Total Recall™ SQL

WEB MODULE

Version 4

Records Center Training Guide

Florida State Records Center
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Table of Contents

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I N T R O D U C T I O N

The Total Recall Web Module Training Guide is organized by function so that users can refer to the table of contents and find exact instructions on the type of service they wish to request from the Records Center. Even users who only make requests once or twice a year can use the Training Guide to easily figure out how to do what they need to do.

Chapter 1, *User Access to Total Recall*, explains how to gain access to the Total Recall Web Module and is intended for new users.

Chapter 2, *Web Module Screen Components*, defines and explains the various components of the Home Page screen and the Search screens. There are three different Search screens, all used to search for items stored in the Records Center, and many of the components of these screens are similar. Users should refer to Chapter 2 if there are terms on the Search screens they do not understand.

Chapter 3, *Retrieving, Refiling, and Removing Boxes and Files*, explains the exact steps to follow when requesting a box or file for retrieval, refile, or permanent removal from the Records Center.

Chapter 4, *Searching For, Indexing, and Retrieving Files*, explains how to retrieve a file from a box when the user is not sure whether or not the file has ever been retrieved in the past.

Chapter 5, *Ordering Flat Boxes and Barcode Labels*, gives instructions on how to place an order for boxes and barcode labels to be used for new records coming to the Records Center.

Chapter 6, *Adding New Boxes to Inventory*, provides step-by-step instructions for entering box information into Total Recall to have new boxes picked up for storage in the Records Center.

Chapter 7, *Sending Your Order*, explains the process for sending orders to the Records Center. Regardless of the type of service being requested (retrieving, refiling, adding new boxes, etc.), after adding items to the current order, the user should refer to this chapter for instructions on how to send the order to the Records Center.

Chapter 8, *The User Menu Options*, explains the various options available from the User menu such as editing Delivery Sites, checking the status of orders sent to the Records Center, and viewing the current order that has not yet been sent.

Chapter 9, *The Reports Menu*, explains how to generate a report from the Total Recall Web Module.

Chapter 10, *Help*, refers the user to Records Center staff to receive help using the Web Module.

Appendix A, *Glossary of Terms*, defines terms used in the Web module and throughout the Training Guide. Users should refer to this appendix if there are terms in Total Recall they do not understand.

Appendix B, *Preparing Records for Transfer*, explains how to pack records into boxes for transfer to the Records Center, and how to label and stack the boxes for pickup.

Appendix C, *Records Storage Box Labels*, shows sample records storage box labels, which must be completed and placed on new boxes coming to the Records Center for storage.

Appendix D, *Box Information in Total Recall*, shows sample box descriptions, terms to avoid, and other relevant information which the user should consider when entering new boxes into Total Recall for storage in the Records Center. Users should refer to this appendix to understand the importance and usefulness of box descriptions.

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CHAPTER 1 – User Access to Total Recall

The Total Recall™ Web Module allows users to do business with the State Records Center via the Internet. Customers can submit work orders to retrieve, refile, and permanently withdraw their records, as well as accession new records into the Records Center.

RMLO: Records Management Liaison Officer, s. 257.36(5)(a), F.S.

*The Web Module program serves as a **remote access** to the Records Center inventory database. It is important for **RMLOs** to carefully consider access central to their agency's records inventory and set up users accordingly.*

AUTHORIZED USER: The RMLO, as an Authorized User, will be able to set up additional agency users in the Total Recall™ Web Module.

The user must log on, using a given User ID and password. Records Center staff is responsible for setting up the agency RMLO as the agency's **Authorized User**. The agency RMLO, as an Authorized User, will be able to set up additional users for the agency. The RMLO should also make sure their agency's User IDs are kept current so that an employee's user account is disabled if the employee leaves the agency.

SYSTEM REQUIREMENT: To use The Total Recall™ Web Module, the user must use Microsoft Internet Explorer version 5.5 or higher.

URL FOR THE TOTAL RECALL™ WEB MODULE: http://totalrecall.dos.state.fl.us/v4

NOTE: It is important to not share User IDs and passwords, as the system tracks actions by the user who is logged into the system.

Unauthorized users receive the following message: "**User ID or Password Invalid!**"

Once the user successfully logs in, the user will see the Home Page, which is discussed in Chapter 2.

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CHAPTER 2 – Web Module Screen Components

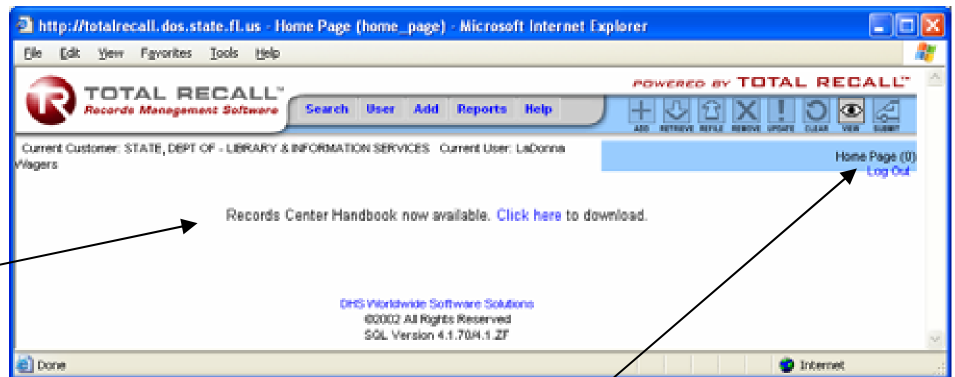
The Total Recall SQL Web Module program displays a menu bar at the top of the page, which contains dropdown submenus. Here the user controls program operation and submits orders for processing. **Since all of the screens are available within the menu bar submenus, it is not advisable to use the <Back> button on your browser's toolbar. Use the menu buttons instead.**

Home Page screen components

- ***Displays after login***
- ***Available from User dropdown menu***

CURRENT CUSTOMER: Displays the agency's name. ***CURRENT USER:*** Displays the user's name.

NOTE*:* Look for important messages about State Records Center operation on the Total Recall Home Page.



Indicates that the user is on the ***Home Page*** and there are ***0*** items on the current order. The **<Log Out>** button logs the user out of Total Recall.

The ***MENU BAR*** has dropdown menus that are used to navigate the Web module.

The items on the ***Menu Bar*** will be explained in following chapters.

MENU ACTION BAR as displayed from the ***Home Page***

From the ***Home Page***, the only item available on the ***Menu Action Bar*** is the **<View>** button.

VIEW: Displays items on the user's order which have not been sent.

Search screen components

There are three Search screens:

- ***Search – Quick Search***
- ***Search – Advanced Search***
- ***Search – Item***

These screens are:

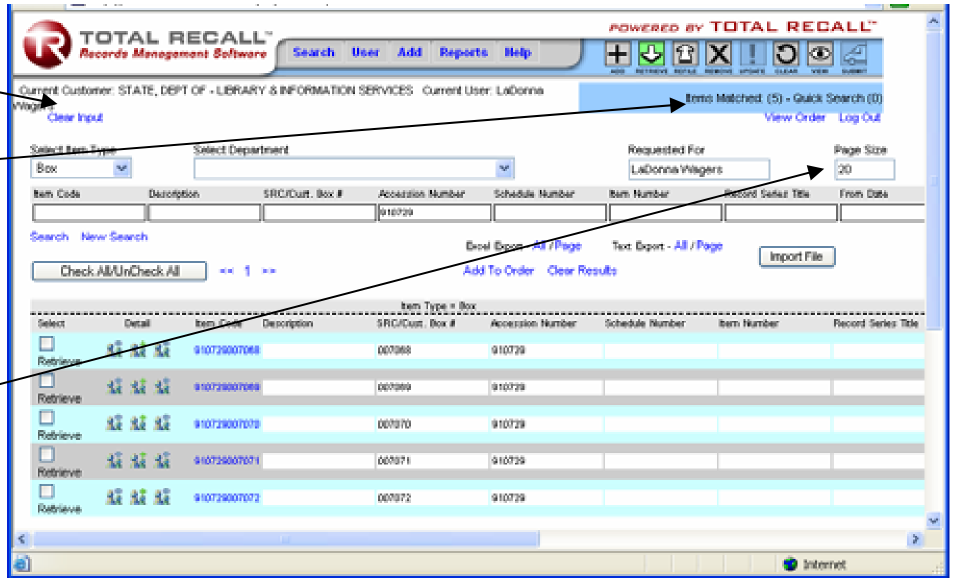
- ***Used to retrieve, refile, and remove boxes and files***
- ***Available from the Search dropdown menu***

Each of the Search screens has similar components which are illustrated below.

<Clear Input> removes search fields from the screen.

Items Matched (5) indicates there are (5) items in the current search results (listed at the bottom of the screen). **Quick Search (0)** indicates the user is on the Quick Search screen and that there are (0) items on the current order.

Page Size indicates the number of items that will be displayed on a page. The user can change this number by entering a new number and pressing the <Enter> key. Maximum is 1,000 items.

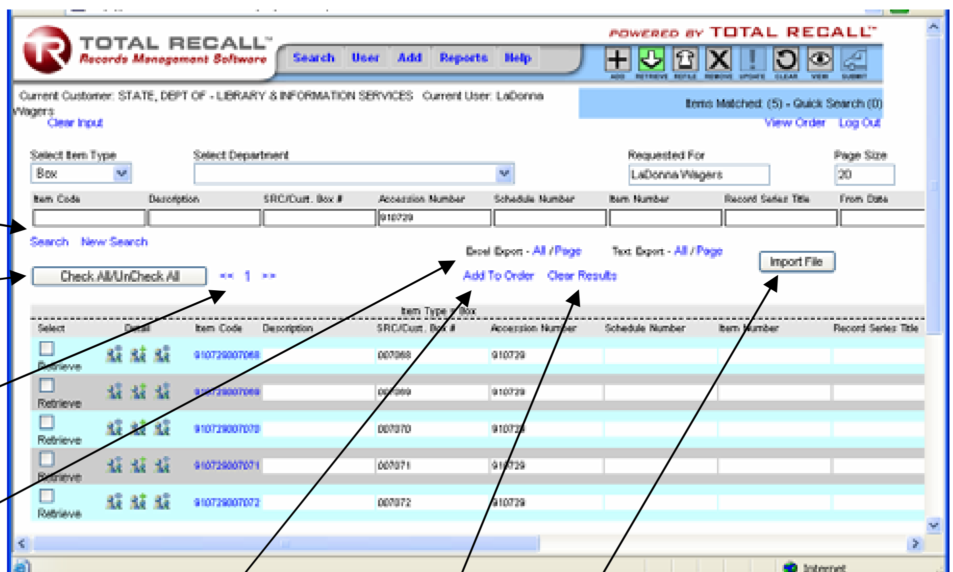


<Search> searches and adds search results below the current search results. **<New Search>** searches and clears current search results before displaying new search results.

Check or uncheck all items in the search results.

Indicates **number of pages of search results**. User can navigate by clicking on the page numbers and arrows.

Allows user to **export** all or the current page of search results to an Excel spreadsheet or a text file.



Adds checked items, in the search results, to the current order.

Clears the search results.

Allows the user to **import a list of Item Codes** to search by.

Menu Action Bar on the Search Screens

From the Search screens, the ***Menu Action Bar*** is used to add and remove items on the user's order, clear the search fields and the search results, change the Requested Action, and view the user's order. The function of each button is listed below.

= Same as "Add to Order" button – adds selected/checked items to the current order.

= Removes search fields from the screen *and* clears the search results.

= Changes **requested action** to "refile."

= Changes **requested action** to "remove."

= Changes **requested action** to "retrieve."

= When order is ready to be sent, click to display the send order screen.

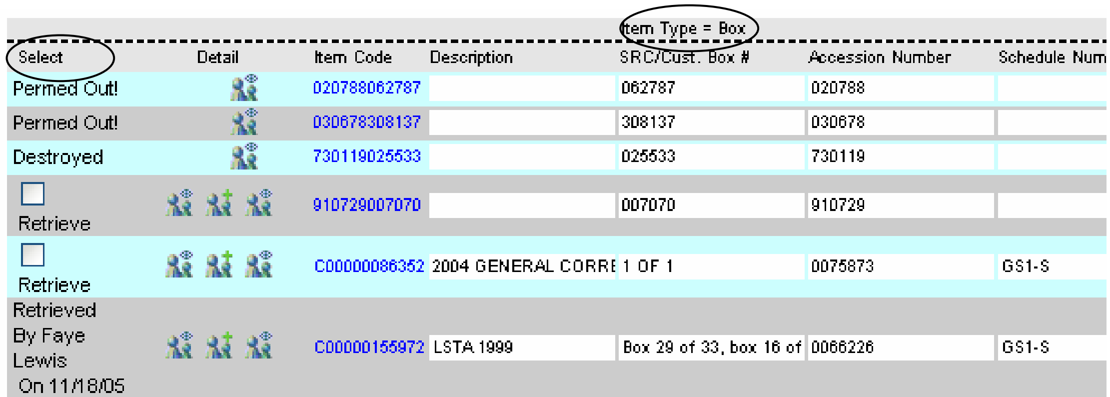
= Removes unchecked items from the current order.

= Click to view items on the current order.

Search Results Grid

The **Select column** indicates the status of each item.

Item Type = Box indicates the items displayed are boxes.



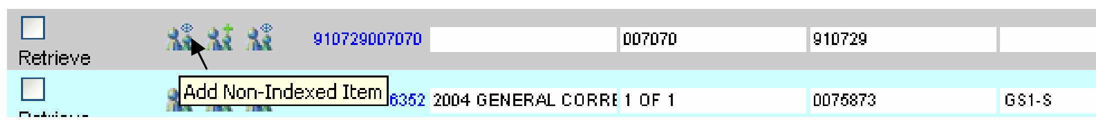
Select	Detail	Item Code	Description	SRC/Cust. Box #	Accession Number	Schedule Num
Permed Out!		020788062787		062787	020788	
Permed Out!		030678308137		308137	030678	
Destroyed		730119025533		025533	730119	
Retrieve		910729007070		007070	910729	
Retrieve		C00000086352	2004 GENERAL CORRE	1 OF 1	0075873	GS1-S
Retrieved By Faye Lewis On 11/18/05		C00000155972	LSTA 1999	Box 29 of 33, box 16 of	0066226	GS1-S

In this example, the selected action is *Retrieve*, so the items that are available for retrieval have a check box in this column. For the other items, the Select column shows their current status.

Detail column on the Search Results Grid

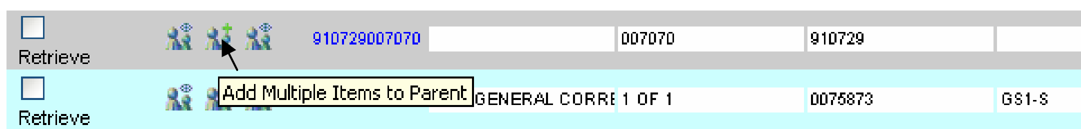
The **Detail column** allows the user to see details about the item displayed.

The first symbol is "**Add Non-Indexed Item.**"



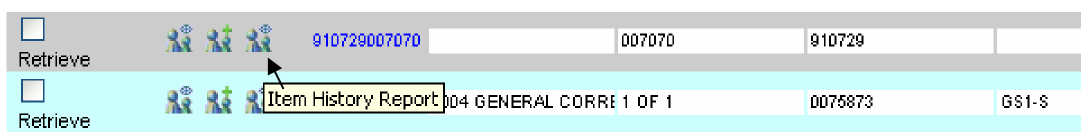
Displays files indexed in the box and allows the user to **retrieve those files or index additional files in the box**.

The second symbol in the **Detail column** is "**Add Multiple Items to Parent.**"



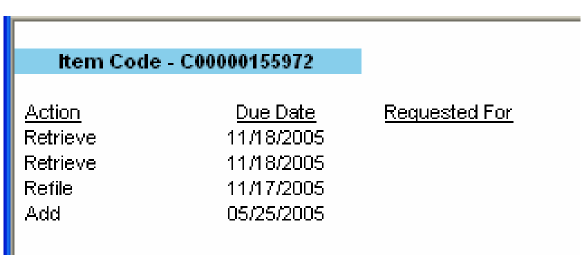
Allows the user to **index multiple files** in the box. Note that this option does NOT display files already indexed in the box.

The third symbol in the **Detail column** is "**Item History Report.**"



Displays an **Item History Report** for the item, showing what actions have been taken on the item. A sample report is displayed below:

Item History Report for item C00000155972. It shows when the item was added, retrieved, and refiled.

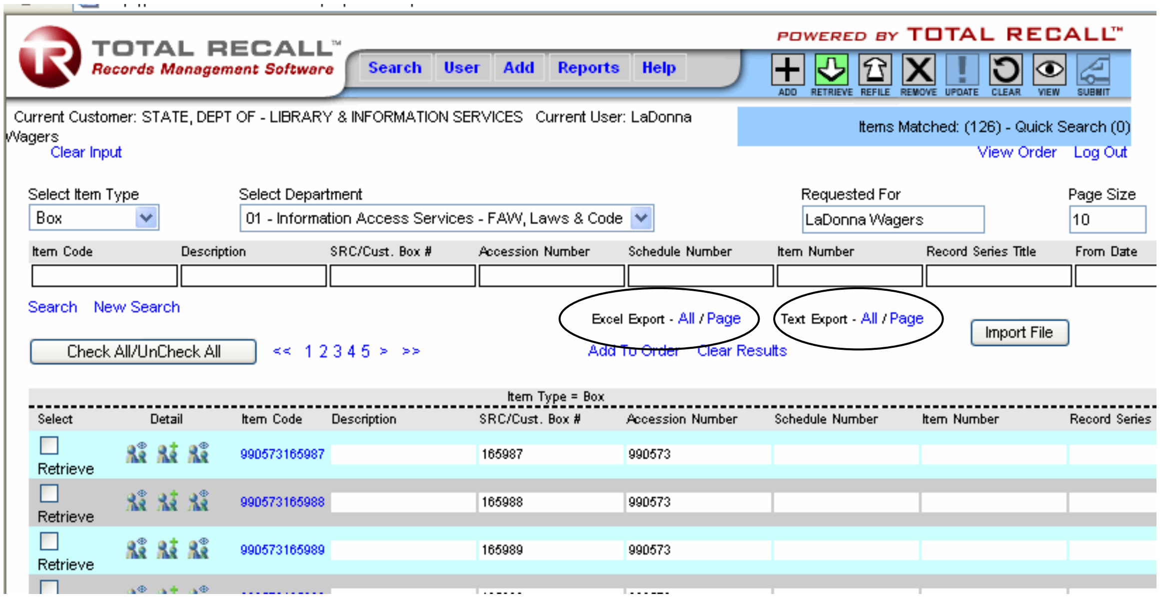


Item Code - C00000155972

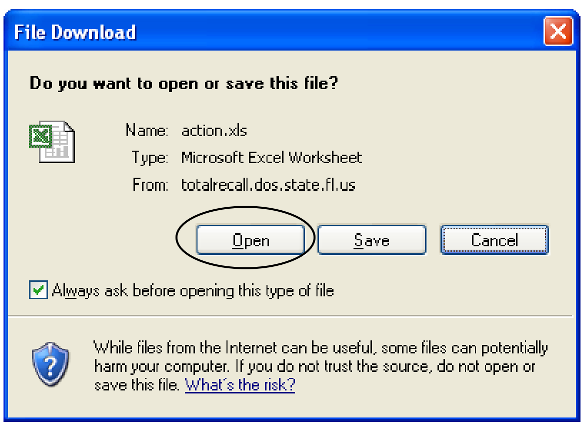
Action	Due Date	Requested For
Retrieve	11/18/2005	
Retrieve	11/18/2005	
Refile	11/17/2005	
Add	05/25/2005	

Exporting Search Results to an Excel File or a Text File

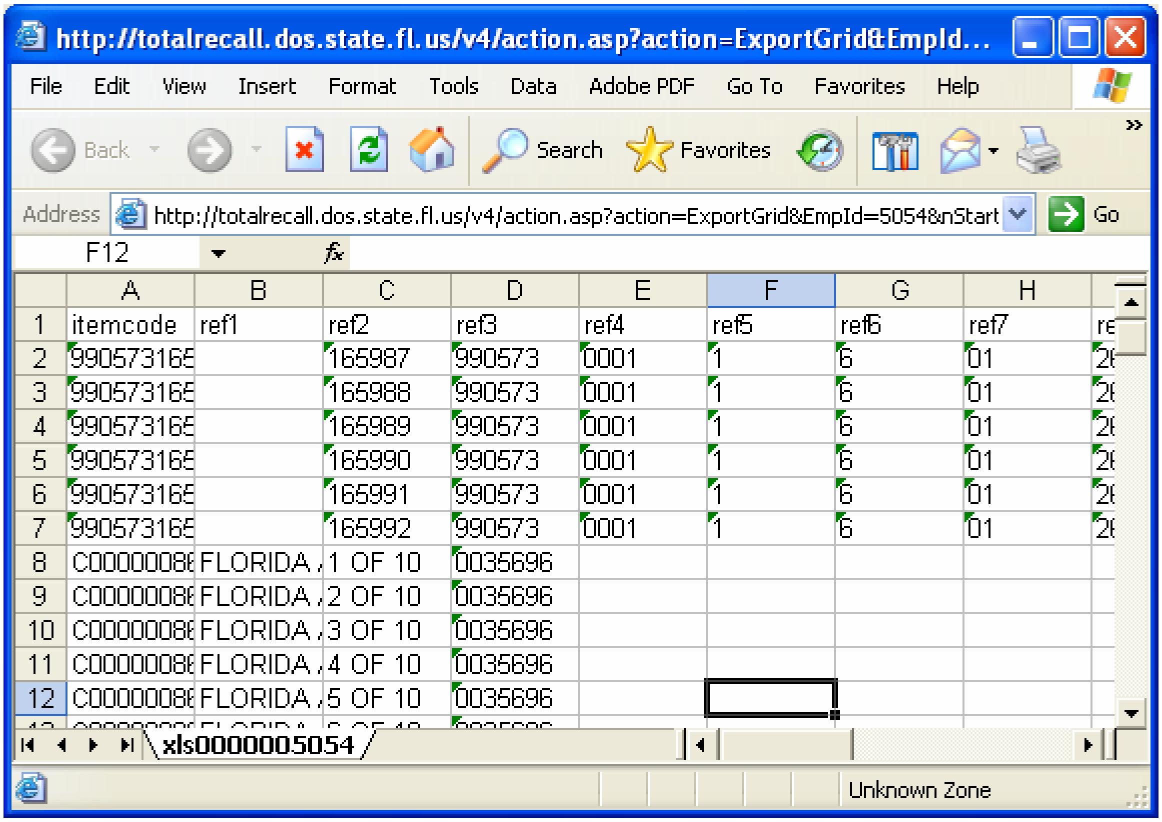
From the Search screens the user has the ability to export the search results to a Microsoft Excel file or a text file. This provides a means of getting inventory data into a format that can be manipulated by the user to produce reports or printouts of customer inventory stored at the Records Center.



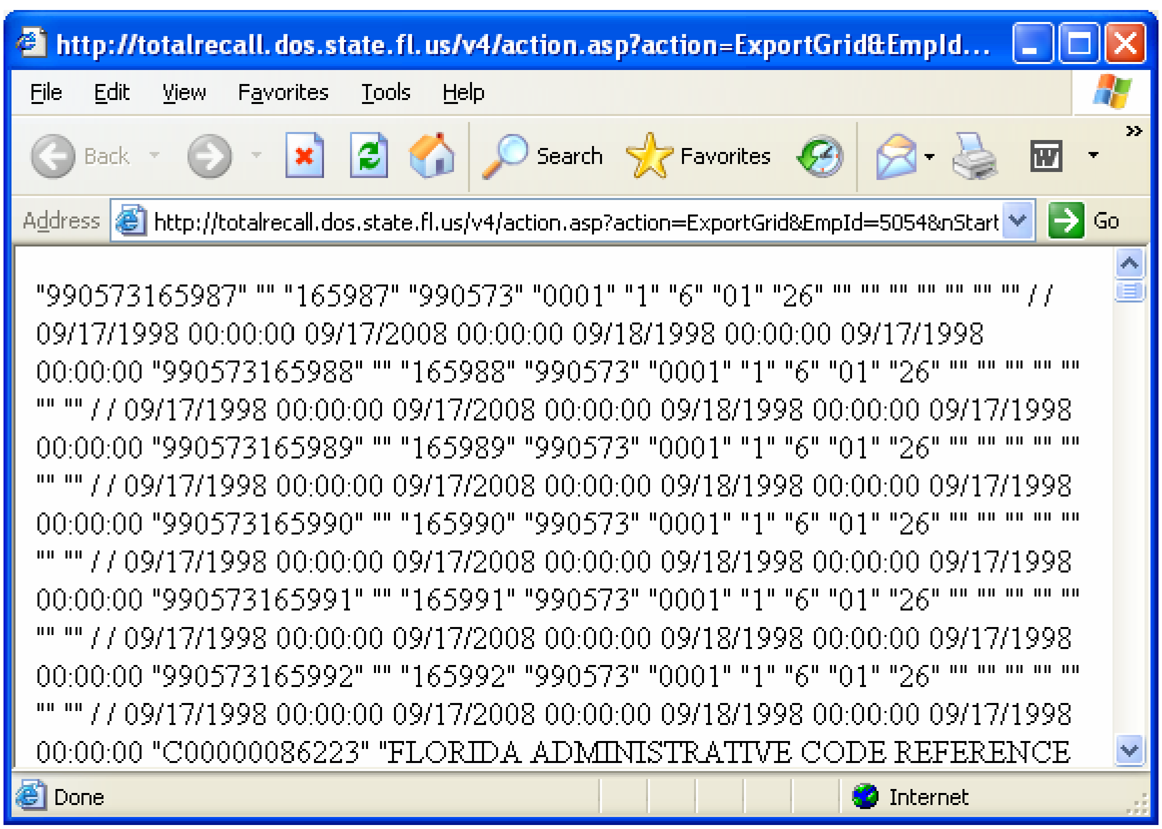
The user may choose to export **all** of the items in the search results or just the current **page** by clicking on the "All" or "Page" button next to the Excel Export or the Text Export.



Depending on the user's workstation settings, a "File Download" dialogue box *may* be displayed and the user can choose to "open" or "save" the export file.



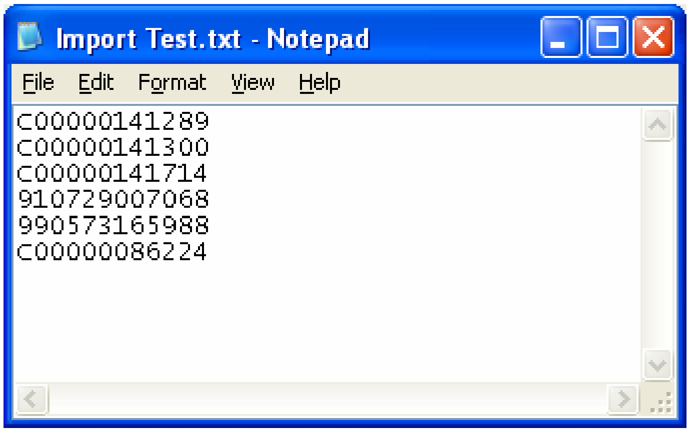
The screen shot above shows a sample **Excel spreadsheet file** containing the exported search results.



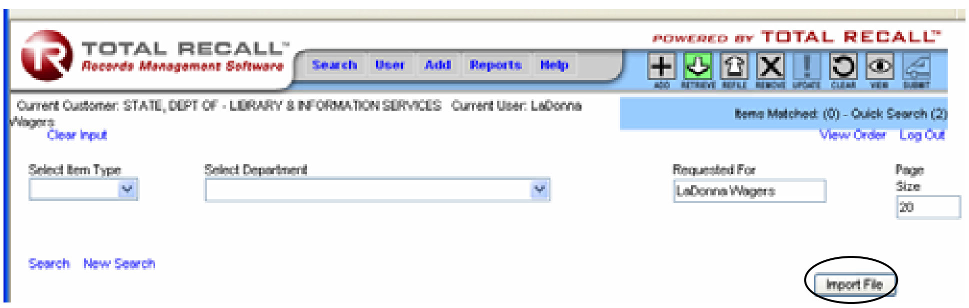
The screen shot above shows a sample **text file** containing the exported search results.

Searching using an Import File

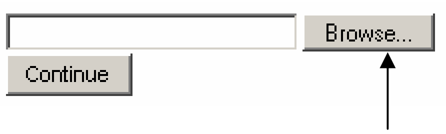
From the Search screens the user has the ability to search for items using a file to import Item Codes to search for.

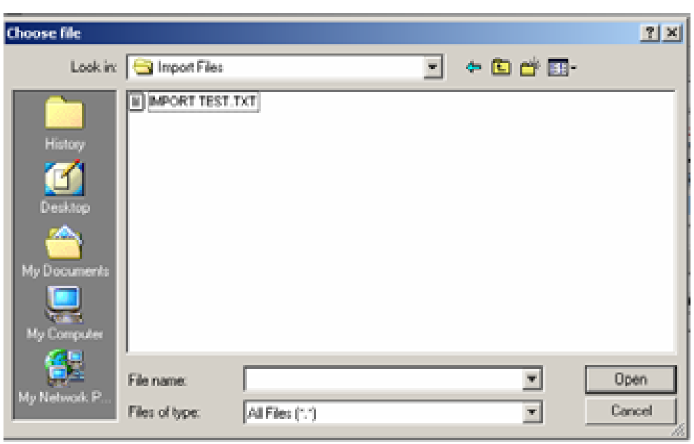


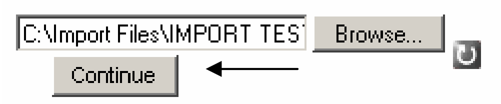
In this example we will use the import file shown above. Note that the import file must be a text (.txt) file containing text only (no formatting from Word or other software packages):



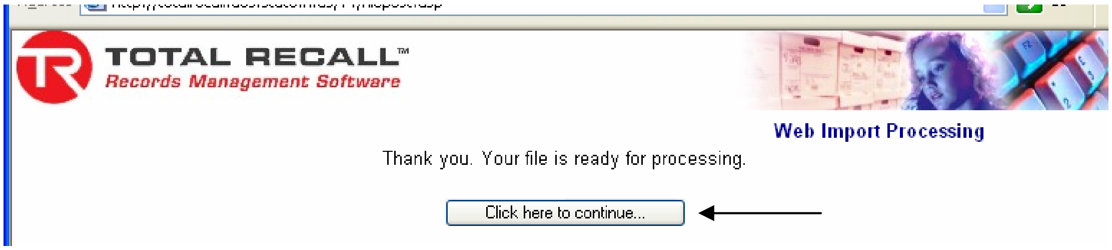
By clicking on the <Import File> button, the user is able to browse for a file from which to import.





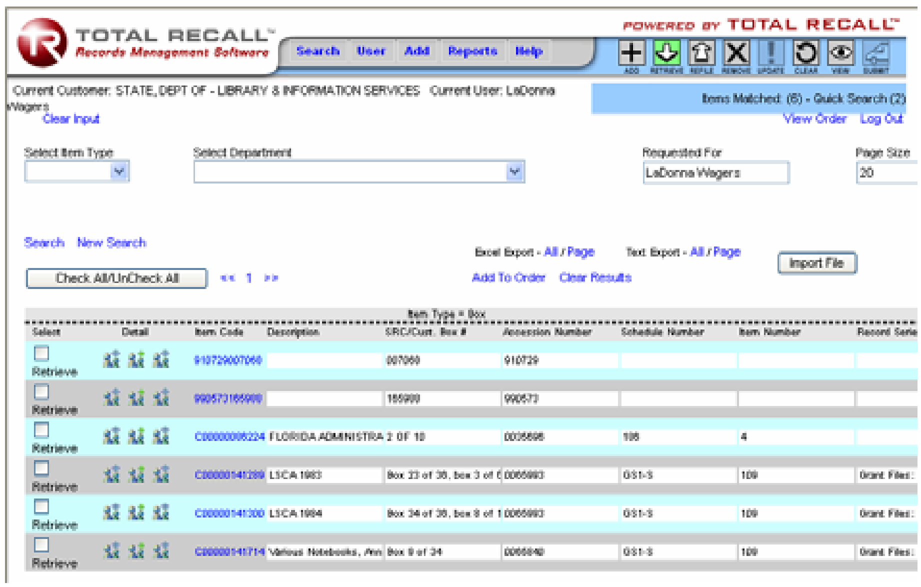


Clicking on the <Continue> button after selecting the file will prepare the file for processing.



Clicking the <Click here to continue…> button will begin the search.

A sample of the search results from a file Import search.



The search results will be displayed just as they are for other searches.

CHAPTER 3 – Retrieving, Refiling, and Removing Boxes and Files

There are three menu options that can be used for retrieving, refiling, and/or removing boxes or files:

- Search – Quick Search
- Search – Advanced Search
- Search – Item

The components of these screens are illustrated in Chapter 2. Here we will focus on the steps the user takes to retrieve, refile, or remove items using the three different screens.

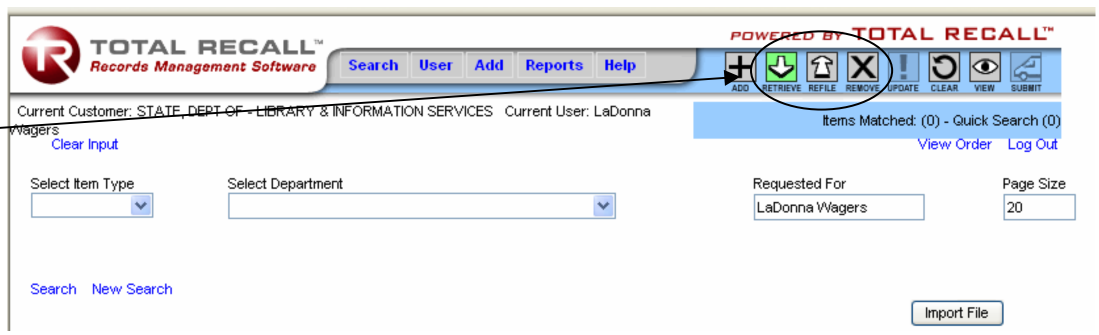
From the Search - Quick Search screen – retrieving, refiling, and removing items:

Select **Quick Search** from the Search dropdown menu.

Select:

- Retrieve,
- Refile, or
- Remove

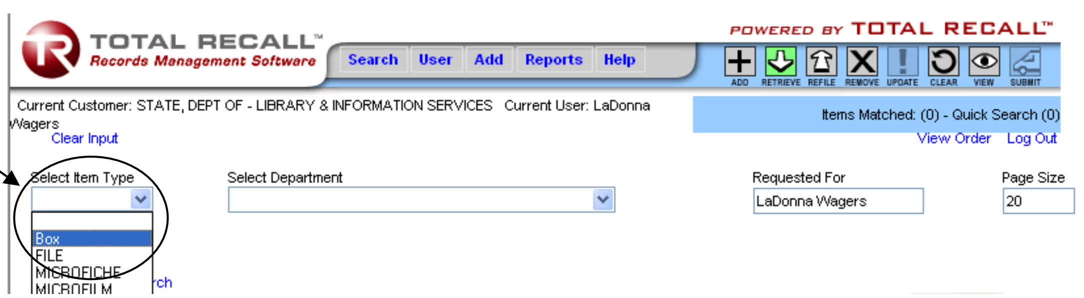
by clicking on the desired choice.



The current **Requested Action** is displayed in green. "Retrieve" is the default requested action. **Note**: If you remove a box or file, you will not be able to return it to the Records Center; it is a **Permanent Removal**.

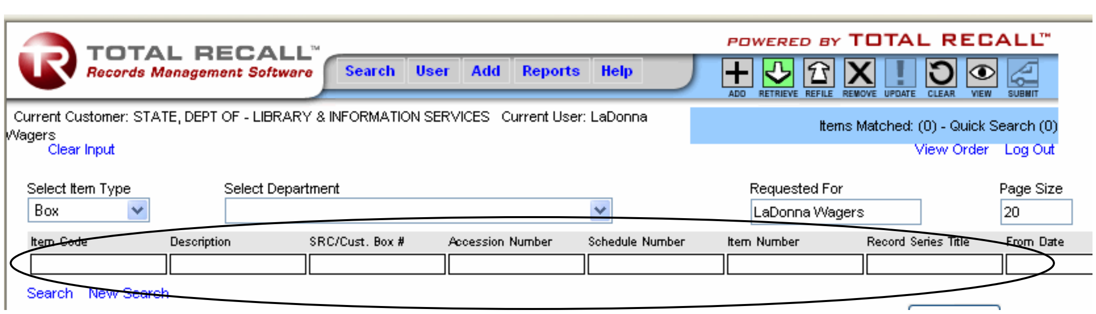
Select:

- Box, or
- File

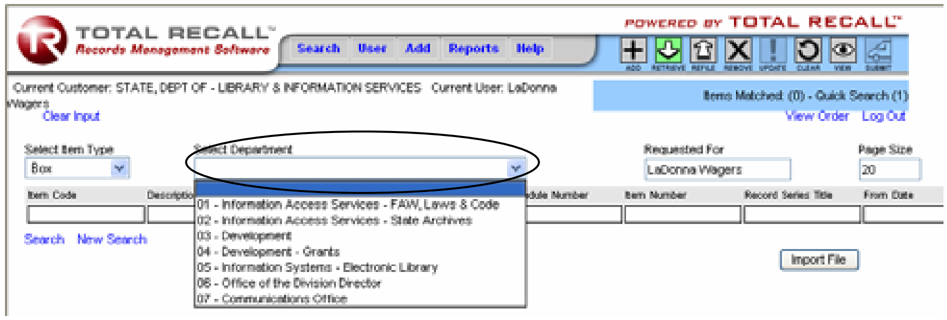


The **search fields** are displayed.

The fields displayed are based on the Item Type selected.



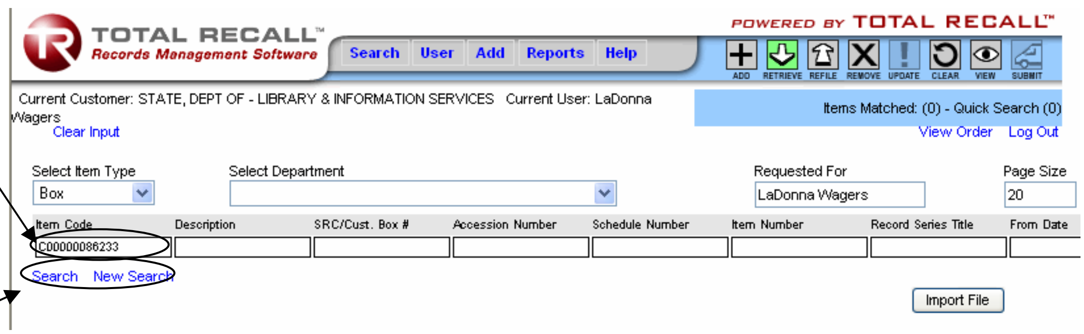
If searching for records in a specific Department, then **select the Department** from the dropdown list.



Note: If your agency's account is not departmentalized, Select Department will NOT be displayed.

Enter search criteria in *one* of the search fields.

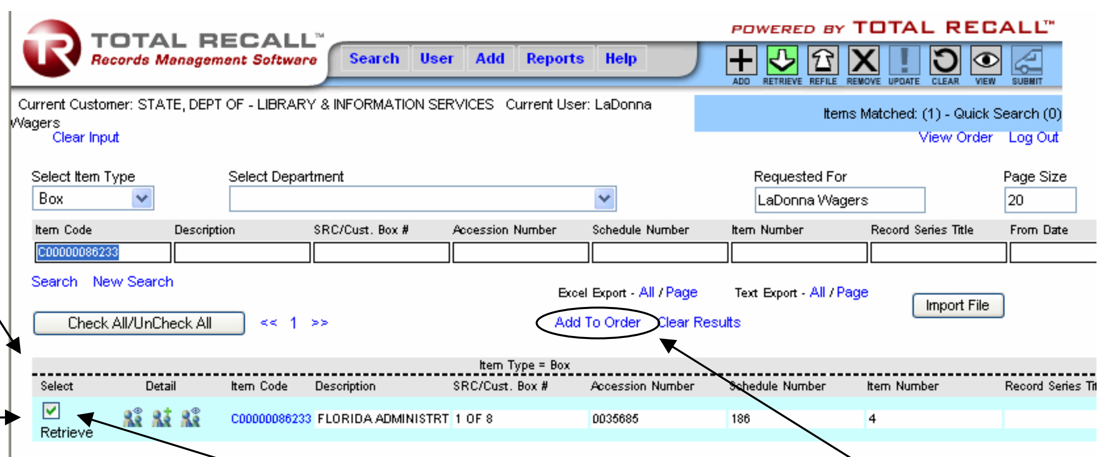
Then press **Search** or **New Search** to perform the search.



This will search for a box with Item Code "C00000086233."

The **search results** are displayed at the bottom of the screen.

Since there is only one item in the search results, the item is automatically checked.



To place this item on the user's order, make sure the item is checked and then click **<Add to Order>**.

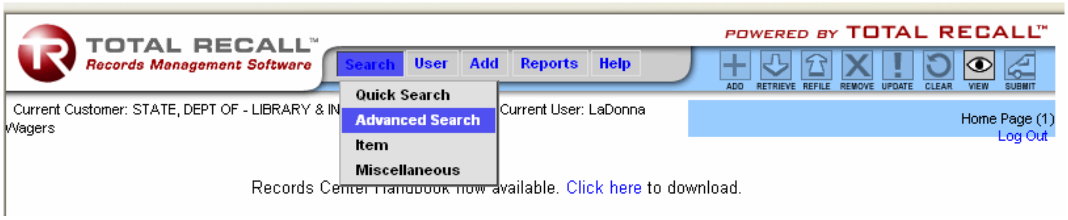
The steps above can be repeated to add additional items to your order. Note: Do not mix items for retrieval, refile, and remove. Each type of service should be submitted on separate orders.

Sending your order

Refer to Chapter 7 for instructions on sending your order.

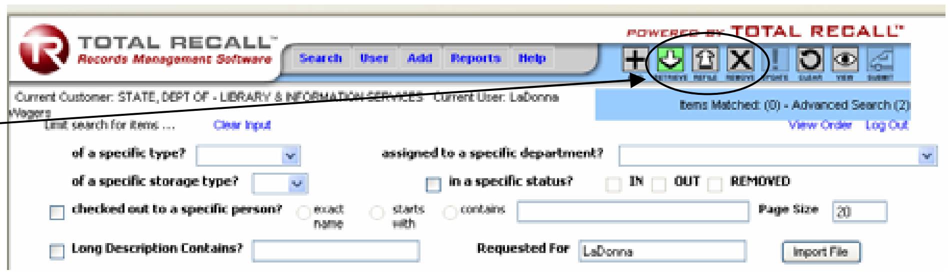
From the Search - Advanced Search screen – retrieving, refiling, and removing items:

Select **Advanced Search** from the Search dropdown menu.



Select the **Requested Action** by clicking on the desired choice:

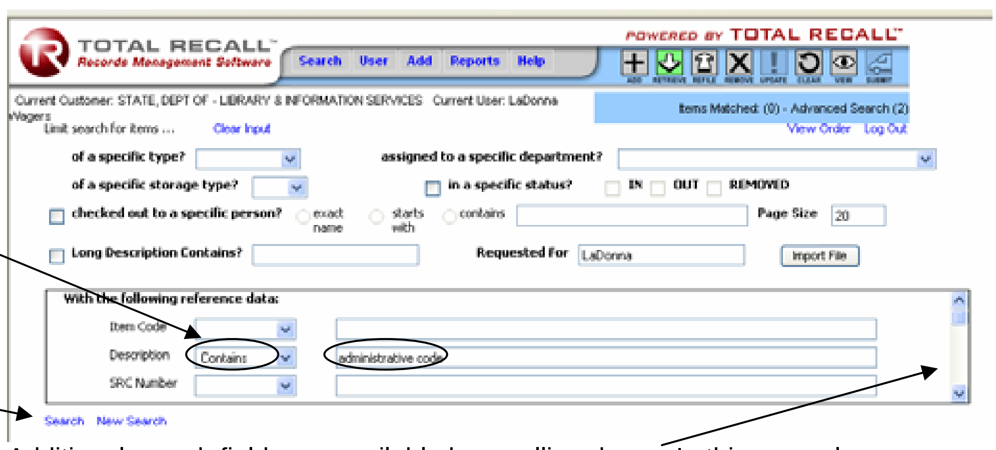
- Retrieve,
- Refile, or
- Remove



The current **Requested Action** is displayed in green. "Retrieve" is the default requested action. **Note:** If you remove a box or file, you will not be able to return it to the Records Center; it is a **Permanent Removal**.

The Advanced Search allows **more flexible search criteria**. For example, you can look for items that contain a certain phrase using the search box here.

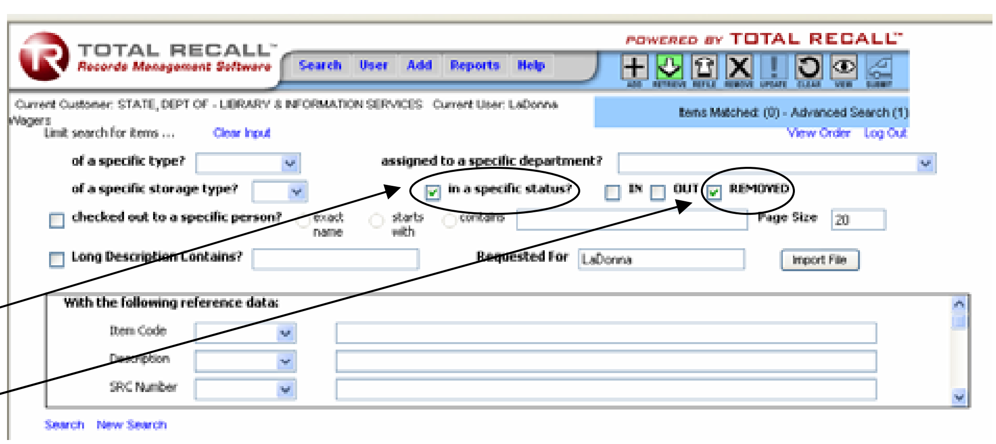
After entering the search criteria, press **Search** or **New Search** to display the search results.



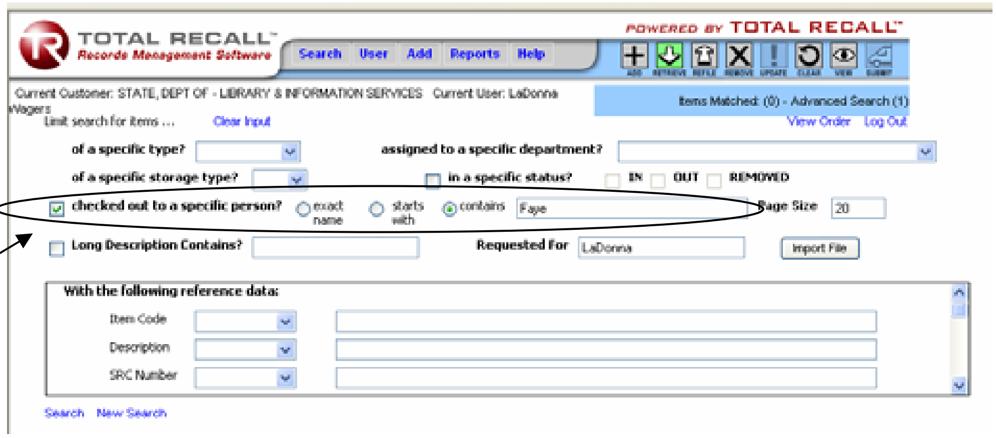
Additional search fields are available by scrolling down. In this example, we are searching for boxes where the **Description** field **contains** the phrase "**administrative code**."

The Advanced Search also allows the user to search for **items that have been removed** from inventory:

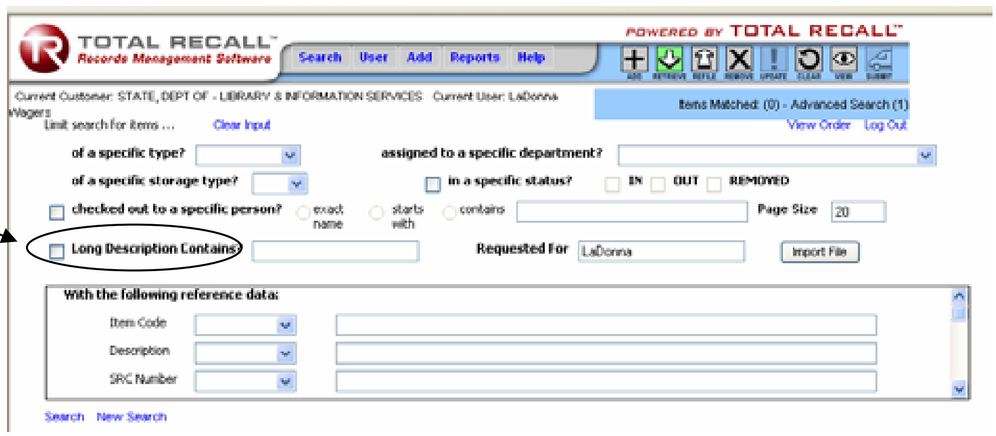
- Check the box labeled "in a specific status?" and
- Check "REMOVED."



To search for **items that are checked out to a specific person**, use the “checked out to a specific person?” check box.



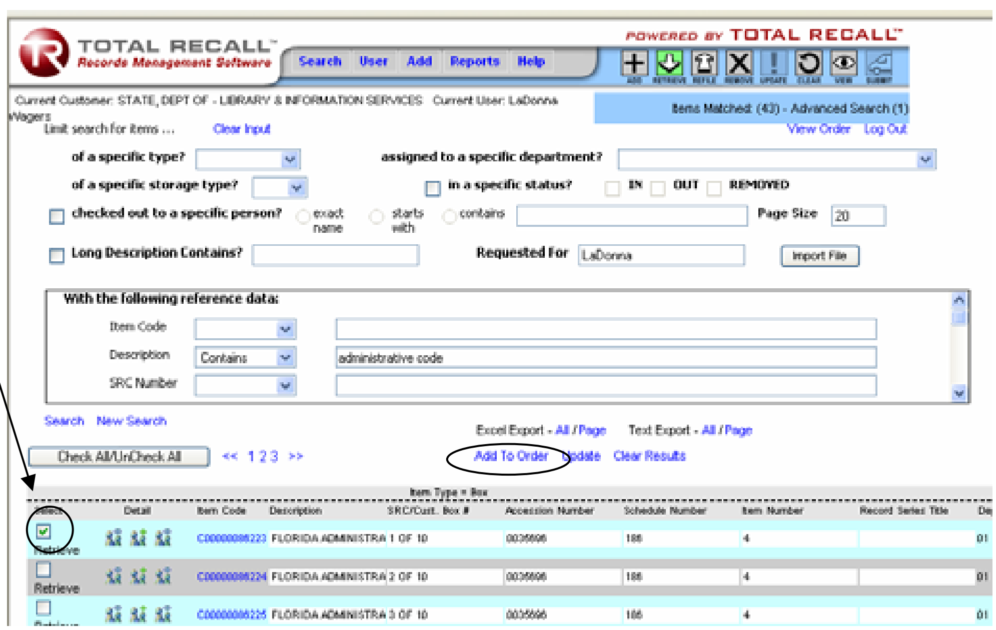
Note: We do NOT use the Long Description field.



As with the Quick Search, the **search results** are displayed at the bottom of the screen after pressing **Search** or **New Search**.

To place an item on the user’s order:

- Check the box in the Select column and
- Click **<Add to Order>**.



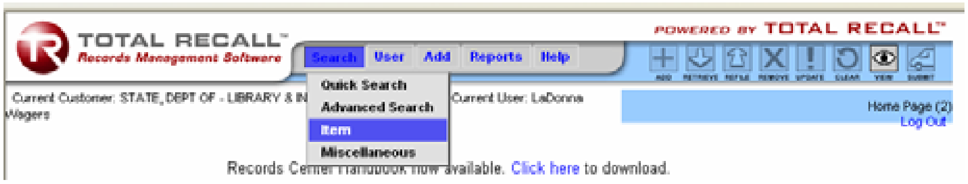
The steps above can be repeated to add additional items to your order. Note: Do not mix items for retrieval, refile, and remove. Each type of service should be submitted on separate orders.

Sending your order

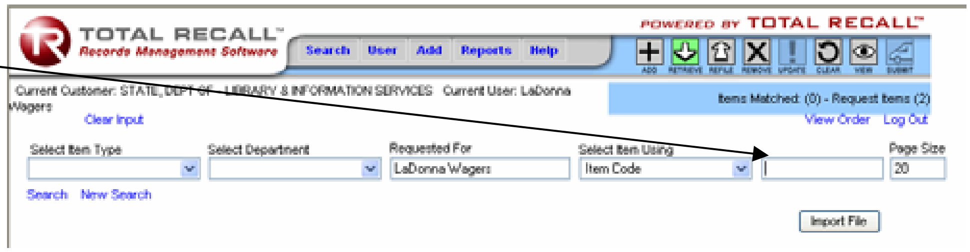
Refer to Chapter 7 for instructions on sending your order.

From the **Search - Item** screen – retrieving, refiling, and removing items:

Select **Item** from the Search dropdown menu.



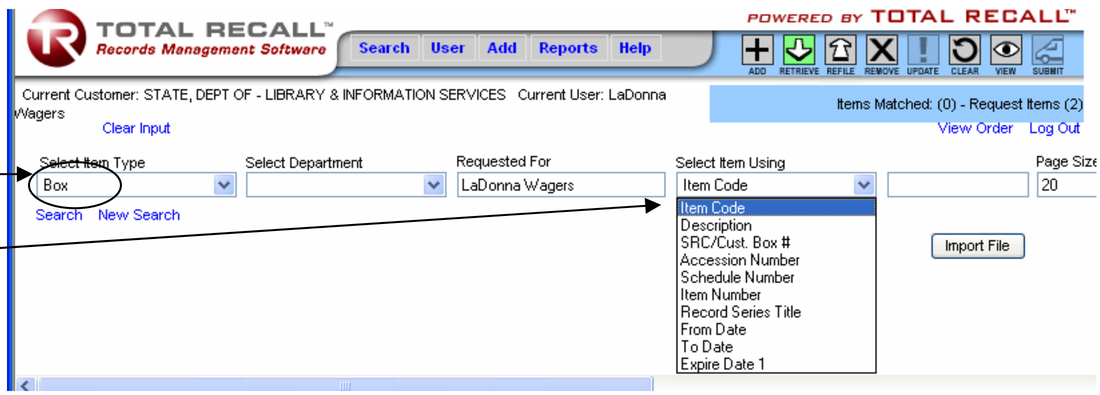
To search by Item Code, the user only needs to **enter the Item Code** in the blank box after Item Code.



Then press **Search** or **New Search**.

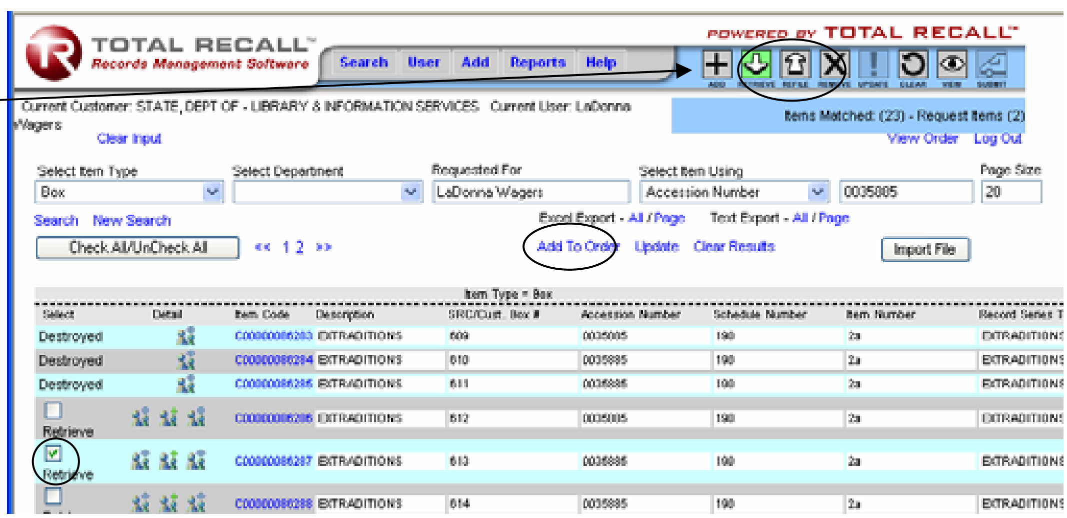
The Search - Item screen is set to **search by Item Code by default**.

From this screen, you can also search for a specific **Item Type** and by **other fields** based on the Item Type selected.



To change the **Requested Action**, click on the desired choice:

- Retrieve,
- Refile, or
- Remove



Once the search results are displayed, the user can **add items to the order** by checking the box in the Select column and pressing **<Add to Order>**.

The current **Requested Action** is displayed in green. "Retrieve" is the default requested action. **Note:** If you Remove a box or file, you will not be able to return it to the Records Center; it is a **Permanent Removal**.

The steps above can be repeated to add additional items to your order. Note: Do not mix items for retrieval, refile, and remove. Each type of service should be submitted on separate orders.

Sending your order

Refer to Chapter 7 for instructions on sending your order.

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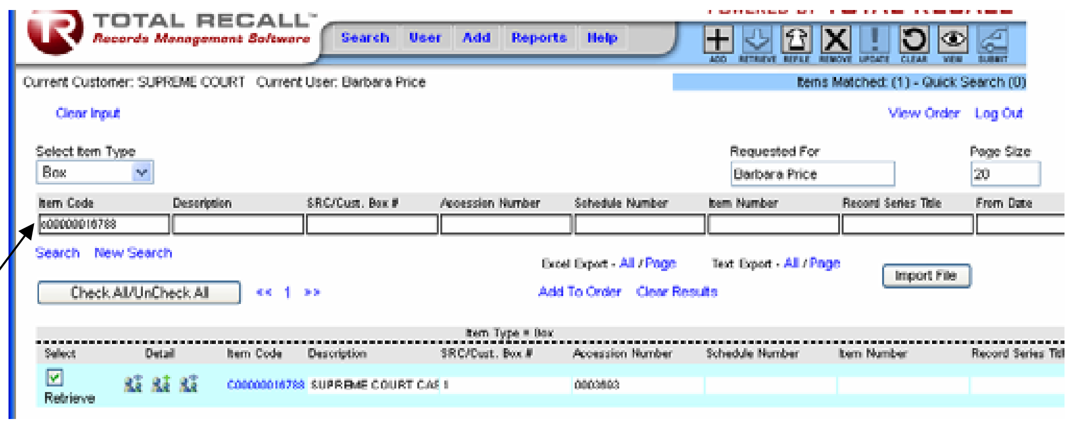
C H A P T E R 4 – Searching For, Indexing, and Retrieving Files

This chapter explains how to index and retrieve files. If the file you are looking for has already been indexed, and you know the Item Code or Barcode assigned to the file, you can retrieve, refile, or remove the file by following the instructions in Chapter 3. If you do not know if the file has an assigned Item Code or Barcode, follow the instructions below.

The following steps can be performed from any of the Search screens – Quick Search, Advanced Search, or Search – Item.

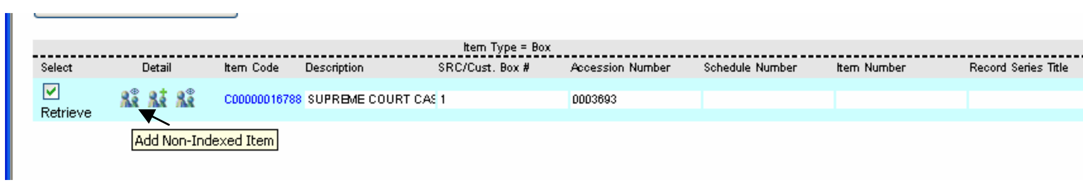
Since you do not know if the file has been indexed, you must **first search for the box** in which the file is located.

In this example, we are using the **Quick Search screen** and searching for box **C00000016788**.



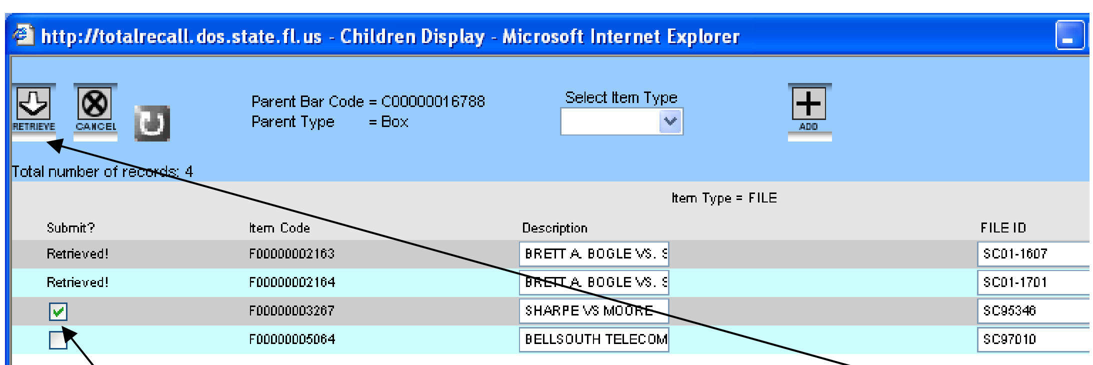
Enter the search criteria and click **Search** or **New Search**.

When the box is displayed in the results grid, **click on the first symbol** in the Detail column.



Click the **Add Non-Indexed Item** symbol to display files that are indexed in the box.

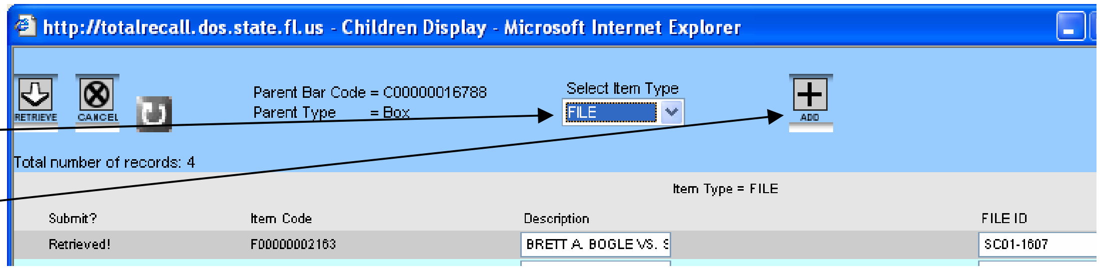
The **Children Display** screen will display. This screen shows files that have been indexed into the box.



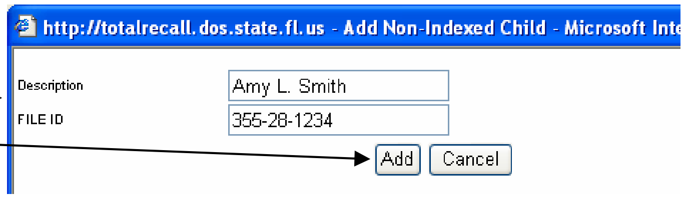
If the file you need IS listed, you can simply **check the file and press the Retrieve button to add it to your order**.

After the file is added to your order, the **Submit?** column will display **On Order!**, indicating the file has been placed on your order.

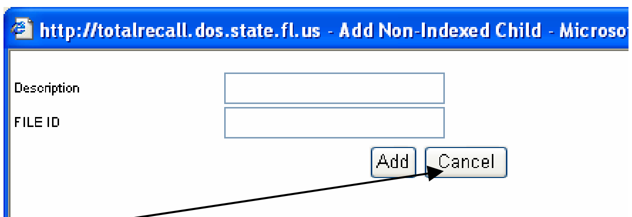
If the file you need is NOT listed, click the down arrow for Select Item Type and **select "File."** Then **press the ADD button**.



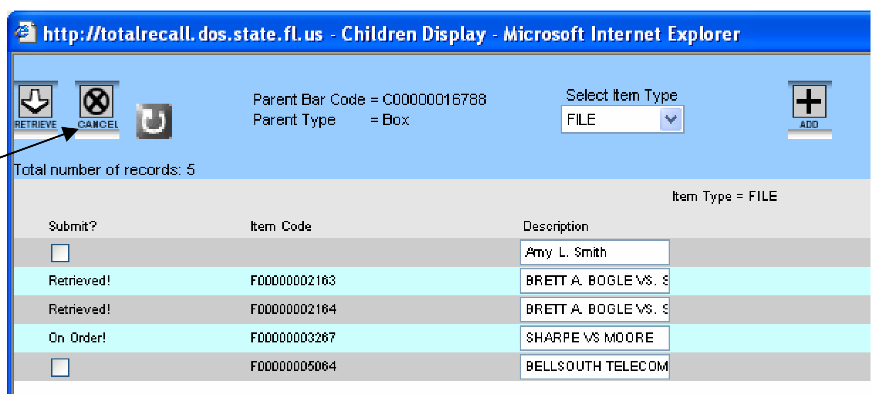
The **Add Non-Indexed Child** screen will display. To index the file, enter the **Description** and **FILE ID** and press the ADD button.



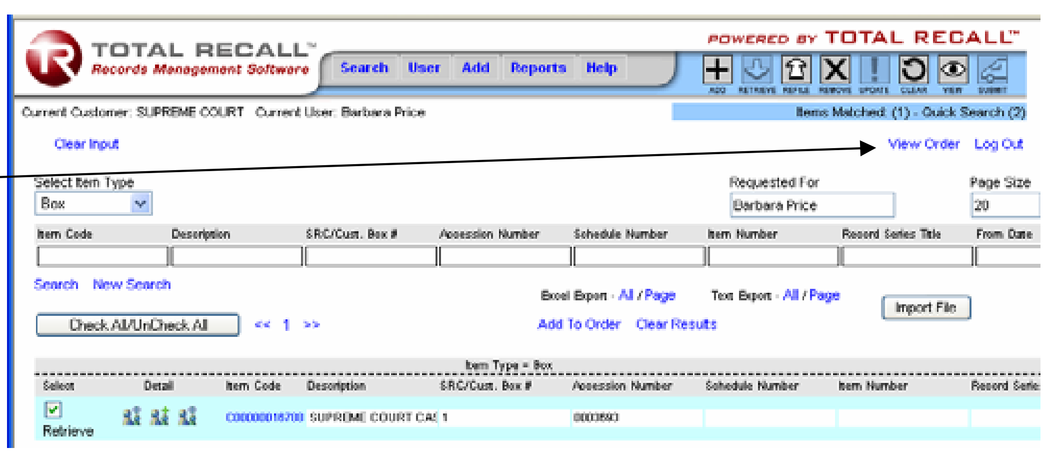
A blank Add screen appears, which allows you to enter additional files, if desired. When you are done entering files, press the **Cancel** button to close the window.



To close the Children Display window, press the **CANCEL** button.

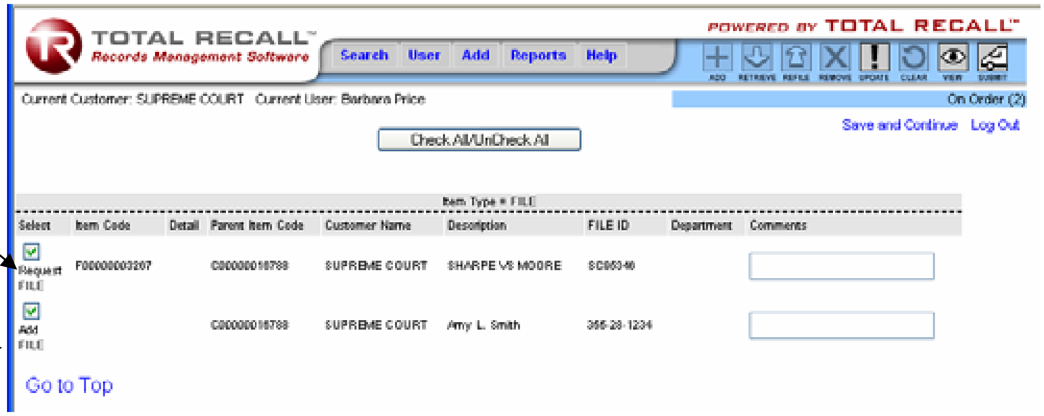


Once you are back on the search screen, click the **<View Order>** button to see the files that were placed on your order.



The file that was **already indexed** in the box and that we added to our order is listed here.

And the file that we **indexed** and added to our order is listed here.



The steps above can be repeated to add additional items to your order. Note: Do not mix items for retrieval, refile, and remove. Each type of service should be submitted on separate orders.

Sending your order

Refer to Chapter 7 for instructions on sending your order.

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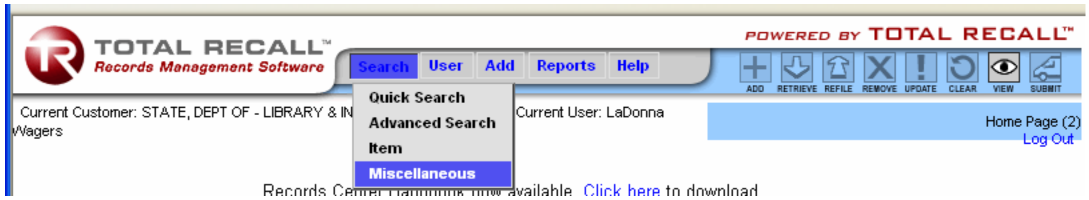
CHAPTER 5 – Ordering Flat Boxes and Barcode Labels

This chapter explains how to order records storage boxes (“flats”) and barcode labels. This is done from the Search – Miscellaneous menu.

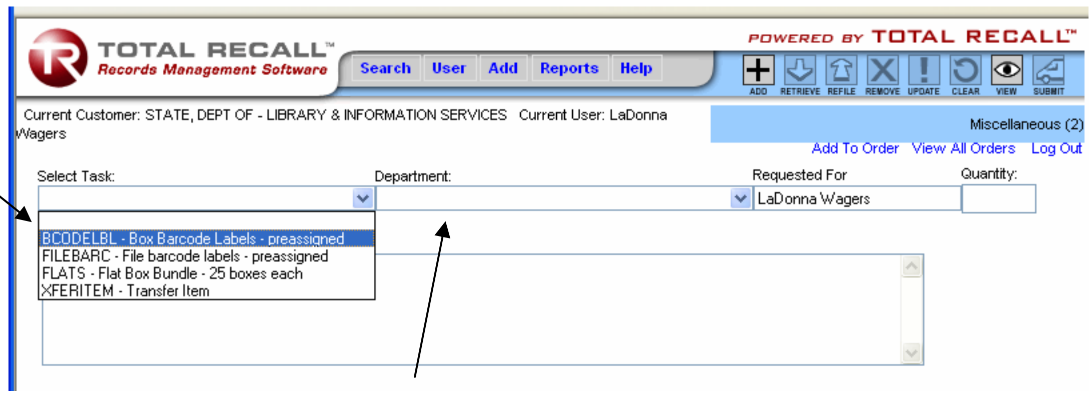
Select:

Search – Miscellaneous



To order box barcode labels:

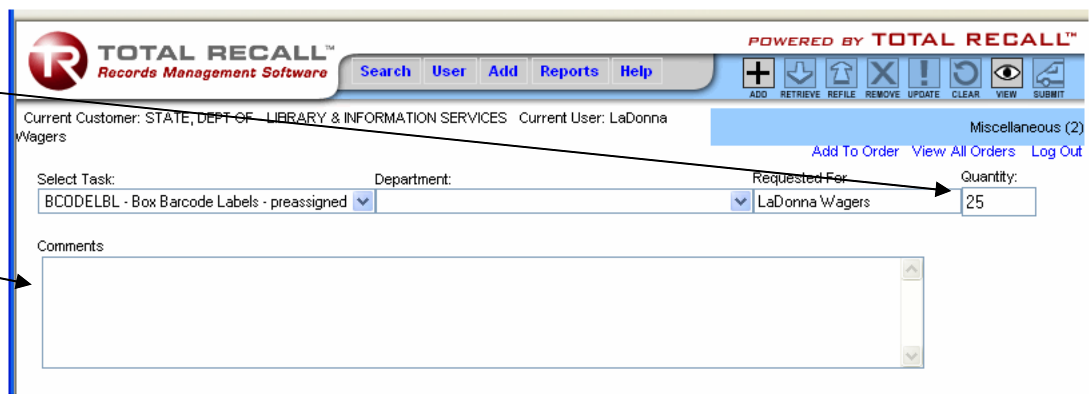
- Select **Box Barcode Labels – preassigned** from the Select Task dropdown.



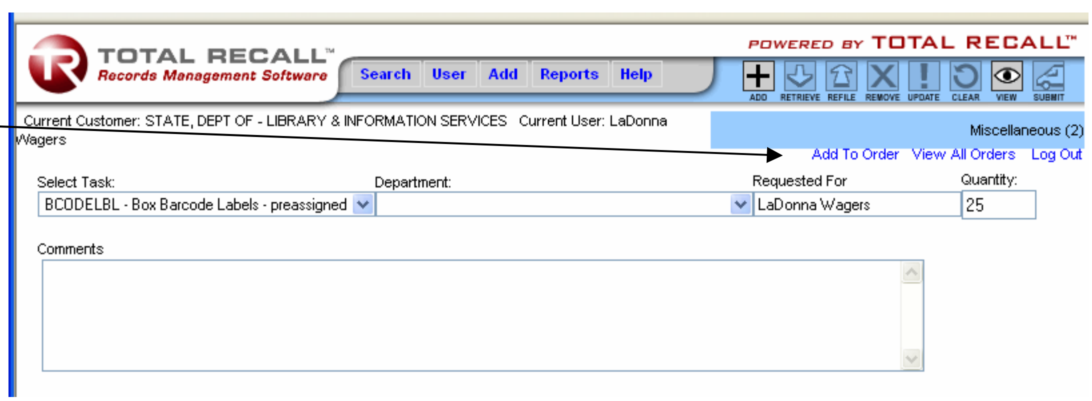
You may also select a **Department** from the dropdown menu, if applicable.

Enter the desired number of labels in **Quantity**.

Comments entered here will be sent with your order.

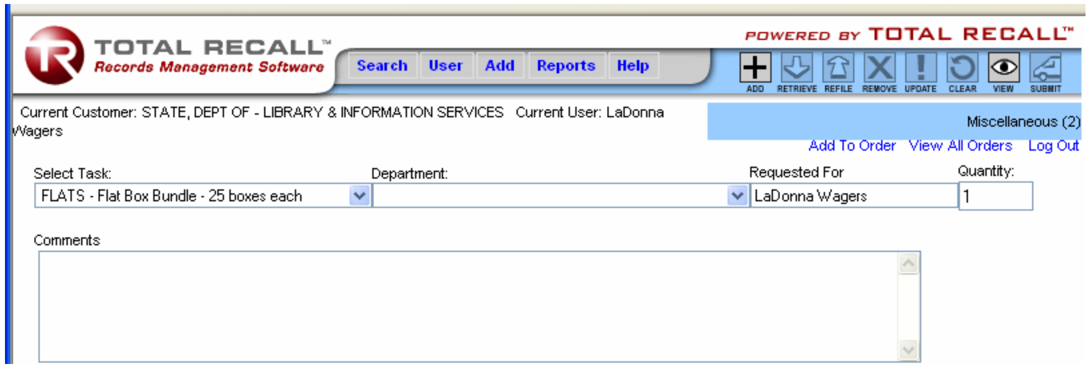


Press the **<Add to Order>** button to add the item to your order.



To order flats:

- **Select FLATS** from the Select Task dropdown.
- **Enter the quantity** (quantity 1 = 25 boxes).
- **Click <Add to Order>.**



Note: FLATS come in bundles of 25, so one (1) FLAT equals 25 boxes.

Flats and Barcode labels can be placed on the same order since they are both ordered using a Miscellaneous priority. Note: Do not mix these with items for retrieval, refile, remove, or new accessions. Each type of service should be submitted on separate orders.

Sending your order

Refer to Chapter 7 for instructions on sending your order.

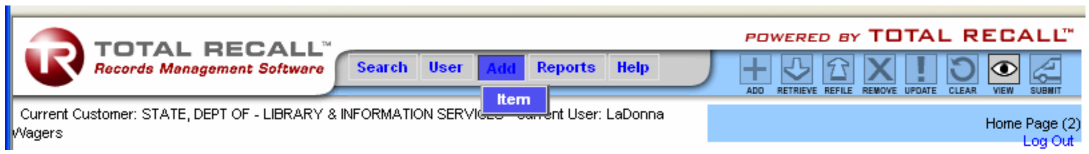
CHAPTER 6 – Adding New Boxes to Inventory

This chapter explains how to create an order to have **new** boxes picked up and stored in the Records Center. Prior to entering the boxes in Total Recall, you must label each box with a records storage box label and a barcode label. For further instructions on packing and labeling your boxes for storage, please refer to *Appendix B – Preparing Records for Transfer*.

Once your boxes are properly packed and labeled, follow the steps below to submit a New Accession order in Total Recall.

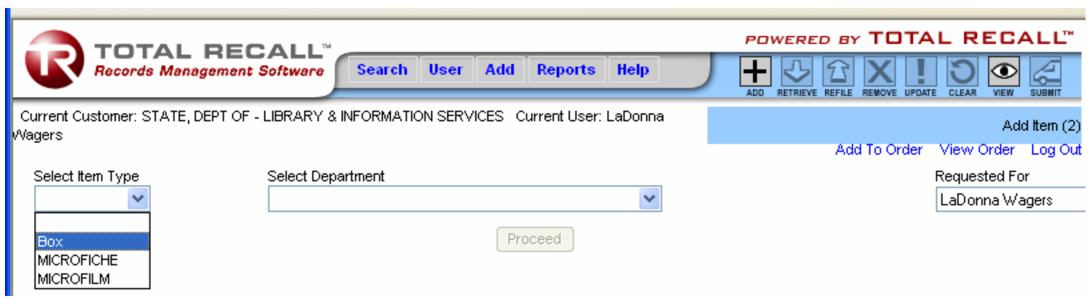
Select:

Add - Item



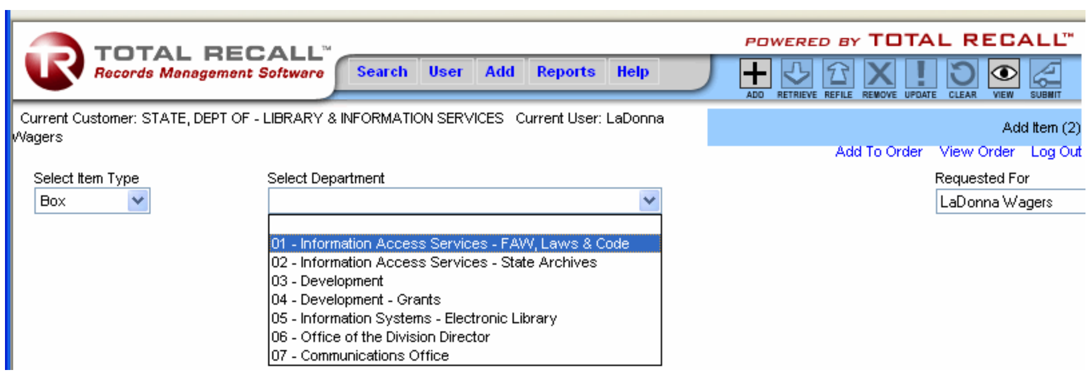
Select:

- **Box**



Select

- **Your Department**

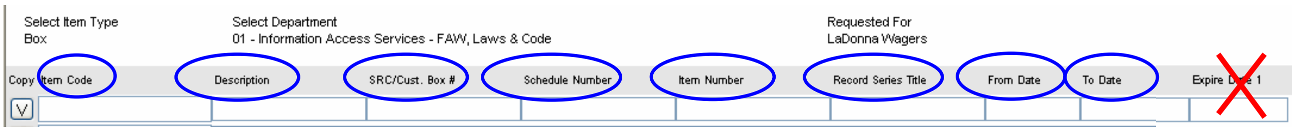


Note: If your agency's account is not departmentalized, then Select Department will not be displayed.

Then:

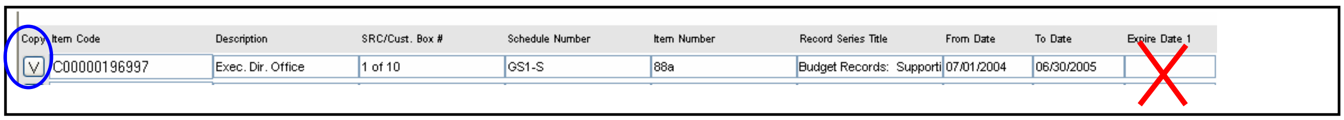
- **Click Proceed**

A grid will be displayed where you will enter your box information, one box per line.



You will then type in the **"Item Code"** (Pre-Assigned Barcode Number), **"Description," "SRC/Cust. Box #,"** retention **"Schedule Number,"** retention schedule **"Item Number,"** retention schedule **"Record Series Title," "From Date,"** and **"To Date."** The **"From Date"** and the **"To Date"** are the inclusive dates of the records and must be included.

Note: Please **IGNORE** the **"Expire Date 1"** field. Do not enter anything in this field. The "Expire Date 1" (expiration date of the boxes) will be calculated when Records Center staff receive the add request.



Use the "Copy" feature to copy information from one line to the next.

NOTE: DESCRIPTION and SRC/CUST. BOX # fields are limited to 100 characters.

NOTE: "From" and "To" dates must be entered in the form mm/dd/yyyy.

SPECIAL NOTE ON PACKING RECORDS IN SRC BOXES

In the illustration above, we have entered the 12-digit Item Code number from the barcode label that is affixed to the box, a Description, Customer Box #, the retention Schedule Number, the Item Number, the Record Series Title, and the From and To Dates.

When entering the Description, avoid vague terms such as "Miscellaneous." If describing a person's files, include the person's position title. For example, rather than saying "Bob Smith's Files," use "Director of Marketing Bob Smith's Promotion Planning Files." Make a note of the range of records in the box for future reference. Please see *Appendix C – Box Information in Total Recall* for more information about Description and From and To Dates.

You must pack only one record series into any one box and **ONLY ONE RECORD SERIES IS ALLOWED ON AN ORDER**. In other words, all the boxes entered on a New Accession work order MUST contain the same type of records and use the same Schedule Number, Item Number, and Record Series Title.

For further instructions on *preparing your boxes for transfer*, please see *Appendix B – Preparing Records for Transfer*.

Note: We recommend that you proof your data entry before pressing the <**Add to Order**> button. Once items are added to the order, they cannot be edited. If changes are necessary, the items must be removed from the order and reentered.

Once you have entered all the necessary information for the box(es), you must click the **<Add to Order>** button to add the items to the order. You may want to use the print option in Internet Explorer to print the items on order before sending the order.

The Add Item screen has space for up to 50 boxes to be entered. If you have more than 50 boxes of the same type of record and you want to send them all on one order, you will need to enter the first 50 boxes and press **<Add to Order>**. Then select Add – Item again from the menu, following the instructions above, and add the next 50. Press **<Add to Order>** and so on until all the boxes are entered.

Sending your order

Refer to Chapter 7 for instructions on sending your order.

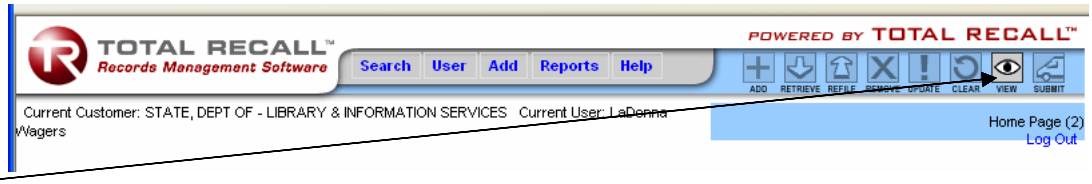
C H A P T E R 7 – Sending Your Order

This chapter explains the steps involved in sending your order. After you have placed the items you need on your order, you are ready to send your order.

You should first **view your order**.

Select:

from the **Menu Action Bar**.

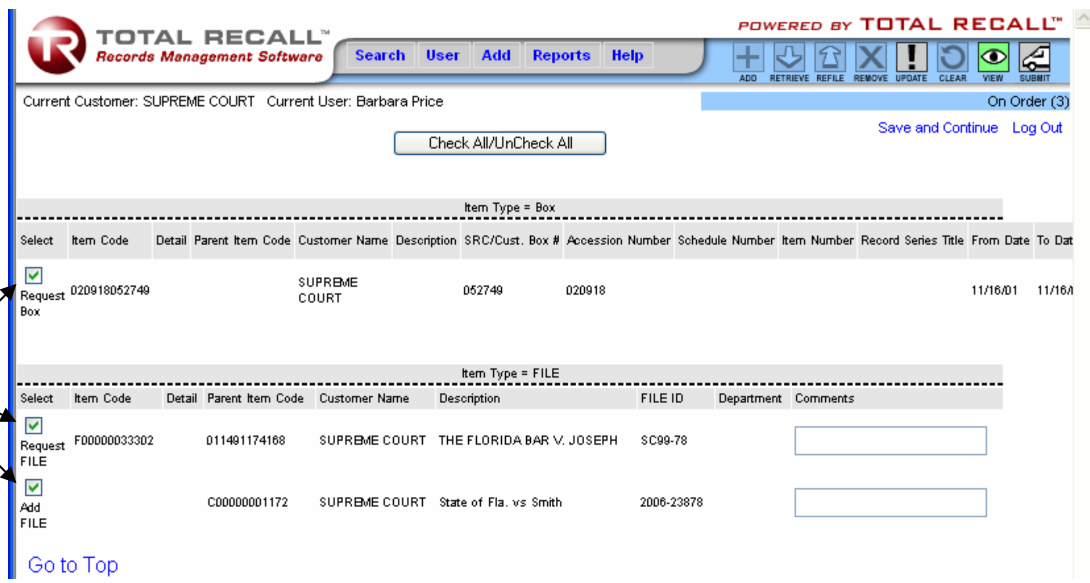


Make sure the items you want are on your order.

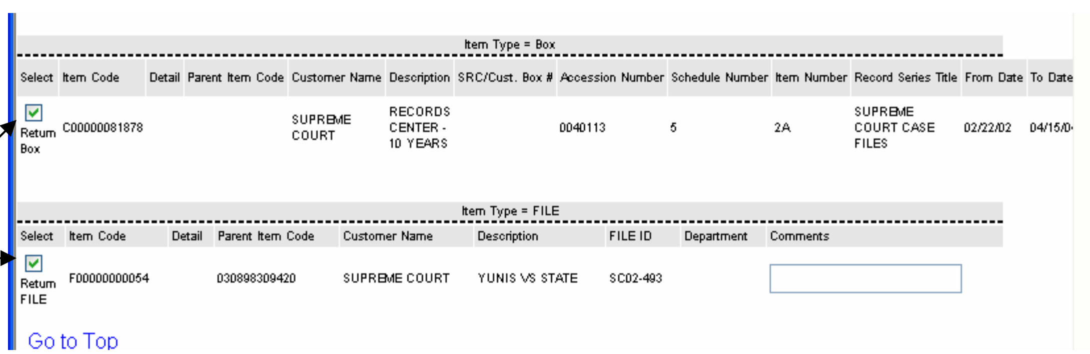
Do not mix items for Reference Request (retrieve), Refile, Permanent Removal (remove), New Accession (add box), and Miscellaneous. **Submit separate orders for each type of service.** Boxes and files can be retrieved on the same order. Similarly, boxes and files can be refiled on the same order. But do not mix *retrieving* a box or file and *refiling* a box or file on the same order.

All the items on your order should be for the **same type of service**.

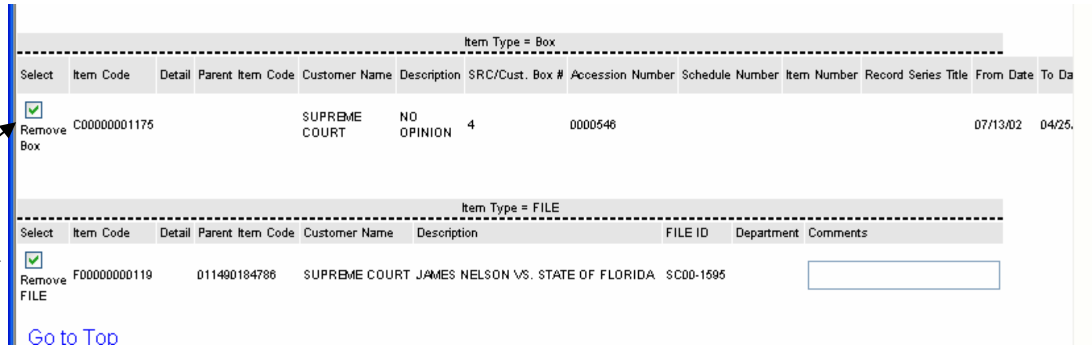
- **Reference Request** (retrieve) – includes "Request Box," "Request File," and "Add File."



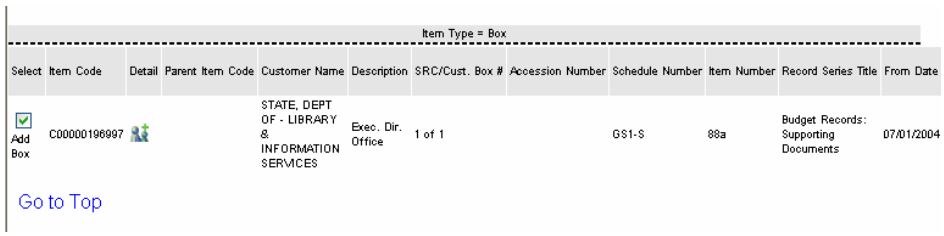
- **Refile** – includes "Return Box" and "Return File."



- **Permanent Removal** (remove) – includes “Remove Box” and “Remove File.”

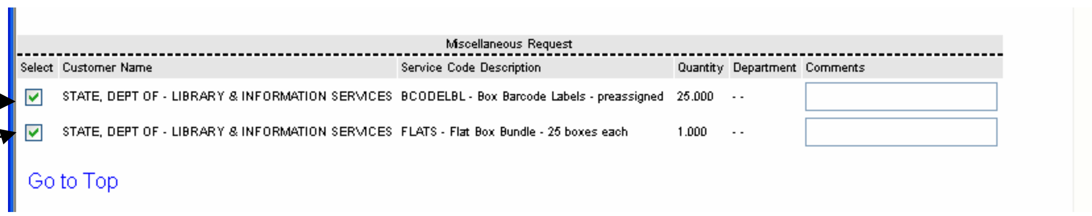


- **New Accession** – includes “Add Box.”

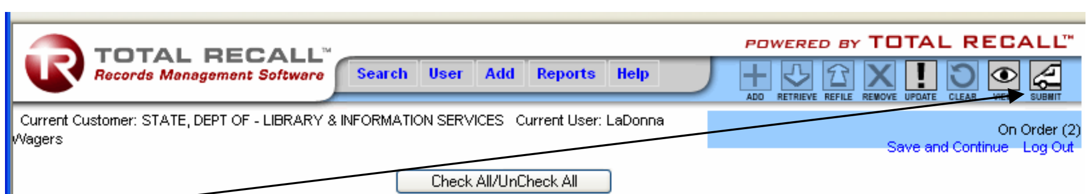


OR

- **Miscellaneous** – includes Barcode Labels and FLATS.



Once you have viewed your order to make sure it is correct, press:

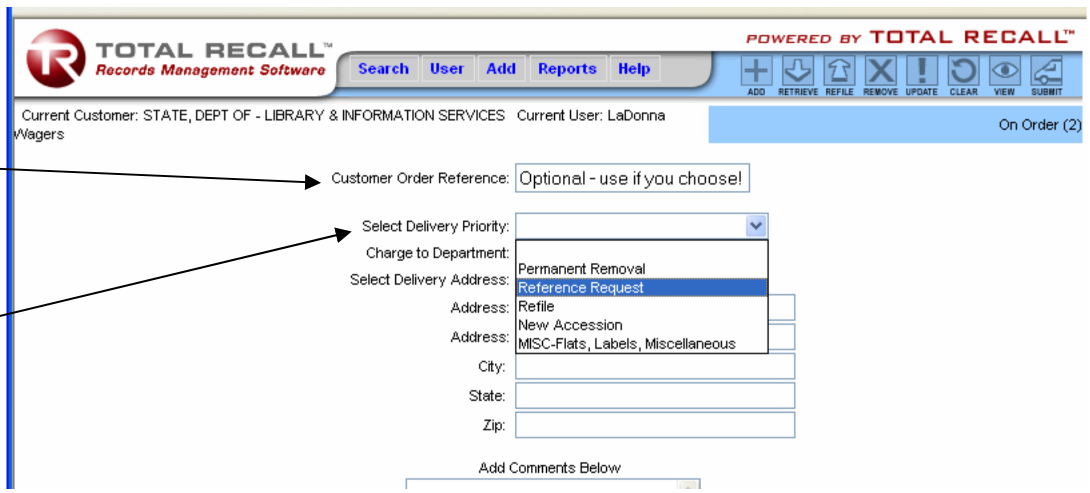


from the **Menu Action Bar**.

The **On Order screen** will be displayed.

Customer Order Reference can be left blank or used to make a note for yourself.

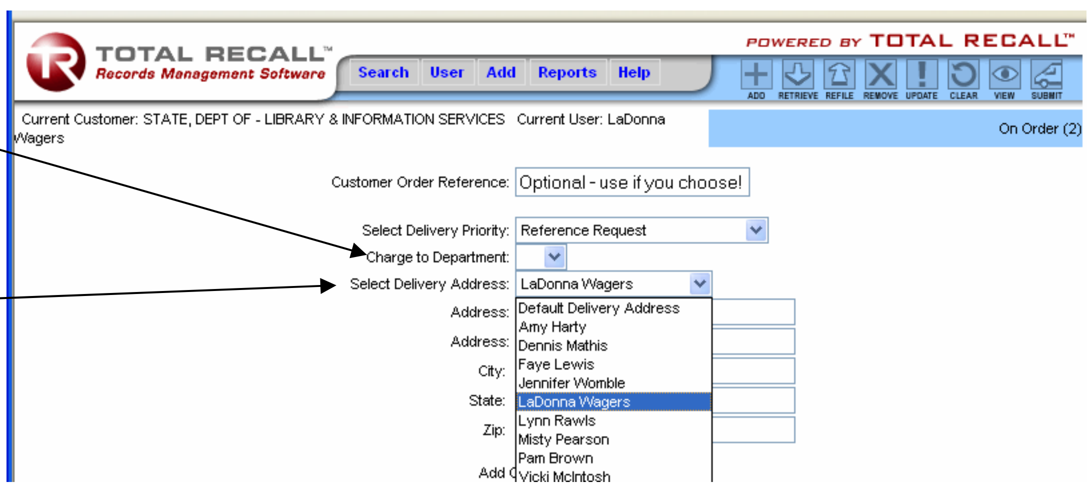
Select Delivery Priority from the dropdown menu. This selection must match the type of service you are requesting.



Make sure the **Delivery Address** is correct. If the correct delivery address is not listed in the dropdown list, enter the correct address in the **Comments** field below.

Select your Department, if applicable.

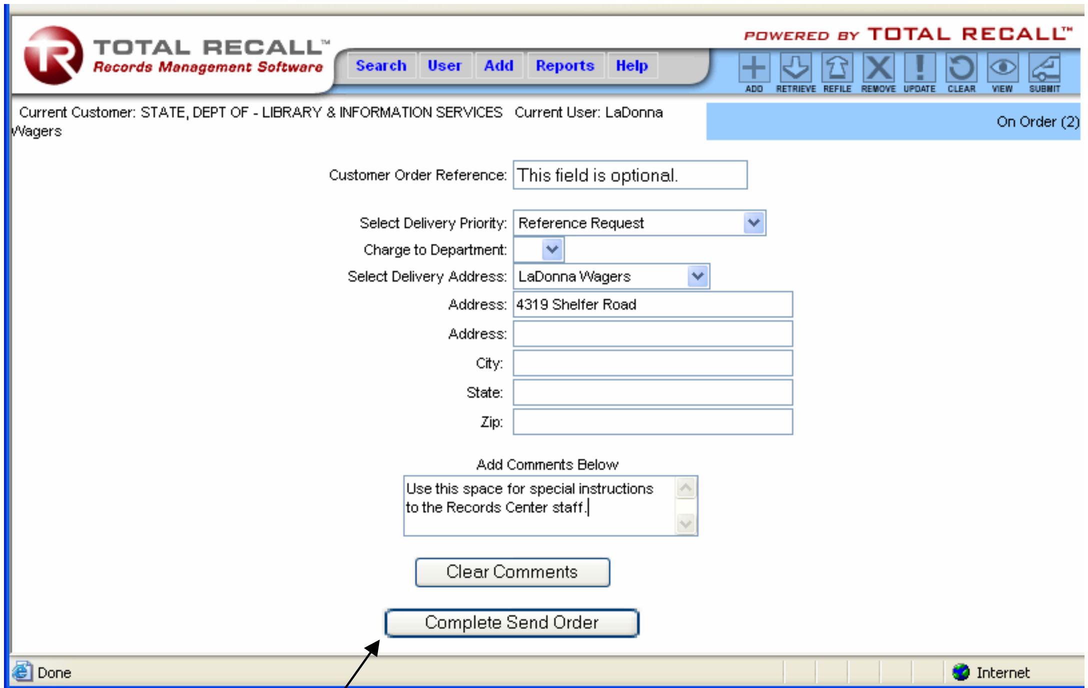
Select Delivery Address is used to select a different address, if necessary. Select from the choices on the dropdown.



Comments can be

used to:

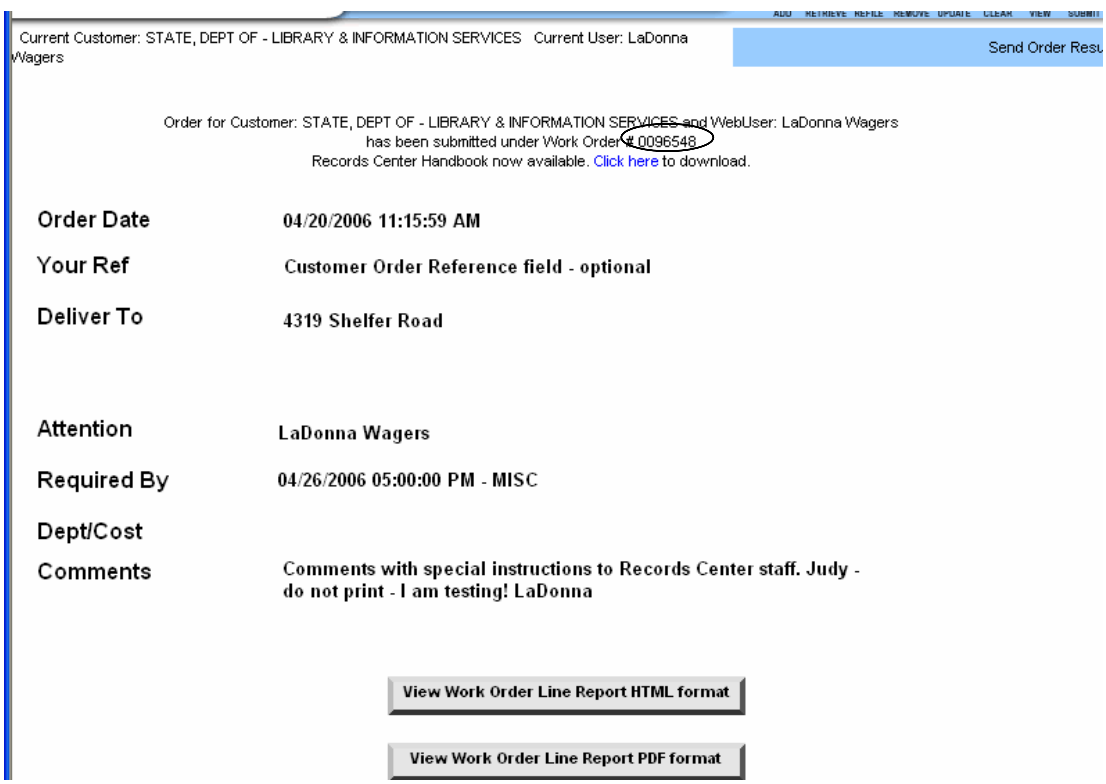
- provide the **correct delivery address** if not listed in the dropdown choices,
- indicate if you would like to **pickup the items** rather than have them delivered,
- indicate a **rush order** (you must also call the Records Center and speak with someone for rush orders), and
- specify other **special instructions**.



To send your order, click the **<Complete Send Order>** button.

After your order is sent, the **Send Order Results** screen will display.

This screen includes the **Work Order number** and links to view the **Work Order Line Report** in HTML format and PDF format.



Work Order Line Report in HTML format.

Work Order Line Report for Work Order #: 0096548

Priority: MISC **Due Date: 4/26/2006 5:00:00 PM**
Requested By: LaDonna Wagers

Item Code: Service: 25 - Box Barcode Labels - preassigned
Requested For: LaDonna Wagers

4/20/2006 11:25:40 AM **Page 1 of 1**

The Work Order Line Report shows the items on the order and the work order Due Date, which is the date by which the request will be completed.

It is a good idea to print this page for future reference.

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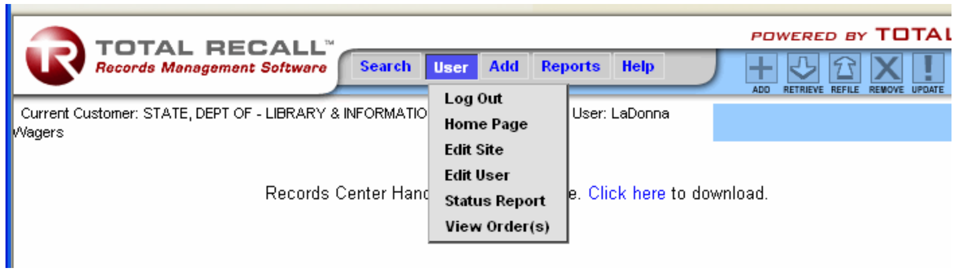
CHAPTER 8 – The User Menu Options

The User menu contains the five options specifically related to User activities. The options are Log Out, Home Page, Edit Site, Edit User, Status Report, and View Order(s).

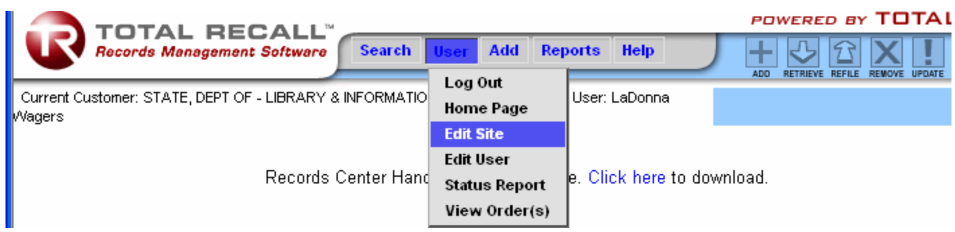


Log Out

The “Log Out” option allows the current user to sign out or log out of the Web module. Any items that have been placed on the user’s order but have not been sent will remain on the order and can be sent or removed from the order later. It should be noted that orders that have not been sent do not affect the status of any items in the agency’s inventory.

Home Page

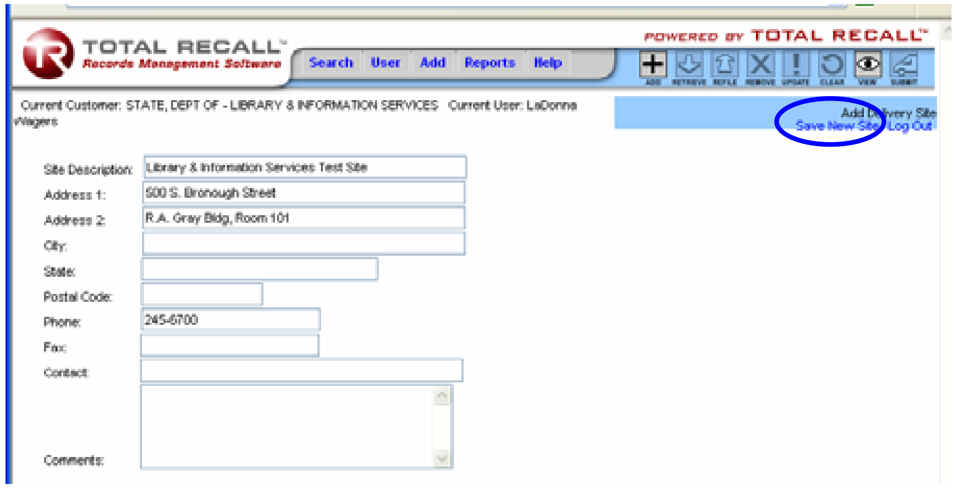
The “Home Page” option brings the screen back to the original screen that is displayed when the user first logs in.

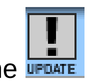


Edit Site

The “Edit Site” option allows **Authorized Users** to add, edit, or delete delivery addresses and to add special instructions pertaining to specific delivery locations.

From this screen, you may “Add” a new delivery site or edit an existing site. To “Add” a delivery site, click on the **<Add New Site>** button. The illustration below represents a new delivery site with a new contact person. Once you have completed the information for the new site, click the **<Save New Site>** button.



To edit a delivery site, select the site by clicking on the site to be updated or deleted. The editable data will appear at the **bottom** of the screen and you can input the new information. To save the changes, click the  button.

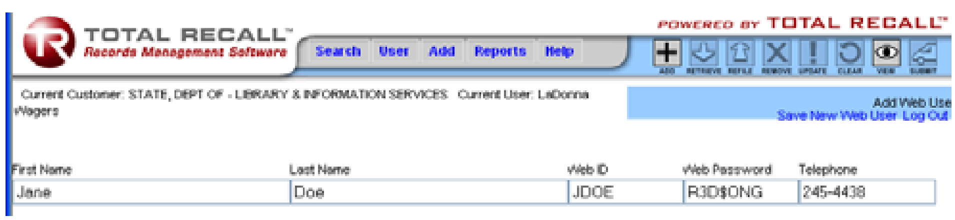
Edit User

The "Edit User" option provides Authorized Users the ability to add new or edit existing users. The agency RMLO will want to consider security issues related to their agency policy and procedure when setting up users. It is very important to remember that a user has the ability to affect inventory. This means that they can have inventory delivered, refiled, or removed.

The Total Recall™ Web module software has extensive security features that allow several levels of options for users. These options will be reviewed in detail. To add, edit, or delete a user, click on the **<Edit User>** button.

In this example, there are several users set up on this account. To edit a user, click on the user name that needs to be edited. To add another user to the account, click on the **<Add New Web User>** button.

With this example, we will illustrate how to add a new user.



WEB ID: The Web ID will be the user's "User ID" when logging into the Total Recall Web module.

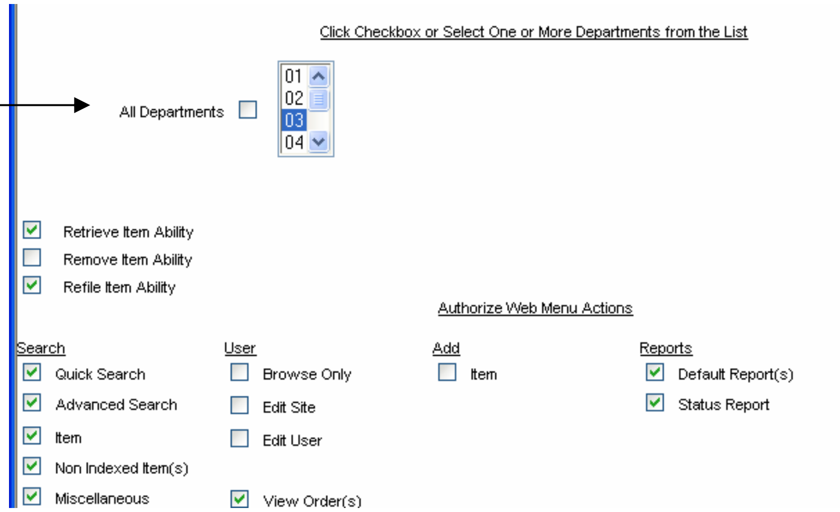
We have entered a new User, Jane Doe. The **Web ID** and **Web Password** are then entered. The password should not be easy to guess. The **Telephone** number should always be entered so that the Records Center can contact the user about his or her orders when needed.

Jane Doe will need to be assigned security permissions within the system.

If your agency account is departmentalized, the user can be assigned to all departments by checking “All Departments,” or to individual departments by selecting the department.

The options listed here give the user the ability to retrieve, remove, and refile boxes or files.

The options listed here give the user access to the corresponding menu options.

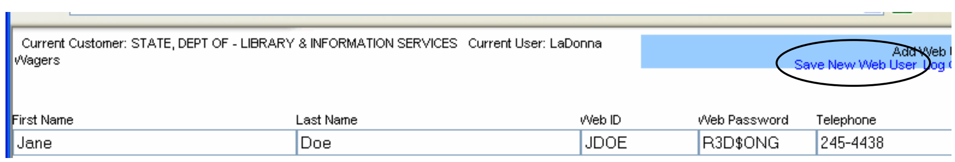


Note: Checking the “**Browse Only**” option will restrict the user to searching only. Even if other user options are checked, the user will not be allowed to retrieve, refile, or remove items or add items to the order.

Let’s assume that Jane Doe is a new employee with limited training in Records Management. We have given Jane the ability to Retrieve and Refile items, but not to Remove items. She has access to all the Search menu options. Under the “User” menu, Jane is only given the option to view her orders. Jane cannot Add items, but has access to the Default Reports and the Status Report.

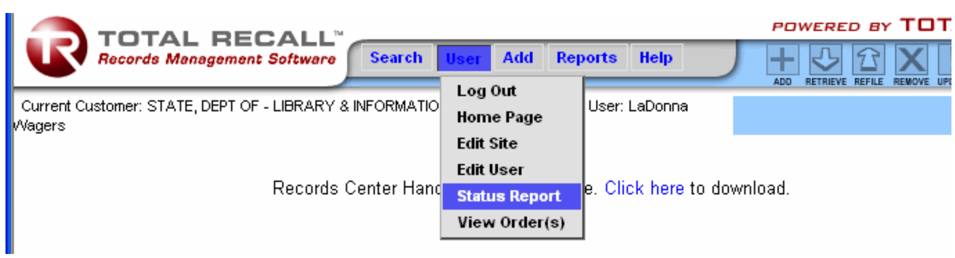
As Jane receives additional training, the RMLO (Authorized User) may want Jane to start adding inventory to the Records Center. At that time, the RMLO would edit Jane’s User Account and check the “Add” item option.

To add the user, click **<Save New Web User>**.

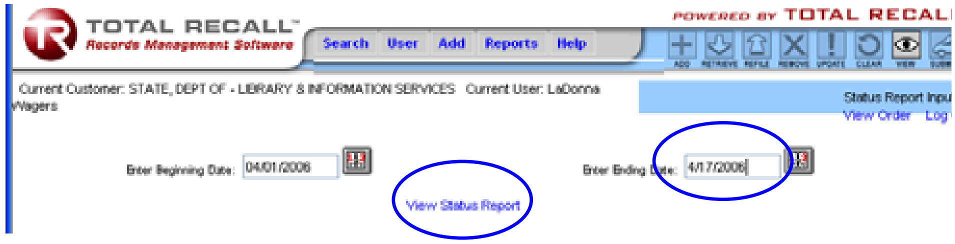


Status Report

The “Status Report” option shows agency orders that have been sent to the Records Center, based on the date parameters entered.



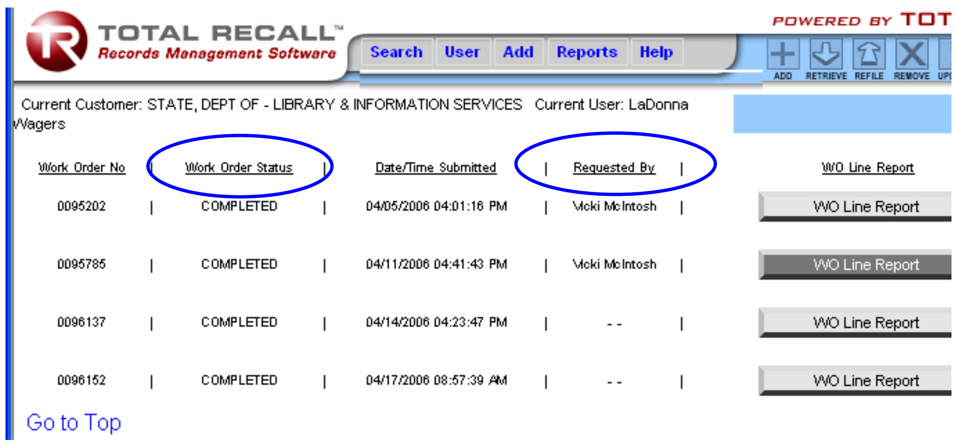
Selecting the "Status Report" option brings up the date parameters.



The Beginning Date defaults to the first day of the current month and the Ending Date must be entered. If you are looking for a particular work order, the date the work order was sent needs to fall within the date range entered.

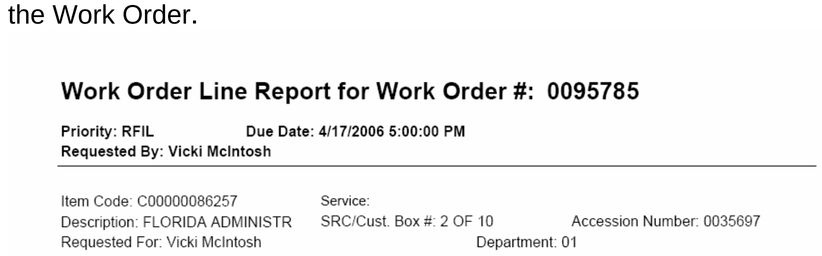
After entering a date range, click the **<View Status Report>** button to see the list of work orders.

The "Status Report Output" displays the work order number, the work order status, the date and time submitted to the Records Center, who requested the order, and a **<WO Line Report>** button.



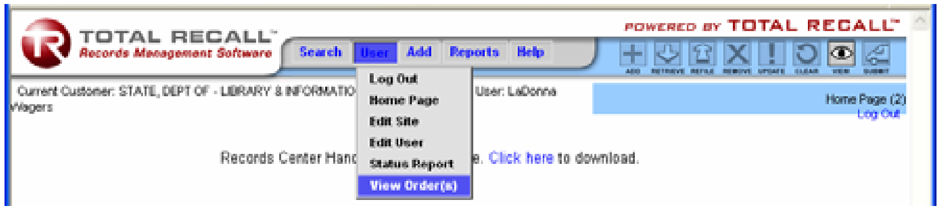
The "Work Order Status" displays the current status of the order. A status of WEB indicates the order was sent by a user from the Web module and has not yet been looked at. PENDING and PRINTED indicate the work order is in process. A status of COMPLETED means the work order is complete but has not yet been billed. BILLED means the work order is complete and has been billed. Click on the **<WO Line Report>** button to see detail information about the Work Order.

The **Work Order Line Report** shows the work order details.

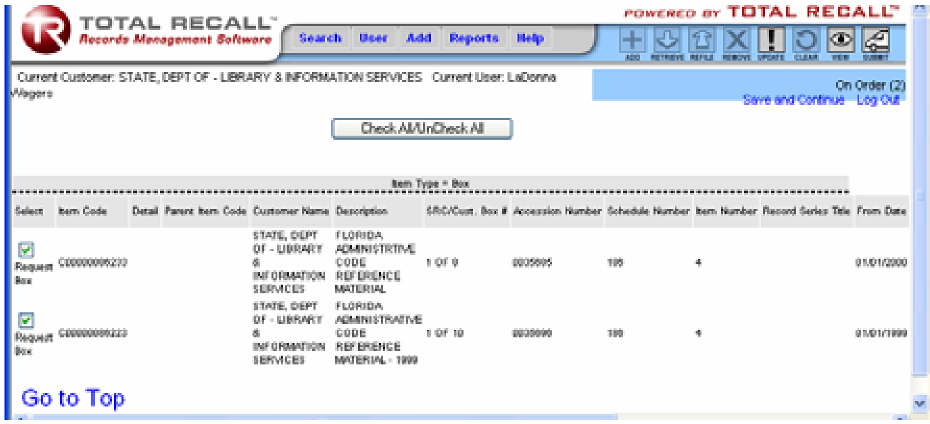


The Work Order Number is displayed in the heading. "Priority: RFIL" indicates this is an order to refile an item. "Due Date" is the date by which the work order should be completed, and "Requested By:" shows who submitted the order. Information about the item being refiled is displayed below the horizontal line.

View Order(s)



The “View Order(s)” menu option allows the user to view the current order.



Removing items from your order.

To delete or remove items from the current order, uncheck the “Select” box and click the **<Save and Continue>** button. Once you have verified the order, it can be sent by pressing the  button. See Chapter 7 for more information on sending an order.

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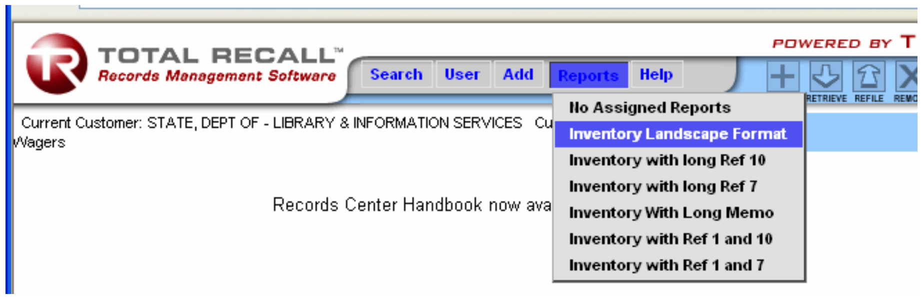
CHAPTER 9 – The Reports Menu

There are several reports available from the Reports menu and they are all run in a similar manner. The “Inventory Landscape Format” report is demonstrated here, as it has the most useful information for the user.

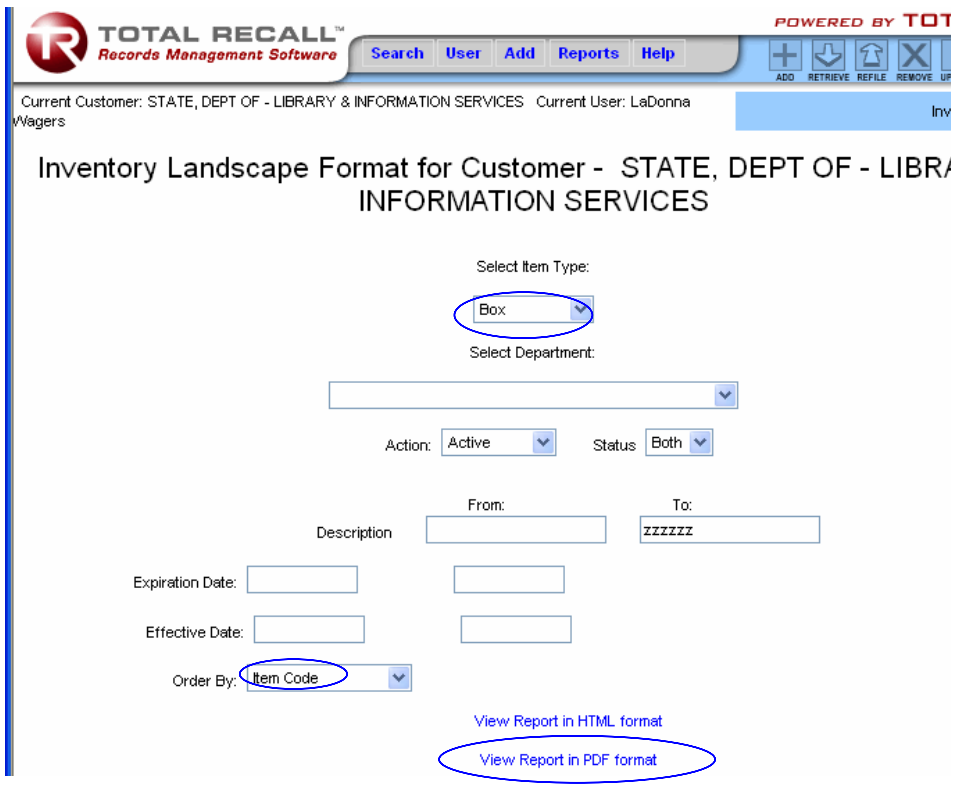
The **Inventory Landscape Format** provides the most useful information for the user.



In this example, we have selected **“Box”** for our “Item Type.” The default “Action” is **“Active.”** This will display all the boxes currently in inventory for the customer. The default sort order (Order By) is “**Item Code**.”

You can select various criteria to run the report, including:

- Department, if applicable
- Active, Destroyed, or Permed Out
- Status of In, Out (retrieved by customer), or Both
- A range for Description
- A range for Expiration Date (date records are eligible for disposal)
- A range for Effective Date (accession date of the records)
- Field to sort by (Order By)
- View report in HTML or PDF format



You can also choose to run the report for items that have a status of “In,” “Out,” or “Both,” or for a range of values in the “Description,” “Expiration Date,” or “Effective Date” fields.

After entering the report criteria, click **<View Report in PDF format>** to see the PDF report.

Once the report criteria is entered, click either <View Report in HTML format> or <View Report in PDF format> to view the report.

Sample **Default Report**.

The PDF report displays the total number of records in the report at the bottom of each page.

4/19/2006 10:36:06 AM

Report Of Items In Inventory for Item Type - Box

Bar Code Id	Description	SRC/Cust. Box #	Accession Number	Effective	Expires	Out	Date Out	Checked Out To
910729007068		007068	910729	5/31/1991	6/30/2989	No		
Acrcdcntr: 01								
910729007069		007069	910729	5/31/1991	6/30/2989	No		
Acrcdcntr: 01								
910729007070		007070	910729	5/31/1991	6/30/2989	No		
Acrcdcntr: 01								
910729007071		007071	910729	5/31/1991	6/30/2989	No		
Acrcdcntr: 01								
910729007072		007072	910729	5/31/1991	6/30/2989	No		
Acrcdcntr: 01								
990573165987		165987	990573	9/17/1998	9/17/2008	No		
Acrcdcntr: 01								
990573165988		165988	990573	9/17/1998	9/17/2008	No		
Acrcdcntr: 01								
990573165989		165989	990573	9/17/1998	9/17/2008	No		
Acrcdcntr: 01								

Number of records shown on this report: 552

Page 1 of 55

C H A P T E R 10 – Help

WEB HELP

The "Web Help" feature is currently under construction by DHS Worldwide, the Total Recall vendor. The Records Center technical staff will advise when the "Help" feature becomes available.

In the interim, please call the Records Management Program at 850.245.6750 for individual assistance.

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APPENDIX A – GLOSSARY OF TERMS

COMMENTS – When sending an order, this field allows a user to indicate comments relating to the order. These comments can be for the agency or directed to SRC staff.

CUSTOMER ORDER REFERENCE – When sending an order, this is an **optional** field that can be used for comments or notes for the user.

DELIVERY ADDRESS – When sending an order, the default delivery address is displayed here. The user can change the address by selecting from the dropdown list. If the user's address is not listed, the correct address should be entered in the Comments field, displayed below the Delivery Address.

DELIVERY PRIORITY – When sending an order, the user MUST select the Delivery Priority that corresponds to the requested service (Reference Request, Refile, Permanent Removal, etc.). Otherwise, the order will not go through and will have to be resubmitted. Delivery Priority MUST be selected as follows:

MISC-Flats, Labels, Miscellaneous – select when ordering Flats or Barcode Labels
Permanent Removal – select when permanently withdrawing a box or file
Reference Request – select when requesting a box or file
Refile – select when refiling a box or file
New Accession – select when adding new items to inventory

DEPARTMENT – This is used when items are assigned to a specific department within the agency.

DESCRIPTION (for boxes) – This is used to describe the records in a box. It is limited to 100 characters in Total Recall.

DESCRIPTION (for files) – Description and File ID are used to describe a file when the file is Retrieved for the first time. The information entered into these fields should be the same as the file folder label so that when Records Center staff open the box they can find the file.

EDIT SITE (available from the "User" menu) – The "Edit Site" option allows the user to change the user's delivery site where records are to be picked up or delivered.

EDIT USER (available from the "User" menu) – The "Edit User" option allows the user to change user account information. Access to this menu option is generally restricted to Records Management Liaison Officers (RMLOs).

FILE ID (for files) – File ID and Description are used to describe a file when the file is Retrieved for the first time. The information entered into these fields should be the same as the file folder label so that when Records Center staff open the box they can find the file.

FLATS – These are flat boxes and they come in bundles of 25, so one (1) FLAT equals 25 boxes.

ITEM CODE (for boxes) – The 12-digit barcode number that identifies an agency's box (begins with a "C" for carton). For inventory accessioned into the Records Center prior to December 2, 2002, the numeric makeup of the Item Code is the six-digit accession number plus the six-digit SRC number, to create a 12-digit number, as illustrated below:

Item Code Formula for inventory residing in the SRC prior to 12/02/2002:		
	ACCESSION NUMBER +	SRC NUMBER
Example:	02-435	3256
Item Code =	020435|003256	

ITEM CODE (for files) – This is the 12-digit barcode number that identifies a file in a box (begins with an "F" for file).

ITEM NUMBER (for boxes) – The Item Number associated with the Records Series Title published in the General Schedule or the item number of the individual agency schedule (e.g., 17a or 1a).

PARENT ITEM CODE (for files) – A file's "parent" is the box in which the file is located. The file's Parent Item Code is the Item Code of the box in which the file is located.

RECORDS SERIES TITLE (for boxes) – The official title of the item published in the General Schedule or the title of the individual agency schedule that identifies the group of records in the box (e.g., "Correspondence & Memoranda: Administrative" or the title of the individual agency schedule).

RECORDS STORAGE BOX LABEL – This label must be completed and placed on new boxes being accessioned into the Records Center. The current version of the label is available from our Web site at http://dlis.dos.state.fl.us/recordsmanagers (under "Publications and Forms").

REFILE – This "action" is used to request boxes/files to be picked up from the customer and returned to the Records Center.

REMOVE – This "action" is used to request a Permanent Withdrawal of boxes/files from the Records Center. A permanent withdrawal allows an agency to PERMANENTLY REMOVE inventory. Once the inventory is removed, the same Item Code (Barcode) will not be allowed back into the Records Center's inventory. If an agency would like to return records to inventory that have been "Removed," the agency will need to re-accession the box(es).

RETRIEVE – This "action" is used to request boxes/files to be delivered to the customer.

SAVE AND CONTINUE button – Used to remove items that have been added to the user's order but have not been sent yet.

SCHEDULE NUMBER (for boxes) – The Retention Schedule number being cited to identify records to be transferred to the Records Center (e.g., GS1-SL or an individual agency schedule number).

SRC/CUST. BOX # (for boxes) – This is the SRC Number for old boxes (prior to 12/02/2002) and the customer's box number for new boxes.

STATUS REPORT (available from the "User" menu) – The "Status Report" option shows the status of customer orders sent to the Records Center.

APPENDIX B – PREPARING RECORDS FOR TRANSFER

Please follow the guidelines below when preparing records for transfer to the Florida Records Storage Center. Failure to comply with these guidelines will result in the delay of records being transferred to the center.

Storage Cartons:

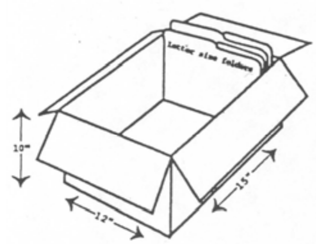
- Standard cartons may be ordered from the records center. The cartons come in bundles of 25 flat boxes. This is referred to as one flat.
- Standard cartons must have the following dimensions: 10 inches high by 12 inches wide by 15 inches long. They will hold up to one cubic foot of letter or legal size records.

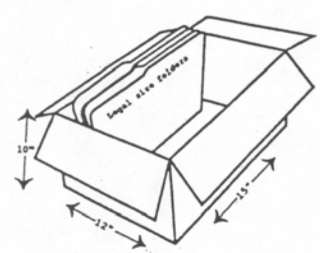
Preparing Cartons for Records:

- Open the flattened box so that it forms a cube.
  - For the bottom, tuck short flaps in.
  - Fold long flaps over, completely covering the short flaps.
  - Tape along the seam where the two long flaps come together. Extend tape over each end approximately 1½ inches. Use 2”-3” wide clear plastic heavy-duty commercial packing tape.

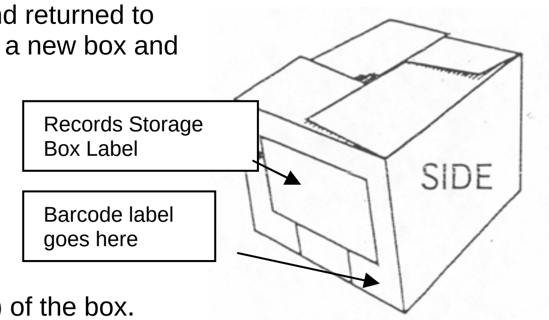
Packing:

- Pack only one record series per box.
- Keep files in their original folders. Do not put loose paper in the box. All papers must be in folders.
- Keep filing order intact. If there is no logical order that can be used for retrieving files, the records must be put in order before packing boxes. Records Center staff must be able to quickly and easily locate a file within a box.
- Pack folders upright with letter size folders facing the 12-inch side or legal size folders facing the 15-inch side (see figures to the right).
- Do not over-pack or force files into a box. It should be easy to slide a hand into the box to retrieve a file.
- If it is possible that information will be added to a file, leave room for growth in the box. Once a file is too large to be put back in the original space, it will be permanently withdrawn and returned to your agency. If this happens, the file will have to be placed in a new box and re-accessioned.





When packing is complete:



- Tuck the flaps alternately over each other. Do not tape shut.
- Fill out a records storage box label (available at http://dlis.dos.state.fl.us/recordsmgmt/publications.cfm).
- Type all available information on the label.
- Place the records storage box label on the front (12-inch side) of the box. Completely seal all four sides of the label with packing tape.
- Place a customer barcode label in the lower right-hand corner of the box, not on top of the records storage box label (use the Total Recall Web Module to order pre-assigned barcode labels).
- Separate the boxes by work order (if they were entered into Total Recall as separate orders) and then stack the boxes for each work order in barcode number order (from lowest to highest) for pickup. See the diagram to the right for stacking order.

5	10	
4	9	
3	8	etc.
2	7	12
1	6	11

Stack boxes in barcode number order with lowest barcode on the lower left as illustrated.

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APPENDIX C – RECORDS STORAGE BOX LABELS

A Records Storage Box Label (shown on the next page) must be completed and placed on new boxes being sent to the Records Center for storage.

AGENCY NAME & ADDRESS	CUSTOMER BOX NUMBER (if applicable)
Florida	
RETENTION SCHEDULE NUMBER: **ITEM NUMBER:** **RECORD SERIES TITLE:**	**FROM DATE:** / / mm dd yyyy **TO DATE:** / / mm dd yyyy

DESCRIPTION OF RECORDS (When describing records, avoid vague terms such as "Miscellaneous." If describing a person's files, include the person's position title. For example, rather than saying "Bob Smith's Files," use "Director of Marketing Bob Smith's Promotion Planning Files" instead. Make a note of the range of records in the box for future reference.) :

STATE OF FLORIDA
DEPARTMENT OF STATE
Division of Library and
Information Services
Form LS5E200 R 09-2004

Records Storage Box Label

AGENCY NAME & ADDRESS	CUSTOMER BOX NUMBER (if applicable)
Florida	
RETENTION SCHEDULE NUMBER: **ITEM NUMBER:** **RECORD SERIES TITLE:**	**FROM DATE:** / / mm dd yyyy **TO DATE:** / / mm dd yyyy

DESCRIPTION OF RECORDS (When describing records, avoid vague terms such as "Miscellaneous." If describing a person's files, include the person's position title. For example, rather than saying "Bob Smith's Files," use "Director of Marketing Bob Smith's Promotion Planning Files" instead. Make a note of the range of records in the box for future reference.) :

STATE OF FLORIDA
DEPARTMENT OF STATE
Division of Library and
Information Services
Form LS5E200 R 09-2004

Records Storage Box Label

APPENDIX D – BOX INFORMATION IN TOTAL RECALL

Sample Box Descriptions: Correspondence Files

Box 1	Secretary's Office Correspondence	[1994-1997]
Box 2	Secretary's Office Correspondence	[1998-2000]
Box 3	Central Correspondence Files	[1994-1995]
Box 4	Central Correspondence Files	[1996-1997]
Box 5	Central Correspondence Files	[1998-2000]

Box 1	Commissioner John Johnson's Correspondence	[1988-1995]
Box 2	Commissioner John Johnson's Correspondence	[1995-2002]
Box 3	Assistant Secretary Jack Jackson's Correspondence	[1988-1991]
Box 4	Assistant Secretary Jack Jackson's Correspondence	[1992-1995]
Box 5	Assistant Secretary Jack Jackson's Correspondence	[1996-1999]
Box 6	Assistant Secretary Jack Jackson's Correspondence	[2000-2003]

Box 1	Commissioner's Office Correspondence A-K
Box 2	Commissioner's Office Correspondence L-Z
Box 3	Bureau of Administration Correspondence A-K
Box 4	Bureau of Administration Correspondence L-Z
Box 5	Bureau of Research Correspondence
Box 6	Bureau of Finance and Accounting Correspondence

Box 1	Correspondence with state agencies
Box 2	Correspondence with vendors
Box 3	Routine Public Inquiry Correspondence
Box 4	Public Records Request Correspondence

Box 1	Secretary Bubba Burke Correspondence
Box 2	Assistant Secretary for Important Matters Fred Frick Correspondence
Box 3	Assistant Secretary for Less Important Matters Doug Dickle Correspondence
Box 4	Deputy Secretary for Other Stuff Sally Smith Correspondence
Box 5	Assistant Deputy Secretary for Whatever is Left Andy Anderson Correspondence

Sample Box Descriptions: Grant Files

Grants: USC Title 7 Water-Waste Facilities/Rural Community Advancement/Sustainable Agr Research & Educ

Grants: USC Title 20 Improve Elem./Secondary Schools/Violent Crimes v. Women on Campus/Community Dev

Grants: Historical Records Program Development, s. 999.88(1)(a)7., F.S.

Terms/phrases to avoid in box descriptions:

- "Miscellaneous"
- "Other"
- "etc." (except when Total Recall space limitations prevent further description)
- Office jargon

  "107s" – instead, use "Disposition Request Documents (107 Forms)"
  "Blue Forms" – instead, use "Case Worker Assignment Forms"

- Acronyms/abbreviations (except when providing a legal citation, e.g. 's119.07, F.S.')

  "Closed HHA" – instead, use "Closed Home Health Agency Files"
  "JTPA Payment Report Books 1-3, BLSH" (what in the world is BLSH???)
  "CST" – instead, use "Communications Services Tax"

- General schedule item titles that do not indicate record content

  "Administrative Support Records" [GS1-SL #3]
  "Administrative Convenience Records" [GS1-SL #2]

  Instead, indicate record type(s)/subject content, such as:

  "Internet article printout reference files"
  "Employee circulation copies of interoffice memoranda"

  Avoid using schedules GS1-SL #2 and #3 (Admin. Convenience and Admin. Support) except as a last resort. Look for general schedule items that more specifically describe the content/purpose of the records, or establish individual agency schedules that do so. When these schedules are appropriate for your records, clearly indicate the type and subject content of the records in your box descriptions.

WHY?

1) Ensures that your agency can determine what is in each box, enabling you to request the correct box when records are needed in your office.
2) Enables us to verify upon receipt of work order that the retention schedule you cite is the appropriate schedule for the records being stored.
3) Enables us to identify records that might have archival value (permanent historical research value) for potential transfer to the State Archives.

Entering Dates for Boxes:

From date => **EARLIEST** date of records contained in the box

To date => **LATEST** date of records contained in the box

Follow this guideline even if records in box are filed in reverse chronological order.

WHY?

Total Recall calculates the date records are eligible for disposition from the "To" date. A box of records from 2002-2005 with a 3 year retention will be eligible for disposition in 2008. However, if you enter "12/31/2002" in the "To" field for that box, Total Recall will calculate the eligibility date as 12/31/2005, so records could be destroyed prematurely.

Entering Retention Schedule Numbers and Titles:

1) If using a general records schedule, make sure you are using a current, valid schedule number and item number. See our Web site at http://dlis.dos.state.fl.us/RecordsManagers for current general records schedules and recent updates.

For instance, ***do not*** use:	"GS1-S Item 5a Applications: Leave Of Absence"
Instead, use:	"GS1-SL Item 116a Attendance and Leave Records"

2) Enter the Record Series Title exactly as given in the established retention schedule.

For instance, ***do not*** use:	"Projects"
Instead, use:	"Project Files: Capital Improvement"
Do not use:	"Accounts"
Instead, use:	"Accounts Receivable: Supporting Documents"