

Overview

TCIM E-Request puts the power of our innovative records management software in your hands. With TCIM E-Request, you can place orders for pick up or delivery, run queries, print reports and even track the status of your orders.

This Quick Reference Guide covers each menu option available to Users. Day-to-day operations, such as requesting deliveries, adding containers, and viewing reports queries, are detailed with applicable screen shots to get you up and running in no time.

Log In Screen

The User must log on, using the User ID and Password, assigned by TCIM. Fig. 1 displays a sample Security Control Form / Log On Screen. An unsuccessful Log-In will create a system message: **User ID or Password Invalid!**

Log-in Screen

The screenshot shows the 'Security Control Form' for Total Recall Records Management Software. At the top left is the logo with the text 'TOTAL RECALL™ Records Management Software'. To the right is a small image of two people working at a computer. The main area contains the title 'Security Control Form' and two input fields: 'User ID' and 'Password'. Below these fields are two buttons: 'Log In' and 'Clear'. A mouse cursor is pointing at the 'Log In' button.

Fig. 1

If Login is successful, the Menu bar, similar to Fig. 2, will display identifying the **Current User** and their associated organization, displayed as **Customer**.

Menu Options

The screenshot shows the 'Menu Options' for Total Recall Records Management Software. At the top left is the logo with the text 'TOTAL RECALL™ Records Management Software'. To the right is a small image of two people working at a computer. Below the logo is a horizontal menu bar with the following options: 'REQUEST', 'QUERY', 'USER', 'ADD', 'REPORTS'. Below the menu bar, the current user and customer information is displayed: 'Customer: CCM001', 'Current User: JOHN BROWN', and 'Request - Rapid Order'.

Fig. 2

Request

The first menu is the **Request** menu. It contains the options for identifying and placing items on the list as a submission to a work order.

Query

The **Query** menu allows the user to search for items. Queries can look up items such as boxes or files.

LIMITATIONS OF WARRANTY AND LIABILITY

DHS Associates, Inc. makes no warranty, expressed or implied, with respect to this bulletin or its contents, its quality, performance, merchantability, or fitness for any particular purpose or use. It is solely the responsibility of the user to determine its suitability for a particular purpose or use. DHS Associates, Inc., will in no event be liable for direct, indirect, incidental, or consequential damages resulting from any defect or omission. This statement of limited liability is in lieu of all other warranties or guarantees, expressed or implied, including warranties of merchantability and fitness for a particular purpose.

User The **User** menu contains options pertaining to the Access User, Customer, current and past work orders, as well as the **Log Out** function.

Add The **Add** menu allows the user to add containers and indexed items.

Reports The **Reports** menu contains options representing the different reports provided by the TCIM E-Request Program.

Log Out

When all tasks are complete, the User should Log Out of TCIM E-Request. From the **User** menu, select **Log Out**. The User's session will be closed and the Security Control Form / Log In screen will display. Any items currently active, and yet to be processed or sent are kept in Pending, and await the Users return. It should be noted that these are only pending item request, which do not affect the status or disposition of any inventory at TCIM.

Log Out

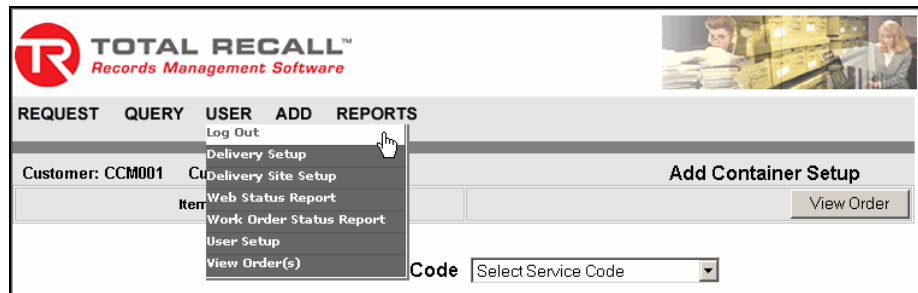


Fig. 3

Delivery Setup

Delivery/Address Setup is the first screen a User will see after successful log-in. This is where the order's delivery options are set. Select the desired Transportation Options, Pre-defined Delivery Site and add special instructions, if necessary. Click <Save> to continue.

*Delivery /
Address Setup*



Fig. 4

View Order

View Order (Fig. 5) allows the user to view pending orders and miscellaneous requests that have not yet been sent to the record center. The order can also be viewed at any time prior to it being sent to the record center by clicking the **<View Order>** button (Fig. 6) on any of the **Request** or **Add** screens. The **<Save & Continue>** button updates the order and allows the user to continue making changes to the existing view. **<Send Order>** sends the order, as displayed, to the record center.

User menu >
View Order

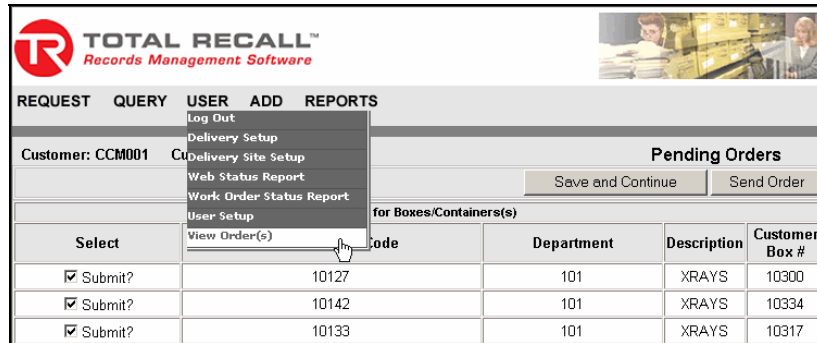


Fig. 5

<View Order>
button

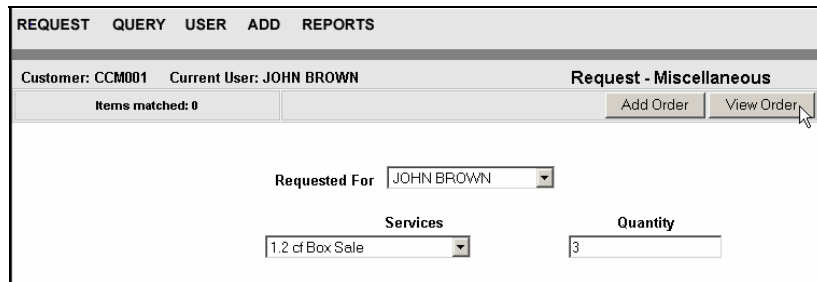


Fig. 6

Web Status

Web Status Report allows the user to view any web orders submitted within user-defined date parameters. Select **User > Web Status Report** to display the screen similar to Fig. 8. Enter the **Beginning Date** either by typing in the field or by using the calendar selection button. By default, the current date is automatically populated in the **Ending Date** field, but this date can be changed, as well. Click **<Submit>** to view the report, similar to Fig. 9.

User menu >
Web Status
Report

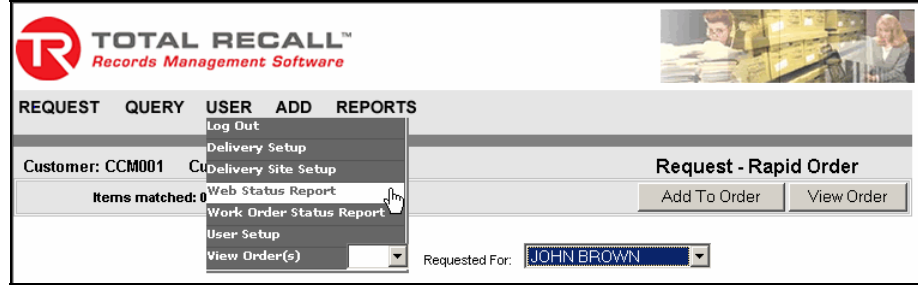


Fig. 7

Calendar
Selection button

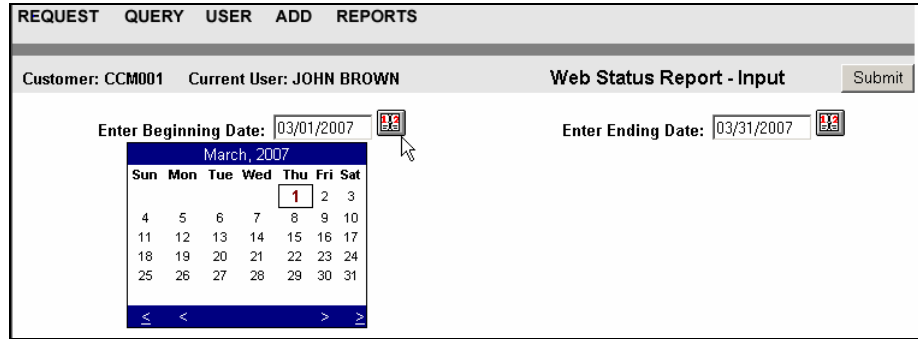


Fig. 8

Sample
Web Status
Report

The screenshot shows the 'Web Status Report - Output' screen. At the top, there is a navigation menu with options: REQUEST, QUERY, USER, ADD, and REPORTS. Below the menu, there is a 'Customer: CCM001' field and a 'Current User: JOHN BROWN' field. To the right, there is a 'Web Status Report - Output' section. Below this, there is a table with the following data:

Web No	Work Order No	Date/ Time Submitted	Date/ Time Imported	Requested By
4	000107	03/13/2007 01:58:19 PM	03/13/2007 02:05:42 PM	JOHN BROWN
5	000108	03/15/2007 02:22:23 PM	03/15/2007 03:08:31 PM	JOHN BROWN
6	000109	03/22/2007 07:15:03 PM	03/23/2007 07:19:58 AM	JOHN BROWN

Fig. 9

Work Order Status

Work Order Status Report allows the user to see what Work Orders have been completed at TCIM. This report will display all Closed work orders for the client, regardless of whether they were imported from the web or not. *Note: This report will not display any Work Orders still open at TCIM.* Select **Work Order Status Report** from the **User** menu to display a screen similar to Fig. 11. Again, use the calendar selection button to enter the **Beginning Date**. By default, the current date is automatically populated in the **Ending Date** field, but this date can be changed, as well. Click <Submit> to view the report, similar to Fig. 12.

User menu >
Work Order
Status Report

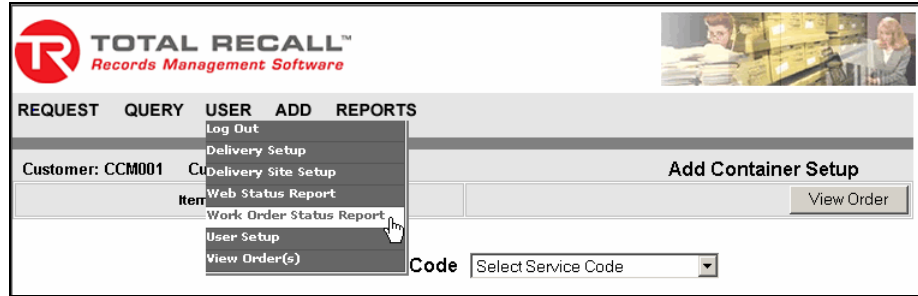


Fig. 10

Calendar
Selection button

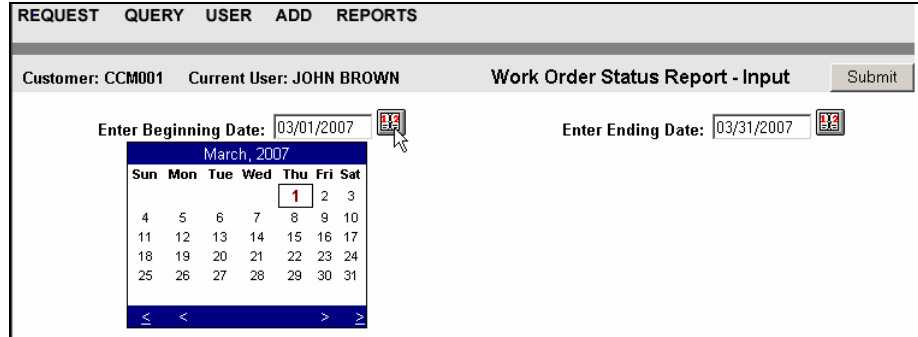


Fig. 11

Sample
Work Order
Status Report

Work Order No	Date Created	Due Date	Requested By
000107	03/13/2007	03/13/2007	JOHN BROWN
000108	03/15/2007	03/16/2007	JOHN BROWN
000109	03/22/2007	03/24/2007	JOHN BROWN

Fig. 12

Request Menu

Use the **Request-Miscellaneous** option to order boxes, request a pick up of containers, or other services that TCIM may offer. Select from the **Services** drop-down list, enter applicable **Quantities**, and click the **<Add Order>** button.

Fig. 13

Query Menu

The Query Menu offers up to four options that allow a user to search for an item or a group of items that match specified criteria. Details pertaining to the selected records will display and containers and/or files can be requested from the resulting set.

Query Menu

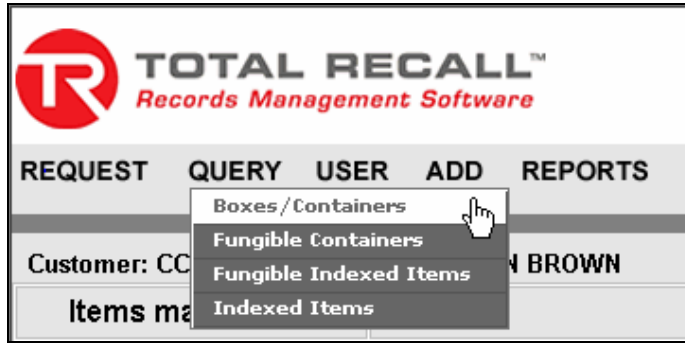


Fig. 1

Permissions for the Query Menu are controlled by TCIM.

Boxes / Containers

To search for **Boxes/Containers**, select that option from the **Query** menu. A screen similar to Fig. 2 will display. *NOTE: The search fields on this screen are customizable and the display will vary by client.*

Enter Search Criteria

A screenshot of the 'Query - Boxes/Containers' search screen. At the top, it shows 'Customer: OPU001' and 'Current User: CINDY JONES'. Below this, there is a header area with 'Items matched: 0' and two buttons: 'List' and 'Permed Out'. The main search area includes a 'Requested For:' dropdown menu set to 'CINDY JONES'. Below that are radio buttons for 'Retrieved', 'Not Retrieved', and 'Both', with 'Both' selected. The search criteria section includes several fields with dropdown menus for operators: 'Container Bar Code' (Equals), 'From Date' (Equals), 'To Date' (Equals), 'Effective Date' (radio button), 'Expiration Date' (radio button), 'Description' (Contains), 'Customer Box #' (Contains), 'Range From' (Contains), and 'Range To' (Contains). Each field has a corresponding input box. The 'Department' is set to '2001'.

Fig. 2

To build a Query, select whether the Query Result set is to include only **Retrieved** containers, only **Not Retrieved** containers or **Both** retrieved and not retrieved containers. Decide which field to search on, select the operators to be used, and enter the information that is to be matched in the field to the right of the operator. Each of the operators and their functions are detailed below. *Note: Not all operators will be available for all fields.*

- Contains** The field *contains* the requested result. The searched field may have additional data or text in it, as well.
- Equals** Searches for a field result that is exactly what has been entered.
- Greater than** Returns all results greater than the entered data.
- Less than** Returns all results less than the entered data.
- Between** Searches for all results between a beginning and ending entry. To use the Between operator, enter the first criteria, separate with a comma, then enter the last criteria. (Example: 100, 200 would return all items between 100 and 200.)

After all search criteria are entered, click the <List> button to list all matching records from the active database. Click the <Permed Out> button to list all matching records from the permanent removal database. A sample of a query result listing is shown on Fig. 3.

*Sample Results
Select to Submit*

Details	Submit?	Action	Container Bar Code	From Date	To Date	Effective Date	Expiration Date	Record Series	Record Series Description	Department	Description	Customer Range Box #	Range From	Range To
1	<input type="radio"/> Yes <input checked="" type="radio"/> No	Request Container - Web	10025	//	//	01/10/1998	01/31/2008	--	--	2001	NEW STUDENT APPLICATIONS	100009	M	MC
2	<input type="radio"/> Yes <input checked="" type="radio"/> No	Request Container - Web	10026	//	//	01/10/1998	01/31/2008	--	--	2001	NEW STUDENT APPLICATIONS	100010	ME	MU
3	<input type="radio"/> Yes <input checked="" type="radio"/> No	Request Container - Web	10039	//	//	01/10/1998	01/31/2008	--	--	2001	NEW STUDENT APPLICATIONS	100023	M	MO

Fig. 3

The Query Result displays the list of matching records. If there are multiple results, use the navigation buttons view the different records: <Top>, <Prior>, <Next>, and <Bottom>. To change the order in which the records display, click on one of the blue column headers. This will sort the data in the order of the column selected. To view details on a specific record, click the corresponding record number under the **Details** column.

From this screen, records can be selected by clicking **Yes** to the right of the record under the **Submit?** column. Next, select the action to be performed for the designated container by choosing from the drop-down list in the **Action** column. Click the <Add to Order> button to complete the selections and add the items to the current order.

Request Status

Customer: OPU001 Current User: CINDY JONES		Add Order Status	
		Send Order	View Order
Total Containers Requested: 1 Number Added to Order: 1 Total Errors: 0			

Fig. 4

An **Add Order Status** window, similar to Fig. 4, will display the results of the request. Click <View Order> to view items on the current order, or <Send Order> to send the order to TCIM. Refer to the **Request and Rapid Order QRG** for information of request errors.

Indexed Items

Similarly, to search for files or other indexed items, select **Query > Indexed Items**. A screen similar to Fig. 5 will display. *NOTE: Again, the display and search fields will vary by client.*

Enter Search Criteria

Customer: CCM001 Current User: JOHN BROWN Query - Indexed Items

Items matched: 0 [List] [Permed Out]

Requested For: JOHN BROWN

Retrieved Not Retrieved Both

Container Bar Code: [Equals] []

File Bar Code: [Equals] []

From Date: [Equals] []

To Date: [Equals] []

Effective Date Expiration Date [Equals] []

Department: 101 XRAY

Description: [Contains] []

Medical Rec #: [Contains] []

Last,First Name: [Contains] [jones]

Year of Service: [Greater Than] [1999]

Date of Birth: [Contains] []

Customer Box #: [Contains] []

Fig. 5

Like containers, first select whether the Query Result set is to include only **Retrieved** items, only **Not Retrieved** items or **Both**. Decide which field to search on, select the operators to be used, and enter the information that is to be matched in the appropriate field.

After all search criteria are entered, click the **<List>** button to list all matching records from the active database or the **<Permed Out>** button to list all matching records from the permanent removal database. A sample of a query result listing is shown on Fig. 6.

Sample Results Select to Submit

Customer: CCM001 Current User: JOHN BROWN Query - Indexed Items

Items matched: 4 [Add To Order] [View Order]

[Top] [Prior] [Next] [Bottom]

Details Submit?	Action	Container Bar Code	File Bar Code	From Date	To Date	Effective Date	Expiration Date	Record Series	Department	Description	Medical Rec #	Last,First Name	Year of Service
<input checked="" type="radio"/> Yes <input type="radio"/> No	[Request File - Web]	10092	1024	01/01/1998	01/31/1998	02/26/1999	01/31/1999	XRAY	101	..	86550	JONES, JOHN	2000
<input checked="" type="radio"/> Yes <input type="radio"/> No	[Request File - Web]	10093	1037	01/01/1998	01/31/1998	02/26/1999	01/31/1999	XRAY	101	..	98865	JONES, JON	2000
<input type="radio"/> Yes <input checked="" type="radio"/> No	[Request File - Web]	10093	1038	01/01/1998	01/31/1998	02/26/1999	01/31/1999	XRAY	101	..	97090	JONES, DONNA	2000
<input type="radio"/> Yes <input checked="" type="radio"/> No	[Request File - Web]	10093	1039	01/01/1998	01/31/1998	02/26/1999	01/31/1999	XRAY	101	..	86907	JONES, JULIE	2000

Fig. 6

Record navigation and request selection methods for indexed items are similar to those for containers. Click **Yes** to **Submit** an item, choose an **Action** from the available drop-down list, and click **<Add to Order>** to request the item. An **Add Order Status** window will display the results of the request.

Add Menu

The Add Menu has up to three options for adding item information to the system prior to the containers or files being picked up. Most commonly, TCIM will provide the client with labels that have been pre-assigned and barcode printed. The information entered on TCIM E-Request is tracked by this unique barcode number.

Options for Pre-Assigned Labels are controlled by TCIM

Add Menu

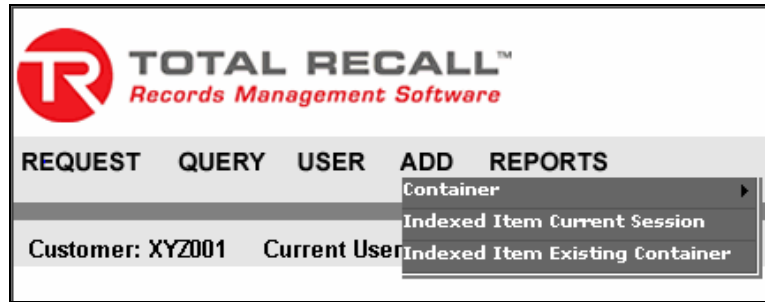


Fig. 1

Permissions for the Add Menu are controlled by TCIM.

Container – Single

To enter information on a single box being added to inventory, click **Add > Container > Single**. The first step is to select the **Service Code** for the item being added; click and select from the drop-down list similar to Fig. 2. After the Service Code selection has been made, an **Add Container** window, similar to Fig. 3 will display.

Add Container Setup

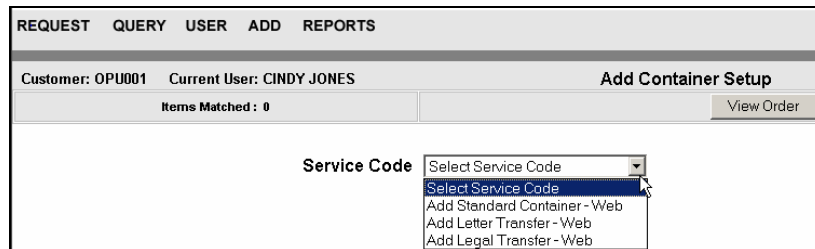


Fig. 2

Enter Reference Information

Fig. 3

The reference field options are established by TCIM and will vary from client to client. First, enter the unique, pre-assigned TR Container number in the **BarCode** field. Use the Tab key on the keyboard to move between fields, entering data as needed. Enter data in the **Date** fields in the following format: **mm/dd/yyyy**. The **Long Description** field can hold text up to 255 characters.

When all fields are complete, click the **<Add to Order>** button to add this item to the current pending order. The **Pending Orders** screen will display; confirm information is correct, then click **<Save and Continue>** to continue working.

Container – Multiple

To enter information on multiple containers in one step, click **Add > Container > Multiple**. The first step is to select the **Service Code** for the items being added; click and select from the drop-down list similar to Fig. 2. After the Service Code selection has been made, an **Add Container – Multi** window, similar to Fig. 4, will display.

Add Multiple Containers

Bar Code	From Date	To Date	Effective Date	Expiration Date	Customer Box #	Range From	Range To	Description
20025	01/01/2005	02/28/2005	03/27/2007	03/31/2017	407001	BE	CE	New Student Applications
20026	01/01/2005	02/28/2005	03/27/2007	03/31/2017	407002	CE	HO	New Student Applications
20027	01/01/2005	02/28/2005	03/27/2007	03/31/2017	407003	HO	MU	New Student Applications
20028	01/01/2005	02/28/2005	03/27/2007	03/31/2017	407004	MU	RA	New Student Applications

Fig. 4

The Add Container – Multi screen displays the same reference fields and captions in a table format. Again, enter the unique, pre-assigned TR Container number in the **BarCode** field. Use the Tab key on the keyboard to move between fields, entering data as needed. When all fields are complete, click the **<Add to Order>** button to add this item to the current pending order. The **Pending Orders** screen (Fig. 5) will display to confirm information is correct. Click **<Save and Continue>** to continue

working or **<Send Order>** to send the order to TCIM for processing.

Pending Order

Customer: OPU001		Current User: CINDY JONES		Pending Orders										
												Save and Continue		Send Order
Add Container														
Select	Bar Code	From Date	To Date	Effective Date	Expiration Date	Department	Record Series	Description	Customer Box #	Range From	Range To	Long Description	Add Indexed Items	
<input checked="" type="checkbox"/>	Add20025	01/01/2005	02/28/2005	03/27/2007	03/31/2017	2001		New Student Applications	407001	BE	CE		20025	
<input checked="" type="checkbox"/>	Add20026	01/01/2005	02/28/2005	03/27/2007	03/31/2017	2001		New Student Applications	407002	CE	HO		20026	
<input checked="" type="checkbox"/>	Add20027	01/01/2005	02/28/2005	03/27/2007	03/31/2017	2001		New Student Applications	407003	HO	MU		20027	
<input checked="" type="checkbox"/>	Add20028	01/01/2005	02/28/2005	03/27/2007	03/31/2017	2001		New Student Applications	407004	MU	RA		20028	

Fig. 5

Indexed Item Current Session

After containers have been added using the above methods, indexed items can also be added prior to sending the order to TCIM. Use the **Add > Indexed Item Current Session**, to open a selection screen similar to Fig. 6.

Select Container to Index

REQUEST	QUERY	USER	ADD	REPORTS
Customer: OPU001		Current User: CINDY JONES		Add Indexed Item(s) Current Session
Select Container Number				
20025 20026 20027 20028 20030				

Fig. 6

In the previous example, the client added five containers, with barcode numbers 20025, 20026, 20027, 20028, and 20030. The client did not choose **<Send Order>**, so the containers still exist in the Current Session.

Select a container to add the indexed items to by clicking the link for the container barcode number. An **Add Indexed Item** screen similar to Fig. 7 will display. Enter information in the reference fields as needed, using the Tab key on the keyboard to move between fields. *Note: Captions will vary.*

Enter Reference Information

Customer: OPU001		Current User: CINDY JONES		Add Indexed Item(s)				
Items Matched : 0				Add Order				View Order
Item Bar Code : 20030								
Service Code: IFW - Index File - Web								
File Bar Code #	From Date	To Date	Effective date	Expiration Date	Index Item Id	Description		
20100			03/27/2007		555-55-1111	Smith, Andrea		
20101			03/27/2007		555-55-2222	Smith, Bob		
20102			03/27/2007		555-55-3333	Smith, Cindy		
20103			03/27/2007		555-55-4444	Smith, David		
			03/27/2007					

Fig. 7

When all fields are complete, click the **<Add to Order>** button to add this item to the current pending order. The **Pending Orders** screen will display; click **<Save and Continue>** to continue working or **<Send Order>** to send the order to TCIM for processing.

Reports Menu

TCIM E-Request has up to seven categories of Reports, most viewable in multiple configurations. **Department, Expire, Inventory, Removed** and **Retrieved** reports can be created for each **Item Type** and may be **Ordered By** one of the more than 10 field choices. In addition, if Custom Captions are established for the item type, those will be **Order By** choices, as well. Further, if the client has departments, reports may be further customized by **Department** record series. Clients, also, may be given permission to **View Invoices** and **Work Orders** via TCIM E-Request. These reports are ordered by invoice number or specific date range.

Permissions to view each type of Report are controlled by TCIM.

Reports Menu

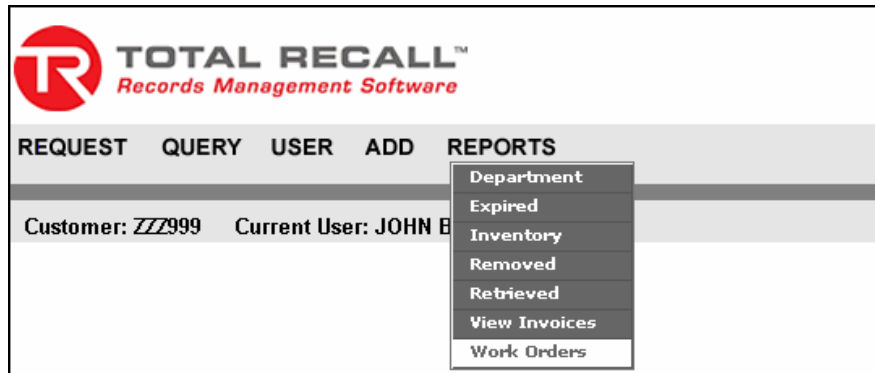


Fig. 1

*Inventory Report
Item Type,
Order By
Options*

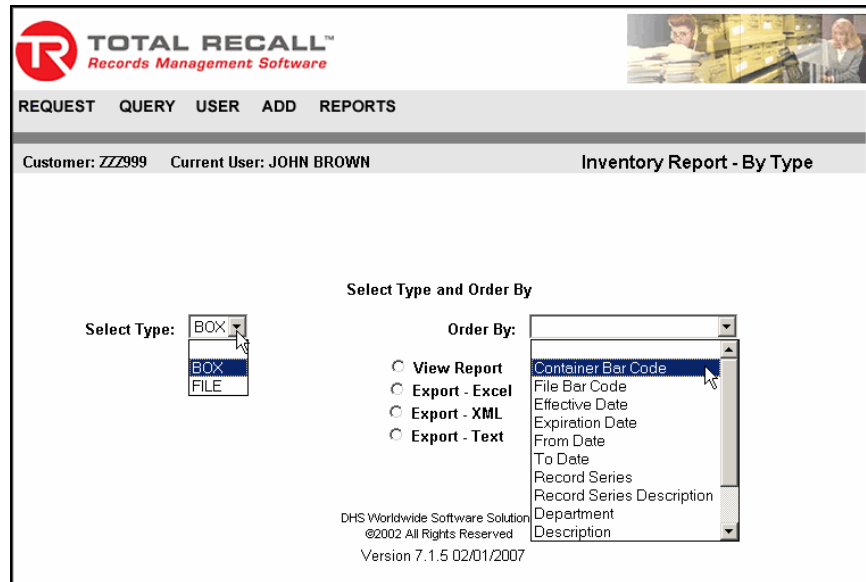


Fig. 2

Report Category Descriptions

Department	This report provides an inventory report by Department for a selected Item Type.
Expired	This report provides Expiration dates for a selected Item Type.
Inventory	This report provides inventory report for a selected Item Type by Client.
Removed	Report of all inventory removed for a selected Item Type by Client.
Retrieved	Report of all inventory retrieved for a selected Item Type by Client.
View Invoices	Provides a list of all invoices requested by Client. The user can select a specific Invoice and view the detail of charges.
Work Orders	Provides a list of all Work Orders requested by Client with details.

Order By Descriptions

Container Barcode	The unique Total Recall Container barcode number.
File Barcode	The unique Total Recall File barcode number.
Effective Date	This date reflects the date the item was added to inventory.
Expiration Date	This field is for the expiration or destruction date of the item. If retention codes are being used, the expiration date is automatically calculated.
From Date	This date field displays the beginning date range for the item. Optional field.
To Date	The field represents the last date for the item. Again, if retention codes are being used, this date is used to calculate the expiration date. Optional field.
Record Series	The record series reflects the general category of records that will be stored. Each record series has a unique identification number associated with it and can have an associated retention code and an item type.
Department	This field displays the department that the item is associated with, if a department was associated with the item when entered into inventory.
Description	A brief description of the item.
Client Box#	The Client's own identifier.

Reference and Custom Caption fields

Total Recall has additional reference fields that can be used to further identify and track an item. If a client has specific needs for those fields or for any of the above fields, custom captions can be employed. When properly enabled, these captions will display on the Order By and within the Report Results.

Creating and Viewing Sample Reports

Cindy Jones, of client OPU001, would like to view the inventory held for her department. After logging in, she clicks **Reports > Inventory** to prepare the report. From **Select Type**, she chooses **Box**. Next, from **Order By**, she chooses **Customer Box #** so that she can verify against her company's identifiers. Her associated **Department**, department **2001**, has been entered automatically. The TCIM E-Request display is similar to the figure below. To view the report on-screen, she clicks **View Report**.

Report Output Options

Fig. 3

A new window opens with a report similar to the one below. The report window title bar tells the type of item reported, **Box**, and how many records met the criteria, **56**. Note that the report is ordered by **Customer Box #** in descending order. Use the scroll bar on the far right of the window to view the entire report. The **<Print this Page>** button opens a standard Print dialog box.

Sample Report Output

Inventory Report for Type = BOX - # Records Retrieved = 56														
Print This Page														
Container Bar Code	File Bar Code	Effective Date	Expire Date	From Date	To Date	Record Series	Record Series Description	Department	Description	Customer Box #	Range From	Range To	Quantity	Long Description
10017	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100001	A	A	0	--
10018	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100002	B	C	0	--
10019	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100003	D	D	0	--
10020	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100004	E	F	0	--
10021	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100005	G	G	0	--
10022	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100006	H	H	0	--
10023	0	01/10/1998	01/31/2008	//	//	--	--	2001	NEW STUDENT APPLICATIONS	100007	I	J	0	--

Fig. 4

When complete, close the report window and return to the TCIM E-Request Inventory Report window for further browsing or selections.

Next, Cindy would like to view a previous invoice. She clicks **Reports > View Invoices**, then selects the appropriate invoice number and date from the **Select Invoice Number** drop-down list.

*View Invoices
Sample
Selections*

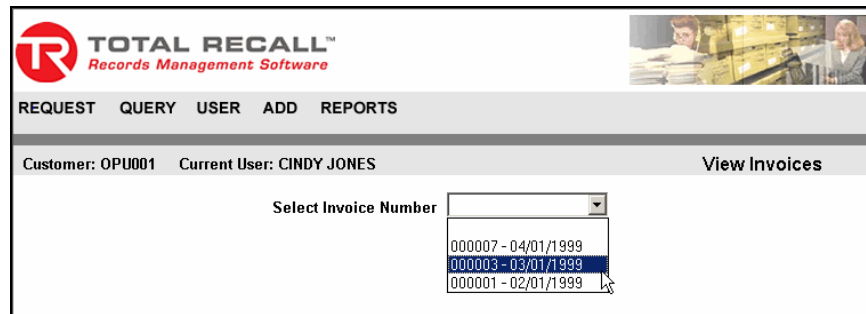


Fig. 5

The details of that invoice are displayed in the same window, similar to the figure below. To print the invoice, use the web browser's Print button or **File > Print** menu option. Select another menu option for further Reporting or TCIM E-Request functions.

*View Invoices
Sample Output*

		<u>Invoice Date</u>	<u>Invoice Amount</u>				
		03/01/1999	\$77.85				
<u>Service Code</u>	<u>Service Code Description</u>	<u>Service Code Price</u>	<u>Quantity</u>	<u>Tax Amount</u>	<u>Amount</u>	<u>Department</u>	
IB2	--	\$1.20	18,000	\$0.00	\$21.60	1001	
TR1	--	\$8.00	4,000	\$0.00	\$32.00	1001	
TR2	--	\$1.00	17,000	\$0.00	\$17.00	1001	
RC1	--	\$1.25	3,000	\$0.00	\$3.75	1001	
RC2	--	\$1.25	2,000	\$0.00	\$2.50	2001	
TR2	--	\$1.00	1,000	\$0.00	\$1.00	2001	

Fig. 6

Additional Report Output Options

In the previous example, the client used the **View Report** option to display the report results on-screen. TCIM E-Request also provides the ability to export report results in three different formats: Excel worksheet, and XML document, or simple Text.

Export - Excel Select this option to open a **File Download** dialog box that gives the option to save as a Microsoft Excel worksheet. Click **<Save>**, then specify file File Name and Location in the resulting **Save As** dialog box.

Export - XML XML is a markup language for documents containing structured information. Select this option to open a new browser window with the resulting XML code. Choose **File > Save As** to specify File Name, Location and Format.

Export - Text Select this option to open a new browser window with the resulting report text. Again, choose **File > Save As** to specify File Name, Location and Format of the report results.