

---

**RSWeb®.NET**

# **Client User Guide**

**O'Neil Software, Inc.**



**Corporate Headquarters  
O'Neil Software, Inc.**

11 Cushing, Suite 100  
Irvine, California 92618  
949-458-1234  
Fax: 949-206-6949  
E-Mail: [sales@oneilsoft.com](mailto:sales@oneilsoft.com)  
[www.oneilsoft.com](http://www.oneilsoft.com)

**European Office  
O'Neil Software, Ltd.**

6 Joplin Court  
Crown Hill  
Milton Keynes  
MK8 0JP, United Kingdom  
+44 (0) 1908 635320  
Fax: +44 (0)1908 635326  
E-Mail: [EUsales@oneilsoft.com](mailto:EUsales@oneilsoft.com)

**AustralAsia Office  
O'Neil AustralAsia Pty Ltd.**

Ground Floor, Oxley House  
25 Donkin Street  
South Brisbane QLD 4101  
Australia  
[61] 7 3255 1333  
Fax: [61] 7 3255 1444  
E-Mail: [AUsales@oneilsoft.com](mailto:AUsales@oneilsoft.com)

## Warranty

The Company warrants to the Licensee that for a period of twelve (12) months following the Licensee's acceptance ("**Initial Warranty Period**"), the Software Technology will substantially conform to the Documentation, when properly installed and used with the Designated System and at the Designated Location (the "**Limited Warranty**").

The Company's sole and exclusive liability and the Licensee's sole and exclusive remedy under the Limited Warranty shall be, at the Company's election, (i) to provide program services to attempt, through commercially reasonable efforts, to correct any material program defects discovered within the applicable warranty period or (ii) to replace the defective Software Technology. The above remedies are available only if the Company is promptly notified in writing, within the Limited Warranty period. In the event Company is unable to accomplish either of the above within thirty (30) days from its receipt of notification of the breach of the Limited Warranty, or any mutually agreed extension thereof, Licensee may terminate the license for the defective portion of the Software Technology (or for all of the Software Technology if the defective portion is an indispensable part of the Software Technology), and Company shall refund to Licensee all License Fees paid by Licensee to Company relating to the defective portion of the Software Technology (or to all the Software Technology, if the license to all of the Software Technology is terminated) for the period of time during which the Software Technology failed to conform to the Limited Warranty. The remedies set forth in this Section shall constitute Company's sole obligation, and Licensee's sole remedy, for any breach by Company of the Limited Warranty.

The warranty shall be void if the failure of the Software Technology to conform is caused by (i) the use or operation of any Software Technology with equipment other than the Designated System or with an application or in an environment other than that intended or recommended by the Company as expressly stated in the Documentation, or (ii) modifications to any Software Technology made by any person or entity other than the Company.

**DISCLAIMER OF ANY OTHER WARRANTY.** EXCEPT FOR THE EXPRESS WARRANTIES SET FORTH IN THIS SECTION 9, COMPANY PROVIDES NO WARRANTIES, EITHER EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE, WITH RESPECT TO ANY SOFTWARE TECHNOLOGY OR DOCUMENTATION, AND COMPANY SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT.

## Copyright

RS-SQL® and RSWeb® are registered trademarks of O'Neil Software, Inc. All other brand and product names are trademarks or registered trademarks of their respective companies.

This manual and any examples contained herein are provided "as is" and are subject to change without notice. O'Neil Software, Inc. or its affiliates makes no warranty of any kind with regard to this manual, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. O'Neil Software, Inc. or its affiliates shall not be liable for any errors or for incidental or consequential damages in connection with the furnishing, performance, or use of this manual or the examples herein. This guide is copyrighted. All rights are reserved. This guide may not, in whole or in part, be reproduced, translated, stored in a retrieval system or transmitted, in any form or by any means, electronic, mechanical, photographic, or otherwise, without the prior written consent of O'NEIL SOFTWARE, INC.

© COPYRIGHT O'NEIL SOFTWARE, INC., 2006-2012

April 2012

# Contents

<b>RSWeb Overview</b>	<b>1</b>
Overview .....	1
Logging In .....	1
Home .....	3
Inventory .....	3
Order.....	3
Time Out Feature.....	3
Logout .....	4
 <b>Home</b>	 <b>5</b>
Introduction .....	5
Data Entry Form Preferences.....	5
Change Password.....	6
User Admin.....	6
Add a User.....	7
Edit an Existing User.....	10
Global Edit Existing Users .....	11
Delete an Existing User .....	12
Add a Model User .....	12
Global Edit Model Users .....	13
Function Access .....	14
Account Access .....	15
Reports .....	16
Cart Access/Global Edit Cart Access .....	17
Print / Export .....	18
 <b>Inventory</b>	 <b>19</b>
Introduction .....	19
Menu Options .....	19
Options .....	20
Results .....	26
Search.....	28
Containers .....	30
Add New Containers .....	31
Search for Existing Containers .....	32
Edit Existing Containers.....	32
Global Edit Containers .....	33
Retention Information .....	33
Filefolders .....	35
Add New Filefolders .....	36
Search for Existing Filefolders .....	36
Edit Existing Filefolders.....	36
Global Edit Filefolders .....	37

Tapes.....	38
Add New Tapes .....	39
Search for Existing Tapes.....	39
Edit Existing Tapes.....	39
Global Edit Tapes .....	40
Documents .....	41
Add New Documents .....	41
Edit Existing Documents .....	43
Global Edit Documents .....	43
Add Document Imaging Requests to Cart .....	44
Add FF/Container to Cart.....	45
View Keywords .....	45
List Images .....	46
View Images .....	46
Image .....	49
Edit .....	49
Delete .....	50
View Image .....	51
Print .....	54

## **Order 55**

Introduction .....	55
Getting Started .....	55
Cart .....	55
Add Items to Cart.....	56
Items .....	57
Bulk Items .....	63
Materials .....	64
Services .....	64
Reports .....	65
Document Imaging Request .....	68
Edit Items in Cart.....	70
View Details of Items in Cart .....	71
Create Order/Workorder.....	71
Create an Order .....	72
Create a Workorder .....	74
Remove Items from Cart.....	78
Remove All Rows .....	78
Remove Current Row .....	78
Remove Selected Rows .....	78
Order Status .....	79
Searching by Batch Number Range.....	80
Searching by Tracking Number Range.....	80
Searching by Workorder Number Range .....	81
Searching by Date Range .....	81
Searching by Status .....	81
Searching by Ordered By .....	82
Combining Search Criteria .....	82
Search Results .....	82
Retrieving a Web Report .....	83
Order Express .....	85
I Know Exactly What I Want .....	86
Search for What I Want.....	87
The Item I Want is Not Currently Registered.....	95
Image Express.....	99





# RSWeb Overview

---

## Overview

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

---

**NOTE:** RSWeb can be accessed by any computer using Microsoft Internet Explorer 6.0 or above.

---

## Logging In

Security is important to you and your records. RSWeb respects that and requires that everyone who logs in have a current User Name and Password. These names and passwords are set up through your record center.



Enter your User Name and Password in the appropriate fields.

If the Remember Me check box is selected and the login is successful, the User Name is remembered the next time the login screen is opened. The Remember Me check box remains checked.

If the Remember Me check box is cleared, and the login is successful, the User Name field will be blank the next time the login screen is opened.

If you clear the fields, but do not login as a different user, the last User Name logged in will appear the next time the login screen is opened. If the last user logged in goes 14 days without logging in again, the Remember Me option expires and the User Name field will be blank.

If more than one language is available, click the drop down arrow next to the language field to select the desired language. Click the **Login** button.

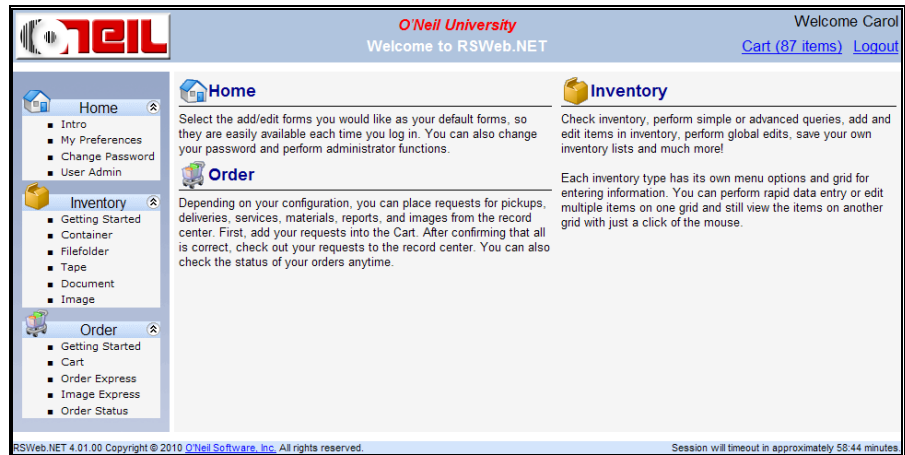
If the Terms and Conditions feature has been set up by your record center, when you enter your User Name and Password and click **Login**, the **Terms and Conditions** page appears.

After you have reviewed the Terms and Conditions, select the Accept Terms and Conditions check box, and click **Continue**. You will be taken to the **Home** page. Once you have accepted the Terms and Conditions, you will not be asked again the next time you log in.

If you do not accept the Terms and Conditions, click **Do not accept**. You will be taken back to the **Login** page. You will not be able to log in until you accept the Terms and Conditions.

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





The welcome message at the top right corner of the screen uses your first name. The tool tip of the welcome message displays your user code and also indicates if you are a web administrator.

The cart link in the top right corner shows the number of items in your cart and provides a quick navigation to the **Cart** page.

## Home

From the **Home** menu, you can read an introduction of RSWeb, determine your default forms for data entry, and change your password. If your record center has set up a User Administrator, you can also set up new users and determine which areas of RSWeb they can access.

## Inventory

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

## Order

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

## Time Out Feature

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

## Logout

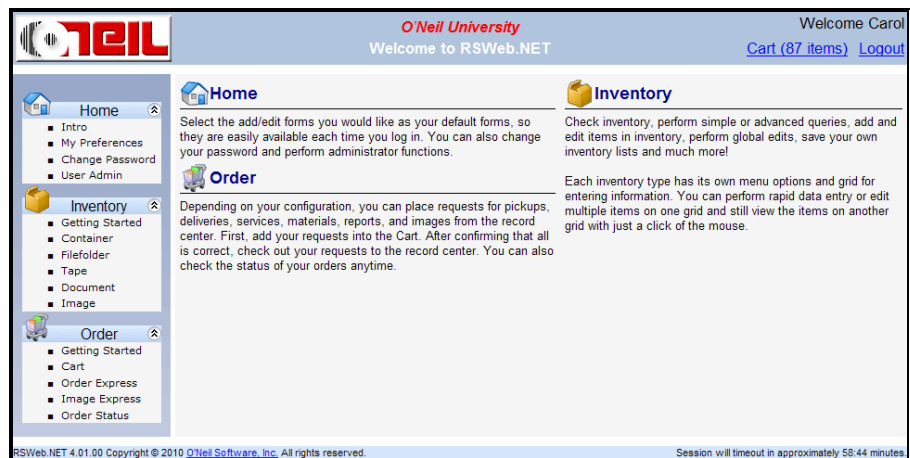
The Logout link in the top right corner allows you to log out of RSWeb when you are finished.

# Home

---

## Introduction

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



---

## Data Entry Form Preferences

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

---

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

---

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

**Irvine Record Center**  
Default Form Configuration

Welcome Carol  
[Cart \(107 items\)](#) [Logout](#)

Please select default forms.

**Container Forms**  
Add: RSWeb.NET Container Add Intermediate \*  
Edit: RSWeb.NET Container Edit Intermediate \*  
Global Edit: RSWeb.NET Container GlobalEdit \*

**Filefolder Forms**  
Add: RSWeb.NET Filefolder Add Intermediate \*  
Edit: RSWeb.NET Filefolder Edit Intermediate \*  
Global Edit: RSWeb.NET Filefolder GlobalEdit \*  
Quick Add: RSWeb.NET Filefolder Add Quick \*

**Tape Forms**  
Add: RSWeb.NET TAPE Add Intermediate \*  
Edit: RSWeb.NET TAPE Edit Intermediate \*  
Global Edit: RSWeb.NET Tape GlobalEdit \*

RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 40:59 minutes

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

## Change Password

The **Change Password** menu option allows you to change your own password.

From the **Home** menu, select **Change Password**.

**Irvine Record Center**  
Change Password

Welcome Carol  
[Logout](#)

User Name: carol  
Old Password:   
New Password:   
Confirm New Password:

RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:29 minutes

The User Name field is automatically populated and grayed out. Enter your Old Password. Next, enter your New Password and type it again to confirm. Click **Change** to change the password.

## User Admin

User Admin allows an administrator (set up by your record center) to do the following:

- add/modify users
- add/assign model users
- deactivate users
- delete users with no activity
- modify function access

- modify account access
- modify available reports

From the **Home** menu, select **User Admin**.

The screenshot shows the 'Irvine Record Center' User Admin interface. The sidebar menu on the left has three main sections: 'Home' (with sub-items: Intro, My Preferences, Change Password, User Admin), 'Inventory' (with sub-items: Getting Started, Container, Filefolder, Tape, Document, Image), and 'Order' (with sub-items: Getting Started, Cart, Order Express, Image Express, Order Status). The 'User Admin' option under 'Home' is selected. The main content area shows a table with columns: User Code, Last Name, First Name, User Status, Item Security, and Item Security. The table is currently empty. The footer shows 'Page 1 of 1' and a session timeout warning.

## Add a User

**NOTE:** Only a Web User Administrator can add new users.

To add a new user, from the **Options** menu, select **Add**.

The screenshot shows the 'Irvine Record Center' User Add interface. The form is divided into several sections:
 

- User Information:** Includes fields for User Code, Password, Confirm New Password, Last Name, First Name, Language (dropdown), User Status (dropdown), and Item Security Code (dropdown). There is a checkbox for 'Require Password Change'.
- Notification Address:** Includes an Email field.
- Model Users:** Includes Account Model (dropdown), Function Model (dropdown), Web Model (dropdown), and Web Forms (dropdown).
- Clone User Information:** Includes Account Access List (dropdown), Function Access List (dropdown), Report Formats (dropdown), and Web Forms (dropdown).
- User Policy Information:** Includes Last Password Change (dropdown), Last Invalid Password (dropdown), Invalid Login Attempts (dropdown), and a checkbox for 'User Locked Out'.

 At the bottom of the form are three buttons: 'Submit', 'Reset Form', and 'Back to Results'.

## User Information

**User Code:** Enter a code that the system will use to identify the user. It must be unique in the record center's RS-SQL database. This is what the user will type when logging into the system. This is a required field.

**Password:** Enter the password the user will type to login. This is a required field.

**Confirm New Password:** This field allows you to re-type the password to make sure you didn't inadvertently type a wrong character. If you enter different characters in the Password and Confirm New Password fields, the system warns you when you click **Submit**. This is a required field when the Password field has been changed.

**Require Password Change:** If selected, the next time the user logs into RSWeb, they will be prompted to change their password. They must change their password to continue. When selected, any existing password policies are ignored for the password entered by the Administrator. However, the new password entered by the user will need to comply with the password policies.

**Last Name:** Enter the last name of the user. This is a required field.

**First Name:** Enter the first name of the user. This is a required field.

**Language:** Select a language for the user. Depending on what your record center has set up, there may be only one language available.

**User Status:** Select whether the user is Active or Inactive. This is set to Active by default when adding a new user.

**Item Security:** Select the item security code to assign to the user. To access an item, the user's item security code must match or exceed the code assigned to the item. The Administrator can only select item security codes that are equal to or lower than what they themselves have.

**Email:** Enter an email address for the user (optional).

**Model Users:** To have this user reference a model user, click the drop down arrow and select a model user. Referencing a model user means the attributes of the model user will apply to this user.

Three separate categories are available for referencing. This allows you to assign a different model user to each category, or to assign a model user to some but not all of the categories.

**Account Model:** includes account access, which determines what accounts the user will have access to.

**Function Model:** includes function access, which determines which features of RSWeb the user will have access to.

**Web Model:** includes forms, column format groups, sort format groups, web query groups.

Unlike cloning, which copies this information from one user to another, referencing a model user means if a change is made to the model user, it is automatically made to any user that references that model user.

---

**NOTE:** This field is only visible if a model user has been created.

---

**Clone User Information:** This section allows you to clone user access information from another user. This can save you a tremendous amount of time. Even if the

access you want to give a user is slightly different, it may still be faster to clone from another user, and then make your changes.

---

**NOTE:** If information is originally cloned and then a model user is selected, the cloned information is saved. It is ignored, but saved so that if the model user is ever unselected, the user then reverts back to the cloned settings.

---

**Account Access List:** Account Access determines what accounts the user will have access to. Click the drop down list to select a user to clone account access from. Only users the Administrator has access to appear in the list. If none is selected, the new user will not have access to any accounts.

**Function Access List:** Function Access determines which features of RSWeb the user will have access to. Click the drop down list to select a user to clone function access from. Only users the Administrator has access to appear in the list. If none is selected, function access is set to No for all functions.

**Report Formats:** Report Formats include all the information that is determined when you print a report, such as Printer Setup, Sort Order, and Column Format. Click the drop down list to select a user to clone report formats from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any reports.

**Web Forms:** Web Forms are all the custom data entry forms available to the Web user. Click the drop down list to select a user to clone Web forms from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any forms.

**Column Format Groups:** Column Formats determines which columns appear in grids. Click the drop down list to select a user to clone column format groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default column format.

**Default Column Formats:** Default Column Formats determines which column format to use as the default if more than one format exists. Click the drop down list to select a user to default column formats from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default column format.

**Sort Format Groups:** Sort Format determines the order in which data is sorted in grids. Click the drop down list to select a user to clone sort format groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will only have access to the default sort format.

**Query Groups:** Query determines which search queries are available to the Web user in each grid. Click the drop down list to select a user to clone query groups from. Only users the Administrator has access to appear in the list. If none is selected the new user will not have access to any queries.

**User Policy Information:** This section displays information that is specific to password policies. If the User Policy setting is disabled by your record center, this section will be grayed out and you cannot edit it.

**Last Password Change:** Displays the last time the user's password was changed.

**Last Invalid Password:** Displays the most recent date/time that an invalid password was entered by the user.

**Invalid Login Attempts:** Displays the number of consecutive invalid login attempts. It is set to zero if the most recent login attempt was successful.

**User Locked Out:** This is automatically set if the user violated the Lockout Policies set by the Record Center. If a user is locked out, clear this check box to unlock them.

Once the fields are completed, click **Submit** to save the new user.

## Edit an Existing User

To edit an existing user, load the user onto the grid and from the **Options** menu, select **Edit**.

The screenshot shows the 'Irvine Record Center' 'User Edit' form. The form is divided into several sections: 'User Information' with fields for User Code (JOHN), Last Name (Dunn), First Name (John), Language (German), User Status (Active), and Item Security Code (99); 'Notification Address' with an Email field; 'Model Users' with Account Model and Function Model (both MODEL2) and a Web Model (MODEL2); 'Clone User Information' with dropdowns for Account Access List, Function Access List, Report Formats, and Web Forms; and 'User Policy Information' with Last Password Change (3/16/2009 1:11 PM), Last Invalid Password, Invalid Login Attempts (0), and a User Locked Out checkbox. At the bottom are 'Submit', 'Reset Form', and 'Back to Results' buttons. The footer shows 'RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 59:45 minutes.'

Make the desired changes and click **Submit**.

When an administrator edits their own record, some fields are unavailable.



**Irvine Record Center**  
User Edit

Welcome Carol  
[Cart \(107 items\)](#) [Logout](#)

**User Information**

User Code: CAROL  
 New Password:   
 Confirm New Password:   
 Last Name: Morris  
 First Name: Carol  
 Language: English  
 User Status: Active  
 Item Security Code: 99

**Notification Address**

Email:

**User Policy Information**

Last Password Change: 3/16/2009 1:08 PM  
 Invalid Login Attempts: 0  
 Last Invalid Password:

RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes.

## Global Edit Existing Users

To edit several existing users at once, load the users onto the grid and from the **Options** menu, select **Global Edit**. The User Admin Global Edit form appears.

**Irvine Record Center**  
User Admin Global Edit

Welcome Carol  
[Cart \(107 items\)](#) [Logout](#)

☐ Language: English  
☐ User Status: Active  
☐ Item Security Code:   
☐ Require Password Change: No

**Clone User Information**

☐ Account Access List:   
☐ Function Access List:   
☐ Report Formats:   
☐ Web Forms:   
☐ Column Format Groups:   
☐ Default Column Formats:   
☐ Sort Format Groups:   
☐ Query Groups:

**Model Users**

☐ Account Model:   
☐ Function Model:   
☐ Web Model:

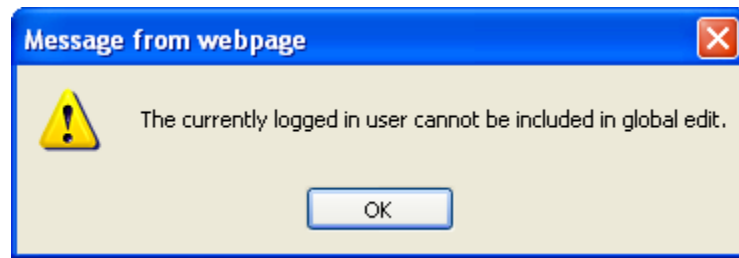
RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:29 minutes.

**NOTE:** A limited number of fields are available for global edit.

Make the desired changes and click **Submit** to save.

**NOTE:** You cannot global edit the Clone User Information section for a user that references a model user. If such a user is in your global edit list, you will receive a warning message letting you know.

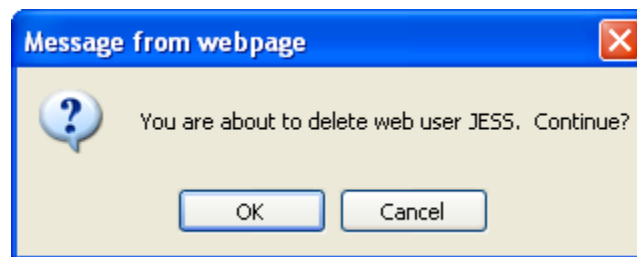
The user logged in cannot include themselves in a global edit. If the Administrator is selected in the **User Admin** grid, when **Global Edit** is selected the following message appears.



Click **OK** and the User Admin Global Edit form appears. Changes are applied to all selected users except the user logged in.

## Delete an Existing User

To delete an existing user, load the user onto the grid and from the **Options** menu, select **Delete**. The following message displays.



Click **OK** to delete the user.

---

**NOTE:** The Administrator cannot delete themselves from the RS-SQL database, and they can only delete users that have not yet performed any work. Users that have performed work cannot be deleted from the **User Admin** grid. To ensure these users cannot log in to RSWeb, they should be set to Inactive in the **User Edit** dialog.

---

## Add a Model User

The Model User feature was designed to allow you to create a model user that other users can then reference for the following attributes.

- account access
- function access
- forms
- column format groups
- sort format groups
- query groups

This works similar to cloning; however, when changes are made to the model user, they are automatically made to all users that reference the model user.

---

**NOTE:** When a user references a model user, the attributes inherited from the model user cannot be modified for the user. Changes can only be made to the model user.

---

To create a model user, from the **User Admin** grid, **Options** menu, select **Add Model User**.

**Irvine Record Center**  
Model User Add

Welcome Carol  
[Cart \(107 items\)](#) [Logout](#)

**User Information**  
User Code  Last Name   
First Name

**Clone User Information**  
Account Access List  Column Format Groups   
Function Access List  Sort Format Groups   
Web Forms  Query Groups

RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes

Enter a User Code, First Name, and Last Name that will help you easily identify this as a model user.

In the Clone User Information section, use the drop down list to select which user you want to clone from for each of the attributes. When you have finished, click **Submit**.

---

**NOTE:** Model users cannot log in to RSWeb.

---

## Global Edit Model Users

When global editing model users, only the following fields will be updated. All other fields are ignored.

Account Access List  
Function Access List  
Web Forms  
Column Fort Groups  
Sort Format Groups  
Query Groups

**O'Neil University**  
User Admin Global Edit

Welcome Carol  
[Cart \(87 items\)](#) [Logout](#)

☐ Language   
☐ User Status   
☐ Item Security Code   
☐ Require Password Change

**Clone User Information**  
☐ Account Access List   
☐ Function Access List   
☐ Report Formats   
☐ Web Forms   
☐ Column Format Groups   
☐ Default Column Formats   
☐ Sort Format Groups   
☐ Query Groups

**Model Users**  
☐ Account Model   
☐ Function Model   
☐ Web Model

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes

# Function Access

This menu option is used by the Administrator to edit function access for users. This determines which features the user will have access to. The only function access records that appear are the ones that the Administrator has access to.

**NOTE:** The Administrator can view his own function access but cannot change it.

## Edit

To edit function access for a user, load the user onto the grid and from the **Options** menu, select **Function Access**.

The screenshot shows the O'Neil University web application interface. The top header includes the O'Neil logo, the text "O'Neil University JOHNSON Function Access", and a welcome message "Welcome CAROL" with a "Logout" link. A left sidebar contains a navigation menu with categories: Home (Intro, My Preferences, Change Password, User Admin), Inventory (Getting Started, Container, Filefolder, Tape, Document, Document Image), and Order (Getting Started, Order Express, Cart, Order Status). The main content area has two tabs: "Options" and "Results". The "Results" tab displays a table with columns: Web Group, Web Page, Description, Access, and Type. The table lists various functions such as "Change Password", "My Preferences", "User Admin", "Account Access", "Add", "Add Model User", "Advanced Search", "Cart Access", "Delete", "Edit", "Export", "Function Access", "Global Edit", "Global Edit Cart ...", "Load from List", "Quick Search", "Reports", and "Edit". The "Access" column shows "Yes" for "Change Password" and "My Preferences", and "No" for all other functions. The "Type" column shows "Web User Admin" for most functions and "Web Account Access" for "Edit". At the bottom of the grid, it says "Page 1 of 3" and "Selected: 0 Unselected: 135 Total: 135". The footer contains "RSWeb.NET 3.06.230 Copyright © 2008 O'Neil Software, Inc. All rights reserved." and "Session will timeout in approximately 58:44 minutes."

All available functions appear. Select the function access you want to change, and from the **Options** menu, select **Edit**.

The screenshot shows the "JONES Function Access Edit" form in the O'Neil University web application. The top header includes the O'Neil logo, the text "O'Neil University JONES Function Access Edit", and a welcome message "Welcome CAROL" with a "Logout" link. The form contains several input fields: "Web Group" (Inventory), "Web Page" (Container), "Description" (Global Edit), "Type" (Container), and "Access" (Yes). There are "Submit" and "Back To Results" buttons at the bottom. The footer contains "RSWeb.NET 3.04.243 Copyright © 2007 O'Neil Software, Inc. All rights reserved." and "Session will timeout in approximately 60:00 minutes."

Use the drop down arrow to change the Access field and click **Submit**. Access for the selected function is changed.

**NOTE:** If a user references a model user, you cannot edit function access for that user. You can, however, edit function access for the model user and all changes will be applied to users referencing the model user.

## Global Edit

To edit more than one function access at a time, select the functions you want to edit. From the **Options** menu, select **Global Edit**.

Access: No

Submit Back To Results

RSWeb.NET 3.04.208 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 19:45 minutes.

Use the drop down arrow to change the Access field and click **Submit**. Access for all selected functions is changed.

## Account Access

The Administrator can use this menu option to edit account access for users. The only accounts that appear are the ones that the Administrator has access to.

---

**NOTE:** The Administrator can view his own account access but cannot change it.

---

## Edit

To edit account access for a user, load the user onto the grid and from the **Options** menu, select **Account Access**.

Options Results

Account	Access
1000	Yes
1000\5000	Yes
1001	Yes
2000	Yes
2000\1044	Yes
2000\1044\1021	Yes
2000\1044\1022	Yes
2000\1045	Yes
2000\1046	Yes
2000\1047	Yes
2000\1048	Yes
3000	Yes
4000	Yes
4000\100	Yes
4000\100\100	Yes
4000\100\200	Yes
4000\200	Yes
4000\300	Yes

Page 1 of 1 Selected: 0 Unselected: 30 Total: 30

RSWeb.NET 3.06.230 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

Select the account access you want to edit, and from the **Options** menu, select **Edit**.

**O'Neil University**  
JAN Account Access Edit

Welcome JAY [Logout](#)

Account: 3000

Access: Yes

[Submit](#) [Back To Results](#)

RSWeb.NET 3.04.208 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 20:00 minutes.

Use the drop down arrow to change the Access field and click **Submit**. The selected account access is changed.

### **Global Edit**

To edit more than one account access at a time, select the accounts you want to edit. From the **Options** menu, select **Global Edit**.

**O'Neil University**  
JAN Account Access Global Edit

Welcome JAY [Logout](#)

Access: No

[Submit](#) [Back To Results](#)

RSWeb.NET 3.04.208 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 20:00 minutes.

Use the drop down arrow to change the Access field and click **Submit**. Access for all selected accounts is changed.

## **Reports**

The Administrator can use this menu option to edit report access for users. The only reports that appear are the ones that the Administrator has access to.

---

**NOTE:** The Administrator can view his own report access but cannot change it.

---

### **Edit**

To edit report access for a user, load the user onto the grid and from the **Options** menu, select **Reports**.

**O'Neil University**  
JOHN Reports

Welcome CAROL [Logout](#)

**Options** **Results**

Report Type	Report Profile	Access
Acct Transaction Rpt	Transactions by Month	No
Container Activity Rpt	Monthly	Yes

Page 1 of 1  
Selected: 1 Unselected: 1 Total: 2

RSWeb.NET 3.05.01 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Select the report access you want to edit, and from the **Options** menu, select **Edit**.

**O'Neil University**  
JOHN Reports Edit

Welcome CAROL [Logout](#)

Report Type: Acct Transaction Rpt  
Report Profile: Transactions by Month  
Access: No

**Submit** **Back To Results**

RSWeb.NET 3.05.01 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Use the drop down arrow to change the Access field and click **Submit**. The selected report access is changed.

### Global Edit

To edit more than one report access at a time, select the reports you want to edit. From the **Options** menu, select **Global Edit**.

**O'Neil University**  
JOHN Reports Global Edit

Welcome CAROL [Logout](#)

Access: No

**Submit** **Back To Results**

RSWeb.NET 3.05.01 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Use the drop down arrow to change the Access field and click **Submit**. Access for all selected reports is changed.

### Cart Access/Global Edit Cart Access

These options allow the administrator to edit or global edit the *Allow Admin to Modify Cart* check box for users. When set to Yes, the administrator can delete or check out items from the user's cart. The administrator can also view orders submitted by this user.

O'Neil University  
JOHNN Cart Access Edit  
Welcome CAROL  
[Logout](#)

Allow Admin to Modify Cart Yes ▾

Submit Back To Results

RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:14 minutes.

The user logged in cannot edit their own cart access, or include themselves in a global edit. If the administrator is selected in the **User Admin** grid, when **Global Edit Cart Access** is selected, the following message appears.



## Print / Export

You can print or export from the **User Admin** grid, the same as all other grids in RSWeb.



# Inventory

---

## Introduction

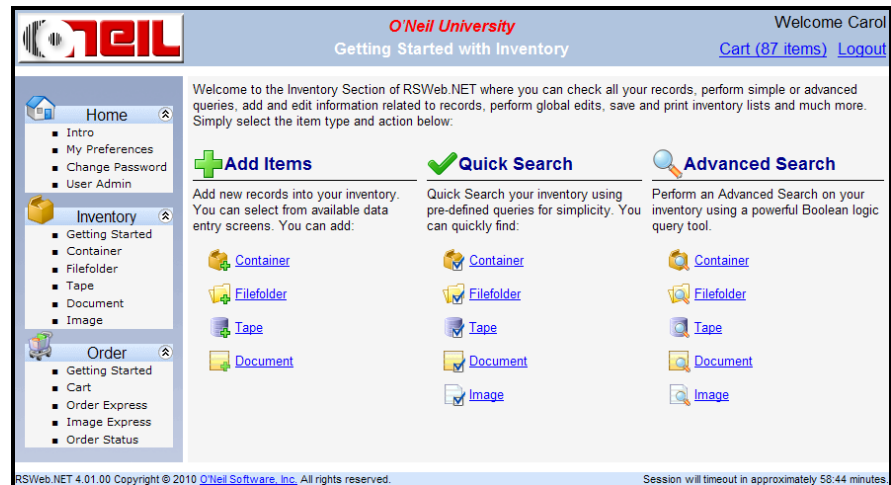
The beauty of RSWeb and its connection with your record center's RS-SQL program is that you can access your stored items and actually update the information associated with them. You can also add new items. This makes data entry easier, eliminates duplicating labor, and ensures accuracy.

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

---

## Menu Options

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



The **Container**, **Filefolder**, **Tape**, **Document**, and **Image** menu options each bring up a grid. Each of these grids has several menu options available along the top

of the grid. Many of the menu options are the same throughout the grids. However, there are a few that are specific to certain grids.

## Options

### **Add (Container, Filefolder, Tape, Document only)**

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

### **Edit (All)**

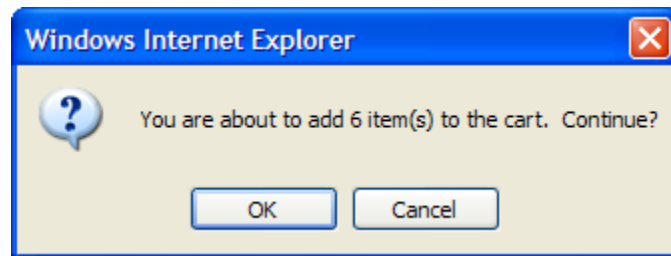
This option is used to edit existing items that have been loaded on the grid and selected for editing. It is described in detail later in this chapter.

### **Global Edit (All)**

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

### **Add to Cart (Container, Filefolder, Tape only)**

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



Click **OK** to continue. The following screen appears.

A screenshot of a web form titled "Add Items to Cart" from O'Neil University. The header includes the O'Neil logo, the text "O'Neil University Add Items to Cart", and a "Welcome CAROL" message with a "Logout" link. The form contains a "Service Type" dropdown menu with "Deliver (Bring the item to me.)" selected. Below this are input fields for "Requestor" and "Cost Center", and a "Comments" text area. At the bottom right are "Add To Cart" and "Back to Results" buttons. The footer contains copyright information: "RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved." and a session timeout notice: "Session will timeout in approximately 59:30 minutes."

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

**O'Neil University** Welcome Carol  
Add to Cart Summary [Cart \(90 items\)](#) [Logout](#)

[Print](#) [View Cart](#) [Order Now](#) [Back to Results](#)

Font Size [8pt](#)

### Add to Cart Summary

Service Type: Deliver (Bring the item to me.)  
Requestor: Joe  
Cost Center: 300  
Comments: Please deliver to shipping dock.

Barcode	Type	Alternate Code	Account	Status
134501	Container	XYX	1000	Added to cart successfully.
134502	Container	PPP	1000	Added to cart successfully.
134503	Container	148	1000	Added to cart successfully.

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 52:44 minutes.

Click the **View Cart** button to view the items in the cart.

### View Description (Container, Filefolder, Tape only)

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

**O'Neil University** Welcome CAROL  
Item 134515 Description [Logout](#)

[Print Page](#) [Back To Results](#)

### Item 134515 Description

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

RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

- http
- www
- mailto

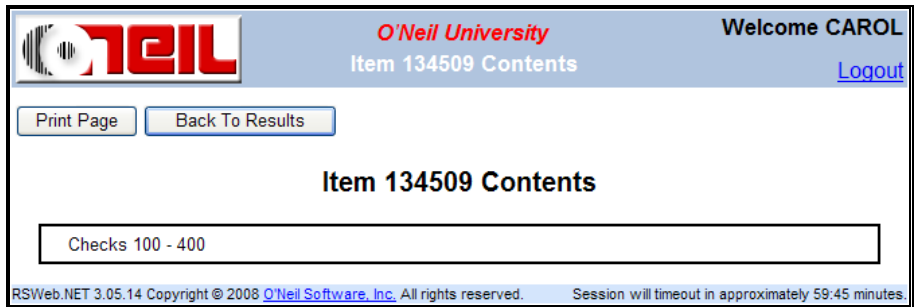
For example, if [www.oneilsoft.com](http://www.oneilsoft.com) is included in the description, clicking on the reference will take you to that website. The same is true of email references, so clicking on <mailto:jsmith@bank.com> will attempt to invoke an email program with the To: field completed automatically.

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

Click the **Back to Results** button to return to the Inventory grid.

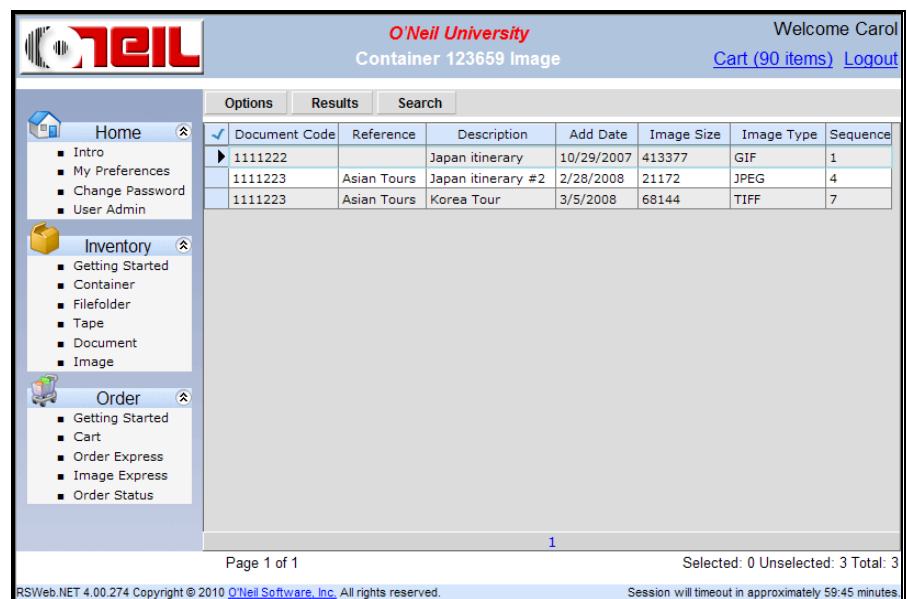
### View Contents (Container, Filefolder, Tape only)

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



### List Images (Container, Filefolder, Document only)

This option lists all images contained in the selected item. Select a container (or filefolder or document) in the grid and under the **Options** menu, select **List Images**. The **Container xyz Image** screen appears.



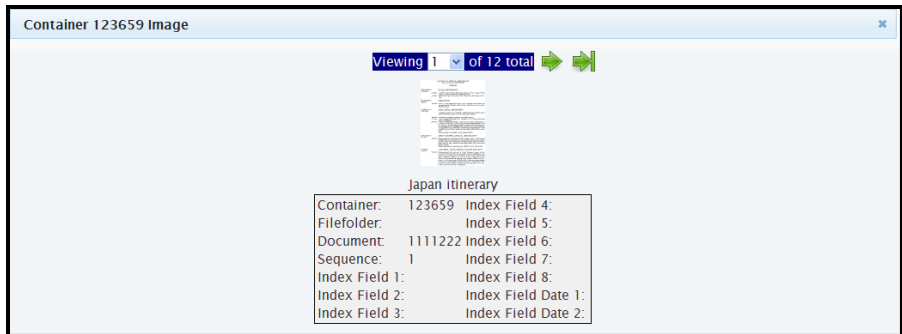
All images contained in the current item are displayed.

- For containers - images in the container, images in the filefolders (and images in the documents in those filefolders) in the container, and images in the documents in the container.
- For filefolders - images in the filefolder and images in the documents in those filefolders.

Items will be sorted by Container Code + Filefolder Code + Document Code + Sequence.

### View Images (Container, Filefolder, Document only)

This option allows you to view all images contained in the selected item. Select a container (or filefolder or document) in the grid and under the **Options** menu, select **View Images**. The images for the current item appear along with the image information.



Click the arrows to navigate between multiple images. Click the thumbnail to view the full image.

### ***View Image (Image only)***

This option allows you to view images from the Image grid. You can select and view multiple images at the same time.

### ***Delete (Document, Image only)***

This option is used to delete a document or image from the database.

### ***Add Document Imaging Requests to Cart (Document only)***

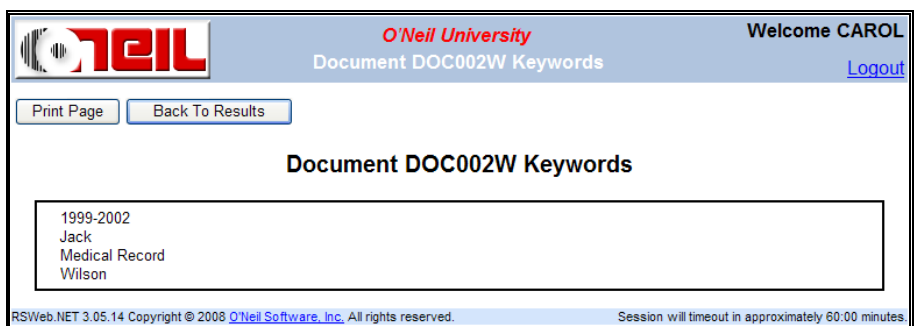
This option is used to add an imaging request to the cart. See the *Document* section for more information.

### ***Add FF/Container to Cart (Document only)***

This option is used to add the filefolder or container that a document is contained in to the cart. See the *Container* or *Filefolder* section for more information.

### ***View Keywords (Document only)***

This option works the same as the View Description option, but displays Keywords for a document.



### ***Print (All)***

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

Barcode	Alternate Code	Add Date Time	Destroy Date	Current Status	Status Date Time	Container Type	Account
134502	PPP	4/21/2000 12:00:00 AM	10/30/1999	In	9/7/2010 10:27:41 AM	ARCHIVE	1000
134503	148	4/21/2000 12:00:00 AM	10/30/2000	In	9/3/2010 8:41:17 AM	ARCHIVE	1000
134505	MMM	4/21/2000 12:00:00 AM	8/14/2001	In	9/3/2010 8:41:17 AM	ARCHIVE	1000/5000

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

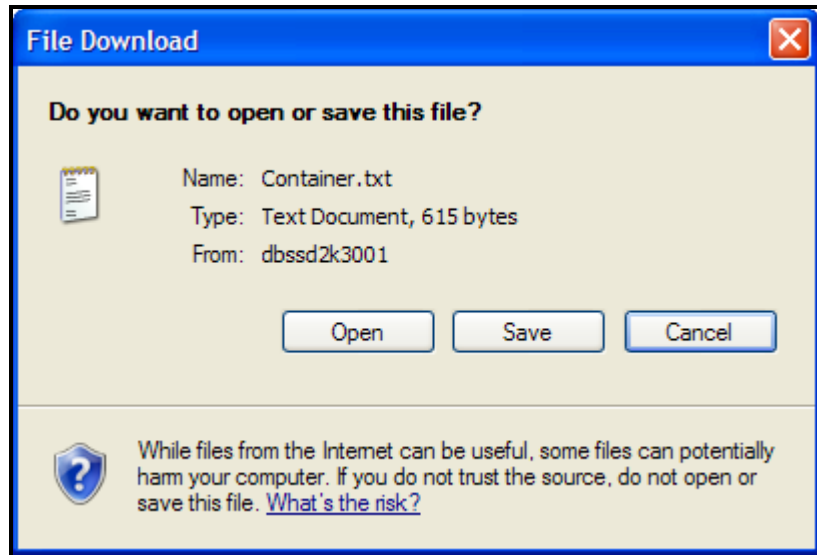
## Export (All)

All grids in RSWeb have an Export feature. This allows you to export data to a .txt file that can be viewed in Microsoft Excel.

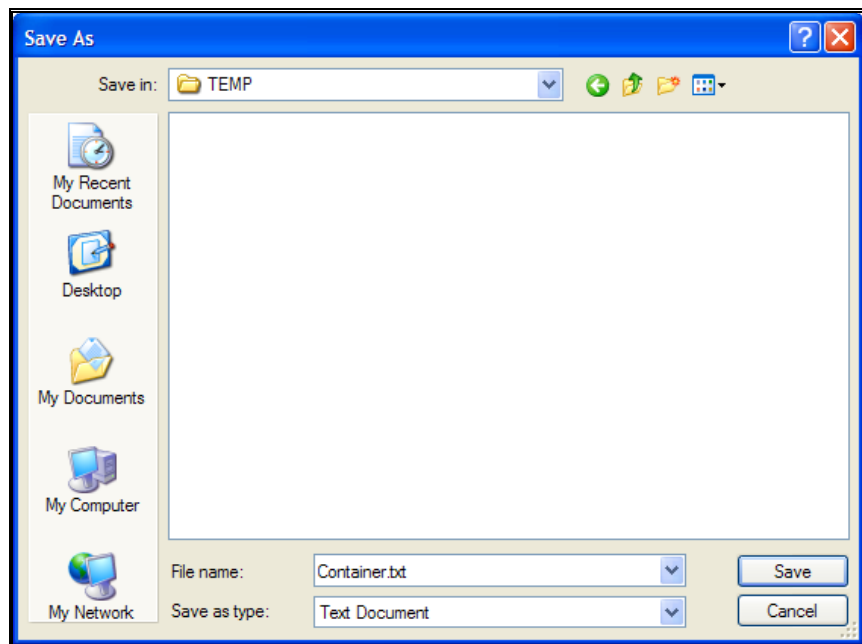
Load the data you want to export onto the grid. From the **Options** menu in any grid, select **Export**. The **Export Grid** dialog appears.

By default, the Delimiter is a comma (,) and the Quotes around fields check box is selected. Both settings can be changed.

Click the **Download** button to begin the export. The **File Download** dialog gives you the option to **Open** or **Save** the file.



Click **Save**, and the **Save As** dialog appears.



Enter the path where you want the file saved. You can also rename the file. Click **Save** when you have finished.

### ***Choose Column Format (All)***

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

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

## Results

### **Select All**

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

### **Unselect All**

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

### **Invert Selection**

After selecting several items in a grid, you may decide to make a change to all the other unselected items. In this case you can invert the selected items. This causes all selected items to become unselected, and all unselected items to become selected.

### **Clear All**

This option clears all items from the grid.

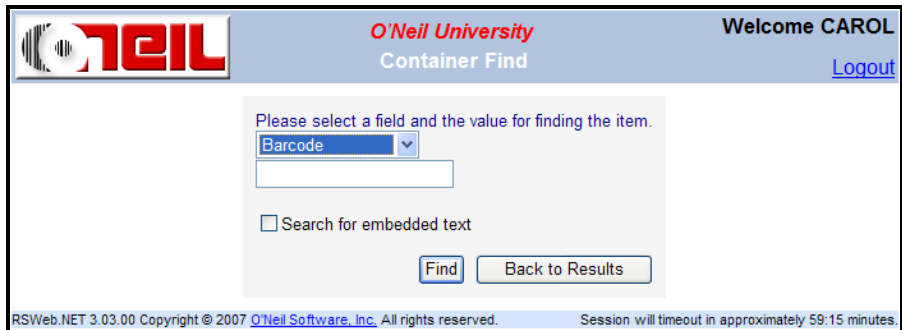
### **Clear Selected**

This option clears only selected items from the grid.

### **Find / Find Next**

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





**O'Neil University** Welcome CAROL  
Container Find [Logout](#)

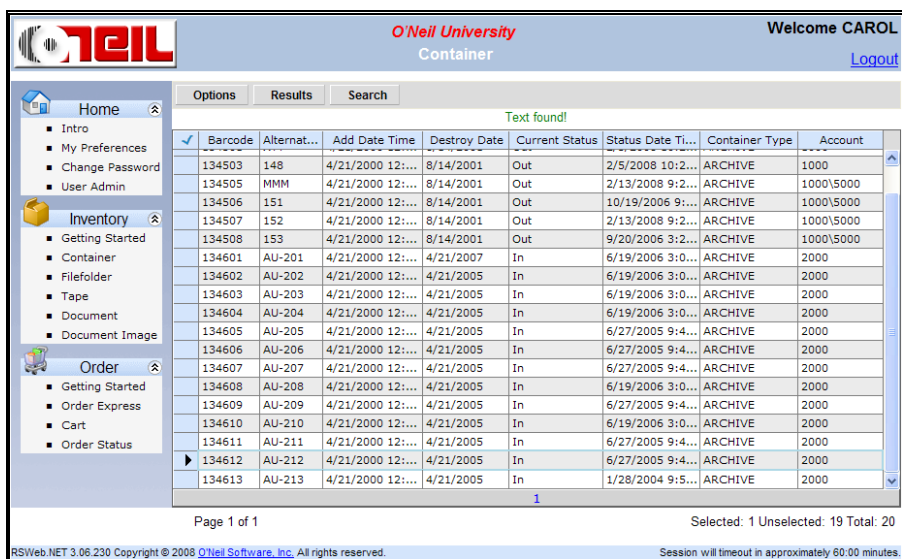
Please select a field and the value for finding the item.

Barcode

☐ Search for embedded text

RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:15 minutes.

Click the drop down arrow to select the field you want to use, and then enter the value. For example, you may want to find items in your grid that are of a certain container type. Select Container Type and then enter the type of container in the value field. To include embedded text in your search, select the Search for embedded text check box. Click **Find** to locate the item in the grid.



**O'Neil University** Welcome CAROL  
Container [Logout](#)

Options Results Search

Text found!

Barcode	Alternat...	Add Date Time	Destroy Date	Current Status	Status Date T1...	Container Type	Account
134503	148	4/21/2000 12:...	8/14/2001	Out	2/5/2008 10:2...	ARCHIVE	1000
134505	MMM	4/21/2000 12:...	8/14/2001	Out	2/13/2008 9:2...	ARCHIVE	1000\5000
134506	151	4/21/2000 12:...	8/14/2001	Out	10/19/2006 9:...	ARCHIVE	1000\5000
134507	152	4/21/2000 12:...	8/14/2001	Out	2/13/2008 9:2...	ARCHIVE	1000\5000
134508	153	4/21/2000 12:...	8/14/2001	Out	9/20/2006 3:2...	ARCHIVE	1000\5000
134601	AU-201	4/21/2000 12:...	4/21/2007	In	6/19/2006 3:0...	ARCHIVE	2000
134602	AU-202	4/21/2000 12:...	4/21/2005	In	6/19/2006 3:0...	ARCHIVE	2000
134603	AU-203	4/21/2000 12:...	4/21/2005	In	6/19/2006 3:0...	ARCHIVE	2000
134604	AU-204	4/21/2000 12:...	4/21/2005	In	6/19/2006 3:0...	ARCHIVE	2000
134605	AU-205	4/21/2000 12:...	4/21/2005	In	6/27/2005 9:4...	ARCHIVE	2000
134606	AU-206	4/21/2000 12:...	4/21/2005	In	6/27/2005 9:4...	ARCHIVE	2000
134607	AU-207	4/21/2000 12:...	4/21/2005	In	6/27/2005 9:4...	ARCHIVE	2000
134608	AU-208	4/21/2000 12:...	4/21/2005	In	6/19/2006 3:0...	ARCHIVE	2000
134609	AU-209	4/21/2000 12:...	4/21/2005	In	6/27/2005 9:4...	ARCHIVE	2000
134610	AU-210	4/21/2000 12:...	4/21/2005	In	6/19/2006 3:0...	ARCHIVE	2000
134611	AU-211	4/21/2000 12:...	4/21/2005	In	6/27/2005 9:4...	ARCHIVE	2000
134612	AU-212	4/21/2000 12:...	4/21/2005	In	6/27/2005 9:4...	ARCHIVE	2000
134613	AU-213	4/21/2000 12:...	4/21/2005	In	1/28/2004 9:5...	ARCHIVE	2000

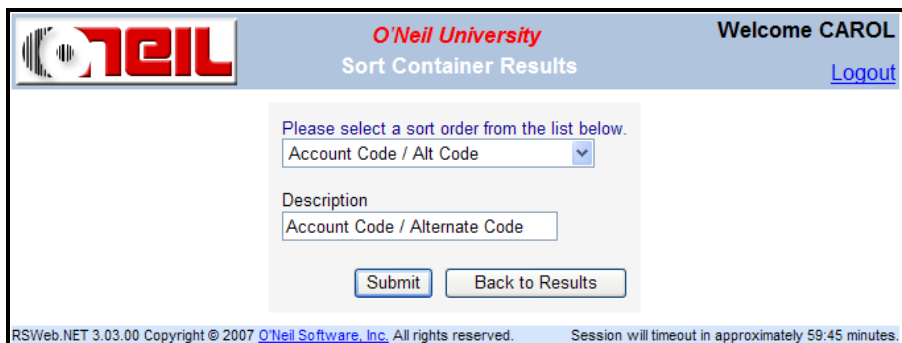
Page 1 of 1 Selected: 1 Unselected: 19 Total: 20

RSWeb.NET 3.06.230 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

## Sort

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



**O'Neil University** Welcome CAROL  
Sort Container Results [Logout](#)

Please select a sort order from the list below.

Account Code / Alt Code

Description  
Account Code / Alternate Code

RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

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

## Save to List

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

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

The screenshot shows the 'Save Container List' page. At the top, there is a header with the O'Neil logo, 'O'Neil University', 'Save Container List', and 'Welcome CAROL' with a 'Logout' link. The main content area has a text prompt: 'Please enter a list name for saving the selected item(s)'. Below this is a text input field labeled 'List Name'. To the right of the input field are two buttons: 'Save' and 'Back to Results'. At the bottom of the page, a footer contains the text 'RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 59:45 minutes.'

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

## Search

### Quick Search

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

The screenshot shows the 'Container Quick Search' page. At the top, there is a header with the O'Neil logo, 'O'Neil University', 'Container Quick Search', and 'Welcome CAROL' with a 'Logout' link. The main content area has a text prompt: 'Please select a quick search query name from the list below.' Below this is a dropdown menu currently showing 'Containers Account'. Underneath the dropdown is a text area labeled 'Description' containing the text 'A list of containers by level 1 account code'. Below the description is a checkbox labeled 'Clear All Items Currently on Grid'. At the bottom of the main area is a text input field labeled 'Account No.:'. To the right of the input field are two buttons: 'Search' and 'Back to Results'. At the bottom of the page, a footer contains the text 'RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 58:44 minutes.'

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

---

**NOTE:** The query name field displays the last query selected. The last data that was entered also displays.

---

## Advanced Search

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

The screenshot displays the 'O'Neil University Container Advanced Search' web application. At the top, there's a header with the O'Neil logo, the text 'O'Neil University Container Advanced Search', and a user greeting 'Welcome Carol' with links for 'Cart (90 items)' and 'Logout'. The main area shows a list of search criteria, currently containing 'Barcode Is Equal To'. Below this list are 'Add More' and 'Delete' buttons. A section below allows defining new criteria, featuring a dropdown menu (currently showing 'Barcode'), an operator dropdown (currently showing 'Is Equal To'), and a text input field. 'Add' and 'Remove' buttons are positioned below the input field. At the bottom of the main area are 'Search' and 'Back to Results' buttons. A checkbox labeled 'Clear All Items Currently on Grid' is also present. The footer contains the text 'RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved.' and a session timeout warning: 'Session will timeout in approximately 59:45 minutes.'

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

In the lower section, you can define the criteria for your search. Click the drop down arrow to select a field and then select an operator. Additional input fields become available depending on the field and operator selected.

Operator options include the following (depending on the field selected).

Is Equal To	Returns only items that match the entered text exactly.
Is Not Equal To	Returns all items that do not match the entered text.
Is Less Than	Returns all items that are less than the entered text.
Is Less Than or Equal To	Returns all items that are less than or equal to the entered text.
Is Greater Than	Returns all items that are greater than the entered text.
Is Greater Than or Equal To	Returns all items that are greater or equal to the entered text.
Contains	Returns all items that contain the entered text anywhere within it.
Begins With	Returns all items that begin with the entered text.

Type the constant in the input field, and then click **Add**. For some fields you can enter multiple constants.

---

**NOTE:** If you select a field that is required, and use the Is Equal To operator, you cannot leave the input field blank. If you do, an error message is generated.

---

Select the Clear All Items Currently on Grid check box if you want to clear all existing items from the grid before your results are returned. Otherwise, the new results will be added to the existing items already on the grid.

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

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

### **Load from List**

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

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

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

---

## Containers

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

**NOTE:** The Container grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

---

## Add New Containers

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

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

The screenshot shows the 'O'Neil University Container Add' web form. At the top, there's a header with the O'Neil logo, the text 'O'Neil University Container Add', and a user greeting 'Welcome CAROL' with a 'Logout' link. Below the header, a 'Current Status \*' field displays 'PENDING'. The main form area contains several input fields: 'Account' (a multi-part field), 'Barcode \*', 'Alternate Code', 'Contents Range Start', 'Contents Range End', 'Contents Start Date' (with a dropdown arrow), 'Contents End Date' (with a dropdown arrow), 'Contents' (a large text area), 'Description' (a large text area), and 'Destroy Date' (with a dropdown arrow). At the bottom right of the form are three buttons: 'Submit', 'Reset Form', and 'Back To Results'. Below the main form is an 'Available Forms' section with a dropdown menu currently showing 'RSWeb.NET Container Add Intermediate \*' and a 'Set As Default' button. The footer of the page contains the text 'RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 59:45 minutes'.

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

Enter your data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Date fields bring up a calendar. Some fields may contain a drop down list for you to select from. The following keystrokes can be used for easy navigation within a drop down selection list. In addition, the drop down list can be closed by double clicking anywhere in the form.

Keystroke	Action
Up/Down arrow	Moves the cursor up/down to select a row in current page
Home	Moves the cursor to the first row in the current page
End	Move the cursor to the last row in the current page
Ctrl + Page Down	Displays the next page
Ctrl + Page Up	Displays the previous page
Ctrl + Home	Displays the first page
Ctrl + End	Displays the last page
Left arrow	Moves the scroll bar left (if it is shown)
Right arrow	Moves the scroll bar right (if it is shown)
Page Down	Moves the scroll bar down (if it is shown)
Page Up	Move the scroll bar up (if it is shown)

Enter	Selects a value, closes the drop down and puts focus on the display
Esc	Closes the dropdown and puts focus on the display

Once you have completed the fields, click **Submit**.

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

## Search for Existing Containers

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

## Edit Existing Containers

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

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

**NOTE:** You can also bring up the default Edit form by double clicking on an item in the grid.

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

Make your changes or enter new data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue making necessary changes to any other containers. The changes you have entered are sent to the database at the record center.

## Global Edit Containers

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

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


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

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

## Retention Information

When adding/editing an item, after the **Submit** button has been clicked, the retention information related fields are checked to see if the calculated destroy date has changed and whether the record series is on Legal Hold.

If the record series is on Legal Hold and the current Destroy Date is blank and the Permanent Flag is set to Yes, the item is saved without prompting you because nothing changed. If the Destroy Date is not blank or the Permanent Flag is set to No, you receive the following prompt.



**O'Neil University**  
 Container Edit

Welcome CAROL  
[Logout](#)

Selected Record Series is on Legal Hold. Please choose one of the following options, then click Submit:

☐ Clear Destroy Date and set the Permanent Flag to Yes  
☐ Override Legal Hold status and keep current Destroy Date (8/14/2001) and do not change Permanent Flag

Current Status *	Status Date	Add Date	Container Type
In	6/19/2006	4/21/2000	ARCHIVE

Account  
 1000 5000

Barcode \*  
 134504

Alternate Code  
 TTT

Contents Range Start  
 LOUIS

Contents Range End  
 OPPENHEIM

Contents Start Date  
 10/1/1996

Contents End Date  
 10/30/1996

Destroy Date  
 8/14/2001

Category

Set Name

Record Series  
 lgr

Custom Field 1

Custom Field 2

Custom Field 3

Custom Field 4

Custom Date

Description  
 Account records from October 1996

Contents  
 Death records

Permanent Item \*  
 No

Available Forms  
 RSWeb.NET Container Edit Complete

RSWeb.NET 3.06.230 Copyright © 2008 O'Neil Software, Inc. All rights reserved.
 Session will timeout in approximately 59:15 minutes.

If you select “Clear Destroy Date and set the Permanent Flag to Yes” and click **Submit**, the Destroy Date will be cleared, the Permanent Flag will be set to Yes, and the record will be saved.

If you select “Override Legal Hold status and keep current Destroy Date” and click **Submit**, no changes are made and the record is saved.

If the current Destroy Date is blank and a new Destroy Date has been calculated, the Destroy Date will automatically be updated with the calculated Destroy Date and the record will be saved without prompting you.

If the current Destroy Date is not blank and the calculated Destroy Date is different from the current one, or if the current Permanent Flag is Yes, you receive the following prompt.



**IHS Home Care**  
Container Edit

Welcome TIMO  
[Logout](#)

The Destroy Date has been recalculated and is different from the current Destroy Date. Please choose one of the following options, then click Submit:  
☐ Use calculated Destroy Date (4/21/2009)  
☐ Keep current Destroy Date (4/27/2007)

Current Status *	Status Date	Add Date	Container Type
Transfer	1/10/2007	4/21/1997	01

Account: 0100 0018 Barcode: 503867 Alternate Code: AC

Contents Range Start: Contents Range End: Contents Start Date: 7/1/1994

Contents End Date: 8/30/1994 Destroy Date: 4/27/2007 Category: ZEBRA

Set Name: Record Series: 01 Custom Field 1: TestäÜXYZ

Custom Field 2: Custom Field 3: Custom Field 4:

Custom Date: 3/23/2005 Description: [1234567890] 1234567890 1234567890 1234567890  
JOURNAL ENTRIES: PHH EVANSVILLE 1201-2900, PHH CHAF 3000, PHH CONNERSVILLE 1204-3100, PHH CHAF

Contents: 1234567890 1234567890 1234567890 1234567890  
WWW.google.com  
HTTP://www.google.com

Permanent Item \*  
Yes

[Submit](#) [Reset Form](#) [Back To Results](#)

If you select “Use calculated Destroy Date” and click **Submit**, the Destroy Date will be set with the calculated date, the Permanent Flag will be set to No if necessary, and the record will be saved.

If you select “Keep current Destroy Date” and click **Submit**, the record will be saved with the current Destroy Date and Permanent Flag.

## Filefolders

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

**O'Neil University**  
Filefolder

Welcome Carol  
[Cart \(90 items\)](#) [Logout](#)

Options Results Search

Account	Barcode	Alternate Code	Container Barc...	Container Alter...	Destroy D...	Contents Rang...

Page 1 of 1

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes

---

**NOTE:** The Filefolder grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

---

## Add New Filefolders

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

The screenshot shows the 'Filefolder Add' form for O'Neil University. The header includes the O'Neil logo, the text 'O'Neil University Filefolder Add', and a welcome message 'Welcome CAROL' with a 'Logout' link. The form has a 'Current Status \*' section showing 'Pending'. Below this are several input fields: 'Account', 'Barcode \*', 'Alternate Code', 'Short Description', 'Container Barcode', 'Contents Range Start', 'Contents Range End', 'Contents Start Date', 'Contents End Date', 'Description', 'Contents', and 'Destroy Date'. Some fields have dropdown menus or date pickers. At the bottom right are buttons for 'Submit', 'Reset Form', and 'Back To Results'. Below the form is an 'Available Forms' section with a dropdown menu showing 'RSWeb.NET Filefolder Add Intermediate \*' and a 'Set As Default' button. The footer contains copyright information and a session timeout warning.

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

Enter your data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

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

## Search for Existing Filefolders

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

## Edit Existing Filefolders

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

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

**NOTE:** You can also bring up the default Edit form by double clicking on an item in the grid.

**O'Neil University**  
Filefolder Edit

Welcome CAROL [Logout](#)

Account	Barcode *	Container Alternate Code	Current Status *	Status Date	Add Date
1000	5000	4568000	TTT	In	12/5/2007
Category	Set Name	Permanent Item *	Record Series	Custom Field 1	Custom Field 2
		No	PAY		
Custom Field 3	Custom Field 4	Custom Date			

Alternate Code:

Short Description:

Container Barcode:

Contents Range Start:

Contents Range End:

Contents Start Date:

Contents End Date:

Description:

Contents:

Destroy Date:

Available Forms:

RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

Make your changes or enter new data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue making necessary changes to any other filefolders. The changes you have entered are sent to the database at the record center.

## Global Edit Filefolders

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

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

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

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

## Tapes

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

---

**NOTE:** The Tape grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

---

## Add New Tapes

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

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

Enter your data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

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

## Search for Existing Tapes

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

## Edit Existing Tapes

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

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

---

**NOTE:** You can also bring up the default Edit form by double clicking on an item in the grid.

---

**O'Neil University**  
Tape Edit

Welcome CAROL [Logout](#)

Account	Barcode *	Container Barcode	Container Alternate Code	Tape Type	Current Status *
1000	14623000			TAPE	In
Status Date	Add Date	Destroy Date	Category	Permanent Item *	Record Series
3/3/2000	11/5/1999			No	PAY
Contents Range Start	Contents Range End	Custom Field 1	Custom Field 2	Custom Field 3	Custom Field 4
Custom Date	Description	Contents			

Alternate Code:   
Short Description:   
Set Name:   
Contents Start Date:   
Contents End Date:

Available Forms

RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

Make your changes or enter new data in the appropriate fields. An asterisk next to a field indicates that it is a required field. Some fields contain a drop down list for you to select from. Date fields bring up a calendar. Once you have completed the fields, click **Submit**.

Continue making necessary changes to any other tapes. The changes you have entered are sent to the database at the record center.

## Global Edit Tapes

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

**O'Neil University**  
Tape Global Edit

Welcome CAROL [Logout](#)

<input type="checkbox"/> Account	<input type="checkbox"/> Container Barcode	<input type="checkbox"/> Short Description
<input type="checkbox"/> Custom Field 1	<input type="checkbox"/> Custom Field 2	<input type="checkbox"/> Custom Field 3
<input type="checkbox"/> Custom Field 4	<input type="checkbox"/> Custom Date	<input type="checkbox"/> Set Name
<input type="checkbox"/> Contents Start Date	<input type="checkbox"/> Contents End Date	<input type="checkbox"/> Category
<input type="checkbox"/> Contents Range Start	<input type="checkbox"/> Contents Range End	<input type="checkbox"/> Record Series
<input type="checkbox"/> Description	<input type="checkbox"/> Contents	<input type="checkbox"/> Destroy Date
<input type="checkbox"/> Permanent Item *		

RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

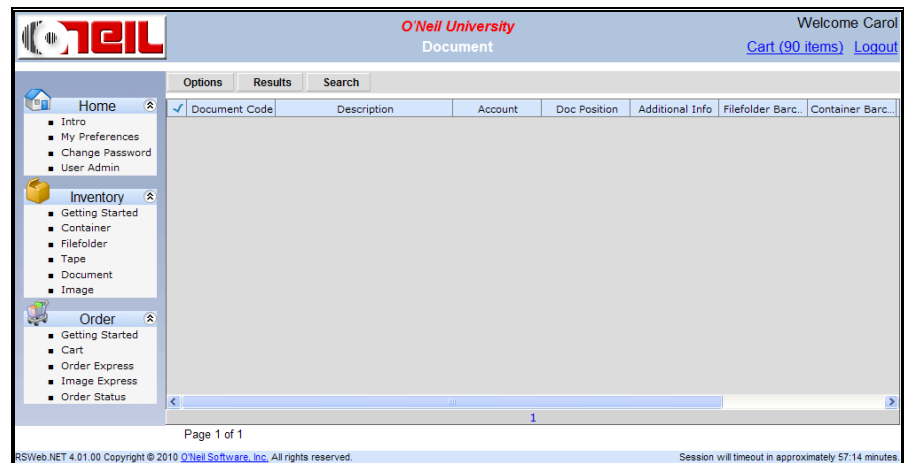
To global edit a field, first select the check box next to the field name. Next, enter the information you want to appear in that field for all the tapes. Be aware that if a check box is selected but the field is left blank, the field will be edited to blank for all the tapes. Only select the check boxes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

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

---

## Documents

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



### Add New Documents

New documents can be added to your account using RSWeb. Once the information is entered and submitted, it is added to the database at the record center. To add a new document, from the **Options** menu, select **Add**. The Document Add form appears.

## Document Section

**Code:** Type the code in this field, or use the **Auto Gen** button to auto generate a code. The **Auto Gen** button is only available if it has been set up by your record center.

**Description:** Type a description for the document.

**Additional Info:** In this field you can type any additional information you want to include for the document.

**Position:** Use to describe the position of the document in the container/filefolder.

**Document Type:** Use the drop down arrow to select the type of document. Document types are set up by your record center.

**Hardcopy Exists:** Use the drop down arrow to indicate whether or not a hard copy of this document exists. The default setting is Yes.

## Contained-In Section

In this section, indicate whether the document is to be contained in a filefolder or a container. Complete the fields based on the selection you make. You must enter either a Code or an Alternate Code and Account.

**Code:** Enter the code for the filefolder or container that contains the document. To add a new filefolder, click **Add Filefolder**.

**Alternate Code:** If you do not know the code, you can enter the alternate code instead.

**Account:** The account field is filled in automatically based on the Contained-In information entered.

## Keywords Section

Use this section to add keywords for the document. They can be used to search on later. You can add keywords, edit existing keywords, delete a keyword, or delete all keywords at once.

Click **Submit** to save the new document.



## Edit Existing Documents

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

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

---

**NOTE:** You can also bring up the Edit form by double clicking on an item in the grid.

---

The screenshot shows the 'Document Edit' form in the RSWeb interface. The header includes the O'Neil University logo, the text 'O'Neil University Document Edit', and a welcome message 'Welcome CAROL' with a 'Logout' link. The form is divided into several sections: 'Document' with fields for 'Code \*' (1111222), 'Description' (Medical Records), and 'Additional Info' (2005-2006 Dave Martin); 'Position' with a 'Document Type' dropdown set to 'MED'; 'Contained-in \*' with radio buttons for 'Filefolder' and 'Container', and fields for 'Code' (123659), 'Alternate Code', and 'Account' (1000); and 'Keywords' with a list containing 'Dave Martin' and buttons for 'Add', 'Edit', 'Delete', and 'Delete All'. At the bottom are 'Submit', 'Reset Form', and 'Back to Results' buttons. A footer bar contains copyright information and a session timeout warning.

Make your changes or enter new data in the appropriate fields. Some fields contain a drop down list for you to select from. Once you have completed the fields, click **Submit**.

## Global Edit Documents

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

The screenshot shows the 'Document Global Edit' form. The header is similar to the previous form, with the O'Neil University logo, 'O'Neil University Document Global Edit', and 'Welcome CAROL' with a 'Logout' link. The form contains three sections, each with a checkbox and a text field: 'Description', 'Doc Position', and 'Document Type'. At the bottom are 'Submit' and 'Back to Results' buttons. A footer bar contains copyright information and a session timeout warning.

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

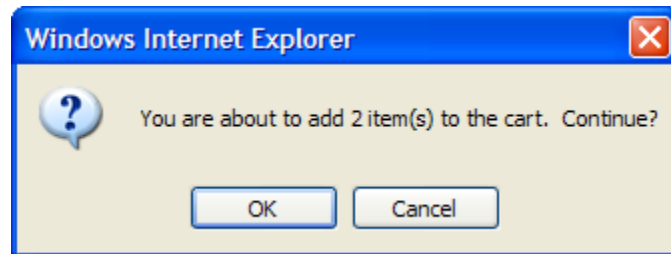
To global edit a field, first select the check box next to the field name. Next, enter the information you want to appear in that field for all the documents. Be aware that

if a check box is selected but the field is left blank, the field will be edited to blank for all documents. Only select the check boxes for the fields you want to edit.

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

## Add Document Imaging Requests to Cart

Individual documents cannot be ordered for delivery in RSWeb. However, you can request that an image be made of the document that you can then view in RSWeb. To add a document imaging request to the cart, from the **Options** menu, select **Add Document Imaging Requests to Cart**. The following prompt displays.



Click **OK** to continue.

A screenshot of the 'Add to Cart' form in the RSWeb application. The form is titled 'Add to Cart' and is part of the 'O'Neil University' interface. It contains several input fields: 'Document Code \*' (with a value of 'DOC000700000000'), 'Service Type' (a dropdown menu showing 'Imaging (image the item)'), 'Requestor', 'Cost Center', and 'Comments'. Below these is an 'Image Info' section with fields for 'Reference', 'Description', and eight 'Index Field' entries (Index Field 1 through Index Field 8). There are also two 'Index Field Date' dropdowns. At the bottom of the form is a large text area for 'Imaging Instructions \*' and a checkbox labeled 'Apply to all selected rows'. The form has 'Add to Cart' and 'Back to Results' buttons at the bottom right. The footer of the page shows 'RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 58:45 minutes'.

Complete the fields. Imaging Instructions is a required field. If you are adding more than one document imaging request to the cart at the same time and you want the information entered here to apply to all the items, select the *Apply to all selected rows* check box. Otherwise, when you click **Add to Cart**, each additional request displays so you can enter the information individually.

When you have completed the fields, click **Add to Cart**.

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

Code	Type	Requestor	Cost Center	Imaging Instructions	Status
DOC000700000000	Document	John Smith	66	Please scan pages 1-4	Added to cart successfully.
DOC000800000000	Document	John Smith	66	Please scan pages 1-4	Added to cart successfully.

The imaging request is added to the cart.

## Add FF/Container to Cart

Individual documents cannot be ordered for delivery in RSWeb. However, you can order the filefolder or container that contains the document. From the **Options** menu, select **Add FF/Container to Cart**. The following prompt appears.

Message from webpage

You are about to add container\filefolders to the cart. Continue?

OK Cancel

Click **OK** to continue.

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 56:44 minutes.

Service Type  
Deliver (Bring the item to me.)

Requestor  
John Smith

Cost Center  
66

Comments

Add to Cart Back to Results

Complete the fields and click **Add to Cart**.

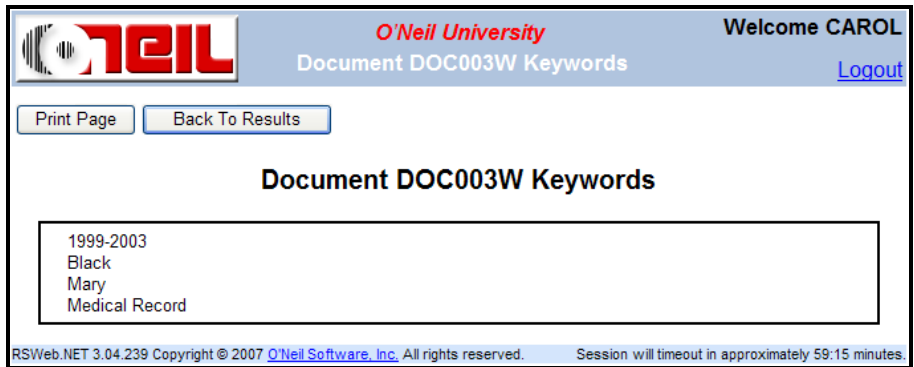
RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

Code	Type	Requestor	Cost Center	Imaging Instructions	Status
DOC000700000000	Document	John Smith	66	Please scan pages 1-4	Added to cart successfully.
DOC000800000000	Document	John Smith	66	Please scan pages 1-4	Added to cart successfully.

The filefolder or container is added to the cart.

## View Keywords

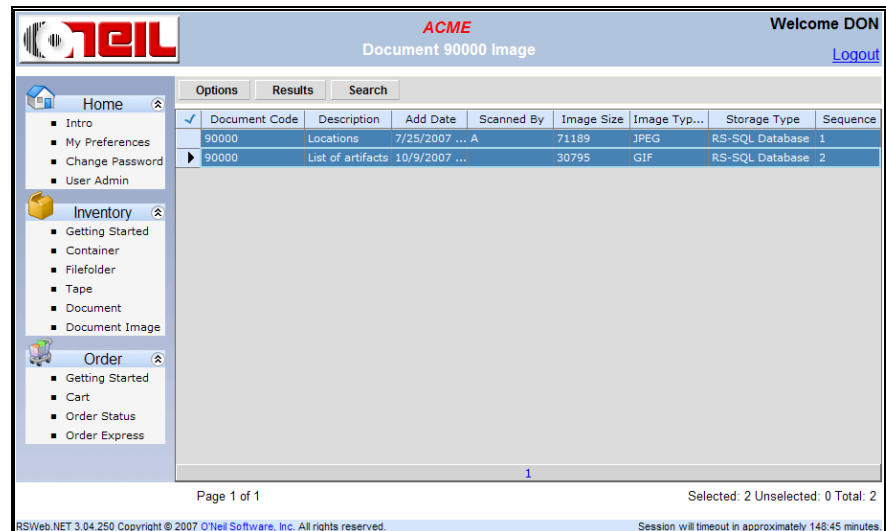
To view keywords for a document, from the **Options** menu, select **View Keywords**.



Click **Back to Results** to return to the **Document** grid.

## List Images

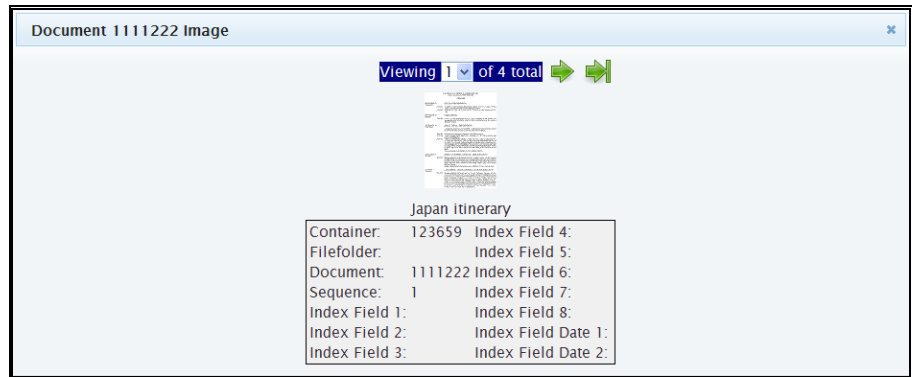
An image of a document can be scanned and stored in the database for viewing in RSWeb. The **Image** menu takes you to the **Document 'xyz' Image** grid which displays a list of all images that have been scanned for the selected document.



From this grid, you can then edit, delete, view or print the image. For more information on these menu options, see the *Document Image* section.

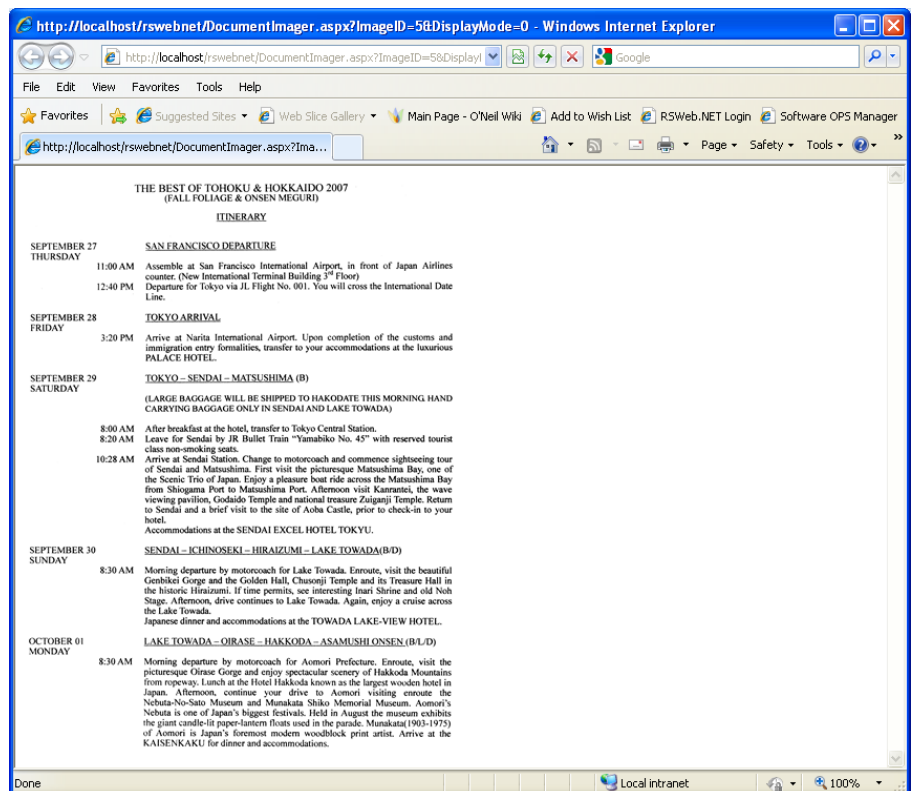
## View Images

The **View Image** menu option allows you to view the images for the selected document.



A thumbnail view of the image displays. The document the image belongs to displays at the top of the screen. If you selected multiple images in the grid, you can use the arrows to move between the images.

Click the thumbnail to view the image in its original size and proportion. You can choose to open the file or save it to your computer. The file opens in your browser.

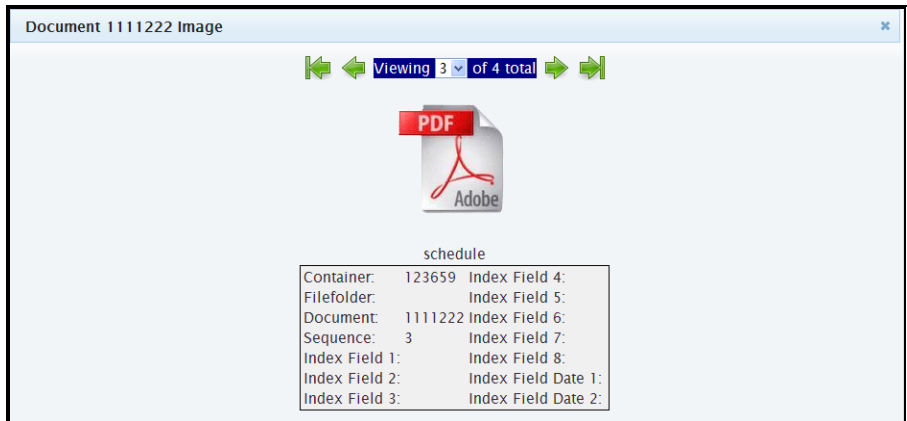


You can then zoom in by clicking on the image, and scroll to view the entire document.

When you have finished viewing the images, close the Image Viewer to return to the **Document** grid.

## Viewing a PDF File

If the image is a PDF, there will not be a preview of the image. A PDF icon appears instead.

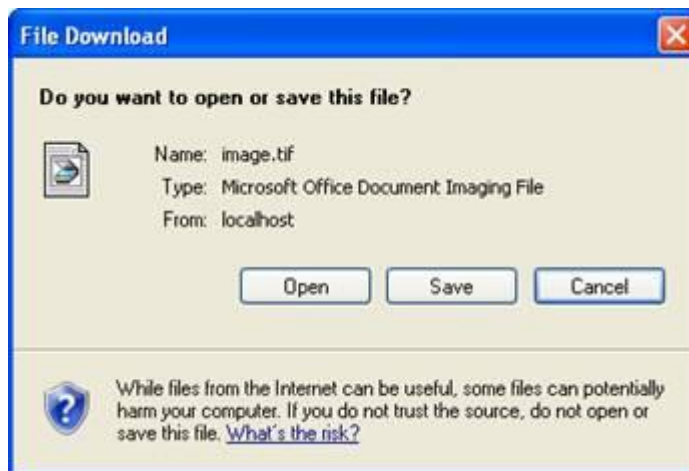


Click the PDF icon or the **View Original** button to open the image. Click **Download** to download the image to your computer.

**NOTE:** You must have Adobe Reader installed to view the image.

### Viewing a TIFF File

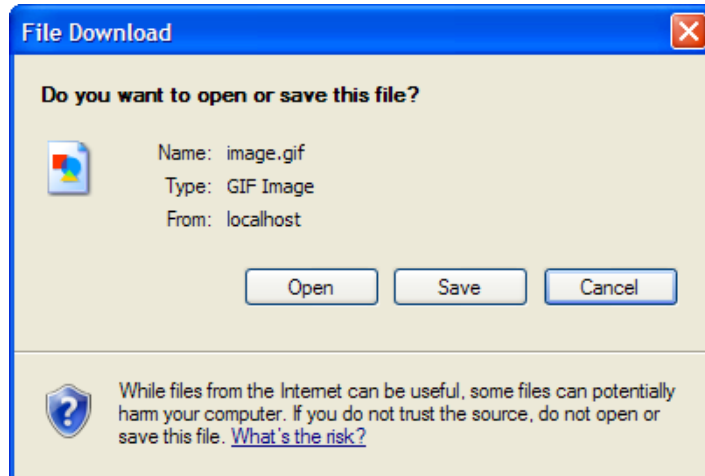
If the image is a TIFF file you will see a preview of the image. When you click the image or the **View Original** button, the following dialog appears.



Click **Open** to save the image to a temporary folder, and then display the image.

### Viewing a GIF File

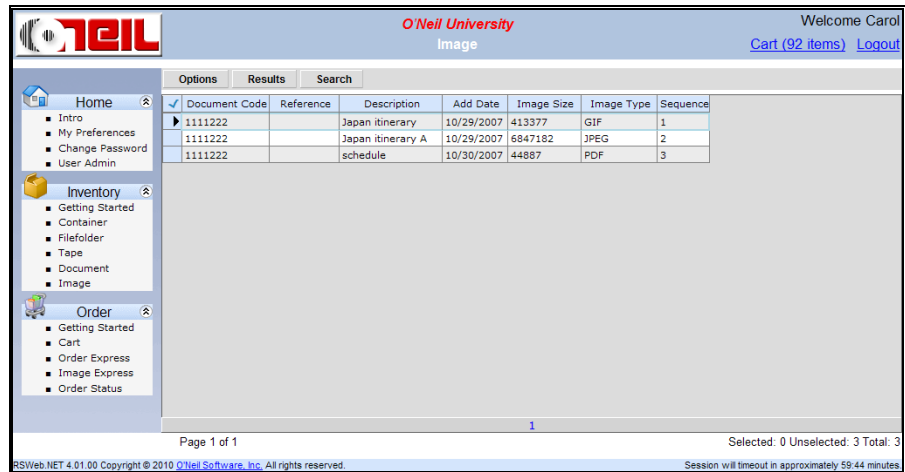
If the image size is larger than 13.1 megapixels, it will not display. Instead, you receive the following dialog.



Click **Open** to save the image to a temporary folder, and then display the image.

## Image

An image of a container, filefolder, or document can be scanned and stored in the database for viewing in RSWeb. To view an existing image, click the **Image** menu. The **Image** grid allows you to view images for multiple containers, filefolders, or documents.



Search for the containers, filefolders, or documents whose images you want to view.

## Edit

The **Edit** menu allows you to edit certain information regarding an image. You cannot, however, edit the image itself.

**Contained-in:** You can change the contained-in location of an image. Select Filefolder, Container, or Document and enter the Code.

**Sequence:** Sequence is used to identify what order multiple images appear in.

**Auto set sequence:** Select this check box if you want the system to automatically increment the sequence as images are added.

**Reference:** This field allows you to type some sort of identifier that can help group a set of images together.

**Description:** This is a description of the document.

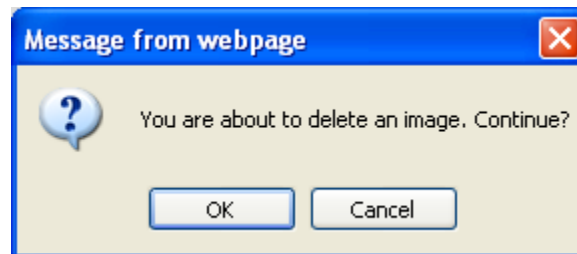
**User Defined Fields:** Text of your choice can be entered in the user defined fields. There are eight text fields and two date fields available.

To view the image you are editing, click **View Image**. The **Reset Form** button resets the displayed data back to its original value before any editing was done.

To save your changes, click **Submit**.

## Delete

To delete a document image, click the **Delete** menu option. The following prompt appears.



Click **OK** to delete the image.

---

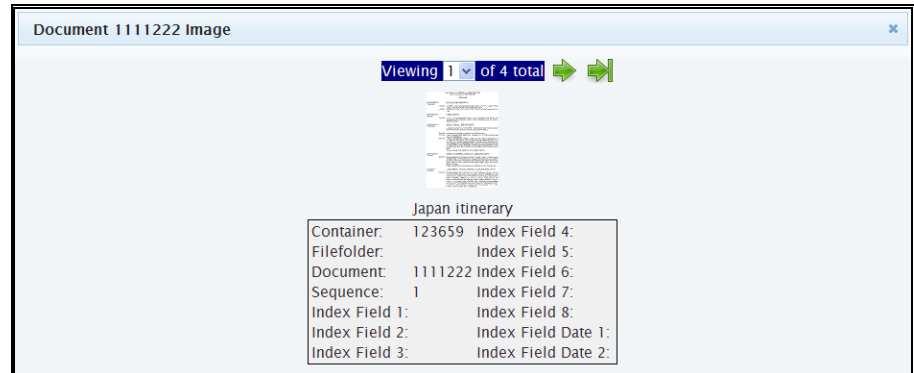
**NOTE:** If more than one image exists for the document, only the selected image is deleted. There is no global delete function available for images.

---



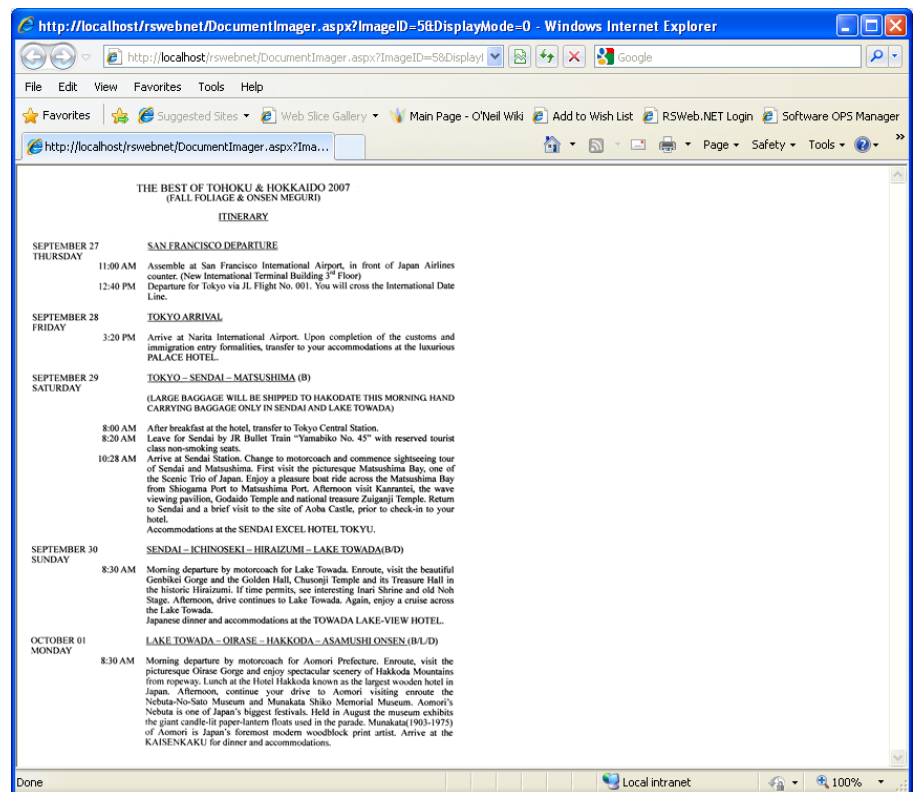
## View Image

The **View Image** menu option allows you to view the image.



A thumbnail view of the image displays. The document the image belongs to displays at the top of the screen. If you selected multiple images in the grid, you can use the arrows to move between the images.

Click the thumbnail to view the image in its original size and proportion. You can choose to open the file or save it to your computer. The file opens in your browser.

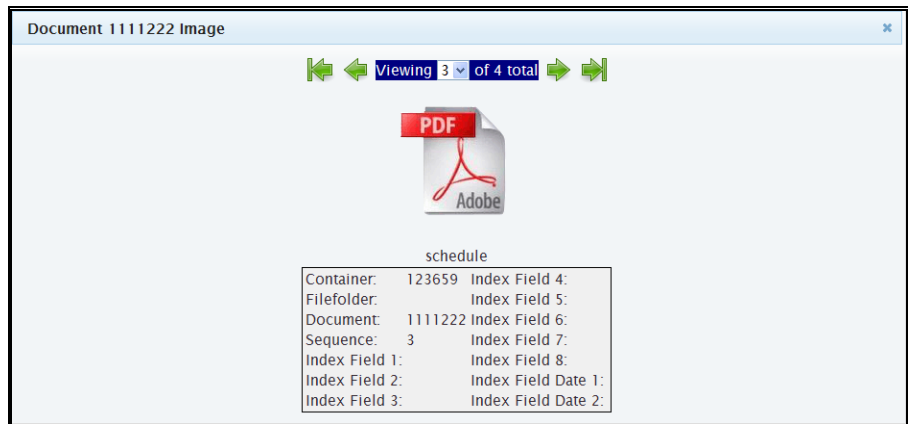


You can then zoom in by clicking on the image, and scroll to view the entire document.

When you have finished viewing the images, close the Image Viewer to return to the **Document** grid.

## Viewing a PDF File

If the image is a PDF, there will not be a preview of the image. A PDF icon appears instead.



Click the PDF icon or the **View Original** button to open the image. Click **Download** to download the image to your computer.

---

**NOTE:** You must have Adobe Reader installed to view the image.

---

## Viewing a TIFF File

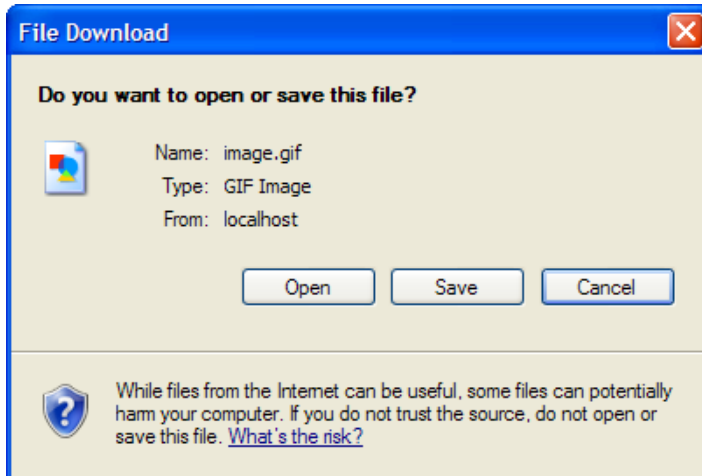
If the image is a TIFF file you will see a preview of the image. When you click the image or the **View Original** button, the following dialog appears.



Click **Open** to save the image to a temporary folder, and then display the image.

## Viewing a GIF File

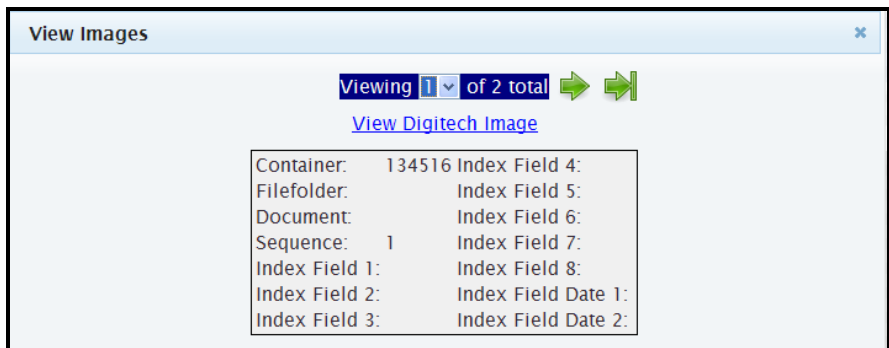
If the image size is larger than 13.1 megapixels, it will not display. Instead, you receive the following dialog.



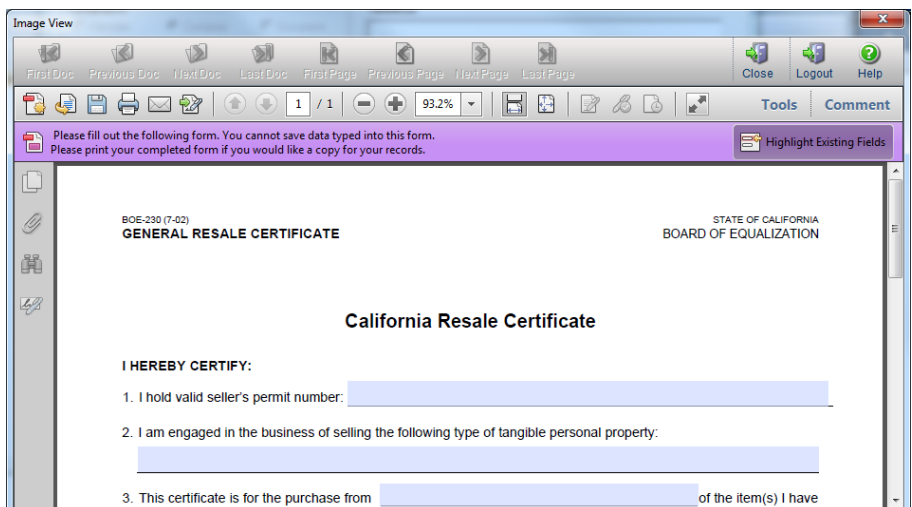
Click **Open** to save the image to a temporary folder, and then display the image.

### Viewing a Digitech Image

If the image is a Digitech image, a link is provided to the image.




Click the link and the ImageSilo viewer opens and displays the image.



Click the **X** in the top right corner to close the ImageSilo viewer.

# Print

To print a list of image information, select the images and from the **Options** menu, select **Print**. The following print dialog appears.



O'Neil University

Welcome Carol

Print Selected Image Results

[Cart \(92 items\)](#) [Logout](#)

Print Page

Back to Results

Font Size 

8pt

Image

Document Code	Reference	Description	Add Date	Image Size	Image Type	Sequence
1111222		Japan itinerary	10/29/2007	413377	GIF	1

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved.

Session will timeout in approximately 57:29 minutes.

Click **Print Page** to print the image information. Click **Back to Results** to return to the **Image** grid.

# Order

---

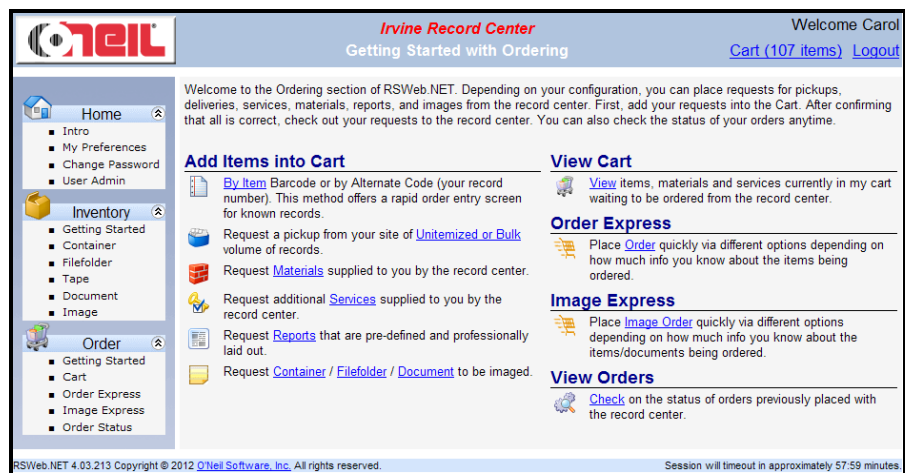
## Introduction

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

---

## Getting Started

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



---

## Cart

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

---

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

---

The Cart link in the top right corner of the screen shows the number of items (Quantity in Cart) in the cart and provides quick navigation to the Cart page.

The Quantity in Cart displayed is the actual number of items in the Cart and not the number of items in the **Cart** grid. If you clear (not remove) some items in the **Cart** grid, the Quantity in Cart is not changed as the items are still in the Cart. The items are temporarily cleared from the **Cart** grid and can be loaded into the Cart again. Removing items from the Cart changes the Quantity in Cart as the items are deleted from the Cart. Placing web orders/workorders (which removes items from the cart), also updates the Quantity in Cart.


The tooltip of the Cart link in the header shows the last updated date/time of the Quantity in Cart.

Clicking on the Cart link in any part of the web site navigates to the **Cart** grid. If you are already in the **Cart** grid, clicking the Cart link reloads all the items in the Cart to the **Cart** grid.

---

## Add Items to Cart

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



Home

- Intro
- My Preferences
- Change Password
- User Admin

Inventory

- Getting Started
- Container
- Filefolder
- Tape
- Document
- Image

Order

- Getting Started
- Choose a section to work in
- Order Express
- Image Express
- Order Status

O'Neill University

Cart

Cart (92 items)

Logout

Options	Add to Cart	Results	Search	Checkout				
Track#	Service Type	Details	Quantity	Requestor	Cost Center	Customer Comment	Placed In Cart...	Placed In
389	Delivery	Container 12 -ZX	1	Jack			CAROL	1/24/2
390	Delivery	Container 134505 [MMM]	1	Jack			CAROL	1/24/2
392	Delivery	Container 134518 [144]	1	Jack			CAROL	1/24/2
393	Delivery	Container 123659	1	Jack			CAROL	1/24/2
394	Delivery	Container 134503 [148]	1	Jack			CAROL	1/24/2
405	Delivery	Container 134516 [142]	1				CAROL	1/31/2
406	Delivery	Container 134520 [160]	1				CAROL	1/31/2
407	Delivery	Container 134503 [148]	1	Mary Smith	300	Deliver to side ent.	CAROL	1/31/2
417	Imaging	DOC011W (Medical recor...	1	Jack Bennett			CAROL	3/7/26
425	Delivery	Filefolder 1111222	1	Cathie			CAROL	3/24/2
428	Delivery	Filefolder 1112569	1	Cathie			CAROL	3/24/2
439	Delivery	Filefolder 1111999	1	John Smith	230		CAROL	3/24/2
441	Imaging	DOC012W (Tour Kg-1)	1				CAROL	4/18/2
445	Imaging	DOC0005 (Patient Chart...	1				CAROL	4/18/2
447	Imaging	1111223	1				CAROL	4/18/2
448	Delivery	Container 134500 [XYZ]	1				CAROL	4/18/2
473	Delivery	Container 134529 [169]	1				CAROL	8/19/2

Page 1 of 2

Selected: 0 Unselected: 80 Total: 80

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved.

Session will timeout in approximately 53:14 minutes

---

**NOTE:** The Cart grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

---

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

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

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

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

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

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

**Document Imaging Requests:** This is used for requesting an image to be made from a document. The image can then be viewed in RSWeb.

## Items

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

### Enter Items

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

The screenshot shows a web browser window with the O'Neil University logo and 'Items Entry' title. The user is logged in as 'Carol'. The form has two dropdown menus: 'Item Type' set to 'Container' and 'Entry Type' set to 'Barcode'. Below these is a table with 7 rows for entering item data. Each row has a 'Barcode' field and a larger 'Description' field. At the bottom, there is a checkbox for 'Continue without resolving invalid/multiple match items' and three buttons: 'Next', 'Clear Items', and 'Back to Cart'. The footer shows 'RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved.' and a session timeout warning.

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

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

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

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

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

RSWeb and the RS-SQL software that your record center uses identify account in three levels. The Level 1 Account usually refers to your company. The Level 2 Account usually refers to a department within your company. Then within

departments, RSWeb can identify a third level, perhaps a cost center, with the Level 3 Account. Your record center may not use all three levels.

If you only enter the Alt Code, there may be more than one item that matches the Alt Code. In this case, the software looks for a possible match. If there is more than one item found for the Alt Code, a link titled 'Select items to add' is displayed to the right of the row. Click the link to go to the **Item Entry Verification** page to select the items to add to the cart. For more information, see the *Item Entry Verification* section later in this chapter.

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

---

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

---

When all items have been entered, click **Next**.

If any invalid items are entered, you are required to resolve them before continuing on to the next page. For items not found, you can correct the item code or blank out the row. Alternatively, you can select the *Continue without resolving invalid/multiple match items* check box. The unresolved invalid items will display on the **Add to Cart Summary** screen with a description of the error in the Status column. Click **Next** to continue.

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



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

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

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

Click **Add to Cart** to add the items to the cart. The **Add to Cart Summary** displays.

**O'Neil University**  
Add to Cart Summary

Welcome Carol  
[Cart \(94 items\)](#) [Logout](#)

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

Font Size

**Add to Cart Summary**

Service Type: Deliver (Bring the item to me.)  
Requestor: Joe Manning  
Cost Center: 66  
Comments: Please deliver to loading dock.

Barcode	Type	Alternate Code	Account	Status
134500	Container	KYZ	1000	Added to cart successfully.
134501	Container	KYY	1000	Added to cart successfully.

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

If an item cannot be added to the cart, a message is displayed.

Click **Order Now** to place your order, or click **View Cart** to return to the Cart.

### Item Entry Verification

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

**O'Neil University**  
Items Entry

Welcome Carol  
[Cart \(94 items\)](#) [Logout](#)

Some items not resolved. See below for details.

Item Type:  Entry Type:

	Alt Code	Account	
1	<input type="text" value="xyz"/>	<input type="text"/>	<a href="#">Select items to add</a>
2	<input type="text"/>	<input type="text"/>	
3	<input type="text"/>	<input type="text"/>	
4	<input type="text"/>	<input type="text"/>	
5	<input type="text"/>	<input type="text"/>	
6	<input type="text"/>	<input type="text"/>	
7	<input type="text"/>	<input type="text"/>	

☐ Continue without resolving invalid/multiple match items

[Next](#) [Clear Items](#) [Back to Cart](#)

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

Multiple matches found. Please select items to add.

Add	Barcode	Alternate Code	Item Description	Account	Account Name
<input type="checkbox"/>	134500	XYZ		1000	Newport Bank
<input type="checkbox"/>	015120	XYZ		2000	Insurance Company
<input type="checkbox"/>	800006	XYZ		CITYHOSPIEXEC	

Print Page Back to Items Entry Add

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

All items with the matching Alt Code display.

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

Select the check box in the Add column next to the item or items you want to add. Click **Add** to return to the **Items Entry** screen.

Item Type: Container Entry Type: Alt Code

Alt Code	Account	Item found.
1 xyz	2000	Item found.
2		
3		
4		
5		
6		
7		

Continue without resolving invalid/multiple match items

Next Clear Items Back to Cart

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Click **Next** to continue adding your items to the cart.

## Search & Select

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

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

Choose Item Select Type:

- Container
- Filefolder
- Tape

Back to Cart

RSWeb.NET 4.01.00 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

Please select a quick search query name from the list below.

Containers Account

Description  
A list of containers by level 1 account code

☐ Clear All Items Currently on Grid

Account No.:

Search Back to Search & Select

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:29 minutes

Click the drop down arrow next to the list of quick queries to make your selection. A description of the quick query displays in the Description field. Depending on the quick query selected, additional fields may display for you to enter data.

Select the *Clear All Items Currently on Grid* check box if you want to clear all existing items from the grid before your results are returned. Otherwise, the new results will be added to the existing items already on the grid.

When you have made your selection and entered any required data, click **Search**. The query runs and all data matching the criteria is loaded onto the grid.

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

### Load from File

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

---

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

---

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

Item Type  
Container

File  Browse...

Separator  
Comma ,

Type of Criteria  
Barcodes

Upload Back to Cart

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes

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

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

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

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

Click **Upload**.

Some items not resolved. See below for details.

Item Type	Entry Type
Container	Barcode

Barcode	Status
1 134504	Item found.
2 134505	Item found.
3 134506	Item found.
4 134507	Item found.
5 134509	Item found.
6 134510	Item found.
7 134511	Item found.

☐ Continue without resolving invalid/multiple match items

[Next](#) [Back to File Upload](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 58:59 minutes.

The **File Upload Results** screen displays indicating if any errors occurred.

If any invalid items are entered, you are required to resolve them before continuing on to the next page. For items not found, you can correct the item code or blank out the row. Alternatively, you can select the *Continue without resolving invalid/multiple match items* check box. The unresolved invalid items will display on the **Add to Cart Summary** screen with a description of the error in the Status column. Click **Next** to continue.

Service Type: Deliver (Bring the item to me.)

Requestor:  Cost Center:

Comments:

[Add to Cart](#) [Back to File Upload Results](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:59 minutes.

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

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

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

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

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

**O'Neil University**  
Add to Cart Summary

Welcome Carol  
[Cart \(114 items\)](#) [Logout](#)

[Print](#) [View Cart](#) [Order Now](#) [Back to File Upload](#)

Font Size 8pt

### Add to Cart Summary

**Service Type:** Deliver (Bring the item to me.)  
**Requestor:** Joe Gaven  
**Comments:** Deliver to 2nd floor.

Barcode	Type	Alternate Code	Account	Status
134504	Container	TTT	1000V5000	Added to cart successfully.
134505	Container	MMM	1000V5000	Added to cart successfully.
134506	Container	151	1000V5000	Added to cart successfully.
134507	Container	152	1000V5000	Added to cart successfully.
134509	Container	135	1000V5000	Added to cart successfully.
134510	Container	136	1000V5000	Added to cart successfully.
134511	Container	137	1000V5000	Added to cart successfully.
134512	Container	138	1000V5000	Added to cart successfully.
134513	Container	139	1000V5000	Added to cart successfully.
134610	Container	AU-210	2000	Added to cart successfully.

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Click **Order Now** to place your order, or click **View Cart** to go to the cart. The items added to the cart are selected so they are easily identifiable.

## Bulk Items

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

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

**Irvine Record Center**  
Unitemized Services

Welcome Carol  
[Cart \(107 items\)](#) [Logout](#)

**Service Type**  
Pickup (Pick up the item(s) at my business.)

**Container Quantity**  
0

**Container Comments**

**Filefolder Quantity**  
0

**Filefolder Comments**

**Tape Quantity**  
0

**Tape Comments**

[Add to Cart](#) [Back to Cart](#)

RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes.

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

**Quantity:** Enter the number of containers, filefolders, and tapes that are going to the record center. This allows the record center to make sure they have enough space in the truck. If you are dropping the items off at the record center, they may need to plan how much assistance you will need. The maximum quantity allowed is

determined by your record center. If you enter a number larger than the maximum, the field is changed to the maximum quantity and an error message displays at the top of the page.

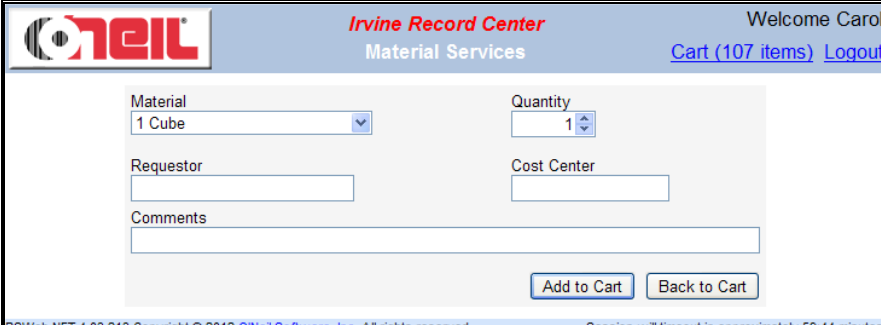
**Comments:** When adding bulk items to the cart, you can describe the item by entering container, filefolder or tape comments. These comments are then transferred to the final workorder. You can enter a single line up to 81 characters. Once the order is checked out to a web order and the record center converts the web order to a workorder, these comments are posted to the Workorder Notes with the web user's name.

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

## Materials

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

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



The screenshot shows a web form titled "Irvine Record Center Material Services". The header includes the O'Neil logo, the title "Irvine Record Center Material Services", and a welcome message "Welcome Carol" with links for "Cart (107 items)" and "Logout". The form fields include: "Material" (a dropdown menu showing "1 Cube"), "Quantity" (a spinner box showing "1"), "Requestor" (a text box), "Cost Center" (a text box), and "Comments" (a large text area). At the bottom right are "Add to Cart" and "Back to Cart" buttons. The footer contains copyright information: "RSWeb.NET 4.03.213 Copyright © 2012 O'Neil Software, Inc. All rights reserved." and a session timeout notice: "Session will timeout in approximately 59:44 minutes."

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

**Quantity:** Enter the quantity you are requesting.

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

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

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

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

## Services

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

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

**Other Services:** Click the drop down arrow to select the type of service you are requesting.

**Quantity:** Enter the quantity.

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

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

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

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

## Reports

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

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

**O'Neil University**  
Report Services

Welcome CAROL [Logout](#)

Report Type  
Containers to Destroy Rpt

Report Profile  
Defaults  
Destroy Dates

Requestor  Cost Center

Comments

[Next](#) [Back to Cart](#)

RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

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

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

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

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

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

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

The Report Options screen for the report and profile you selected appears. The values that have been selected by your record center display, but you can make changes to any field.

**O'Neil University**  
Report Options

Welcome CAROL [Logout](#)

Please select the following options for your report.

Title

---

<b>Fonts</b>	<b>Margin Offsets (inches)</b>	<b>Report Options</b>
<input type="checkbox"/> Override all font settings	Top <input type="text" value="0.0"/>	<input type="checkbox"/> Combine Level 2 with Level 1
Font Face <input type="text" value="Courier"/>	Left <input type="text" value="0.0"/>	<input type="checkbox"/> Combine Level 3 with Level 2
Font Size <input type="text" value="12pt"/>	Right <input type="text" value="0.0"/>	<input type="checkbox"/> Summary Only
Orientation <input type="text" value="Portrait"/>	Bottom <input type="text" value="0.0"/>	<input type="checkbox"/> Print Descriptions
	<input checked="" type="checkbox"/> Equal Margins	<input type="checkbox"/> Print Contents

[Next](#) [Back](#) [Back to Cart](#)

RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.



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

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

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

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

Select the Summary Only check box to print summary information. Select the Print Descriptions check box to include all data in the Description field for each item on the report. Check the Print Contents check box to include all data in the Contents field for each item on the report.

**Report Options:** This section of the screen displays Report Options. The available choices will vary depending on the report you have selected.

Once you have made any desired changes, click **Next**. The Report Columns screen appears.

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

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

**Sort Order:** In the Sort Order section, you can set your report to sort in any order you like, with certain limits. If there are predetermined sort criteria, the first couple fields are filled in and you may not be able to change them. Click the down arrow to the right of the field to see the list of fields that will appear on the report. You can choose to sort by any of them. You can also choose to have the fields sort by ascending or descending order by clicking the down arrow next to that field.

When you are finished making any changes, click **Next**. If a customized query has been assigned to the selected profile by your record center, it will appear.

---

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

---



The screenshot shows a web form titled "O'Neil University Report Query". The header includes the O'Neil logo, the text "O'Neil University Report Query", and a welcome message "Welcome CAROL" with a "Logout" link. Below the header, a green instruction reads "Please fill out each field of the query for your report." The main form area contains a label "Account No.:" followed by a text input field. At the bottom of the form are three buttons: "Add To Cart", "Back", and "Back to Cart". The footer of the page contains copyright information: "RSWeb.NET 3.03.00 Copyright © 2007 O'Neil Software, Inc. All rights reserved." and a session timeout notice: "Session will timeout in approximately 60:00 minutes."

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

## Document Imaging Request

In the Cart, you can add a request for an image to be made from a document. The image can then be viewed in RSWeb. From the **Add to Cart** menu, select **Document Imaging Request**.

**O'Neil University**  
Add to Cart

Welcome Carol  
[Cart \(96 items\)](#) [Logout](#)

Document Code \*

Service Type  
Imaging (Image the item.) ▼

Requestor  Cost Center

Comments

**Image Info**

Reference

Description

Index Field 1  Index Field 2

Index Field 3  Index Field 4

Index Field 5  Index Field 6

Index Field 7  Index Field 8

Index Field Date 1  Index Field Date 2

Imaging Instructions \*

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes

**Document Code:** Enter the document for which you want an image made. If the document is not already in the database, click **Add Document** to add a new document.

**Service Type:** This field is populated with the service type Imaging, and is read only.

**Requestor:** Enter the person requesting the image. This field is optional.

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

**Comments:** Enter any additional comments for the record center.

**Reference:** This field allows you to type some sort of identifier that can help you group a set of images together.

**Description:** Type a description of the image.

**User Defined Fields:** Text of your choice can be entered in the user defined fields. There are eight text fields and two date fields available.

**Imaging Instructions:** Type any special imaging instructions for your record center. This field is required.

Click **Add to Cart** to add the request to the Cart. Add another request, or if you are finished, click **Done**. The request is added to the cart.

**O'Neil University**  
Add to Cart Summary

Welcome Carol  
[Cart \(116 items\)](#) [Logout](#)

Print View Cart Order Now

Font Size 8pt

### Add to Cart Summary

Service Type: Imaging (Image the item.)

Code	Type	Requestor	Cost Center	Imaging Instructions	Status
1111222	Document	Marcus	680A	Scan all pages	Added to cart successfully.

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes

Once your request has been fulfilled by the record center, you can view the image in RSWeb. Load your order onto the **Order Status** grid. If it has been fulfilled, a link appears in the **Order Detail** dialog.

**O'Neil University**  
Order Detail

Welcome Carol  
[Cart \(115 items\)](#) [Logout](#)

Print Page Back to Results

### Order Detail

Batch Order Number: 249 Tracking Number: 627

Ordered by: CAROL on Friday, December 10, 2010 at 8:58:47 AM

Placed In Cart by: CAROL on Friday, December 10, 2010 at 8:43:31 AM

Status: Fulfilled Status Date: Friday, December 10, 2010 at 9:01:18 AM

Service Type: Imaging  
Service Priority: 3 HOUR  
Requested Fulfillment Date/Time:  
Workorder Account: 1000

Workorder Number: 11125222

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

Detail: 1111222 (Medical Records)  
Quantity: 1

Your images are ready. Click the link below to view or download the images.

[Download or view your images](#)

Requestor: Marcus Cost Center: 680A

Customer Comment:  
Notes:  
Record Center Comment:

Image Reference:  
Image Description:  
Index Field 1: Index Field 2:  
Index Field 3: Index Field 4:  
Index Field 5: Index Field 6:  
Index Field 7: Index Field 8:  
Index Field Date 1: Index Field Date 2:  
Imaging Instructions:  
Scan all pages

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 54:14 minutes

Click the link to download or view your image.

## Edit Items in Cart

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

Information regarding the item displays at the top of the screen. This information is read-only. Depending on the type of service you are editing, you may be able to edit the Quantity, Requestor, Cost Center, and Comments fields.

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

When you have made your changes, click **Update**.

## View Details of Items in Cart

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

To return to the cart, click the **Back to Cart** button.

## Create Order/Workorder

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

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

## Create an Order

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

Track#	Service Type	Details	Quantity	Requestor	Cost Center	Customer Comment	Placed In Cart
580	Pickup	Container 134602 [AU-20...	1	cathie			CAROL
581	Pickup	Container 134603 [AU-20...	1	cathie			CAROL
582	Pickup	Container 134604 [AU-20...	1	cathie			CAROL
583	Pickup	Container 134605 [AU-20...	1	cathie			CAROL
584	Pickup	Container 134606 [AU-20...	1	cathie			CAROL
585	Delivery	Container 134501 [XYX]	1				CAROL
586	Delivery	Container 134504 [TTT]	1				CAROL
587	Delivery	Container 269856	1	Cathie	66		CAROL
588	Delivery	Container 543216	1	Cathie	66		CAROL
589	Delivery	Container 961123	1	Cathie	66		CAROL
590	Delivery	Container 134500 [XYZ]	1	Cathie	66		CAROL
595	Imaging	Container - blue contain...	1				CAROL
596	Imaging	Container - green contain...	1				CAROL
598	Imaging	Container - Container wit...	1	Cathie	66		CAROL
599	Delivery	Container 134501 [XYX]	1	Joe	300	Please deliver to shippi...	CAROL
600	Delivery	Container 134502 [PPP]	1	Joe	300	Please deliver to shippi...	CAROL
601	Delivery	Container 134503 [148]	1	Joe	300	Please deliver to shippi...	CAROL
602	Imaging	DOC0007000000000	1	John Smith	66		CAROL

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

Message from webpage

? You are about to check out 3 item(s). Continue?

OK Cancel

Click **OK** to continue. The following screen appears.

Workorder Account: 1000

Contact: Jane Hutter

Address Line 1: 1234 Park Ave.

Address Line 2: New York, NY 11232

Address Line 3:

Phone: 212-555-3242

Fax: 212-555-3255

Service Priority: 3 Hour Rush

Requested Fulfillment Date/Time:

Use default delivery address

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

Add Notes Submit Orders Back to Cart

Enter your account number and your contact information. To use the default address for the account entered, click **Use default delivery address**. To choose a different delivery address, click the **Choose Address** button. An address grid is displayed with all available addresses for the account.

Account	Description	Contact	Address 1	Address 2	Address 3	Phone	
1000	Default Mail Address	Jim Smith	1234 Park Ave.	New York, NY 11232		212-555-3242	21
1000	Default Pick/Del Address	Jane Hutter	1234 Park Ave.	New York, NY 11232		212-555-3242	21
1000	John's address	John Hutter	1234 Park Ave.	New York, NY 11232		212-555-3242	21
1000\5000	Default Mail Address	Jim Smith	1234 Park Ave.	New York, NY 11232		212-555-3242	21
1000\5000	Default Pick/Del Address	Jane Hutter	1234 Park Ave.	New York, NY 11232		212-555-3242	21
1000	Legal Dept. Deliveries	Andrew Puzder	1300 Park Ave.	New York, NY 11232		212-555-3243	21

Click a row to select that address, and the address fields are automatically populated. If you want to use the same account and address the next time you create an order, select the check box below the address fields.

Click the **Add Notes** button to add any Workorder Notes for the order.

Notes

Submit Clear Text Back to Order


The Notes text box is used to enter notes that describe the Web order. You can enter up to 512 characters.

Click **Clear Text** to clear the text box. This will only take effect if **Submit** is clicked. Click **Back to Order** to cancel the editing and return to the order.

Once you have finished entering your notes, click **Submit** to save the notes. The notes will be added to the Order Summary.

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

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



**O'Neil University**  
 Order Summary

Welcome Carol  
[Cart \(96 items\)](#) [Logout](#)

[Print Page](#)
[Back to Cart](#)

### Order Summary

3 item(s) ordered, 0 item(s) rejected.

Ordered by: CAROL on Monday, December 13, 2010 at 10:56:42 AM  
 Service Priority: Standard Service  
 Requested Fulfillment Date/Time:  
 Batch Order Number: 250

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

Track#	Service Type	Details	Qty	Requestor	Cost Center
599	Delivery	Container 134501 [XYX]	1	Joe	300
600	Delivery	Container 134502 [PPP]	1	Joe	300
601	Delivery	Container 134503 [148]	1	Joe	300


RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.
 Session will timeout in approximately 60:00 minutes.

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

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

## Create a Workorder

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



**O'Neil University**  
 Cart

Welcome Carol  
[Cart \(99 items\)](#) [Logout](#)

[Options](#)
[Add to Cart](#)
[Results](#)
[Search](#)
[Checkout](#)

[Home](#)

- Intro
- My Preferences
- Change Password
- User Admin

[Inventory](#)

- Getting Started
- Container
- Filefolder
- Tape
- Document
- Image

[Order](#)

- Getting Started
- Cart
- Order Express
- Image Express
- Order Status

Track#	Service Type	Details	Quantity	Requestor	Cost Center	Customer Comment	Placed In Cart
589	Delivery	Container 961123	1	Cathie	66		CAROL
590	Delivery	Container 134500 [XYZ]	1	Cathie	66		CAROL
595	Imaging	Container - blue container	1				CAROL
596	Imaging	Container - green contain...	1				CAROL
598	Imaging	Container - Container wit...	1	Cathie	66		CAROL
602	Imaging	DOC0007000000000	1	John Smith	66		CAROL
603	Imaging	DOC0008000000000	1	John Smith	66		CAROL
604	Delivery	Container 134500 [XYZ]	1	Joe Manning	66	Please deliver to loadin...	CAROL
605	Delivery	Container 134501 [XYX]	1	Joe Manning	66	Please deliver to loadin...	CAROL
622	Delivery	Container 134511 [137]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
623	Delivery	Container 134512 [138]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
624	Delivery	Container 134513 [139]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
625	Delivery	Container 134610 [AU-21...	1	Joe Gaven		Deliver to 2nd floor.	CAROL
626	Report Create	Containers to Destroy Rpt	1				CAROL
631	Delivery	Container 134601 [AU-20...	1	Margie	96A	Please deliver to 4th fl...	CAROL
632	Delivery	Container 134603 [AU-20...	1	Margie	96A	Please deliver to 4th fl...	CAROL
633	Delivery	Container 134604 [AU-20...	1	Margie	96A	Please deliver to 4th fl...	CAROL

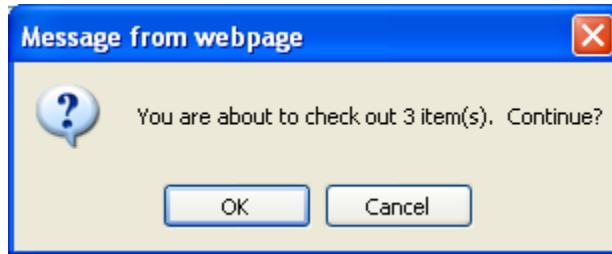
Page 2 of 2

Selected: 3 Unselected: 96 Total: 99

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.
 Session will timeout in approximately 58:44 minutes.

From the **Checkout** menu, select **Workorder**. The following message appears.





Click **OK** to continue.

If any of the items you are adding to the cart belong to a set of items and your record center has turned on the feature that checks for sets, the following message appears.

Select one of the available options.

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

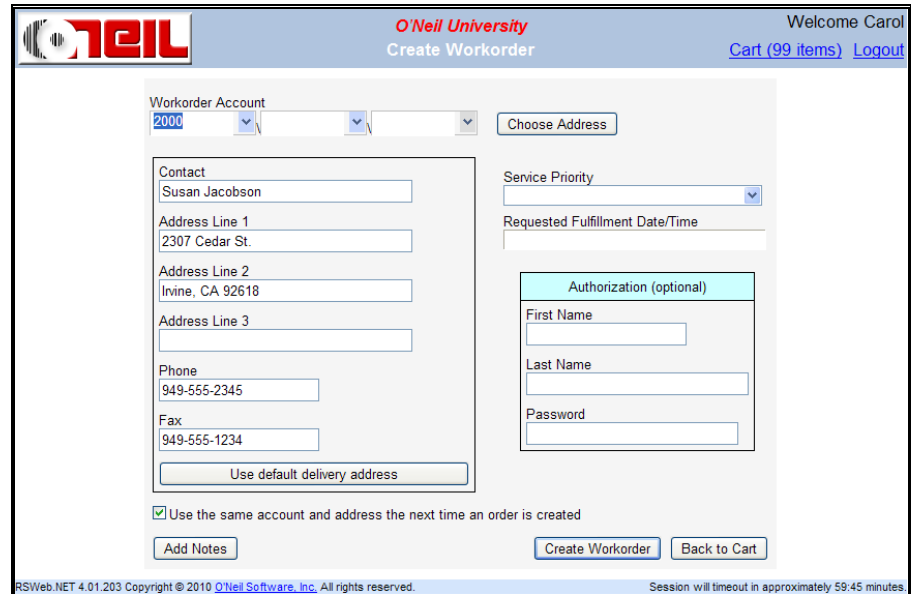
**Add item(s) in set to workorder and continue with workorder creation:** All additional items in the set are added to the workorder.

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

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

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

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



Workorder Account: 2000

Contact: Susan Jacobson

Address Line 1: 2307 Cedar St.

Address Line 2: Irvine, CA 92618

Address Line 3:

Phone: 949-555-2345

Fax: 949-555-1234

Service Priority:

Requested Fulfillment Date/Time:

Authorization (optional):

First Name:

Last Name:

Password:

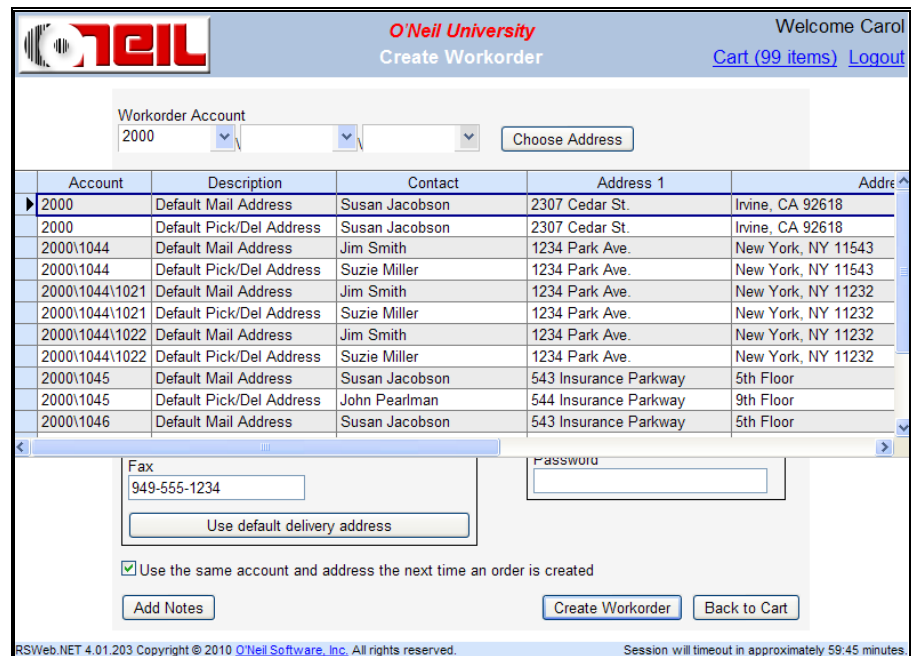
Use default delivery address

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

Add Notes Create Workorder Back to Cart

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

Enter your account number and your contact information. To use the default address for the account entered, click **Use default delivery address**. To choose a different delivery address, click the **Choose Address** button. An address grid is displayed with all available addresses for the account.



Account	Description	Contact	Address 1	Address 2
2000	Default Mail Address	Susan Jacobson	2307 Cedar St.	Irvine, CA 92618
2000	Default Pick/Del Address	Susan Jacobson	2307 Cedar St.	Irvine, CA 92618
2000\1044	Default Mail Address	Jim Smith	1234 Park Ave.	New York, NY 11543
2000\1044	Default Pick/Del Address	Suzie Miller	1234 Park Ave.	New York, NY 11543
2000\1044\1021	Default Mail Address	Jim Smith	1234 Park Ave.	New York, NY 11232
2000\1044\1021	Default Pick/Del Address	Suzie Miller	1234 Park Ave.	New York, NY 11232
2000\1044\1022	Default Mail Address	Jim Smith	1234 Park Ave.	New York, NY 11232
2000\1044\1022	Default Pick/Del Address	Suzie Miller	1234 Park Ave.	New York, NY 11232
2000\1045	Default Mail Address	Susan Jacobson	543 Insurance Parkway	5th Floor
2000\1045	Default Pick/Del Address	John Pearlman	544 Insurance Parkway	9th Floor
2000\1046	Default Mail Address	Susan Jacobson	543 Insurance Parkway	5th Floor

Fax: 949-555-1234

Password:

Use default delivery address

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

Add Notes Create Workorder Back to Cart

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

Click a row to select that address, and the address fields are automatically populated. If you want to use the same account and address the next time you create a workorder, select the check box below the address fields.

Click the **Add Notes** button to add any Workorder Notes for the workorder. If the workorder contains bulk items, the comments entered for the bulk items will be automatically transferred to the Add Notes page. The notes display the last and first name of the web user that placed the item in the cart, as well as their comments.

Notes

Ask 4th floor receptionist to call Susan at x3566

Submit Clear Text Back to Workorder

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:29 minutes

You can edit the bulk items comments along with entering notes that describe the workorder. You can enter up to 512 characters. Once you have finished entering your notes, click **Submit** to save the notes. The notes are added to the Create Workorder Summary.

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

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

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

Print Page Back to Cart

**Create Workorder Summary**

3 item(s) ordered, 0 item(s) rejected.

Ordered by: CAROL on Monday, December 13, 2010 at 1:56:17 PM

Requested Fulfillment Date/Time:

Batch Order Number: 253

Notes:  
Ask 4th floor receptionist to call Susan at x3566

Workorder Account: 2000

Susan Jacobson  
2307 Cedar St.  
Irvine, CA 92618  
Phone: 949-555-2345  
Fax: 949-555-1234

Track#	Workorder	Service Type	Details	Qty	Requestor	Cost Center
634	11125225	Delivery	Container 134601 [AU-201]	1	Margie	96A
635	11125225	Delivery	Container 134603 [AU-203]	1	Margie	96A
636	11125225	Delivery	Container 134604 [AU-204]	1	Margie	96A

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes

The summary displays the number of items that were ordered, as well as the number of items that were rejected for some reason.

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

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

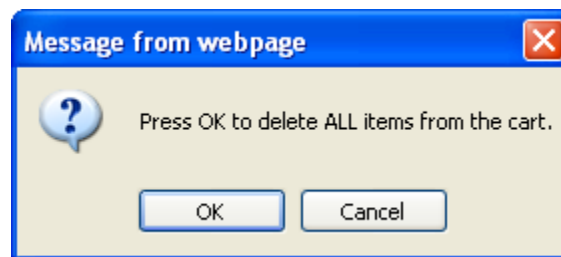
---

## Remove Items from Cart

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

### Remove All Rows

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



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

### Remove Current Row

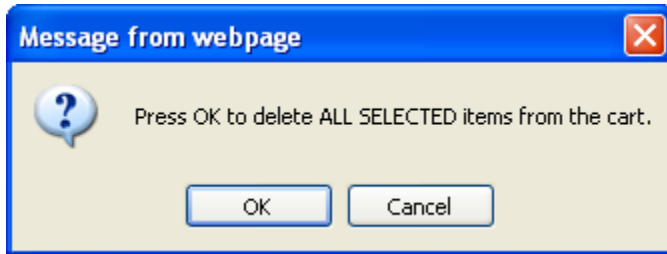
To remove only the item that is currently selected, from the **Results** menu, select **Remove Current Row**. The following prompt appears.



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

### Remove Selected Rows

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



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

---

## Order Status

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

---

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

---

The screenshot shows the "Search Orders" interface of the O'Neil University RSWeb system. The top header bar is blue and contains the O'Neil logo, the text "O'Neil University Search Orders", and a "Welcome CAROL" message with a "Logout" link. A left-hand navigation menu is expanded to the "Order" section, which includes links for "Getting Started", "Order Express", "Cart", and "Order Status". The main content area is a light gray box with several search criteria: "Batch Order Number Range", "Tracking Number Range", "Workorder Number Range", "Begin (Date Ordered Range)" with a calendar icon, "End (Date Ordered Range)" with a calendar icon, "Check Status of Orders" with a dropdown menu showing "-- Select One --", and "Ordered By" with a dropdown menu. A "Search" button is located at the bottom right of the search criteria box. At the very bottom of the page, a status bar contains the text "RSWeb.NET 3.06.219 Copyright © 2008 O'Neil Software, Inc. All rights reserved." and "Session will timeout in approximately 58:59 minutes."

The screenshot shows the 'Search Orders' page of the O'Neil University web application. On the left is a navigation menu with three main sections: 'Home' (Intro, My Preferences, Change Password, User Admin), 'Inventory' (Getting Started, Container, Filefolder, Tape, Document, Image), and 'Order' (Getting Started, Cart, Order Express, Image Express, Order Status). The main area has search filters: 'Batch Order Number Range', 'Tracking Number Range', 'Workorder Number Range', 'Begin (Date Ordered Range)' and 'End (Date Ordered Range)' (each with a checkbox and a date picker), 'Check Status of Orders' (a dropdown menu), and 'Ordered By' (a dropdown menu). A 'Search' button is located at the bottom right of the search area. The footer contains the text 'RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 60:00 minutes.'

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

## Searching by Batch Number Range

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

This screenshot shows a close-up of the 'Batch Order Number Range' search field. The text '132, 134, 140-145' is entered into the input box, demonstrating how multiple batch numbers and a range can be specified.

---

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

---

## Searching by Tracking Number Range

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

---

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

---

## Searching by Workorder Number Range

Searching by workorder number works similar to searching by batch or tracking number. The difference is that this field is alphanumeric. To search for orders by workorder number, you can enter a single workorder number, more than one workorder number, a range of workorder numbers, or a combination. Multiple numbers can be separated by a comma or dash.

<b>Workorder Number Range</b>
1, DEP15000, DD000034-DE000050

---

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

---

## Searching by Date Range

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

## Searching by Status

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

### ***Submitted***

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

### ***Scheduled***

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

### ***Workorder***

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

### ***Fulfilled***

Your order has been fulfilled.

### ***On Hold***

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

### ***Cancelled***

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

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

## Searching by Ordered By

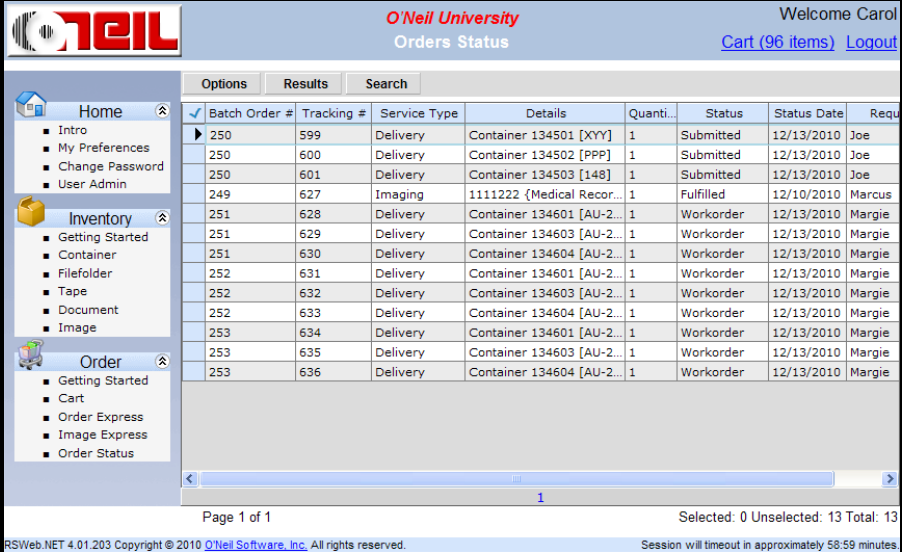
To check the status of orders placed by a specific user, use the Ordered By field. Click the drop down arrow to select the user you want. If you are a User Administrator, all users you have access to appear in the list. If you are not a User Administrator, only your name appears.

## Combining Search Criteria

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

## Search Results

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




Batch Order #	Tracking #	Service Type	Details	Quantity	Status	Status Date	Requested by
250	599	Delivery	Container 134501 [XYY]	1	Submitted	12/13/2010	Joe
250	600	Delivery	Container 134502 [PPP]	1	Submitted	12/13/2010	Joe
250	601	Delivery	Container 134503 [148]	1	Submitted	12/13/2010	Joe
249	627	Imaging	1111222 (Medical Recor...	1	Fulfilled	12/10/2010	Marcus
251	628	Delivery	Container 134601 [AU-2...	1	Workorder	12/13/2010	Margie
251	629	Delivery	Container 134603 [AU-2...	1	Workorder	12/13/2010	Margie
251	630	Delivery	Container 134604 [AU-2...	1	Workorder	12/13/2010	Margie
252	631	Delivery	Container 134601 [AU-2...	1	Workorder	12/13/2010	Margie
252	632	Delivery	Container 134603 [AU-2...	1	Workorder	12/13/2010	Margie
252	633	Delivery	Container 134604 [AU-2...	1	Workorder	12/13/2010	Margie
253	634	Delivery	Container 134601 [AU-2...	1	Workorder	12/13/2010	Margie
253	635	Delivery	Container 134603 [AU-2...	1	Workorder	12/13/2010	Margie
253	636	Delivery	Container 134604 [AU-2...	1	Workorder	12/13/2010	Margie

**NOTE:** The Orders Status grid can be sorted by column. Click on a column heading to sort in ascending order. Press **Ctrl** and click on a column heading to sort in descending order.

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




		<b>O'Neil University</b> Order Detail		Welcome Carol <a href="#">Cart (96 items)</a> <a href="#">Logout</a>	
<a href="#">Print Page</a>		<a href="#">Back to Results</a>			
<b>Order Detail</b>					
Batch Order Number: 253		Tracking Number: 636			
Ordered by: CAROL on Monday, December 13, 2010 at 1:56:17 PM					
Placed In Cart by: CAROL on Monday, December 13, 2010 at 1:46:38 PM					
Status: Workorder		Status Date: Monday, December 13, 2010 at 1:56:18 PM			
Service Type: Delivery					
Service Priority:					
Requested Fulfillment Date/Time:					
Workorder Account: 2000					
Workorder Number: 11125225					
<b>Delivery Address:</b> Susan Jacobson 2307 Cedar St. Irvine, CA 92618 Phone: 949-555-2345 Fax: 949-555-1234					
Detail: Container 134604 [AU-204]					
Quantity: 1					
Requestor: Margie		Cost Center: 96A			
Customer Comment: Please deliver to 4th floor.					
<b>Notes:</b> Ask 4th floor receptionist to call Susan at x3566					
Record Center Comment:					
<small>RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:29 minutes.</small>					

Click the **Back to Results** button to return to the **Orders Status** grid.


## Retrieving a Web Report

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

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

 <span style="float: right;"> <b>O'Neil University</b>  Order Detail </span> <span style="float: right;"> Welcome Carol  <a href="#">Cart (96 items)</a> <a href="#">Logout</a> </span>	
<div> <div>Print Page</div> <div>Back to Results</div> </div>	
<b>Order Detail</b>	
<div> <div>Batch Order Number: 256</div> <div>Tracking Number: 639</div> </div>	
<div> <div>Ordered by: CAROL on Tuesday, December 14, 2010 at 8:58:51 AM</div> <div>Placed In Cart by: CAROL on Tuesday, December 14, 2010 at 8:58:20 AM</div> </div>	
<div> <div>Status: Submitted</div> <div>Status Date: Tuesday, December 14, 2010 at 8:58:51 AM</div> </div>	
<div> <div>Service Type: Report Create</div> <div>Service Priority:</div> <div>Requested Fulfillment Date/Time:</div> <div>Workorder Account: 1000</div> </div>	
<p>Your report is not yet complete. The link will appear here once your order has been fulfilled.</p>	
<div> <div>Criteria:</div> <div>Report Type: Containers by Account Rpt</div> <div>Query Criteria:</div> <div>Report Criteria:</div> <div> <div>BottomMargin: 0.00</div> <div>RightMargin: 0.00</div> <div>LeftMargin: 0.00</div> <div>TopMargin: 0.00</div> <div>Orientation: Portrait</div> <div>Title: Containers - Acct 1000</div> </div> </div>	
<div> <div>Requestor: Rosemary P.</div> <div>Cost Center: 300</div> </div>	
<div> <div>Customer Comment:</div> <div>Notes:</div> <div>Record Center Comment:</div> </div>	
<div> <div>RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.</div> <div>Session will timeout in approximately 59:45 minutes.</div> </div>	

If your report has been completed, the criteria displays along with instructions on how to access and save the report.

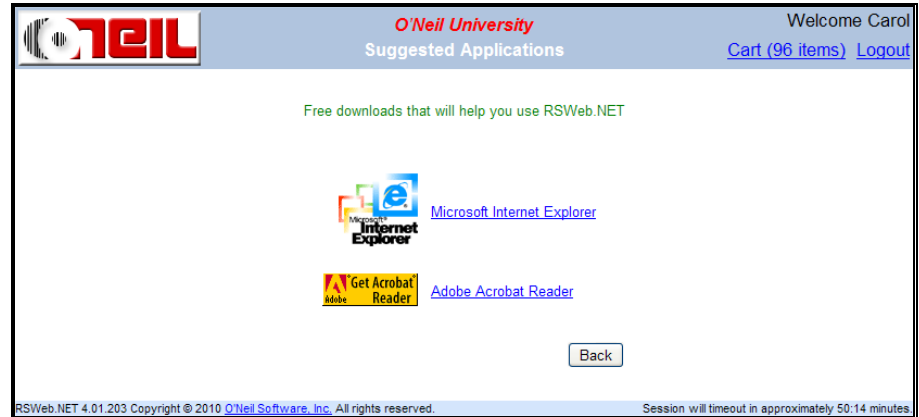
 <span style="float: right;"> <b>O'Neil University</b>  Order Detail </span> <span style="float: right;"> Welcome Carol  <a href="#">Cart (96 items)</a> <a href="#">Logout</a> </span>	
<div> <div>Print Page</div> <div>Back to Results</div> </div>	
<b>Order Detail</b>	
<div> <div>Batch Order Number: 256</div> <div>Tracking Number: 639</div> </div>	
<div> <div>Ordered by: CAROL on Tuesday, December 14, 2010 at 8:58:51 AM</div> <div>Placed In Cart by: CAROL on Tuesday, December 14, 2010 at 8:58:20 AM</div> </div>	
<div> <div>Status: Fulfilled</div> <div>Status Date: Tuesday, December 14, 2010 at 9:04:20 AM</div> </div>	
<div> <div>Service Type: Report Create</div> <div>Service Priority:</div> <div>Requested Fulfillment Date/Time:</div> <div>Workorder Account: 1000</div> </div>	
<p><b>Instructions:</b> To save your report, right click on the link below and choose "Save Target As...". You will be prompted for a name and a location. Ensure that the name you choose ends with a ".pdf" extension. The best choice for a location is usually somewhere such as your Desktop or your "My Documents" folder. Once the document is saved, it will be available on your local machine. Simply double clicking on the icon will launch the Acrobat Reader. No connection to the internet is needed to read the document. <b>You will need the free Acrobat Reader application from Adobe.com.</b> <a href="#">Please click here to go directly to the download area.</a></p> <p><a href="#">Download your report</a></p>	
<div> <div>Criteria:</div> <div>Report Type: Containers by Account Rpt</div> <div>Query Criteria:</div> <div>Report Criteria:</div> <div> <div>BottomMargin: 0.00</div> <div>RightMargin: 0.00</div> <div>LeftMargin: 0.00</div> <div>TopMargin: 0.00</div> <div>Orientation: Portrait</div> <div>Title: Containers - Acct 1000</div> </div> </div>	
<div> <div>Requestor: Rosemary P.</div> <div>Cost Center: 300</div> </div>	
<div> <div>Customer Comment:</div> <div>Notes:</div> <div>Record Center Comment:</div> </div>	
<div> <div>RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.</div> <div>Session will timeout in approximately 59:44 minutes.</div> </div>	

---

**NOTE:** Left-clicking the report link produces the following error message: You must right-click this link and choose “Save Target As...” then save the file with a .pdf file extension (i.e. MyReport.pdf).

---

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



---

## Order Express

The **Order Express** menu option provides different ways for you to quickly order an item. It can be used to order an item if you do not know its barcode. There are three different options for entering items.



**I know exactly what I want by barcode / alt code / description:** Select this option if you know the barcode, alt code, or description of the item you want.

**Search for what I want:** With this option, you can search for your item using whatever information you do have.

**The item I want is not currently registered:** Select this option if the item you want is not currently registered in the system.

## I Know Exactly What I Want

Selecting one of the links under this option takes you to the Items Entry screen.

Item Type: Container  
Entry Type: Barcode

	Barcode
1	
2	
3	
4	
5	
6	
7	

☐ Continue without resolving invalid/multiple match items

Next Clear Items Back to Order Express

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes.

Since you have already selected whether the item is a container, filefolder, or tape, the Item Type field is grayed out. Complete the other fields as usual. Click **Next** to continue.

Service Type: Deliver (Bring the item to me.)

Requestor: Cost Center:

Comments:

Add to Cart Back to Items Entry

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Complete the fields as usual. Click **Add to Cart** to add the items to the cart. The **Add to Cart Summary** displays.

Print View Cart Order Now Back to Order Express

Font Size: 8pt

### Add to Cart Summary

Service Type: Deliver (Bring the item to me.)  
Requestor: Roberta

Barcode	Type	Alternate Code	Account	Status
134504	Container	TTT	1000\5000	Added to cart successfully

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:14 minutes.

## Order Now

When you click the **Order Now** button, the items are added to the bottom of the Order Now grid. In the Order Now grid, the items that are added to the cart through Items Entry are highlighted.

Track#	Service Type	Details	Quantity	Requestor	Cost Center	Customer Comment	Placed In Cart
587	Delivery	Container 269856	1	Cathie	66		CAROL
588	Delivery	Container 543216	1	Cathie	66		CAROL
589	Delivery	Container 961123	1	Cathie	66		CAROL
590	Delivery	Container 134500 [XYZ]	1	Cathie	66		CAROL
595	Imaging	Container - blue container	1				CAROL
596	Imaging	Container - green contain...	1				CAROL
598	Imaging	Container - Container wit...	1	Cathie	66		CAROL
602	Imaging	DOC000700000000	1	John Smith	66		CAROL
603	Imaging	DOC000800000000	1	John Smith	66		CAROL
604	Delivery	Container 134500 [XYZ]	1	Joe Manning	66	Please deliver to loadin...	CAROL
605	Delivery	Container 134501 [XYX]	1	Joe Manning	66	Please deliver to loadin...	CAROL
622	Delivery	Container 134511 [137]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
623	Delivery	Container 134512 [138]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
624	Delivery	Container 134513 [139]	1	Joe Gaven		Deliver to 2nd floor.	CAROL
625	Delivery	Container 134610 [AU-21...	1	Joe Gaven		Deliver to 2nd floor.	CAROL
626	Report Create	Containers to Destroy Rpt	1				CAROL
640	Delivery	Container 134504 [TTT]	1	Roberta			CAROL

Page 2 of 2

Selected: 1 Unselected: 96 Total: 97

[Order](#) [Workorder](#) [Back to Order Express](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 57:29 minutes

Make sure the items you want to order are highlighted and click **Order** to submit an order, or **Workorder** to submit a workorder. The Order/Workorder screen appears and you can continue as usual.

## View Cart

If you prefer not to use Order Now, click View Cart. This button takes you to the cart where you can view your items and then place your order.

## Search for What I Want

If you don't know the barcode, alternate code, or description, this option allows you to search on what information you do have.

Account

1st Level  Exact match

2nd Level  Exact match

3rd Level  Exact match

Container

Barcode  Exact match

Alternate Code  Exact match

Short Description  Exact match

Description  Exact match

Contents  Exact match

Contents Date  In Range

Contents Range Text  In Range

Custom Field 1  Exact match

Custom Field 2  Exact match

Custom Field 3  Exact match

Custom Field 4  Exact match

Custom Date  Exact match

Destroy Date  Exact match

Filefolder ☒ Tape ☐

Barcode  Exact match

Alternate Code  Exact match

Short Description  Exact match

Description  Exact match

Contents  Exact match

Contents Date  In Range

Contents Range Text  In Range

Custom Field 1  Exact match

Custom Field 2  Exact match

Custom Field 3  Exact match

Custom Field 4  Exact match

Custom Date  Exact match

Destroy Date  Exact match

[Search](#) [Back to Order Express](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 54:14 minutes

You can enter information for Account, Container, Filefolder, and Tape. However, you must use the radio buttons to select either Filefolder or Tape information; you cannot search for both at the same time.

Enter the information you have in the appropriate field. For each field you can select whether the text entered needs to match exactly, or if you want anything that begins with or contains the text entered. To enter more than one item in a field, click the **Multiple** button. The Multiple Data Entry screen appears.

Enter the items you want (there is a limit of 50). Tab to move between fields. When you have finished, click **Back to Search** to return to the previous screen.

The items have been added to the field followed by an ellipsis (...) to indicate the field contains multiple items. The field is grayed out. If you want to add or edit entries, you need to click the **Multiple** button again.

When querying by account level 1, 2, and 3, the logical operator AND is used. If you are querying by multiples, the operator OR is used to join the multiples within the same level, and the operator AND is used across levels. For example, querying by level 1 account 1000 and multiple level 2 accounts 200, 300, 400 would create the following query:

Item^Level1AccountCode = "1000" AND ( Item^Level2AccountCode = "200" OR Item^Level2AccountCode = "300" OR Item^Level2AccountCode = "400" ).

All search criteria except account uses the logical operator OR for searching. For example, if a container barcode 001001 and a filefolder alternate code ALT113 are entered in the search criteria, the search will look for container with barcode 001001 or filefolder with alternate code ALT113. The following query is created:

Container^Barcode = "001001" OR Filefolder^AltCode = "ALT113"

When account and other search criteria are used together, the search will match the other search criteria that belongs to the specified accounts. For example, if a container barcode 001001, a filefolder alternate code ALT113, and level 1 account 1000 are entered. The search will look for the container with barcode 001001 or the filefolder with the alternate code ALT113 that are under the level 1 account 1000. The following query is created:

Item^Level1AccountCode = "1000" AND (Container^Barcode = "001001" OR Filefolder^AltCode = "ALT113")

When you have completed the fields you want, click **Search** to begin the search.

**O'Neil University**  
Search Results

Welcome Carol  
[Cart \(97 items\)](#) [Logout](#)

3 items found (shown in bold)

<input type="checkbox"/>	Object Code	Barcode	Alternate Code	Short Description	Contents Rang.	Contents Rang.	Contents Start	Contents End D.	Status
<input type="checkbox"/>	ARCHIVE	134500	XYZ	ABBOTT	CONSUELO		10/1/1996	10/30/1996	In
<input type="checkbox"/>	ARCHIVE	134501	XYZ				10/1/1996	10/30/1996	In
<input type="checkbox"/>	ARCHIVE	134502	PPP	FEENEY	HUTTER		10/1/1996	10/30/1996	In

Item Info (double click HERE to view/hide)

Page 1 of 1

Add item that is not currently registered? [Container](#) [Filefolder](#) [Tape](#)

[Order Now](#) [Add to Cart](#) [View Detail](#) [Back to Search](#) [Back to Order Express](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 56:14 minutes.

When you search for containers and filefolders at the same time, if the filefolder happens to be inside a container that also matches your search criteria, the filefolder will be displayed in the first level of the grid, and will also be displayed when you expand the container it belongs to.

The Search Results grid returns a maximum of 500 items that match your criteria. If the number of results exceeds 500, the message “Not all results are displayed as the number of results exceeds the specified maximum” is displayed. The number of items found displays at the top of the screen. Each page contains 50 rows of data. If there is more than one page of results, navigation arrows appear at the bottom left of the screen. Click the arrows to move between screens.

**NOTE:** Unlike the other screens in RSWeb, the Order Express Search Result screen displays only the current page number without the total number of pages.

The following keyboard shortcuts are available for navigating through the Search Results screen:

Key	Action
Home	Moves to the first row of the grid displayed
End	Moves to the last row of the grid displayed
Up Arrow	Moves you up one row at a time on the same level
Down Arrow	Moves you down one row at a time on the same level
Shift + Tab	Moves you up one row at a time through different levels if they are expanded
Tab	Moves you down one row at a time through different levels if they are expanded
+	Expands a row
-	Collapses a row
Space Bar	Toggles between selecting and unselecting a row

### Add Unregistered Items

When search results are displayed but the item you are looking for is not listed, you have the option of adding the unregistered item from the Order Express Search Results grid.



**O'Neil University**  
Search Results

Welcome Carol  
[Cart \(97 items\)](#) [Logout](#)

3 items found (shown in bold)

<input type="checkbox"/>	Object Code	Barcode	Alternate Code	Short Descripti.	Contents Rang.	Contents Rang.	Contents Start.	Contents End D.	Statu
<input type="checkbox"/>	ARCHIVE	134500	XYZ		ABBOTT	CONSUELO	10/1/1996	10/30/1996	In
<input type="checkbox"/>	ARCHIVE	134501	XYZ				10/1/1996	10/30/1996	In
<input type="checkbox"/>	ARCHIVE	134502	PPP		FEENEY	HUTTER	10/1/1996	10/30/1996	In

Page 1 of 1

Item Info (double click HERE to view/hide)

Add item that is not currently registered? [Container](#) [Filefolder](#) [Tape](#)

[Order Now](#) [Add to Cart](#) [View Detail](#) [Back to Search](#) [Back to Order Express](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 56:14 minutes.

In the lower right corner, the message "Add item that is not currently registered?" appears. Next to the message are links to Container, Filefolder, and Tape.

If no results were returned using Order Express Search, the following page displays with the same links available.

**O'Neil University**  
Search Result

Welcome CAROL  
[Logout](#)

No items found

Add item that is not currently registered? [Container](#) [Filefolder](#) [Tape](#)

[Back to Search](#) [Back to Order Express](#)

RSWeb.NET 3.05.14 Copyright © 2008 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Click on a link and you are taken to the Quick Add form (if your record center has created one). If a Quick Add form does not exist, you are taken to the Item Description page where you can add the item.

### View Detail

Click the **View Detail** button to view details for any item.

Item Detail - Microsoft Internet Explorer

Print Page Close

### Item 134529 Detail

Object Code: ARCHIVE	Barcode: 134529
Alternate Code: 169	Account Code: 1000
Short Desc:	Item Status: Out
Contents Range Start:	Contents Range End:
Contents Start Date: 9/1/2000	Contents End Date: 9/30/2000
Status Date: 9/30/2000 10:11:45 AM	Add Date: 4/23/2000 12:00:00 AM
Access Count: 1	Perm Flag: No
Destroy Date: 12/31/2004	Custom Date:
Custom Field 1:	
Custom Field 2:	
Custom Field 3:	
Custom Field 4:	

Description

Cancelled checks for 2000  
Branch 532

Contents

You can also view item information by double clicking on the line "Item Info (double click here to view/hide)" near the bottom of the screen, or clicking the small down-arrow at the end of that line. This opens an item information panel at the bottom of the grid. As you select an item, its information is displayed in the panel.

**NOTE:** There may be a slight delay when you click on an item in the grid when the Item Information panel is open since the page is retrieving the information of the active row in real time.

**O'Neil University** Search Result Welcome CAROL [Logout](#)

136 items found (shown in bold)

<input type="checkbox"/>	Object Code	Barcode	Alternate Code	Short Description	Contents Rang...	Contents Start ...	Contents End ...	Status	Status Date
<input type="checkbox"/>	ARCHIVE	134516	142			8/1/1999	8/31/1999	In	8/21/2006
<input type="checkbox"/>	ARCHIVE	134517	143			9/1/1999	9/30/1999	Out	8/21/2006
<input type="checkbox"/>	ARCHIVE	134518	144			10/1/1999	10/31/1999	Out	8/21/2006
<input type="checkbox"/>	ARCHIVE	134519	170			10/1/2000	10/31/2000	Out	8/21/2006
<input type="checkbox"/>	ARCHIVE	134520	160			12/1/1999	12/31/1999	In	8/21/2006
<input type="checkbox"/>	ARCHIVE	134521	161			1/1/2000	1/31/2000	In	8/21/2006
<input type="checkbox"/>	ARCHIVE	134522	163			3/1/2000	3/31/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134523	162			2/1/2000	2/29/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134524	164			4/1/2000	4/30/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134525	165			5/1/2000	5/31/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134526	166			6/1/2000	6/30/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134527	167			7/1/2000	7/31/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134528	168			8/1/2000	8/31/2000	Out	6/19/2006
<input type="checkbox"/>	ARCHIVE	134529	169			9/1/2000	9/30/2000	Out	10/19/2006
<input type="checkbox"/>	ARCHIVE	134601	AU-201		134590 150000	4/21/1998	4/21/2002	In	6/19/2006

**Item Info (double click to view/hide)**

Object Code: ARCHIVE    Barcode: 134529    Alternate Code: 169  
 Account Code: 1000    Contents Range Start:    Contents Range End:    Short Desc:    Contents Start Date: 9/1/2000    Contents End Date: 9/30/2000  
 Item Status: Out    Access Count: 6    Perm Flag: No    Destroy Date: 12/31/2004  
 Status Date: 10/19/2006 9:33:02 AM    Add Date: 4/23/2000 12:00:00 AM

Page 1    Selected: 0

Add item that is not currently registered? [Container](#) [Filefolder](#) [Tape](#)

[Order Now](#) [Add To Cart](#) [View Detail](#) [Back to Search](#) [Back to Order Express](#)

RSWeb.NET 3.05.14 Copyright © 2008 O'Neil Software, Inc. All rights reserved.    Session will timeout in approximately 58:44 minutes.

To close the panel, double click on the Item Info bar again, or click the small up-arrow.

To indicate the items you want to order, select the check box to the left of the row. To select all items in the grid, click the check mark at the top of the column. You can also select items by clicking and dragging in the check box column. The bottom right of the screen displays the number of items selected.

From here you have two options. You can order the items now, or you can add them to the cart.

## Order Now

When you click the **Order Now** button, you receive the following prompt.

**Windows Internet Explorer**

?

You are about to order 2 items. Continue?

[OK](#) [Cancel](#)

Click **OK** to continue. The Order Items screen appears.

**O'Neil University** Order Welcome Carol [Cart \(97 items\)](#) [Logout](#)

Service Type  
 Deliver (Bring the item to me.)

Requestor  Cost Center

Comments

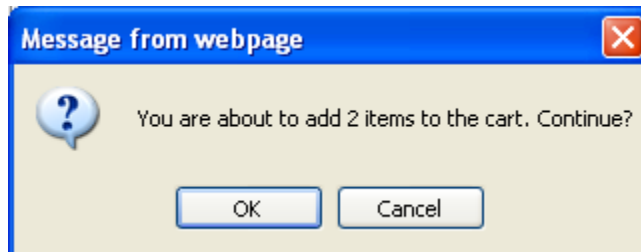
[Continue](#) [Back to Results](#)


RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.    Session will timeout in approximately 58:59 minutes.

Complete the fields and click **Continue**. The Order Now grid appears.

O'Neil		O'Neil University				Welcome Carol		
		Order Now				Cart (99 items) Logout		
✓	Track#	Service Type	Details	Quantity	Requestor	Cost Center	Customer Comment	Placed In Cart...
	589	Delivery	Container 961123	1	Cathie	66		9/7/72
	590	Delivery	Container 134500 [XYZ]	1	Cathie	66		9/7/72
	595	Imaging	Container - blue container	1				9/15/72
	596	Imaging	Container - green contain...	1				9/15/72
	598	Imaging	Container - Container wit...	1	Cathie	66		9/16/72
	602	Imaging	DOC000700000000	1	John Smith	66		12/7/72
	603	Imaging	DOC000800000000	1	John Smith	66		12/7/72
	604	Delivery	Container 134500 [XYZ]	1	Joe Manning	66	Please deliver to loadin...	12/9/72
	605	Delivery	Container 134501 [XYX]	1	Joe Manning	66	Please deliver to loadin...	12/9/72
	622	Delivery	Container 134511 [137]	1	Joe Gaven		Deliver to 2nd floor.	12/9/72
	623	Delivery	Container 134512 [138]	1	Joe Gaven		Deliver to 2nd floor.	12/9/72
	624	Delivery	Container 134513 [139]	1	Joe Gaven		Deliver to 2nd floor.	12/9/72
	625	Delivery	Container 134610 [AU-21...	1	Joe Gaven		Deliver to 2nd floor.	12/9/72
	626	Report Create	Containers to Destroy Rpt	1				12/10/72
	640	Delivery	Container 134504 [TTT]	1	Roberta			12/14/72
	641	Delivery	Container 134500 [XYZ]	1	Brady	600		12/15/72
	642	Delivery	Container 134501 [XYX]	1	Brady	600		12/15/72

**Add to Cart**





*O'Neil University*

Add to Cart

Welcome Carol

[Cart \(99 items\)](#) [Logout](#)

Service Type

Deliver (Bring the item to me.)

Requestor

Brady

Cost Center

600

Comments

[Add to Cart](#) [Back to Results](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved.

Session will timeout in approximately 60:00 minutes

**O'Neil University**  
Add to Cart Summary

Welcome Carol  
[Cart \(101 items\)](#) [Logout](#)

[Print](#) [View Cart](#) [Order Now](#) [Back to Results](#) [Back to Order Express](#)

Font Size [8pt](#)

### Add to Cart Summary

Service Type: Deliver (Bring the item to me.)  
Requestor: Brady  
Cost Center: 600

Barcode	Type	Alternate Code	Account	Status
134500	Container	XYZ	1000	Added to cart successfully
134501	Container	XYX	1000	Added to cart successfully

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

You can choose to place your order now or view the cart.

## No Item Found

If the item you are searching for does not exist in the system, the following screen displays.

**O'Neil University**  
Search Results

Welcome Carol  
[Cart \(101 items\)](#) [Logout](#)

No items found

Add item that is not currently registered? [Container](#) [Filefolder](#) [Tape](#)

[Back to Search](#) [Back to Order Express](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

To add an item that is not currently registered in the system, click one of the links. You are taken to either a quick add form or an item description screen, which are both described in the following section.

## The Item I Want is Not Currently Registered

There are two ways you can order an item that is not currently registered in the system. One way is to use a quick add form, and the other is to describe the item.

### Quick Add Form

Quick add forms are used to add a temporary filefolder. They cannot be used for containers or tapes. There is a field in the Default Form Configuration screen under the **My Preferences** menu to select a default Quick Add form for Filefolders.

If a Quick Add form is assigned, when you click on the Filefolder link, an Order Express Quick Add screen similar to the following appears (you will see the form that your record center has set up for you).

Enter your data in the fields and click **Add**. A message indicates that the item was successfully added.

You can continue adding as many items as you want. When you have finished, click **Continue**. The **Add to Cart** dialog appears.

**NOTE:** The values entered in the Quick Add data entry fields are ignored when the **Continue** button is clicked. Items need to be added using the **Add** button first before clicking **Continue**.

**O'Neil University**  
Add to Cart

Welcome Carol  
[Cart \(101 items\)](#) [Logout](#)

Service Type  
Deliver (Bring the item to me.)

Requestor  
Cost Center

Comments

[Add to Cart](#) [Back to Quick Add](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Complete the fields and click **Add to Cart**.

**O'Neil University**  
Add to Cart Summary

Welcome Carol  
[Cart \(102 items\)](#) [Logout](#)

[Print](#) [View Cart](#) [Order Now](#) [Back to Order Express](#)

Font Size 8pt

**Add to Cart Summary**

Service Type: Deliver (Bring the item to me.)  
Requestor: Jerry Black  
Cost Center: 600

Barcode	Type	Account	Status
6533326	Filefolder	1000	Added to cart successfully

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 60:00 minutes.

Click **View Cart** to go back to the cart, or click **Order Now** to continue placing your order.

### ***Describe the Item***

This option allows you to describe the item by entering as much information as you know about it in a freeform text box. The following screen appears if you select Containers or Tapes. It also appears if no quick add form is assigned for Filefolders.

**NOTE:** Items added using this method can only be added to a web order. They cannot be added to a workorder.

**O'Neil University**  
Add to Cart

Welcome Carol  
[Cart \(102 items\)](#) [Logout](#)

Describe the Container you want to order \*

Service Type  
Deliver (Bring the item to me.)

Requestor  
Jerry Black

Cost Center  
600

Comments

[Add to Cart](#) [Done](#) [Back to Order Express](#)

RSWeb.NET 4.01.203 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:44 minutes.

When you have entered your text, click **Add to Cart**. A message indicates that the item was successfully added to the cart.

You can continue describing as many items as you want. When you have finished, click **Done**.

**NOTE:** The values entered in the data entry fields are ignored when the **Done** button is clicked. Items need to be added using the **Add to Cart** button first before clicking **Done**.

The items are added to the cart.

Click **View Cart** to go back to the cart, or click **Order Now** to continue placing your order.

### Order Now

When you click **Order Now**, the items that were added through the **Add to Cart** button, plus the current described item (if any) are added to the bottom of the Order Express Review grid.





## *I know exactly what I want imaged*

Selecting the **Containers** or **Filefolders** link takes you to the Items Entry screen.

The screenshot shows the 'Items Entry' screen for O'Neil University. The header includes the O'Neil logo, the text 'O'Neil University Items Entry', and a welcome message 'Welcome Carol' with links for 'Cart (84 items)' and 'Logout'. The main form area has two dropdown menus: 'Item Type' set to 'Container' and 'Entry Type' set to 'Barcode'. Below these is a table with 7 rows, each with a 'Barcode' input field. A checkbox labeled 'Continue without resolving invalid/multiple match items' is at the bottom left. At the bottom right are three buttons: 'Next', 'Clear Items', and 'Back to Image Express'. The footer contains the text 'RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 59:30 minutes.'

Since you have already selected whether the item is a container or filefolder, that field is grayed out. You can enter Barcode, Alt Code, or Short Description information. When you have entered everything you want, click **Next**. The **Add to Cart** dialog appears (see *Add to Cart* section below).

Selecting the **Documents** link takes you to the **Add to Cart** screen.

The screenshot shows the 'Add to Cart' screen for O'Neil University. The header includes the O'Neil logo, the text 'O'Neil University Add to Cart', and a welcome message 'Welcome Carol' with links for 'Cart (88 items)' and 'Logout'. The main form area has several sections: 'Document Code \*' with an 'Add Document' button; 'Service Type' set to 'Imaging (Image the item.)'; 'Requestor' and 'Cost Center' input fields; 'Comments' input field; 'Image Info' section with 'Reference' and 'Description' input fields; a grid of 'Index Field' inputs (1-8); 'Index Field Date 1' and 'Index Field Date 2' dropdown menus; and 'Imaging Instructions \*' input field. At the bottom right are three buttons: 'Add to Cart', 'Done', and 'Back to Image Express'. The footer contains the text 'RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved.' and 'Session will timeout in approximately 59:30 minutes.'

Complete the fields as usual. Click **Add to Cart** to add the item to the cart. All fields except Requestor and Cost Center are cleared and you can add another item. When you have finished adding items to the cart, click **Done**. The **Add to Cart Summary** displays.

**O'Neil University** Welcome Carol  
Add to Cart Summary [Cart \(89 items\)](#) [Logout](#)

Print View Cart Order Now Back to Image Express

Font Size 8pt

### Add to Cart Summary

Service Type: Imaging (Image the item.)

Code	Type	Requestor	Cost Center	Reference	Imaging Instructions	Status
1111223	Document	Cathie	66	Itineraries	Please scan all three pages	Added to cart successfully

RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

## Search for what I want

If you don't know the barcode, alternate code, or description of the item you want imaged, this option allows you to search on what information you do have. Select the check box next to the type of item you want to search for. You can search for more than one type at a time.

**O'Neil University** Welcome Carol  
Search for What I Want [Cart \(84 items\)](#) [Logout](#)

Search:

- ☐ Account
- ☐ Image
- ☐ Document
- ☐ Filefolder
- ☐ Container

Search Back to Image Express

RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:45 minutes.

The section expands to display Search Criteria fields.

**O'Neil University** Welcome Carol  
Search for What I Want [Cart \(89 items\)](#) [Logout](#)

Search:

- ☐ Account
- ☐ Image
- ☐ Document
- ☐ Filefolder
- ☒ Container

Container Search Criteria

Barcode  Exact match

Search Back to Image Express

RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 59:15 minutes.

Use the drop down arrow in the first field to select what you want to search by. In the next field type the criteria you want to match. In the third field use the drop down arrow to indicate if you want an exact match, or anything that begins with or contains the text entered. To add additional criteria to the search, click the + icon. To remove criteria from the search, click the - icon.

Once you have entered everything you want, click **Search** to display the results.

## Viewing Search Results

All results based on the search criteria entered display in the **Search Results** grid. An item that is not a match will also display if something contained in that item is a match.

The screenshot shows the O'Neil University Search Results page. The header includes the O'Neil logo, the text "O'Neil University Search Results", and a welcome message "Welcome Carol" with links for "Cart (103 items)" and "Logout". Below the header is a navigation bar with tabs: "Full View", "Container Matches", "Filefolder Matches", "Document Matches", and "Image Matches". The main table has columns: "Object Code", "Barcode", "Alternate Code", "Short Description", "Contents Range...", "Contents Range...", "Content...", and "Content...". The table lists several "FILEFOLDER" items with various barcodes. A "Selected: 0" indicator is at the bottom right. At the bottom, there are buttons for "Order Now", "Add to Cart", "Back to Search", and "Back to Image Express". A footer note says "Session will timeout in approximately 57:29 minutes".

The + icon indicates that there are containees in the object.



Click on the icon to expand the view.

- Containers could contain filefolder, documents and/or images.
- Filefolders could contain documents and/or images.
- Documents could contain images.

When an object is expanded, the grid includes additional tabs to filter what is contained in that object if applicable.

The screenshot shows the O'Neil University Search Results page with the "Container Matches" tab expanded. The main table now has a sub-table with columns: "Container Barc...", "Filefolder Barc...", "Document Code", and "Document Description". The sub-table lists documents contained within the selected file folder, including "Invoice # INV001807", "Tour Kg-1", and "Tour Kg-3". The "Selected: 0" indicator is still present. The footer buttons and session timeout notice are also visible.

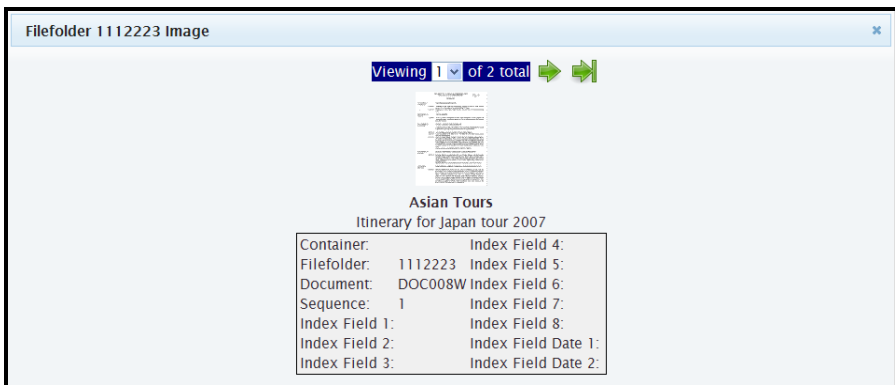
The – icon collapses the containee view.



The **View Images** icon allows you to view existing images for that object. It only appears if images exist.



Click the icon to display the image viewer. You can then navigate through the images.

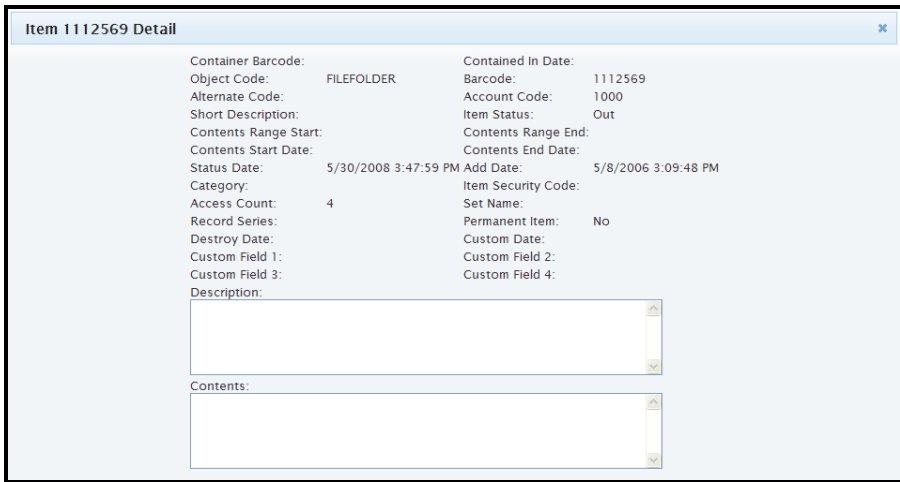


Click the thumbnail to view the full image. To close the image viewer, click the **X** in the top right corner.

To view details of the object, click the **View Detail** icon.

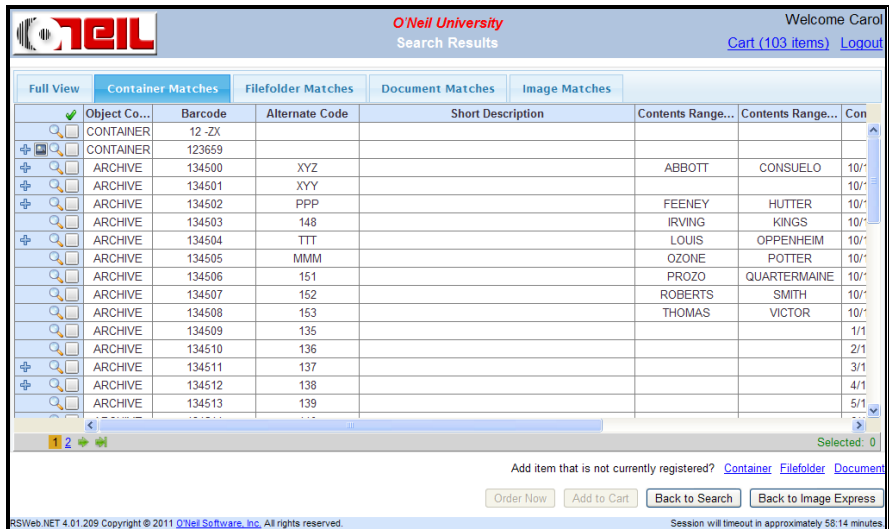


The item detail display.



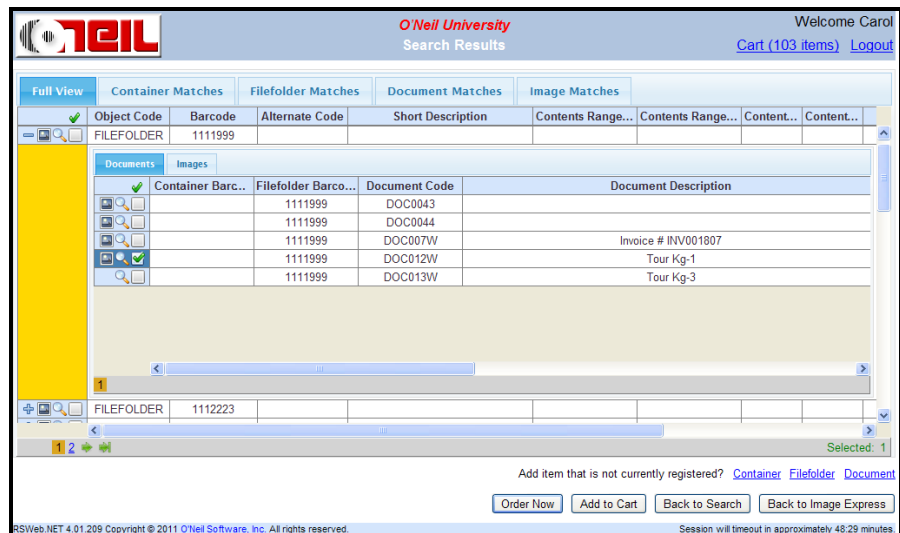
To close the **Detail** dialog, click the **X** in the top right corner.

Tabs along the top of the grid allow you to filter the results. The default is Full View. To filter the results, click one of the other tabs.



## Selecting Items

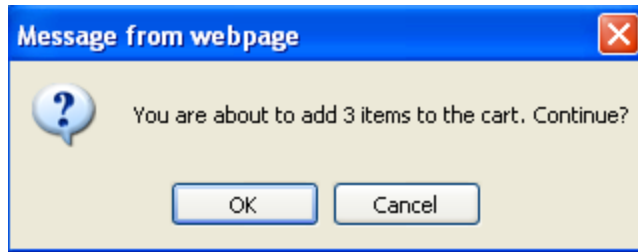
To select an item to add to the cart (or Order Now), select the check box next to the item.



The following applies when selecting items.

- Click the green check mark at the top of the column to select all items in the grid.
- When you select a check box for a container that contains filefolders. All filefolders are included. If you only want to order one of the filefolders in a container, expand the container view first and then select the desired filefolder.

Once items have been selected, click **Add to Cart**.



You receive the standard confirmation that you are about to add items to the cart. Click **OK**. The **Add to Cart** dialog appears (see *Add to Cart* section below).


## Add to Cart

You can access the **Add to Cart** dialog from both of the areas described above.

The first item selected is displayed. The Service Type is set to Imaging and cannot be changed. Complete the fields as necessary.

If you are adding multiple items to the cart at once, and want to have the information entered apply to all the items, select the *Apply to all selected rows* check box. If you do not select the check box, when you click **Add to Cart**, the same screen appears for the next item.

When you have completed all fields, click **Add to Cart**. The **Add to Cart Summary** displays.



**O'Neil University**  
 Add to Cart Summary

Welcome Carol  
[Cart \(85 items\)](#) [Logout](#)

Print

View Cart

Order Now

Back to Image Express

Font Size 8pt

### Add to Cart Summary

Service Type: Imaging (Image the item.)

Code	Type	Account	Requestor	Cost Center	Reference	Imaging Instructions	Status
123659	Container	1000	Cathie	86	Itineraries	Please scan all documents in container	Added to cart successfully

RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved.
 Session will timeout in approximately 59:14 minutes

---

**NOTE:** Since there are so many entry fields for imaging requests, any fields that are blank for all requested items will not display in the summary.

---

### ***The item I want is not currently registered***


This option allows you to describe the item you want imaged by entering as much information as you know about it in a freeform text box.

---

**NOTE:** The **Container** and **Document** links will always take you to the **Add to Cart** screen. If a Quick Add form has been assigned for filefolders, you will see that rather than the **Add to Cart** screen when you select the **Filefolder** link.

---





**O'Neil University**  
Add to Cart

Welcome Carol  
[Cart \(85 items\)](#) [Logout](#)

Describe the Container you want to order \*

Service Type  
Imaging (Image the item.)

Requestor  
Cathie

Cost Center  
66

Comments

Image Info

Reference

Description

Index Field 1

Index Field 2

Index Field 3

Index Field 4

Index Field 5

Index Field 6

Index Field 7

Index Field 8

Index Field Date 1


Index Field Date 2

Imaging Instructions \*

Add to Cart Done Back to Image Express

RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 58:00 minutes

Describe the item you want imaged and complete any of the other fields. When you have finished, click **Add to Cart**. The item is added to the cart and all fields except Requestor and Cost Center are cleared. Continue adding any additional items you want, and when you have finished, click **Done**. The **Add to Cart Summary** appears



**O'Neil University**  
Add to Cart Summary

Welcome Carol  
[Cart \(90 items\)](#) [Logout](#)

Print View Cart Order Now Back to Image Express

Font Size 8pt

### Add to Cart Summary

Type: Container

Service Type	Description	Requestor	Cost Center	Index Field 1	Index Field 2	Imaging Instructions	Status
imaging (Image the item)	Container with green label reading "European itineraries"	Cathie	66	1	2	Please scan all itineraries in container	Added to cart successfully

RSWeb.NET 4.00.274 Copyright © 2010 O'Neil Software, Inc. All rights reserved. Session will timeout in approximately 58:30 minutes



# Index

## A

- Account Access 15
- Add
  - Containers 31
  - Filefolders 36
  - Tapes 39
- Add to Cart
  - Inventory 20
- Add User 7
- Advanced Search 29

## B

- Bulk Items 63

## C

- Cart 55
  - Add Bulk Items 63
  - Add Items 56
  - Add Materials 64
  - Add Reports 65
  - Add Services 64
  - Edit 70
  - Remove Items 78
  - View Details 71
- Change Password 6
- Choose Column Format 25
- Clear All 26
- Clear Selected 26
- Column Format 25
- Containers 30
  - Add 31
  - Edit 32
  - Global Edit 33
  - Search 32
- Create
  - Order 71
  - Workorder 71

## D

- Data Entry Form Preferences 5
- Default Forms
  - Preferences 5
- Document 41
- Documents
  - Add New 41
  - Edit 43
  - Global Edit 43

## E

- Edit
  - Cart 70
  - Containers 32
  - Filefolders 36
  - Tapes 39
- Enter Items 57
- Export Grids 24

## F

- Filefolders 35
  - Add 36
  - Edit 36
  - Global Edit 37
  - Search 36
- Find 26
- Find Next 26
- Format Columns 25
- Function Access 14
  - Reports 16

## G

- Getting Started
  - Inventory 19
  - Order 55
- Global Edit
  - Containers 33
  - Filefolders 37
  - Tapes 40
- Grid
  - Export 24

## I

- Image 46, 49
  - View 46, 51
- Image Express 99
- Intro 5
- Inventory 19
  - Add to Cart 20
  - Containers 30
  - Document 41

- Filefolders 35
- Getting Started 19
- Tapes 38
- Invert Selection 26
- Item Entry Verification 59
- Items 57
  - Add to Cart 57

## **L**

- Load From File 61
- Load From List 30
- Logging In 1

## **M**

- Manually Change Password 6
- Materials
  - Add to Cart 64
- Model User 12
- My Preferences 5

## **O**

- Order 55
  - Create 71
  - Getting Started 55
- Order Express 85
- Order Status 79

## **P**

- Password
  - Change 6
- Print 23

## **Q**

- Quick Search 28

## **R**

- Remember Me 2
- Remove All Rows 78
- Remove Current Row 78
- Remove From Cart 78
- Remove Selected Row 78
- Reports
  - Add to Cart 65
  - Retrieve 83
- Retention Information 33
- Retrieve Web Report 83

## **S**

- Save to List 28

## **Search**

- Batch Number Range 80
- Containers 32
- Date Range 81
- Filefolders 36
- Status 81
- Tapes 39
- Tracking Number Range 80
- Workorder Number Range 81
- Search & Select 60
- Search Criteria
  - Combining 82
- Search Results 82
- Select All 26
- Services
  - Add to Cart 64
- Sort 27

## **T**

- Tapes
  - Add 39
  - Edit 39
  - Global Edit 40
  - Search 39
- Terms and Conditions 2
- Time Out 3

## **U**

- Unselect All 26
- User
  - Account Access 15
  - Add 7
  - Delete 12
  - Edit 10
  - Function Access 14
- User Admin 6

## **V**

- View
  - Digitech Image 53
  - GIF 48, 52
  - PDF 47, 52
  - TIFF 48, 52
- View Contents 21
- View Description 21
- View Details
  - Cart 71
- View Image 46, 51
- View Keywords 23

## **W**

- Web Report

Retrieve 83  
Workorder  
Create 71