Total Recall™ SQL

WEB MODULE

Updated June 2013

Records Center Training Guide

Florida State Records Center
Division of Library and Information Services

FLORIDA DEPARTMENT of STATE

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Table of Contents

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INTRODUCTION

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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CHAPTER 1 – User Access to Total Recall

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

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

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

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

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

NOTE*:* It is important for each user to have a unique User ID and password, as the system tracks actions by the user who is logged into the system.

Unauthorized users receive the following message: "**User ID or Password Invalid!**"
Once the user successfully logs in, the user will see the Home Page, which is discussed in Chapter 2.

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CHAPTER 2 – Web Module Screen Components

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

Home Page Screen Components

- ***Displays after login.***
- ***Available from <User> drop-down menu.***

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

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

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

Search Screen Components

There are three Search screens:

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

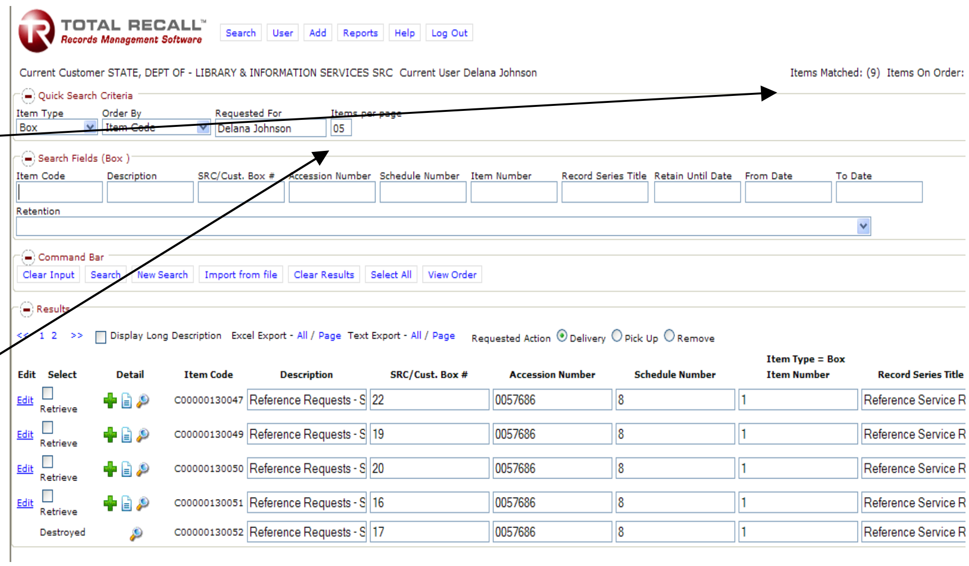
These screens are:

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

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

Items Matched indicates the number of items found in the current search results.
Items On Order indicates number of items on the user's order.

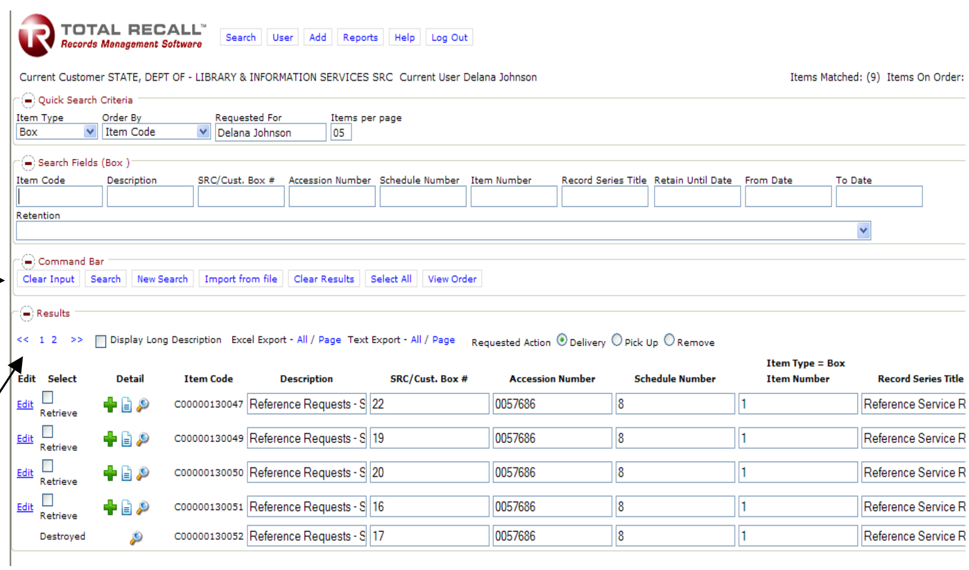
Items Per Page indicates the number of items displayed on a page. The user can change this number by entering a new number and pressing the <Tab> key. The maximum is 1,000 items.



THE COMMAND BAR

<Clear Input> removes the text input from the search fields.
<Search> searches and appends new search results to current items in results grid.
<New Search> searches and clears results grid before displaying new search results.

<Select All> selects items in the search results and adds to order.
<View Order> displays all items on current order.



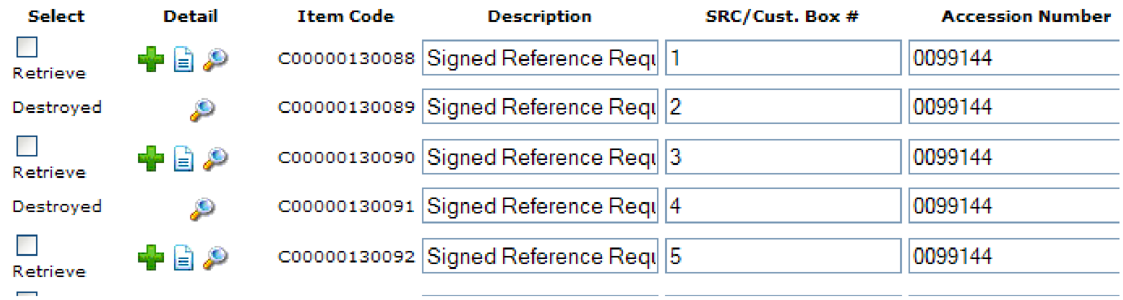
Indicates **number of pages of search results**. User can navigate by clicking on the page numbers and arrows.

Excel Export and Text Export allow user to **export** all search results or just the current page of search results to an Excel spreadsheet or a text file.

Search Results Grid

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

Item Type = Box indicates the items displayed are boxes.

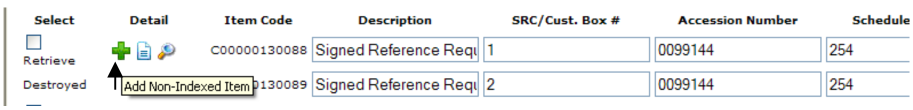


In this example, the selected action is *Retrieve*, so the items available for retrieval have a check box in this column. For the other items, the Select column shows their current status.

Detail Column on the Search Results Grid

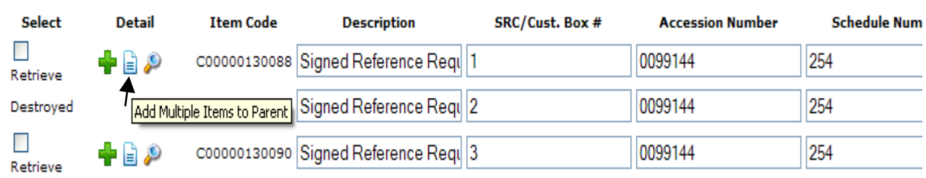
The **Detail column** allows the user to see details about the item displayed.

The first symbol in the **Detail column** is "**Add Non-Indexed Item.**"



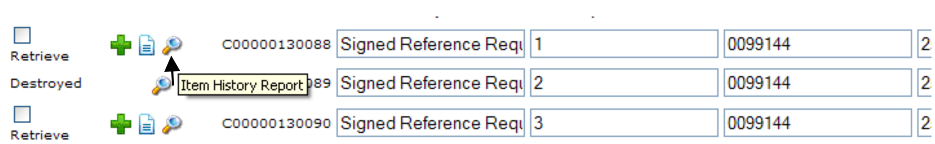
Displays files indexed in the box and allows the user to **retrieve those files or index additional files in the box**.

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



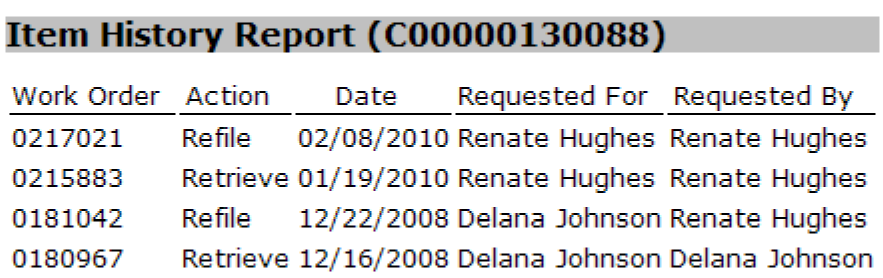
Allows the user to **index multiple files** in the box. Note that this option does NOT display files already indexed in the box.

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



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

Item History Report for item C00000130088. This shows when the item was added, retrieved, and refiled.

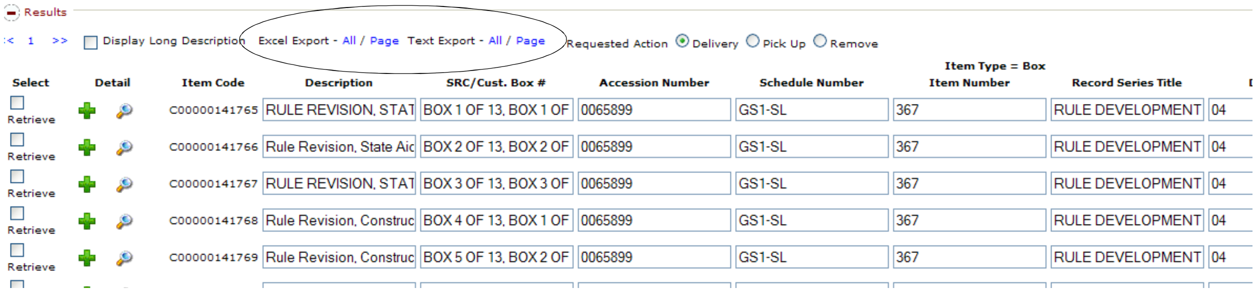


Item History Report (C00000130088)

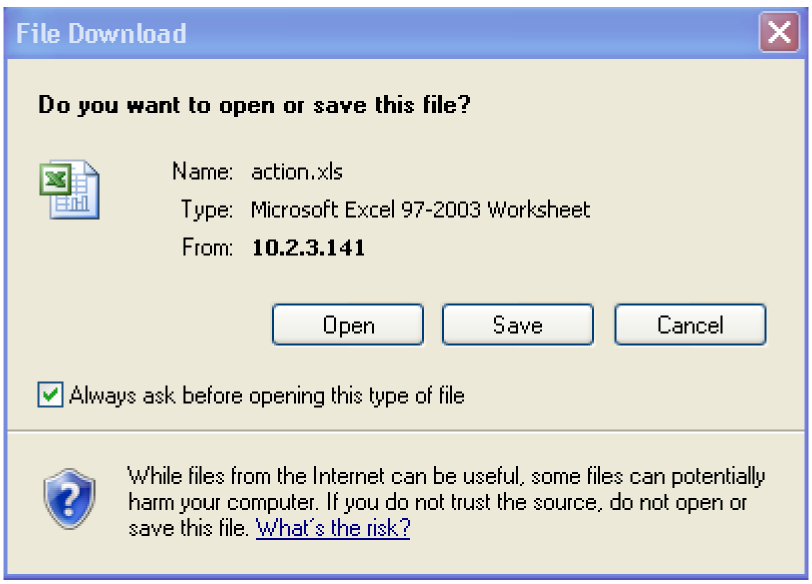
Work Order	Action	Date	Requested For	Requested By
0217021	Refile	02/08/2010	Renate Hughes	Renate Hughes
0215883	Retrieve	01/19/2010	Renate Hughes	Renate Hughes
0181042	Refile	12/22/2008	Delana Johnson	Renate Hughes
0180967	Retrieve	12/16/2008	Delana Johnson	Delana Johnson

Exporting Search Results to an Excel File or a Text File

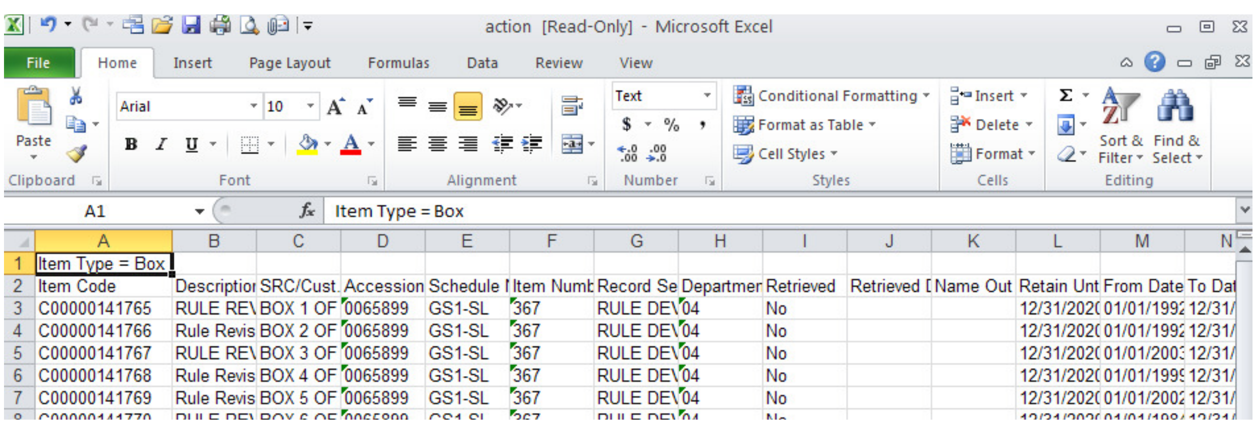
From the Search screens the user has the ability to export the search results to a Microsoft Excel file or a text file. This provides a means of getting inventory data into a format that can be manipulated by the user to produce reports or printouts of customer inventory stored at the Records Center.



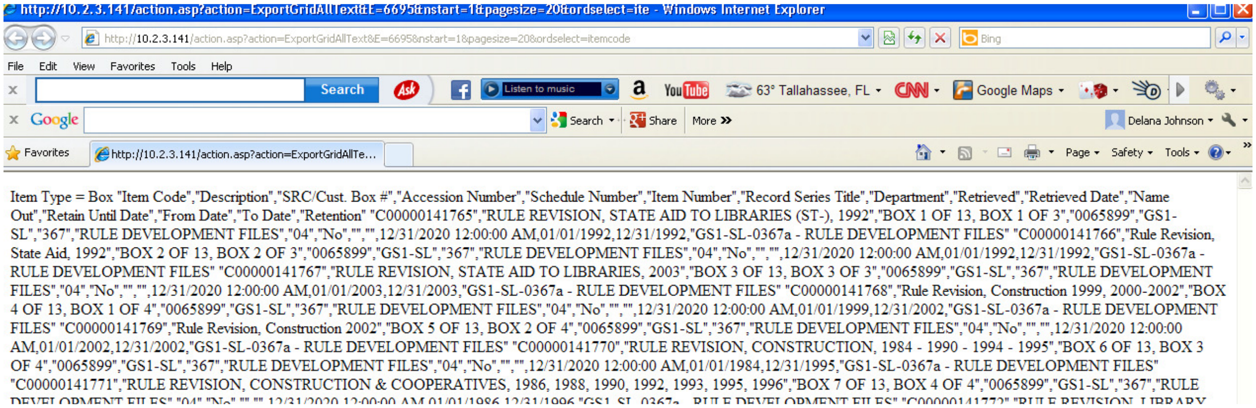
The user may choose to export all of the items in the search results or just the current page by clicking on the **<All>** or **<Page>** button next to “Excel Export” or “Text Export.”



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



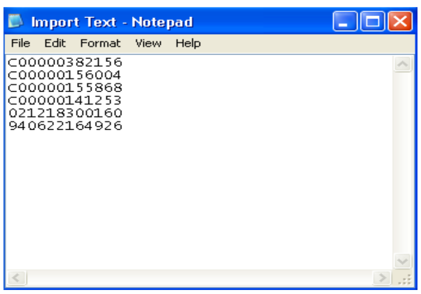
The screen shot above shows a sample **Excel spreadsheet file** containing the exported search results.



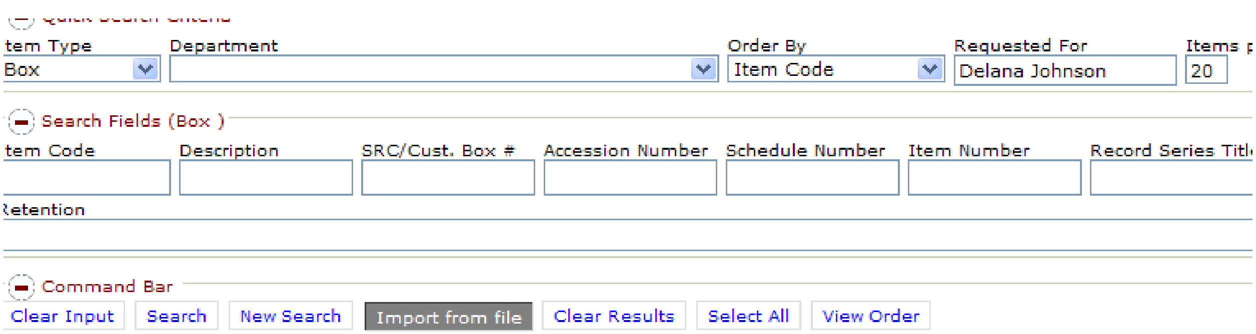
The screen shot above shows a sample **text file** containing the exported search results.

Search Using an Imported File

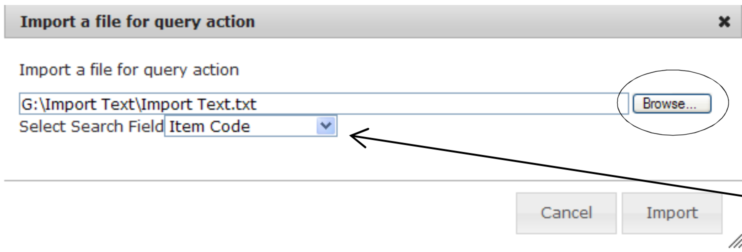
From the Search screens the user can search for items using a file to import Item Codes or Reference fields they would like to search for. The user will need to create a Notepad document using each Item Code number or Reference field they would like to search for.



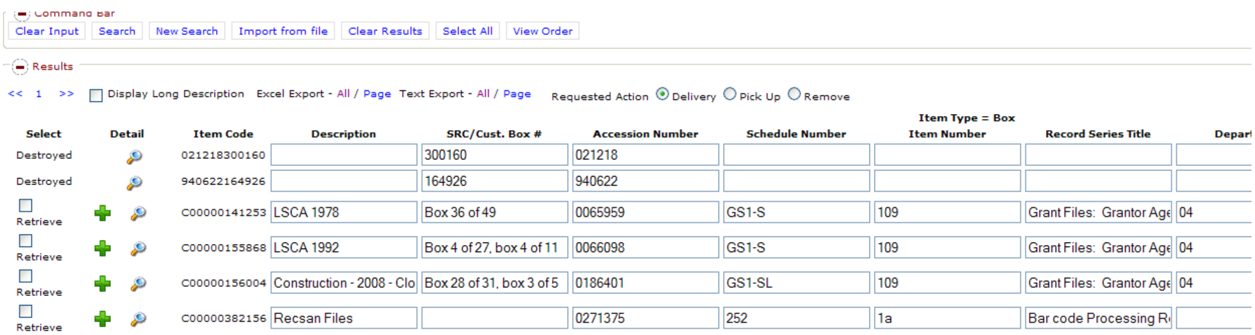
In this example we will use the import file containing Item Codes shown above. Note that the import file must be a text (.txt) file containing text only (no formatting from Word or other software packages).



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



The user will browse for the Notepad file previously created and also make a selection from the drop-down menu, selecting the field by which the user wants to search. Clicking on the **<Import>** button after selecting the file will prepare the file for processing and begin the search.



This is a sample of the search results from a file Import search. To search by a Reference field instead of Item Code, select “Reference Field” from the “Select Search Field” drop-down list. Then select **<Import>** and continue as described above.

C H A P T E R 3 – Retrieving, Refiling, and Removing Boxes and Files

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

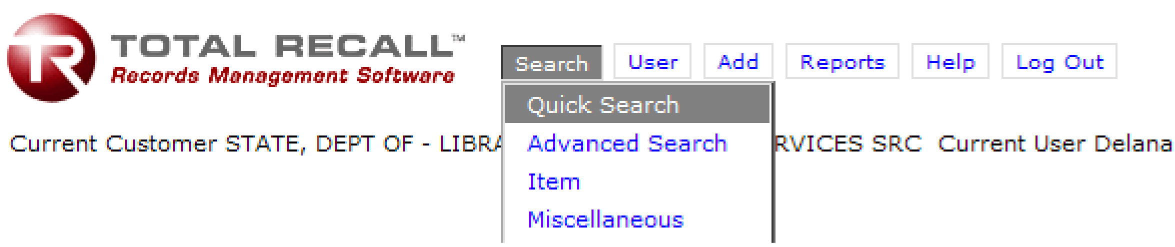
- ***Search – Quick Search***
- ***Search – Advanced Search***
- ***Search – Item***

The components of these screens are illustrated in Chapter 2. Here we will focus on the steps the user takes to retrieve, refile, or remove items using the three different screens. To display the action history on any specific item, the user can click on the magnifying glass under the Detail column. The Action History will show when an item was added, retrieved, returned, or removed. It will also provide the user with the date of the action, the work order number associated with the action, as well as the user who requested the action. The user has the ability to initiate file level requests from any of the search menu selections. For instructions on searching, indexing, and retrieving files, refer to Chapter 4.

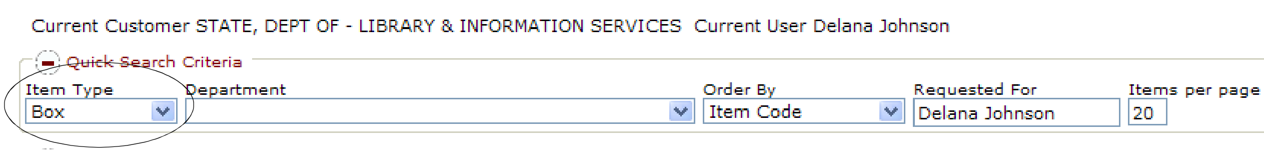
Note: Do not mix items for retrieval, refile, and removal. Each type of service should be submitted on separate orders.

From the Search - Quick Search Screen – Retrieving, Refiling, and Removing Items:

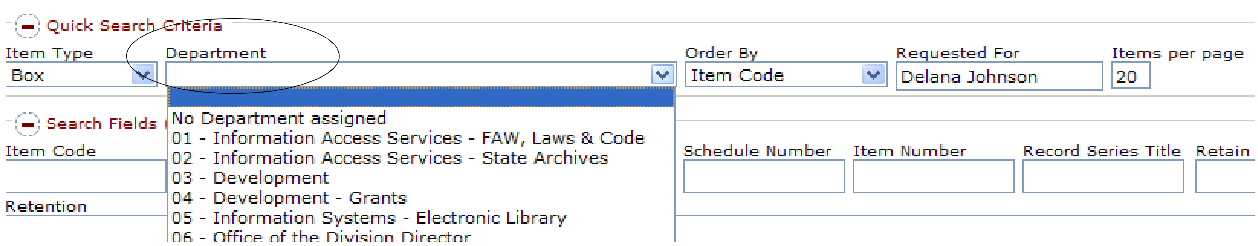
Select **Quick Search** from the Search drop-down menu.



Then from the Item Type drop-down menu select: Box or File

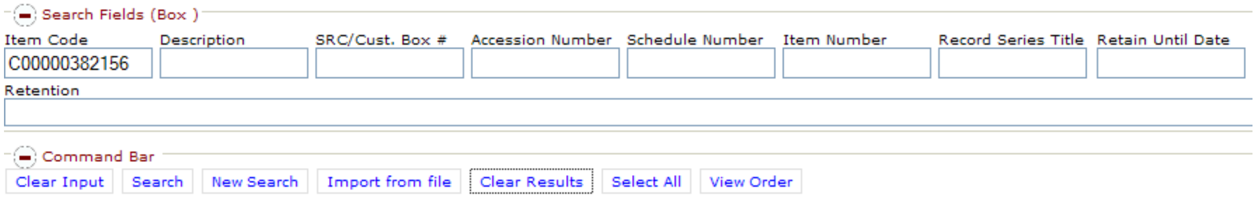


If searching for records in a specific Department, **select the Department** from the drop-down list.



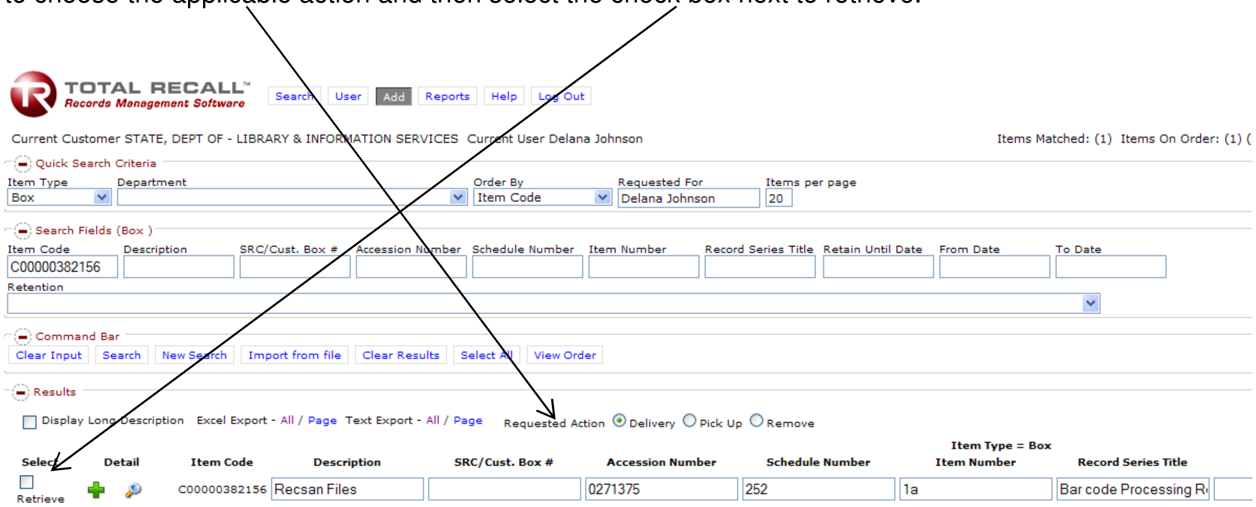
Note: If the agency's account is not departmentalized, the option to select a department will NOT be displayed.

The fields displayed are based on the Item Type selected. Type the data information to be used in the search, and then click **<Search>** or **<New Search>**.



Note: Data entered in **Search fields** must match the data entered into Total Recall. It is best to enter search criteria in **only one** of the search fields.

The **search results** are displayed at the bottom of the screen. To place this item on the user's order, make sure to choose the applicable action and then select the check box next to retrieve.



The default Requested Action is "Delivery." To "Refile" or "Permanently Withdraw" an item click on the desired choice.

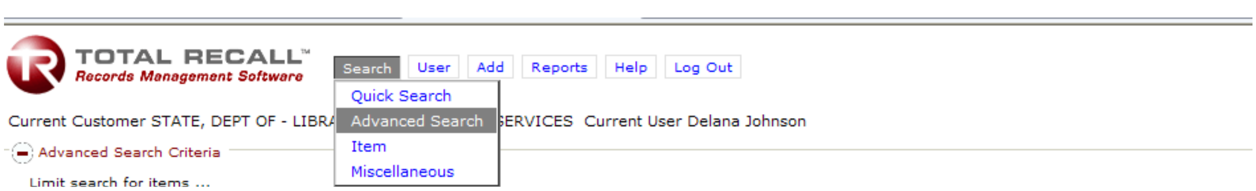
The steps above can be repeated to add additional items to an order. **Note: Do not mix items for retrieval, refile, and removal. Each type of service should be submitted on a separate order.**

Refer to Chapter 7 for instructions on sending an order.

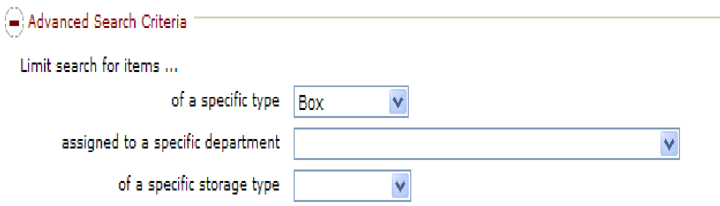
From the Search - Advanced Search Screen – Retrieving, Refiling, and Removing Items:

*The Advanced Search allows **more flexible search criteria**. For example, the user can search for items that contain a certain phrase or word, search for all **items that have been "permed out" or removed** from inventory, or search for **items that are checked out to a specific person**.*

*Select **Advanced Search** from the Search drop-down menu.*



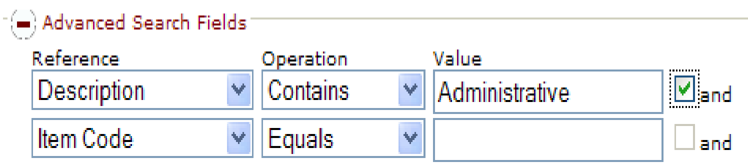
In the top Search fields, the user can select a specific type, specific department (if applicable), and a specific storage type from the drop-down menu selections.



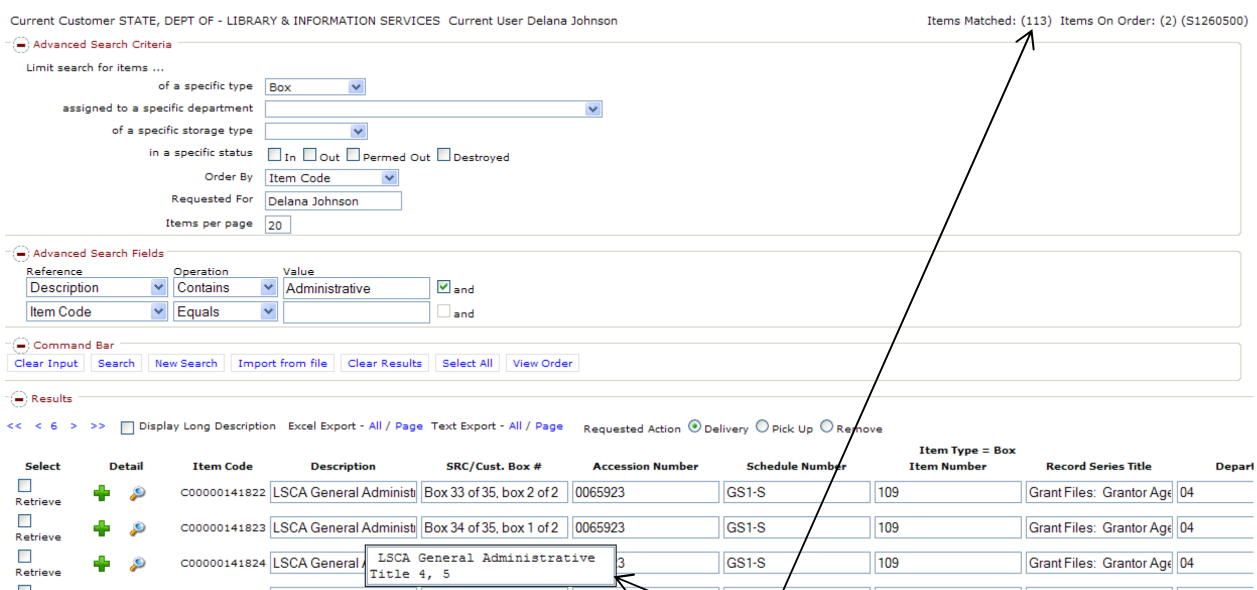
Phrase or Key Word Searches

A user can perform searches on inventory using a phrase or certain key word. Select the **<Reference Fields>** in which the user wants to perform the search. Select the desired **<Operation>** from the drop-down menu. Checking the box next to the word **<and>** allows the user to enter additional search criteria.

Enter search criteria and click **<Search>** or **<New Search>**.



Note: In the search criteria above, where "Description Contains Administrative," results will include any item in which the word "Administrative" was a word within the description field. If the user changed the Operation to "Equals," the search would return results where "Administrative" was the only word within the "Description" field.



In the example above, the search returned and displayed 113 items that matched the Search criteria. Mousing over the "Description Field" produces a pop-up that will display the entire description. The default Requested Action is "Delivery." To "Refile" or "Remove" an item, click on the desired choice. At this point, when the user clicks the check box under the "Select" column, the action will add the item(s) to the user's order.

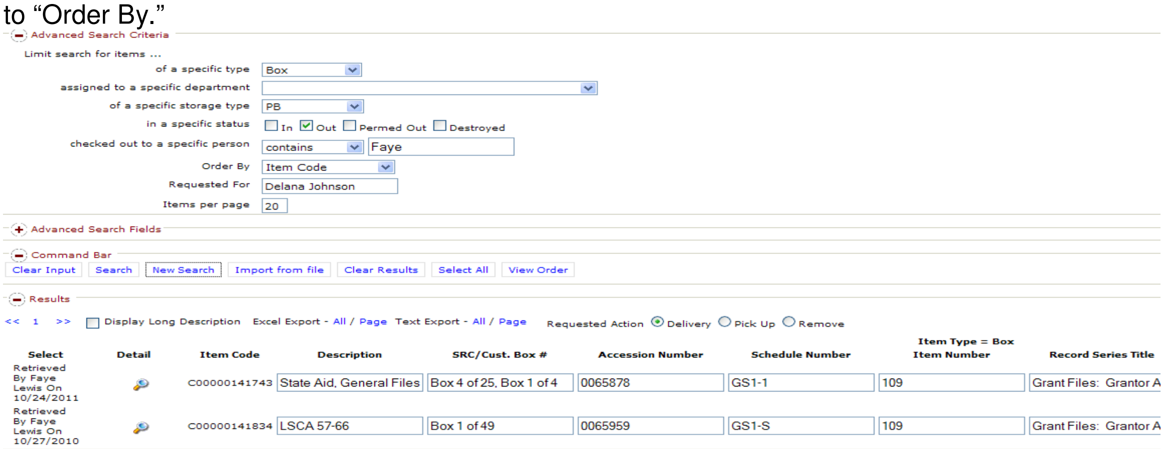
Refer to Chapter 7 for instructions on sending an order.

Items in a Specific Status (Removed, Retrieved, etc.) or Checked Out to a Specific User

A user can perform a search of items in a specific status by using only the information in the "Advanced Search Criteria" box.

Note: The user will need to expand the “Advanced Search” fields and make sure to remove any information that may be typed into those fields.

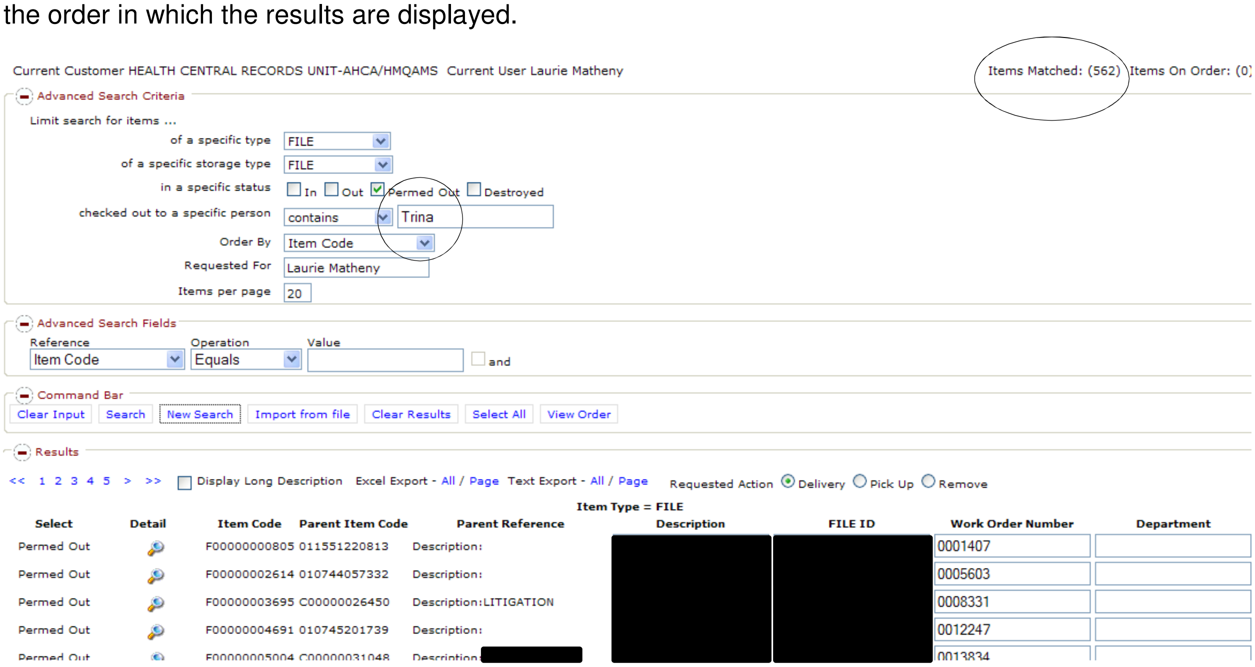
To conduct the search, the user will select the “Specific Type” for which they want to search and select the status for which they want to search. If the user selects “Out,” “Permed Out,” or “Destroyed,” the system will provide additional fields for the search. For “Destroyed” items, the user will leave the “Specific Person” field blank. The user will then need to select the order in which they want the results to be returned from the drop-down menu next to “Order By.”



In the example conducted above, we searched for any boxes that were in a specific status of “Out” (retrieved), where the “Checked Out to a Specific Person” field contains the name “Faye.” The results returned two items and, under the “Select” column, show who retrieved them and the date the items were retrieved. For file searches, the user will need to change the specific type to “File.”

A user can also conduct searches for items in a specific status for users that no longer have access to Total Recall.

The user will select the “Specific Type” and “Specific Storage Type.” They will also need to select a “Specific Status” of “Out,” “Permed Out” or “Destroyed.” The user will need to input user information into the “Checked Out to a Specific Person” field. Remember to select “Order By” from the drop-down menu if the user wants to change the order in which the results are displayed.



Note: The black boxes above conceal redacted information to protect client inventory information. The results displayed during this search will have data in these fields.

The example above shows a search conducted for any files in a specific status of "Permed Out" and where the "Checked Out to a Specific Person" field contains the name "Trina" (not an authorized user at the time of search). Our results returned 562 items and, under the "Select" column, show the items were "Permed Out."

TOTAL RECALL™
Records Management Software

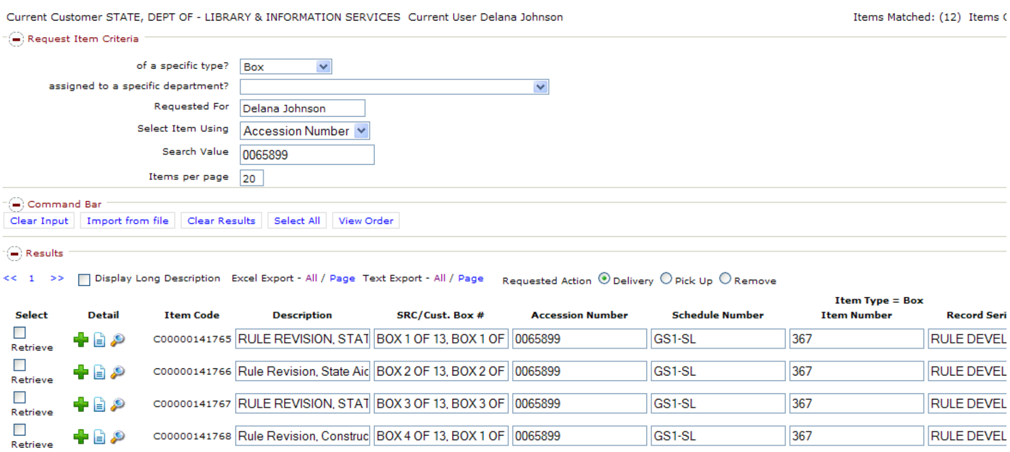
Item History Report (F00000000805)

Work Order	Action	Date	Requested For	Requested By	Comments
0008727	Remove	04/18/2003	Trina Jenkins	Trina Jenkins	
0001407	Retrieve	01/07/2003	Trina Jenkins	Trina Jenkins	
0001407	Add	01/07/2003	Trina Jenkins	Trina Jenkins	

In the "Item History Report" above, we can see the Action History details for file F00000000805.

From the Search - Item Screen – Retrieving, Refiling, and Removing Items:

Select Item from the Search drop-down menu. The user will select the "Specific Type" of item for which they want to conduct a search. On the "Select Item Using" drop-down menu, the user will select the Reference Field in which they want to perform the search. In the "Search Value" field, the user will type in the data for which they want to search. After entering the search information, hit the **<Enter> Key**.



Note: Data entered in **Search fields** must match the data entered into Total Recall. The options available in the "Select Item Using" drop-down menu will be based on the "Specific Type" selected.

In the Search example conducted above, we searched for any boxes created under accession number 0065899. Our results returned 12 items and under the Select column, our results show the current status of the items.

The default Requested Action is "Delivery." To "refile" or "remove" an item, click on the desired choice. At this point, when the user clicks the check box under the Select column, the action will add the item(s) to the user's order.

Refer to Chapter 7 for instructions on sending an order.

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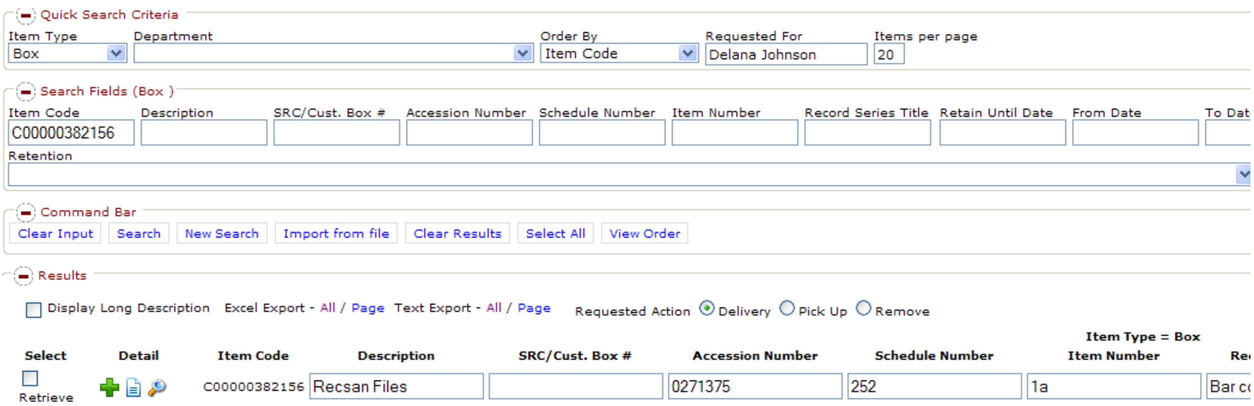
C H A P T E R 4 – Searching For, Indexing, and Retrieving Files

This chapter explains how to index and retrieve files. If the file the user is looking for has already been indexed, and the user knows the Item Code or Barcode assigned to the file, they can retrieve, refile, or remove the file by following the instructions in Chapter 3 (select Item Type “File”). If the user does not know if the file has an assigned Item Code or Barcode, follow the instructions below.

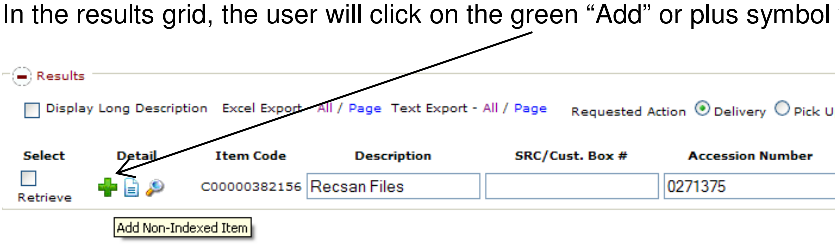
The following steps can be performed from any of the Search screens – Quick Search, Advanced Search, or Search – Item.

If the user does not know if the file has been indexed, they must **first search for the box** in which the file is located. A user may perform this search in any of the Search Menu selections. The user will search for Item Type “Box” in the Quick Search Criteria fields and must enter the data by which they will search in the Search Fields. Click **<Search>** or **<New Search>**.

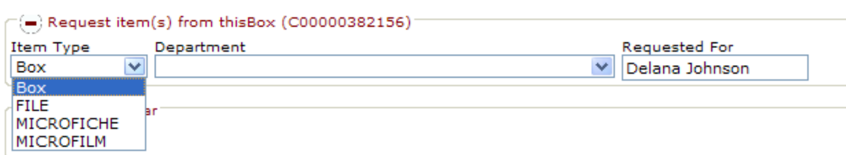


In the Search example conducted above, we searched for box C00000382156 and will be able to index and request files from the box.

In the results grid, the user will click on the green “Add” or plus symbol which will open an additional window.

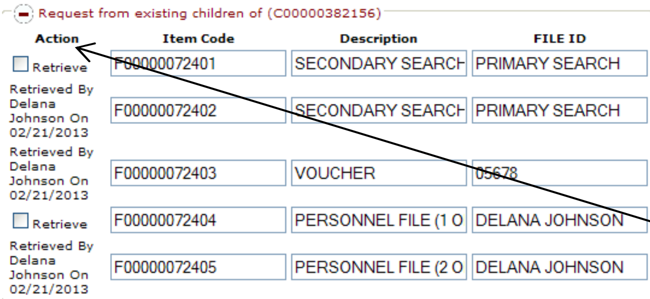


The default Item Type is “Box.” The user will need to choose “File” from the drop-down menu.



This action will open up two additional selections: Add or remove a request from the order, and Request from existing children (files). The user should review the existing children to see if the file(s) are indexed and, if so, currently available to retrieve.

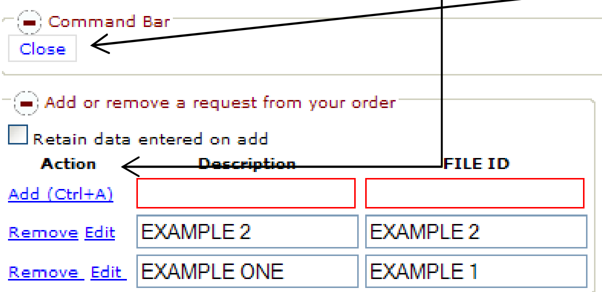
If the file the user needs to request has already been indexed into the box, the user can click the **<Retrieve>** check box and it will place the item on the user’s order. If the indexed file is the only file needed, the user can click **<Close>** on the command bar to close the index screen.



In the example above, the system shows there are five files indexed into this box. Under the “Action” field, it also shows that two are available to be retreived and three are already out on reference and haven’t been returned.

If the file(s) needed are not currently indexed, the user will have to add an index for the files. Under the “Add or Remove a request from your order” selection, the user will enter the file information in the Description and File ID Fields. Once the information is entered, the user will click **<Add>** under the Action column. When the user clicks on the **<Add>** option, new data entry fields will be populated so the user can add additional files into that box.

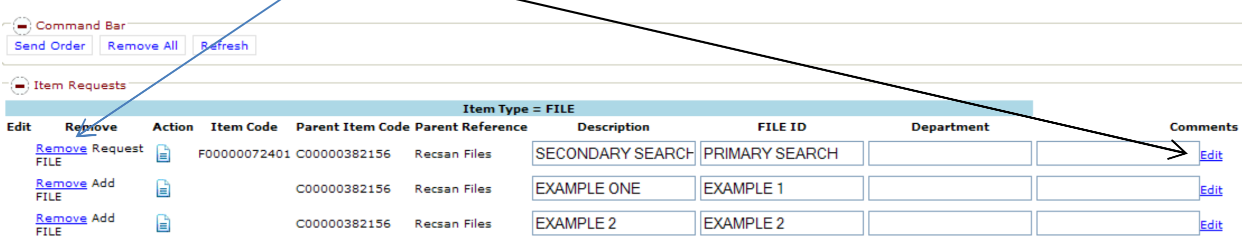
Once the user has added an index for all records needed from the box, click the **<Close>** button under the command bar. From the main screen, the user may search for the next box they need to request a file from.



Note: When indexing files, the user should place the primary search information in the “File ID” field. For example; if the files are arranged by a name, the user should type the name into the “File ID” field. If there is secondary seach information, place that information into the description field. For example: if the files are arranged by name but have a case number on the tab, place the case number into the description field.

Note: When a user knows there are multiple files with the same file name/number within a box, it is helpful for the user to create an index for each file using the distinguishment (1 of __) in the “File ID” field. We create a label for each file that leaves our facility.

Once back on the search screen, click the **<User: View Order>** button to see the files placed on the order. The user also has the ability to add comments to each line of the work order on this screen by clicking the **<Edit>** button and typing the comments into the field. If the user needs to remove an item(s) from the order, they may click the **<Remove>** button.



Refer to Chapter 7 for instructions on sending an order.

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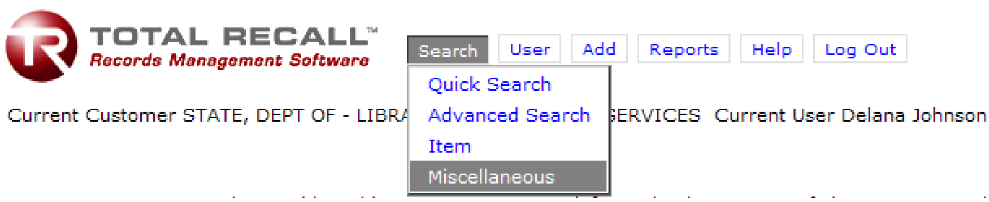
C H A P T E R 5 – Ordering Flat Boxes and Barcode Labels

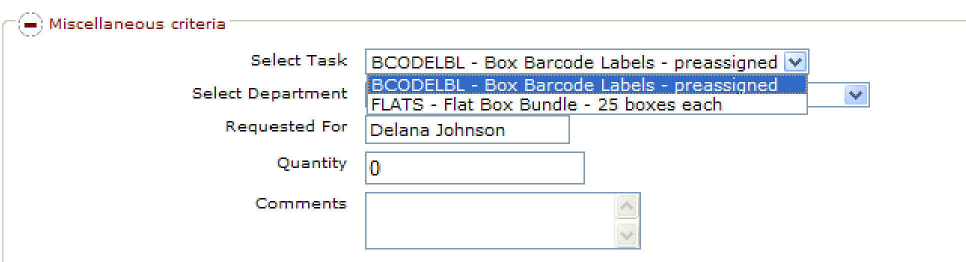
This chapter explains how to order records storage boxes (“flats”) and barcode labels. This is done from the Search – Miscellaneous menu.

Note: Preassigned item codes (barcodes) are assigned to the account from which the labels are ordered. If a user has access to multiple accounts, they will need to be sure to order the labels for the account under which they will be accessioning new records. Barcode labels can only be shared between users having access to the same account.

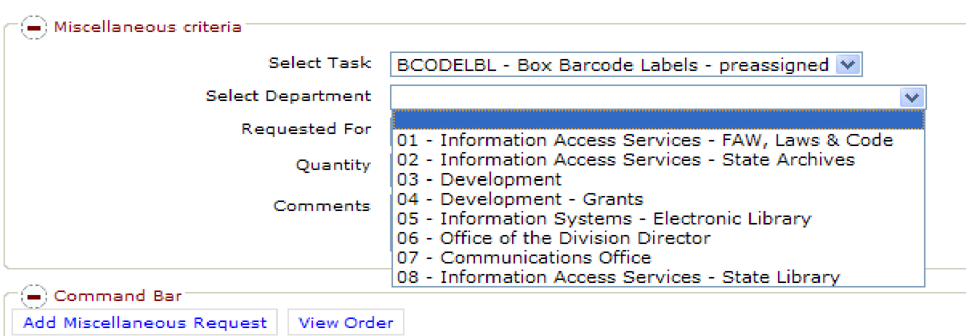
*Select **Advanced Search** from the Search drop-down menu.*



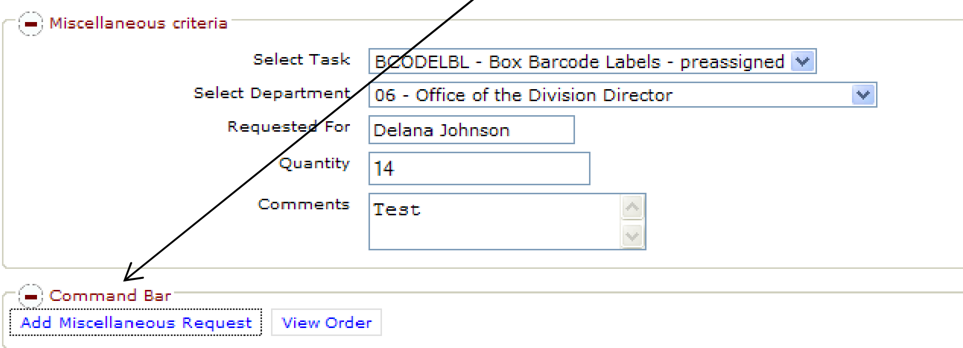
Select the “task” the user would like to perform.



Select “Department” from drop-down menu (if applicable).



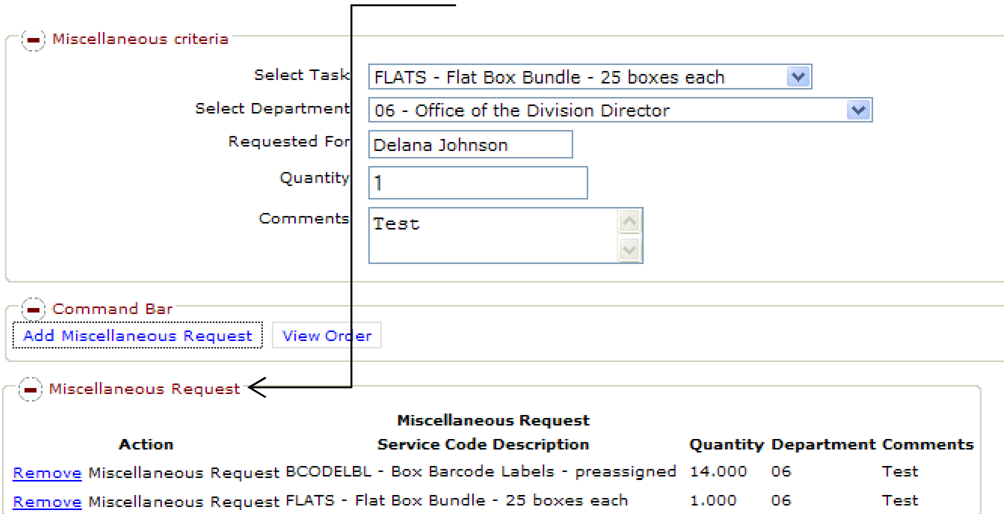
Enter Quantity and Click **<Add Miscellaneous Request>** in Command Bar.



Note: Box barcode labels are prinited in increments of 14 barcodes per page. A user may order the exact quantity of labels requested. The user may receive more labels than requested due to these printing increments.

Note: “Flat Box Bundle” refers to a bundle of 25 boxes. In the Quantity field, the user will input the number of bundles they wish to order.

To add additional miscellaneous items, follow the same steps above. The user will see the Miscellaneous Request(s) added to the current order.



Comments placed in the Comments box on this page will be submitted next to the line item on the work order. This is helpful when a customer needs to add additional information regarding a specific item on an order. If the user has special instructions for the entire order, those comments should be placed from the Send Order Screen.

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

Refer to Chapter 7 for instructions on sending an order.

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C H A P T E R 6 – Adding New Boxes to Inventory

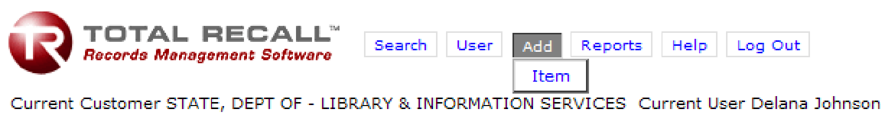
This chapter explains how to create an order to have **new** boxes picked up and stored in the Records Center. Prior to entering the boxes in Total Recall, the user must label each box with a records storage box label and a barcode label. For further instructions on packing and labeling boxes for storage,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

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

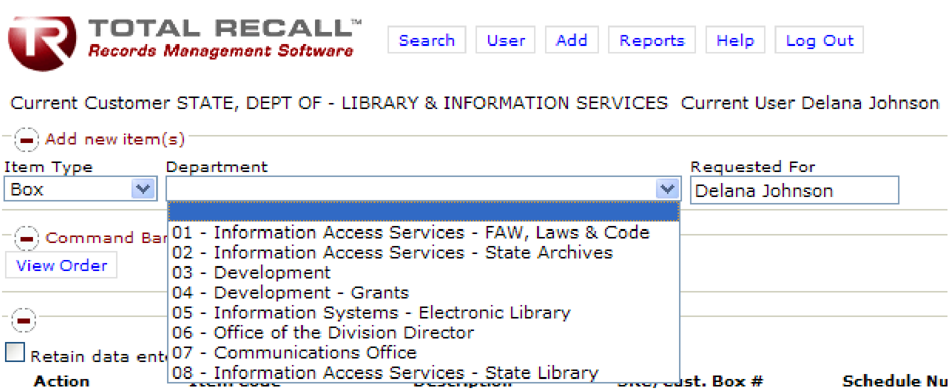
Important notes for accessioning new records:

- Records must be ready for pickup prior to submitting a new accession work order.
- An index of records in each box should be created and maintained by the user.
- Only one retention schedule may be used per order.
- Description Field should contain language that will (1) assist the user and any future users with locating specific records and (2) assist Records Center staff with the review process used to determine if a user has chosen the correct retention schedule.

Select: **Add – Item**

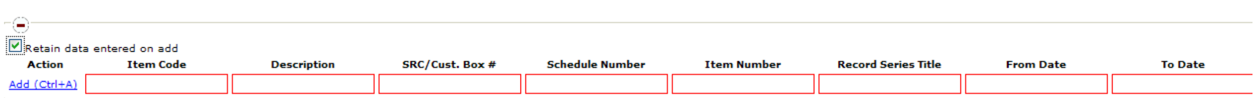


Select Department if applicable.



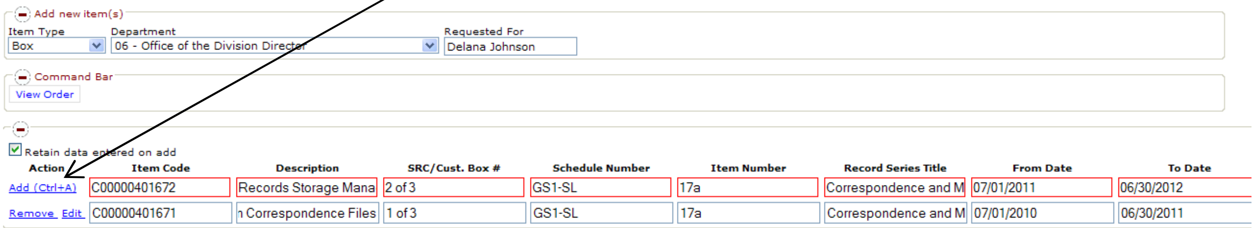
Note: If the agency's account is not departmentalized, then the option to select a Department will not be displayed.

A grid will be displayed where the user will enter box information, one box per line. All fields displayed are mandatory fields and must include accurate data. If the user is adding more than one box, check the "Retain data entered on add" check box to retain information entered on the Add line.



NOTE: The top line of the grid is the "Add" line.

At a minimum, the Item Code and SRC/ Cust. Box # will need to be corrected on the retained data. Once the user has corrected the data, click the **<Add>** button to add the additional item(s) to the order.



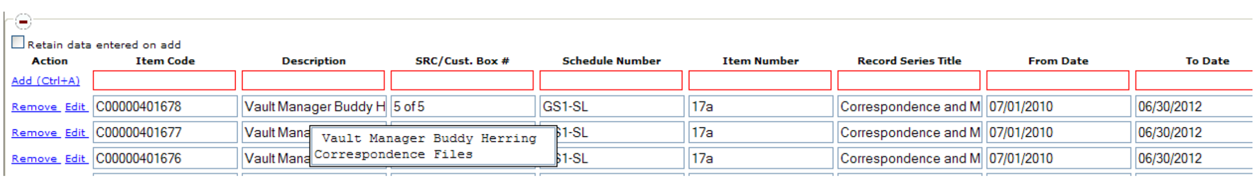
In the example above, for new item C00000401672, we edited the following retained data: Item Code, SRC/Cust. Box #, From Date, and To Date. The user will continue this process until all items are added to the order.

NOTE: DESCRIPTION and SRC/CUST. BOX # fields are limited to 100 characters. When entering the Description, avoid vague terms such as "Miscellaneous." If describing a person's files, include the person's position title. For example, rather than saying "Bob Smith's Files," use "Director of Marketing Bob Smith's Promotion Planning Files." Make a note of the range of records in the box for future reference. Please see *Appendix C – Box Information in Total Recall* for more information about Description and From and To Dates.

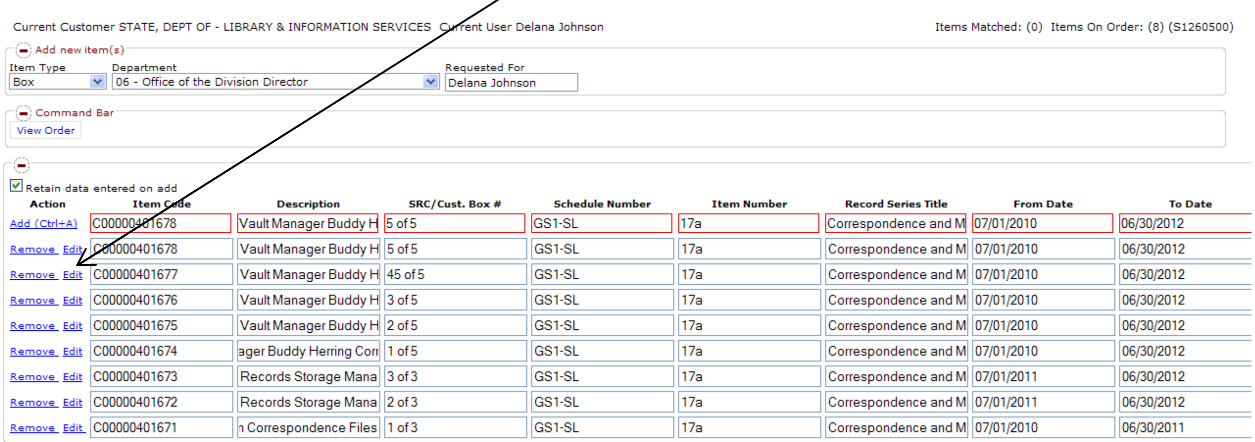
SPECIAL NOTE ON PACKING RECORDS IN STATE RECORDS CENTER (SRC) BOXES: The user must pack only one record series into any one box and **ONLY ONE RECORD SERIES IS ALLOWED ON AN ORDER**. In other words, all the boxes entered on a New Accession work order MUST contain the same type of records and use the same Schedule Number, Item Number, and Record Series Title.

We recommend that the user proof their data entry before leaving the add screen. Once a user exits the add screen, data cannot be edited. If changes are necessary, the items must be removed from the order and re-entered following the steps outlined above.

By placing the cursor over any field, a pop-up will provide the user with all data entered into that field.

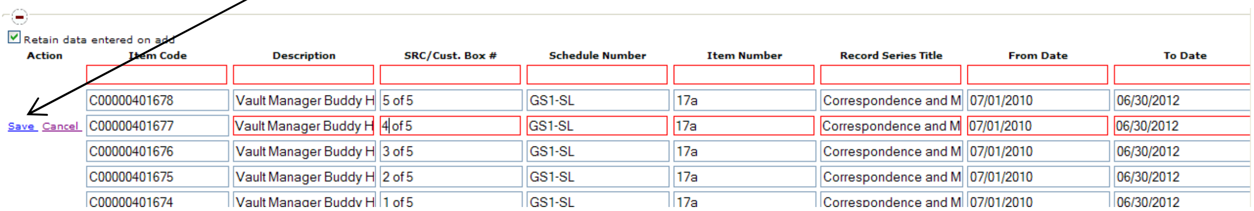


To edit data on an item, the user will click **<Edit>** on the line for the item that needs to be corrected.



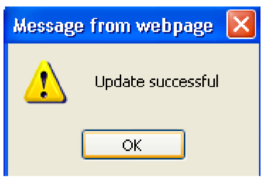
In the examples below and above, we will edit the SRC/Cust. Box # for Item Code C00000401677.

The fields that may be edited will be outlined in red like the example below. Once the user has corrected the information, click the **<Save>** button.



NOTE: Item Code numbers cannot be edited. If a mistake is made, remove the item from the order and re-enter following the steps outlined above.

Click **<OK>** in the pop-up dialogue box.



Refer to Chapter 7 for instructions on sending an order.

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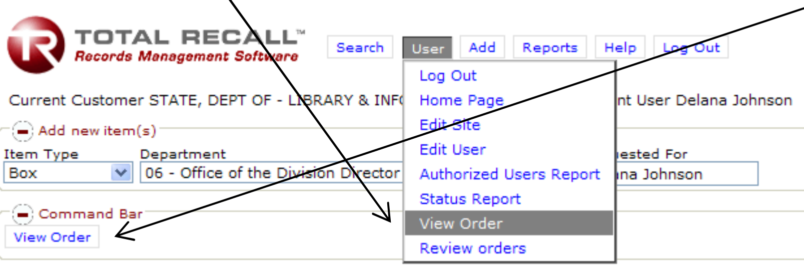
C H A P T E R 7 – Sending Your Order

This chapter explains the steps involved in sending an order. After the user has placed the items they need on their order, they are ready to send it.

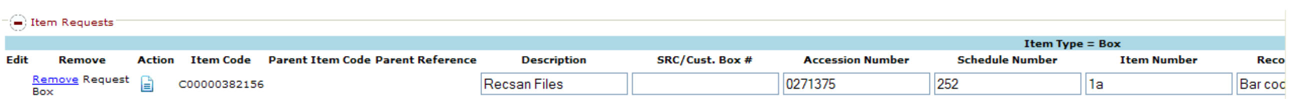
The user should first **view the order**. A user can view an order by (a) clicking **<View Order>** in the Command Bar or (b) selecting **<View Order>** from the User drop-down menu.



Make sure the items the user wants are on the order.

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

Results displayed on the View Order screen will be sorted by Item Type.

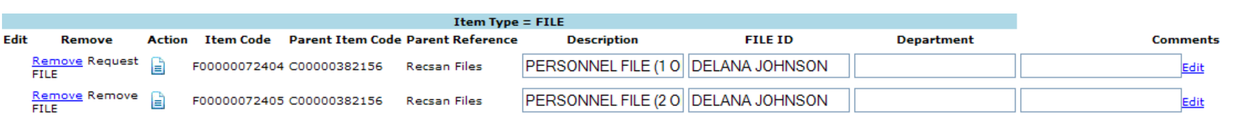


Item Requests

Item Type = Box

Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description	SRC/Cust. Box #	Accession Number	Schedule Number	Item Number	Reco
	Remove	Request Box	C00000382156			Recsan Files		0271375	252	1a	Bar coc

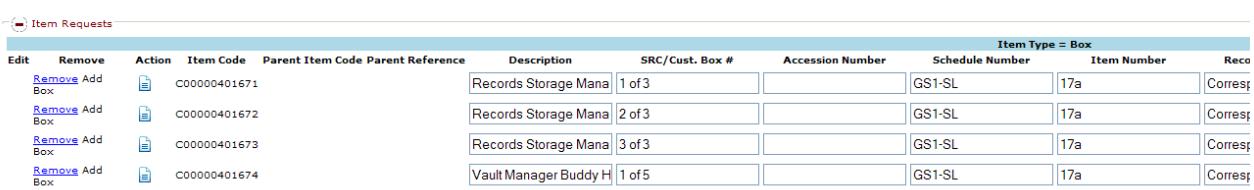
In the example above, our order shows we are requesting to retrieve item C00000382156.



Item Type = FILE

Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description	FILE ID	Department		Comments
	Remove	Request FILE	F00000072404	C00000382156	Recsan Files	PERSONNEL FILE (1 O	DELANA JOHNSON			Edit
	Remove	Remove FILE	F00000072405	C00000382156	Recsan Files	PERSONNEL FILE (2 O	DELANA JOHNSON			Edit

In the example above, our order shows we are requesting to retrieve item F0000072404 and remove (permanently withdraw) item F0000072405.



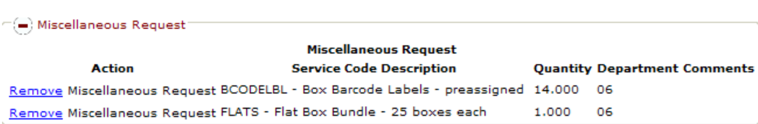
Item Requests

Item Type = Box

Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description	SRC/Cust. Box #	Accession Number	Schedule Number	Item Number	Reco
	Remove	Add Box	C00000401671			Records Storage Mana	1 of 3		GS1-SL	17a	Corresp
	Remove	Add Box	C00000401672			Records Storage Mana	2 of 3		GS1-SL	17a	Corresp
	Remove	Add Box	C00000401673			Records Storage Mana	3 of 3		GS1-SL	17a	Corresp
	Remove	Add Box	C00000401674			Vault Manager Buddy H	1 of 5		GS1-SL	17a	Corresp

In the example above, our order shows we are requesting to add or accession new boxes.

Miscellaneous Requests will be placed into a separate box.



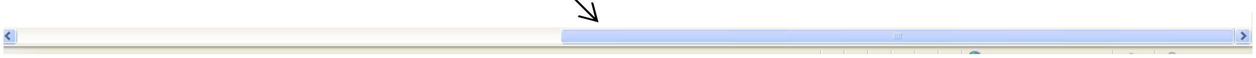
Miscellaneous Request

Miscellaneous Request

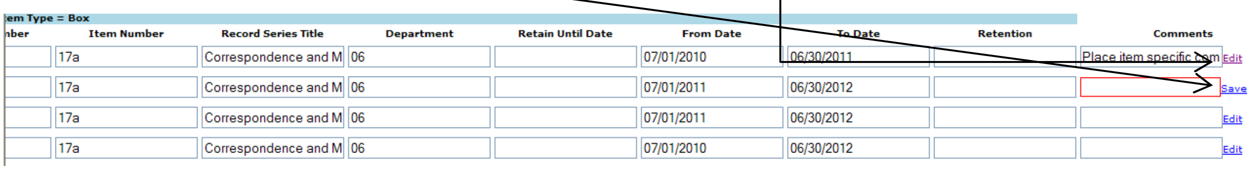
	Action	Service Code Description	Quantity	Department	Comments
Remove	Miscellaneous Request	BCODELBL - Box Barcode Labels - preassigned	14.000	06	
Remove	Miscellaneous Request	FLATS - Flat Box Bundle - 25 boxes each	1.000	06	

In the example above, our order shows we are requesting 12 preassigned item codes and one bundle of flats. A user may enter item-specific comments from the View Order screen. The comments will apply only to the item where the comments are placed. A user may use this field to expand on a description if the 100 character limit was met while adding the new accession or make notes to themselves for internal purposes.

While in the View Order screen, use the scroll bar at the bottom of the screen to scroll to the right side of the page.



The user will click on the **<Edit>** button to enable the comments field to accept data. Once the comment is entered, the user must click the **<Save>** button.

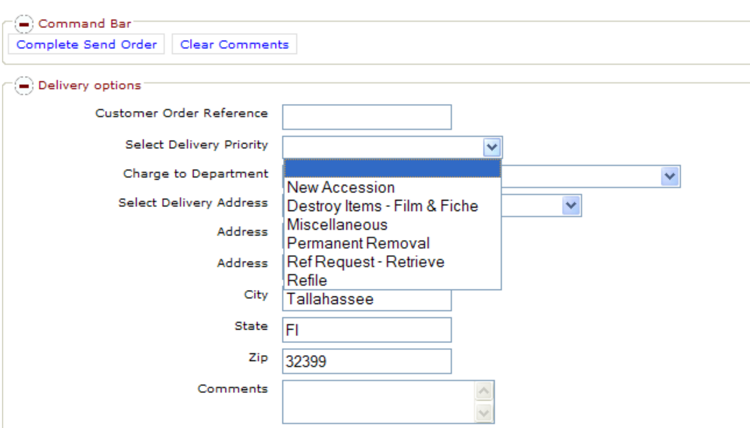


In the above example, a comments box with a red border indicates that particular field has been opened to accept data.

Once the user has viewed the order to make sure it is correct, they must press the **<Send Order>** button in the Command Bar.

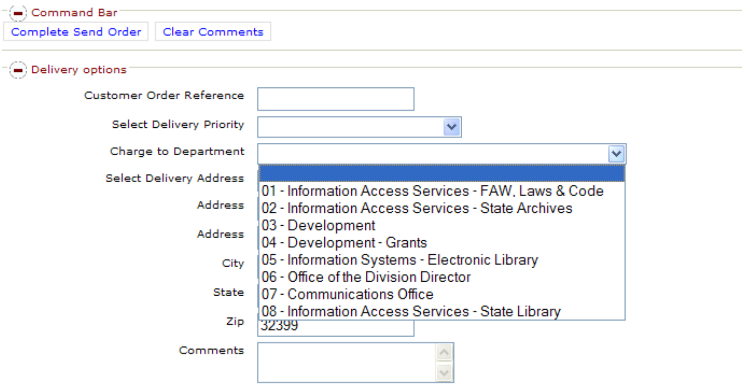
On the Complete Send Order Screen, there are several drop-down menus in which the user must make an appropriate selection.

Customer Order Reference can be left blank or used to make a note for the user that will print on the work order. You may **Select Delivery Priority** from the drop-down menu. This selection must match the type of service requested.

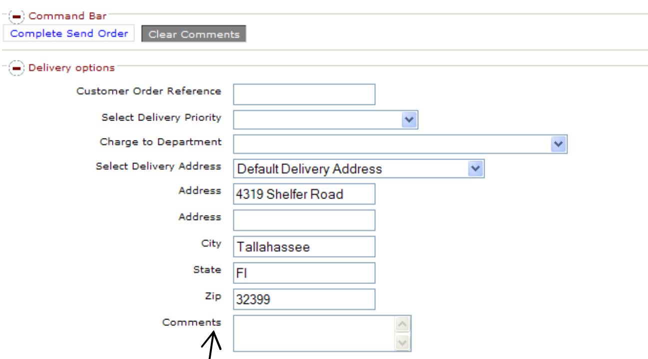


Note: A user cannot mix services on a work order. Selection of a delivery priority will alert Record Center Staff on the type of order the user is sending. It also establishes a due date for the order.

Select Department, if applicable.



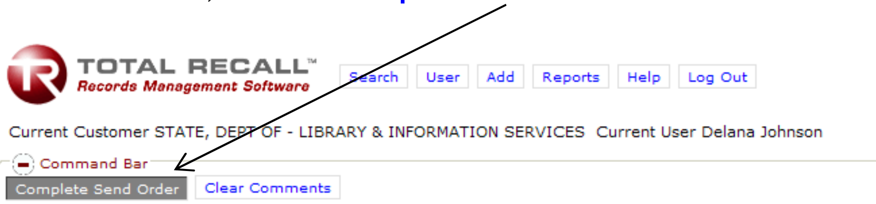
Select Delivery Address is used to select a different address, if necessary. Select from the choices on the drop-down.The user may also type the appropriate address in the available fields.



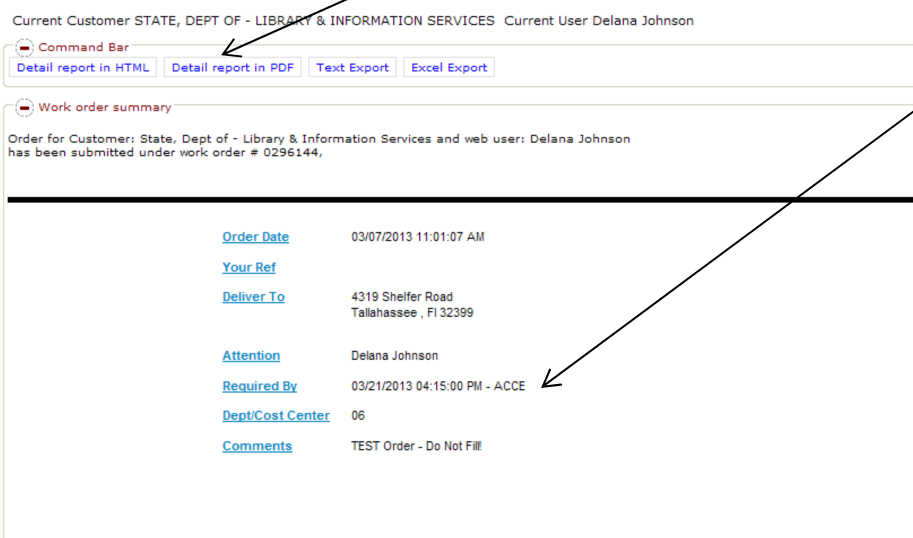
Note: The Comments box can be used for:

- Special delivery instructions, including:
  - Delivery to someone other than the user submitting the order.
  - Indicate a user would like to pickup items rather than have them delivered.
  - Authorize a representative to pick up items for a user.
  - Indicate an Emergency Order (see Note below regarding emergency orders).
- A note for contact corrections.
- Any notes or comments the user needs to relay to Records Center staff.

To send the order, click the **<Complete Send Order>** button in the Command Bar.



After the order is sent, the **Send Order Results** screen will display. This screen includes the **Work Order number**, links to view the **Work Order Line Report** in both HTML and PDF formats, and a **Due Date** for the order.



Current Customer STATE, DEPT OF - LIBRARY & INFORMATION SERVICES Current User Delana Johnson

Command Bar

Detail report in HTML | Detail report in PDF | Text Export | Excel Export

Work order summary

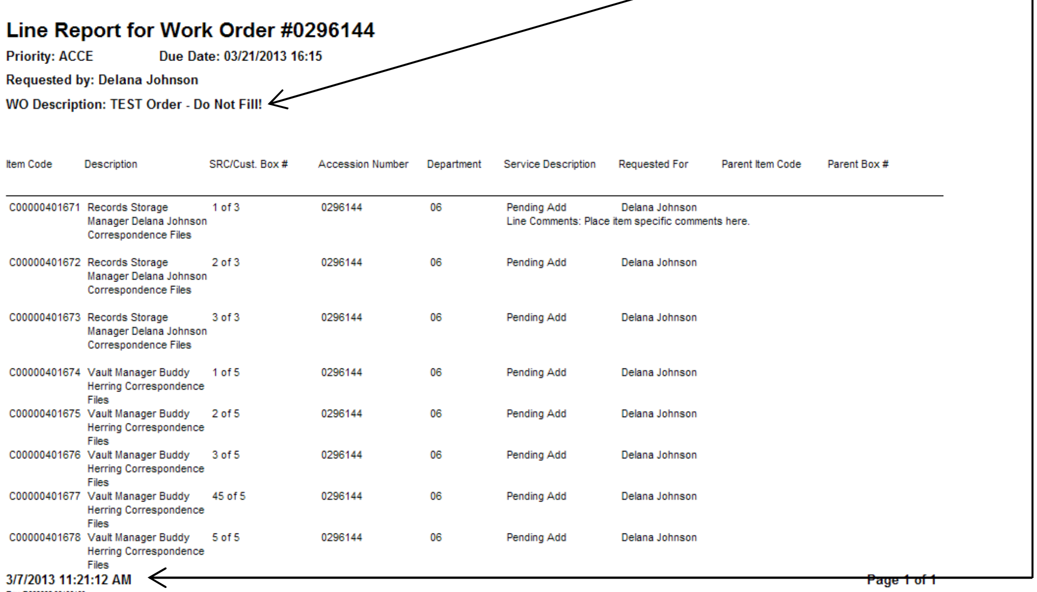
Order for Customer: State, Dept of - Library & Information Services and web user: Delana Johnson
has been submitted under work order # 0296144,

Order Date	03/07/2013 11:01:07 AM
Your Ref	
Deliver To	4319 Shelfer Road Tallahassee , Fl 32399
Attention	Delana Johnson
Required By	03/21/2013 04:15:00 PM - ACCE
Dept/Cost Center	06
Comments	TEST Order - Do Not Fill!

Note: Make note of the work order number for future reference.
Note on **Due Date**: The Due Date printed on the Work Order Confirmation Screen is a guideline for when items will be picked up or delivered. Items may be picked up or delivered at any time between the time the order is sent and the Due Date.
Common issues that may cause the due date to not match what is printed on the order:

- Reference or Refile orders: More than 12 items on the order.
- Accession Orders that have errors.

Click on the links to **Work Order Line Report** to see details of the order. The Work Order Line Report shows the order type, items on the order, the work order due date, comments field, and the **date and time** the order was submitted.



Line Report for Work Order #0296144

Priority: ACCE **Due Date: 03/21/2013 16:15**

Requested by: Delana Johnson

WO Description: TEST Order - Do Not Fill!

Item Code	Description	SRC/Cust. Box #	Accession Number	Department	Service Description	Requested For	Parent Item Code	Parent Box #
C00000401671	Records Storage Manager Delana Johnson Correspondence Files	1 of 3	0296144	06	Pending Add Line Comments: Place item specific comments here.	Delana Johnson		
C00000401672	Records Storage Manager Delana Johnson Correspondence Files	2 of 3	0296144	06	Pending Add	Delana Johnson		
C00000401673	Records Storage Manager Delana Johnson Correspondence Files	3 of 3	0296144	06	Pending Add	Delana Johnson		
C00000401674	Vault Manager Buddy Herring Correspondence Files	1 of 5	0296144	06	Pending Add	Delana Johnson		
C00000401675	Vault Manager Buddy Herring Correspondence Files	2 of 5	0296144	06	Pending Add	Delana Johnson		
C00000401676	Vault Manager Buddy Herring Correspondence Files	3 of 5	0296144	06	Pending Add	Delana Johnson		
C00000401677	Vault Manager Buddy Herring Correspondence Files	45 of 5	0296144	06	Pending Add	Delana Johnson		
C00000401678	Vault Manager Buddy Herring Correspondence Files	5 of 5	0296144	06	Pending Add	Delana Johnson		

3/7/2013 11:21:12 AM **Page 1 of 1**
Rev: D323668.20120109

In the above example, we chose **Work Order Line Report** in HTML format.

It is recommended that the user print this page for future reference.

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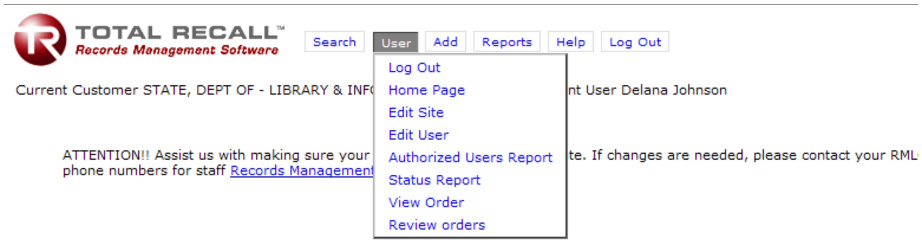
C H A P T E R 8 – The User Menu Options

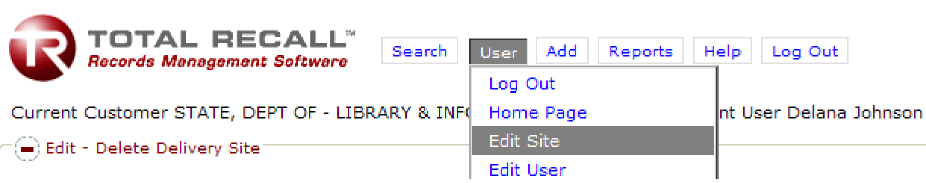
The user menu contains some of the administrative functions of the web module. The administrative functions allow a user with the associated permissions the ability to edit and add user delivery sites, edit and add Web users, view the status of work orders created for their agency, view pending orders not yet submitted, and change FBU accounts (if applicable). Users will also be able to log off from the Web session, as well as return to the Web home page from the User menu.



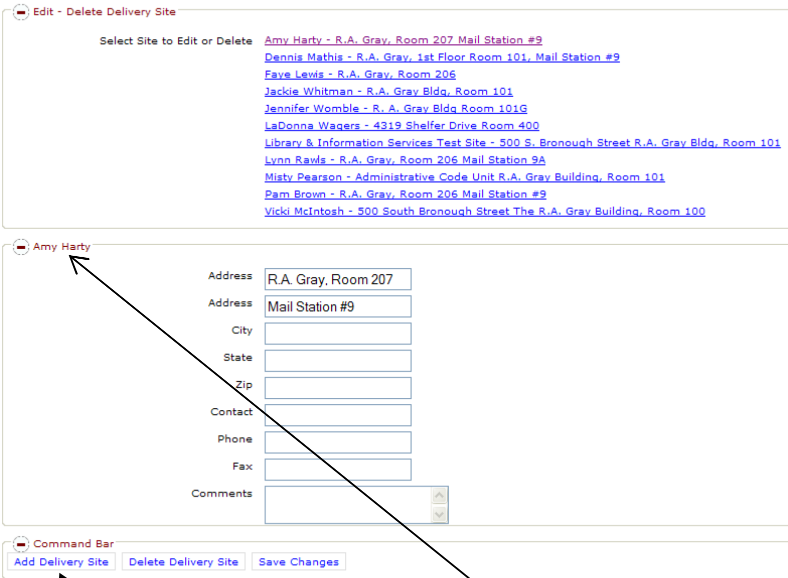
Log Out - The “Log Out” option allows the current user to sign out or log out of the Web module. Any items placed on the user’s order not yet sent will remain on the order and can be sent or removed from the order later. Please note that orders that have not been sent do not affect the status of any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

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

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



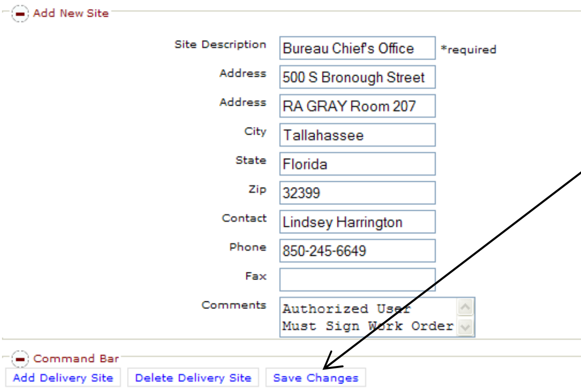
To Edit or Delete a specific site, the user will click on the site from the available list. To change the site, the user will type the information in the applicable fields and click the **<Save Changes>** button in the Command Bar.



In the example above, we selected the "Amy Harty" site to edit. To delete the Delivery Site, click **<Delete Delivery Site>** in the Command Bar. **WARNING! The user will not receive a confirmation warning before deleting a site. Clicking the <Delete Delivery Site> will delete it from Total Recall!**

To Add a new site, click on **<Add Delivery Site>** in the command bar.

The Add New Site screen will be displayed. The user must fill out all applicable information. Site description is required. After the text is typed in the boxes, the user will click **<Save Changes>.**



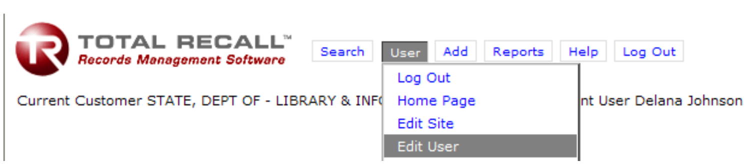
The new site will appear in the Edit – Delete Delivery Site screen.

Note: Site Description cannot be changed. We recommend that an agency not use personnel names as a Site Description. We recommend using program office, work unit names, specific building areas or more general information when selecting a Site Description.

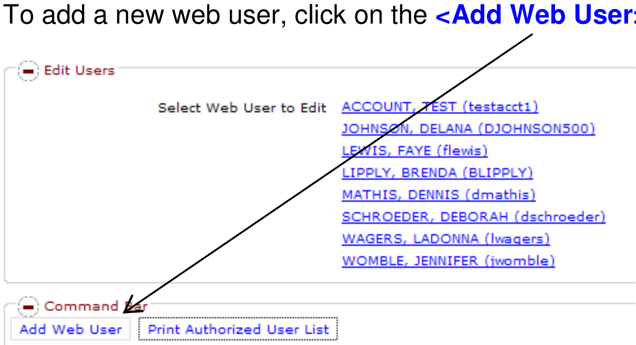
Edit User - The "Edit User" option provides Authorized Users the ability to add new or edit and delete existing users. The agency RMLO will want to consider security issues related to agency policy and procedure when setting up users. It is very important to remember that a user has the ability to affect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

> ***NOTE*** *A user cannot add permissions they do not have to another user or themselves. For example, if a user does not have permission to Remove Items from inventory, they will not be able to assign that permission to another user.*

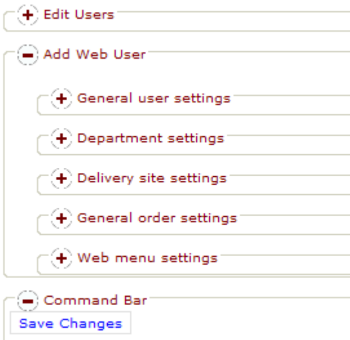
The Total Recall™ Web module software has extensive security features that allow several levels of options for users. These options will be reviewed in detail. To add, edit, or delete a user, click on the **<Edit User>** button.



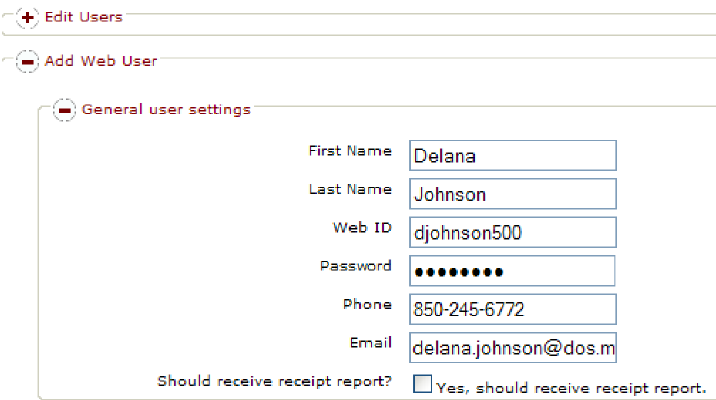
To add a new web user, click on the **<Add Web User>** in the Command Bar.



There are several expandable menus that appear. Each will be described in detail below.

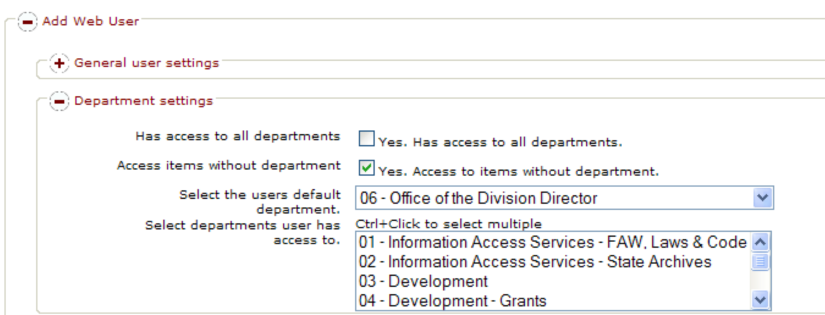


General User Settings – The user will enter the new user's name, Web ID (login), password, and contact information in these fields. The Web ID must be a unique login for Total Recall.



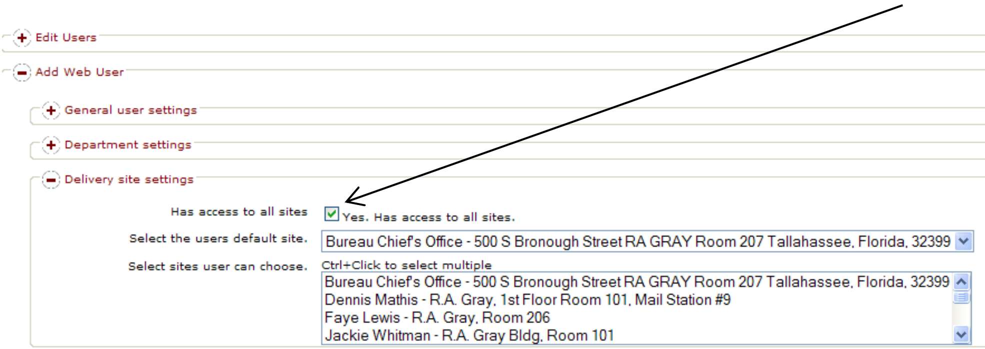
Receipt Report should not be checked.

Department Settings - If the agency account is departmentalized, the user can be assigned to all departments by checking "All Departments" or to individual departments by selecting the department.
For each user **"No Department Access" should be checked**. This gives users access to items that are not assigned to a department. The user's default department should also be selected. By doing so, all actions will be recorded under the user's default department unless the user manually selects another department.



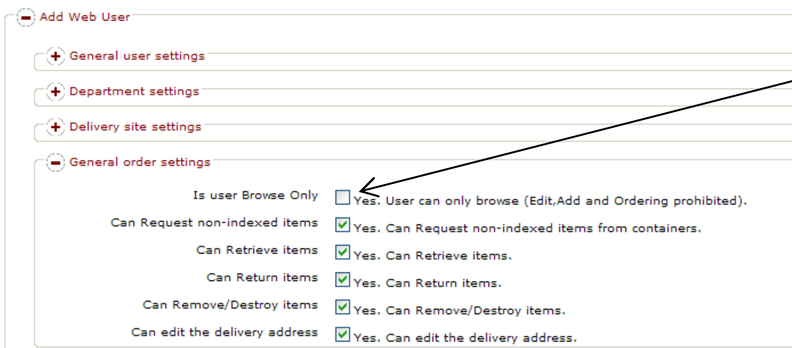
Access to All Departments: We recommend that an RMLO and their authorized backup have access to all departments. For other users, the RMLO should allow access only to the department(s) each user needs to perform his or her duties.
Multiple departments: By pressing the **<CTRL>** key and selecting, the user will be able to make multiple selections.

Delivery Site Settings – The RMLO should select the Delivery Site(s) to which the user needs access. To allow the user to have access to all sites, select the check box next to “Yes. Has Access to all Sites.”



Multiple Sites: By pressing the **<CTRL>** key and selecting, the user can make multiple selections.

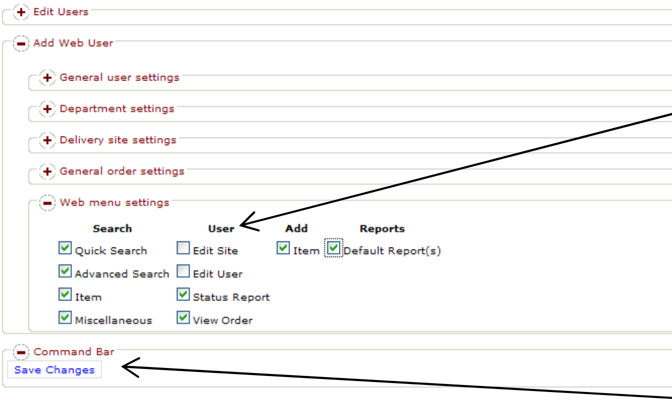
General Order Settings – The General Order Settings section is used to specify what actions a Web user can perform from the Total Recall SQL Web module.



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

Can Request Non-Indexed Items – gives the user the ability to index and request files from a box.
Can Retrieve Items – gives the user the ability to request boxes or files.
Can Return Items – gives the user the ability to refile boxes or files.
Can Remove/Destroy Items – gives the user the ability to permanently withdraw items.
Can Edit the Delivery Address – gives the user the ability to input data into the delivery address fields.

Web Menu Settings - The Web Menu Settings section is used to specify which menu options a Web user can access in the Total Recall SQL Web module. By selecting options in the Web Menu Settings section, menu options are visible for the Web user. By not selecting an option in this section, the corresponding menu option is hidden from the Web user. This would also restrict a user from being able to perform certain tasks.

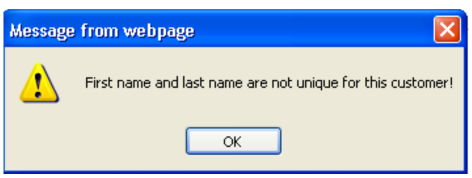


We recommend that only an RMLO and their designated backup have the ability to Edit a Site and Edit a User under the User Menu. Selecting these check boxes will give a user the ability to add and remove new sites and users without the RMLO's authorization.

Once all information for the new user has been entered or selected, click the **<Save Changes>** button in the command bar.

Note: The View Order(s) menu option ***MUST*** be turned on for a user to submit a work order for processing. If this option has not been enabled, the user will be able to add to an order but will not be able to submit the order. It is recommended that this option be turned on for all users who have Delivery, Pickup, Remove and/or Add permissions.

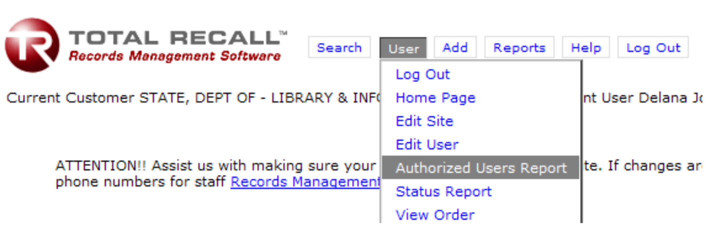
Note: Total Recall does not accept duplicated names or duplicated Web IDs. If the below errors are received, change the applicable information in the General User Setting Field and try again.



This message indicates a user with the same first and last name already exist for this account.

This message indicates the Web ID assigned to this user is already in use. The user will need to change the Web ID and click save changes.

Authorized Users Report – This report will provide an Authorized User with a listing of all users for the current account.

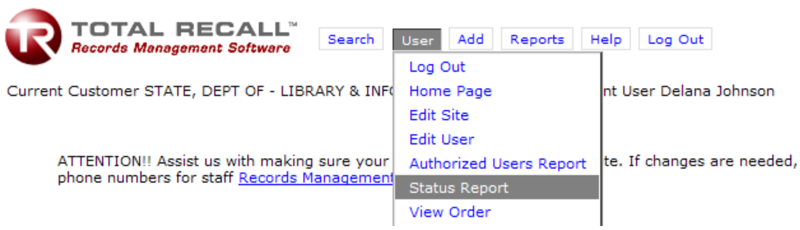


WARNING! Access to Authorized Users Report will contain contact and login information for all system users. Only RMLOs and their designated backups should have access to this report!

NOTE *In order to view the Authorized User Listing report from the Web, the client workstation must have a program capable of viewing files in PDF format, such as Adobe Reader, installed and operational.*

Status Report - The "Status Report" option shows agency orders sent to the Records Center, based on the date or work order parameters entered. It will also show the current status of the work order.

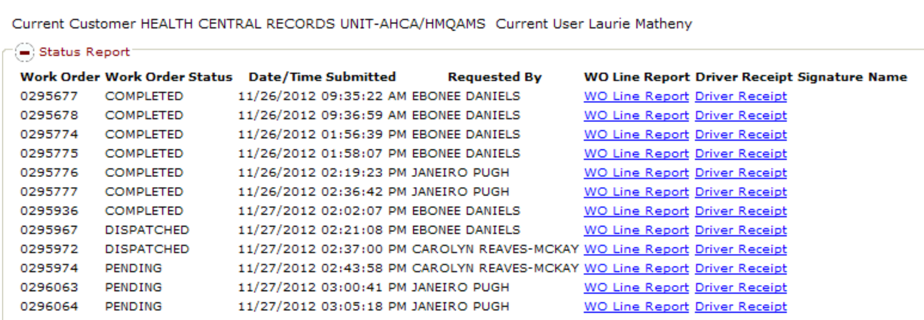
To view the status of work orders submitted, click on the <**Status Report**> in the User menu.



The Beginning Date defaults to the first day of the current month and the Ending Date must be entered or selected from the calendar. If looking for a particular work order, the date the work order was sent needs to fall within the date range entered. The user may also search by a work order number range. The work order number range may be placed in the Status Report by code field. Beginning Code will be the lowest or earliest work order number and Ending Code will be the highest or latest work order number.

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

The following Status Report will appear. It will show all work orders submitted for the user's agency that fall within the parameters specified on the previous screen.



Current Customer HEALTH CENTRAL RECORDS UNIT-AHCA/HMQAMS Current User Laurie Matheny

Status Report

Work Order	Work Order Status	Date/Time Submitted	Requested By	WO Line Report	Driver Receipt	Signature Name
0295677	COMPLETED	11/26/2012 09:35:22 AM	EBONEE DANIELS	WO Line Report	Driver Receipt	
0295678	COMPLETED	11/26/2012 09:36:59 AM	EBONEE DANIELS	WO Line Report	Driver Receipt	
0295774	COMPLETED	11/26/2012 01:56:39 PM	EBONEE DANIELS	WO Line Report	Driver Receipt	
0295775	COMPLETED	11/26/2012 01:58:07 PM	EBONEE DANIELS	WO Line Report	Driver Receipt	
0295776	COMPLETED	11/26/2012 02:19:23 PM	JANEIRO PUGH	WO Line Report	Driver Receipt	
0295777	COMPLETED	11/26/2012 02:36:42 PM	JANEIRO PUGH	WO Line Report	Driver Receipt	
0295936	COMPLETED	11/27/2012 02:02:07 PM	EBONEE DANIELS	WO Line Report	Driver Receipt	
0295967	DISPATCHED	11/27/2012 02:21:08 PM	EBONEE DANIELS	WO Line Report	Driver Receipt	
0295972	DISPATCHED	11/27/2012 02:37:00 PM	CAROLYN REAVES-MCKAY	WO Line Report	Driver Receipt	
0295974	PENDING	11/27/2012 02:43:58 PM	CAROLYN REAVES-MCKAY	WO Line Report	Driver Receipt	
0296063	PENDING	11/27/2012 03:00:41 PM	JANEIRO PUGH	WO Line Report	Driver Receipt	
0296064	PENDING	11/27/2012 03:05:18 PM	JANEIRO PUGH	WO Line Report	Driver Receipt	

Driver Receipt is not applicable and will be a blank report.

In the above example, the system shows the work order number, the work order status, date and time the order was submitted by the user, the user that requested the item(s), and a work order line report. If the user wants to see the items requested on a specific order, click on the <**WO Line Report**> and it will provide a detailed PDF report containing the items on the order.

Work Order Status shows the current status of the work order.

Web – Submitted from the Web Module but has not been viewed by Record Center Staff.
Printed – Order has been viewed by Records Center Staff but it not ready for scheduling.
Pending – Order is in process or is ready to be scheduled by Records Center Staff.
Dispatched – Order is completely processed and scheduled for pickup or delivery by Records Center Staff.
Completed – Order has been processed.

- Reference Request and Miscellaneous Orders – Items have been delivered.
- Refile and New Accession orders – Items have been picked up.

Billed – Order has been billed by the State Record Center.

Line Report for Work Order #0295972

Priority: REFR Due Date: 11/28/2012 12:00

Requested by: CAROLYN REAVES-MCKAY

WO Description: ATTENTION!! Assist us with making sure your contact information is accurate. If changes are needed, please contact your RMLO or one of our staff.

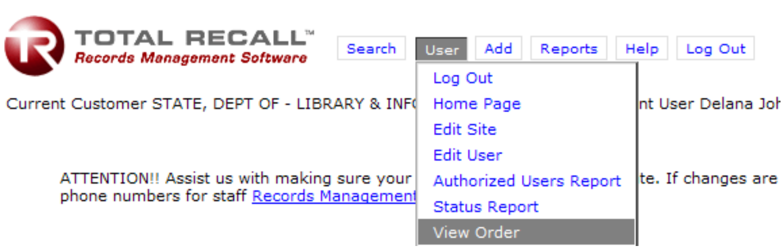
Item Code	Description	FILE ID	Work Order Number	Department	Service Description	Requested For	Parent Item Code	Parent Box #
F00000072392	[redacted]	2011-01022	0295972		Retrieve	CAROLYN REAVES-MCKAY	C00000383930	[redacted]
F00000072393	[redacted]	2009-20997	0295972		Retrieve	CAROLYN REAVES-MCKAY	C00000388947	[redacted]

In the above example, we can see that User Carolyn Reaves-McKay requested two files on Work Order Number 0295972. The work order line report for files will contain: the item code of the file; the Description and File ID the user entered on the initial index of the file; the Work Order Number; the Service Description (Retrieve, Refile, Remove or Add); the Parent Item Code (box the file is assigned to); and the Parent Box # field which contains the description provided when the box was accessioned.

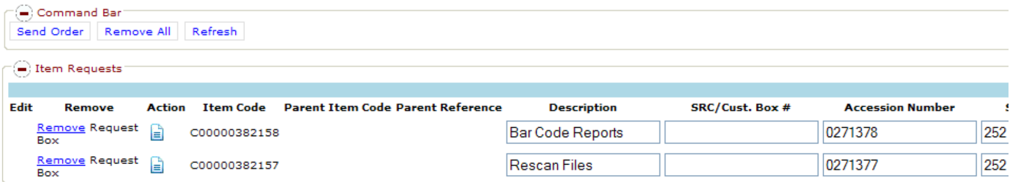
Note: The black boxes above conceal redacted information to protect client inventory information. The results displayed during this search will have data in these fields.

View Order – This option gives the user the ability to view all items they have added to an order but not submitted to the Records Center for processing. The View Order(s) menu option ***MUST*** be turned on for a user to submit a work order for processing. If this option has not been enabled, the user will be able to add to an order but will not be able to submit the order. We recommend that this option be turned on for all users who have Delivery, Pickup, Remove, and/or Add permissions.

To view the items on the current order, click on the **<View Order>** button on the User Menu.



From this screen, a user may remove items from their order or send their order. To remove items, click on the **<Remove>** button under the remove column. If the user is ready to submit the order, click on **<Send Order>** in the Command Bar.



Note: If the screen does not automatically display current results, the user will click the **<Refresh>** button in the command bar.

See Chapter 7 for more information on sending an order.

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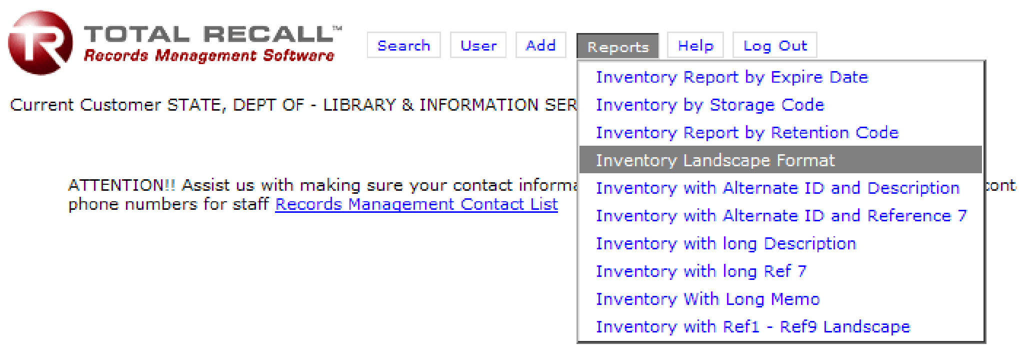
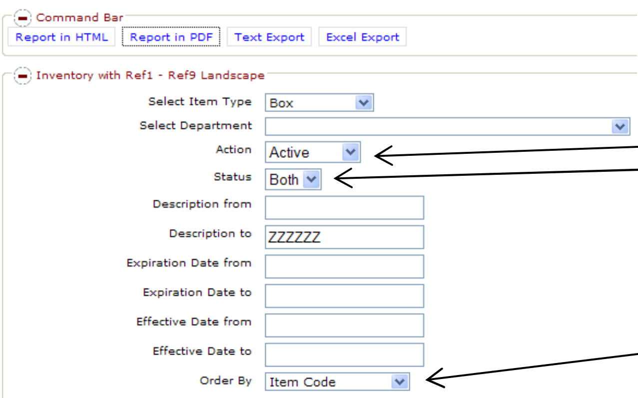
C H A P T E R 9 – The Reports Menu

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

Under the Reports menu, select the report titled “Inventory Landscape Format.”



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



The user can select various criteria to run the report, including:

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

Once the report criteria is entered, click either **<View Report in HTML>** or **<View Report in PDF>** in the command bar to view the report. The user can also export results into Excel format. For instructions on exporting, please refer to Chapter 2.

Inventory Landscape Format 3/8/2013

State, Dept of - Library & Information Services: State, Dept of - Library & Information Services

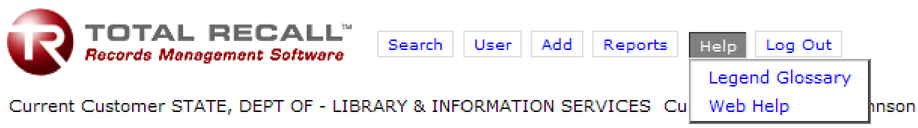
Item Code	Description	SRC/Cust. Box #	Accession Number	Effective Date	Expire Date	Department	Out	Date Out	Checked Out To
C00000141244	LSCA 76-77	Box 27 of 49	0065959		07/01/2012	04	No		
C00000141245	LSCA 76-77	Box 28 of 49	0065959		07/01/2012	04	No		
C00000141246	LSCA 1977	Box 29 of 49	0065959		07/01/2012	04	No		
C00000141247	LSCA 1974-1977 Administrative Files	Box 30 of 49	0065959		07/01/2012	04	No		
C00000141248	LSCA 1977	Box 31 of 49	0065959		07/01/2012	04	No		

Above is an example of the results for the Report in PDF format. On the last page of the report, the user will see a total number of items for that report. This particular report provides the user with the following information: the Item Code; the Description entered for the box when the box was accessioned; the SRC/Cust. Box #; the Accession Number; the Effective Date (the date the records were accessioned); the Expire Date of the box; the

Department the box is assigned to; whether or not the box is retrieved and if so, who checked it out; the date it was checked out; and the work order on which it was requested.

CHAPTER 10 – Help

There are two options under the Help menu: Legend Glossary and Web Help.



The Legend Glossary will provide the user with the meanings of various icons they may see while using the Total Recall Web Module.

= Add Non-Indexed Item
= Add Multiple Items to Parent
= Item History Report
= Image
= Attach Image

- Add Non-Indexed Item will add an index for a file in a box.
- Add Multiple Items to Parent will add and index for multiple files in a box.
- Item History Report will give a report on the history of a particular item, such as what user requested a box on a particular date and when the box was returned.
- Images are not utilized at this time.

Web Help will provide the following links: Total Recall Training Guide (this manual); Preparing Your Boxes for Transfer – Checklist & Guidelines; and the Records Storage (agency) Box Labels. Clicking the links will open a document in a new window.

Total Recall Help

- Total Recall Training Guide - (3.702MB PDF) Instructions for using Total Recall
- Preparing your boxes for transfer - Checklist & Guidelines - (101KB PDF)
- Records Storage Box Labels
  - 2 per page: WORD(60KB) or PDF(106KB)
  - 3 per page: WORD(73KB) or PDF(200KB)

For further assistance with Total Recall, please call 850-245-6750.

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APPENDIX A – GLOSSARY OF TERMS

ACCESSION NUMBER – Identifies a group of boxes sent for storage at the same time. For new accessions, the accession work order number becomes the accession number for the boxes.

CHILDREN – Refers to files previously indexed and requested from a particular parent box.

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

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

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

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

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

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

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

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

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

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

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

FLATS – "Flats" refer to flat boxes that come in bundles of 25; one (1) FLAT equals 25 boxes.

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

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

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

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

ITEM TYPE – Box or File.

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

PERMED OUT – Refers to the status of a particular item, meaning the item was permanently withdrawn or removed.

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

RECORDS STORAGE BOX LABEL – This label must be completed and placed on new boxes being accessioned into the Records Center. The current version of the label is available from our Web site at http://info.florida.gov/index_RecordsManagers.cfm (click "Publications and Forms" and then look under "Forms").

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

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

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

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

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

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

APPENDIX B – PREPARING RECORDS FOR TRANSFER

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

Storage Cartons:

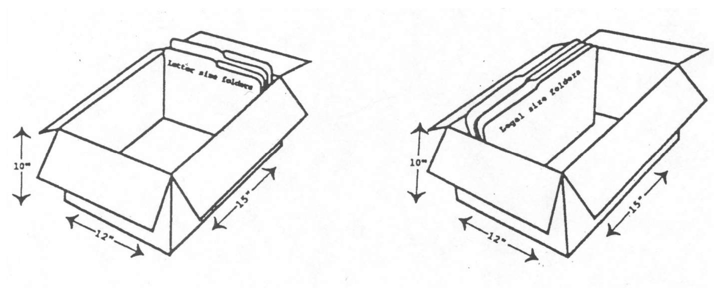
- Standard cartons may be ordered from the records center. The cartons come in bundles of 25 flat boxes. This is referred to as one flat.
- Standard cartons must have the following dimensions: 10 inches high by 12 inches wide by 15 inches long. They will hold up to one cubic foot of letter or legal size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

Preparing Cartons for Records:

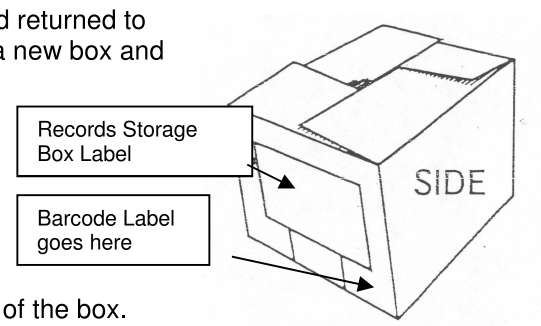
- Open the flattened box so that it forms a cube.
  - For the bottom, tuck short flaps in.
  - Fold long flaps over, completely covering the short flaps.
  - Tape along the seam where the two long flaps come together. Extend tape over each end approximately 1½ inches. Use 2”-3” wide, clear, plastic,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

Packing:

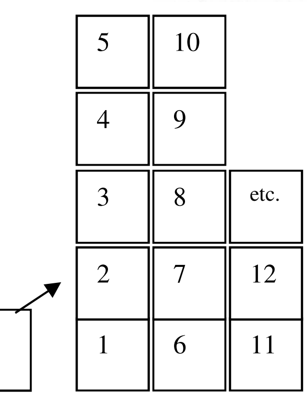
- Pack only one record series per box.
- Keep files in their original folders. Do not put loose paper in the box. All papers must be in folders.
- Keep filing order intact. If there is no logical order that can be used for retrieving files, the records must be put in order before packing boxes. Records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



When packing is complete:



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



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

Accession Box Checklist

Please use the checklist below to be sure your boxes are properly prepared for pickup. This will ensure that your pickup is not delayed. If you have questions about any of the items listed or need assistance, please call our Scheduling Coordinator Jason Shirah or our Records Storage Supervisor Delana Johnson at 245-6750 (Option 4). ***<u>Please see reverse side for more detailed guidelines.</u>***

Records Storage Cartons:

- ☐ Standard size (10"x12"x15") without lids
- ☐ New or in good condition
- ☐ Bottom secured along seam with 2"-3" wide commercial packing tape

Records Storage Box Labels:

- ☐ On the front of the box (12" side)
- ☐ Taped on all four sides of the label with 2" – 3" wide commercial packing tape
- ☐ Includes Retention Schedule Number, Item Number, and Record Series Title, all matching the Work Order
- ☐ "From Date" contains a month and a year
- ☐ "To Date" contains a month and a year
- ☐ "To Date" is <u>not later than</u> the "To Date" on the accession Work Order

Barcode Labels:

- ☐ On the lower portion of the front of the box (12" side)
- ☐ Not overlapping the records storage box label

Stacking For Pickup:

- ☐ All boxes on the accession work order are stacked in one location in barcode number order.
- ☐ If there are multiple work orders, boxes are stacked separately for each work order.

APPENDIX C – RECORDS STORAGE BOX LABELS

A Records Storage Box Label must be completed and placed on new boxes being sent to the Records Center for storage. The current version of the label is available from our website at http://info.florida.gov/index_RecordsManagers.cfm (click “Publications and Forms” and then look under “Forms”).

2 Per Page Records Storage (Agency) Box Label

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

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

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

Records Storage Box Label

3 Per Page Records Storage (Agency) Box Label

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

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

STATE OF FLORIDA
DEPARTMENT OF STATE
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Information Services
Form LS5E200 R 09-2004

Records Storage Box Label

APPENDIX D – BOX INFORMATION IN TOTAL RECALL

Sample Box Descriptions: Correspondence Files

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

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

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

Box 1	Correspondence With State Agencies
Box 2	Correspondence With Vendors
Box 3	Routine Public Inquiry Correspondence
Box 4	Public Records Request Correspondence

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

Sample Box Descriptions: Grant Files

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

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

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

Terms/Phrases to Avoid in Box Descriptions:

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

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

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

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

- General schedule item titles that do not indicate record content

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

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

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

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

WHY?

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

Entering Dates for Boxes:

- From date => **EARLIEST** date of records contained in the box
- To date => **LATEST** date of records contained in the box
    - Follow this guideline even if records in box are filed in reverse chronological order.

WHY?

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

Entering Retention Schedule Numbers and Titles:

1) If using a general records schedule, make sure you are using a current, valid schedule number and item number. See our Web site at http://info.florida.gov/index_RecordsManagers.cfm for current general records schedules and recent updates.

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

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

- For instance, ***do not*** use: "Projects"
    - Instead, use: "Project Files: Capital Improvement"
- Do not use: "Accounts"
    - Instead, use: "Receipt/Revenue Records: Detail"