

CAUGHEY & DIGNON LIMITED



CDL

RECORDS MANAGEMENT

Archive Storage

ONLINE PORTAL GUIDE

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This manual is designed to help you understand our online portal functions and features.



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Accessing the Portal

1. Open Internet Explorer 7 or higher.
2. Go to: www.cdlrecordsmanagement.co.nz.
3. Click on **Login** on the top right corner.
4. Enter your username (attached to this guide) on the **Username** field.
5. Enter your password (attached to this guide) in the **Password** field.
6. Click on **Login**.

The **Remember Me** option allows the username to be remembered the next time you return to the login page.



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Homepage Overview

Home

From the Home Menu you can read an introduction to your Portal, determine your default forms for data entry through **My Preferences** and change your password.

Inventory

Through this menu you can access exiting stored items and update information associated with them. You can also add new items to the database.

Order

Through this menu you will be able to request any service required from us (schedule pick-ups of new items, order supplies, order reports, order materials or other services).

The status of all existing order can also be checked.



Inventory Menu

Performing a Quick Search

This option provides a quick method of searching for data by using saved queries that have been created by us.

1. From the **Inventory** and **Container** grid, select the **Search** menu and **Quick Search**. +
2. Select a query from the list provided. The **Description Box** provides further information about the query.
3. Enter the relevant information.
4. Click **Search** to display the result of the query.

Performing an Advanced Search

Using **Advanced Search** you can create your own search criteria to include multiple fields or items, view the results of your search and determine which items to add to cart.

1. From the **Inventory** and **Container** grid select the **Search** menu and **Advanced Search**.
2. Enter the criteria for the search by selecting the Field and the Operator.
3. Use the **Add** button to search for multiple items within a field, such as barcode or alternate code and the **Remove** button to remove any items.
4. To search by the description or contents field:
 - i. Select the operator
 - Is Equal To** – will match the selected field exactly.
 - Contains** – exists anywhere in the selected field.
 - Begins With** – begins with the entered value.
 - ii. Enter the value and click on **Add More** to add another criteria, repeat the steps until all values have been entered.
5. To delete a field criteria from your search, select the criteria you would like to remove and click the **Delete** button.
6. Click the **Search** button to run the query.

Results Menu

Select All

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

Unselect All

This option options used to unselect all items on a grid. When an item is unselected, its row appears with a white or gray background.

Invert Selection

This option is used to allow all selected items to become unselected, and all unselected items to become selected.

Clear All

This option clears all items from the grid, but does not delete the items from the database.

Clear Selected

This option clears only selected items from the grid, but does not delete the items from the database.

Find / Find Next

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

The 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. To change to a different sort order, click the drop down arrow. A description of the sort order displays in the **Description** field.



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Save to List

This option is used to save a list of items that have been loaded and are selected on a grid. Unselected items will not be saved. You can use **Load from List** menu option to quickly load that same list of items when they are required.

Editing Items

To edit data for any item, it needs to be queried and selected in the grid.

1. From the **Inventory** and **Container** grid, search for the item to be edited.
2. Click on the **Options** menu and select **Edit**. The default edit form for containers will be displayed.
3. Edit the fields you would like to modify, and click **Submit** to update the database.

Global Editing Items

Global editing is used when you want to edit several items at once.

1. From the **Inventory** and **Container** grid, search for the item(s) to be edited.
2. Click on the **Options** menu and select **Global Edit**. The default global edit form for containers will be displayed.
3. Edit the fields you would like to modify, and click **Submit** to update the database.

Please note that the **Reset Form** button clears out any data that was entered by the user but leaves data already submitted in the database. The **Back to Results** button will return you to the grid without saving any change.

View Description

This option allows you to view multiple lines of the items description on one continuous page, whereas only up to the first 5 lines of the description can be viewed in the Inventory grid.

1. From the **Inventory** grid, select the item you want to view the description for.
2. Select the **Options** menu, and then select **View Description**.

The description view supports the following URLs and converts them into hyperlinks:

- http
- www
- mailto:

View Contents

This option allows you to view multiple lines of the item's contents on one continuous page, whereas only up to the first 5 lines of the contents can be viewed in the Inventory Grid.

The contents view supports the following URLs and converts them into hyperlinks:

- http
- www
- mailto:

Adding New Items

New containers can be added with CDL Records Management Online Portal. Once the information is entered and submitted, it is added to the database at the record centre with a status **of pending**. Once it has been picked up by the driver and scanned into the record centre, the item status will change from **pending** to **in**.

1. From the **Inventory** and **Container** grid, select the **Options** menu and then select **Add**.
2. The default **Container Add** form will be displayed.
3. Enter information into the relevant fields and click **Submit** to add the container to the database. **Back to Results** returns the user to the **Container** grid.

Exporting Data

All grids have an export feature which allows data to be exported into a file that can be opened and viewed in Microsoft Excel or a Text File format.

1. From the **Inventory** and **Container** grid, query the data to be exported and select the **Options** menu and then select **Export**.
2. Select the delimiter, which is what separates the columns during the export process (Usually is “;”)
3. If the **Quotes around fields** option is selected, each field will be surrounded by quotation marks. If you do not want to include the quotes, clear the check box.
4. Click the **Download** button.
5. Click **Back to Results** to return to the **Container** grid.

Changing Column Formats

This option displays which columns appear on a grid. There are 5 default column formats that are programmed into the software.

1. From the **Inventory** menu and **Container** grid, click **Options** and select **Choose Column Format**.
2. Select a format for the columns to display from the drop down list, and click **Submit** to return to the **Container** grid.



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Order Menu

Items

Enter Items

This option is used when you know the barcode, alternate code or short description of a container, file folder or tape. The items are entered individually and then added to the cart.

1. From the **Order** and **Cart** grid, click the **Add to Cart** menu.
2. Select **Items** and **Enter Items**.
3. Select the **Item Type** (Container, file folder or tape).
4. Select the **Entry Type** for the item (Barcode, alternative code or short description).
5. Enter the information and click **Next**.

Note that the symbol “%” can be used at the end of them item’s short description if only the beginning of the description is known.

6. On the next screen, select the **Service Type**.
7. Enter information into the **Requestor**, **Cost Center** and/or **Comments** field.
8. Click on **Add to Cart**.

Search and Select

Use this option when you want to order a large group of items which are to be added to cart.

1. From the **Order** and **Cart** grid, click the **Add to Cart** menu.
2. Select **Items** and then select **Search & Select**.
3. Click on the **Item Type (Containers, file folders or tapes)** and select a query from the quick search list. The results will display in the **Container** grid.
4. Select **Options** and then select **Add to Cart** so then you can enter the **Service Type** and **Requestor**.
5. Select **Add to Cart**.

Loading Items from a File

Items can be added to the cart by loading a list from an external text file. The file can hold a list of barcodes or a list of alternate codes.

1. From the **Order** and **Cart** grid, click the **Add to Cart** menu.
2. Select **Items** and **Load from File**.
 - a. Select the **Item Type (Container, file folder or tape)**.
 - b. Type the name and path of your file or click **Browse** to locate the file.
 - c. **Separator** is what separates the fields of data in your file and can be either a comma, semi-colon, pipe, tab or carriage return.
 - d. **Type of Criteria** defines the information that you are uploading and can be one of the following: Barcodes or alternative codes.
3. Select **Upload**.
4. Click **Next** to add the items to the cart.
5. Enter **Service Type, Requestor, Cost Center** and/or **Comments**.
6. Click **Add to Cart**.

Bulk Items

1. From the **Order** and **Cart** grid, click the **Add to Cart** menu and select **Bulk Items**.
2. Select the **Service Type** to indicate if it is a **Pickup** (We will pick the items from your premises) or **Receive** (You will deliver the items to our record centre).
3. Enter the quantity of containers, file folder or tapes and any comments (if required).
4. Click on **Add to Cart**.

Materials

From this option, you will be able to order our boxes.

1. From the **Order** and **Cart** grid, click the **Add to Cart** menu and select **Materials**.
2. Select the **Material** to be ordered (Boxes) and enter the quantity requested. Enter any additional comments for the record centre (If required).
3. Click on **Add to Cart**.

Completing an Order

After you added everything needed to your cart, you need to check-out the order.



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1. From the **Order** and **Cart** grid, select the items to include in the order. Select the **Checkout** menu and click **Order**.
2. Fill in all relevant fields, such as: Contact, address, phone number and etc...
3. Click on **Add Notes** if there is any further information related to the order.
4. Select **Submit Orders**.
5. Done! Your order was submitted.

Order Express Menu

The **Order Express** menu allows you to place an order “quickly” without having to add it to the cart. There are three ways to search for information and use the **Order Now** feature.

I Know Exactly What I Want by Barcode, Alternative Code or Description

1. On the **Order** menu, select **Order Express**.
2. From the “**I know exactly what I want by barcode / alt code / description**” section, select containers, file folders or tapes link.
3. The **Item Type** field will be grayed out as the item has already been selected from the main **Order Express** screen. Select the **Entry Type** and enter the item(s) to be ordered. Click **Next**.
4. Click **Add to Cart** and select **Order Now**. The item(s) will be added to the **Order Express Review** grid. Click **Order** or **Workorder** to submit the item(s) to the record centre.

Search for What I Want

This option allows you to search for items based on what information you have about your account, container, file folder or tape.

1. On the **Order** menu, select **Order Express**.
2. From the “**Search for What I Want**” section, click on **Search**.
3. Fill in the applicable fields, remembering to choose the appropriate operator (Exact match, begins with or contains).

Please note that you do not need to fill in all fields to complete your search.

4. Click on **Search**.
5. The queried items will then be displayed.
6. Select (by checking the box on the left) all required items.
7. To add to the cart, press **Add to Cart** at the bottom right. Or, to order straight away, click on **Order Now** at the bottom right.
8. Choose the **Service Type** (Access, deliver or pick up).
9. Fill in **Requestor**, **Cost Center** and **Comments** if applicable.
10. Click on **Continue**.

The Item I Want is Not Currently Registered

If a container is not registered in the database, you can add it by describing the item.

Describe the Item

This option is used to describe the container, file folder or tape by entering as much information as you have into a text box.

1. On the **Order** menu, select **Order Express**.
2. From the “**The item I want is not currently registered**” section, click on **Container, Filefolder** or **Tape**.
3. Enter the information that is known about the item and complete the **Service Type, Requestor, Cost Center** and **Comments** fields.
4. Click the **Add to Cart** button. This will then allow you to describe another item.
5. Click **Done** to proceed to the **Add to Cart Summary Page**.
6. Click the **Order Now** button to submit the order(s) to the record centre.



Check Status of Orders

You can check the status of any order once it has been checked out.

1. From the **Order** and **Order Status** grid, enter the search criteria and click **Search**.
2. The results will appear in the **Order Status** grid.

Searching by Batch Number Range

When an order is submitted through the portal, it is assigned to a batch, which is identified by a **Batch Number**. Any number of orders can belong to a given batch. Multiple batch numbers can be separated by a comma or a dash.

Please note that if you enter a batch number that does not belong to your account, it will not be included in your results.

Search by Tracking Number Range

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

Searching by Status

The possible status for an order are as follow:

- ❖ **Submitted**
The order has been received by the record centre, but has not yet been reviewed.
- ❖ **Scheduled**
The order has been reviewed by the record centre and is scheduled for fulfilment.
- ❖ **Workorder**
The order has been reviewed by the record centre and has been placed on a workorder for fulfilment, or you placed the order on a workorder and sent it to the record centre for fulfilment.

❖ **Fulfilled**

The order has been fulfilled.

❖ **On Hold**

The order has been placed on-hold because for some reason it could not be fulfilled. We will be contacting you for clarification.

❖ **Cancelled**

The order has been cancelled. Contact us if you have not been informed of the reason for the cancellation.

Searching by Ordered By

If more than one user have access to the same account, each user will be able to search and view the **Order Status** grid for items that have been ordered by another user.

Viewing Information in the Order Status Grid

This will allow you to view the **Order Detail** screen and will display information such as the status, status date and workorder number. This screen can also be printed.

1. From the **Order Status** grid, select the order you would like to view.
2. Click the **Options** menu, and select **View Detail**.
3. Click **Back to Results** to return to the **Order Status** grid.