

Overview

Total Recall Envision Client Web application is a faster, smarter client web interface for customers to use when managing vault inventory and requesting delivery and pickup services. The Vault Management features will permit users to manage vault items by creating work orders for adding, returning and retrieving items as well as for verification of inbound/outbound orders and updating inventory. This Quick Reference Guide will walk through how to utilize these valuable features.





Vault Management

After logging into FileBRIDGE Records, customers can access the *Vault Management* menu option or **<Vault Management>** button right on the Home page (Fig. 1).

ome Search - Add	Pick Up Request	Service / Materi	al Vault Management Se	ervice Bin Reports 🗸 Admir	n ← Help
All - Search Value					
Welcome to FileLineACCESS,	your Online Informatio	n Management res	ource!		
	mer Service at 1 877 File	Line with any ques	stions or concerns you may have.		
We will be glad to help. To learn more about Access					
To rearrant about Access	services please visit ww	w.informationprot	tected.com		
Search		dd	Pick Up Request	Service / Material	Vault Manageme
				Service / Material	Vault Manageme



This will display the Vault Management menu screen (Fig. 2).

Home	Search +	Add	Pick Up Request	Service / Material	Vault N
Send	d OffSite				
Send I	dedia offsite via		scan, copy and paste, o	r import process.	
Retr	ieve From	Offsite			
Reque	st media from o	Contract of the second	manual, scan, copy and	paste, or import process	i.
Veri	fy In/Out				
Scan n	edia to verify in		outbound orders.		
	ate Items				
	0	0			
Updat	e single or multi	iple items	via manual, scan, copy	and paste, or import pro	cess.



The Vault Management menu screen is used to send vault inventory offsite to the vault facility (used for adding new items or returning existing items in inventory), request delivery of vault items from the facility, verify work order line items returned from the vault facility or going out to the facility for storage as well as updating existing items in inventory.

Use the dropdown menu at the top right corner, below the logged in user name, to select the appropriate account for which the vault inventory should be managed in the current web session, if applicable (Fig. 3).



FileBRIDGE Records User Guide

Vault Management





Fig. 3





Send Items Offsite

The **<Send Offsite>** button is used to refile existing inventory items or to add new items to inventory (Fig. 4).



Fig. 4

The Send Offsite screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility (Fig. 5).

FileBRIDGE [®] records.				All Customers	Hello MATT HERRON V Log Out
Home Search - Add Pick Up Request Service	e / Material Vault Management	Service Bin Reports -	Admin 🗸 Help		
Home / Vault Management / Send Items					
Search Options Divide Column Customer MY/NUPA-NYMerro ZZZNYNA-ACCESS DEMO/TEST ACCOUNT - V	Enter Field Values				Process
Department All V Item Types BOX V					
Select Key Reference Field Access Barcode #					



Send Offsite: Single-Column Mode Search

The simplest way to build a list of items to be sent to the offsite storage facility is to enter the Search Options at the left, set a default Expire Date for the vault items to be sent to the storage facility (to determine the date on which the tapes should be returned, if applicable) and enter the VOLSER numbers in the box provided. VOLSERs can be typed or scanned with a keyboard wedge scanner, as needed.

Use the **Search Options** section at the left to define the following search parameters for processing the current Send Offsite request:

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.





Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Select Key Reference Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier.

Yes, input is by scanning – Put a check in this box to indicate that barcodes will be scanned using a keyboard wedge scanner to create the list of inventory to be processed.

In the **Enter Field Values** section a right, use the calendar to set an appropriate Expiration Date by clicking on the date field (Fig. 6).

Enter Fie	eld \	/alu	es				
Expire Date	I						
	0		Ju	ly 201	6		0
	Su	Мо	Tu	We	Th	Fr	Sa
						1	2
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31						



Please Note: Date formats in the system are defined at the vault management facility. A default Expiration Date can also be set at the vault management facility, as needed.

Use the box provided to enter a list of inventory to be sent to the offsite vault management facility (Fig. 7).

Enter Field	Values
Expire Date	12/31/2199
Z40123	
Z40214	
Z40125	
TC0251	
TC3033	
TC8525	
LTO660	
LTO661	
LTO662	

Fig. 7

The list of items can either be manually typed in or scanned with a keyboard wedge scanner by using the **Yes, input is by scanning** option in the Search Options at the left. **Single-Column Mode – Import from File**





Import from file

Instead of typing a list of items to be sent offsite to the vault management facility, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 8).

File				-	1
V:\dispate	:h.txt			Browse	
File Type	Se	parator			
Delimited	File 🗸	Comma	\checkmark		
Column	Header Skip	Footer S	kip		
А	0	0		Upload	

Fig. 8

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either *Comma*, *Tab*, or *Pipe*, as needed.

Column – Indicate the column in the data file in which the key reference field is located.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the <Upload> button to import the data file and display the results in the search list.

Send Offsite: Multi-Column Mode Search

The Mufti-Column option in the Search Options section of the Send Offsite process enables the use a list of line items containing multiple columns. Line items can be typed directly in to the list box provided, copied from a source data file and pasted into the list box or imported from a text file data source. To enable multi-column mode, put a check in the *Multi-Column* box at the top of the Search Options section (Fig. 9).





FileBRIDGE [®] records.						
Home Search 🗸 Add Pick Up Reques	t Service / Material	Vault Management	Service Bin	Reports 🗸	Admin 🗸	Help
Home / Vault Management / Send Items						
Search Options	Enter F Expire Dat	e la values				
Customer NY/NJ/PA-NYMetro.ZZZNYM.ACCESS DEMO/TEST ACC						
Department All						
Item Types TAPE						
Select Key Reference Field						
Retrievex Barcode #						
Import from file Clear						

Fig. 9

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Line items can be typed, pasted or imported into the list box accordingly (Fig. 10).

Enter Field Val	ues		
Column Separator	Comma 💟	Setup Field Values	
1,Z40215,APRIL	2015,10/02/201	5,04/01/2015,04/02/2015	T320-99PE,00000000000000000000000000000000000
2,TC0252,APRIL	2015,10/02/201	5,04/01/2015,04/02/2015	T310-47PE,000000000000000000000000000000000000
3,TC3034,APRIL	2015,10/02/201	5,04/01/2015,04/02/2015	T320-16PE,000000000000000000000000000000000000
4,TC8526,APRIL	2015,10/02/201	5,04/01/2015,04/02/2015	,T300-26PE,000000000000000000000000000000000000
5,LTO664,APRIL	2015,10/02/201	5,04/01/2015,04/02/2015	,T320-55PE,0000000000000000000000000000
6,LTO663,APRIL	2015,10/02/201	5,04/01/2015,04/02/2015	,T310-43PE,000000000000000000000000000
7.LTO661.APRIL	2015.10/02/201	5.04/01/2015.04/02/2015	T310-34PE,000000000000000000000000000000000000

Fig. 10

The Enter Field Values section contains to determine the column separator found in each line item and the provided interface for defining the field values/column mapping (Fig. 11).

Enter Field Va	alues		
Column Separator	Comma	~	Setup Field Values

Fig. 11

Column Separator – Use the dropdown menu provide to select the appropriate column separator character for the line item. Select either *Comma*, *Tab*, or *Pipe* as needed.





Setup Field Values

The **Setup Field Values**> button is used to map the column in each line item with relevant reference information for the new or existing item in inventory (Fig. 12).

Setup Field	d Values		
Go to record 1	×		
Key Field	Column Data	Field Name	
	Test	Access Barcode #	~
	Test	Box Description	~

Fig. 12

Go to Record – Use the box provided to scroll though the line items, as needed. The Column Data field will display the text value for each column found in the selected line item accordingly.

Key Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier. The Key field is automatically selected when Item Code or VOLSER (Reference 1) is selected. Only one (1) column per line can be marked as the Key Field at a time, but a Key field **must** be defined.

Column Data – Displayed the text date in the column for the line selected.

Field Name – Use the dropdown field provided to select the appropriate reference field available for the item type. Any/all data found in this column for each line item will be mapped to the selected reference field.

Date Format – if the Field Name selected is a date filed in the system, select the appropriate date format build in the system for this date field.

For any column that should *not* be used during the search process at this time, select the *Ignore* option when defining the Field Name.

Multi-Column Mode – Import from File

Import from file

Use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 13).





V:\dispatch	.txt		Browse
ile Type	Sep	arator	
Delimited Fi	ile 🔽 🤇	Comma 🗸 🗸	
Tolumn	Header Skip	Footer Skip	
A	0	0	Upload



Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either *Comma*, *Tab*, *Pipe* or define a *Custom* delimiter, as needed.

Column – Leave this value blank to import all columns in the data file; or enter a value in the field provided to define only the single column to be imported from the data file at this time.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.





Request From Offsite

The **<Request from Offsite>** button is used to request the delivery of existing inventory items from the vault management facility (Fig. 14).

Retrieve From Offsite
Request media from offsite via manual, scan, copy and paste, or import process.

Fig. 14

The Request Items screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility (Fig. 15).

FileBRIDGE [®] records.				Hello MATT HERR	ON - Log Out
records.				tter	ms On Order (18)
Home Search - Add Pick Up Request Service	/ Material Vault Management Se	iervice Bin Reports 🗸 /	Admin v Help		
Home / Vault Management / Request Items					
Search Options	Enter Search Values				Process
Customer NY/NJ/PA-NYMetro.ZZZNYM.ACCESS DEMO/TEST ACCOUNT -					
Department					
All					
Item Types					
BOX					
Select Key Reference Field					
Access Barcode #					
Import from file Clear					

Fig. 15

Use the **Search Options** section at the left to define the following search parameters for processing the current request.

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Select Key Reference Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier.

Yes, input is by scanning – Put a check in this box to indicate that barcodes will be scanned using a keyboard wedge scanner to create the list of inventory to be processed.





Use the box provided to enter a list of inventory to be requested from the offsite vault management facility (Fig. 16).

Enter Search Values	
13251468 16518181 48465181 51484967 51681354	

Fig. 16

The list of items can either be manually typed in or scanned with a keyboard wedge scanner by using the **Yes**, **input is by scanning** option in the Search Options at the left.

Request from Offsite – Import from File

Import from file

Instead of typing a list of items to be sent offsite to the vault management facility, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 17).

V:\dispatch	.txt		Browse
ile Type	Sep	arator	
Delimited F	ile 🗸 🕻	iomma 🛛	\sim
Tolumn	Header Skip	Footer Skip	
A	0	0	Upload

Fig. 17

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provide to select the appropriate column separator character for the data file selected. Select either *Comma*, *Tab*, or *Pipe*, as needed.

Column – Indicate the column in the data file in which the key reference field is located.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.





Send / Request Search Results

Process

After building the list of items to be processed, press the **<Process>** button in the top right corner to continue with the Send Offsite / Request from Offsite order. This will display the Search Results page (Fig. 18).

FileBRIDG records.	Hello MATT HERRON All Customers	s On Order (2)		
Home Search - Add Pick U	lp Request Service / Materia	I Vault Management 🗸	v Reports → Admin → Help	
Status Check Out(2) Switch to another account VI Merro/Del Val (2) Customer IZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO (2) Department 103.ZZZNYM - INSURANCE (2) Item Type BOX (2)	Showing 1 - 2 of 2		ZZZNYM: ACCESS DEMO/TEST ACCOUNT - NY METRO	Send Order
		Remove	Access Barcode #: N00048345 Switch to another account: NY Metro/Del Val Customer: 2222NYMACCESS DMOTCST ACCOUNT - NY METRO Department: 103-222NYM - INSURANCE Alternate Box #: B4 Sequence Beglin: N Sequence End: Z Box Description: CLAIMS - CLOSED AUTO From Date: 1/1/2006 To Date: 123/12006 Retention: INSUG - LCAIMS - LCOSED AUTO	
	Ē	Remove	Access Barcode #: N00081114 Switch to another account: NY Merro/Del Val Customer: ZZZNYMACCESS DEMO/TEST ACCOUNT - NY METRO Department: 103.ZZZNYM - INSURANCE Alternate Box #: B4 Sequence Beglin: N Sequence End: Z Box Description: CLAIMS - CLOSED MINOR Effective Date: 3/ From Date: 1/1/2004 To Date: 12/31/2004 Retention: IND03 - CLAIMS - CLOSED MINOR	

Fig. 18

Use the search results page to verify the actions expected to be performed when sending items offsite to the vault management facility (items to be added to inventory, existing items to be refiled, etc.).

If any changes need to be applied to the original item search, use the menu above the search results to navigate the Envision Client Web application back to the previous step instead of using the **<Back>** button in the internet browser (Fig. 19).



Fig. 19

Please Note: The Send Offsite feature of the Envision Client Web application is designed to search for and locate **exact** matches for existing items in inventory using the search criteria entered. If an exact match is not found, the Send Offsite feature is designed to add the new item to inventory. Please review the Search Results carefully before continuing through the Send Offsite process.

The menu at the left of the results screen can be used to apply filters to the results to select inventory from a combination of requested activity (Refile/Add), customer account, department (if applicable), item types, *etc.* (Fig. 20).





Status	
Check Out (2)	
Switch to another account	
NY Metro/Del Val (2)	
Customer	
ZZZNYM ACCESS DEMO/TEST	
ACCOUNT - NY METRO (2)	
Department	
103.ZZZNYM - INSURANCE (2)	
Item Type	
BOX (2)	

Fig. 20

Select which filters to apply or remove by clicking on the box at the left to check or uncheck the filter, respectively.

Global Edit – If permissions to the Envision Client Web application allow, use the Global Edit option to update all items of an Item Type with the same reference field, description and/or date values, as needed (Fig. 21).

Global Edit			
Type BOX	Customer NY/NJ/PA-NYMetro-ZZZNYM-ACCESS DEMO/TEST ACCO	18 Item(s) will be affected	^
Department	Alternate Box	*	
Sequence Begin	Sequence En	3	
Box Description	Eligible		
From Date	To Date		
Long Description			
Indexed Notes			
Edit Cart Information			
Requested For	Browse		
Comments			~
			Save Close

Fig. 21

The Global Edit screen will display all the available reference fields and date fields that are editable for that Item Type in the Envision Client Web application. Put a check in the box next to the name of the field to be edited, then enter the value for that field to be applied to all items of the type indicated. Shopping cart information, such as the name of the individual who is requesting the action (Requested For) as well as any relevant notes for each item (Comments).

Press the **Save**> button to update all items of this type with the information entered on the Global Edit screen and return to the Search Results list. Pressing **Close**> will exit the Global Edit screen without saving any changes to the items in the Search Results screen at this time.

The action menu provided for each line item in the Search Results screen can be used to provide current inventory information, requested action description, requestor name and an option to remove the line item from the search results (Fig. 22).







Fig. 22

Remove – Use the Remove option to remove the line item from the search results. This item, if removed from the list, will not be processed further.





Submitting the Web Order

Add Results to Cart

Add Results to Cart. Once all line items in the list have been verified, use the **Add Results to Cart**> button to add all the results listed in the Search Results screen to the shopping cart at this time.

The shopping cart will display all web order line items that have not been submitted to the records center at this time, including all previous delivery, pickup, add and any other service requests (Fig. 23).

FileBRIDG records.	8		Hello M All Customers	ATT HERRON Log Out
	lp Request Service / Materia	al Vault Management 🕯	• Reports • Admin • Help	
Status Check Out (2) Switch to another account	Showing 1 - 2 of 2		ZZZNYM: ACCESS DEMO/TEST ACCOUNT	NY METRO Send Order
UNY Metro/Del Val (2) Customer IZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO (2) Department D103.ZZZNYM - INSURANCE (2)	Ē	Remove Remove Remove Rected Rected Check Out for MATT HERRON	Sequence Begin: N Sequence End: Z	VY METRO te Box #: B400254 ive Date: 1/24/2009
Item Type ☐ BOX (2)		Remove Remove	Sequence Begin: N Sequence End: Z	VY METRO te Box #: B400299 tive Date: 3/20/2009

Fig. 23

The menu at the left can be used to apply filters to the shopping cart to further processing of web order lines using a combination of line status (Add, Retrieve, Refile, *etc.*), customers, departments, item types, *etc.* (Fig. 24).

Status	
Check (Dut (2)
Switch to	another account
NY Met	ro/Del Val (2)
Customer	
ZZZNYN	ACCESS DEMO/TEST
ACCOUNT	- NY METRO (2)
Departme	ent
🗆 103.ZZZ	NYM - INSURANCE (2)
Item Type	
BOX (2)	

Fig. 24

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 25).





Remove
☑ selected
Check Out for MATT HERRON



PLEASE NOTE: Permissions granted to the web user, the settings for the item type in inventory and the inventory status will determine which actions are available in the action menu for any record in the search results.

Remove – Click on this option to remove the single item from the shopping cart at this time.

Edit Item – Press this button to edit the available reference fields, notes and/or dates for the item in inventory, as needed. The Edit Item screen will be displayed (Fig. 26).

Edit			
Item Code	Department		
F0006529975	103.ZZZNYM - INSURANCE		
Claim Number		Name	
1358476		SMITH	
Policy Type			
AUTO	\checkmark		
Edit Cart Information Requested for MATT HERRON Comments			Save Close

Fig. 26

Press the **Save**> button to update the item's reference field data and any other relevant information available to be edited for this item. The Edit Item screen will be closed after saving. Press the **Close**> button at any time to discard any changes made to the item and return to the search results without changing any information.

Use the **<Remove All>** button to remove all listed items from the shopping cart, if needed (Fig. 27).









Once the shopping cart has been reviewed and all line items are confirmed for action, use the **<Send Order>** button at the right to submit the web order to the records center (Fig. 28).

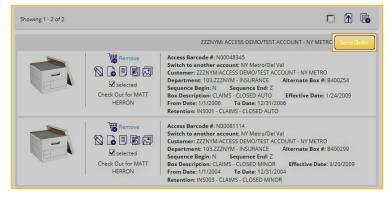


Fig. 28

The Send Order screen will appear (Fig. 29).

Default Delivery Address	25 HOME NEWS ROW
Select Delivery Address	Address
Select Delivery Address	NEW BRUNSWICK
Building/Floor/Room/Suite/Dept	City
NJ	08901
State	Zip
Order Information	
Customer Order Reference	Select Delivery Priority
Delivery Date	Charge to Department

Fig. 29





Select or set the appropriate delivery/pickup address, additional order information, the delivery priority to determine the service date and any comments relevant for this order that the records center should be made aware.

Press the **<Send>** button to submit the web order at this time.

If necessary to send the web order at a later date, press the **<Cancel>** button instead to cancel the send order request and return to the shopping cart. No order will be sent at this time.

The web order confirmation screen will be displayed with the summary of the submitted order, which can be printed or exported to PDF, Image, Word, Excel or HTML format (Fig. 30).

		DGE®					All Custome		TT HERRON -	Log O
	record	ls.					All Costoring	Items Or	tems On Order (0	
Home Sea	arch + Add	Pick Up Reques	t Service / Mater	ial Vault	Management -	Reports 🗸	Admin -	Help		
Customer ZZZN	YM: ACCESS DEN	IO/TEST ACCOUNT - N	Y METRO							
							PDF		~	Report
7/19/2016 6:24 AM			OnS	ite Batch	Detail					
6:24 AM			ACCESS DEMO/	TESTACC		TRO				
			ACCECC DEMO	LUTACO		into				
Customer:	777NVM -	ACCESS DEMOTEST	ACCOUNT - NY METRI							
Phone:	LLL NIM -	100200 020001201		Number	and and and a	MATT HERRO	IN			
Address:	25 HOME M	WWS ROW	Batch		ested Date/Time::	7/19/2016 6:24	AM			
	NEW BRUN	SWICK, NJ 08901		Due I	Date:					
Notes:										
Requested Fo	r: MATT HERRO	N								
Item Type: BO	x									
Access Barcode #	Parent Code	Alternate Box #	Reference 2	Sequence Begin	Sequence End	Action		Location		
N00048345		B400254		N	Z	Check In				
N00081114		B400299		N	Z	Check In				
	Customer Pri	nt		Customer Si	gnature			Date/Time		
					1.100 0.100					

Fig. 30





Verify In/Out

The **<Verify In/Out>** button is used for verifying inventory items recently received from the offsite vault management facility as well as for verifying items to be sent offsite to the vault management facility (Fig. 31).





The Request Items screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility (Fig. 32).

Search Options	
Verify (Inbound / Outbound)	
Verify Outbound	•
Customer	
NY/NJ/PA-NYMetro.ZZZNYM.ACCESS DEMO/TEST ACCOUNT -	-
Department	
All	-
Work Order	
5649101	-
Select Key Reference Field	
Item Code	-
Import from file Clear	

Fig. 32

The Request Items screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility.

Use the **Search Options** section at the left to define the following search parameters for processing the current Send Offsite request:

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.





Select Key Reference Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier.

Yes, input is by scanning – Put a check in this box to indicate that barcodes will be scanned using a keyboard wedge scanner to create the list of inventory to be processed.

Use the box provided to enter a list of inventory to be requested from the offsite vault management facility (Fig. 33).

Enter Search Values				
13251468 16518181 48465181 51484967 51681354				

Fig. 33

The list of items can either be manually typed in or scanned with a keyboard wedge scanner by using the **Yes**, **input is by scanning** option in the Search Options at the left.

Verify – Import from File

Import from file

Instead of typing a list of items to be verified, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 34).

Import File	
File	
V:\dispatch.txt	Browse
File Type Separator	
Delimited File 🔽 Comma 🗸	
Column Header Skip Footer Skip	
A 0 0	Upload
	Close



Browse - Press the <Browse> button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either *Comma*, *Tab*, or *Pipe*, as needed.

Column – Indicate the column in the data file in which the key reference field is located.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).





Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.

Verify Results

After building the list of items to be verified, press the **Process**> button in the top right corner to continue with the Verify request. This will display the Verify Report screen (Fig. 35).

\checkmark
Print Close



The web order confirmation screen will be displayed with the summary of the submitted order, which can be printed or exported to PDF, Image, Word, Excel or HTML format (Fig. 36).

7/22/2016				10:08 AM		
Verify Outbound Report						
Access/Northeast: NY/NJ/PA-New York Metro						
Item Previously Scanned: 0						
		Successfully Scanned	I: 0			
		Item not Scanned:	1			
		Not On Work Order:	3			
	ltem Code	Search Value	Message			
	F0010285704	F0010285704	Item not Scanned			
		F0006529975	Not On Work Order			
		F0006529976	Not On Work Order			
		F0006529977	Not On Work Order			

Fig. 36

The Verify Report will list all items typed, scanned, pasted or otherwise listed in the Field Values section of the Verify screen and indicate which items were **Successfully Scanned** (*i.e.* included on the verify screen and found on the work order), and report **Items not Scanned** (*i.e.* listed on the work order but not included on the Verify screen) as well as any items **Not on Work Order** (included in the verify list, but not on the original work order).





Update Items

The **<Update Items>** button is used for updating existing inventory in the system. Dates, descriptions and other reference field values (accessible on the web) can be updated on this screen (Fig. 37).

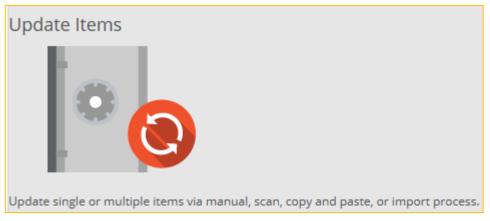


Fig. 37

Use the **Search Options** section at the felt to define the following search parameters for processing the current Send Offsite request (Fig. 38).

Fil	FileBRIDGE [®] records.									
Home	Search 👻	Add	Pick Up Request	Service	/ Material	Vault Management	Service Bin	Reports 👻	Admin 👻	Help
Home /	Vault Managem	nent / Up	odate Items							
Search (Customer NY/NJ/PA	•	IYM.ACCE	55 DEMO/TEST ACCOUN	IT - 🔽	Enter F	eparator Comma 💌	Setup Field Valu	es		
Department				~						
Item Types BOX				~						
Import fro	om file Cle	ar								

Fig. 38

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Use the box provided to enter a list of inventory to be updated. The list of items can either be manually typed in or copied from a source text file and pasted into the field.





Update – Import from File

Import from file

File> button in the Search Options section to open the Import From File screen (Fig. 39).

Import File				
File V:\dispate				Browse
File Type		parator		browse
Delimited	File 🔽	Comma	~	
Column A	Header Skip	Footer	Skip	Upload
				Close

Fig. 39

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either *Comma*, *Tab*, or *Pipe*, as needed.

Column – If only one (1) field should be imported from the source data file, indicate the column in which the key reference field is located. Only the column indicated will be imported. Leave this column blank to import all columns.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.

Setting Field Values

Once the data has been typed, pasted, imported or otherwise entered into the box provided, the field values can be defined to determine which reference fields should be updated and which columns in the source data should be ignored accordingly (Fig. 40).

Enter Field Values						
Column Separator	Comma	~	Setup Field Values			
F0006529975,TEST,DEMO F0006529976,TEST2,DEMO2 F0006529975,TEST3,DEMO3						





Fig. 40

The Enter Field Values section contains the column separator found in each line item and the provided interface for defining the field values/column mapping (Fig. 41).

Enter Field Values						
Column Separator	Setup Field Values					
L						



Column Separator – Use the dropdown menu provided to select the appropriate column separator character for the line item. Select either **Comma**, **Tab**, or **Pipe** as needed.

Setup Field Values

The **Setup Field Values**> button is used to map the column in each line item with relevant reference information for the new or existing item in inventory (Fig. 42).

Setup Field Values						
Go to record 1						
Key Field	Column Data	Field Name				
	F0006529975	Ignore	~			
	TEST	Ignore	~			
	DEMO	Ignore	~			

Fig. 42

Go to Record – Use the box provided to scroll through the line items, as needed. The Column Data field will display the text value for each column found in the selected line item accordingly.

Key Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier. The Key field is automatically selected when Item Code or VOLSER (Reference 1) is selected. Only one (1) column per line can be marked as the Key Field at a time, but a Key field **must** be defined.

Column Data - Displays the text date in the column for the line selected.

Field Name – Use the dropdown field provided to select the appropriate reference field available for the item type. Any/all data found in this column for each line item will be mapped to the selected reference field.

Date Format – If the Field Name selected is a date field in the system, select the appropriate date format build in the system for this date field.

For any column that should not be used during the search process at this time, select the Ignore





option when defining the Field Name.

Update Search Results

Process

After building the list of items to be updated, press the **Process**> button in the top right corner to continue with the item update order. This will display the Search Results page (Fig. 43).

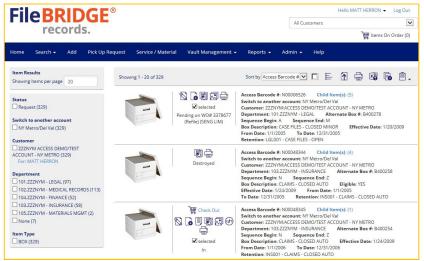


Fig. 43

Use the search results page to verify the values expected to be updated.

The search results screen can be used just like the Send Offsite / Request from Offsite search results screen to edit items, remove items from the list and perform global updates, if applicable.

Process List Use the **<Process List>** button to update all the results listed in the Search Results

screen.

