

## Folder History

To access this feature, click the **F History** tab. Folder History tracks folders that have been destroyed or are permanently out.

Three Audit Trail symbols are employed:

- Gray arrows represent boxes that have been permanently removed.
- Red x's represent boxes that have been destroyed.
- Green check marks represent items recalled.

There are filters for

- Client – the Client Code.
- Name – name of the authorized person from the client.
- Status – Pull down to select All, Perm Out, or Destroyed.

## User Audit Trail

To access the User Audit Trail list click **Setup > User Trail**. Archive Manager tracks newly added and edited boxes and folders by user. It records the date of the addition or change by User Name.

*Fig. 78*

The screenshot shows a window titled "User trail" with a search interface at the top and a data table below. The search interface includes fields for Username, Box number, and Folder number, along with an Operation date dropdown (set to "No date.") and a checkbox for "Search for folders only". There are "Filter" and "Close" buttons. The data table is titled "User trail for requested filters" and contains the following data:

ClientCode	ItemNumber	TableName	Operation	Field	Value	ChangeTime	UserName
4580	50145	BOXES	EDITED	DESCRIPTION	TRIAL BALANCE	2/25/2009	DAVIDSON, LISA
4580	500147	BOXES	EDITED	DESCRIPTION	TRIAL BQLQNC	2/25/2009	DAVIDSON, LISA
4580	500147	BOXES	EDITED	DESCRIPTION	TRIAL BQLANCE	2/25/2009	DAVIDSON, LISA
4580	500149	BOXES	EDITED	DESCRIPTION	TRIAL BALANCE	2/25/2009	DAVIDSON, LISA
4580	500150	BOXES	EDITED	DESCRIPTION	PAYROLL REGIS	2/25/2009	DAVIDSON, LISA
4580	500151	BOXES	EDITED	DESCRIPTION	PAYROLL REGIS	2/25/2009	DAVIDSON, LISA
4580	500152	BOXES	EDITED	DESCRIPTION	CASH RECEIPTS	2/25/2009	DAVIDSON, LISA
4580	500153	BOXES	EDITED	DESCRIPTION	CASH RECEIPTS	2/25/2009	DAVIDSON, LISA
4580	500157	BOXES	EDITED	DESCRIPTION	CASH RECEIPTS	2/25/2009	DAVIDSON, LISA
4580	500158	BOXES	EDITED	DESCRIPTION	CASH RECEIPTS	2/25/2009	DAVIDSON, LISA
4580	500158	BOXES	EDITED	DESCRIPTION	CASH RECEIPTS	2/25/2009	DAVIDSON, LISA
ROYAL	543207	BOXES	NEW	BOXNUMBER	543207	2/25/2009	MENDES, NIVIA
ROYAL	543208	BOXES	NEW	BOXNUMBER	543208	2/25/2009	MENDES, NIVIA
ROYAL	543209	BOXES	NEW	BOXNUMBER	543209	2/25/2009	MENDES, NIVIA
ROYAL	543210	BOXES	NEW	BOXNUMBER	543210	2/25/2009	MENDES, NIVIA
ROYAL	543212	BOXES	NEW	BOXNUMBER	543212	2/25/2009	MENDES, NIVIA
ROYAL	543207	BOXES	EDITED	DESCRIPTION	PAYROLL	2/25/2009	JESLEYANTHON
ROYAL	543208	BOXES	EDITED	DESCRIPTION	CASH DISBURSE	2/25/2009	JESLEYANTHON
ROYAL	543209	BOXES	EDITED	DESCRIPTION	ACCOUNTS PAY	2/25/2009	JESLEYANTHON
ROYAL	543210	BOXES	EDITED	DESCRIPTION	ACCOUNTS REC	2/25/2009	JESLEYANTHON

**Filters** - Several filters are available and may be used in combination.

**Username** – User's last name

**Box number** – box number

**Folder number** – folder number

**Operation date** – click Select to bring up the calendar to select desired date(s)

**Search folders only** – click to limit your results to solely folders

There is also a User Audit Report in the Base group of reports. There are filters for:

Box number

Folder number

Operation date

User

## Chapter 11 – Billing

### The Charges Screen

The Charges screen (*below*) displays the history and status of your entire client billing. Like all Archive Manager screens, it may be sorted on any column by clicking the column heading.

To access this screen, click the **Billing** icon in the Shortcuts Task Panel, or click **Billing** on the Menu Bar.

QB	Client code	Department	Date	Ticket	BillingCode	Description	Quantity	Units	BillingRate	Amount	SalesTax	Total
	8003		10/24/2005	00000190	S	SEARCH	1	EACH	\$3.5000	\$3.5000	\$0.0000	\$3.5000
	8003		10/24/2005	00000192	R	REFILE	1	EACH	\$2.5000	\$2.5000	\$0.0000	\$2.5000
	8003		11/10/2005	00000245	S	SEARCH	1	EACH	\$3.5000	\$3.5000	\$0.0000	\$3.5000
	8003		11/10/2005	00000250	S	SEARCH	1	EACH	\$3.5000	\$3.5000	\$0.0000	\$3.5000
	8003		10/01/2006	00000335	S	SEARCH	1	EACH	\$3.5000	\$3.5000	\$0.0000	\$3.5000
	8003		04/23/2012	00000609	R	REFILE	1	EACH	\$2.5000	\$2.5000	\$0.0000	\$2.5000
	8003		04/23/2012	00000609	PU	PICK UP	1	EACH	\$2.5000	\$2.5000	\$0.0000	\$2.5000
	8003		08/06/2014	00000705	R	REFILE	1	EACH	\$2.5000	\$2.5000	\$0.0000	\$2.5000
	8003		08/06/2014	00000705	PU	PICK UP	1	EACH	\$2.5000	\$2.5000	\$0.0000	\$2.5000

Fig. 79

#### CHARGES SCREEN LEGEND

- **Green dot** – Current charge, not yet processed
- **Blue dot** – Daily charge, not yet processed
- **Red dot** – Processed charge

### Entering charges

New charges are always entered from the New Charge Screen (*Figure 56, next page*), which you can access in several different ways:

- from the Charge Screen, by clicking the Add button;
- from the Current Client screen by clicking on the **Fixed or Current Charge** button, or
- as you perform operations such as check/in out, destruction process, permanent out, etc. by checking the Insert Charges box.

The New Charge Screen permits you to itemize every billing item, so that you can show the complete break down of all fees, services, and other billables via a single Charge Ticket.

## Charge Types

There are two types of Charges:

- **Current Month Charges** – These include services rendered during the current month, such as Deliveries, Pick Ups, ReFiles, etc. Such items must be entered individually to appear in monthly billing.
- **Fixed Charges** – These represent ongoing or recurring billing items that change infrequently, such as rental for a shelf or room, for storing an entire file cabinet, etc. Because these charges are recurring, you can enter the information only once, and Archive Manager will then include them in each billing cycle. Fixed charges are entered in the client edit screen (chapter3).

The screenshot shows a 'New Charge' dialog box with the following fields and values:

Charge Type	Current	Ticket Number	075438
Client(*)	SAMPLE	Ticket Date	12/25/2003
Department	TRADING		
Billing Code(*)	5		
Description	SEARCH		
Billing Rate(*)	3.5000	Quantity	0
Tax Rate(*)	0	Amount	0
Taxable	<input checked="" type="checkbox"/>	SalesTax	0
		Total	0

Fig. 80

## Entering Data

The New Charge Screen contains the following fields (fields with asterisks are mandatory):

- **Charge Type** – Pull down the menu to select either Current or Fixed.
- **Client** (mandatory) – Enter the Client Code manually, or click the ellipse to select the code from the Maintain Clients Screen. Archive Manager validates the entered code against the Maintain Clients table and inserts the corresponding name in the field to the right. If the computer is unable to find the client, an “Invalid Client Code” message is displayed.
- **Department** – This field is used for clients who prefer to be billed by department. Enter the Department Code manually, or click the ellipse to select the code from the Client Departments screen. Archive Manager validates the entered code against the Client Departments table and inserts the corresponding department name in the field to the right. If the computer is unable to find the department, an “Invalid Department Code” message is displayed.
- **Billing Code** (mandatory) – You can either enter the code manually, or you can click the ellipse to bring up the Billing Codes List screen. You can use the filters, if necessary, to select the desired billing code. Archive Manager validates the entered code against the Billing Codes List table and inserts the corresponding Billing Code description in the field to the right. If you enter a Billing Code that is not in the list, you will be prompted “Insert a Manual Charge?”. This permits you to enter a One Time charge that will appear on the Invoice without having set up any Billing Code. When you insert a Manual Charge, you must also enter a description.

- **Ticket Number** – This item is sometimes referred to as a **Work Order**. It is a tracking number provided by you, and used by Archive Manager to track this particular service transaction. The number could typically be copied from your order entry form, or from the customer’s service request when the customer is using a pre-numbered order form to request services.
- **Ticket Date** – This is the date on which a service is actually performed. If you are entering charges daily, it would likely be today’s date. If you are entering charge tickets weekly or monthly, then you would want to enter the charge ticket dates.
- **Billing rate** (mandatory) – The correct billing rate is automatically inserted in this field when a billing code is entered. For manual charges, you must enter the rate yourself.
- **Tax rate** – For customers subject to sales tax, the tax rate appears automatically. This is copied from data recorded by Archive Manager from the Customer Contract Screen (Fig. 23). The tax rate used may be changed for a particular charge.
- **Taxable** – For items that are set up as **taxable** in the Maintain Billing Codes Screen (Fig. 14), this box is checked automatically. It may selected or unselected here for this particular charge
- **Quantity** – Enter here the number of items associated with this charge.
- **Amount** – Sub-total of the charge, calculated automatically.
- **Sales Tax** – Applied to taxable items only, calculated automatically
- **Total** – Total amount of this charge, calculated automatically

#### FILTERING

The Charges Screen may be filtered using any of the following filters, individually or in combination:

- **Client** – The Client Code. Click the Exact match box to match the client code exactly.
- **Description** – The description of the charge
- **Status** –
  - ❖ UnProcessed – all unprocessed charges
  - ❖ UnClosed – all charges that have not been closed to a month.
  - ❖ All – all charges in the file
- **Billing Code** - The billing code
- **Ticket #** - The ticket or order number
- **Date filters** – (second tab) The ticket dates
- **Type** –
  - ❖ All – Both daily and current charges.
  - ❖ Daily - Only daily charges.
  - ❖ Current – Only current charges.

## Chapter 12 – The Maintain Orders Module

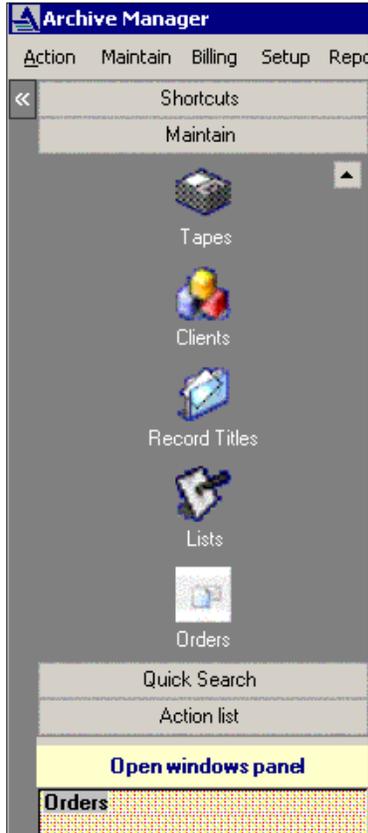
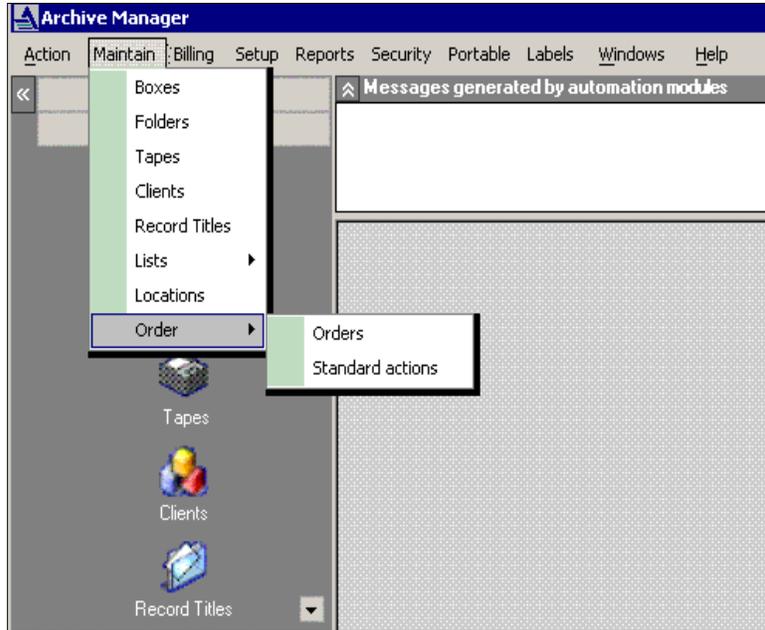
### The Orders Screen

The **Orders** screen displays a queue of item orders that your record center has received either from the Web Access system, or from orders that you have created. Orders from Web Access are indicated by a Ticket Number format of "WEB-####".

**NOTE:** "Order Number" and "Ticket Number" are identical and are used interchangeably.

Fig. 81

To enter the Orders screen, you can either click **Maintain > Order>Orders** on the Menu Bar (right);



– or you can use the **Orders** button from the Maintain panel (left).

Fig. 82

The **Orders** screen appears, displaying the following columns, from left to right:

- Order date
- Ticket number
- Client code
- Department number (if applicable)
- Requester
- Address
- Processed
- Web order

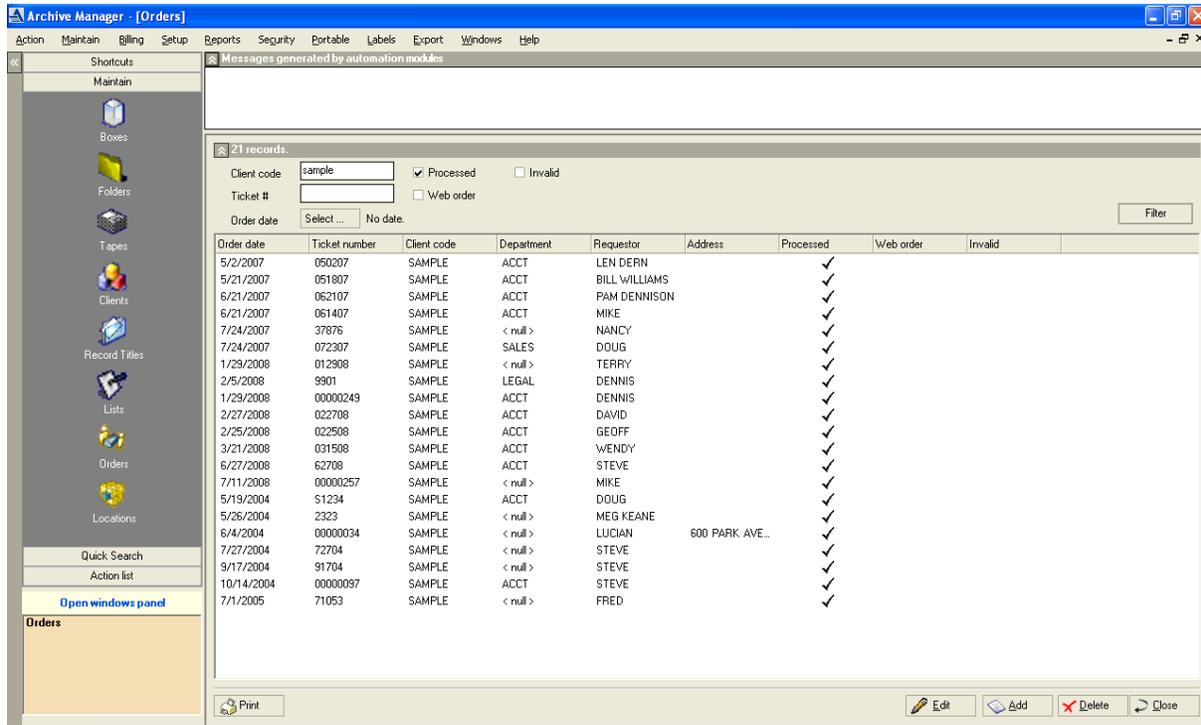


Fig. 83

The screen includes a window that displays the Web Access system message, advising you that an order has been received. It also includes the familiar Filter facility. The list can be filtered by:

- Client code
- Ticket number
- Processed – check this box to select processed orders
- Invalid - check this box to select invalid orders
- Web Order - check this box to select Web orders
- Order date – brings up calendar to select order dates

Orders may be sorted in the same manner as the other Maintain screen lists.

Returning to the Order command on the Menu Bar, select the **Standard Items** option to view the Standard Actions screen. Unlike most commands, Standard Items is available only on the Menu Bar, since it is typically used only once for a setup operation.

## Standard Actions

The Standard Actions screen (*right*) displays the list of billable actions available in Archive Manager; i.e., check in, check out, destroy, etc.

A billing code can be associated with each action so that clients are automatically billed a predetermined fee for any action performed (*autobilling*).

To set up this function, simply edit the desired action, applying an appropriate billing code from your Master Billing Code list.

To edit an action item In the Standard Actions screen, double-click the item; an edit screen opens where you can enter the required billing code (*below*).

Standard action	
Standard actions	
Action name	Box check-out
Billing code	5
Billing code	5

Fig. 85

Standard actions
Box destroyed
Move boxNULL
Box check-out
Folder check-out
Folder move
Folder destroyed
Folder check-in
Box check-in
Box permanent out
Folder permanent out
Destroy tape
Tape out
Move tape to location
Move tape to box
Folder move to location
Tape perm out
Tape in

Fig. 84

## Creating a Blank Work Order

When a new work order is created, it starts out blank or empty, and information is then added to it.

To create a blank work order, click the **Add** button at the bottom of the Orders screen (Fig. , above).

The **New Order** screen appears, where you will be asked to identify the client and the department, and to enter the requestor of the order, phone number, etc. (similar to the screen that pops-up at checking out items).

Fig. 86

To populate the Client field at the New Order screen, click the ellipsis (three dots) to the right of the Client field to open the Maintain Clients screen (right).

Highlight the desired client, and then click the **Select** button at the lower right of the screen.

Or if you know the client code, just type it in.

Code	Name	Billing contact	City	Email	Phone	Industry
600	MOSLER SLAGER		NEW YORK	HGREEN@MSL...	(212) - 568 ...	2800
6360	LION BROKERAGE	KIM DALTON	NEW YORK	KDALTON@LIO...	(212) - 456 ...	4200
SAMPLE	SAMPLE COMPANY	ACCOUNTS PAYABL...	NEW YORK		(212) - 562 ...	9999
LEVEN	LEVEN & TAYLOR	MIKE EWING	PETERSVI...	MEWING@LTL...	(815) - 566 ...	2800
ROYAL	ROYAL SALES CORP		YONKERS		(914)234-5999	9999
5120	LOWELL REILLY & MCG...	KIM YOUNG	NEW YORK	KYOUNG@LRM...	(212) - 545 ...	9999
5140	KEEVER INSURANCE	DOUG KEVER	NEW YORK	DKEEVER@AD...	(212) - 879 ...	9999
770	TECH-COMM.BIZ		ROCKAW...	PLEVIN@TECH...	(973) - 625 ...	2200
4580	HARRISON INSURANCE		NEW YORK	FCLEMENT@HI...	(212) - 456 ...	9999

Fig. 87

You are returned to the New Order screen, where the selected client now populates the Client field. Follow the same procedure to populate the Department field, then enter the remaining data.

When you are finished entering information, you may then add instructions or comments of any length for the delivery ticket; for example, special instructions to the driver.

When you have completed the New Order screen, click the **Save** button.

Fig. 88

Finally, click the **Save** button on the New Order screen. You are returned to the Maintain Orders screen, where the new blank order appears. The new order now includes a Ticket Number, which is supplied automatically by Archive Manager. If you reopen the **Add Orders** screen for this order, the new Ticket Number will appear in the Ticket Number box.

**NOTE:** Write down the Ticket Number for the new order - you'll need it shortly.

## Adding Items to the Work Order

Note that we have not added any items to our blank order yet. We are about to do that now.

We will now add a “checkout box” item to the order we just created, as follows:

1. Go to the Maintain Boxes screen.
2. If the Client Number is for example 600, filtering on 600 will display all the boxes for Client No. 600.
3. Click to select the row with the desired box, and then right-click to view the action menu.

Location	Box number	Client	Description	FromDate
14-A-065	5012		TRIAL BALANCE LEDG...	01/01/2001
14-A-005	41808		TRIAL BALANCE	01/01/2002
14-A-005	41808		E	01/01/2003
3-B-050	41812		AL CASE	01/01/2002
14-A-009	401104	600	Destroy	05/25/2004
5-C-035	401107	600	Perm out	01/01/2003
14-A-019	401108	600		01/01/2003
3-B-053	401109	600		05/28/2004
3-B-047	150001	600		06/23/2004
3-B-047	150002	600		06/23/2004
3-B-046	621520	600	ACCOUNTS PAYABLE	01/01/2001
3-B-045	621521	600	ACCUNTS RECEIVABL...	01/01/2002

Fig. 89

- From the action menu, select **Add to Order**, and then **Check Out**.

The Select Order screen appears (*below*).

**Note** – you can create a brand new order within the boxes, folders, or tapes lists by clicking **New Order**.

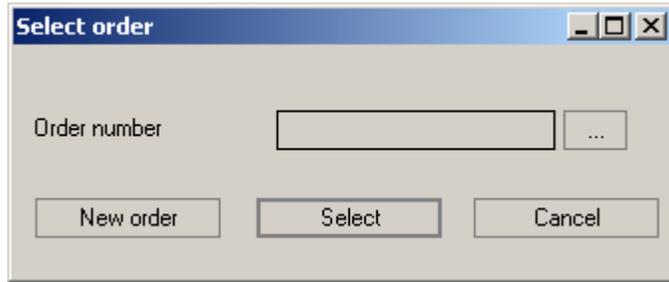


Fig. 90

- Click the ellipsis to the right of the Order number box to display a list of existing orders in Archive Manager.

- Filter on Client Number 600 (from our example, above) to see existing orders for just this client.

- Highlight the order corresponding to the ticket number you recorded after you clicked the **Save** button, above.

- Finally, click the **Select** button.

The box has now been added to the previously blank order.

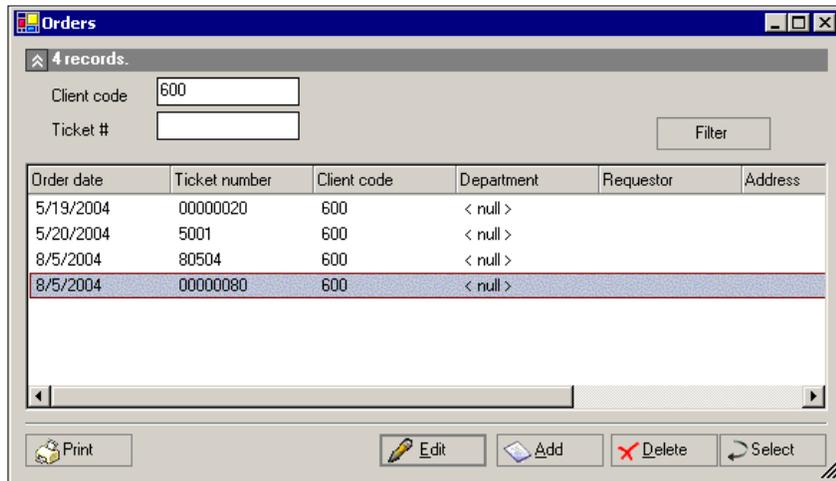


Fig. 91

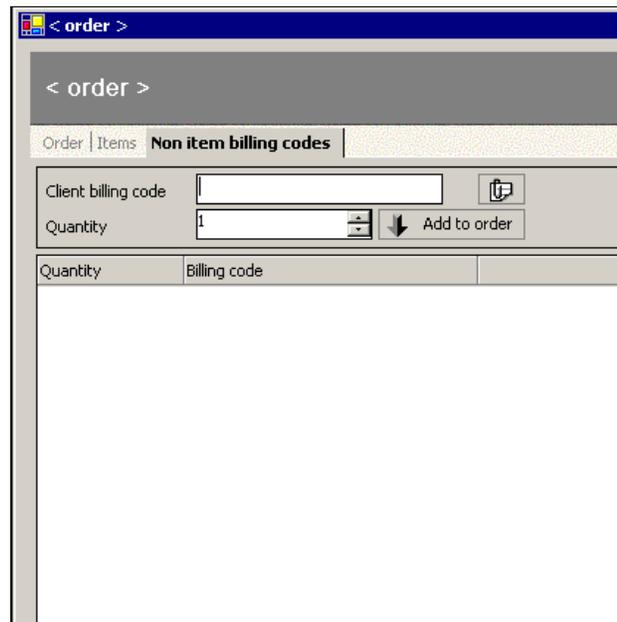
## Adding Non-Item Billing Codes to an Order

“Non-item” billing codes are used for supplies (such as labels), or services (such as a general pickup) that are not typical service items.

To add non-item transactions from the Maintain Orders screen:

- Filter on the client number again, highlight the desired order, and either double-click the row, or click the **Edit** button. The Order screen appears again.

Fig. 92



2. This time, click the tab for **Non item billing codes**.
3. Click the ellipsis to select a Client billing code from the Maintain Billing Codes screen.  
Highlight the desired row and click the **Select** button to return to the Order screen.

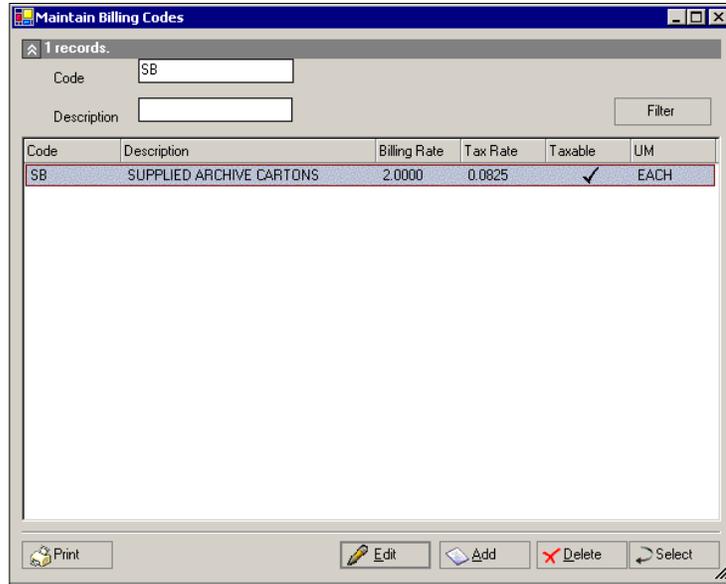


Fig. 93

4. Enter the quantity and click the **Add to order** button. The new order appears in a row on the screen.

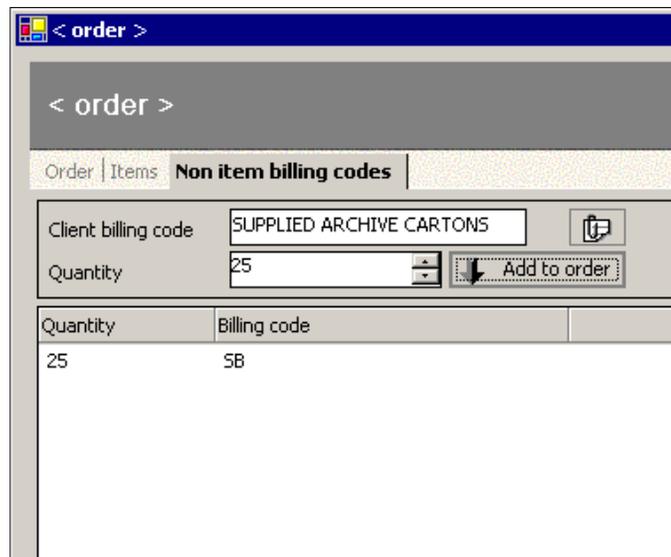


Fig. 94

5. Now click the **Items** tab to see the new items in your order.

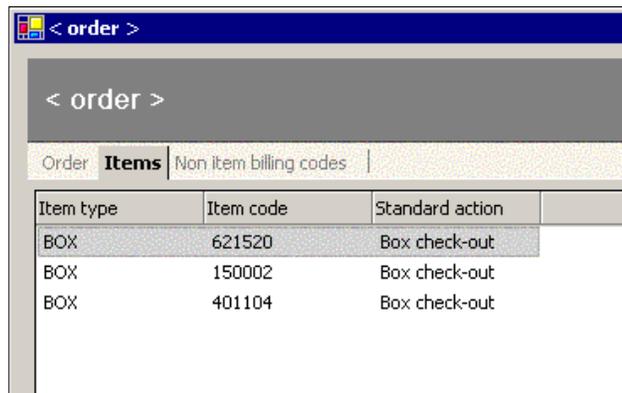


Fig. 95

- Next, click the Order tab to return to the Add Order screen, and click the **Process** button to finalize the order. A prompt notifies you that from this point, you **cannot** modify the order. Click OK to proceed.

 **NOTE:** *The order cannot be modified after this point.*

After you click the Process button, you will see another confirmation prompt: **The order has been processed.**

- A subsequent prompt asks: Do you want to auto-bill the order items?

If you click **Yes**, a charge is automatically generated in the Maintain Billing table.

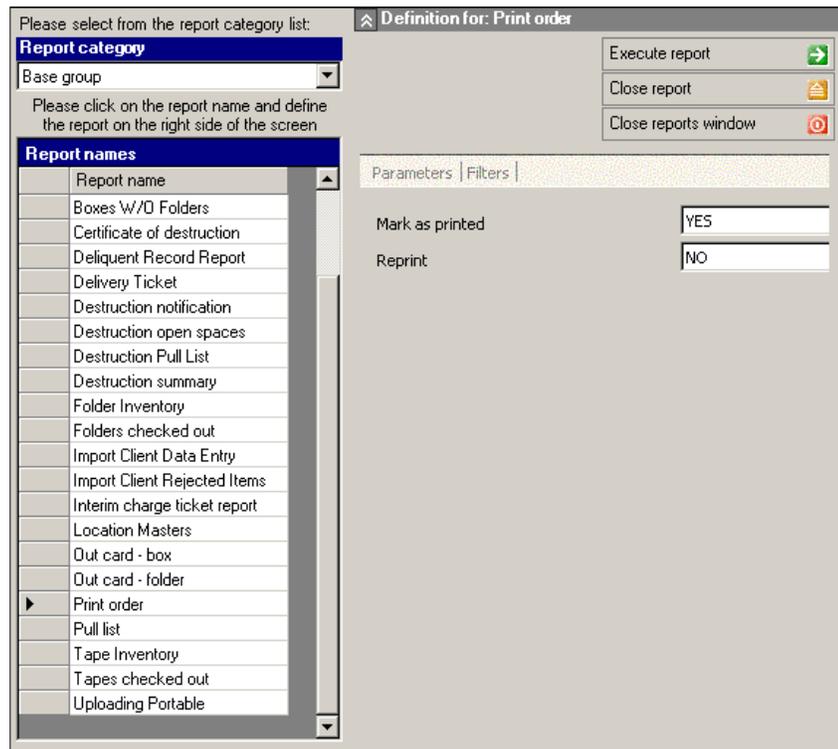
Fig. 96



- Finally, go to the Report Module and print the delivery ticket (see *Delivery Ticket Reports* in Chapter 14).

To locate and print the single order you just created, just filter on the order number. A more practical procedure would be to select **Mark as Printed** to print all new orders that have not previously been printed.

Fig. 97



## Chapter 13 – Month End & Using QuickBooks

### Setting Up QuickBooks

First, set up QuickBooks according to the instructions provided in its manual. After you have completed the installation, follow the steps outlined below to create a link between Archive Manager and QuickBooks. All the steps employ QuickBooks menus.

Before we begin, if you are using a multi-user version of QuickBooks you need to switch to **single user mode** to access the menus we need. Click **File > Switch to Single User Mode**; the prompt advises you that you have changed modes.



Fig. 98

#### ESTABLISH AN INCOME ACCOUNT

To open the Chart of Accounts, either click the **Accnt** icon in the Icon Bar, or click **Lists > Chart of Accounts** on the Menu Bar. Then, right-click anywhere in the ledger and select **New** from the action list to access the New Account screen (*right*).

1. In the **Type** scrollbox, select **Income**.
2. In the **Name** field, enter the same name you entered in the Company Setup screen

(Chapter 2, Fig. 8). The name used in the illustration is **RMS ARCHIVES**

3. When you have completed this form, click **OK**.

A screenshot of the 'New Account' dialog box in QuickBooks. The window title is 'New Account'. The 'Type' dropdown menu is set to 'Income'. The 'Name' field contains 'RMS ARCHIVES'. There is a checkbox for 'Subaccount of' followed by a dropdown menu. The 'Description' and 'Note' fields are empty. On the right side, there are three buttons: 'OK', 'Cancel', and 'Next'. Below these buttons is a checkbox labeled 'Account is inactive' which is currently unchecked.

Fig. 99

#### TELL QUICKBOOKS THAT YOU CHARGE TAXES

In QuickBooks, click **Edit > Preferences** on the Menu Bar to display the Preferences window.

1. Click the **Sales Tax** icon from the topic list in the left panel.
2. Click the **Company Preferences** tab.
3. Under **Do You Charge Sales Tax?**, select **Yes**.

## CREATE A TAX AGENCY

Next, click **Vendor>Vendor List**, and in the New Vendor screen, enter the agency that collects your sales tax in the QuickBooks Vendor List as though it were a vendor; i.e., New York State - Sales Tax.

The name must be **identical** to the name entered in Archive Manager's Company Setup screen (*Chapter 2, Fig. 8*).

Also enter your current outstanding Sales Tax balance for this quarter.

Your screen should look like *Figure 76* at right.

On the **Additional Info** tab, enter your TIN (Tax ID Number) for this authority, and in the **Type** scrollbox, select **Tax agency**.

When you are finished, click **OK** to save your entry.

The screenshot shows the 'New Vendor' dialog box with the following details:

- Vendor Name:** New York State - Sales Tax
- Opening Balance:** 954.00 as of 12/28/2003
- Address Info Tab:**
  - Company Name:** New York State - Sales Tax
  - Address:** NY Dept of Taxation, Sales Tax Division, PO Box 1500, Albany NY 10700
  - Print on Check as:** New York State - Sales Tax
- Buttons:** OK, Cancel, Next, Help
- Other:** Vendor is inactive checkbox (unchecked)

Fig. 100

If you are using a multi-user version of QuickBooks, you were instructed to switch to *single user mode* before we set up the Income and Vendor accounts. Now you should return QuickBooks to *multi user mode* following the procedure outlined above.

## LOCATE YOUR QUICKBOOKS FILE

Archive Manager needs to know where to find the data file in which QuickBooks stores your accounting information. This requirement was mentioned in Chapter 2 when we discussed the various fields in the Company Setup screen (*Chapter 2, Fig. 8*). Go to that screen now and check to see if you completed this field correctly, and that it contains the file's full (absolute, rather than relative) pathname.

If the field is not correctly filled, click the ellipse to the right of the field to navigate to file's location. Its extension is \*.QBW, and it is usually found in:

C:\ProgramFiles\Intuit\QuickBooks\[QuickBooks account name].QBW.

## Daily invoicing

Daily charges appear in the Charges screen with a blue dot. Daily charges may be used for special one time projects or large pick ups and deliveries.

To export a daily invoice to QuickBooks, go to Export > Accounts.

## Month End Process

The month end process is one of Archive Manager's most important accounting functions. In this procedure, Archive Manager exports all unprocessed current charges to QuickBooks, which creates invoices for each of your customers.

It is prudent to take certain precautions before actually doing a month end close, to ensure data integrity and accuracy. These include:

- Run an Interim Charge Ticket report (see *Chapter 14 – Reports*) for all clients prior to proceeding to ensure that all charges have been entered properly.
- Check to see that all clients have been exported to QuickBooks, or have been entered manually, exactly as they appear in Archive Manager, including the *Bill To* address.
- Check to see that all new boxes have been scanned into proper locations. It is advisable to run an Interim Storage report.
- Check to see that the income account has been correctly set up in QuickBooks.
- Check Archive Manager's *Company Setup* screen (*Page 6, Fig. 8*) to see that Archive Manager has correct information including the tax agency, tax on storage option, and whether to include service and storage charges on one invoice.
- Do a back up of your data.

When you have completed these steps and are ready to proceed with the month end process, proceed as follows:

### PROCEDURE FOR MONTH END

1. On the Main Menu bar, click Billing and scroll down to End Month.

The popup at right appears:

*Fig. 101*

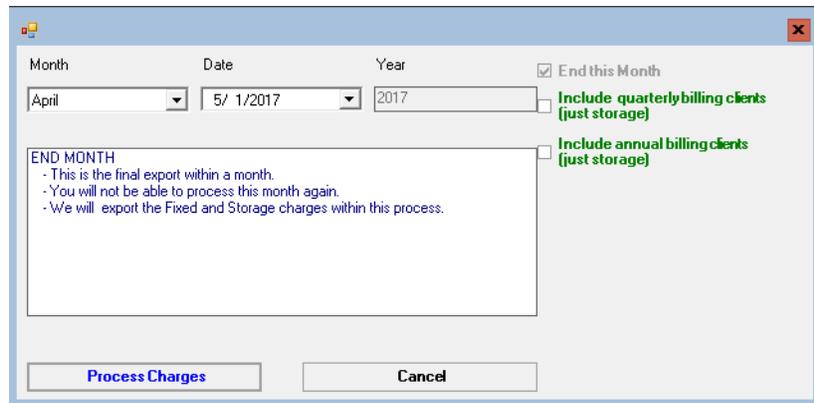


2. Respond Yes to continue.

The *End Month* screen appears (right).

3. In the *Month* field, select the month you are closing.

*Fig. 102*



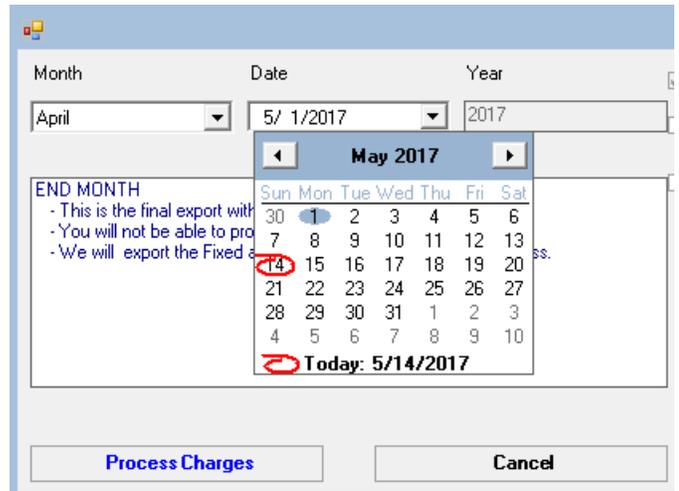
In the illustration above, the month ending is January. In the Date field, by default, the first day of the following month will appear.

- Click the carat in the Date field, and use the calendar tool (*right*) to select either the last day of the month you are closing, or the first day of the next month.

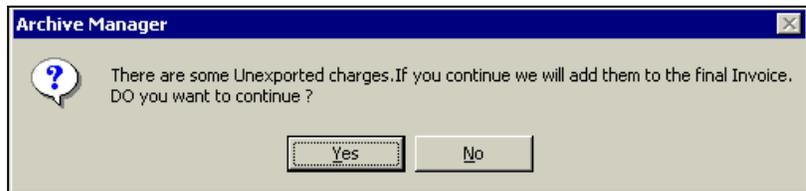
Fig. 103

- From the End Month screen, (*Fig. 98, above*) select the checkboxes to choose whether to include quarterly or annual storage charges.
- Click Process Charges.
  - If charges were entered in Archive Manager during the month that have not yet been exported, a prompt appears (*right*) to tell you “*There are some unexported charges.*”

Fig. 104



This is to remind you that these charges will be safely exported along with your other billing.



- If Process Charges was already executed this month, an error message appears, saying “*Error: This month is closed.*” (*right*).

Fig. 105



Finally, when the process has been completed successfully, you will receive a prompt saying “*The Month End process was successful.*”

Your invoices have been generated. You can now choose whether to print them in QuickBooks or in Archive Manager.

## Printing Invoices in Archive Manager

To print your invoices in Archive Manager:

- Click *Reports* on the Main Menu bar.
- In Report Category, select *Charges (Invoices)*.
- In Report Names, select *End Month Invoice*.

The *End Month* report screen appears as below.

Fig. 106

4. In the Parameters fields, enter (numerically) the month and year you are closing. In our example, above you would enter **10** for October and **2017** for the year.
5. Enter the 4 digit year in the format shown above.
6. Respond YES to *End Month*, and leave Mark as Invoiced as NO.
7. Select ALL to print all invoices, PDF for those clients to have PDF invoices generated and emailed, or Print for just those clients who receive a printed invoice.

Click the **Execute Report** button .

The Invoice is displayed in Preview Mode, as illustrated below. If you have selected PDF invoices, you will first get a pop up of the number of successfully emailed invoices and screen print will only be those invoices.

Quantity	Description	Rate	Amount	Tax
1.00	04/30/2017 Minimum Storage Fee.	45.00	45.00	N on 0.00
<b>Total:</b>			<b>45.00</b>	
1.00	F7655 : 06/01/2016 FURNITURE STORAGE	25.00	25.00	Tax 2.06
1.00	00000426 : 03/11/2017 PICKED UP 1 BOX	18.30	18.30	N on 0.00
3.00	00000426 : 03/11/2017 REFILE	2.50	7.50	N on 0.00
1.00	WEB00000028 : 03/14/2017 SEARCH	3.50	3.50	N on 0.00
1.00	00000424 : 03/16/2017 SEARCH	3.50	3.50	N on 0.00
1.00	WEB00000028 : 04/06/2017 SEARCH	3.50	3.50	N on 0.00
<b>Total:</b>			<b>63.80</b>	
Tax: AM - 8.25 (6.825) 2.06				
<b>Total:</b>			<b>108.56</b>	

Fig. 107

## DEPARTMENTAL INVOICES

To print Departmental Invoices, follow the procedure outlined above, but select *Departmental Invoices* at the Report Name field above. If you have entered a different address for the department, that address will be printed.



**NOTE:** If you make a mistake, you can roll back the month by using the *Rollback End Month* option in the *Accounts Export* feature, described below.

## Exporting Invoices to QuickBooks (and Other Accounting Packages)

To export invoices for use in QuickBooks and other accounting packages:

1. On the Main Menu bar, click *Export > Accounts export*.  
The *Accounting System Export* screen appears, below.

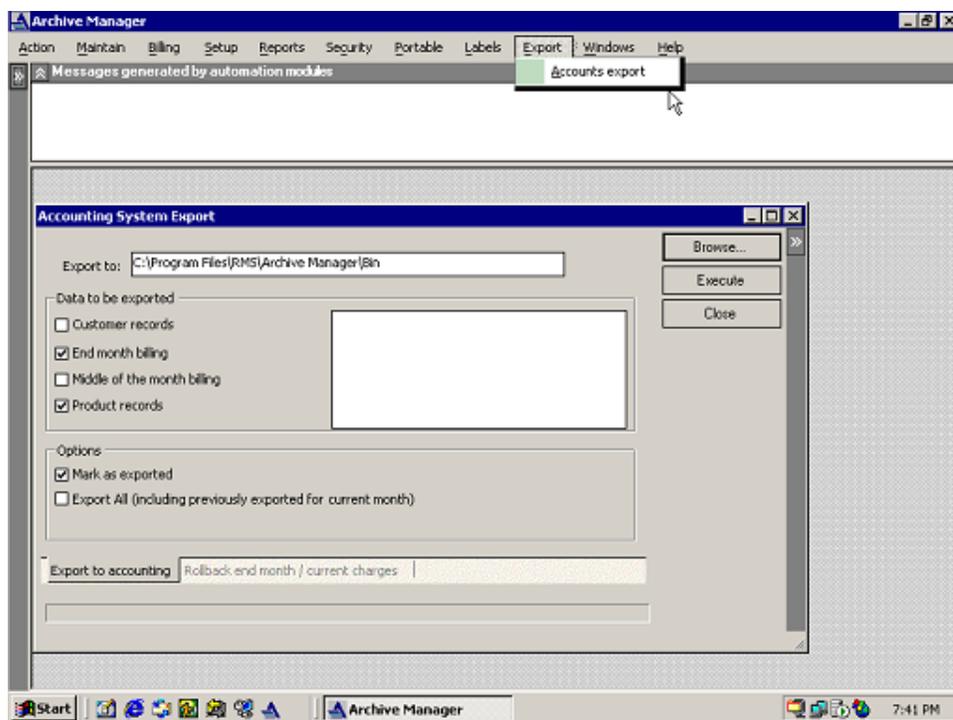


Fig. 108

2. Under *Data to be exported*, select the invoice items you wish to export. The choices are:
  - Customer records
  - End of month billing
  - Middle of month billing
  - Product records (billing codes)
3. Under *Options*, select one or both choices:
  - Mark as exported, and/or
  - Export All (including previously exported for current month)



**NOTE:** Select "Mark as exported" only when you are ready to close the month.

4. Finally, click **Execute** to export to accounting

This will place three files on your PC in C:\Program Files\RMS\Archive Manager\Bin:

- *Customer Records.iif*
- *Product Records.iif*
- *Current Product Transaction Records.iif*

#### ROLLBACK END MONTH

As mentioned above, if you make a mistake and need to undo your End Month process, you can return to your pre-End Month status by using the Rollback screen, as follows:

1. Click the gray area at the bottom of the screen labeled Rollback end month/current charges.

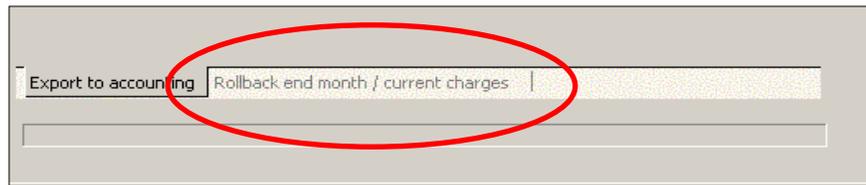


Fig. 109

The Rollback screen appears, offering you the following two options:

- Rollback Current Charges, or
- End of Month charges.

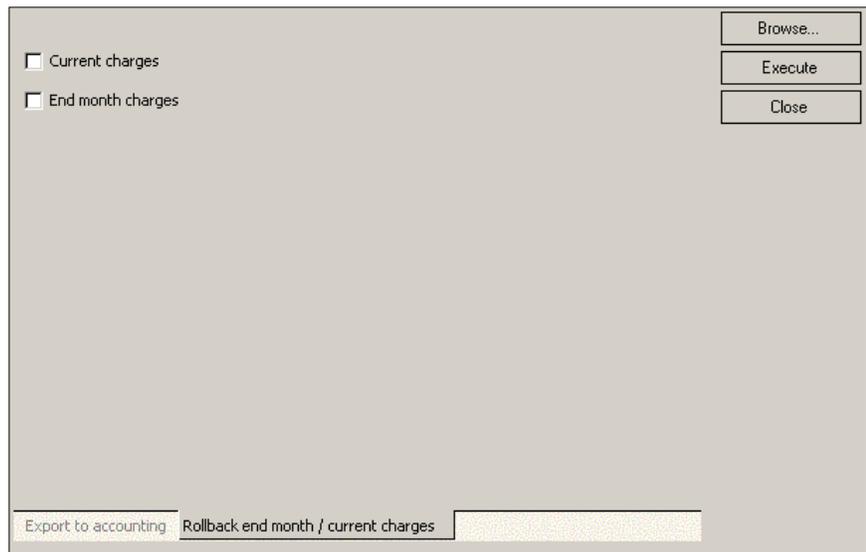


Fig. 110

2. Make your selection.

3. Click the **Execute** button.

If the files have not been exported already, the monthly charges are reinstated as unprocessed.

You may now add or edit charges and close the month again.



**NOTE:** Once the export process has already taken place, you **cannot** roll back.

## Importing Invoices into QuickBooks

To import invoices into QuickBooks:

1. Start QuickBooks
2. Change QuickBooks to *Single User* mode.
3. At the Main Menu bar, click choose *File > Utilities > Import > Import IIF files*.
4. Import the files in the following order:
  - a. *Customer Records.iif*
  - b. *Product Records.iif*
  - c. *Current Product Transaction Records.iif*

You are now ready to go to QuickBooks to print your invoices.

## Printing Invoices in QuickBooks

To print invoices in QuickBooks:

1. Start QuickBooks.
2. Select *Customer > Customer Navigator* from the QuickBooks Main Menu bar.
3. Under *Related Activities*, click *Print Invoices*.

Your invoices are automatically created and will now appear in QuickBooks.

They may be reprinted at any time.

You now have at your disposal QuickBooks' first class receivable tracking system, its convenient accounting features, and a wide variety of QuickBooks reports

## Chapter 14 – Reports

To open the Reports module, click Reports from Shortcuts on the left task pane. Or, from the task bar menu, click **Reports > Reports**.

### General conventions

#### SELECTING REPORTS

From the pull down menu, select the group of report from which you will select; either

- Base group – information about box and folder storage
- Charges (invoices) – discussed in Chapter 13: Month End
- Client information – client activity statistical reports
- General – Information about code table contents.
- Tapes – information about tape storage

#### FILTERS

Filters allow you to set parameters for which customer, departments, locations, etc. will be included in a report. With the Filter pane, on the right, you can use Boolean logic to build hierarchical queries to obtain the information you want. Simply follow the prompts to build the query or filter you want. Note like looking up information on the maintain lists, the wildcard character is % for the filter operator Contains.

- **Adding filters** – After entering each filter selection, click the Add filter button. The filters you enter are displayed in the filter dialogue box at the bottom of the screen. The report will be sorted in the order in which the filters appear.
- **Deleting filters** – To delete a filter, first click on its line in the filter dialogue box, then use the Delete filter button to remove it. You may also delete filters using the Load Saved Filter window, discussed below.
- **Save filter setting** – After you have set filters for a report, you can press the Save Filter button to save those settings to a file. When a report is successfully saved, a prompt appears saying, “Filter has been saved.”

This is a very useful tool for reports such as box and folder inventory reports. With saved filters, you need to generate the filters only once, and you can then save the report settings for future uses.

- **Load saved filter** – Pressing the Load Saved Filter button brings up your list of filters. To choose one of the displayed filters, highlight the filter and click the **Select Filter** button. To delete one, click the **Delete** button, instead.
- **Setting order** – In most reports, you can choose how you want the data ordered by clicking on the column heading.
- **Choosing visible columns** – In most reports, you can choose what columns to include or omit by clicking on the Visible Columns headings.
- **Execute report** – Once the filters, sort order, and columns have been selected, press the Execute button report to run the report. All reports automatically preview to the screen and from there you can utilize the navigation icons to proceed.

## Base Group

### AUDIT REPORT

The Audit Report (*below*) is an extremely effective report that allows you to audit the Archive Manager system by

- **Location range**
- **Space number**
- **Customer**
- **Department, or**
- **Description**

The illustration at right shows how the Audit Report setup screen would be configured to audit the system by Location Range. Using this filter, the report will show you what Archive Manager thinks is in each location, with provisions to verify the presence or absence of each box.

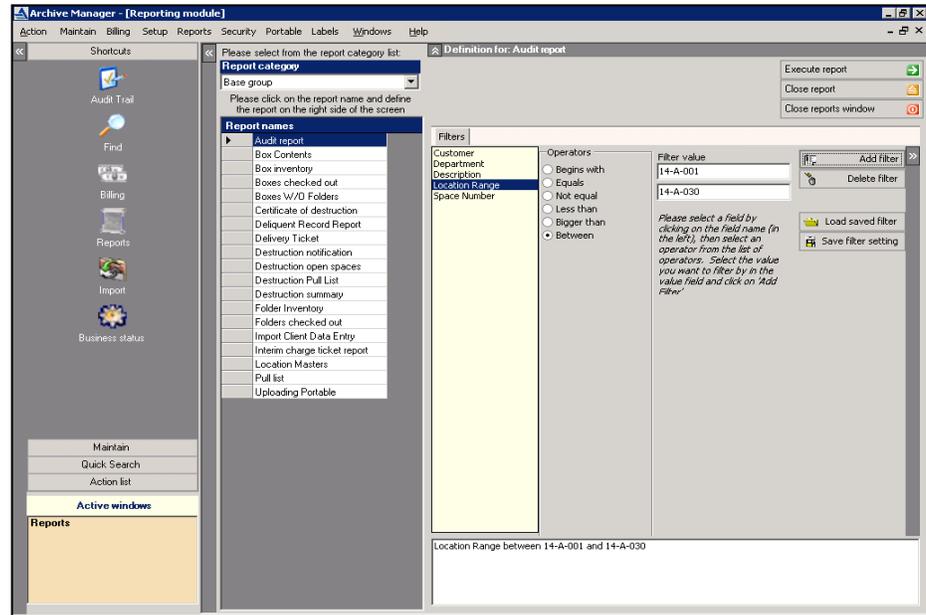


Fig.111

When the Audit Report setup screen is completed and the filters are saved (if desired), click the Execute Report button to display the Report screen, illustrated at right (*Figure 81*).

Since the report is by location, the group tree in the left pane will navigate from one location to the next.

If a different filter is selected – the Customer filter, for example – the tree icons would navigate customers instead of locations.

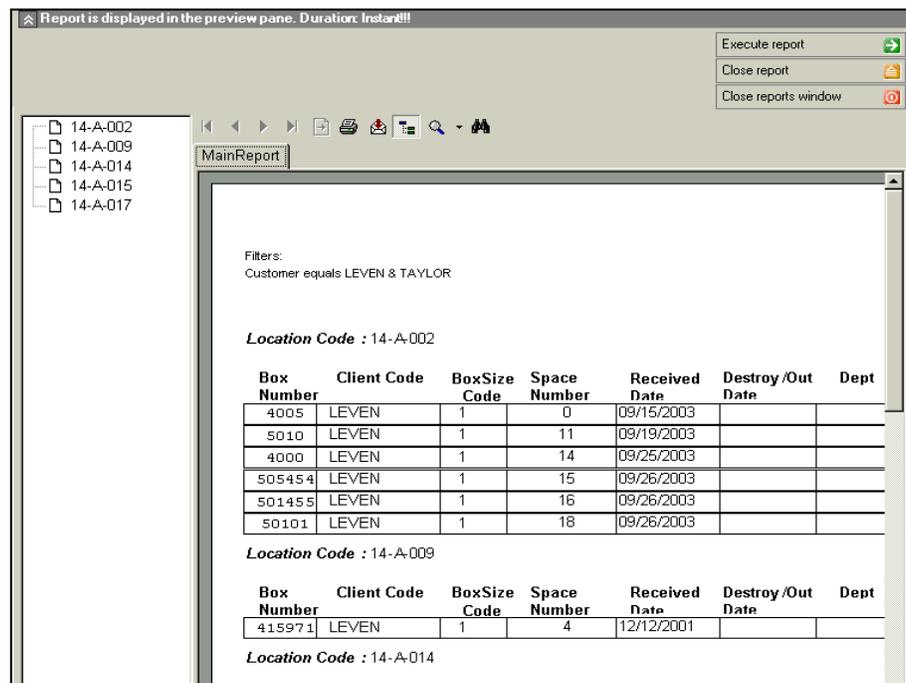


Fig. 112

## Navigation buttons for navigating displayed reports



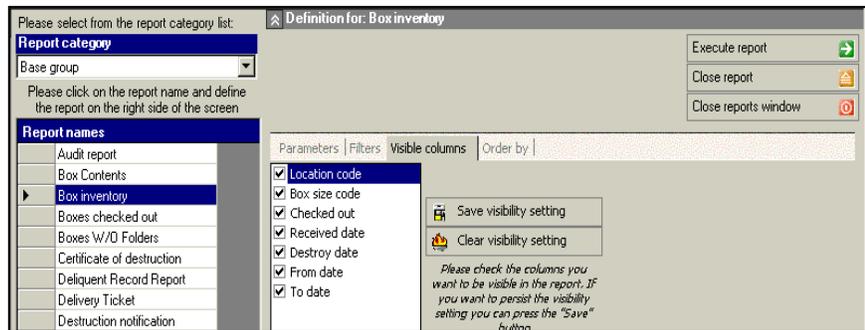
- **Chevrons** – Click the chevrons to open and close the filter and navigation panels.
- **Export report** – Click this icon to export the finished report to your choice of various file formats; PDF (the default and our recommended solution), Microsoft Excel, Microsoft Word, or Rich Text Format. A standard Windows navigation tree is used to create a path and name under which to save your file.
- **Print** – Click the Print icon to print your report using the specified printer.
- **Toggle group tree** – Click this icon to bring up a navigation tree to jump to clients, departments, locations, etc., depending on the report you are viewing.
- **Go to page** – Click to specify a page to jump to in the preview window.
- **Zoom** – Click this to display a pull down menu of available zoom sizes.
- **Find text** – Use this tool to find any character string in a report.
- **Full screen mode** – Use the Chevrons and Zoom to display your report in Full Screen Mode.

## BOX INVENTORY REPORT

The Box Inventory Report (*right*) has a large number of selection criteria. The best way to cope with them is to save special report formats for individual clients.

### Parameters

Page break on every department YES, NO, NONE *Fig 113*



### Filters

- Customer
- Department
- Received Date
- Box Contents
- Box Number
- Record Title Code
- Media Code

### Visible Columns

- Location code
- Box size code
- From date
- To Date
- Destroy date
- Check out information
- Received date
- Ranges

### Order By

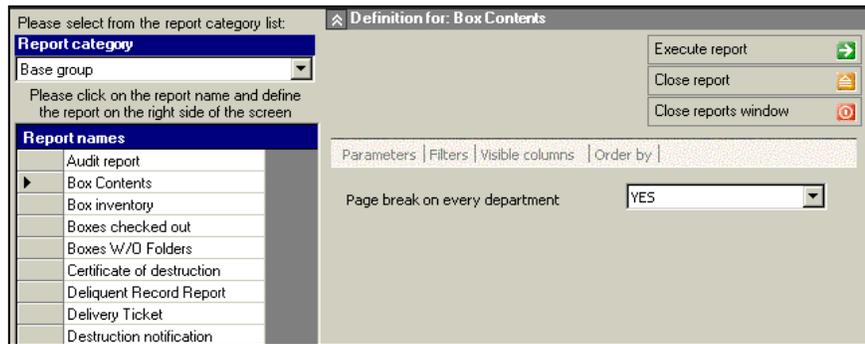
- Box #
- Client name
- Description
- Cross reference
- From date
- Received date
- Record Title Code
- To date
- Ranges

## BOX CONTENTS REPORT

The Box Contents Report is very similar to the Box Inventory Report and the filters are nearly identical, but it includes additional information about the folders within the box.

Fig. 114

As with the Box Inventory Report, the best way to work with selection criteria in this report is to save special report formats for individual clients.



## BOXES WITHOUT FOLDERS

This report lists all the boxes for the specified client for which there are no folders.

### Parameters

- Page Break on Dept  
Yes or No

### Filters

- Box number
- Customer
- Department
- Received date

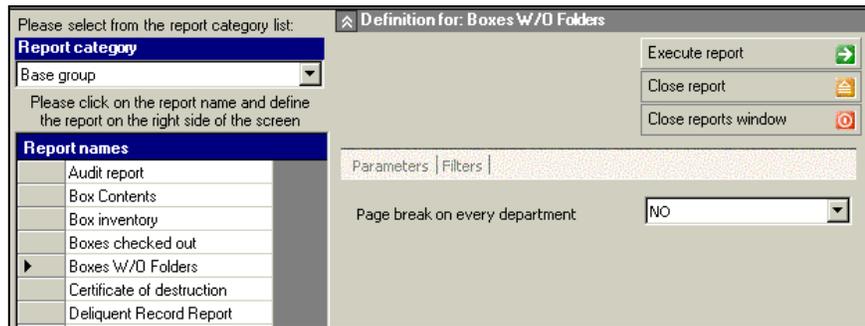


Fig. 115

## BOXES WITHOUT TAPES

This report lists all the boxes for the specified client for which there are no tapes. It is very similar to the boxes without folders report. It has the parameter for page break by department and the same filters as above.

## DESTRUCTION PROCESS

After boxes are destroyed, the Certificate of Destruction (Figure 85) is the list of the boxes that have been permanently removed or destroyed.

### Filters

- Customer
- Box number
- Destroy Date
- Ticket #

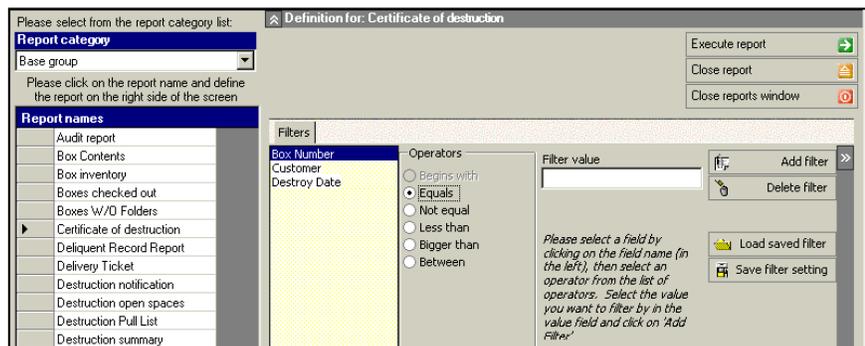


Fig. 116

## DESTRUCTION SUMMARY REPORT

The Destruction Summary Report (*right*) lists the number of boxes by code that have been destroyed or permanently removed

### Filters

- Customer
- Destroy Date
- Box size code
- Ticket #

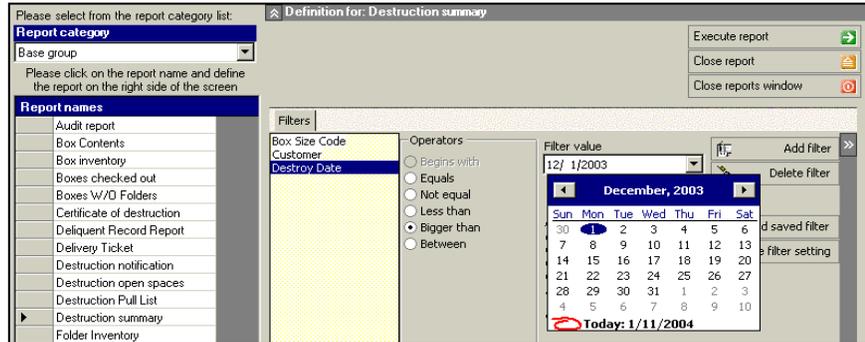


Fig. 117

As the illustration shows, when a date is used as a filter, a calendar applet appears from which you can choose the date.

## DESTRUCTION PULL LIST REPORT

Using the Destruction Pull List Report, set the filter to **destroyed boxes**. Then use the pull list filters to generate a report of boxes to pull for destruction or permanent removal.

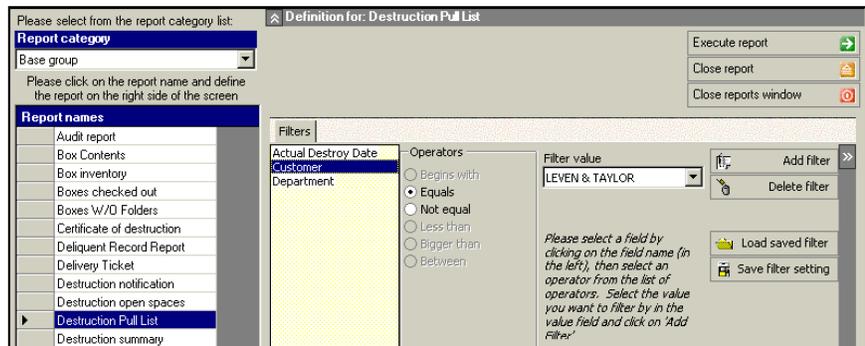


Fig. 118

## DESTRUCTION OPEN SPACES REPORT

The Destruction Open Spaces Report (lists the spaces in the center that have been opened as a result of a destruction or a permanent removal.

### Filters

- Actual Destroy Date
- Customer
- Date
- Location
- Ticket #

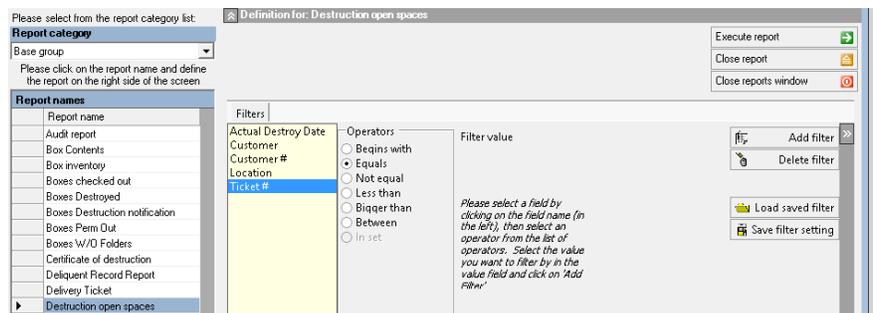


Fig. 119

## DELINQUENT RECORD REPORT

The Delinquent Record Report lets you impress your clients by reporting checked out items that have not been returned to Record Center by their Return By date.

Remember that, as each box or folder is checked out, Archive Manager automatically calculates 30 days from the current date and uses that as the Return By date. This process reviews this date and determines which items are now considered as late.

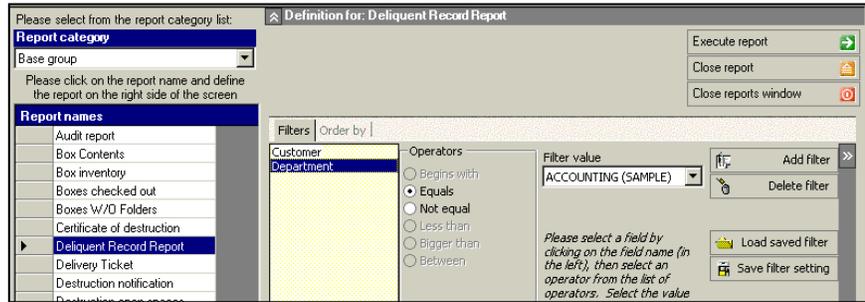


Fig. 120

### Filters

- Customer
- Department

### Order by

- Box Number
- Description

## DELIVERY TICKET REPORT

The delivery ticket is the document used to facilitate services to your client. It contains instructions to your driver with regards to pickup and delivery of boxes, folders, and magnetic tapes, and supplies such as preprinted labels. It also serves as confirmation for services rendered. Everything on a delivery ticket is driven by a work order.

This Delivery Ticket Report provides for printing of your pickup and delivery tickets.

### Parameters

- Mark as Printed (Y/N)
- Reprint (Y/N)
- Ticket Type
- Use alternate address
- Use dept address

### Filters

- Customer
- Department
- Ticket #

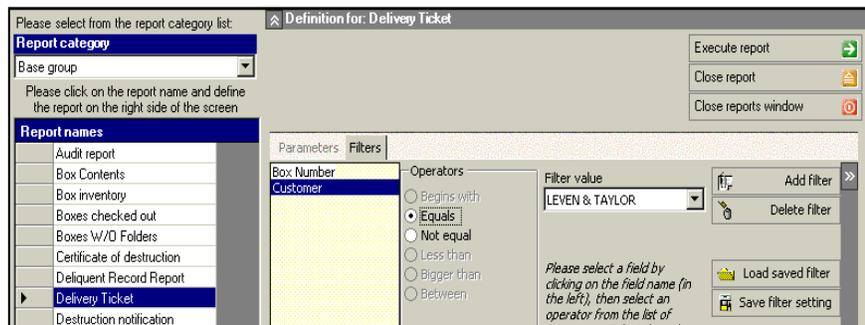


Fig. 121

## DESTRUCTION NOTIFICATION REPORT

The Destruction Notification Report (*Figure 91, below*) informs your clients when particular boxes are eligible for destruction. It is based upon the Destroy Date provided by them. If clients do not provide destroy dates, Archive Manager inserts the default value **12/31/9998** (never destroy) in the Destroy Date field.



**NOTE:** *This report does not destroy any boxes. It simply prints a report showing which ones are eligible for destruction based on the Destroy Date. Boxes are actually destroyed via the Destruction process.*

There are three signature spaces at the end of the report. It is advisable to have your clients sign their approval before proceeding with any destruction.

Fig. 122

### Parameters

- Include folders (Y/N)

### Filters

- Destroy date
- Customer
- Department
- Include folders
- Visible Columns
- Box number
- Location code
- Box size
- Receive date

### Filters (cont'd)

- Destroy date
- From date
- To date
- Description
- Record Title
- Cross reference

### Order By

- Box Number
- Client name
- Description
- Cross reference

## FOLDER INVENTORY REPORT

The Folder Inventory Report, like the Box Inventory and Box Contents Reports, has a large number of criteria. As with those reports, the best way to work with selection criteria in this one is to save special report formats for individual clients.

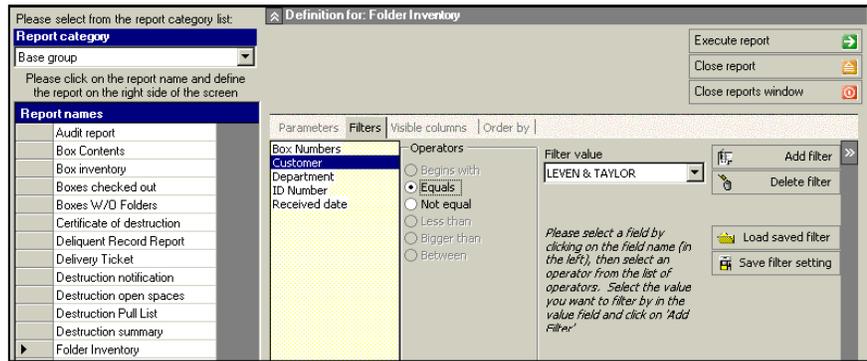


Fig. 123

### Parameters

- Page Breaks? (Y/N)
- Include Comments? (Y/N)

### Filters

- Customer
- Box Number
- Department
- Received Date
- ID
- Boxes with no folders

### Visible Columns

- Received date
- Destroy date
- From date
- To date
- Major description
- Minor description
- Matter No.
- Folder checkout
- Cross references

### Order By

- Box #
- Client name
- Cross reference
- Folder #
- Major
- Matter
- Matter #

## FOLDERS CHECKED OUT REPORT

The Folders Checked Out Report simply lists the folders that are currently checked out of the record center.

### Filters

- Customer
- Date Out
- Department

### Order by

- Major
- Minor
- Matter #
- ID

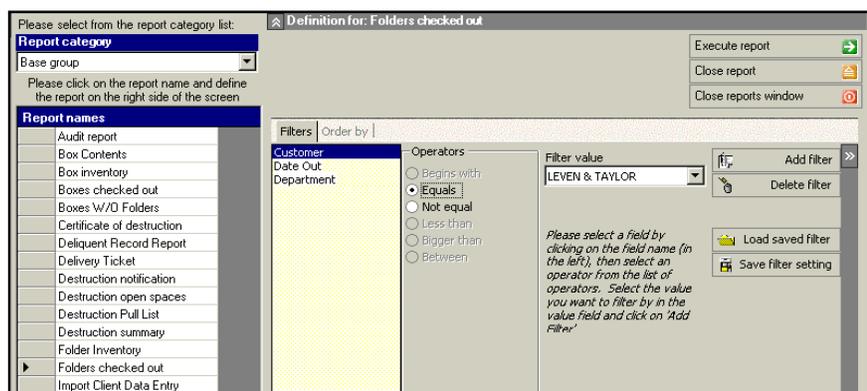


Fig. 124

## IMPORT CLIENT DATA ENTRY REPORT

The Import Client Data Entry Report displays the result of your import of client data.

### Filters

- Customer
- Username
- Box number
- Import date

### Order by

- Box #
- Date & Time

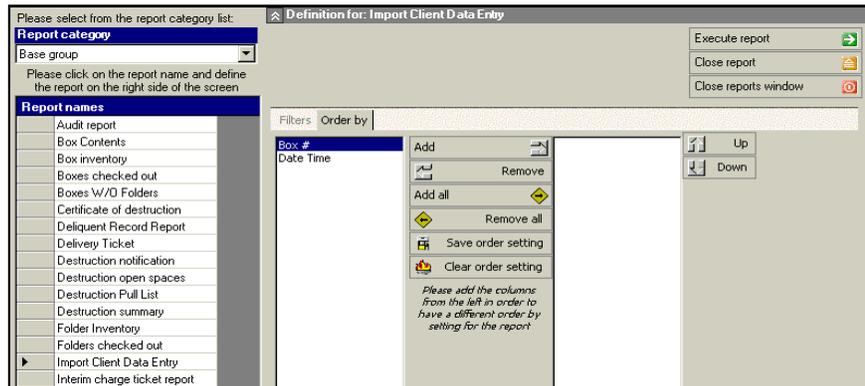


Fig. 125

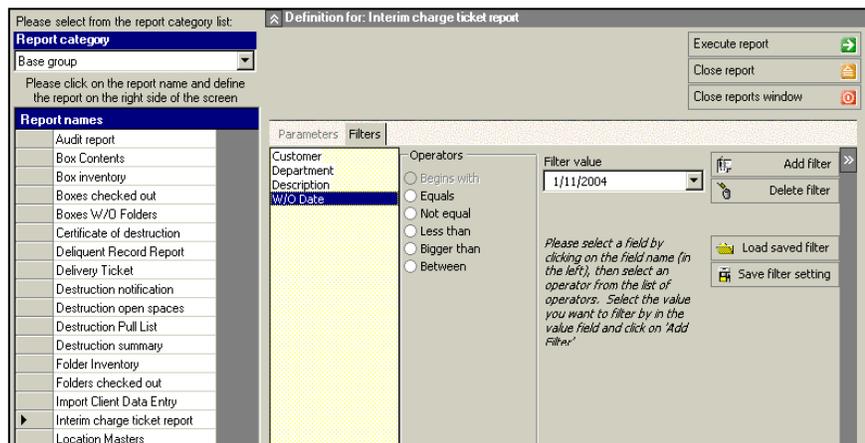
## INTERIM CHARGE TICKET REPORT

The Interim Charge Ticket Report can be run as often as may be required during the month. It is commonly used by record centers midway through the month to see how much service revenue they have accumulated.

Fig 126

### Parameters

- Show processed? (Y/N)



### Filters

- Customer
- Customer #
- Department
- Description
- Work Order Date

### Order by

- Client #
- Ticket #
- Ticket date

## LOCATION MASTERS REPORT

The Location Masters Report allows you to print three reports detailing your Location Masters. These permit you to analyze locations throughout the center to check for proper space utilization.

Fig 127

### Parameters

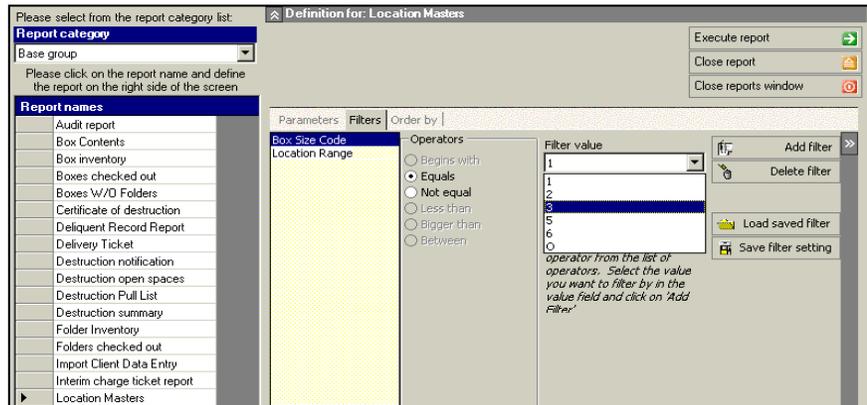
- Spaces with Open shelves - ALL, BOTH, YES, NO

### Filters

- Box Size Code
- Location Range

### Order by

- Location code (default order)
- Box size code

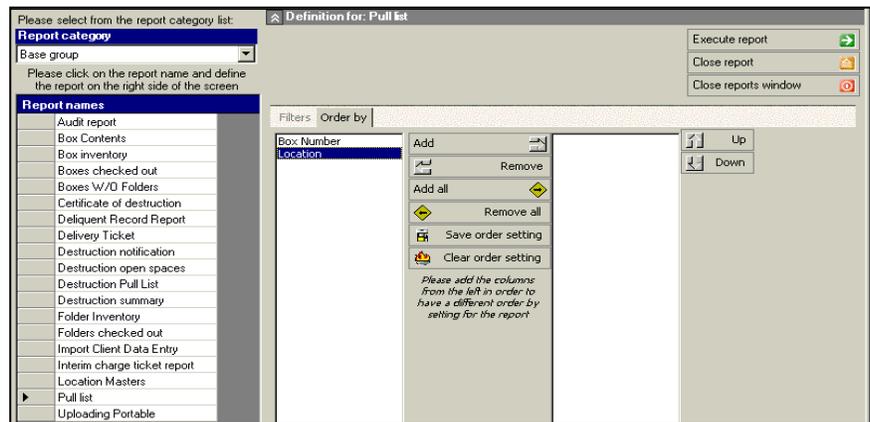


## PULL LIST REPORT

The Pull List Report is used for printing out your Pull List.

After boxes or folders are “pulled” for delivery, the Pull List can be updated to show that they have been removed, and that “Box Out” cards (Fig. 129, next page) have been generated. There is a bold heading below the location ‘Legal Hold’ for boxes being pulled.

Fig. 128



### Parameters

- Marked as printed
- Reprint

### (Filters, cont.)

- Going to
- Ticket #

### Filters

- Cross reference
- Customer
- Location
- Box Number

### Order by

- Box Number
- Location

## BOX AND FOLDER OUT CARDS

Box and Folder Out Cards are put in place of checked out boxes and folders to indicate their exact prior location. (*Folder Out card shown*)

### Parameters

- Mark as Printed (Y/N)
- Reprint (Y/N)

### Filters

- Client
- Location
- Ticket #

<b>Location</b> 5-O-035 / 8	<b>Box Number</b> 620145
Matter No : 9761-0098	
Major Description : NEWHOUSE, FERBER, & JANSEN	
Minor Description : INCORPORATION AGREEMENT	

	Fold Here
	Folder Out
	Card
<b>LOCATIONS</b>	5-O-035
<b>SPACE NUMBER</b>	8
<b>BOX NUMBER</b>	620145
<b>CROSS REFERENCE</b>	
<b>MAJOR DESCRIPTION</b>	NEWHOUSE, FERBER, & JANSEN
<b>MINOR DESCRIPTION</b>	INCORPORATION AGREEMENT
<b>MATTER NUMBER</b>	9761-0098
<b>ID NUMBER</b>	
<b>FOLDER NUMBER</b>	1
<b>BOX CONTENTS</b>	NEWHOUSE, FERBER, & JANSEN
<b>CLIENT CODE</b>	LEVEN
<b>Dept. CODE</b>	
<b>GOING TO</b>	STACEY BAER
<b>DATE OUT</b>	7/22/2014
<b>WORK ORDER</b>	00000372

<b>CHECKED OUT BY :</b> _____	<b>CHECKED IN :</b> _____
<b>DATE</b> _____	<b>DATE</b> _____
<b>TIME</b> _____	<b>TIME</b> _____

Fig. 129

## UPLOADING PORTABLE REPORT

This report prints the data from your portable bar code reader upload.

### Parameter

- Summary (Y/N)

### Filters

- Customer
- Department
- Portable date
- Portable hour (military time)

### Order by

- Date Time

The screenshot shows a software interface for configuring reports. On the left, a list of report names includes 'Uploading Portable'. The main area is divided into 'Parameters', 'Filters', and 'Order by' sections. The 'Filters' section shows 'Portable Date' selected. The 'Operators' section has 'Equals' selected. The 'Filter value' field contains '1/12/2004'. There are buttons for 'Add filter', 'Delete filter', 'Load saved filter', and 'Save filter setting'. A note at the bottom right says: 'Please select a field by clicking on the field name (in the left), then select an operator from the list of operators. Select the value you want to filter by in the value field and click on 'Add Filter'.'

Fig. 130

After uploading data, it is useful to run the following reports:

1. a **Summary Report**, then
2. a **Detail Report**.

The Summary Report provides a count of the items uploaded, per the field you selected as your filter.

Filters : Portable Date equals 7/24/2014	<b>Uploading Portable Bar Code Reader</b> Print Date 7/24/2014 Page number 1
Upload date and time: <u>07/24/2014</u>	
Client Code : 770	
Department -- N/A	
Number of BOX CHECK IN boxes : 2 Number of NEW BOX boxes : 3 Total Number of Boxes -- 5	
Client Code : ROYAL	
Department -- N/A	
Number of NEW BOX boxes : 4 Total Number of Boxes -- 4	
Client Code : SAMPLE	
Department -- N/A	
Number of NEW BOX boxes : 5 Total Number of Boxes -- 5	

Fig. 131

The Detail Report gives all the details for the uploaded items, sorted on the field you selected for your filter.

Filters : Portable Date equals 7/24/2014	<b>Uploading Portable Bar Code Reader</b> Print Date 7/24/2014 Page number 1																																													
Upload date and time: <u>07/24/2014</u>																																														
Client Code : 770																																														
Department -- N/A																																														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Box Number</th> <th>Folder Number</th> <th>Person</th> <th>Space #</th> <th>Location</th> <th>Date In</th> <th>Date Out</th> <th>Action</th> <th>Box Size Code</th> </tr> </thead> <tbody> <tr> <td>620126</td> <td></td> <td></td> <td>5</td> <td>5-C-034</td> <td></td> <td></td> <td>BOX CHECK IN</td> <td>1</td> </tr> <tr> <td>620139</td> <td></td> <td></td> <td>3</td> <td>14-A-065</td> <td></td> <td></td> <td>BOX CHECK IN</td> <td>1</td> </tr> </tbody> </table> Number of BOX CHECK IN boxes : 2		Box Number	Folder Number	Person	Space #	Location	Date In	Date Out	Action	Box Size Code	620126			5	5-C-034			BOX CHECK IN	1	620139			3	14-A-065			BOX CHECK IN	1																		
Box Number	Folder Number	Person	Space #	Location	Date In	Date Out	Action	Box Size Code																																						
620126			5	5-C-034			BOX CHECK IN	1																																						
620139			3	14-A-065			BOX CHECK IN	1																																						
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Box Number	Folder Number	Person	Space #	Location	Date In	Date Out	Action	Box Size Code																																						
620161			6	3-B-017			NEW BOX	1																																						
620163			1	3-B-018			NEW BOX	1																																						
620164			2	3-B-018			NEW BOX	1																																						
Department -- N/A																																														
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Box Number	Folder Number	Person	Space #	Location	Date In	Date Out	Action	Box Size Code																																						
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620166			4	3-B-018			NEW BOX	1																																						
620167			7	3-B-017			NEW BOX	1																																						
620168			8	3-B-017			NEW BOX	1																																						
Department -- N/A																																														
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Box Number	Folder Number	Person	Space #	Location	Date In	Date Out	Action	Box Size Code																																						
620156			1	3-B-017			NEW BOX	1																																						

Prepared by: RMS ARCHIVES, INC, 1354 MAIN STREET, EASTCHESTER NY 92504, (914) - 329 - 8900

Fig. 132

# Client Information Group

## CLIENT ACTIVITY REPORT

The Client Activity Report displays all activity for the date or date range specified. It can include:

- boxes received into the records center,
- boxes/folders checked out,
- boxes/folders returned, and/or
- boxes/folders destroyed or permanently removed.

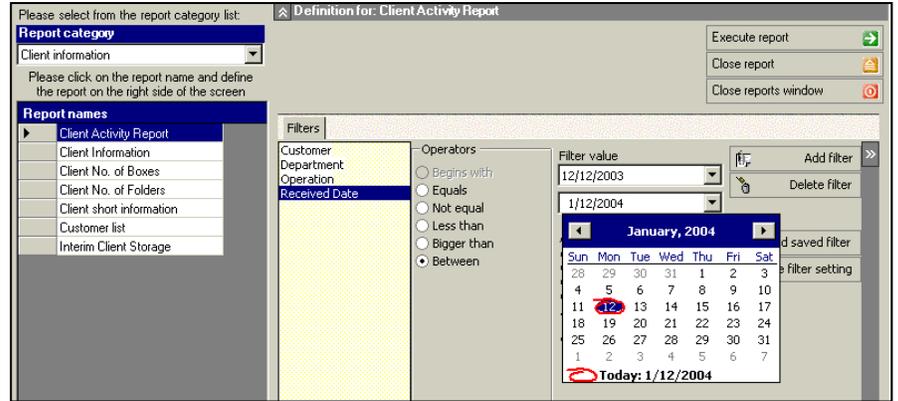


Fig. 133

It is generally helpful to run these reports once per month for your clients.

### Filters:

- Activity Date
- Customer
- Department
- Received Date
- Date Range
- Boxes Received into Record Center
- Boxes/ Folders checked out
- Boxes/ Folders returned
- Boxes/Folders destroyed or permanently removed

## CLIENT INFORMATION REPORT

The Client Information Report (Figure 83, right) displays the complete information about your clients as recorded in the Client Master File.

### Filters

- Customer

### Order by

- Client name

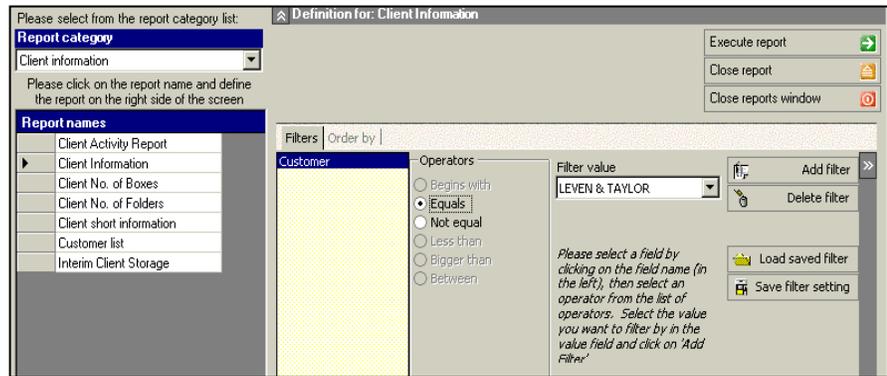


Fig 134

The resulting report is displayed below.

Filters  
Customer # equals leven

Client information sheet

Print date 5/11/2012  
PageNumber 1

**LEVEN & TAYLOR**

Client Code : LEVEN

**Client Information :**

LEVEN & TAYLOR 2000 FENWAY BLVD  PETERSVILLE, NY 10725-0021  <b>E-mail :</b> MEWING@LTLAW.COM  <b>www :</b> WWW.LTLAW.COM	<b>Office phone :</b> (815) - 566 - 8787 <b>Fax Number :</b> (815) - 566 - 8788 <b>Industry Code :</b> 2800
---	---

**Billing Information :**

**Notes / Comments**

LEVEN & TAYLOR 501 WEST FOURTH AVENUE  PHILADELPHIA, PA 20112-9655  <b>Billing Representative :</b> MIKE EWING <b>Billing Main Phone :</b> (815) - 566 - 8787	Deliver only folders out of boxes unless Mike Ewing authorizes otherwise. All invoices must be sent to the Philadelphia office including the departmental backup.
<b>Contract Information :</b>  Billing Rate per Cubic Foot : 45.00 Minimum Storage Fee : 9/19/2013 Contract Ending Date : Terms : Billing Type : Quarterly Box Rate : 0.00 Contact/Purchase Order Number : Contract Beginning Date : 11/19/2003	

Prepared by: RMS ARCHIVES CO LLC, 1234 MAIN STREET, EASTCHESTER NY 10905-6580, (800) -426- 7181

Fig. 135

## CLIENT NO. OF BOXES REPORT

The Client No. of Boxes Report displays the total number of boxes stored for a single client, or for all clients. It does not break out information by box size or storage revenue; that is the function of the Interim Client Storage Report.

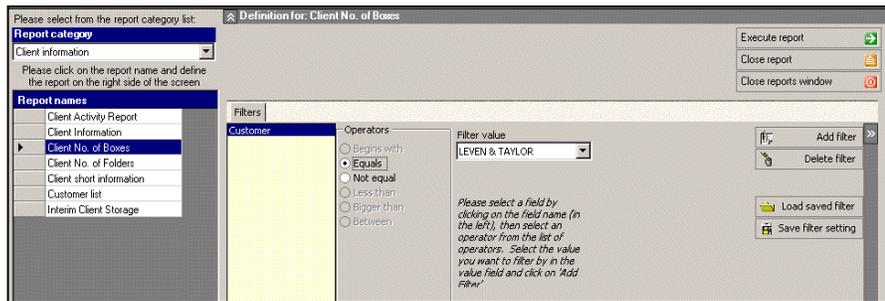


Fig. 136

### Filters

- Customer

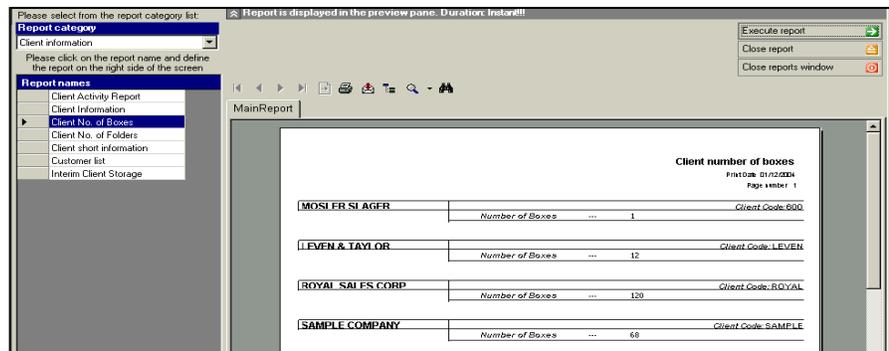


Fig. 137  
(result)

## CLIENT NO. OF FOLDERS

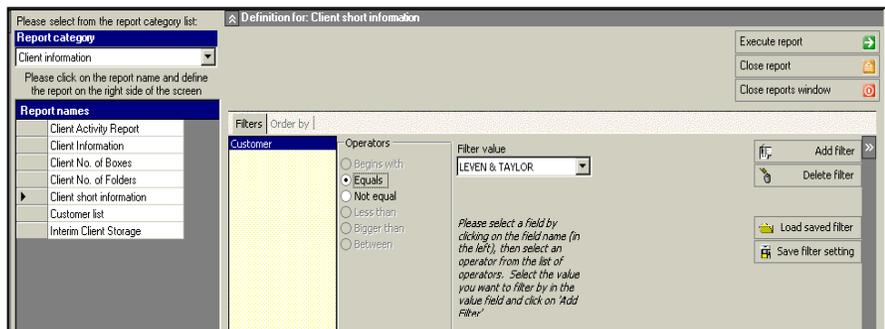
This report is identical to the one above (except that it is for folders).

## CLIENT SHORT INFORMATION REPORT

This report provides a listing of clients'...

- names,
- client codes,
- main contacts, and
- telephone numbers.

Fig. 138 (setup)



Filters :

### Client Short Information

Print Date 7/24/2014  
Page number 1

Client Name	Client Code	Main Phone	Contact Name	Email
AELMAN, BEECH, SINCLAIR	8070	(212) - 432 - 6600	WANDA SMYTH	WSMYTH@AECCPA.BIZ
ASH, SANFORD, CONNOR	ASC001	(914) - 636 - 5090	LARYY DUNOHREY	LDUNPHREY66@MAIL.COM
BANCO ITALIA	8040	(212) - 343 - 2100	ROBERTO FERMI	RFRMI@BITALIA.COM
GARRISON SECURITIES	4501	(212) - 566 - 6899	ED DOYLE	EDOYLE@GSCO.COM
GOLLER FOUNDATION	6870	(213) - 543 - 2210	TARA BLAKE	TBLAKE@GOLLERFND.ORG
HARRISON INSURANCE	4580	(212)-621-9100	DOUG WILSON	FCLEMENT@HINS.COM
HITCH CAMPBELL MURPHY	7400	(212) - 445 - 6700	FDENNIS@HCFLAW.COM	FDENNIS@HCFLAW.COM
JAMES LAW	JA001	(203)-293-9870	JOHN JAMES	DONNA@JAMESLAW.COM

### Filters

- Customer
- Order by
- Client name

Fig. 139(result)

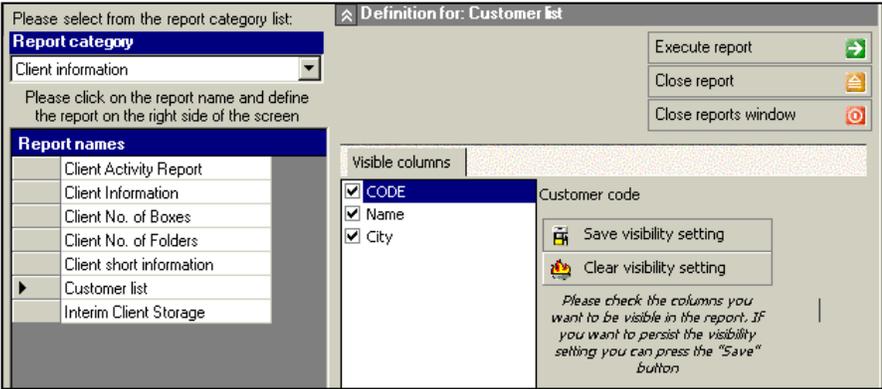
**CUSTOMER LIST REPORT**

This report displays customer by city and state and can be filtered by Industry.

**Visible Columns**

- Code
- Name
- City

Fig. 140



**INTERIM CLIENT STORAGE REPORT**

This report selects and summarizes currently stored boxes by Department and Box Size Code. This same report is automatically prepared as part of the Month End Process and provides another view of how each customer is billed for storage charges.

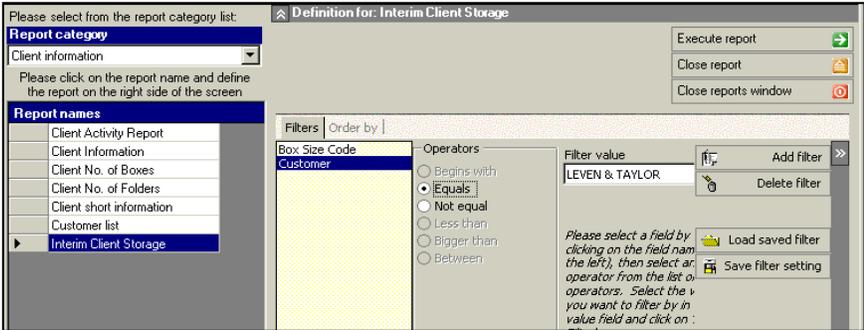


Fig. 141

**Filters**

- Client
- Department

**Order by**

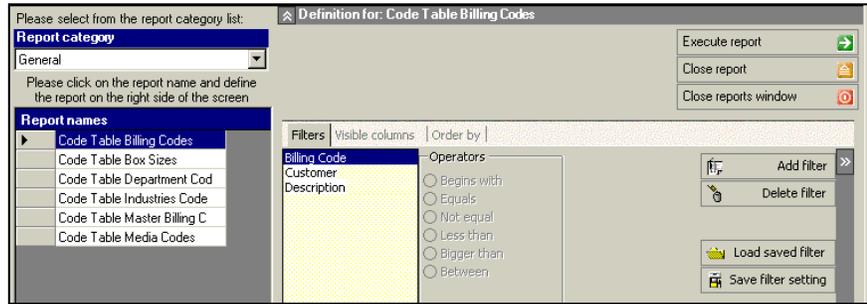
- Box size code
- Client
- Department

# General Group

## CODE TABLE BILLING CODES REPORT

The Code Table Billing Codes Report displays the billing code charges for each of your clients.

Fig 142



### Filters

- Customer
- Billing Code

### Visible Columns

- Billing rate
- Taxable
- Tax rate
- Pro rate
- Auto bill

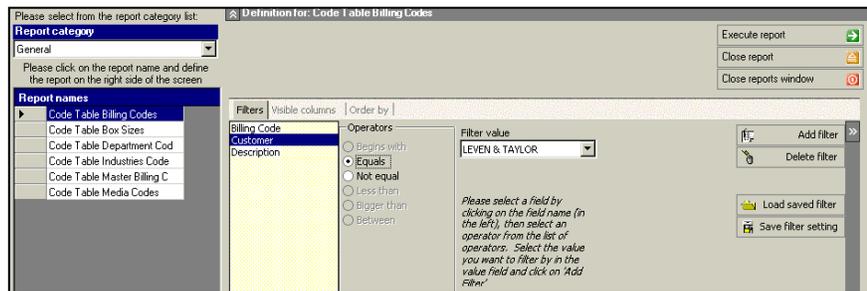
### Order By

- Billing codes
- Customer

## CODE TABLE BOX SIZES REPORT

The Code Table Box Sizes Report lists the box size code charges for each of your clients.

Fig. 143 (setup)



### Filters

- Customer
- Box Size Code

### Order by

- Box size codes
- Customer

ClientCode :600				
Box Size Code	Box Size Description	CUBICFEET	COST PER BOX	Comments Notes
0	OVERSIZE	5.00	1.85	
5	ROLLS PLANS	0.70	0.35	
6	MYSIZEBOX	0.50	1.20	
1	ARCHIVE CARTON	1.20	0.40	
2	TRANSFILE	3.00	0.85	
3	CHECKFILE	2.00	0.00	
ClientCode :LEVEN				
Box Size Code	Box Size Description	CUBICFEET	COST PER BOX	Comments Notes
2	TRANSFILE	3.00	0.85	
3	CHECKFILE	0.00	0.00	
1	ARCHIVE CARTON	1.20	0.40	
ClientCode :ROYAL				
Box Size Code	Box Size Description	CUBICFEET	COST PER BOX	Comments Notes
1	ARCHIVE CARTON	0.00	0.40	
3	CHECKFILE	0.00	0.00	
2	TRANSFILE	0.00	0.85	

Fig. 144 (result)

## CODE TABLE DEPARTMENTS REPORT

The Code Table Departments Report lists the Department Codes for clients.

### Filter

- Customer

### Order by

Department codes

- Customer

Definition for: Code Table Department Codes

Execute report  
Close report  
Close reports window

Filters | Order by |

Customer  
Description

Operators

- Begins with
- Equals
- Not equal
- Less than
- Bigger than
- Between

Filter value  
LEVEN & TAYLOR

Add filter  
Delete filter  
Load saved filter  
Save filter setting

Please select a field by clicking on the field name (in the left), then select an operator from the list of operators. Select the value you want to filter by in the value field and click on 'Add Filter'

Fig. 145

## CODE TABLE INDUSTRIES CODE REPORT

This report lists the Industry Codes that have been set up in Archive Manager.

### Filters

- Industries Codes
- Industries Names

Definition for: Code Table Industries Codes

Execute report  
Close report  
Close reports window

Filters | Order by |

Industries Codes  
Industries Names

Operators

- Begins with
- Equals
- Not equal
- Less than
- Bigger than
- Between

Filter value  
CONCRETE INDUSTRY

Add filter  
Delete filter  
Load saved filter  
Save filter setting

Please select a field by clicking on the field name (in the left), then select an operator from the list of operators. Select the value you want to filter by in the value field and click on 'Add Filter'

Fig. 146

## CODE TABLE MEDIA CODES REPORT

The Code Table Media Codes Report lists the Media Codes set up in the system.

### Filters

- Media Codes
- Media Names

Definition for: Code Table Media Codes

Execute report  
Close report  
Close reports window

Filters | Order by |

Media Codes  
Media Names

Operators

- Begins with
- Equals
- Not equal
- Less than
- Bigger than
- Between

Filter value  
LAW FIRM RECORDS

Add filter  
Delete filter  
Load saved filter  
Save filter setting

Please select a field by clicking on the field name (in the left), then select an operator from the list of operators. Select the value you want to filter by in the value field and click on 'Add Filter'

Fig. 147

## CODE TABLE RECORD TITLES REPORT

The Code Table Record Titles Report lists the Retention Codes for clients.

### Filters

- Customer
- Customer #
- Record Title Code

### Order by

- Client
- Description
- Record Title

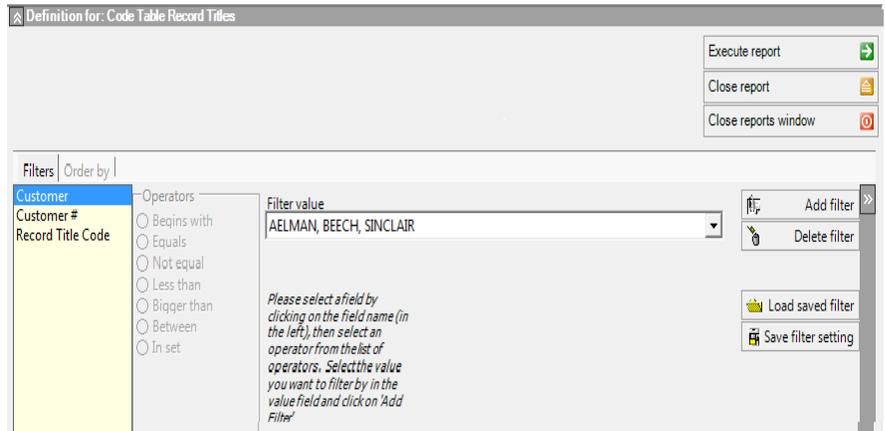
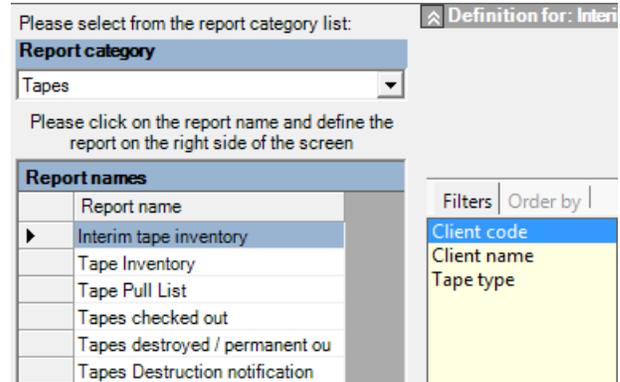


Fig. 148

## The Tape Group

The Tape Group, like the other categories, is accessed from the pull-down Report Category menu (right).

Fig. 149



### INTERIM TAPE INVENTORY REPORT

This report selects and summarizes currently stored tapes by Tape Type broken out by Client. It defaults to printing in client name order.

#### Filters

- Client name
- Client code
- Tape Type
- Department

#### Order by

- Client name (default)
- Client code

### TAPE INVENTORY REPORT

The Tape Inventory Report lists the tapes in Archive Manager.

#### Parameters

- Tape is in vault – Y/N
- Page break by dept. – Y/N
- Page break by box – Y/N

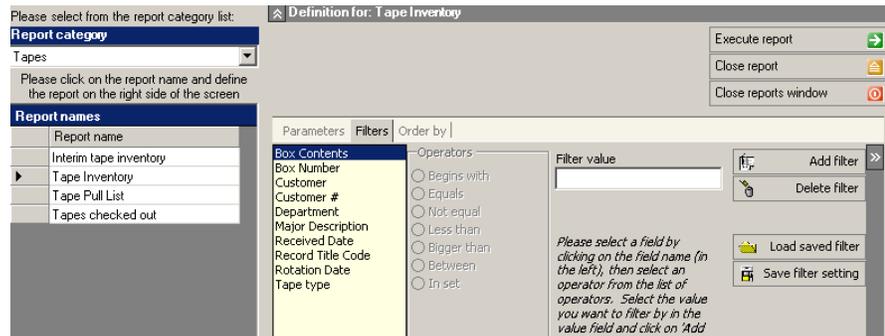


Fig. 150

#### Filters

- Customer
- Customer #
- Department
- Major description
- Received Date
- Record Title Code
- Rotation Date
- Tape type

#### Order by

- Box #
- Cross reference
- From date
- Major description
- Matter #
- Tape #
- Tape type
- ID
- To Date

#### TAPE PULL LIST REPORT

The Tape Pull List Report is very similar to a Box Pull List.

##### **Parameters**

- Page break by dept. – Y/N

##### **Filters**

- Customer
- Customer #
- Department
- Major description
- Received Date
- Record Title Code
- Rotation Date

##### **Order by**

- Box #
- Cross reference
- From date
- Location
- Major
- Tape #

#### TAPES CHECKED OUT REPORT

This report lists all tapes currently checked out

##### **Filters**

- Customer
- Customer #
- Date out
- Department

##### **Order by**

- Box #
- Major
- Tape #

## TAPES DESTRUCTION NOTIFICATION REPORT

The Tapes Destruction Notification Report informs your clients when particular tapes are eligible for destruction. It is based upon the Destroy Date provided by them. This report is set up similar to the Boxes Destruction Notification and Folder Destruction Notification reports.

### **Filters**

- Box#
- Customer
- Customer #
- Destroy Date

### **Order by**

- Client name
- Cross reference
- Major
- Minor
- Tape #

## TAPES DESTROYED/ PERMANENT OUT REPORT

The Tapes Destroyed / Permanent Out Report lists the tapes that have been destroyed or permanently removed.

### **Filters**

- Customer
- Customer #
- Date Destroyed/ Permanently removed
- Operation
- Ticket #

## Chapter 15 – Labels

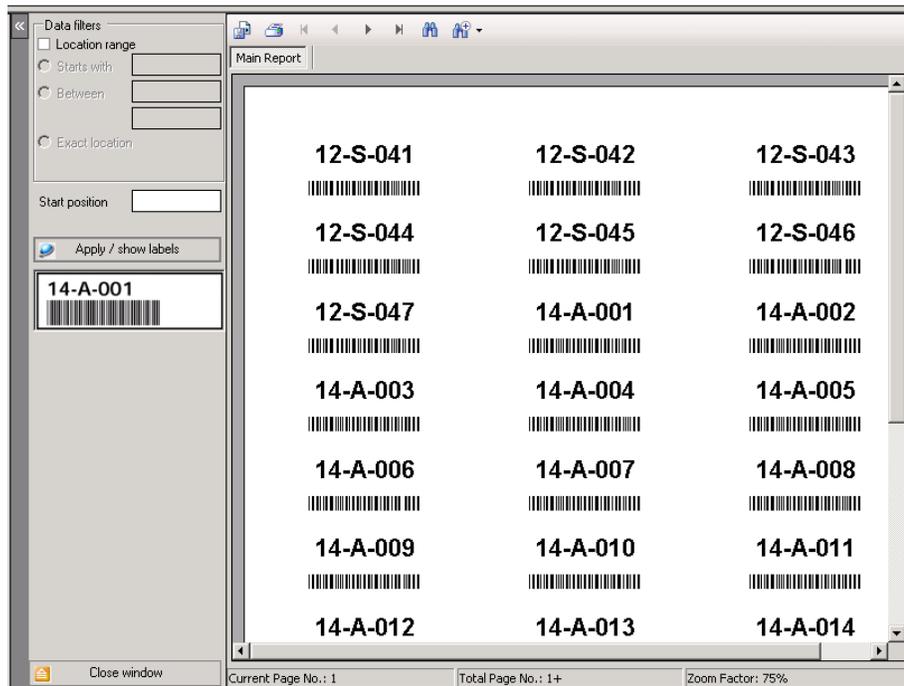
To access Archive Manager's label feature, click Label on the Menu Bar, and select the label you want to print. The choices are:

- Client address labels
- Permanent (box) labels
- Client labels
- Folder labels
- Shelf labels
- Tape labels

### Shelf Labels

This feature prints the bar coded labels that will be affixed to each shelf. The information on the labels comes directly from the information you provided at the Locations List screen (Fig. 16). The correct label size to use is 30 labels to a page (i.e., Avery #5160).

Fig. 151



The Shelf Label printer provides three label numbering options:

- Click the **Exact location** radio button to print a sheet of identical labels.
- Click the **Starts with** radio button to print 30 consecutively numbered labels starting with the number you enter in the field to the right.
- Click the **Location range** checkbox to specify a range of labels to print.

It also provides for the starting position of the label (1 through 30) so you can reuse label sheets.

After entering your preferences, click the **Apply/show labels** button. The labels will appear in the preview screen. To print the labels, click the printer icon and select your printer.

Use the **Search** (binocular) button to find a specific label, and the **Zoom** (magnifying glass) button to adjust the display size.

## Client Labels

Client Labels are managed and printed from the Client Label screen (Figure 94). These labels are generally preprinted and provided to your client, who should be instructed to place a label in a prescribed location on each box before calling for a Pick Up. They contain a client name and bar code, a box bar code, and a department name (if applicable).

Fig. 152



**NOTE:** *If your clients are using the optional Web Based Client Data Entry software,*

*which requires them to key in their own Box and Folder Information, they should be instructed to input the number from the pre-printed label for each box as they enter their Box and Folder Information.*

To select a client for the labels, choose among the following:

- Click the **Client** radio button to select a client from the scroll menu
- Click the **Client name starts with** radio button to input the first letters of the client's name.
- Click the **Client #** to input the client's code
- Click the **Client # starts with** radio button to input the first letters of the client's code

To include a department code on the label click **Use Departments**.

To set the label numbers, either:

- Click the **Beginning with box #** radio button to input the starting box number, or
- Click the **New labels** checkbox to have Archive Manager print the number of consecutive labels you prescribed in # of labels box, beginning with the next unused box number in the system.

Click the radio button to select either

- 6 labels per page; or
- 4 labels per page.

Display and print the labels as described for Shelf labels, above.

## Permanent Box Labels

As each new box is keyed in to Archive Manager or uploaded from the Portable Bar Code Reader, the information is recorded in the Box Label file. Archive Manager does not print the labels while data is being entered, but waits until you open the Permanent Box Label screen (*right*) and run the permanent box label printing process.

Fig. 153

Special permanent labels are custom manufactured in portrait format for Archive Manager.

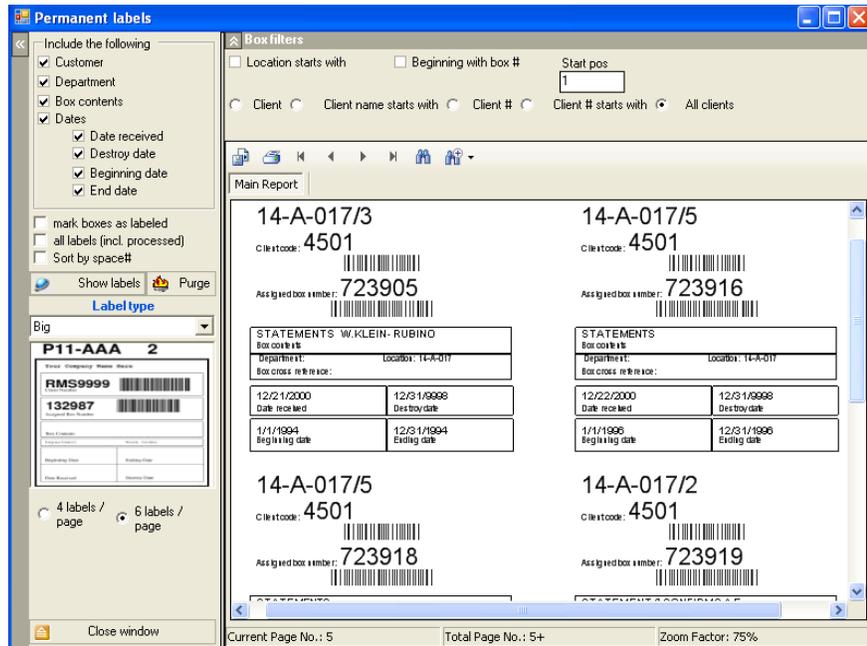
Boxes may be removed from the center for extended periods and then returned. Because **permanent** labels display specific pre-assigned box locations, they are more practical for use by record centers that reserve the open locations than for those that allow the Portable Bar Code Reader to reassign them.

- **Client** and **Location** – these filters function as on the Permanent Client Label screen, above.
- **Starting pos** – allows you to use a partially printed label sheet by selecting the starting position of the label
- **Include the following** – these choices, which are self-explanatory, let you tailor the information on the printed labels to suit your needs.
- **Mark boxes as labeled** – this control prevents these labels from being reprinted again in future runs.
- **All labels including processed** – reprint previously printed labels
- **Sort by space #** - labels automatically sort by location. This adds an additional sort.
- **Process labels as printed?** – flag these labels as printed? (*right*)

Fig. 154

- **Label type** – either:
  - ❖ **Small**, which displays basic information; i.e., box number, client bar code, and location; or
  - ❖ **Big**, which includes information from the box form, including box contents, department, and dates.
- **Labels per sheet** –
  - ❖ 6 labels per sheet; or
  - ❖ 4 labels per sheet.

Display and print the labels as described for shelf labels, above. When you are finished, the purge button will clear the file of all the processed labels.



## Folder Labels

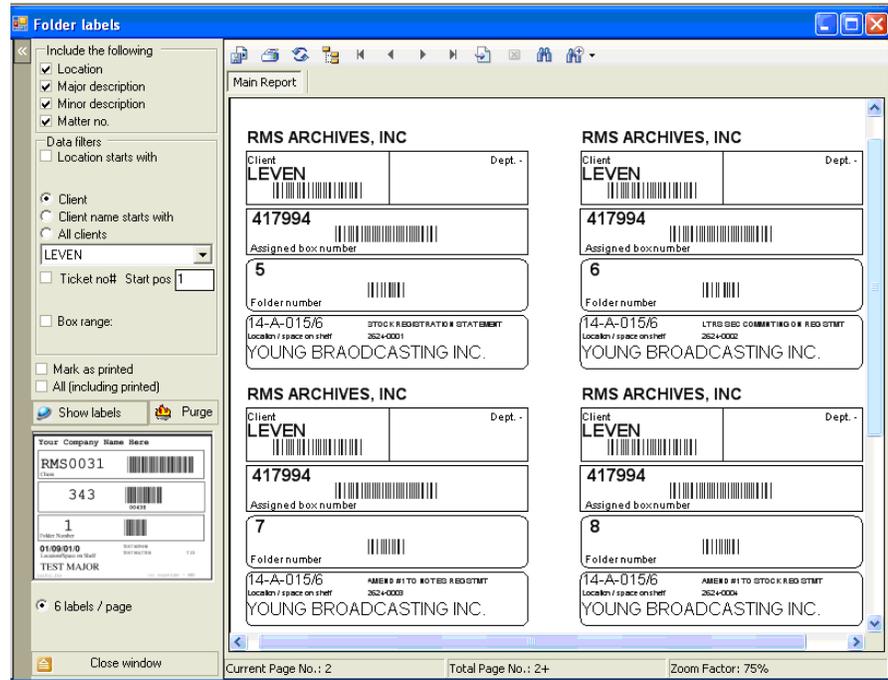
As each new folder is keyed in to Archive Manager or uploaded from the Portable Bar Code Reader, as with permanent box labels, the information is recorded in the Folder Label file. Archive Manager does not print the labels while data is being entered, but waits until you open the Folder Label Screen (*right*) and run the folder label printing process.

Fig. 155

The controls on this screen function very much like those on the Permanent Box Label screen, above. The choice of data to print, however, includes *Major and Minor Description*, and *Matter no.*, which are used only for folders.

There are filters for Location, Client, Ticket # range, Box # range, and Starting position.

The labels are printed 6 to a page.



## Tape Labels

The controls on this screen function very much like those on the Folder Label Screen.

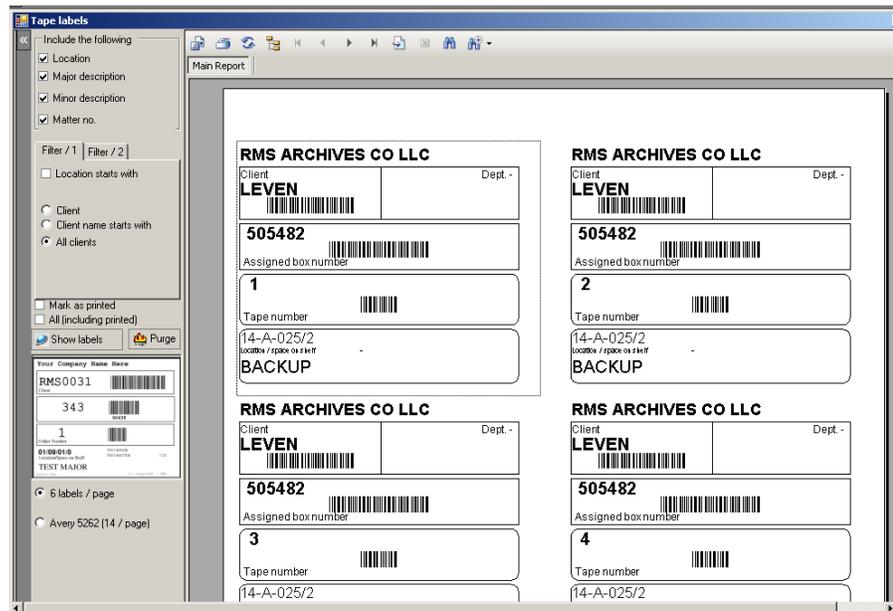
Fig 156

There are 2 formats for the tape label; 6 per page (shown) and a special 14 per page label (Avery 5262).

The filters are the same as the folder labels above, but have been divided into 2 pages.

Page 1 has Location and Client filters

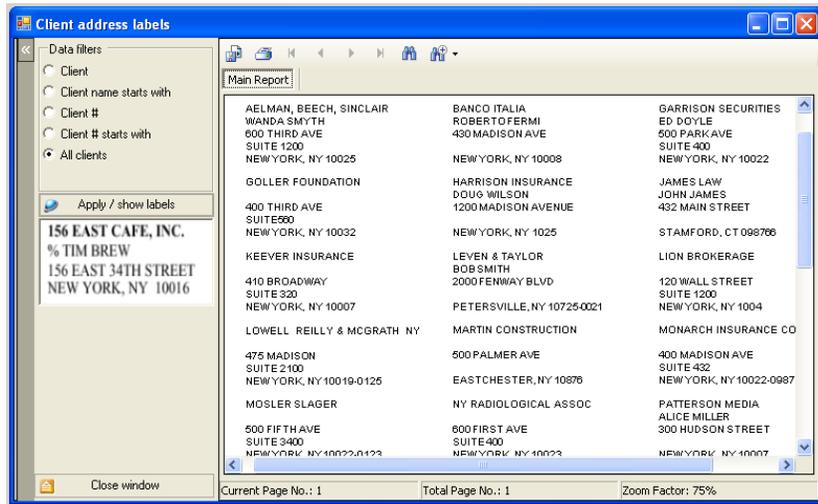
Page 2 has filters for Ticket #, Box #, and Starting position.



## Client Address Labels

These labels can be run for an individual client or all clients. These are very useful for mailing promotions (*below*).

Fig. 157



## Chapter 16 – Portable Upload



Fig. 158

Use of the optional Portable Bar Code Reader (*left*) with Archive Manager is simple and practical, and provides tremendous savings as compared to collecting data manually. Archive Manager downloads the collected data from the reader to a text file on the host PC as ASCII characters (unformatted text). A guide to the data format used in these files is located in *Appendix B* of this manual.

To access the Portable Parser facility in Archive Manager, on the menu bar, click **Portable > Portable**.

After you have scanned items and are ready to upload data, open the Portable Parser (*Fig. 159, below*) and follow the steps in the gray window.

As Archive Manager reads the data, it appears in the window on the upper left. If you discover that you have scanned something incorrectly, you can modify the data manually here, or you can just continue reading the data. The upload is unaffected; Archive Manager ignores any errors and continues reading good items.

When the data has been read, click **Upload Data** in the lower left of the upload screen. The lower window will fill with the uploaded information, and your data is saved to the database.

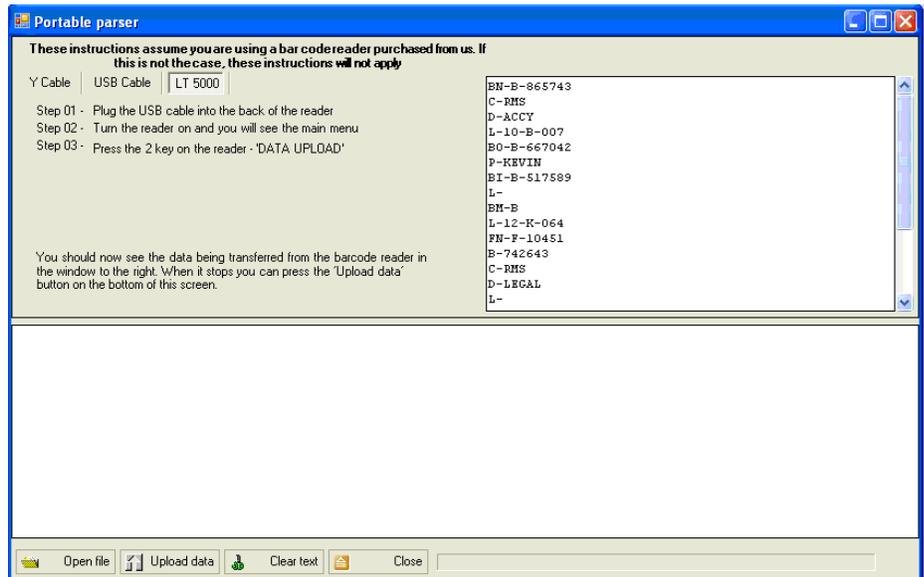


Fig. 159

For a report on the uploaded data, go to the Reports module (*Chapter 14*) and run the Uploading Portable report.

### Uploading external data

Many of our centers have become quite sophisticated with the portable reader and upload the bar code reader data to a text file. These text files may be uploaded by clicking on the Open file tab in the lower portion of the upload screen. You can then navigate through drives and folders to select your data file. Once selected the file appears in the window in the upper left and may be edited and uploaded as described above.

## Chapter 17 – Import/Export of Client Data

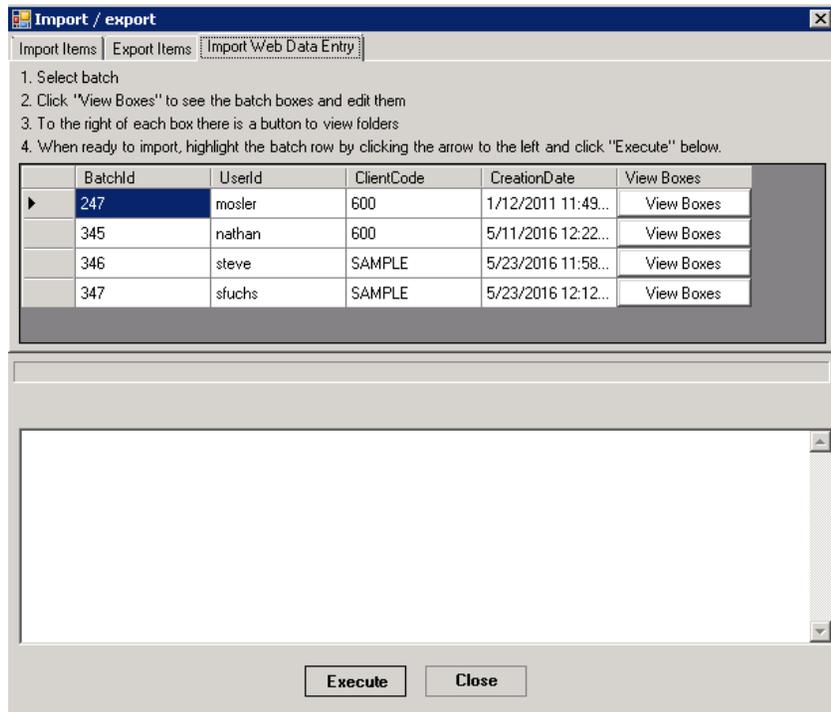
### Importing Web Data Entry Batches

Archive Manager's optional Web Data Entry Client Software can be accessed on any number of your client's PCs. Please see Appendix D for instructions. Please contact Record Management Software to purchase a software license.

The Web Data Entry Software allows clients to enter Box and Folder information into a separate database on your server by a batch process. They then notify you by an email via Archive Manager's Web-based Client Data Entry Software.

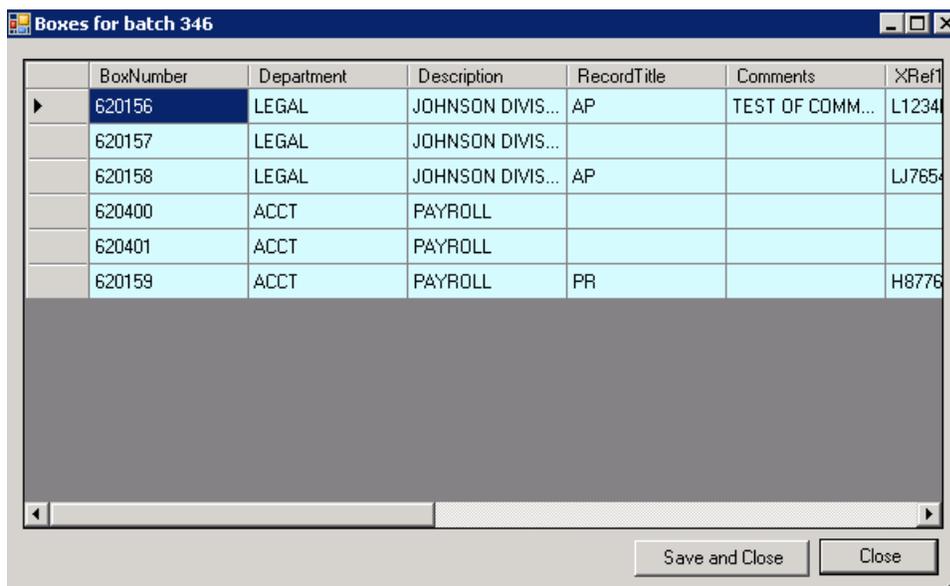
To open the Import/Export Module (*right*), click the **Import** icon in the activity pane's shortcuts panel, or from the task bar menu, click **Action>Export/ Import**.

Fig. 160



After receiving a batch from Web Data Entry, click the Web Data Entry Import tab, you can then process the data as follows:

1. First click View Boxes to see a grid of the boxes which can be edited. *Fig. 161*



2. To the far right you can click View Folders to see the folders in that box and edit them.

3. Finally, highlight the batch by clicking the arrow to the left of the batch # and click the **Execute** button at the bottom of the form. You will be asked to navigate to the directory where the rejected boxes and folders will be saved in XLS format. The data will fill the lower white pane of the Import Window.

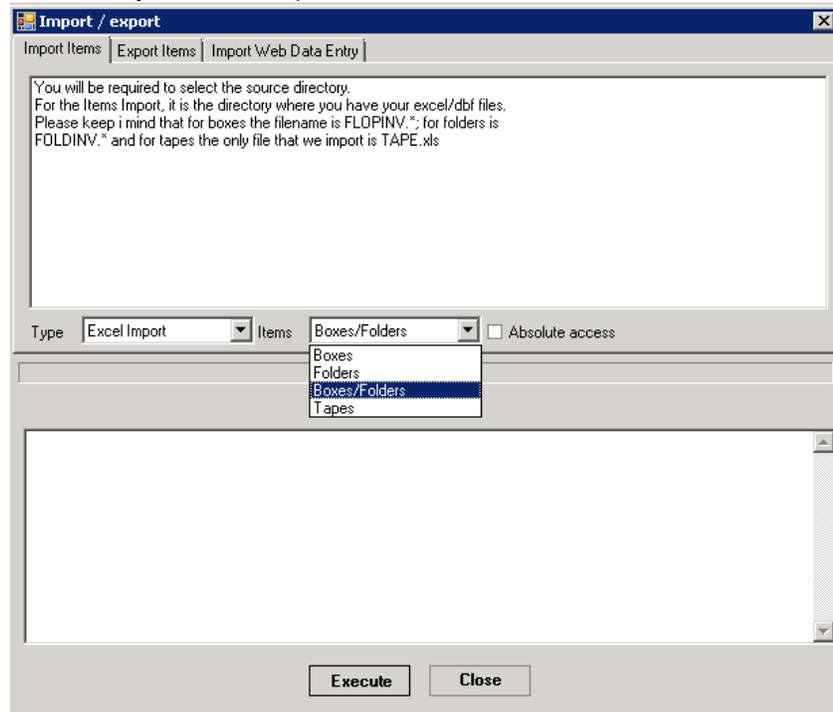
When you have completed the process, it is a good idea to run the Import Client Data Entry Report (see *Reports, Chapter 14*) on the uploaded information.

## Importing a Clients' Box/Folder Data

After receiving and entering the boxes and/or folders or tapes in Archive Manager, via either the keyboard or the portable bar code reader, you can then process the data as follows:

1. First, note **Type**, the format of the files that you are importing; either
  - Excel files (.XLS)
2. Next, select whether the information is Boxes, Folders, Boxes/Folders, or Tapes.
3. Finally, click the **Execute** button at the bottom of the form. You will be asked to navigate to the directory where the files are stored. The data will fill the lower white pane of the Import Window.

When you have completed the process, it is a good idea to run the Import Client Data Entry Report (see *Reports, Chapter 14*) on the uploaded information. *Fig. 162*



Note this utility also imports tapes.

### Manually entered boxes

For standalone users and others who enter new boxes manually into Archive Manager, make sure that a proper location is entered in the Location field. The process is the same as above, except that the box will now be added to the system as a new box.

## Exporting a Client's Box/Folder Data

This feature is used to copy box and folder information; and tape information into Excel files for delivery back to your client. It can also be used to make a copy of the information as it now resides in Archive Manager for clients who have just licensed their use of the Web SIMPLE Records Manager.

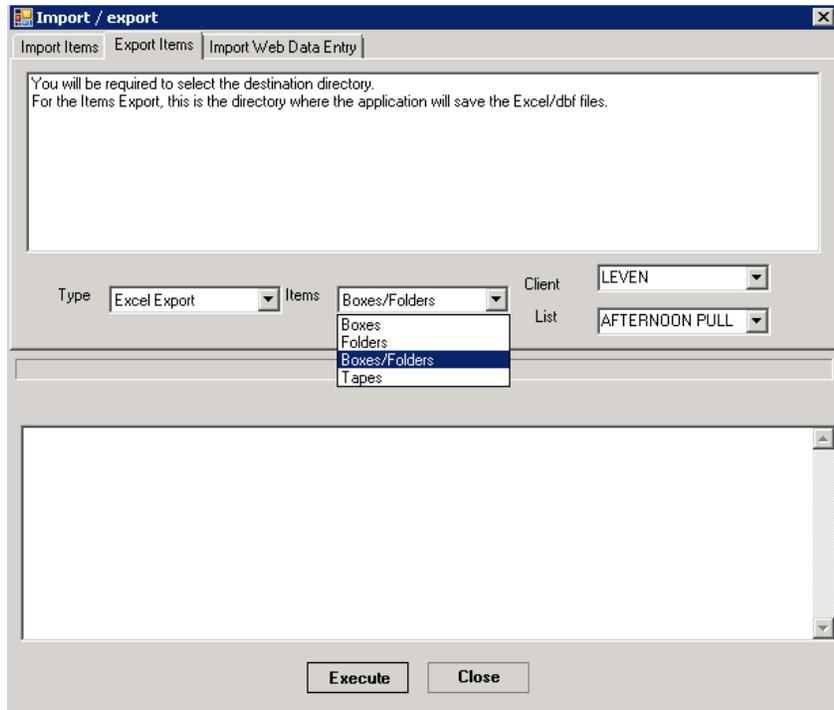
To export information, go to the Export Module (*below*) and follow this procedure:

1. The format for the files you are going to provide the client is shown in **Type = Excel Export**.
2. Select Boxes/Folders, Boxes, Folders, or Tapes.
3. Select the client or list, or enter the Client Code.
4. Click the **Execute** button at the bottom of the screen and navigate to where you want to copy the data.

Fig. 163

The files may be emailed or copied onto to a USB drive, for delivery to your client.

**NOTE:** Remember that you are giving your client an electronic copy of their data, which may be used for import into most software programs – including those of your competitors. A precautionary alternative is to run a complete inventory report to a PDF file for your client (See Chapter 14, Reports) for clients who request an electronic copy of their data.



## Chapter 18 – Utilities

### Mass Change Clients

The Mass Change Clients Utility is used to change the Client Code of multiple boxes to that of another client. It can operate on either a list, or on a group of boxes.

One application for this would be if a partner of a client law firm left that firm and wished to set up his own account with you.

1. In the Maintain Boxes screen, (right) select multiple boxes whose Client Code you want to change.
2. Right-click to bring up the action menu;
3. Click **Utilities**, then **Change Client**.  
(The new code must be for a pre-existing client.)
4. Finally, use the filters to select the new client code. This will automatically change the folders associated with these boxes.

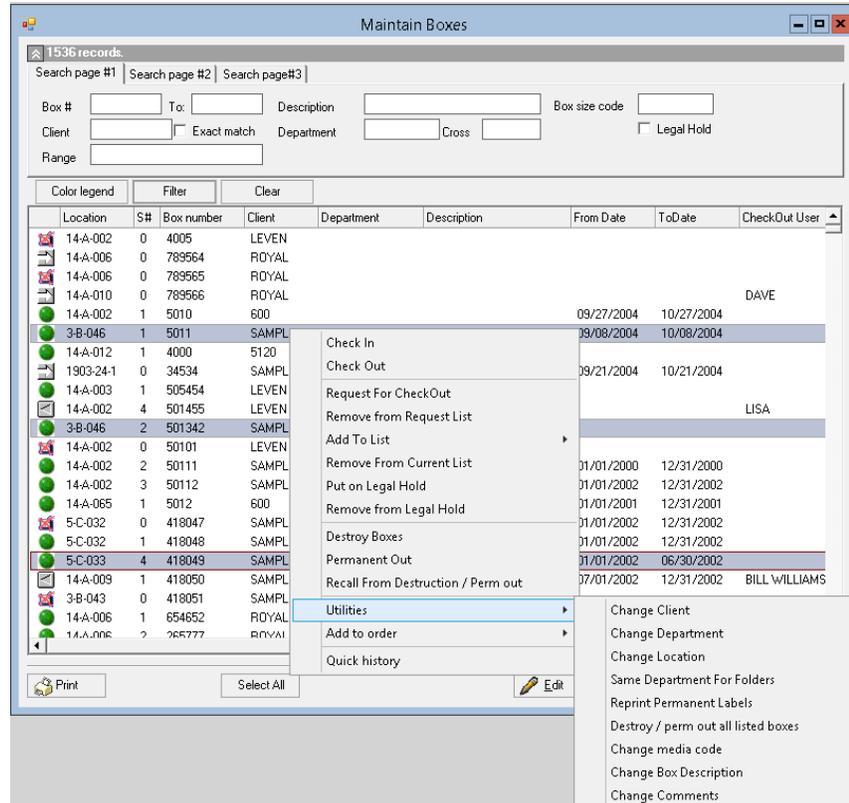


Fig. 164

### Mass Change Departments

This utility is used to change the department code of multiple boxes belonging to a specific client. It can operate on either a list, or on a group of boxes. The department having the code to which you will change must be an existing department for this client in Archive Manager, or a new one must be set up for the purpose.

In the Maintain Boxes screen, select multiple boxes whose department code you want to change. Then follows steps 2 through 4 above, selecting Change Department instead of Change Client.

### Mass Change Box Description

This utility is used to change the description of a group of boxes. It can operate on either a list, or on a group of boxes. In the Maintain Boxes screen, select multiple boxes whose department code you want to change. Then follows steps 2 through 4 as for the Mass Change Clients Utility, selecting Change Box Description instead of Change Client.

## Mass Change Box Comments

This utility is used to change the comments of a group of boxes. It can operate on either a list, or on a group of boxes. In the Maintain Boxes screen, select multiple boxes whose comments you want to change. Then follows steps 2 through 4 as for the Mass Change Clients Utility, selecting Change Comments on instead of Change Client. Note if you want to add onto to a set of comments, copy the original comments to the clipboard and then type the additional information into the dialogue window.

## Mass Change Locations

This utility is used to change the location code of a group of boxes. It can operate on either a list, or on a group of boxes. In the Maintain Boxes screen, select multiple boxes whose location you want to change. Then follows steps 2 through 4 as for the Mass Change Clients Utility, selecting Change Location instead of Change Client.

## Recall Destroyed/ Permed Out Items

The Recall Deleted Items utility is used to recall boxes that have been marked as destroyed or permanently removed from the center; as for example, if they were marked in error. It can operate on either a list, or on a group of boxes.

In the Maintain Boxes screen, select the boxes you want to recall. The recall process is simpler when you work with a list - one reason why, when destroying or permanently removing boxes, it is advisable to create a list. Remember that the box filter must be set to All Boxes. Right-click to bring up the action menu, and click **Recall From Destruction**. This will automatically recall the folders associated with these boxes

## Match Box Department with Folders

This utility changes the department code of all the folders in a box to match the department code of the box. It can operate on either a list, or on a group of boxes. In the Maintain Boxes screen, select the boxes you wish the folder department codes to match. Right-click to bring up the action menu, then click **Utilities>Same Department For Folders**.

## Reset Locations

The Location List file keeps track of boxes as they are stored or removed from shelves. Occasionally, this file can be out of synchronization with the Box Inventory file. Archive Manager may then think that a space is open when, in fact, it is already filled. The Reset Location Utility updates the Location List file from the Box Maintenance file, automatically correcting any mistakes.

Before running the Reset Location Utility, close all forms (especially any that are in **Edit** mode) and make sure you are the only user logged into Archive Manager. Then, from the task bar menu choose **Security > Reset Locations**. Press the **Reset Locations** button on the form to proceed.

## Defragment Database Utility

This utility cleans the database and defragments it much like you would defragment a computer hard drive. The process will improve Archive Manger's performance allowing it to operate more efficiently. We recommend running the Defragment Database Utility monthly.

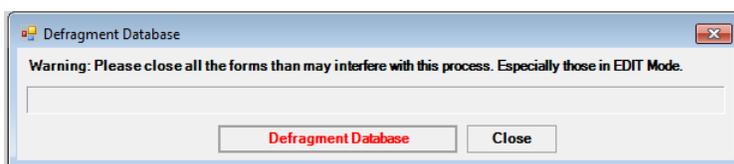


Fig.165

Before running the Defragment Database Utility, close all forms (especially any that are in **Edit** mode) and make sure you are the only user logged into Archive Manager. Then, from the task bar menu choose **Security > Defragment Database**. Press the **Defragment** button on the form to proceed.

## Mass Destroy Utility

This utility is for destroying or perming out large quantities of boxes. Note this utility requires significant server resources that it should only be run at off hours, preferably after a backup.

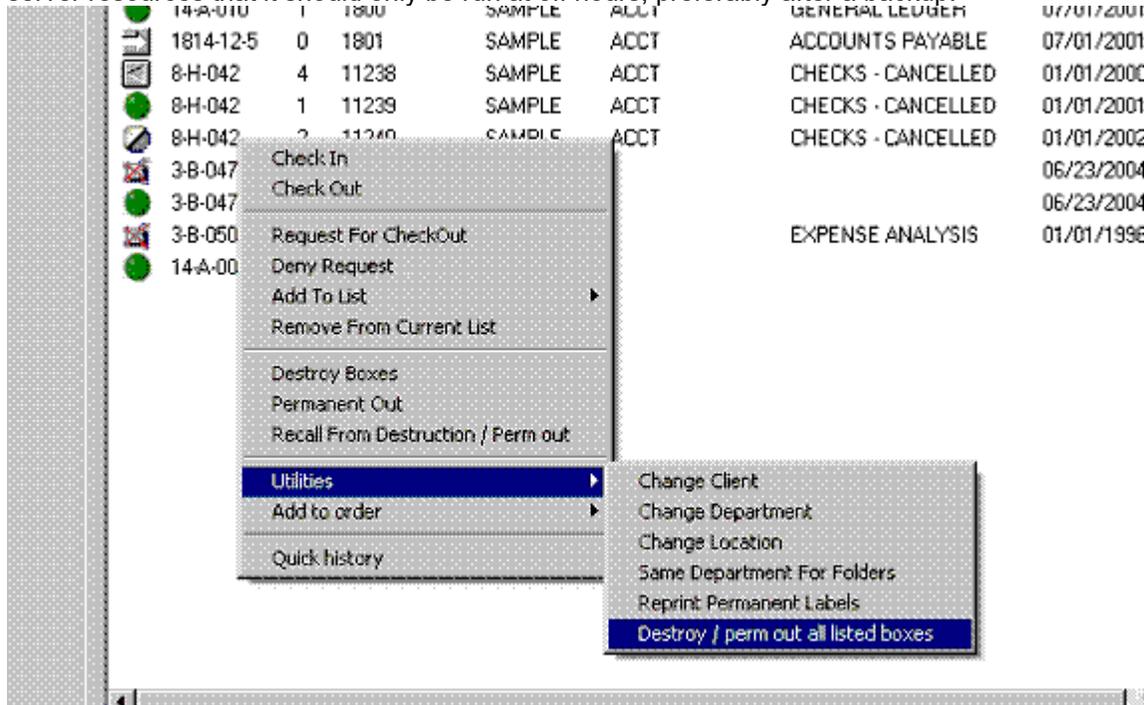
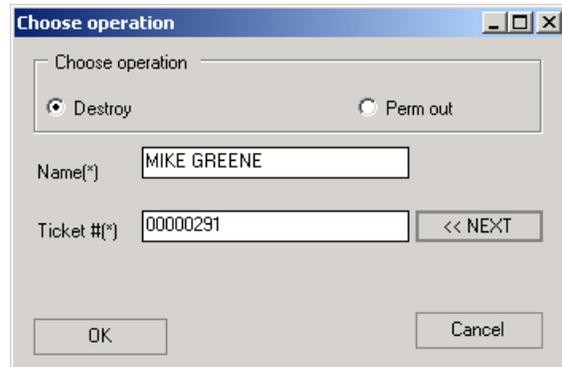


Fig. 166

After you search for some boxes and fill the maintain window, right click to Utilities > Destroy/Perm out all listed boxes. You do not have to click "Select All" or highlight the boxes.

After a confirmation message you will choose the operation, person authorizing, and ticket #.

Fig. 167



## Chapter 19 – Portable Bar Code Reader

### Overview

For technical instructions about your Portable Bar Code Reader (*right*), please consult the user manual that came with it. It will discuss charging/ changing batteries, installing the hand strap, using the rubber case provided, technical specifications, etc.

Instructions on uploading scanned data can be found in *Chapter 16 – Portable Upload*.

The current chapter will discuss use of the bar code reader for scanning with Archive Manager, and how its programming aids in managing your Clients' records.



Fig. 168

The reader has been programmed to process *new boxes coming in, boxes returning, folders being returned to their original box, moving folders from one box to another, and packing folders into a box*. The scanning for these functions can be commingled, i.e., you can scan *new boxes coming in*, and then *boxes returning*, and then go back and scan some more *new boxes coming in*, etc. You do not need to upload the reader after each process; the reader keeps the data safely organized. When it is uploaded, Archive Manager processes everything that was scanned and stores the data, maintaining the organization.

### General Operation

#### TURNING THE READER ON

**LT 5000** Turn the reader on using the **On/Off** key located in the upper left corner of the keypad. When the unit powers up, it displays **TRICODER KT5000 – HW7**. The exact message may differ from unit to unit. Press 1 for **Data Collection. Program No.? Key [0-3]?** Enter 1 for program 1.

**LT 54** Turn the reader on using the **On/Off** key located in the upper left corner of the keypad. When the unit powers up, it displays **DMA TRICODER W2017 E – HIT ANY KEY**. The exact message may differ from unit to unit, but the point is to **hit any key** to continue. It next displays **Data collection? Key [Yes/No]?** Press the Enter/ Yes key to the lower right of the keypad to enter the data collection mode. **Program No.? Key [0-3]?** Enter 1 for program 1.



**NOTE:** You will **always** use **Program 1** unless directed otherwise by Archive Manager technical support.

#### SELECTING THE PROGRAM

If there is data in the scanner from a previous session, you will automatically be returned to the prompt you were at. For example: if you turn the reader off while scanning *boxes returning* (or it turns itself off after 5 minutes idle), when you turn the unit on again you will be prompted for **Location**, or whatever field you were in. You can then either continue scanning *boxes returning* or press the **End** key located on the right side of the keypad to hear the menu choices. If the reader is not storing data (meaning previous data was uploaded) you will then be asked, **Program No.? Key [0-3]?**

## READER MENU ITEMS

Program 1 provides for functions regarding boxes and files.

### Box Menu

- New Boxes
- Check Out Boxes
- Check In Boxes
- Move Boxes

### Folder Menu

- New Folders
- Move Folders
- Box Folders
- Check In Folders
- Check Out Folders

When you are in any of these functions and wish to return to the Menu, press the **End** key on the right side of the keypad. If you want to leave the menus and turn the reader off, answer **NO** to each of the Menu items until you hear, "**Finished?**", then enter **Yes**. Or you can press the **F1** function key on the top row of the keypad, which will return you to the **Data collection? Key [Yes/No]?** display. You can then just turn the reader off.

## VOICE PROMPTING

The reader is programmed for audio. Thus, as each prompt appears in the window of the reader you will hear what you are supposed to scan. If you want to turn the voice portion OFF, proceed as follows:

1. Press SHIFT key and Release
2. Press F1 key and Release
3. Press S key and Release

If you want to turn the voice portion ON do the following:

4. Press SHIFT key and Release
5. Press F1 key and Release
6. Press V key and Release

## SCANNING A BAR CODE

To scan a bar code, point the reader at the label and squeeze the trigger or press the green bar just above the keypad (older models). For most users, resting your thumb on the bar and pressing as needed seems to be the most comfortable way of using of the reader. When the green bar is pressed, the laser beam will project from the top of the reader.



**DANGER! NEVER look into the beam!**

It may take some practice to hold the reader in the right position so that the beam hits the bar code correctly. The reader is designed so that you can look at the reader's window while scanning a bar code. This way, you can see in the window what was just scanned. You will consequently be holding the reader tilted slightly upward rather than pointing exactly at the bar code. Just be sure the laser beam extends clear across the bar code and overlaps on both sides.

## Box Menu

### NEW BOXES

When you hear, “**New boxes?**” and answer **Yes** by pressing the **Enter** Key, the reader displays **Box**, and you will hear the word, “**Box**” spoken.

#### Overview of New Box Entry Procedure

After locating a shelf onto which new boxes can be put, turn on the reader, choose Program # 1, and then go to **Data collection**.

If you already have data in the scanner, you will automatically be returned to your previous prompt, as described above.

If there is **no** data in the scanner you will be prompted to select a function, i.e., **New boxes?**, **Boxes returning?**, **Folders returning?**, **Finished?**. Choose **New boxes** by pressing the green **ENTER/YES** key.

1. **Assigned Box:** The reader first prompts you for the Assigned Box Number. Scan the Assigned Box Number bar code on the label.
2. **Client Number:** The reader next prompts you for the Client Number. Scan the client bar code on the label.
3. **Department:** The reader will next prompt you for the Department Number. Scan the Department Number bar code on the label. This field may often be empty, as not all clients will want to track their boxes by department. If empty, you can either scan the bar code or press the green **Enter** key.
4. **Location:** The reader then prompts you for the Location. Scan the bar code on the shelf onto which your first box is to be placed.

When finished scanning the Location bar code, the reader will automatically return to the Box prompt.

If you are putting more than one box onto the same shelf you can either scan the shelf label again, or you can press the **Enter** key and the reader will recall the last shelf scanned. So, if you are storing 30 boxes for the same department, you need to scan the department bar code only once. But always remember to scan a **new** department bar code when you switch to another department. NOTE: This feature works similarly in all the fields.

When finished scanning all new boxes, you can press the **End** key and you will head the next menu prompt, “**Boxes returning?**”

You can *scan new boxes* and stop – and then, without uploading, you can scan *boxes returning*, or *folders returning*.

When you are finished scanning, you can upload the reader at your convenience.

## Boxes Check out

When you hear “**Check out box?**” and answer **Yes** by pressing the **Enter** key, you will receive a visible and audible “**Box**” prompt.

### Assigned Box Number

At the **Box** prompt, the Assigned Box Number is scanned from the box label. When you are finished checking out boxes and ready to go to the Menu, press the **End** key.

### Person

This prompts you to scan or type in the name of the person to whom the box is being checked out.

## Boxes Returning

When you hear, “**Check in box?**” and answer **Yes** by pressing the **Enter** key, you will again receive a visible and audible “**Box**” prompt.

### Assigned Box

At Boxes Returning **Box** prompt, the Assigned Box Number is scanned from the box label, as above. When you are finished returning boxes and ready to go to the Menu, press the **End** key.

### Location

At this prompt, Archive Manager expects you to scan the bar code label on the shelf onto which you will be placing the first of the returned boxes.

## Move Boxes

The **Move Boxes** prompt allows you to scan boxes that are already in the database to new locations, and generates the necessary audit trail.

When you hear, “**Move box ?**” and answer **Yes**, you will receive a visible and audible “**Box**” prompt.

The **Assigned Box** and **Location** prompts function similarly to those prompts in Boxes Returning.

## Folder Menu

### NEW FOLDERS

This function is used when putting new folders into boxes. The prompts are:

- File #
- Box #
- Client
- Dept.

### MOVE FOLDERS

This function is used when putting moving existing folders into different boxes. The prompts are:

- File location
- File #

### FOLDERS RETURNING

This function is used when folders are returned to their boxes. When the bar code reader is uploaded and the scanned information processed, you will receive a report. If you have accidentally put a folder into the wrong box, the report will show this as an error. In this event, the error should be corrected immediately. The prompts are:

- Client
- Box #
- File #

There is also a routine to check in folders and verify the box. The voice prompt is “**Check in Folder Against Box**”. The prompts are:

- Client (from the folder label)
- Box # (from the folder label)
- File #

- Client (from the box label)
- Box # (from the box label)

#### CHECK OUT FOLDERS

This function is used when retrieving Folders from Boxes. The prompts are:

- File #
- Person - This prompts you to scan or type in the name of the person to whom the folder is being checked out to.

## Chapter 20 – Optional Modules

### Web Based Client Data Entry Software

Archive Manager's Web based client data entry software (*right and Appendix D*) is a package that is installed onto a web server either at your office or hosted by us. Once licensed, you have the right to grant access to Web Data Entry to as many of your clients as desired. You can even charge a fee to help offset the cost of Client Data Entry.

The Web Client Data Entry Software has options that allow clients to update the information for boxes already in your records center, and to enter folders for boxes already in your center; switches can be set in the software to turn these options on and off.

The software also prints box and folder manifests for all new items going to your record center, and there are additional reports to permit clients to edit the data they are submitting.

Updated versions of the software can be downloaded from our Web site as they become available. Please call for current pricing.

The image shows two overlapping windows of the 'Folder view' software. The background window displays a record with the following details:

- Box #: 302091
- Department: LEGAL
- Description: HARRISON LAND ACQUISITION
- Dates: From date: 04/01/2009, To date: 08/15/2009, Destroy date: 12/31/2019
- Record title: ACQUISITION
- Location: (empty)
- Cross references: Ref 1: 9108, Ref 2: AD43
- Comments: ALL PAPER WORK INCLUDING NEGOTIATIONS

The foreground window shows a 'Folder view' form with the following details:

- Box #: 302091
- Department #: LEGAL
- Folder # (1 to 999): 1
- ID: JTG
- Matter no.: 6543/43201
- Major description: HARRISON MANUFACTURING CORP
- Minor description: SITE SURVEY
- Dates: From date: 04/01/2009, To date: 08/15/2009, Destroy date: 12/31/2019
- Cross references: Ref 1: H1001, Ref 2: (empty)
- Comments: PRODUCED BY BOB SMITH OF SMITH SURVEYS

Buttons at the bottom of the foreground window include 'Save & new', 'Save', and 'Cancel'.

Fig. 169

## Web Access

The Web Access module (*Figure 170, below, and Appendix C*) allows clients to access their records via the web and to check out items any time at their convenience. This is truly indispensable for servicing large volume clients. When clients need an item, they log into your server using their Internet browser and query their box, file, or tape information. Archive Manager quickly responds, telling them either that the item is available, or that it is currently checked out, and to whom.

Appendix C, Sections 1 and 2, below, provide detailed information about use of the Web Access module.

Section 1 explains how to set up Web Access in Archive Manager at the archive storage facility.

Section 2 explains to customer how to use the Web Access module to access records and check out items via the Web.

The screenshot shows the Archive Manager Web Access interface. The browser address bar displays "50.62.123.47/AMWebAccess/Default.aspx#". The interface includes a navigation menu on the left with options like "Boxes", "Folders", "Tapes", "Supplies and Materials", and "View order". A search filter is active, showing "Boxes - STEVE / SAMPLE COMPANY". The search criteria include Description: GENERAL LEDGER, Department: ACCT, and various date and cross-reference fields. A legend indicates the status of records: green for "In the record center", red for "Checked out", and yellow for "Added to current order". Below the search criteria is a table of 29 records.

Box	Description	From	To	Department	Cross ref	Destroy	Date rec	Comments
620501	GENERAL LEDGER	04/01/2022	06/30/2022	ACCT		12/31/9998	09/26/2023	Includes audit analysis prepared by Gerte...
620500	GENERAL LEDGER	01/01/2022	03/31/2022	ACCT	G6754	12/31/9998	09/26/2023	INCLUDES BACKUP LEDGERS
620499	GENERAL LEDGER	01/01/2021	06/30/2021	ACCT	L432 M8887	12/31/2028	07/06/2022	ALL BACKUP
534213	GENERAL LEDGER	04/01/2021	06/30/2021	ACCT		06/30/2028	07/06/2022	
543120	GENERAL LEDGER	01/01/2021	03/31/2021	ACCT		03/31/2028	07/06/2022	Includes audit analysis prepared by Gerte...
843776	GENERAL LEDGER	10/01/2020	12/31/2020	ACCT		12/31/2027	06/29/2021	
843775	GENERAL LEDGER	07/01/2020	09/30/2020	ACCT		09/30/2027	06/29/2021	
843774	GENERAL LEDGER	04/01/2020	06/30/2020	ACCT		03/31/2027	06/29/2021	
843773	GENERAL LEDGER	01/01/2020	03/31/2020	ACCT	J876	03/31/2027	06/29/2021	

Fig. 170

## ***Appendix A – Field Definitions***

**Assigned Box Number:** a 9 position, numeric field containing the number assigned to a given Box. Archive Manager can automatically assign this number for manually entered Boxes. A code in the Setup file determines if each box must have a unique Assigned Box Number, or if numbers can be reused between clients (but never within a given client).

**Being Held:** a code placed into the Box and/or Folder database to indicate the items cannot be destroyed.

**Billing-State:** a 2 position alpha field in the Client Master file that contains the State portion of the billing address.

**Billing-Address 1:** a 30 position, alpha/numeric field in the Client Master file that contains the first line of the billing address.

**Billing-Address 2:** a 30 position, alpha/numeric field in the Client Master file that contains the second line of the billing address.

**Billing-City:** a 20 position, alpha/numeric field in the Client Master file that contains the City portion of their billing address.

**Billing-Contact:** a 30 position, alpha/numeric field in the Client Master file that contains the individual to whom the Invoice should be addressed.

**Billing-Invoice Number:** a number generated automatically for each invoice in the format **xxxx-y-zzzz** where the first invoice for March 2013 would be 2013-1-00001, as follows:

x is the 4 digit year,

y is the last month (1 for January, 12 for December), and

z is a 5 digit number with leading zeros (starting with 1 for each month).

**Billing-Telephone Number:** a 14 position numeric field in the Client Master file that contains their billing telephone number.

**Billing-Terms:** a 20 position, alpha/numeric field that contains the wording of the Terms. Example: "Now Due and Payable, Net 10 Days." Can be different for each client.

**Billing-Zip Code:** a 10 position numeric field in the Client Master file that contains the Zip Code portion of their billing address.

**Billing Code:** a 2 position, alpha/numeric field used to describe a particular service performed.

**Billing Description:** a 40 position, alpha/numeric field used to define each Billing Code. The information entered here will appear on the Invoice. An example would be a Billing Code for entering new boxes received. It might read 'Indexing New Boxes and Files.'

**Billing Rate:**

This is a 10 position numeric field containing 4 decimal places. It contains the rate that will be charged for a specific Billing Code. The reason for having 4 decimal position is to allow for charging a very small rate, like .002 cents per image for scanning and making microfiche.

**Box Description:** a 50 position, alpha/numeric field containing a brief description of what is in the Box.

**Box Size Code:** a 4 position, alpha/numeric field. A code placed into the Box Inventory to indicate the size of the box. The computer automatically takes this information from the Location Master File as the Box is entered into Archive Manager.

**Box Size Description:** a 30 position, alpha/numeric field describing the Box Size. Example: Standard Size Box, Transfer Case, etc.

**Client-Company Name:** a 30 position, alpha/numeric field in the Client Master file and is used to enter your client's company name.

**Client-State:** a field in the Client Master file that contains the State portion of their address.

**Client-Address 1:** a 30 position, alpha/numeric field in the Client Master file that contains the first line of their business address.

**Client-Address 2:** a 30 position, alpha/numeric field in the Client Master file that contains the second line of their business address.

**Client-Attention Of:** a 30 position, alpha/numeric field in the Client Master file that contains the individual to whom the Invoice should be addressed.

**Client-Billing Rate:** a 10 position numeric field containing 4 decimal places. It contains the rate this client will be charged for a specific Billing Code. The reason for having 4 decimal position is to allow for charging a very small rate, like .002 cents per image for scanning and making microfiche.

**Client-Billing Representative:** a 20 position, alpha/numeric field that contains the name of the individual in your company the client should call if they have any questions regarding the Invoice.

**Client-Canada GST tax:** a coded field that tells the computer you need to calculate, invoice and collect the Goods and Services Tax for your client in Canada.

**Client-City:** a 20 position, alpha/numeric field in the Client Master file that contains the City portion of their address.

**Client-Department Indicator:** a coded field that tells the computer if the client wants to track their Box Inventory at the Department level.

**Client-Exempt Code:** a coded field that tells the computer this client is exempt from sales tax. Even though you may engage in a taxable transaction (sell new Boxes as an example) sales tax will NOT be added to this charge.

**Client-Minimum Storage:** a 6 position numeric field used to record what, if any, minimum storage fee should be applied to this client. This can be different for each client.

**Client-Number:** a 10 position, alpha/numeric field containing the number assigned to each client.

**Client-Storage Indicator:** a coded field that tells the computer what billing cycle the client is on - monthly, quarterly, or annually.

**Client-Telephone Number:** a 14 position numeric field in the Client Master file that contains their Business telephone number.

**Client-Type Billing:** a coded field that tells the computer whether the client is paying per cubic foot or per box.

**Client-Zip Code:** a 9 position, alpha field in the Client Master file that contains the Zip Code portion of their address.

**Contract Number:** a 10 position, alpha/numeric field used to enter the client's contract or purchase order. This information is printed on the Invoice.

**Contract Begins:** a date field used to record the beginning date of the contract. This information is only used if the client is being billed annually for storage. If they are paying annually, Archive Manager looks at the month portion of this date to determine when to include next year's storage on their invoice.

**Contract Ends:** (not currently used)

**Cost Per Box:** a 10 position numeric field containing 4 decimal places. It contains the rate that will be charged for a specific size box.

**Cross Reference:** a 15 position, alpha/numeric field into which you can enter your client's box number.

**Cubic Feet:** a 9 position numeric field containing 4 decimal places indicating the number of cubic feet a specific size box contains.

**Date In:** a date field used to record the date a Box or Folder is Returned.

**Date Out:** a date field used to record the date a Box or Folder is checked Out.

**Date Received:** a date field; only valid dates can be entered. Used to record the date the Box or Folder was received into your records center. Also used when calculating prorated current month storage.

**Department Number:** a 10 position, alpha/numeric field containing the number assigned to each clients department. When setting up the client Master you need to indicate the department number is required. And you must also enter each valid department for this client in the client Department Master File.

**Destroy Date:** a date field used to describe the month, day, and year the Box can be destroyed. Supplied by the client or the computer will automatically put 12/31/9998 into the field.

**Duplicate Box Number:** a code in the Setup file that is used to indicate how you want to validate each Box Number. One option will check each Assigned Box Number and will NOT allow any two boxes to exist with the same number. Another option allows for two or more boxes to have the exact box number but each of those boxes must belong to a different client. In other words, no client can have the same two box numbers.

**Folder Number:** a 4 position numeric field used to identify each Folder in a Box. This number is automatically entered by Archive Manager at the time Folders are entered. The can be a maximum of 9999 Folders in any one Box.

**From Date:** a date field, only valid dates can be entered. Used to describe the beginning range of dated information in a given Box or Folder.

**ID Number:** a 5 position, alpha/numeric field used to record an addition piece of information about a Folder. Example: A law firm may use this to record the initials of the attorney responsible for this case, i.e., DBC

**Location:** an 11 position, alpha/numeric field used to describe each shelf in the records center.

**Major Description:** a 50 position, alpha/numeric field used to describe information about a Folder. Example: A law firm might use this field to describe their client, SMITH vs. JOHNSON.

**Matter Number:** a 13 position, alpha/numeric field used to describe additional information about a Folder. Example: A law firm may use this to record the Case Number, i.e., ABC1234

**Media Code:** a 3 position, alpha/numeric field used to identify what is in each Box. If used, you need to enter all of the valid Media Codes into the Media Code Master File.

**Minor Description:** a 50 position, alpha/numeric field used to describe more information about a Folder.

Example: A law firm may use this field to indicate a brief description of the case, i.e., REAL ESTATE CLOSING.

**Password:** a 15 position, alpha/numeric field used to enter information known only to the individual to whom it has been assigned and is used to gain access to the software.

**Prorate:** a code used to indicate when the charges for a specific Billing Code will be calculated from the date received until the end of the month.

Purchase Order Number a 10 position, alphanumeric field used to enter the client's contract or purchase order. This information is printed on the Invoice.

**Quantity:** 10 position numeric field with 2 decimal positions. It is used to record the number of services performed for a given work order/billing code. Example: If you are charging the client for picking up 25 Boxes the "quantity" would be 25.

**Record Title Code:** a 10 position, alphanumeric field containing information supplied by your client about a series of boxes.

**Return By:** a date field used to record the date a Box or Folder is to be Returned.

**Sales Tax Indicator:** a code used to indicate when a specific Billing Code is subject to sales tax.

**Space on Shelf:** a 2 position numeric field used to record the actual space on the shelf. In most cases it is automatically assigned by the computer as the bar code reader is uploaded.

**Save Location:** a code in the Setup file that is used to indicate if you are Reserving the space when a Box is checked out or if you are operating in a Random method.

**Setup Account:** The income account that charges will be transferred to in QuickBooks.

**Tax Rate:** The sales tax rate charged to a specific customer expressed in decimals. For example 6.5% would be entered as .065.

**Ticket Date:** a date field and is used to indicate the date of the service on a given ticket or work order.

**Ticket Number:** 6 position, alpha/numeric field used to record a Work Order relating to a specific charge.

**To Date:** a date field; only valid dates can be entered. Used to describe the ending range of dated information in a given Box or Folder.

**Unit of Measure:** a 6 position, alphanumeric field used to give meaning to the service being performed. It is entered into the Master Billing Code file and automatically placed onto any screen where Charges are involved. An example would be a Billing Code used to charge for data entry services at 35.00 per hour. The Unit of Measure in this case is 'Hours'.

**User ID :** a 10 position, alphanumeric field used to enter information known only to the individual to whom it has been assigned and is used to gain access to the software.

**Work Order:** See ticket #- 6 position, alpha/numeric field used to record a Work Order relating to a specific charge.

**WWW:** Your web address URL.

**Your Address:** a 30 position, alphanumeric field in the Setup file that contains the first line of your business address.

**Your City:** a 30 position, alphanumeric field in the Setup file that contains the City portion of your address. This information appears on the bottom of each report.

**Your Name:** a 30 position, alphanumeric field in the Setup file that contains your Name. This is the name that appears on the bottom of each report.

**Your State:** a 2 position alpha field in the Setup file that contains the State portion of your address. This information appears on the bottom of each report.

**Your Telephone Number:** a 14 position numeric field in the Setup file that contains your Business telephone number.

**Your Zip Code:** a 10 position numeric field in the Setup file that contains the Zip Code portion of your address.

## *Appendix B – Portable Codes*

**KEY:** REQ = required field    IMP = field that can be imported from the previous operation

### **Boxes**

#### **Boxes returning:**

BI-B - Box# - REQ

L - Location Code - (if missing, return to the same Location)

#### **Boxes checkout:**

BO-B - Box# - REQ

P - REQ, IMP

#### **Move box to a new location:**

BM-B-Box# - REQ

L - Location Code - REQ, IMP

#### **New Boxes:**

BN - B-Box# - REQ

C - Client Code - REQ, IMP

D - Dept Code - IMP

L - Location Code - REQ, IMP

#### **New Boxes with cross reference:**

BN - B-Box# - REQ

C - Client Code - REQ, IMP

A – Cross Reference - REQ

L - Location Code - REQ, IMP

### **Folders**

#### **Folders Returning:**

FI- C- Client- REQ -IMP

B - Box# - REQ, IMP

F - Folder Number - REQ

In our current implementation, you can return a folder only to the box from which it was taken (box identification is a part of folder identification. If a folder is returned to a different box, Archive Manager can not track it and there will be no Audit Trail. You must make absolutely certain that the destination box belongs to the same client as the folder, since folders are identified by their boxes.

#### **Folders Check Out:**

FO - B-Box# - REQ

F - Folder# - REQ, IMP

P - person

**Folders Move:**

FB-O - OldBox#

F- folder#

N - New box #

P - Person REQ, IMP

This operation moves a folder from one box to another one owned by the same client. You must make absolutely certain that the destination box belongs to the same client as the folder, since folders are identified by their boxes.

**New Folders:**

FN-F – Folder#

B - Box#

C - Client Code - REQ, IMP

D - Department Code - IMP

L - Location Code - REQ, IMP

**Tapes**

**Tapes Returning:**

TI- C- Client- REQ -IMP

B - Box# - IMP

T - Tape Number - REQ

**Tape Check Out:**

TO - B-Box# - REQ (only for boxed tapes)

T - Tape# - REQ, IMP

P - Person

**Tapes Move:**

TL-T - Tape#

L - Location Code - REQ, IMP

**New Tape:**

TN-T – Tape#

B - Box#

C - Client Code - REQ, IMP

D - Department Code - IMP

L - Location Code - REQ, IMP

## Appendix C – The Web Access Module

### Section 1 – Record Center Instructions

#### TECHNICAL REQUIREMENTS

The Web access module runs on a Windows 2016 server or higher, and requires a static IP address.

To host the module you can use either your own in-house server, or a commercial web hosting service.



**NOTE:** *If you plan to plan to host the Web Access Module privately, note that IIS 7.5 is deployed with a static IP address. Please call for technical assistance and pricing.*

If you are hosting the Web Access Module privately, after it is installed at your server, have your Web administrator add a link to your Login URL on your home page. When your customers are ready to use the Web Access Module, they can simply click the link to access the Login page, enter their username and password, then click **Login**.

#### SETTING UP THE WEB ACCESS MODULE IN ARCHIVE MANAGER

If a Contact has previously been set up for the customer in question, the Web Access Module uses the contact's existing user name and password and no further setup is required (*see The Contact Screen, Page 19*). Otherwise, simply create a contact for the customer, with a user and password. The procedure you use will depend on whether departments have been set up for the particular customer in the Maintain Clients screen.

- Customers without departments: refer to Page 19, *The Contact Screen*.
- Customers with departments: refer to Page 21, *The Department Contact Screen*.

At the Maintain Clients screen, select a client and click **Edit**, or else double-click the client to view the client entry in the Current Client screen.

When users at non-departmentalized customer sites request items for check out, Archive Manager will use the customer's main address for the delivery ticket.

Once your customer's contacts have a user name and password, all they need is their web browser to log in. They will typically go to an address that you will provide, like [http://your\\_ip/AMWebAccess/Login.aspx](http://your_ip/AMWebAccess/Login.aspx), to log in.

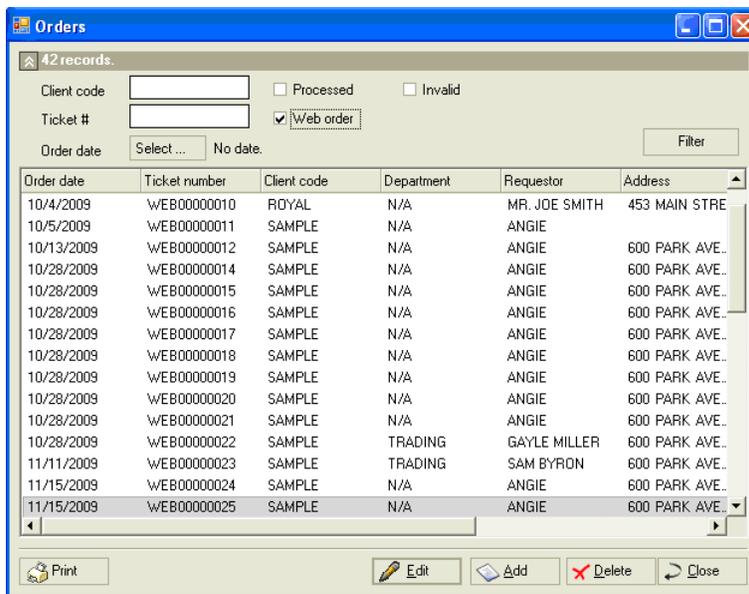
## WEB ACCESS RETRIEVALS

You will be notified in several ways that a new Web access order is pending:

- an email will be sent to your account from your SMTP server, and
- a message will pop up in the lower right-hand corner of your screen, or
- a message will appear in the message box above the maintain menu.

After receiving notice that a new Web Access was received, go to Maintain Orders (*Chapter 11*) and filter on the ticket number given in the notification. For a Web Access order, this number always begins with “WEB”, so it would be practical to click the filter labeled “Web order”.

Fig. 171



Just process the order as you normally do per Chapter 11. This will allow you to charge for the order and print your delivery ticket and pull list.

### Setting Up “Supplies & Materials” for the Maintain Orders Module

The Web Access module includes a **Supplies & Materials** list that is populated from your master billing codes. See Billing Codes in Chapter 2 Getting Started. While you are setting up Web Access, you should select the items your clients will see on the **Supplies & Materials** list.

To do this, proceed as follows:

1. Log into Web Access using the admin password supplied by Record Management Software. The Billing Code Menu icon appears.

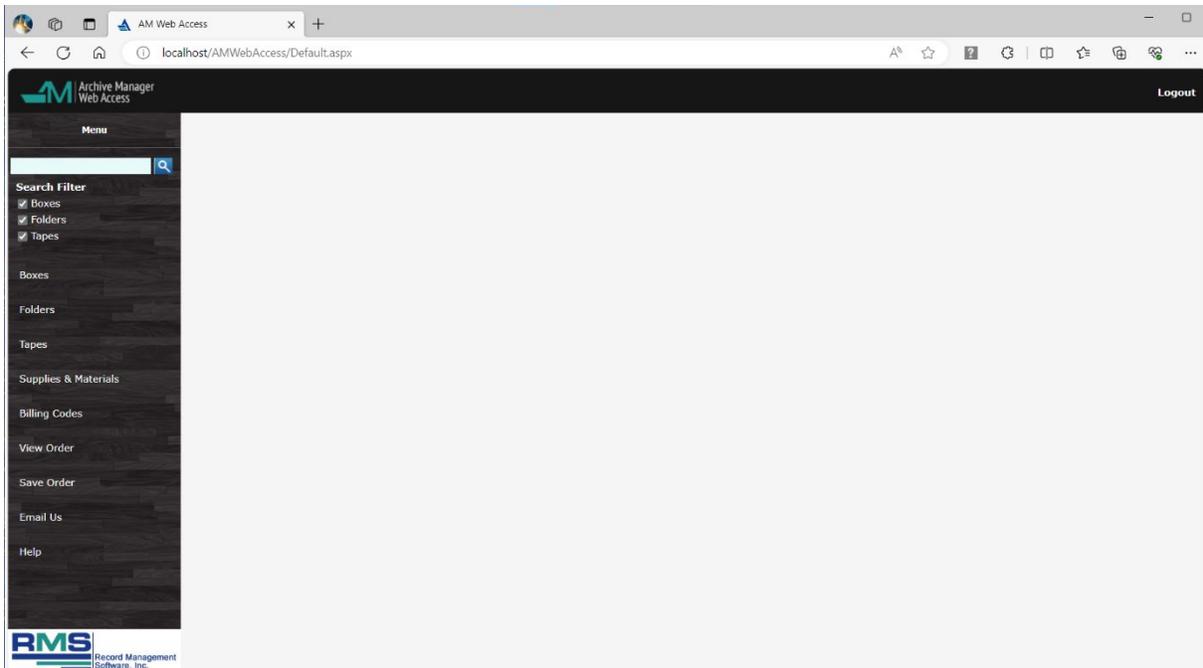


Fig. 172

2. Select Billing Codes List; the Choose Billing Codes screen appears.

In the list of billing codes, click on the items that you want to appear on the pull down list for your client.

Selected items appear with a green check; unselected items appear with a red check.

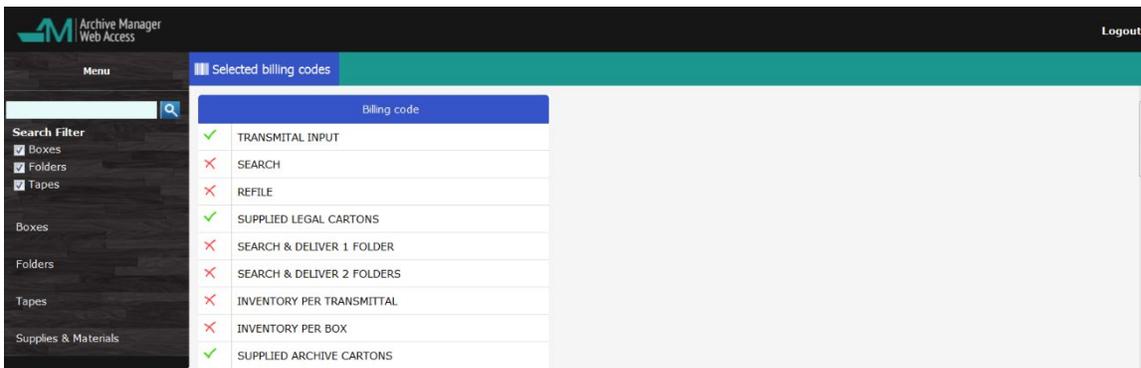


Fig. 173

Your clients will now see the selection you created when they order supplies and materials using Web Access.

The supplies and materials will appear in the Web order on the Non Item Billing Codes tab.

## Section 2 – End 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

RMS Record Management Software, Inc.

RMS ARCHIVES, INC

Your time is: Monday 5<sup>th</sup> February 2024 -- 10:47

rsmith

.....

Remember Me

Login

Version 4.0.0.2

Fig. 174

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.

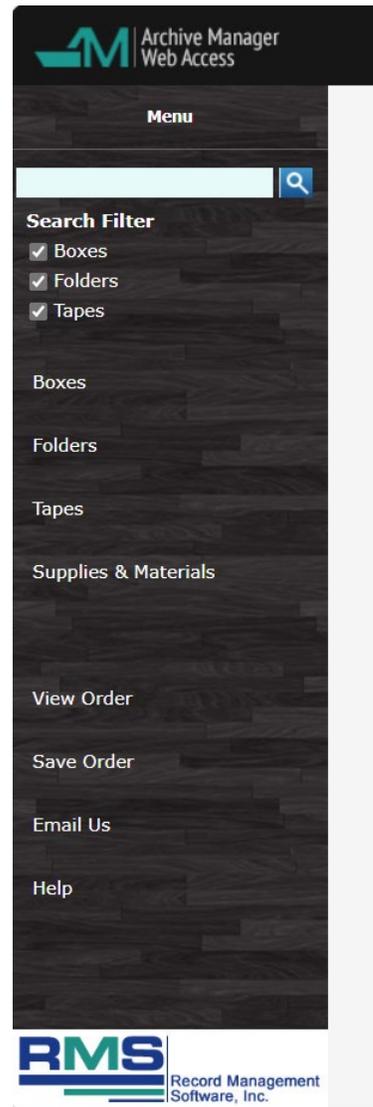
Simply enter the User Name and Password, and click **Login**.

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

- Super search filter (Contents)
- Boxes
- Folders
- Tapes

- Supplies & Materials
- View Order
- Save Order
- Email Us
- Help (User Guide)

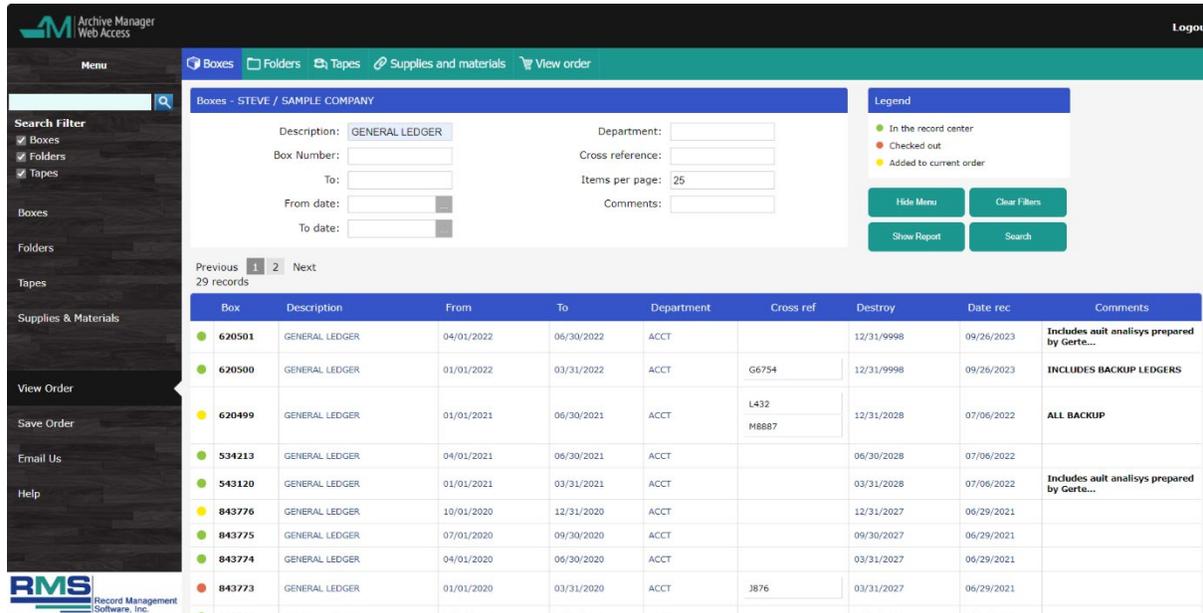
Fig. 175



## 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.

Fig. 176

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 various categories, which can be used in conjunction:

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

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 "2019 or 2020 Sterling Closing", and couldn't remember exactly whether the closing occurred in 2019 or 2020, you could enter "% Sterling Closing" to display all existing possibilities. For the Comments filter, the wildcard is automatically applied.

July, 2021							
«	<	Today				>	»
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
26				1	2	3	4
27	5	6	7	8	9	10	11
28	12	13	14	15	16	17	18
29	19	20	21	22	23	24	25
30	26	27	28	29	30	31	

Select date

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 or the comments text to see the complete data.

### 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.

Boxes - JULIE GREENE / SAMPLE COMPANY

Description:  Department:

Box Number:  Cross reference:

To:  Items per page:

From date:  To date:

Previous **1** Next  
19 records

Box	Description	F	cross ref
● 620116	GENERAL LEDGER	01	
● 620117	GENERAL LEDGER	03	
● 620118	GENERAL LEDGER	07	
● 620119	GENERAL LEDGER	10/01/2009	12/31/2009 ACCT
● 843606	GENERAL LEDGER	01/01/2003	03/31/2003 ACCT SA764 6654
● 843607	GENERAL LEDGER	04/01/2003	06/30/2003 ACCT SA762

**Checked out**  
To: GREG  
Checkout date: 11/14/2017

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.

Fig.177

## Reports

### Boxes report

Box number	Description	From date	To date	Department	Cross reference	Destroy date	Received date
843757	GENERAL LEDGER	01/01/2016	03/31/2016	ACCT		03/31/2023	05/14/2017
843761	GENERAL LEDGER	01/01/2016	03/31/2016	ACCT		03/31/2023	11/14/2017
843762	GENERAL LEDGER	04/01/2016	04/30/2016	ACCT		04/30/2023	11/14/2017
843758	GENERAL LEDGER	04/01/2016	06/30/2016	ACCT		03/31/2023	05/14/2017
843759	GENERAL LEDGER	07/01/2016	09/30/2016	ACCT		03/31/2023	05/14/2017
843763	GENERAL LEDGER	07/01/2016	09/30/2016	ACCT		09/30/2023	11/14/2017
843760	GENERAL LEDGER	10/01/2016	12/31/2016	ACCT		03/31/2023	05/14/2017
843773	GENERAL LEDGER	01/01/2020	03/31/2020	ACCT	J876	03/31/2027	06/29/2021
843774	GENERAL LEDGER	04/01/2020	06/30/2020	ACCT		03/31/2027	06/29/2021
843775	GENERAL LEDGER	07/01/2020	09/30/2020	ACCT		09/30/2027	06/29/2021
843776	GENERAL LEDGER	10/01/2020	12/31/2020	ACCT		12/31/2027	06/29/2021

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. *Fig 178*

## FOLDERS

The screenshot shows the 'Folders' screen in the Archive Manager Web Access interface. The main area displays a search filter for 'JULIE GREENE / SAMPLE COMPANY'. The search filter includes fields for Major desc, Folder no, To, Minor desc, Matter no, and Box number. The Department is set to 'ACCT'. The Cross reference is 'J876'. The Items per page is set to 25. The ID and Comments fields are empty. The legend on the right shows the following options: In the record center, Checked out, In a checked out box, and Added to current order. Below the search filter is a table with 46 records. The table has the following columns: Box #, Folder #, Department, Major description, Minor description, Matter no, From, To, Cross ref, ID, and Comments. The table lists various folders with their respective descriptions and dates.

Box #	Folder #	Department	Major description	Minor description	Matter no	From	To	Cross ref	ID	Comments
428	1	ACCT	WILLIMSON SPECIAL PROJECT			07/01/2002	12/31/2002			
473	1	ACCT	APPLEGATE - MILLER			01/01/2001	06/30/2001			
5011	8	ACCT	TEST			09/08/2004	10/08/2004			
11238	1	ACCT	RANDOLPH ELECTRIC	PAID BILLS	123-568	01/01/2000	12/31/2000		GFD	Includes all purchase orders and bills o...
11238	2	ACCT	LYNCHBURG FUEL	PAID BILLS	123-568	01/01/2000	12/31/2000		GFD	Includes all purchase orders and bills o...
11238	3	ACCT	KENSINGTON OIL	PAID BILLS	123-568	01/01/2000	12/31/2000		GFD	Includes all purchase orders and bills o...
234103	1	ACCT	STATEMENTS AND CONFIRMS A-F			01/01/1994	12/31/1994			
234103	2	ACCT	SATTYS TO SULLIVAN			01/01/1993	12/31/1993			
418049	0	ACCT	SALESMEN RECEIPTS	VOUCHERS		01/01/2002	06/30/2002		DDD	

*Fig. 179*

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
- Comments

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 wildcard, except the Comments filter, where the wildcard is automatically applied.

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 folder 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 or the comments text to see the complete data.

## 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 left of the screen. To print all items, leave the filters blank.

## TAPES

Box#	Tape#	Department	Major description	Minor description	Matter no	From	To	Type	Cross ref	Comments
open shelf	401	ACCT	MONTHLY BACKUP			01/01/2007	01/31/2007			
open shelf	405	ACCT	MONTHLY BACKUP			02/01/2009	02/28/2009			
open shelf	406	ACCT	MONTHLY BACKUP			03/01/2009	03/31/2009			
open shelf	402	ACCT	MONTHLY BACKUP			02/01/2015	02/28/2015			
open shelf	403	ACCT	MONTHLY BACKUP			03/01/2015	03/31/2015			
open shelf	423	ACCT	MONTHLY BACKUP			01/01/2016	01/31/2016	MT		
open shelf	424	ACCT	MONTHLY BACKUP			02/01/2016	02/29/2016			
open shelf	441	ACCT	MONTHLY BACKUP			01/01/2017	01/31/2017	MT		
open shelf	442	ACCT	MONTHLY BACKUP			02/01/2017	02/28/2017			
open shelf	443	ACCT	MONTHLY BACKUP			03/01/2017	03/31/2017			
open shelf	456	ACCT	MONTHLY BACKUP			01/01/2017	01/31/2017			
open shelf	457	ACCT	MONTHLY BACKUP			01/01/2017	01/31/2017			

*Fig. 180*

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
- Tape type
- Cross Reference
- Department
- Comments

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 wildcard, except the Comments filter, where the wildcard is automatically applied.

### 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 tape 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 or the comments text to see the complete data.

## 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 left of the screen. To print all items, leave the filters blank.

## SUPER SEARCH FILTER

Filling in text in the field labeled Search Filter, allows you to search all modules at once. If not already open, the tabs for boxes, folders, and tapes will automatically open and search for any matching characters within:

### Boxes

- Box Description
- Comments

### Folders

- Major Description
- Minor Description
- Comments

### Tapes

- Major Description
- Minor Description
- Comments



**NOTE:** *The Super Search Filter requires that you enter the text from its beginning. If you are searching for part of a text, use the wildcard key %. The wildcard character is %, meaning “accept any value”. It may be used in any part of a query. It may be used with any of the text filters as a key word search. The comments field does not require a wildcard and will search for any embedded text string. For example %JONES in a description finds all files with the phrase JONES such as SUSAN JONES or SMITH and JONES.*

After entering text to search for, click the magnifying glass symbol. You will then have the results page. You can then click on the boxes, folders, and/ or tapes tabs to see the actual data found.

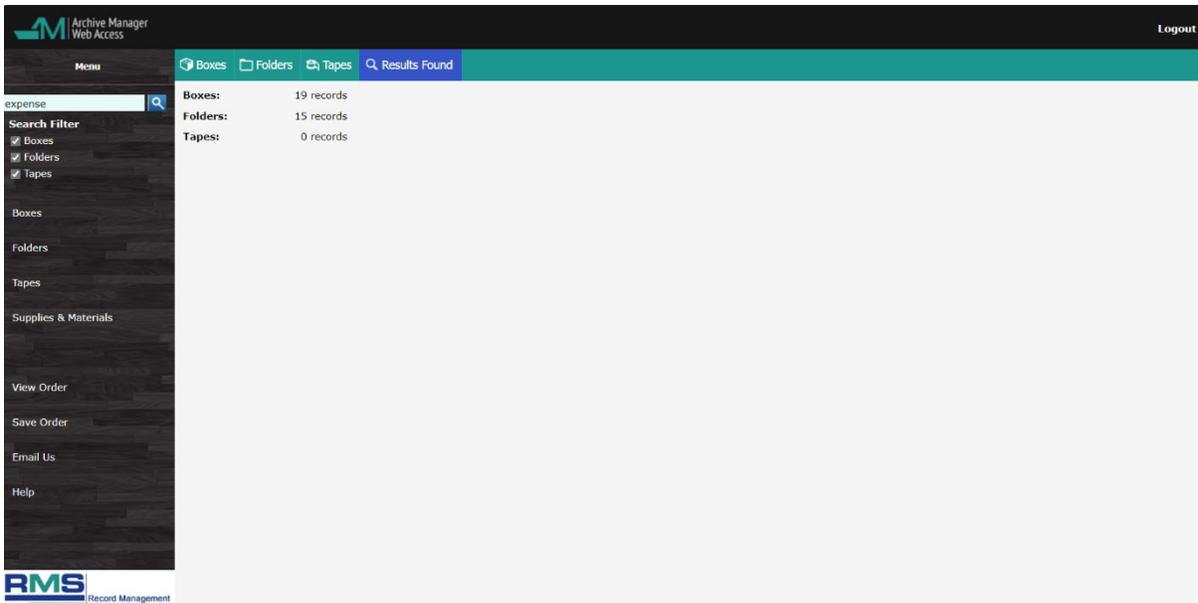


Fig. 181

## 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.

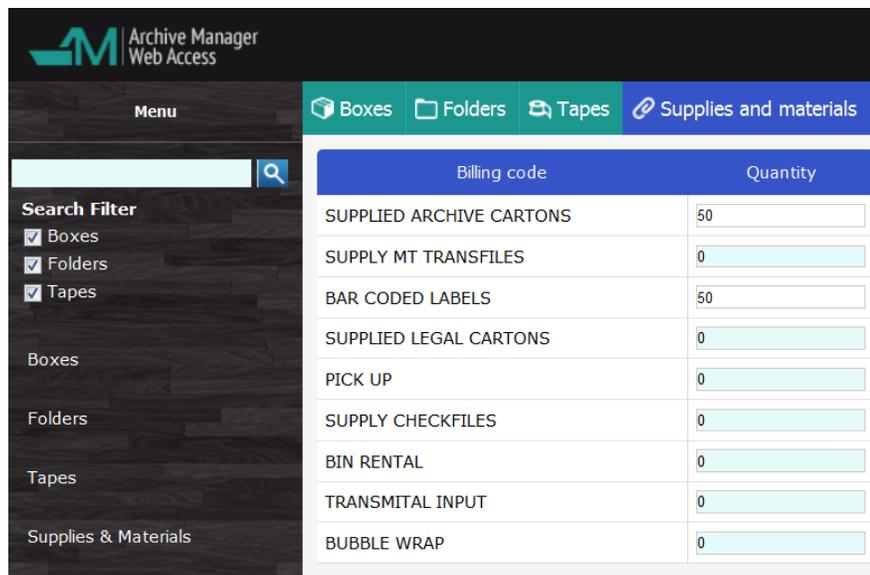


Fig. 182

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.

**NOTE:** The administrator setup procedure for this feature is discussed in Section 1 of this Appendix.

## THE VIEW ORDER SCREEN

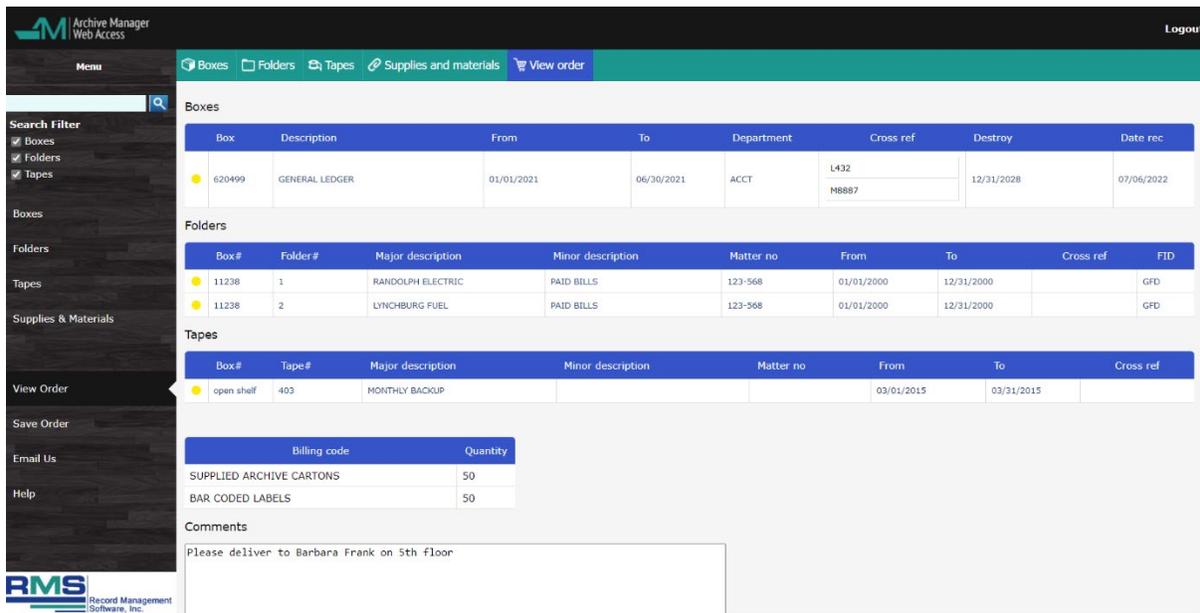


Fig. 183

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. Then there is a section for the supplies and materials ordered.

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.

Click the **Print order** icon to print a copy of the order for your records.

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

### 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.

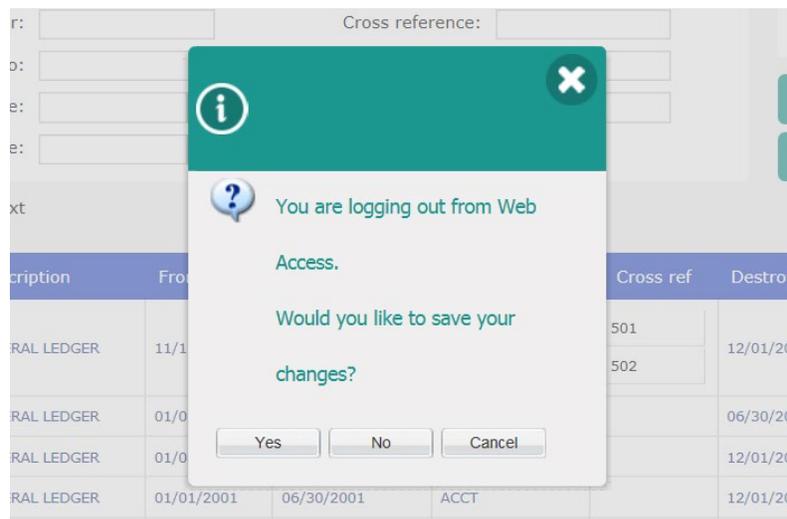
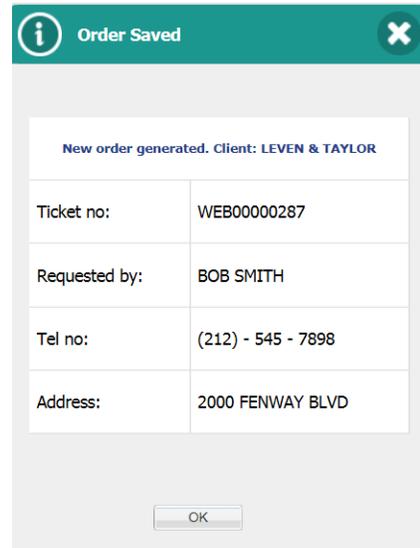


Fig.184

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.

Fig. 185



**Subject:** Message from the records center

Dear BOB SMITH,

This is a confirmation message from AM Web Access

Your order has been received.

Please do not reply to this message

Thank you,  
RMS ARCHIVES

---

New order from LEVEN & TAYLOR

Ticket no: WEB00003081  
Requested by: BOB SMITH  
Tel no: N/A  
Address: 2000 FENWAY BLVD

#### EMAIL US

Clicking on the Email Us opens a new message from your default email client like Outlook or Windows Mail. This automatically inserts the proper address to the record center and includes your client name in the subject line. You can then type your remarks.

#### HELP

Clicking on Help brings up the User Manual.

#### LOGGING OUT

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

# Appendix D – The Web Data Entry Module

## Section 1 – Record Center Instructions

### TECHNICAL REQUIREMENTS

There are two possible ways to deploy the Web Data Entry Module. The module can be hosted using either:

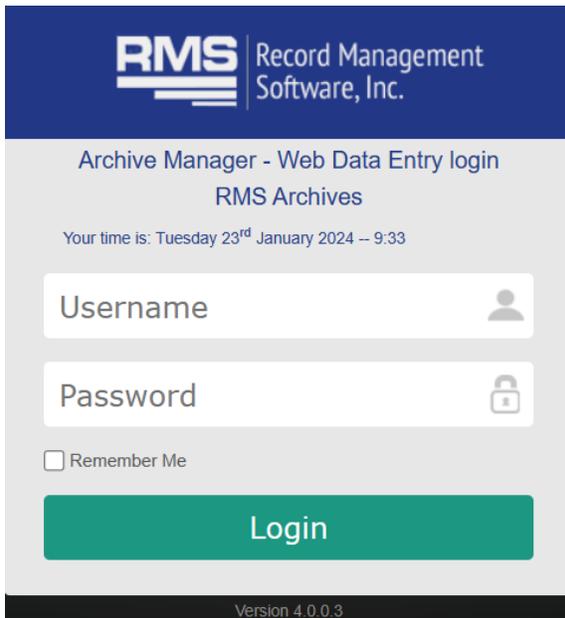
- your company’s in-house server (a fixed IP address is required), or
- a commercial web hosting service.



**NOTE:** *If you plan to plan to host the Web Access Module privately, note that Windows 2016 Server or higher and a static IP address are required with IIS 7.5 deployed. Please call for technical assistance and pricing.*

If you are hosting the *Web Data Entry Module* privately, after it is installed at your server, have your Web administrator add a link to your Login URL on your home page. When your customers are ready to use the Web Data Entry Module, they can simply click the link to access the Login page, enter their username and password, then click **Login**.

### SETTING UP USERS



Since each client will need its own data batch set, a user name and password is required for each employee who will use the system.

Go to the designated URL typically <http://ip/WebDtaEntry/default.aspx> and log in at the Web Data Entry Login screen. Enter User Name = admin and the password.

Fig. 186

## THE WEB DATA ENTRY ADMINISTRATION SCREEN

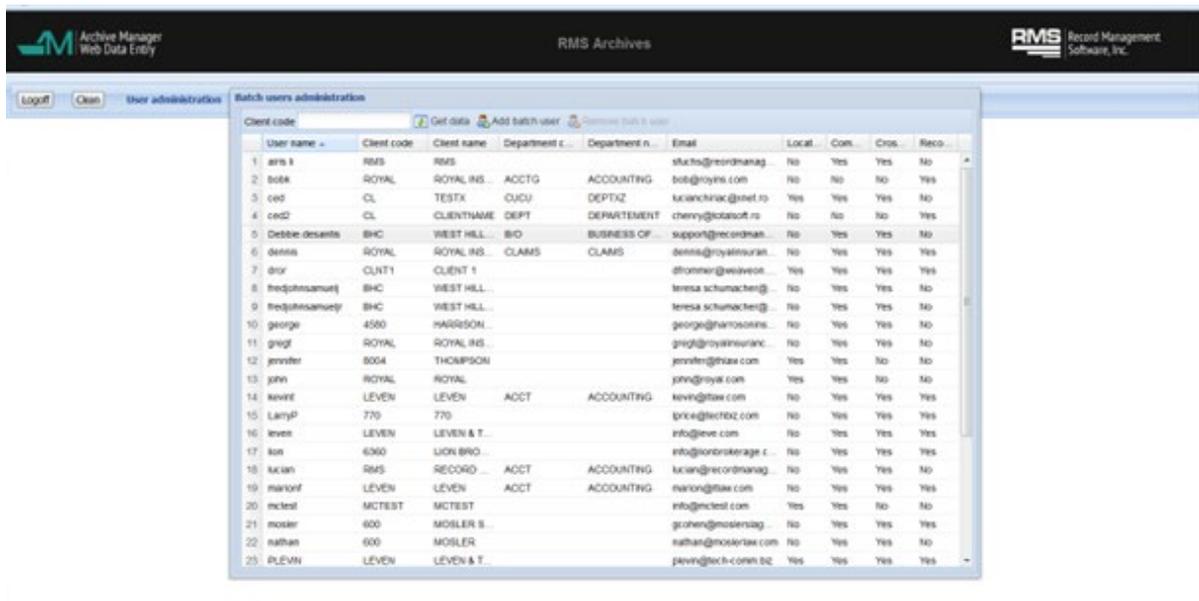


Fig.187

After you log in, the Web Data Entry Administration screen appears (above).

You can sort on any column by clicking its heading. There is a filter for Client code. To edit an existing user, double click any user. To delete a user, highlight the use and click Remove Batch User at the top of the form.

## THE EDIT USER SCREEN

To add a new user, click the **Add Batch User** at the top of the list.

Fig. 188

Fields with a red \* are required.

- \*Username – Note that each client may have multiple users.
- \*Password – May be changed at any time.
- \*Client code – This entry must match the Client Code set up in Archive Manager.
- \*Client name – Your entry here populates the Client Name field at the top of the Box and Folder Entry screens.
- Department Code – This entry must match the Department Code set up in Archive Manager.
- Department Name – if entered in password setup will appear in the Box and Folder screens.
- \*Email – Enter the user's email address.

**NOTE:** Any user who is limited to a single department in Archive Manager will only be able to enter items for that department.

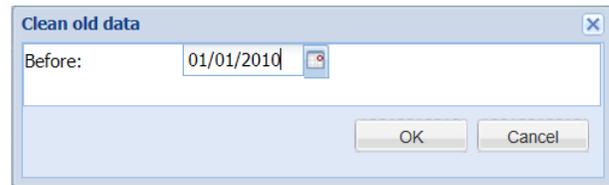
User options – Use the check boxes to permit users to:

- enter locations (typically unchecked, since boxes are scanned the as they arrive)
- enter Comments
- enter Cross References
- enter Record Titles

When finished entering information, click **Save** or **Save & New**. You can then log off.

## THE CLEAN DATA FUNCTION

This function allows you to delete all data from the Archive Manager Web Data Entry database before a certain date. Only batches sent will be deleted. Click the Clean button in the upper left and enter the date of older data to delete. *Fig. 190*



You will receive a warning and a confirmation.

## FINALIZATION AND IMPORT

When your client has finished doing all their data entry, they click **Send to Record Center**. This finalizes the batch, transmits the information to the record center via email, and removes the batch from the Existing Batches (and Batch Content) screen.

**Subject:** AM Web Email - AM exported data from: 600

**To:** [orders@RMSArchives.com](mailto:orders@RMSArchives.com)

New batch from MOSLER . Batch Id: 345

The batch is marked as sent and appears in the Web Data Entry tab of Import/ Export in Archive Manager.

The batch data can be imported into Archive Manager using the instructions provided in Chapter 17 of this manual, *Import/Export of Client Data*. The email address for the record center is part of the set up procedure

## Section 2 – End User Instructions

### WELCOME TO THE ARCHIVE MANAGER WEB DATA ENTRY MODULE!

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

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

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

### OBTAIN A USER NAME AND PASSWORD

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



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

### Optional authority for users

In addition, users may be granted authority to:

- enter locations (typically OFF, since boxes are scanned the as they arrive)
- enter Comments
- enter Cross References
- enter Record Titles

### LOGGING IN

**RMS** Record Management Software, Inc.

Archive Manager - Web Data Entry login  
RMS Archives

Your time is: Tuesday 23<sup>rd</sup> January 2024 -- 9:33

Username 

Password 

Remember Me

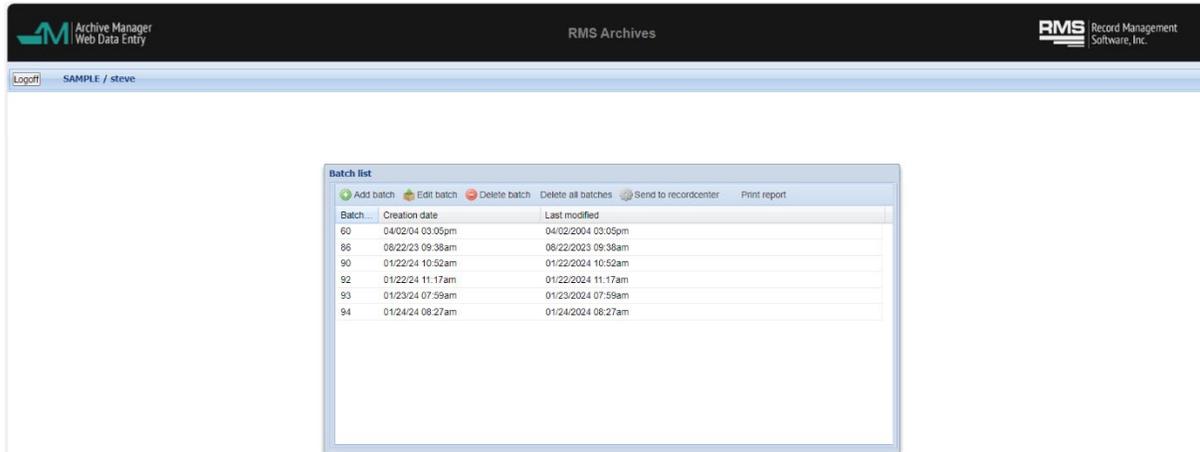
Login

Version 4.0.0.3

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

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

## THE BATCHES LIST SCREEN



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

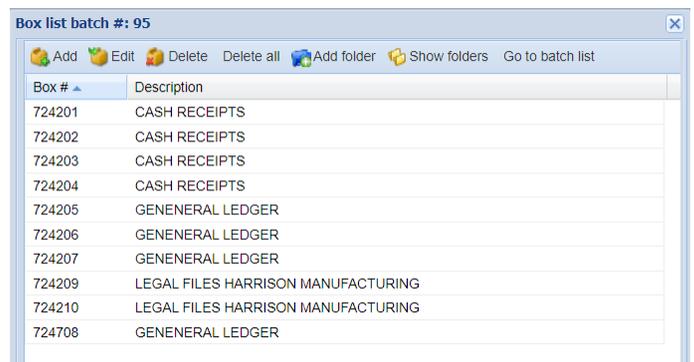
This screen displays any batches you may have started but not yet submitted.

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

## THE BOXES IN THE BATCH SCREEN

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

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



## THE EDIT BOX DETAILS SCREEN

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

The following fields are present. (Fields with a red

“ \* ” are required):

- **\* Box #** – 9 position numeric field (taken from the bar codes supplied by your record center).
- **Department** – Department Code, a 10 position alphanumeric field.
- **\* Description** – 50 character alphanumeric field for description of box contents

the To Date field to describe the time interval covered by box contents.

**NOTE:** Dates are entered in format MM/DD/YYYY, but you do not need slashes in data entry. For example, typing 051521 results in 05/15/2021.

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

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

Explanations of other buttons:

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

## THE EDIT FOLDER DETAILS SCREEN

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

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

The following fields are present. Fields with a red “\*” are required:

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

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

The screenshot shows a 'Folder view' dialog box with the following fields and values:

- Box #: 302291
- Department #: LEGAL
- Folder # (1 to 999): 1
- ID: JYG
- Matter no.: 6528-0157
- Major description: HARRISON MANUFACTURING INC.
- Minor description: SITE SURVEY
- Dates section:
  - From date: 04/01/2023
  - To date: 08/15/2023
  - Destroy date: 12/31/2033
- Cross references section:
  - Ref 1: M9763
  - Ref 2: (empty)
- Comments: PRODUCED BY EDWARD JOHNSON OF HANSEN SURVEYS

Buttons at the bottom: Save & new, Save, Cancel.

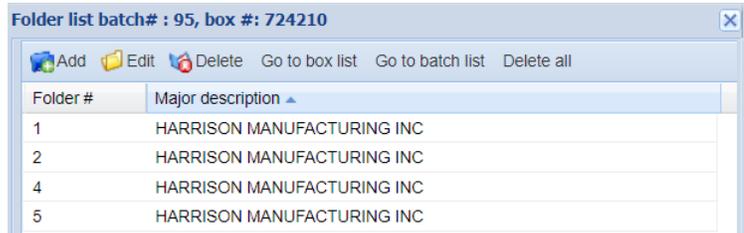
## FOLDERS IN THE BOX SCREEN

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

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

Explanations of buttons:

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



## PREVIEWING

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

Batch no: 95

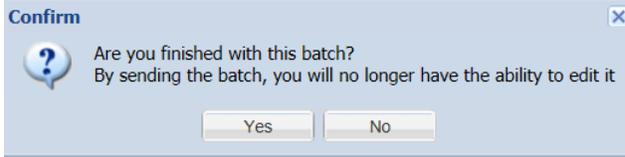
Box #	Department	Description	Record title	From date	To date	Destroy date	Ref 1	Ref 2	Location	Comments
724201	ACCT	CASH RECEIPTS	CASH	01/01/2023	03/31/2023	12/31/2028	F654433			ALL CHECK COPIES
724202	ACCT	CASH RECEIPTS	CASH	04/01/2023	06/30/2023	12/31/2028				ALL CHECK COPIES
724203	ACCT	CASH RECEIPTS	CASH	07/01/2023	09/30/2023	12/31/2028	B765			ALL CHECK COPIES
724204	ACCT	CASH RECEIPTS	CASH	10/01/2023	12/31/2023	12/31/2028	B76323			ALL CHECK COPIES
724205	ACCT	GENENERAL LEDGER	GL	10/01/2023	12/31/2023	12/31/2030	L098			INCLUDES TRIAL BALANCE
724206	ACCT	GENENERAL LEDGER	GL	01/01/2023	03/31/2023	12/31/2030	R543			INCLUDES TRIAL BALANCE
724207	ACCT	GENENERAL LEDGER	GL	04/01/2023	07/01/2023	12/31/2030				INCLUDES TRIAL BALANCE
724209	ACCT	LEGAL FILES HARRISON MANUFACTURING	ACQUISITIONS	06/01/2023	12/31/2023	12/31/2030	L0987			SEE FILES
724210	ACCT	LEGAL FILES HARRISON MANUFACTURING	ACQUISITIONS	06/01/2023	12/31/2023	12/31/2030	M0998			SEE FOLDERS
1	LAWRENCE	HARRISON MANUFACTURING INC	PUBLIC OFFERING	14759-500244	06/01/2023	12/31/2023	12/31/2030	N8766		SEC FILINGS
3	LAWRENCE	HARRISON MANUFACTURING INC	LAND BOARD MEETING	14759-500244	06/01/2023	12/31/2023	12/31/2030			PLANS AND DRWAINGS
724210	ACCT	LEGAL FILES HARRISON MANUFACTURING	ACQUISITIONS	06/01/2023	12/31/2023	12/31/2030	M0998			SEE FOLDERS
1	WATSON	HARRISON MANUFACTURING INC	LAND ACQUISTION GENEVA NY	01234-5668	06/01/2023	12/31/2023	12/31/2030	H7655		TITLE SEARCH
2	WATSON	HARRISON MANUFACTURING INC	LAND ACQUISTION TYLER PA	01234-5668	06/01/2023	12/31/2023	12/31/2030			INCLUDES DEED
4	WATSON	HARRISON MANUFACTURING INC	LAND ACQUISTION PEACHVILE GA	01234-5668	06/01/2023	12/31/2023	12/31/2030			
5	WATSON	HARRISON MANUFACTURING INC	LAND ACQUISTION EAST BAYONE NJ	01234-5668	06/01/2023	12/31/2023	12/31/2030			
724708	ACCT	GENENERAL LEDGER	GL	06/01/2023	09/30/2023	12/31/2030	K87			INCLUDES TRIAL BALANCE

Print Close

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

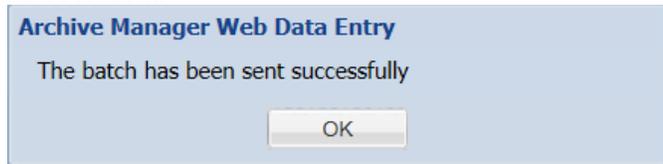
## FINALIZATION AND IMPORT

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



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

You will receive confirmation that your batch has been sent.



## LOGGING OUT

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